



## Cloud CMA Tools Course Notes



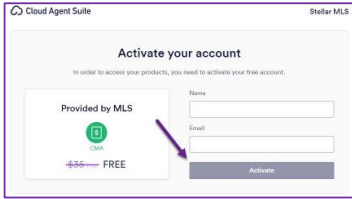
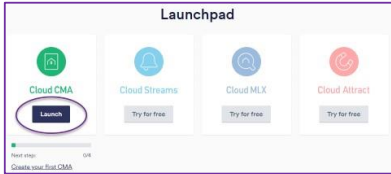
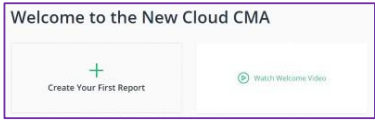
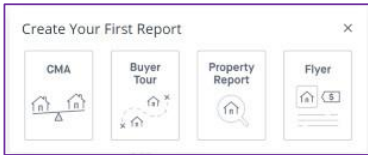
### Cloud CMA

The Cloud CMA product is another option to create beautiful, interactive CMA reports and Buyer Tours, flyers for marketing properties, and other options to help build and promote your real estate business. This course is designed to give you all the tools and information that you need in order to make use of this product. You should be able to create, design, and customize all these reports once we complete this course.

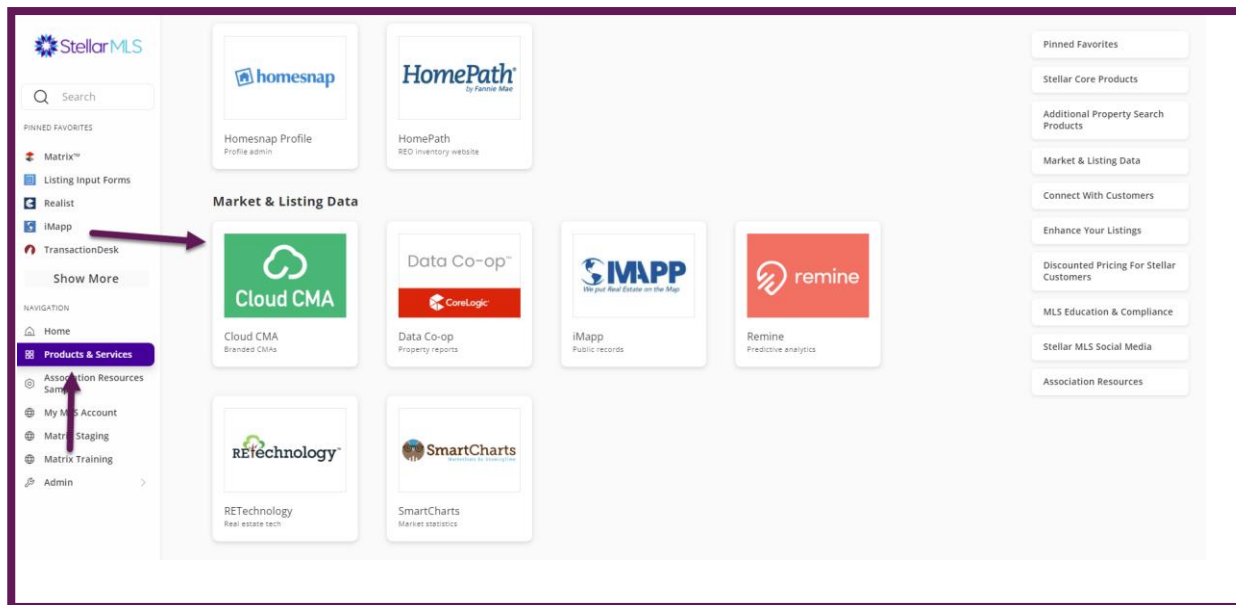
### Launching the Product

Prior to using Cloud CMA, it is necessary to activate the product. Below is a graphic of the steps you will take to activate your account.

### Activating Your Free Cloud CMA Account

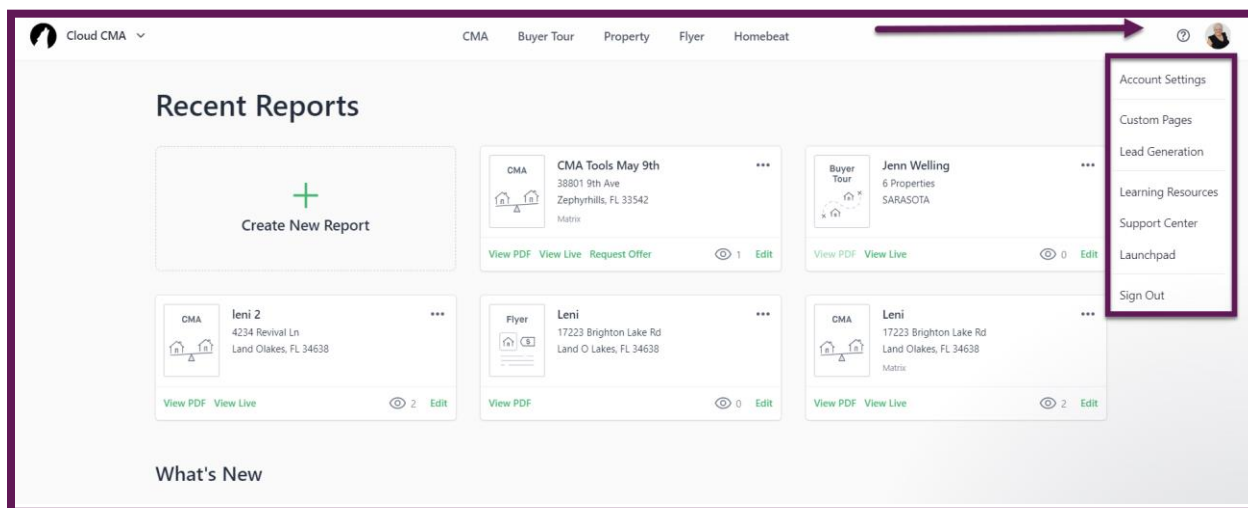
- Step 1** From your **Stellar MLS** dashboard or **External Links Widget**, click on   
Cloud CMA  

- 2** Complete Name and Email and click **“Activate”**  

- 3** From the **Launchpad**, click the **Launch** button to launch Cloud CMA.  

- 4** Click **“Create Your First Report”**  

- 5** Select the type of report you want to create  


Once you have activated your account, you will be able to access the product using the SSO from Stellar Central. You will be able to find the Cloud CMA icon in the Products and Services section of Stellar Central. You can find Cloud CMA under the Marketing and Listing Data heading. You can also pin this product to your Pinned Favorites menu for easier access.



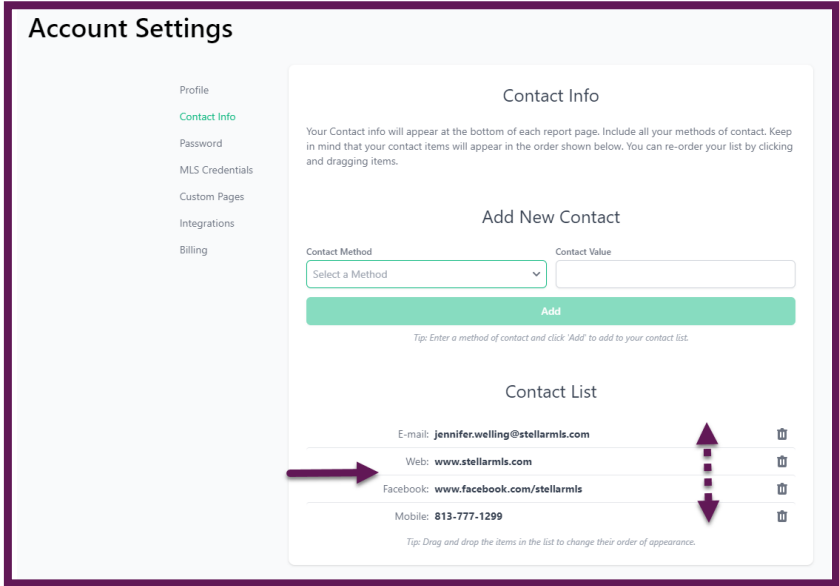
## Branding Cloud CMA

Once you have activated and launched into Cloud CMA, the next step is to brand the product with your personal information. You can access your personal profile in the upper right corner of the main product page.

