



## Operation of the REAL/Easy BOS Realogy Crest Data Import

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1-800-732-5327

## **Welcome to BOS' Crest Data Import App**

For REAL/Easy customers who are entering their listings and open sales into Crest EDG, REAL/Easy's Crest Update module can save time of double entry. This module will import new listings and sales that are exported from Crest EDG.

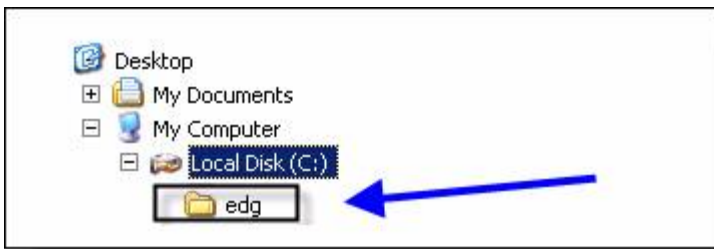
This is a two step process:

1. Crest EDG is used to export the listings and sales into a file.
2. REAL/Easy's Crest franchise module is used to read in the new listings and sales from the export file.

After creating a folder in which to place the export file, the two steps are used as frequently as desired to eliminate the duplicate entry of listings and sales. The following pages detail these steps.

Starting with Page 9, you can learn about special features that enable viewing and editing of new listings and sales that have just been imported fro Crest EDG.

## Operation Steps



Using “My Computer”, make a folder on your hard drive for the Crest data that you will download. We prefer just naming the folder “edg”.

So the location of the folder is “C:\edg”

### Step 1. Creating the Export file from Crest EDG



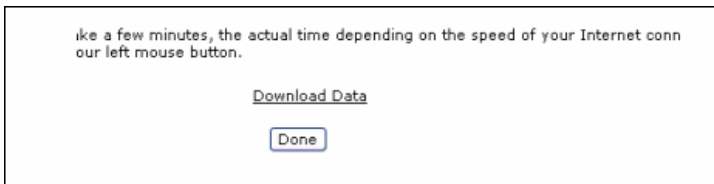
Login to Crest EDG, go to “Data Exports” from the home page and click on the “Data Exports” sub menu.



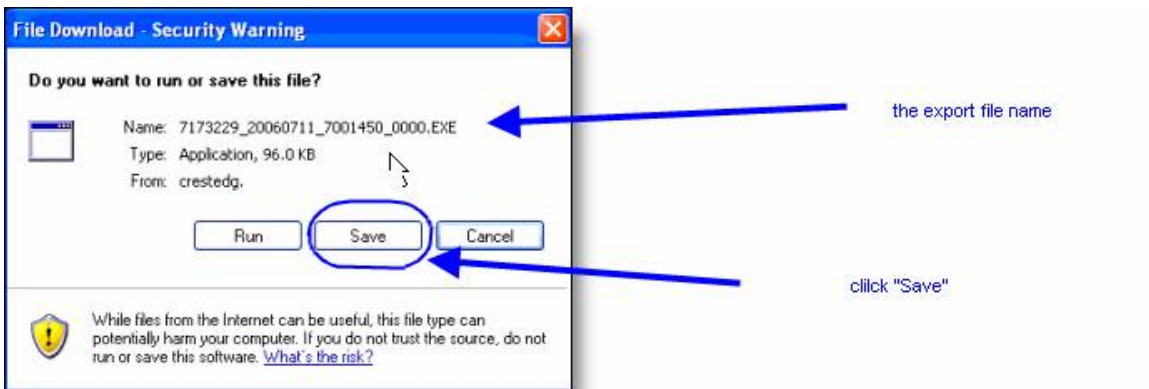
You should receive the “Broker Data Exports” screen above. Set the office selection to “All” and then click the “Search” button.



This shows the date of your last download. Normally you would not change this. Click on Search. This will begin the export file creation on the Crest EDG server.

