Trestle™ For MLO Managers

Introduction

Trestle™ is a real estate data delivery and productivity solution. Trestle powers governed distribution of RESO-compliant and Trestle Direct listing data.

Remember, the configuration is specific to your Multiple Listing Organization, your practices, and your policies.

Each Connection you approve via Trestle will automatically and strictly adhere to your configuration. To learn more about the Connection Manager please click here.

Speed, efficiency, and compliance – all conveyed via Trestle! This document outlines key information that each Multiple Listing Organization subscribing to Trestle should digest and understand to undertake your configuration and commence Connections.

Trestle Subscriptions

Your organization must subscribe to Trestle to undertake configuration and commence making Connections to license your listing data.

If you have not subscribed, please reach out to a Sales Rep or Trestle Support at TrestleSupport@corelogic.com to start your onboarding process.

On your initial login you are asked to accept the subscription agreement. Please review and click the I Accept button.

Welcome aboard!

Data Feed Manager

Trestle provides the following data feeds via RETS and WEBAPI:

- Back Office for Technology Providers:
  - Back Office Feed for Technology Providers to manage on behalf of a Broker(s)
- Basic Feed:
  - Feed with minimal restrictions, intended for MLO customization
- Broker Data Feed:
  - The aggregated feed for Brokers. Includes the brokerage's on and off-market data, plus roster. Compliant with NAR Participant Data Access policy.
- IDX:
  - Supports the latest RESO Data Dictionary standard of On Market data (Active, Pending and Active w/Contract status)
- IDX Plus:
  - Supports the latest RESO Data Dictionary standard of On Market data and up to 7 years of Off-Market data (Active, Pending, Active w/Contract, and Sold statuses (and the selling information that goes with the sold status, like Close Date, Selling Agent, Selling Co-Agent and Selling Office)
- MLS Org - Business Partner – Basic:
  - Feed supporting MLS Organization - Business Partner - Basic data feed with minimal restrictions, intended for MLO customization
- MLS Org - Business Partner – IDX:
  - Feed supporting MLS Organization - Business Partner - IDX Data Feed supports the latest RESO Data Dictionary Standard of On Market data (Active, Pending and Active w/Contract status)
- MLS Org - Business Partner - IDX Plus:
  - Feed supporting MLS Organization - Business Partner -IDX Plus Data Feed supports the latest RESO Data Dictionary Standard of On Market data and up to 7 years of Off-Market data (Active, Pending, Active w/Contract, and Sold statuses (and the selling information that goes with the sold status, like Close Date, Selling Agent, Selling Co-Agent and Selling Office)
- MLS Org - Business Partner – Statistics:
  - RETS Feed supporting MLS Organization - Business Partner - Statistics supports the latest RESO Data Dictionary Standard, at the discretion of the MLO, updated to have all fields (active, pending, sold, withdrawn, expired...) this feed does not have photos
- MLS Org - Business Partner – VOW:
  - Feed supporting MLS Organization - Business Partner - VOW, Data Feed supports the latest RESO Data Dictionary Standard
- Roster Only:
  - Membership ONLY data (Office and Agent data)
- Sample Data Feed:
  - MLOs Sold/Closed listing from 2016, with 1-stock photo
- Statistics:
  - At the discretion of the MLS, updated to have all fields (active, pending, sold, withdrawn, expired...) this feed does not have photos
- VOW:
  - All status /MLS data (on market, up to 7 years of off market, expired, withdrawn)

Data Feed Manager

Customize the data feeds, default fees and licenses for your Multiple Listing Organization.

100 ⌄ RECORDS PER PAGE					SEARCH
DATA FEED	DELIVERY	SETUP FEE	FEE / PERIOD	ENABLED	
Back Office for Technology Providers	WebAPI	0.00	0.00 / Monthly	Yes	Edit
Back Office for Technology Providers	RETS	0.00	0.00 / Monthly	Yes	Edit
Basic Feed	WebAPI	0.00	0.00 / Monthly	No	Edit
Basic Feed	RETS	0.00	0.00 / Monthly	No	Edit
Broker Data Feed	WebAPI	0.00	0.00 / Monthly	No	Edit
Broker Data Feed	RETS	0.00	0.00 / Monthly	No	Edit
IDX	RETS	0.00	150.00 / Yearly	Yes	Edit

Your organization is empowered to configure each data feed via five distinct areas:

- Edit **Details** about the feed
- Edit **Fees** pertaining to Technology Providers for each data feed
- Manage **Contracts** governing each data feed
- **Customize Data** delivered via the feed
- **Nickname** the feed
- For a list of fields available and enabled within the Data Feeds, go to the bottom of the list, and click the **"ALL FEEDS FIELD REPORT"**

More information follows on the configuration options offered within each data feed tab.

