

Phone Messenger User Guide

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| Document History | | | Version | |
|------------------|---|---------|------------|----------|
| | Edition | Date | Document | Software |
| | First Edition | 07-2006 | TOPS-PM-AA | 3.2.1 |
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Disclaimer

This guide has been provided by TOPS Software, LLC as a reference and help tool when using the TOPS 2000™ Phone Messenger feature. Illustrations used in this guide may display screens with modules, features, and or functions that may not be part of the basic system but available as add-ons or as plug-ins to an interface to third party products.

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It is also assumed that the user of this guide is familiar with basic windows functionality and navigation tools. Refer questions regarding the use of Windows Explorer to your system administrator.

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Introduction

The TOPS Phone Messenger allows you to track incoming phone calls and create internal quick messages right from the *TOPS 2000™* system. This feature is intended to improve communication with both your external and internal customers. As part of the *TOPS 2000™* system, Phone Messenger saves you time with features such as owner lookup that works across all your communities eliminating the need to enter owner information in the message fields.

You have a record of who calls, what their issues are, who the call got assigned to, and the amount of time spent on the call. The Phone Messenger program gives you the ability to send and track messages from homeowners to other TOPS users in your network.

Phone Messenger utilizes the **TOPS Users and Password** security feature, so when you log in to *TOPS 2000™* you receive an alert that you have new messages. All the activity is tracked so no caller should ever fall through the cracks. Monitor Phone Messenger activity by running detailed or summary reports for all users or individual user, such as the popular **Time Spent By Community** report.

Quick Message is the internal messaging feature of **Phone Messenger** that enables you to send a quick message or broadcast messages to co-workers without leaving the TOPS 2000™ system. For example if you need everyone that is currently logged into TOPS to log out, you can use **Quick Message** to broadcast the request to everyone.

COMMAND BUTTONS



Add Message



Select Message



Delete Message



New Quick Message

TASK BAR ICON



MY MESSAGES DISPLAY FILTERS

These sort filter options appear in the **My Messages** window. They allow you to select how you will view your messages in the **My Messages** window, by Status, Priority and Viewed. Each option displays a different image on the button. You may also set default display options using the **Preferences** option.



Status – filter options are:
<All>
Open
Closed



Priority – filter options are:
<All>
Low
Normal
High



Viewed – filter options are:
<All>
Viewed
Not Viewed

Phone Messenger

Phone Messenger must be activated from within TOPS 2000™. Once activated, **Phone Messenger** will run in the background so you don't have to open it each time you want to add a message.

Once **Phone Messenger** is activated, there are several ways to open the **My Messages** window. You may access it by pressing <F8> on the keyboard or double-click the Phone Messenger icon on the task bar.

But before Phone Messenger can be activated, a user must first have permission to access and use **Phone Messenger**. The access and permission settings are defined in the **User Group Control** function in the **Users and Passwords** under **Administration** on the TOPS main menu bar. Users must be assigned to a group that has phone messenger permissions turned on in order to use this feature.

ACTIVATE PHONE MESSENGER

To **activate** Phone Messenger **you must start** TOPS and select any community. Phone messenger functionality is not limited to the active community. The owner lookup in Phone Messenger will function across all your communities regardless of the community you are in.

From the TOPS 2000™ main menu:

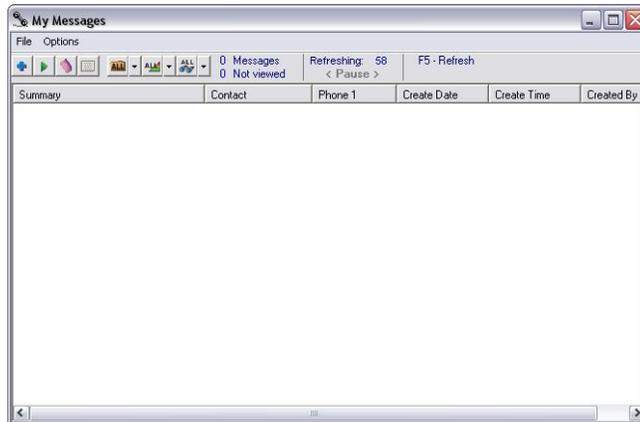
1. Click **File**.
2. Click **Phone Messenger** on the drop down menu.

Figure 1



3. **My Messages**, the default window appears.

Figure 2



4. The Phone Messenger icon will also appears on your task bar.
Once TOPS is started you may also activate Phone Messenger by pressing <F8> on your keyboard.