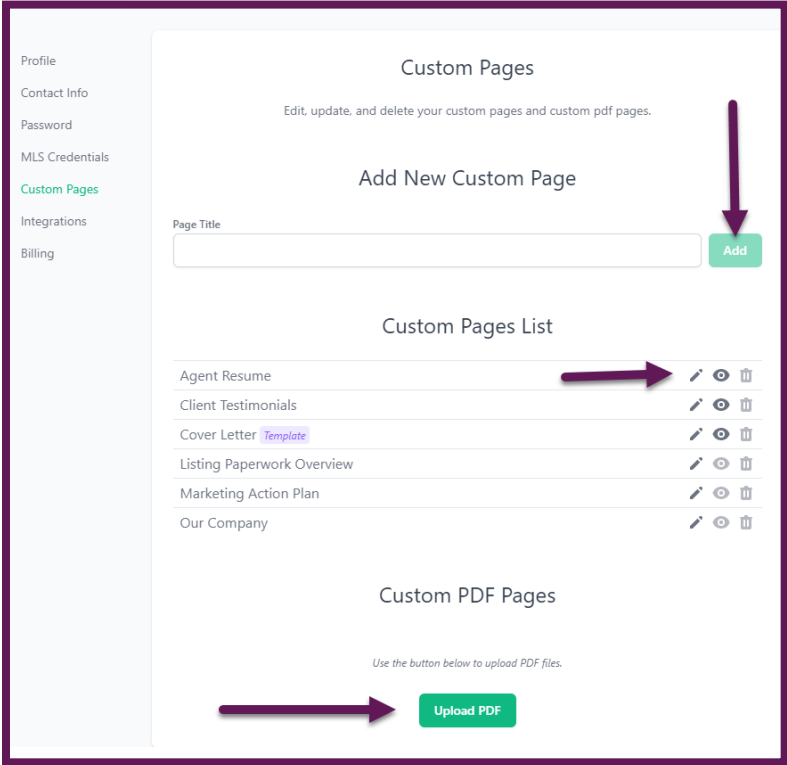


You will want to access your account settings first to verify your information. Under Account Settings, you can upload your agent headshot, verify your name, email address, broker/company name, add your company logo, and the city and state. Once you have verified and customized your profile click on the same button at the bottom of the page.

The next section down is your Contact Info. Here you can add any contact information you want available for your customers on Cloud CMA. To add a contact method, you will select the contact type from the drop-down menu. Once you have a type selected, you can enter the value for that contact method and select the green ADD button. Once you have added all the contact information that you wish to appear, you can rearrange the information by dragging and dropping the lines in the order in which you want them to appear.



The last section to review is Custom Pages. Here you can customize specific pages that are included in the CMA report and other reports that you can utilize through Cloud CMA. Here you can create your own custom pages, edit the custom pages that are included in Cloud CMA, and upload additional PDFs that you may want to include in your reporting.



## Buyer Tours

Cloud CMA offers fantastic Buyer Tours that you can utilize to schedule a day of viewing properties for your customers or present them with a thorough PDF that includes all the information they need when searching for their dream home. There are two options when creating Buyer Tours in Cloud CMA. You have the option of the Classic Buyer Tour, or you can create Live Buyer Tours that can be shared via email or text to bring the information to life. Below are the two options outlined for you.

### Classic Buyer Tour

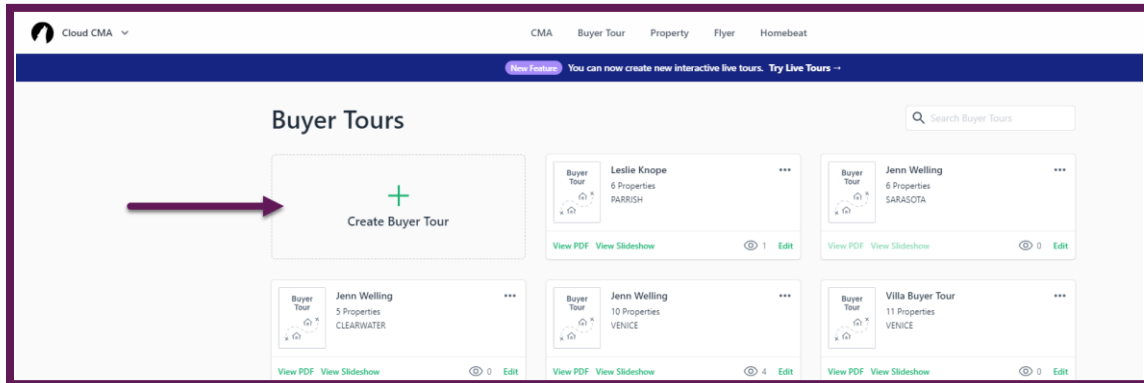
When starting the Buyer Tour journey, the first thing that you must do is decide what listings you are including in your customer's Buyer Tour. You can accomplish this by conducting the appropriate search in Matrix that matches what your customer is looking for. Once you have the results, you can select the individual listings that are going to be reported. You will select the properties by using the square checkbox selector to the left of each individual listing. Once the properties are selected, you will launch into Cloud CMA using the tab in the Actions Menu at the bottom of the page under your results.

#	ML #	Status	Address	City	Zip Code	Subdivision Name	Subdivision/Condo Name	SqFt	H	Current Price	BED	FB	HB	Yr Built	Pool	Property Style
1	T3441080	ACT	11916 MIDDLEBURY DR	TAMPA	33626	WESTCHASE SEC 223		2,579	850,000	4	3	0	1998	Private, Cc	Single Family R	
2	T3411971	ACT	3501 W CHEROKEE AVE	TAMPA	33611	GANDY BOULEVARD PA		2,963	874,990	4	3	0	2022	None	Single Family R	
3	T3429003	ACT	2101 CARROLL LANDING DR	TAMPA	33612	CARROLL LANDING		2,892	890,000	4	3	0	2007	None	Single Family R	
4	T3434567	ACT	3121 W CYPRESS ST	TAMPA	33607	MAC FARLANE PARK		2,499	899,989	4	3	0	2023	None	Single Family R	
5	T3411962	ACT	3501 W 1/2 CHEROKEE AVE	TAMPA	33611	RUBIA		3,004	899,990	4	2	1	2022	None	Single Family R	
6	T3445112	ACT	1814 W BEARSS AVE	TAMPA	33613	UNPLATTED		2,664	900,000	4	3	0	1954	None	Single Family R	
7	T3442429	ACT	3312 W AILEEN ST	TAMPA	33607	JOHN H DREWS FIRST		2,567	900,000	4	3	0	2005	Private	Single Family R	
8	O6105643	ACT	110 S LINCOLN AVE	TAMPA	33609	SOUTHERN PINES		2,368	904,900	4	3	0	1940	Private	Single Family R	
9	T3441186	ACT	3903 NORTHAMPTON WAY	TAMPA	33618	R R BACKS SUB		2,629	929,000	4	2	1	1979	Private	Single Family R	
10	T3433540	ACT	6805 S ENGLEWOOD AVE	TAMPA	33611	CRESCENT PARK/GADS		2,419	894,500	4	2	1	2019	Private	Single Family R	
11	U8200506	ACT	3819 W SAN MIGUEL ST	TAMPA	33629	SOUTHLAND ADD		2,107	894,000	4	3	0	1953	Private	Single Family R	
12	A4563241	ACT	4630 BAY CREST DR	TAMPA	33615	BAY CREST PARK UNIT		1,946	894,000	4	3	0	1968	Private	Single Family R	
13	T3415953	ACT	715 W PLYMOUTH ST	TAMPA	33603	RUBIA		3,004	894,990	4	2	1	2022	None	Single Family R	
14	T3382392	ACT	824 W COLUMBUS DR	TAMPA	33602	450   RIDGEWOOD PAI		2,963	894,990	4	3	0	2022	None	Single Family R	
15	T3442084	ACT	8002 RED ORCHARD CT	TAMPA	33635	WOODLAND PRESERVE		3,025	895,000	4	3	0	2017	Private	Single Family R	

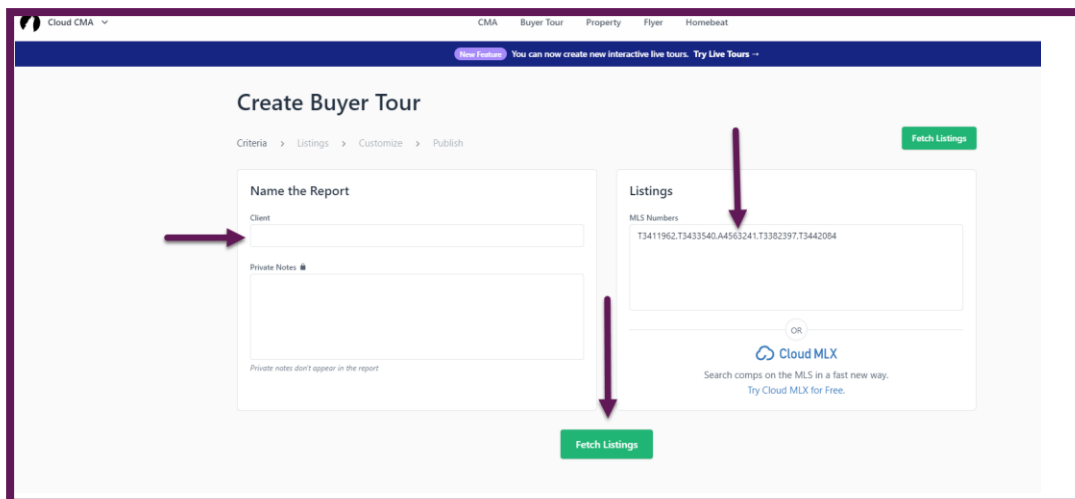
Once you land on the Cloud CMA home page, you will want to select the Buyer Tour tab in the upper center section of the page.

