Using the MLXchange 2.0 CMA Manager

Contents

All-New MLXchange 2.0 CMA Manager

MLXchange's Comparative Market Analysis (CMA) feature lets you create attractive, graphical reports that compare a seller's property with comparable properties, showing price adjustments and a variety of calculated values, such as average prices and estimated net proceeds. Presentations can also be created for your buyers, and all reports can be quickly and easily e-mailed to your clients.

New features include:

- Multiple ways to calculate the Suggested Price
- Add comparable properties from the MLS, integrated tax records, or manually
- Make side-by-side adjustments to any type of comparable property
- Edit and save comparable property information; save original search criteria
- Flexible Net Sheets and Closing Costs worksheets
- Easy-to-use online report editor

Additional Reference Material Available:

- An online tutorial on how to use the new CMA Manager is available in the Support section on www.Interealty.com.
- Handy quick reference sheets are included at the end of this guide.

Making New CMAs

To make a new CMA:

1. Click the **CMA** menu item near the top of the screen. The CMA Manager page appears. The CMA Manager shows a list of all CMAs and presentations that you have created. Refer to the section "Working with the CMA Manager" for more information on using this page.
2. Click **New CMA**. The Create a New CMA Presentation page appears. You can also place the mouse pointer over the **CMA** menu and select the **New CMA** menu item to access this window directly.
3. Select the **Type of CMA**: **Buyer** or **Seller**. (For the purposes of this tutorial, this section will focus on making a Seller CMA.)
4. Select the **Property Type** for the CMA from the list.

5. Select a **Client** to associate with the CMA. If the client has not yet been added to your Client Manager, click **Add a new client**.

   Be sure to select the correct CMA Type, Client, and Property Type because you cannot change these values later.

6. Select the **CMA presentation** template you want to use from the list.

7. Enter a **Presentation Name**.

8. If appropriate, select **Use client's home address as subject property**. This option automatically copies the property information from the Client Record to the new CMA. Once you have created the new CMA, you will also have the option of adding Subject Property information directly from an MLS or Tax search (where available).

9. Click **Next**. The main CMA page appears, and then the program automatically launches the Search Criteria page in a pop-up window so you can immediately add comparables properties to the CMA.

10. As described in the Search Manager section, enter your search criteria and click **Results**. The Search Results page appears.

11. Select the comparable properties that you want to use and click **Add selected records to CMA**. The window closes and the main CMA page reappears.

12. Click **Back** to return to the CMA Manager page where the new CMA will appear in the list.

Tip: Create a search template just for CMA searches. Having your own custom CMA search template that contains only the fields that you use when searching for comparables will save you time!

Working with Comparable Properties

The main CMA page shows a list of comparable properties. The list can be sorted, filtered, and resized similar to the standard Search Results list.

To add comparables from an MLS or tax search:

1. On the main CMA page, select **MLS Search** or **Tax Search** (if available) from the Comparables list and click the arrow button. The Search Criteria page appears.

2. As described in the Search Manager section, enter your search criteria and click **Results**. The Search Results page appears.

3. Select the comparable properties that you want to use and click **Add selected records to CMA**. The window closes and the main CMA page reappears, showing the list of selected comparable properties.

To manually add comparables:

1. On the main CMA page, select **Add New** from the Comparables list and click the arrow button. The Edit CMA Property window appears.
2. Enter as much information as possible in the fields provided. If some fields are not visible, select **All Fields** from the list at the top of the page.

3. To upload a photo for the comparable, click **Add photo**. The CMA Image Upload window appears. Click **Browse**, locate and select the image file you want to use, and click **Open**. If you are satisfied with the displayed image, click **Save** to upload the picture.

4. If the program is unable to determine (or has incorrectly determined) the property's location on a map based on the address you entered, click **Set Map Location**. The Set Map Location window appears.

5. Click **OK** to save the location and return to the main Edit CMA Property window.

6. Click **Save** to save the comparable property information; if you want to discard your edits and make new changes, click **Reset**.

7. Click **Close** to return to the main CMA page.

To edit a comparable:

1. On the main CMA page, select the comparable in the list that you want to edit.

2. Select **Edit** from the Comparables list and click the arrow button. The Edit CMA Property window appears (see above).

3. If you are editing the comparable because its price of status has changed, select **Status Change** or **Price Change** from the list. Only the fields necessary to make status or price changes are now displayed, making it quicker and easier for you to make these kinds of changes.

4. Make changes to the property information as required.

5. Click **Save** to save the comparable property information; if you want to discard your edits and make new changes, click **Reset**.

6. To edit another comparable property, click the left/right arrow buttons at the bottom of the window, or select a property from the list to jump to it directly.

7. Click **Close** to return to the main CMA page.

To delete comparables:

1. On the main CMA page, select the comparables in the list that you want to delete.

2. Select **Delete** from the Comparables list and click the arrow button.

3. Click **OK** to confirm the deletion.

To make adjustments to comparables:

1. On the main CMA page, click **Adjustments**. The CMA Comparables page appears.

2. Enter the **Adjustment Description**s and **Amount**s in the fields provided. If an amount is meant to reduce the **Adjusted List Price** of the comparable property, make sure you put a minus sign (“**-**”) in front of the amount.

3. Add any **Additional Comments** for the comparable that you want to show up in the finished CMA report.

4. To make price adjustments to other comparable properties, click the left/right arrow buttons at the bottom of the window, or select a property from the list to jump to it directly.

5. To edit the Subject Property or the displayed comparable property, click **Edit**. The Edit CMA Property window appears (see above for more information).

6. When you have finished making adjustments, click **Close** to return to the main CMA page.

Adding Subject Property Information

To add subject property information:

1. On the main CMA page, click **Subject Property** to add, edit or search for the subject property. The Edit CMA Property window appears. This same window is also used for editing comparable property information. If you selected **Use client's home address as subject property** when creating the CMA, some of the fields may already contain information.

