

## Course Topics

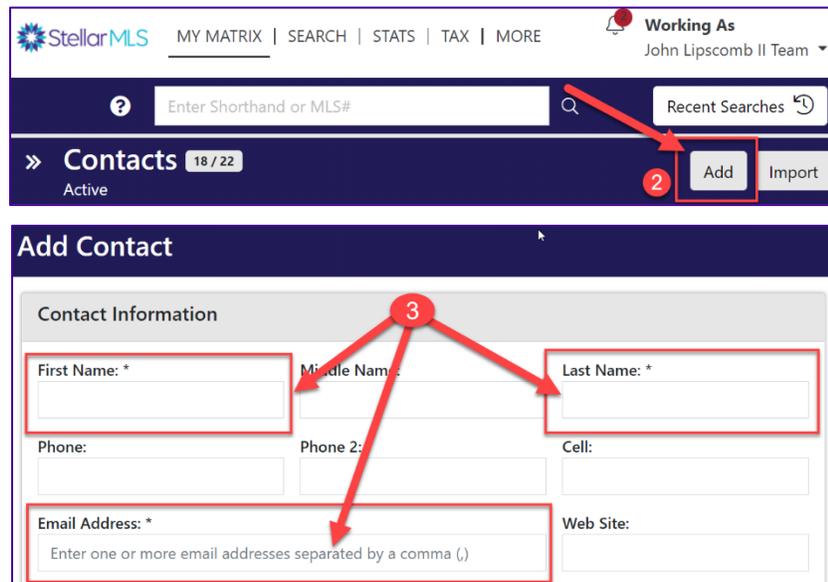
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## Entering a Contact & Opt-in for Texts

TIP! Make sure to create a “Test” account with one of your PERSONAL emails! This will give you the ability to test anything in Matrix! This also keeps you in your buyer’s headspace with what they see!

### 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.*

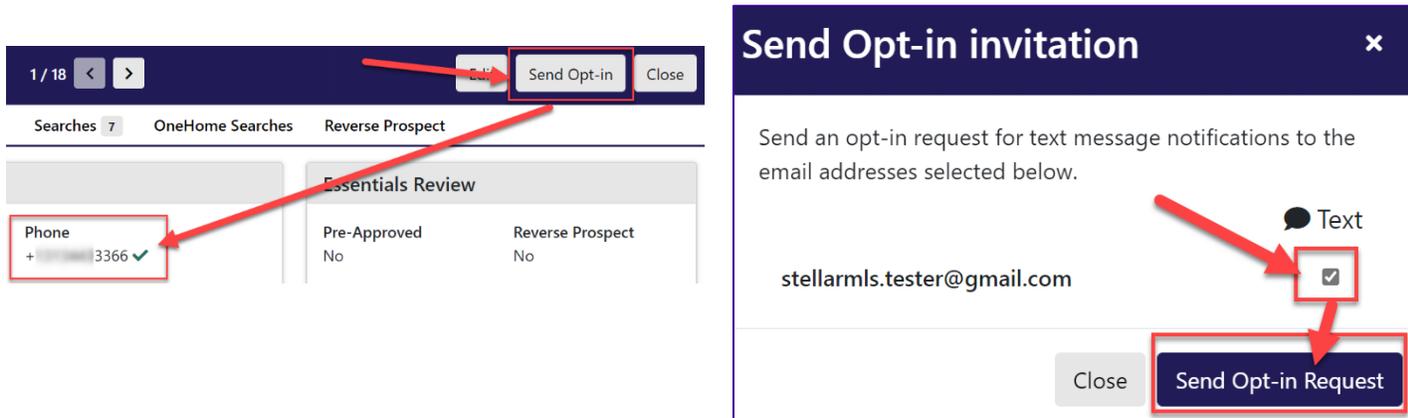


### “Opt-In” Process for text messages

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.

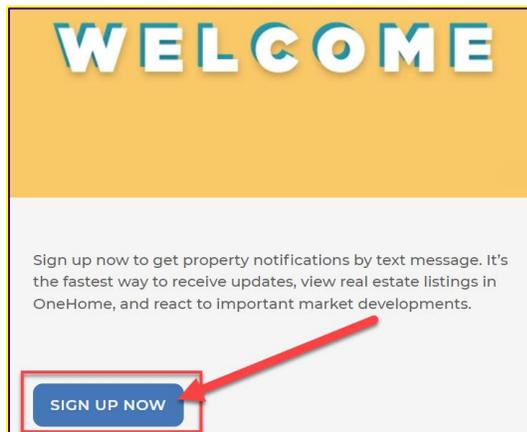
Click on the “Send Opt-in” button on the contact, and then check the box to email them the request.

