



Cloud CMA Course Notes

Cloud CMA

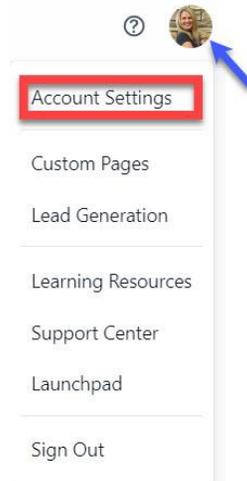
The Cloud CMA product is another option to create CMA reports, giving you several options for customization. Through Cloud CMA, you also have the ability to present your CMA as a slideshow.

Cloud CMA can be accessed either through the products and services page on Stellar Central (stellarmls.com), OR through search results in Matrix. The first time you access Cloud CMA, you will be prompted to create your free account.

In this case, after we select our comparable properties in Matrix, we will click the Cloud CMA button underneath the search results to launch selected comps into the four tabs of the Cloud CMA wizard.

Settings

It is very important to configure Cloud CMA settings. By clicking on the avatar on the top right corner of the screen (with either your photo or initials), there are options for Account Settings, Custom Pages, and Lead Generation.



Account settings:

- **Profile** – Name, company, email, photo, logo, and location.
- **Contact Info** – add a variety of contact info including license number, designations, social media pages, phone, web site, etc. *Anything added here shows up on the Cover Page and Contact page of the CMA.*
- **Custom Pages** – create or upload custom pages to go in the CMA.

As Cloud CMA is integrated with MLS subscriptions, the password, MLS Credentials, Integrations and Billing tabs are not used.

Creating a CMA

- You will start you CMA using Matrix and select properties from your results tab
 - Go To Matrix and select Properties from Residential Search
 - Residential > type in 17550 Terrazzo Way (select address)
 - Radius mile
 - SFR
 - Price 450-550
 - 4 beds
 - 2+ Bath
 - Sq ft 2500-3500
- Select the properties and choose Cloud CMA on your actions tab at the bottom
- You will be taken to Cloud CMA where you will enter information for your CMA using the tabs below

The screenshot shows a real estate software interface with a table of properties. The table has columns for Distance, #, ML #, Status, Address, City, Zip Code, Subdivision Name, SqFt, H, and Current Price. The 'Cloud CMA' button in the bottom navigation bar is highlighted with a red box.

Distance	#	ML #	Status	Address	City	Zip Code	Subdivision Name	SqFt	H	Current Price
1.6 mi	1	T3420021	ACT	19145 TAVISTON DR	LAND O LAKES	34638	CONCORD STN PH 5 UI	2,946		\$575,000
2.6 mi	2	T3419750	ACT	19764 BLUE POND DR	LUTZ	33558	PARKVIEW AT LONG LP	2,359		\$629,899
0.6 mi	3	T3401645	ACT	18068 RAMBLE ON WAY	LAND O LAKES	34638	BEXLEY SOUTH 4-4 AN	2,731		\$643,338
0.5 mi	4	U8171871	ACT	3710 DUKE FIRTH ST	LAND O LAKES	34638	BALLANTRAE VILALGE	2,685		\$649,900
0.8 mi	5	O6068194	PND	3795 MORGONS CASTLE CT	LAND O LAKES	34638	CONCORD STN PH 2 UI	2,441		\$550,000
2.6 mi	6	U8182572	PND	19805 LONG LAKE RANCH BLVC	LUTZ	33558	LONG LAKE RANCH VIL	2,612		\$625,000
0.7 mi	7	T3379658	PND	17992 RAMBLE ON WAY	LAND O LAKES	34638	BEXLEY SOUTH 4-4 AN	2,731		\$637,101
2.2 mi	8	T3411028	PND	15482 SWEET SPRINGS BND	ODESSA	33556	SOUTH BRANCH PRESE	2,756		\$639,000

Criteria Tab:

- In the *Name the Report* section, enter the contact's name and enter any private notes. The Private Notes are only for you and do not appear in the final report.
- Enter the *Subject Property* address. This will autofill from Google Maps and will auto populate some information (bedrooms, bathrooms, square footage) from public records. You may upload a property photo. If no photo is uploaded, an aerial photo will be used. Under "Advanced Info" you can enter some additional characteristics.
- Under the *How do you want to get comparative listings?* section, you have various options. You can enter MLS numbers (if Cloud CMA was launched from a Matrix search, they are automatically populated), or you can do a "Quick and Dirty" search. The "Quick and Dirty" search pulls listings within a close proximity of the subject, and you can set the number of listings to pull along with a timeframe. This gives very limited search filters and may not result in the best comps.
 - Subject Property area
 - Property Address
 - Beds example: 4
 - Baths example: 3
 - Sq Ft could be a range
 - Property Sub type Single Family Residence
 - Add Photo front of house

