

# NRDS Integration Training



# Agenda

Overview

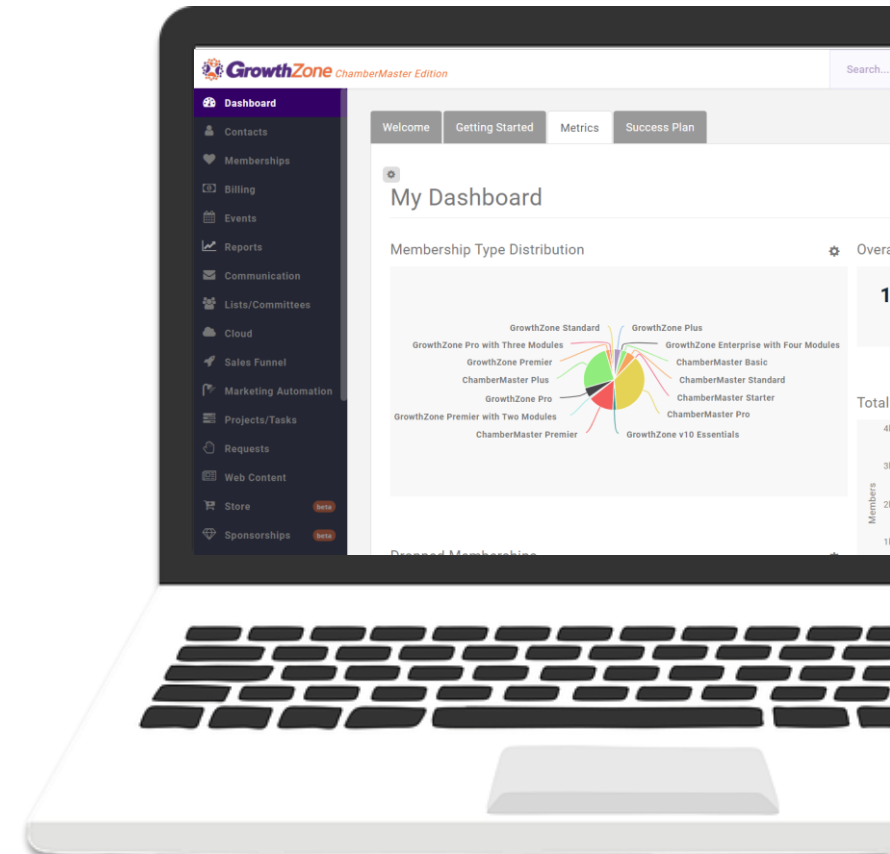
Initial Setup Considerations

Working with Offices

Working with Agents

Working with Code of Ethics (COE) Training

Reviewing the Event Log



The GrowthZone integration with the National Association of REALTORS' NRDS database provides association staff an easy way to manage their contacts' NRDS data

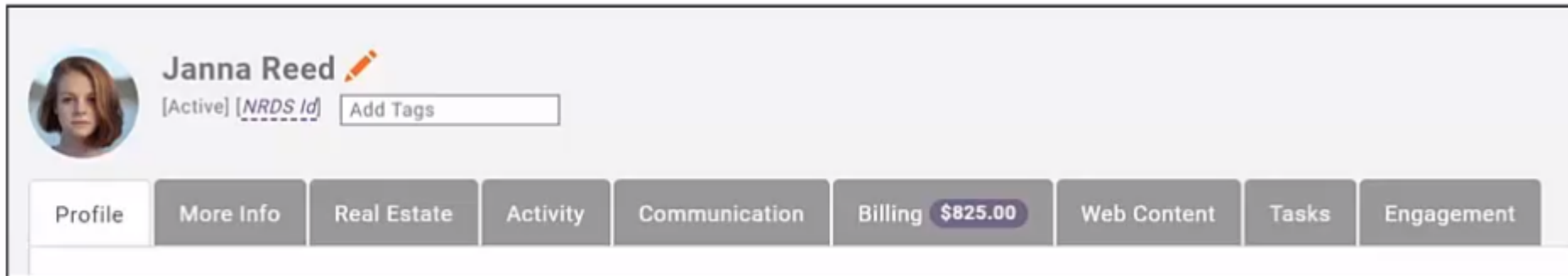
Select data entered or changed in GrowthZone is automatically pushed to NRDS, thereby updating agent and office records in from one central location

Data is pushed every ten minutes to ensure your records in NRDS are always up to date

# Initial Setup Considerations

Do you wish to tie Account Number to NRDS ID?

