



# Working Title

Cross-Platform Interoperability  
Workgroup



# The 'Score' for Today

- Meet our new Vice Chair
- Moving along the Mission
- Diagram of a Transaction
- Supporting a RESO Event Model
- Implementations in the Wild
- Mapping out the industry
- We Need You!





## Catharine MacIntosh

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- Vice-chair, Cross Platform Interoperability for RESO
- Founder and CEO at Real Estate Dot Love, Inc.
- Canadian, but not sorry about being passionate about the real estate consumer
- Sees the real estate experience as art, waiting to be sculpted







# Chris Haran

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- Chair, Cross Platform Interoperability for RESO
- CTO, MRED
- Working on the interoperability problem for over 12 years (even before he knew how to pronounce it)
- Enjoys taking candid (in no way staged) photos outdoors





# On a Mission

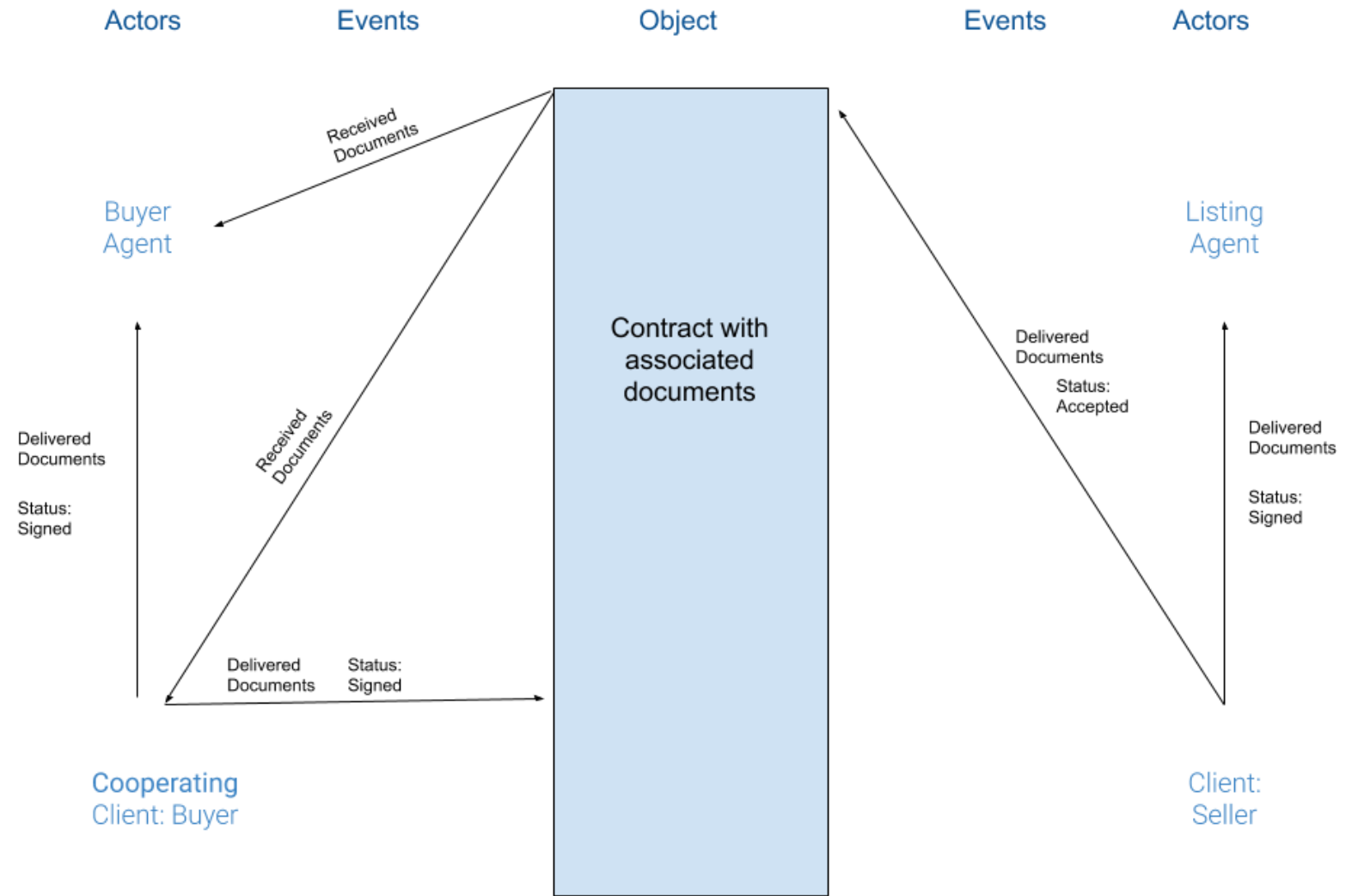
...to identify, through relevant business challenges and needs, solutions that will bring together disparate systems to better serve the real estate industry, especially the practitioners and brokerages.



