OneHome User Guide

What is OneHome?

One Home is the new, robust client portal provided through Triad MLS and replaces the old Matrix Client Portal. It is web-based with a responsive design that automatically resizes to any device. One home offers many collaborating opportunities for the agent and the client. One Home offers great enhanced features clients may use.

Facts about OneHome (Instructions included in this User Guide)

- Clients can only use OneHome after receiving at least one listing from a Triad MLS user from their Matrix account.
- For recipients to receive listings through the auto-notification or concierge Matrix service the recipient must be submitted as a Contact.
- The first-time listing information is sent to a recipient "contact" a "Welcome to the Portal" letter is sent.
- The basic OneHome account allows clients to view all listing photos, property details and features, access publicly recorded tax information, view any upcoming Open House information posted in Matrix by the listing agent, use the OneHome Mapping features (boundary overlays, school info overlays and points of interest) and perform searches.
- Enhanced OneHome features are available if the client chooses to "Sign In" and create an account. Those enhanced features include marking listings as favorites or discards, comparing multiple selected listings, requesting a tour, add notes, save searches, and using the OneHome Planner.
- Agents can use Matrix Settings to select how they wish to receive notices of their client portal activity by using Portal Notifications.
- Agents can send listing information to their Contacts to view in OneHome by selecting individual listing(s) and/or Saving search(es) using New Auto Email.
- Agents can use Matrix Settings and My Information to customize their Matrix email signature and set up their agent profile for OneHome.

Educating Clients

- Before sending listing information to your new clients a document has been created to assist Triad MLS subscribers (agents) to educate clients on OneHome.
  "Benefits of the Client Activating a Free OneHome Account" found in Matrix Help Training Videos and User Guides – OneHome section.

WARNING: Triad MLS Subscribers (agents) should never add themselves as Contact in Matrix using their agent email address. Triad MLS Subscribers (agents) should never send listing information to themselves using their agent email address, then forward that information to a client. OneHome is not designed to function in this manner.

Triad MLS Subscribers (agents) desiring for all notices of new listings, price changes, and listings that come back on the market to be sent to them before the client must use "Concierge" function. See the Auto-Notification instructions below.

Basic OneHome Features for the Client

The first email/text from Matrix to clients that have been entered as a Contact will receive a Welcome to the Portal letter. To begin using OneHome, the recipient uses "View Properties". The basic client functions are:

- Viewing all listing photos, features, details, upcoming Open House information
- Access publicly recorded Tax Information
- Use of OneHome mapping features: boundary overlays, school data overlays, points of interest
- Perform searches

Enhanced OneHome Features for the Client

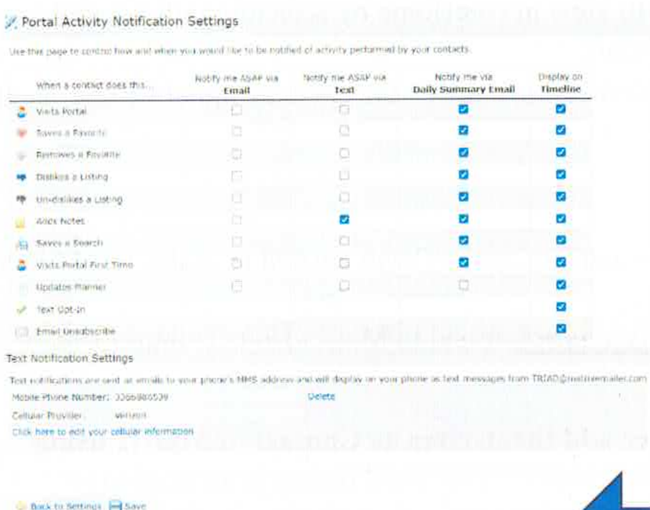
Optional for the client is to use "Sign In" on their OneHome page to create a free account. The benefits of creating this account are:

- ✓ Many client collaboration opportunities for both the agent and the client
- ✓ Client may mark listings as a favorite or discard (places in their "not for me" folder)
- ✓ Clients may use the Compare feature. Comparing multiple selected properties, view them in a side-by-side presentation.
- ✓ Client may Request a Tour which notifies their agent they would like a showing appointment (SEE PORTAL NOTIFICAITON INSTRUCTIONS)
- ✓ Client may Add Notes to listings.
- ✓ Client may "Save Searches" that they can access at a later time and view newly added listings
- ✓ Client may use the OneHome Planner that assist the buyer in navigating the home buying process

Portal Notification Instructions

From the Matrix home screen use the down arrow by your name then select "Settings". Use the Portal Notification Settings Link.

Use this page to control how and when you would like to be notified of activity performed by your contacts.



NOTE: If a client activates their free OneHome account they can "Request a Tour".

This notice is a Portal Note. If you wish to receive that notice ASAP you must select Notify me ASAP via Text on the "Adds Notes" line. You must also complete the Text Notification Setting section.

