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Welcome To The Paragon™ 3.4 CMA Guide

The following tutorial will assist you in performing the steps necessary in creating a CMA Packet in Paragon. For Additional information, login to Paragon and choose Help from the blue navigation bar. Type in CMA under keyword and examine the results...



CMA Presentations

About CMA Presentations

A comparative market analysis, or CMA, is a real estate agent's evaluation, based on local listing and sales data, to determine the probable sale price of a property in the current market. Sellers can use a CMA to help determine a list price. Buyers can use a CMA to help them decide what to offer on a listing they want to buy.

The CMA module in Paragon 3 contains a CMA presentation builder that allows you to easily create multiple CMA presentations. These presentations can be printed or emailed to any potential client. A CMA presentation includes many different items such as subject properties, cover letters, listing photos, etc. Multiple CMA presentations can be created and saved to be used when needed.

The screenshot shows the 'REPORT SETUP' window in Microsoft Internet Explorer. The window title is 'CMA Presentation: FNIS Test - Microsoft Internet Explorer'. The interface has a navigation bar with tabs: 'Subj-Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup' (selected), and 'Presentation'. There are 'Save', 'Close', and 'Generate Presentation' buttons. The 'REPORT SETUP' section is active, showing a list of reports to include on the left and a 'COVER PAGE' configuration panel on the right. The 'COVER PAGE' panel includes fields for Page Type (Subject Property), Title (Residential Market Analysis), Comments (There's No Place Like Home), Prepared For (Name: Bob Homebuyer, Address: 12345 Main Street, City: Anywhere, State: KS, Zip: 66111), Prepared By (Agent Name: FNIS Master, Office Name: FNIS, Office Address: 8901 Rosehill Road, Office City: Lenexa, State: KS, Zip: 66215, Phone: (913) 492-6900, Email:), and checkboxes for Include SP Pic, Include Logo, and Include Picture.

The CMA Presentation builder in Paragon 3 has been laid out in logical fashion so an agent can click through the tabs left to right in the presentation window to complete the process. This includes the following seven steps to build the presentation:

1. Create or Select Subject Property
2. Create or Select Client
3. Add Listings to Comparables
4. Insert Adjustments
5. Select Theme and Header/Footer in Page Setup
6. Set Up Reports
7. Generate Presentation and Email

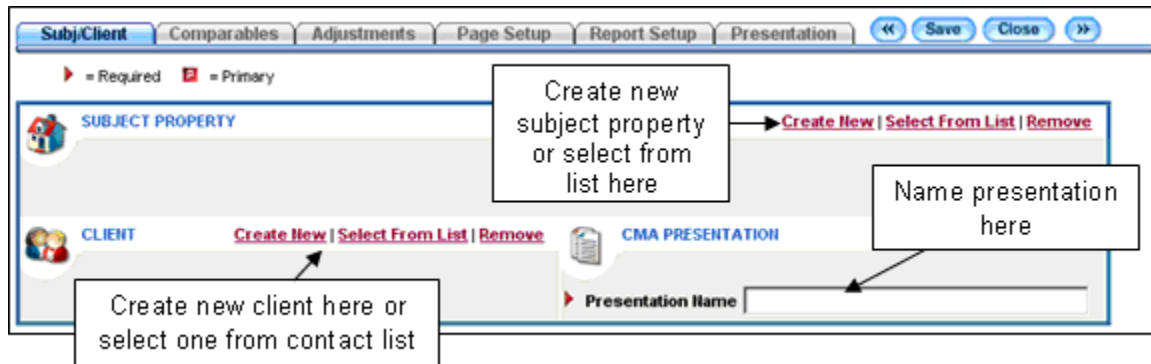
To begin the process in Paragon, click CMA > Create New CMA Presentation.

Step 1: Create or Select a Subject Property

To begin the process in Paragon, click CMA > Create New CMA Presentation. The page will default to the Subj/Client tab.

To create a new subject property

1. Click the **Create New** link on the Subj/Client page.
2. Select the Class for the search and click the Apply button
Note: From this page, you can click on the Copy Listing link from the menu options at the top to copy a current listing to use as the subject property. For more info, see "Copying a Subject Property" in the help section of Paragon.
3. Enter all of the criteria for the Subject Property and click **Save** – this will return users back to the Subject Property page displaying the new listing information and photo and the ability for photo maintenance by clicking on the **Add/Modify Photo** link. The listing is also added to the list of available subject properties for future use.



