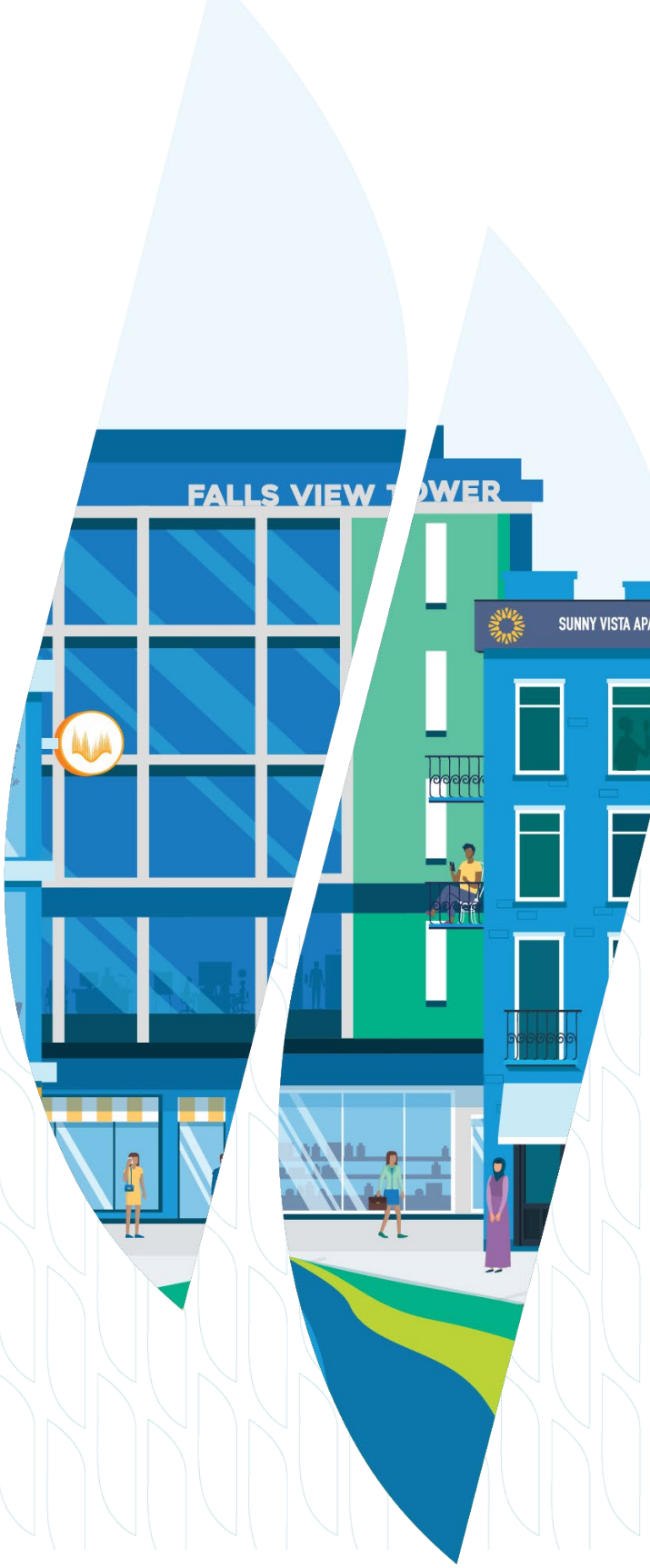
REAL ESTATE SOFTWARE



January 2026

G-Cloud 15 Service Definitions

MRI SwapTracker

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Solution Overview

MRI SwapTracker provides a case management system that enables landlords to significantly reduce the level of administration required to complete the Mutual Exchange process from initial application to decision.

Tenants applying for an exchange have their own online customer portal which increases transparency and minimises enquiries and contact.