- GrowthZone tracks account number for all your agents and offices
- You can choose for this account number to be the NRDS ID
- Or you can use this field to track other account number if applicable



The screenshot shows a user profile card for Janna Reed. On the left is a circular profile picture. To the right of the picture, the name "Janna Reed" is displayed with a pencil icon for editing. Below the name, the status "[Active]" is shown, followed by the text "[NRDS Id]" which is underlined. To the right of this text is an "Add Tags" input field. Below the profile information is a horizontal navigation bar with several tabs: "Profile" (highlighted), "More Info", "Real Estate", "Activity", "Communication", "Billing" (with a badge showing "\$825.00"), "Web Content", "Tasks", and "Engagement".

# Initial Setup Considerations

## NRDS Starting Number

- If you are the POE for an agent or office, you will have the ability to assign unique NRDS ID's
- To ensure that you continue your sequence of ID's, GrowthZone will set your starting number

# Initial Setup Considerations

Do you wish to tie Membership Status to NRDS Status?

- If you wish the system to automatically update the NRDS status when membership is dropped, suspended or reactivated you will do this during initial setup



The screenshot shows a web interface for "Real Estate Settings" with a "Beta" badge. The main heading is "Real Estate Membership Integration Settings" with an "Add" button. Below is a table with columns for "Membership Name", "Suspend", "Reactivate", "Drop", and "Actions".

Membership Name	Suspend	Reactivate	Drop	Actions
Realtor Membership	MLS: S Lock Box: Suspended NRDS: Inactive	MLS: A Lock Box: Valid NRDS: Active	MLS: I Lock Box: Suspended NRDS: Inactive	 

# Add Offices

Although Offices are not "members" of the Realtor organization (the Realtor association is an individual member organization), the Office record must exist because each member must be linked to an office

Contact information (i.e. addresses, phone number, etc.) and NRDS specific information is synchronized to NRDS (Status, Office, DR, etc.)

WIKI: [Data Sent to NRDS for Offices](#)

## The following transactions can be performed via GrowthZone:

- **Add** tells NRDS to Add the record. NOTE: If NRDS finds an office record already exists with the same Office ID it will process the Add as a Change without the necessity of sending the record again.
- **Change** tells NRDS to Change the record. If NRDS finds that an office record does not already exist by checking the Office ID it will process the Change as an Add without the necessity of sending another record.
- **IMPORTANT: TRANSFERS MAY NOT BE PERFORMED VIA GROWTHZONE – IF NECESSARY, YOU WILL NEED TO DO THIS IN NRDS...**



## Follow the rules!

GrowthZone simply passes data on... you must follow the same rules you would follow if you are entering offices directly into NRDS:

- A DR is required when entering an office in NRDS. And a DR must be associated to an Office before it can be entered into NRDS 😞.
- Point of Entry (POE) restrictions apply. Only the POE for an office/agent can add or change the record. If you are not the POE and attempt to add/change a record NRDS will reject this
- You can not sync records to NRDS if the office is inactive in NRDS. You will need to access NRDS directly to activate the member (first pass only, once this is done, you will be able to manage records via GrowthZone)
- If a records already exists in NRDS and you are attempting to add, NRDS will process this as a Change
- Ensure all required fields are populated, and formatted correctly

# Search NRDS for Office

Prior to adding a Primary Office or Secondary Office record, best practice is to search the NRDS database to prevent duplication

WIKI: [Search NRDS Database for Office](#)

### Search/Add Office

Search below for existing Offices in NRDS Central database. Results will be displayed below and if a match is selected, data will be populated directly from NRDS. Adding more information to your search criteria can help increase the accuracy of the search results that will display.

