Knowledge Base Article

Article ID: **4135**
Subject: **Entering a Showing Record and Updating Co-op Agent Information**
Last Modified: **November 20, 2009**

Applies to: **Pro Gold i2 3.xx**

Purpose A showing record is entered under the **Work with Properties** icon on the **Properties Tab**. Showings are entered by property and found in the **Showings Tab** of each property. You can manage/change co-op agent's information (if the office they are currently in is Active) w/o interfering with the MLS import's control, by editing the co-op agent's information on the showing entry screen. You can either update the agent's information as you enter each showing event or if you have a list of agents to update open the showing entry screen and update the agents through the **Agent Name** field.

Procedure: Actions required to enter a showing record and update co-op agent information:

- At **Main Menu**, Select the **Transactions** option
  - Select **Work with Properties** icon
  - Use the **Find** button to retrieve the desired property record
  - Select **Showings Tab** of the property record to open the showings area
  - Click **New Showing** button at the bottom of the screen to open the **Add Showing** screen
  - Enter the showing details in the blank fields:
    - Double click in **Agent Name** field to search for and retrieve the desired agent:
      - If the agent is not in the list, select the **New Agent** button in the upper right corner of the search window to add the agent
      - If agent is in the list, retrieve the record and verify the information
        - **Note 1**: **Click Pencil icon to edit and update agent information**
        - **Note 2: Close the screen if you are only updating agent info**
    - **Showing Agent, Showing Company, Date**, **From**, and **To** are all required
    - Double-click in the **Date**, **From**, or **To** fields to access a tool for entering in the data
    - Select event **Status**
    - Click the **Save Showing** button in the lower right corner of the **Add Showing** screen to enter and save the showing record
    - The book icon allows notes to be entered on the showing
    - Notes are viewable by the seller on ViewMyListing.com
    - If you have ViewMyListing.com, be sure an email address is entered for the showing agent so that a feedback survey will be emailed automatically after the showing occurs
    - For those companies with ViewMyListing.com, click the **Sync** button in the upper right area to immediately send the new showing information to ViewMyListing.com
    - Can us the **Copy Showing** button (cursor must be in a field of the showing event to be copied) to search and retrieve another listing and the **Paste Showing** button to enter identical event in a different listing

- Showing instructions will be displayed at the bottom of the showings tab (**Note: They are entered via notes field in the properties tab of the property 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: N/A

Keywords: Appointment, Co-op Agent, Entry, Feedback, Showing Agent, Showings Record, 4135