CONTENTS

INTRODUTION (5-10min)

ADDITIONAL INFORMATION

BrokerBay® - How to Book a Showing (online video)

BrokerBay® - Help & Support

BrokerBay® - Knowledge Articles (which are available 24/7 for users to access)

Residential vs. Multi-Family Forms (how to properly use each)

Members of ITSO

Zoning Requirements for your MLS® Listings

LSTAR & BrokerBay® - Training Videos

ADVANCED LISTING LOAD & BROKERBAY®

Purpose
Engage Members and Brokerage Staff in hands-on training so they can successfully upload listings to our MLS® System Matrix™.

Duration
3 Hours

Course Goals

- Provide hands-on training and update permissions, so Members and Brokerage Staff can successfully upload, edit and amend listings to our MLS® System Matrix™.

- Review relevant ITSO MLS® Rules and Policies to ensure a high level of data accuracy and compliance.

ADVANCED LISTING LOAD & BROKERBAY®

Resource Links - Should be open and ready for class

- Matrix™

- GeoWarehouse®

- City of London Zones Map
  http://lstar-education.com/images/London-Map/London_Map_Front&Back.pdf

- Thames Valley District School Board
  https://www.tvdsb.ca/en/index.aspx

- City of London
  https://london.ca/

MODULE 1 (15 MIN)

Tips, Tricks and MLS® Rules and Regulations

1. Photographs / Pictures

    - You must have at least one picture to upload your listing.

    - The front of the property is no longer a requirement.

    - Pictures must be at least 1024 x 768 pixels for optimization.

    - You can add up to 50 pictures.

2. Data Sheets

    - If PIN or ARN number is unknown, use a single "0".

    - If taxes or assessments are unknown use a single "0".

    - Use the aerial mode to check pin accuracy on the map.

    - All mandatory criteria boxes have a "none" option that can be checked if nothing in that mandatory box applies.

NOTES

MODULE 1 (15 MIN)

3. MLS® Rules and Regulations

- You cannot have TBD or TBA in the possession date line.

- The primary/front picture cannot have a legible for "sale sign" in it.

- You cannot have "Showings to start.." ; listings must be able for showings immediately after becoming active on the MLS® System.

- You cannot have an agent's phone number or email in the Public Remarks.

- You must have at least one picture and all the mandatory room measurements for the listing to be activated.

- CLAWBACK clauses belong in the Buyer Agency Compensation Remarks, not in the REALTOR® Remarks.

- You may not have "CALL ME FOR…." in the Public Remarks.

- Form 244 must be disclosed on the listing and added under the "Documents" tab.

DEFINITIONS

Disclaimers

Members who post listings on the MLS® are responsible for the accuracy of the information. REBBA 2002, and CREA take precedence over ITSO/LSTAR Rules and Policies. Members MAY NOT add any disclaimers to any remarks section. For example: Buyers to verify zoning (room sizes, taxes, etc.).

DEFINITIONS

Listings – Are NOT accepted if:

- Contain disclaimers of responsibility by the Listing Brokerage for the accuracy or completeness of the information on the MLS® Listing, or any requirement for Members or Co-operating Brokerages or Buyers to verify the information.

- Are not available for showing immediately when loaded to the MLS® System.

- Listings must be uploaded to the MLS® System no later than 11:59 pm on the Business Day following the commencement date "signing" of the MLS® Listing.

- Rural route is not an acceptable address. Only municipal streets are permitted. House number, fire number, lot number or block number (in this order) may be used.

DEFINITIONS

Measurements – need to be correct

- For example, a room size cannot be 0 x 0. All measurements of bedrooms, den, dining room, family room, kitchen, library, living room, loft, media room and office are mandatory.

Taxes and Assessments

- Cannot be "0" unless it is a new build or vacant lot.

Photos

- Images may include surrounding amenities, relating to the property provided they are labeled as such. Photos cannot include advertising or marketing messages (i.e. for "sale sign", logo or business card). You CANNOT use another Member's photos without written permission. You cannot remove photos from a listing after a status change. You can change them out, but not remove them. This is seen to lessen the usefulness of the listing for comparison purposes.

DEFINITIONS

Public Remarks

- Your phone number, email address or website are prohibited in this area. Also "Call today for an appointment", or "Call me…" are prohibited. No disclaimers allowed.

Rider

- Rider on a For Sale Sign that says "Coming Soon", must say "Coming Soon to MLS® or REALTOR.ca" and be loaded within five (5) business days to the MLS® System."

DEFINITIONS

Special Conditions

- If "special conditions" are indicated on the data sheet, they must be identified in the REALTOR®, Showing and/or Offer Remarks. Special conditions consist of statements such as, but not limited to:

    - 24 hr notice for showings

    - Form 244 signed

    - 24 hr irrevocable on all offers

(ADMIN)

- It is mandatory to report any conditional sale as conditional and use the "Continue to Show" if needed.

DEFINITIONS

Form 244

- Must be posted in 'Documents' tab and posted in the Offer Remarks Section.

Clawback Clause

- Belongs in two spots on a listing:
    1. In the legal portion under "Cooperating Brokerage Commission" and;
    2. In the Brokerage section, under Buyer Agency Compensation Remarks, NOT to appear in the REALTOR® Remarks.

Offers (ADMIN)

- Must be reported within 24 hrs of receiving the deposit cheque.

DEFINITIONS

Duplicate Listings (ADMIN)

- Status changes must be reported on both listings, and reference must be made to the "alternate MLS®". One of the sales must be excluded from the stats.

NONMEN ID

- Any NONMEM ID posted to a listing in the MLS® System, will require brokerage name, salesperson name, phone number, email and home board.

MODULE 2 (1 HOUR)

Loading the Information

1. Learn the different ways to start a new listing on the MLS® Systems:

   - Filling in MLS® number

   - Start new

   - Fill from GeoWarehouse®

2. Learn how to choose the correct listing type to correspond with the data sheets.

3. Recognize the different tabs that you move through as you complete the listing load.

4. Understand that you can validate, save as incomplete, or cancel at anytime during the process, and all yellow fields are mandatory.

