Listing Broker Attribution V2

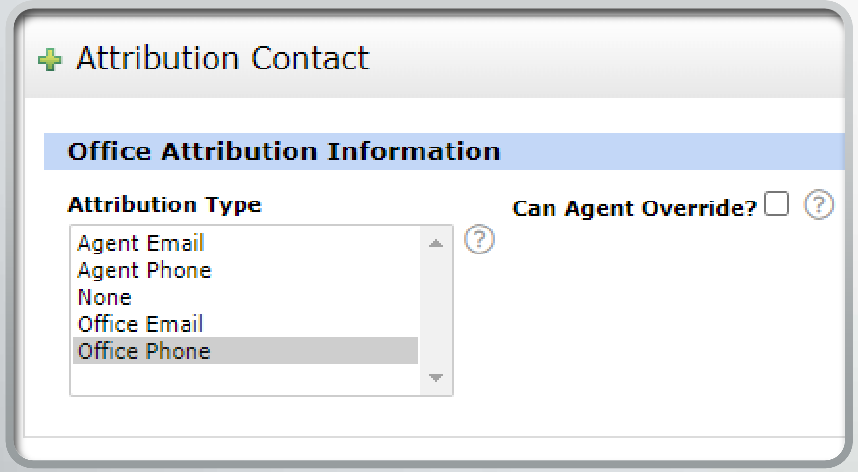
Updated 8/30/2022

NAR Policy

- *An MLS Participant's IDX and VOW display must identify the listing firm, and the email or phone number provided by the listing participant in a reasonably prominent location and in a readily visible color and typeface not smaller than the median used in the display of listing data.*

NAR FAQ For additional details: https://www.nar.realtor/about-nar/policies/2022-mls-policy-changes-faq

Solution



Simulates IDX Opt In/Out by a broker, but with a picklist selection of the phone number or email address.

Step 1 – Field Creation

- Add 2 fields to the *Office* table:
  - **AttributionType -** Values are:
    - Office Phone
    - Office Email
    - Agent Phone
    - Agent Email
    - None
    - *Only one of the options can be chosen. (Single Select)*
  - **AttributionAgentOverrideYN:** This field gives the Broker the choice to allow List Agents to override the default value on a Listing-per-Listing basis.

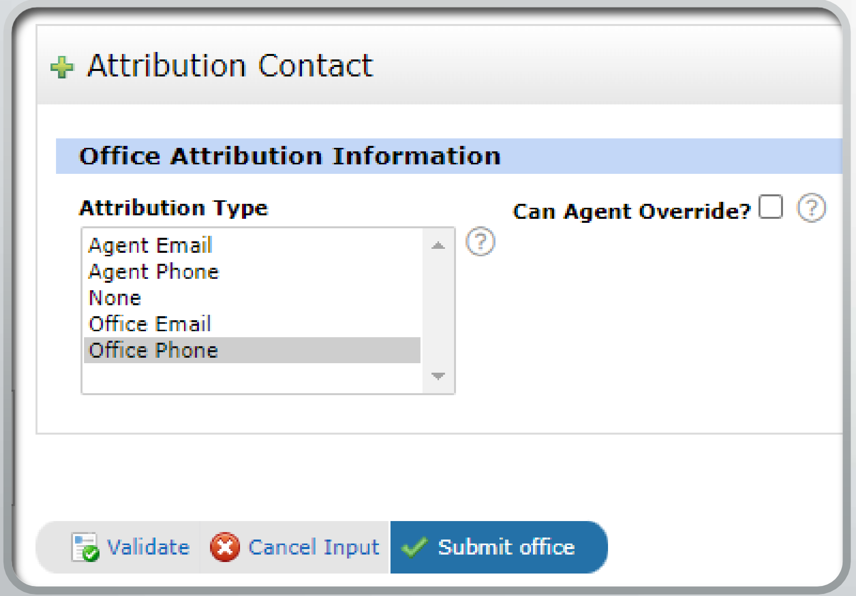
Step 1 – Field Creation

- Add 2 fields to the Listing/Property table:
  - **AttributionContact**
    - This is the column that will contain the Email or Phone based on the Office Attribution Type selection. *This is the official field to be used by IDX and downstream vendors to show the required info on their site.*
  - **AttributionContactOverride**
    - This will be used in the use case where Agents are permitted to override the Broker default on a Listing-per-Listing basis if allowed. Any value entered in this field will replace the default value in the AttributionContact field. AttributionContactOverride should not go out via RETS.

