



## Activating OneHome

Question	Answer
How do clients get into the OneHome portal?	OneHome is invitation only: as the agent, you connect consumers to OneHome by emailing or texting them listings.
How does my client activate their OneHome account?	The "View Properties" link in the email will take them to the OneHome site. Then they can click on the "Activate Account" button at the top right of the screen.
Why should my client activate/create a OneHome account?	An account allows the consumer full use of OneHome's features. Through activating their account, they will be able to interact with you: they can "favorite" properties, save searches, leave you notes, provide their availability times to look at specific properties, etc.
Can clients see the listings I send without activating a OneHome account?	Yes, but they will not have full access to OneHome's interactive functionalities.
If my client chooses to view listings via auto email only (and not activate an account), which features of OneHome can they still use?	They can view maps, photos, and info such as schools, drive time, & points of interest. Without an account, they will not be able to use the interactive features of OneHome or "talk back" to you.
How can my client receive text messages via One Home?	You may be proactive and send an opt-in request from their client card prior to a client activating their account. Or, they may opt in once they activate their account.
Does my client need to answer all those criteria questions? What if they want to view a larger selection?	The additional prompts (such as property fit) are optional: they DON'T affect the types of properties the client can view. They DO help to show how closely a property matches the client's criteria.

## OneHome Client Portal

Question	Answer
My client was working with a different REALTOR® before me. What happens when they change to a new REALTOR®?	If the former REALTOR® removes them as a contact, when the client tries to log in, they may get a message telling them that they don't have access to OneHome any longer. The good news is: since they already have a OneHome account, you (their new agent) just need to add them as a contact and send them listings. Then, they can sign in, switch to you as their new agent, and use OneHome.
How long are favorited properties available to view? If the status of the property changes, will it be updated on OneHome?	Favorited properties stay just as before. If the property status changes, OneHome will reflect that: it is essentially Matrix in real time.
Are we able to set the "available times" for tour requests in our Client's OneHome Portal?	No, those are the set times OneHome offers for your client to choose when they are available to look at the property. You may use that information to request a Showing from the listing agent.
What happened to properties marked as "POSSIBILITIES?" My existing clients were using those.	They can see these under favorites.
Can COMING SOON properties be shared on OneHome?	Yes. "Coming Soon" properties will display in OneHome. <i>*Note: While there is no search filter for "Coming Soon" in the Client Portal, properties may still appear in search results.</i>
I have two clients looking for a property together. Will they see each other's favorites?	Both clients will see the same properties under favorites, but their individual notes and property fit scores will be different.

<b>What does it mean when my client clicks on the highlights listing in the auto email and sees “This property is no longer available?”</b>	The selected “highlight” property is no longer on the Market or no longer matches the search criteria the agent set. They can still view other properties that match the criteria you’ve sent them.
<b>If a property is listed as No Longer Available, how will a client know if it is WITHDRAWN vs EXPIRED vs TEMPORARILY WITHDRAWN?</b>	They need to confirm with you.
<b>Can clients choose their display format? For example, single line, or client summary to see a quick overview of all properties including remarks?</b>	No. OneHome displays a consistent format for all.
<b>Will FS and LH be criteria they can select along with price, bedroom, sq ft etc. in a search?</b>	No. Clients cannot search for this themselves, but as the agent, you can add that criteria for their auto email through Matrix.

### OneHome Text Message Notifications

Question	Answer
<b>If a client contact has 2 emails and only 1 cell for texting, is that ok? Do both addresses have to opt in separately even though it's the same cell phone number?</b>	Yes. Both email addresses need to opt-in to receive text messages. They can both use the same number for receiving texts so that only one person receives the automated listing notifications.
<b>If my client gets a listing via text and texts back with a question, can I see it?</b>	No. OneHome uses a generic number to text, so you will only see client questions if they text to your personal number or message you within OneHome.
<b>If I send the auto email notification by text, can the client also access OneHome via desktop? Or do I have to email it to them as well?</b>	They will receive both text & email. They can also log into OneHome.com without an email link if they've already created an account.
<b>If the initial search is sent to both text and email, will all future auto emails be sent to both text and email also?</b>	This is a new feature, so be sure to turn on the SMS text option. To be clear: clients will be able to get emails only, or emails and text, but <b>NOT</b> text alone.
<b>Is the "Send opt in request" only for permission to send my client text message alerts? Do I need to send it if they just want to get emails?</b>	The “send opt-in request” button is to invite your clients to automated listing text alerts. Auto Email activation works just as before where the client needs to click the link in the email you sent with properties to activate the auto email feature and receive future property updates.
<b>Can clients set up their own search on the text message feature or does it only send automatic search emails saved by agents?</b>	No. They can only receive automated listing alerts for properties that you have set up for them.
<b>If both clients put in the same phone number for texts, will that number receive notices twice?</b>	Yes

### Miscellaneous

Question	Answer
<b>What will happen with the personalized headers?</b>	They are only available for print purposes. They were not used by the majority of agents and are not ADA compliant.
<b>How does OneHome compare to other CRMs like BoomTown or Salesforce? Why would agents use OneHome instead of other systems?</b>	OneHome is not really a CRM; it's more of a listing portal. The goal is to ensure good communication between you and your clients and strengthen your relationship throughout the home buying/selling process.
<b>Is OneHome a nationwide platform?</b>	Yes, but your clients can only see listings from your MLS.