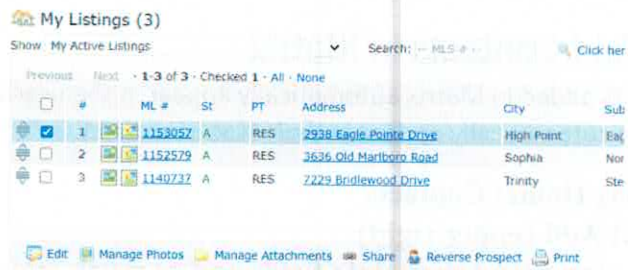
NOTE: If recipients are not receiving emails sent from Matrix

1. **Have recipient to check spam/junk**
2. **Ask if recipient has ever "unsubscribed" from any emails sent from a real estate agent in the Triad market. If yes, then**
    a. ***The client will*** **need to send an email to optin.triad@matrixemailer.com from the email that they have opted out from. Leave the subject line and body of the email blank in their correspondence. Once sent, it could take up to seven business days for the client to be opted back in, due to anti-spam compliance rules.**

Adding Contacts in Matrix: Matrix Home select Contacts Upper Right – ADD

NOTE for Listing Agents: Reverse Prospecting: This feature facilitates agents getting in touch with each other for their client's mutual benefit. Listing Agents more easily find agents with buyers looking for properties like the ones they represent for sellers. Agents representing potential buyers become more aware of available properties matching their buyer's criteria. Listing Agent find Reverse Prospect list by following these steps:

1. My Matrix – My Listing
2. Select My Active Listings
3. Select a listing
4. Select Reverse Prospect



AGENT: Name of Triad MLS agents that have emailed the listing to a Contact (client). Click the agent's name to email them about your listing. They can identify the contact via the Reference # by looking it up on their Contacts page.

COUNT: is the total number of listings each contact has been sent.

Reverse Prospect Results for 1153057

These agents each have a contact who has received this listing. Click the agent name to email them about your listing. They can identify the contact via the Reference # by looking it up on their Contacts page.
Count is the total number of listings each contact has been sent.

2938 Eagle Pointe Drive 1153057

Agent	Ref #	Pre-approved?	Count	Date Sent	Agent ID	Office ID	Office Name
Lisa Marshall	74845		2	08/21/2024	337353	GERL03	eXp Realty, LLC
Joe Baker	72286		4	08/27/2024	171308	GCHI01	Keller Williams Central
Carol Milligan	98300		5	09/06/2024	HMILLIGC	HATC01	Allen Tate High Point

When adding a Contact Reverse Prospect is selected by default. If adding a Seller as a Contact disable this feature.

NOTE: FOR LISTING AGENTS: My Hit Counter is also for Listing Agents. This can be found in the My Listings Widget and the My Listings drop down menu.

- **Sent**: total number of times this listing has been emailed.
- **Client:** total number of times this listing has been fully viewed. This listing sent out of Matrix 755 times either my agents directly or agents using Auto-notification with their clients. The email is sent via a thumbnail view, when the recipient clicks on the property to view all the details that is the Client Count.
- **Agent**: total number of times agents in Matrix have clicked on the MLS number and viewed this listing.
- **Favorites:** total number of times either an agent or a client marked the property as a favorite. Agents can mark listings as favorites in the MLS Touch app.
- **Possibilities:** this no longer tracks as Possibilities is not an option in OneHome.
- **Matches**: total number of searches performed by agents where the listing matched the criteria.
- **Last 14, 7**: in this example as of 7/22/2024 this listing was sent out of Matrix by agents 10 times in last 14 days and 8 in the last 7 days.
- **Published**: this listing was emailed from a client in One Home to someone else.
- **Rejected**: this listing was rejected by 9 clients in their One Home account.

Steps to Add Contacts in Matrix

NOTE: Contacts added in Matrix automatically appear in the user's MLS Touch Mobile app. Likewise, Contacts added in the user's app automatically appear in their Matrix account.

1. **Matrix Home: Contacts**
2. **Select Add (upper right)**
3. **Complete mandatory data fields and as much other information as desired.**
   a. **Multiple email addresses can be added for 1 contact (max 5).** Separate each by comma, no spacing. Be sure to select the desired Salutation. Examples:
      i. First Name: Rick and Karen Last Name: Dietz
      ii. Email Address: type Rick's email address, type Karen's email address
   b. Salutation: choose Hello John – the emails sent will include "Hello Rick and Karen"
   c. Category- choose if desired (not mandatory)
   d. Mortgage pre-approved – set flag to green if yes (not mandatory)
   e. Enable Reverse Prospecting – default is set to green (yes). Turn off if the Contact is not to be included (recommended when adding a Seller to the Contact List).
   f. Add Notes if desired. Example: this client was referred to by John Smith. The client is getting a mortgage from ABC lender. Max price is …. Location they will consider….
4. **SAVE**
5. **Text Messaging.** For the Contact to receive text messages from Matrix they must accept the terms and conditions. These steps must be followed.
   a. My Matrix – open Contacts
   b. Click the Contact(s) name
   c. Click "Sent Opt-In"
      i. NOTE: If you have multiple email addresses for your contacts only those that accept the terms will receive text.

