



2023 FALL FORUM

We champion a cooperative and collaborative real estate experience by focusing on Data and Solutions with Expertise.

**LENNY
LAWRENCE**

*Chairman – MLS Now Board
of Directors*

- Welcome
- Anti-Trust Statement



MLS NOW BOARD OF DIRECTORS

- Kris Burdick
- David Chervenik
- Sarah Ford
- James Fox
- Jodie Frydl
- Timothy Garton
- **Andrew Ginter - TREASURER**
- David King
- **Lenny Lawrence – CHAIR**
- Meru Maharaj
- **Brandon Marquard – VICE CHAIR**
- Kelly Minard
- Jeff Russell
- Michael Sulek
- Andrea Wilson
- Joyce Willson

MLS NOW STAFF PRESENT

4

- John Kurlich, COO
- Jennifer Welch, Executive Assistant
- Anne Petit, VP of Quality Assurance
- Dean Klunzinger, Education & Customer Service Manager
- Dan Jones, Account Executive
- Heidi Ewing, Account Executive
- Tom Bauch, Account Executive
- Cole Cooper, Tech Support & Media Coordinator

**CYNTHIA
LAMMERT**

Legal Update



FRANTZ WARD

ATTORNEYS AT LAW

Risk Management for Real Estate Professionals

Cynthia A. Lammert, Esquire

Mark L. Rodio, Esquire

Daniel P. Hinkel, Esquire

COMMERCIAL TRANSACTION CHECKLIST

- Importance of the Letter of Intent in a commercial transaction
 - Fundamental terms of the transaction
 - Binding or non-binding
- Potential Lender Requirements
 - Tenant Estoppel(s)
 - Subordination, Non-Disturbance and Attornment Agreement(s) (“SNDA”)
 - Zoning Confirmation Letter from City
 - Environmental Phase I

COMMERCIAL TRANSACTION CHECKLIST- CONT.

- Prorations
 - Rents
 - Real Estate Taxes
 - Utilities
 - Security Deposits
- Additional Closing Documents
 - Assignment of Leases
 - Bill of Sale
 - Assignment of Contracts

COMMERCIAL TRANSACTION CHECKLIST- CONT.

- Point of Sale Inspections (“POS”)
 - Seller or Buyer responsibility for repairs/violations
 - Failure to comply with City POS may result in misdemeanor
- Seller Representations and Warranties
- Acquisition Structuring Considerations for Buyer



FRANTZ WARD

ATTORNEYS AT LAW

THANK YOU

**LISA
LARSON**





**MARILYN
WILSON**

Broker Public Portal



Broker Public Portal Update

Presented by
Marilyn Wilson Lund, Managing Partner
WAV Group



Marilyn Wilson

Managing Partner | **WAV Group**

President | **RE Technology**

Chair-Elect | **National Small Business Association**

Thought Leader, Strategist, Research Expert, Change Agent

SVP Marketing, Product and Strategic Planning | **Fisher-Price**

CEO | **Surveyor Corp**

Cornell University





broker public portal

**A NATIONAL PORTAL
THAT WORKS FOR THE INDUSTRY**





broker public portal

WITH  homesnap

Brokers and MLS TIRED of
Third parties becoming THE
source of real estate for
consumers

Find a way to get FREE
LEADS and Listing Exposure
for the listing agent that
secured the listing

The Birth of a Movement

Started in 2014

Formed by Brokerages representing
300,000 agents and and MLS
representing 350,000 subscribers
including MLS NOW

Set out to create a better and more
accurate alternative to the large listing
portals

Designed with Fair Display Guidelines –
Your Listing, Your Lead





Homesnap - First Technology Solution

Broker Public Portal partnered with a national consumer brand and created a joint venture

Delivered millions of free leads and national listing exposure

Provided easy method for agents to support and engage with clients



CoStar Group™

In 2020, CoStar purchased Homesnap

Joint Venture between BPP and Homesnap was disbanded

Exit freed up previously negotiated capitol to fuel Broker Public Portal 2.0



A city skyline at dusk, featuring a river in the foreground and various skyscrapers in the background. The text "Broker Public Portal 2.0" is overlaid in white. A small white horizontal line is positioned below the text.

Broker Public Portal 2.0

Supporting Broker Profitability



- Provide meaningful ways for agents to nurture clients and prospects
- Your Listing, Your LEAD – NO Referral fees
- Broker branding
- Ability for brokers to promote ancillary services on their own listings as desired
- BROKER-directed data control

What's the scope?

- **National data coverage** with MLS and brokerage partnerships from leading markets
- Integration with strong existing MLS consumer sites
- **Integration with OneHome** to deliver national prospecting and referral opportunities
- **Brand new technology** for website and mobile app
- Designed to **deliver the insights consumers demand** today
- **Connect agents and clients** directly and easily



What's next?