To select a current or previous subject property

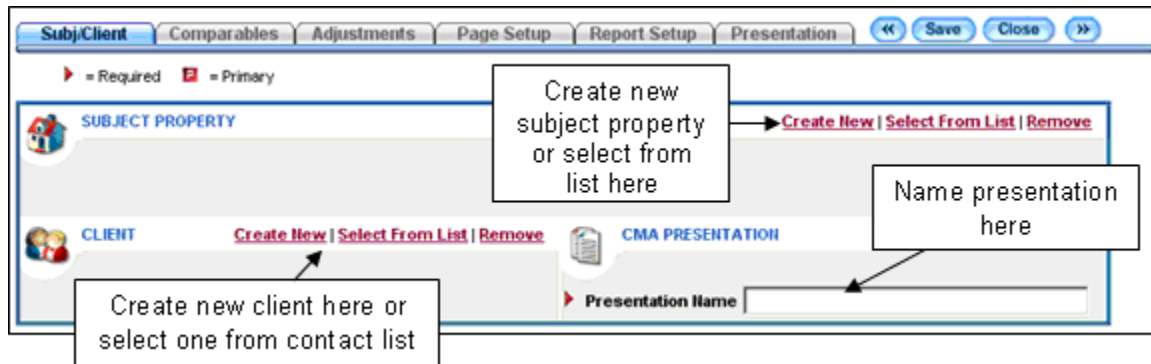
1. Click on the **Select From List** link in the top right corner. A CMA Temp/Subject Property Listings window will launch.
2. Scroll to the listing that you wish to add
3. Click the round radio button next to the listing
4. Click the **Select** link and the listing info will be added to the Subj/Client page.

Step 2: Create or Select a Client

Create or Select Client

To create a new client

1. Click the **Create New** link next to the Client icon. A new Contact Manager will open.
2. Complete the information for the new client and click **Save This Contact** (this adds the client permanently to the agent's contacts).
3. Click on the X in the top right corner to close the Contact Manager window and return to the CMA Setup.



To select current client from contact list

1. Click the **Select From List** link – a new Contact Manager will launch with a list of current contacts.
2. Search for contact on list and click the button next to the contact
3. Click OK and the client will be added to the CMA

Step 3: Add Listings to Comparables

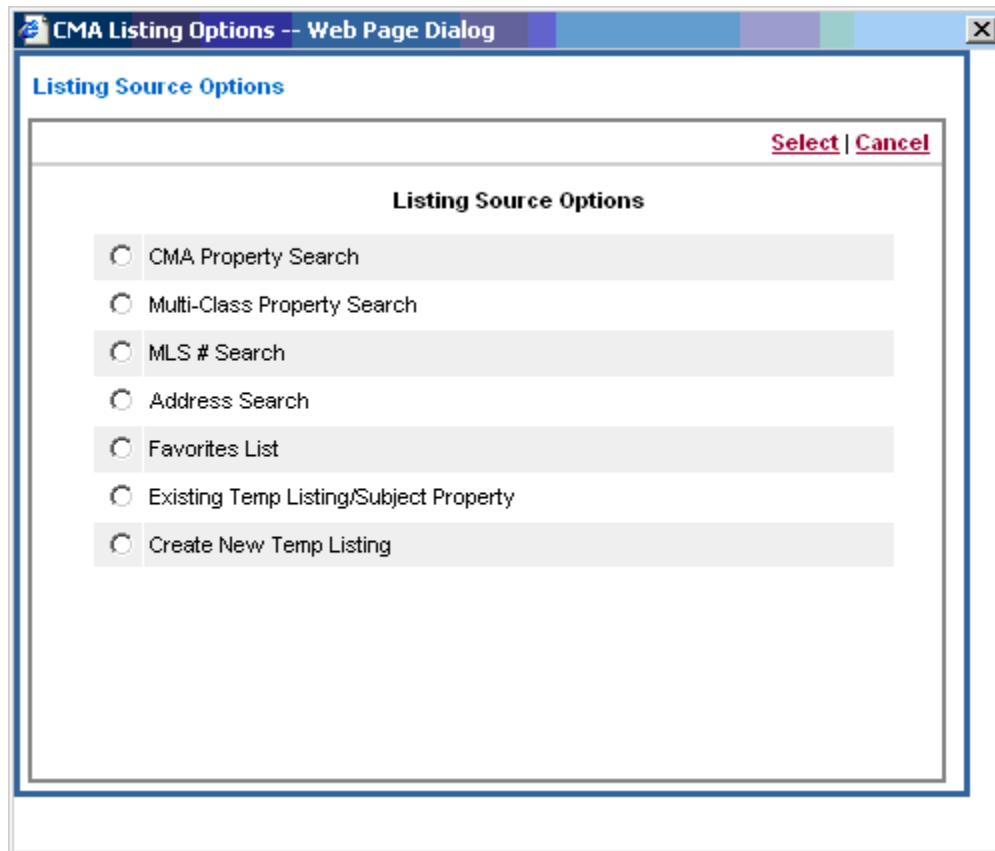
Add Listings to Comparables

1. Click on the Comparables tab



2. Click **Add Listings** (from the above window)– a new window will launch with CMA Listing Options
3. Select the listing source option (from the following window)

Note: If a search option is selected, individual listings can be added to the Comparables by highlighting the listings to include and clicking the Add To CMA link



4. Once the listings have been added, they can be re-ordered by clicking the **Move Up | Move Down** links (in the following window).

