Trestle™ 4.22 Release Notes

February 19, 2019

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MLS: Business Entity Verification Changes

Rationale and Background

Trestle uses Stripe as its backend e-commerce processor. In order to charge license fees on behalf of the MLS and deposit money into MLS banks, we set each MLS up with an account at Stripe. These are what Stripe calls "Connect Accounts" – they don't have a username and password and can't log in to Stripe on their own. Their data is managed over Stripe's API, but for purposes of charging and depositing money they are normal Stripe accounts.

Prior to this release, our Business Entity Verification page interacted with the Stripe API to maintain the data needed to satisfy Stripe's Know-Your-Customer (KYC) requirements. The entire form directly accessed their API to load and store data—none of that information ever hit the Trestle application server or traversed the CoreLogic network.

Unfortunately, this approach meant the page required constant maintainence as Stripe's API evolved. It also put CoreLogic in the middle of the relationship between the MLS and Stripe, including sometimes requiring us to manually collect personal KYC details from MLS representatives.

Recently Stripe began providing a hosted onboarding workflow. Connect Account holders can be sent via a special, authenticated URL into a page at Stripe where this data can be entered and maintained. In this release we have eliminated almost everything on our Business Entity Verification page and replaced it with a link to Stripe's new tool.

Workflow and Changes

We have now updated the Business Entity Verification page to pass MLS users directly into an interface at Stripe where you can maintain that data.
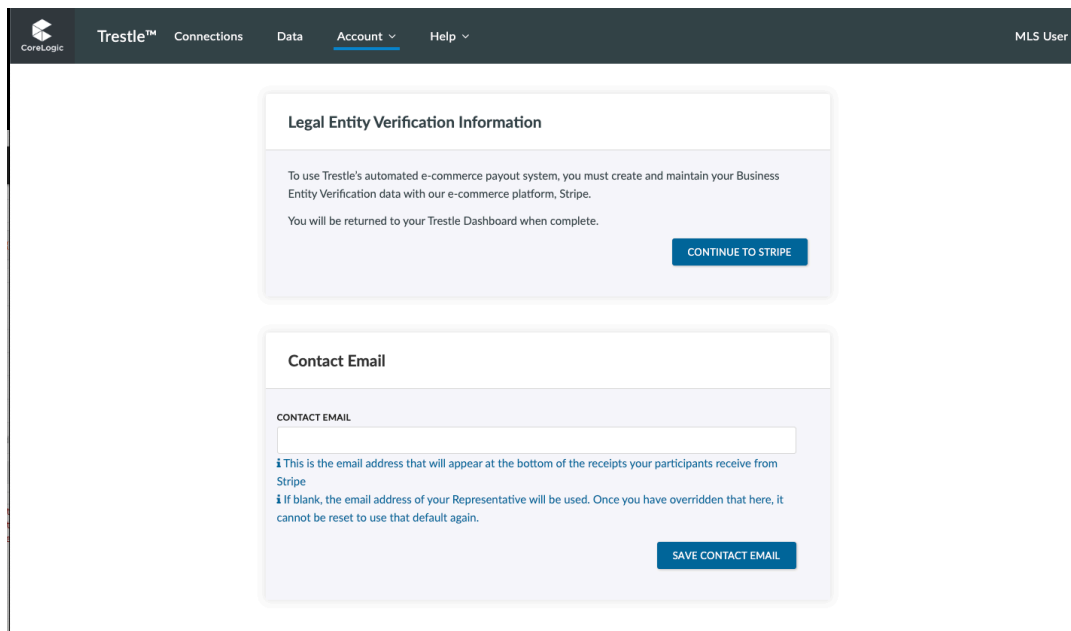
Click the "Continue to Stripe" button, and you will be brought to Stripe's onboarding and maintenance workflow.

