

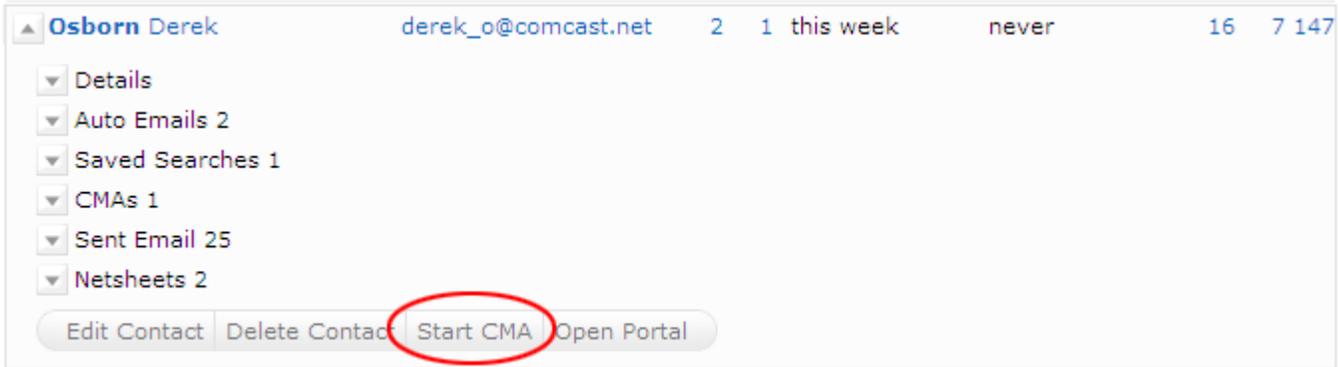
Creating a CMA

The CMA Wizard takes you step-by-step through creating a CMA. You may start from a Contact under My Matrix, or from your comparables search results.

a. Start Your CMA

From Contacts:

Click the My Matrix tab, then the Contacts link. Open the Contact for whom you want to create a CMA. Click the “Start CMA” button.



A screenshot of a contact profile for Derek Osborn. The contact information includes the name 'Osborn Derek', email 'derek_o@comcast.net', and various statistics like '2' and '1 this week'. Below the contact details is a list of items: Details, Auto Emails 2, Saved Searches 1, CMAs 1, Sent Email 25, and Netsheets 2. At the bottom, there are four buttons: 'Edit Contact', 'Delete Contact', 'Start CMA' (circled in red), and 'Open Portal'.

From Comparables Search Results:

Run a search for your comparables and select all the properties you want to include in your CMA. Click the blue CMA button at the bottom of your search results.

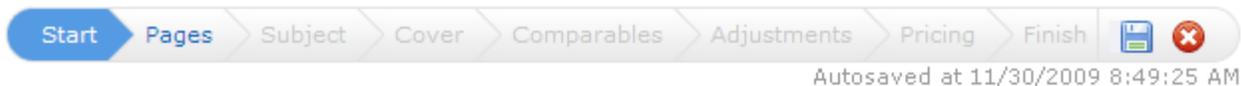
Previous · [Next](#) · **[1]** [2](#) [3](#) · [Top](#)

Cart: [Remove Checked](#)

