

ToolkitCMA[™] Startup Guide

Edit Your Agent Profile

Before you begin working in the ToolkitCMA[™] program, you will receive a prompt to verify or enter your contact and company information into the "Agent Profile" section. The details you provide on this page will be included in the signature lines and personalization of documents you create using the program for your clients to see.

	Agen	it Profile	🗙 To + 🔍 Support + 🛛 🖓 Angela
	Please provide the following information to be included in your pres-	entations and property flyers.	
VOULT	You	Your Company	
ces m	Agent Name	Company Name	
SoTo r O Su	Angela McKendrick	Standard	- BE
	Your name as it will appear in your presentations and flyers.	Office Address	E HE
	Title	123 Main Street	
	Agent	City, State Zip	
	This appears below your name on cover pages and letters.	Hunt Valley, MD 21030	marketing material is the internet.
	Designation(s)		
	CRS, GRI	Office Phone	
	These appear on presentations and flyers following your name	410-555-1234	
	REALTOR [®] Mark		
	REALTOR® ~		
	This appears following your name on the cover letter.		
	Additional Contact Information	ation	
	Examples: Cell number, email address	, website, FAX, etc.	an and the second
	Contact Method	Contact Information	
	Home Office.	410-432-7890	photo(s) can be

Reviewing your Preferences

After saving the Agent Profile information, you can click on your name in the top right corner for the Preferences. Here you can update several different preference options used throughout ToolkitCMA[™]. We suggest you begin by verifying your photo, resume and references that will appear in your materials.

Getting Started	Presentations	
Click on your name in the upper right corner to access the full preferences menu, to save your work, or to sign out. The G GoTo meu allows backward navigation withhout data loss. Use the O Support menu to access Help resources. Don't show this Recent Saves No recent activity found. Recent Shares	Competing presentations that provide you with attractive and effective, branded marketing and selling occasion – created on demand in more minutes via the Intern	Agent Profile Agent Profile Agent Photo ★ Web Reviews III Agent Resume EAgent References III Social Media Change Sign-in Email O Change Sasword Delete Saves ✓ Settings
No recent activity found.	Flyers	Customize Cover Page Photos Personal Pages
		Change Document Order My TabletCMA Sildes

Starting Your First Presentation

When you are finished with your preferences, you are ready to get started on your first ToolkitCMA[™] presentation. We recommend familiarizing yourself with this process well before you have an appointment with a client so questions, if any, can be resolved beforehand.

From the **'Home'** screen, click on the **Create Presentation** button. (If you are not already on the **'Home'** screen, you can get there by clicking **"GoTo"** and choose the page link for **Home**.) You will be prompted to select a presentation. Click on the type of presentation you'd like to work on and then click the **Create Presentation** button to proceed to the **'Documents'** screen.

	Se	lect a Presentation	≡ GoTo - O Support	t - 🕜 Angela -
No recent activit	Choose a presentation Listing Presentation Quick Market Analysis Listing Presentation CMA Only Presentation Buyer Presentation Buyer Presentation Buyer Presentation with CMA Buyer's Tour Letter Head Presentation Page Template Keep Data from Last Prospe	Ţ	S and effective, branded marketing material mand in mere minutes via the Internet. ston	
Recent Shares				
No recent activity four	10.	Flyers	_	
			AND AND AND	

The documents that are offered in selected presentation type will be listed below where it says "Available Documents". You can customize the information you provide your client with by selecting and unselecting pages from that list.

ToolkitCMA [™]		≡ GoTo -	O Support -	Angela -
Select the documer	ts for your <i>Listing Presentation</i> . Click the document name to toggle a preview. Set as Default Add/Reorder Pages Next			
	Listing Presentation			
	 Available Documents 			i
	Listing Presentation Cover Page Listing Pres. Cover Page wSubj Property Listing Pres. Cover Page wSubj Property & Agent Photo Listing Pres. Cover Page wSubj Property & Agent Photo Costomizable Text To the Importance of Intelligent Pricing How Buyers Found the Home They Purchased Important Factors in Choosing What Sellers Want Most Select Your Expired/FSBO Page(s) Expired Listing Seller Questionnaire FSBO Seller Questionnaire Key Market Factors Virtual Tour Subject Property Page with Picture			

As you are acquainting yourself with ToolkitCMA[™], you will find it helpful to look at samples of the presentation pages. To do this, hover your mouse over a page title you are interested in viewing. When the wording is underlined, click on it and a sample of the completed page will appear in a smaller window.

