



CoreLogic[®]

Trestle[™] 5.20 Release Notes

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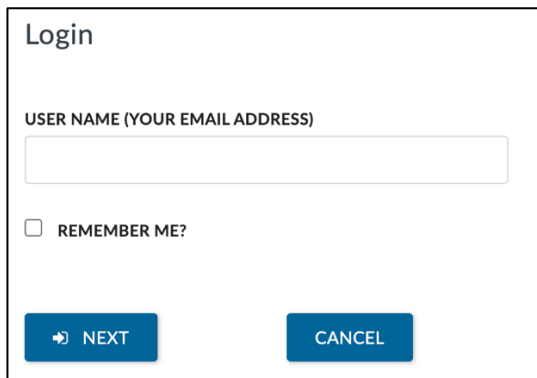
Dashboard

Trestle Dashboard Single Sign-On (SSO)

The Trestle Dashboard now supports SAML-based single sign-on. An MLO, Technology Provider, or Broker account can have their own Identity Provider (IdP) configured for use with Trestle.

Organizations with their own IdP should reach out to Trestle support (either your support rep, or by email or Slack) to begin the conversation. Trestle currently has plug-and-play support for CoreLogic Clarity, and we're ready to do the work to adapt to any other IdP that might speak slightly different SAML idioms.

The login page now loads with just the username. Enter that and click "next" (or hit return). If your account belongs to an organization configured to use Single Sign-On, you'll be redirected to your Identity Provider for authentication. If not, a password field will appear, and you can log in normally. This is the same SSO login flow used by Slack and Microsoft Office, among others.



The screenshot shows a login form titled "Login". It contains a text input field labeled "USER NAME (YOUR EMAIL ADDRESS)". Below the input field is a checkbox labeled "REMEMBER ME?". At the bottom of the form are two buttons: "NEXT" with a right-pointing arrow icon, and "CANCEL".

The Trestle Dashboard will not auto-provision accounts for new users it sees coming in from single sign-on. Account Admins will need to create Trestle login accounts for every user they want to enable for access (inside Account > User Manager). Trestle usernames are email addresses, and they will need to match the email of the SSO user. As a result, generic "bucket" email addresses like "idx@vendor.com" likely won't work for SSO.

Trestle Broker accounts can authenticate with either their own IdP if they have one, or their MLS's. This enables an MLS to put a link to Trestle onto their Clarity dashboard, for instance. MLS staff and Brokers will be able to access Trestle inside the same sign-on environment as all their other MLS-provided tools. Contact your Trestle account reps to get this all set up.

MLO: “Contractless” Connections to Broker Accounts

Trestle’s “Contractless” Connection feature enables the MLO to make a data connection with a data consumer and skip the contracting and online license fee billing part of the process. This is useful for one-off data connections where the contracting and billing are special in some way, allowing those things to be handled offline and just using Trestle for the data. (We put the word “Contractless” in quotes here because there always *should* be a contract involved, it just doesn’t get handled inside Trestle.)

This feature has been available for connections to TP accounts for over a year. Today’s release adds the ability for MLO accounts to add “Contractless” Connections to Broker accounts. *As with TPs, all Trestle fees still apply, but Trestle will not bill any MLO licensing fees for these data connections.*

Inside the “Add Connection” dialog, the first field now lists all Technology Providers with fully activated accounts, *plus all Broker accounts that have connected to your market.*

Add Connection

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

TECHNOLOGY PROVIDER OR BROKER *

--

DATA FEED *

RESO Web API Certification - WebAPI

I acknowledge that this live Trestle data connection will not 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.*

CLOSE SEND

In addition, we’ve moved the pending “Contractless” invitations from a table at the bottom of the Technology Providers tab, to a tab of its own. This tab will only appear if you have any pending “Contractless” invitations.

Technology Providers Participating Brokers Pending Invitations

ADD CONNECTION

100 RECORDS PER PAGE SEARCH

BUSINESS NAME	TYPE	INVITATION SENT	RESEND INVITATION	CANCEL INVITATION
[Redacted]	Broker	2/23/2021 12:25:57 AM	[RESEND]	[CANCEL]
[Redacted]	TechProvider	4/12/2021 6:39:05 PM	[RESEND]	[CANCEL]

MLO & TP: Contract RE-SEND button now yellow

We've changed the RE-SEND button in Contract lists from blue to yellow.

This adds some rhythm to the controls on that page, visually differentiates RE-SEND from VIEW CONTRACT, and echoes the yellow of icon used for In-Progress contracts on the dashboard front page.

	CONTRACT STATUS	SIGNING STATUS	EXECUTION DATE	
	In Progress	Pending Broker Approval		VIEW CONTRACT RE-SEND DEACTIVATE
.com	In Progress	Pending Broker Approval		VIEW CONTRACT RE-SEND DEACTIVATE

Thanks to Mike Lake from Big Sky MLS for this simple but powerful suggestion!

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!

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!