



CMA - Create a Presentation: Subject Property/Client Tab *Quick Start Guide Paragon 4.0*

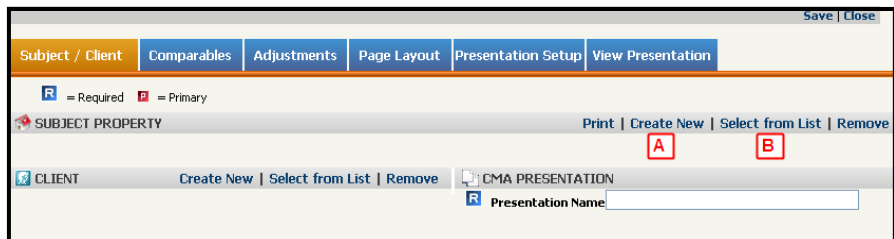
The Comparable Market Analysis tool in Paragon is very robust. It gives you several different levels of creating a CMA. Some prefer to have a CMA that is comprised of the subject property of the seller and the comp listings. Some prefer to have a more complete CMA presentation packet that includes a cover page, cover letter, subject property, comps, agent background info and picture, office background info and logo, data summaries, graphs, and a closing page. Or any combination of information pages to customize their presentation. This guide will focus on these modules and creating a full CMA Presentation.

To create a presentation packet, start with the CMA control panel. Click **Create Presentation**.



There are 2 different ways to create a Subject Property.

- A. **Create New:** Enter the Subject Project like adding a new listing.
- B. **Selecting from List:** select any MLS # in the Paragon database.





A. **Create New** method

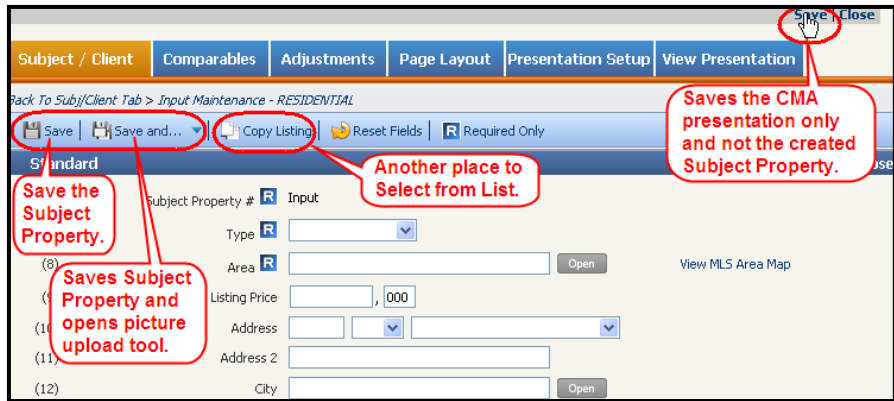
Click **Create New** and then select the Property Class of the Subject Property and click **Apply**.





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A data input screen will appear that allows you to put house information in as if it were a new listing on the MLS. Put in as much info as you have about the property. There are some fields that are required.  The better the data, the better the comparison. Once you have the data entered, click **Save**. 



Clicking on **Copy of Listing** will give you 2 options to copy listings. Paragon will ask what **Type of Listing**

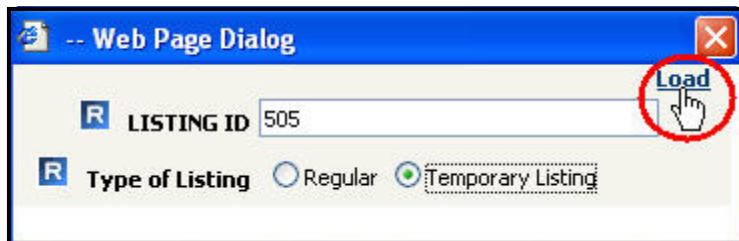
1. **Regular:** Any MLS #
2. **Temporary Listing:** (a temporary listing you have entered)

After entering the listing number, click **Load**.

You will see a listing input screen similar to the one above. Make any needed changes and click **Save**.



Note: If you copy the listing, if there are changes on the original MLS #, those changes ARE NOT changed in your Subject Property.





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B. Selecting from List

If you **Use Temp Listings**, you will see a list of your own temporary listings and MLS numbers.

If you **Use MLS #**, you will need to enter the specific MLS # to use. There is no search function to find an MLS #. If you use an MLS number, if there is a change in the listing, the Subject Property will also change.