ToolkitCMA [™]		≣ GoTo →	O Support -	Angela -
Select the documen	s for your <i>Listing Presentation</i> . Click the document name to toggle a preview. Set as Default Add/Reorder Pages Next			
	Listing Presentation			
	Available Documents			
	Listing Presentation Cover Page Real Estate Services Proposal Prepared Especially for: Tom & Mary White 7 Deep Run Court Hunt Valies, MD 21030 For marketing the property located at: 7 Deep Run Court Prepared by:			

Select or unselect the page based on whether or not you'd like to include it. Repeat these steps for the remaining pages in your document list until you are satisfied with your selection. When you are ready to move forward, click **Next**.

Fill in all the fields on the **'Prospect Information'** screen and press **Next** to advance to the Cover Letter. Make any edits to the Letter that you feel are necessary and then advance by clicking **Next** again.

ToolkitCMA [™]		≣ GoTo ◄	O Support -	Angela -
	required prospect information. This information will be merged with some of Listing Presentation	the documents you	I selected to	
	Prospect Information			
	Presentation Date			
	October 14, 2022			
	Name 🕥			
	Tom & Mary White			
	Mailing Street Address Q			
	7 Deep Run Court			
	Mailing City, State, Zip/Postal Code 🔕			
	Hunt Valley, MD 21030			
	Name in cover letter salutation G			
	Tom & Mary			
	Subject Property Street Address			
	7 Deep Run Court			
	Subject Property Zip/Postal Code			
	21030			
	Use Last Prospect Reset Saved Prospects Next			

Adding MLS Property Data to your Presentation

You will now find yourself on a page titled, **"Select MLS"**. Click to select your MLS from the list of boards provided. **Follow on-screen steps**. If prompted to **Connect to the MLS**, click the link beside that button to open and print the **"MLS Download Guide"**. Then connect to your MLS and follow those steps to upload properties to ToolkitCMA[™].

ToolkitCM/	5	≡ GoTo + 🛛 Support + 🖓 Argela +	ToolkitCMA™	≡ GoTo +	Support -	Angela -
	Select the MLS for your property data. If the words "Enhanced Download" appear beside the MLS name or the search will take place within TookitCMA, by either MLS number entry or criteria search. Otherwise, from the MLS and upload that file to TookitCMA (a Download Guide will be provided on the next screen).		Click the MLS Download Gu listings from the MLS in orde listings file has been saved, listings file you saved during	er to add them <mark>t</mark> o your prese select the Browse or Choos	entation. Onc se file button	ce your to locate the
	Select MLS		Sign in to your MLS.	Get MLS Property Data		
	Demo Properties 🛛 🗸			/ILS Download Guide		
	Bright NLS 🗸		Select the saved listings fil	le. 🥹 🛛 Brov	vse	
	Bright MLS - Enhanced Download 🛛 🕶		Upload the listings for your Upload File	r presentation.		
	Custom Add your Qan Listings 🛛 🖌					
			☑ Only download one phot	to per listing		
	Cancel			Cancel Manual Entry 9		

Select Properties

Once downloaded, you can select any or all properties to be included in your presentation. Use the box on the left side to check the properties to be included or use the box at the top to 'check all'. You can also view property details by clicking on the photo box on the right. When completed, click **Next** to move through the remaining windows.