Subj/Client | **Comparables** | Adjustments | Page Setup | Report | Close

ABLES | Total Listings: 10 | [Print Email](#)

[Move Up](#) | [Move Down](#) | [Add Listings](#) | [Remove Listings](#) | [Customize / Sort](#)

	Class	Type	Address	Status	# Fireplaces	# Full Baths	# Half Baths	# Bedrooms		
	Single Family	House	808 Bur Oak	Active	1	2	1	4		
	Single Family	House	115 W HARVEST DR	Active	1	2	2	4		
3	<input type="checkbox"/>	\$234,900	Single Family	House	818 Lazy Lane	Active	1	3	1	5
4	<input type="checkbox"/>	\$234,900	Single Family	House	8536 Old U.S. HWY 52 W	Active	0	3		
5	<input checked="" type="checkbox"/>	\$239,000	Single Family	House	541 OLD FARM RD	New	1	3		
6	<input checked="" type="checkbox"/>	\$239,500	Single Family	House	2909 Henderson	New	1	3		
7	<input checked="" type="checkbox"/>	\$239,900	Single Family	House	3370 WHIRLAWAY COURT	Active	1	3		
8	<input type="checkbox"/>	\$239,900	Single Family	House	718 W Washington Street	Active	0	3		
9	<input type="checkbox"/>	\$240,000	Single Family	House	502 HILLCREST ROAD	New	1	3	2	3
10	<input type="checkbox"/>	\$244,900	Single Family	House	4010 FARMINGTON	New	1	2	1	4

5. More listings can be added by clicking on the **Add Listings** link.

- Listings can be deleted from the list by selecting the listings to be deleted and clicking on the **Remove Listings** link.
- The data in the list can be customized and sorted by clicking on the **Customize / Sort** link. A new Web Page Dialog window will launch.
- Features can be added by selecting **Features** (or Feature Categories) from the Group drop-down menu in the top left corner.
- Then users just need to highlight the features they want to add and click the **Add >** button to include them in the comparable.
- **Note:** From this page, the listings can also be printed or emailed by clicking on the **Print/Email** link at the top of the page.

Step 4: Insert Adjustments

1. After the Comparables have been added to the CMA, click on the Adjustments tab
2. Enter the amount for the adjustment in the blank field at the end of each row..

Subj Client | Comparables | **Adjustments** | Page Setup | Report Setup | Presentation | Save | Close

ADJUSTMENTS

Customize to add fields or features → Customize

<< Prev 3 of 10 Next >>

Subject Prop | Comparable

MLS #	Temp-1090		
BR	4	5	\$5,000
= Full Baths	2	3	-\$2,500
= Half Baths	1	1	
= Rooms	11	10	\$2,500
Class	RS	RS	
Type	H	H	
Area	500	100	
Address	2107 LONGSPUR	818 Lazy Lane	
City			
ST			

+ Manual Adjustment | + Saved Adjustment

ADJUSTED PRICE \$239,900

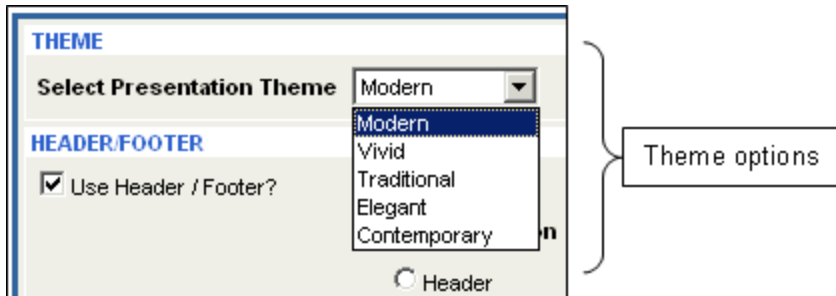
3. The comparables can be customized by clicking on the **Customize** link in the top right corner of the window. In Paragon, Features and Feature Categories can be added to the comparable.
4. Manual and saved adjustments can be added at the bottom of the adjustments page.

Note: The adjustments will need to be entered for each listing (if necessary).