Cloud CMA ▾ CMA Buyer Tour Property Flyer Homebeat

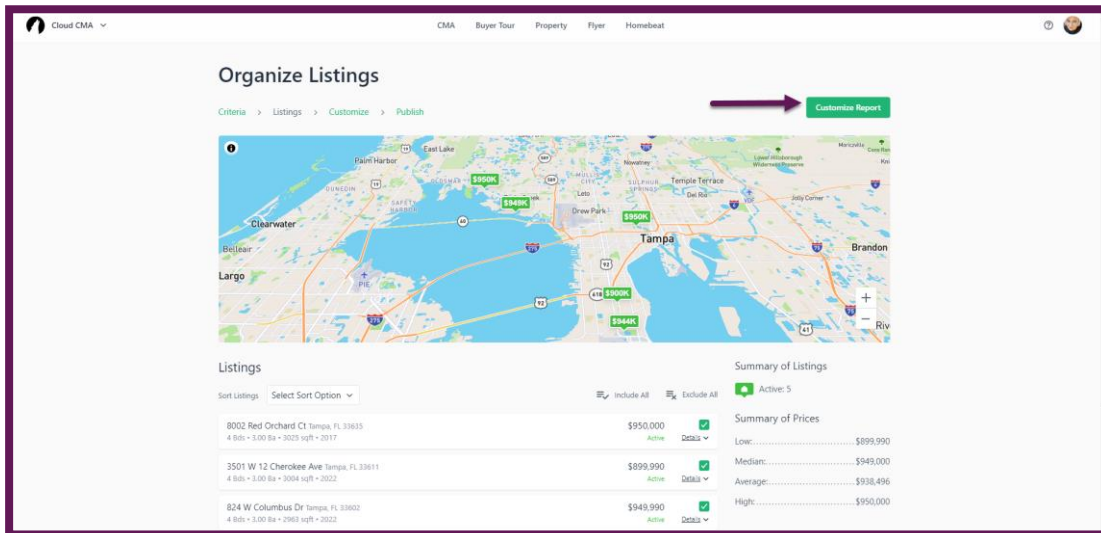
After selecting the Buyer Tour tab, you will have the option to create a Buyer Tour. You will select that option to begin customizing the Buyer Tour.



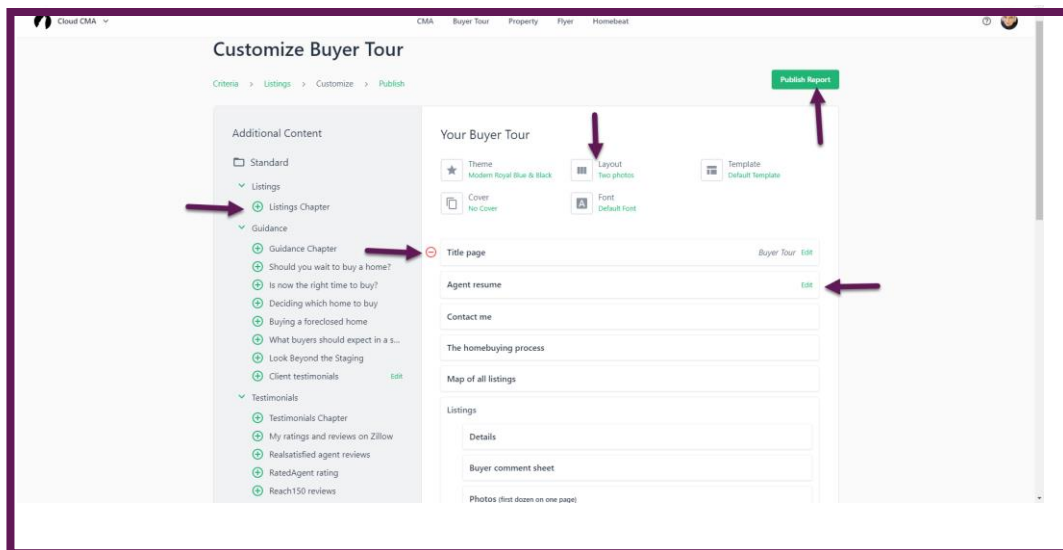
After launching into the report, you will enter the customer's name and any private notes that you want to include. Please note, these private notes will not be visible in the actual report. The MLS numbers for the listings that you selected will automatically be transferred to Cloud CMA from Matrix. To begin the customization process, you will select the Fetch Listings button in the center at the bottom of the page.



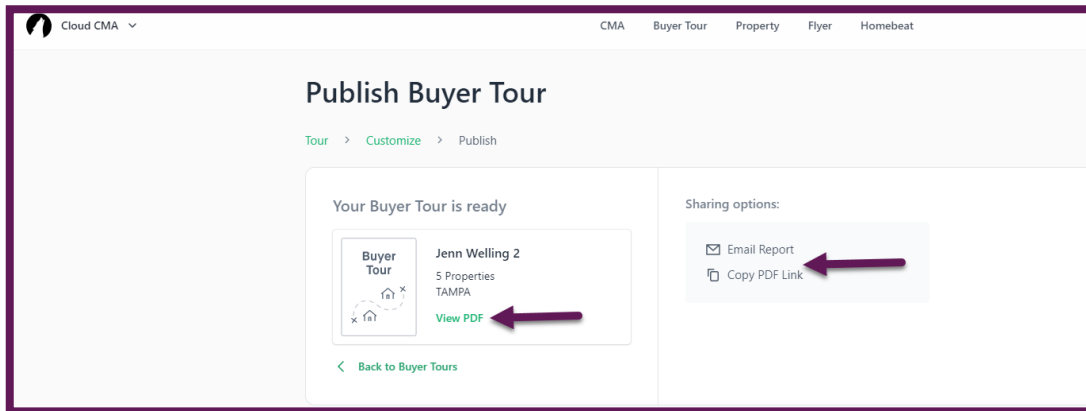
Once the system has pulled all the listing information for your properties into the Buyer Tour, you are able to customize this report. Cloud CMA will place all the listings on a map for you and allow you to organize the listings. You can use the dropdown menu to select criteria that you would like to sort the listings by or can elect to drag and drop the listings in the order in which you want them to appear in the report. Once you have made those changes, you will select the Customize Report button in the upper right corner of the screen.



The next section will allow you to customize your buyer tour. You can add and remove content that you want to include in your report. Under Additional Content, you can simply add any options under the Standard section by clicking on the plus sign to the left of each item. Once it is added, if you change your mind and want to remove that item, simply hover over the item and you will see a red minus appear to the left of the item; click on the red minus, and that item will return to the options list. You also have additional options including various color themes, layouts, templates, and fonts that can be selected from the top center portion of the page. Once all customizations have been selected, you will click on the Publish Report button in the upper right corner of the page.

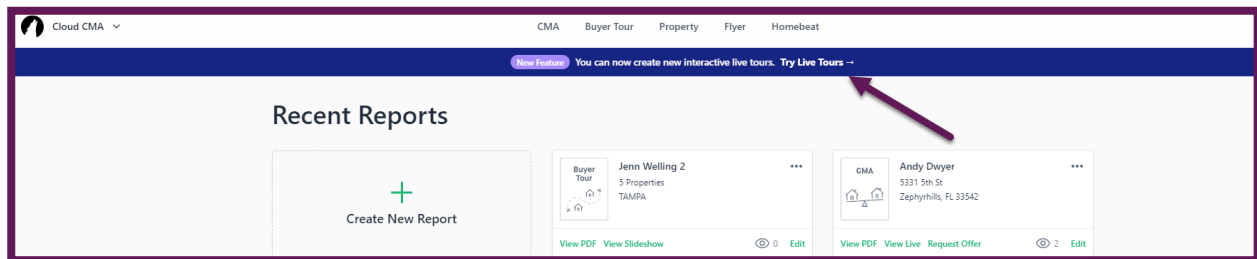


After the report is published, you can access the PDF report for viewing, email the report to your customer, or copy the link for the PDF to be distributed to your customers.