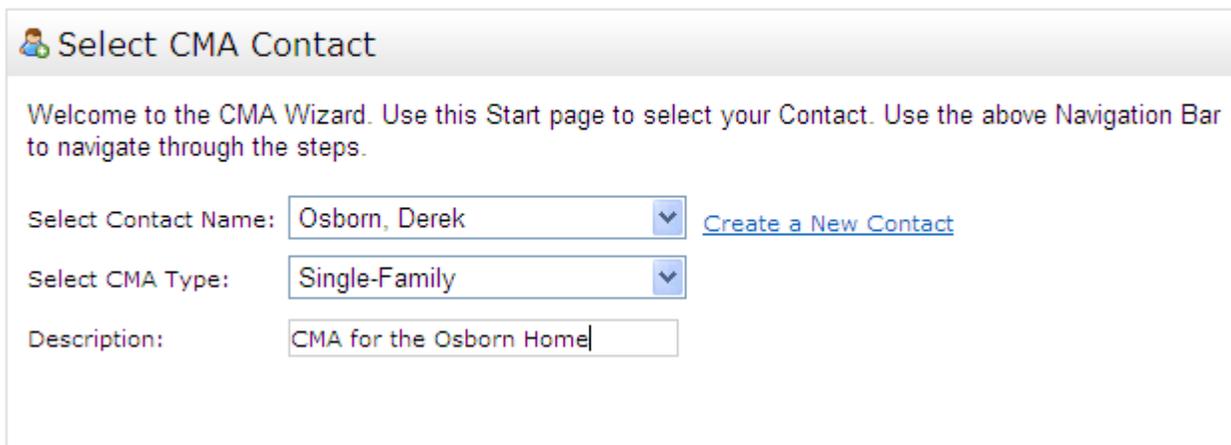


A screenshot of a search results toolbar. It contains several blue buttons: 'Save as', 'Sort', 'Reports', 'CMA' (circled in red), 'Print Friendly', 'Stats', 'Export', 'Email', 'Map', and 'Book a Showing'.

From the CMA Start screen, select the Contact Name, CMA Type and type in a CMA Description.



A screenshot of the CMA Wizard navigation bar. It shows a sequence of steps: Start, Pages, Subject, Cover, Comparables, Adjustments, Pricing, and Finish. The 'Start' step is highlighted in blue. Below the navigation bar, it says 'Autosaved at 11/30/2009 8:49:25 AM'.



A screenshot of the 'Select CMA Contact' screen. It features a navigation bar at the top with steps: Start, Pages, Subject, Cover, Comparables, Adjustments, Pricing, and Finish. Below the navigation bar, it says 'Autosaved at 11/30/2009 8:49:25 AM'. The main content area is titled 'Select CMA Contact' and contains the following text: 'Welcome to the CMA Wizard. Use this Start page to select your Contact. Use the above Navigation Bar to navigate through the steps.' Below this text are three input fields: 'Select Contact Name:' with a dropdown menu showing 'Osborn, Derek' and a link 'Create a New Contact'; 'Select CMA Type:' with a dropdown menu showing 'Single-Family'; and 'Description:' with a text input field containing 'CMA for the Osborn Home'.

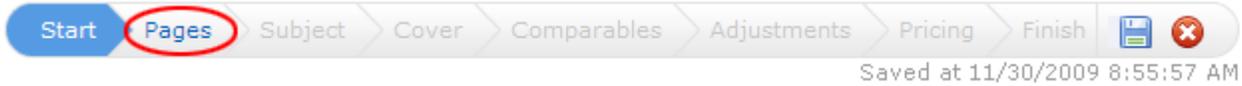
Save as you work!

The CMA will periodically auto-save your work. To manually save your work, especially if you plan to step away for a while, click the diskette icon on the right end of the CMA Wizard navigation bar.



b. Select Your CMA Pages

After completing the Start screen, click “Pages” to the right of Start on the CMA Wizard navigation bar.



Here you will select the pages you want to include in your CMA. They are organized into four categories: cover sheets, adjustments/subject, comparables/graphs, and static (standard pages that are always the same regardless of your data).

Click the plus sign + next to a category to open it and view the available pages. **To select an available page**, simply click once on the page name and it will appear in the Selected Pages box to the right.

To change the order of a page in the Selected Pages box, single click the page name, then click the blue up or down arrow on the right to move it.

To delete a page from the Selected Pages box, single click the page name, then click the red X on the right to delete it. To remove all selected pages at once, click the “Clear” link at the bottom right corner of the Selected Pages box.