If you close Phone Messenger or you close TOPS 2000™ you will have to re-activate Phone Messenger.

PHONE MESSENGER OPTIONS/DEFAULTS

When you activate TOPS 2000™ Phone Messenger how messages and the information displayed in the My Messages window depends on the default settings you selected in My Preferences. You are able to set your preferences so that you first see only those messages with the Status of Open and Priority Level of High. You also decide how often you need Phone Messenger to refresh or update your list.

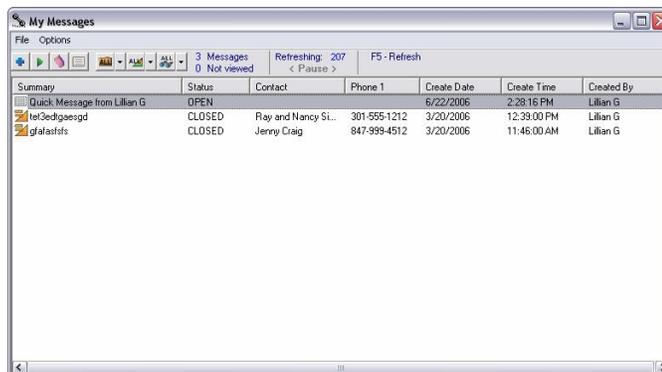
Define “My Settings and Preferences”

You will want to define the default settings for how your messages will appear when you open Phone Messenger.

From the **My Messages** window:

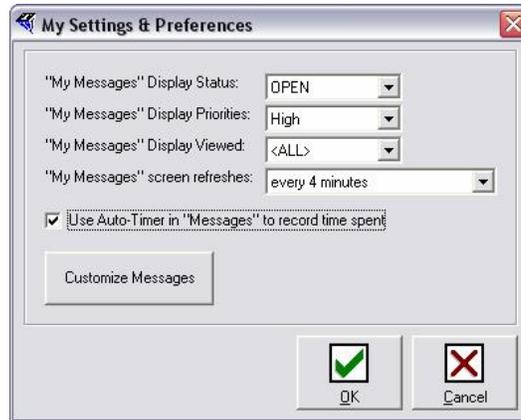
1. Click **Options** on the menu bar.

Figure 3



2. Select **My Setting & Preferences** from the drop down menu.
3. The **My Settings & Preferences** window appears.

Figure 4



4. Select the desired default **Display Status** setting from the drop down menu.
5. Select the desired default **Priorities** setting from the drop down menu.
6. Select the default **Viewed** setting from the drop down menu.
7. Click the checkbox if you wish the **auto timer to track time** spent on a call.

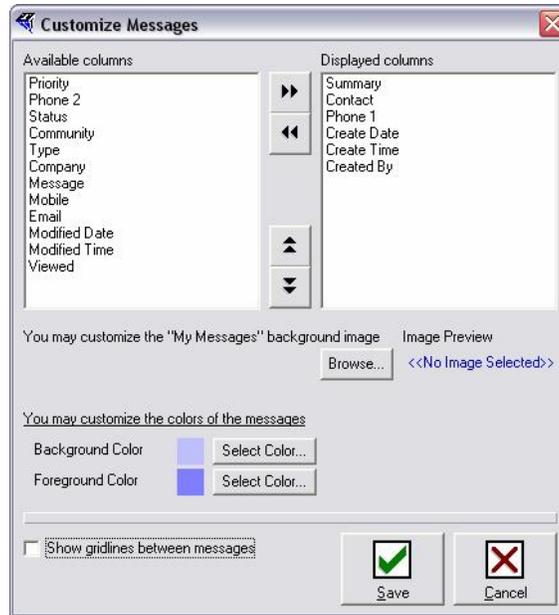
You may also customize the colors, change the order, or include additional data columns in the **My Messages** window.

8. Click the **Customize Messages** button to change the appearance of the **My Messages** window.
9. The **Customize Messages** window appears.
10. Click to highlight (select) an item in the available list box that you wish to add to you're **My Messages** window then click the **Right Arrow** button.
11. The item will be moved to the **Displayed columns** list box.

The up and down arrow buttons allow you to change the column order to customize where the column header will appear in your **My Messages** window.

12. Click to highlight (select) a column header in the **Displayed column** list box, click the up or down arrow button to move the column header to the desired sequential position.

Figure 5



13. Click **Save**.
14. You are returned to **My Settings & Preferences**.
15. Click **OK** to save your settings.

MY MESSAGES

From the **My Messages** window you are able to manage all your messages, add new messages for other users, edit messages, delete your messages, reassign messages to another user and create internal messages.