Please note: You must click save after editing within each tab of the Data Feed Manager.

Details

Edit Details enables you to configure underlying attributes associated with each data feed.
They are:

- Configure if each data feed is Enabled
- Configure Broker Participation, indicating if each data feed will provide all listings or solely those of Brokers who choose to opt-in via Trestle
- Configure Broker Authorization, indicating if the license for each data feed will be subject to Broker authorization
- Optionally, enter a data feed description describing feed details to consumers.

Fees

Edit Fees to configure the fees associated with each data feed. You can configure:

- The Fee Period to establish billing frequency (monthly, quarterly, or annually in advance)
- The dollar amount for Liquidated Damages, if any, that you wish to impose on licensees
- The Change Notice Period to modify fees
- The One Time Fee, if any, you wish to charge each new licensee for setup
- The recurring Monthly, Quarterly or Annual Fee you wish to charge each licensee to whom you grant a Connection
- The Type of fee charges can be flat, per URL, per license and tier pricing

- Please note that:
    - Liquidated Damages is the compensation amount awarded to your organization if the data license agreement is breached. You can simply enter zero dollars if you do not wish to establish an amount for liquidated damages.
    - The recurring fee is subject to the frequency you establish for billing. Supported billing frequencies are monthly, quarterly and annual.
    - Failure to enter a periodic fee essentially amounts to offering your data free of charge. Please be sure to enter the amount for **each data feed** you choose to support.
    - Trestle fees you configure should include any sales tax you are liable to collect and remit. As currently structured, Trestle will not automatically calculate and add sales taxes to data licensing fees.
    - Once the frequency and fees are configured, they apply to all Connections initiated by Technology Providers.
    - Trestle allows to modify fees for an individual Connection prior to accepting the license.
    - Deposits will be made directly into the Deposit Account you designate in Account settings.

Contracts

Trestle automates the data licensing processes for each Multiple Listing Organization by supporting:

- Automatic and detailed contract generation
- E-signatures
- Contract storage and retrieval
- 3-way agreements via Broker authorizations
- Automatic renewal management Configure Contracts empowers each Multiple Listing Organization to designate the actual data license and Broker authorization form that will govern its distribution of each data feed. In the event your organization has not supplied Trestle with an alternate data license or Broker authorization to encode and load, only the default Trestle documents appear in the Contracts folder. For further detailed about each data licensing option, please refer to the discussion about Data Licenses and Broker Authorization below.

Data Licenses

Trestle supports three fundamental data licensing scenarios by which you can connect with Technology Providers. The options are:

1. The Default Trestle Data License Trestle offers a carefully constructed data license that any Multiple Listing Organization is invited to use at no cost. In fact, this is the default option offered by Trestle and enables you to instantly, easily effect Connections with Technology Providers. The default data license is built to reflect the business rules embedded in Trestle, conform with general industry practices, and incorporate terms most frequently employed in multiple listing PAGE 8 © 2022 CORELOGIC CONFIDENTIAL/PROPRIETARY INFORMATION OF CORELOGIC. INTERNAL USE ONLY. data licenses.
Please also note that you are welcome to edit the default Trestle data license to conform with your organization's requirements, then furnish the resulting document for Trestle use via option 3 below. To review the default Trestle data license, please click here.

2. Your Existing Data License with an Appended Trestle Addendum Trestle enables you to use your existing data license, provided an addendum covering Trestle requirements is appended. The addendum, which has been expressly prepared for your free use by CoreLogic, augments your existing data license so that it can leverage and adhere to Trestle.
Consequently, you can preserve the carefully architected terms of your existing data license knowing that it will conform to Trestle requirements. To review the addendum, please click here.

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In the event you elect to use this option, you must email your existing data license to Trestle Support with instructions to append the addendum. The support team will append the addendum for you, then prepare the resulting, unified document for encoding and use via Trestle. Unless instructed otherwise, the new document will be inserted for use with each data feed you enable for use via Trestle.

