



# Knowledge Base Article

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**Article ID:** 4088  
**Subject:** Transmission of an Other Income (OI), Referral, or Rental Property Record to CrestEDG  
**Last Modified:** April 8, 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 other income property record. There are many fields within the property record that must be addressed to satisfy the export process. Other income transactions can be submitted for residential or commercial activity. **Note: Other Income, Referral and Rental transactions can only be processed via the selling side.** Other income transactions will commonly be entered manually (the record does not come from an MLS import); however, rental transactions may be fed into Pro Gold from an MLS import.

**Procedure:** Actions required to validate an other income, referral, or rental property record for transmission:

- Minimum validation fields (Note: These fields should be completed in the order listed below):
  - **Step 1: In Property Tab**
    - Property Address
    - Property Type (**Must be Other or Rental**)
    - Sale Date (Usually the date you receive the transaction information)
    - Projected Close Date (Usually the same as the Sale Date)
    - Sale Price (**Must be greater than zero:** Is usually the amount of the transaction being processed [Referral fee earned, BPO, Appraisal fee earned, etc...])
    - Property Status (Must be "Closed" to transmit)
  - **Step 2: In Agent Tab**
    - Assign Agent
    - Assign Selling Side
  - **Step 3: In Buyer/Seller Tab**
    - Buyer First Name
    - Buyer Last Name
    - Buyer Name
    - Buyer Email address (if Buyer Survey Delivery is Email)
  - **Step 4: In Comm. Tree Tab**
    - Gross Comm. (**Must be greater than zero:** Should be the amount entered as Sale Price)
    - Selling Side GCI (Should be the total of the amount entered as the Gross Comm.)
  - **Step 5: 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

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- **Step 6: In Crest Tab**
  - Transaction Type
  - Property Type
  - Property Use
  - Buyer Survey Delivery
  - Buyer Entity Type

**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, 4086, 4087, 4089

**Keywords:** Crest, Single Entry, Other Income, Submission, Rental, Referral, Property Record, OI, 4088