

EasyCMA: Create a New CMA Report Step-by-Step Instructions

This guide will walk you through each step of creating a new CMA Report in EasyCMA.

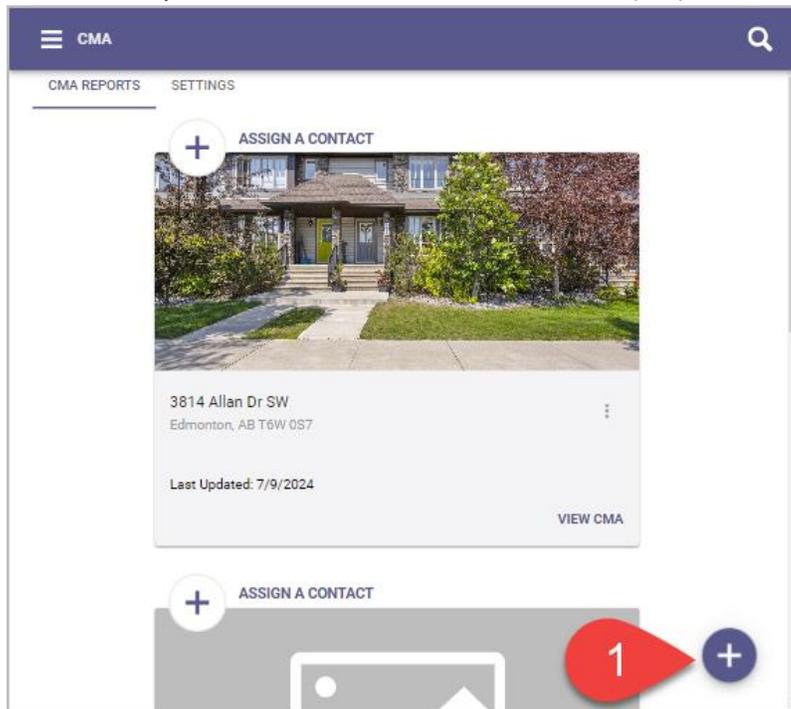
- Starting a New CMA Report
- Selecting and Editing Comparables
- Generating and Viewing the CMA Report

Starting a New CMA Report

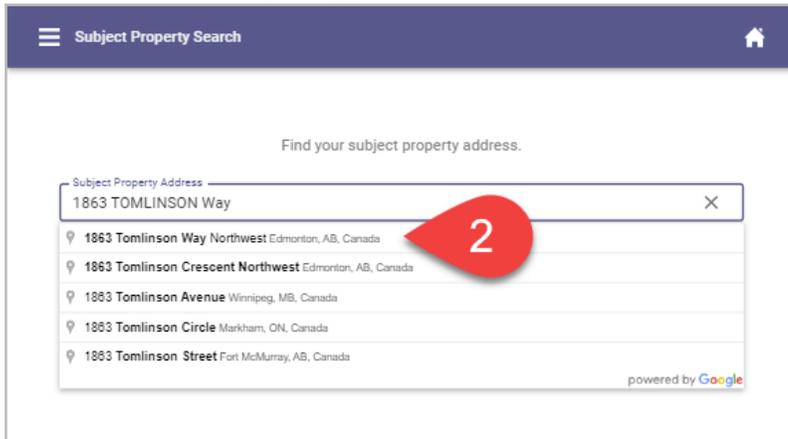
To start a new CMA report, you will need to enter the subject property address and details and select and edit the comparables. EasyCMA will automatically generate comparables based on the subject property criteria and the data dictionary. You can also manually enter comparables or import them from Paragon Connect or Paragon Pro.

To start a new CMA report, follow these steps:

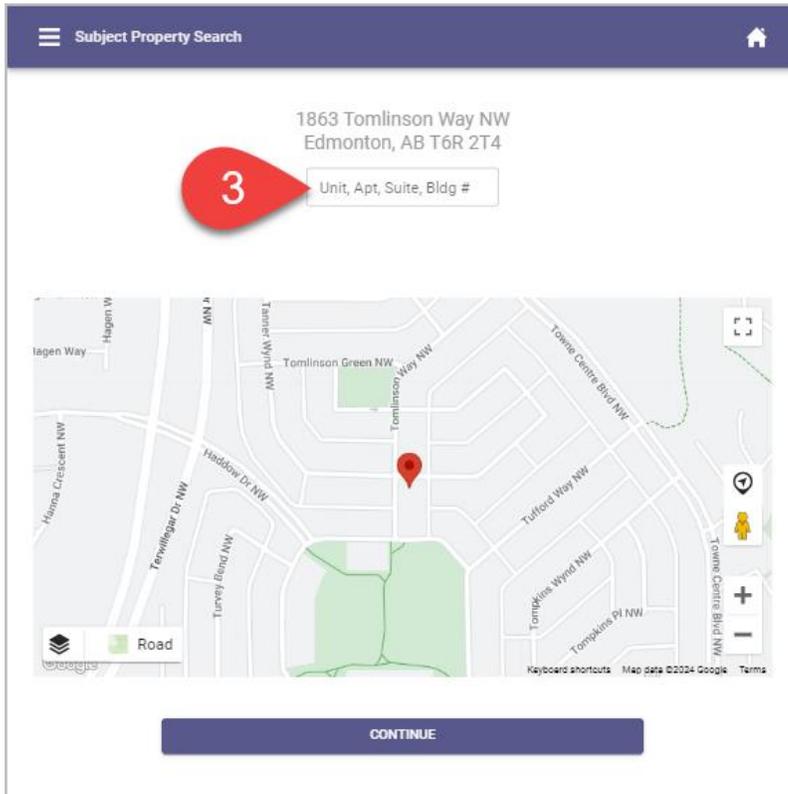
1. From the EasyCMA Dashboard, click the **Add** button (+) to start a CMA.



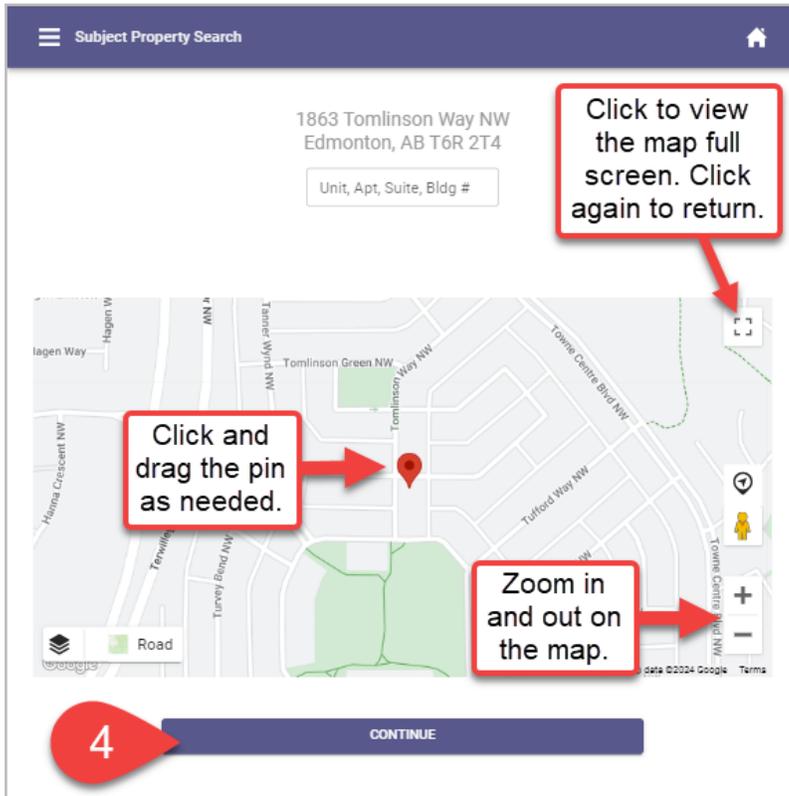
2. The **Subject Property Search** page will open. Enter the subject property address and select the address from the Google suggested addresses.



3. The address will display at the top and a map below with a pin marker on the property. Add a Suite # if the subject property has one.



4. You can zoom in or out on the map and can move the pin as needed to center it on the subject property. Once you are done, click the **Continue** button.



5. The **Subject Property Details** page will open with a Google Street View of the property and detail fields for the property.

- When a valid recent listing is found for the property, it will prepopulate the fields.
- If one is not found, if some of the fields are blank, or no longer accurate, populate or modify the field values as needed.
- Any field for which you do not know the value, enter a 0. The only fields that require a non-zero value are **Property Type** and **Year Built**.
- Note that the property type values have been grouped, for example, things like Single Family and Country Residential will all be grouped under Residential.

