

Your Buyer's Experience

Course Topics

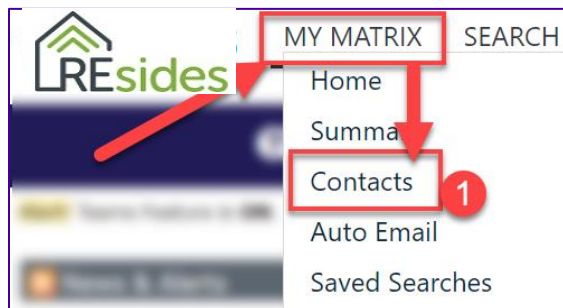
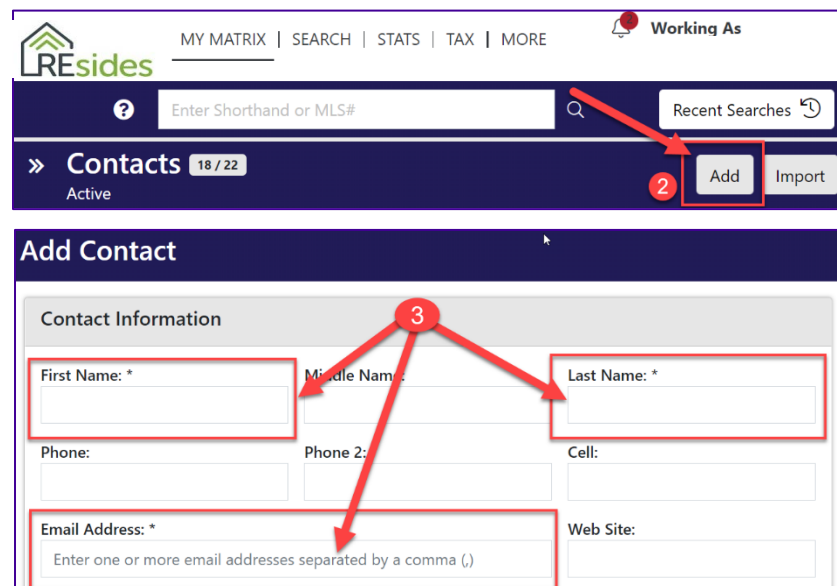
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Entering a Contact & Opt-in for Texts

TIP! Make sure to create a "Test" account with one of your PERSONAL email addresses; one not associated with your REsides account. This will give you the ability to experience the system for your clients perspective.

Adding a Contact

1. Go to My Matrix > Contacts
2. Click the "Add" button
3. Add as much info to the contact as possible *First Name/Last Name/Email Address is required.*

This screenshot shows the 'Add Contact' form in the REsides system. At the top, there is a navigation bar with 'MY MATRIX | SEARCH | STATS | TAX | MORE' and a 'Working As' dropdown. Below this is a search bar with the placeholder 'Enter Shorthand or MLS#' and a 'Recent Searches' link. The main header shows '» Contacts 18 / 22' and 'Active'. A red arrow points from the 'Add' button in the header to the 'Add Contact' form. The form itself has a title 'Add Contact' and a section 'Contact Information'. It contains several input fields: 'First Name: *', 'Middle Name:', 'Last Name: *', 'Phone:', 'Phone 2:', 'Cell:', 'Email Address: *', and 'Web Site:'. A red circle with the number '3' is placed over the 'First Name', 'Middle Name', and 'Last Name' fields, with red arrows pointing to each of them. Another red arrow points from the 'Email Address' field to the 'Web Site' field.

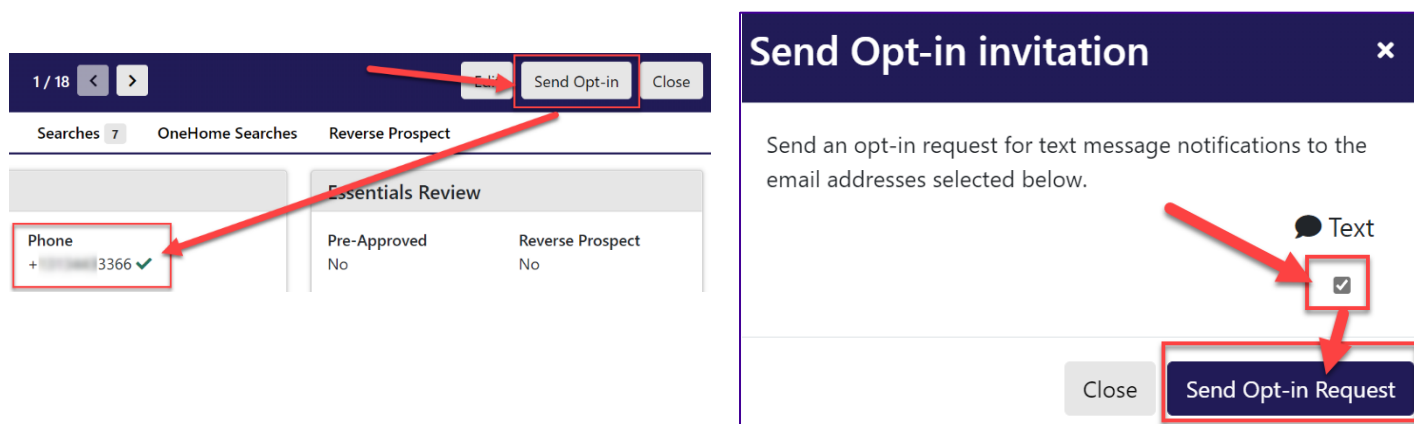
"Opt-In" Process for text messages

Your Buyer's Experience

If your buyer wants to get property updates via text (In addition to email) – they will have to opt in. After this process is completed, the buyer will get text messages AS WELL AS the email updates.

