



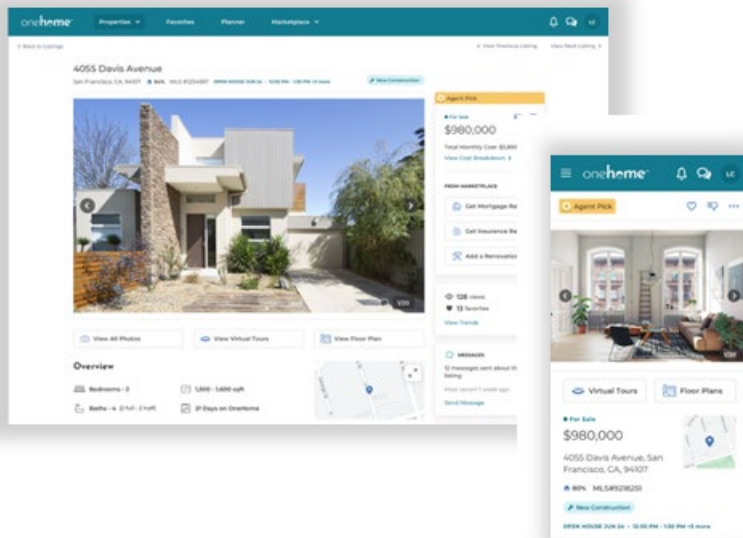
## Quick Tips: Preparing for OneHome

### What is OneHome?

**OneHome™ by CoreLogic® is the new client portal for Matrix™** that helps you collaborate with clients and remain at the center of their home search.

Available to your clients by invitation only, OneHome provides access to rich property data, neighborhood insights, location scores, school boundaries, and more. It also helps rank listings by suitability to provide clients with a better search experience, illuminating client behavior so you can better understand their priorities.

Best of all, you manage and respond to everything for OneHome directly within Matrix. Your clients collaborate with you through your OneHome portal connected to your Matrix account.



## Prior to Launch

### Brush up on your OneHome knowledge

Familiarize yourself with the new OneHome portal *before* clients begin asking questions. Here's where to get more information prior to launch:

- Matrix Learning Lab—now available on the Matrix Home Page
  - Video tutorials
  - FAQs
  - Tips
  - User guides



### Build excitement with your clients!

Be proactive by telling your clients about the new OneHome portal *before* the launch date. Key points to convey:

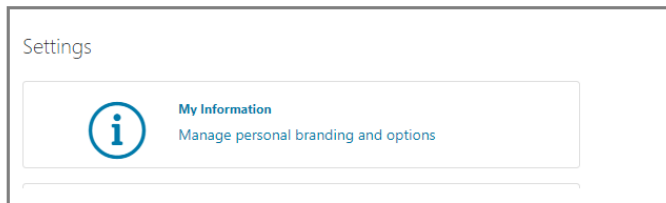
- **What is OneHome?** OneHome is the new client portal attached to Matrix. Available to clients by invitation only, OneHome provides access to listings, PropertyFit™ scores, Planner, collaboration tools, community insights, school information, and more.
- **OneHome is web-based** with a mobile-first responsive design that automatically resizes to any device. OneHome can be accessed conveniently with any major Internet browser available on your device (it's not an app that needs to be downloaded).
- **OneHome is free:** By default, clients can view properties on OneHome without having to activate an account. However, activating an account is free and provides clients access to additional, password-protected, features.

# Launch Day

## IMPORTANT! Update your contact information and branding in Matrix

From the Matrix Utility Menu, access your Settings > My Information page, then select the OneHome tab to ensure that your OneHome agent photo and branding information is up to date. It will be used for:

- All outgoing email notifications
- Your OneHome welcome message
- Your OneHome contact card and agent profile page