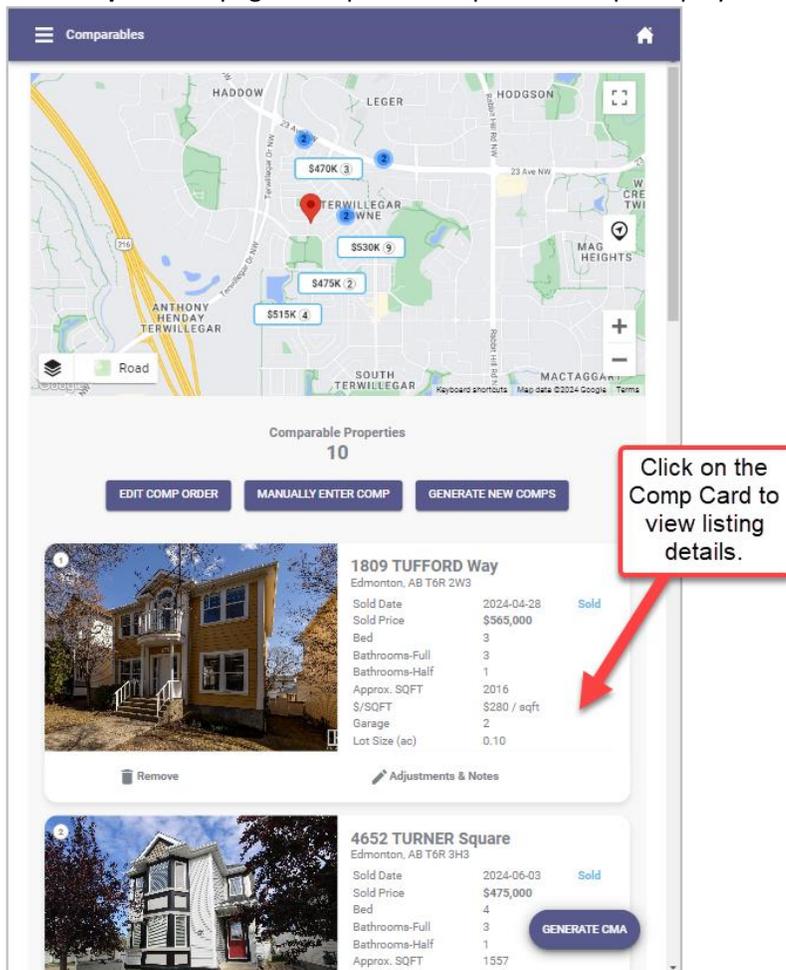
☰ Subject Property Details

Review and fill in the property details.

1863 Tomlinson Way NW
Edmonton AB T6R 2T4

Property Type	Single Family Residence
Total Bedrooms *	4
Total Full Bathrooms *	3
Total Half Bathrooms *	1
Garage Capacity *	2
Total Living Area *	1883.7
Total Lot Size (Acres) *	0.12
Year Built *	1999

- When you are done, click the **Next** () button to generate comparables.
- The **Comparables** page will open with up to 10 comps displayed.



The screenshot displays the 'Comparables' interface. At the top, there's a map showing the subject property (red pin) and several comparable properties (blue pins) with their respective prices: \$470K (3), \$530K (9), \$475K (2), and \$515K (4). Below the map, it says 'Comparable Properties 10'. There are three buttons: 'EDIT COMP ORDER', 'MANUALLY ENTER COMP', and 'GENERATE NEW COMPS'. The first property card is for 1809 TUFFORD Way, Edmonton, AB T6R 2W3. It is marked as 'Sold' and includes details: Sold Date: 2024-04-28, Sold Price: \$565,000, 3 Beds, 3 Bathrooms-Full, 1 Bathroom-Half, Approx. SQFT: 2016, \$/SQFT: \$280 / sqft, Garage: 2, Lot Size (ac): 0.10. A red arrow points from a callout box to the 'Sold' status. The second property card is for 4652 TURNER Square, Edmonton, AB T6R 3H3, with details: Sold Date: 2024-06-03, Sold Price: \$475,000, 4 Beds, 3 Bathrooms-Full, 1 Bathroom-Half, Approx. SQFT: 1557. A 'GENERATE CMA' button is visible next to it.

