

## Pro Gold XP 3.0 Training Session Outline

Date Trained	Topic Completed	Participant(s)	User Manual Pg #	Topic	Topic Description
					<b>Orientation</b>
					Overview of Topics, Responsibilities, & Training Schedule
					Ordering Checks
				<b>Topic 1</b>	<b>System Setup</b>
			Pg 2		Set Financial Periods
			Pg 3-6		Chart of Accounts Setup
			Pg J-1		Default Seller Progress Report Activity
				<b>Topic 2</b>	<b>Bank Account Setup / Misc</b>
			Pg 23-24		Bank Account Setup
			Pg 23-24, L-1		Main Operating/Escrow Checkbook(s)
			Pg 7-9		Database Default Settings
			Pg 11-13		Commission Plan Setup
				<b>Topic 3</b>	<b>Agent Setup</b>
			Pg 16-17		Agent Deductions
			Pg 14-15		Company Deductions
			Pg 10		Office Setup
			Pg 18-22		Agent Setup
			VML User Guide		Agent Settings in ViewMyListing.com (VML)
			Pg 102-103		Crest Import EDG (For Realogy Clients only)
				<b>Topic 4</b>	<b>Properties - Listings and Pendings</b>
			Pg 36-39		Enter Properties
			Pg 36-37		Property
			Pg 38		Agent
			Pg 38		Buyer/Seller
			Pg 38		Escrow (brief overview)
			Pg 90-92		Marketing/Batch Marketing
			F-1		Check List
					Document Storage
			VML User Guide		Properties in ViewMyListing.com (VML)

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				<b>Topic 5</b>	<b>Properties - Showings</b>
			Pg 94-96		Entering a Showing
			Pg 95		Adding a Showing Agent
			Pg 95		Adding a Coop Office
			VML User Guide		Showings in ViewMyListing.com (VML)
				<b>Topic 6</b>	<b>Agent Productions/Starting Balances</b>
			Pg 40		Creating Production History
			Pg 40		Bulk Property Entry
					Reports to Verify
				<b>Topic 7</b>	<b>Accounts Payable</b>
			Pg 34-35		Creating Vendors
			Pg 73-74		Enter a bill/ Vendor Beginning Balances
			Pg 75-79		Paying a bill(s)
				<b>Topic 8</b>	<b>Accounts Receivable</b>
			Pg 50-59		Establishing Agent A/R Beginning Balances
			Pg 53-54		Creating Agent Recurring Charges
			Pg 54		Create Agent Invoices
			Pg 57		Credit Memo
				<b>Topic 9</b>	<b>Accounts Receivable</b>
			Pg 54		Charge Agent
			Pg 60-66		Receive Payment
			Pg 58-59		Print Invoices
			VML User Guide		Invoices in ViewMyListing.com (VML)
				<b>Topic 10</b>	<b>Closing a Transaction</b>
			Pg 41-49		Processing a Closing
			Pg 45-46		Commission Tree
			Pg 47-48		Processing Commission Check
					Printing Cash Disbursement Statement
					Closing Information in ViewMyListing.com (VML)

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				<b>Topic 11</b>	<b>Payroll Setup</b>
			Pg 67		Payroll Tax Setup
			Pg 69		Payroll Earnings & Deductions
			Pg 67-68		Employee Setup
			Pg 68		Earnings
			Pg 68		Deductions
			Pg 68		Vacation Tracking
			Pg 69		Starting Balances
				<b>Topic 12</b>	<b>Processing Payroll</b>
			Pg 70-72		Processing Payroll
			Pg 70-71		Calculating Time Cards
			Pg 71-72		Printing Payroll Checks
					Payroll Reports
				<b>Topic 13</b>	<b>Establishing Escrow Checkbook Balance</b>
			Pg 26, C-1		Establish Escrow Starting Balances
			D-2		Create an Escrow Check
			D-1		Create an Escrow Deposit
			D-2		Create an Escrow Adjustment
			D-1 & 2		Posting Transaction to General Ledger
			D-3		Reports
				<b>Topic 14</b>	<b>Establishing Operating Checkbook Balance</b>
			Pg 26		Establish Operating Starting Balances
			Pg 31-33		Create Checks
			Pg 29-30		Create Deposits
			Pg 27-28		Create Adjustments
					Posting Transaction to General Ledger
				<b>Topic 15</b>	<b>Reconciling your Checkbook(s)</b>
			Pg 80-84		Bank Reconciling
					Reconciliation Reports

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				<b>Topic 16</b>	<b>Contact Manager Professional</b>
			K-1		Sources of Call setup
			Pg 97		Contact Type Setup
			Pg 97		Outbound Call Plan Setup
			Pg 97-99		Entering a New Contact
			Pg 99		Entering Call History
			Pg 100		Assigning a Contact to an Agent
			Pg 101		Tickler
			VML User Guide		Contacts in ViewMyListing.com (VML)
				<b>Topic 17</b>	<b>Letters</b>
			B-1, C-1		Creating Letters
			B-1, C-1		Printing Letters
			Pg 85-93		White Paper Seller Progress Reporting
				<b>Topic 18</b>	<b>Database utilities</b>
			Pg 1		Backup / Compacting and Repairing
			Pg 8, G-1		Security
			Pg 8		User access to Pro Gold
			G-1		Manage access to Reports
					ViewMyListing.com (VML) Sync
			Pg 102		MLS Import (if applicable)
				<b>Topic 19</b>	<b>General Ledger Beginning Balances</b>
			H-1		Posting General Ledger Beginning Balances
					Module Batch Posting
			A-1		Printing Financials (Income Statement)
			A-1		Printing Financials (Balance Sheet)