CMA Wizard

The CMA Wizard guides you through each step of the CMA creation process. The CMA Wizard is accessed from the search results page using the icon located in the top right hand corner of the screen.

Alternately you can start a new CMA from the CMA tab by selecting the **Create New CMA** option. The two differences between this option and starting from a set of search results are: The property type will not be grayed out if starting from the navigation tab as the user has not yet conducted a search and secondly no comparable properties will be visible yet in step 3 of the CMA Wizard as once again a search has yet to be conducted. If starting from a listing search after selecting the comparable properties, the property type will have already been determined and the selected properties chosen will then be visible in step 3 as your comps.

CMA Wizard Steps

Getting Started (Step 1)

Select the **Type of CMA** you want to create from the available options, **Buyer** or **Seller**. You will be presented with a different set of reports depending on which type you select in future steps.

If you have begun the wizard from a listing search, the property type is already selected, if not, select a property type from the drop down list.

Next select a **Contact** you want to associate this CMA with from the list of saved Contacts you have in Fusion.

When you select a contact from the list the **Name of this CMA** will auto populate, this is an editable option.

If you place a check in the box next to **Use Client's home address as the Subject property**, the address of the selected Contact will transfer over to step 2, if that information was originally entered on the Contact record. This is not a required step.

After completed step 1 **Getting Started**, select the **Next Step** option at the bottom of the page. Selecting **Close** will close the page and all information will be lost including any comps you have selected in your listing search.

Once you select the **Next Step** option, your CMA will be saved and can be accessed in the **CMA Manager** for completion at a later time if needed.

Subject Property (Step 2)

In this step the user has multiple options to enter the **Subject Property** information by **Manually** entering the data, importing through a **Listing Search**, **Auto Populating** from a tax provider (i.e. Realist), or through a **Tax Search** (if integrated tax is part of the site).

Manual entry is done by typing the information in the available fields shown on the page.

Listing Search is done by selecting the **Listing Search** button at the bottom of the screen which will open a listing screen. Follow the instructions on the top of the page.

If the import is done from a **Listing Search**, the primary photo will appear in the photo slot on the ride hand side of the page, if one is found on the listing. This photo may be deleted or changed if desired. If no photo appears, one may be uploaded. In addition the property location will be mapped, this can be edited if the location is not correct or the property can be located.

Tax Search will open a tax search screen (integrated tax) and is not available to all accounts. Follow the same instructions as listed above for a **Listing Search**.

Tax Auto pop will allow the user to auto populate tax information for a third party tax provider that may be integrated into the site (i.e. Realist). Search by Address or Tax ID for the subject property, select the property when found, and then click the **Use the Selected Property** button at the bottom of the screen to auto populate the information into the subject property page.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Comparables (Step 3)

In this step the comparables will either appear in the grid (from the original search) or the opportunity to search for comparables will be presented if the grid is empty.

The same options presented in Step 2 are available to bring in comparable properties (if this was not done in the original search) by importing through a **Listing Search**, **Auto Populating** from a tax provider (i.e. Realist), or through a **Tax Search** (if integrated tax is part of the site).

The ability to view search results in a different grid view, see the property images (if present), map the properties, sort, and delete (from the tools dropdown) are presented as options in the header above the grid.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Adjustments (Step 4)

The adjustments screen enables you to enter price adjustments for each of your comparable properties. You are also given the ability to enter free form text for descriptions, add values, make adjustment, and add comments as needed. These functions are found at the bottom of the page.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Pricing (Step 5)

The pricing screen enables you to review the prices for all comparables, calculate a suggested price for the subject property based on different values or manually set a price and/or range for the subject property.

The CMA wizard provides several options for establishing a suggested price for your subject property:

- The suggested price can be based on your sold comparables with the average selling price being the default.
- The suggested price can be based on the high, low, median, or average price of your comparables. Additionally assessed tax value ratio and price per square foot may also be options.
- You can manually enter a suggested price.

To enter a suggested price manually:

1. Select **manually enter** from the drop-down list.
2. Type the suggested price in the **Suggested List Price** box.

Use the **Next Step** or **Previous Step** buttons to move from section to section, or click a step heading in the left navigation strip.

Report Pages (Step 6)

The reports screen enables you to set the appearance of your presentation and specify the reports that will appear in it. You can also manage your CMA presentation library and upload or create custom reports from the report screen.

If you already have a presentation template in your presentation library that you want to use, you can apply it from the Reports screen by selecting it from the CMA Presentation Template Drop down List.

To add a report page to your presentation:

From the Available Reports list click and drag the report from the available reports list to the selected reports list; move up or down as needed.

Three of the five options referenced below , Edit Report, Copy Report, and Create New Report are ONLY available if you are using the internet Explorer browser as they utilize the Report Manager to perform these functions which is ONLY compatible with Internet Explorer.

If using other browsers (Firefox, Safari, and Chrome), only the Preview Report and Upload PDF as New Report will be seen.

Uploading Custom Reports

If the CMA Wizard's available reports do not suit your needs, you can create custom reports or upload PDF documents to include in your presentations.

Uploading a PDF Document
Be sure that your PDF document does not exceed the size limit specified in the upload dialog.