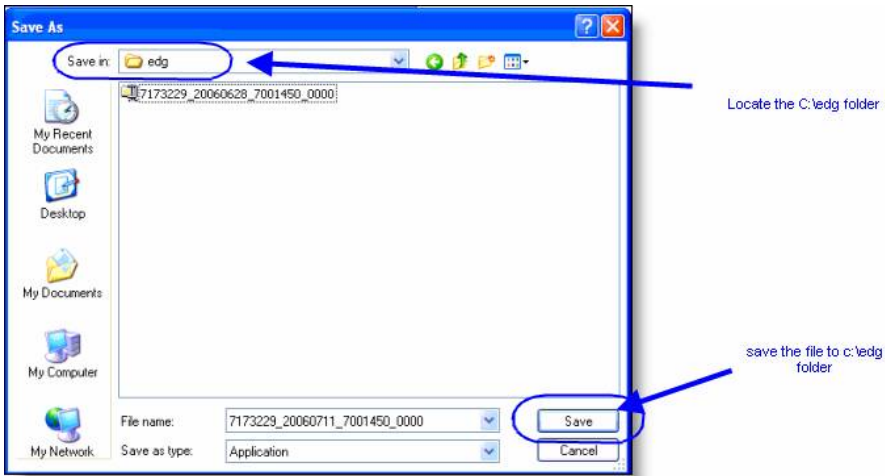


When Crest EDG is finished building the file click on **Download Data**.



Click on Save

(note: this is a zip file – you do not have to expand it – just do save. CrestEDG assigns a 4 part file name – the second part is today’s date e.g. “20060711” would be July 11, 2006)

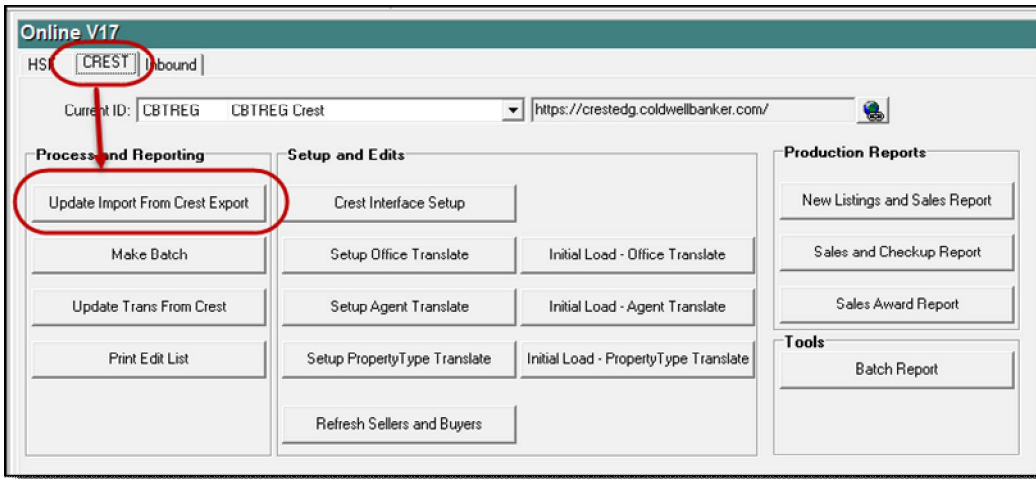


Find your EDG folder and Save the file.

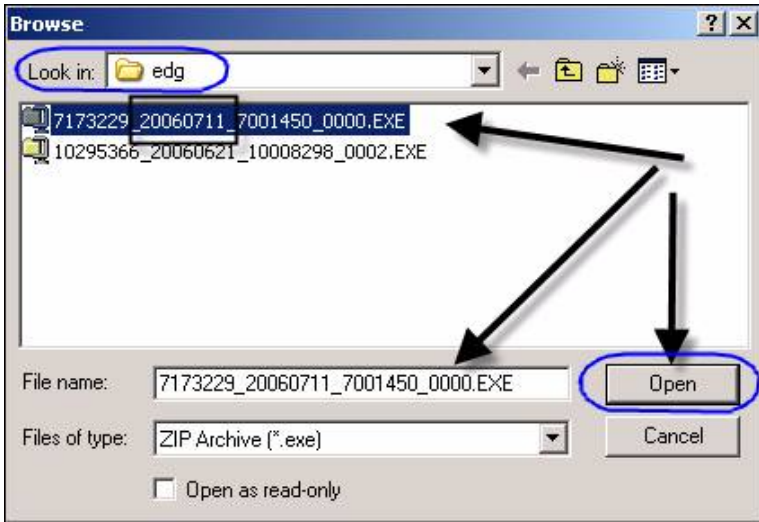
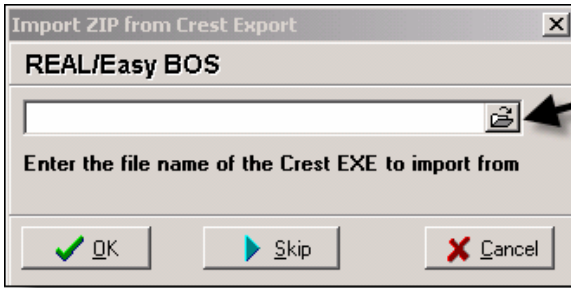
## Step 2. Update REAL/Easy from the export file.



