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A CMA (Comparative Market Analysis) report is a compilation of current and historical property pricing history information used to establish pricing recommendations for a subject property. Follow the steps in these sections to create a Quick or Presentation CMA report:

- “Searching for Comparable Properties” below
- “Mapping Comparable Properties” on page 7
- “Generating a Presentation CMA” on page 9

### Searching for Comparable Properties

When searching for comparables, you should keep your search criteria and location criteria as close to your subject property as possible. Follow the steps below to search for comparables:

1. Click the **Search** tab.
2. Click a search link for the type of property you’re analyzing. In this example, we will be using a **Detail** search to find comparable residential properties.

   ![CMA Matrix Search](image)

**Note:**
To search for comparables using the most common CMA related search fields, use the dedicated CMA search.
3. Click **Map Search**.

4. Enter the subject property’s address in the available fields, then click **Locate**.
5. Use the draw tools to limit your search area to a specific distance. In this example, we will be using the **Draw Radius** tool.

![Map Search Region](image)

6. Click **OK** to save your Map Area and return to the Detail search screen.

7. Select the listing Status for your comparables in the **Status** field.

8. Enter the number of days back to search in the **CMA Status Date** field.

**Note:**

*The CMA Status Date is used in conjunction with the status of Active, Pending, Sold, Canceled and Expired. You will receive all Active and Pending listings, regardless of the CMA status date used. The CMA status date applies only to Sold, Canceled, and Expired listings.*
9. Select additional search criteria as necessary. Do not select an Area or City, the Map Search will automatically limit the search area based on the area you specified in the Map Search.

**Note:**
If you do not want to include Auto Sold listings in your CMA search results, add the **Auto Sold? Y/N** field to your search and select **No**.

For a list of special characters allowed for search fields, See “Additional Search Options” on page 6.
If you need help entering search criteria, click the ? icon next to the field you need help with.

10. Click the **Search** button.

Refer to these sections to map the comparables and generate the CMA report:
- “Mapping Comparable Properties” on page 7
- “Generating a Presentation CMA” on page 9
### Additional Search Options

Refer to the table below for a list of special characters allowed for search fields.

<table>
<thead>
<tr>
<th>Special Character</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Greater than or equal to: Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.</td>
<td>Bathrooms: 3+ Finds all listings that have 3 or more bathrooms.</td>
</tr>
<tr>
<td>–</td>
<td>Less than or equal to: Allows you to search for values that are less than or equal to the value you entered. When using the – character, it must follow the value you enter.</td>
<td>Bathrooms: 4- Finds all listings that have 4 bathrooms or less.</td>
</tr>
<tr>
<td></td>
<td><strong>Range:</strong> Allows you specify a numeric range.</td>
<td>List Price: 150000-200000 Finds all listings with a list price ranging from $150,000 to $200,000.</td>
</tr>
<tr>
<td>,</td>
<td><strong>Either/Or:</strong> Allows you to enter multiple values in a single field.</td>
<td>Type: SFR, CONDO Finds all listings that are condominiums or single-family residences.</td>
</tr>
<tr>
<td>*</td>
<td><strong>Wildcard:</strong> Searches for unknown letters and/or numbers.</td>
<td>Street Name: <em>Park Finds all listings that are located on a street that ends with the word Park. Street name Park</em> Finds all listings that are located on a street that begins with the word Park. Property Description/Office Comments: <em>key word</em> Finds all listings with the “key word” in the property description or office comments. Use commas to separate multiple key words.</td>
</tr>
<tr>
<td>!</td>
<td><strong>Exclude Selections:</strong> Will exclude listings that contain the excluded search criteria. When using the ! character, it must precede the value you enter.</td>
<td>Year Built: !1960 Excludes all listings that contain properties that were built in 1960.</td>
</tr>
</tbody>
</table>
Mapping Comparable Properties

Follow the steps below to display comparable properties on a map. You can also print or save the mapped properties as a PDF for your client.