Office NRDS ID	Office Name	State	City	Office DR Last Name	Search NRDS
<input type="text"/>	Southernly Realty	CO	<input type="text"/>	<input type="text"/>	

Cancel Done

# Search NRDS for Office

- If the office is NOT is found, and you are the POE for the office, select Create New.
- If the office is found:
  - If the office is Found and Active with another POE, enter the office as a Secondary
  - If the office is Found, and this is not expected. Do not select the matching record, verify in NRDS first
- WIKI: [Search NRDS Database for Office](#)

# Add an Office

If you are the POE, you can add an office to NRDS

WIKI: [Add a Primary Office](#)

### NRDS Office Information

Sync to NRDS  [Get NRDS Number](#)

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS, as well as the information in the NRDS Additional Information section.

#### NRDS

NRDS ID	Join Date	Status	Status Changed Date	Non-Member Salespersons
<input type="text"/>	<input type="text"/>	-- No Choice -	<input type="text"/>	0
POE Association 70008563	Association ID 8563	Office DR NRDS ID	Office Manager NRDS ID	
		-- Select an Office DR NRDS ID --	-- Select an Office Manager NRDS ID --	
Primary State	Office Formal Name	Office Type		
-- No Choice -	<input type="text"/>	-- No Choice --		

#### Communication

Stop Mail	Stop Fax	Stop Marketing Material
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Address	Mailing Address (if different than Physical Address)	
-- Select a Physical Address --	-- Select a Mailing Address --	
Email Address	Phone Number	
-- Select an Email Address --	-- Select a Phone Number --	
Additional Phone Number	Fax Number	
-- Select an Additional Phone Number --	-- Select a Fax Number --	
Website		
-- Select a Website --		

# Add Additional Information Office

If you are the POE, you can add additional information for your offices

WIKI: [Additional Office Information](#)

### NRDS Office Additional Information ✕

Parent Company NRDS ID <input type="text"/>	District <input type="text"/>	Main Office ID <input type="text"/>	
Branch -- No Choice -- ▾	Billing Office ID <input type="text"/>	Office Contact Unlicensed <input type="text"/>	On Roster -- No Choice -- ▾
Franchise ID <input type="text"/>	Office Corporate Name <input type="text"/>	Tax ID <input type="text"/>	Corporate License <input type="text"/>
MLS Online Status <input type="text"/>	MLS Online Status Changed Date <input type="text"/>	MLS Office ID <input type="text"/>	

# Change Office Record

Whether you have updated the office contact information, or changed the status of the office – these changes will automatically be sent to NRDS

WIKI: [Change Office Record](#)

### NRDS Office Additional Information ✕

Parent Company NRDS ID	District	Main Office ID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Branch	Billing Office ID	Office Contact Unlicensed	On Roster
-- No Choice --	<input type="text"/>	<input type="text"/>	-- No Choice --
Franchise ID	Office Corporate Name	Tax ID	Corporate License
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MLS Online Status	MLS Online Status Changed Date	MLS Office ID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

# NRDS Office – Secondary Record

The secondary record is used to indicate a member's secondary associations, secondary offices, secondary licenses, etc.

If the search of NRDS finds an agent active with another POE, you will enter as a secondary

WIKI: [Add Secondary Office](#)

### Secondary Office

Sync to NRDS

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Office.

**Secondary Office Information**

Non-Member Salespersons <input type="text"/>	Status -- No Choice --	Status Changed Date <input type="text"/>
---	---------------------------	---

Cancel Done

# NRDS Office – Secondary Record

## Data Sent/Required

Field Name	Description	Data format	Required
<b>Initial Setup</b>			
<b>Association Id (read only)</b>	The 4-digit local association ID assigned to the association itself. This is configured during initial setup of the association	4 Numeric	X
<b>Real Estate Tab</b>			
<b>NRDS ID</b>	The unique 9-digit NRDS ID assigned to this office location.	9 Numeric	X
<b>NRDS Status</b>	Required. Use this field to indicate the Status of the Secondary record.	1 Alpha	X
<b>Status Changed Date</b>	Enter the date you changed the status of this Supplemental record	8 Date	
<b>Non-member Salespersons</b>	The number of non-member salespersons affiliated with this office. If the POE has verified there are no non member salespersons in this office, then a zero '0' must be sent.	5 Numeric	X



# NRDS Office – Secondary Record

**Always search NRDS!** If the office is Active with another POE, enter the office as a Secondary

### Search/Add Office

Search below for existing Offices in NRDS Central database. Results will be displayed below and if a match is selected, data will be populated directly from NRDS. Adding more information to your search criteria can help increase the accuracy of the search results that will display.