2. If the subject property has a recent listing record in the MLS database, select **MLS Search** from the **Add Subject** list and click the arrow button. If the subject property does not have an listing record in the MLS database, select **Tax Search** from the **Add Subject** list (if available) and click the arrow button.

3. The Search Criteria window appears. As described in the Search Manager section, enter your search criteria and click **Results**. The Search Results page appears.

4. Select the tax or listing record you want to use for the Subject Property information and then click **Use Selected Record as CMA Subject**. The window closes and the Edit CMA Property window reappears, showing a copy of the selected record's information.

5. Make any changes or additions to the subject property information as required. The information you enter here is used in various locations in the CMA, so it is important that you enter as much information as possible.

   Note: Although it is possible to get Subject Property information through an MLS or tax record search, changes to the subject property information will NOT affect the listing or tax record itself. Adding subject property information through an MLS or tax search makes a copy of the information that can then be edited independently.

6. If a property photo does not yet exist, click **Add photo**. The CMA Image Upload window appears. Click **Browse**, locate and select the image file you want to use, and click **Open**. If you are satisfied with the displayed image, click **Save** to upload the picture.

7. If the program is unable to determine (or has incorrectly determined) the property's location on a map, click **Set Map Location**. The Set Map Location window appears.

8. Use the controls to pan and zoom the map view until you find where the property is located, then click on the map to set its location. Alternatively, you can enter the property's **Latitude** and **Longitude** if you know it.

9. Click **OK** to save the location and return to the main Edit CMA Property window.

10. Click **Save** to save the Subject Property information; if you want to discard your edits and make new changes, click **Reset**.

11. Click **Close** to return to the main CMA page.

Determining the Suggested Price

To determine the suggested price of the subject property:

1. On the main CMA page, click **Suggested Price**. The CMA Suggested Price window appears.

2. If you want to manually enter your own suggested price, select **Use manually entered price** and then enter the **Suggested Price** or the **Suggested Price Range**.

3. If you want to calculate the suggested price, choose whether you want to base it on the **Selling Price**, the **Price Per Square Foot**, or the **Tax Value Ratio**. Within the chosen section, select if you want to use the **High** value, the **Low value**, the **Median** (i.e., middle) value, or an average calculation of all the values.

4. Click **Save** to save your selections and return to the main CMA page.

Estimating Net Proceeds and Closing Costs

To estimate net proceeds or closing costs:

1. If you want the CMA to include a statement of buyer closing costs or the proceeds your seller can expect from the sale of their property, click **Estimated Net Proceeds** or **Estimated Closing Costs** on the main CMA page. The Net Sheet Information window appears.

   If you are preparing a Buyer Presentation, this window will appear slightly different. Instead of calculating net proceeds from the sale, this page will calculate the total Closing Costs the buyer will have to pay.

2. Enter the seller or buyer's financial information in the fields in the upper part of the screen. The **Estimated Sale Price** is the same as your Suggested Sale Price.

3. The list of Settlement Charges or Closing Costs should show all of the hypothetical transaction details, including all of the seller or buyer-paid fees and closing costs. To quickly add a list of standard seller or buyer expenses, click **Apply Defaults**. (To set up your list of default settlement charges, click **Edit Defaults**. Add default charges in the same was as described below and click **Close** when you are finished.)

4. Click **New Charge** to add an expense that is not yet listed. The Add Expense window appears.

5. Enter a **Description** of the expense. Enter the value of the expense as a **Fixed Dollar Amount** plus/or as a percentage (**%**) of the **Sale Price** or some other amount. Click **OK** to return to the Net Sheet Information and add the new charge to the list.

   NOTE! *You can also use the Add Expense window to create headings or blank lines in the list of charges. To create a heading, enter just a* ***Description****; to make a blank line, enter nothing and click* ***OK****.*

6. To change the order of expenses in the list (which is also the order in which they will be printed), select the expense you want to move and click the up and down arrow buttons.

7. To modify an existing expense, select it and click **Modify**.

8. To delete an expense, select it and click **Delete**.

9. Click **Close** to return to the main CMA page.

Previewing and Printing CMAs

You can print CMAs from either the CMA Manager page or the main CMA page.

To preview and print a CMA:

1. From the main CMA page, click **Report**. The CMA Report Preview window appears.

2. To preview different pages, click the left/right arrow buttons at the bottom of the window, or select a page from the list to jump to it directly.

3. If you want to create the CMA presentation using a different presentation template, click **Select a different CMA presentation**. The Select CMA Presentation dialog box appears. Select the presentation template that you want to use from the list then click **OK**.

4. To quickly remove the report you are currently viewing from the CMA presentation, click **Remove Report**.

5. If you want to add, remove and/or change the order of the pages in the CMA presentation, click **Add and Reorder Reports**. The CMA Presentation Report Selection window appears.

6. Select the report(s) that you want to appear in the presentation from the **Available reports** list and move them to the **Selected reports** list by clicking the left arrow. To select more than one report at a time, hold down the CTRL or SHIFT key while clicking.

7. To remove a report, select the unwanted report from the **Selected reports** list and click the right arrow.

8. Change the position of the **Selected reports** by selecting each report and clicking the up/down arrows. The order of the selected reports determines the order in which they will be displayed in the CMA presentation.

9. When you are satisfied with the list of selected reports, click **Save** to return to the CMA Report Preview window.

   NOTE! *Adding, removing, and changing the order of the reports in this way does NOT change the presentation template, only this particular CMA presentation.*

10. To print the CMA report, click **Print**. A standard Windows Print dialog box appears. Choose any additional report options (e.g., number of copies, destination printer, etc.) and click **Print**.

