How To Create a CMA Report
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1  **CMA**

You have the ability to create a full CMA package that includes not only comparable properties, plus an array of reports that you can customize to fit your needs.

To begin a CMA, you must first conduct a search of properties, using statuses, date ranges, etc., that allow you to come up with a comparable price for the subject property. After selecting the properties you wish to include in the CMA, click on the down arrow next the Print button, and then select **CMA Package** form the menu.

The **New CMA Package** window will appear, enter a name for your CMA and then click on **Continue**

2  **Creating a New CMA**

rDesk CMA allows you to create a comprehensive market analysis for your customers. There are ten steps to create a new CMA. To move to the next step, either click the next tab or use the **Next** button.
2.1 Start
1. Click Marketing>CMA; the CMA Start Tab page appears and a list of existing CMAs displays.

![Comparable Market Analysis](image)

2. Click Create New CMA...; the Create a new CMA dialog box appears.
3. Enter a name for the CMA. This is the file name for the CMA when it is archived in your rDesk Web Documents folder.
4. To select comparable properties from the MLS, select by connecting to the MLS.
5. To manually enter comparable property data, select from scratch.
6. Click Create; the Subject Property Information Tab page appears.
2.2 Summary

The Search Summary information is displayed on the Summary Information Tab page in the view (Map or List) selected in the previous step. To switch views, click the tab for the alternate view.

<table>
<thead>
<tr>
<th>MLS#</th>
<th>Address</th>
<th>Status</th>
<th>Bed</th>
<th>Bath</th>
<th>Sq Ft</th>
<th>Lot Sz</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>V09133647</td>
<td>2306 West PALOS VERDES Drive</td>
<td>Active</td>
<td>3</td>
<td>2</td>
<td>1841</td>
<td>1141</td>
<td>90274</td>
</tr>
<tr>
<td>S09130084</td>
<td>2305 PALOS VERDES Drive</td>
<td>Active</td>
<td>3</td>
<td>2</td>
<td>1609</td>
<td>1141</td>
<td>90274</td>
</tr>
<tr>
<td>09993145</td>
<td>26452 BASWOOD Avenue</td>
<td>Active</td>
<td>3</td>
<td>2</td>
<td>1735</td>
<td>7440</td>
<td>90275</td>
</tr>
</tbody>
</table>

2.2.1 View of Search Result

- A column may be moved by clicking the column header and moving the column left or right to the desired location. Red arrows indicate where a column header may be dropped.
- A column may be sorted by clicking the column header and moving it to the sort bar above the header.
- An individual line may be moved up or down by clicking anywhere in the line and moving it.
- In Filter by Property Status, select the status by which to filter the search results.
- Click Summary Stats to display a recap of the summary statistics for the selected listings.
- Check individual listings to include in the CMA; alternately, click select all or unselect all.
2.2.2 Map View

Map View Controls:

- Map Controls can be hidden or displayed.
- View options are Road and Aerial.
- Click Labels to include or remove road labels from the Aerial map.
- Use the Zoom In, Zoom Out and Pan controls to manage the map view.
- In Filter by Property Status, select the status by which to filter the search results.
- Click Summary Stats to display a recap of the summary statistics for the selected listings.
- Use the map legend to identify the status of search result listings on the map.
- Click select all to include all listings in the CMA; click unselect all to deselect all of the listings on the map.
- Hover the mouse over the listing icon to display the Listing details.
- In the listing details, click Bird’s Eye View to see a bird’s eye view of the listing.
- In the listing details, click View/Edit Details to see the details of the listing and them as necessary.
- Check Include to include the listing in the CMA.
- For locations with multiple listings, click Next to see the next listing at the same location.
2.3 Subject Property

1. Identify the subject property for the CMA.

2. The Report name is the file name you entered in Step One.
3. Enter the name of the client.
4. Enter the subject property address information.
5. Enter information about the subject property.
6. Click Here to change photo to change the subject property photo.
7. Enter any notes for the subject property.

2.4 Edit the Selected Listings

The selected listings can be viewed and the listing details can be edited on the Edit Tab page.

- From the drop down menu, select the listing to view and/or edit.
- Click Map to view the points of interest map for the selected listing.
- Click Here to change photo to change the photo for the selected listing.
- Click Add Listing... to add another listing to the CMA.
Click **Apply Changes** to save the edited information.

Click **Adjustments...** to make price adjustments to the selected listings.
- Make the adjustments and click **Apply Changes** to save the adjustments
- Click **Edit Listing...** to return to the Edit Tab page.

### 2.5 Net Sheet

The Seller’s Net Sheet is used to calculate the seller’s costs and the net cash amount to be received by the seller.

The formulas used are determined in Agent Setup.
2.5.1 How to Edit Netsheet Formulas

- Click **Edit Formulas...**; the Net Sheet Formulas page appears.
- Make any necessary changes to the formula(s) in the Equation(s).
- Click **Apply Changes**.
- Click **Recalculate** to recalculate the results.
- Click **Return to NetSheet**.
- Click **Recalculate Formulas** to apply the edited formula(s).