Please also note this important clarification: While the default data license offered by Trestle covers all data feeds, you are invited to send a separate and distinct license for each data feed, provided the addendum is appended to each one.

3. <u>Revise Your Existing Data License to Conform with Trestle Requirements</u> You are welcome to revise your existing data license to conform with the business rules that drive Trestle. In effect, this amounts to option 2, but envelops the required terms for Trestle into a single, unified license. The terms reflected in an agreement you craft for use via Trestle must be consistent with Trestle constructs regarding:

- Term, renewal and termination
- Fee schedule and modifications
- Liquidated damages amount
- Permitted use, particularly with respect to requirements, if any, for Brokers to opt-in for use of their content
- Data feeds and delivery
- Broker authorization requirements (also known as 3-way agreements) As noted earlier, you are welcome to review and edit the default Trestle data license for purposes of option 3. It speaks to the specific Trestle requirements, but still offers you ample opportunity to incorporate the requirements for your organization.

In the event you elect to use this option, you must email the data license and instructions to [Trestle Support](). The support team will prepare and insert the data license into Trestle for your use. Unless instructed otherwise, the new document will be inserted for use with each data feed you enable for use via Trestle.

Ultimately, you must choose one scenario for your organization. We recommend initially evaluating the completeness and suitability of option 1, simply because it represents the simplest route to begin using Trestle immediately. If that is insufficient, please evaluate options 2 and 3. While options 2 and 3 are somewhat different in character, both ultimately require the Trestle Support team to encode and load your data license agreements into the Trestle system. Please allow several weeks for that encoding and load process to unfold.

If you elect option 2 or 3, please email a copy of your contract to [Trestle support]() in a Word format. Please also clearly indicate if you are planning to use option 2 or 3.

In areas where your contract incorporates data elements that will be auto-filled, please allow adequate blank space. For example, if you charge a monthly fee in the amount of $50, please leave blank spaces into which the system can merge the frequency and recurring fees you configure via Trestle.

Of course, we are also pleased to assist you in this endeavor. Please feel free to contact [Trestle support]() if you have questions or need assistance.

Broker Authorizations

Trestle supports two scenarios by which you can incorporate Brokers' authorizations — also known as 3-way agreements -- into the data licensing practices you apply to relationships with Technology Providers.

Use of Broker authorization is entirely optional; during the configuration process for each data feed, you determine if its licensing is contingent on Broker authorization. Consequently, and by way of example, you could conceivably choose to require Broker authorization for syndication data feeds, but not for other data feeds. The choice and configuration are entirely up to you.

However, please be aware that the decision to require or not require Broker authorization for a particular data feed applies to all feeds; you cannot author exceptions for individual Technology Providers.

In the event you choose to employ Broker authorization, you must choose one of the following scenarios for your organization. The options are:

1. <u>Use the Default Trestle Broker Authorization Form</u>
Trestle offers a default Broker authorization form that any Multiple Listing Organization is invited to use at no cost. In fact, this is the default option offered by Trestle and enables you to instantly, easily effect Connections with Technology Providers that are subject to Broker authorization.

2. <u>Use Your Existing Broker Authorization Form</u>
Trestle enables you to use your existing Broker authorization form in lieu of the default form available via Trestle. In the event you elect to use this option, please send your existing authorization form to Trestle Support, who will prepare the form for encoding and use via Trestle.

In the event you elect to utilize a Broker authorization form within Trestle, the following conditions and outcomes apply:

- Your execution of a data license and Connection with a Technology Provider results are effectively contingent on one or more Brokers authorizing your organization to furnish listing data for use via the Technology Provider's product.

- Before a Broker can issue their authorization they must subscribe to Trestle, connect with your Multiple Listing Organization -- and then authorize.

- The execution of a Broker authorization is a click-through process, whereby the Broker indicates their acceptance of the Broker authorization form in Connection with a specific Technology Provider's product.

- Please note that the Broker authorization process is unilateral click-through process; Trestle does not require or support reciprocal approval or acceptance of the Broker's authorization by a Multiple Listing Organization.

- Copies of each executed Broker authorization are captured within and retrievable via Trestle.

- In the event a data license is contingent to Broker authorization, Trestle will withhold enabling a data feed to the Technology Provider until at least one Broker has provided authorization.