- CEO search nearly complete
- 30 proposals for technology solutions and public records-based data received and reviewed
- Build and launch new broker-directed marketing platform





Subscribe to the FREE WAV
Group newsletter

<https://www.wavgroup.com/newsletter/>

Marilyn@wavgroup.com

**TOM
BAUCH**

System Updates

ATTRIBUTION - ADDED IN MAY

The screenshot shows the top navigation bar of the MLS Now website. The 'Office' menu item is highlighted in yellow, and its dropdown menu is open, with 'Our Branch Offices' also highlighted in yellow. Other menu items include Residential, Residential Detail, Rental Beast, Matrix Rentals, Multi-Family, Lot/Land, Commercial, Cross Property, Cross Property Detail, Staff CP Full Search, Agent, Open House, and another Open House item. A search bar is visible with a question mark icon and the text 'Enter Show...'. The 'MLS NOW' logo is in the top right corner of the navigation bar.

The screenshot shows the 'Our Branch Offices' section of the website. It features a 'Status' dropdown menu with options: Active, Inactive, Suspended, and Terminated. A radio button is selected for 'Active'. To the right, there is a text input field for 'Our Main Office ID' containing the value '9995'. Below the filter, there is a button labeled 'Click Results below to view all branch offices.' At the bottom, there is a search bar with a 'Clear' button, the text '1 matches', and a 'Results' button.

ATTRIBUTION IS SET FOR EACH BRANCH OFFICE ID

Previous		Next		· 1 of 1		Checked 0		All · None · Page	
<input type="checkbox"/>	#	Office ID	Office Name	Attribution Default	Allow Override				
<input type="checkbox"/>	1	9995	MLS Now	Office Email, Office Phone	No				

[Actions](#) [Refine](#) [Save](#)

[Criteria](#) [Print](#) [Stats](#) [Export](#)

+ Input

Listings

[Add new](#) or [Edit existing](#) Listings

Quick Modify:

Select a Listing or type [Edit](#)

Roster

[Add new](#) or [Edit existing](#) Agent Roster

Quick Modify AGENT Info:

[Edit](#)

Office

[Add new](#) or [Edit existing](#) Office Roster

[Edit](#)

SELECT DEFAULT FOR ALL BRANCH OFFICE LISTINGS

+ Attribution Contact

Office Attribution Information

To update office website, phone or email please send request to Membership@MLSNow.com

Office: 9995 - MLS Now (Independence)

Website: www.MLSNow.com

Office Phone: (216) 485-4100 **Office Email:** Help@MLSNow.com

Choose below the attribution contact (this will be set for every office listing) AND if you will allow your agents to override to a different phone/email than your selected default.

****If you have branch offices, you will need to repeat the steps for each office ID. ****

Attribution Contact *
(max of 2 selections)

Agent Email ?