MODULE 2 (1 HOUR)

5. Learn about the different tabs and pages, most common mistakes, and the key fields in which only certain information can be entered:

   a) GENERAL TAB
      - Sub-type and common interest
      - Property attached or detached

   b) PROPERTY
      - Possession date cannot be TBD or TBA
      - How to fill in LRO, etc.
      - PIN no longer mandatory (but highly recommended)
      - Rural/urban option (location)
      - School district and school names

MODULE 2 (1 HOUR)

c) MAPS
- Blue link to see pin on map
- Choose "place new pin"
- Pin must be moved if already populated or listing will not show on REALTOR.ca
- Link to LSTAR 2015 Map

d) BROKERAGE INFORMATION
- How to change the Agent's name in a listing (for admin, NONMEM or co-listing agent)
- Listing starting and expiry dates now on this tab
- Add pictures, virtual tours, YouTube videos, etc.
- Additional images, HST info, Listing Brokerage location and type
- Offer instructions, Buyer Agency Compensation (now the place for clawback clause details or Schedule "A" indication)

MODULE 2 (1 HOUR)

e) COMMEN ELEMENTS
- Replaces the CONDO tab and can be used for any sub-type but is not mandatory; becomes MANDATORY for Condo

f) EXTERIOR
- Driveway and garage spaces need to be a number; not "1+", or "enough", or "plenty"
- Parking features (garage and parking indications)
- Drop down list to select style (you can only choose one)
- Construction material and roofing under one category
- In services box, first two apply only to lots or new construction
- Split levels now indicated by "multi-levels"
- Pool option now available.

MODULE 2 (1 HOUR)

g) INTERIOR
- Laundry features
- Above grade square footage is now required
- Basement size and finish are combined

h) ROOMS / DETAILS / COMMENTS
- There are two boxes on the data sheets, containing the ONLY choices we have for room types.
  Features to choose from room descriptions are now available.
- What is NOT allowed in either of the remarks boxes (refer to MLS® Rules and Policies)

i) AUXILLIARY BUILDINGS
- Not mandatory but can be used for any sub-type

MODULE 2 (1 HOUR)

g) GREEN
- Not mandatory but can be used for any sub-type

6. Save your work as "incomplete" and continue adding to the listing by using the "manage photos "and/or "manage documents" buttons

7. Learn how to create a " two-page" data sheet for signature (unsuppressed)

MODULE 2 (1 HOUR)

8. Learn how to:

   ▪ Add, rotate, move and delete photos and add descriptions

   ▪ Add descriptions and how to move them around or delete them

   ▪ Size pictures appropriately

   ▪ Review MLS® Rules and Policies concerning pictures

   ▪ How to upload and name any documents that go with the listing

MODULE 3 (30 MIN)

The Power of Changing Status

Administrators and personal assistants are granted the permission to change the status and price of listings on the MLS® System by their brokerages.

Rules for using the permission:

a) Always make note of changes made and date.

b) Always make sure you have the complete paperwork before making a change.

c) You do not have to send anything to the Association unless you want them to do the change for you (reporting forms).

MODULE 3 (30 MIN)

d)   Input audit keeps track automatically of all changes.

e)   If you have gone in and not changed anything, make sure that you "cancel input".

f)   Inform that permissions include changing from:

- Changing from Active to Conditional

- Changing from Conditional to Sold (see notes below)

- Suspending

- Changing the price

- Extending the expiry date

MODULE 3 (30 MIN)

Notes

- Permissions do not include changing from sold back to active; if this happens, you must have the board do this.

- When a listing is conditional on the sale of a home, you cannot keep it active. You need to report it conditionally sold and indicate if it is still available for showings or not.

- When changing to conditional, you add the condition date farthest out.

MODULE 4 (1 HOUR)

Introduction to BrokerBay®

Learning Outcomes

1. How to set-up profile

2. How to complete the Showing Configuration

3. How to message Agents (regarding offers)

4. How to use Offer Registration (and how to set up)

5. How to send a Message (text)

6. How to manually add a showing (why its important to do it)

MODULE 4 (1 HOUR)
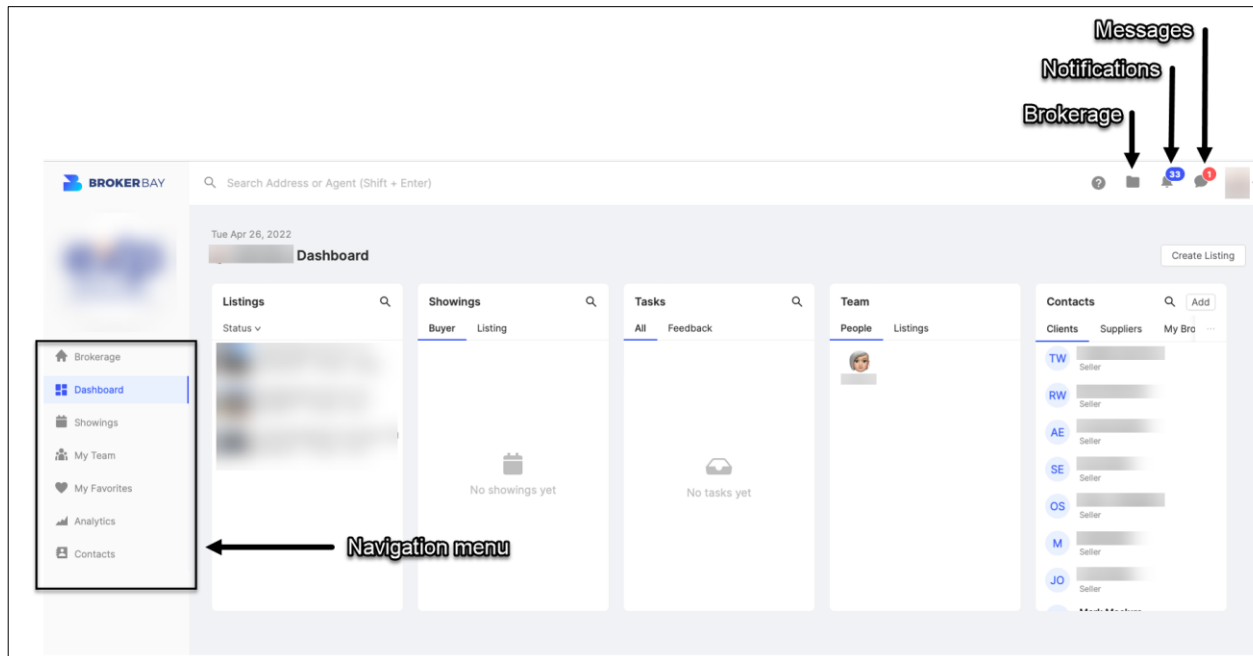
The Dashboard

MODULE 4 (1 HOUR)

