

BALDWIN
REALTORS®

×



Perchwell MLS Platform

Product & Implementation Overview

Presented by:
Baldwin REALTORS® and Perchwell®

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We're excited to bring you Perchwell

Dear Baldwin REALTORS® Members,

I am always thinking about how to best support you and help you grow your business. The technology you use every day impacts your business and makes an impression on your clients.

We spent the past year evaluating partners to best serve those needs, and Perchwell stood out because they build their platform directly with the organizations and agents who use it. I am impressed with how intuitive the platform is and am excited for you to jump in and see it for yourself.

Sincerely,



Wendy Alley
MLS Executive Officer,
Baldwin REALTORS®

Dear Baldwin REALTORS® Members,

I am grateful for the opportunity to bring Perchwell to Baldwin County. Our goal is to give you modern tools that help you serve your clients and grow your business.

We take an agent-first approach to building technology. Your feedback drives our roadmap and shapes how we design every part of the platform. I encourage you to share your feedback with us as we build the platform of the future together.

I and everyone at Perchwell looks forward to working with you and for you in Alabama.

Sincerely,



Brendan Fairbanks
Founder & CEO,
Perchwell

Table of Contents

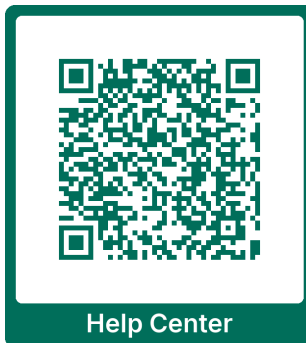
We're excited to bring you Perchwell.....	2
Table of Contents.....	3
Resources.....	3
Implementation.....	4
Perchwell Story.....	6
Product Highlights.....	7
MLS Ecosystem.....	13
What's Changing in Your Day-to-Day.....	16
Support.....	22

Resources



Conversion Center

Your one-stop-shop for timeline updates, training sign-up, and transition resources.



Perchwell Help Center

Get step-by-step guides, short videos, and support for navigating the new platform.



Frequently Asked Questions

Find quick answers to common questions about the transition to Perchwell.

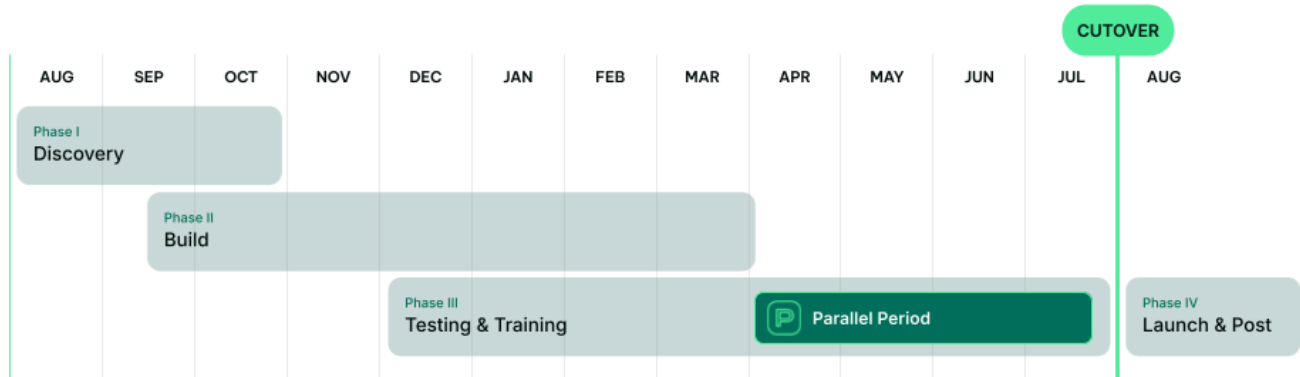


Training Groups

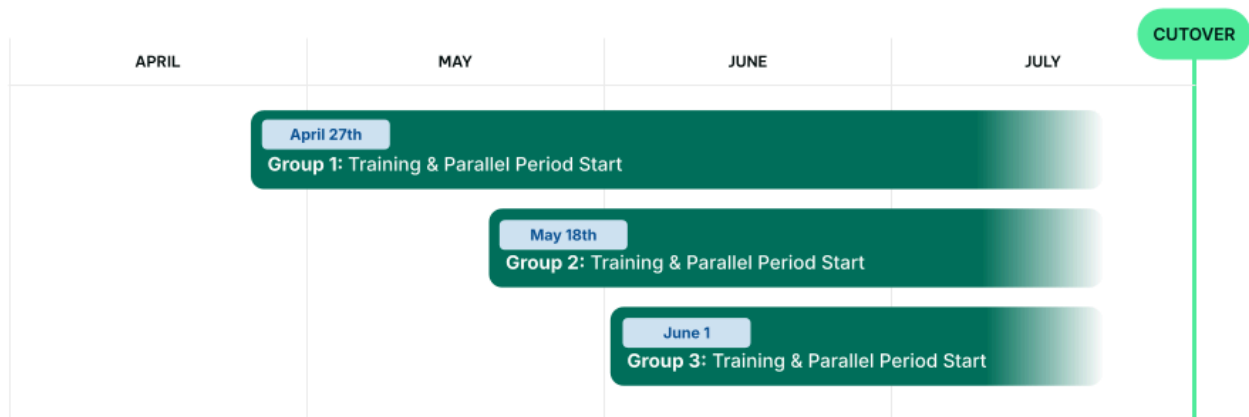
Your training group determines when you will begin your training and parallel period.

Implementation

Baldwin REALTORS® leadership has spent the last year working alongside the Perchwell team to evaluate, configure, and tailor the platform to our market. The rollout plan is structured to provide time and opportunities to learn the platform before a complete transition in August.



What to expect during the Parallel Period



1. **Complete a short online certification** to gain access to Perchwell during the parallel period and learn how to use the new platform.
2. **Attend on-site sessions** at the Baldwin REALTORS® office during your first week, with virtual options available as well.
3. **Continue with virtual training sessions** over the following weeks covering search, dashboards, client collaboration, and more, including dedicated admin training.
4. **Use Perchwell for daily workflows** while Paragon remains your system of record for listing entry until cutover.
5. **Get help anytime** through the Baldwin REALTORS® team, in-app customer support, and the self-serve help center. See the support section of this document for more information.

