

Instructions: Simply click on the link to view an explanation of the help topics listed below.

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Select a Presentation

Review your Agent Profile in the table on the left. If the information is accurate, select the type of presentation you would like to create from the list on the right and click **Begin**. If you would like to retrieve a presentation you have already saved you may choose it from the list of presentations. The saved presentations are highlighted in blue and can be found in the list of presentations under the corresponding listing. If you do not see any saved presentations it means you do not have any. Keep in mind presentations save for 30 days and will be removed from the list upon expiration.

The links below the Agent Profile allow you to:

- View/Print the Startup Guide to help you become familiar with the service.
- Edit your Agent Profile.
- Review and edit your resume.
- Review and edit your customer references.
- Edit the program settings.
- Delete Saved Presentations & Flyers.
- Re-Install ToolkitCMA.

Agent Profile

The Agent Profile screen displays your personal information. You can change any part of it you wish, except for your name. The information will print out exactly as entered. Using proper capitalization is recommended (example: John Smith). Use the [TAB] key or mouse to move from field to field.

Your agent photo and contact information will print on most Toolkit presentation pages. The location and size of the agent picture will be the same on every page. The contact information includes your office phone number and up to four (4) other items, such as home phone, direct phone, beeper, pager, e-mail, fax number, Web Site, or any other item you desire.

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Add/Change your Agent Photo

There are some items you should be aware of before inserting your agent photo into the Agent Profile. The image file will be uploaded to ToolkitCMA.com's server so that it will be available at any Internet-connected computer you use. In order to upload the agent photo, it must be scanned and saved on your computer's hard drive, on a floppy disk, or available via a local area network (LAN).

In order to create the photo you can use a scanner and/or a digital camera with graphics software. Realty Tools, Inc. can not provide assistance with scanning photos, using scanners, digital cameras or graphics software. Please consult your documentation for these items should you require assistance.

ToolkitCMA.com will accept the following image formats (file extensions are given in parentheses): JPEG (*.jpg), and CompuServe GIF (*.gif). JPEG is the recommended file format, as it offers the best compromise between file size and image quality. Since your photo must be downloaded to any computer you use to do a presentation, you will want your image file to be as small as possible without losing image quality. The image will be no bigger than 2 inches wide by 3 inches tall on the documents you will be printing. The actual file size of the photo will need to be 2 MB (2,048 KB) or smaller. Keep this in mind when converting your photo to a graphic.

If the image is not in one of the permissible formats, then you must convert the image using graphics software. Simply changing the file extension may render the photo unusable. Realty Tools, Inc. cannot provide assistance with image conversion.

Uploading Your Photo

If you would like your agent photo to print on the presentation pages complete the following steps:

1. Click the Browse button located next to the empty text box and locate where the photo you want to use is saved.
2. Next, click Open and the photo should appear at the top of the screen.
3. Click the Upload button to upload the photo to the ToolkitCMA server. If you have browsed correctly to the photo it will be displayed under "Your Current Photo".
4. Click on the Done button.

If you would like to remove your agent photo from your profile, click the Delete button at the bottom of the screen.

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Change Registered E-mail Address

You may change the e-mail address you use to sign-in to ToolkitCMA by clicking the link 'Change your Sign-in E-mail Address'. Enter your old e-mail address, your current password, and the new e-mail you wish to use. Then click the Submit button.

This will not change the e-mail that appears on your agent profile or on your presentations. You must edit your agent profile in order to change that e-mail address.

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Saved Presentation & Flyer Manager

This page allows you to manage your saved presentations and flyers. You will see a list of all saved items. Simply check off the box next to the saved flyer(s) or presentation(s) you wish to delete. Then click "Delete Selected" and click "OK" on the pop up box that reads "Are you sure you want to delete the selected saved items?" to confirm the deletion. The selected Presentations or Flyers are then permanently deleted.

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Change Password

You may change your login password by clicking the link titled 'Change Your Password' from the Select Presentation screen. Keep in mind that ToolkitCMA.com passwords must be 6-12 characters long and are not case sensitive. For example, MyPassword and mypassword would both be accepted. If you should happen to forget your password, a link is provided on the Sign In page for you to retrieve your password.

When changing your password, you will be asked for your current password. This is to prevent an unauthorized user from changing your password. You will need to enter your new password twice to confirm.

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Agent Resume

Enter your personal resume data. Information will print out exactly as entered. Using proper capitalization is recommended (example: John Smith). Use the [TAB] key or mouse to move from field to field.

The Resume template allows you flexibility in changing Sub Headings 1-5. You may do so by highlighting the text and replacing it with your own text. The sub-headings should be kept short to prevent them from running into the detail text on the printed resume.

