



Knowledge Base Article

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Article ID: 4087
Subject: Requirements for Successful Transmission of a Selling Side Only Property Record to CrestEDG
Last Modified: April 8, 2009
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 selling side only property record. There are many fields within the property record that must be addressed to satisfy the export process. A selling side only transaction will always be manually entered (Does not come from an MLS import).

Procedure: Actions required to validate a selling side property record for transmission to CrestEDG

- Minimum validation fields for selling side only (Co-Broke) transaction:
 - **Step 1 In Property Tab**
 - Property Address
 - City
 - State
 - Zip
 - Sale Date
 - Projected Close Date
 - Selling Price (Must be greater than zero)
 - Property Status (Pending)
 - MLS #
 - Board Name
 - **Step 2 In Agent Tab**
 - Assign Agent
 - Assign Selling Side
 - **Step 3 In Buyer / Seller Tab**
 - Buyer Name
 - Buyer First Name
 - Buyer Last Name
 - Buyer Email address (if Buyer Survey Delivery is Email)
 - **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 CrestEDG Tab**
 - Transaction Type
 - Property Code
 - Property Use
 - Buyer Survey Delivery
 - Buyer Entity Type

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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:

- Actions required if the pending co-broke transaction 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

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

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

Related articles: 4084, 4085, 4086, 4088, 4089, 4090, 4091, 4092, 4093, 4094, 4161, 4162, 4191, 4200, 4208, 4217, 4219, 4220, 4224

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