Agent Phone

Office Email

Office Phone

Allow Agent Override (per listing) to a different attribution phone/email?*

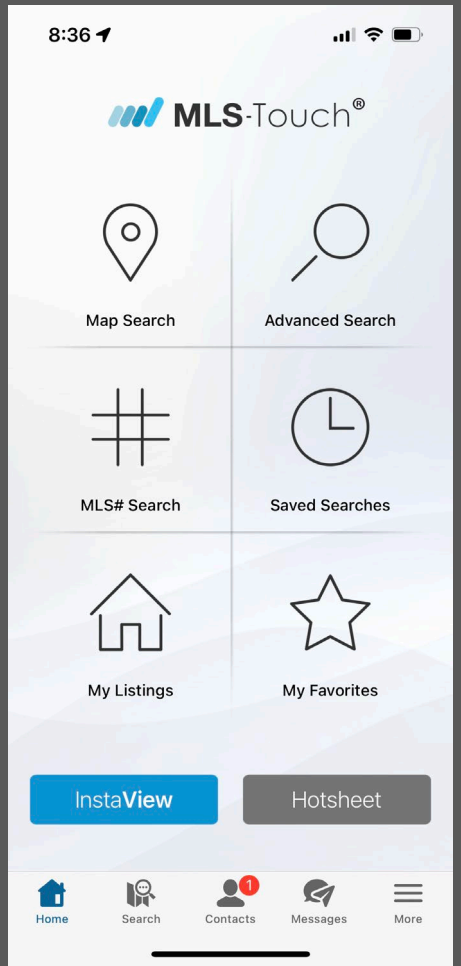
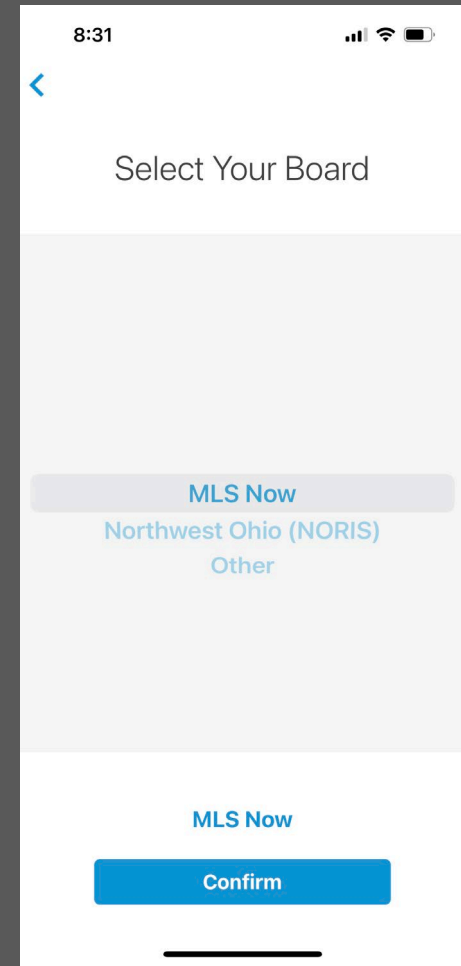
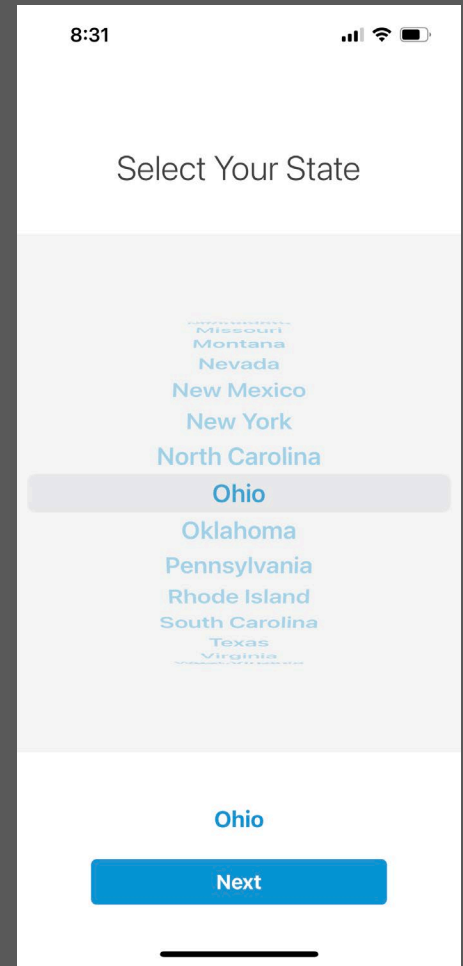
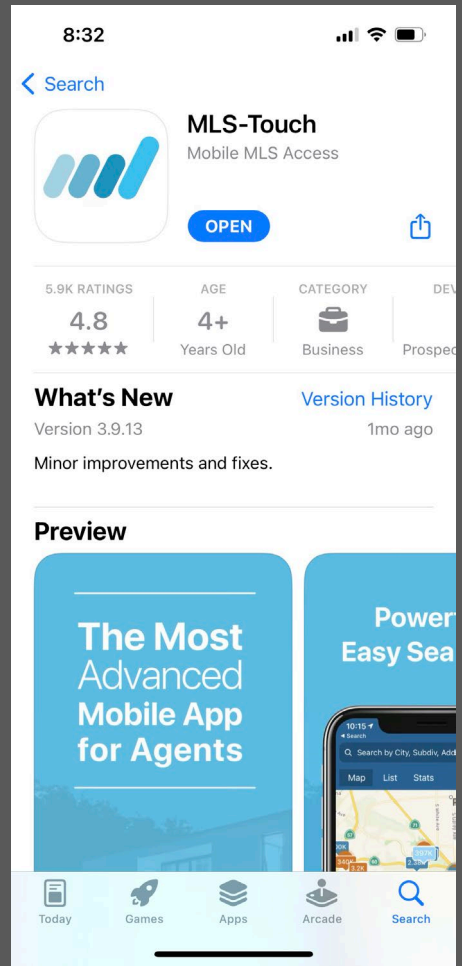
No v ?

Validate
 Cancel Input
 Submit Office

MLS TOUCH – ADDED IN MAY

FITS PHONE SCREEN! SAVES LOGIN! FAST!