If there is a core set of CMA pages that you usually select, you can **set those pages as the default** for that property type so that you don’t have to reselect them every time. After you have selected your core pages, click the “Set as Default” link at the bottom of the Selected Pages box. Now those pages will automatically be selected each time you create a CMA for that property type. You can still add or remove pages to tailor any CMA to a particular client. As you are adding and removing pages, you can revert to your default set at any time by clicking the “Restore Defaults” link.

Available Pages

- [-] Cover
 - Cover Sheet
- [-] Adjustments/Subject
 - CMA Summary List
 - CMA Price Adjustments
- [-] Comparables/Graphs
 - CMA Minimums and Maximums
 - CMA Comparables
 - CMA Table Summary of Solds
 - CMA Chart Days on Market
 - CMA Chart List and Sale Price
 - CMA Pricing Recommendations
- [-] Static
 - CMA Explanation
 - CMA Importance of Pricing
 - CMA Activity vs Timing
 - CMA Effect of Over Pricing
 - CMA Pitfalls of Overpricing

Selected Pages

- Cover Sheet
- CMA Summary List
- CMA Price Adjustments**
- CMA Minimums and Maximums
- CMA Comparables
- CMA Table Summary of Solds
- CMA Chart Days on Market
- CMA Chart List and Sale Price
- CMA Pricing Recommendations
- CMA Explanation
- CMA Importance of Pricing
- CMA Activity vs Timing
- CMA Steps to a Positive Showing

 [Set as Default](#)  [Restore Defaults](#)  [Clear](#)

c. Set the Subject Property

After selecting your pages, click "Subject" on the CMA Wizard navigation bar.

You have three options available for setting the Subject property information:

1. Type in the subject property fields manually;
2. Search the MLS for your subject property and then select it for auto-fill;
3. Type in the MLS number for your subject property to be auto-filled.

Subject Property

Matrix needs the details of the subject property. What would you like to do?

- [Type in the subject property fields manually](#)
- [Auto-fill subject property fields from a Single-Family listing](#)
- [Find a listing from its List Number:](#)

 **Subject Details**  [Fill from a Search](#)

Address

Street Address

City

Zip Code

School District

Features

Baths

Bedrooms

Fireplaces

Parking

Parking Desc.

Style

Exterior

Basement

Amenities

Roof

Water front

Dimensions

Abv Grnd Fin SF

Blw Grnd Fin SF

Foundation SF

Acres

Lot Size Dims

 **Property Photo**  [Clear Photo](#)



 Upload Photo:

 **Remarks**

An exceptional property just short steps to Lake Calhoun. Considered to be one Mpls's finest neighborhoods. Large expansive rooms, much updating of mechanicals! Dream kitchen, fresh decor, hardwood floors, finished lower level, bright sun rm-off, fenced yard!!

If you auto-fill your Subject property from an existing listing, the photo will automatically fill too. If you want to change the photo (or you are filling all the information in manually), click the "Browse" button in the Property Photo Box. Find the photo file on your computer and select it. Click the "Upload" button.

d. Format Your Cover Page

After completing all your Subject property information, click "Cover" on the CMA Wizard navigation bar. Note: If "Cover" is greyed out, you have not selected a Cover as one of your CMA Pages. Click "Pages" on the navigation bar to go back and select one.

Contact Information

As long as you selected a Contact for the CMA, the Contact information will automatically fill.

Contact Information

Name:

Address Line 1:

Address Line 2:

City / State / Zip:

Phone:

Agent Information

The Agent Information section does **not** auto-fill. This is so that you can set it however you want with variations from your Roster information. The first time you complete a CMA, enter your Agent Information how you want it to appear on all CMAs. Then click the link "Set as Defaults." From that point, your Agent Information will always auto-fill with your default information.

Agent Information [Set as Defaults](#)

Name:

Address Line 1:

Address Line 2:

City / State / Zip:

Phone:

Email:

Alternate Subject Photo

If you have uploaded a subject photo, it will automatically appear here. If you have a different subject photo that you want to use just for the Cover sheet, upload it here. Your original subject photo that you uploaded on the "Subject" screen will still be used on the interior CMA pages.