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

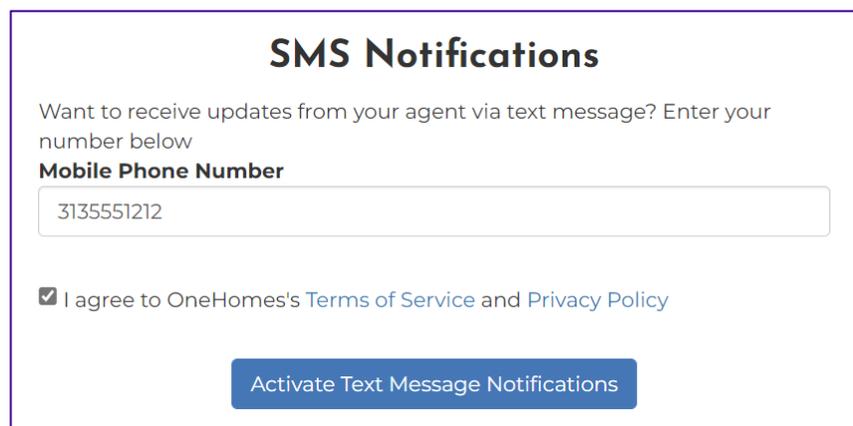


The screenshot shows the StellarMLS interface. At the top, there are navigation buttons and a 'Send Opt-in' button highlighted with a red box and arrow. Below, there are tabs for 'Searches 7', 'OneHome Searches', and 'Reverse Prospect'. A contact card is visible with a 'Phone' field containing '+ 3366' and a green checkmark. To the right, an 'Essentials Review' section shows 'Pre-Approved' and 'Reverse Prospect' both set to 'No'. A modal window titled 'Send Opt-in invitation' is open, showing the text 'Send an opt-in request for text message notifications to the email addresses selected below.' and the email address 'stellarmls.test@gmail.com'. A 'Text' checkbox is checked, and a 'Send Opt-in Request' button is highlighted with a red box and arrow.

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 top part of an email. The word 'WELCOME' is written in large, bold, white letters on a yellow background. Below this, on a white background, is the text: 'Sign up now to get property notifications by text message. It's the fastest way to receive updates, view real estate listings in OneHome, and react to important market developments.' At the bottom, there is a blue button with the text 'SIGN UP NOW' in white, which is highlighted with a red box and arrow.



The screenshot shows a form titled 'SMS Notifications'. The text reads: 'Want to receive updates from your agent via text message? Enter your number below'. Below this is a text input field containing the number '3135551212'. Underneath the input field is a checked checkbox with the text 'I agree to OneHomes's Terms of Service and Privacy Policy'. At the bottom of the form is a blue button with the text 'Activate Text Message Notifications'.

## Opt-In for Text Messages – Impact in Matrix

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

Contact Information		
Title TESTER	Salutation Dear TESTER Billy Buyer,	Phone [REDACTED] 3366 ✓
Email <a href="mailto:stellarms.test@gmail.com">stellarms.test@gmail.com</a>	Website <a href="http://www.stellarms.com">www.stellarms.com</a>	Stellar MLS Senior Trainer

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: [REDACTED] [Create a New Contact](#)

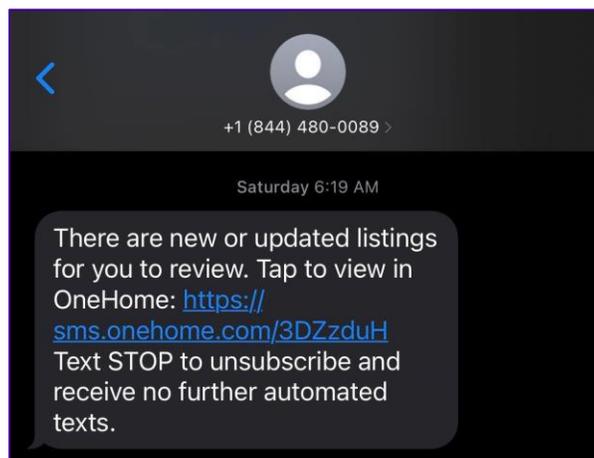
To: stellarms.test@gmail.com (Buyer, Billy)

CC: [REDACTED]

BCC me a copy of all emails

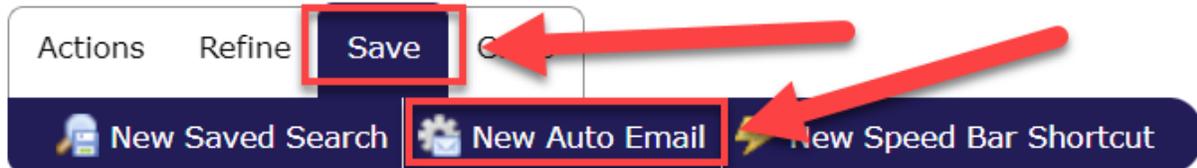
Also send link via SMS text message

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



## 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: [Redacted] ▼ [Create a New Contact](#)

To:

CC:

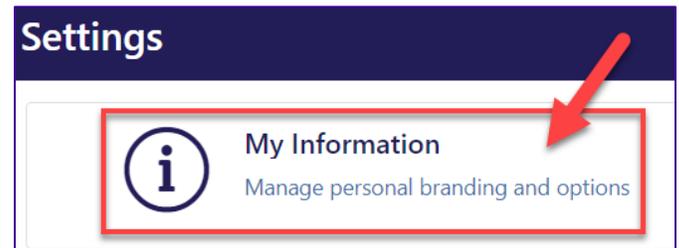
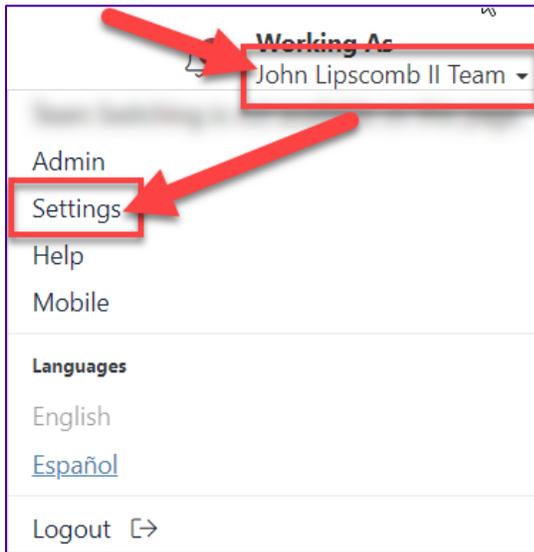
BCC me a copy of all emails

Also send link via SMS text message

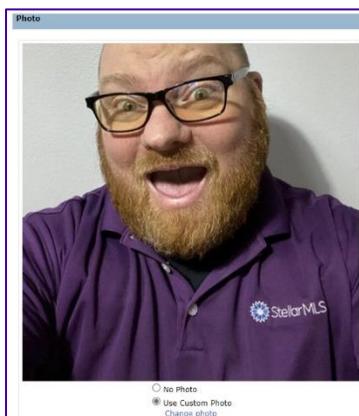
## The OneHome Portal

## 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!



Contact Information:	
OneHome Full Name:	JOHNNY Lipscomb - E-PRO, CMLX1
OneHome Team Name:	John
OneHome Team License Number:	
OneHome Phone:	407-960-5300
OneHome Office Name:	STELLAR MLS
OneHome Email:	John.Lipscomb@stellarmls.com
OneHome Twitter Link:	<a href="https://twitter.com/stellarmls">https://twitter.com/stellarmls</a>
OneHome Facebook Link:	<a href="https://www.facebook.com/StellarMLS/">https://www.facebook.com/StellarMLS/</a>
OneHome Instagram Link:	<a href="https://www.instagram.com/stellarmls/">https://www.instagram.com/stellarmls/</a>
OneHome License Number:	123456
OneHome Tag Line:	Stay Stellar!
OneHome Office Address:	
OneHome Office Phone:	407-960-5300
OneHome Office Fax:	407-960-5450
OneHome Fax:	407-960-5450
OneHome Agent Web URL:	<a href="https://www.stellarmls.com">https://www.stellarmls.com</a>
Profile Content	
Title:	Hello everyone!
	Hello everyone!
	Please let me know if you have any questions!



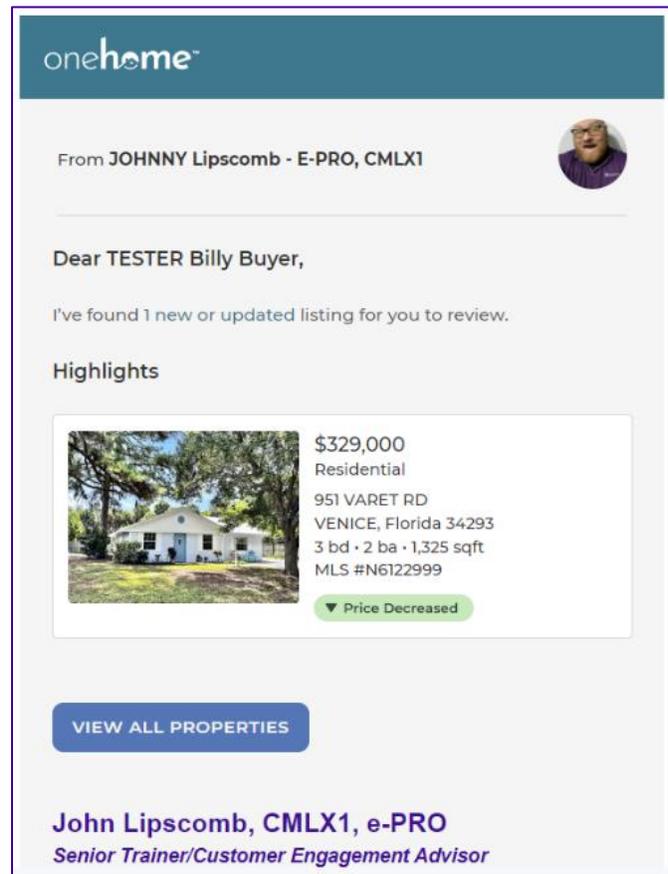
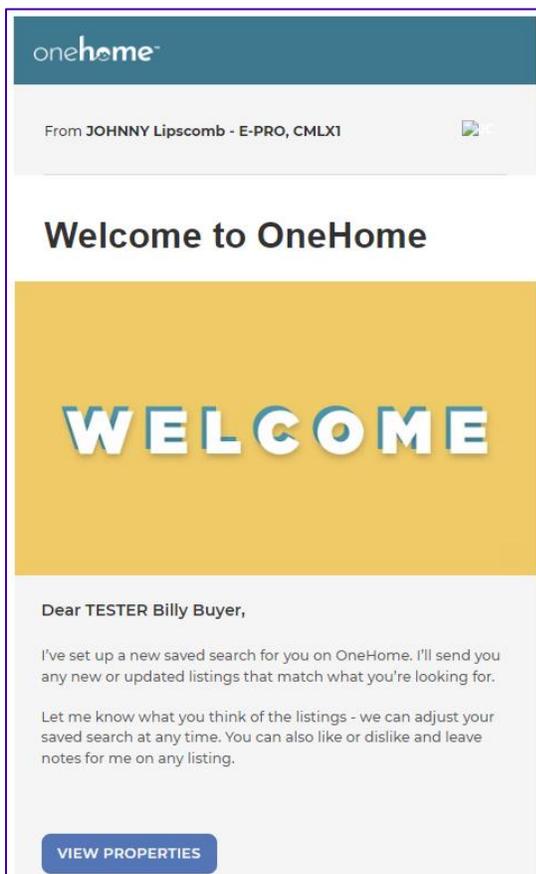
Note – the color scheme can be set up in the MLS-Touch mobile app or Prospects CRM.