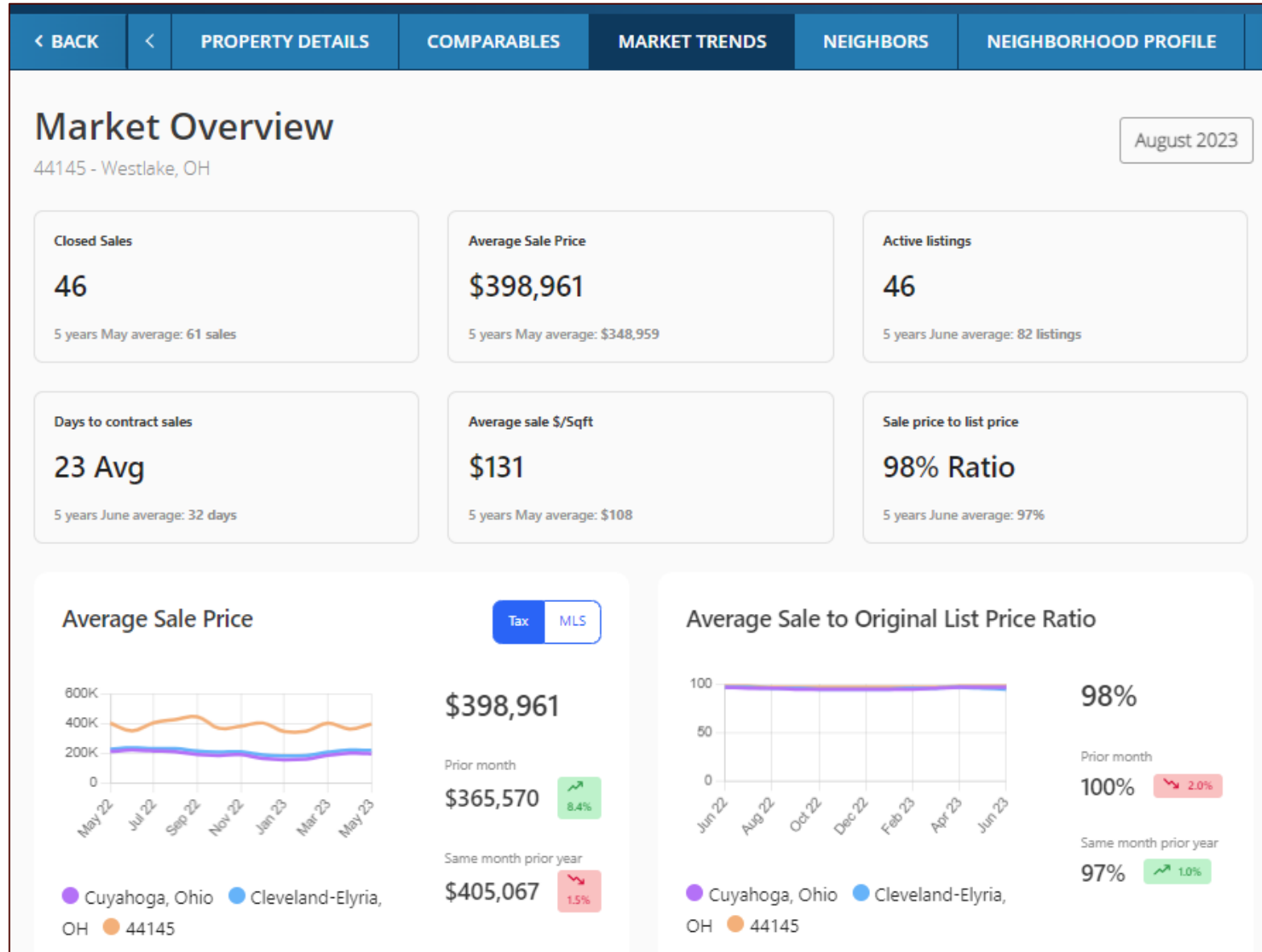
Over 4900 agents have installed the MLS Touch app and are enjoying the benefits! Have You?