11. Click **Close** to close the CMA Report Preview window and return to the main CMA page.

E-mailing CMAs

When you send a CMA or buyer presentation to a client via e-mail, you are actually sending a link to an online report.

To e-mail a CMA:

1. From the main CMA page, click **Report**. Alternatively, you can select the CMA that you want to e-mail from the list on the CMA Manager page and click **Report**. The CMA Report Preview page appears.

2. Click **E-mail**. The Send E-mail page appears.

3. The e-mail is automatically addressed to the client that the CMA presentation is linked to.

   NOTE! *Cc means "Carbon Copy" and Bcc means "Blind Carbon Copy." Bcc recipients are not visible to other message recipients.*

4. Click the link to the right of the address fields to select e-mail addresses from your personal MLXchange address book. (Alternatively, you can simply type e-mail addresses in the appropriate field, separated by semi-colons.) Your address book contains the e-mail addresses of any clients you have previously entered, plus email addresses for other members of your MLS. The Select Clients or Members window appears.

5. Choose the kind of e-mail address records you want to **Search for**: **Clients** or **Members**.

6. If you are looking for client addresses, you can quickly locate a client by typing their name in the field. If you are looking for MLS member addresses, you must enter a first name, last name, or office code and click **Find**.

7. Select the contacts in the list that you want to send the e-mail message to and click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field. You can select multiple contacts by holding down the CTRL or SHIFT key while you click.

8. Click **OK** to add the selected contacts to the list of e-mail recipients and return to the Send E-mail window.

9. Enter the **Subject** of the e-mail.

10. Make any changes to the **Message** that you want.

    NOTE! *Do not delete the line in the message box that begins with "http." It is the link to the CMA. You can move it, but do not delete it.*

11. Click **Send**. You are notified when the e-mail message has been successfully sent.

NOTE! *To view, forward, or delete messages that you have sent, open the Client Record and click E-mail History.*

Working with the CMA Manager

The CMA Manager page lets you perform a variety of common operations on your CMAs and presentations, including filtering, editing, copying, renaming, and deleting.

To filter the list of CMAs

1. To filter the list by selection, first select any number of CMAs from the list. Now select an option from the **Selection** list. If you choose **Show selected**, only the selected CMAs are displayed; if you choose **Show unselected**, only the CMAs that are not selected are displayed.

2. To only view CMAs and presentations associated with a specific client, select the client from the **Client** list.

To edit a CMA:

1. From the CMA Manager page, click the CMA you want to edit. The main CMA page appears.

To copy a CMA:

1. From the CMA Manager page, select the CMA you want to copy.
2. Click **Copy**. The Enter CMA Name window appears.
3. Enter a name for the copy of the CMA and click **OK**. The new CMA copy appears in the CMA Manager list.

To rename a CMA:

1. From the CMA Manager page, select the CMA you want to rename.
2. Click **Rename**. The Enter CMA Name window appears.
3. Enter a new name for the CMA and click **OK**. The renamed CMA appears in the CMA manager list.

To delete a CMA:

1. From the CMA Manager page, select the CMAs you want to delete.
2. Click **Delete**, then click **OK** to confirm the deletion. The deleted CMAs no longer appears in the CMA Manager list.

Making a New CMA Presentation Template

1. Place the mouse pointer over the CMA menu item near the top of the screen until the CMA menu appears. Click CMA Presentation Library. The CMA Presentation Library page appears.
2. The CMA Presentation Library shows a list of all the different presentations available for your use. Some presentations may have been created by your office administrators, while you may have created others yourself.
3. Click **New CMA Presentation**. The CMA Presentation dialog box appears.
4. Select the **Property Type** for the presentation. Depending on the property type you choose, different fields are available when adding and modifying presentation pages. The CMA Presentation Report Selection page appears.
5. Enter the **Name** and a **Description** of the new presentation.

6. Select the report(s) (i.e., pages) that you want to add to the CMA presentation from the **Available reports** list and move them to the **Selected reports** list by clicking the left arrow. To select more than one report at a time, hold down the CTRL or SHIFT key while clicking.

7. To remove a report, select the unwanted report from the **Selected reports** list and click the right arrow.

8. Change the position of the **Selected reports** by selecting each report individually and clicking the up/down arrows. The order of the **Selected reports** determines the order of the pages in the presentation.

9. To make a new report (i.e., page) from scratch, click **New Report**. (To create a new report from an existing report, select one of the **Available reports** from the list and click **Copy**.) The New Report dialog box appears.

10. Select from the list the **Type** of report you want to create and click **OK**. The Report Editor window appears. Refer to the Reports section for more information on using the Report Editor.

11. When you have finished creating the CMA presentation, click **Save** to return to the CMA Presentation Library.

Working with the CMA Presentation Library

The CMA Presentation Library lets you perform a variety of common operations on your CMA templates, including filtering, sorting, editing, copying, and deleting. The CMA Presentation Library also lets you choose the presentation templates that are used by default when creating new CMAs and buyer presentations.

NOTE! *You can only edit and delete presentations you created yourself.*

To filter and sort the list of presentation templates:

1. From the CMA Presentation Library page, select the **Property Type** of the presentations you want to view. Just the presentations designed for use with the selected property type are displayed. To view all presentations again, select **All** from the **Property Type** list.

2. Click the column header to sort the list of displayed presentations alphanumerically. Click the same column header again to reverse the sort order.

To edit a presentation template:

1. From the CMA Presentation Library page, click on the name of the presentation you want to edit. The CMA Presentation Report Selection window appears. Alternatively, you can select the presentation you want to edit and then click **Edit**.

2. **NOTE!** To modify a presentation template created by a system or office level administrator, you must make a copy of the presentation template first.