## The Welcome Email to OneHome

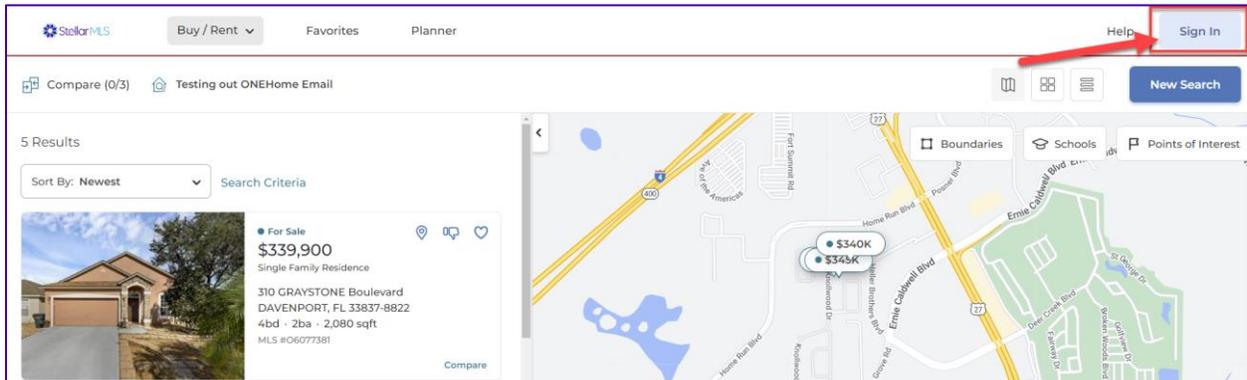
The initial email sent to your customer will be the WELCOME email that contains a short greeting.

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.



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!)**

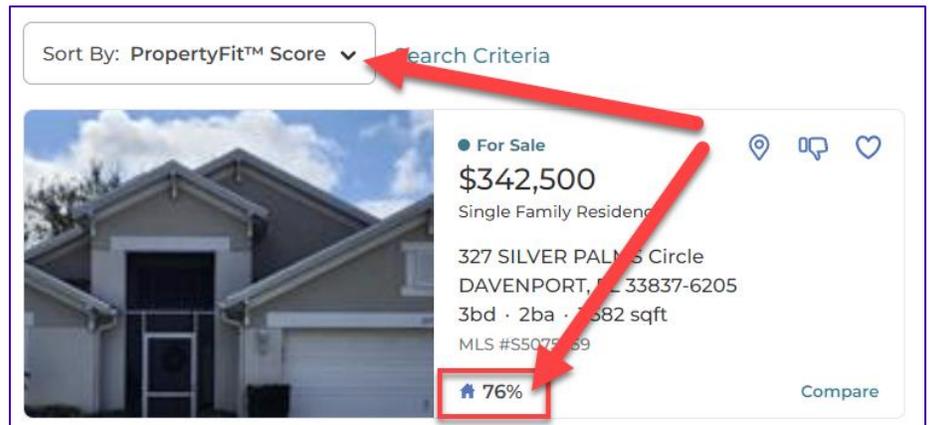
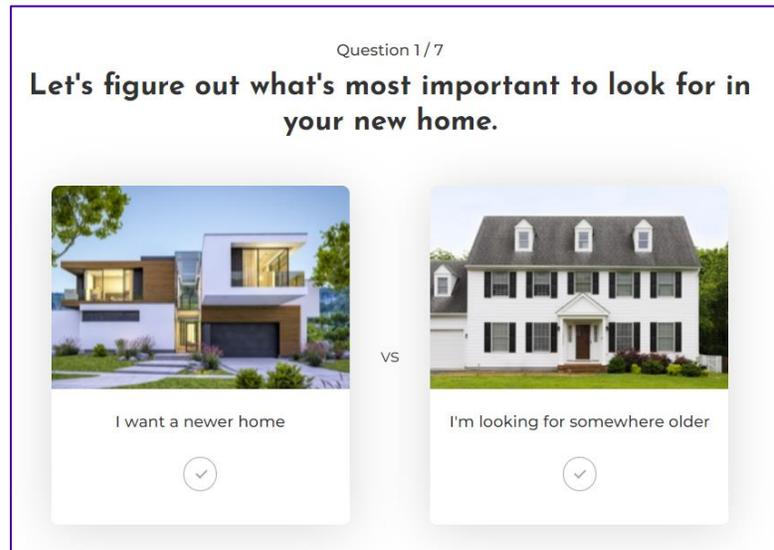
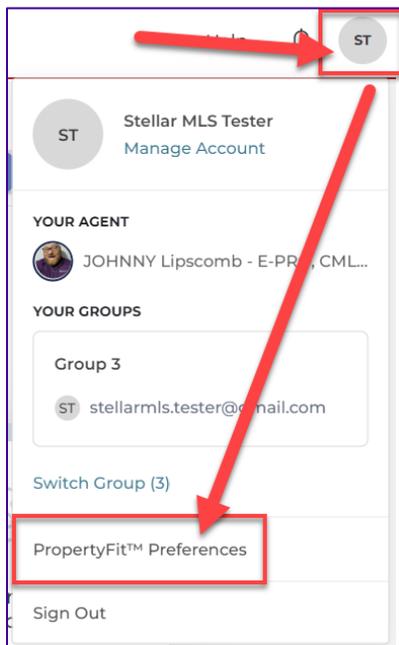
**When the buyer creates a OneHome account – they can now do the following:**