2.5.2 How to Add Encumbrances

Add any encumbrances and recalculate the net cash to the seller.

<table>
<thead>
<tr>
<th>Encumbrances:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encumbrances are any claims against a property, such as a mortgage or a lien.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Remove</th>
<th>First/Last</th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Remove</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

- Enter a description for the encumbrance.
- Enter the amount of the encumbrance in both the Low and the High scenario columns.
- Click **Recalculate Totals** to see the adjusted net cash amount.

2.5.3 How to Add Closing Costs

The items listed in closing costs are determined in Agent Setup. Enter the amounts in both the low and the high scenario columns.

<table>
<thead>
<tr>
<th>Closing Costs:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing Costs are any fees paid at the closing of the sale.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Remove</th>
<th>Commissions</th>
<th>Change</th>
<th>Low</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>Escrow Fees</td>
<td>Change</td>
<td>9,310</td>
<td>10,500</td>
</tr>
<tr>
<td>Remove</td>
<td>Home Warranty</td>
<td>Change</td>
<td>512</td>
<td>535</td>
</tr>
<tr>
<td>Remove</td>
<td>Other Work</td>
<td>Change</td>
<td>350</td>
<td>350</td>
</tr>
<tr>
<td>Remove</td>
<td>Pest Inspection</td>
<td>Change</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Remove</td>
<td>Tax Stamp</td>
<td>Change</td>
<td>50</td>
<td>50</td>
</tr>
<tr>
<td>Remove</td>
<td>Termite Work</td>
<td>Change</td>
<td>373</td>
<td>399</td>
</tr>
<tr>
<td>Remove</td>
<td>Title Insurance</td>
<td>Change</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Remove</td>
<td></td>
<td></td>
<td>1,935</td>
<td>2,050</td>
</tr>
</tbody>
</table>
2.5.4 How to Remove a Netsheet Item

- Click Change to replace the item. Select another item from the list and click Select.
- Click to apply the changes and calculate the Total Estimated Closing Costs.

Recalculate Totals

2.6 Smart Price

To determine the Suggested List Price for your subject property, Smart Price suggests price ranges based on the sold prices of the comparable used in the CMA.

NOTE: To use Smart Price to calculate the price range, total square feet for the subject property must be entered on the Subject Property Tab page.

- Click the link for the Sold price (Low, High, Average, Median) you want to use; the Suggested List Price is adjusted accordingly.
- Click Use Price Range to enter a percentage to be used to calculate an amount above or below the Suggested List Price.
2.7 Planner

The Marketing Planner Tab page assists you in scheduling events related to the marketing of the subject property. Enter the listing date and the related tasks are scheduled accordingly.

- In **Set the listing date**, enter the date.
- Alternately, click the calendar; a calendar displays. Select the date and click **OK**.
- Click **Apply**. The dates for the tasks in the list adjust to the newly selected listing date.
2.7.1 To add a new task:

- Click **Add New Task...**; the Create Task Tab page appears.
- In **Task Name**, enter the name of the task to add.
- Alternately, click **Change Item** to select a task from the task list.
- To add a new task to the task list, click **Edit List**, the Planner Help window appears.
- Enter the name of the new task and click **Add**.
- Click **OK**.
- Select the day to perform the task.
- Click **Add Task**; the added task appears in the Marketing Planner.

2.7.2 To edit a task on the Market Planner Tab page:

<table>
<thead>
<tr>
<th>Date</th>
<th>Task Name</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/8/2010</td>
<td>Sign And Complete Listing Papers</td>
<td></td>
</tr>
</tbody>
</table>

- Click **Sel** (Select) for the task to edit. The selected task line is highlighted in yellow.
- Click **Edit Selected...**; the Edit Task Tab page appears. To edit the task, follow instructions in **To add a task** above.

2.7.3 To delete a task on the Market Planner Tab page:

- Click **Sel** (Select) for the task to delete. The selected task line is highlighted in yellow.
- Click **Remove Selected**.

To mark a task completed, check **Completed**.
To return to the default list of tasks, click. **Restore Default**

2.8 Options

The Options Tab page allows you to customize the format and content of your CMA.

- In **Current Theme**, select the theme for the CMA.
- Check the reports to include in the CMA.
- Click **Select All** to include all listed reports.
- Click **Unselect All** to uncheck all selected reports.
- Click **Select Recommended Defaults** to select the default reports.
- Check individual reports to be included.
• Click [Preview/Print] to see a preview of the CMA prior to printing it.

• Click [Print] to print the CMA.
• Click Email to email a PDF file of the CMA.
• Select the scale for the map for each listing and for the cumulative listings map.
• Click Add Your Own Reports to add additional reports to the CMA. The My Reports Tab page of the Agent Setup appears. Click Return to Reports to return to the CMA.

Report colors can only be changed if using the Classic theme. For all other themes, the report colors options are hidden.

*If using the Classic theme:*

• Choose the report colors.
• Click Edit Customer Colors to change the report colors.

Saved CMAs are archived in your Web Documents; click Tools>Web Documents>My CMAs.