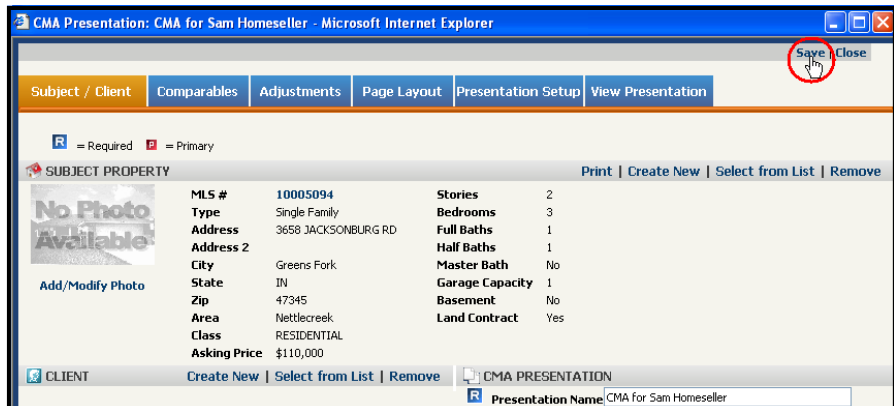
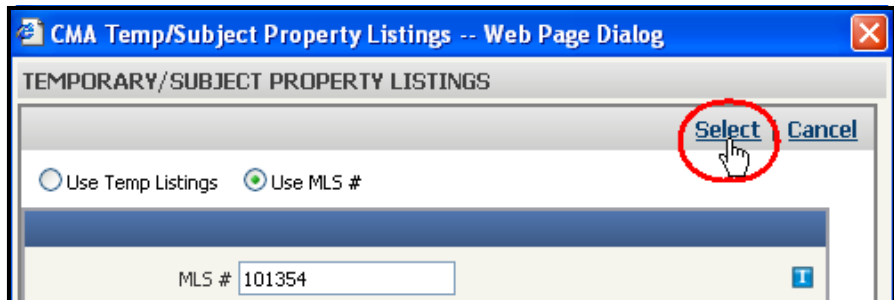
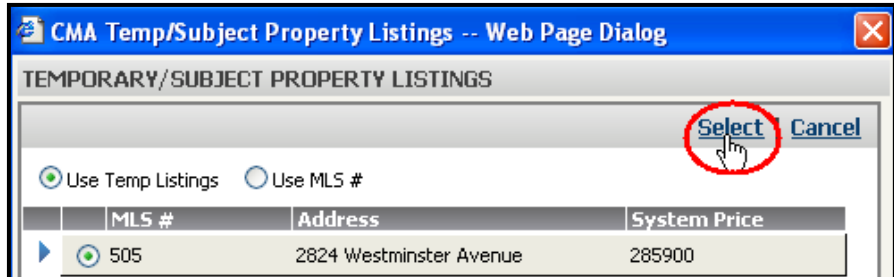
Click **Select** to load listing data into your Subject Property listing.

You will **NOT** be able to make any changes to the selected listing. It is not your listing and it will be updated, when the listing agent changes the actual MLS#.

Note: If you use the Copy Listing function (already discussed), you can edit listing data.

Give your CMA a name and click **Save**.

The CMA will display the actual MLS# for the Subject Property.





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The Subject Property info will fill in the space after the header. If you copied a listing or entered your own Subject Property, you can click **Add/Modify Photo** to access the picture admin for this temporary listing and add photos. The system will give you a temporary ID number. This property is not on the MLS yet, so no one can see it but you.

There are 2 ways to associate a Client to a CMA.
Create New or **Select from List**.

- 1. Create New:** Click **Create New** and A Contact Manager General Info Tab box will open. Fill in the contact info the same as in the Contact Manager Quick Start Guide. Then click **Save this Contact**.
- 2. Select from List:** Click **Select from List** and choose from the list of existing contacts.

The contact info will appear in the Client/Subject Property tab in the section under the Client header.

The system will auto fill a Presentation Name using client info. "CMA for" is not required text.



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Now you can see the first stages of the information that will come together at the end which will create your presentation.

With your information entered, click **Save**.

Tip: The more information you input in the subject property, the better your seller can compare their house with the comps.

Tip: The information you put into the Contact Manager like name, address, etc. will be merged into other parts of the presentation later automatically. Now you are ready for the **Comparables** tab.

The screenshot shows the 'Subject / Client' tab in the Paragon 4.0 software. It features a navigation bar with tabs: 'Subject / Client', 'Comparables', 'Adjustments', 'Page Layout', 'Presentation Setup', and 'View Presentation'. Below the navigation bar, there are sections for 'SUBJECT PROPERTY' and 'CLIENT'. The 'SUBJECT PROPERTY' section includes a photo of a house and a table of details: MLS # Temp-505, Type Single Family, Address 2824 Westminster Avenue, City Richmond, State IN, Zip 47374, Area Southeast, Class RESIDENTIAL, Asking Price \$285,900. Other details include Stories 1.5, Bedrooms 4, Full Baths 3, Half Baths 0, Master Bath Yes, Garage Capacity 2, Basement Yes, and Land Contract No. The 'CLIENT' section shows Client Name Sam Homeseller, Home Address 2225 Charleston Place, Home Phone (913) 690-0000, and Home Email Randy.Realtor@FNRES.com. A 'CMA PRESENTATION' section has a 'Presentation Name' field with the value 'CMA for Sam Homeseller'. A 'Save' button is circled in red in the top right corner.

Subject Property Print

When you click on the **Print** button associated with the Subject Property, Paragon will open the Print+ function window. This will allow you to select as many different Views/ Reports (Listing Details Sheets) as you want. You and then either send the print job to the printer or preview the print job.

This screenshot is identical to the one above, showing the 'Subject / Client' tab. The 'Print' button, located to the right of the 'SUBJECT PROPERTY' section, is circled in red.

The screenshot shows the 'Print+' function window. At the top, there are radio buttons for 'SELECTED (1)', 'ALL LISTINGS(1)', and 'CURRENT LISTING(#-505)'. Below this is a 'Views' dropdown menu set to 'All'. A list of views is shown: Custom Brochure 2, Custom Detail, Custom Detail #2, Default MLS Defined Spreadsheet, and Firm Inventory. To the right, there is a 'Print Selection' area with 'All Fields Detail' and 'Custom Detail #2' selected. Buttons for 'ADD ->', '<- REMOVE', and 'REMOVE ALL' are visible. The 'Send To Printer' button is circled in red.