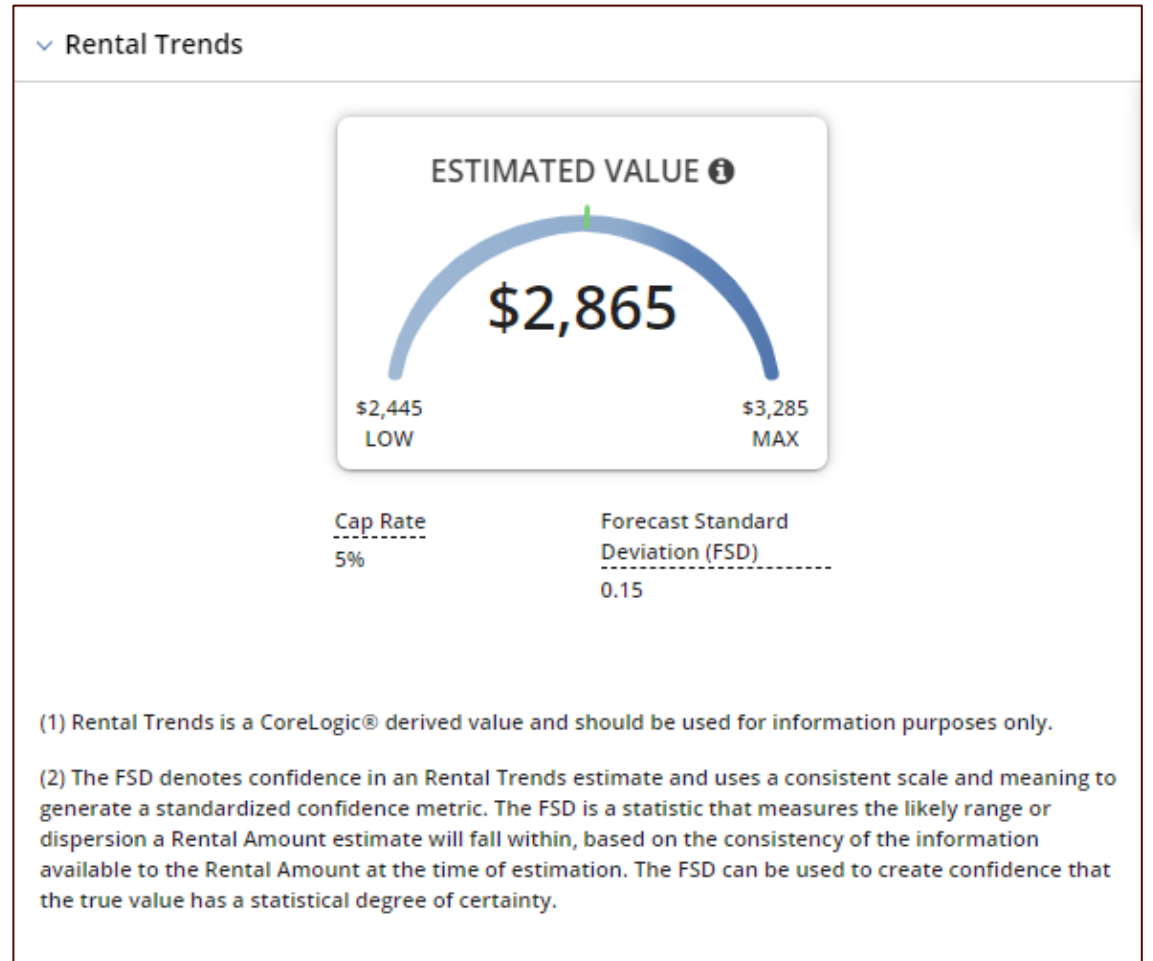
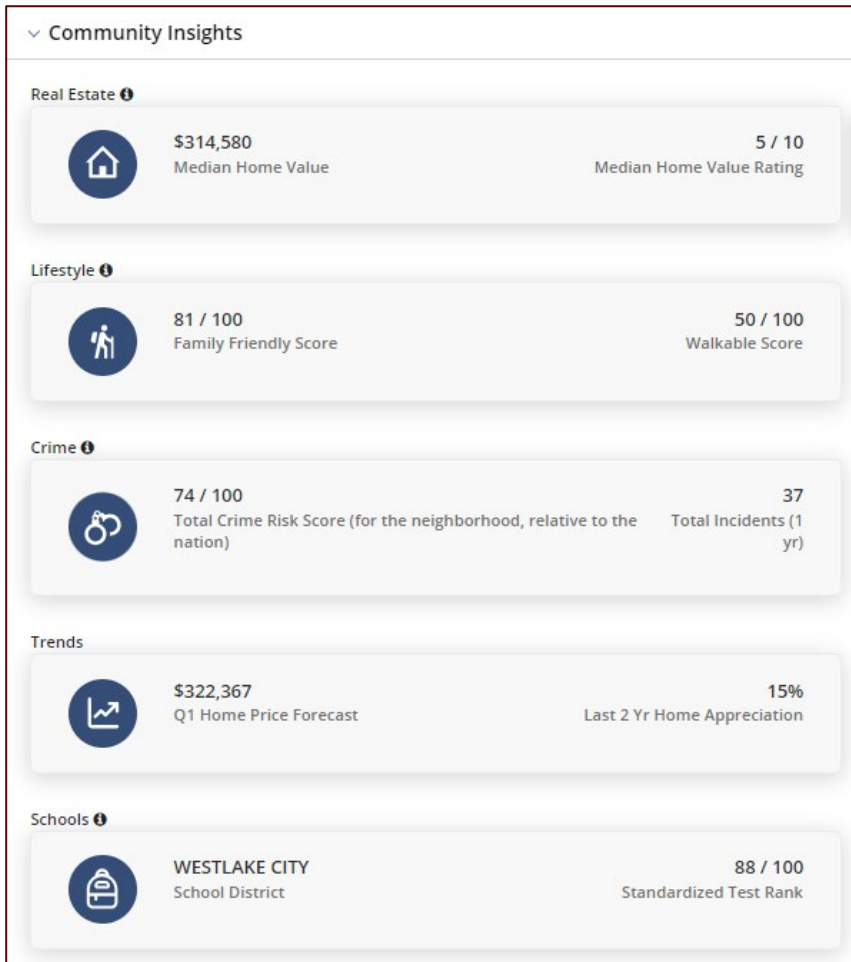
- INSTAVIEW
- TEXT listings
- EDIT basics (price, status, remarks if have input access)
- SAVED searches & CARTS sync from Matrix
- View Contacts and FAVORITES
- STATS in every search
- MAP to see listings near your location
- BRAND & SHARE
- SCHEDULE appointments

MLS TOUCH FEATURES

MARKET TRENDS UPDATED IN AUG.