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Data Customizations

Customize Data enables you to configure the data elements you wish to include/exclude in each data feed.

It also enables you to configure the data feeds for which you wish to include/exclude media.

Before beginning to customize data for your organization, a bit of background will be helpful:

1. Each default Data Feed provided via Trestle includes slightly different fields and statuses. In general, Trestle has attempted to supply the fields and listing statuses generally deemed relevant for that type of data feed.
2. However, Trestle recognizes that your Multiple Listing Organization may operate with different rules than the default data feed configurations within Trestle. Consequently, Trestle enables you to customize the media and fields you offer via each data feed.

For example, you may logically conclude that media is not relevant to a Statistics data feed and exclude media from that feed.
Similarly, you may wish to exclude expiration date from all IDX data feeds.

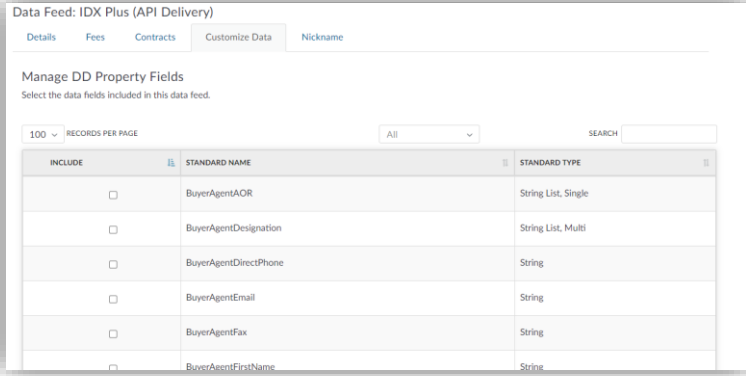Customization for each data feed is broken into four distinct resources:

- Media
- Member
- Office
- Property

Within each resource, you are able to edit Media and Fields. But please note that you can edit fields in all resources, but editing Media is only applicable to the Media resource itself.

Data Feed: IDX Plus (API Delivery)

Details   Fees   Custom Tier Pricing   Contracts   **Customize Data**   Nickname
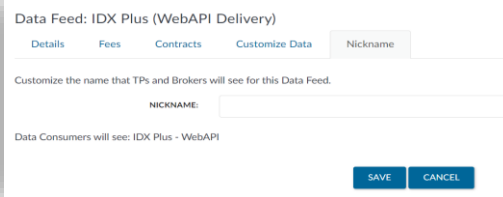
Customize the fields and media included in this Data Feed.

RECORDS PER PAGE   SEARCH

STANDARD RESOURCE	FIELD COUNT	FORCED CRITERIA		
DD CustomProperty	128	(InternetEntireListingDisplayYN eq true) and ((StandardStatus eq 'Active' or StandardStatus eq 'ActiveUnderContract') or (OffMarketDate ge 2012-01-01 and (StandardStatus eq 'Closed')))	Edit Fields	
DD Field	12		Edit Fields	
DD Lookup	11		Edit Fields	
DD Media	37		Edit Fields	

To edit fields, click the **Edit Fields** link.

To exclude any field from a data feed, simply uncheck that field. To resume including a field within a data feed, simply re-check that field. Changes are instantaneous, but please understand that your customization applies to all recipients of a data feed. Data cannot be customized on a case by case, licensee by licensee basis.

Nickname

You can customize the name that displays for this Data Feed.
Data Consumers will see: "Nickname (IDX Plus WebAPI)"

Account Manager

Some account information is entered during the subscription process. The Account Manager enables you to update your prior entries and add other information about your organization that is often vital to the operation of Trestle. Specifically, you can manage:

- Contact Information for the individual managing Trestle on behalf of your organization
- Company Information necessary for operation of Trestle – and especially information necessary to generate and execute data licenses
- Company Description to convey information about your company to Technology Providers and Brokers who may wish to connect via Trestle
- Logo to co-brand Trestle for your organization
- Password to change or update your Trestle credentials
- Bank Deposit to manage the bank information that controls where fees collected via Trestle will be deposited

- Payment Information to manage credit card data for fees that are payable to CoreLogic for use of Trestle.
- Subscription to access the Trestle Subscription Agreement
- User Manager allows you to add and manage additional users within your Multiple Listing Organization. Users added here will be invited to Trestle by email and they can begin performing tasks within your account.
- Adoption Status Report displays New Connections and Connections with New Contracts within a selected period
- We encourage all subscribers to provide a thoughtful company description and to incorporate a logo to effectively market their presence within Trestle.