Office NRDS ID:  Office Name:  State:  City:  Office DR Last Name:

#### NRDS Search Results

Use suggested - We've found a possible match, see below.  
 Create new

Search:

	Office Formal Name	Office NRDS ID	State
<input type="radio"/>	Edina Realty	505000419	MN
<input type="radio"/>	Edina Realty	496500221	MN

### Secondary Member(s)

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Member.

Sync to NRDS

Office NRDS ID:  Member Type:  License Number:  Member Subclass:

Status:  Local Join Date:

Billing Discount:

# Add Agents to NRDS

- Through your integration with NRDS, you will be able to add agents from your GrowthZone software, and NRDS will be updated automatically with no further interaction on your part
- GZ processes changes every 2 minutes but they are queued and processed on the NRDS side according to the order received and can take up to 10 minutes to process

## Follow the rules!

GrowthZone simply passes data on... you must follow the same rules you would follow if you are entering offices directly into NRDS:

- For R and RA – licenses are required, this is populated on the agent’s Profile tab
- Point of Entry (POE) restrictions apply. Only the POE for an agent can add or change the record. If you are not the POE and attempt to add/change a record NRDS will reject this
- You can not sync records to NRDS if the agent is inactive in NRDS. You will need to access NRDS directly to activate the agent (first pass only, once this is done, you will be able to manage records via GrowthZone)
- If a records already exists in NRDS and you are attempting to add, NRDS will process this as a Change
- Ensure all required fields are populated, and formatted correctly
- Agents cannot be sent as “orphans” where they are not attached to any office. If a new agent is created an no office exists, that agent will be queued for a short amount of time to allow the staff member to finish creating the office

Always Search NRDS prior to adding an agent to ensure no duplication in records!

- If this is a new agent (has not had a NAR membership previously), and you are the POE, no matching agent should be found.
- If a matching agent is found in NRDS, and you are not the POE enter this agent as a secondary record.
- If a matching agent is found in NRDS, but is inactive. Do **NOT** sync the agent with NRDS. You will need to go to the NRDS database and setup the agent appropriately
- WIKI: Search NRDS Database for an Agent

# Search NRDS for Agents

Always Search NRDS prior to adding an agent to ensure no duplication in records!

### Search/Add Member

Search below for existing Members in NRDS Central database. Results will be displayed below and if a match is selected, data will be populated directly from NRDS. Adding more information to your search criteria can help increase the accuracy of the search results that will display.

Member ID:  | First Name:  | Last Name:  | State:  | Member RE License:

### Search/Add Member

Search below for existing Members in NRDS Central database. Results will be displayed below and if a match is selected, data will be populated directly from NRDS. Adding more information to your search criteria can help increase the accuracy of the search results that will display.

Member ID:  | First Name:  | Last Name:  | State:  | Member RE License:

**NRDS Search Results**

Create new

NRDS Member ID	First Name	Last Name	Office Name	Office City	Office State	Is Active
----------------	------------	-----------	-------------	-------------	--------------	-----------

## Scenarios:

- If this is a new agent (has not had a NAR membership previously), and you are the POE, no matching agent should be found. You will create a new record
- If a matching agent is found in NRDS, and you are not the POE enter this agent as a secondary record
- If a matching agent is found in NRDS, but is inactive. Do **NOT** sync the agent with NRDS. You will need to go to the NRDS database and setup the agent appropriately

WIKI: [Search NRDS Database for an Agent](#)

# Add New Agent

If you are the POE for an agent, you can add them to your database, and sync to NRDS.

WIKI: [Add an Agent \(Primary\)](#)

### NRDS Information

Sync to NRDS Get NRDS Number

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS, as well as the information in the NRDS Additional Information section.

