# MAX/Tech Platform Expansion FAQ

(Canada Version - Last Updated 9/4/24)

**What is the history with RE/MAX and Inside Real Estate?**

RE/MAX and Inside Real Estate – the providers of kvCORE – began a partnership in 2022. The two companies worked tirelessly to bring MAX/Tech powered by kvCORE to Canada and U.S. affiliates.

The launch was a huge success, highlighting the alignment of the two company's missions.

Inside Real Estate remains on the cutting-edge of real estate technology, driven by innovation in acquiring new companies and relentlessly improving current product solutions.

That drive for improvement, persistent focus on growth and obsession with customers mirrored the foundation RE/MAX has built as a real estate leader for the past five decades.

In working together, the two companies continue to find ways to innovate and bring top solutions in real estate to RE/MAX brokers, owners, agents and teams.

**What is happening with MAX/Tech powered by kvCORE?**

Inside Real Estate began a rebrand of kvCORE earlier this year. In June, kvCORE was rebranded as BoldTrail. The BoldTrail rebrand began in late June and was rolled out to non MAX/Tech powered by kvCORE accounts.

**Will MAX/Tech powered by kvCORE get rebranded?**
Yes. In Q4 2024, MAX/Tech will shift over to the new and enhanced BoldTrail. The overarching solution will be called MAX/Tech powered by BoldTrail.

**What does the rebrand mean?**
With the rebrand from MAX/Tech powered by kvCORE to MAX/Tech powered by BoldTrail, users will see many enhancements. These enhancements include:
- Improved navigation and an updated user interface to increase usability and boost adoption
- Further AI integrations and automation capabilities to deliver more actionable insights and simplify workflows
- A new omnisearch feature to quickly find key information + have better navigation inside the platform
- Centralized transaction workflows across the complete homeownership experience
- Vital data that delivers powerful, actionable insight into an agent's business to boost performance

Additionally, the names of some of the features within MAX/Tech powered by BoldTrail will also change.
- CORE Present will be Present
- CORE Listing Machine and Design Center will now be separated to be:
    - ListingMachine
    - DesignCenter
- CORE Team will be Team
- CORE Social will be Social

**What agent-facing enhancements have already launched for MAX/Tech powered by kvCORE?**
When Inside Real Estate launched the rebrand to its non-RE/MAX customers, they also included the following enhancements on MAX/Tech powered by kvCORE accounts:

- [New Page Editor](): Fully customize your web pages with images, buttons, GIFs and more.
- [Comparable Adjustments](): Add price adjustments to comparable properties, ensuring the most accurate and compelling presentations possible.
- [Win the Representation](): New in Present, this presentation allows you show why prospective clients should work with you. This is in addition to the RE/MAX branded listing presentation also available.

**What other product solutions are coming?**
RE/MAX leaders announced the rebranding to BoldTrail as well as other new solutions that will make MAX/Tech powered by BoldTrail one of the most modern and powerful technology platforms in the industry.

The solutions are:
- BoldTrail BackOffice, the next generation of BrokerMint
- Folio, an AI-based solution that automates email organization by clients and transactions to enhance agent productivity

**Who will these solutions be available for?**
BoldTrail BackOffice will initially begin rollout in Q4 2024 for just company-owned regions in the U.S. The product is scheduled to roll out to Canada company-owned regions in 2026.

Folio will roll out prior to BoldTrail BackOffice, as early as Q4 of 2024 for the U.S. and Canada.

As of right now, these products will be available only in RE/MAX company-owned regions. Broker/Owners in independent regions should talk to their regional contacts about when these may launch in those areas.

**Why is BoldTrail BackOffice not yet available to roll out in Canada?**
Inside Real Estate is actively working to enhance the solution to support sales tax, localization (e.g. state vs. province, trade vs. transaction), trade record reports and other commission statements, T4A reporting and validating its EFT and credit card providers.

**Why adopt the new product solutions?**
With the launch of MAX/Tech powered by BoldTrail and the additional BoldTrail solutions, brokers, agents and teams can receive the benefit of utilizing one end-to-end platform. Agents and teams can do everything they need to efficiently run and manage their businesses, which automatically connects to the specific needs brokerages have running, managing, and growing their businesses. The result is one of the most powerful, integrated and modern technology platforms in the entire industry. They will be able to do everything from contact to contract to close all in one platform.

When combined, users won't have to go to multiple places with multiple logins. With the MAX/Tech powered by BoldTrail platform, the goal is to help brokerages and agents be more productive, reduce overhead, win more listings and stay in front of clients for life.

**Is there an additional investment for the new MAX/Tech powered by BoldTrail solutions?**
RE/MAX is providing access to the standard BoldTrail platform, which includes the solutions outlined below at no additional investment and as part of our existing fee structure.  As always, there can be additional investment associated with custom integrations, usage of additional product features (i.e. Core Video or Core Video Premium) and tailored services.

**Why should RE/MAX Broker/Owners, agents and teams be excited about the new solutions?**
When connected to MAX/Tech powered by BoldTrail, the platform provides an end-to-end offering that unites the front of the house with the back of the house.

**What happens with current Inside Real Estate back office customers?**
Existing back office customers will have an opportunity to transition from their current solutions to the RE/MAX enterprise offering.

They will continue with their existing subscription agreement and billing until they are officially transitioned into the new RE/MAX enterprise platform.

Current back office customers include those subscribing to: BoldTrail BackOffice (formerly known as Brokermint), BrokerSumo (formerly known as CORE Back Office), and Folio.

Additional details will be coming soon about the transition process and specific launch timing for current customers.

# Here's a closer look at the BoldTrail BackOffice solutions

**BoldTrail BackOffice** provides a single, streamlined solution to manage agent onboarding, transaction management, forms and e-signature, compliance, commissions and disbursements, agent billing, along with reporting and accounting. It allows brokerages to run efficiently and profitably.

**What if someone is using another back office provider?**
Inside Real Estate supports various migration paths, including but not limited to:
- Historical export and import of documents and transactions for compliance
- Roster imports/sync for onboarding agents/staff
- Opening balances for commissions, awards and ledgers
- Read-only mode (or limited seat counts) with your current provider

Look for more information to come.

**What happens if someone is currently under contract with a back office provider?**
There are various options to pursue with a current provider. This includes, but is not limited to, aligning renewal dates with a transition date to BoldTrail BackOffice, limiting seat counts and other options. This partnership provides additional optionality in discussions with a current provider. Look for more tips and guidance in the future.

**Folio** is an AI-powered email productivity tool that turns your unstructured firehose of emails into a powerful and secure business organizer. Folio layers on top of Gmail or Office365 inboxes, automatically detecting real estate transactions, creating a beautiful timeline for consumers, and seamlessly pushes key transaction details directly into BoldTrail BackOffice for compliance. Folio achieves greater agent productivity and delivers an elevated consumer experience, while gaining faster access to transaction details for brokerage review and compliance.

**What are the next steps?**
Broker/Owners and agents should begin adopting and using MAX/Tech powered by kvCORE. The more agents begin using their product solutions, the more powerful the overall end-to-end platform becomes. Be on the lookout for further communications on the roll out schedule, solution details, and more!