3 Agent Setup
To set up Agent Preferences, on the start page, click Marketing>CMA; the CMA Start Tab page appears.

In the Agent Setup section of the page, click Agent Setup…

The first four tabs include pre-written documents that can automatically be included in your CMA or BT presentation. You should review and edit these documents. At the point when you finalize the options for an individual report, you can choose to include or exclude any of these documents.

3.1 Letter
The first of the Agent Setup Tabs is **Letter**. It contains a letter to clients that can be included in a report.

1. Edit the letter if desired. Click **Apply Changes** to save the edits.
2. Click **Restore Default** to revert to the original letter.
3. Click **Return to Start** to return to the Start Tab page.

### 3.2 Story

Click the **Story** Tab to view the pre-written company story page that can be included in the report.

1. Edit as desired. Click **Apply Changes** to save the edits.
2. Click **Restore Default** to revert to the Start Tab page.
3. Click **Return to Start** to return to the Start Tab page.

### 3.3 Explanation

Click the **Explanation** Tab to view the pre-written explanation and disclaimer that can be added to the report.

1. Edit as desired. Click **Apply Changes** to save the edits.
2. Click **Restore Default** to revert to the Start Tab page.
3. Click **Return to Start** to return to the Start Tab page.

### 3.4 Resume

Click the **Resume** Tab to add a resume that can be included in the report.

1. Add information in each of the sections of the resume. Sections are:
   - Experience
   - Educations
   - Associations
   - Personal
2. Click **Restore Default** to revert to the Start Tab page.
3. Click \textbf{Return to Start} to return to the Start Tab page.

3.5 Net sheet

Click the \textbf{Netsheet Tab} to add or edit formulas or costs used to calculate the net profit to the sellers. Although changes made apply to all future CMA reports, the values can be edited in each individual CMA.

Once you’ve determined the selling price for the subject property, the formulas and the costs are used to calculate the amount to be deducted from the profit.

To set the formulas and costs:

1. Make any changes to the existing formulas or costs.
2. In \textbf{Items}, add the title for any additional formulas or costs;
3. In \textbf{Equations} enter the equation to be used in any additional formulas.
4. Click \textbf{Apply Changes} to retain additional cost items or formulas.
5. Click \textbf{Recalculate} to see the results of changes made in formulas.
6. Click \textbf{Restore Default} to remove any changes or additions made and reverts to the original formulas and costs.
7. Click \textbf{Return to Start} to return to the Start Tab page.

\textbf{Commissions}

In the example provided, the percentage rate used to calculate the commission amount is 7%, with the assumed selling price of $1,000. This results in a $7,000 commission cost.
To calculate the amount of commission for a 6% commission rate, change the percentage rate to .06 and click Recalculate. The commission amount is now changed to $6,000.

<table>
<thead>
<tr>
<th>NetSheet Formulas</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Price] is a variable that can be used in any equation. Its value is set to 100,000 for the examples below. [E1] through [E25] are variables that can also be referenced in other formulas.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Items</th>
<th>Equations</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove Commissions</td>
<td>[Price]*.06</td>
<td>6,000</td>
</tr>
</tbody>
</table>

**3.6 Costs**

Add or edit formulas or costs used to calculate the net cost to buyers. Changes made apply to all future Buyer’s Tour reports although the values can be edited for each BT. The features and functions are the same as those used in Netsheet.

1. Make any changes to the existing formulas or costs.
2. Add additional formulas or costs.
3. Click Apply Changes.
4. Click Recalculate to see the results of your changes or additions.

**3.7 Colors**

Colors can only be changed for the Classic theme reports.

<table>
<thead>
<tr>
<th>Color</th>
<th>Pick</th>
<th>Hexadecimal</th>
<th>RGB</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>Change...</td>
<td>#0000FF</td>
<td>0 0 255</td>
<td>Color used most often</td>
</tr>
<tr>
<td>Secondary</td>
<td>Change...</td>
<td>#FF00FF</td>
<td>255 0 255</td>
<td>Color used frequently</td>
</tr>
<tr>
<td>Tertiary</td>
<td>Change...</td>
<td>#66FFFF</td>
<td>102 255 255</td>
<td>Color used as accent</td>
</tr>
</tbody>
</table>
Select the colors for the Classic theme report. Primary (colors used most often), Secondary (colors used frequently) and Tertiary (colors used as accents) colors can be changed in three ways:

1. Pick the color – Click Change; the Color Picker window displays. Select the color.
2. Hexadecimal – Enter the color number and click Set.
3. RGB – Enter the RGB color numbers and click Set.
4. Click Apply to apply the color selections.
5. Click Return to Start to return to the Start Tab page.

3.8 My Reports
You can add additional pages to a CMA or BT.

3.8.1 To add a new page:
1. Browse to find the page on your computer to upload.
2. Click Upload.

Formats that are supported in rDesk are: .doc, jpeg and pdf.

3.8.2 To delete a report:
In Edit Your Current Reports, from the drop down menu, select the Report Type to edit; a list of available reports displays.

1. Check the report to delete and click Remove.

Click Return to Start to return to the Start Tab page.