Information Header & Footer CMA Cover Sheet Email Signature **OneHome**

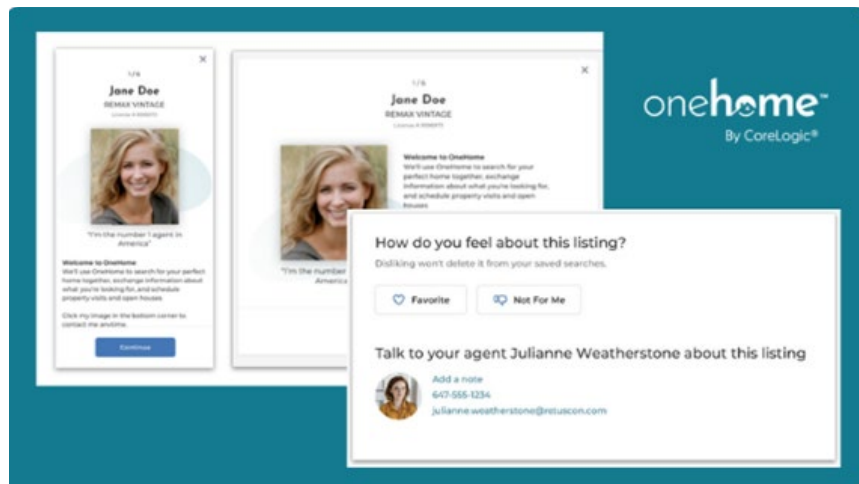
Your OneHome portal will include the photo and contact information shown below.

**Photo**

No Photo  
 Use Custom Photo  
Upload photo

**Contact Information:**

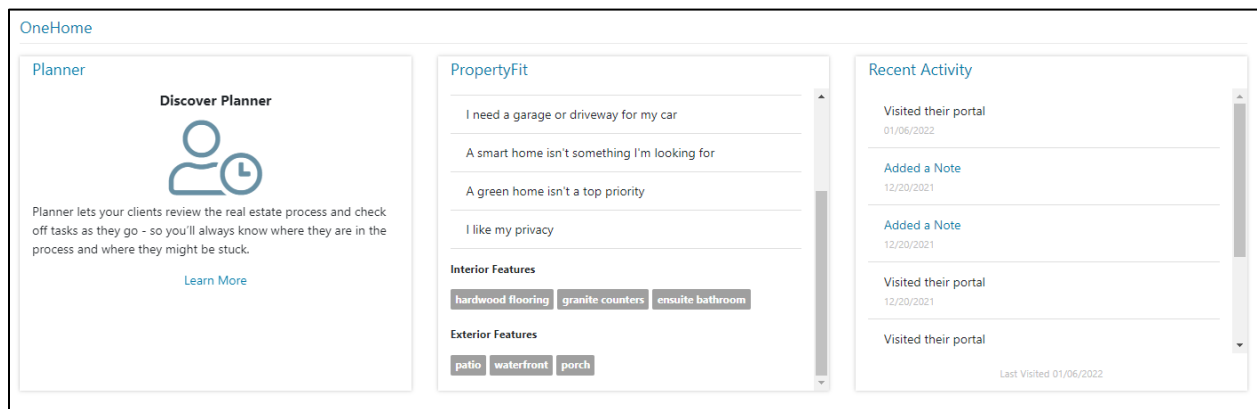
OneHome Full Name: \_\_\_\_\_  
OneHome Team Name: \_\_\_\_\_  
OneHome Phone: \_\_\_\_\_  
OneHome Office Name: \_\_\_\_\_  
OneHome Email: \_\_\_\_\_  
OneHome Twitter Link: \_\_\_\_\_  
OneHome Facebook Link: \_\_\_\_\_  
OneHome Instagram Link: \_\_\_\_\_  
OneHome License Number: \_\_\_\_\_



## Familiarize yourself with the new Contacts section in Matrix

While there *has* been an update to the Contact section’s user interface, the content in this area remains mostly unchanged. Two new panels have been added under the “Details” tab—giving you further insight into your client’s actions within OneHome:

- **Discover Planner:** Planner lets your clients review the real estate process and check off tasks as they go - so you’ll always know where they are in the process and where they might be stuck.
- **PropertyFit:** Your clients can see how closely a property matches what they’re looking for at-a-glance. Get your clients using PropertyFit to find the right home even faster.



## How to review the properties sent from Matrix to your clients in OneHome

If you’ve BCC’d yourself on a client’s email notification, you have two options to view the sent listings.

- **View in OneHome:** If you click the “View Properties” button in the BCC email, you’ll be taken to your client’s OneHome portal in “Agent Preview mode”—allowing you to *only view* these specific properties. As an agent, you cannot log into your client’s OneHome account—you are simply just viewing OneHome exactly as your client sees it.
- **View in Matrix:** If you click the “View listings in Matrix” link in the BCC email, you’ll be taken to Matrix—allowing you to view *all* sent properties, add to, and review, property notes, review any custom searches created by the client, review client-favorited or discarded properties, as well as review all additional client actions within OneHome.