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CMA User Guide

This user guide will assist you with the creation of a full CMA Presentation. With Paragon 5, CMA Presentations are now created via a step-by-step wizard approach. At any point in the setup process you can save your CMA Presentation and return to complete it at a later time. You can also move directly to any section of a CMA package via the left frame tree navigation to access and edit any information.

CMA User Preferences

Before beginning the process of creating a full CMA presentation, it's a good idea to setup the preferences for your CMA Package. Within Preferences>CMA you can set the default display for the commonly used sections of a CMA Presentation.

Presentation Setup

This section allows you to set up default options for the sections of your CMA. Some of these sections, such as the cover letter are set up per CMA Presentation. A message will display for items that cannot be set with default settings. Each of these sections is available in the CMA Presentation and will be covered in detail within the Create Presentation section of this document.

Page Layout

Page Layout allows you to set your default Theme, default Footer and choose the default disclaimer to display (which are setup by your MLS).

Adjustments

This allows you to manually enter common adjustments that can be added to the Summary of Adjustments.

Report Setup

The report views, CMA Quick View and CMA Spreadsheet are the listing search result CMA views that can be customized directly within this section.

You can set the display order of the pages by clicking and dragging the label for each page into place. Page order can also be rearranged within the CMA Package.
CMA Wizard – Creating a CMA Presentation
The left frame of the CMA Wizard allows you to easily view the separate sections of the CMA Presentation. As you complete each section, the checkmark icons will switch to green informing you of what has been completed. In the upper right of this frame, a checklist is also available which displays all presentation sections (with checkmarks) at once. The Checklist also offers another method of navigation in your CMA. Clicking on any step in the checklist will take you directly to that screen in the CMA Wizard.

Presentation Name
The first step in creating the CMA is to enter a name for your CMA. It is the only step that is required in order to Save your CMA. You may skip this step initially, but a name must be entered prior to saving. Enter a descriptive name and select Continue to progress to the Subject Property.
Subject Property
There are three ways to enter a Subject Property for your CMA.

1. **Create a New Subject Property**
   When this option is selected you will be directed to a screen to select a specific class. Once a Property Class is selected you will be directed to the input form to create a Temporary Listing that can be used as a Subject Property and can later be converted to a full MLS listing.

2. **Load a Subject Property**
   If you have previously created Subject Properties, they will be available for selection from the modal display. Click the row to select the desired subject property and click **OK**.
3. **Use an Existing MLS Listing**

When this link is selected, an MLS number field will appear that allows you to manually enter the MLS number of an existing listing to use as your Subject Property.

![Use an Existing MLS Listing](Image)

Subject Property Overview

A variety of controls are available on the Subject Property Overview screen:

- **Save**: Saves any changes to the report view
- **Print**: Prints the Subject Property Report
- **Email**: Opens an email window with the report attached as a PDF
- **Edit**: If you have rights to the Temp listing or MLS listing, this function brings up the Maintenance form for editing.
- **Delete**: Removes the Subject Property and takes you back to the beginning of the Subject Property Step. *This does not delete the Subject Property or MLS Listing.*
- **Add/Edit Photo**: Accesses Photo Administration, you must have rights to the Temp listing or MLS listing to edit the photos.
- **Select View**: Select from a variety of Subject Property report views. Standard are Subject Property 1, Subject Property 2 and Subject Property with Map. Additional details may be available if created by your MLS.
Client

1. **Create a New Contact**
   This option takes you to the form where you can save basic information for a client.

   ![Contact Information Form]

   Allows you to add full details for a Contact and is added to your saved Contacts.

2. **Select Client from Prospect list.**
   This allows you to open your list of stored Contacts to select as a Client for this CMA.

   ![Select Client List]
Comparables
The Comparables section allows you to easily add comp properties to your presentation.

- **Save**: Saves your CMA Presentation
- **Print**: Allows you to use the PDF view to print the list of comparable properties
- **Email**: Allows you to email a PDF attachment of the comparable properties
- **Add**: Takes you to the Class selection and search criteria to select properties to add to the Comparables list
- **Remove**: Check the listings on the grid to remove those you don’t want from the list
- **Up/Down**: Check a listing or listings to reorder them on the list
- **Customize**: Displays a modal view of the available MLS fields for customization for the spreadsheet grid

While adding comparables to your CMA, your search criteria and search results will remain available to you as separate tabs. Once you navigate away from the comparables step, those tabs will disappear.
Adjustments
The Adjustments section allows you to add either Manual Adjustments or Adjustments saved from your User Preferences.