#### NRDS

NRDS ID	Member Type	Active Since	Local Join Date	
<input type="text"/>	-- No Choice --	<input type="text"/>	<input type="text"/>	
POE Association	Association ID	Status	Status Changed Date	Primary State
70008563	8563	-- No Choice --	<input type="text"/>	-- No Choice --
License	Primary Field of Business			
-- Select a License --	-- No Choice --			
Office NRDS ID				
-- Select an Office NRDS ID --				

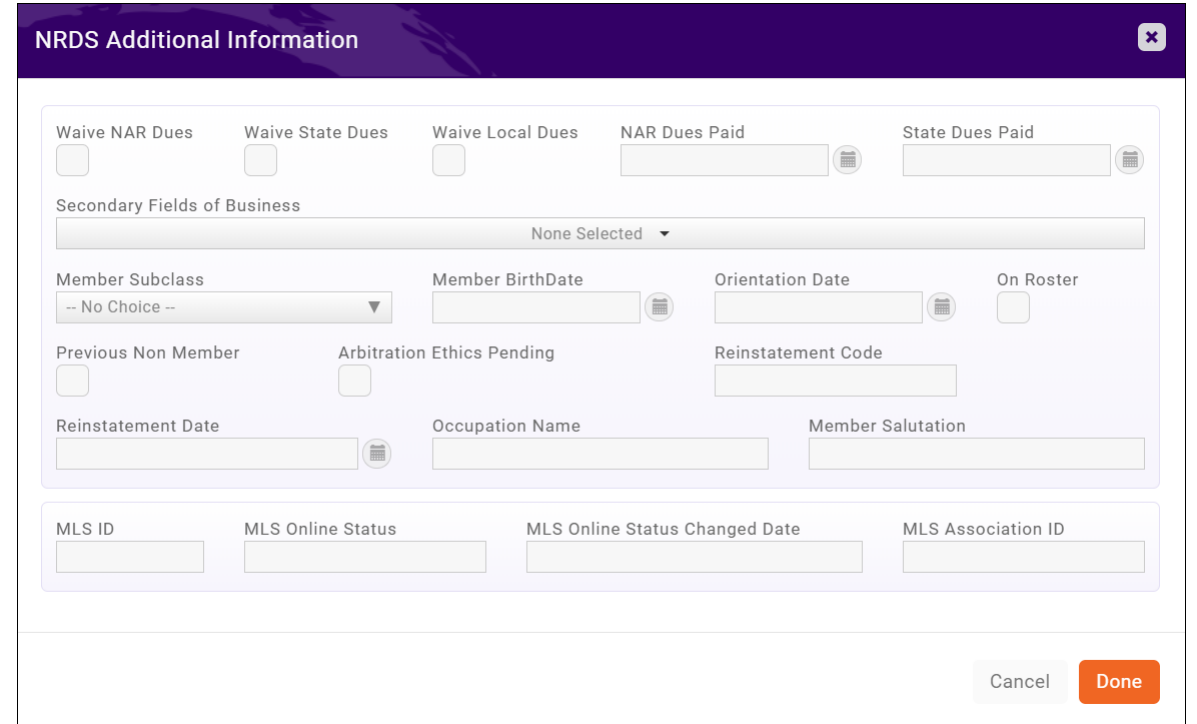
#### Communication

Stop Mail	Stop Fax	Stop Email	Stop Marketing Material
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preferred Mail	Preferred Publication	Preferred Phone Number	Preferred Fax Number
-- No Choice --	-- No Choice --	-- No Choice --	-- No Choice --
Home Address	Mailing Address (if different than Home Address)		
-- Select a Home Address --	-- Select a Mailing Address --		
Cell	Home Phone		
-- Select a Cell --	-- Select a Home Phone --		
Email	Fax Number		
-- Select an Email --	-- Select a Fax Number --		
Website			
-- Select a Website --			

# Add Agent (Primary) Additional Information

Additional information about your agents can be tracked in GrowthZone. This information is not required, but if populated will be synchronized to NRDS. NOTE: Only the POE can add/update additional agent information.

