

## Knowledge Base Article

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Agent Tools web site: [www.viewmylisting9ae.com](http://www.viewmylisting9ae.com)

**Article ID:** 4217  
**Subject:** Transmission of an Employee Key Person Record to Crest  
**Last Modified:** October 9, 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 employee key person record. Note: Only key person employee records need to be reported to Crest. If an employee record is not a key person, the record must be set to 'Not Report to Crest'. Employee records can be used for reporting to CrestEDG a **key person that is not an agent** (Typically W2 employees). There are many fields within the employee record that must be addressed to satisfy the export process.

**Procedure:** Actions required to validate an employee record for transmission to CrestEDG

- **Step 1: Create employee record**
  - At **Main Menu => Accounting => Employees => Employee Setup** icon
  - Employee records are located in the **Employee Setup** icon of the **Employees** menu option
  - To create a new employee record:
    - Select the **Employee Setup** icon
    - Click the **New** button to create a new record
- **Step 2: Complete minimum validation fields:**
  - First Name
  - Last Name
  - Hire Date
  - Birth Date
  - Office
  - Social Security Number
  - Address
  - City
  - State
  - Zip
  - Email Address
  - Key Person Title \*
  - Key Start Date \*
  - Brand Start Date \*
  - Familiar Name \*
  - Gender \*
  - Printed Name\*
  - RE (Real Estate) Start Date\*
  - \* Crest unique fields
- **Step 3: Report record/Do not Report record to Crest**
  - Set the **Report to Crest** field to "**True**" if the **key person** profile is to be sent to Crest
  - Set the **Report to Crest** field to "**False**" if the **key person** profile should not be reported to Crest
- **Step 4: Languages** button: Allows the selection of languages that the employee can speak to appear on the crest brand website with the employee's profile
  - Click the **Languages** button
  - Select a language from the dropdown

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- If the employee can speak more than one language, select the second language from the next dropdown that appears below the first
- Select all languages that the employee can speak/understand
- Click the **Save** button
- Close the **Languages** selection screen
  
- **Step 5: Designations Button:** The Designations button allows the selection of designations that the employee has received
  - Click on the **Designations** button
  - Select a Designation from the drop-down
    - If the employee has more than one designation, select the second designation from the drop-down that appears below the first
    - Select all designations that the employee has received
  - Click the **Save** button
  - Close the Designations selection screen
  
- **Step 6: Activating/De-Activating**
  - **Activate:**
    - **In CrestEDG:** Enter date in the **Key Start Date** field in the **Employee Tab** of the **Employee Setup** icon of the **Payroll Tab**
    - **In Pro Gold i2:** Click the **In-Active** button (Toggle it to **Active**) in the upper right of the **Employee Tab** of the **Employee Setup** icon of the **Payroll Tab**
  - **De-Activate:**
    - **In CrestEDG:** Enter date in the **Key End Date** field in the **Employee Tab** of the **Employee Setup** icon of the **Payroll Tab**
    - **In Pro Gold i2:** Click **Active** button (Toggle it to **In-Active**) in the **Employee Tab** of the **Employee Setup** icon of the **Payroll Tab**

**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, 4088, 4089

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