You can access the **My Messages** window several different ways:

1. From the TOPS Main menu, click **File**.
2. Select **Phone Messenger** from the drop down menu.

If **Phone Messenger** has already been activated, you may double-click the *Phone Messenger* icon on your taskbar to open **Phone Messenger**.

Or when in TOPS, you may click the **<F8>** key on your keyboard.

Add a New Message

From the **My Messages** window:

1. Click the **New** button.
2. The **New Message** window appears.

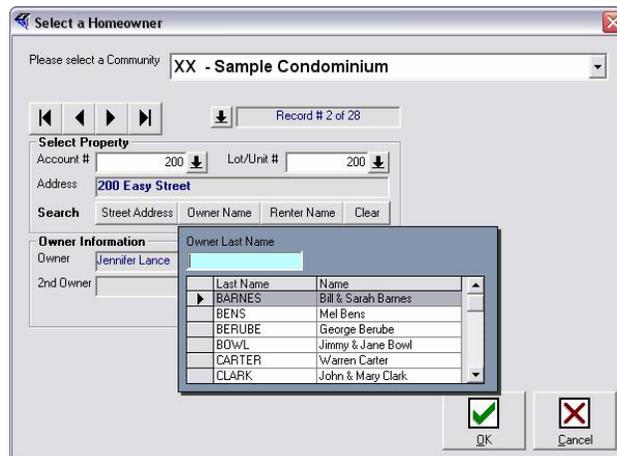
*Note there is a **Save & Add** button and a **Save** button. The **Save & Add** button when used will save the message, clear all fields in preparation for the next message. The **Save** button will save your data and close the **New Message** window.*

Figure 6

3. In the **Summary** field enter a brief description of what the call is about.
4. Click the **For** field down arrow to reveal a list of TOPS users.
5. Select the user that will receive this message.

6. In the **Contact** field enter the name of the caller.
7. If the contact is a resident: click the **Contact** button to the right of the field.
8. The **Select a Homeowner** window appears.

Figure 7



9. Click the **Community** field down arrow and select the community this contact is from.

*You may scroll through owner database using the scroll arrows, or drop down arrows by **Account #** or **Lot/Unit #**. Select a **Search** option that will sort data by **Street Address**, **Owner Name**, or **Renter Name**.*

10. Click **OK** when you have located the desired record.
11. You are returned to the **Message** window, and the contact information including address and phone number should appear in the appropriate fields.
12. Enter additional information in the **Message Detail** textbox.
13. Click checkbox items as needed to direct message recipient.
14. Click the **Status** down arrow, if the message requires no further action select Closed.
15. Click the **Priority** down arrow and a select of level of importance for this message.
16. Click **Save** or **Save & Add**.

USING MY MESSAGES

As soon as you log in to your TOPS program if you have any messages you will receive the following **New Message** alert letting you know.

Figure 8



When you first open **Phone Messenger**, **My Messages** is the default view. From here you will manage your messages. You can add, edit and delete your messages, create messages for other users, send **Quick Messages**, and run reports.

In addition to the view options you defined in **My Preferences**, the **My Messages** window provides tool bar buttons with which you can override you're **My Preferences** setting and select how to view and sort your messages without changing the **My Preference** default settings.

You are able to sort your messages further by ascending or descending order by clicking a column header to activate the sort. An Up or Down arrow will appear indicating the order.

Figure 9



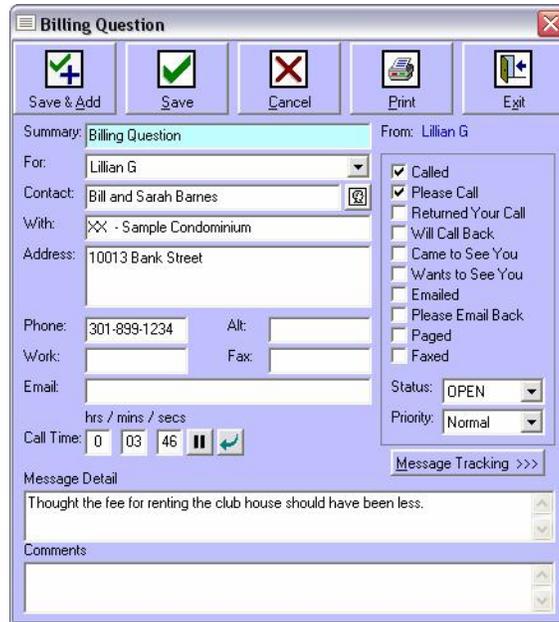
View a Phone Message

Click the **OK** button on the **Message Alert** to view that message immediately or go to the **My Messages** window to view your entire message list.