Your data in Perchwell

To ensure you can begin using the platform effectively on your access date, Perchwell migrates your key data from Paragon. This includes resources such as your Contacts, Saved Searches, and Partial (Draft) listings. The accuracy of the data you see in Perchwell depends on the accuracy of the data Paragon is able to provide. The table below outlines the data resources that will be available to you in Perchwell, when they will be migrated, and the completeness of the data, taking into account any structural/data differences between Paragon and Perchwell.

Data Resource	Migration Date	Migration Type	Data Completeness	Cutoff Period
Listings	Start of Parallel	Live-Synced	100%	N/A (all)
Contacts	Week Before Cohort Start Date	One-Time Transfer	100%	N/A (all)
Saved Searches	Week Before Cohort Start Date	One-Time Transfer	Mixed; see below.	N/A (all)
Saved Search & Contact Linkages	Week Before Cohort Start Date	One-Time Transfer	High	N/A (all)
History of Shared Listings to Contacts	Not Transferred	Not Transferred	0%	N/A (none)
Contact Listing Notes & Reactions	Not Transferred	Not Transferred	0%	N/A (none)
Partials	7/20/2026	One-Time Transfer	TBD	1/1/2023

Listings & Partials

From the start of the parallel period, **all Baldwin MLS listings appearing in Paragon will be ingested in Perchwell and kept up-to-date within an approximately 15-minute window.** Changes made in add/edit in Paragon (i.e. "Listing Maintenance") will automatically propagate to Perchwell.

Additionally, when Perchwell add/edit "Training Mode" is activated on July 20th, 2026, all partials in Paragon (known as "drafts" in Perchwell) will be migrated to Perchwell in a one-time data sync.

From this date through our cutover on August 3rd, 2026, all partials should be maintained independently in Perchwell as drafts; updates to a partial in Paragon from that point on will *not* automatically propagate to Perchwell.

Contacts

All of your contacts in Paragon will be migrated into Perchwell the week prior to each cohort's access date. After that date, contacts will not automatically update in Perchwell if changes are made in Paragon. This data migration includes all fields/inputs available in Paragon today, and these fields will appear on contact detail pages in Perchwell.

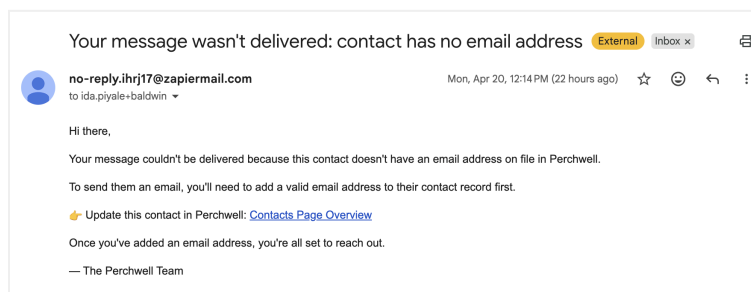
There are two important points to note in relation to contacts:

1. Approximately 20% of contacts across Baldwin MLS in Paragon today do not have email addresses. Unlike in Paragon, email addresses are required when creating contacts in Perchwell, as many client collaboration features involve emailing. This requirement ensures data integrity and smooth in-platform client collaboration.
2. In Perchwell, contact email addresses are not editable once a contact is invited to Perchwell.

Contacts missing email addresses in Paragon will nonetheless be imported into Perchwell. These contacts will appear on the "Contacts" page of Perchwell with the "Email" column empty. Unlike contacts that have already been invited to Perchwell, email addresses will be editable for these contacts.

First name	Last name	Email	Cell phone	Group	Status
Jim	Tester	jim@email.com	(123) 456-7890		Uninvited
Paul	Allen		(123) 456-7890		Uninvited
Sammy	Sosa	sammy.sosa@email.com	(123) 456-7890		Uninvited

Contacts missing email addresses will be excluded from any workflows that send emails from Perchwell, such as sharing a listing via email, sharing a saved search, sharing a report, and sending a message within Perchwell. In the event that an email goes out to a client with an empty email address, you will receive the following message prompting you to add an email address to the client:



Saved Searches

All saved searches made available by Paragon will be imported into Perchwell and linked to contacts. However, the **migrated searches will require review by all Baldwin members** for two reasons:

1. **Arbitrary Filter Elimination:** As of April 20th, 2026, the saved search information made available to Perchwell by Paragon unpredictably drops certain search filters, corrupting the integrity of your saved search data.
2. **Filter Translation:** The Baldwin REALTORS® MLS team is upgrading the structure of your listing database to align with modern best practices adopted across the industry and RESO (Real Estate Standards Organization). As a result, certain filters do not cleanly translate between systems (e.g. grouping "Other" property types under "Residential - Single Family").

Despite these two challenges, your saved searches will nonetheless appear in Perchwell upon first login, marked for manual review with the prefix of **[From Paragon: Unreviewed]** in the name of the search in Perchwell. You will be able to open, update these saved searches in Perchwell, and remove the label by changing the name as they are reviewed.

If you are updating a saved search in Perchwell and do **not** want the search criteria to refresh if/when Paragon’s data share is fixed pre-cutover, please update the name of the saved search to remove **[From Paragon: Unreviewed]**.

My Searches ✕

🔍 Search by name ↕ Created ▾ Open Contacts

Name	Contacts	Notifications	Modified	
☆ [From Paragon: Unreviewed] Fairhope under 250K	-		4/20/26	🔖 ✎
☆ [From Paragon: Unreviewed] 30 minutes to the beach	-		4/20/26	🔖 ✎
☆ [From Paragon: Unreviewed] Troy - 3bd 3ba Condo	Troy Palmer		4/20/26	🔖 ✎
☆ [From Paragon: Unreviewed] Baldwin County - Fixer-uppers	-		4/20/26	🔖 ✎
☆ [From Paragon: Unreviewed] John - Elberta Land	John Piyale		4/15/26	🔖 ✎

🔄 New Search Close

Importantly, Paragon has informed us they are working to fix the underlying issue impacting their system by May 6th, 2026. If Paragon is able to rectify their data share, following that date, **Perchwell will refresh all saved searches that still contain [From Paragon: Unreviewed] in their names.** From that point forward, any saved searches with this prefix will still need to be reviewed and updated manually as there may still be discrepancies due to filter translation challenges.

