

Homebot Frequently Asked Questions

Newly added questions since the last update to this doc are **bold and blue**.

Migration Questions

Q: Will MyWindermere AVM subscriptions migrate to Homebot?

A: Yes, consumer subscription will follow users to Homebot when the agents accounts are activated. MyWindermere monthly emails will stop going out on March 16. The dashboard will also be inaccessible after March 16 for the migration.

Q: What if I already subscribe to and pay for Homebot right now?

A: Homebot will reach out directly and provide instructions on how to switch your subscription to the Windermere account.

Q: What if I already partner with a loan officer?

A: Homebot will reach out to with details based on the type of subscription/program you have now and present migration options. You'll continue to operate under your current subscription until you have authorized an account migration.

Q: How do I know if my Homebot account will be migrated for me or if I need to do something to migrate?

A: Homebot will reach out directly and provide instructions if you need to make the migration yourself. If you are currently paying Homebot directly or associated with a Loan Officer, you'll be required to authorize the migration. Keep an eye out for a communication from Homebot in the coming weeks leading up to launch of the Suite offering.

Q: What if I used to have an account with Homebot, but don't use it currently?

A: If you were a previous Homebot subscriber and we were able to identify you as a Windermere agent using your primary email address, your account will be automatically migrated *unless* it was converted to direct pay or associated with a Loan Officer.

Q: I used to have a Homebot account, what client data will migrate over with the Windermere Suite account?

A: Previous client data including their address and agent inputted property value will be revived in the migration. This means, when you login to your new account through Windermere, all your old client data will be in there ready for you to review. Depending on how long ago you used your Homebot account and made updates to your client details, this information likely needs to be updated.

Q: Will my old property valuations migrate with the client data to my Windermere Suite account?

A: Yes, old property valuations will be in your client's profile. Those values will be adjusted based on the market changes since you input that CMA.

For example, if you added a CMA in 2024 for your client, Max Martin, for \$100,000 and the market has increased by 5% since then, Max's valuation will be \$105,000 when he gets his automated report after April 8.

Q: What can I expect if I have a previous Homebot account and I switched to MyWindermere?

A: We will migrate your MyWindermere client data into your Homebot account that's part of the Suite. Old Homebot accounts will also be revived as part of this migration.

Clients who have the same property address and email will be de-duplicated, but any clients with multiple addresses will have a subscription for each property. It's recommended that you check those clients who moved and should only have one property report to make sure their old home is not also in their profile.

Q: I have a previous Homebot or MyWindermere account, I understand that my client details will be migrated and I need to check on this between March 31 and April 7. What should I check for?

A: Check names of clients who got married or divorced and changed their names recently. Check that their email address is the most recent one that you've been using to communicate with them. Check on people who have moved recently that their property address(es) are up to date – note that people can get multiple Homebot reports if they have

multiple addresses in their profile, which means some people may have their old property address in their profile.

Q: I have a previous Homebot or MyWindermere account, I understand that my client details will be migrated and I need to check on this between March 31 and April 7. But I have a lot of clients in there and I'm not going to get through them all by April 7, what should I do?

A: You can buy more time by going into your account, click on "Account" in the menu on the left, and choose "Digest Settings" from the options at the top. Turn all the toggles off and click "Save." When you're ready to start sending reports out, you can toggle these back on.

The caveat here is that these settings are toggled off for the whole network until April 7. If you need more time, we recommend setting an alarm/calendar event on the morning of April 8 to go in and toggle everything off.

Q: I have a Homebot account and I use a live link to get users to sign up. Will that change when my account migrates to the Windermere account?

A: No, that permanent URL (PURL) will stay the same after you migrate.

Q: I have an active Homebot account that I use my personal email address for, what should I do to migrate to the Windermere enterprise account?

A: If your personal email address is already set as your primary address on the Roster, you're all set, we will migrate your account for you. If your personal email address is not listed as your primary address on the Roster, you'll need to reach out to Homebot support to transfer your account into the Windermere enterprise account.

Q: What is the cost of Homebot now?

A: It's included in the Suite fee!

Q: When will my clients start to receive messages from Homebot?

A: Messages will be sent from Homebot starting April 8.

Q: I've never had a Homebot or MyWindermere account, how do I sign up with Homebot?

A: No need to sign up, just sign in. Everyone will have an account ready for them on March 31. After that date, you will be able to login and start using Homebot as part of the Suite! The link will be available on Launch Pad.

Q: I've never had a Homebot for MyWindermere account, how do I sign up my clients to receive Homebot reports?

A: Login to your account and add your clients to your dashboard. You can add them individually, or upload a csv file.

[Add Homeowner's / Prospect's individually](#)

[Add Homeowner's / Prospect's in bulk via CSV or Excel](#)

Q: Is Homebot integrated with Cloze?

A: Not upon launch, but it's in the roadmap for a future release.

Q: Will Staff be able to work on behalf of Agents?

A: Not upon launch, but it's in the roadmap for a future release.

Q: I don't want to use Homebot, how do I make sure it's turned off?

A: If you are a previous user of Homebot or MyWindermere and have clients from those accounts migrated into the new Windermere account, you'll need to turn off the digest settings. To do that: login to your account with the link on Launch Pad, click on "Account" in the menu on the left, and choose "Digest Settings" from the options at the top. Turn all the toggles off and click "Save."

The caveat here is that these settings are toggled off for the whole network until April 7. If you need more time, we recommend setting an alarm/calendar event on the morning of April 8 to go in and toggle everything off.

If you have never used Homebot, you don't have to do anything. Your account will be waiting for you whenever you're ready to start.

Post-Migration Questions

Q: I'm a previous MyWindermere user and after reviewing my client details I see that I'm missing some clients after the migration to Homebot, what happened?

A: During the migration process Homebot validated the details and property addresses before creating a subscription for your clients. If any of that information would have resulted in a poor experience for your client, it didn't get moved into Homebot.

For example, you may have been allowed to accidentally enter a PO Box into MyWindermere. Homebot will not create a subscription for a PO Box. So if that showed up in the data during the migration, Homebot did not create a subscription for that person.

Q: Can I add a spouse or other person to the same property subscription?

A: Yes, multiple people can get the same report for the same property. To do this, go to the client's profile and scroll to the bottom to "Co-Borrowers" and click "Add a co-borrower"

Q: Can one person get a report for multiple properties?

A: Yes the same person can receive a report for multiple properties. To add a home to the client's profile, go to "Clients" and open their profile. Scroll to the end and click "Add a home" and fill in the details.