The Dashboard of a Listing

Configure your showings (formerly Listing Worksheet)
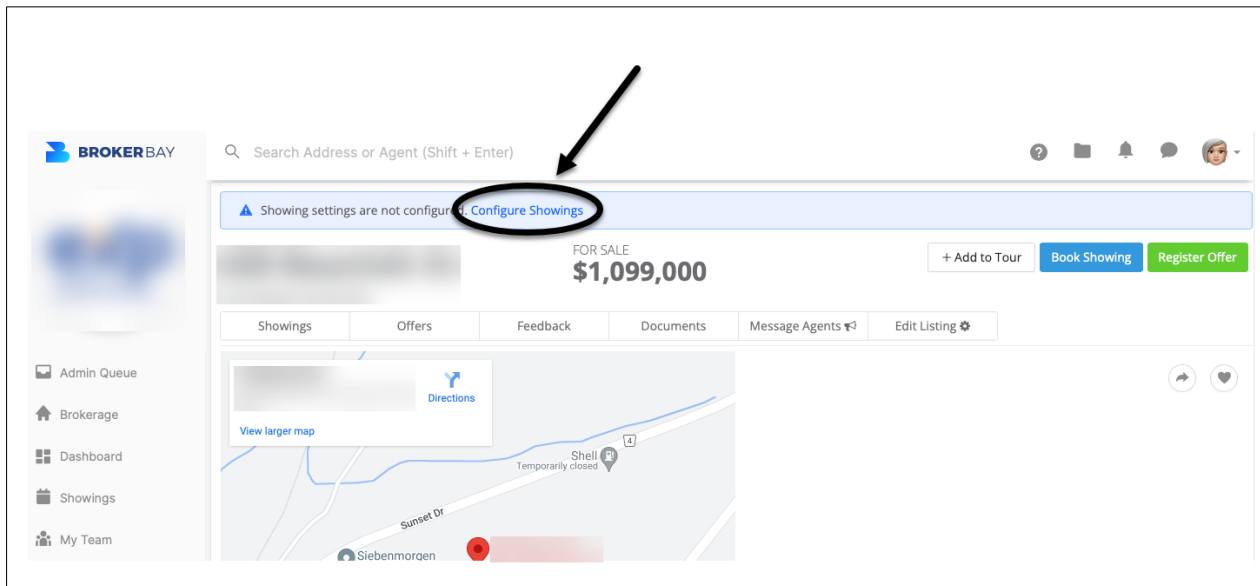
MODULE 4 (1 HOUR)

Showing Configurations – Showing Settings

- Turn off showings if needed

- example: offer received but no deposit cheque

- Mandatory fields are in highlighted in yellow

MODULE 4 (1 HOUR)

Adding Seller to confirm their own showings

- Add contacts to confirm their own showings, and set up Agent preferences for showing requests.

MODULE 4 (1 HOUR)

Adding Showing Restrictions

- Simply click and drag to select all the time slots that apply.

- You also have the option to select just one entire day for restrictions.

MODULE 4 (1 HOUR)

Messaging Agents

- Click on the listing

- Click on the Tab – Message Agent
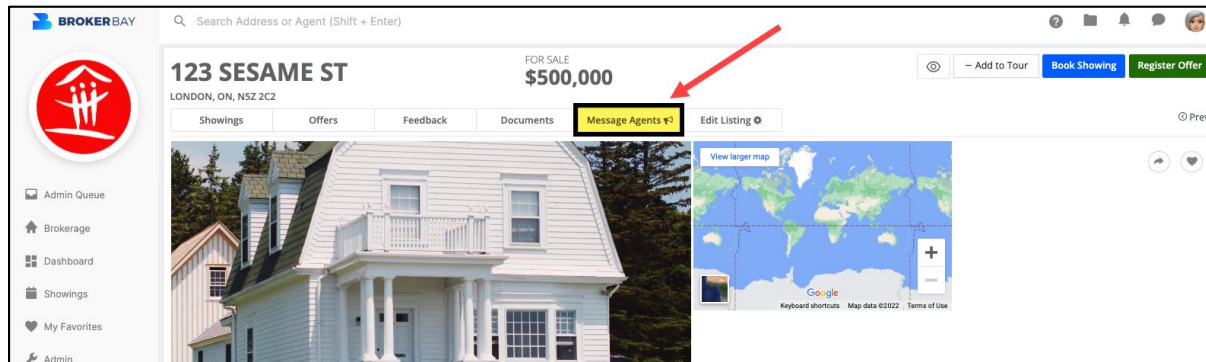
MODULE 4 (1 HOUR)

- The Message Showing Agents window will open
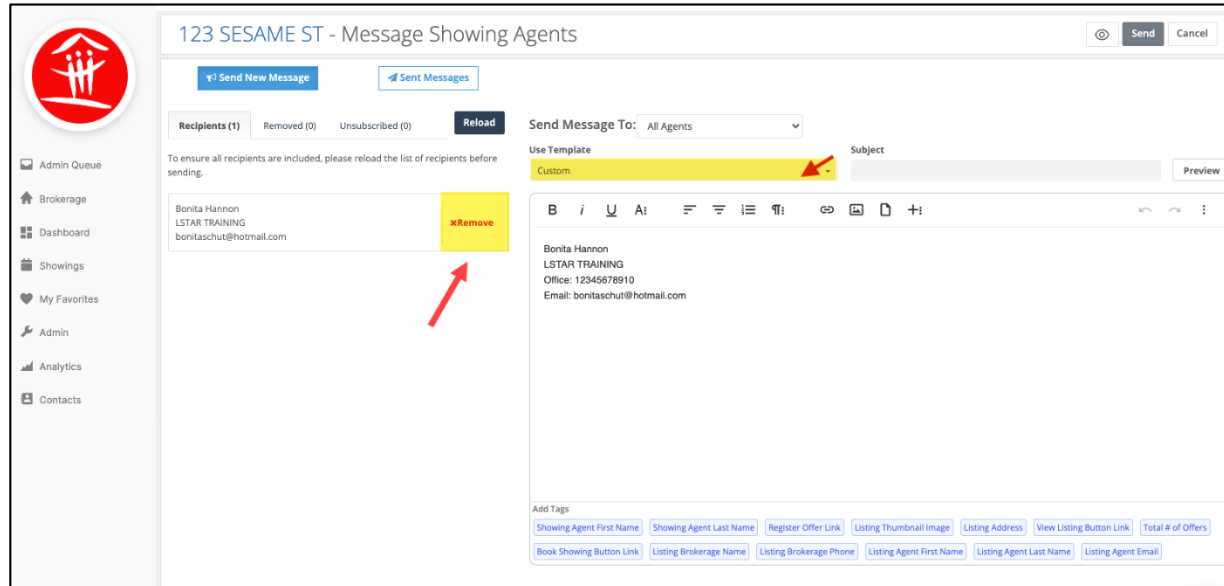
MODULE 4 (1 HOUR)
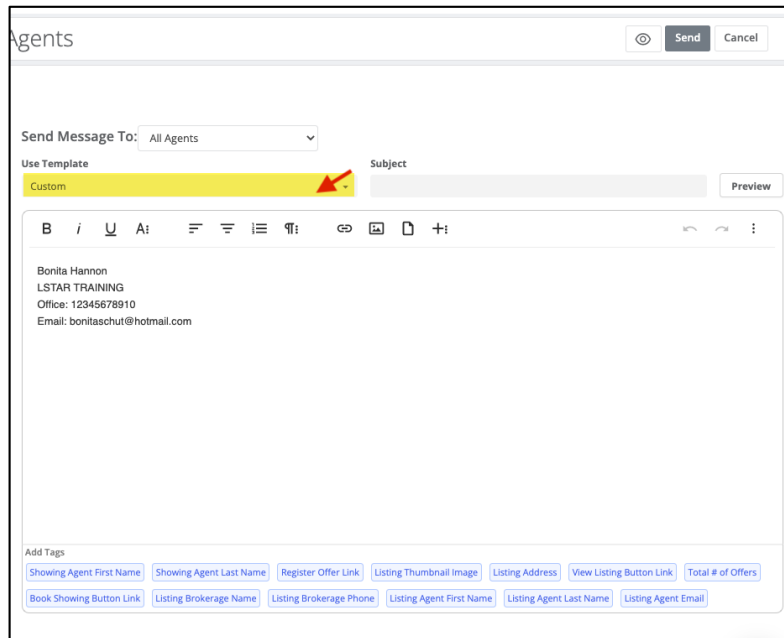
- Remove any Agents that you do not want receiving this message