WIKI: [Add Agent \(Primary\) Additional Information](#)



The screenshot shows a web form titled "NRDS Additional Information" with a close button in the top right corner. The form is organized into several sections:

- Waiver and Payment Fields:** Includes checkboxes for "Waive NAR Dues", "Waive State Dues", and "Waive Local Dues". It also features date pickers for "NAR Dues Paid" and "State Dues Paid".
- Secondary Fields of Business:** A dropdown menu currently showing "None Selected".
- Member Information:** Includes a "Member Subclass" dropdown (set to "-- No Choice --"), "Member BirthDate" date picker, "Orientation Date" date picker, and an "On Roster" checkbox.
- Membership Status:** Includes checkboxes for "Previous Non Member" and "Arbitration Ethics Pending", along with a "Reinstatement Code" text field.
- Reinstatement and Occupation:** Includes a "Reinstatement Date" date picker, "Occupation Name" text field, and "Member Salutation" text field.
- MLS Information:** Includes text fields for "MLS ID", "MLS Online Status", "MLS Online Status Changed Date", and "MLS Association ID".

At the bottom right of the form, there are two buttons: "Cancel" and "Done".



# Change/Update a Primary Agent

If you are the POE for an agent you can change/update profile and NRDS information via GrowthZone

WIKI: [Change/Update an Agent \(Primary\)](#)

### NRDS Information

Sync to NRDS

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS, as well as the information in the NRDS Additional Information section.

#### NRDS

NRDS ID 987123492	Member Type -- No Choice --	Active Since <input type="text"/>	Local Join Date <input type="text"/>	
POE Association 70008563	Association ID 8563	Status -- No Choice --	Status Changed Date <input type="text"/>	Primary State -- No Choice --
License -- Select a License --	Primary Field of Business -- No Choice --			
Office NRDS ID -- Select an Office NRDS ID --				

#### Communication

Stop Mail <input type="checkbox"/>	Stop Fax <input type="checkbox"/>	Stop Email <input type="checkbox"/>	Stop Marketing Material <input type="checkbox"/>
Preferred Mail -- No Choice --	Preferred Publication -- No Choice --	Preferred Phone Number -- No Choice --	Preferred Fax Number -- No Choice --
Home Address 547 Lilac Avenue Crosslake MN	Mailing Address (if different than Home Address) 547 Lilac Avenue Crosslake MN		
Cell 217-987-9876	Home Phone 217-987-9876		
Email larahanks@mailinator.com	Fax Number -- Select a Fax Number --		
Website -- Select a Website --			

# Secondary Agent Records

The Agent Secondary record is used to store supplemental, or secondary records for a member. A member is in NRDS only once with one NRDS ID but you can link many secondary records to one member.

WIKI: [Data Sent for Secondary Agent Records](#)

### Secondary Member(s) ✕

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Member.

<input type="checkbox"/>	Office NRDS ID -- Select an Office NRDS ID --	Member Type -- No Choice --	License Number -- Select a License Number --	Member Subclass -- No Choice --
Status -- No Choice --	Local Join Date <input type="text"/>	Billing Discount -- No Choice --		

+ ✕

Cancel Done

# Add Secondary Agent Record

The approach used to add a secondary record will depend on whether the agent currently exists in your GrowthZone database, with a valid NRDS ID.

The approach used to add a secondary record will depend on whether the agent currently exists in your GrowthZone database, with a valid NRDS ID

WIKI: [Add a Secondary Agent Record](#)

### Secondary Member(s) ✕

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Member.

Sync to NRDS <input type="checkbox"/>	Office NRDS ID -- Select an Office NRDS ID -- <span>▼</span>	Member Type -- No Choice -- <span>▼</span>	License Number -- Select a License Number -- <span>▼</span> <span>+</span>	Member Subclass -- No Choice -- <span>▼</span> <span>✕</span>
Status -- No Choice -- <span>▼</span>	Local Join Date <input type="text"/>	Billing Discount -- No Choice -- <span>▼</span>		

Cancel Done

# Add Additional Secondary Agent Record(s)

You can add as many secondary records as needed for your agents.

WIKI: [Add Additional Secondary Agent Record\(s\)](#)

### Secondary Member(s) ✕

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Member.