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

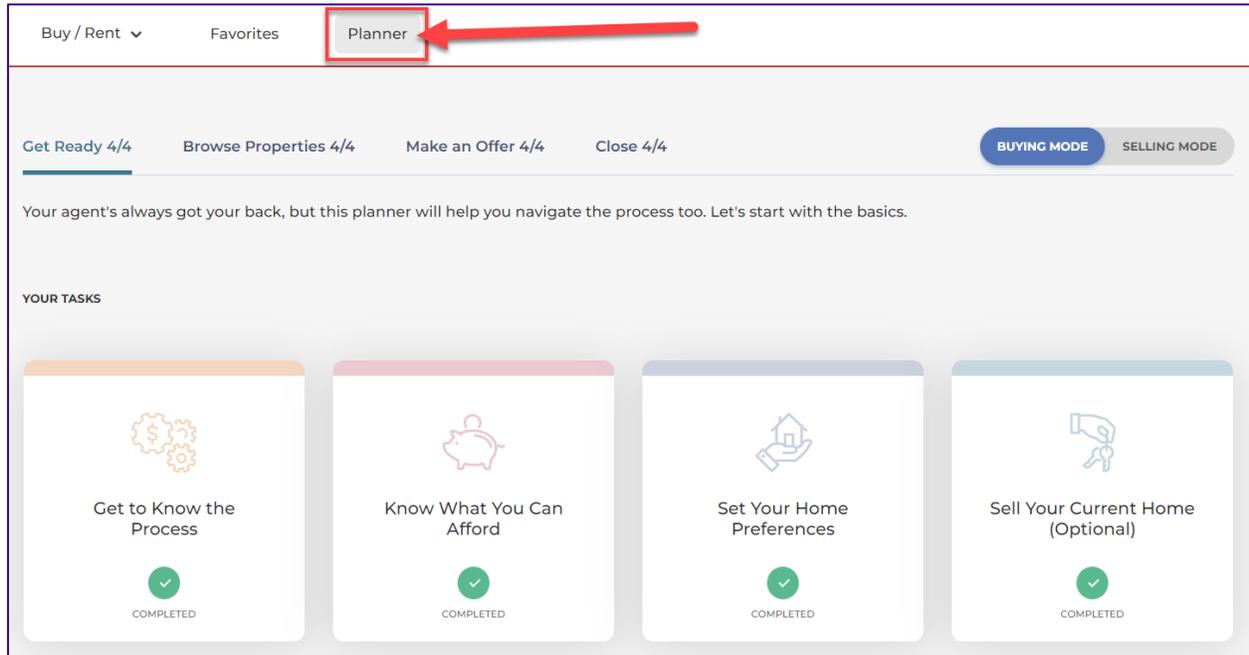
*PropertyFit allows a buyer to set further preferences that will allow them to sort properties based on a % (YOU can see this in Matrix as well!)*

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



The screenshot shows the StellarMLS Planner interface. At the top, there are navigation options: "Buy / Rent", "Favorites", and "Planner". The "Planner" option is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, there are progress indicators for four stages: "Get Ready 4/4", "Browse Properties 4/4", "Make an Offer 4/4", and "Close 4/4". To the right of these indicators are two buttons: "BUYING MODE" (active) and "SELLING MODE". Below the progress indicators, there is a message: "Your agent's always got your back, but this planner will help you navigate the process too. Let's start with the basics." Underneath this message is the heading "YOUR TASKS" followed by four task cards, each with a green checkmark and the word "COMPLETED":

- Get to Know the Process
- Know What You Can Afford
- Set Your Home Preferences
- Sell Your Current Home (Optional)