3. Make changes to the CMA presentation template as described in the “Making a New CMA Presentation” section.

4. When you have completed you modifications, click **Save**.

To copy a presentation template:

1. From the CMA Presentation Library page, select the presentation template that you want to copy.

2. Click **Copy**. A dialog box appears notifying you that the copied presentation template has been saved.

3. Click **OK** to close the dialog box. The new presentation template now appears in the list with the name “Copy of [the original presentation name]”.

To delete a presentation template:

1. From the CMA Presentation Library page, select the presentation templates that you want to delete.

2. Click **Delete**, then click **OK** to confirm the deletion. The deleted presentation templates no longer appears in the CMA Presentation Library list.

To set your default presentation templates:

1. From the CMA Presentation Library page, click **Set default CMA Presentations**. The CMA Presentation Default Settings window appears.

2. This window lets you choose two default presentation templates per property type: one for seller presentations and one for buyer presentations.

3. **Select a Search Type** from the list.

4. Select a **Default seller CMA presentation** from the list. The selected template will be used by default whenever you create a new create a new seller CMA for the selected property type.

5. Select a **Default buyer CMA presentation** from the list. The selected template will be used by default whenever you create a new create a new buyer presentation for the selected property type.

6. Click **Apply**.

7. Select a different **Search Type** from the list and repeat steps 4 through 6 above until you have specified default presentation templates for each search type.

8. Click **Close** when you are done to return to the CMA Presentation Library.

Using the Online Report Editor

The online report editor lets you customize CMA report pages and create new CMA report pages from scratch.

NOTE! Currently, the online report editor can only be used to make or modify simple, flyer-style pages. More complex pages that display tabular and/or calculated values can only be created or edited using the Designer Tool. Refer to the Tools section for more information on the Designer Tool.

1. Place the mouse pointer over the **CMA** menu item near the top of the screen until the CMA menu appears. Click **CMA Presentation Library**. The CMA Presentation Library page appears.

2. Make a new CMA presentation template or edit an existing template as described earlier in this chapter.

3. From the CMA Presentation Report Selection window, click **New Report** to create a new report page from scratch. (Alternatively you can use an existing report page as a template by making a copy of it first, selecting the copied report page from the **Available reports** list and clicking **Edit Report**.) Choose the report **Type** from the New Report dialog box and click **OK**. The online Report Editor appears.

Making a new report:

To make a new report:

1. Click the **Reports** menu near the top of the screen. The Reports page appears.

2. Click **Report Manager**. The Report Manager page appears. Alternatively, you can place the cursor over the **Reports** menu and click the **Report Manager** menu item to access this page directly. The Report Manager shows a list of all the system-level reports plus any personal reports you have created yourself.

3. Click **New** to create a new report page from scratch. Alternatively you can use an existing report as a template by making a copy of it. (Refer to the “Working with the Report Manger” section for more information on how to do this.) The New Report dialog box appears.

4. Select an available **Report** category and report **Type**, and then click **OK**. The online Report Editor appears.

5. Click the **Page Setup** icon. Using the Page Setup dialog box, select the appropriate **Page size**, **Orientation** and **Margins**, then click **OK**.

6. Add objects to the page and modify their appearance and properties as described in the following sections. **NOTE!** You can place the cursor over any icon to see a description of what it does.

7. Add additional pages to the report by clicking the **Add Page** icon. The new page is added at the end of the existing pages. To switch to a different page, select the page from the list. To delete the current page, click the **Delete Page** icon, then click **OK** to confirm the deletion.

8. When you are satisfied with the report, click the **Save** icon.

9. Enter the **Report Name** and the optional **Report Description**. If this page is just for use with CMAs, select **Make this report only available for CMAs**.

10. Click **OK** and then click **Close** to return to the Report Manager.

To add objects to a report:

1. Objects that can be placed on the page are categorized into three groups: **Data Fields**, **Images**, and **Miscellaneous**. Click the group in the lower left corner of the window that contains the type of object that you want to place on the page.

2. To create text on the page (for example, the page title), select the **Miscellaneous** group, and then click and drag the **Label Object** onto the page. To modify the text of a Label Object, click it to insert the cursor.

   NOTE! You can also use the Label Object to add graphical elements to the report. For example, you can create a label object, delete the text, give the text object a border, and the resize it to create a large rectangle. Other fields can then be placed inside the rectangle to group them visually.

3. To add a data field to the page, select the **Data Fields** group, and then select the type of field you want to add from the **Select category** list. Click a data field in the list and drag it onto the page to add it to the report.

NOTE! If you want the data field to have a label to the left of it (recommended), ensure that the **Include Label** option is selected before you drag the data field to the page.

4. To add an image to the page, select the **Images** group, and then select the image category (and **image slot number**, if required). Click an image merge code from the list and drag it onto the page to add it to the report. To add, edit or delete images from the database, click **Manage images**. The MLXchange image submitter window appears. Refer to the Tools chapter for more information on working with images.

5. You can also use the **Cut**, **Copy** and **Paste** icons to duplicate objects or move them between report pages.

To select an object on the page:

1. An object must be selected before you can delete it or modify its properties. To select an object on the page, click it once. The object is outlined to indicate that it is selected.

2. To select a group of objects, hold down the CTRL key while clicking additional objects.

3. Another way to select a group of objects is to click and drag on an empty area of the page to create a "selection rectangle." Extend the rectangle around the objects that you want to select. When you release the mouse button, the objects within the rectangle remain selected.

NOTE! Selecting a group of objects is very useful when you want to apply the same changes to multiple objects at the same time. For example, you can select a group of text objects and then use the Font and Font Size controls to change these properties simultaneously on all of the selected objects.