From the **My Messages** window:

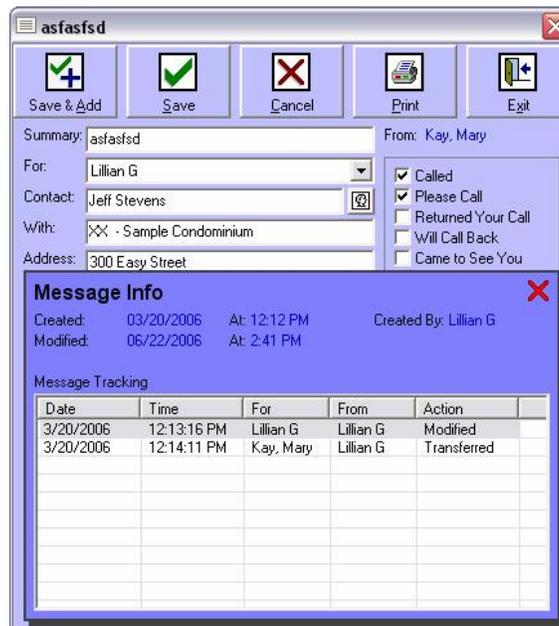
1. Double-click an item in your list.
2. The **Message** window appears displaying all the information contained in the message.

Figure 10



3. Click the **Message Tracking** button to see more information such as date and time; who created the message.

Figure 11



4. Click the **Red X** to close the **Message Info** window.
5. You are returned to the **Message** window.
6. Click the **Status** button to close or change the status of this message.
7. Click **Save**. You are returned to **My Messages** window.

Edit and / or Reassign a Message

Once you have reviewed the message you may add a comment then reassign the message to another user for follow up.

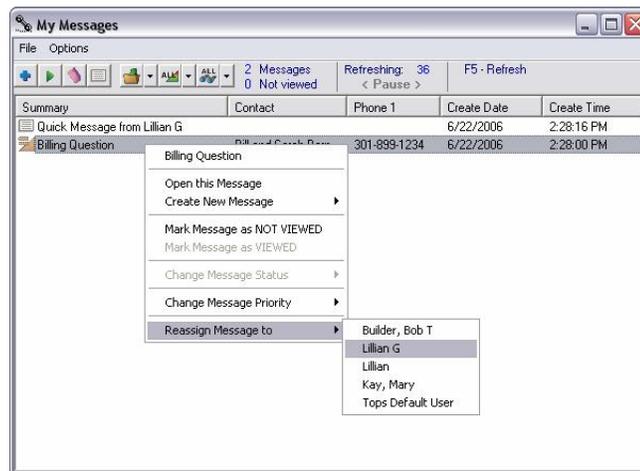
To Edit a Message:

In the open Message click in the field you wish to edit and type over, or add information in the comment field for the user to whom you are reassigning the message. Click **Save** to retain your changes.

To forward a message to another TOPS user:

1. Once you have reviewed the message, Click **Exit**.
2. You are returned to the **My Message** window.
3. Click to highlight the selected message then right-click your mouse.
4. A drop down menu appears.
The Message summary appears at the top of the drop down menu. Allowing you to confirm that you have selected the correct message.
5. Select **Reassign Message to** from the drop down menu.

Figure 12



6. Double-click the user's name that you wish to reassign this message to.
7. The message is removed from your My Messages list.

Sending a Quick Message

Phone Messenger allows you to create **Quick Messages** for internal distribution to other users.

From the **My Messages** window:

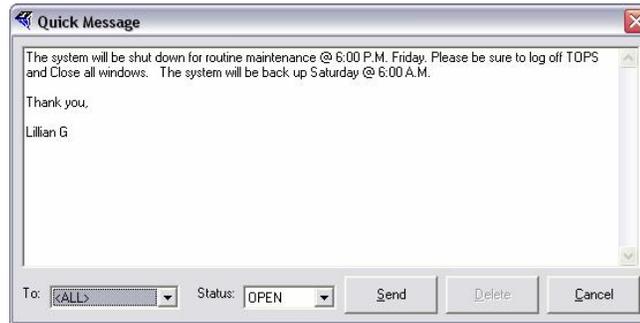
1. Click the **Quick Message** icon on the toolbar (fourth from the left).