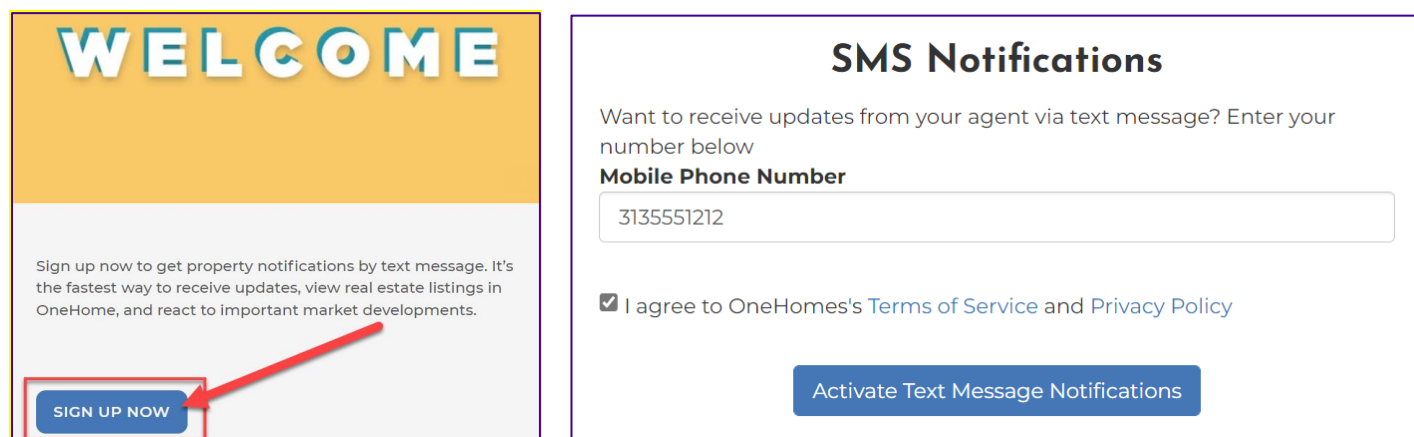
Click on the “Send Opt-in” button on the contact, and then check the box to email them the request.

(Note – Once they have opted in - the phone number will display a green checkmark.)



The screenshot shows the REsides interface. At the top, there's a navigation bar with '1 / 18' and navigation arrows. Below it, there's a 'Send Opt-in' button highlighted with a red box. An arrow points from this button to the 'Phone' field in the 'Essentials Review' section, which now displays a green checkmark. A modal window titled 'Send Opt-in invitation' is open, showing a 'Text' checkbox checked and a 'Send Opt-in Request' button highlighted with a red box.

When the buyer gets the email – they simply need to click on “Sign Up Now” and then enter whatever phone number they want to use.



The screenshot shows the 'WELCOME' email and the 'SMS Notifications' form. The email has a 'SIGN UP NOW' button highlighted with a red box. The form has a 'Mobile Phone Number' field with the number 3135551212 and an 'Activate Text Message Notifications' button.

Opt-In for Text Messages – Impact in Matrix

Your Buyer's Experience

Once they have opted in - the phone number will display a green checkmark.

Contact Information		
Title	Salutation	Phone
TESTER	Dear TESTER Billy Buyer,	3366 ✓
Email	Website	

When you set up an auto email, you can check the box to also send updates via text.

☒ Save a New Auto Email

☐ Recipients

Contact: ▼ [Create a New Contact](#)

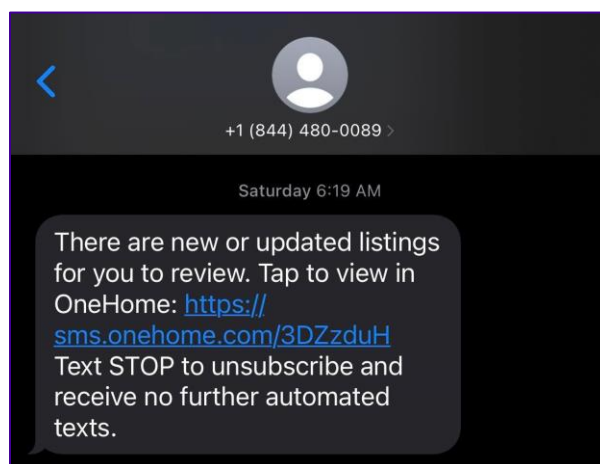
To: tester@gmail.com (Buyer, Billy)

CC:

☐ BCC me a copy of all emails

☐ Also send link via SMS text message

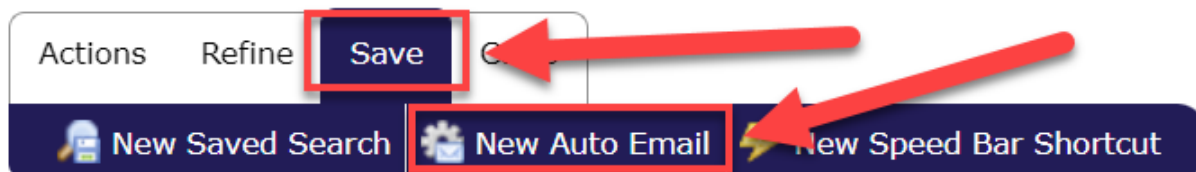
Your buyer will then get text messages in addition to the auto-emails.



Your Buyer's Experience

Setting Up an Auto Email

After completing a search in Matrix, click on the SAVE button below your search results. Then choose NEW AUTO EMAIL.



- **New Auto Email:** Set up an automatic email. Your customer will not only be emailed the initial search results but will also be sent updates when a new listing hits the market that matches their criteria.



Select your contact and choose whether or not you want to be BCC'd on the email. You also have the option to send a link via SMS text message. Enter a subject. For the welcome and recurring message, you are given default text, but are able to modify the text. The welcome text is what goes out with the first email. The recurring text goes out in subsequent emails. To set your custom text as a new default, click on the gear icon in the bottom corner of the text box.

Under the Settings section of the auto email wizard, if you select "Enable Concierge Mode", any listings will be sent to you first for approval. If this is not selected, the Schedule section will appear where you can select if you want emails to go out ASAP, Daily, or Monthly.

There are also display options to Enable as a Favorite Search on the Matrix Home Tab (if you want the search behind this email to appear on your home page Favorite Searches widget).

Here is where the SMS text message option is (If you have opted them in)

Contact: ▼ [Create a New Contact](#)

To:

CC:

☐ BCC me a copy of all emails

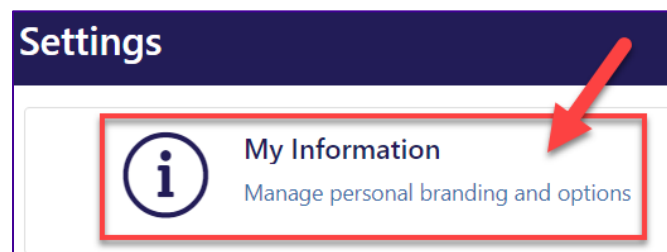
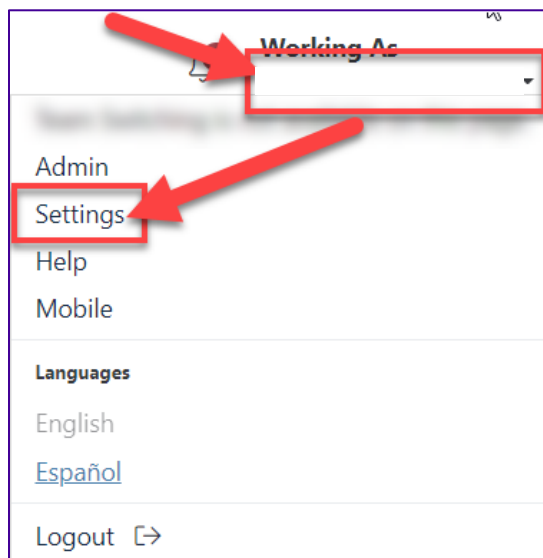
☐ Also send link via SMS text message

The OneHome Portal

Your Buyer's Experience

Did you set up your Agent Branding for OneHome?

From Matrix – Click on your name at the top right > Settings > My Information > Click on the OneHome Tab



Add your photo, social media links, a title, greeting, link out to a video, and more!

Note – the color scheme can be set up in the MLS-Touch mobile app.

The Welcome Email to OneHome

The Buyer's Experience

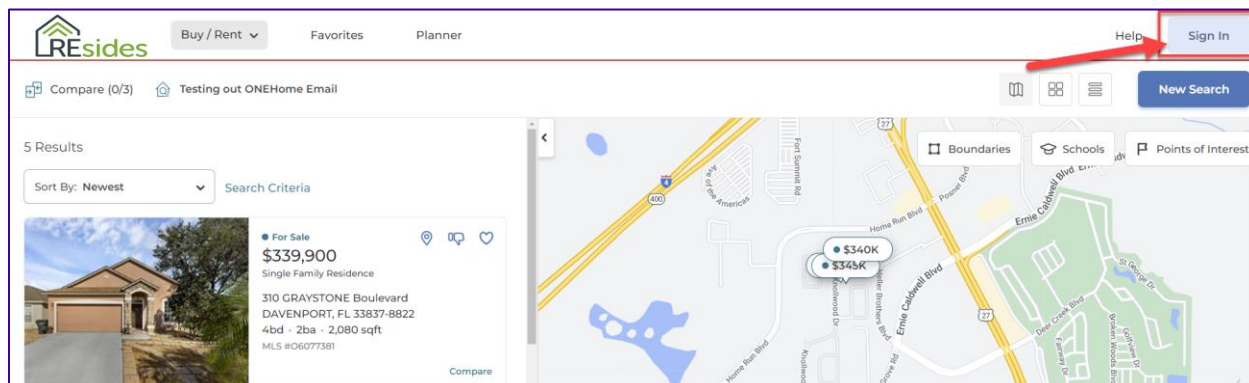
The initial email sent to your customer will be the WELCOME email that contains a short greeting.

