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GETTING STARTED
Go to http://amwbeta2.collateralanalytics.com/ and login with your username and password.

Click on My Profile in the navigation bar.

Complete all necessary fields of profile information. When fields are complete, press Update.

Popup window will appear notifying you that your User Profile has been updated. Click OK. You will then be redirected back to the previous page in Step 2.
CLIENT INFORMATION

1. If you have saved a CMA report, click Get Saved CMA to retrieve it.

2. Fill out your client’s first name and last name as instructed.

3. Also enter in their property’s address and city, state or zip code information (if you are not sure of the required format of the city, state entry, click the ? for further instructions).
   Example: Los Angeles, CA

4. Click on the Start button.

5. When this image is displayed, the system is processing the information and may take a few minutes to load.
After you’ve clicked on **Start**, you will be directed to the page with all of the information available for your client’s property, such as sales history, **Market Trends**®, property photos, and a list of comparable properties.

A system-generated AVM value will appear for the property. In addition, ranges (+ or - 5%) of the AVM value will be displayed as well as list price range (+ or - 5% from the value range). The ranges can be adjusted late in the program. The changes in market conditions over the last 12 months also displays.

If you would like to see an enlarged view of a **Market Trends**® graph, simply click on graphic and a separate window will be displayed. To close window, simply click on “x” in the upper right corner.

Additionally, if you would like to see more detail on the comparable properties, you can simply click on any of the thumbnail property photos. When a photo is clicked, a small window will appear containing all of the available information on that particular property. To close window, simply click on “x” in the upper right corner.

Click the **Customize CMA** button at the bottom of the page.
SIMPLE CUSTOMIZED CMA
CUSTOMIZABLE OPTIONS: SUBJECT PROPERTY

1. Check all options that you would like to be customizable for your CMA. If the subject property has more custom features and amenities than most properties, check Simple for even more customization. Otherwise, checking Simple will be satisfactory for most properties. Then click Continue.

2. If there are any mistakes in any of the customizable fields, you are able to change them.

3. If you have a photo of the property that is not on the MLS, you may upload one here by clicking on the Add Subj Photo button at the bottom of the page.

4. Once you have finished customizing any information and/or adding any photos, click Continue at the bottom of the page.

5. You can click the Start Over button or Back button at any time.
CUSTOMIZABLE OPTIONS: LETTERS

1. On this page you have the option of customizing your cover letter. To begin, click on the small pencil below Customize Letters.

   Please Note: You cannot paste text from a Word document into the letter editor. The best way to customize a cover letter is to save a final version as a PDF on your desktop and follow Steps 5-6 on page 11 for a proper upload.

2. Here you have the option to customize any part of your letter. You can increase the font size, change typeface, insert custom text, etc. Once your custom letter is complete, click on the button to save your work. Then click Continue.

3. If you are not happy with your customization and would like to start over, simply press the button. This will take you back to Step 1 where you can click on the pencil again to customize your letter, once again.

   Please Note: Once you save your changes, this “undo” option will not revert the letter back to its original format and content.

4. Once you have saved your work, you will be directed to a page similar to that of Step 1 to preview your letter. If you are satisfied with it, click Continue to move on to the next step.
CUSTOMIZABLE OPTIONS: MARKETING PAGES

1. Here is where you are able to choose which marketing pages you would like to be included or omitted in your presentation. Simply check what you want and uncheck what you don’t!

2. The first option, Cover Page, gives you the option to choose a cover which represents 1 of 8 different Southern California regions for your presentation. Click Select. A small popup window will appear containing a drop-down menu with the different cover options. Choose one, and click Select again.

3. The last option, Custom PDF Content, gives you the option to upload any custom pages you would like to be added to your presentation. By checking the box, another popup window will appear where you will be able to upload your file(s). Once you have chosen your file, click Upload files.

4. When you are complete with customization of pages, click Continue.
CUSTOMIZABLE OPTIONS: MARKETING PAGES (cont’d)

5 To upload your custom letter, uncheck the Client Letter option. Select the Custom Client Letter option. You are then directed to upload user content section in PDF format.

6 Navigate to the custom letter on your desktop (it must be PDF format). Click Upload Files. Your custom letter has now been included as part of the CMA.
1 This page allows you to select comparable properties by customizing your search criteria. Default criteria has been provided based on the subject property and AVM value generated.

2 If you have already done your research and have chosen the comparables you want to show in your presentation, you can enter in the MLS numbers (separated by commas) in the field, and then press Get Listings.

3 If you do not know of specific comparables, simply customize the search criteria in the Comparative Market Analysis Criteria section.

4 Click Continue.
CUSTOMIZABLE OPTIONS: COMPARABLES (cont’d)

5 Once the comparables for your subject property have loaded, you can look at their details by clicking on their property photo thumbnail to determine if they are legitimate comparables or not.

6 If any of these properties are not comps that you wish to include in your presentation, simply uncheck the check box for those properties.

7 If there is a property you want to include that is not listed in the MLS or just was not found in the system, click Add Comp to add this property to your list of comparables.

8 Click Continue.
CUSTOMIZABLE OPTIONS: ADJUSTMENTS

1 On this page, the system has processed the comparable properties and has given suggested ranges of valuation and list price for your subject property. In the Adjustment fields, you can customize the addition or subtraction of value that these adjustments will impose on your subject property in comparison to these comparables.

Example: If property is located close to a loud street, you would insert a negative value.

