



Knowledge Base Article

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Article ID: 4268

Subject: Verify/Update an Office Record

Last Modified: October 15, 2009

Applies to: Pro Gold i2 3.xx

Purpose: Provide users instructions how to update their company office record in Pro Gold i2.

Procedure: Listed below are the steps to modify an office record.

Offices are managed via the **Offices** icon.

- **Step 1:** To access the **Offices** icon, do the following:
 - At the **Main Menu**, select the **Transactions** option
 - Select the **Agents and Offices** option
 - Click on the **Offices** icon

- **Step 2:** To verify/update your office record(s):
 - Click the **Find** button
 - Click the dropdown box in the **Office Type** field and select **Non Co-op** option
 - This will filter the Find view so that only Non Co-op offices should be visible (Of which yours should be)
 - Locate and retrieve your office record and verify the information in it
 - Highlight office desired in list and click the **Retrieve** button or double click the line item to retrieve the record
 - The red **Name** field contains the office name; make changes as needed
 - Update other office information as needed
 - Click the **Save** button and retrieve another record to continue updating or **Done** button to exit

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: Offices, 4268

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