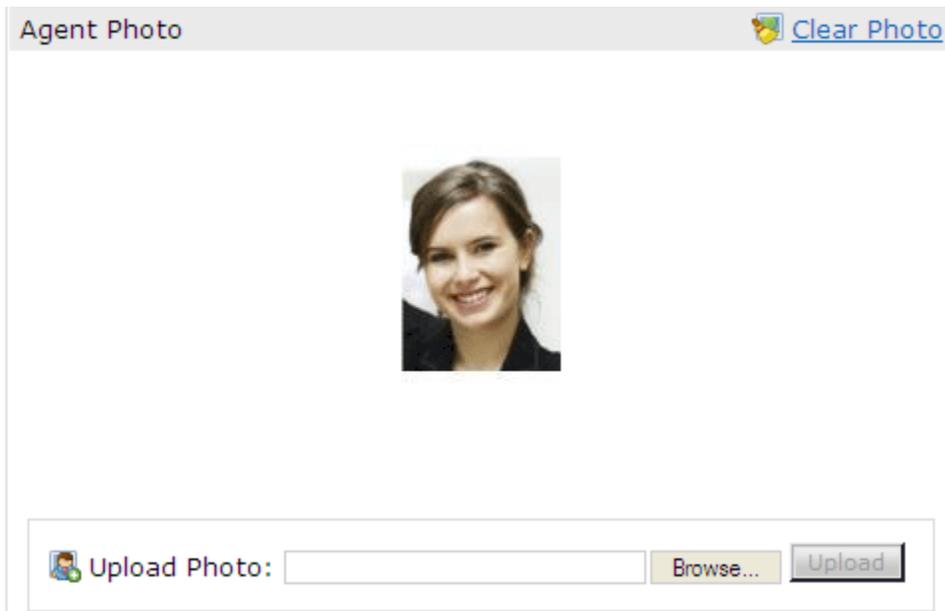
Alternative Subject Photo



Upload Photo:

Agent Photo (Optional)

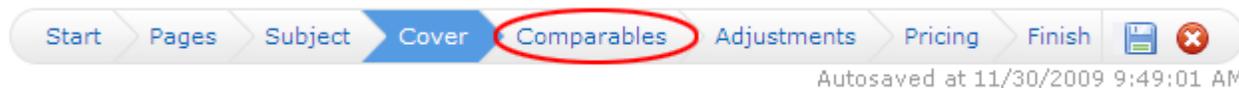
If you would like your photo or Broker Logo included on the Cover Page, upload it here. If you change your mind after uploading the photo, click the “Clear Photo” link.



The image shows a web interface for uploading an agent photo. At the top left, it says "Agent Photo" and at the top right, there is a "Clear Photo" link with a trash icon. In the center, there is a square placeholder for a photo, which currently shows a woman's face. Below the photo area, there is a form with a label "Upload Photo:" followed by a text input field, a "Browse..." button, and an "Upload" button.

e. Select/Edit Your Comparables

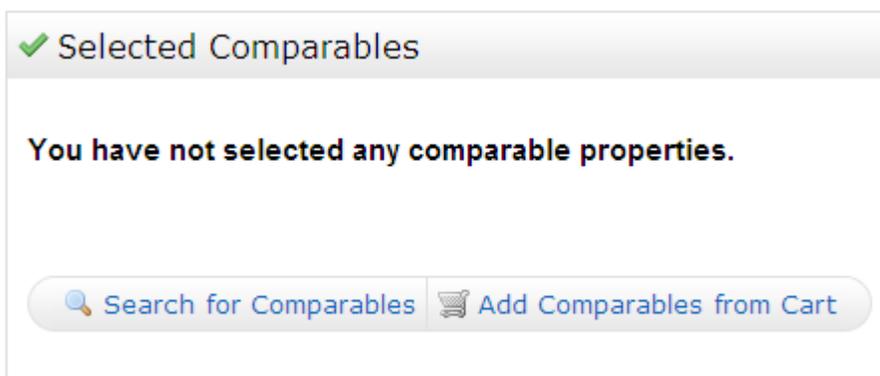
After completing your Cover Page set-up, click “Comparables” on the CMA Wizard navigation menu.