When the buyer clicks “View Properties” at the bottom – they are taken to the OneHome Portal.

Going forward – in future emails they will just get the updated property information.

Your Buyer's Experience

When the buyer accesses the OneHome portal for the first time – they will be in “Read-Only” mode – they can review listings and look at pictures, listing data, etc.



However - If they want to keep anything (Favorites, Discards, Notes, Save a Search, etc. – the system will ask them to make an account – they only have to do this once!)

When the buyer creates a OneHome account – they can now do the following:

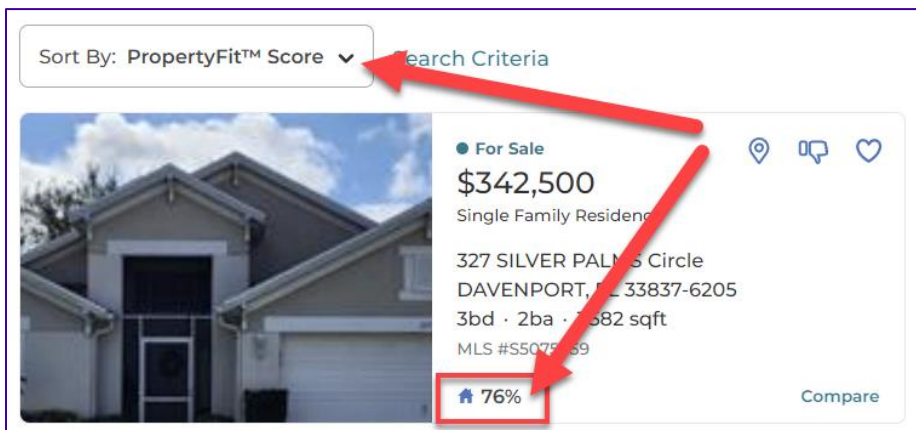
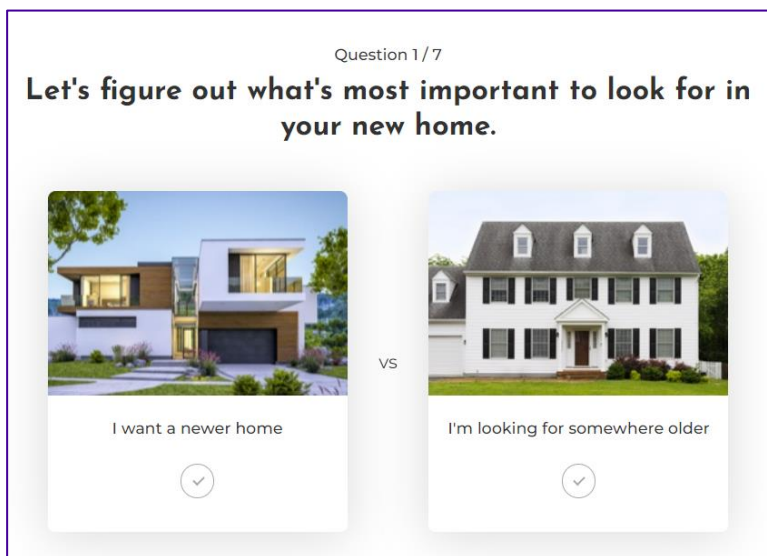
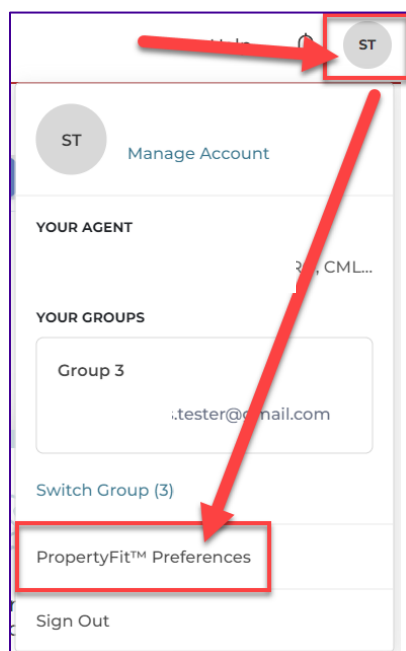
1. Mark a property as a favorite or discard
2. Requesting a tour on a listing
3. Add a note
4. Creating and saving a search in OneHome
5. Set up their PropertyFit and planner

Setting up the PropertyFit Preferences in OneHome

Your Buyer's Experience

PropertyFit allows a buyer to set further preferences that will allow them to sort properties based on a % (YOU can see this in Matrix as well!)