Arbitrary Filter Elimination

Perchwell accesses your saved searches via a data share with Paragon. While all saved searches appear to be available from Paragon, our team has observed inconsistent data that does not match the actual filters/criteria applied within Paragon.

The table below illustrates a possible filter elimination taking place between the criteria entered in the Paragon system directly versus what Perchwell receives from Paragon:

Search Criteria You Entered (in Paragon)	Search Criteria Perchwell Receives (from Paragon)
<ul style="list-style-type: none"> • Class: Residential-Single Family • Structure Style: Condo • <i>Bedrooms: 2+</i> • City: Gulf Shores 	<ul style="list-style-type: none"> • Class: Residential-Single Family • Structure Style: Condo • City: Gulf Shores

Unfortunately, there is no consistent pattern for how or why certain filters are being eliminated in data Perchwell receives from Paragon.

As a result, though Perchwell will create and link all saved searches to contacts in Perchwell, we cannot guarantee that the filters applied fully align with what was entered in Paragon.

Filter Translation

Approximately 92% of saved search criteria available in the Paragon system are fully translatable to Perchwell. However, though these searches are translatable, due to the arbitrary elimination of filters in the Paragon system (outlined above), not all criteria may be applied in Perchwell.

There are multiple reasons a saved search may not be translatable, most due to differences between the two systems. The most common causes are:

1. Searches using the 'All Features' filter in Paragon with an 'or' relationship between features under different groupings.
2. Searches filtering on 'Other' property types (Boat Slip, Fractional Ownership, Garage)
3. Searches filtering on the 'Active New Construction' status
4. Searches using fields that have changed to accurately portray which feature grouping a specific feature should live under (e.g. More than 2 pets allowed?)

Linking Saved Searches & Contacts

The Perchwell team has also worked to **link your saved searches to your contacts** as they were in Paragon. These linkages will be visible in Perchwell in two places:

First, contact detail pages on the “Shared Searches” tab on the left panel where all saved searches linked to that contact are displayed. Second, the saved search menu on the search page, where the contacts associated with each saved search will appear in the “Contacts” column.

My Searches

Name	Contacts
☆ [From Paragon: Unreviewed] Kelly - 4bd 5ba with pool	Kelly Miragliotta
☆ [From Paragon: Unreviewed] Troy - 3bd 3ba Condo	Troy Palmer
☆ [From Paragon: Unreviewed] Tessa - Investment Properties	Tessa Queri
☆ [From Paragon: Unreviewed] John - Elberta Land	John Piyale

Shared Searches

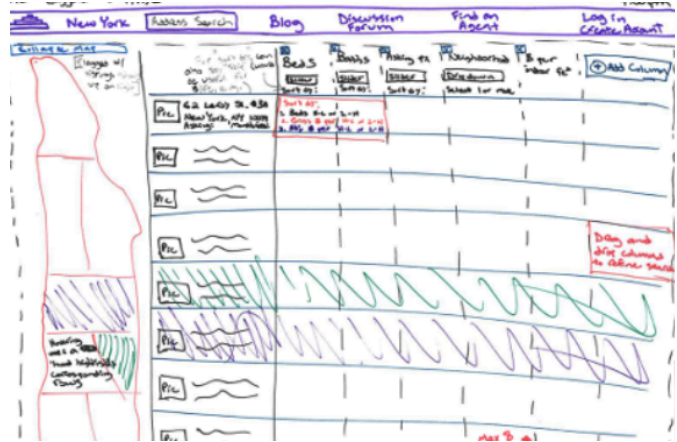
Searches you've shared with your contact

- [From Paragon: Unreviewed] Kelly - Land in Elberta Land | Active Listings
Last saved 2:46 PM, 4/20/2026
Shared 2:27 PM, 4/20/2026
- [From Paragon: Unreviewed] Kelly - Investment Properties
Residential Income | Baldwin | Active Listings
Last saved 2:45 PM, 4/20/2026
Shared 2:21 PM, 4/20/2026
- [From Paragon: Unreviewed] Kelly - Fairhope HS 3bd|3ba
Residential | Active Listings | 3 br and larger
Last saved 2:44 PM, 4/20/2026
Shared 10:22 AM, 4/15/2026

It is important to note that the integrity of these linkages is fully dependent on the data made available by Paragon. If Perchwell receives both a contact and a saved search with a valid association between them, they will be linked in Perchwell on your access date.

Perchwell Story

Perchwell was born from a simple yet important insight: real estate professionals need modern technology that matches their expertise.



Pictured: The first whiteboard drawing of Perchwell UX by CEO Brendan

Real estate professionals are master researchers whose insight shapes every transaction. However, we discovered that agents were underserved by fragmented tools that limited their ability to perform effective research and present it clearly to clients. Recognizing this gap, we set out to build technology to support and enhance the sophistication of the work agents perform.

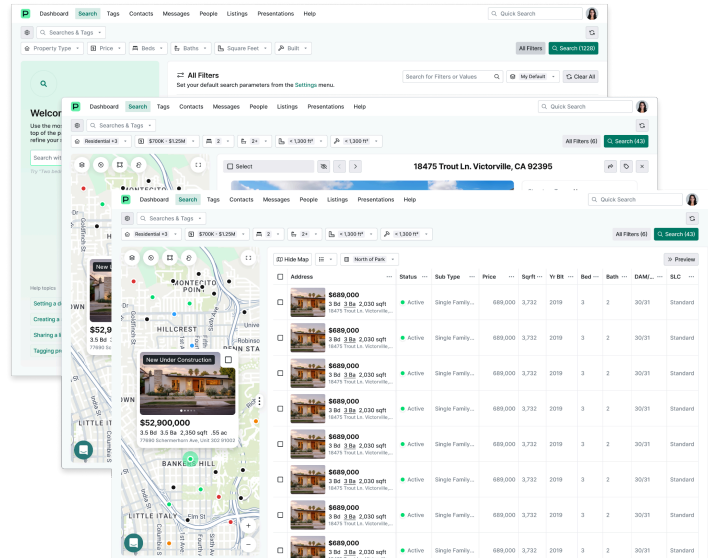
We launched our first product, Perchwell Analytics, to empower agents to interpret market conditions and deliver more confident client recommendations. Its success in New York City confirmed our hypothesis: agents needed more effective tools to grow their business and better serve their clients. Listening closely to early adopters, we expanded Perchwell along the transaction lifecycle. Our platform grew from a suite of connected tools on the same codebase to a platform aimed at driving agent efficiency through interconnected workflows.