Sync to NRDS <input type="checkbox"/>	Office NRDS ID Simple Realty - 987123491 ▼	Member Type Realtor ▼	License Number -- Select a License Number -- ▼ +	Member Subclass -- No Choice -- ▼
Status -- No Choice -- ▼	Local Join Date <input type="text"/>	Billing Discount -- No Choice -- ▼		

Cancel Done

# Update Secondary Agent Record(s)

WIKI: [Update a Secondary Agent Record](#)

### Secondary Member(s) ✕

When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as a Secondary Member.

Sync to NRDS <input type="checkbox"/>	Office NRDS ID Semple Realty - 987123491	Member Type Realtor	License Number -- Select a License Number --	Member Subclass -- No Choice --
Status -- No Choice --	Local Join Date <input type="text"/>	Billing Discount -- No Choice --		

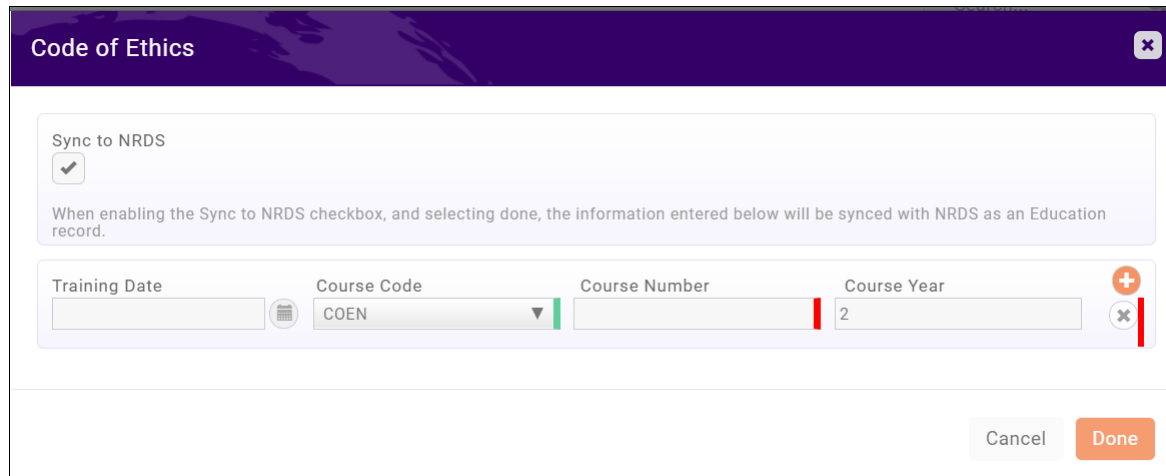
Cancel Done

# NRDS Education Records

NAR Requires certain education records to be recorded as a NRDS Education Record. GrowthZone currently provides the ability to track agent's Code of Ethics (COE) training

You do not need to be the POE to update an education record

WIKI: [Add Update Code of Ethics Training](#)