After creating an account, they can click their initials at the top right of OneHome and click on PropertyFit Preferences, answer a few easy questions, and then they will have the ability to sort the listings via the PropertyFit score!



Note – Initially, this is a one-time setup that will apply to future properties. However, the PropertyFit can be redone at any time in the future!

Setting up the PropertyFit Preferences in OneHome

Your Buyer's Experience



Buy / Rent ▾

Favorites

Planner

Get Ready 4/4

Browse Properties 4/4

Make an Offer 4/4

Close 4/4

BUYING MODE

SELLING MODE

Your agent's always got your back, but this planner will help you navigate the process too. Let's start with the basics.

YOUR TASKS

Get to Know the Process
COMPLETED

Know What You Can Afford
COMPLETED

Set Your Home Preferences
COMPLETED

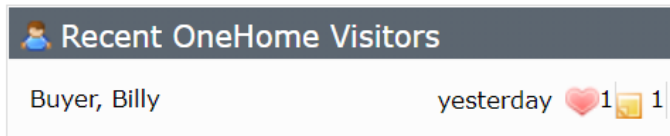
Sell Your Current Home (Optional)
COMPLETED

The Impact of the Buyer's actions in Matrix

Your Buyer's Experience

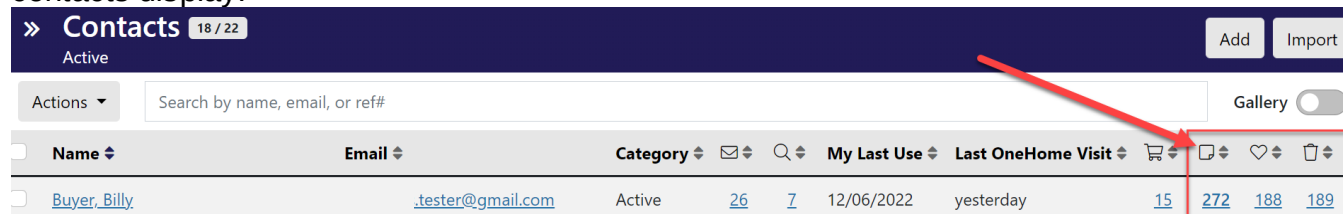
The Recent OneHome Visitors Widget

Now that the “Buyer” has created a OneHome account and taken action, this will now display on the widget.



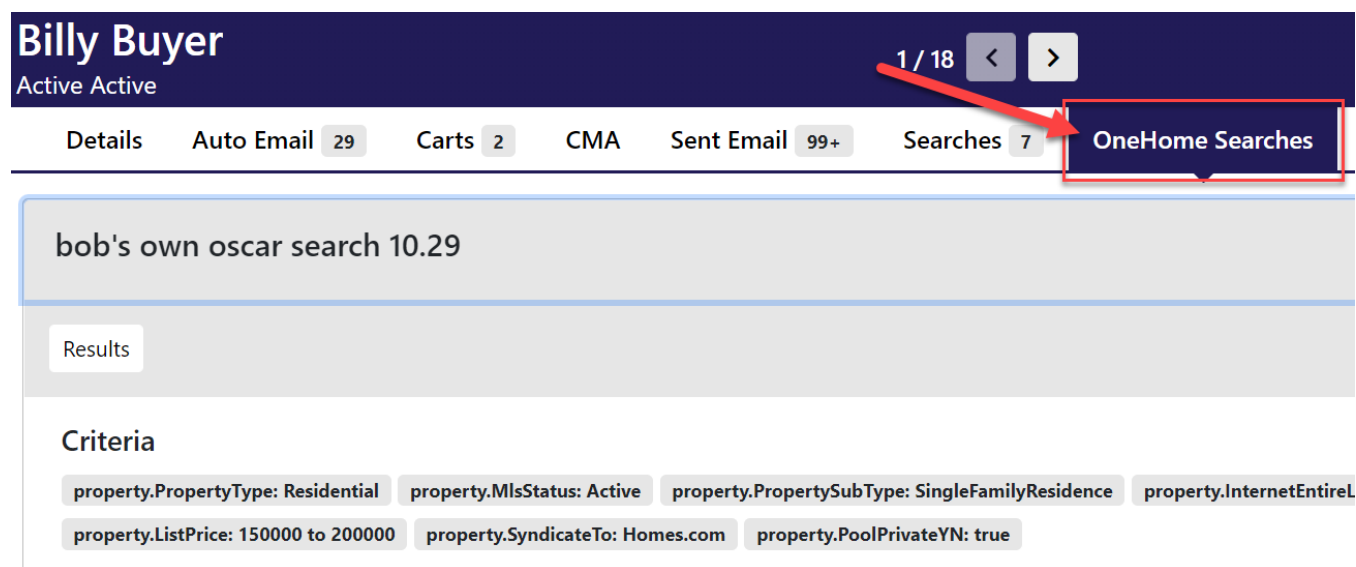
Returning to the Contact Record

The Last OneHome Visit date, Notes, Favorites, and Discards can also be found in the contacts display.