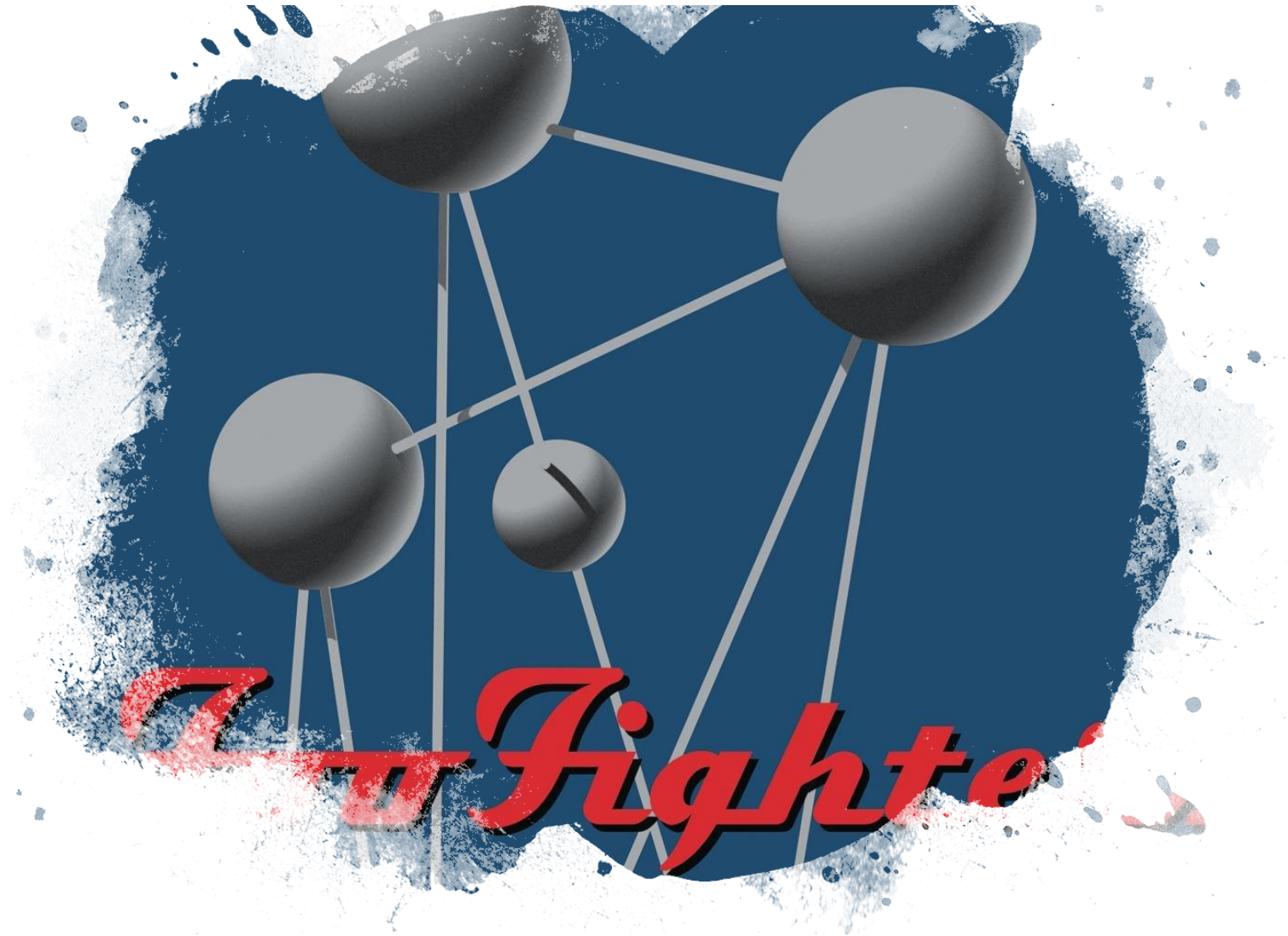


**Fixing your FOMO on Interoperability**

# Diagram of a Transaction



# Event Model





# RESO Proposed Standard Event Model

Who	What	Where	Why	When	How
<b>Appraiser</b>	Property	Appraiser System	TM: Appraised	2020-08-01T21:37:58+00:00	Data: Link to Report
<b>TM Coordinator</b>	Property	TM System	TM: Listing Agreement Signed	2020-08-02T11:37:58+00:00	Data: Link to Contracts and Documents
<b>Member</b>	Property	MLS	HT: Property Listed	2020-08-03T01:37:58+00:00	Data: Listing Record
<b>Member</b>	Property	MLS	HT: Price Changed	2020-08-10T11:37:58+00:00	Data: Price Change Info
<b>Consumer</b>	Property	Portal Vendor	IT: Listing Viewed	2020-08-10T01:37:58+00:00	Data: Tracking Info (number of views)