- You cannot add Agent's emails, which makes it even more important that you manually add showing for those that cannot/will not
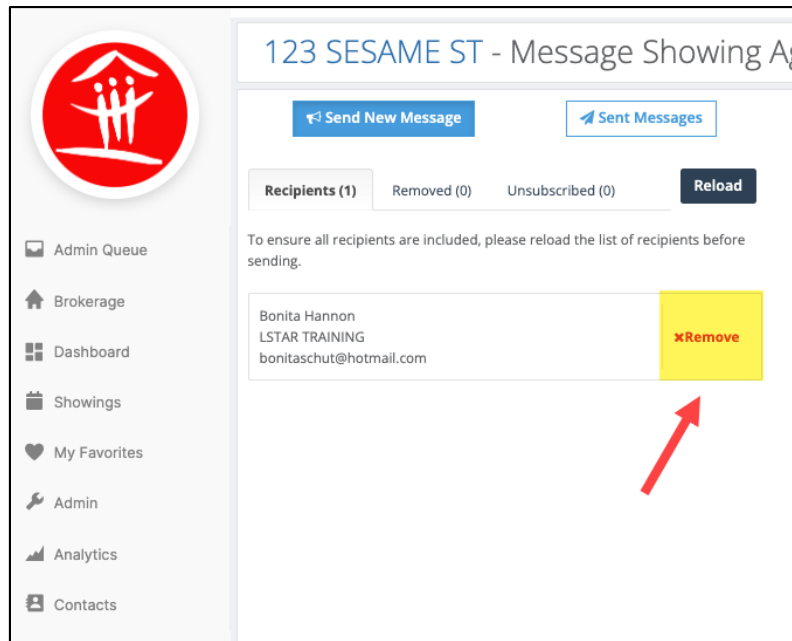
MODULE 4 (1 HOUR)

- Choose which template you want to use.

- You can create custom templates under your profile.

MODULE 4 (1 HOUR)

Offer Registration Settings

- Click on offer settings prior to receiving offers.
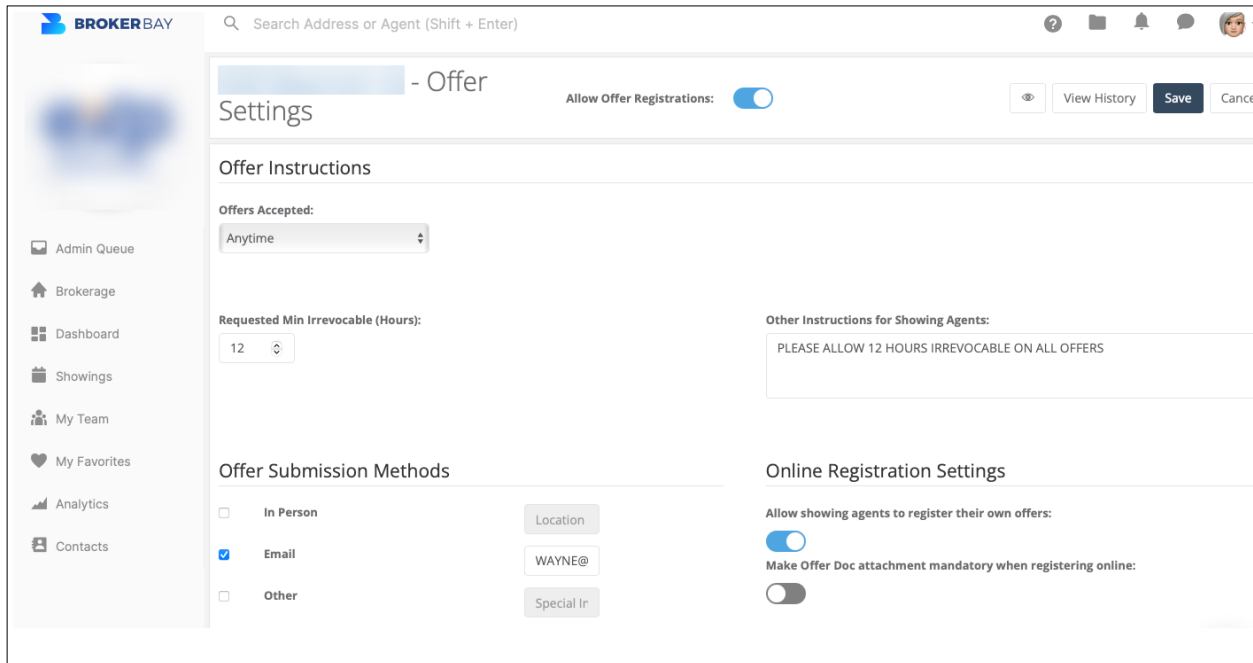
Offer Configurations

- You can also view the offer notification template when in this section. Cooperating Brokers receiving the messages can opt-out of these notifications themselves. No more scrambling to delete emails of Agents wanting to no longer receive notifications.

