

Knowledge Base Article

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Article ID: 4095

Subject: **Pro Gold i2 Crest EDG Import Process**

Last Modified: August 21, 2009

Applies to: Pro Gold i2 3.xx

Purpose: The Crest EDG Import allows data to be brought into Pro Gold from Crest EDG. This is initially done to save entry in the setup process by populating Pro Gold XP with the Agent and Property history for the company. Normally, the Crest EDG Import is done from one computer and takes place at least once a day. The import can be run more frequently, if desired. It is ideal is use the same Crest EDG login every time the import is performed to ensure consistency of imported data.

Procedure: The first three steps set default options for the import and only need to be done the first time the import is setup.

Step 1: Setup Import Defaults

- a. Log into Pro Gold XP
- b. At Main Menu, select the Settings and Utilities option and click the Company Defaults icon
- c. Select the Misc Tab
- d. Verify/Assign the Initial Import Date is 01/01/1900
- e. Set the Import URL. The site for Crest EDG is started, but the XXX needs to be replaced with your brand name. (crestedg.century21.com, crestedg.coldwellbanker.com, or crestedg.era.com)
- f. Click Save and then click Done

Step 2: Install Crest schema files

- a. Each PC that will be used to do a Crest EDG Import must have the following steps accomplished prior to initiating an import for the first time:
 - i. Log into Pro Gold XP
 - ii. At Main Menu, select the MLS Interface option and click the Import / Export Utility icon
 - iii. Click the Update Import Driver button in lower left of Import Utility Selection screen
 - iv. Wait for transfer screen and extraction screen to finish
- b. Click OK to the "Finished updating driver" prompt

Step 3: Step 3 Run the Import

- a. Go to the Setup Tab
- b. At Main Menu, select the MLS Interface option and click the Import / Export Utility icon
- c. Select the Crest EDG option
- d. Click the Open button
- e. Verify the path at the top of the Data Import screen is c:\taro
- f. Click Retrieve Data (This will take you to the Crest EDG website)
 - i. Login to the Crest EDG site
 - ii. Select the Data Export option on the left side of the screen
 - iii. Select Data Export
 - iv. When the office selection screen appears, click Search
 - v. When the date screen appears, the date field may already be filled with the last date the export was
 - If this is the first time for the export, leave the date field blank or enter 01/01/1900 to include the history for your company in the export
 - vi. Crest EDG will compile the information for your company (he browser may appear to do nothing, but wait until the next screen appears)
 - vii. Click the Download Data link in the middle of the screen

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viii. A prompt may appear asking if you would like to Run or Save the file

- ix. Select Run to open the file
- x. When the WinZip screen appears, change the pathway on the left side of the screen to read c:\taro
- xi. Click Unzip
- xii. Click OK to the "53 files unzipped successfully" prompt
- xiii. Click Close to exit the WinZip screen
- xiv. Close the browser screen
- g. Click Import in the Pro Gold import screen to import the files
- h. Click Ok at the "Import Successful" prompt
- i. Click Done to close the import screen

Additional Information: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold XP 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: N/A

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