To upload a PDF document to your CMA presentation:

1. From the CMA Wizard's Reports screen, click the **Upload PDF as New Report** button (and select **Upload PDF Report** to open the upload PDF dialog

1. Click the **Select a File** button to open a select file dialog.
2. Navigate to the file you want to upload.
3. Click the file to select it.
4. Click **Open**. The select file dialog will close and you will return to the upload PDF dialog.
5. Type a name in the **Report Name** box.

6. Select an option from the **Availability** list:
    - **Make this report exclusively for this CMA for…**
    - **Allow this report to be available for other CMA Presentations**
7. Click **Save** to upload the file.

To add or remove pages from your presentation:

Review the options under the Page Numbers drop down list.

To add background stationary to your presentation, select from the options available from the options in the drop down list next to the Stationary option. You can also preview the option by selecting the “paint brush” option.

To add or customize a footer for your presentation

Review the options under the Footer drop down list.

The footer can be edited using the editing tool (pencil and paper icon). This is a condensed version of the Report Manager function. NOTE: This condensed version is available to use with all browser types.

View/Email CMA (Step 7)

Select the desired option in which to share your presentation. NOTE: The checkbox allowing the CMA to be available on the Contact Website is only available to Fusion PRO users.

Additional Notes:

CMAs created in Fusion are displayed as PDFs, both to agents within Fusion as well as to clients to whom the reports are emailed

- Emailed CMAs are sent as a link to the PDF and do not include the PDF as an attachment
- The CMA Name is used as the text label of the report hyperlink

CMAs created in MLXchange or Tempo can be edited in Fusion but will be viewable only as PDFs from that point forward. An alert is displayed when the CMA is edited that this “conversion” will occur, and the agent can cancel instead if desired.

There is no visual distinction made between CMAs created in MLXchange and those created in Fusion in either the MLXchange CMA Manager or in the Fusion CMA Manager.

When a CMA is created or last saved in MLXchange or Tempo and the user attempts to view or edit it in Fusion from the CMA Manager:

They receive the following alert:

If they convert it then:

- The CMA will be displayed as a PDF to the agent while within Fusion, just as if the CMA had been created in Fusion.

- The CMA will be displayed as a PDF to the client, regardless of whether it was emailed to the client from Fusion or MLXchange, before or after the "conversion", or as an emailed link or posted on the AWP.
- The same exact set of reports that were included in the CMA in MLXchange will still be included (even a report like the Sellers Net Sheet which the agent cannot configure in Fusion will be included unless the agent removes it).

If they cancel then the CMA remains as-is and it is not opened in Fusion.

When a CMA is created or last saved in Fusion and the user attempts to open it in MLXchange, from either the CMA Manager or the "CMAs" tab of the associated Client's detail record:

They receive the following alert

If they click OK then:

- The CMA will be displayed via the usual MLXchange CMA viewer within the CMA Wizard to the agent, just as if it was created in MLXchange.

The CMA will be displayed via the usual MLXchange CMA viewer to the client, regardless of whether it was emailed to the client from Fusion or MLXchange, before or after the "conversion", or as an emailed link or posted on the AWP

- The same exact set of reports that were included in the CMA in Fusion will still be included

Any uploaded PDF reports included in the CMA will display as blank pages in that MLXchange CMA viewer, save for a brief message on the page that "This report can only be viewed when included in a PDF"

If the CMA is saved or printed in the Wizard via the "Save as PDF" button then any uploaded PDF reports included in the CMA *will* display, just as in Fusion.

If they cancel then the CMA remains as-is and it is not opened in MLXchange.

Presentation Library

Your presentation library is a collection of CMA presentation templates. You can access your library from the CMA Tab by clicking on the **CMA Presentations Library** option.

The column headers (i.e. **Property Type, Presentation Type**, etc.) enable you to filter the available presentations. You can use the library manager to add, edit, copy, and delete presentations.

Creating a New Presentation Template

<u>To create a new presentation template:</u>

1. From the **CMA Presentation Library** screen, click the **New CMA Presentation** button and the **Property Type.**
2. Click the **Create New Presentation** button to open the presentation editor.
3. Type a name in the **Presentation Name** box.
4. Type a report title in the **Description** box.
5. Select a theme for the presentation.

    - Select a theme from the **Stationery** list.
    - Click the **View Choices** button and select a theme from the palette.
6. Select a footer option from the **Footer selection** list.
    - Click the **Edit** button to edit the footer settings.
7. Select a **Page Numbers** option.
8. Select the reports to include in the presentation.
    - Click and drag reports from the **Available Reports** list to the **Selected Reports** list.
    - Click a report to select it and use the move right and move left buttons to move reports from one list to another.
    - Click the **All** button to move all reports from the **Available Reports** to the **Selected Reports** list.
    - Click the **Create/Upload Report** button to create or upload a custom report.
9. Click **Save**.

Copying a Presentation Template

<u>Copy a presentation template:</u>

1. From the CMA Presentation Library screen, select a presentation to copy and then select the copy button.
2. Rename the presentation, change as needed, then click save.

<u>Editing a Presentation template</u>

1. From the CMA Presentation Library screen, select a presentation to edit and then select the edit button.
2. Edit as needed, then click save.

<u>Delete a presentation template from your library:</u>

1. From the CMA Presentation Library screen, select a presentation to delete and then select the delete button.