To delete an object:

1. Select the object you want to delete.

2. Click the **Delete** icon or press the DELETE key on your keyboard.

3. Click **OK** to confirm the deletion.

To change the size of an object:

1. Select the object you want to modify. The edge of the object displays small white squares-one in each corner and one at the center of each side. These small white squares are handles that let you resize the object.

2. Click a handle and drag it in any direction to resize the object.

   NOTE! Any portion of an image or text that extends beyond the object's borders will be cut off when displayed or printed. Ensure that the object is large enough to accommodate its contents.

To change the position of an object:

1. Place the cursor over an object until the mouse pointer becomes a four-way arrow. For a Label Object, place the cursor over the edge of the object (but NOT over a handle) to make the mouse pointer become a four-way arrow.

2. Click and drag the object in any direction to reposition the entire object.

3. If two or more objects overlap each other, you can specify which object is on top and which is on the bottom using the **Bring to Front** and **Send to Back** icons. Select the object you want to bring forward or send back and click the appropriate icon. This feature can be especially useful when overlapping images to create an artistic effect.

To align a group of objects:

1. Select the group of objects that you want to align as described above.

2. Click one of the Align icons. The selected objects are aligned according to the selected aspect. For example, if you click the **Align Lefts** icon, all of the selected objects will be moved to the left so that their left edges line up with the edge of the left-most object.

To change an object's text formatting:

1. Select the text object(s) that you want to modify. If you are working with a single Label Object, you can use the cursor to highlight and format just a portion of the label's text.

2. Select a font and point size for the text from the lists.

3. Click the **Outside Border** icon to create a black border around the text. Resize the text object as described above to change the dimensions of the border. Click the icon again to remove the border.

4. Click the **Font Color** icon to change the text to the currently selected color. To change the selected color, click the small down arrow to the right of the icon, select a new color from the Color window, and then click **OK**.

5. Click the **Bold**, **Italic** and **Underline** icons to apply these effects to the text. Click the icons again to remove the effect.

6. Click the **Align Left**, **Center** and **Align Right** icons to change the justification of the text within the boundaries of the text object.

To print the report:

1. If you want to get a sense of how the report will look printed, click the Print icon. A standard Windows Print dialog box appears.

2. Choose any additional report options (e.g., number of copies, destination printer, etc.) and click OK to print the report.

   NOTE! Report printed directly from the Report Editor will not show any property information, images, or other data. Merge codes and image placeholders will print exactly as shown on screen.

To adjust the workspace settings:

1. Change the zoom level by selecting a percentage from the **Zoom** list.

2. Show grid lines on the page by clicking the **Grid** icon. Click the icon again to hide the grid lines. The grid lines are only a design aid; they are not part of the report and will not be displayed when viewing or printing the report later. The grid lines also indicate the usable page

area as determined by the Margins setting under Page Setup. Objects cannot be placed or moved outside the grid area.

3. Select **Snap to Grid** to make objects automatically line up with the grid lines when they are moved or resized. This option is very useful for ensuring that a group of objects (e.g., labels and data fields) are properly spaced and aligned.

4. Show rulers at the top and to the left of the page by clicking the **Rulers** icon. Click the icon again to hide the rulers.

Working with the Report Manager

The Report Manager lets you perform a variety of common operations on your reports, including filtering, sorting, editing, copying, renaming, and deleting.

NOTE! You can only edit, rename or delete "Personal" reports, i.e., reports you created yourself.

To filter and sort the list of reports:

1. From the Report Manager Page, select the **Report** category, report **Type**, and the **Owner** of the reports that you want to view. Just the reports matching your selections are displayed. To view all reports again, select **All** from the **Report and Type** lists.

2. Click the column header to sort the list of displayed reports alphanumerically. Click the same column header again to reverse the sort order.

To edit a report:

1. From the Report Manager page, click on the name of the report you want to edit. The Report Editor appears. Alternatively, you can select the report you want to modify from the list and click **Edit**.

   NOTE! To modify a system or office level report, you must make a copy of the report first.

2. Make changes to the report as described in the "Making a New Report" section.

3. When you have completed you modifications, click the **Save** icon and then **Close**.

To copy a report:

1. From the Report Manager page, select the report that you want to copy.
2. Click **Copy**. The Report Editor appears.
3. Click the **Save As** icon, enter a new **Report Name**, and then click **OK**.
4. Click **Close** to return to the Report Manager where the copied report will now appear in the list.

To delete a report:

1. From the Report Manager page, select the reports that you want to delete.
2. Click **Delete**, then click **OK** to confirm the deletion. The deleted reports no longer appears in the CMA Presentation Library list.

Quick Reference Sheets

CMA Tips & Tricks

Tip 1

Create a search template just for CMA searches. Having your own custom CMA search template that contains only the fields you use when searching for comparables will save you lots of time!

Here's how!
From the Search Criteria screen action menu (lower left corner).
Step 1 Select **Template Manager** option in the action menu and click the green go button.
Step 2 Highlight the template you wish to modify.
Step 3 If it is a system template (one of the standard templates that came with MLX) click **Copy**, if the template you wish to modify is one you created click **Modify**.
Step 4 Select items from the **Available Search Fields** box on the left that will be displayed as available search criteria, click the ▶ arrow to bring them over to the **Selected Search Fields** box. If there are fields in the **Selected Search Fields** box that you don't want, simply select those fields and click the ◀ arrow. (Note: You can prioritize the order of criteria by its importance using the ▲▼ at the bottom of the **Selected Search Fields** box).
Step 5 Click **Finish** at the bottom right corner.
Step 6 Highlight the template you created and click **Done.**
Note: At this point you can enter and save criteria to be used as default info for the CMA template - i.e. if you always use the same status(s) for your CMAs, pre-select the criteria for status. While your template is being displayed, go to the status field and select the status(s) to be saved (i.e. Active, Pending, Sold). Select **Save Template** from the bottom left action menu then click on the green go button.