MODULE 4 (1 HOUR)

Set your Offer Configurations

MODULE 4 (1 HOUR)

Messaging Agents (text)

- Sending a message to an Agent(s) outside of your brokerage, use the search bar to find their name.
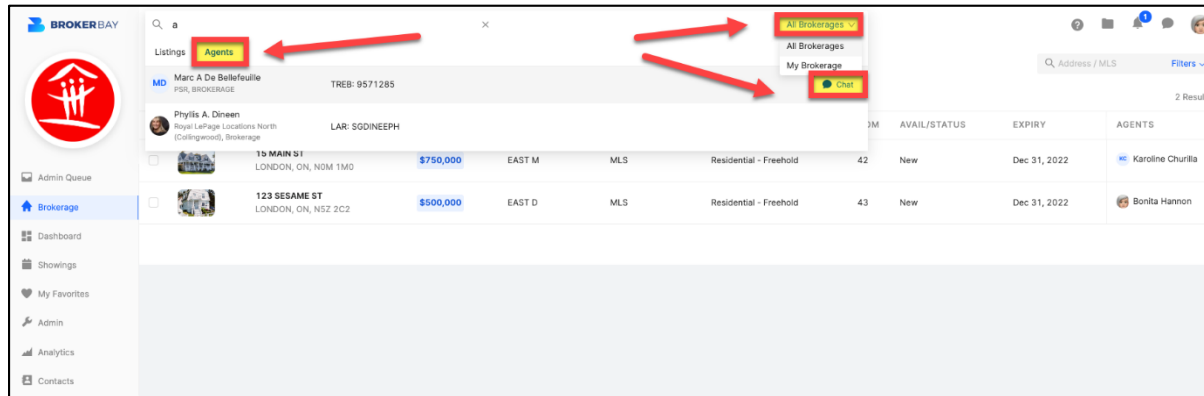
MODULE 4 (1 HOUR)

- You can message multiple users within your brokerage

- Click from your list to select or add through search
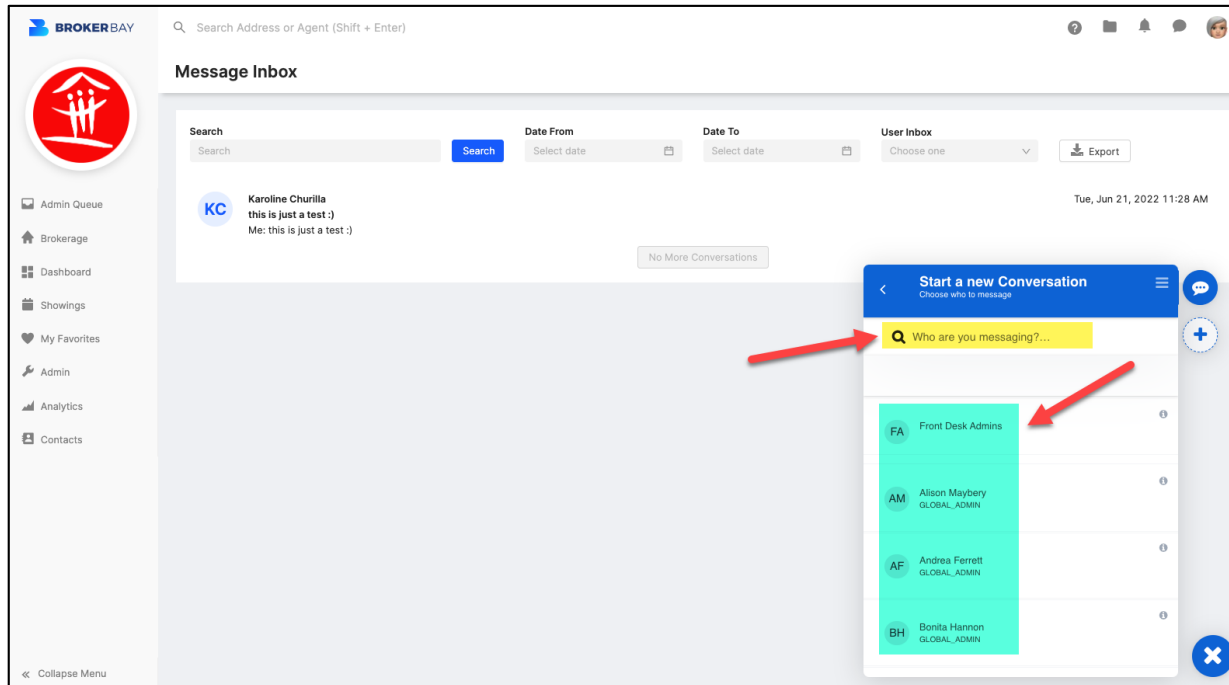
MODULE 4 (1 HOUR)

Manually Add a Showing

- Choose the listing you want to show

- Select – Book Showing
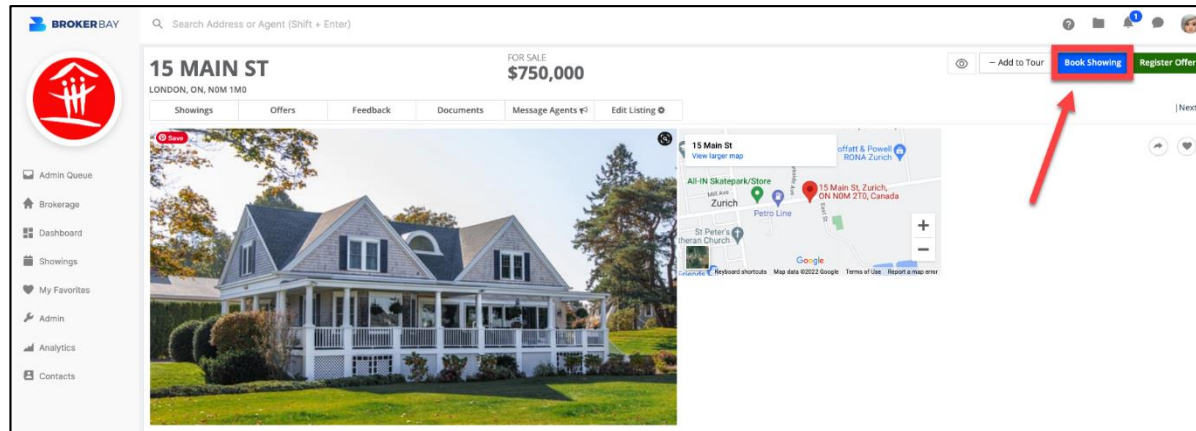
MODULE 4 (1 HOUR)

