



# Knowledge Base Article

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Agent Tools web site: [www.viewmylisting9ae.com](http://www.viewmylisting9ae.com)

**Article ID:** 4085  
**Subject:** Requirements for Successful Transmission of an Agent Record to CrestEDG  
**Last Modified:** December 13, 2010  
**Applies to:** Pro Gold i2 3.xx

**Purpose:** The CrestEDG Single Entry reporting process has checks built into it that must be satisfied before a record can be released to CrestEDG. One of the major items is the agent record. There are many fields within the agent record that must be addressed to satisfy the export process.

**Navigation:** Pro Gold Main Menu => Properties Tab => Agent Information Icon

**Procedure:** Actions required validating an agent record for submission to CrestEDG

- **Step 1:** Select the **Agent Information** icon and click the **New** button to create a new record
  
- **Step 2:** Minimum validation fields:
  - First Name
  - Last Name
  - Address
  - City
  - State
  - Zip
  - Email Address
  - Social Security Number
  - Office
  - Associate Title
  - A.T. Start Date
  - Associate Type
  - Birth Date
  - Brand Start Date
  - Gender
  - RE (Real Estate) Start Date
  
- **Step 3:** Key Person: If the agent also holds a key position within the office, then the “**Key Person Title**” and “**K.T. Start**” (Key Title Start Date) fields are also required
  
- **Step 4:** Reporting Status field:
  - Set to “Report to Crest” if the agent profile is to be sent to Crest
  - Set to “Do Not Report to Crest” if the agent profile should not be reported to Crest
  
- **Step 5:** Languages button: Allows the selection of languages that the agent can speak to appear on the crest brand website with the agent’s profile
  - Click the **Languages** button
  - Select a language from the dropdown

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- If the agent can speak more than one language, select the second language from the next dropdown that appears below the first
- Select all languages that the agent can speak/understand
- Click the **Save** icon
- Close the **Languages** selection screen
  
- **Step 6: Designations button:** Allows the selection of designations that the agent has received
  - Click the **Designations** button.
  - Select a designation from the dropdown
    - If the agent has more than one designation, select the second designation from the dropdown that appears below the first
    - Select all designations that the agent has received
  - Click the **Save** icon
    - Close the **Designations** selection screen
  
- **Step 7: Agent Profile**
  - **3 Profile areas: (1) Biography/Personal (2) Area of Expertise/Specializations (3) Testimonials/Other Awards**
    - Crest requires plain text only
    - Separate paragraphs within each profile area using two carriage returns only
  
- **Step 8: Activating/De-Activating**
  - **Activate:**
    - In CrestEDG: Enter date in **the A.T. Start Date** field in **General Tab** of **Agent Information** icon
    - In Pro Gold i2: Check the **Active** checkbox in **Commission Tab** of **Agent Information** icon
  - **De-Activate:**
    - In CrestEDG: Enter date in **the A.T. End Date** field in **General Tab** of **Agent Information** icon
    - In Pro Gold i2: Uncheck the **Active** checkbox in **Commission Tab** of **Agent Information** icon

**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:** 4084, 4086, 4087, 4088, 4089

**Keywords:** Agent, CrestEDG, Submission, 4085