Tip 2

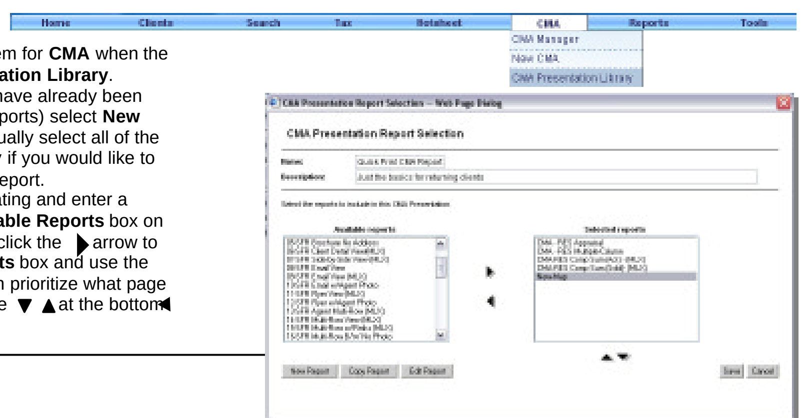
Create a custom results screen grid just for CMA. This will allow you to specify (ahead of time) those key items you need to see when selecting comparables without having to view detail listing data for every perspective comp.

Here's how!
Enter criteria for a search (any criteria to get to results) click Results
Step 1 Select **Column Manager** from the action menu and click the green go button or click on the icon located at the top left of the result screen, next to the pull down list of available grids.
Step 2 Highlight the grid you wish to modify.
Step 3 If it is a system grid (one of the standard grids that came with MLX) click **Copy** selected column report , if the grid you wish to modify is one you created click **Modify.**
Step 4 **Name** the grid (top left corner). Select the items from the **Available Grid Fields** box on the left that will be displayed as listing data on the result screen, click the ▶ arrow to bring them over to the **Selected Grid Fields** box. If there are fields in the **Selected Search Fields** box that you don't want, simply select those fields and click the ◀ arrow. (Note: You can prioritize what listing data appears first, second, etc. by using the ▲▼ at the bottom of the **Selected grid fields** box).
Step 5 Click **Finish** at the bottom right corner.
Step 6 Highlight the grid you created and click **Done**.

Tip 3

Create several custom CMA Binders/Presentations (Note: A binder is a compilation of various report pages bound together to create a single, multi-page presentation).

Here's how!
Step 1 Hover your curser over the menu Item for **CMA** when the rollover menu appears select **CMA Presentation Library**.
Step 2 When the list of Presentations that have already been created appears (either by you or system reports) select **New CMA Presentation** if you would like to manually select all of the pages to be used in your CMA. Select **Copy** if you would like to add and/or remove pages from an existing report.
Step 3 **Name** the presentation you are creating and enter a description. Select the items from the **Available Reports** box on the left that will be used in this CMA report, click the ▶ arrow to bring the report over to the **Selected Reports** box and use the ◀ arrow to remove any reports. (Note: You can prioritize what page appears/prints first, second, etc. by using the ▼ ▲ at the bottom of the **Selected Reports** box).



Step 4 Click **Save**.

Tip 4

Customize your CMA pages/reports. Any listing, client, agent/office report template can be modified to display just the images, text and listing data you specify. Note: The listing report templates you create will also be available for printing in listing search as well as CMA.

Here's how!

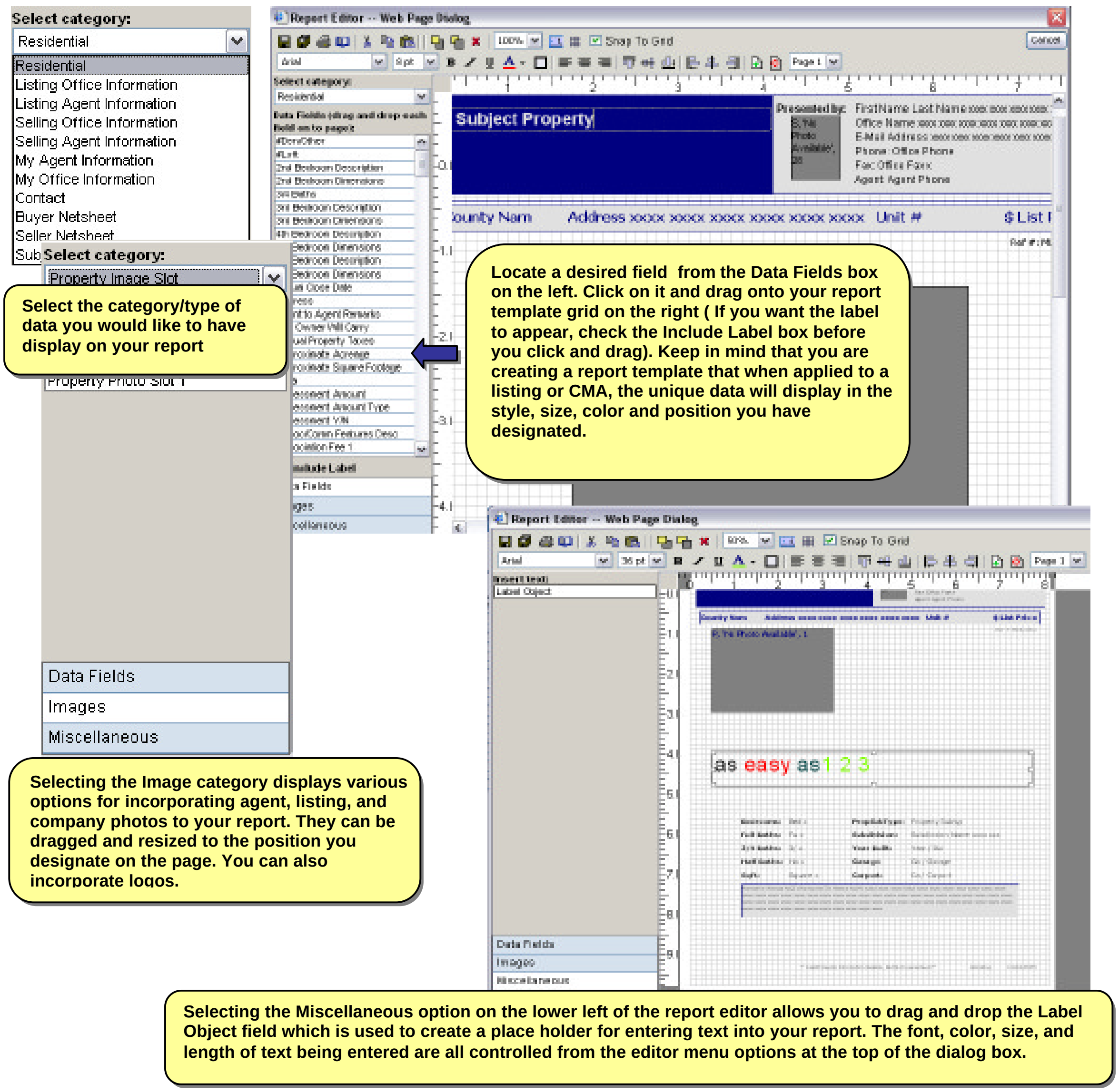
Step 1 Follow Step1 and Step2 in Tip3.