## The Impact of the Buyer's actions in Matrix

## The Recent OneHome Visitors Widget

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

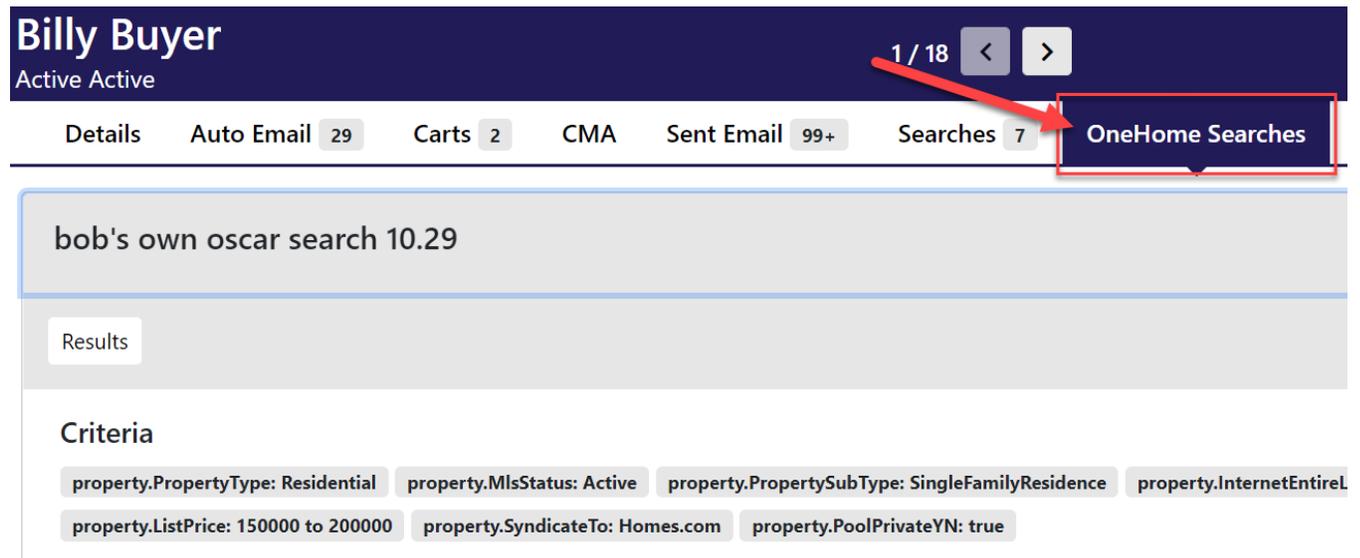


## Returning to the Contact Record

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

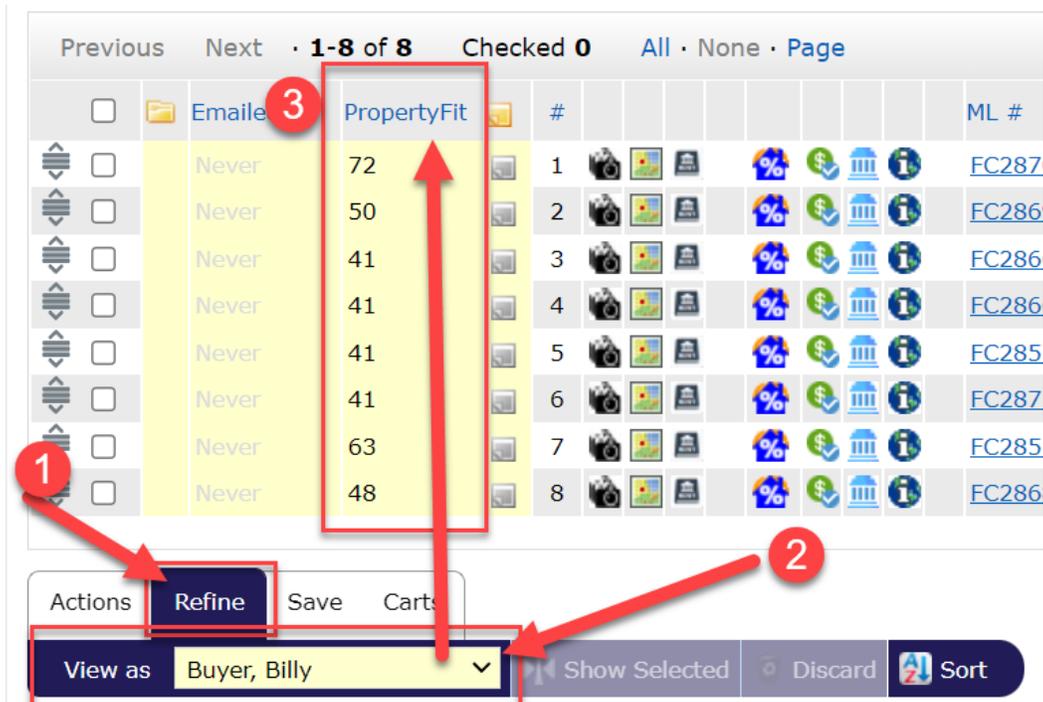


If you click on the contact's name to open up the record, you can also see the OneHome Searches with the overview of the criteria that that Buyer is using on their own in OneHome.