You have now entered the subject property and generated the comparables. Next, we will show you how to select and edit the comparables.

Selecting and Editing Comparables

EasyCMA allows you to select and edit the comparables that you want to use for your CMA report. You can edit the order of the comparables, manually enter comparables, generate new comparables, add adjustments and notes to a comparable, and remove a comparable. You can also view the comparable details and documents in ConnectView.

To select and edit comparables, follow these steps:

Viewing the comparable details and documents

1. Click on any comp card to see the details of the comparable.

1809 TUFFORD Way
Edmonton, AB T6R 2W3

Sold Date 2024-04-28 Sold
 Sold Price **\$565,000**
 Bed 3
 Bathrooms-Full 3
 Bathrooms-Half 1
 Approx. SQFT 2016
 \$/SQFT \$280 / sqft
 Garage 2
 Lot Size (ac) 0.10

[Remove](#) [Adjustments & Notes](#)

2. Scroll down to review the Property Details, Documents (if there are any).

PHOTOS MAP VIEW STREET VIEW

1809 TUFFORD Way **CA\$565,000**
 Edmonton, AB T6R 2W3
 RESIDENTIAL
 SOLD

ML Number E4384221	Bedrooms 3	Bathrooms 3.1
Days on Market 2 days	TFA SF 2,016.85	

Public Remarks
 Do NOT miss this SHOWHOME LIKE FULLY FINISHED BASEMENT home offering over 2800 total square feet of living space! Spacious kitchen with an island and corner pantry! You'll love the beautiful living room with tons of natural light and a gas fireplace. The home also has a great finished basement with a home office, laundry room, and wood

Property Details

Standard			
Community	Terwilligar Towne	Zone	Zone 14
Building Type	Detached Single Family	Style	2 Storey
Year Built	2000	Tot Flr Area A.G.(m2)	187.37
# Finished Levels	2	Basement	Full
Basement Development	Fully Finished	PARKING	Double Garage Detach
Enclosed Parking	2	Total Parking	4
Tax Amount	\$4,685.94	Tax Year	2023

Private Remarks
 Private Remarks

2. The card will be removed as a comp and will appear in the **Removed Comps** section at the bottom of the page. Click **Select** to add the comp back.

Comparables



2349 LEMIEUX PLACE Place
Edmonton, AB T6R 0C3

Sold Date 2024-05-09 **Sold**
Sold Price **\$429,000**
Bed 4
Bathrooms-Full 2
Bathrooms-Half 1
Approx. SQFT 1461
\$/SQFT \$293 / sqft
Garage 2
Lot Size (ac) 0.10

Remove Adjustments & Notes

Removed Comps



1904 TOMLINSON Way
Edmonton, AB T6R 2R5

Sold Date 2024-03-08 **Sold**
Sold Price **\$470,000**
Bed 4
Bathrooms-Full 2
Bathrooms-Half 2
Approx. SQFT 1582
\$/SQFT \$297 / sqft
Garage 2
Lot Size (ac) 0.10

Select **2**



2450 TEGLER Green
Edmonton, AB T6K 3K3

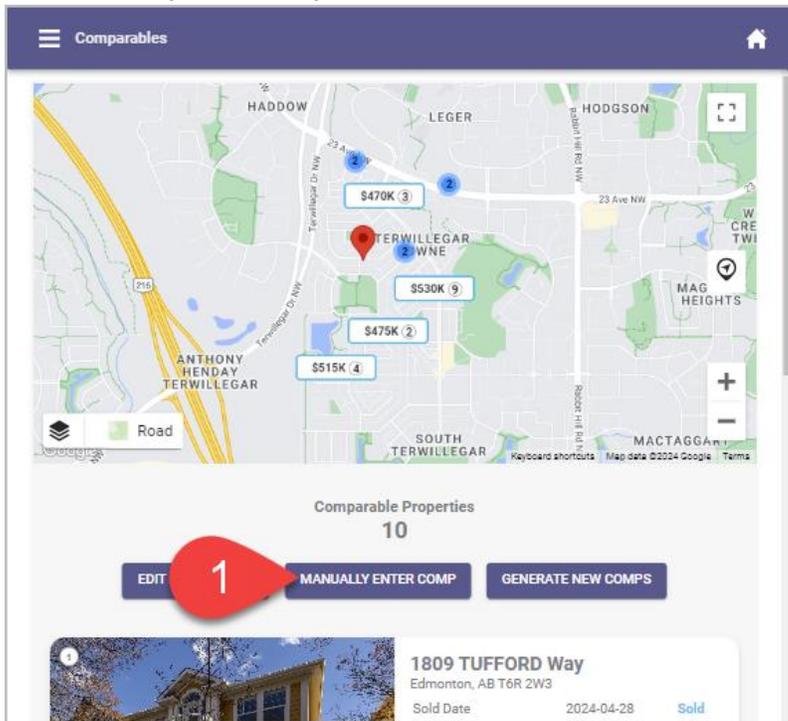
Sold Date 2024-06-20 **Sold**
Sold Price **\$912,500**
Bed 5
Bathrooms-Full 3
Bathrooms-Half 1
Approx. SQFT 1979
\$/SQFT \$461 / sqft
Garage 2
Lot Size (ac) 0.15