The agent photo will print on your Agent Resume if so desired. You can select to display your photo on the left or right side. You can also choose not to display a photo. Please follow the instructions under Agent Photo for inserting an agent photo.

Use the 'Click to Preview' link at the bottom of the page to preview your resume before saving or printing it. Entering too much information (more than 64 characters per line) may cause alignment issues when printing.

Click Save to save your changes. Click Clear to clear the contents of the Resume template. Click Cancel to exit the Resume template without saving any changes.

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Customer References

Enter your customer references. Information will print out exactly as entered. Using proper capitalization is recommended (example: John Smith). Use the [TAB] key or mouse to move from field to field.

The References template allows you flexibility in changing Sub Headings 1 & 2. You may do so by highlighting the text and replacing it with your own text.

Use the 'Click to Preview' link at the bottom of the page to preview your references before saving or printing. Entering too much information (more than 64 characters per line) may cause alignment issues when printing.

Click Save to save your changes. Click Clear to clear the contents of the References template. Click Cancel to exit the References template without saving any changes.

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Program Settings

You can customize some of the calculations ToolkitCMA. com performs. The following options can be changed:

- **Recommended Price Calculations Settings:** If your listing presentation includes the Recommended Pricing Page, this setting determines how ToolkitCMA. com calculates the recommended price.
- **Use only Summary CMA Average:** Calculates the recommended price range from the average price shown on the Summary CMA. You have the option of calculating the recommended price range using only sold properties or all statuses. Check the appropriate box.
- **Use Price Adjusted CMA Average:** Calculates the recommended price range values from the Price Adjusted CMA rather than the Summary CMA. There is also an option to revert to the Summary CMA average if no Price Adjusted CMA is included in the presentation.
- **Range:** Allows you to set percentages for the upper and lower bounds -used to calculate the recommended price range. For example, if the low bounds % and the high bounds % are 5.00 and the calculated average based on your selected properties was \$100,000, the recommended low would be \$95,000 and the recommended high would be \$105,000.
- **Rounding:** Allows you to customize the precision of results calculated by ToolkitCMA. com.

- **Printing Options - CMA Page Break Option:** When checked it creates a separate page for each listing status. For example the first CMA page will contain one status such as Actives while a second CMA page will display a second status such as Solds.

- **Printing Options - Property Sort for CMA Output:** You have the option to sort the properties by price either ascending or descending when printed. Use the down arrow to choose which way you would like the listings sorted.

- **Printing Options - Always Show Printer Setup Options on Print:** When checked you will be prompted with the printer setup options box every time you print a CMA. Some agents like the ability

to change the print options such as color versus black and white or print quality everytime they print a CMA. With this option selected the print options will always pop up when sent to the printer.

Click **Save** to save your changes. Click **Reset to Default** to reset all options to default. Click **Cancel** to exit Program Settings without saving any changes.

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Selecting Documents

This screen displays the names of all the individual documents you may include in your presentation. A check mark in the box beside the document name means that it will be included in your current presentation. Many documents are pre-checked by default, and you may add other optional documents or exclude documents from your presentation at your discretion by simply checking or unchecking the box to the left of the document name. Choose only non-CMA pages if you want to print presentation pages that do not require you to Access the MLS.

The 'Check All' 'Reset' and 'Clear All' Buttons

Use these buttons to select all pages, reset the selected pages to the presentation's default settings, or clear all pages, respectively.

The 'Make Default' Button

Use this button to customize the default state (*selected* or *not selected*) of the documents in this presentation. The next time you select this presentation on the previous screen, these documents will be selected. *This button is not available to DEMO users.*

Your Resume and Customer References

If the presentation you selected on the previous screen includes the Resume and/or Customer References, the checkbox for these pages may be disabled. This is the case if you have not yet entered your resume and/or references information. A link is provided next to each of these documents to allow you to enter the data at this time.

Click **Next** to continue to the next screen.

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Prospect Information

Enter the prospect's information here. The date field is automatically generated from your computer's date/time settings. You may edit the date by selecting it and retyping the date you would like for the presentation. You do not need to type the word dear in the salutation field, because the presentation cover letters already contain the salutation dear. The Presentation information will print out exactly as entered. Using proper capitalization is recommended (example: John Smith). Use the [TAB] key or mouse to move from field to field.

Click the Last Prospect button if you would like to retrieve the information from the last prospect. This saves you valuable time from retyping the prospect information. If you would like to clear all of the information in the Prospect Information then click Clear. Click Next to continue to the next screen.

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Customizable Cover Letter

Compose the cover letter to include in your presentation. After making changes use the 'Click to Preview' link at the bottom of the form to see how your letter will look when printed.

'Clear' Button

Use this button to clear the contents of the form and start from scratch.

'Reset to Default' Button

Clicking this button will reset the default cover letter it's original text, removing any changes you have made to the default.