## 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.



Previous	Next	1-8 of 8	Checked 0	All	None	Page				
<input type="checkbox"/>	Envelope	PropertyFit	#			ML #				
<input type="checkbox"/>	Never	72	1							FC287
<input type="checkbox"/>	Never	50	2							FC286
<input type="checkbox"/>	Never	41	3							FC286
<input type="checkbox"/>	Never	41	4							FC286
<input type="checkbox"/>	Never	41	5							FC285
<input type="checkbox"/>	Never	41	6							FC287
<input type="checkbox"/>	Never	63	7							FC285
<input type="checkbox"/>	Never	48	8							FC286

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

<input type="checkbox"/>	Status	Subject	Contact Name
<input type="checkbox"/>		new or updated properties for earl the squirrel	Buyer, Billy

### 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.

## 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 <b>Email</b>	Notify me ASAP via <b>Text</b>	Notify me via <b>Daily Summary Email</b>
 Visits Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Saves a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Removes a Favorite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Discards a Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Un-discards a Listing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Adds Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Visits Portal First Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**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 and MLS Client 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-Client 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 they use when they access the MLS.

Keep in mind, this is completely optional based on the customer's tech savviness!

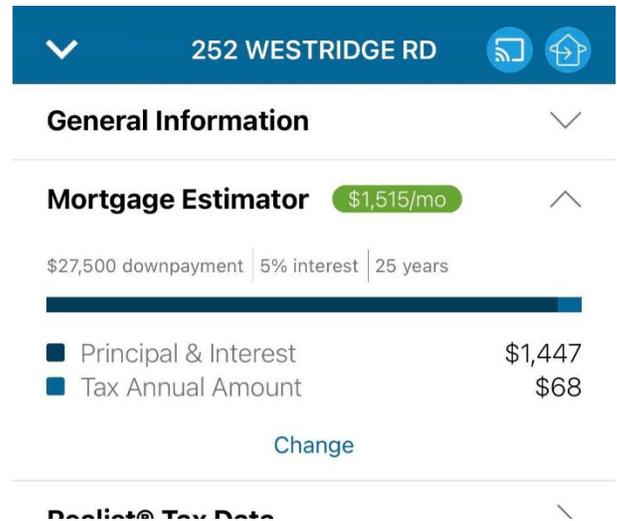
### **Quick overview of the MLS Touch App**

*The MLS Touch app is not a replacement for Matrix, it is a mobile searching utility that syncs with both Matrix and Prospects CRM*

## 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.



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!

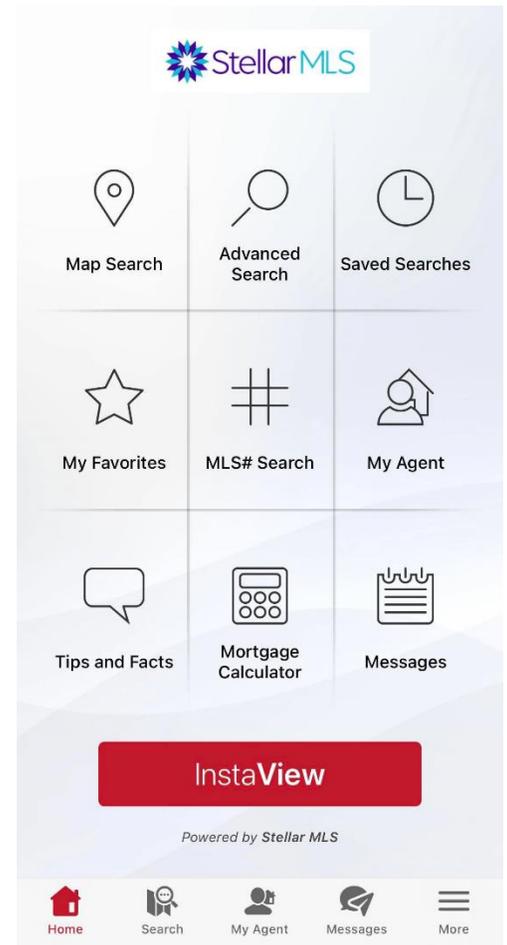
To start – click on the hamburger menu at the bottom right of the app, and then tap on "Brand & Share". There will be a short configuration sequence and then the agent can click on the "Share my app" button to see the sharing features – this can be shared via a Facebook post, email, or text! OR the agent's 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 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!*



## The Cloud CMA Buyer Tour

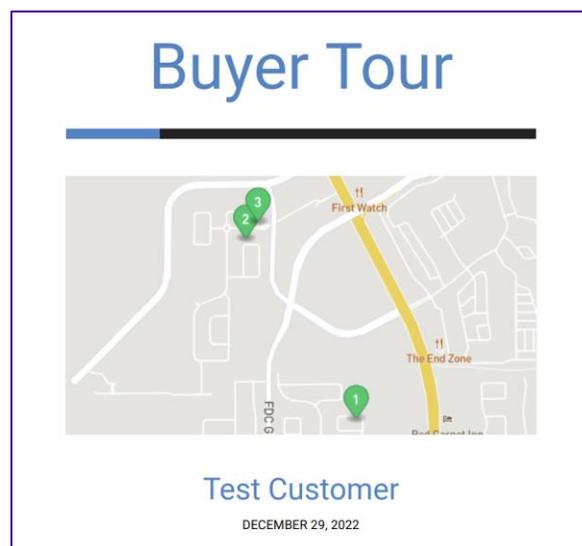
*NOTE – If you have never accessed CLOUD CMA before – there is a short registration process the first time you go in.*

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.