Service Features and Benefits (for Tenants)

- Easy to use mobile-responsive portal
- Simple online application form with digital signature
- Personal dashboard shows a clear guide as to exactly where they are in the swap process, Reducing queries and anxiety
- Secure document upload for providing proof of identity, etc
- Inspection/Meetings calendar
- Documents and Letters viewable online
- Landlord to tenant messaging via the portal
- Automatic notifications when any updates to their application
- Dedicated tenant email support

Service Features and Benefits (for Landlords)

- Cloud based – quick and easy implementation
- Software as a Service (SaaS) ensures you're always on the most up to date version
- Process all your mutual exchanges digitally and in one place
- Fulfils Regulator of Social Housing's Consumer Standards for Mutual Exchange
- Renting Homes Wales transfer process compliant
- Scottish mutual exchange decision deadline process compliant
- Reduces admin time for mutual exchange teams
- Minimises tenant queries and unnecessary contact
- Integrated with MRI HomeSwapper – one simple login
- Summary dashboard for your organisation
- Personalised dashboard for individual officers highlighting actions required
- Reduces the risk of exceeding decision dates
- Exchange builder – create and visualise the whole exchange (2-way or multiswaps)
- Configurable tenant check lists
- Request supporting documents from tenants online
- Online document confirmation and signing option
- Schedule inspections/meetings
- Request online tenant references from other landlords
- Generate letters including your own custom templates
- Message tenants securely via SwapTracker

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- Private messaging tool for landlords to communicate with each other
- Automatic notifications for any updates/actions so you don’t miss anything
- Downloadable data “bundle” containing all information (including documents/letters) relating to an application
- Full audit history for your mutual exchange applications
- Comprehensive reporting suite (including days for decision analytics)
- Configurable GDPR data retention rules according to your organisation’s policy
- Dedicated landlord phone and email support

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Implementation

4D Framework

MRI has updated our project implementation methodology to the 4D Framework. This is a Client-Centric, project management led approach to solution delivery for all MRI Software offerings. Replacing the Unified Framework, which has helped guide many of our clients' projects for more than a decade, the 4D Framework will be utilized globally, bringing forth exciting new elements and standardised processes. These enhancements will benefit all teams by establishing well-defined methods for essential activities and bring increased return on investment to our clients world-wide.

From Define to Deploy



Our approach will be to scope a number of defined periods of activity or ‘sprints’ based on your business priorities within each phase.

The activity and expected outcomes for each sprint will be agreed and planned prior to the sprint commencement so that the relevant resources can be made available from all parties involved.



Regular checkpoint meetings will be held during the sprint to monitor progress against the plan. The end of a sprint would normally see one or more components being moved into live operation at Customer.



Example project plan for illustration purposes only.

MRI recognise that clients may have other solution projects that will also need to be reflected in any overall program.

Before project commencement, MRI will work together with clients to thoroughly review the 4D Framework and ensure project plans are signed off with client agreement.

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Learning & Training

Learning and training are essential to the success of the project and to laying the foundation for ongoing, rewarding day-to-day use. Therefore, during project initiation, we will work with you to design the correct approach for your users which we recommend is built around the following framework, and which will cover all elements of the solution being provided.

Knowledge transfer

Key members of the Client project team will have the opportunity during workshops to learn by involvement in the decision making processes for configuration, and is continually reinforced during the project in design, configuration, testing and training workshops This will help them become 'super users' able to train, guide and inform the wider Client user community both during the project and beyond, within their designated work stream business areas

Train the trainer

This is a key component of MRI's successful training approach and consists of structured training courses on a test environment which will contain Client's configuration and data, and which will be tailored to reflect Client's procedures. As well as replicating the 'real world' for wider user training, this will also equip those trained (who may also be 'super users') to conduct user testing within their designated work streams.



System / technical administration

Where appropriate, training will be provided for those who will be responsible for ongoing maintenance e.g. user set up, security, printing, etc.

End user training

It is our experience that end-user training would be best delivered by suitably trained staff within Client, as set out above.

Therefore, we have not included services for end user training, although this could be provided if required and would be assessed, costed and agreed through change control procedures.

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Project Teams

We will always try to be flexible in line with Client requirements and deadlines. Depending on the availability of resources there may be a lead time from contract signature to kick-off. The timing starts from when a Project Manager is assigned.

The major tasks involved in the project will be:

- **Business process workshop sessions**
- **Data migration.** This will require you to extract the data from your current system, cleanse that data and then load into our import templates. We will then undertake the upload and validation of that data.
- **Reporting toolset consultancy.** This will comprise our SSRS reporting engine and our Dashboard tool
- User testing. We will provide consultancy to assist with this process.
- **Go Live.** We will provide consultancy to assist with the go live period. MRI also offer a period of early life support to any new client for a defined period, before you transition to our wider support team.