REALIST – INSIGHTS & RENTAL TRENDS ADDED IN SEP.

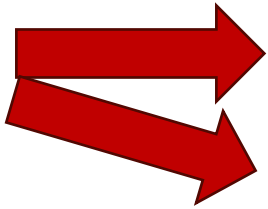




Real Estate Standards Organization – data dictionary standards will be coming to Matrix in November.

Property Type standards:

MultiFamily  Residential Income

Commercial  Commercial Sale
Commercial Lease

Rentals  Residential Lease

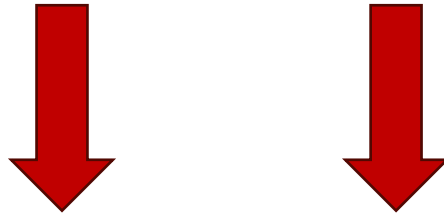
Examples of Standard names:

1. Listing ID – MLS Number
2. Special Listing Conditions – Ownership
3. Listing Terms – Available Financing
4. Property Attached YN – Dwelling Type (attached/detached)
5. Construction Materials – Exterior
6. Property Condition – Year Built Detail (Exception)
7. Private Remarks – Broker Remarks
8. Showing Requirements – Showing Instructions
9. Buyer Agent – Selling Agent

NEW FIELDS

- Tax Year
- Year Built Source
- Description (per room)
- Fireplace Features
- Windows
- Accessibility Features
(Accessible Doors, Accessible Entrance,
etc)
- Carport
- Foundation
- And More...

CHANGES TO MATRIX TOP MENU



The screenshot displays the top navigation bar of the MLS Now website. On the left is the **MLS Now** logo, which consists of a white cloud with a red house silhouette inside. To the right of the logo is a horizontal menu with the following items: **MY MATRIX** (underlined), **SEARCH**, **ROSTER**, **STATS**, **TAX**, **FINANCE**, **MARKET REPORTS**, **INPUT**, and **HELP**. Below the menu is a search bar with a question mark icon on the left and the placeholder text "Enter Shorthand or MLS#". At the bottom of the page, there are three tabs: **News & Alerts**, **Now You Know**, and **Search**.

CHANGES TO MATRIX INPUT

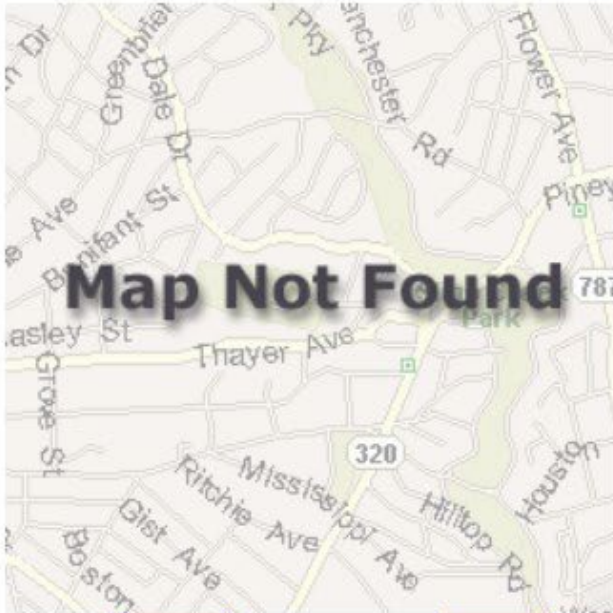
 Add New Property

Select Form

Residential
Land
Residential Income
Commercial Sale
Commercial Lease
Residential Lease

 Cancel

Location Information



Street #



Dir Prefix



Street Name



Street Type



Dir Suffix



Unit Number



State



County



City



Zip Code



Zip +4



Township



Subdivision/Complex



School District



Latitude



Longitude



[Update Map](#)

[Get Lat/Long from address](#) [Set Lat/Long manually](#)

[Choose Google Street View](#)

*** To set the latitude and longitude, click "Set Lat/Long". On the map click where the property is located, adjust the blue pin, then click Done.**

NEW BUTTON – SAVE AS INCOMPLETE

+ Residential

Location Agent/Office Listing/Contract Association Legal/Tax Rooms Features Remarks Showing Matrix Testing

List Agent/Office Info

List Agent Bugs Bunny (BBUNNY) Confirm	Agent Name and Info Bugs Bunny 888-888-8888 BBUNNY@Mailinator.com	Office Name and Info ID: WATERTOWER01 Water Tower Realty 888-555-5555
Co List Agent <input type="text"/> Agent Name or ID Confirm	Co Agent Name and Info	Co Office Name and Info
Attribution Contact <input type="text"/> ?	Attribution Override <input type="text"/> ?	