Name	Email	Category	My Last Use	Last OneHome Visit	Favorites	Discards
Buyer, Billy	.tester@gmail.com	Active	12/06/2022	yesterday	15	272 188 189

If you click on the contact’s name to open up the record, you can also see the OneHome Searches with the overview of the criteria that that Buyer is using on their own in OneHome.



Billy Buyer
Active Active

1 / 18 < >

Details Auto Email 29 Carts 2 CMA Sent Email 99+ Searches 7 **OneHome Searches**

bob's own oscar search 10.29

Results

Criteria

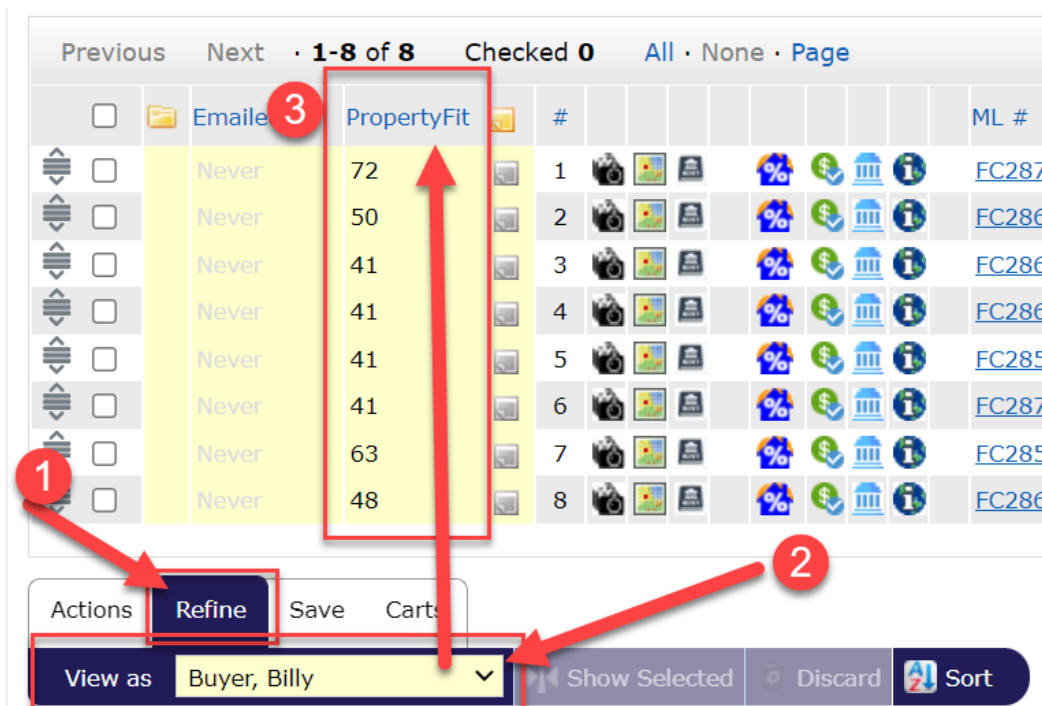
property.PropertyType: Residential property.MlsStatus: Active property.PropertySubType: SingleFamilyResidence property.InternetEntireL

property.ListPrice: 150000 to 200000 property.SyndicateTo: Homes.com property.PoolPrivateYN: true

The customer view in results to see PropertyFit

If the buyer has completed the PropertyFit questionnaire in OneHome, you can view this score on any further listing in Matrix. To access, run a search and then click on REFINE at the bottom of the search, and then click on the “View as” dropdown to select the specific buyer.

Your Buyer's Experience



Previous	Next	1-8 of 8	Checked 0	All	None	Page
☐	☐	Emails	PropertyFit	#		ML #
☐	☐	Never	72	1		FC287
☐	☐	Never	50	2		FC286
☐	☐	Never	41	3		FC286
☐	☐	Never	41	4		FC286
☐	☐	Never	41	5		FC285
☐	☐	Never	41	6		FC287
☐	☐	Never	63	7		FC285
☐	☐	Never	48	8		FC286

Actions **Refine** Save Carts
 View as Buyer, Billy

The OneHome “Preview” mode under the auto email settings

If the agent wants to see a read-only mode version of their buyer’s OneHome portal, they can access this by opening up the auto email under My Matrix > Auto Email and then clicking on the name of the Auto-Email.



Auto Emails (30) (i) Search

☐	Status	Subject	Contact Name
☐		new or updated properties for earl the squirrel	Buyer, Billy

[Settings](#) [Criteria](#) [Results](#) [Date Since](#) [Market Update](#) **Open in OneHome** [Delete Auto Email](#)

Portal Notification Settings

If the agent is interested in getting notified when their buyer(s) take certain action on the OneHome portal, they can configure Matrix to set up an Email, Text*, or Daily Report.

Your Buyer's Experience

Portal Activity Notification Settings

Use this page to control how and when you would like to be notified of activity performed by your contacts.
Daily Summary emails will run at 3am.