Login to your REAL/Easy BOS system



Click on Online module, then the “Crest” tab. On the Crest tab click on ‘Update from Crest Export’.

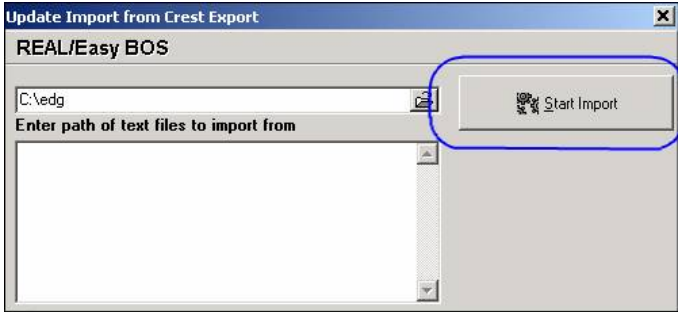


When you see the Enter File Name window, click on the browse feature.  
Find the EDG folder and click on the file with the latest date in it. Then click on Open.

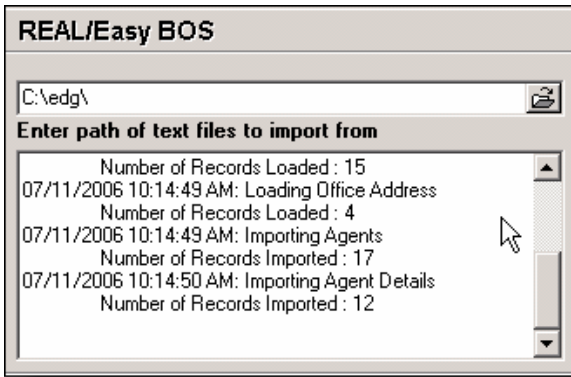
(note: the second part of the file name shows the export date (year month day)).



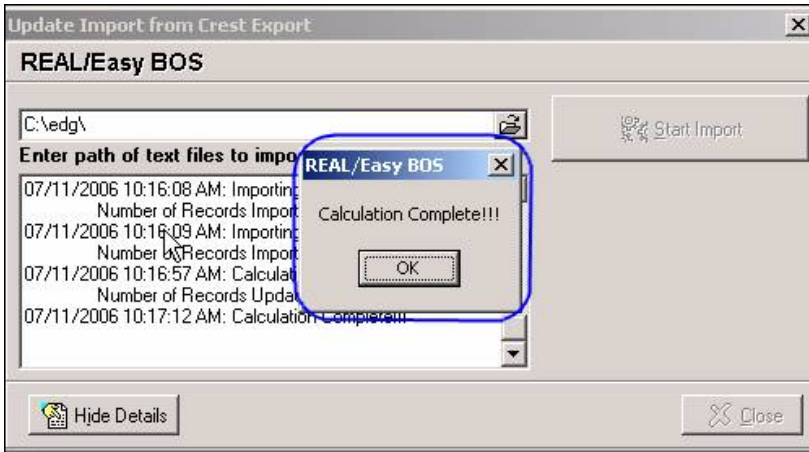
The file name is filled in. Click on OK



The above processing window should appear – it re-displays the folder containing the import file. Click the “Start Import” button to begin processing.



Above, The import is running. This process should only take a minute or two.



Click OK when the “Calculation Complete” message appears.