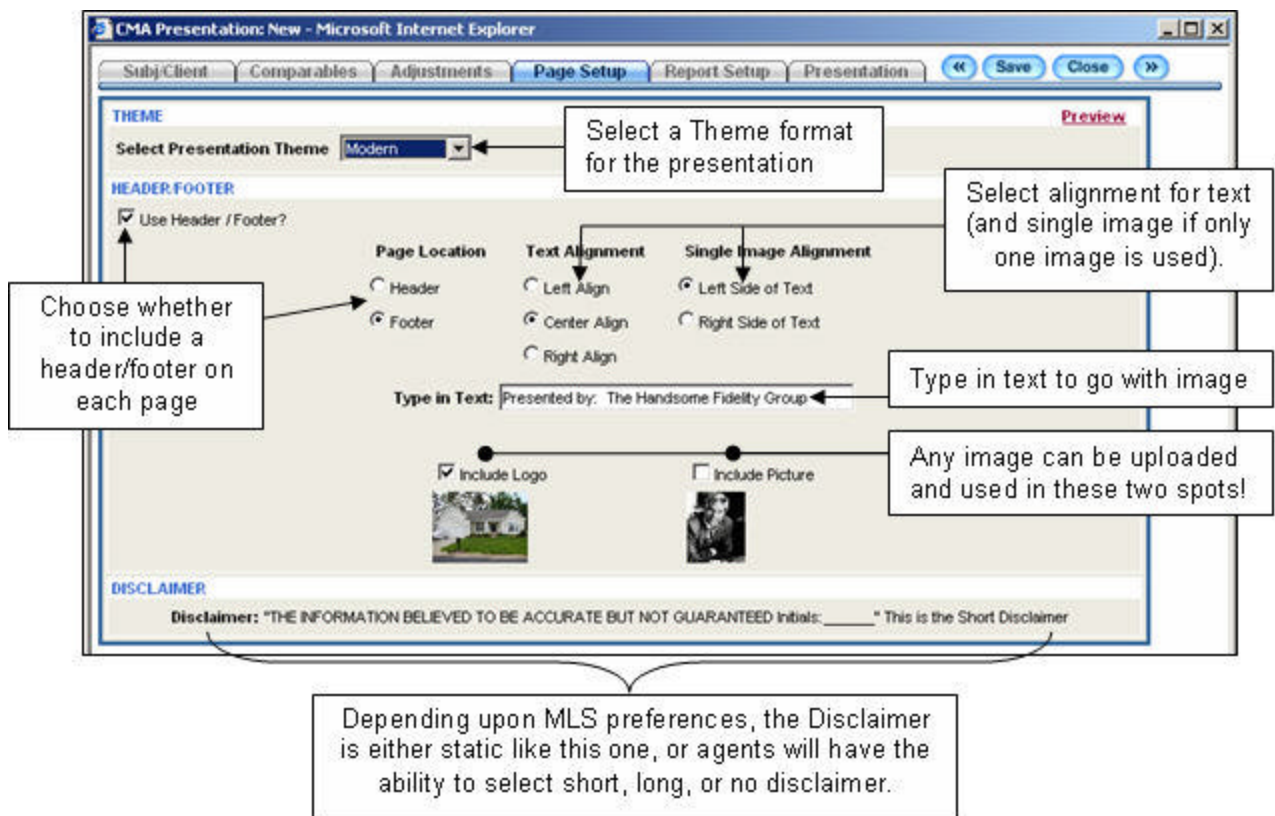
Step 5: Select Theme and Header/Footer

From this page, agents can determine which theme, header/footer and disclaimer to use in their presentation.

1. Select Presentation Theme



2. If including a header or footer, select whether it will be a header or footer under Page Location
3. If including text, enter the text and select the text alignment
4. If only one photo is being used, select the alignment under Single Image Alignment
5. Even though the field is called "Include Logo" any image can be uploaded to this holder (as well as the "Include Image" holder).
6. Depending upon MLS preferences, the Disclaimer will either be static (as shown) or there will be options for the agent to select the Long, Short or No Disclaimer.



Step 6: Set Up Reports

After Themes and Header/Footers have been set up, the next step is to set up the reports to be included into the CMA.

The 14 following reports can be added to the CMA. The following graphics will show some examples of how each one is used, turned on, etc.

For detailed examples of all these reports, click [here](#)

- [Cover Page](#)
- [Cover Letter](#)
- [Agent Resume](#)
- [Company Info](#)
- [Subject Property Detail](#)
- [Summary of Adjustments](#)
- [Comparable Report \(Horizontal\)](#)
- [Comparable Report \(Vertical\)](#)
- [CMA Summary](#)
- [Comparable Property Statistics](#)
- [Comparable Price Analysis](#)
- [Map](#)
- [Final Comments](#)
- [Seller's Net Sheet](#)

For all reports under the Report Setup tab, click the box in the Include column to add the report to the CMA. In addition, the reports can be re-ordered in the CMA by highlighting the report (so it has the black arrow to the left of the report name) and clicking the **Move Up | Move Down** link.

Cover Page

If including the Cover Page, complete the form on the right frame of the page.

CMA Presentation: FNIS Test - Microsoft Internet Explorer

Subj:Client | Comparables | Adjustments | Page Setup | **Report Setup** | Presentation | Save | Close

REPORT SETUP Generate Presentation

[Move Up](#) | [Move Down](#)

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

[Preview](#)

Click here to preview the Cover Page

COVER PAGE

Page Type: Include Header Footer

Title:

Comments:

Prepared For:

Name:

Address:

City: State: Zip:

Prepared By:




Agent Name: Office Name:

Office Address:

Office City: State: Zip:

Phone: Email:

Include SP Pic Include Logo Include Picture



Cover Letter

Paragon now allows users to modify the stored cover letter from the Cover Letter Report Setup page. Select the cover letter to include in the CMA and click the **Modify Default** link. The rich text editor will launch with and the agent can make necessary changes. Note: the text editor now includes spell check!

The screenshot displays the 'CMA Presentation: New - Microsoft Internet Explorer' window. The navigation tabs include 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup', and 'Presentation'. The 'Report Setup' tab is active, showing a 'Generate Presentation' button. On the left, under 'REPORT SETUP', there are 'Move Up | Move Down' links and a list of 'Include Reports' with checkboxes. The 'Cover Letter' option is selected and highlighted with a red box. The right side of the window shows a 'COVER LETTER' preview area with a form. The form fields are: Title (Cover Letter), Salutation (Dear Mr. & Mrs. Smith), Date (Tuesday, May 10, 2005), Recipient's Name (Prefix, First, Last), Recipient's Address (12345 Main Street, Address2), City (Anywhere), State (KS), Zip (66061), Closing (Sincerely,), and Agent Name (Bob Barker). Below the form is a 'Choose a letter' dropdown menu with options 'Cover Letter #1', 'Cover Letter #2', and 'Cover Letter #3'. A red box highlights the 'Cover Letter #1' option, and a red box highlights the 'Modify Cover Letter' link. A callout box with arrows pointing to the dropdown and the link contains the text: 'Click here to modify the selected cover letter'.