When a contact does this...	Notify me ASAP via Email	Notify me ASAP via Text	Notify me via Daily Summary Email
 Visits Portal	☐	☐	☐
 Saves a Favorite	☐	☐	☐
 Removes a Favorite	☐	☐	☐
 Discards a Listing	☐	☐	☐
 Un-discards a Listing	☐	☐	☐
 Adds Notes	☐	☐	☐
 Visits Portal First Time	☐	☐	☐

Note – These are GLOBAL settings for all of their customers. (This is not set up on an individual contact basis). If you would like to take advantage of the text option – you will need to add their provider and phone number below. Matrix will then text you a confirmation.

MLS Touch Mobile Apps

Does the agent have a buyer that has access to a smartphone or table? The agent can empower their buyer to interact with listings and do some of their own searching via the MLS-Touch app To start this process, you must install the MLS-Touch app from your Apple/Android app store and log in with the same credentials that you use when you access REsides.

Keep in mind, this is completely optional based on the customer's preferences.

Quick overview of the MLS Touch App

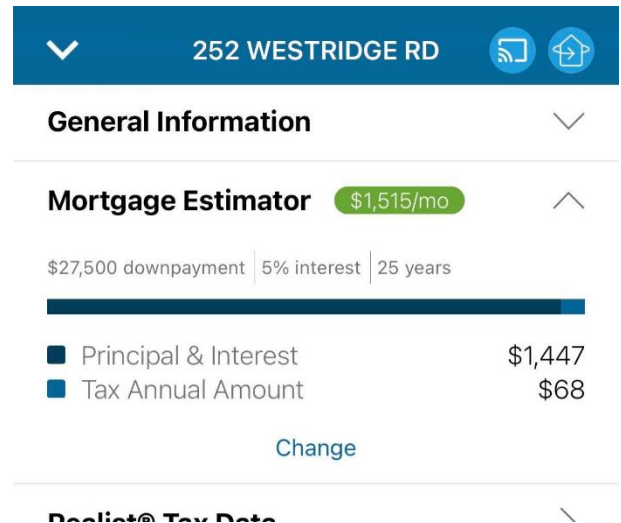
The MLS Touch app is not a replacement for Matrix, it is a mobile searching utility that syncs with Matrix.

Your Buyer's Experience

MLS TOUCH HIGHLIGHTS

MLS Touch - The Mortgage Estimator

One of the common questions you may get out in the field with a buyer is - “What will my payments be?” – and beyond the OneHome mortgage calculator (Covered earlier) – the app has a built-in mortgage calculator – located on every listing AND a “From Scratch” version located in the “More” hamburger menu at the bottom right of the app.



252 WESTRIDGE RD

General Information

Mortgage Estimator \$1,515/mo

\$27,500 downpayment | 5% interest | 25 years

■ Principal & Interest	\$1,447
■ Tax Annual Amount	\$68

[Change](#)

Realist@ Tax Data

If the agent is out in the field and ON SITE, they can utilize the “Instaview” to quickly pull up the listing and then access this built-in mortgage calculator.

MLS Touch - Brand and Share

The MLS Touch app can be branded and shared with the buyers that you are already working with, OR this can be shared to get new leads to work with!

To start – click on the hamburger menu at the bottom right of the app, and then tap on “Brand & Share”. There will be a short configuration sequence and then the agent can click on the “Share my app” button to see the sharing features – this can be shared via a Facebook post, email, or text! OR the agent’s link can be shared ANYWHERE a link can be posted (Website, email signature, Instagram, etc.).

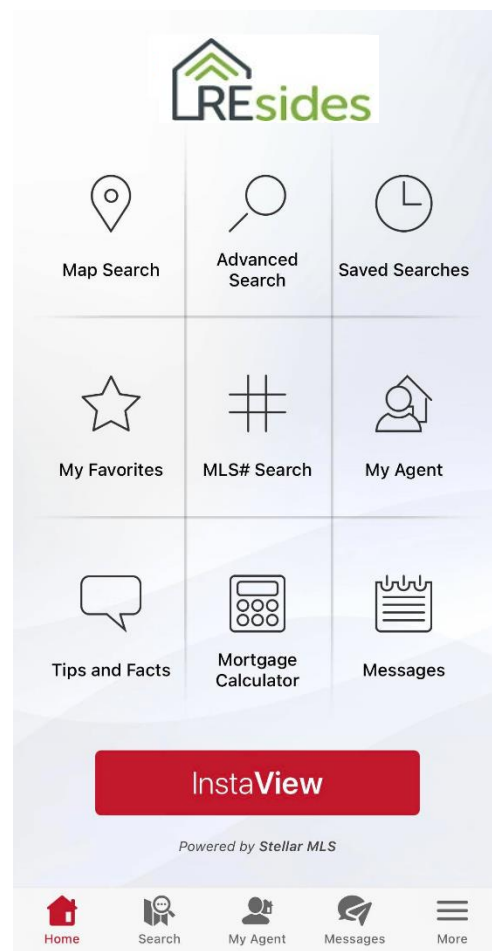
If someone taps on that link on their smartphone/tablet – they will be taken to their respective app store to download the MLS CLIENT app.

The Buyer's Experience

The MLS Client App

If a buyer installs the MLS Client app on their smartphone/tablet – they will be taken to the customer friendly version of the app, that is all branded for the agent! They can search, save searches, do their own mortgage calculations, and MORE! They can even communicate directly from their app to the agent via the messaging feature.