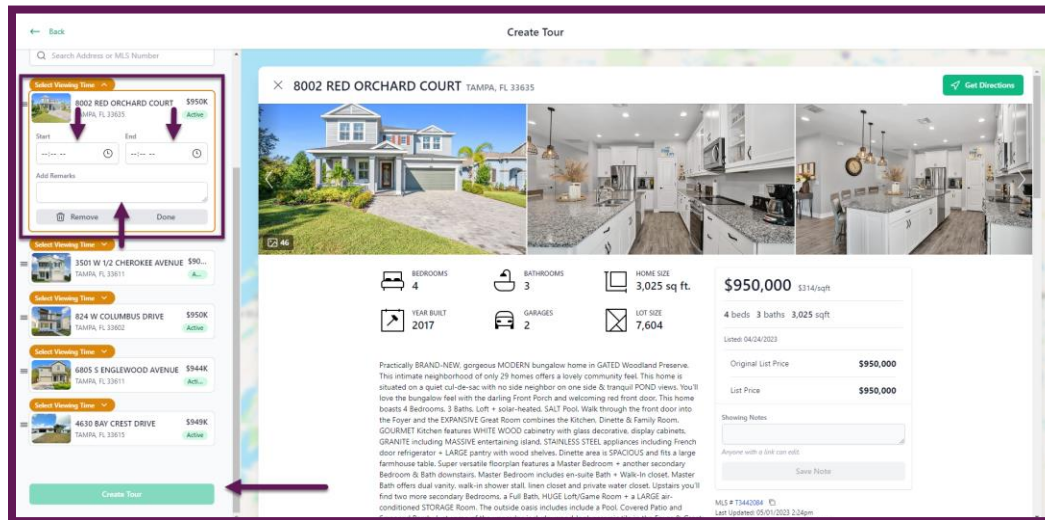
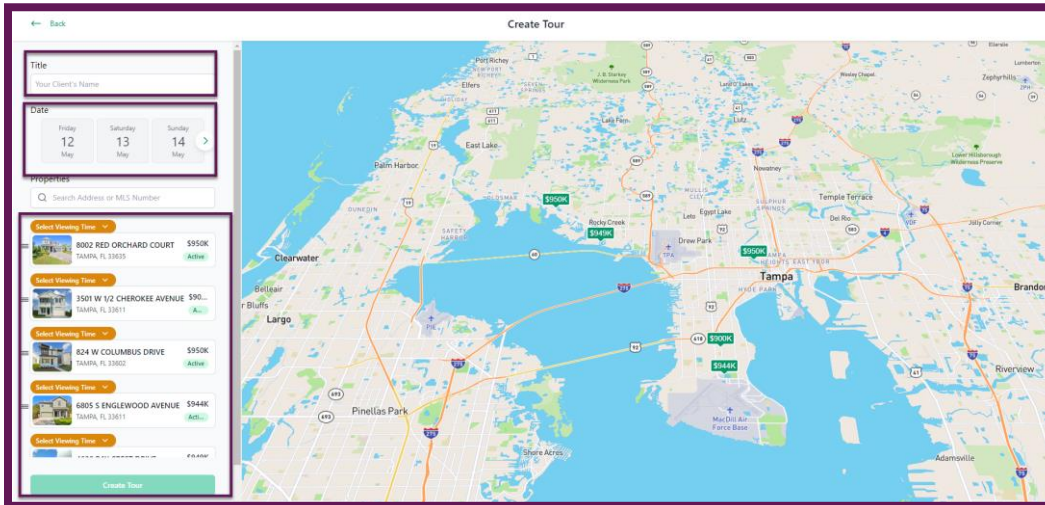
## Live Buyer Tours

Completing the Live Buyer Tour is very similar to completing the classic version with a small twist, you get to schedule your customers' day for them! The beginning steps are the same; log into Matrix and conduct your search, locate your listings, and select the Cloud CMA option from the Actions menu at the bottom of the search results page. In order to access the Live Buyer Tour option, you will simply click on the banner at the top of the home page of Cloud CMA.

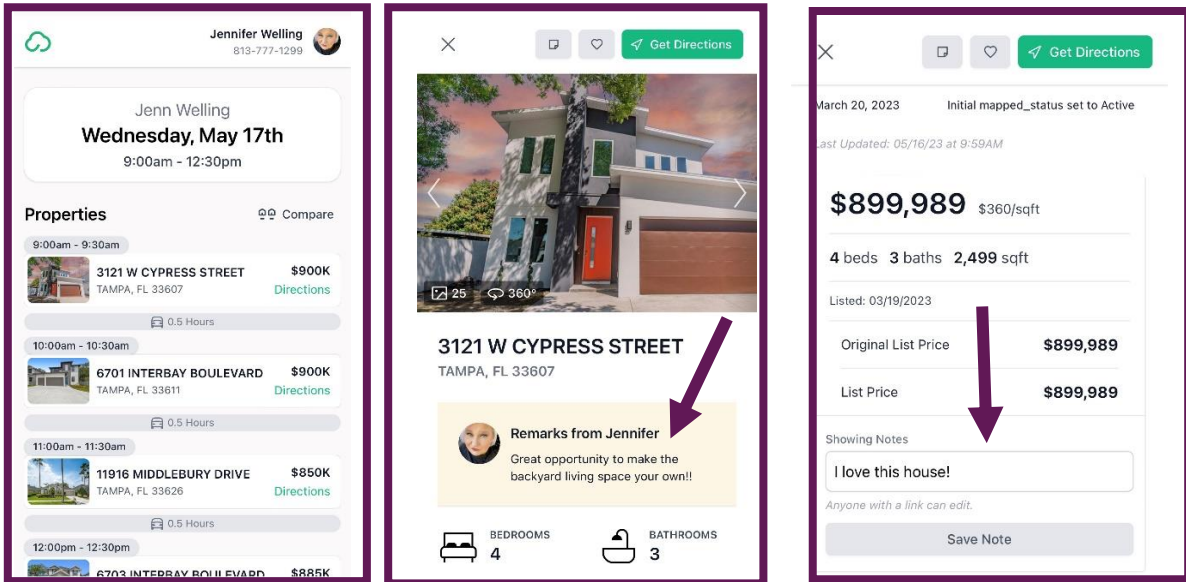


Once you have opted for the Live Buyer Tour, Cloud CMA will automatically import your desired listings into the Live Buyer Tour portal, allowing you to set up your tour. You will first want to enter your customer's name and select a date for the tour. On the right side of the screen, you will see a map with all the listings plotted onto the map for you making it easy to locate the listings and see where they are in conjunction with one another. Below the available dates, you will see all the properties that were imported into Cloud CMA from Matrix. Once you choose Select Viewing Time on a property, the listing information for the property will appear on the right side of the screen. This also gives you access to schedule the viewing start and end time and add any additional notes about the property that you feel the customer should be made aware of. You will continue this process until you have scheduled all the selected properties for the report. Once you have completed these steps, you will select Create Tour and the bottom of this section.

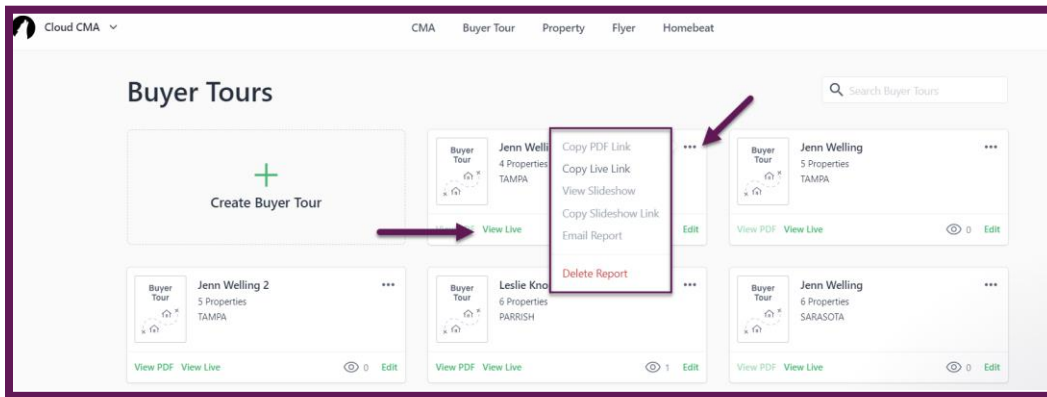




Once the Buyer Tour is published, you can share the active link with your customers via email or text, allowing them to seamlessly interact with the listings, connect to Google Maps, and provide feedback about each of the properties as they tour them. Below are screenshots of the customer's view of the Buyer Tour. The first is the main view of the Buyer Tour with all the listings that are included. The second is the view of the property and remarks by the realtor, and this is the view where the customer can add comments about each property that will be shared with the realtor.



Once the Buyer Tour has been published, you are able to retrieve and share the information in a variety of ways. You will find all your published Buyer Tours under the Buyer Tour tab. When you locate the report you would like to access, use the three-dot horizontal menu in the upper right corner of that card. Here you can opt to copy the PDF, slideshow, and Live links, view the report as a slideshow, email the report, or delete the report. You also have the option to view the report live by selecting the View Live link towards the bottom left corner of the card.