Figure 13



2. The **Quick Message** window appears.
3. Click in the text box and type your message.

Figure 14



4. Click the “**To:**” down arrow and select the user you are sending this Quick Message to. *Keep in mind the default setting is <ALL> so be sure your message goes to the intended party.*
5. Click **Send**.

Viewing Quick Messages

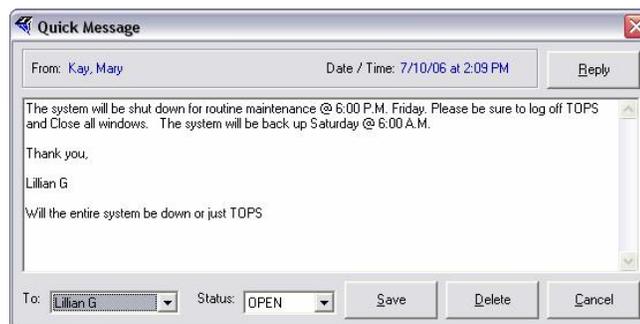
Upon logging in to TOPS you will receive the same Alert for Quick Messages as you receive for Phone Messages. You may click the view option in the **Alert** dialog box or proceed to your **My Messages** window and open your **Quick Messages**.

Sending a Reply

To respond to a Quick Message:

1. Place cursor in the **Quick Message** text box and type your message.
2. Click the **Reply** button located at the top right of the text box.

Figure 15



You can change the status and retain the message, or Click the **Delete** button located at the bottom of the **Quick Message** window and remove the message from the **My Messages** list.

REPORTS

TOPS Phone Messenger currently provides three reports types that are available in both summary and detail formats. The report types are: **My Messages**, **All Messages**, and **Community Time Spent**. Report information can be defined by Date range, and status or priority. The Community Time Spent report can be for a single community or a range of communities. If you are authorized you may run reports by selected users. The *Detailed Report* options will include message comments.

When you access **Reports** the out options that are displayed will be determined by the *Report Type* you are defining.

View or Print Phone Messenger Reports

From the **My Messages** window:

1. Click **Options** on the menu bar.
2. Click **Reports** from the drop down menu list.
3. The **Phone Messages Reports** window appears.

Figure 16



The All Messages option defaults to the logged in user, selecting other users is an option only available to authorized user groups as defined in Users and Passwords.

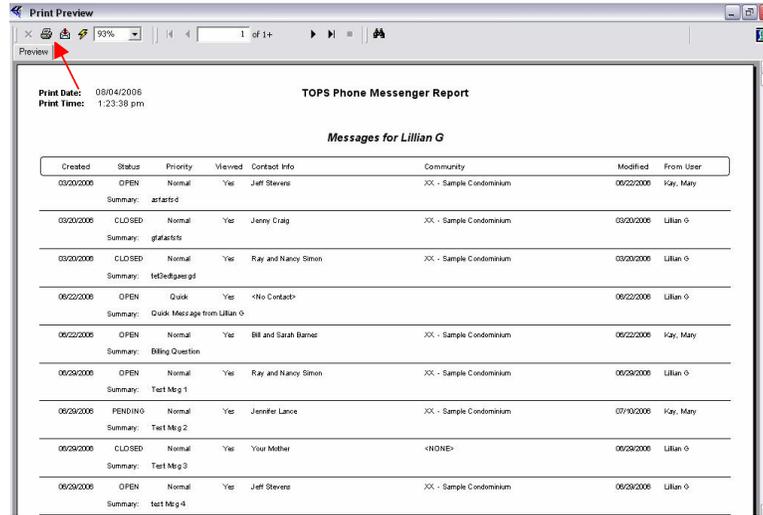
4. Click the **Report Type** drop down arrow and select a report.
5. Click the radio button to select either a *Summary* or *Detailed* version of this report.
Date Range allows you to narrow the number of messages to a select Beginning date and Ending date.
6. Click the **Ellipses** button to display a calendar and pick a date for your **Beginning Date** and **Ending Date** options.
7. Select the **Message Status** to be included in the report, your options are *<ALL>*, *Open*, or *Closed*.
8. Select the **Priority** level to be included in the report, *<ALL>*, *Low*, *Normal*, or *High*.
9. Click the **Print** button.

If Show Print Preview is unchecked the report print job will go directly to your network printer.

If Show Print Preview is checked:

- The **Print Preview** window opens, displaying the report.

Figure 17



- Review the report, Click the **Red X** to cancel the print command and close the **Print Preview** window.
- or
- Click the **Print** icon on the **Print Preview** tool bar.
- The **Print** dialog box opens displaying you default network printer.
- Select print options.
- Click **OK**.

Figure 18

