



Knowledge Base Article

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Article ID: 4171
Subject: Recommended Tasks to be Completed Prior to the First Crest EDG Import in Pro Gold i2
Last Modified: June 18, 2008
Applies to: Pro Gold i2 3.0

Issue: The Crest EDG Import allows data to be brought into Pro Gold i2 from Crest EDG. This is initially done to save entry by populating Pro Gold i2 with the Agent and Property history for the company. Before the import can be run for the first time, there are several items that should be setup.

Resolution: It is highly recommended that the following items be setup prior to running the Crest EDG import for the first time:

- Setup Crest EDG Import Defaults (This step sets defaults for the import and only needs to be performed once.)
 - Select the **Setup Tab** and click on **Change Company Info**
 - Select the **Misc** tab
 - Verify/Assign the "Initial Import Date" is 01/01/1900.
 - 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)
 - Click **Save** and then click **Done**.
- Setup Default Progress Report Activity
 - The Default Progress Report Activity sets a list of progress report activities that will be automatically added to new properties. This is important to be setup before the first Crest EDG Import because the items in the Default Progress Report Activity list will be added to the properties that are brought into Pro Gold i2 from the Import.
 - Under the **Setup Tab**, select **Change Company Info** and click on the **Lists 1** tab.
 - The Default Progress Report Activity list is in the bottom left corner of the screen.
 - Separate lists can be created for the different property types (Ex: Residential, Commercial, etc.).
 - Make sure that the activities listed apply to all properties of a certain type. (For example, if all residential properties are listed in the MLS, then add that as a default activity.)
 - Note: Items can be added to the "Media" and "Activity" drop-downs by double-clicking in either field and adding a new entry to the list.
- Setup Chart of Accounts
 - Under the **Accounting Tab**, select the **Accounting** icon.
 - The default Chart of Accounts can be used as is or modified by double-clicking on an account and making changes to the information.
 - More details on setting up the Chart of Accounts can be found in the Pro Gold i2 user guide or in the Topic 1 training session/video.
- Setup Bank Accounts
 - Under the **Banking Tab**, select **Bank Accounts**.
 - Setup a bank account by entering the "Bank Account Number" and "Bank Name" and selecting the "Account Type" and "Default GL Cash Account".
 - Create as many accounts as needed, but make sure each bank account has its own "GL Cash Account" number.
 - More details on setting up Bank Accounts can be found in the Pro Gold i2 user guide or in the Topic 2 training session/video.

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- Set Default Bank Account
 - Under the **Setup Tab**, select **Change Company Info**.
 - In the middle of the screen is a field to select the "Default Bank Account".
- Set Agent Commission Expense Account, Commission Checking Account, Default Commission Percent, and Default Escrow Banking Account.
 - Under the **Setup Tab**, select **Change Company Info** and click on the **Default 2** tab.
 - Set the "Agent Commission Expense Account" to the General Ledger account that will most commonly be used for the Agent Commission Expense (Changes to the account selection for individual agents can be made under Agent Information in the Properties tab).
 - Set the "Commission Checking Account" to the bank account that will most commonly be used for processing commission (Changes to the account selection for individual agents can be made under Agent Information in the Properties tab).
 - Set the "Default Commission Percent" to the percent most commonly used to calculate the gross commission (The commission percent can be changed for individual properties in the Comm. Tree tab of the property).
 - Set the "Default Escrow Banking Account" to the bank account that will most commonly be used for monies in Escrow (The account can be changed for individual properties in the Escrow tab of the property).
 - More details on setting up the defaults can be found in the Pro Gold i2 user guide or in the Topic 2 training session/video.
- Setting up the items listed above in Pro Gold i2 make sure that Pro Gold i2 is ready for the first Crest EDG import. The Crest EDG Import allows data to be brought into Pro Gold i2 from Crest EDG. This is initially done to save entry by populating Pro Gold i2 with the Agent and Property history for the company.
- For those that are participating in SingleEntry, refer to [Knowledge Base Article 4096](#) for more information on preparing for SingleEntry.
- For instructions on running the **Crest EDG Import**, see [Knowledge Base Article 4095](#).

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: 4096, 4095

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