ToolkitCMA [™]													≡ GoTo ·	Support -	Angela
	Selec	ct Prop	perties												
					Get MLS Property Data	Manual	Entry	Delete Ma	rked Dele	te UnMarked	Next				
		Edit	Status	MLS #	Address	Beds	Baths	Sqft	List Price	Sold Price	Sale Date	L\$/Sqft	S\$/Sqft	More Info.	
		1	S	BC2163415	12 Old Padonia Rd	4	3/1	5384	\$789,000	\$755,000	11/21/04	\$147	\$140		
		1	S	BC2185356	24 Springhill Farm Ct	4	3/1	4000	\$899,900	\$850,000	08/12/04	\$225	\$213		
		1	S	BC2218359	12002 Boxer Hill Rd	6	4/1	5282	\$850,000	\$790,000	09/30/04	\$161	\$150	A Ro	
		1	S	BC2238974	205 Warren Rd	2	2/1	4530	\$899,000	\$885,000	10/17/04	\$198	\$195		
		1	S	BC2246624	12993 Jerome Jay Dr	5	3/1	4872	\$899,000	\$830,000	12/16/04	\$185	\$170	FREE	

Creating your Presentation

After you have advanced through the necessary screens, you are ready to create your presentation. Click **Create Presentation** and your report will be generated as a PDF document. (Some presentations will also have an option to "Include a tablet presentation". A **Choose Slides** button will appear if you check that box.)

Toolkit CMA [™]			≡ GoTo →	Ø Support -	Angela 🗸
	Summary of Selected Properties Currently On The Market Number of Properties: 7 Average Price: \$861,314 Under Contract Number of Properties: 5 Average Price: \$865,985 Recently Sold Number of Properties: 8	Create Presentation Listing Presentation for Tom & Mary White Include a Tablet Presentation Choose Slides Create Presentation			0
	Average Price: \$806,200 Off The Market Number of Properties: 5 Average Price: \$895,140				

When prompted to Save, please save your work so you can retrieve it for up to 180 days. Your presentation can be viewed as a PDF, displayed on a tablet (if included), shared by emailing an embedded link (with or without a Zoom meeting invitation) and/or send via text message.

tCMA™			≡ G	oTo 👻 <table-cell> Su</table-cell>	pport -
C View PDF	C Share	F Text Me	ssage 🛛 🗟 Save	↑ Ho	me
	Summary of Presen	ation			
Prepared on:	Comp	arable Properties			
October 14, 2022	St	MLS#	Address	LP	SP
Type of Presentation:	S	Bc2163415	12 Old Padonia Rd	\$789,000	\$755,000
Listing Presentation	S	Bc2185356	24 Springhill Farm Ct	\$899,900	\$850,000
	S	Bc2218359	12002 Boxer Hill Rd	\$850,000	\$790,000
Prepared by:	S	Bc2238974	205 Warren Rd	\$899,000	\$885,000
Angela McKendrick	S	Bc2246624	12993 Jerome Jay Dr	\$899,000	\$830,000
Standard	s	Bc2286699	19 Chris Eliot Ct	\$849,000	\$725,000
Prepared for:	S	Bc244178C	508 Shawan Rd	\$885,000	\$855,600
Tom & Mary White	S	Bc246266C	4 Chamaral Ct	\$799,000	\$775,000
7 Deep Run Court	A	Bc3109830	510 West Padonia Rd	\$899 500	

ToolkitCMA[™] Training

To assist you in making the most of your ToolkitCMA[™] account, Realty Tools offers a variety of different training options.

- "Walk-thru" Calls With a personalized, one-on-one "Walk-Thru" a ToolkitCMA™ Support agent will walk you through how to navigate the program, at your own pace. You will find an option to Request a personal walk-thru, under the "Support" menu.
- Webinars With one of our monthly live webinars, you can watch a ToolkitCMA[™] Support agent navigate and explain the program from start to finish. For more information, please visit <u>https://www.realtytools.com/cma/webinars</u>.
- 3. Video Tutorials On Demand training videos are also available 24 hours a day in your ToolkitCMA[™] account by going to the "Support" menu and selecting Watch Tutorials.
- 4. **FAQ-** Check out our **Frequently Asked Questions** section, also located in the "Support" menu for detailed information on common questions or problems.
- Personalized Service Realty Tools Customer Service can be reached either by phone (800-828-0970 x3), email (support@realtytools.com) or via online chat, Monday through Friday from 9 AM until 6 PM Eastern time.