<b>Consumer</b>	Property	Portal Vendor	IT: Listing Viewed	2020-08-11T13:37:58+00:00	Data: Tracking info (number of views)
<b>Member</b>	Property	Showing System	TM: Property Shown	2020-08-11T11:37:58+00:00	Data: Showing Info
<b>Member</b>	Property	Lockbox System	TM: Lockbox Opened	2020-08-11T14:37:58+00:00	Data: Lockbox Info
<b>TM Coordinator</b>	Property	TM System	TM: Contract Signed	2020-08-11T22:37:58+00:00	Data: Link to Contracts and Documents
<b>Member</b>	Property	MLS	HT: Sold	2020-08-12T23:37:58+00:00	Data: Final Listing Data

**GET /EventModel('12345')**

```
{  
  TransactionId: "12345",  
  EventSubject: "42",  
  SubjectType: "Property",  
  SystemType: "MLS",  
  Entity: "Client",  
  Event: "Favorited",  
  State: "Recorded",  
  Recorder: "100",  
  Timestamp: "2020-07-  
31T20:40:11+00:00",  
  Application: "200"  
}
```





# Interop TM Event Model

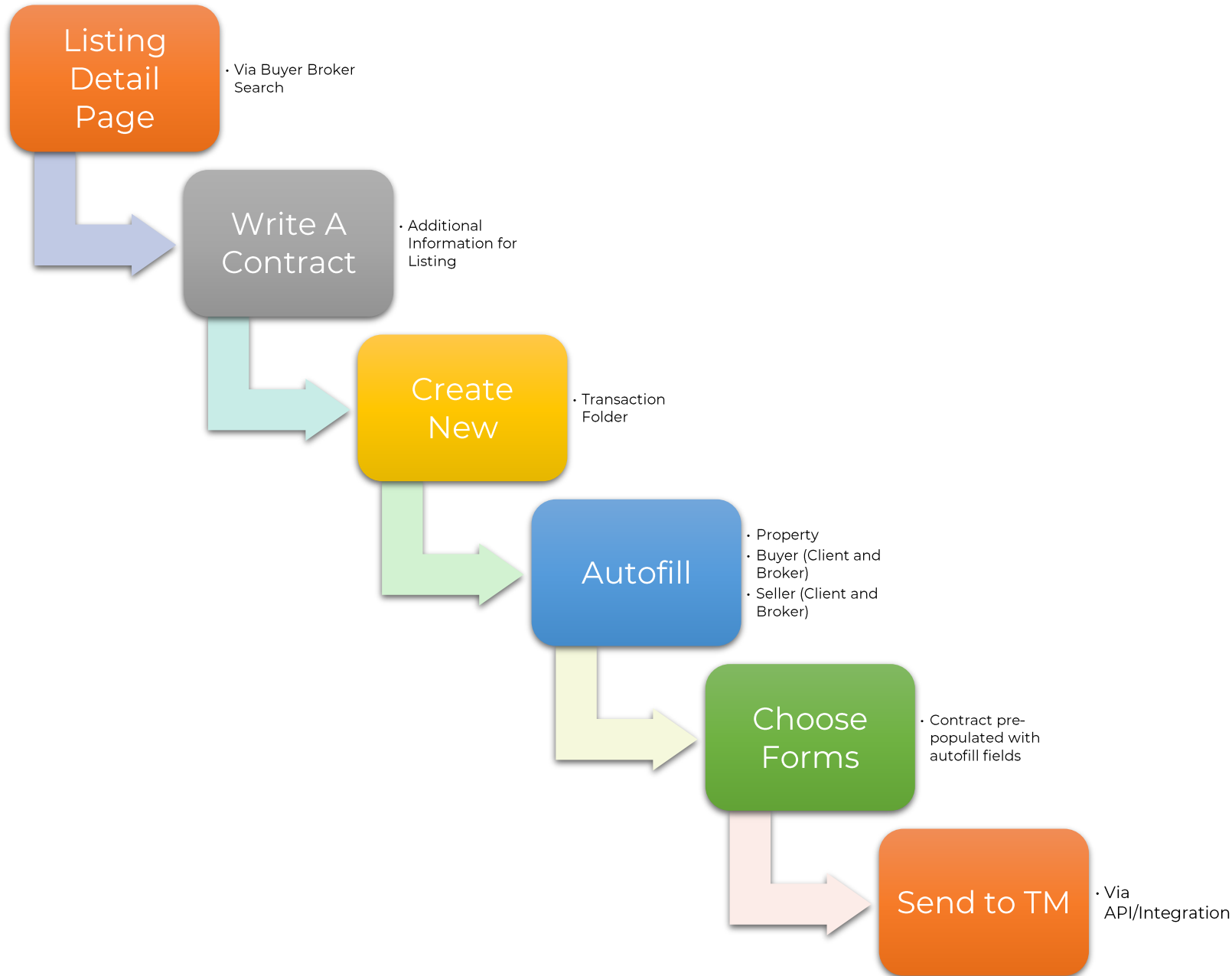
Who (Actors)	What (Transaction)	Where (System Type)	Why (Event/Task)	When	How
Member (Buyer Agent)	Transaction	TM System	TM: Offer Submitted		
Attorney	Transaction	TM System	TM: Offer Changed		
Member (List Agent)	Transaction	TM System	TM: Offer Countered		
Client (Buyer)	Transaction	TM System	TM: Offer Signed		
Client (Seller)	Transaction	TM System	TM: Offer Signed		
Mortgage (Loan Officer)	Transaction	TM System	TM: Received		