## Property Tab

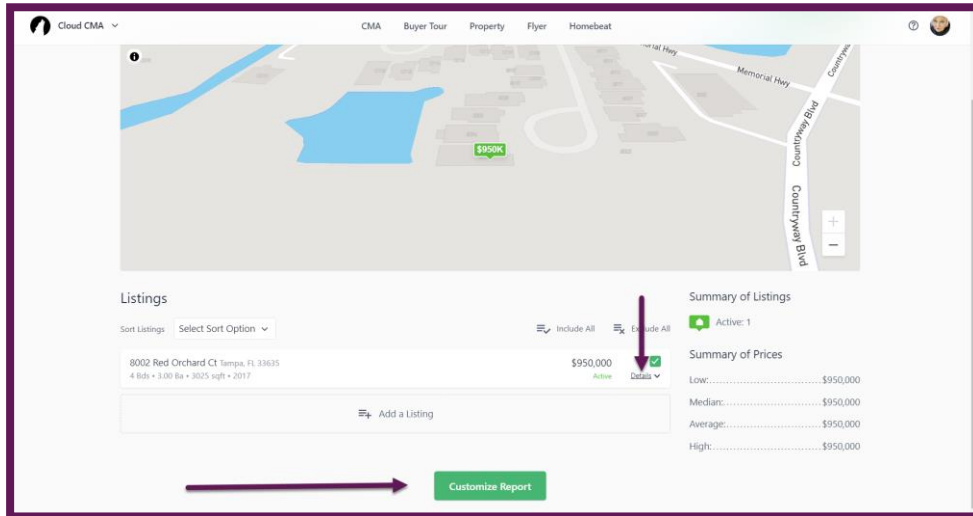
When creating a Property Report, it is necessary to select the property you want to use from Matrix to start the process. You will need to complete a search for the type of property you are looking for. Once you have the property selected, you will select the Cloud CMA button from the Actions Menu at the bottom of the page.

10	T3441186	ACT	3903 NORTHAMPTON WAY	TAMPA	33618	R R BACKS SUB	2,629	\$929,000	4
11	T3433540	ACT	6805 S ENGLEWOOD AVE	TAMPA	33611	CRESCENT PARK/GADS	2,419	\$943,500	4
12	U8200506	ACT	3819 W SAN MIGUEL ST	TAMPA	33629	SOUTHLAND ADD	2,107	\$949,000	4
13	A4563241	ACT	4630 BAY CREST DR	TAMPA	33615	BAY CREST PARK UNIT	1,946	\$949,000	4
14	T3415953	ACT	715 W PLYMOUTH ST	TAMPA	33603	RUBIA	3,004	\$949,990	4
15	T3382397	ACT	824 W COLUMBUS DR	TAMPA	33602	450   RIDGEWOOD PAI	2,963	\$949,990	4
16	T3442084	ACT	8002 RED ORCHARD CT	TAMPA	33635	WOODLAND PRESERVE	3,025	\$950,000	4

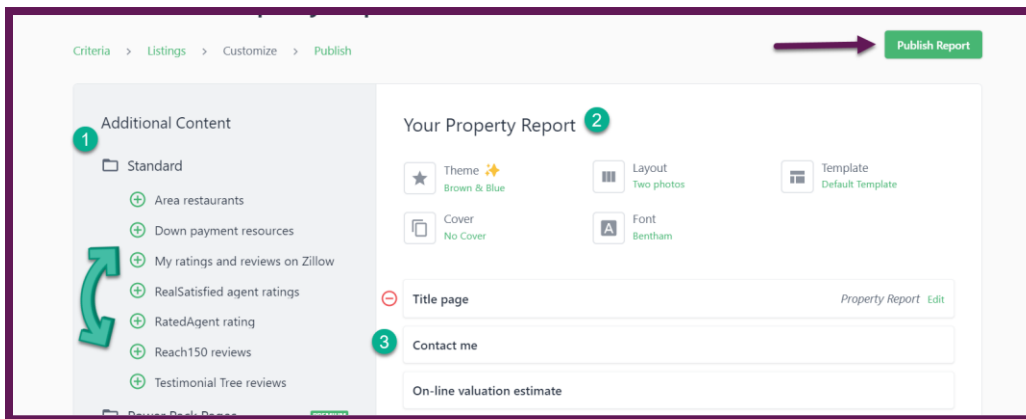
After Cloud CMA is launched, you will select the Property Tab at the top center of the page. This will take you to the Property Report section. From here, you will select to create a Property Report.

From here, you will need to add your customer's name and any additional private notes that you would like to be included as part of the report, and then, you will see the listings from Matrix will already be imported into the report. After this information is entered, you select Fetch Listings at the bottom of the page.

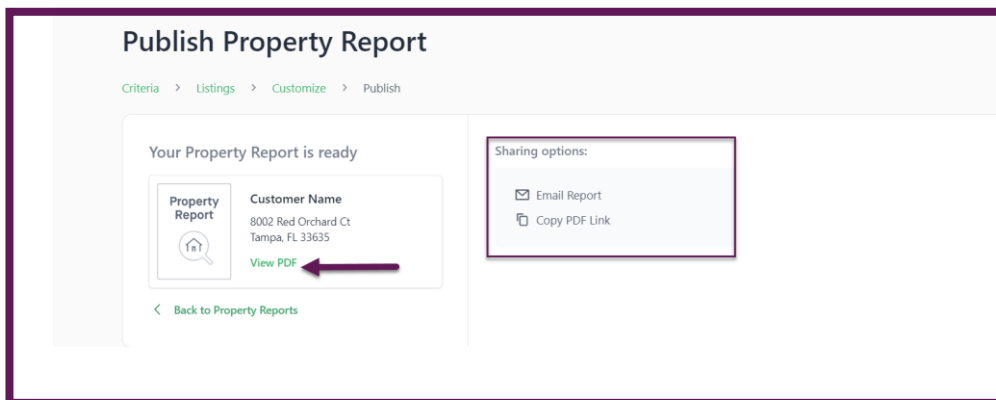
On this screen, you can view the details of the property and add additional listings to the report if desired. To customize the report further, select the green Customize Report button at the bottom of the page.



Here, you can customize the report to display the property data. First, you will select the content pages and information that you want to be included from the Standard menu on the left side of the page. Next, you will select the theme, layout, and font that you would like to be displayed on the report. Then, you can remove any content pages that were added that you would like removed. Finally, select the green Publish Report button in the upper right corner of the screen.

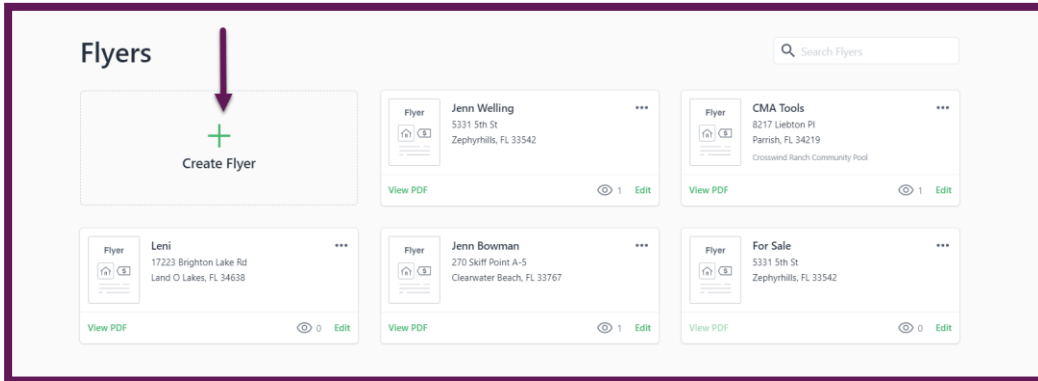


Once the report is published, you can view the PDF, email the report to your customer, or copy the PDF link to be shared with customers or on your social media.