Manually Add a Showing – STEP 1

- Search for the Agent's name

- All Agents in Ontario will be on the list

MODULE 4 (1 HOUR)

Manually Add a Showing – STEP 2

- Select a date

- Then either Book Showing to send to your Sellers to confirm; or Book & Confirm if you have already confirmed with the Sellers

MODULE 4 (1 HOUR)

Manually Add a Showing – STEP 3

- Select time and add details

MODULE 4 (1 HOUR)

Introduction to BrokerBay® Mobile App

Learning Outcomes

1. How to message an agent (text-type) for a listing

2. How to add Showing Configurations and Offer Settings

3. How to Register an Offer or Book a Showing

4. How to Message Agents to send out a notification about offers

5. On the dashboard, learn to use the tools at the bottom to send a text-type message to an agent (not tied to a listing), search for a listing, and check your showings
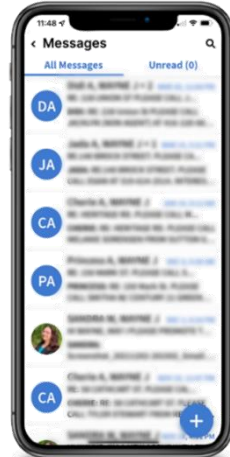
MODULE 4 (1 HOUR)

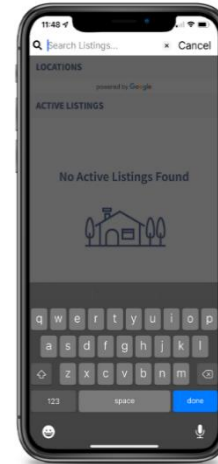## Introduction to BrokerBay® Mobile App - Overview
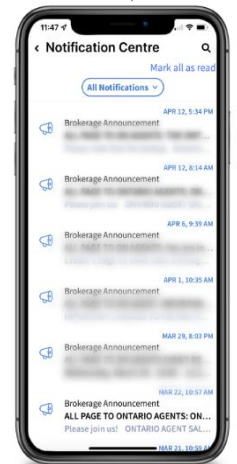
The Dashboard
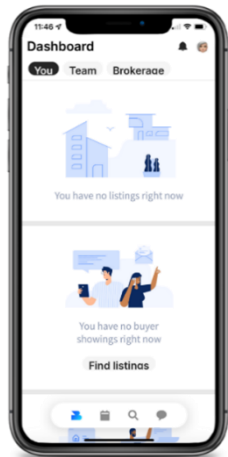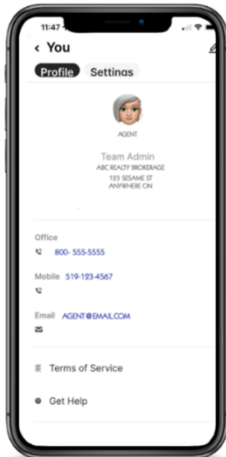
Agent Message Centre

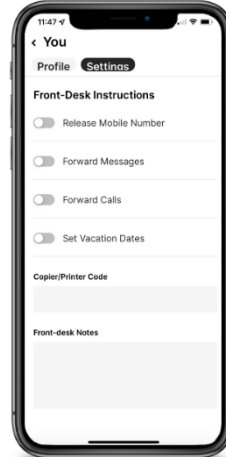Search for listings or register an offer
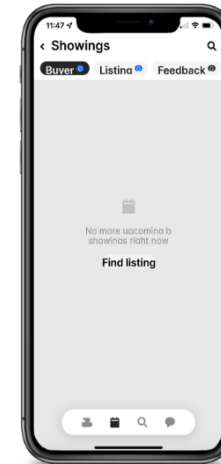
Board or Brokerage notifications

Agent Profile

Settings and Front Desk instructions

See your scheduled showings or those booked on your listings

MODULE 4 (1 HOUR)

How to Book a Showing in Matrix™

- Select the Showing Icon on Matrix™

- Accept the COVID Form – No Showing without accepting.

  No need to use a Brokerage Form separately.

MODULE 4 (1 HOUR)

How to Book a Showing in Matrix™
STEP 1 – Your Profile

- Choose how you want to be notified

MODULE 4 (1 HOUR)

How to Book a Showing in Matrix™

STEP 2

- Choose a date
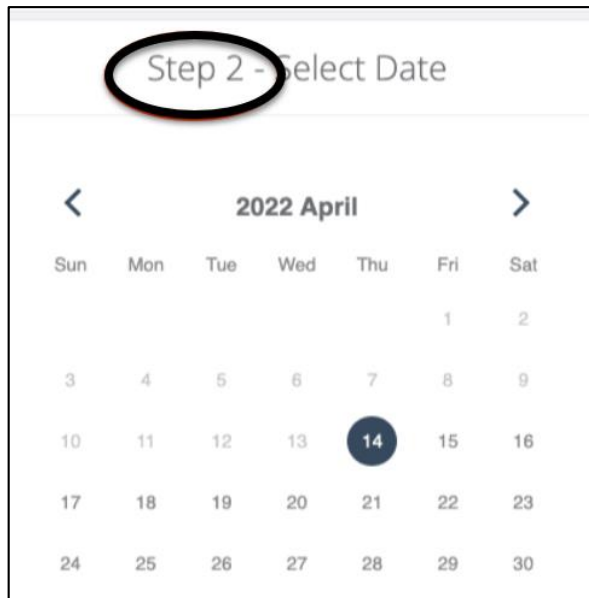
MODULE 4 (1 HOUR)

How to Book a Showing in Matrix™

STEP 3

- Choose a time and then Book Showing

ADDITIONAL INFORMATION

BROKERBAY® - VIDEO (how to book a showing)

View how to schedule a showing with BrokerBay® select link below

[Booking A Showing in BrokerBay - YouTube](#)