Perchwell has since evolved into a complete MLS platform, encompassing all of the features you've come to expect. We continue to build alongside agents, brokerages, and MLS staff to translate real workflows into intuitive technology. For you, this translates to a platform shaped by real-world practitioner insight, continuously refined to make expert agents more effective.

Product Highlights

Search & Listing Detail Page

Perchwell Search is the heart of MLS workflows that offers a faster way to research listings and take action.



Interactive search refinement

Refine your search quickly by adjusting filter criteria in the results table without returning to the search form and losing sight of your search results.

Centralized workflows

Perchwell's search is designed to function as the heart of MLS workflows. From the results page, you can schedule showings, generate reports, share curated listings, or message clients and listing agents, all without switching tools.

Responsive workspace

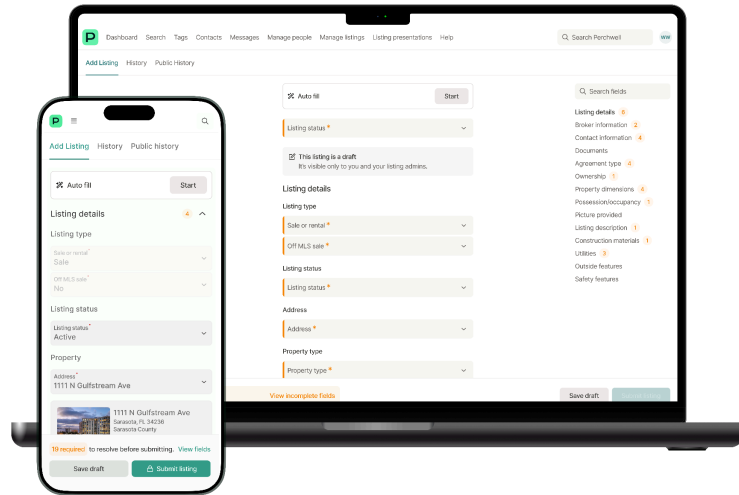
You and your clients can tailor the Search interface by adjusting map visibility, rearranging columns, and accessing different table views to accommodate unique working styles.

Intuitive listing research

Perchwell's Listing Details Page delivers an elegant and information-rich experience that streamlines research while providing clients a polished, professional view of each listing.

Add/Edit

Perchwell Add/Edit accelerates listing entry and simplifies MLS data compliance.



Perchwell Add/Edit form on web and mobile

Mobile parity

Mobile workflows mirror the entire Add/Edit web experience, making it possible to manage listings from anywhere.

Time-saving autofill

Auto-populate Add/Edit fields to accelerate listing entry.

One-click navigation

Rapidly navigate the form with a searchable field index, clickable sections, and jump-to-field prompts. Drag-and-drop and bulk photo upload reduce steps and manual effort.

Real-time compliance

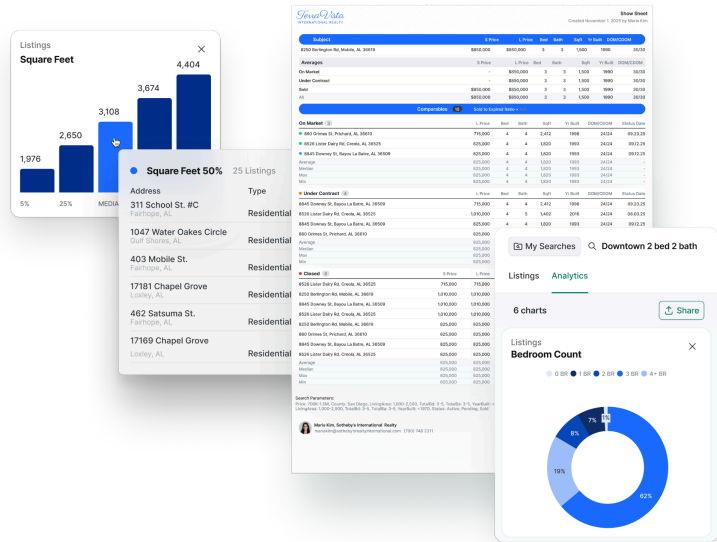
Perchwell reduces listing errors with real-time enforcement of MLS business rules, preventing data entry issues at the source.

AI listing descriptions

AI Scribe generates FHA-compliant marketing descriptions tailored to the nuances of each listing.

Reports & Analytics

Perchwell transforms complex market data into shareable insights through engaging, branded, and interactive client touchpoints.



Collage of branded and interactive listing reports

Premium client touchpoints

Perchwell report templates have been designed hand-in-hand with agents to deliver modern, beautiful, and branded client collateral that uphold a consistent professional standard.

Branded to you

Client-facing reports are branded with your logo, colors, and contact information, so every touchpoint reinforces your professional identity.

Interactive analytics

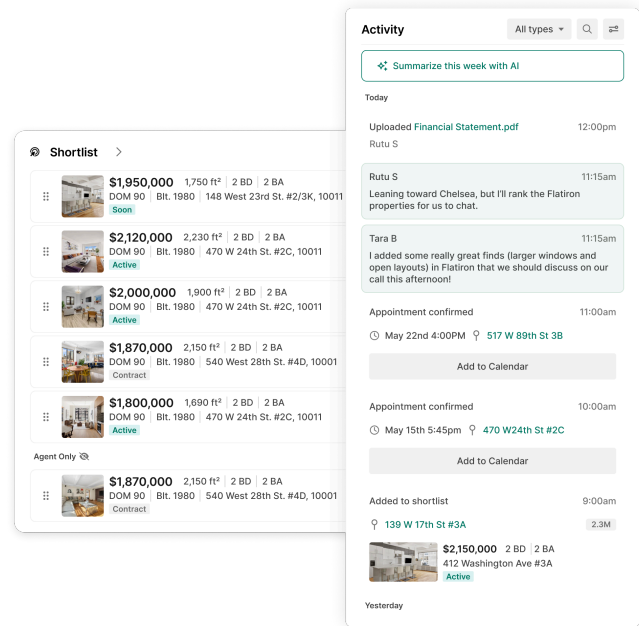
Visualize market data with interactive charts, such as price distribution pie charts, and click each segment to view the underlying listings.