Please carefully note that Bank Deposit and Payment Information are securely processed through and stored by a 3rd party company specializing in such secure e-commerce services. Trestle does not store such confidential data in any manner. The data required to support e-commerce is solely determined by our e-commerce provider, Stripe. If you wish to review Stripe's terms of service, please click here.

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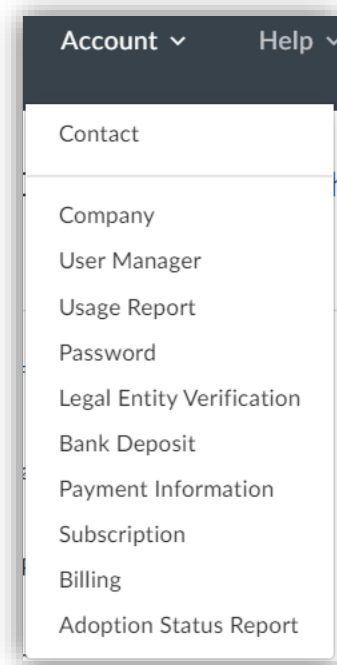
Connection Manager

The Connection Manager enables Technology Providers, Multiple Listing Organizations and Brokers to formally establish and manage data licensing via Trestle.

The Connection Manager supports the full life cycle pertaining to those relationships, in which Connections may be in any of the following statuses:

- Pending Multiple Listing Approval
- Pending Technology Provider Approval
- Approved
- Approved – Broker Contingency
- Declined Multiple Listing
- Declined Technology Provider
- Termination Pending
- Terminated
- Suspended

Initiating a new connection

You can invite new connections to access to your data distribution from the Connection Manager by clicking the Add Connection button and entering the email address for access and the assigned data feed. The recipient will receive an email to accept your connection or register for Trestle to accept the connection.

Connection Manager

View and manage your Multiple Listing Organization connections with the Technology Providers and participating Brokers/Agents.

ADD CONNECTION

Add Connection

Invite a Technology Provider or a Broker/Agent to access to your data.

TECHNOLOGY PROVIDER OR BROKER *

@properties

DATA FEED *

VOW - WebAPI

☐ I acknowledge that this live Trestle data connection will require Trestle's contract management and **will not** charge the vendor a data licensing fee via Trestle. The vendor will be charged the standard Trestle platform fee.*

☐ I acknowledge that this live Trestle data connection will require Trestle's contract management and **will** charge the vendor a data licensing fee via Trestle. The vendor will be charged the standard Trestle platform fee.*

CLOSE SEND

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*Inviting a connection will not require Trestle's contract management and a vendor data licensing fee via Trestle is optional; Trestle platform fees will apply.

Connections are often initiated by Technology Providers and Brokers who wish to license listing data from your Multiple Listing Organization.

*It is worth taking a short look at the **Connection** process through the eyes of a Technology Provider.

Each Connection requires just a few simple steps.

To begin, the Technology Provider accesses their view of the **Connection Manager**, then sequentially:

1. Selects the product for which they wish to establish a Connection
2. Selects the Multiple Listing Organization from whom they wish to license listing data
3. Reviews the enabled data feeds and fees enabled by the selected Multiple Listing Organization
4. Selects the data feed they wish to license
5. Previews the data license terms as configured by the Multiple Listing Organization
6. Requests an e-signature ready copy of the data license

When a Technology Provider requests the e-signature ready data license, the Trestle administrator for the corresponding Multiple Listing Organization will receive an alert via email that a "pending" Connection was initiated by the Technology Provider. In parallel, the status appearing in the Connection Manager will display "Pending Technology Provider Approval."

Anticipating that the Technology Provider will apply their e-signature to the data license, it is advisable to immediately review the "pending" Connection via the Trestle Connections Manager.

E-Signature Processing

When a Technology Provider has esigned the agreement, it will be emailed directly to the designated individual within your organization to counter-sign.