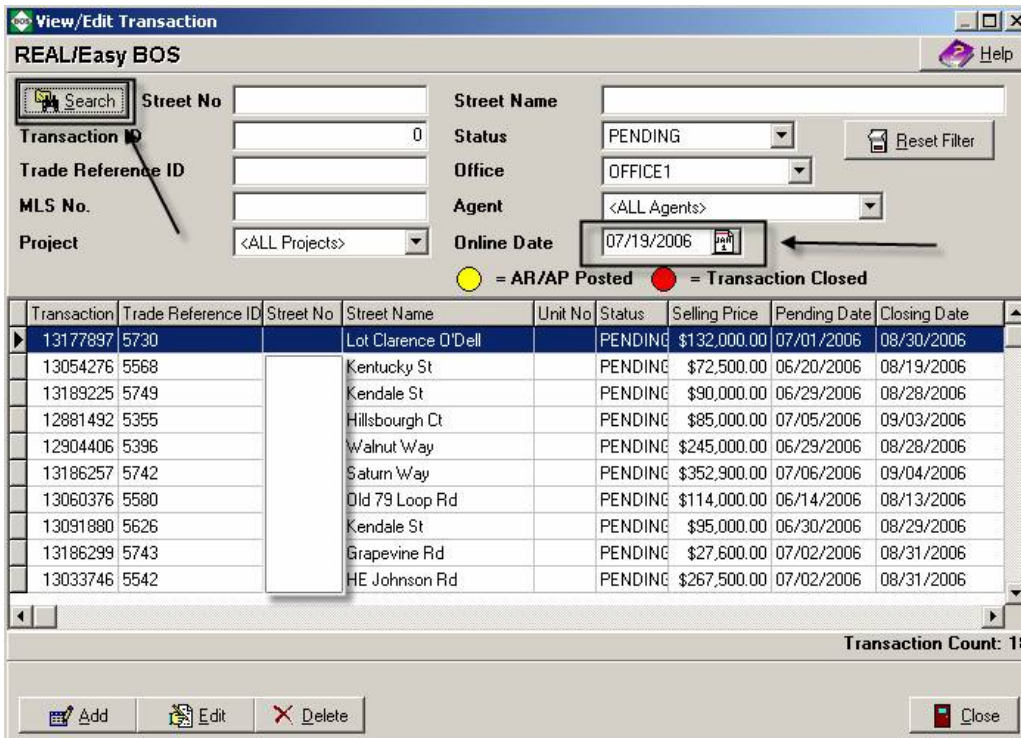
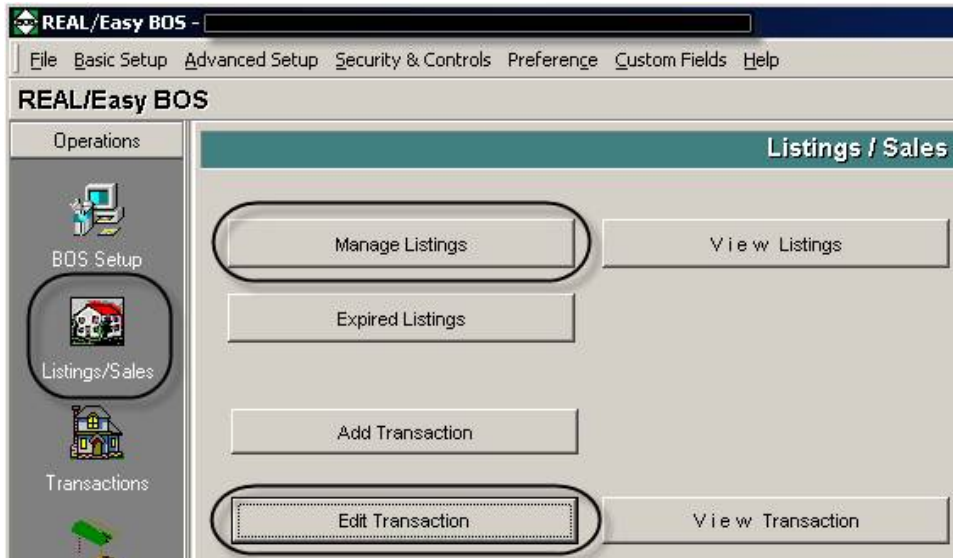




Close this window and Close and then Exit and Restart REAL/Easy BOS.

Step 2 is completed.

## Viewing Sales and Listings added from Crest EDG



To view, and perhaps edit new transactions, go to Edit Transaction and search for what was updated from the online CrestEDG system for any given day that the update was run. This date is called the “Online Date” and can be entered on the View/Edit Transaction search screen as illustrated above.