Throughout this project, you will have a dedicated Project Manager from MRI to provide a governance framework around deliver. We would expect you to nominate the main point of contact on the client side to work with our PM.

It is also worth considering across the identified major tasks, what the makeup of your project team will look like. We have identified below the key roles we would expect from your side.

We recommend that you identify the key stakeholders and form a project team as early as possible. We understand that resource availability can impact the progress of a project, so some of the below roles may be consolidated or fall to the same individuals. We can adapt our implementation methodology and timeline to accommodate this. Some clients have significant project team sizes, whilst others have just a couple of individuals form part of their team.

Recommended Client Project Roles

Project Sponsor:
They are responsible for the overall business case, and budgetary control. They hold overall responsibility for the delivery of the project and determining whether the product has provided the expected business benefit.

Project Manager:
They will work closely with MRI's Project Manager to maintain the project progress. They will coordinate project activities and agree on tracking and report on project progress, and risk management.

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Workstream Leads:
Workstream leads are Senior Client's employees who are responsible for the final sign-off of business requirements for their business area.

Super Users
Super Users are specialists in processes within the scope of the project and report to their workstream leads. After go-live, the super users are essential in supporting staff in using new systems and processes.

Data Owner(s)
Data Owner(s) are responsible for the transfer and validation of data into the new software solution and will work closely with MRI's Data Migration Consultant

MRI Project Roles

The key members we usually assign to the implementation project team are:

Project Sponsor
They hold overall responsibility for the commercial relationship with Client's. They will direct and oversee the project team, monitor progress and act as an escalation point for issues.

Project Manager
They will make sure that predefined goals are met. They will provide regular status updates to all key stakeholders to track the project progress and risk status.

Principal Consultant
They hold overall responsibility for the consultants working on the project. They will manage specialist resources and assign resources to the correct workstreams, as well as manage work package delivery and report back to the Project Manager.

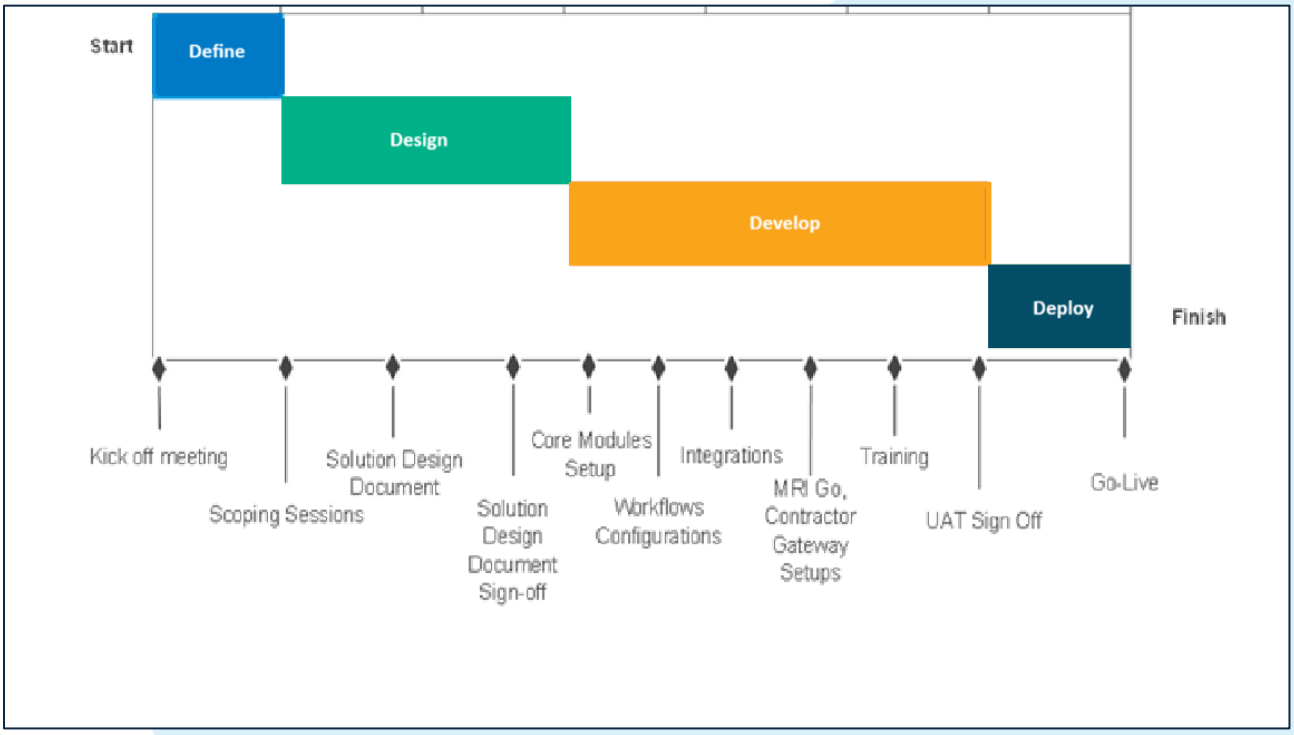
Specialist Consultants:
They are subject matter experts who provide professional inputs to help Client's receive the best solution. They report to Client's Project Manager.

