



# Welcome to ROAM Matrix

A collection of To Do items to help get you set up quickly and efficiently.



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# Welcome to ROAM!

We know changing to a new system is never easy. To make the transition smoother, we have put together some information. Some are setup-oriented and have “To-Do’s” associated with them. There is a section on some data changes that occurred as well.

## CONVERSION TIMELINE

What will convert and what will not? Below is a list of items that will and will not convert

Will Convert
Listing Data
Listing Photos up to 100
Supplements/Documents
Saved Searches
Contacts
Open House Data
Agent Photos

Will Not Convert
CMAs
Custom Reports
Custom Grids
IDX Setup
Vanity Domain Setup
Personal Information for Reports/Websites
Email Signature
Incomplete Listings

Even though some items are being converted, there may be some changes that you will need to make to your settings in Matrix. Below are “To Do’s” for you to setup and make your transition easier.

If an item is not being converted, it does not mean the feature is not available in Matrix.

As stated above, below is information about various features in Matrix. It goes over the items mentioned above as well as other features. Read through it so you are aware of how things work and what you need to do to make the transition as smooth as possible.



## CONTACTS

Your Contacts will be updated at the beginning and end of parallel.

If you edit the Contact in ROAM during the parallel period, that particular Contact will not be updated again. It will be assumed that the data in ROAM is up-to-date and should not be overwritten

## COMPARE CONTACTS

To Do: Compare the contacts in GCLRA and in ROAM.

- Hover over My Matrix and click on My Contacts to view your Contacts. This will show you the number of contacts in that MLS. (You will need to do this in both GCLRA & ROAM to compare the contacts).
- Check the contacts for correct information in the ROAM MLS. (Example: email addresses).

## SAVED SEARCHES

Your Saved Searches will be converted at the beginning of parallel. If you do not edit them in ROAM Matrix, they will be updated, if needed, at cutover. Any new Saved Searches added in GCLRA during the parallel period will be added to Matrix at cutover.

Your Auto-E-mails are imported as Saved Searches, but they are not 'turned on' to send emails to your customers. You will need to do this manually. Instructions for this are further down in this document.

If you edit Saved Searches in Matrix during the parallel period, that particular Saved Search will not be updated at cutover. It will be assumed that the data in ROAM Matrix is up-to-date and should not be overwritten by what is in GCLRA Matrix

All saved searches that have been imported are marked with (Imported). The searches where all search criteria could not be converted are marked with (ImportedSS\*). It is recommended to check each of your Saved Searches to see if you need to modify the criteria. Data is stored in ROAM Matrix in a slightly different manner and there may be different options available to you for searching. Also, some fields were moved or removed from the system which would cause your Saved Search to have (ImportedSS\*).

Any search that was used for an auto-email will be marked with (ImportedAE). You will need to enable these as auto-emails. See the auto-email section for more on how to do this.

## EDIT SAVED SEARCHES

To Do: Edit Saved Searches - It is recommended to check each of your Saved Searches to see if you need to modify the criteria.

- Hover over My Matrix and click on Saved Searches to view your Saved Searches.
- Click on the arrow to the left of the Saved Search name. The Criteria is shown below the option buttons.
- Click on Criteria to go to the Search screen if you need to modify.
- Click on Save after you've made any modifications.

## SET UP MY FAVORITE SEARCHES

**To Do:** Set up My Favorite Searches – My Favorite Searches appears on the Home page of Matrix. You can enable up to 10 searches to appear on the Home page.

- Hover over My Matrix and click on Saved Searches to view your Saved Searches.
- Click on the arrow to the left of the Saved Search name.
- Click on Settings.
- Check the box to Enable as Favorite Search on Home tab.
- Click on Save.

## PERSONAL/MARKETING INFORMATION

The information from your membership system will be in the listings in the system. The settings below will not change how information will appear in a listing. Contact your Association if you need to change your information as it appears in your listings.

Some features in this document will use personal information that is in the system for marketing purposes. For instance, it personalizes your headers or footers on reports. This personal information is not part of your Association's membership system.

Before you start using Matrix, enter all of your personal information first. This will make it so other features will properly work when you turn them on.

## SET UP EMAIL SIGNATURES

**To Do: Email Signature** – Set this up so you can turn on Auto-Emails and use other email functions.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **Email Signature** tab.
- Edit how you want your signature to appear and click on **Save**.

You can only insert photos for your signature that are used with your Print Header, CMA Cover Page or OneHome Portal Greeting.