Step 2 To create a new report click the button labeled **New Report**. To edit an existing system report you must click the **Copy Report** button. Note: Only reports that display a single listing's data can be copied or created as a new report.

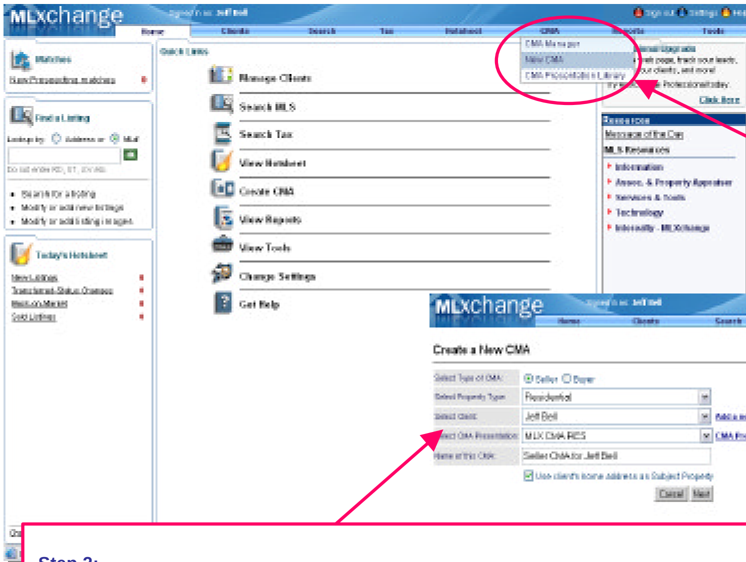
Step 3 Use your creativity but be sure to utilize the word processing/desk top publishing options provided to create a unique presentation.

Step 4 Select the option located at the top left, **Name** your report template and click **OK**.

Note: The template you have created CANNOT be saved to your desktop or transferred to another MLX user.



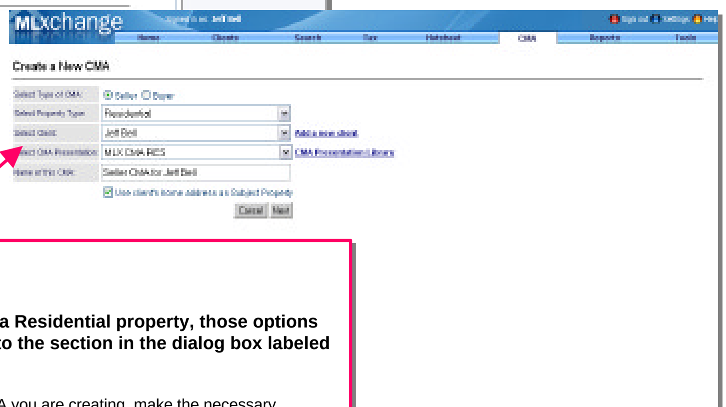
CMA 1-2-3 Quick Reference Sheet



Step 1:

From the home page roll your mouse curser over the main menu option labeled CMA.

Select the option labeled **New CMA**.



Step 2:

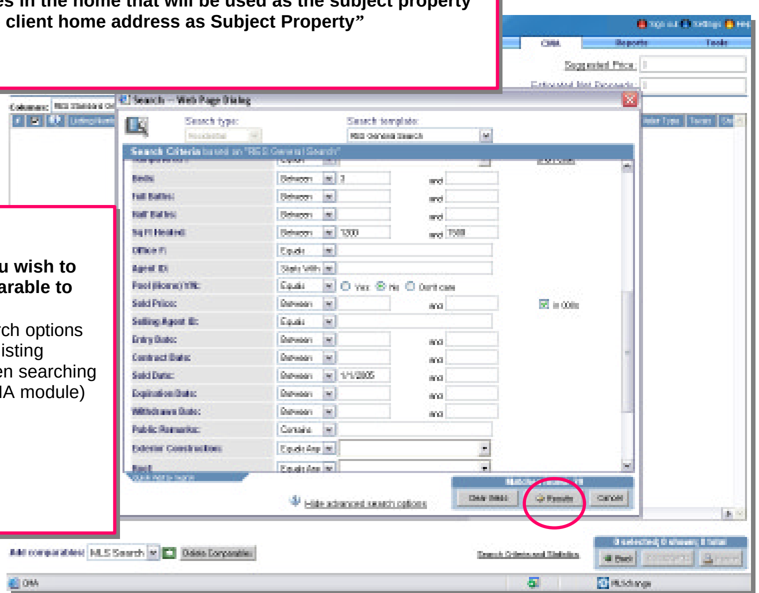
Since most CMA's are created for Sellers of a Residential property, those options have been pre-selected as defaults so skip to the section in the dialog box labeled "Select Client".