Quick saved search analytics

Analytics for any saved search are only one click away on both web and mobile, integrating quantitative research into daily workflows.

Client Collaboration

Perchwell bridges the gap between member and client technology preferences with collaboration tools that feel familiar for clients.



Client shortlist and activity feed

Shared client workspace

Perchwell brings agents and clients into a single workspace where every listing, comment, and decision is captured in context.

Real-time collaboration

Clients can mark favorites, flag concerns, or ask questions on any property, and agents are notified as soon as there are new engagements.

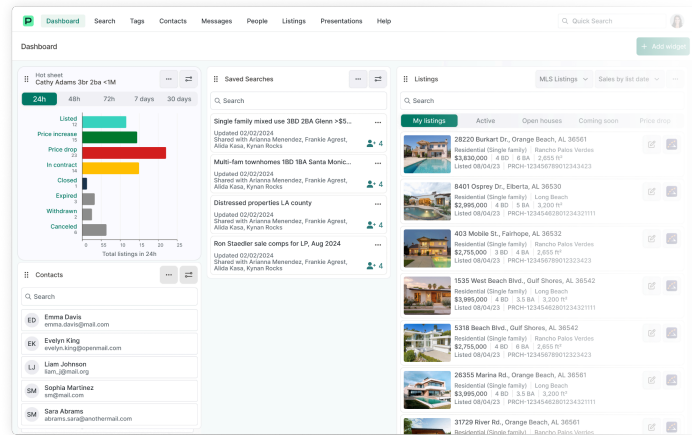
Collaborate on any device

Invite your clients to use the mobile app, send listings via text, and message clients within the app directly from any device.

Property-level conversations

Messages can be organized by individual property, so conversations stay in context instead of getting buried in a single thread.

Dashboard



Perchwell Dashboard surfaces real-time market activity and allows you to monitor active client needs efficiently.

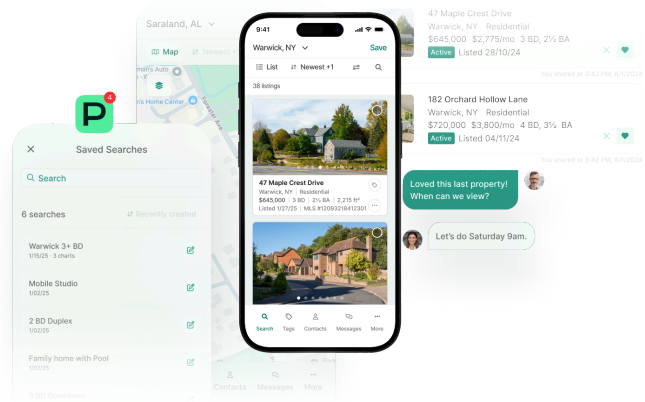
One-stop-shop Market snapshots, listing activity, saved searches, and analytics load in one view so you can move from insight to action quickly.

Reduced manual effort The dashboard surfaces new and changed inventory that matches an agent's criteria, cutting out repeated, manual Search checks.

Curated client view Configure hotsheets and views to track the segments of the market most relevant to each client, and because clients access Perchwell directly, you can curate a clear, real-time picture of how the market and their searches are evolving.

Mobile App

With a unified web and mobile experience, enjoy the same modern tools on mobile as you have on desktop.



Search and Messages on the mobile app

Unified web and mobile app

Perchwell delivers a unified experience across web and mobile, ensuring that every workflow, data point, and client interaction can start on one device and finish on another.

Complete parity with web

Perchwell Mobile has all of the same features as the web experience, empowering you to execute your entire workflow, from Add/Edit to analytics, on any device.

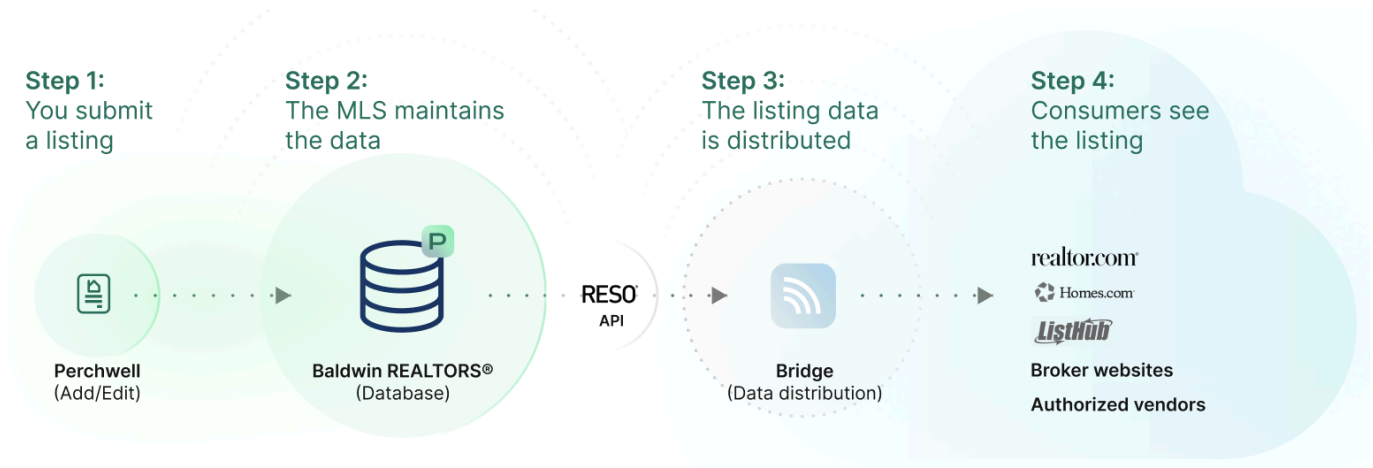
Mobile client experience

Clients enjoy a modern experience resulting in a streamlined client journey that strengthens relationships and accelerates transactions.