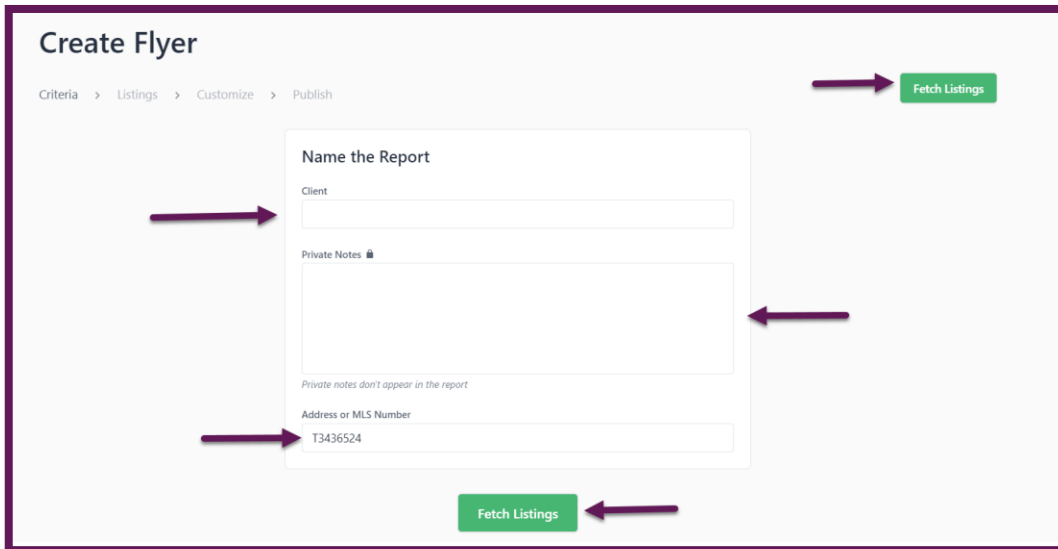


## Flyer Tab

Just like the other options, Buyer Tour and Property Report, it is necessary to select the property that you would like to use in Matrix. Once you have selected the property you wish to report on, you will select the Cloud CMA button on the bottom Actions menu underneath the listing results. After Cloud CMA is launched, you will select the Flyer Tab at the top center of the page. Once you have launched the Flyer tab, you will select Create Flyer.

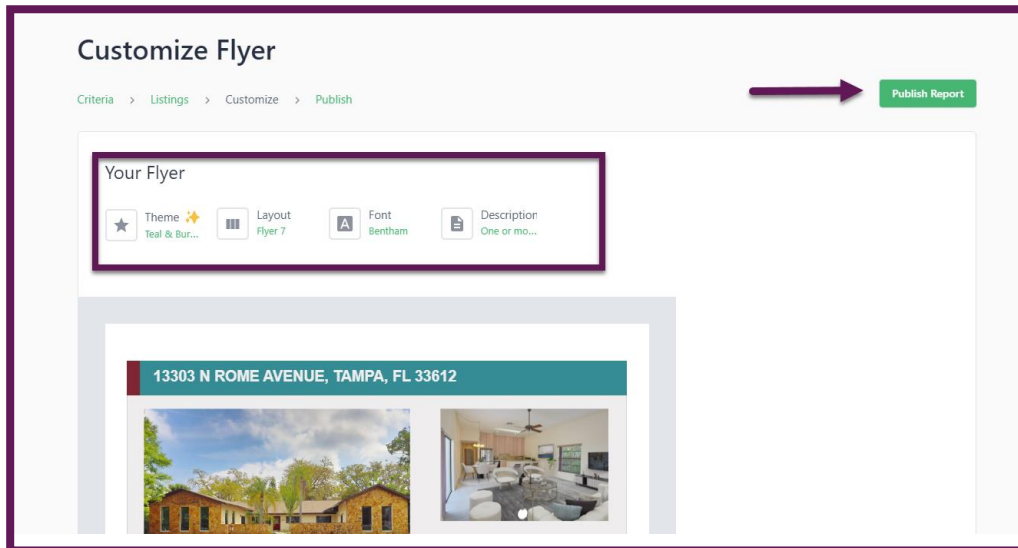


From here, you will add your client's name and any private notes that you would like to add. Again, you will see the imported MLS ID# at the bottom in the Address or MLS Number field. Once you have that information included, you will select the green Fetch Listings button at the bottom of the page or in the upper right corner of the page.

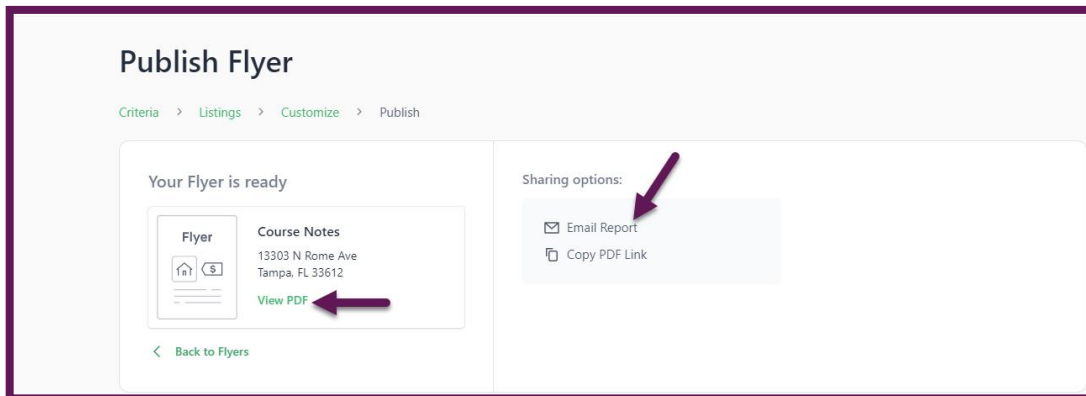


Once the listing has been fetched, you will have access to the listing and information relating to that property. From here you will select the green Customize Flyer button. This will launch you into the section where you are able to customize the flyer.

On the customize page, you can select a color theme, layout for the flyer, font, and add description for your flyer. Once you have these selected, you will select the green publish report button at the bottom of the page or in the upper right corner of the page.



Like the other reports, you can view the PDF, email the report, or copy the PDF link to be shared out with your customer or on your public-facing websites.



## CMA: Comparative Market Analysis

When creating a CMA, there are several steps that must be taken prior to accessing Cloud CMA to create the actual report. You will need to start in Matrix and select the Active, Pending, and Sold listings that you want to include in your CMA. It is necessary to start a residential search for these properties within a specific mile radius of your subject property. You will start a Residential search in Matrix, and then you will add the criteria to the search form. The criteria added during training is as follows:

Map Search: Use the Subject property address

Mile Radius: 1-2 miles depending on # of results

Status: Active, Pending, Sold

Number of bedrooms: Same as Subject Property

Property type: SFR

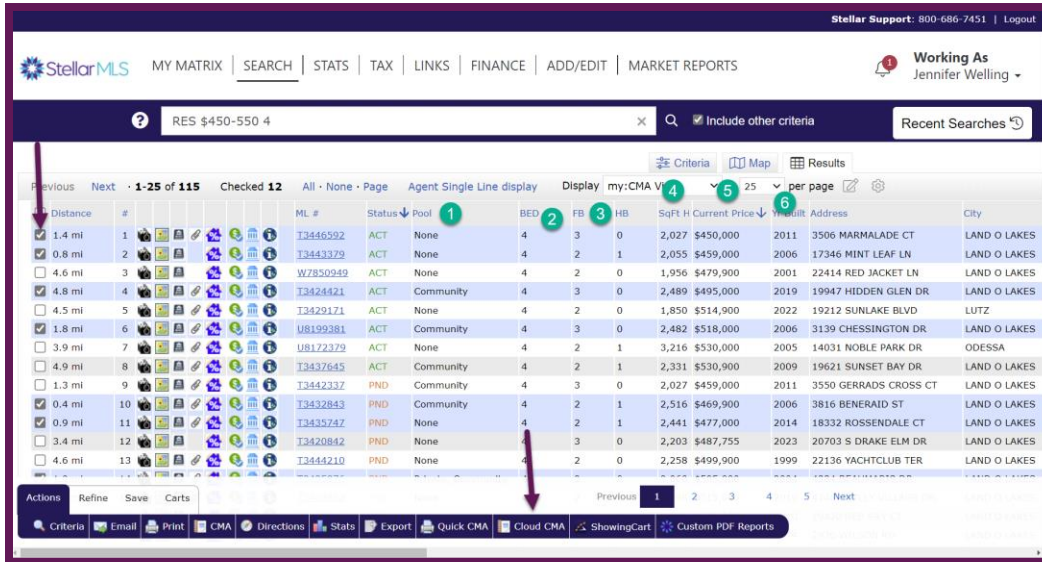
Number of bathrooms: Same as Subject Property

Square Footage: use a range close to subject property

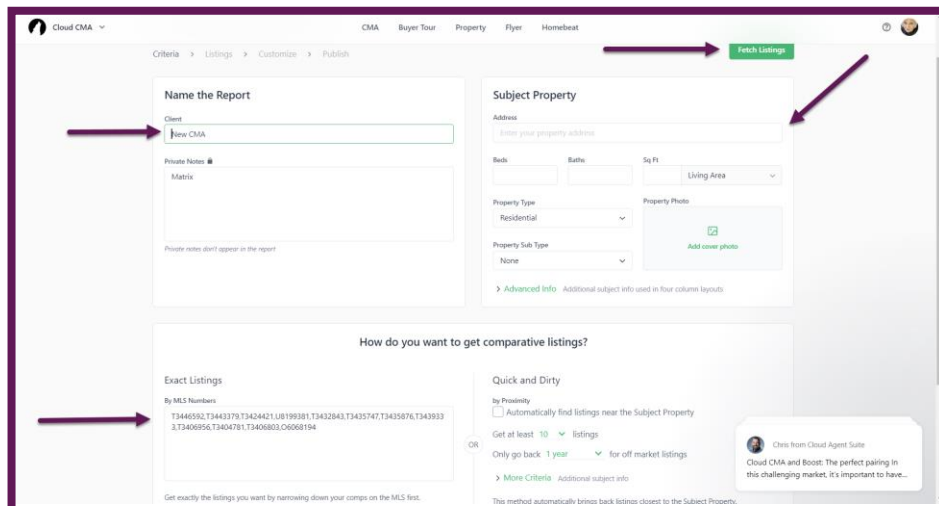
Price: Use a range close to the subject property

Once you have this entered, you will move to the Results tab to select your properties for the CMA.