1. Click the checkbox next to the comparables you want to map.
2. Click the Map button.
3. Click the **Print** button and follow the prompts on the screen to print a copy of the map.

   **Note:**
   To get driving directions to each of the comparable properties, click **Get Directions**.

4. When you're done mapping comparable properties, click **Back to Results**, then see “Generating a Presentation CMA” on page 9 to generate the CMA report.
Generating a Presentation CMA

Follow the steps below to create a presentation CMA for your client.

1. From the Search Results page, select the comparable properties you want to include in the presentation CMA report.

   **Note:**
   You can select up to 50 listings for your CMA report.

   Listings with an asterisk (*) next to a status of Pending (P) or Closed (S) have been Auto Sold by the CRMLS Matrix Platform and may contain inaccurate information. Auto Sell is a Status Violation and takes effect 5 days after the Estimated COE Date on a listing that is in Pending or Backup Status. When a listing Status is not changed or updated prior to the Estimated COE Date it goes to Auto-sell with a status of P*. If the listing is not updated after 5 days of the Estimated COE Date it goes to a status of S*. Prior to each time frame CRMLS will email all responsible parties (Agent, Broker, and Association/Board) of the inaccurate information and the member may be subject to a fine.

2. Click the CMA button.

3. You see the CMA wizard. Select a contact in the Select Contact Name drop-down list.
Note:
If you’re creating a CMA for a client that’s not in your contact list, click **Create a New Contact** to add a new contact.

If you need to save your CMA and finish it at a later date, click the **save** icon. To continue creating a partially saved CMA, click the CMA link on the My Matrix tab to view all of your Saved CMAs. Click the arrow next to the CMA to expand it and click the **Edit CMA** button.

4. You can optionally enter a **Description** to help you identify the CMA.

5. Click the **Pages** button to move to the next section of the CMA Wizard.

6. Click the plus button next to the Available Page types to expand them, then select a page to add it to your CMA. The page will appear in the Selected Pages box to the right.

**Note:**
To change the order of a page in the Selected Pages Box, click a page, then click the blue up or down arrows on the right to move the selected page.

To delete a page from Selected Pages box, click the page you want to remove and click the red X.

To remove all pages, click the Clear link at the bottom right corner.
Refer to the table below for a brief description of the available pages for presentation CMAs.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover sheet</td>
<td>A cover page that contains your name, office, office phone number and e-mail address. You can also add a photo and description by clicking the <em>Edit Subject</em> button.</td>
</tr>
<tr>
<td>Market Analysis Explanation</td>
<td>An explanation and overview of a CMA.</td>
</tr>
<tr>
<td>Minimums and Maximums</td>
<td>Summarizes key fields of the listings in the analysis such as price, bedrooms, bathrooms, square feet, price per square foot, and year built.</td>
</tr>
<tr>
<td>Summary of Comparable Listings</td>
<td>Summarizes the comparable listings contained in the market analysis.</td>
</tr>
<tr>
<td>Number of Days on Market</td>
<td>A graph that illustrates the number of days on market for the listings in this analysis.</td>
</tr>
<tr>
<td>List and Sale Price</td>
<td>A graph that illustrates the list price, along with the sale price in Sold listings.</td>
</tr>
<tr>
<td>The Importance of Pricing</td>
<td>A chart that highlights the importance of pricing correctly at market value.</td>
</tr>
<tr>
<td>Activity vs. Timing</td>
<td>A chart that highlights the importance of pricing correctly at market value.</td>
</tr>
<tr>
<td>The Effect of Over Pricing</td>
<td>A chart that highlights the importance of pricing correctly at market value.</td>
</tr>
<tr>
<td>The Pitfalls of Overpricing</td>
<td>A chart that highlights the importance of pricing correctly at market value.</td>
</tr>
<tr>
<td>Setting the Price</td>
<td>A chart that highlights the importance of pricing correctly at market value.</td>
</tr>
<tr>
<td>Sources of Buyers</td>
<td>Illustrates the primary sources of buyers for your property.</td>
</tr>
<tr>
<td>Where a Commission Goes</td>
<td>Describes how commission is divided amongst all the parties involved.</td>
</tr>
<tr>
<td>The Benefit of Using a Professional Realtor</td>
<td>Outlines the benefits of using a professional REALTOR® to sell your property.</td>
</tr>
<tr>
<td>My Guarantee to You</td>
<td>Your personal guarantee to your client.</td>
</tr>
<tr>
<td>Steps to a Positive Showing</td>
<td>Describes the steps for making a positive showing of your property.</td>
</tr>
<tr>
<td>What it Takes to Show</td>
<td>Describes what it takes to show your property.</td>
</tr>
<tr>
<td>CMA Pro Report</td>
<td>Shows three properties per page with a photo and important property details. It includes the average prices, summary graph/analysis, cumulative analysis, and sold property analysis.</td>
</tr>
<tr>
<td>Report (Continued)</td>
<td>Description (Continued)</td>
</tr>
<tr>
<td>------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CMA Full Report</td>
<td>Summarizes the comparable listings contained in the market analysis. It contains three properties per page with important property details and a photo.</td>
</tr>
<tr>
<td>CMA Brief Report</td>
<td>Summarizes the comparable listings contained in the market analysis.</td>
</tr>
<tr>
<td>Listing Details 3 Up</td>
<td>Details the comparable listings contained in the market analysis, 3 properties per page with a photo.</td>
</tr>
<tr>
<td>CMA Price Adjustments</td>
<td>Outlines the subject property versus the comparable properties.</td>
</tr>
</tbody>
</table>