Agent Resume

Like the Cover Letter, the Agent Resume can be modified in the Reports Setup page.

The screenshot displays the 'REPORT SETUP' interface within a Microsoft Internet Explorer browser window. The browser title is 'CMA Presentation: CMA for BUGS BUNNY'. The navigation bar includes tabs for 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup', and 'Presentation'. The 'Report Setup' tab is selected, and buttons for 'Save', 'Close', and 'Generate Presentation' are visible.

The 'REPORT SETUP' section is divided into two main areas:

- Left Panel (Include Reports):** A list of reports with checkboxes. The 'Agent Resume' item is highlighted with a red box. Other items include Cover Page, Cover Letter, Company Info, Subject Property Detail, Summary of Adjustments, Comparable Report (Horizontal), Comparable Report (Vertical), CMA Summary, Comparable Property Statistics, Comparable Price Analysis, Seller's Net Sheet, Map, and Final Comments.
- Right Panel (Preview):** A preview area titled 'AGENT RESUME'. It features a dropdown menu labeled 'Choose Agent Resume' with options 'Agent Resume #1', 'Agent Resume #2', and 'Agent Resume #3'. A 'Modify Default' link is also present. A callout box with arrows pointing to the dropdown menu contains the text: 'Click here to select and modify the resume to be included in the CMA'.

Company Info

Like the previous two reports, the Company Info letter can also be edited from the Report Setup page.

The screenshot shows a web browser window titled "CMA Presentation: CMA for BUGS BUNNY - Microsoft Internet Explorer". The browser's address bar and navigation buttons are visible. The main content area is titled "REPORT SETUP" and contains two panels. The left panel, titled "Include Reports", has a "Move Up | Move Down" link at the top. It lists various reports with checkboxes, and the "Company Info" entry is highlighted with a red box. The right panel, titled "Preview", shows a preview of the "COMPANY INFO" report with a link that says "Click Here to modify the default Company Info." A callout box with an arrow points to this link, containing the text: "Click here to launch the text editor in order to make modifications to the stored Company Info letter".

Subj/Client Comparables Adjustments Page Setup **Report Setup** Presentation << Save Close >>

REPORT SETUP Generate Presentation

Move Up | Move Down

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Seller's Net Sheet
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments

COMPANY INFO

[Click Here to modify the default Company Info.](#)

Click here to launch the text editor in order to make modifications to the stored Company Info letter

Subject Property Detail

There are two views available for the Subject Property. These views can be customized under Preferences > Views Reports > CMA > Subject Property 1 & 2.

The screenshot displays the 'CMA Presentation: CMA for BUGS BUNNY - Microsoft Internet Explorer' window. The 'Report Setup' tab is active, showing a list of reports to include. The 'Subject Property Detail' report is highlighted with a red box. The 'Preview' window shows a dropdown menu for 'Choose view to use' with options 'Subject Property 1' and 'Subject Property 2'. A text box explains that this view is customizable from Preferences > Views/Reports > CMA > Subject Property 1 & 2.

REPORT SETUP ▶ Generate Presentation

Move Up | Move Down

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Seller's Net Sheet
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments

SUBJECT PROPERTY DETAIL Preview

Choose view to use: Subject Property 1 (selected), Subject Property 1, Subject Property 2

Select which Subject Property View to use in the presentation. This view is customizable from Preferences > Views/Reports > CMA > Subject Property 1 & 2.

Summary of Adjustments

The Summary of Adjustments report will only appear if adjustments have been added to the comparables. This report cannot be modified.

The screenshot shows the 'CMA Presentation: FNIS Test - Microsoft Internet Explorer' window. The navigation tabs at the top are 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup', and 'Presentation'. The 'Report Setup' tab is active, and a 'Generate Presentation' button is visible. The main area is divided into two sections: 'Include Reports' on the left and 'Preview' on the right. The 'Include Reports' section has a 'Move Up | Move Down' header and a list of reports with checkboxes. The 'Summary of Adjustments' report is checked and highlighted with a red box. The 'Preview' section shows a grayed-out area with the text 'SUMMARY OF ADJUSTMENTS' and 'Click Preview to view this report'. A callout box with an arrow pointing to the 'Summary of Adjustments' checkbox contains the text: 'No action is necessary for this report. Summary of Adjustments will be grayed out if no adjustments were added to the comparables.'

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

Comparable Report (Horizontal)

The Comparable Report is now customizable.

- Due to size constraints, only 12 fields can be added. In addition, agents have the ability to add the Subject Property on each page, at the top of the report, or not at all.
- Available remarks fields can be added to each property.
- Finally, a Class Summary Statistic report, which includes the High, Low, Average and Median price points, can be added to the bottom of the Comparable Report

The screenshot shows the 'CMA Presentation: FNIS Test - Microsoft Internet Explorer' window. The 'Report Setup' tab is active, showing a list of reports to include. The 'Comparable Report (Horizontal)' is selected. The configuration section for this report includes options for Subject Property Display and Remark Fields.

