



FAQ
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What is HomeView?

HomeView is a first-of-its-kind app that empowers RE/MAX affiliates to provide ongoing value to their buyers and sellers. In sharing the app with clients, real estate brokerages and agents position themselves at the center of a long-term consumer relationship.

More than 90% of consumers say they'd work with the same agent again, while less than 15% actually do. HomeView looks to bridge this gap by maximizing repeat and referral business.

With HomeView, agents can give clients and potential clients a personally branded mobile app that adds value at every stage of the home ownership journey. The app enables consumers to search for homes and favorite properties. Later, as owners, they can track and understand their home value, stay on top of market trends, and get tips for maintaining their home.

With integrated chat and engaging user experience, consumers are 30 times more likely to initiate a conversation with their agent directly through HomeView.

Where is HomeView available?

The app is available to U.S. RE/MAX affiliates in Company Owned Regions – at no additional cost to the affiliates or their users. They must, however, be onboarded to the MAX/Tech powered by BoldTrail FrontOffice to get the HomeView app.

What steps need to be taken before sharing the HomeView app with clients?

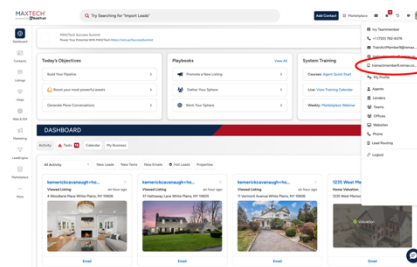
Agents should take the following actions inside their MAX/Tech powered by BoldTrail account:

- Update their profile and profile image
- Import their contacts into BoldTrail
- Download the MAX/Tech powered by BoldTrail app and enable push notifications

How does an agent share or invite a client to the app?

There are multiple ways to do this.

- Inside MAX/Tech powered by BoldTrail, agents can access a unique link to share their HomeView app. This is located in the upper right-hand corner, under their picture. Click the Agent website next to the mobile icon.



- The link to the app can be shared via text, email, or through the MAX/Tech powered by BoldTrail CRM.
- The link can also be shared directly from a contact record in the mobile app or on the desktop. In the mobile app, tap the "+" button for an option to share with the consumer. On the desktop, agents can share the link from within the contact record in the bottom right corner.
- Agents can also send invitations within the MAX/Tech powered by BoldTrail CRM via Search Alerts and Market Reports. These will include a link and QR code to sign up.

Upon receiving the invitation, the client will see a QR code or place to sign in to download the app. Once they do that, they will be connected to the agent's branded HomeView app.

What if a consumer downloads the app from an app store?

If a consumer visits an app store and downloads HomeView without using an agent's download link, they will see a pop-up letting them know that they need an invitation to register an account and instructing them to reach out to their agent.

Where and how does an agent manage the app?

Agents manage all HomeView activities within MAX/Tech powered by BoldTrail. This includes exchanging chats or receiving updates from the consumer. These activities are automatically posted on the client's activity timeline within the MAX/Tech powered by BoldTrail CRM.

What functionality can agents leverage when their consumer has the app?

Agents can communicate directly with their clients and enroll them in campaigns within MAX/Tech powered by BoldTrail. These campaigns send consumers app notifications for:

- Market Reports
- Valuation Reports
- Property Alerts (Saved Searches)
- Updates on Saved Homes

Additionally, HomeView will notify the consumer of various events and prompt them with action items, including:

- **My Home:**
 - Reminder to add address

- Reminder to add mortgage info
- Reminder to add insurance policy
- Inactive for 30 days → Reminder to check value
- **Move:**
 - New activation
 - Reminders at days 2, 3, and 4 days prior to move date
 - Updates at the 50% and 76% progress points
- **Maintenance:**
 - A seasonal maintenance checklist

What if the consumer is in multiple agent databases?

The consumer will be branded to the agent whose download link they use to access the app. If they want to switch to a different agent, they'll need to log out and re-enter the app using that agent's unique download link. This will create a separate profile under the new agent.

What if a consumer isn't in BoldTrail and accesses the HomeView app?

Any consumer can use an agent's download link to access the app. If the consumer is new — and not in MAX/Tech powered by BoldTrail — a new contact record will be created and added to the CRM as a new lead.

What happens if a consumer doesn't create an account?

In the web experience, consumers won't be prompted to login until they try to save or update information, favorite listings or searches.

On the mobile app, consumers are required to register and login before using any features.

Where does a consumer go for support if they are having trouble with the HomeView app?

Consumers can use the chat function with their agent. The agent will be notified via MAX/Tech powered by BoldTrail and can put in a support ticket.