When selecting comparative properties, you want to make sure that you would select a total of 12 properties. You will want a good balance, so you will want to select 4 Active, 4 Pending, and 4 Sold listings. When selecting your properties, you want to try to select listings that are as close to the subject property as possible (you will see these criteria numbered in the image below). This will make the information you are providing as useful as possible. After selecting the 12 properties you intend to use, you will choose the Cloud CMA button in the Actions Menu underneath the list of results.



Once Cloud CMA is launched, if it does not take you to start the CMA process, you will want to select the CMA tab at the top center of the page. You will need to name the CMA with your customer's name and any private notes you wish to include in the report. Next, you will move to the right of the page and fill in all the information you have available for the subject property. This information will include the subject property address, # of beds and baths, Property type and subtype, and a cover photo (front exterior photo of the property). You are also able to add additional criteria if you like by selecting the green Advanced Info link. At the bottom left of the page, you will find the listing MLS ID #s for the properties that you selected in Matrix. When you are ready to pull the report, you will select the green Fetch Listings button at the upper right corner of the page or at the bottom center of the page.



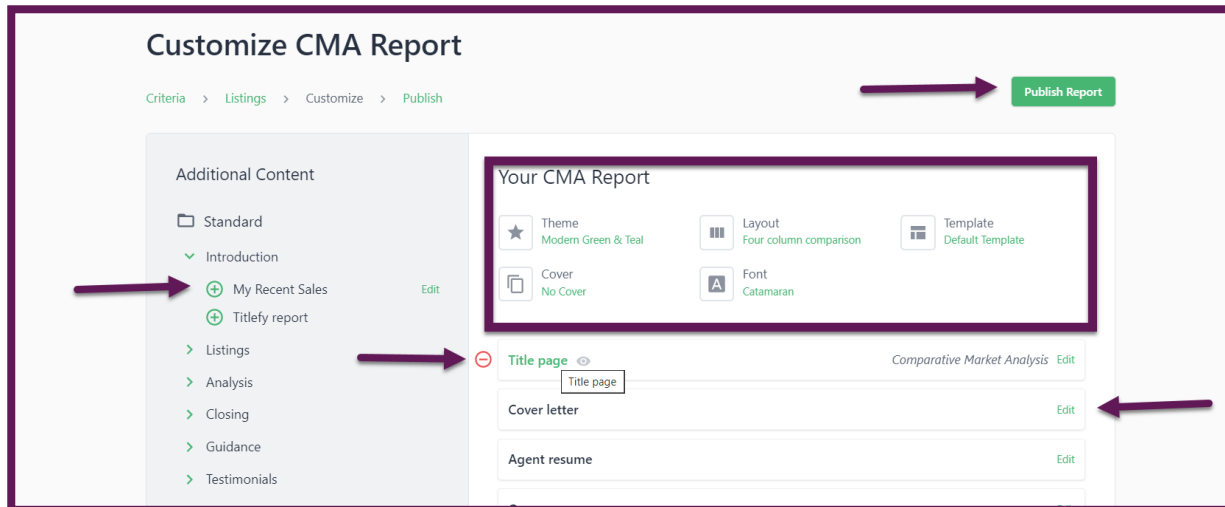
Before customizing your CMA report, you will need to set the price of the subject property. This can be found under the map of the properties. You can also add any adjustments to the comparable properties if you wish to do so. When adjusting, you will add value to a comparative property when the SUBJECT property has something that the comparing property does not. You will subtract value from a comparative property when the comparative property has something that the SUBJECT property does not have. Once you have set your price and completed the appropriate adjustments, you will select the green Customize Report button found in the upper right corner or at the bottom of the page.

The screenshot shows a real estate software interface. At the top is a map with several property markers and price tags (e.g., \$495K, \$505K, \$470K, \$477K, \$450K, \$400K, \$218K, \$496K). Below the map is the 'Subject Property' section, which includes the address '17550 Terrazo Way Land O Lakes, FL 34638' and a price field set to '389000'. To the right is a 'Summary of Listings' section showing 'Active: 4', 'Pending: 4', and 'Sold: 4'. Below that is a 'Summary of Prices' section with values: Low: \$450,000, Median: \$486,000, Average: \$486,358, and High: \$525,000. In the center is a 'Listings' table with three rows of comparable properties, each with a price and a 'Notes & Adjustments' dropdown menu.

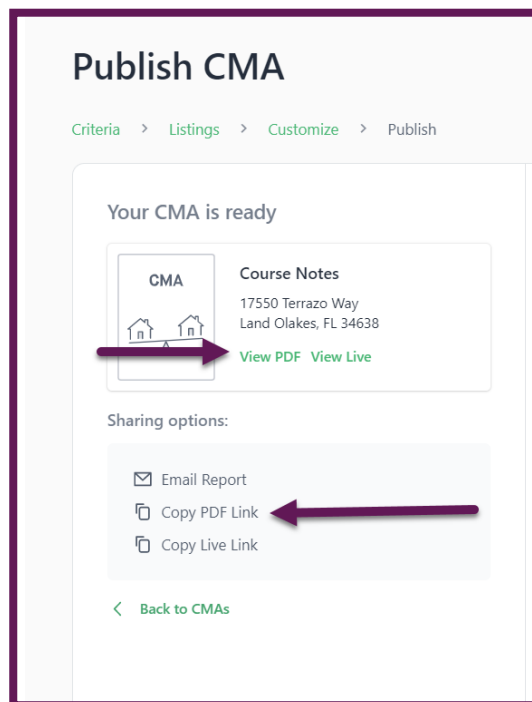
The screenshot shows a real estate software interface with a list of property features on the left and a table for adjustments on the right. The features list includes: Cooling: Central Air; Covered Spaces: 3.0; Direction Faces: North; Disclosures: HOA/PUD/Condo Disclosure, Seller Property Disclosure; Exterior Features: Irrigation System, Rain Gutters, Sidewalk, Sliding Doors; Flooring: Carpet, Ceramic Tile; Owned, Smoke Detector(s); Sewer: Public Sewer; Utilities: BB/HS Internet Available, Cable Connected, Electricity Connected, Natural Gas Connected, Phone Available, Sewer Connected, Street Lights, Underground Utilities, Water Connected; Virtual Tour: View; Water Source: Public. The table has two columns: 'Name' and 'Value'. It contains three rows: 'Adjustment Name' with a value of '\$0', 'Total Adjustments' with a value of '\$0', and 'Adjusted Price' with a value of '\$495,000'. To the right is a 'Summary of Listings' section showing 'Active: 4', 'Pending: 4', and 'Sold: 4'. Below that is a 'Summary of Prices' section with values: Low: \$450,000, Median: \$486,000, Average: \$486,358.

When customizing the report, like all the other reports, you can select the content you wish to include in the CMA from the left-hand side of the Standard list of options. You can add an option by selecting the plus sign on the left side of each option. If you would like to remove an option that may have been selected previously, you will select the minus symbol on the left side of the option you wish to remove. You are also able to select a color theme, layout, template, and font for your CMA. If you have selected a traditional color theme, you will also have the option to toggle between English and Spanish. You can also edit multiple reports to personalize them to your real estate business. Once you have personalized the CMA to your liking, you will select the green publish report button found in the upper right corner or at the bottom of the page.