Click to manually add property adjustments.

Click to add Saved property adjustments – the list of Saved Adjustments from your preferences will display.

Select to customize the fields displayed in this view.

Manual adjustments can also be made per field.

The property Price will automatically recalculate as adjustments are entered.
Page Layout
Page Layout options allow you to setup various display elements in the pages of your CMA presentation.

Choose Theme
There are five different themes available for selection for your CMA Package: Modern, Vivid, Traditional, Elegant, and Contemporary. Select the radio button for the view that you prefer and click the Preview button to view the first page of your presentation.
Footer
With the Footer options you can select various items to display at the bottom of each page of your presentation. Check “Would you like to use a Footer?” to activate and display the options.

1. Footer Text
Type in any text to appear in the footer.

2. Text Alignment
Sets the alignment for text in Step 1.

3. Logo or Picture
The Logo and Agent Image configured in your User Preferences will display. Select the checkbox to display either image within the footer.

4. Single Image Alignment
When a single image is selected you can place it on the Left or Right side of the text.

Note: To reduce confusion and better work with the new CMA Themes, the Header Options have been removed with Paragon 5.

Disclaimer
Select the radio button on the Disclaimer option you would like to display in your CMA Presentation. These Disclaimer options are determined by your MLS.

DISCLAIMER
Select from a variety of MLS defined disclaimers for your CMA Presentation.

Select Disclaimer:
- No Disclaimer
- This information is not guaranteed.
- This information is not guaranteed. EQUAL HOUSING OPPORTUNITY
Presentation Setup
Through the entire Presentation Setup section, three controls are constantly available which enable you to Save, Preview (current report) or Generate the full CMA Presentation.

**Save**
It’s always a good idea to click **Save** as you complete the sections of the Presentation setup.

**Preview**
Preview will display any section that you are currently working in within a modal display window.

**Generate**
Generate will create the full CMA Package and is available for use starting with Step 5 and the package can be generated from any page forward.
Cover Page
The Cover Page options allow you to enter details to appear on the first page of your CMA Presentation.
Cover Letter
The following options allow you to set up the various components for a cover letter to be included within your CMA Presentation. Remember that you can configure up to three different cover letters under your CMA User Preferences. You can then easily modify the body of the letter via the link illustrated below. Any edits to the cover letter body will be saved in User Preferences when the CMA is saved.
Agent Resume

Within the Agent Resume you can enter resume information or select from the resumes that you saved within your User Preferences.

Use the drop down to select from the three available resumes.
**Company Info**

Users who are Brokers or MLS Administrators only have access to edit the display of the Company Info section of the CMA presentation. Brokers can set this default information up under their User Preferences for CMA's.
**Comparable Price Analysis**

This section allows you to select from a variety of pricing options for calculating the Comparable Price Analysis report. Chart Options offer controls to adjust the display of report labels, X & Y gridlines, graph colors and graph bar transparency.

The report will display a comparative graphical representation of the selected pricing method based on the Low, Average and High Prices and the Subject Property along with the Suggested List Price for the Subject Property.

You can edit the Suggested List Price and select the checkbox to update the Subject Property price from this field.
Using the Color Selector for Report Graphs

You can easily customize the displayed color and transparency for the report graph bars. To open the Color Selector single click the box to edit the color for the Low, Average, High and Subject Property bars within the graph.

Click anywhere in the color field to select a color value.

Left: Current selected color value. Right: Previously selected color value.

Standard RGB color codes can be entered to apply select colors.

Click to apply color to the text or object.

Use the spectrum slider bar to select the Hue to display in the color field. Click and drag the arrows up and down to change the color hue.
Subject Property Detail
Here you can select the Subject Property Detail report to be used for your CMA Presentation. You can easily customize and setup the default report for the drop down list under Preferences>CMA>Report Setup.

Clicking Modify displays customization options for the report view. Any white section on the report can be selected to select fields for display.
### Summary of Adjustments

The Summary of Adjustments report will only appear if adjustments have been added to the comparable properties in your CMA Presentation. This is a static report and cannot be modified.