The email is sent by our e-signature provider, **Authentisign**. The email includes a link to a page, as pictured here, through which your organization actually completes the signing process.
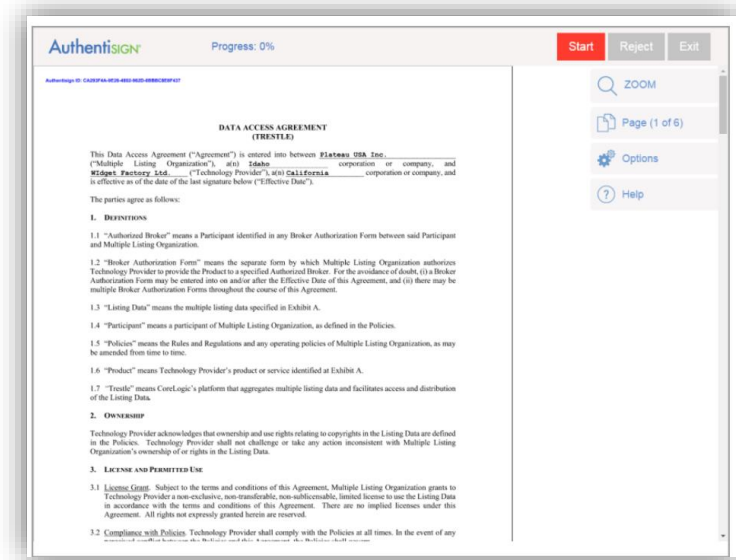
Since a fully executed agreement cannot be rescinded or invalidated, it is important to act quickly and decisively if the data license should not be executed.

Shortly after the contract is executed by your organization, the Connection Manager will be updated to display either that:

1. The Connection is Approved
2. The Connection is Approved – Broker Contingency if a 3-way agreement is in effect

In the event the Connection is approved and not subject to a 3-way agreement, the data feed to the Technology Provider will be promptly and automatically enabled.

In the event the Connection is subject to a 3-way agreement, no data will be accessible by a Technology Provider until one or more Brokers have provided their authorization via Trestle.

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Declining a Connection

When the Technology Provider initiates a Connection, it will appear in the Connection Manager of the Multiple Listing Organization's account with a status labeled "Pending TP Signature."

Once the Technology Provider has affixed their e-signature, and prior to your counter-signature, the status appearing in the Connection Manager displays **Pending MLO Approval**.

If your organization does not wish to approve a Connection, please navigate to the Trestle Connection Manager, select the pending Connection, and click the Decline button.
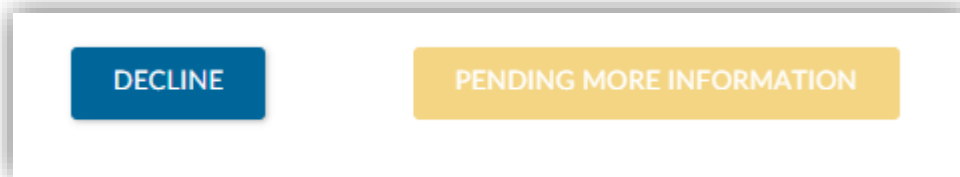

You can decline a Connection as soon as the Technology Provider initiates the process. You do not need to wait for the Technology Provider to affix their e-signature. In fact, if you Decline, the e-signature ready document ceases to be available for e-signature.

You can also Decline a connection by clicking on the Reject button available during the actual e-signing process. That has the same effect as clicking the Decline button through the Trestle Connection Manager.
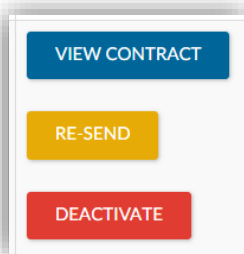
Other Connection Activities

Each Multiple Listing Organization will be able to suspend or terminate Connections via the Connection Manager.

Suspend a connection in Connection Details:
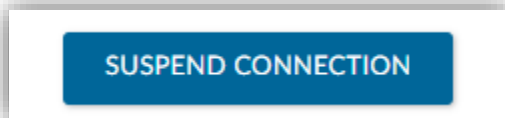
Deactivate or terminate a contract within the Contracts tab.

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Your Feedback Wanted

Your feedback has an impact on setting product priorities!

As always, please contact [Trestle Support](#) with any feature requests, bug reports, or any other idea that would make your business more productive or easier to operate.

Thank you!
Your Trestle Team