# FLEETWOOD RUMOURS



Implementation  
'Rumours'





## What fields are autofilled?

- MLS #
- Street #, Name
- City
- State
- Zip
- Unit #
- Buyer Name/Address/Phone/Email
- Broker: Company Name, Office ID, Office License #, Agent ID, Agent License #
- Office Address components
- Agent Phone/Mobile/Email
- Attorney
  - Address
  - Phone/Mobile
  - Email
  - Fax
- Loan Officer
  - Name
  - Phone
  - Fax
  - Email
  - Company Address/Phone

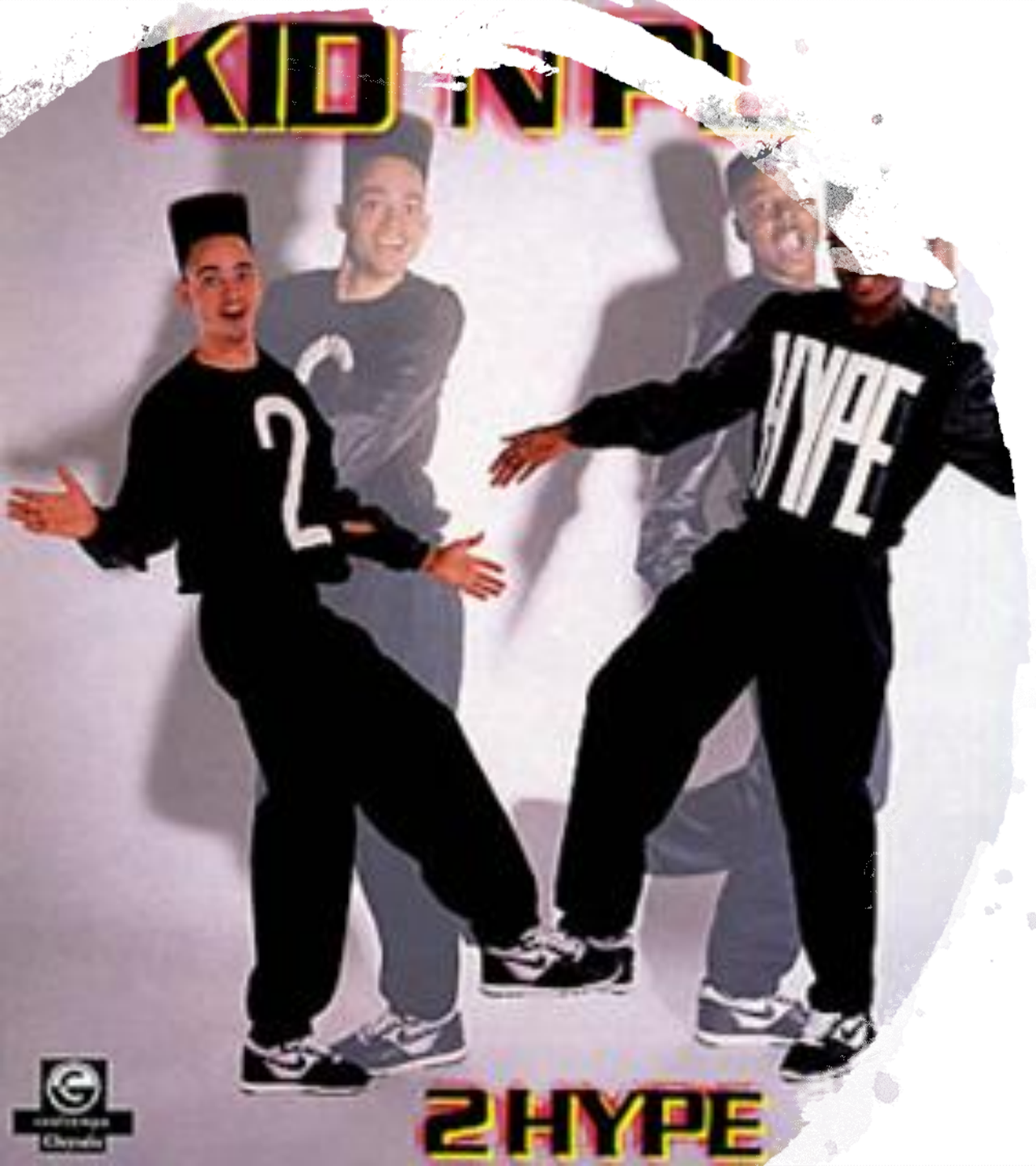
# Interop TM Resource Working File

	A	B	C	D	E	F	G
1	StandardName	Definition	StandardType	StandardLength	Groups	Lookup	Lookup
2	ActorType	These roles are typically involved in a transaction, requiring a level of access or permission.	StringList, Multi	150	ActorGroup	ActorType Lookups	Open wi
3	MemberType	This represents the type of member (i.e., agent, broker, office manager, appraiser, photographer, assistant, MLO, REALTOR®, association staff, MLS staff, etc.).	StringList, Single	50	ActorGroup	MemberType Lookups	Open wi
4	TeamMemberType	This is the role of the member within the team (i.e., team lead, principle, associate, assistant, etc.).	StringList, Multi	50	ActorGroup	TeamMemberType Lookups	Open wi
5	DocumentStatus	This represents the statuses a document could be in during a transaction.	StringList, Multi	150	EntityEventGroup	DocumentStatus Lookups	Open wi
6	TaskType	This represents tasks used during a transaction, commonly associated with a checklist feature.	StringList, Multi	255	EntityEventGroup	TaskType Lookups	Open wi
7	Permission	This is the level of access attached to an action, a document, a user, etc.	StringList, Multi	255	Media Resource	Permission Lookups	Open wi
8	NewConstructionTasks						
9							
10							