<table>
<thead>
<tr>
<th>Address</th>
<th>MLS #</th>
<th>Price</th>
<th>Adjusted Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1765 S Lake Crest Way</td>
<td>96427424</td>
<td>$899,000</td>
<td>$911,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garage Capacity</td>
<td>$5,000</td>
</tr>
<tr>
<td># Baths</td>
<td>$17,000</td>
</tr>
<tr>
<td># Acres</td>
<td>$5,000</td>
</tr>
<tr>
<td># Beds</td>
<td>($15,000)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>MLS #</th>
<th>Price</th>
<th>Adjusted Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>52 Pinnacle Court</td>
<td>2000000010</td>
<td>$900,000</td>
<td>$904,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garage Capacity</td>
<td>($18,000)</td>
</tr>
<tr>
<td># Baths</td>
<td>$17,000</td>
</tr>
<tr>
<td># Acres</td>
<td>$5,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>MLS #</th>
<th>Price</th>
<th>Adjusted Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>4241 N Cowboy</td>
<td>96426450</td>
<td>$855,000</td>
<td>$875,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garage Capacity</td>
<td>($18,000)</td>
</tr>
<tr>
<td># Baths</td>
<td>($7,000)</td>
</tr>
<tr>
<td># Acres</td>
<td>$50,000</td>
</tr>
<tr>
<td># Beds</td>
<td>($45,000)</td>
</tr>
</tbody>
</table>
Comparable Report (Horizontal and Vertical)

There are two options for the Comparable Report – Horizontal or Vertical, both of which offer the same options for customization.

When “click here” is selected the Field preferences screen will display to customize the field display for the report.

Subject Property Display

You can select from the options on how the subject property is displayed on the (Horizontal and Vertical) Comparable Reports from don’t display the subject property, display on the first page or on every page.

Display Class Summary Statistics

On the Horizontal Report only a drop down field is available which allows you to apply the display of an additional field on the list in the report view. The view adjusts accordingly to fit the data.

When selected a summary of the stats for the specific listing class for the properties will display at the bottom of the full report view.
CMA Summary
The CMA Summary Report is a statistical view which can be customized to display a variety of fields available in the MLS. The default fields are displayed and cannot be removed. You can add up to five additional fields to the report. The Class specific Summary Statistics will display at the top of the report. These are the same set of stats that are covered under “Display Class Summary Statistics”. 

Click here to customize CMA field preferences.

CMA SUMMARY REPORT

<table>
<thead>
<tr>
<th>Residential Summary Statistics</th>
<th>HIGH</th>
<th>LOW</th>
<th>AVERAGE</th>
<th>MEDIAN</th>
</tr>
</thead>
<tbody>
<tr>
<td>LP:</td>
<td>$500,000</td>
<td>$895,000</td>
<td>$839,000</td>
<td>$899,000</td>
</tr>
<tr>
<td>SP:</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Residential - Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>1765 S Lake Crest Way</td>
</tr>
<tr>
<td>52 Pinnacle Court</td>
</tr>
<tr>
<td>4241 N Cowboy</td>
</tr>
<tr>
<td>Total Listings</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Comparable Property Statistics
This section allows you to select from a variety of report display options for the Comparable Property Statistics report. Chart Options offer controls to adjust the display of report labels, X & Y gridlines, legend, graph colors and graph bar transparency.

This report displays a graphical comparison of List Price to Sold Price for the Comparable properties added to your presentation. Additional information for Lowest Asking Price, Average Asking Price, Highest Asking Price, Lowest Sold Price, Average Sold Price, Highest Sold Price, Average Price/Apx Sqft and Average Days on Market will assist you with a pricing strategy for your Subject Property.

For how to adjust graph colors refer to Using the Color Selector for Report Graphs.
**Seller’s Net Sheet**

This calculator helps the client determine the net proceeds that will result from the sale of their home given outstanding mortgage balances and fees associated with the sale of the home, including realtor fees, and a refund of any existing escrow account balances.

Entries are fully customizable for this report. The final report also includes signature lines for both the seller and the Broker/Realtor.
Map
You can select from a variety of Map styles to apply to your CMA Presentation. Note that if you have a large amount of listings in the CMA presentation only the first fifty listings will be displayed on the Map. You can also use the various mapping controls to adjust the zoom level and positioning of the selected map view.
Final Comments
This area allows you to create any final comments for your client. All modifications will be save when the CMA Presentation is saved.
**View Presentation**

**Final Presentation**
Clicking **Generate** at any point in the process of creating the CMA report (From Step 5) will display the full presentation in the Presentation frame allowing you to scroll through the entire presentation. From this view you can Print, Email the Presentation as a hyperlink or download a printer driver that allows you to print the CMA Presentation to PDF. When “Info on Saving to PDF” is clicked, you will be taken to a link with instructions on how to install the driver.