Your MLS Ecosystem

How Baldwin data moves from Perchwell to consumers

When you submit a listing in Perchwell Add/Edit, it moves through a distribution chain that displays the listing on Realtor.com, Homes.com, ListHub, broker websites, and any other authorized platform. Data distribution is managed by a system called Bridge, as selected by Baldwin REALTORS® MLS leadership, and it operates independently of Perchwell. Here is how that chain works:



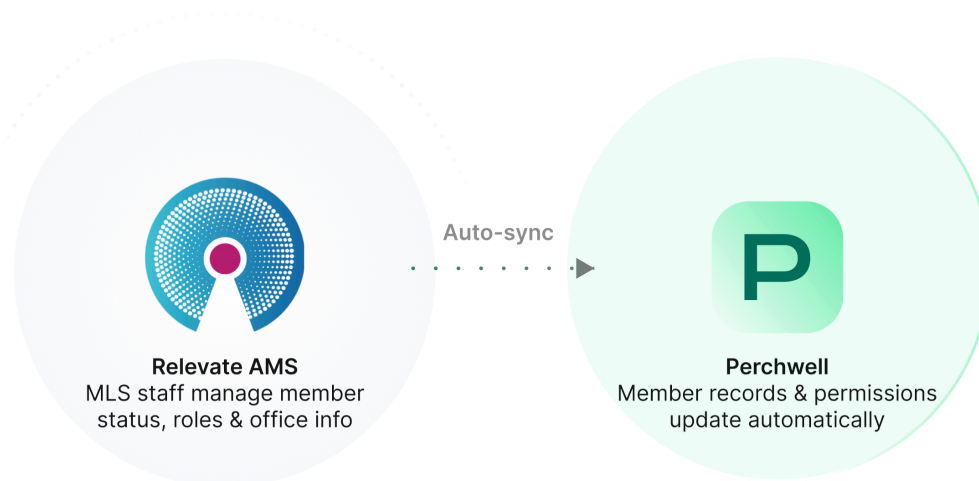
Step	Interface	Description
1	Perchwell Add/Edit	The syndication process starts when you enter your listing data in the Perchwell Add/Edit form, which follows your MLS input sheets similar to your current Add/Edit experience in Paragon. Setting both "IDX Include" and "Display on the Internet" to "Yes" ensures your listing is published and distributed downstream. Your portal selections (Realtor.com, Homes.com, and ListHub) determine where your listing data is sent.
2	Baldwin REALTORS® Database	Once submitted, your listing is stored in Perchwell's RESO-compliant database of Baldwin REALTORS® listings. Listings are visible to all MLS members unless they are brokerage exclusives, and available to MLS staff for compliance review.
3	Bridge	Perchwell shares your listing data with Bridge through a RESO-certified API. Bridge reads this data and routes it to all authorized third parties. Baldwin MLS staff ensure the right third parties are connected to Bridge.
4	Consumer Portals	Bridge distributes the listing to Realtor.com, Homes.com, ListHub, broker websites, and other authorized recipients. Most sites refresh every 15 to 60 minutes.

FAQ: Why is my listing wrong or out of date on Zillow, Homes.com, or a broker website?

If listing information is incorrect on an external site, contact the Baldwin MLS office using one of the support options at the end of this document. The most common causes are: (1) the external site has not yet refreshed; most IDX feeds update every 15–60 minutes; (2) there is a field mapping issue with a downstream system; or (3) the listing was submitted with incomplete or incorrect data.

How Perchwell connects to Relevate and your roster

Relevate, also known as MMSI, is Baldwin REALTORS®'s Association Management System (AMS). Relevate is the source of truth for Baldwin membership data. Information managed includes their name, license information, office affiliation, and access level. Perchwell ingests data from Relevate to automatically provision and update member accounts in Perchwell.



Information that Baldwin MLS staff manage in Relevate

All of the following information is controlled in Relevate and sync to Perchwell automatically, typically within minutes:

- New members and membership status changes (active / inactive status)
- Office assignment and primary office
- MLS access level, which determines what a member can do in Perchwell (add/edit own listings, manage all office listings, MLS staff, etc.)
- Member name, contact information, and license details, etc.

FAQ: Why is my membership information incorrect in Perchwell and how do I fix it?

If a name, office, status, or access level is wrong in Perchwell, please contact the Baldwin REALTORS® MLS office to correct the information. See the support section for contact information.

Relevate Single Sign-on (SSO)

Perchwell access is provisioned through Relevate Single-Sign-On (SSO) similar to other products offered by Baldwin REALTORS®. Simply click the Perchwell icon in the Relevate dashboard to log in. There is no need to create and remember a unique Perchwell password. When a member's status changes, (e.g. if a membership lapses or an access level is updated), that change immediately propagates to Perchwell. Inactivated members will not be able to access Perchwell via Relevate SSO.

Product integrations

You will retain access to every third-party tool you rely on today. Each tool is accessible directly from the Listing Details Page in Perchwell. Authentication is managed by Relevate's SSO, so you will not need to log in to the external tool you want to access.

Integration Name	ShowingTime	RPR	Sentrilock	CRS
Purpose	Schedule showings & view InfoSparks reports	Market trends & property data	Lockbox & key management	Public records, parcel data & ListingIntegrity
Login method	<i>SSO: no separate login needed</i>	<i>SSO: no separate login needed</i>	<i>SSO: no separate login needed</i>	<i>SSO: no separate login needed</i>

FAQ: Will I still have access to all the tools I use today?

Yes. ShowingTime, RPR, Sentrilock, and CRS are all available in Perchwell on day one. The experience is the same as your current system: clicking the integration icon takes you directly into the tool with no additional login. Your account data and history within each tool is not affected by the move to Perchwell.

What's Changing in Your Day-to-Day

Field & data representation upgrade

The Baldwin REALTORS® MLS team is upgrading the structure of their listing database to align with modern best practices adopted across the industry and RESO (Real Estate Standards Organization). These changes translate into more rapid integrations with other third party products and services for you and your team, better search results, reports, and user experience. Field and data model changes are changes to specific fields, property classifications, and how data is structured in Perchwell.