Data Migration Consultant
They are a Specialist Consultant responsible for the transfer and validation of data into your new MRI SaaS Solution.

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Until the contract has been awarded, the project team resources cannot be assigned. With over 280 global professional services members, it is impossible to know at this stage who will deliver the project.

Through our framework, we can consistently deliver high quality, successful projects that meet the client's requirements while ensuring scalability for the future. No matter the MRI Offering, geography or project size, our clients know what to expect through the five stages of delivery and governance.



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Customer Service & Ongoing Support

Service Management

Your MRI Project Manager will handle the implementation phase. During this time, your Account Manager will stay with you and be a point of contact if any issues arise. The MRI Project Sponsor will be a permanent secondary contact.

After implementation, if there is an issue, the first contact would be the Client Support Helpdesk. If they can't resolve the issue, it will be escalated to the Client Support Team Leader, then the Client Support Director, and finally your MRI Account Manager.

Managed Services



MRI Managed Services offers a range of services for lease administration, property accounting, and system administration. These services are provided by a team of property and finance professionals with a strong track record. They have deep knowledge of industry processes and compliance requirements, combined with a deep understanding of MRI's solutions. Our teams can help reduce your overheads, improve operational efficiencies, and free your team to focus on strategic business goals.

Whether it is MRI's System Administration service to handle all tasks related to your project, MRI's Property Accounting service combining industry knowledge, accounting knowledge, and software knowledge, or lease administration, MRI Managed Services are available for your convenience to ensure no resources are missing in your company workflow with the least costs involved

Recurring Services

MRI's Recurring Professional Services Package allows you to buy service credits at lower rates

and lock in those rates for up to three years without compromising on service. For example, work with your dedicated MRI team who'll advise on service contracts and deliver training and consulting from anywhere. You can also have peace of mind with access to MRI solution experts with fast response times. You'll receive insights into your technology performance, status reports, and service improvements to help reduce the threat to your technology and keep teams productive.

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Service Delivery Framework

MRI is proud to be a customer-centric organization, always looking to deliver an exceptional customer experience and drive continuous improvement across our business. Our methodology is in line with ITIL standards and built up over four decades of experience in providing real estate technology solutions. We include maintenance and support for all our clients as part of the annual fees.

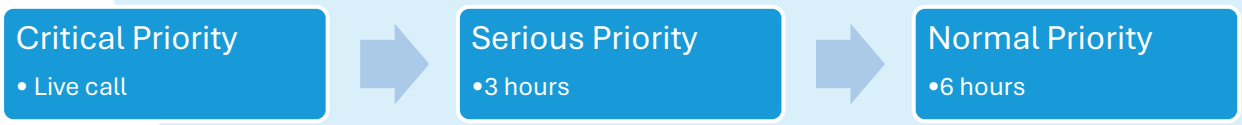
Client Support Team

Service Management

Our in-house support team knows our software well, so they can solve most support calls directly and can be reached through the myMRI portal or by phone. No matter how you contact them, all support calls are tracked and managed until they are resolved using our case tracking software.