(Note: If the default settings are not correct for the CMA you are creating, make the necessary changes using the pull down menus and radial buttons)

Select the Client record to be used for this CMA
(Note: If you have not entered the client information into MLX prior to this step use the Add a new client link)

If the Client currently resides in the home that will be used as the subject property check the box labeled "Use client home address as Subject Property"

Click Next.



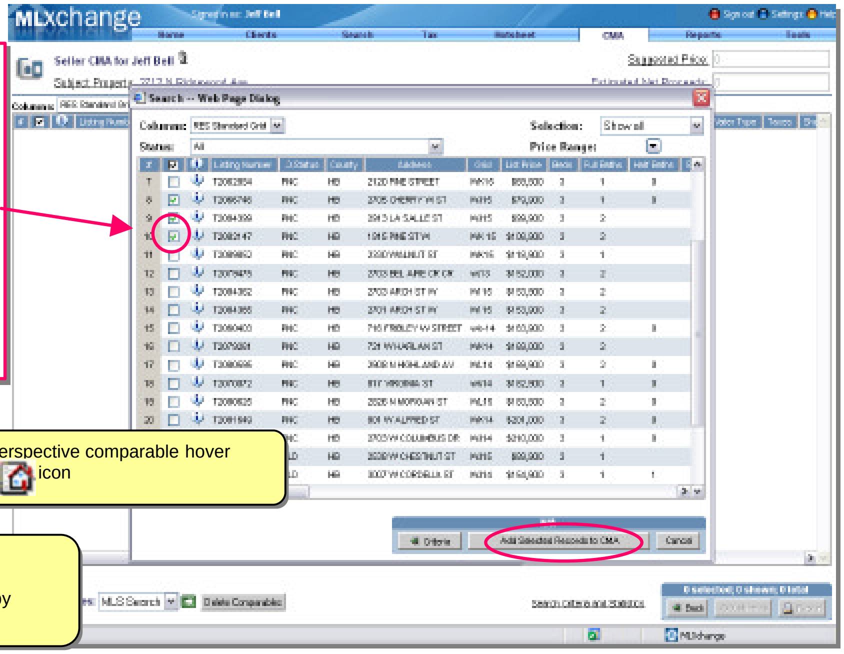
Step 3:

Enter the search criteria you wish to use to locate listings comparable to the subject property
(Note: all of the advance search options available when conducting a listing search are also available when searching for listings from within the CMA module)

Click Results

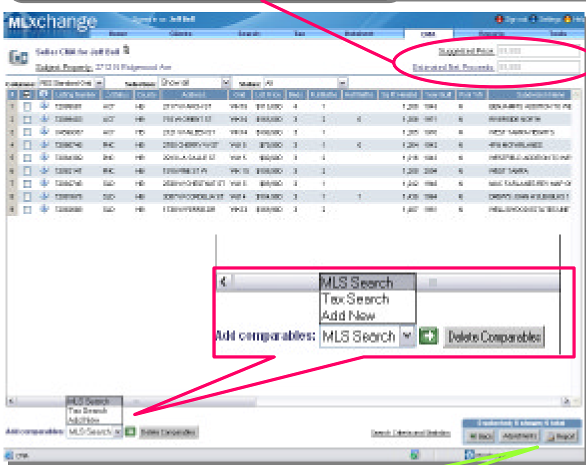
Step 5:
Select the listings you will use as comparables by clicking inside the empty check box to the left of the corresponding listing
(Note: All of the advance listing views available when viewing results from listing search are also available from the result screen within the CMA module)

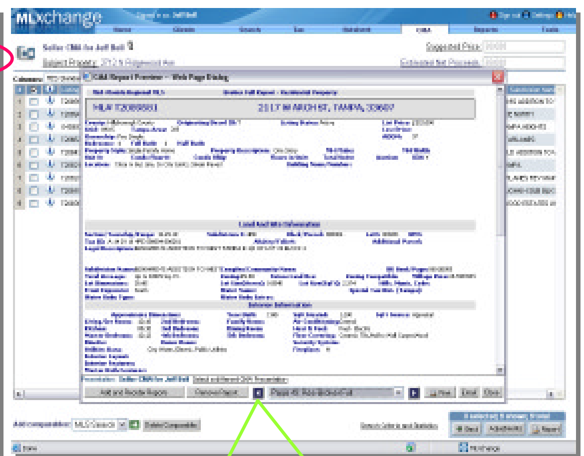
Click Add Selected Records to CMA



Note: To view detail listing data of a perspective comparable hover over the button and select the icon

The parameters used to calculate **Suggested Price** and **Estimated Net Proceeds** can be manually adjusted by clicking the corresponding link





Step 6:
Include additional comparables from the MLS and Tax Records (where Integrated Tax is available) or manually enter the property data to be used as a comparable, using the **Add Comparables** menu (bottom left of the CMA screen).

Make adjustments to any of the comparables in your list using the **Adjustment** button located at the bottom right of the CMA screen.

Click the **Report** button to generate your CMA presentation.

Step 7:
Once your CMA presentation has been created you can change the order of the pages in the report or change which pages are to be included by using the **Add and Reorder Reports** (Note: This change must be made prior to selecting print or e-mail) the report before selecting the **Prin**t or **E-mai**l option.