Notable Field Name Changes

The following field names in Perchwell reflect the RESO Data Dictionary standard, which is the same terminology used across modern MLS platforms and other third parties nationwide, so that the labels agents see match the language used by the tools, portals, and services connected to your MLS data.

Paragon Field Name	Paragon Sub-Options (examples)	Perchwell Field Name
Class	Residential Single-Family, Lease, Lots and Land	Property type
Property Type	Residential Attached, Residential Detached, Multi-Family, Mobile Home	Property sub type

Notable Data Representation Changes

Baldwin & Perchwell coordinated on making each of the following changes to improve data accuracy, search precision, or fair housing compliance. See the "why" column for additional details.

Field Name	What Changed	In Paragon	In Perchwell	Why
Property Type (FKA Class)	'Other' Property Type merged into Residential-Single Family	Boat Slip, Fractional Ownership, and Garage were subtypes under 'Other.'	These are now subtypes under the 'Residential-Single Family' Property Type	RESO does not include an 'Other' property type. Additionally, the 'Other' property type was frequently misunderstood/overlooked.

Field Name	What Changed	In Paragon	In Perchwell	Why
Property Status	Active New Construction merged into Active	'Active New Construction' was a distinct status.	ANC listings in Paragon will appear 'Active' with 'Construction Status' set to 'Under Construction'.	ANC was only created due to Paragon limitations that prevented accurate DOM calculation without the addition of an auxiliary status.
Area	Area field removed	Agents selected an 'Area' when entering a listing.	No Area field. Location is defined by address, geography filters (city, ZIP, draw boundary), or school district.	Fair housing compliance requires geographic data based on neutral, recognized standards. Baldwin opted to replace Area with objective boundaries (municipalities, ZIP codes, school districts).
More than 2 Pets Allowed?	Field is now a lookup under Community Amenities	'More than 2 Pets Allowed?' is a Yes/No field.	'More than 2 pets allowed' is a lookup selectable under Community Amenities	As all other pets-related fields are under Community Amenities, this improves the flow of Add/Edit.
Pool Features	Pool-related Community Amenity and Property Amenity options were consolidated under Pool Features.	Pool-related attributes split across Community Amenities, Property Amenities, and Pool Features.	All pool attributes grouped under one 'Pool Features' section.	One section makes pool attributes easier to find when entering and searching listings.
Year Built	Year Built now must be a valid year.	Any integer accepted as a year (e.g. 99999).	Only years between 1500 and 2030 accepted. If unknown, contact the county. If records were destroyed (e.g., hurricane), use the best available year (e.g., year the foundation was built).	Placeholder values reduce data quality. This ensures the most accurate year available is recorded.

Key workflow changes

Some workflows are slightly different in Perchwell. Each entry in the table below explains how things worked in Paragon, how they work in Perchwell, and the rationale/motivation for the differences.

Feature Area	Paragon Workflow	Perchwell Workflow	Context/Rationale
Quick Search	The Quick Search widget on the Home tab is customizable to highlight commonly used filters.	Navigate to the "Search" page, save one or more custom filter templates, and easily switch between templates for different highlighted combinations of filters.	The Paragon approach is limited to <i>one</i> template/set of filters whereas Perchwell's approach offers multiple filter templates for different use cases.
Search by Property Type (FKA Class)	Class has to be selected first before searching.	Click the 'Property Type' dropdown on the search filters page to limit results to one property type.	Agents can start with any filter and add property type when relevant. This also enables cross-property-type searches.
Search: Multi-Select Actions	Actions (email, print, export) are always visible.	Actions appear at the top of the page only <i>after</i> listings are selected.	Keeps the interface clean when nothing is selected and surfaces all actions in one place once a selection is made.
Add/Edit: Listing Entry Flow	<p>Separate forms for each property type.</p> <p>Not possible to change property types once the member start filling out the form.</p> <p>Must submit the listing to identify errors.</p>	<p>One unified, responsive form. The selected property type determines which fields appear, and the member can update the property type if needed after filling out the form.</p> <p>Business rules & validations enforced in real-time.</p>	Time saved in ease of navigation, rapid feedback on listing input errors and rule violations.
Client Collaboration: Sharing Listings	Listings shared with clients via public "CollabLink"; no client login required.	Messages serves as the client communication center (real-time messaging, push notifications, listing sharing, client reactions). Login is required.	Improved security in Perchwell: client conversations are kept private by requiring login to access.
Client Collaboration: Contact Details	<p>Contact email and phone number are always editable.</p> <p>Email address is not required to add a contact.</p>	<p>After a client is invited to Perchwell, their email and phone can only be edited <i>by the client</i> via their account.</p> <p>Email is a required field.</p>	Client Perchwell access requires email login, editing a client's email without notifying them would effectively revoke access.
Client Collaboration: Platform Email Logs	The history of emails sent from the Paragon platform to each client is searchable.	Members are automatically cc'd on all outgoing emails from Perchwell so that all communication is available in their email inbox.	Standard email clients (e.g. Gmail, Outlook) now provide extensive search/filtering & organization capabilities.

Feature Area	Paragon Workflow	Perchwell Workflow	Context/Rationale
Dashboard: Market Monitor	Market Monitor shows ≤30 days of listing activity within the MLS, firm, office, or team and can be filtered by Class, Type, Area, or City.	Hot Sheets can be filtered, linked to any saved search, and customized with different time intervals. Multiple hot sheets can be created and maintained side-by-side to view different market segments.	Creating multiple Hot Sheets in Perchwell allows for a greater degree of customization/tailoring to members' market and/or clients.
Search: Spreadsheet Layouts	Custom 'Spreadsheet' report views can be created and saved to view listing search results in different formats.	Save a column view "Template" that is accessible when viewing search results.	Column "Templates" in Perchwell can be changed without needing to leave the search results.
Add/Edit: Listing Descriptions	Agents write listing descriptions manually.	Perchwell's "AI Scribe" generates a description from entered property details. Members review and edit before publishing.	"AI Scribe" speeds up listing entry. FHA compliance is built in, but agents must still review for FHA compliance and accuracy before publishing. Listing Integrity review remains in place.
Search: "Features" Search	One "Features" field joins together all feature-related fields. Selecting multiple features uses OR logic (listings matching any feature appear in results).	Each feature category/field has a separate search filter. Cross-field OR not yet supported.	Unintuitive cross-field OR logic & user experience restricted in Perchwell.
Reports: Layout Customization	Customize reports such as the Agent All Fields Customizable and CMA Summary from the "Preferences" menu.	Static report templates tailored by Baldwin MLS staff & Perchwell's design team (such as the Quick CMA and the Full Report) offer consistent formatting & presentation.	Perchwell's reports are designed to surface key information in a visually appealing format. There are reports, such as the Full Report, that include all of the information related to a listing, and others such as the One Pager are designed specifically to meet the use cases they are designed for.
Dashboard: BR Announcements	BR Announcements website embedded in the Paragon "Home" screen.	BR Announcements website is accessible via an integration link on the sidebar of the Dashboard.	Perchwell screens stay focused on activity that takes place within Perchwell, and the BR Announcements is still accessible from a single click.