The Client Support Team is available by phone from 08:30 to 18:00, Monday to Friday, except holidays and Sunday to Thursday in RSA. Support cases can also be logged 24/7 via the myMRI portal, where users can register new cases and track existing ones.

MRI's Global Client Support group will make every effort to ensure that submitted cases are given the right level of severity. We respond to cases in the order they are received, with higher severity levels getting priority. Response Time is the time it takes for a Global Client Support representative to first contact the person who submitted the case.



**Response times listed above are estimated targets. Response time is not a resolution goal and should not be interpreted as a guarantee of service. MRI's Global Client Support group will use commercially reasonable efforts to adhere to the time frames listed above. Global Client Support does not provide resolution targets, and Response Time should not be interpreted as a commitment regarding resolution timeframes.*

Release Cycle

We invest in research and development to keep improving our products. We release regular software updates during the year and inform clients about key features before the release date. We can help with planning the testing phase and deploying the updates to the production environment if needed. For on-premises solutions, clients are responsible for loading the update code.

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We aim to keep our products ahead of legislation changes. When developing our product roadmap, our development director reviews upcoming legislation changes, gathers feedback from regular focus groups with clients, and applies our overall product vision.

Support Portal

Our client portal lets you report support issues and get instant updates on your cases. It also has forums for product suggestions, training materials, documentation, and case updates.

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Information Security

Data Security arrangements for client data

Standards and Governance

Our services are provided in accordance with the Cyber Essentials standard, the ISO 27001 information security standard best practices, and have been regularly penetration tested by a third party.

An Information Security Policy is in operation across MRI to support the confidentiality, integrity, and availability of MRI SaaS Solutions. The policy includes appropriate controls relating to physical security at MRI locations, technical security with respect to client data, organisational security arrangements for employees and subcontractors (including training and vetting), disaster recovery and business continuity, vulnerability testing and security audits, and data breach procedures.

MRI's Information Security Policy complies with all applicable laws, is reviewed annually, and updated as required. Policies are available to all staff, with changes communicated as appropriate. Training takes place as part of induction and is refreshed annually, with additional role-specific training for technical teams.

Personnel Security

All MRI staff undergo pre-employment screening via HireRight, covering identity verification, employment and education history, criminal checks, SSN trace, drug testing, and national criminal search.

Employees complete mandatory security and confidentiality training at induction, with refresher training delivered annually and completion tracked by HR systems. Training is tailored by role, with technical staff receiving more advanced security training.

Access Controls

Access to client data is based on the principle of least privilege. User accounts have only the permissions necessary to perform their role. Permissions and access levels are reviewed regularly, with management approval required for any changes.

Within the application, client administrators can control permissions at both process and function level, setting read, write, delete, or deny access. Permissions groups can be configured by role or functionality.

Client data access by MRI personnel is restricted to a limited number of authorised support staff, only for activities such as troubleshooting, training, or maintenance. Such access is controlled, audited, and reviewed.

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Encryption and Cryptography

All client data in transit is encrypted with TLS 1.2/1.3. All data at rest is encrypted using AES-256 Transparent Data Encryption. Encryption keys are managed in line with MRI's Cryptographic Policy. MRI's Information Classification Policy provides detailed guidance on security classification and correct handling of assets.

Application and Infrastructure Security

Production and test environments are maintained in separate subscriptions.

Developers and testers follow MRI's Secure Development Guidelines, are trained annually in OWASP vulnerabilities, and operate under change control processes.

MRI uses proactive daily monitoring of services, runs regular internal and external vulnerability scans, and engages CREST-certified third parties to conduct annual penetration testing of applications and infrastructure. Findings are tracked and remediated.

MRI Cloud Application Accounts are unique to a given user. MRI Cloud Technical Platform accounts (e.g., Oracle SYS, SQL Server SA) may be shared in accordance with defined security roles and responsibilities.

Third-Party and Supply Chain Security

MRI Cloud Services supply chain is managed according to MRI supplier management procedures. This includes security obligations in contracts, confidentiality agreements, GDPR/Data Protection Act compliance, and risk assessments during onboarding and change. All supplier contracts are reviewed by MRI's Legal team for compliance requirements. MRI's data centre providers are independently audited and certified.

