Welcome To The Paragon™ 3.4 CMA Guide

The following tutorial will assist you in performing the steps necessary in creating a CMA Packet in Paragon. For Additional information, login to Paragon and choose Help from the blue navigation bar. Type in CMA under keyword and examine the results...
CMA Presentations

About CMA Presentations

A comparative market analysis, or CMA, is a real estate agent's evaluation, based on local listing and sales data, to determine the probable sale price of a property in the current market. Sellers can use a CMA to help determine a list price. Buyers can use a CMA to help them decide what to offer on a listing they want to buy.

The CMA module in Paragon 3 contains a CMA presentation builder that allows you to easily create multiple CMA presentations. These presentations can be printed or emailed to any potential client. A CMA presentation includes many different items such as subject properties, cover letters, listing photos, etc. Multiple CMA presentations can be created and saved to be used when needed.

The CMA Presentation builder in Paragon 3 has been laid out in logical fashion so an agent can click through the tabs left to right in the presentation window to complete the process. This includes the following seven steps to build the presentation:

1. Create or Select Subject Property
2. Create or Select Client
3. Add Listings to Comparables
4. Insert Adjustments
5. Select Theme and Header/Footer in Page Setup
6. Set Up Reports
7. Generate Presentation and Email

To begin the process in Paragon, click CMA > Create New CMA Presentation.
Step 1: Create or Select a Subject Property

To begin the process in Paragon, click CMA > Create New CMA Presentation. The page will default to the Subj/Client tab.

To create a new subject property
1. Click the Create New link on the Subj/Client page.
2. Select the Class for the search and click the Apply button
   Note: From this page, you can click on the Copy Listing link from the menu options at the top to copy a current listing to use as the subject property. For more info, see "Copying a Subject Property" in the help section of Paragon.
3. Enter all of the criteria for the Subject Property and click Save – this will return users back to the Subject Property page displaying the new listing information and photo and the ability for photo maintenance by clicking on the Add/Modify Photo link. The listing is also added to the list of available subject properties for future use.

To select a current or previous subject property
1. Click on the Select From List link in the top right corner. A CMA Temp/Subject Property Listings window will launch.
2. Scroll to the listing that you wish to add
3. Click the round radio button next to the listing
4. Click the Select link and the listing info will be added to the Subj/Client page.
Step 2: Create or Select a Client

Create or Select Client

To create a new client
1. Click the **Create New** link next to the Client icon. A new Contact Manager will open.
2. Complete the information for the new client and click **Save This Contact** (this adds the client permanently to the agent's contacts).
3. Click on the X in the top right corner to close the Contact Manager window and return to the CMA Setup.

![Contact Manager](image)

To select current client from contact list
1. Click the **Select From List** link – a new Contact Manager will launch with a list of current contacts.
2. Search for contact on list and click the button next to the contact
3. Click OK and the client will be added to the CMA
Step 3: Add Listings to Comparables

**Add Listings to Comparables**

1. Click on the Comparables tab

2. Click **Add Listings** (from the above window)— a new window will launch with CMA Listing Options

3. Select the listing source option (from the following window)
   - Note: If a search option is selected, individual listings can be added to the Comparables by highlighting the listings to include and clicking the Add To CMA link

4. Once the listings have been added, they can be re-ordered by clicking the **Move Up** | **Move Down** links (in the following window).
5. More listings can be added by clicking on the Add Listings link.

- Listings can be deleted from the list by selecting the listings to be deleted and clicking on the Remove Listings link.

- The data in the list can be customized and sorted by clicking on the Customize / Sort link. A new Web Page Dialog window will launch.

- Features can be added by selecting Features (or Feature Categories) from the Group dropdown menu in the top left corner.

- Then users just need to highlight the features they want to add and click the Add > button to include them in the comparable.

- **Note:** From this page, the listings can also be printed or emailed by clicking on the Print/Email link at the top of the page.
Step 4: Insert Adjustments

1. After the Comparables have been added to the CMA, click on the Adjustments tab.
2. Enter the amount for the adjustment in the blank field at the end of each row.
3. The comparables can be customized by clicking on the Customize link in the top right corner of the window. In Paragon, Features and Feature Categories can be added to the comparable.
4. Manual and saved adjustments can be added at the bottom of the adjustments page.

**Note:** The adjustments will need to be entered for each listing (if necessary).
Step 5: Select Theme and Header/Footer

From this page, agents can determine which theme, header/footer and disclaimer to use in their presentation.

1. Select Presentation Theme

   ![Theme Options]

2. If including a header or footer, select whether it will be a header or footer under Page Location

3. If including text, enter the text and select the text alignment

4. If only one photo is being used, select the alignment under Single Image Alignment

5. Even though the field is called "Include Logo" any image can be uploaded to this holder (as well as the "Include Image" holder).