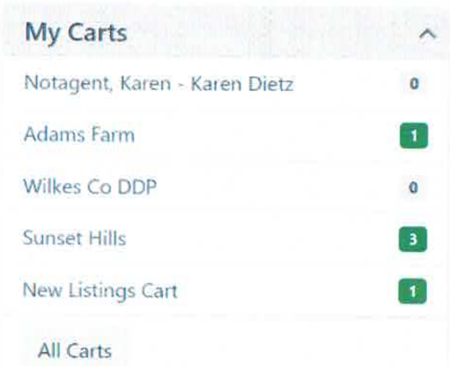
Carts

Carts can be created and named for any purpose. Listings can be placed in named Carts for monitoring purposes and future use.

From any performed Search

To Create and Name use New Cart.

To monitor and access all Carts use the Carts widget on the Matrix Home Page.



Options for Sending Listing Information to Clients

For listing information to be viewed by a client in their OneHome Portal, the client must be entered in Matrix as a Contact.

Select Listing(s) to Send

From an Agent Single Line Display or from the 360 Property report listing or listings can be checked (selected). With at least one listing checked (selected) the Action items become available. Use Email to email those selected listings. If the client has not been added as a Contact, use "Create a New Contact" or if the client is in Matrix already begin typing the name of the client, then select from the list.

BCC is a choice as well as sending a link via SMS text message.

Complete the mandatory Subject line. Complete the Email Body then Send.

Listing(s) will be viewed in OneHome when sent to a Contact.

Auto-Notifications: OneHome

Listings that match the client's search criteria can be sent upon completion of the search, followed by auto-notifications of new listings, price changes, and listings that come back on the market. The client must be in Matrix as a Contact to receive auto-notifications. Follow these steps:

1. Enter the client as a Contact.
2. Perform a Search based on the client's criteria.
3. View the matching results.
    a. If there are listings that are NOT to be sent, check the listing(s)

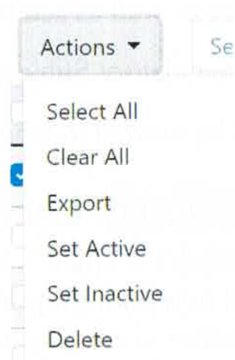
   b. Use the Action Item – Refine – then Discard.
   c. Select Action – to return to the list of properties that are to be sent.

4. Use Action Item – SAVE
5. Selecting New Auto Email
6. Select the Contact name.
7. Make the BCC and/or Text selection(s) if desired.
8. Subject line must be included.
9. Review the Welcome Email and Recurring Email (use the gear icon if modifications are desired to save these changes)
10. Settings
    a. Select Concierge ONLY if listing notifications are to be sent to you (the agent) first. If using Concierge, you (the agent) will select the properties that are to be discarded and those that are to be sent to your client.
    b. Schedule – select either
        i. ASAP – notices are sent as soon as possible.
        ii. Daily – sent on the days you choose.
11. SAVE

<u>To monitor and/or modify Auto-Emails:</u>

- Use My Matrix – Auto Emails
- Select from the list
    - Settings – allows to change the notification selections if needed.
    - Criteria- use to modify the search criteria.
    - Results – view all the matching properties.
    - Date Since and Market Update – view matching listings based on time selections
    - Open In OneHome – view the client's OneHome account. NOTE: this is view ONLY, as the agent cannot make any modification directly in the client's OneHome account.
    - Selecting (check) the Auto Email to either
        - Disable – stops auto-notifications but allows to reinstate if needed.
        - Delete – completely removes the auto-notifications but not the Contact from your Matrix account.

<u>To monitor/manage Contacts linked to Auto-Notifications</u>



- Use My Matrix – Contacts
- Click on a Contact
- Use Auto Emails to view all that client's information.
- Use Sent Emails to view email history
- To completely Remove a Contact
    - Select the Contact
    - Use Actions – (as seen right)

Customize Matrix Email Signature and OneHome Profile

Adding your Profile Photo in Matrix that feeds to OneHome

1. Add/Edit in the Responsive Menu Bar
2. Roster – Edit Existing
3. User information by Agent ID or Name
4. SEARCH
5. Select Photo
6. Browse to select – Add
7. Certify and Save

Customizing Your Matrix Account (includes information that is shared with OneHome)

From the Matrix home screen use the down arrow by your name then select "Settings". Use "My Information".

- ☐ Information Tab: complete any of the open text fields as desired then SAVE.
- ☐ Header/Footer: customize a Header that can be used when printing reports, included in the CMA Wizard, included in the Find Comparables CMA, and the *agent photo (if added) will become available for selection in the Email Signature and OneHome Agent Profile.*
- ☐ Email Signature: use the Image icon to upload a personal photo – be sure to have your curser exactly where the photo is to be located. Make the selections of font choices for the content. Use the "link" icon to add links including the choices of link types. Add symbols if desired. SAVE.
- ☐ OneHome: build your agent profile that can be viewed by your clients using OneHome. Upload a personal photo, add Contact Information, and Profile Content. SAVE.