If you already selected your comparables before starting the CMA, they will be shown here and you will have the option to add more comparables or delete any you no longer want. Otherwise, you will select your comparables here from scratch.

To select comparables, you have two options: run a search or add from your Cart (if you already placed them there from an earlier search).

To run a search, click the “Search for Comparables” button.



The image shows a screen titled "Selected Comparables" with a green checkmark icon. Below the title, it says "You have not selected any comparable properties." At the bottom, there are two buttons: "Search for Comparables" with a magnifying glass icon and "Add Comparables from Cart" with a shopping cart icon.

Run your search like you would any Matrix search. In your search results, select all the properties you want to use as comparables, then click the “Add Selected” button at the bottom of the screen.

Revise Search **+ Add Selected**

Back at the Selected Comparables screen, you can:

Remove comparables by selecting them and clicking the “Remove Comparables” button.

Add more comparables by clicking either the “Search for Additional Comparables” or “Add Comparables from Cart” button.

X Remove Selected Search for Additional Comparables Add Comparables from Cart

f. Adjust Your Comparables (Optional)

If you choose to make adjustments to your comparables on any field, this is where you do it. After selecting all your comparables, click “Adjustments” on the CMA Wizard navigation bar.

Start Pages Subject Cover **Comparables** **Adjustments** Pricing Finish Autosaved at 11/30/2009 11:00:18 AM

Single Line Mode

When you go to Adjustments, it defaults to Single Line Mode. This allows you to set a value for any feature and have all of the comparables automatically adjust according to that setting.

For example, let’s say you have decided that you want to value Bathrooms at \$1,500. In the Feature Value box for Bathrooms, type in 1500 (do **not** add a + or – sign). In this example below, the Subject property (shown in bold at the top), has 2 bathrooms. The adjustments for each comparable all happen automatically when you type the number in the Feature Value. So properties with 2 bathrooms (like our Subject) have no adjustment because they are already comparable. Properties with only one bathroom are adjusted upwards \$1,500 to make them comparable with our Subject which has two. In one case, there is a comparable with 4 bathrooms. This is adjusted downward \$3,000 because it has 2 bathrooms more than our Subject.

Adjustment Details

| | Status | Price | Adjusted Price | # Baths |
|-------------------------------------|--------|---------|----------------|--------------|
| Feature Value | | | | 1,500 |
| 1234 Main Street SW | | | | 2 |
| 711 24th Ave N | Sold | 17,500 | 19,000 | 1 1,500 |
| 3031 Grand Ave S | Sold | 29,900 | 29,900 | 2 0 |
| 2606 2nd Ave S | Sold | 89,000 | 90,500 | 1 1,500 |
| 3255 Pleasant Ave S | Sold | 89,900 | 89,900 | 2 0 |
| 915 W 36th St | Sold | 99,900 | 101,400 | 1 1,500 |
| 415 Queen Ave N | Sold | 99,900 | 99,900 | 2 0 |
| 520 Logan Ave N | Sold | 110,000 | 107,000 | 4 (3,000) |

Continue this down the line for whichever fields you want to make adjustments on. Use your Tab key to move from one field to the next, or use the navigation buttons at the bottom:



Detail Mode

If you prefer to make your adjustments in Detail Mode, click the “View in Detail Mode” link at the top right of the screen.

Detail Mode works like the previous version of Matrix CMA. You make your adjustments manually for each field for each comparable property, one property at a time.