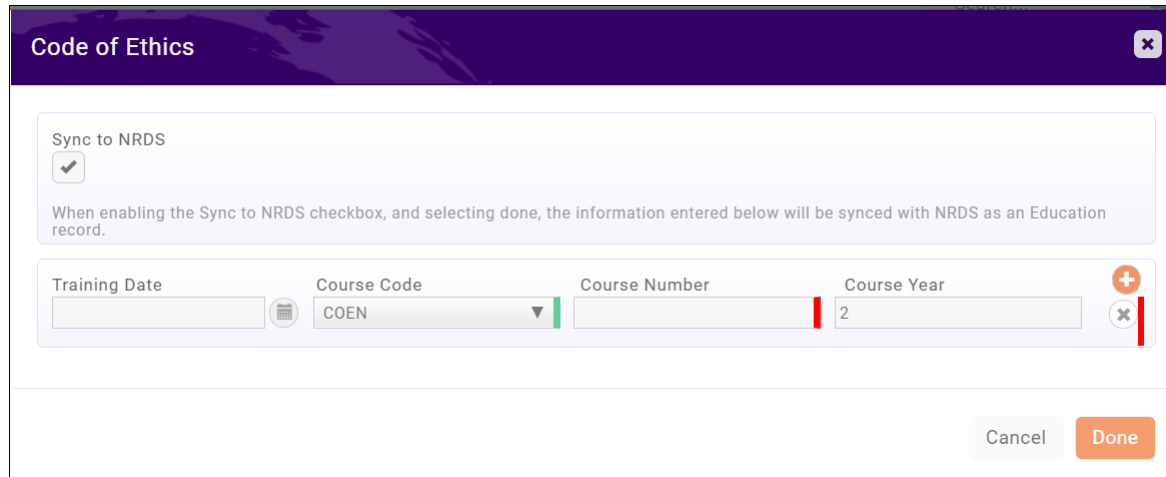


The screenshot shows a modal window titled "Code of Ethics" with a close button in the top right corner. Inside the modal, there is a "Sync to NRDS" section with a checked checkbox. Below this is a note: "When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as an Education record." The main form area contains four input fields: "Training Date" (empty), "Course Code" (a dropdown menu showing "COEN"), "Course Number" (empty), and "Course Year" (containing the number "2"). There are plus and minus icons on the right side of the Course Number and Course Year fields. At the bottom right of the modal are "Cancel" and "Done" buttons.

# NRDS Education Records

The agent must have an NRDS ID and **Sync to NRDS** must be enabled. NRDS will not allow you to add an Education record for a member who is not active (or Suspended) in NRDS (Status A, P or S).

WIKI: [Data sent to NRDS for Education Record](#)



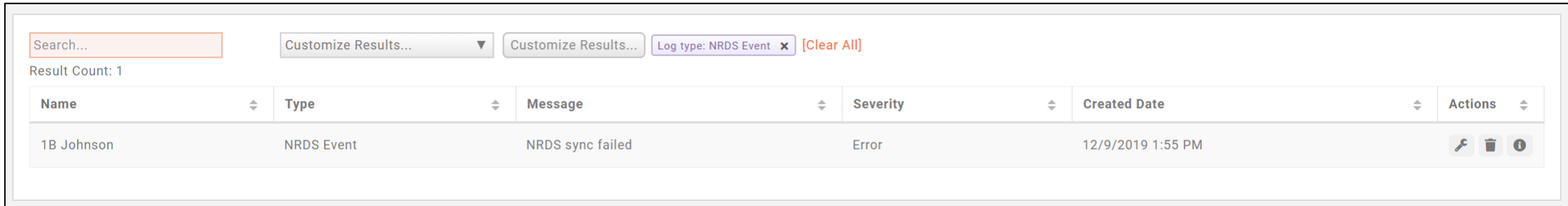
The screenshot shows a modal window titled "Code of Ethics" with a close button (X) in the top right corner. Inside the modal, there is a section for "Sync to NRDS" with a checked checkbox. Below this, a note states: "When enabling the Sync to NRDS checkbox, and selecting done, the information entered below will be synced with NRDS as an Education record." The form contains four input fields: "Training Date" (empty), "Course Code" (a dropdown menu showing "COEN"), "Course Number" (empty), and "Course Year" (containing the number "2"). There are plus (+) and minus (-) icons on the right side of the input fields. At the bottom right of the modal, there are two buttons: "Cancel" and "Done".

# Review the Event Log




Issues identified during synchronization may be visible in the event log

Most events are generated because of malformed or missing information

WIKI: [Review NRDS Event Log](#)



The screenshot shows a web interface for reviewing event logs. At the top, there is a search bar, two 'Customize Results...' buttons, a filter for 'Log type: NRDS Event', and a '[Clear All]' link. Below this, it indicates 'Result Count: 1'. The main content is a table with columns for Name, Type, Message, Severity, Created Date, and Actions. A single event is listed with the name '1B Johnson', type 'NRDS Event', message 'NRDS sync failed', severity 'Error', and created date '12/9/2019 1:55 PM'. The Actions column contains icons for edit, delete, and info.

Name	Type	Message	Severity	Created Date	Actions
1B Johnson	NRDS Event	NRDS sync failed	Error	12/9/2019 1:55 PM	  



Questions?

