



# Knowledge Base Article

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**Article ID:** 4084  
**Subject:** Procedures for Realogy Single Entry Reporting (Submission to CrestEDG)  
**Last Modified:** April 9, 2009  
**Applies to:** Pro Gold i2 3.xx

**Summary:** The Single Entry reporting process is dependent on information being collected and reported in a timely manner and does not require a physical login to the **CrestEDG** system to report it. Data must be entered into **Pro Gold i2**, validated and then it is transmitted to Crest. This shift in focus will impact the internal procedures of your organization. Internal processes should be reviewed to ensure required system data is collected sooner rather than later. Understanding how the process works will aid implementation efforts.

**Procedure:** Key points of the Realogy Single Entry Submission:

## Step 1: Basic Principles of the Realogy Single Entry Process

- a. **Observe Pro Gold i2 business rules:** The same rule validation in **CrestEDG** is now in **Pro Gold i2**
  - i. In addition to the typical transaction requirements, the property record in **Pro Gold i2** contains a **Crest Tab** for Crest unique requirements
- b. Listing transaction records are initially populated via the MLS import process and must be updated and validated for **CrestEDG** submission (Refer to [Knowledge Base Article 4086](#))
- c. **Selling Side Only Property** transactions (co-op listings) which were previously entered directly in **CrestEDG** are now to be entered via **Pro Gold i2** for submission to **CrestEDG** (**Note:** this is not adding duplication it is simply changing the point of where the data is entered) (Refer to [Knowledge Base Article 4087](#))
- d. **Other Income Property** transactions which were previously entered directly in **CrestEDG** are now to be entered via **Pro Gold i2** for submission to **CrestEDG** (**Note:** this is not adding duplication it is simply changing the point of where the data is entered) (Refer to [Knowledge Base Article 4088 and 4224](#))
- e. **Property transactions that are not reportable to CrestEDG:**
  - i. Select **No** in the **Report to Crest** box under the **Crest Tab** in **Pro Gold i2**
  - ii. Setting will not allow the record to transmit and removes it from the invalid list (does not need to go to Crest)
- f. Sales Associate information is maintained under the **Agent Information** icon on the main **Properties Tab**: If an agent holds a key position, the key position information must be entered via the key position fields in **Agent Information** form (Refer to [Knowledge Base Article 4085](#))
- g. If a NON-Sales Associate holds a key position, that person must be setup as an employee under the **Employee Setup** icon on the **Payroll Tab** (Refer to [Knowledge Base Article 4217](#))
- h. **Media** (i.e., Listing Photos and Virtual Tour links) items are pushed to brand website via the **CrestEDG** submission process (Refer to [Knowledge Base Article 4091, 4161 and 4217](#))
  - i. Information available next business day
  - ii. Can be populated via an MLS import process (if photos/Virtual Tour links are provided in the import)
  - iii. Can be populated manually to a property record
  - iv. First nine photos submit to **CrestEDG**
    - Can manipulate photo order to control which photos submit to **CrestEDG**
    - Need to add short and long descriptions (i.e., captions) for brand site display
    - Deleting a photo will remove it from **CrestEDG** and brand website

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- i. **Features** (e.g., fireplace, 2 car garage, basement, etc...) are pushed to brand website via the **CrestEDG** submission process (Refer to [Knowledge Base Article 4162](#))
  - i. Information available next business day
  - ii. Assigned via each property record
  - iii. Can be modified updated as needed
  - iv. Changes will update **CrestEDG** and brand website
- j. Client should setup **Pro Gold i2** user accounts for each user for security purposes
- k. **Pro Gold i2** is now a critical component to Franchise reporting, therefore, it is vital that a good backup plan is implemented for the data file
- l. Duplicate transactions in **CrestEDG** can only be removed by **CrestEDG** (must be done by contacting the **CrestEDG** help desk directly)

## Step 2: Daily Procedure 1:

- a. Transactions (i.e., properties) must be maintained "daily" in **Pro Gold i2**:
- b. Use the **Find** button in the **Work With Properties** icon on the main **Properties Tab** and check the following categories:
  - i. **Invalid Properties**
    - Property records that have failed business rule validation
    - Property records that have an error on the Crest Submission report that must be corrected

## Step 3: Daily Procedure 2:

- a. Crest submits should be done daily, but can be done anytime
- b. Only one crest submission should be performing at the same time
  - i. Highly recommended that one person be appointed to be responsible for this task
  - ii. During the Transmission process, the **Realogy** submit screen will minimize and will continue to submit changes to **CrestEDG**, while work in **Pro Gold i2** can continue.
  - iii. Once data is submitted to Crest, **Pro Gold i2** will receive the results from Crest when the data is accepted. The status of the submission can be viewed through the **Crest Submission Results** report:
    - Items report in two categories:
      - (1) **Business Rule Violations**
      - (2) **Successfully Received and Processed**
    - Items reported under the **Business Rule Violations** list must fixed in **Pro Gold** and re-submitted
    - Transactions being rejected by **CrestEDG** will continue to submit until all business rules have been satisfied
    - **CrestEDG** does not report back to **Pro Gold i2** when a transaction is paid
  - iv. Any data changes to a transaction that has been marked **Paid in CrestEDG** must be done by contacting the **CrestEDG** help desk directly (**Will reject on submission**)

**Step 4:** Refer to [Knowledge Base Article 4208](#) for submission procedures or use the following link to access the article: <http://tkb.progoldi2.com/ShowArticle.aspx?tkbid=42081>

**Step 5:** Refer to [Knowledge Base Article 4090](#) for submission error procedures or use the following link to access the article: <http://tkb.progoldi2.com/ShowArticle.aspx?tkbid=40901>

**References:** Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

<http://secured.progoldi2.com/webcast.aspx>

- The Enhancement HelpNet links are located on the right side of the web page.

**Related articles:** 4085, 4086, 4087, 4088, 4089, 4090, 4091, 4092, 4093, 4094, 4161, 4162, 4191, 4200, 4208, 4217, 4219, 4220, 4224

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