Subject Property

Address

Beds Baths Sq Ft

Property Type
 Residential

Property Sub Type
 None

Property Photo

> [Advanced Info](#) Additional subject info used in four column layouts

- Click “Fetch Listings”. This takes you to the “Listings” tab.

Listings Tab

- *Comp Listings* can be sorted by status, bedrooms, bathrooms, list price, days on market, etc. They can also be reordered by clicking on the icon to the left of the listing.
- On the *Map*, the Subject property is purple, active listings are green, sold listings are red, pending listings are yellow, etc. You can click on each pin to get details.
- In the *Summary of Listings* area (right side of screen), you can see the count of listings in each status along with a total summary of prices.
- In the *Subject Property* area, you can enter a suggested price by clicking the pencil icon.
- There is also a section with each *comparable* listing, and a link to the MLS information and photos for each listing. You can deselect comps and make adjustments here as well. In Cloud CMA, adjustments are not made by particular fields. Just enter text for what you are adjusting and then enter a positive or negative value.
- The adjusted value will update the summary statistics.
- Click on Customize Report, which takes you to the Customize Tab.

Customize Tab

- This is where you determine the look and composition of your CMA.
- The *My CMA Report* shows the default settings of what will show up in the report. Any of these pages can be removed by hovering over the page and clicking the ‘-’ icon. Several of these pages (such as the Cover Letter, Agent Resume, and Our Company pages) can be personalized by clicking “edit”. Any of these can be reordered hovering over the page and dragging it.
- To the left, there is an *Additional Report Content* area where additional pages can be added to the CMA. Note that the Online Valuation Analysis page compares the suggested list price to the Zillow Zestimate value. Several static reports are also available.
- If you go to *Templates*, you will find a variety of premade templates which include certain pages. These templates include All Pages, Appraiser’s Report, Buyers CMA, Comps Only, Prelisting Package, and Follow Up Report. You can also create and save a “New” template here.
- There are also various options for *themes* (colors), *layouts*, and *fonts* available as well.
- This takes you to the CMA tab with all published CMAs in descending date order (with the recently created CMA first). There is an option to view the CMA as both a PDF and as a slideshow, along with an option to “Edit” the CMA. Remember, in the future, this page can be accessed by going directly into Cloud CMA and then to the “CMA” tab. By clicking the menu icon on the top corner of a CMA (three dots), there is an option to copy the link of either the full report or of a slide show, or to email the report or slideshow directly. There is also an option to delete the CMA.

Publish Report

- Once the report is published you can view PDF or live format
- You can also send the report via email using PDF or link

Quick and Dirty CMA

- You will start by adding a CMA from your CMA tab
- The main difference will be on the criteria tab, instead of entering MLS ID numbers or selecting properties in Matrix, you will select Automatically find listings under the Quick and Dirty
- The steps and tabs are the same as a regular CMA
- Name the CMA and add the complete the rest of the information:
 - Property Address
 - Beds example: 4
 - Baths example: 3
 - Sq Ft could be a range
 - Property Sub type Single Family Residence
 - Add Photo front of house
- Quick and Dirty choose the Automatically Find Properties near the Subject Property. You may change number of properties. Example from 10 to 20 properties. Select how far back you want the system to pull the properties. Example: click on dropdown arrow and choose 3 months. Select more criteria and fill in:
 - Beds example: 4
 - Baths example: 3
 - Sq Ft could be a range
 - Lot size
 - List Price
 - Fetch Listings

Quick and Dirty

by Proximity
 Automatically find listings near the Subject Property

Get at least 10 listings

Only go back 1 year for off market listings

Additional subject info

Beds	-	Baths	-
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Sqft	-	Lot Size	-
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
List Price	-		
<input type="text"/>	<input type="text"/>		

This method automatically brings back listings closest to the Subject Property.
Tip: Get more listings than you need - you can filter out listings that are not good comps in the next step.

- Complete the CMA as listed above