Monitoring and Logging

As a hosted solution, MRI will be responsible for monitoring.

MRI utilizes a variety of tools to monitor the health, performance, and security of our global data centers. MRI SaaS Technical Platform automatic alert/monitoring takes place at Infrastructure, Virtualization, Security, Operating System and Application Level. Access to monitoring is restricted to MRI Software Engineering and Operations.

MRI Software uses a 3rd party SOC for managing our SIEM and monitoring events generated by it. Applicable host and infrastructure logs are forwarded to our SIEM, and application logs will be incorporated at a later date.

Any service-level incidents are managed internally within our CRM system. All client incidents in relation to availability can be reported and viewed via the myMRI portal, and clients can sign up for notifications.

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Incident Response

MRI maintains a robust Incident Management programme. Incidents follow three stages: Investigation (discovery and evaluation), Protection (containment and eradication), and Restoration (remediation and recovery). Lessons learned are documented in After-Action Reports and updates made to training and processes.

In the event of a data breach, MRI will without undue delay:

- Investigate the cause.
- Notify the client and provide sufficient information for regulatory reporting.
- Contain and remedy the breach.
- Take steps to mitigate impact and restore integrity.
- Assist the client in remediating or mitigating any damage.
- Notification is provided in line with GDPR and contractual requirements.

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Data Retention

MRI solutions enables you to set your own data retention period, i.e. 7 years, and this is agreed during your implementation.

MRI complies with all laws and regulations applicable to our services and industry, including GDPR and Data Protection Act 2018.

We focus on keeping our products ahead of legislation changes. Under GDPR we have obligations as a Data Processor, different from the obligations held by Client's as a Data Controller. This is detailed in full in the Data Protection and Security Schedule which forms part of our standard terms and conditions/master contract.

In addition to meeting our own compliance requirements, we have taken steps to help support our clients in meeting their GDPR requirements. Please see our dedicated GDPR page for FAQ on GDPR: https://www.mrisoftware.com/gdpr/

Our "Data Retention Policy" outlines record/contract/document retention; however it is not auditable by our clients. This document is classified as confidential and as such, we can't share it externally.

Data will remain in the system until Client's take steps to archive or delete the data. While in the Live environment, data remains fully accessible and editable. Client data will be managed by Client's staff in accordance with your own data handling processes, including consent and retention.

As the data processor, we will only process/destroy data under the instruction of Client's/data controller.

Can data be automatically deleted after a set period (ie 6 month)

Yes. Clients' will be able to set it's own data retention rules per application type and status.

What In-house technical capabilities to implement and maintain is required?

None. The solution is cloud-hosted Software as a Service (SaaS) and requires no on-premise infrastructure or technical resources from client's.

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Information Security Council: An executive-level board

We benchmark the team's role and size based on our company, our clients' industries, and the sensitivity of the data we house. The Information Security Council and InfoSec Team annually evaluate the role, scope, and size of the team.

We operate an Information Security Management System following ISO 27001 best practices. Our policy includes controls and measures for:

- Physical security at all MRI locations involved in the Services.
- Technical security for Client Data in MRI's possession.
- Organizational security for employees and representatives, including training, awareness, staff vetting procedures, passwords, and security credentials.
- Vulnerability Testing and Security Audit.
- Data Breach Procedures.

Our policy follows all applicable laws and is reviewed and updated yearly.

The Information Classification Policy guides the correct security classification of information.

The MRI Acceptable Use Policy covers:

- Computers
- IT Equipment and Devices
- Removable Media
- Mobile and Remote Working
- Assets and Office Equipment
- Usernames and Passwords
- Administrator or Privileged Accounts
- Software
- Internet and Email
- Instant Messaging (IM) and Collaboration Platform (CP)
- Reporting Security Incidents
- Acceptable Use Policy Monitoring and Review
-

Security & Compliance: Making sure our applications meet security standards

We are certified with Cyber Essentials and set up our environments to follow the NCSC 14 Principles of Cloud Security. MRI has an Information Security (InfoSec) team approved by senior management. The InfoSec team includes security professionals working with the Information Security Council to review security policies, technologies, and strategies for MRI Software

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Core Tools & Functionality

MRI Agora Platform

“The Platform that Powers PropTech™,” MRI Agora is revolutionising the way organisations bridge the gap across all proptech systems. MRI Agora is industry’s first AI-powered, flexible, and hyper-connected platform that uses smart data to deliver deeper insights.