Save as Incomplete Validate Cancel Input Submit Property

Location

Agent/Office

Listing/Contract

Association

Legal/Tax

Rooms

Features

Remarks

Showing

Matrix Testing

Remarks

Public Remarks - Customer View

Decreasing from 1500 to standard 1000 characters max.



Characters Remaining: 1000

Private Remarks - Members Only



Characters Remaining: 1000

UPDATES TO SEARCHES & DISPLAYS

[Previous](#) [Next](#) · 7 of 8 Checked 0 All · None · Page Agent Single Line display Display Agent Full ▼

2844 Waterfall Way, Westlake, Ohio 44145

[Listing](#) [Photos](#) [History](#) [Open House](#)

MLS#: **4441049** Prop Type: **Residential** Close Price: **\$1,050,000**
 Status: **Sold** Sub Type: **Single Family Residence** List Price: **\$993,000**
 DOM/CDOM: **4/4**



List Date: **03/02/2023**
 Twp: **Westlake**
 Unit:
 County: **Cuyahoga**

List Dt Rec: **03/03/2023**
 Pend Dt: **03/06/2023**
 Off Mkt Dt: **03/06/2023**
 Close Dt: **04/21/2023**
 Contg Dt:
 Exp Dt: **06/02/2023**

Parcel ID: [216-04-053](#)
 Addl Parcel:
 Subdiv: **Lake Forest Ph 04**
 School Dist: [Westlake CSD - 1832](#)
 Bedrooms: **4**
 Total Baths: **5 (3 2)**
 Yr Built: **2013**
 Liv Area: **5,210**
 Acres: **0.4320**
 Photo Opt Out: **No**

Stories: **2**
 Levels:
 \$/SqFt: **\$201.54**
 Map:

1 / 35 🔍 📄 ▶

Directions: **West of Bradley Rd., North of Schwartz Rd.**

CONVERSION


- Entry in the current site will “stop” the day before.
- All data will transfer to the updated site overnight.
- Login will be the same on conversion day.
- We will suggest that everyone clear their cache.
- We will ask everyone to review their listings & auto emails and make sure all criteria is correct. (Especially Commercial that are split)
- If they would like to add any of the new items to their listings, they can go to the new input pages to update.


CHANGES COMING IN 2024⁴⁴


- Members added after January 1st will be assigned a **random** Member ID#
- The Login to the MLS will no longer be the license# for **NEW** members **ONLY**
- Listings will show their Name (Member ID) and License #

Agent/Broker Info

List Agent: [Michael J Sivo \(391676\)](#) 
Contact #: 440-669-0133
LA Email: sivosells@aol.com
LA License #: 2002002945

List Office: [RE/MAX HomeSource \(2633\)](#) 
Office Phone: 440-951-2500
Office Fax: 440-951-2502
Address: 28915 Chardon Road, Willoughby Hills, OH 44094

Buyer Agent: [Andrey Godes \(2018006158\)](#) 
Contact #: 440-796-0460
BA Email: andrey.godes@gmail.com
BA License #: 2018006158

Buyer Office: [Keller Williams Living \(9181\)](#) 
Office Phone: 440-318-1620
Office Fax: 440-318-1670
Address: 32875 Solon Road, Suite 100, Solon, OH 44139

New Dashboard – coming in 2024

Good Morning 🔄 ⚙️ ⏪ **Dashboard** Edit Dashboard

FIRST PORTAL VISIT Tuesday


🌐 Lois Lane visited their client portal for the first time ⋮

NEW SAVED SEARCH Tuesday

🔍 071221 Test saved a search ⋮

[Shiloh Saved search Sep 19, 2023](#)


NEW NOTE Tuesday

📄  071221 Test added a note to a property ⋮

617 Main Street


"Good price but too far away."

DISCARDED PROPERTY Tuesday

🗑️  071221 Test discarded a property ⋮

22 E Main Street

NEW FAVORITE Tuesday

❤️  071221 Test added a favorite property ⋮

227 E Main Street

News & Alerts

Sep 18 - Standard Maintenance Patching

Sep 14 - Matrix 360: 360 CMA

My Favorite Searches

🔄

Dayton Schools Manage

Land 0.5+ acres Manage

Search

Listing ▼

MLS Number

Street Number

Street Description Select

Street Name

▼

Search

Hot Sheets

🕒 ⚙️

Cross Property

Residential

Recent Use Contacts

Lane, Lois

Test, 071221

My Carts

Lane, Lois - 15k or less per acre 18

Test, 071221 - sep cart 6












New Features 2024

Edit Dashboard Widgets

Edit Dashboard



Add, remove, and reorder items on your dashboard

- News & Alerts 
- My Favorite Searches 
- Hot Sheets 
- Search 
- My Carts 
- Contact Requests 
- My Listings 
- My Stats 
- Recent OneHome Visitors 
- Recent Use Contacts 
- External Links 

New Features 2024

Timeline Settings



Select the notifications that appear in the Timeline. Go to Settings for more notification options

- Visits Portal
- Saves a Favorite
- Removes a Favorite
- Discards a Listing
- Un-discards a Listing
- Adds Notes
- Saves a Search
- Visits Portal First Time
- Updates Planner
- Text Opt-in
- Email Unsubscribe

Cancel

Save

WHAT TO DO!