## SET UP MY INFORMATION

**To Do: Information** – This section contains information used on the OneHome Portal, in print headers and footers as well as other areas of Matrix. You can override what is in your membership system for cell phone. However, it is highly recommended to contact your MLS to change your membership information at the source for those pieces of information.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **Information** tab.
- Edit the various pieces of information and click on **Save**.

## SET UP HEADER & FOOTER

**To Do: Header & Footer** – This is the header and footer that can appear when printing Reports.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **Header & Footer** tab.
- If you want to use one of the templates provided, click on a banner image/theme.
- Choose a theme then Click on **Preview**.
- Upload a Photo of yourself, if desired.
- Click on **Save**.
- **OPTIONAL** - If you want to create a Custom Header/Footer
  - Click on any banner image/theme
  - Click on **upload custom banner image**.
  - Click on **Browse**.
  - Upload images choose sizing and coloring as desired.
  - Click on **Save**.

Note: For best results, the optimum image size for an agent photo is 100 x 100 pixels and the header/footer banner is 946 x 120 pixels.

## SET UP ONEHOME

**To Do: OneHome Portal Information** – This is used with your OneHome Portal. The information available includes the items you edited above on the **Information** page. If you do not see many items to choose from, you may need to first edit them on the **Information** page.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **OneHome** tab.
- Modify information as needed.
- Click on **Save**.

Note: For best results, the optimum image size for a portal photo is 500 x 500 pixels

## SETUP CMA COVER SHEET

**To Do: CMA Cover Sheet** – This is used with your CMA and allows you to enter extra contact information just for a CMA. The photo for the CMA Cover Sheet can be a picture of a house or something real estate related. It is not intended for it to be a photo of you, but it can be if desired.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings, My Information**. Select the **CMA Cover Sheet** tab
- Modify information as needed.
- Click on **Save**.

## AUTO-EMAILS

Your Auto-Emails have been imported as Saved Searches but need to be manually activated. Any search that was used for an auto-email will have a plus sign at the beginning of the name (**ImportedAE\***).

If you need help with your Saved Searches, please see the Searching section, further below in this document, for tips.

It is recommended for you to do the following before enabling any auto-emails:

- Watch the **OneHome Walkthrough** video (hyperlink below). This is a tour of the features available in the OneHome Portal. <https://youtu.be/9C0jLXt3g64>
- Tell your customers the MLS system is changing so they will be aware of the change in the look and feel of the information they will see and receive. Include the link to the **OneHome Walkthrough** video above. This will help them understand the changes.
- Personalize your OneHome Portal Information by configuring your Header/Footer options, your Email Signature, your Welcome Letter that is sent when auto-emails are activated,

**When you turn on an Auto-Email in ROAM Matrix you should turn it off in your GCLRA, so your customer does not receive two emails from you.**

## ENABLE AUTO-EMAILS

**To Do: Enable Auto-Emails** – Follow the steps below to setup auto-email for your customers and clients.

- Make sure you have reviewed your **Contacts** as indicated previously.
- Make sure you have reviewed your **Saved Searches** as indicated previously.
- Make sure you have set up your **Email Signature** as indicated previously.
- Hover over **My Matrix**, then click on **Saved Searches** to view your Saved Searches.
- Click on the **arrow** to the left of the Saved Search name.
- Click on **Settings**.
- Click on the link at the top that says **Turn this Saved Search into an Auto Email**. If you have not yet selected a contact for the auto-email, you will be required to do so.
- Edit the information for the Auto-Email.
  - If you choose Daily as the option for sending, there is an AM and a PM option. The AM emails are sent at 6:00 a.m. The PM emails are sent at 6:00 p.m.
- Click on **Save**.

Note: A maximum of 400 records are returned with a search associated with Auto-Emails. Please make sure the Saved Searches that are enabled do not return more than 400 listings. If the search returns over 400 listings, you will be prompted to edit the Saved Search criteria.

Once an Auto-Email is setup, the email will be sent to your customer. The status of your Auto-Email will be one of the following:

- ☐ Auto Email is Active, but the Contact has not yet accessed the results.
- ☒ Auto Email is Active and has been accessed by the Client.



❗ Auto Email is disabled by client or agent.

A customer can unsubscribe from just one email, or from all emails from one agent. If your customer is not receiving an email, make sure they did not unsubscribe from your emails.

If an auto-email has been setup and it returns zero listings for 90+ days, it will be disabled by the system. Also, if an auto-email is not opened by your client, it will be disabled after 30 days.

