Trestle™ Release Notes

February 4, 2019

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"Contractless" Connections

Rationale and Value

Until now, the Trestle dashboard required Technology Providers and MLSs to complete the contract signing workflows before their data connection was activated. However, there are MLSs that manage some or all of their contracting, document management, and billing outside of Trestle. Requiring those steps to happen on the Trestle Dashboard is an impediment to that.

As of this release it's now possible to set up a connection without going through the Trestle contract management processes. MLSs can use this feature to implement their data distribution through Trestle, while doing their contract management and billing in a different system.

In combination with the Syndication Management features we released a few months ago in version 4.17, Trestle now provides a complete solution for broker-managed syndication of listing data to big aggregator platforms and other vendors with whom the MLS has blanket site licenses.

Workflow for the MLS

The Technology Provider you wish to connect with must be set up fully in Trestle. Their account's onboarding must be complete with contact, business, and payment details. They will know this is all set when there are no red notification alerts in the header of their Trestle dashboard.

The workflow begins with the MLS clicking the new "Add Connection" button at the top right of the Connections list. A dialog will ask Technology Provider to contact (with a type-ahead search) and which feed type to offer them. The interface will confirm that you really intend to create a connection with that TP that will not have on-Trestle contracts and billing.

A new table will appear on the MLS dashboard to display currently active invitations. The MLS can cancel or re-send any invitation on the list.

Workflow for Technology Providers

The Technology Provider will receive an email from Trestle alerting them to the invitation. It will also show up in their list of Connections:

Note the "Contract Type" field of "Outside Trestle".

When the TP clicks "Accept", a dialog will prompt them to connect the feed to a Product, or to create one.

If the TP's product already has credentials for that data feed type, the newly connected data set will be available immediately with those credentials. If the product does not already have credentials for that data feed, Trestle will generate a client_id and client_secret, and display them *once*.

After Setup

What gets established by this process is a normal Trestle connection, exactly the same as those that have contracts attached. They can be suspended by the MLS, cancelled by Trestle Support, etc. They do not generate MLS license billing, but they are charged the Trestle platform fee.

MLS: Dynamic Field Filtering

Rationale and Value

Trestle has many sorts of filtering already built in—it can filter rows and filters out of result sets at the Trestle (global), MLS feed, and per-TP-connection levels. This release adds logical, or "dynamic", field filtering, where a set of fields is suppressed based on a value found in a different field.

This allows us to support frequently requested filtering setups like awareness of InternetAddressDisplayYN.

The feature provides a series of pre-built filtering rules and makes it easy to add new rules as the need for them arises. In this release there are three filters available:

- Suppress address fields if InternetAddressDisplayYN = false
- Suppress Latitude and Longitude if X_GeocodeSource is not "Manual"
- Suppress ExpirationDate if listing status is not "Expired"

Our implementation allows the MLS some flexibility about exactly which fields are suppressed. We provide a menu of likely fields, from which you can pick the ones to actually suppress.

Workflow

Log into your MLS dashboard and click the "Data" menu bar item.

Select a data feed to manage and click the "Edit" link on the far right.

In the "Customize Data" tab, you'll find a new column for Property called "Dynamic Field Filters".

Data Feed: IDX Plus (API Delivery)

Details   Fees   Contracts   **Customize Data**

Customize the fields and media included in this Data Feed.

10 ⌄ RECORDS PER PAGE   SEARCH [   ]

STANDARD RESOURCE	FIELD COUNT	FORCED CRITERIA			
DD CustomProperty	62		Edit Media	Edit Fields	
DD Media	33		Edit Media	Edit Fields	
DD Member	64		Edit Media	Edit Fields	
DD Office	45		Edit Media	Edit Fields	
DD OpenHouse	28		Edit Media	Edit Fields	
DD Property	563		Edit Media	Edit Fields	Dynamic Field Filters
DD PropertyRooms	19		Edit Media	Edit Fields	
DD PropertyUnitTypes	17		Edit Media	Edit Fields	

Showing 1 to 8 of 8 records   Previous   **1**   Next

The "Dynamic Field Filters" link will bring you to the new dynamic filtering interface for that feed type:

Individual filtering rules can be turned on with the switch in the left column.

The arrow on the far left expands an interface to pick which of the available fields should be included in the suppression for this rule:

We provide you a menu of likely fields to suppress, and the flexibility to choose any combination of those fields to actually apply the filter on.

After you click "Save", your settings are stored. When you return to the page, you'll see the details of your filter selections.

		Name	Forced Criteria	Suppress Fields
>	ON	Suppress Expiration Date	MlsStatus != "Expired"	
>	OFF	Suppress Manual GeocodeSource	X_GeocodeSource != "Manual"	
>	ON	Suppress Non Internet Address Display	InternetAddressDisplayYN == false	City, Country, CountyOrParish, PostalCity, PostalCode, PostalCodePlus4, StateOrProvince, StreetAdditionalInfo, StreetDirPrefix, StreetDirSuffix, StreetName, StreetNumber, StreetNumberNumeric, StreetSuffix, StreetSuffixModifier, UnitNumber, UnparsedAddress

Contexts Available for Dynamic Field Filtering

MLS dashboard users have the ability to implement these filters on a global feed-type basis (i.e. for all of their "IDX Plus – WebAPI" feeds to all data consumers).

We have internal tools available to CoreLogic staff to configure the same group of dynamic filters on a per TP-connection basis. If you want a specific vendor's feed to be filtered in a different way than the global setting for that feed type, please contact your Implementation rep, or email trestlesupport@corelogic.com.

Designed for Flexibility

This dynamic field filtering solution was implemented in such a way that it's very simple for us to add new filtering rules. The filters configs are database records, not hard-coded logic. As a result, it's very easy for us to add new rules to this system. Please contact Trestle Support if you have a request or suggestion of a rule that would be useful for you.

Fixes

API

TAPI-1076 – Order-by queries failing with StandardStatus eq 'Closed'

Your Feedback Wanted

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

We'd appreciate if you would complete this brief survey: https://www.surveymonkey.com/r/SLSJTHB

Feel free to reach out at any time with 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!