Step 2 – Input Actions in Matrix

- An Input Action needs to be added to put the chosen item into the Listing.
- When listings are submitted, it will check the Attribution Type in the Office record. Then the appropriate value will be inserted into the **AttributionContact** column in the Listing.
  - i.e. If AttributionType says "Agent Phone", then the phone number from the Listing Agent will be put in the field – 555-555-5555.
- An Input Action is also needed if the Office or Agent record is changed. The On Market Listings under that Office will then be updated with the new data accordingly.
  - Email and Phone changes in either the Office or Agent record will trigger this update.

Step 3 – Office Input for Brokers



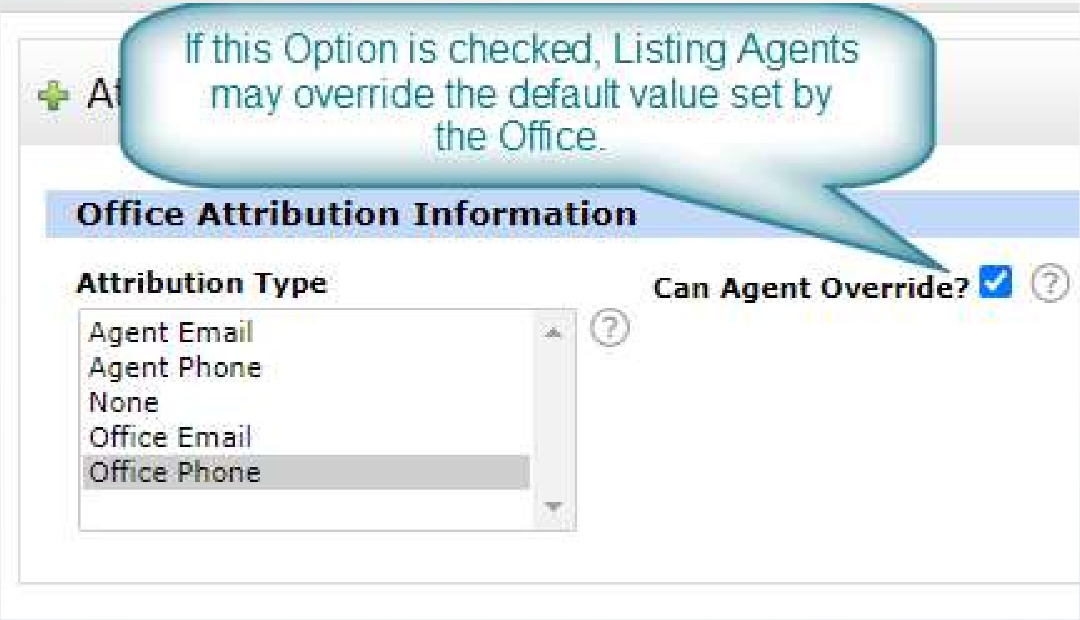
- An option to edit the **AttributionType** will be on an Input form only visible for Brokers to modify. The form is used to select the Attribution Type for a given Office.
- This step may not be required if the Attribution Type is populated via the Roster Management Software of the client. (MMSI, Growthzone, Rapattoni, etc.)
- If the data exists in the Roster Management System, the Matrix Roster ETL needs to be modified to map this incoming data.

Step 3.5 – Determine with MLS if Broker allows Agent overrides for Attribution Contact

- An option to edit the **AttributionContact** on a Listing-per-Listing basis by the List Agent is possible assuming the Broker allows this.
  - Add the **AttributionAgentOverrideYN** field to the "Office Information for Listing Attribution" form.
  - If this field is checked, it implies that even though the Broker may have set a default, the List Agent can override the default value on the Listing level.
  - Add the **AttributionContactOverride** field to the main Listing Form.
  - If a specific Broker does not allow the override, the **AttributionContactOverride** field will be unavailable and greyed out on the Input Form.

Step 3.5 – Determine with MLS if Broker allows Agent overrides for Attribution Contact

Office Add/Edit



Listing Add/Edit

Step 4 – Backfills and Defaults

- It is recommended to set a **default** choice for **AttributionType** in the Office record.
  - "Office Phone" is the default but can be adjusted if needed.
- This allows all offices to have a value and Brokers do not have manually edit their Office records.
- Roster ETL's should be edited to set default value for new offices.
- Backfills
  - Backfill Office records with Default
  - Backfill On Market Listings with Default
  - Do not touch Time Stamps in Listings. None of the RETS users downstream even know about this field or would be pulling it in their feeds. Touching timestamp does nothing in this case.

Step 5 - Communications

- Communicate to Brokers the default value and if they want to change it, provide information on how to change it.
- Recommended to include screenshots as many brokers do not typically use Input.
- Communicate to Agents this is happening, as they will wonder why information will be on websites that was not there before.
- Communicate to RETS customers that this is happening, provide deadline for compliance. *They will have to repull listings to get the information.*