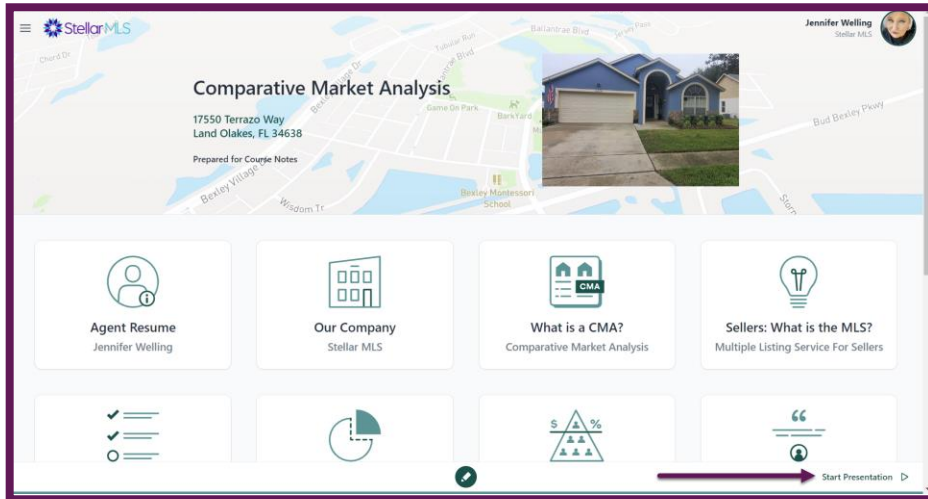




After the CMA is published, you have various sharing options. You can view the PDF version of the CMA, or you can present the CMA live to your customer. You also have the option to email the PDF or copy the PDF and Live links to be shared out.



When viewing the Live CMA, you will have access to a “slideshow” that will allow you to seamlessly present the information. You will navigate from one slide to the next using the arrows in the bottom left and right corners of the report. This can be used during a listing presentation or any meeting when discussing the value of a property. Below is a view of the Live CMA presentation.



## Quick and Dirty CMA

Another option for completing the CMA process is to use Cloud CMA's Quick and Dirty CMA process. This allows Cloud CMA to pull in listings for you rather than using Matrix to select your properties. To start the process, select the CMA tab at the top center of the page and select the Create CMA Report button. From this point, the process starts off the same as when you are creating a CMA from Matrix. You will add your client's name and any private notes. You will then complete the information in the upper right-hand side box labeled Subject Property. You will want to include the subject property address, # of beds and baths, square footage, and Property Type and Subtype. You will also want to include a photo of the property, preferably a photo of the front exterior of the home. From here, rather than having MLS ID #s imported from Matrix, you will complete the Quick and Dirty box that is found in the bottom right corner of the page. You will want to select the checkbox to the left of the phrase "Automatically find listings near the Subject Property" and use the drop-down menus to adjust the number of listings (20) you want to be pulled and the timeframe (6 months) to go back for data, and any additional criteria you would like to include from the More Criteria section. Once this criterion is entered, you will select the green Fetch Listings button found in the upper right corner and bottom of the page.

Cloud CMA will pull multiple properties that are either Active, Pending, or Sold. You will need to sort through the pulled listings to reach 4 of each status type for a total of 12 listings. To deselect a property, you will select the green checkmark in the upper right corner of each listing you wish to remove. Once you have 4 of each property status, you will need to set the price for the subject property. You can research this information by completing a public records search in Matrix and looking at the estimated value section of the report. You also can adjust the property values on this screen. Once the data is prepared and set, you will select the green Customize Report button found in the upper right corner or at the bottom of the page.

**Subject Property**

17550 Terrazo Way Land O Lakes, FL 34638  
4 Bds • 3.00 Ba • 2760 sqft

Set price

Net Sheet & Notes

**Summary of Listings**

Active: 4  
Pending: 4  
Sold: 12

**Summary of Prices**

Low: .....\$469,900  
Median: .....\$570,000  
Average: .....\$589,343  
High: .....\$805,000

**Listings**

Sort Listings Select Sort Option

Address	Price	Status	Action
17833 Wind Chime Land O Lakes, FL 34638 4 Bds • 3.00 Ba • 2731 sqft • 2023	\$670,350	Closed	Notes & Adjustments
18024 Aero Ave Land O Lakes, FL 34638 4 Bds • 3.00 Ba • 2775 sqft • 2021	\$550,000	Closed	Notes & Adjustments
4256 Cadence Loop Land O Lakes, FL 34638 4 Bds • 3.00 Ba • 2334 sqft • 2020	\$560,000	Closed	Notes & Adjustments
5011 Ballantrae Blvd Land O Lakes, FL 34638 4 Bds • 3.00 Ba • 2061 sqft • 2019	\$535,000	Closed	Notes & Adjustments

Once here, you will follow the same steps to customize your CMA that are outlined in the above-referenced section for “CMA”.

## Lead Generation

Cloud CMA not only offers a variety of different reports for you to use to promote your real estate business, but they also provide you with the ability to generate your own leads by using their Cloud CMA landing page. Customers can use your landing page to generate their own CMA for their property. When doing this, they are required to include their contact information which, in turn, is shared with you, the agent. This option is very easy to use and is already set up and available to you to start using today.

To access the Landing Page URL, simply click in the upper right corner of the webpage where you either see your initials or your headshot (this will depend on whether you have branded Cloud CMA with your headshot). From the drop-down menu, you will select Lead Generation.

Cloud CMA

CMA Buyer Tour Property Flyer Homebeat

**Recent Reports**

Create New Report

course notes  
17550 Terrazo Way  
Land O Lakes, FL 34638

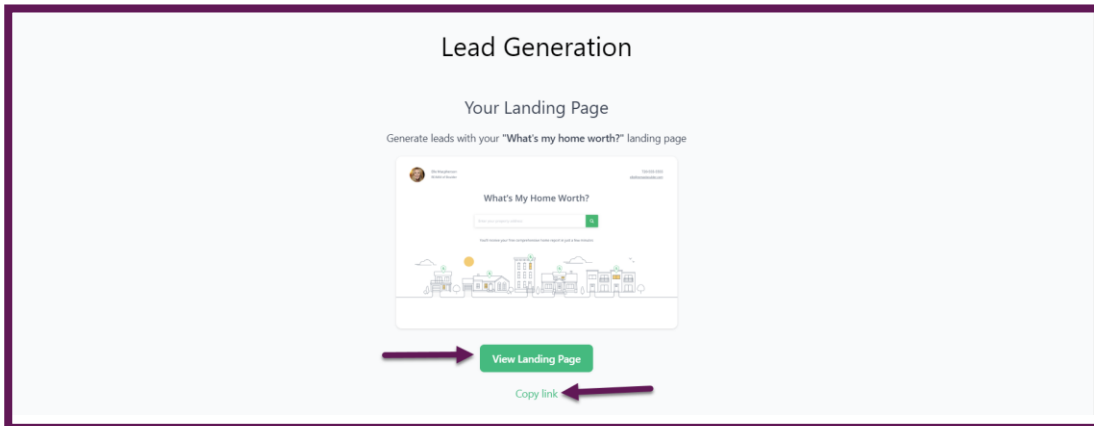
course notes  
17550 Terrazo Way  
Land O Lakes, FL 34638

Course Notes  
17550 Terrazo Way  
Land O Lakes, FL 34638

Course Notes  
13303 N Rome Ave  
Tampa, FL 33612

Account Settings  
Custom Pages  
Lead Generation  
Learning Resources  
Support Center  
Launchpad  
Sign Out

After launching this section, you will see where you can view the landing page and copy the link for your personal page. You can use this link to hyperlink Cloud CMA with your Agent webpage or social media outlets. This is a great way to get leads on prospective buyers/sellers.

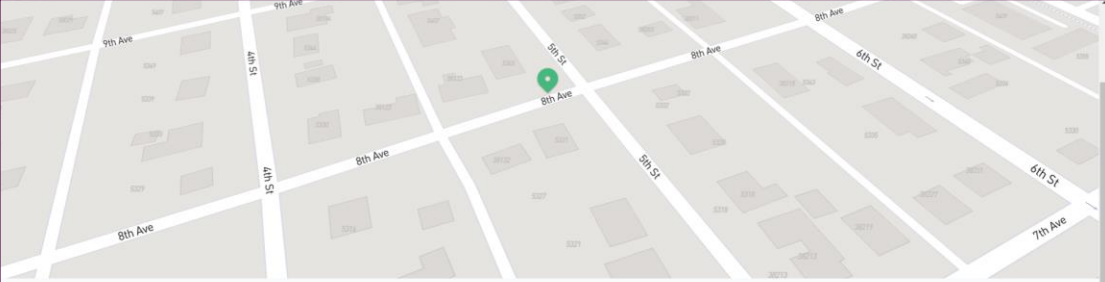


### Customer View of Cloud CMA landing page

Below are the steps the customer will take when accessing your Cloud CMA landing page. When they first click on the link, they will be taken to your landing page. On the landing page, there is an area in the center of the page where the customer will enter the property address that they want to look up and then select the green magnifying glass icon.



Cloud CMA will then take the customer to a new screen where the listing is shown on a map, and then the customer will be prompted to enter their contact information in order to get their free CMA of the property. This information is then sent to you in the form of a lead.



**We Found It**

5331 5TH STREET, ZEPHYRHILLS, FL 33542

Please let us know where to send your home valuation:

Full name *	Email address *
<input type="text" value="John Doe"/>	<input type="text" value="john.doe@example.com"/>
Phone	Sq/ft of your home
<input type="text" value="555-555-5555"/>	<input type="text" value="1200"/>

**Lead Generation Form** ←