Booking A Showing in BrokerBay
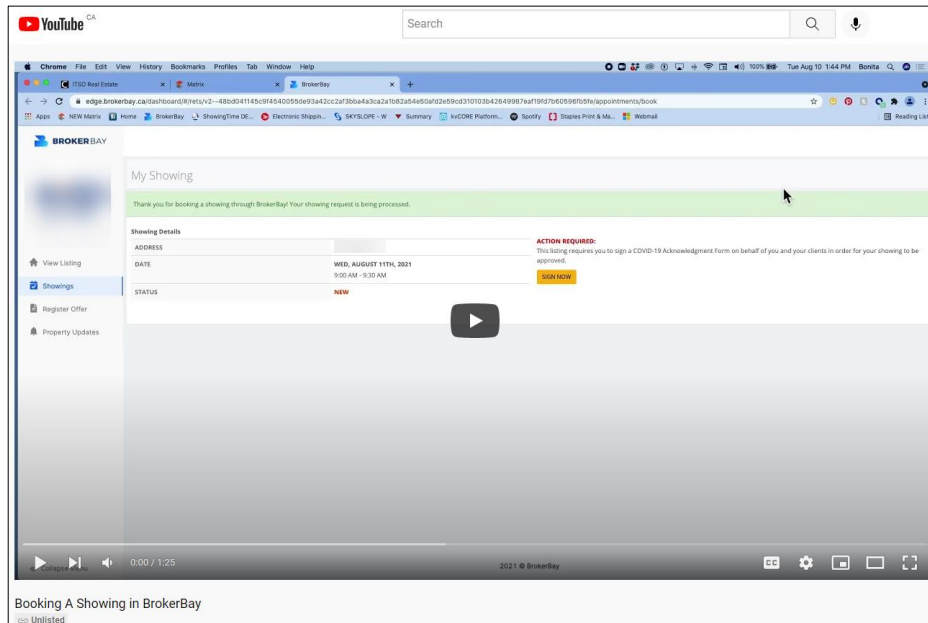
ADDITIONAL INFORMATION

BROKERBAY® - Help & Support

Go to: https://brokerbay.zendesk.com/hc/en-us

Locate the [? Help] button located at the bottom right of the screen
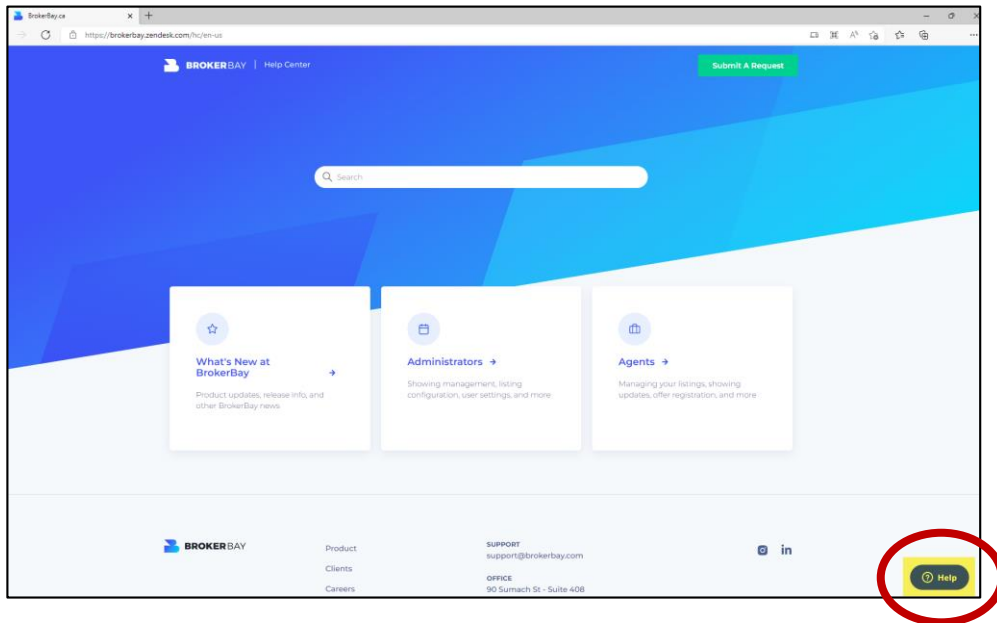
ADDITIONAL INFORMATION

Residential vs. Multi-Family Forms – How to Properly Use Each

<u>Residential Form</u>

USE IT FOR
- Single family or townhouse freehold Single family or townhouse condo
- Single family lease (including townhouses and apartments)
- Apartment condo
- Modular home or Mobile home
- Cottages or waterfront properties
- Any home that has a common element fee but is not a condo
- Deeded parking

DO NOT USE IT FOR
- Any sort of multiple family home

<u>Multi-Family Form</u>

USE IT FOR
- Duplexes
- Triplexes
- Homes with 4+ units

DO NOT USE IT FOR
- Single family homes of any type
- Condos of any type

IMPORTANT THINGS TO NOTE

If you list your multi-family home using a single family residential form, it will get loaded as residential listing, and buyers looking for a multi-family home may NOT find your listing.

You may list your multi-family as both multi- family and single family residential, but, primarily, it must be listed as multi-family.

All of the new ITSO forms can be found in WEBForms® under the LSTAR folder, as well as the ITSO folder.

ADDITIONAL INFORMATION

MEMBERS OF ITSO

- Barrie and District Association of REALTORS®
- Brantford Regional Real Estate Association
- Guelph and District Association of REALTORS®
- Huron Perth Association of REALTORS®
- Kawartha Lakes Real Estate Association
- Kingston and Area Real Estate Association
- London and St. Thomas Association of REALTORS®
- Mississauga Real Estate Board
- Niagara Association of REALTORS®
- North Bay Real Estate Board
- Peterborough and the Kawartha Association of REALTORS®
- Quinte and District Association of REALTORS®
- REALTORS® Association of Grey Bruce Owen Sound
- Simcoe and District Real Estate Board
- The Lakelands Association of REALTORS®
- The Oakville, Milton and District Real Estate Board