REPORT SETUP

Move Up | Move Down

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

COMPARABLE REPORT (HORIZONTAL)

Click Here to customize Horizontal Comparable Report field preferences.

Subject Property Display

Don't display the Subject Property

Display on the First Page

Display on Every Page

Agents now have the option where to include the Subject Property.

Display Class Summary Statistics

Select Remark Field: Pub Rmrks

- Addendum
- Dir's
- Address
- Priv Rmrks
- Pub Rmrks
- Virt Tour
- None

Select which Remark Field to include in the CMA.

The Horizontal Report is now customizable. However, due to size limitations, only 12 fields can be added.

The Class Summary Statistics is a report that appears at the bottom of the Comparable Report and includes the High, Low, Average and Median price points.

Generate Presentation

Preview

Comparable Report (Vertical)

Like the Horizontal Report, the Vertical Report is customizable. The Subject Property can be added to each page, and the Class Summary Statistics can be displayed at the end of the report. Unlike the Horizontal report, Remarks cannot be added due to limitations in the field sizes of the orientation.

Customize the Vertical Report by adding fields here

Generate Presentation

REPORT SETUP

Move Up | Move Down

Include Reports

- Cover Page
- Cover Letter
- Agent Resume
- Company Info
- Subject Property Detail
- Summary of Adjustments
- Comparable Report (Horizontal)
- Comparable Report (Vertical)**
- CMA Summary
- Comparable Property Statistics
- Comparable Price Analysis
- Map
- Final Comments
- Seller's Net Sheet

COMPARABLE REPORT (VERTICAL)

[Click Here](#) to customize CMA field preferences.
Note: Changes made will be reflected throughout the system.

Subject Property Display

- Don't display the Subject Property
- Display on the First Page
- Display on Every Page

Agents now have the option where to include the Subject Property.

Display Class Summary Statistics

The Class Summary Statistics is a report that appears at the bottom of the Comparable Report and includes the High, Low, Average and Median price points.

CMA Summary

The CMA Summary gives a one page summary of all of the comparables in the CMA. The included columns can be edited from this view or under Preferences > View/Reports > CMA tab > CMA Summary.

The screenshot shows the 'REPORT SETUP' window in Microsoft Internet Explorer. The window title is 'CMA Presentation: FNIS Test - Microsoft Internet Explorer'. The navigation tabs are 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup', and 'Presentation'. The 'Report Setup' tab is active, and a 'Generate Presentation' button is visible. The interface is divided into two main sections: 'Include Reports' and 'Preview'.

Include Reports: A list of reports with checkboxes and a 'Move Up | Move Down' header. The 'CMA Summary' report is selected and highlighted with a red box.

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

Preview: A preview of the 'CMA SUMMARY' report. It contains a link that says 'Click Here to customize CMA Summary field preferences' and a note: 'Note: Changes made will be reflected throughout the system.' A callout box points to this link with the text: 'Click here to change fields in the report. This can also be edited under Preferences > View/Reports > CMA tab > CMA Summary.'

Comparable Property Statistics

The Comparable Property Statistics Report is a list price comparison report of all properties included in the comparable, and displays the results in a chart format. The report orientation can be edited by clicking on the **Chart Options** link and selecting the attributes.

The screenshot displays the 'CMA Presentation: FNIS Test - Microsoft Internet Explorer' window. The 'Report Setup' tab is active, showing a list of reports to include. The 'Comparable Property Statistics' report is highlighted with a red box. A callout box points to the 'Chart Options' link in the 'PROPERTY STATISTICS' section, stating 'Click Chart Options launches this window'. The 'Web Page Dialog' window is open, showing the 'COMPARABLE PROPERTY STATISTICS' settings. A callout box points to the 'Value' and 'Category (X) Axis' sections, stating 'Select attributes for chart here.'.

REPORT SETUP

Subj/Client | Comparables | Adjustments | Page Setup | **Report Setup** | Presentation | Save | Close

Generate Presentation

Move Up | Move Down

Include Reports

- Cover Page
- Cover Letter
- Agent Resume
- Company Info
- Subject Property Detail
- Summary of Adjustments
- Comparable Report (Horizontal)
- Comparable Report (Vertical)
- CMA Summary
- Comparable Property Statistics**
- Comparable Price Analysis
- Map
- Final Comments
- Seller's Net Sheet

PROPERTY STATISTICS

Chart Options

Web Page Dialog

COMPARABLE PROPERTY STATISTICS | Save And Close

- Category (X) Axis Value
- (Y) Axis
- Category (X) Axis
 - Major Gridlines Minor Gridlines
- Value (Y) Axis
 - Major Gridlines Minor Gridlines
- Show Legend
- Colors
 - List Price Select A Color
 - Sold Price Select A Color
- Transparency %

Comparable Price Analysis

The Comparable Price Analysis Report is a list price comparison report based upon the Low, Average, High and Median list prices, and displays the results in a chart format. Like the Comparable Property Statistics, the report orientation can be edited by clicking on the **Chart Options** link and selecting the attributes.