'Save as Default & Next Button'

If you have made changes to the cover letter that you would like to use in future presentations, clicking this button will save these changes on the ToolkitCMA. com server and advance you to the next screen. The next time you do a customizable cover letter your changes will be used to initialize the form.

'Next' Button

When you have finished composing your cover letter, click this button to continue with your presentation.

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Load Listings

If any of the presentation documents selected require MLS property information you will see this screen. How you download property data can vary greatly depending on your MLS. If your MLS is Internet-based you will see an 'Import Property Data' button.

How Do I Download?

Step-by-step instructions for downloading property data from your MLS are provided in the MLS Access Guide. You may print a copy of your MLS Access Guide by clicking on the 'How Do I Download?' link. This link will print the access guide for the currently selected MLS interface. If more than one MLS interface is listed be sure to select the one for which you wish to print the access guide. It's highly recommended that you print the guide before accessing the MLS and use it to familiarize yourself with the download procedure.

Import Property Data

If your MLS is Internet-based, clicking on the Import Property Data button will open another browser window displaying the home page for your MLS. Use this window to conduct your property search according to the procedures outlined in the MLS Access Guide. When you close this window your listings will be loaded into ToolkitCMA. com. If your MLS is not Internet-based you will need to manually start your MLS client software and download the listings. Step-by-step procedures to accomplish this are provided in the MLS Access Guide (How Do I Download? link). Once you have the listings saved, click on the Import Property Data button to load the listings.

Use Existing Properties

If you have already downloaded properties during your current ToolkitCMA. com session you will see a Use Existing Properties button. If you would like to use these same properties, without loading any new ones, you can skip the load listings properties by clicking this button. *NOTE* Property data is not saved from one session to the next. Once you sign out of ToolkitCMA. com, any property information you have downloaded from the MLS will be cleared.

Property Limit

There is a limit to the number of MLS property listings that can be loaded into ToolkitCMA. com at

one time. The actual limit is specific to the MLS interface, but most of them are set to 40 properties. If you attempt to download a number of properties that will cause this limit to be exceeded the MLS interface will stop loading listings. For example, if the limit is 40 properties, and the export file contains listings for 50 properties, the MLS interface will only load the first 40 listings.

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Select Properties

This page shows the properties available for you to include in your presentation. Select the properties you want to have included in your CMA's by placing a check mark in the corresponding boxes.

Property Photos

If there is a camera icon in the **Photo** column, then there is a property photo for that property. If there is no camera icon the MLS had no photo available for that property.

Viewing Full Property Detail / Editing Property Data

Clicking the icon in the **Details/Edit** column will display more detailed property information, including the property photo, for that property. You can use the **Prev** and **Next** buttons to navigate through all of the properties. Use the **Mark (Unmark)** button to toggle the selections state of the current property.

Editing Property Data

Click the **Edit** button on the detail display to edit the property data. When editing property data, the *Address* and *List Price* fields are required fields. When you have finished editing the property, click the 'Save' button.

Adding a Property Manually

If you want to add a property manually, click the 'Add a Property' link at the bottom right of the property grid. This will display an empty property detail form. When you have finished entering the property data click the 'Save' button to add the property. Properties you add manually will be displayed in the property grid with 'NON-MLS' in the **MLS Number** column.

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Select Fields for Summary CMA

This page allows you to choose which fields you would like to display on your Customizable Summary CMA. Simply click once on the desired fields in the Available Fields box on the left and then click on the "->" arrow to move them to the Selected Fields box on the right. If you decide that you would like to remove some fields, simply click on the field in the Selected Fields box on the right and click on the "<-" button to remove them from your list. You can also set the order in which the selected fields appear. Simply click on a field once to highlight it, and then click on the up or down arrows to move the field to where you would like to have it listed. The fields you select will be displayed on the Customizable Summary CMA.

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Entering Your Subject Property

Use this page to enter details about the subject property. If the subject property address you entered

on the Prospect page is the same as your last subject property, the form will be initialized to the last values you entered.

To insert the subject property photo, click Browse and locate where the photo is saved. Next, click Open and then click Save. If you have browsed correctly, the photo will be displayed. If you want to enlarge the picture on the screen, then select click to enlarge. If you want to make the picture smaller, then select click to shrink.

Click Next to continue to the next screen.

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Price Adjusted CMA

The Price Adjusted CMA allows you to compare a property to several others in the same area/neighborhood. You must decide the value for features such as the number of bedrooms, etc. and add or deduct the amount(s) accordingly.

Enter the dollar amount of the adjustments for your comparables (Negative adjustments are denoted by a minus sign before the number, ex: -500). Keep in mind, this page only accepts whole numbers; do not type dollar signs, commas, or decimal points.