https://www.itsosystems.ca/members-of-itso
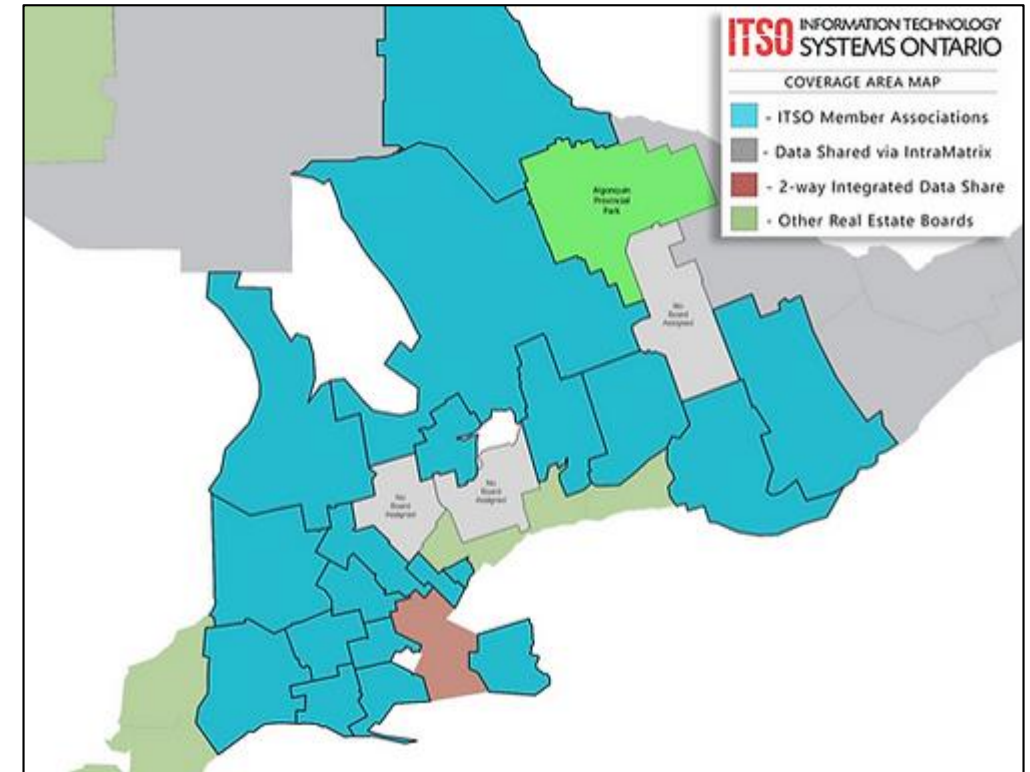
- Waterloo Region of Association of REALTORS®
- Woodstock Ingersoll Tillsonburg & Area Association of REALTORS®

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

Zoning Requirements for your MLS® Listings and Resources

As a friendly reminder, LSTAR is now required to make sure that all the additional listing content on its MLS® system respects the rules set by ITSO regarding the accuracy of information. Zoning is part of the additional listing content that LSTAR must screen for accuracy. A zone of 'residential' or 'commercial' without any additional information is not permitted. Choosing 'Agricultural' for zoning is acceptable as long as that is the actual zoning code set by the municipality/township for the area where the listing is located.

The Listing Brokerage is responsible and accountable for the accuracy of the information submitted to the Association for inclusion in its MLS® System database.

Below are some resources meant to help you provide accurate zoning information for your listings:

City of London – Interactive Zoning Map
https://london.maps.arcgis.com/apps/webappviewer/index.html?id=20327d3bcfb34bb488a7c3f74c05d2d3

For any additional inquiries, please contact the City's Zoning Department at:
zoning@london.ca
519-930-3510

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

Middlesex County

There is an interactive map of the County showing the zoning for all the Municipalities located in Middlesex County. The link below takes you to a website where you can select the "Public Middlesex Map". After making that selection, you will need to turn on zoning for Municipalities and search for properties.

https://www.middlesex.ca/departments/mapping#interactive_mapping

If still unsure about the zoning of a specific property, you can contact the Middlesex County's Administrative Office at 519-434-7321 or complete a ticket on the "Contact Us" page to get in touch with one of the municipality's Planners.

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

City of St. Thomas

Currently, the City of St. Thomas does not have an interactive zoning map
but is in the process of creating one.

*If you require zoning information for a property in this area, you will need to contact the City
of St. Thomas* at 519-631-1680.

Elgin County

At this time, Elgin County does not have a mapping system that shows zoning for each municipality within the County. Anyone who needs to obtain zoning information for a property in this area must contact the municipality the listing belongs to. Please see below contact information for all the municipalities that fall under the jurisdiction of Elgin County.

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

Municipality of Bayham

https://www.bayham.on.ca/pages/municipality-of-bayham-zoningby-law?_pos=1&_sid=8e0fbce07&ss=r

Contact: Margaret Underhill
munderhill@bayham.on.ca
519-866-5521

Township of Malahide

https://www.malahide.ca/en/business-anddevelopment/resources/Planning-/Zoning-By-law-Consolidated-/2021---18-22/2021-02-01---Consolidated-Zoning-By-law-18-22.Pdf

Contact: Christine Strupat
cstrupat@malahide.ca
519-773-5344

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

City of Alymer

https://aylmer.ca/town-hall/planning-building/zoning/

Contact: Christie Kent
ckent@town.aylmer.on.ca
519-773-3164 ext. 4915

Municipality of Central Elgin

Central Elgin has three zoning by-laws; any zoning inquiries should be directed to the staff working for the municipality.

Contact: Kevin McClure
kmcclure@ssthomas.ca
519-631-1680 ext. 4164

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

Township of Southwold

https://www.southwold.ca/en/business-anddevelopment/resources/Documents/Southwold-zoning-by-law-2020-consolidation.pdf

Contact: Bryan Pearce
planning@southwold.ca
519-769-2010

Municipality of Dutton/Dunwich

https://www.duttondunwich.on.ca/sites/default/files/ZONING%20BY-LAW%202004-04.pdf

Contact: Tracey Pillon-Abbs
planning@duttondunwich.on.ca
519-762-2204

ADDITIONAL INFORMATION

Zoning Requirements MLS® Listings

Municipality of West Elgin

https://www.westelgin.net/en/business-and-development/zoningby-law.aspx

Contact: Bryan Pearce
planning@westelgin.ca
519-785-0560

ADDITIONAL INFORMATION

TRAINING – Video Links

LSTAR

How to Setting up your Profile/Account in BrokerBay®

Showing Configuration in BrokerBay®

Setting up a Showing in BrokerBay®

Offer Registration in BrokerBay® (how to use and to set up)

Navigating Through the BrokerBay ® Mobile app

Adding A Team in BrokerBay®

ADDITIONAL INFORMATION

TRAINING – Video Links

BROKERBAY®

Admin training – [video link](#)

Agent training – [video link](#)

BrokerBay® - [Mobile App Guide](#)

BrokerBay® - [How to Set Up Teams](#)

How to complete the Showing Configuration
[How do I configure offer instructions for my listing? – BrokerBay.ca (zendesk.com)](#)

How to message Agents (regarding offers)
[How Do I Message All Agents Who Have Shown The Property? – BrokerBay.ca (zendesk.com)](#)

How to send a Message (text)
[How Do I Send A Message? – BrokerBay.ca (zendesk.com)](#)

How to manually add a showing (why its important to do it)
[How To Add Showing Instructions – BrokerBay.ca (zendesk.com)](#)