Use the prices from the statistics or manually enter a List Price

Generate Presentation

Move Up | Move Down

Include Reports

- Cover Page
- Cover Letter
- Agent Resume
- Company Info
- Subject Property Detail
- Summary of Adjustments
- Comparable Report (Horizontal)
- Comparable Report (Vertical)
- CMA Summary
- Comparable Property Statistics
- Comparable Price Analysis**
- Map
- Final Comments
- Seller's Net Sheet

COMPARABLE PRICE ANALYSIS (SMART PRICE)

Chart Options

Click Chart Options to select or change attributes

<input checked="" type="radio"/> Use Low Price	\$195,900
<input type="radio"/> Use High Price	\$199,500
<input type="radio"/> Use Average Price	\$198,258
<input type="radio"/> Use Median Price	\$198,900
<input type="radio"/> Use Subject Prop Price	\$198,500

Suggested List Price

Update Subject Property Price when Presentation is saved?

COMPARABLE PROPERTY STATISTICS

Save And Close

Category (X) Axis Value (Y) Axis

Category (X) Axis

Major Gridlines Minor Gridlines

Value (Y) Axis

Major Gridlines Minor Gridlines

Show Legend

Colors

Low [Select A Color](#)

Average [Select A Color](#)

High [Select A Color](#)

Subj Property [Select A Color](#)

Transparency %

Map

The Map allows agents to add a map of the area with the properties appearing as a push pin or a house icon. The Map Report also includes a table with all of the listings displayed just below the map. The map can be edited to be zoomed in or out and increased or decreased in size.

The screenshot shows the 'REPORT SETUP' interface in Microsoft Internet Explorer. The browser title is 'CMA Presentation: FNIS Test - Microsoft Internet Explorer'. The interface has several tabs: 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup' (active), and 'Presentation'. There are 'Save' and 'Close' buttons. A 'Generate Presentation' button is also visible.

On the left, under 'REPORT SETUP', there is a 'Move Up | Move Down' link and a table with 'Include' and 'Reports' columns. The 'Map' row is highlighted with a red box and a right-pointing arrow.

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

On the right, there is a 'MAP' section with a callout box pointing to it: 'Click here to select the Mapquest image to include in the report. The map can be zoomed in or out with icons added for the properties'. Below this is a 'Preview' button with a callout box: 'Click here to preview the report'.

Final Comments

The screenshot shows the 'REPORT SETUP' window in Microsoft Internet Explorer. The window has several tabs: 'Subj/Client', 'Comparables', 'Adjustments', 'Page Setup', 'Report Setup' (active), and 'Presentation'. There are 'Save', 'Close', and navigation buttons at the top right. On the left, under 'REPORT SETUP', there is a list of reports with checkboxes. The 'Final Comments' report is selected and highlighted with a red box. A callout box points to a 'Click Here' link in the 'FINAL COMMENTS' preview area, with another callout box explaining that this link allows users to modify the report on the fly.

REPORT SETUP

Move Up | Move Down

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

Click here to preview the report

Generate Presentation

Preview

FINAL COMMENTS

[Click Here](#) to modify the Final Comments for this presentation

Like the Cover Letter, Agent Resume and Company Info Letter, this report pulls the stored letter from Preferences > CMA > Manage Reports and Adjustments. Here an agent can modify the report on the fly before inserting into the CMA.

Seller's Net Sheet

The Seller's Net Sheet is a tool to help the agent calculate an approximate closing cost and net cost to the seller. The report prints the data with a caveat at the bottom of the page emphasizing that the costs are an estimate. There are also spaces for the agent and seller to sign as an acknowledgement.

CMA Presentation: FNIS Test - Microsoft Internet Explorer

Subj/Client Comparables Adjustments Page Setup **Report Setup** Presentation Save Close

REPORT SETUP ▶ Generate Presentation

[Move Up](#) | [Move Down](#)

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

[Preview](#)

SELLER'S NET SHEET

Scenario Title

Price

Commissions = % = %

Encumbrances

First Loan	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
Second Loan	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>

Estimated Closing Costs

Title Insurance	<input type="text" value="\$300"/>	<input type="text" value="\$300"/>
Escrow Fees	<input type="text" value="\$185"/>	<input type="text" value="\$185"/>
Home Warranty	<input type="text" value="\$350"/>	<input type="text" value="\$350"/>
Tax Stamp	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
Pest Inspection	<input type="text" value="\$50"/>	<input type="text" value="\$50"/>

Total Est. Closing Costs

Net To Seller

Step 7: Generate Presentation and Email

Generate Presentation

There are two ways to generate the presentation. One, click the Presentation Tab. Two, click the Generate Presentation button.

The screenshot shows a web browser window titled "CMA Presentation: FNIS Test - Microsoft Internet Explorer". The interface has a "REPORT SETUP" section on the left and a "Preview" section on the right. A callout box points to the "Presentation" tab and the "Generate Presentation" button.