Agora Insights

Put your data to work for your business

The MRI Agora Insights data and analytics solution empowers your real estate teams to make better decisions with fewer clicks so you can spend less time looking for data and more time acting on it.

Key Features

- Unified data services layer consolidates all your business data in one place, allowing for fast access
- Powerful solution specific, out-of-the-box dashboards provide immediate value
- Singular place to view cross-product analytics and trends
- Customizable dashboards and reports to meet your unique business needs
- AI-enabled Q&A engine to support ad-hoc queries in real-time

Business Benefits

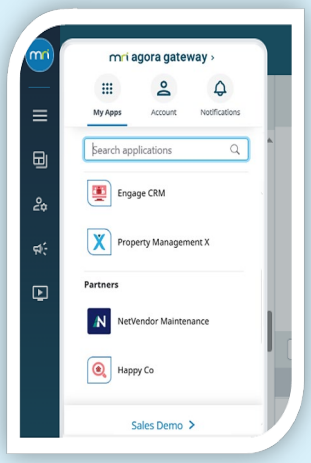
- Gain better insights with a single access point for consolidated data
- Save time from searching by giving teams consistent access to the data they need
- Prioritize needs by identifying trends over time and proactively addressing anomalies
- Get answers at your fingertips
- as and when you need it with AI-driven analysis

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Agora Gateway

Optimize Workflow. Unify Your Experience. Streamline Navigation.

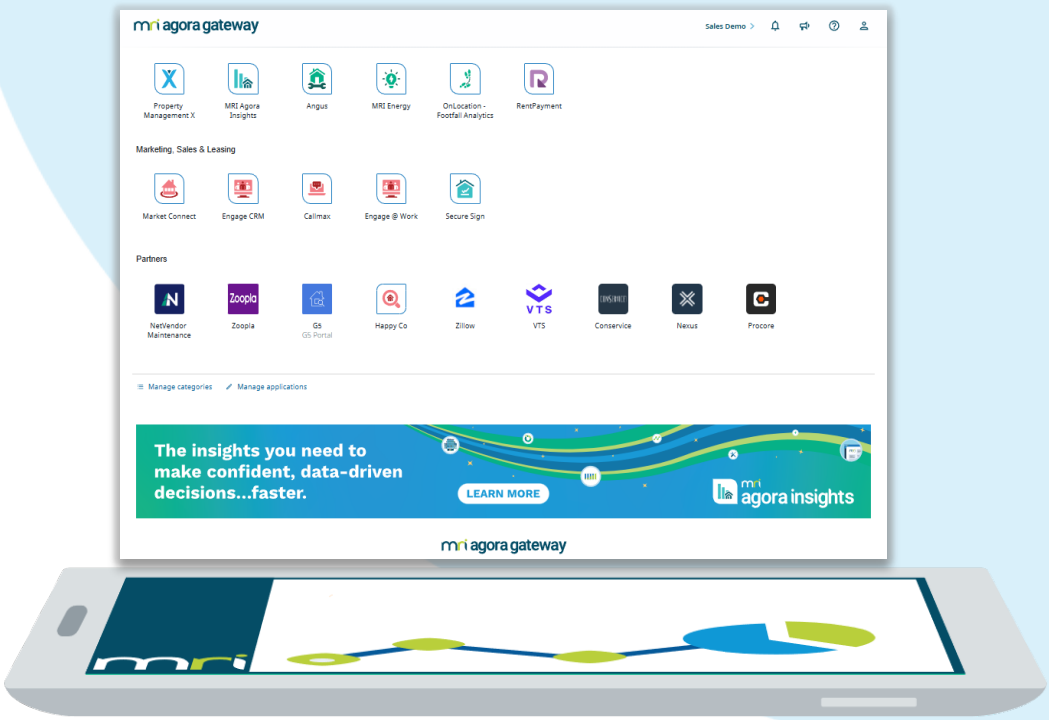
Welcome to The Agora Gateway, MRI Software's new centralized login page. Single Sign On, designed for the way you work, a central landing page for all solutions in your ecosystem plus quick and easy navigation between applications. MRI Agora Gateway is a simple, secure and flexible home for users to enter and navigate their journey through the MRI ecosystem, streamlining operations and unlocking a connected user experience