6. Depending upon MLS preferences, the Disclaimer will either be static (as shown) or there will be options for the agent to select the Long, Short or No Disclaimer.
Step 6: Set Up Reports

After Themes and Header/Footers have been set up, the next step is to set up the reports to be included into the CMA.

The 14 following reports can be added to the CMA. The following graphics will show some examples of how each one is used, turned on, etc.

For detailed examples of all these reports, click [here](#)

- Cover Page
- Cover Letter
- Agent Resume
- Company Info
- Subject Property Detail
- Summary of Adjustments
- Comparable Report (Horizontal)
- Comparable Report (Vertical)
- CMA Summary
- Comparable Property Statistics
- Comparable Price Analysis
- Map
- Final Comments
- Seller’s Net Sheet

For all reports under the Report Setup tab, click the box in the Include column to add the report to the CMA. In addition, the reports can be re-ordered in the CMA by highlighting the report (so it has the black arrow to the left of the report name) and clicking the [Move Up | Move Down](#) link.
Cover Page

If including the Cover Page, complete the form on the right frame of the page.
Paragon now allows users to modify the stored cover letter from the Cover Letter Report Setup page. Select the cover letter to include in the CMA and click the **Modify Default** link. The rich text editor will launch with and the agent can make necessary changes. Note: the text editor now includes spell check!
Agent Resume

Like the Cover Letter, the Agent Resume can be modified in the Reports Setup page.

Click here to select and modify the resume to be included in the CMA.
Company Info

Like the previous two reports, the Company Info letter can also be edited from the Report Setup page.
Subject Property Detail

There are two views available for the Subject Property. These views can be customized under Preferences > Views Reports > CMA > Subject Property 1 & 2.

Select which Subject Property View to use in the presentation. This view is customizable from Preferences > Views/Reports > CMA > Subject Property 1 & 2.
Summary of Adjustments

The Summary of Adjustments report will only appear if adjustments have been added to the comparables. This report cannot be modified.
Comparable Report (Horizontal)

The Comparable Report is now customizable.

- Due to size constraints, only 12 fields can be added. In addition, agents have the ability to add the Subject Property on each page, at the top of the report, or not at all.

- Available remarks fields can be added to each property.

- Finally, a Class Summary Statistic report, which includes the High, Low, Average and Median price points, can be added to the bottom of the Comparable Report.
Comparable Report (Vertical)

Like the Horizontal Report, the Vertical Report is customizable. The Subject Property can be added to each page, and the Class Summary Statistics can be displayed at the end of the report. Unlike the Horizontal report, Remarks cannot be added due to limitations in the field sizes of the orientation.

Agents now have the option where to include the Subject Property.

The Class Summary Statistics is a report that appears at the bottom of the Comparable Report and includes the High, Low, Average and Median price points.
CMA Summary

The CMA Summary gives a one page summary of all of the comparables in the CMA. The included columns can be edited from this view or under Preferences > View/Reports > CMA tab > CMA Summary.
Comparable Property Statistics

The Comparable Property Statistics Report is a list price comparison report of all properties included in the comparable, and displays the results in a chart format. The report orientation can be edited by clicking on the Chart Options link and selecting the attributes.
Comparable Price Analysis

The Comparable Price Analysis Report is a list price comparison report based upon the Low, Average, High and Median list prices, and displays the results in a chart format. Like the Comparable Property Statistics, the report orientation can be edited by clicking on the Chart Options link and selecting the attributes.
The Map allows agents to add a map of the area with the properties appearing as a push pin or a house icon. The Map Report also includes a table with all of the listings displayed just below the map. The map can be edited to be zoomed in or out and increased or decreased in size.
Like the Cover Letter, Agent Resume and Company Info Letter, this report pulls the stored letter from Preferences > CMA > Manage Reports and Adjustments. Here an agent can modify the report on the fly before inserting into the CMA.
The Seller's Net Sheet is a tool to help the agent calculate an approximate closing cost and net cost to the seller. The report prints the data with a caveat at the bottom of the page emphasizing that the costs are an estimate. There are also spaces for the agent and seller to sign as an acknowledgement.
Step 7: Generate Presentation and Email

Generate Presentation
There are two ways to generate the presentation. One, click the Presentation Tab. Two, click the Generate Presentation button.

To generate the presentation, click the Presentation tab or the Generate Presentation button.

Email Presentation
To email the presentation, simply click on the Email link in the top right corner of the display window.
Note the new spell checker feature in the Compose E-mail window. In addition to the link, agents can type a message into the body of the email and add attachments (if necessary).