7. Click the **Subject** button to move to the next section of the CMA Wizard.

8. Use one of the following methods to enter information for your subject property:
   - Click **Type in the subject property fields manually** and enter the information manually.
   - Enter a Residential Multiple Listing Number in the available field and click the **Fill** button to auto-fill information for your subject property.
   - Click **Search for a Residential listing to auto-fill from** to search the MLS for your subject property and auto-fill the information.
9. Click the **Cover** button on the CMA Navigation bar.

10. Enter the following information in the available fields:
   - Enter your client’s contact information under Subject Property Information.
   - **Click Browse** under Subject Cover Photo to upload a subject property photo that you have saved on your computer. If you auto-populated your Subject property from the MLS, a subject photo will automatically be selected. To change the auto-populated photo, click **Browse** to upload a photo that you have saved on your computer.

   **Note:**
   If you auto-filled your subject property from an existing listing, the Subject Cover Photo will automatically be selected. If the Cover button is grayed out, one of the Cover pages was not added to your CMA report. Click the Pages button on the navigation bar to go back and add a Cover page.

   - Enter your contact information under Agent Information. To save your contact information for future CMAs, click **Set as Defaults**.
   - **Click Browse** under Agent Photo or Broker Logo to upload a photo of yourself or a broker’s logo that you have saved on your computer.
11. Click the **Comparables** button to move to the next section of the CMA Wizard.

12. Do one of the following:
   - To add additional comparables, click the **Search for Additional Comparables** or **Add Comparables from Cart** button.
   - To remove comparables, click the checkbox next to each comparable you want to remove, then click the **Remove Selected** button.

13. Click the **Adjustments** button to move to the next section of the CMA Wizard.
14. Set values for property features to automatically adjust all of the comparables according to the amounts you specified.

![Adjustment Details Table]

**Note:**
If the Adjustments button is grayed out, the Price Adjustments page was not added to your CMA report. Click the Pages button on the navigation bar to go back and add the Price Adjustments page.

15. Click the **Pricing** button to move to the next section of the CMA Wizard.

The Summary table summarizes the price calculated from the adjusted comparables and provides you with an estimate of what the property is worth.
16. Enter information in the Suggested List Price field, if necessary.

<table>
<thead>
<tr>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following table summarizes the prices calculated from the adjusted comparables:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Comparable Price</td>
</tr>
<tr>
<td>Adjusted Comparable Price</td>
</tr>
</tbody>
</table>

**Note:**
If the Pricing button is grayed out, the Pricing Recommendation page was not added to your CMA report. Click the Pages button on the navigation bar to go back and add the Pricing Recommendations page.