REPORT SETUP

Move Up | Move Down

Include	Reports
<input checked="" type="checkbox"/>	Cover Page
<input checked="" type="checkbox"/>	Cover Letter
<input checked="" type="checkbox"/>	Agent Resume
<input checked="" type="checkbox"/>	Company Info
<input checked="" type="checkbox"/>	Subject Property Detail
<input checked="" type="checkbox"/>	Summary of Adjustments
<input checked="" type="checkbox"/>	Comparable Report (Horizontal)
<input checked="" type="checkbox"/>	Comparable Report (Vertical)
<input checked="" type="checkbox"/>	CMA Summary
<input checked="" type="checkbox"/>	Comparable Property Statistics
<input checked="" type="checkbox"/>	Comparable Price Analysis
<input checked="" type="checkbox"/>	Map
<input checked="" type="checkbox"/>	Final Comments
<input checked="" type="checkbox"/>	Seller's Net Sheet

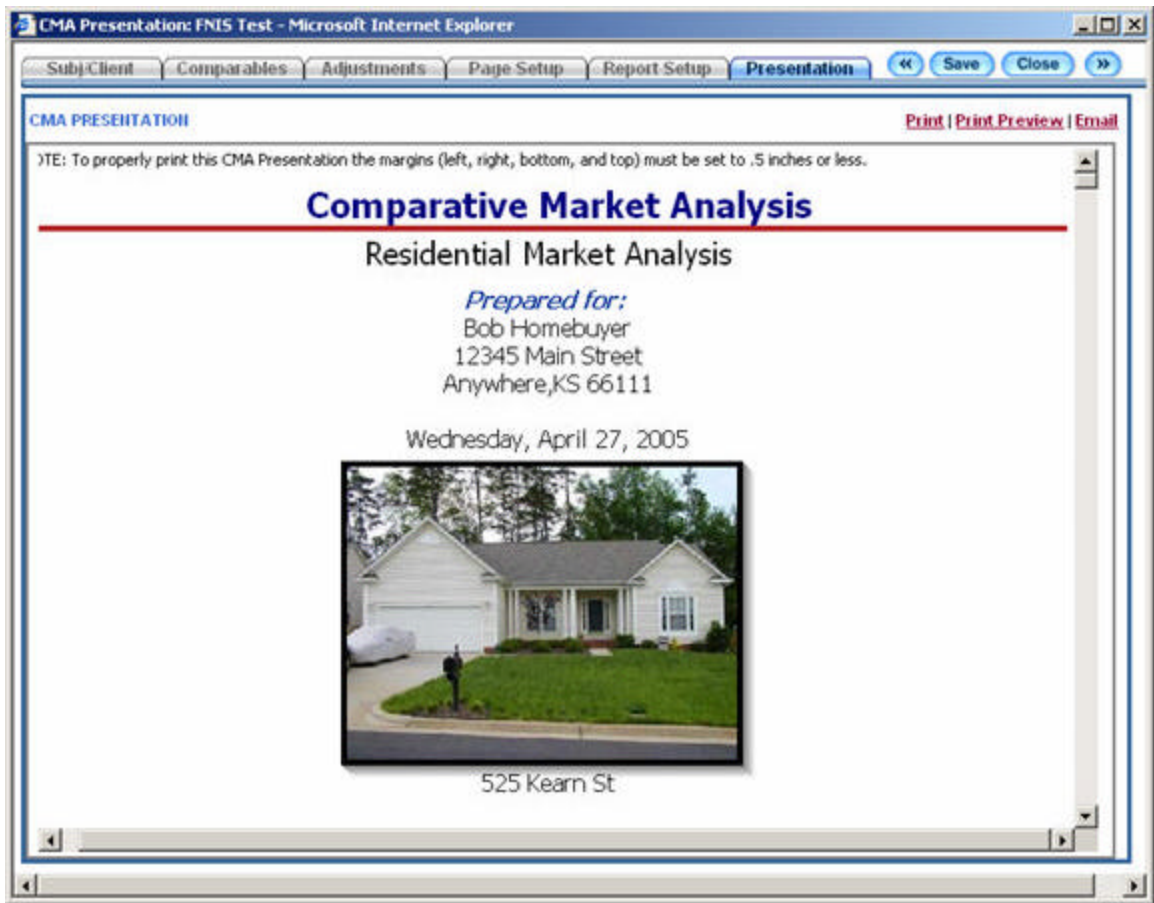
Preview

SELLER'S NET SHEET

Scenario Title	Low	High
Price	\$195,900	\$198,500
Commissions	\$5,877 = 3 %	\$5,955 = 3 %
Encumbrances		
First Loan	\$0	\$0
Second Loan	\$0	\$0
	\$0	\$0
Estimated Closing Costs		
Title Insurance	\$300	\$300
Escrow Fees	\$185	\$185
Home Warranty	\$350	\$350
Tax Stamp	\$0	\$0
Pest Inspection	\$50	\$50
Total Est. Closing Costs	\$6,762	\$6,840
Net To Seller	\$189,138	\$191,660

Email Presentation

To email the presentation, simply click on the **Email** link in the top right corner of the display window.



Note the new spell checker feature in the Compose E-mail window. In addition to the link, agents can type a message into the body of the email and add attachments (if necessary).