LookupField	LookupValue	Definition	References
ActorType	Client	This is the consumer of the agent who has initiated the transaction, typically either the buyer or seller.	<a href="https://ddwiki.reso.org/display/DDW17/C">https://ddwiki.reso.org/display/DDW17/C</a>
ActorType	Cooperating Client	This is the consumer of the cooperating agent in the transaction, typically either the buyer or seller.	N/A
ActorType	Mortgage	Lender or other role that supports the mortgage obligations of the transaction.	N/A
ActorType	Attorney	Supports the legal obligations of the transaction.	N/A
ActorType	Power of Attorney	Has the authority to act for the client in all legal or financial matters.	N/A
ActorType	Trustee	Has property administration control or powers.	N/A
ActorType	Supervisory	Has a supervisory role not otherwise defined by Power of Attorney or Trustee.	N/A
ActorType	Title	Supports the title obligations of the transaction.	N/A
ActorType	Insurance	Supports the insurance obligations of the transaction.	N/A
ActorType	Inspector	This person supports the property inspection obligations of the transaction.	N/A
ActorType	Financial Advisor/Accountant	This person represents the client's financial interests.	N/A
ActorType	Banks/Asset Managers	May also be the client or otherwise have property ownership interests in the transaction (typically used for lender-mediated properties).	N/A
MemberType	Assistant	The member is an assistant. The status of the assistant being licensed is not known or possibly not required.	<a href="https://ddwiki.reso.org/display/DW17/A">https://ddwiki.reso.org/display/DW17/A</a>
MemberType	Association Staff	The member is a member of the association's staff.	<a href="https://ddwiki.reso.org/display/DDW17/A">https://ddwiki.reso.org/display/DDW17/A</a>
MemberType	Designated REALTOR Appraiser	The member is a designated appraiser and a member of the National Association of REALTORS®.	<a href="https://ddwiki.reso.org/display/DDW17/D">https://ddwiki.reso.org/display/DDW17/D</a>
MemberType	Designated REALTOR Participant	The member is a designated broker and a member of the National Association of REALTORS®.	<a href="https://ddwiki.reso.org/display/DDW17/D">https://ddwiki.reso.org/display/DDW17/D</a>
MemberType	Licensed Assistant	The member is an assistant. The status of the assistant being licensed is not known or possibly not required.	<a href="https://ddwiki.reso.org/display/DDW17/Lj">https://ddwiki.reso.org/display/DDW17/Lj</a>
MemberType	MLS Only Appraiser	The member is an appraiser and not a member of the National Association of REALTORS®, receiving MLS services only.	<a href="https://ddwiki.reso.org/display/DDW17/M">https://ddwiki.reso.org/display/DDW17/M</a>
MemberType	MLS Only Broker	The member is a broker and not a member of the National Association of REALTORS®, receiving MLS services only.	<a href="https://ddwiki.reso.org/display/DDW17/M">https://ddwiki.reso.org/display/DDW17/M</a>
MemberType	MLS Only Salesperson	The member is a sales person and not a member of the National Association of REALTORS®, receiving MLS services only.	<a href="https://ddwiki.reso.org/display/DDW17/M">https://ddwiki.reso.org/display/DDW17/M</a>
MemberType	MLS Staff	The individual is a staff member at a Multiple Listing Service.	<a href="https://ddwiki.reso.org/display/DDW17/M">https://ddwiki.reso.org/display/DDW17/M</a>
MemberType	Non Member/Vendor	The individual is not a member or is a vendor.	
MemberType	Office Manager	The member is a license office manager.	<a href="https://ddwiki.reso.org/display/DDW17/O">https://ddwiki.reso.org/display/DDW17/O</a>
MemberType	REALTOR Appraiser	The member is an appraiser and a member of the National Association of REALTORS®.	<a href="https://ddwiki.reso.org/display/DDW17/R">https://ddwiki.reso.org/display/DDW17/R</a>
MemberType	REALTOR Salesperson	The member is a sales person and a member of the National Association of REALTORS®.	<a href="https://ddwiki.reso.org/display/DDW17/R">https://ddwiki.reso.org/display/DDW17/R</a>
MemberType	Unlicensed Assistant	The member is an unlicensed assistant.	<a href="https://ddwiki.reso.org/display/DDW17/U">https://ddwiki.reso.org/display/DDW17/U</a>
TeamMemberType	Administration Assistant	The member of a team who assists with administrative tasks.	<a href="https://ddwiki.reso.org/display/DDW17/A">https://ddwiki.reso.org/display/DDW17/A</a>
TeamMemberType	Buyer Agent	A member of the real estate team.	<a href="https://ddwiki.reso.org/display/DDW17/B">https://ddwiki.reso.org/display/DDW17/B</a>
TeamMemberType	Lead Manager	The member of the team who is the lead manager.	<a href="https://ddwiki.reso.org/display/DDW17/Lj">https://ddwiki.reso.org/display/DDW17/Lj</a>
TeamMemberType	Listing Agent	The member of a team who lists properties.	<a href="https://ddwiki.reso.org/display/DDW17/Lj">https://ddwiki.reso.org/display/DDW17/Lj</a>
TeamMemberType	Marketing Assistant	The member of a team who assists with marketing.	<a href="https://ddwiki.reso.org/display/DDW17/M">https://ddwiki.reso.org/display/DDW17/M</a>





## Mapping Out the Industry



# We Need You

Your problems, your  
participation,  
your solutions

Join us on the second Tuesday of the  
month at 2 pm CST...our next meeting  
is November 10.