17. Click the Finish button to move to the last section of the CMA Wizard.
18. Do one of the following:

- Click **View CMA** to view and print the CMA report.
- Click **Email CMA** to email the CMA Report to your client.

**Note:**

To view a saved CMA, click the CMA link on the My Matrix tab to view all of your Saved CMAs. You can also click the Contacts link on the My Matrix tab to open a CMA Report for a particular client.
Managing Presentation CMAs

To manage your CMAs, click the CMAs link on the My Matrix tab.

You can also click the Contacts link on the My Matrix tab and open the CMA for a particular client.

Click the arrow next to expand the CMA to do the following:

- Click Edit CMA button to make changes to an existing CMA report.
- Click View CMA button to view a previously generated CMA report.
- Click Email CMA button to email the selected CMA report to a client.
- Click Delete CMA button to delete the CMA report.

You can also use the buttons at the bottom of the screen to start a new CMA, copy the selected CMA, and delete selected CMAs.

Note:
The CRMLS Matrix Platform automatically deletes unmodified CMAs that are 90 day old.
Follow the steps below to generate a Quick CMA or Statistical CMA for any property type. Before you begin, search for comparable properties as described in “Searching for Comparable Properties” on page 2.

1. Click the Report button at the bottom of the Search Results page.

2. Select Quick CMA or Statistical CMA, then click Email or Print/View.

Note:
You can select up to 100 listings for Quick CMA and Statistical CMA.
Follow the steps below to export listing data from the CRMLS Matrix Platform for other CMA programs.

1. Click the checkbox next to each listing you want to export on the comparable Search Results page.

2. Click Export.

3. Choose from any of the Available Exports and click Export.

4. Follow the prompts on the screen to save the exported listings to your computer.

Note:
You can select up to 500 listings at a time to Export.
Custom Exports

Follow the steps below to create specialized exports for third-party software or to help you analyze listing data.

1. Click the Settings link on the My Matrix tab.

2. Click Custom Exports.
3. Select a property type in the Table drop-down list and click the **Add** button.

![Image of Manage Custom Exports dialog box]

**Note:**
Use the **Edit**, **Copy**, and **Delete** buttons to manage existing custom exports. You can also change the sort order of the custom exports by selecting an export and clicking the **Move Up** or **Move Down** buttons.

3. Enter a name for the custom export.

![Image of Set Export Definition dialog box]

4. Select a field in the **Available Fields** list, then click the **Add** button to add them to the **Export Fields** list.

If you need to remove a fields from the **Export Fields** list, select the field and click the **Remove** button.

**Note:**
To re-order the fields, select a field and use the **Up** and **Down** buttons.
5. Select an option for Include Column Names to include or exclude the column Label or Name in your export.

6. Select the type of Separator you would like to use for your export.

7. Type a description for your export to help you easily identify it.

8. Click **Save** to save your custom export or click **Cancel** to go back to the previous screen without saving.

To generate your custom export, perform a listing search and select the listings you want to export. Then click the Export button.

**Note:**
You can select up to 500 listings to export at a time.

Select your Custom Export from the drop-down list, then click the **Export** button.

To edit or update your export, click the **Edit Custom Export** button.

To return to the Search Results page, click the **Return to Search** button.
CRMLS takes pride in providing expert customer support to all of our members. Our technical support staff is prepared to assist you with any CRMLS Matrix Platform questions you may have, technical issues, or trouble shooting assistance.

To contact our technical support department, visit our website at http://www.crmls.org and click the SUPPORT button. Then click the Submit Support Request or Suggestions link to submit a support request or a suggestion (we value your suggestions).

If you need immediate assistance, our customer support technicians are available to answer your questions Monday through Friday from 8:30 AM to 9:00 PM and on Saturday and Sunday from 10:00 AM to 3:00 PM.

Toll Free Number:  (800) 925-1525
On the web: http://www.crmls.org/support