Adjustment Details [View in Single Line Mode](#)

<-Previous **Comparable 1 of 20** Next->

| Field | Subject Property | Adjusting Property | Adjustment |
|-----------------|--|--|------------|
| |  1234 Main Street SW |  711 24th Ave N | |
| Status | | Sold | |
| School District | Minneapolis | Minneapolis | |
| # Baths | 2 | 1 | 1,500 |
| # Bedrooms | 3 | 3 | |
| # Fireplaces | 1 | 0 | |
| # Parking | 0 | 0 | |
| Parking Desc. | None | None | |
| Style | (SF) Two Stories | (SF) Two Stories | |
| Exterior | Shakes, Stucco | Stucco, Wood | |
| Basement | Full, Walkout | Full | |
| Amenities | Hardwood Floors, Kitchen Window, Natural Woodwork | | |

Click the “Next” and “Previous” buttons to move ahead or back among your comparable properties. If you want to switch back to Single Line Mode at any time, click the “View in Single Line Mode” link.

g. Make Your Pricing Recommendations (Optional)

If you want to add Pricing recommendations to your CMA, this is where you do it. Note: If the Pricing option is greyed out, it is because you did not select the “Pricing Recommendations” page. Go back to the “Pages” section and select this page, then you can click “Pricing” on the CMA Wizard navigation bar.



Summary

This informational table will be included in your Pricing Recommendation. It compares your Comparable prices with the adjusted prices (if you made any adjustments).

| | Low | Median | Average | High | Count |
|---------------------------|--------|---------|---------|---------|-------|
| Comparable Price | 17,500 | 104,950 | 110,205 | 190,000 | 20 |
| Adjusted Comparable Price | 20,500 | 104,200 | 110,780 | 190,000 | 20 |

Suggested List Price

Matrix will not make a price recommendation for you. This requires your analysis based on your experience and combining all factors that may or may not be included in the CMA. This is a free-form box that allows you to enter whatever you wish, such as a price or price range, including explanation. Or you may leave this space blank and write the price in by hand when you meet with the client.

\$ Suggested List Price

Based on this analysis of similar home sales in your area, I recommend that we list your house in the range \$300,000 to \$330,000. This will give you the best chance of getting a fair market price within your goal of selling within three months.

Notes

Enter any additional comments you want to appear with the suggested price.

Notes

Enter any additional comments which should appear with the price.

h. Finish (View, Print and Email)

When you are ready to view, print and/or email your CMA, click "Finish" on the CMA Wizard navigation bar.



Autosaved at 11/30/2009 1:38:28 PM



CMA Summary



View CMA



Email CMA

Selected Pages

Cover Sheet
 CMA Summary List
 CMA Price Adjustments
 CMA Minimums and Maximums
 CMA Comparables
 CMA Table Summary of Solds
 CMA Chart Days on Market
 CMA Chart List and Sale Price
 CMA Pricing Recommendations
 CMA Explanation
 CMA Importance of Pricing
 CMA Activity vs Timing
 CMA Steps to a Positive Showing

Counts of Comparable Properties

Sold:15

Subject Details

Prepared For: Derek Osborn**Subject Property:** 1234 Main Street SW

Subject Photo



In addition to summaries of selected pages, comparable properties count, client name, subject photo/address, you also have the option to View or Email your CMA. **To run your CMA report and view it** in PDF format, click the “View CMA” button in the upper left corner. Once the CMA is opened in a new window in PDF format, you may **print it by selecting File>>Print from the Adobe PDF menu bar**.

To email a link to the CMA Report to your client, click the “Email CMA” button, fill out the email form and then click the “Send link”.

If you have set up a team in your Matrix settings, you will have the option to print/email the CMA as yourself or on behalf of your team (such as in the example below).

CMA Summary

 Print as “Team Wexley/Draper”. Print as “Diana Draper”.

View CMA



Email CMA

To retrieve a saved CMA at a later date, click the “My Matrix” tab. You can either click “CMAs” to get your full list of Saved CMAs, or click “Contacts” and open the CMAs just for a particular client. When you find the CMA you want, click the button to open the CMA Wizard, view the CMA (run it as a PDF), email the CMA or delete it.

Open CMA Wizard

View CMA

Email CMA

Delete CMA