MLSs who have already entered this information via the old Trestle page will see a form that already knows them. It will allow them to edit their info:
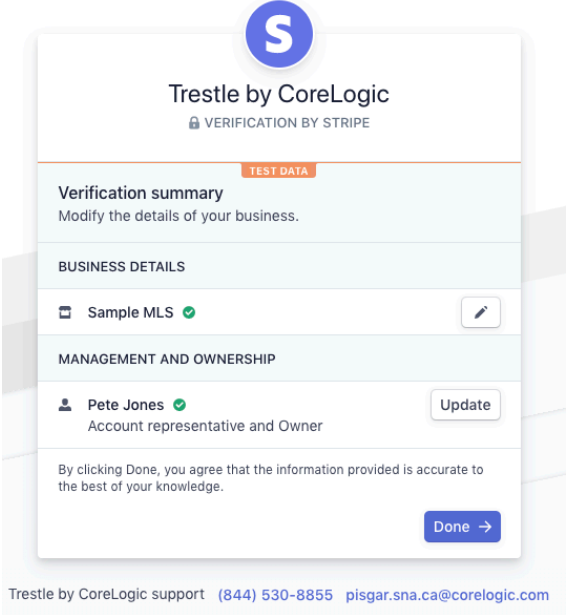
MLSs who have not yet set up their info will be brought into Stripe's onboarding workflow. As you dig into it, you'll find it's pre-populated with some of the info you provided at Trestle account setup:
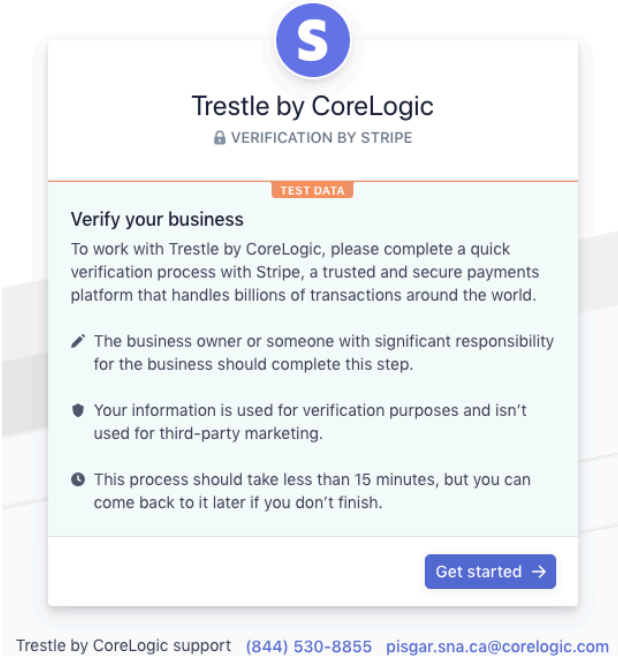
In both cases, you'll be returned to your Trestle dashboard when you say you're done. Stripe allows you to do this in pieces over several sessions, so you can use our page to return here at any time.

Dashboard Tables Maintain State

We have heard your feedback about how frustrating it is that the data tables on the Trestle Dashboard fail to remember anything about themselves when you drill into an item and then come back. It forces people to reset their filters and sorts, find their place again in the pagination, etc.

It's also been pointed out that defaulting to 10 items per page in these lists is not the right choice, now that some people have many more than 10 connections.

As of this release, all data tables on the site will retain their state across page loads. They will remember their page size, pagination position, sort settings, and filter values. This state that is saved is browser-specific and not shared across users of an MLS, TP, or Brokerage account.

We've also changed the default page size to 100 rows, and changed the possible page size values to 100, 200, and 500.

Over the next few releases we will be implementing layout refinements to optimize this change. For instance, on the MLS dashboard, having 100 Technology Provider connections pushes the Broker list far down the page. We'll be experimenting with a tab-oriented layout on that page to compensate for this. There also may be specific tables where different settings that the global ones are appropriate.

Fixes

TRES-9767 – The Trestle Defender dashboard is now visible to all MLS account members, not just the primary account owner.

TAPI-983 – Fixed some sources of API error: Invalid non-ASCII or control character in header: 0x200B
(Thanks to Joe Heald at Boston Logic for reporting this.)

TAPI-993 – Requests to $metadata should allow Accept: application/xml

TAPI-1015 – Open house datetimes are UTC when $expanded, local when not
(Thanks to Jason Tobias at Homes.com)

TAPI-1041 – DataDictionaryVersion is blank in DataSystem endpoint
(Also from Jason Tobias at Homes.com.)

TAPI-1048 -- @odata.nextLink is not properly urlencoded
(Thanks to Amanda Zimmerman at Redfin)

TAPI-1057 – Listings with only 1 photo not returning all information
(Thanks to John Erlanson from IDX, LLC)

Your Feedback Wanted

We're eager to hear your thoughts about the contents of this release. Your feedback is a key factor in setting product priorities, so hearing from you is very important to us!

Please let us know any feature requests, bug reports, or any other idea that would make your business more productive or easier to operate.

Your contact for feedback on Trestle is:

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Thank you!