



# Knowledge Base Article

Free Download Real Estate Software - ProGold i2 web site: [www.progoldi2.com](http://www.progoldi2.com)  
Real Estate Search Engine - ViewMyListing.com web site: [www.viewmylisting.com](http://www.viewmylisting.com)  
Search Local Classifieds – [www.viewmylisting.com/buy-sale-trade](http://www.viewmylisting.com/buy-sale-trade)  
Agent Tools web site: [www.viewmylisting9ae.com](http://www.viewmylisting9ae.com)

**Article ID:** 4274

**Subject:** Check for Duplicate Agent Record in Pro Gold i2

**Last Modified:** October 29, 2009

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

**Purpose:** Provide users instructions for how to verify if they have more than one agent record in Pro Gold i2 for an agent.

**Procedure:** Listed below are the steps to search the agent records for a duplicate record:

- **Step 1:** Do the following to search agent records:
  - Login to Pro Gold i2
  - At the **Main Menu**, select the **Transactions** option
  - At **Transactions** menu, select **Agents and Offices** option
  - Click the **Agent Information** icon
  - Click the **Find** button at bottom of the **Agent Setup** screen
  - Select the **All** option in the filter box in upper right of the **Find Agents Dialog** screen
    - **Note:** Default search option is **Active** agents only
  - Type the last name of the person in the search field at bottom of dialog screen and see if more than one record shows up that belongs to the person in question
  - If not, search by first name
  - If you find two or more records for the agent, go to **Step 2**
- **Step 2:** Audit each agent record and determine which one to use:
  - Retrieve each record
  - Review each
  - Determine which one to use
  - Activate the record you want to use and de-activate the record you don't want to use:
    - **Activate:**
      - In CrestEDG: Enter date in the **A.T. Start Date** field in **General Tab** of **Agent Information** icon
        - Set to "**Report to Crest**" if the agent profile is to be sent to Crest
      - In Pro Gold i2: Check the **Active** checkbox in **Commission Tab** of **Agent Information** icon
    - **De-Activate:**
      - In CrestEDG: Enter date in the **A.T. End Date** field in **General Tab** of **Agent Information** icon
        - Set to "**Do Not Report to Crest**" if the agent profile should not be reported to Crest
      - In Pro Gold i2: Uncheck the **Active** checkbox in **Commission Tab** of **Agent Information** icon

**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:** Activate, Agent Record, De-activate, Duplicate, 4274

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