Feature Area	Paragon Workflow	Perchwell Workflow	Context/Rationale
Financials: Mortgage & Misc Calculators	~25 different financial calculators included under "Financials" for various scenarios.	Leverage free third-party solutions (e.g. Fannie Mae, Bankrate, SoFi, etc.).	Many freely-available third party options now exist online and can be easily identified.
Dashboard: Bulletin Board	"Message Center" on the home page allows for public posts visible to BR members.	Leverage Baldwin's own in-house bulletin board linked through Perchwell's dashboard.	Posts are relatively infrequent; no direct MLS platform tie-ins. More appropriate as a member benefit available outside of the MLS platform.

Upcoming Perchwell features

Perchwell delivers new features on a weekly basis, built with input from agents like you. The table below includes key upcoming features in Perchwell's roadmap that will be delivered before our cutover in August 2026.

Feature	Paragon Workflow	Planned Perchwell Functionality
Reverse Prospecting	Contacts → Reverse Prospecting	Let a listing agent compare their listing to platform-wide saved searches (from agents who have opted in) and return the matching agents' contact info plus the relevant search criteria and match counts, with optional outreach/email notifications as a next step.
Reports	The Reports tab from Search results	Perchwell offers a baseline set of reports today. We plan to expand this offering and welcome feedback from agents and brokers on additional reports that would better support your work.
MLS Statistical Reports	Resources → Statistical Reporting	Perchwell offers a baseline set of statistical reports. We welcome feedback from agents and brokers on opportunities to expand our reporting to better support your needs.
In-Platform SMS (Text) Messaging	Share → Text, from Search results	Share listings using SMS from your desktop, in addition to the existing email and Messages options.
Client Activity Tracking	Quick summaries of client activity are available on the Home page and Contacts pages.	Quick summaries of client activity on the Dashboard and Contacts pages.

Feature	Paragon Workflow	Planned Perchwell Functionality
Search Alerts	Advanced Email Options in a client's search management	Perchwell provides only a New Match notification trigger for Saved Search alerts (while a richer set is available for Tagged Listing alerts). Additionally, Perchwell provides matching same day notification options for agents and their clients. Perchwell plans to expand these capabilities based on agent feedback.
Recent Searches	Last Search	Allow users to quickly find and re-run a recent search that may not have been saved.
Search Filter Templates	Search by property type	Provide users with the ability to create a custom set of filters on their search filters page to streamline searching by property type or simplify the search experience.
Images in Email Signatures	Preferences → Email → Email signature	Provide users with the ability to customize email signatures with the photo, logo, and branding of their choice.
Flood Zone Map Layer	Map Search → Layers → Flood Plain	Provide a map layer that displays FEMA Flood Map service data as an overlay to better understand the flood risk for listings.
Subject Property CMA Flow	CMA → Subject Property	Users can identify a subject property from the MLS, then search for comparable listings based on the subject property's characteristics, select comps, and then move into generating a CMA using the reporting wizard.

New terminology

Perchwell uses slightly different naming for some features. Use this list to quickly translate Paragon terms into Perchwell terms.

Paragon	Perchwell
Class	Property Type
Property Type	Property Subtype
Active New Construction	Active + Construction Status = Under Construction
Partial (listing)	Draft
Home	Dashboard
Maintain Listings	Manage Listings (or add/edit)
Roster	My MLS (in "Contacts" for all members); Manage People (admins)
Copy / Clone (listing)	Duplicate
Statistical Reporting	Analytics (or Broker Analytics)

WHAT'S CHANGING

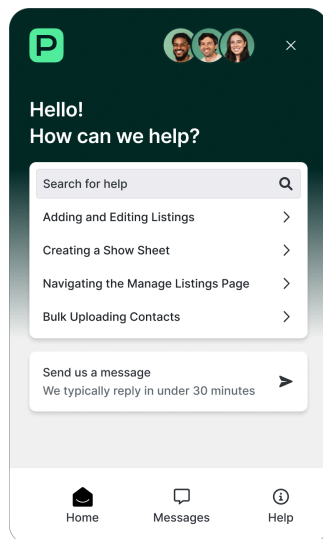
Paragon	Perchwell
Market Monitor	Hot Sheet (Dashboard)
Spreadsheets	Search column "Templates"
Collaboration Center / CollabLink	Contacts + Messages
Listing Carts	Tags
Paragon Help	Help Center (Intercom chat icon) or "Help" button
Paragon Connect (mobile)	Perchwell app (iOS & Android)
Financial Amortizer	Mortgage Calculator (on each listing detail page)
CRS Tax Autofill	Autofill (in Add/Edit form)
About Me Page	User Settings (upper right nav) → Profile
Power Search	Universal Search ("Search" in the upper right nav)

Support



Perchwell

When to contact	<ul style="list-style-type: none"> • Field requirements for Add/Edit • MLS violations • A listing is missing • An integration is not working 	<ul style="list-style-type: none"> • How to use Perchwell • Glossary questions • Workflow support • A listing from Paragon isn't in Perchwell • Product feedback • Conversion questions
Email	mls@baldwinrealtors.com	support@perchwell.com
Phone	(251) 270-0328	N/A
AI Chat	In-app	In-app



AI chat support

Perchwell offers AI chat support to help you get answers as quickly as possible. Once inside the Perchwell system, select the support icon in the bottom-left corner of the screen. You can then search the self-serve help center or send a message to get a quick response.



Where agent work happens.

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