



Knowledge Base Article

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Search Local Classifieds – www.viewmylisting.com/buy-sale-trade
Agent Tools web site: www.viewmylisting9ae.com

Article ID: 4233
Subject: How to Inactivate an Agent Record
Last Modified: April 16, 2009

Applies to: Pro Gold i2 2.xx, 3.xx

Summary: The Agent Record is managed in Pro Gold i2. Once an agent is added to Pro Gold i2, it cannot be deleted. Agents can be de-activated when they are no longer with the company or the record is not to be used in Pro Gold. Agent records are needed in Pro Gold to maintain referential integrity of the data. The Inactive records also provide an audit trail of any past history the agent may have. Inactive agents do not appear on daily reports or lists. An agent record can be re-activated if the agent returns to your company or temporarily re-activated to provide agent history in reports.

Procedure: Actions required to de-activate an agent record in Pro Gold i2 are provided below:

Step 1: Log into Pro Gold

Step 2: 3.xx users: **Main Menu => Transactions => Agents and Offices => Agent Information** icon
2.xx users: **Main Properties Tab => Agent Information** icon

Step 3: Use the **Find** button at the bottom of the screen to locate and select a particular agent

Step 4: Select the **Commission Tab** at the top of the screen

Note: 2.xx users must select the **General Tab** and remove the checkmark in the **Active** checkbox located in the right middle area of the screen

Step 5: Click on the **Active** checkbox at the bottom of the screen to remove the checkmark

Step 6: For **Realogy Single Entry Users only**, to also remove the agent from Crest, follow the rest of the instructions under this step before going to **Step 7**, for all others, continue to **Step 7**

- a. Click on the **General Tab** at the top of the screen
- b. Then, enter a date in the **A. T. End** (Associate Title End date) field
- c. If the agent also holds a key position within the office, then the **K.T. End** (Key Title End date) field is also required

Step 7: Click the **Save Agent** button at the bottom of the screen to save the changes

Step 8: Click the **Done** button to close the Agent Information 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 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.

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2 of 2