



Knowledge Base Article

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Article ID: 4086
Subject: Requirements for Successful Transmission of a Listing Property Record to CrestEDG
Last Modified: April 10, 2009
Applies to: Pro Gold i2 3.xx

Purpose: The Crest 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 listing property record. There are many fields within the property record that must be addressed to satisfy the export process. These validations are required whether the property record is entered manually or is created by an MLS import process.

Procedure: Actions required to validate a listing property record for transmission to **CrestEDG**

- Minimum validation fields for listing only:
 - **Step 1: In Property Tab**
 - Property Address
 - City
 - State
 - Zip
 - List Date
 - Expiration Date
 - List Price
 - Property Status (Listing)
 - MLS #
 - Board Name
 - Features also feed to **CrestEDG** from Pro Gold i2
 - They are not required for a property to be accepted by **CrestEDG**, but Features will transmit
 - For more information on Features, see [Knowledge Base Article 4162](#)
 - Images and Virtual Tours also feed to Crest from Pro Gold i2
 - They are not required for a property to be accepted by **CrestEDG**, but Images and a virtual tour are required for a property to appear on the brand website
 - For more information on Images, see [Knowledge Base Article 4161](#)
 - For more information on Virtual Tours, see [Knowledge Base Article 4219](#)
 - **Step2: In Agent Tab**
 - Assign Agent
 - Assign Listing Side
 - **Step 3: In Buyer / Seller Tab**
 - Seller Name
 - Seller First Name
 - Seller Last Name
 - Seller Email address (if Seller Survey Delivery is Email)

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- **Step 4 Verify Business Rules before continuing to the Crest Tab**
 - Select **Save** button to invoke rule validation
 - Fix/Enter any violations from **Property/Agent/Buyer/Seller Tabs**
 - If only **Crest Tab** issues show, work them and select **Save** button when finished
- **Step 5: In Crest Tab**
 - Transaction Type
 - Property Code
 - Property Use
 - Seller Lead
 - Seller Lead Source
 - Seller Survey Delivery
 - Seller Entity Type
- Actions required if the listing goes to a Pending status:
 - **Step 1: In Property Tab**
 - Sale Date
 - Projected Close Date
 - Selling Price (Must be greater than zero)
 - **Step 2: In Agent Tab (if you have the selling side)**
 - Assign Agent
 - Assign Selling Side
 - **Step 3: In Buyer / Seller Tab (if you have the selling side)**
 - Buyer Name
 - Buyer First Name
 - Buyer Last Name
 - **Step 4: In Crest Tab (if you have the selling side)**
 - Buyer Lead
 - Buyer Source
 - Buyer Entity Type
- Actions required if the pending listing goes to a Canceled status:
 - There is a specific set of procedures for canceling a Pending listing transaction
 - Refer to [Knowledge Base Article 4089](#) for the detailed procedures
 - The button to the right of the **Property Status** field is used to create a new listing record and transfer the marketing and showing data from the old listing record to the new listing record

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, 4085, 4087, 4088, 4089, 4090, 4091, 4092, 4093, 4094, 4161, 4162, 4191, 4200, 4208, 4217, 4219, 4220, 4224

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