Property	Demographics	Listing/Selling Co-Broker	Contacts	Commissions	Trust	Notes
District	<None>					
Buyer Source	<None>					
Seller Source	<None>					
Finance Type	<None>					
Custom 1	<None>					
			<b>Online</b>			
			Transaction Type:	1	1 Transaction, including TRP & TRA types	
			Status Code:	OP	Open/Pending	
			Property Type:	1	Resale -Single Family Detached	

REAL/Easy BOS will keep track of the latest “Online” CrestEDG status’, transaction type, and property type codes based on your last update. You can view this within a transaction by clicking on the “Demographics” tab.

Note that Transaction Type “1” in EDG which is “1 Transaction, including TRP & TRA types” converts to the one of the three sales types in BOS of:

- “FL-FS” (FirmList – FirmSale – inhouse),
- “FL-CS” (FirmList - CoBrokerSale,
- or “CL-FS” (CoBrokerList – FirmSale)

Status Code “OP” in EDG converts to “Pending” in BOS

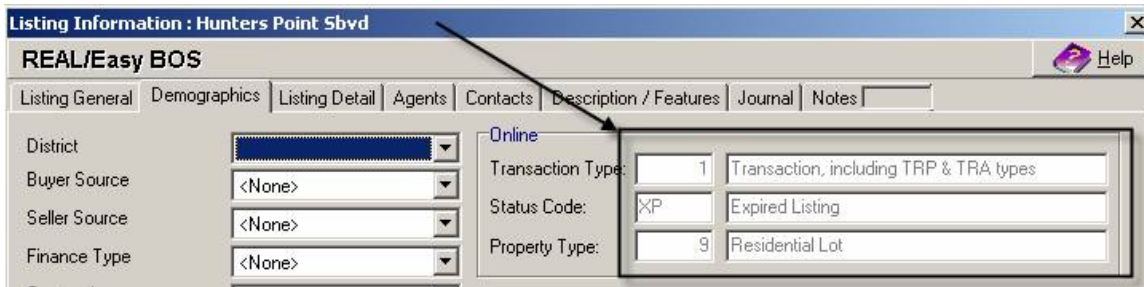
The EDG Property Type’s are identical in BOS, e.g. “Resale-Single Family Detached” in BOS

Note also that if your company has the practice of inserting other CA3 – Off The Top allocations, that this would have to be done with each newly added transaction.

Searching and viewing new listings is now available in the Manage Listings search screen and within each listing's "Demographics" tab – see below:



In "Manage Listings" select the Online Date and Search what was imported that day.



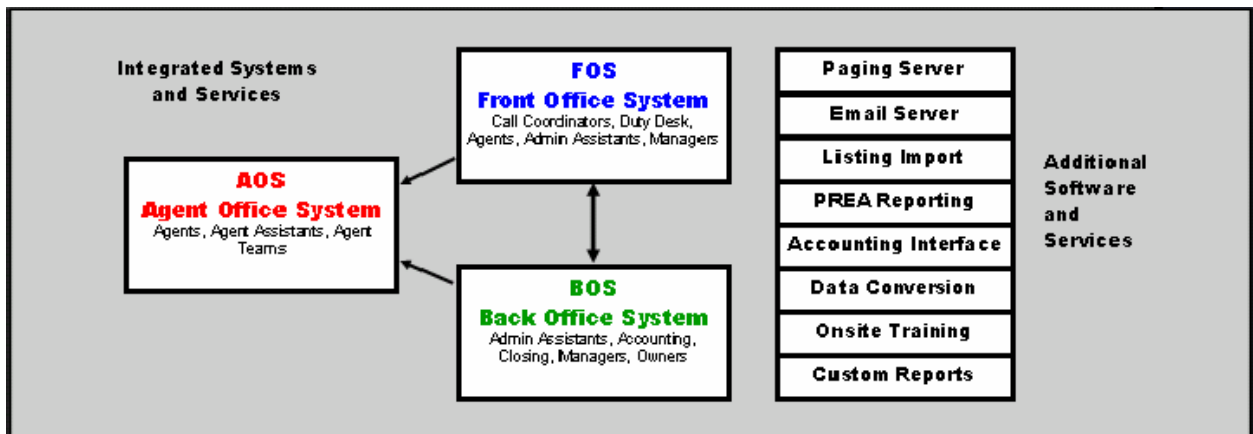
Example above, you can click the Demographics tab of an Expired Listing to display the online status, e.g. "XP", coming in from Crest EDG.





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