The adjusted totals will automatically be calculated. Use the [TAB] key or mouse to move from field to field.

Click 'Next' to continue to the next screen.

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Pricing Strategy Worksheet

Use this page to explain the reasoning behind price determination. The default text of the third section has an area for the suggested price range and should be changed before continuing.

Use the 'Preview' link to ensure changes will fit on the printed page.

Click 'Next' to continue to the next screen.

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Estimated Net Proceeds Worksheet

Use this page to determine the estimate amount the prospect can expect to net when their property is sold at the market price. Keep in mind, this page only accepts whole numbers; do not type dollar signs, commas, or decimal points.

Use the 'Preview' link to ensure changes will fit on the printed page.

Click 'Next' to continue to the next screen.

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Marketing Plan of Action

The Marketing Plan of Action allows you to plan an itinerary for marketing a property. Enter your marketing plan of action for your prospect's house. This information will be used on printed material as a part of this presentation. Use the [TAB] key or mouse to move from field to field.

Click Save to save your changes. Click Clear to clear the contents of the Marketing Plan template. Click the Next button to continue to the next screen.

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Presentation Print Preview, Print & PDF

This screen will show you a summary of the property information that is included in your CMA.

Select the method of output for your presentation and hit the OK button. You may also choose the number of copies you wish to print by changing the number in the box. If the Prompt for Printer Setup option is checked you will be prompted with the Print Options box.

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Presentation Summary

The presentation summary shows you a list of the selected presentation pages, the prospect information, and the comparable properties (if applicable).

The two options on the presentation summary page are Print this Summary and Create Another Presentation. If you want to print a summary of the printed presentation pages click Print this Summary. If you want to create another presentation, then click Create Another Presentation.

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Save Presentation

You can click the "Save" button located in the upper right corner of your screen on any page of your presentation to save your work. You will be taken to a screen that will require a name for the presentation and has the option to save or cancel. To save, simply click "Save" and wait for the page to refresh to ensure your presentation has been saved. Save is not automatic. If you close ToolkitCMA.com without saving, your work will be lost.

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Send PDF E-mail

This page allows you to email a PDF version of your presentation. Simply fill in the email address(es) to which you would like to email the presentation (ToolkitCMA.com automatically fills your email address into the "CC" field so you have a copy) and compose a message. ToolkitCMA.com automatically inserts a link into the email for the recipient to click on to view the presentation. When you have entered at least one email address, enter a subject and compose a message, click the "Send Email" button and your presentation will be emailed!

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Desired Home Profile

This page allows you to enter details for the desired home. Simply click into each field and add a brief description. The information will appear exactly how it is written.

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E-mail Presentation: Review

This page summarizes your presentation. Review the information on the screen and then click Continue to proceed to email a presentation.

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E-mail Presentation: Send E-mail

This page allows you to email your presentation. Simply fill in the email address(es) to which you would like to email the presentation. ToolkitCMA.com automatically inserts a link into the email for the recipient to click on to view the presentation. When you have entered at least one email address, enter a subject and click the **“Send Email”** button and your presentation will be emailed. You may also click the **“Preview”** button to preview the presentation before sending the email.

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Property Flyers: Select Flyer

Choose Select a Flyer and click the Begin button

Choose the flyer you want to create and click the Create this Flyer button

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Property Flyers: Create a New Flyer

Unless you used the ‘Manual Entry’ option on the Load Listing page, the flyer form will be initialized with property data. Be sure to review this data before printing the flyer.

Tips for an Attractive Flyer

- The flyer will look better if you fill in all of the fields on the form.
- Use proper punctuation and capitalization.

Headlines

Headlines are phrases that are usually rendered in large, bold-faced type on the flyer. There is a list of standard headlines to choose from by clicking the ‘Sample Headlines’ link, or you could type in anything you want.

Bullets

Enter the key features about the property that you wish to be included in the flyer. The field labels should be used as a guide for the type of information to include in the flyer. The labels will not be

printed on the flyer. For example, if the field label is 'Beds:' and the property has 4 bedrooms, you should enter '4 Bedrooms' in that field. If you enter only the number '4', then only the number '4' will print on the flyer, and the reader will not know what it means. Keep in mind that you do not have to use the field labels when creating a flyer. You may type any data you want in to the fields.

Remarks

Type in a description of the property. You are not limited to the amount of text you can type into a **Remarks** field, typing large amounts of data may cause the text to run into other areas of the flyer when it is printed. To prevent this from happening you should use the **Preview** function.

Photos

You can either use the property photo from the MLS, if any, or a photo located on your computer. To select a different photo, click the 'Browse' button and locate the graphic file.

Printing

Select the method of output for your Flyer and hit the OK button. If you are printing the flyer you may also choose the number of copies, up to 10, to print.

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