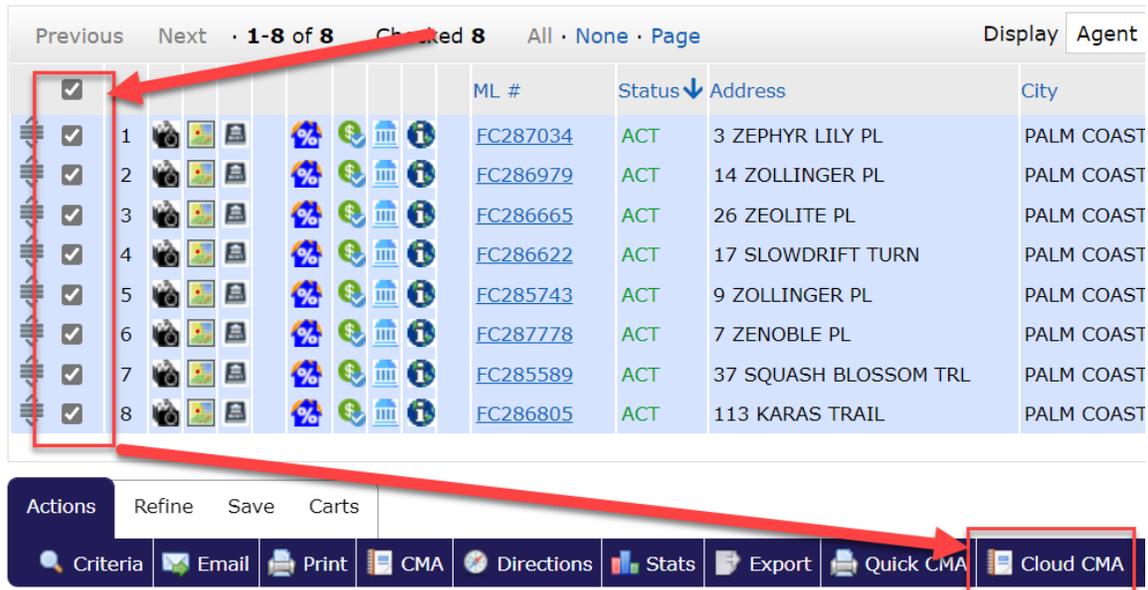
**Based on the MLS Listings YOU select, the Buyer Tour Includes the following\*:**

- ***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)***



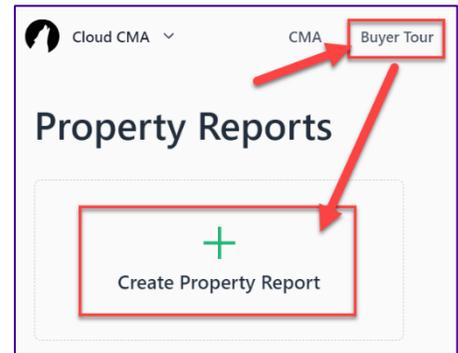
Starting with search results, simply select the listing you wish to be included (or use the select all checkbox) > Click on Cloud CMA below in the action bar



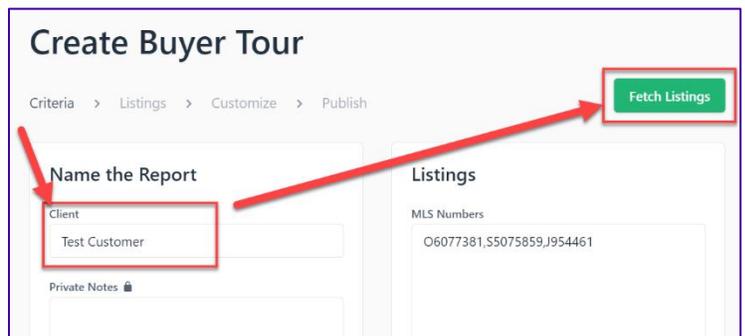
The screenshot displays a search results interface. At the top, navigation links include 'Previous', 'Next', '1-8 of 8', 'Checked 8', 'All', 'None', and 'Page'. On the right, there are 'Display' and 'Agent' options. The main table lists 8 properties, each with a row of icons and a checkbox. A red box highlights the first column of checkboxes, and a red arrow points from this box to the 'Cloud CMA' button in the action bar below. The action bar includes buttons for 'Criteria', 'Email', 'Print', 'CMA', 'Directions', 'Stats', 'Export', 'Quick CMA', and 'Cloud CMA'. The 'Cloud CMA' button is highlighted with a red box.

	ML #	Status	Address	City
<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/>	1	ACT	3 ZEPHYR LILY PL	PALM COAST
<input checked="" type="checkbox"/>	2	ACT	14 ZOLLINGER PL	PALM COAST
<input checked="" type="checkbox"/>	3	ACT	26 ZEOLITE PL	PALM COAST
<input checked="" type="checkbox"/>	4	ACT	17 SLOWDRIFT TURN	PALM COAST
<input checked="" type="checkbox"/>	5	ACT	9 ZOLLINGER PL	PALM COAST
<input checked="" type="checkbox"/>	6	ACT	7 ZENOBLE PL	PALM COAST
<input checked="" type="checkbox"/>	7	ACT	37 SQUASH BLOSSOM TRL	PALM COAST
<input checked="" type="checkbox"/>	8	ACT	113 KARAS TRAIL	PALM COAST

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!