2 While the system generates a value range (+ or - 5%), it is important for you to input ranges that you want the client to see. These adjusted ranges will populate to the home page of the CMA.

3 Once you are completed with your value adjustments, click Continue.

CUSTOMIZABLE OPTIONS: ESTIMATED PROCEEDS

1 On this page, add in any additional escrow fees, insurance fees, inspection costs, remaining mortgage, etc. The total of these fees and costs will be subtracted from the proposed selling price of the home, giving the client their Approximate Net Proceeds.

2 Click Continue.
You will be directed back to the original CMA page for your subject property. You will notice that the Agent Adjusted Estimated Value Range and the Agent Adjusted List Price Range have all been updated according the adjustments you had customized.

Please note the AVM value does not change.

You will also notice that the comparable properties on this main page have been updated according to the comparables you had customized.

To preview your CMA, click Preview CMA. Click Continue to return to previous screen.

To save your CMA, click Save at the bottom of the page. Save your CMA with a name that you will remember and then click Save Search. A menu popup will confirm CMA has been saved. Click OK.

To download your CMA, click Create CMA. Your CMA will be processed in the background and then will be sent to your email address that you have saved earlier to My Profile. A popup will confirm CMA email. Click Close.

Once you have received and opened the email, you should see a link that says Download CMA Now. Click the link. Your CMA should download as a PDF in just a few minutes!
DETAILED CUSTOMIZED CMA
CUSTOMIZABLE OPTIONS: SUBJECT PROPERTY

1. Check all options that you would like to be customizable for your CMA. If the subject property has more custom features and amenities than most properties, check Detailed for even more customization.

2. If there are any mistakes in any of the customizable fields, you are able to change them.

3. If you have a photo of the property that is not on the MLS, you may upload one here by clicking on the Add Subj Photo button at the bottom of the page.

4. Once you have finished customizing any information and/or adding any photos, click Continue at the bottom of the page.

5. You can click the Start Over button or Back button at any time.
CUSTOMIZABLE OPTIONS: LETTERS

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   Please Note: You cannot paste text from a Word document into the letter editor. The best way to customize a cover letter is to save a final version as a PDF on your desktop and follow Steps 5-6 on page 20 for a proper upload.

2. Here you have the option to customize any part of your letter. You can increase the font size, change typeface, insert custom text, etc. Once your custom letter is complete, click on the button to save your work. Then click Continue.

3. If you are not happy with your customization and would like to start over, simply press the button. This will take you back to Step 1 where you can click on the pencil again to customize your letter, once again.

   Please Note: Once you save your changes, this “undo” option will not revert the letter back to its original format and content.

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4. When you are complete with customization of pages, click Continue.
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If you do not know of specific comparables, simply customize the search criteria in the Comparative Market Analysis Criteria section.

Click Continue.
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7 If there is a property you want to include that is not listed in the MLS or just was not found in the system, click Add Comp to add this property to your list of comparables.

8 Click Continue.
CUSTOMIZABLE OPTIONS: ADJUSTMENTS

1. On this page, the system has processed the comparable properties and has given suggested ranges of valuation and list price for your subject property. In the Adjustment fields, you can customize the addition or subtraction of value that these adjustments will impose on your subject property in comparison to these comparables. If you are unsure of how to value a certain category, hover your mouse over the question mark button next to that category name.

   Example: If property is located closer to a loud street than a specific comparable property, you would insert a negative value in the field for that specific comparable property.

2. Changing the values (positive or negative values) in the Adjustment fields in Step 1 will change the totals at the bottom of each individual property column. Then the system calculates the average of these property column totals, attempting to give you a more accurate valuation of your subject property. This is the same method used by appraisers.

3. You are also able to further edit these range and valuation fields. These edits and values will appear on the home page.

4. Once you are completed with your value adjustments, click Continue.
CUSTOMIZABLE OPTIONS: ESTIMATED PROCEEDS

1. On this page, add in any additional escrow fees, insurance fees, inspection costs, remaining mortgage, etc. The total of these fees and costs will be subtracted from the proposed selling price of the home, giving the client their Approximate Net Proceeds.

2. Click Continue.
You will be directed back to the original CMA page for your subject property. You will notice that the Agent Adjusted Estimated Value Range and the Agent Adjusted List Price Range have all been updated according the adjustments you had customized.

Please note the AVM value does not change.

You will also notice that the comparable properties on this main page have been updated according to the comparables you had customized.

To preview your CMA, click Preview CMA. Click Continue to return to previous screen.

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Once you have received and opened the email, you should see a link that says Download CMA Now. Click the link. Your CMA should download as a PDF in just a few minutes!
glossary

Back: Clicking this button allows you to take a step backward to the previous step.
Create CMA: Click this button once you are ready to download your CMA report.
Customize CMA: Begin to customize your CMA report.
Help: Click this link if you need any assistance at any point in the CMA process.
Home: This is the root of all 5 sections: Wizard, Trends, C-AVM, I-AVM, and CMA.
Logout: Signs you out of the system.
My Profile: This is where you edit your personal/professional information.
Preview CMA: This button allows you to view your CMA, as is, before downloading a full PDF version.
Retrieve CMA: If you have saved a CMA in the past, clicking this button allows you to retrieve it and continue working on it.
Save CMA: If you would like to save the work you have done so far, click this button to come back to your CMA later.
Start Over: If you are not happy with your current CMA, by clicking this button you may start a new CMA from the beginning.