Knowledge Base Article

Article ID: **4263**
Subject: **Transition to New Graphical User Interface (GUI) Menu and Adding Reports for User Accounts**

Last Modified: **July 31, 2009**

Applies to: **Pro Gold i2 3.xx Version 3.09.0601**

Purpose: To help Pro Gold XP users transition to Pro Gold i2. Pro Gold i2 Version 3.09.0601 implemented a new GUI menu system. Also, report access is handled differently in Pro Gold i2.

Procedure: Listed below is a comparison of the new menu system to the old menu system to facilitate transitioning to the new GUI menu. Also provided below, are instructions for handling missing reports on user accounts due to the enhanced report security implemented in Pro Gold i2.

- **Step 1: New vs Old Menu:**

New Menu	Old Menu
Welcome	N/A
Transactions	Properties Tab
Leads Management	Contacts Tab
Banking and Escrow	Banking Tab
Accounting	Accounting Tab
Accounting => Customers	Receivables Tab
Accounting => Vendors	Payables Tab
Accounting => Employee	Payroll Tab
Franchise Interfaces	Franchise options: (Crest, Weichert, etc...)
MLS Interface	Import / Export Utility icon
Settings and Utilities	Setup Tab
ViewMyListing.com	ViewMyListing.com icon

- **Step 2: Report Security in Pro Gold i2:**

  - A Pro Gold user account (Non Super account) must have reports assigned to them in Pro Gold i2
  - A person with Super access must do the assignment
  - Please use the link provided in this e-mail to access (Knowledge Base Article (KBA):

    http://tkb.progoldxp.com/ShowArticle.aspx?tkbid=42051

    Article ID: 4205
    Subject: Missing Pro Gold Reports

 The article contains the instructions for assigning reports to a user account.

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: GUI, New Menu, Old Menu, Report, Access, Missing Reports, 4263