## REVIEW LISTINGS

**NOTE:** GCLRA Incomplete listings will not be brought over to ROAM at cutover.

### REVIEW LISTINGS

To Do: Check your listings for accuracy and that they are in the ROAM Matrix.

GCLRA listing statuses were converted to the following ROAM Matrix statuses.

GCLRA		ROAM
Active	→	Active
Active/Contingent	→	Active Under Contract Contingency Type – Open Predication
Active/Pending Continue to Show	→	Active Under Contract
Pending	→	Pending
Expired	→	Expired
Sold	→	Closed
Leased	→	Closed
Withdrawn	→	Withdrawn
Hold	→	Withdrawn

**NOTE: Withdrawn status has changed. Canceled will now be used for all terminated listings agreements.**

**Withdrawn** listings will be for all HOLD listings or listings withdrawn by the listing broker before the expiration of the listing agreement. Example: Seller requests the listing broker to remove the property from the market but the broker does not agree to terminate or cancel the listing agreement.

**Canceled** listings will be for all terminated listings. Example: Seller and listing broker agree to end the listing agreement prior to the expiration and take a listing off the market.



## CUSTOM REPORTS WILL NOT CONVERT

Your Custom Reports in will not be converted to ROAM Matrix.

## CUSTOM DISPLAYS WILL NOT CONVERT

Your Custom Reports in GCLRA will not be converted to ROAM Matrix.

## CREATE CUSTOM DISPLAYS

To Do: Create Custom Displays

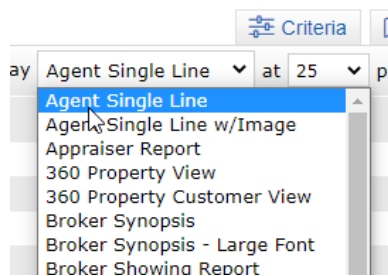
- Run a Search. The Agent Single Line is the default display.
- Hover over the icon to the right of “per page”. (It looks like a page of paper with a pencil on it.) It will say Manage Displays. **Click on the Manage Displays icon.**
- Choose **Save as a Copy**.
- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Custom Displays**.
- A list of Custom Displays will be shown.
- Click on **Edit** and you can add or remove items as needed.

There is no option to create full-page reports. It is recommended to use Microsoft Word to create a report or flyer for your listings.

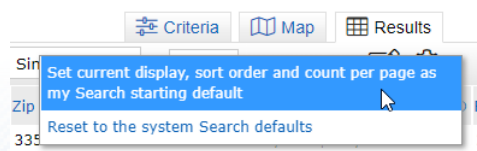
## SETTING A DEFAULT DISPLAY

When searching, the default display is the single-line summary. To change this to a different system display or one that you customized under Custom Displays, use the following steps.

- Run a Search. The single-line summary will be the default display.
- Choose the display desired, such as Agent Thumbnail, from the Display selection menu at the top of the single-line display.



- Select the **set default wheel** located to the right of the Display options. Choose the **Set Current Display** option.



- To return to the single-line display as your default, choose the Reset option instead.

## CUSTOM EXPORTS

Your Custom Exports in GCLRA will not be converted to ROAM Matrix.

If the system export is not sufficient, you can create your own export layout. Follow the steps below to create your custom export file layout.

- Click on Your Name in the top right corner to access the **Utility Menu**.
- Select **Settings**, then **Custom Exports**.
- Choose **Add an Export**.
- **Name** the Export layout.
- Choose the fields desired and click on **Add** to move them to the Export Fields side of the screen.
- Choose **Label** if you would like a header with the data.
- Choose your preference between Comma delimited or Tab delimited.
- Add a description, if desired.
- Click on **Save**.

Your export format will now be available from the Export function on the search results screen.

## CMAS

CMAs from your old system will not be converted to ROAM Matrix. If you have CMA's you need from GCLRA Matrix, we recommend you save each CMA as a PDF on your computer. Or, you can recreate the CMA with ROAM Matrix.

There is no limit to the number of CMA's you can have. CMA's with over 365 days of inactivity are purged from the system.

## INPUT.

There will be no input in ROAM during User Parallel. There will be an Input Outage at cutover. Remember that incomplete listings at the time of cutover will not be brought over to ROAM Matrix. Ensure that all your listings are completed prior to the Input Outage in GCLRA. Also remember that once new listings are added in ROAM, the ROAM required fields must be entered. Older listing should be grandfathered for input values

**NOTE:** During Member Parallel, you will continue to input new inventory and manage your existing listings on GCLRA Matrix. Access to ROAM input will become available once the full transition complete – after the Cutover.