Key Features

- Centralized & sleek navigation via the Agora
- in-product widget
- Notifications system for comprehensive
- portfolio wide cross product alerts
- Personalized client and user experience
    - ✓ Admins add client specific apps and assign
    - ✓ Users may add their own apps

Users may categorize and reorder apps



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About MRI

Founded in 1971, MRI is a pioneer of the real estate software industry. From the day we opened our doors, we set out to build game-changing solutions.

MRI's comprehensive and flexible technology platform coupled with an open and connected ecosystem meets the unique needs of real estate businesses—from lease administration to property-level management and accounting to investment modelling and analytics for the global commercial and residential markets.

OUR MISSION

Giving organizations the freedom to transform the way communities live, work and play through the industry's most comprehensive, flexible, open and connected technology platform.

Regardless of size, location, or property portfolio, we understand that every company has unique needs. Real estate owners, operators, occupiers, and investors seek open solutions, configurable to their specific business requirements and goals.

MRI develops lasting client relationships based on nearly five decades of expertise and insight. Through leading solutions and a rich partner ecosystem, MRI liberates real estate companies to elevate their business and gain a competitive edge.



While our operations make us one of the biggest companies of our kind, our experienced and knowledgeable regional teams mean we always offer a personalized approach.

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Our People



The company you partner with should have experienced people who can support your business needs. Many of our employees have been with MRI for 15, 20, and even 30 years or more and provide tremendous knowledge and experience to our clients.

MRI is also just a collection of fun, knowledgeable, and hard-working people who are a joy to work with! MRI's client conferences and industry tradeshows are not only valuable business events, but often provide memorable personal experiences for our clients, partners, and employees.

MRI Software Foundation

Transforming the way communities live, work and play

The MRI Software Foundation's mission is to strengthen underserved communities through sponsorships, grants and volunteerism.

MRI Software Foundation UK - Established in January 2022
MRI Software Foundation - Registered as 501(c)(3) private foundation in 2021
MRI Software Australia Public Ancillary Fund - Established in October 2021

Since its inception, the MRI Software Foundation has deployed more than £350,000 on four continents, based on staff member requests, in support of our mission.

- Literacy
- Science & Technology
- Homelessness
- Food Banks & Meal Services
- Disaster Relief

For more information about the MRI Software Foundation please see https://www.mrisoftware.com/mri-software-foundation/.

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Social Value

MRI Software views social value as a fundamental outcome for social housing, recognising that providers influence individuals and communities far beyond financial performance. For MRI, social value encompasses improving lives, fostering sustainable tenancies, enhancing community wellbeing, and driving positive change across areas such as employment, health, digital inclusion, and social cohesion.

MRI supports social housing organisations in evidencing and measuring the broader impact of their work through advanced, data-driven systems and analytics. This enables providers to meet strategic objectives like securing funding, complying with regulations, and highlighting service improvements.

Through powerful tools, data integration, and comprehensive reporting, MRI empowers organisations to transform social value commitments into tangible, measurable outcomes — helping housing providers create meaningful change and strengthen the communities they serve.

Furthermore, MRI demonstrates its commitment to social value through active volunteering and community initiatives led by the MRI Software Foundation. The Foundation focuses on supporting local communities, particularly in housing and education, by organising staff volunteer programmes and sponsoring impactful projects.

Examples include:

- Staff volunteering with homelessness charities, food banks, meal services, and literacy programmes directly benefiting social housing communities.
- Employee participation in volunteer events and fundraising efforts to provide educational resources, support community activities, and assist homelessness relief initiatives.
- Donations and support for organisations dedicated to community empowerment, housing assistance, and resident wellbeing, both in the UK and internationally.

For social housing customers, this translates into direct community benefits through hands -on volunteering and broader social impact investments—enabling housing providers to deliver meaningful value that extends beyond housing services alone.

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