Note – just like OneHome, all of the Favorites/Discards/Notes, etc. will sync up with Matrix!



Your Buyer's Experience

The Cloud CMA Buyer Tour

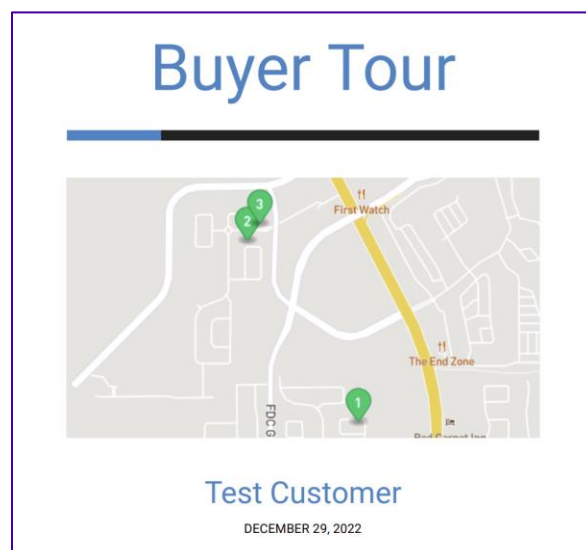
NOTE – If you have never accessed CLOUD CMA before – there is a short registration process the first time you go in.

Did you know that Cloud CMA does more than just CMA's? A neat feature that you can utilize with your buyers is the BUYER TOUR in Cloud CMA.

Based on the MLS Listings YOU select, the Buyer Tour Includes the following*:

- *A map of all the listings*
- *Your agent resume and contact info*
- *Listing info and photos*
- *A place for the buyer to add comments*
- *Area Schools*
- *Area Restaurants*
- *Several short guides to help them!*
- *Client Testimonials*

(Note - *This report can be customized – Make sure to edit the custom pages ahead of time – this must only be done once)



The Buyer's Experience

Starting with search results, simply select the listing you wish to be included (or use the select all checkbox) > Click on Cloud CMA below in the action bar

Previous Next · 1-8 of 8 Checked 8 All · None · Page

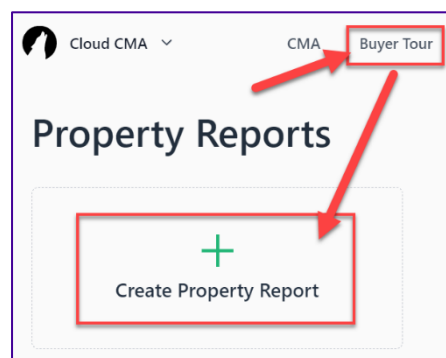
	ML #	Status	Address	City
☒	FC287034	ACT	3 ZEPHYR LILY PL	PALM COAST
☒	FC286979	ACT	14 ZOLLINGER PL	PALM COAST
☒	FC286665	ACT	26 ZEOLITE PL	PALM COAST
☒	FC286622	ACT	17 SLOWDRIFT TURN	PALM COAST
☒	FC285743	ACT	9 ZOLLINGER PL	PALM COAST
☒	FC287778	ACT	7 ZENOBLE PL	PALM COAST
☒	FC285589	ACT	37 SQUASH BLOSSOM TRL	PALM COAST
☒	FC286805	ACT	113 KARAS TRAIL	PALM COAST

Actions Refine Save Carts

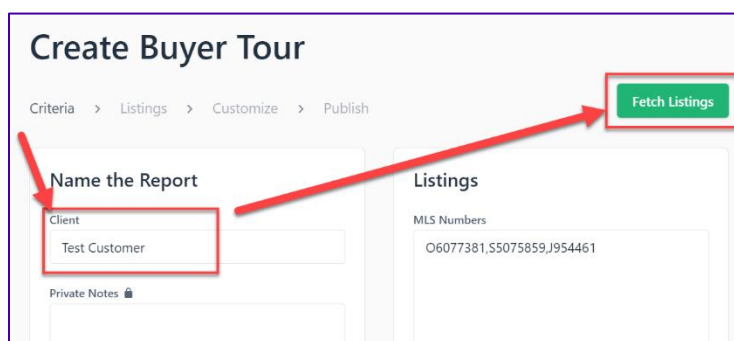
Criteria Email Print CMA Directions Stats Export Quick CMA **Cloud CMA**

The Buyer's Experience

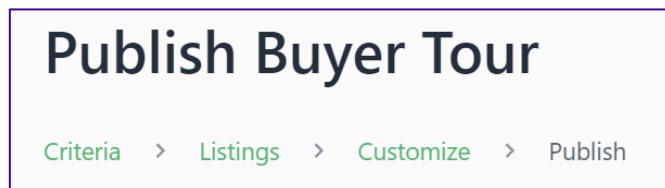
When you enter Cloud CMA – Click on Buyer Tour at the top



Enter the customer's name – notice on the right the MLS ID's have been brought over



Click on "Fetch Listings"



Follow the wizard to create/publish the Buyer Tour!