- Encourage all to **READ** News messages
- **WATCH** a webinar (live or recorded)
- **Webinars: 10/5, 10/12, 10/30 @ 2:00pm**
- **UNDERSTAND** the changes coming

REMINDERS

- Update us immediately with changes to **agents/admin/UPA** by emailing **Membership@MLSNow.com**
- Respond quickly to any Quality Assurance **audit** requests at **QA@MLSNow.com**
- Email questions on Matrix to **Help@MLSNow.com**

ANNE PETIT

VP of Quality Assurance

JOHN KURLICH

COO

QUALITY ASSURANCE UPDATES



RECAP FROM SPRING FORUM:

- May 2023 – 1st phase of **restb.ai** was implemented with our Corelogic Listing Data Checker (LDC).
- MLS staff began using this **artificial intelligence** software to monitor listing photos for compliance with MLS Now rules.
- MLS staff are notified if items are found in listing images that violate our photo rules (visible sign in yard, people in the photo, text or phone numbers added to an image, watermarks, etc).
- You will receive an email notification if corrections/updates are required on your photos.



REMINDER – WHAT TO DO (*and NOT to do*):

- Add **front** photo within **2 business days** of entering listing in Matrix. MLS Now has several placards available in Matrix Links for:
 - “To Be Built”
 - “Vacant Land”
 - “New Construction”
 - “Seller Opt-Out of Photos”
- Follow all MLS Now photo **rules** (detailed on following two pages)
- Watch for email notices from Quality Assurance and promptly **correct** any issues to avoid a penalty.
- ***Do not use someone else’s photos unless you have written permission.***



WHAT'S NEW?

- News announcement of August 22nd
- ALL existing and new photos being “tagged” as of August 23rd.
- What does “tagged” mean?

The screenshot shows the restb.ai photo upload interface for a property at 123 Main St, Cleveland, OH. The interface includes a 'Browse...' button, a checkbox for 'Auto-generate descriptions on upload using restb.ai', and a 'Check All' checkbox. Two photo slots are visible: 'Primary slot*' and 'Slot: 2*'. The 'Primary slot*' contains a photo of a house with the caption 'Front of Structure' and 'View of front of property with a front yard'. The 'Slot: 2*' contains a photo of a staircase with the caption 'Other'. A dropdown menu is open for the 'Slot: 2*' photo, showing a list of tags including 'Aerial View', 'Atrium', 'Attic', 'Back of Structure', 'Balcony', 'Bar', 'Barn', 'Basement', 'Bathroom', 'Bedroom', 'Bonus Room', 'Breakfast Area', 'Closet', 'Community', 'Courtyard', 'Deck', 'Den', 'Dining Area', and 'Dining Room'. The 'Select Caption...' option is highlighted. Below the photo slots, there is a certification section titled 'IMAGE UPLOAD CERTIFICATION' with a 'Certify and Save' button.

Tag = Photo
Caption



WHAT TO DO:

- For existing listings -
 - Check image names and descriptions on all listings; and
 - Update as needed.
- For new listings entered on/after Aug. 23rd
 - Review all generated photo captions & descriptions;
 - Update as needed; then...
 - Click, Certify and Save.

RULES TASK FORCE

- Board of Directors approved creation of TF at August meeting
- Make-up of TF
 - Directors
 - Brokers
 - Salespeople
 - MLS Now Staff
- Projected September kick-off
- Goals & Objectives
- Currently compiling recommendations for changes to rules

NEW RULE!

Listing Falsification Policy

- Board of Directors adopted it under MLS Now Rule 2.5
- Addresses “recklessly and/or purposely” falsifying listing information
- Must have valid listing agreement:
 - Signed & authorized by owner(s) of record; or
 - Owners’ lawfully authorized agent/representative.
- If listing, ensure seller client is the owner of record at the auditor’s site.
- Reporting a sale/closing a listing:
 - Ensure sale date you’re entering is the *property transfer date* on auditor’s site; or
 - As shown on the settlement statement (Some exceptions apply, see appropriate rule or contact QA).

THANK YOU

Breakfast today sponsored by



MLS Now



PRIZE GIVEAWAYS

Must be present to win