Select

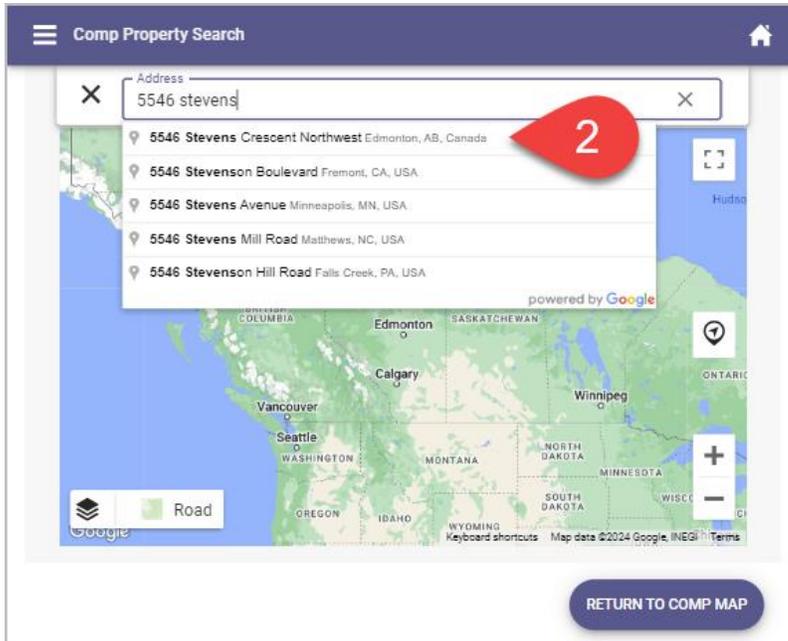
GENERATE CMA

Manually entering comparables

1. Click **Manually Enter Comp.**



2. On the **Comp Property Search** page enter the address for the property that you would like to manually add to the CMA, then select it from the Google suggested addresses.



- The map will display the location of the property with a pin marker and a comp card will display below the map for the comp. Click **Select Comp** on the card to add it to the CMA.

Comp Property Search

Address: 5546 Stevens Crescent NW, Edmonton, AB T6R 0A3, Canada

5546 STEVENS Crescent
Edmonton, AB T6R 0A3

Sold Date	2024-07-02	Sold
Sold Price	\$475,100	
Bed	3	+\$5
Bathrooms-Full	2	+\$2
Bathrooms-Half	1	
Approx. SQFT	1542	
\$/SQFT	\$308 / sqft	
Garage	2	
Lot Size (ac)	0.08	

+ Select Comp

RETURN TO COMP MAP

- You will be taken back to the Comparables page. Scroll down the page to see the added comps at the bottom of the list.

5. If you try to add a comp manually that already exists as a comp, a message will display indicating this, **“Property already included in generated comps”**.

Comp Property Search

Address: 1849 Tufford Way NW, Edmonton, AB T6R 2W4, Canada

1849 TUFFORD Way
Edmonton, AB T6R 2W4

Sold Date	2024-05-15	Sold
Sold Price	\$525,000	
Bed	4	
Bathrooms-Full	3	
Bathrooms-Half	1	
Approx. SQFT	1858	
\$/SQFT	\$282 / sqft	
Garage	N/A	
Lot Size (ac)	0.10	

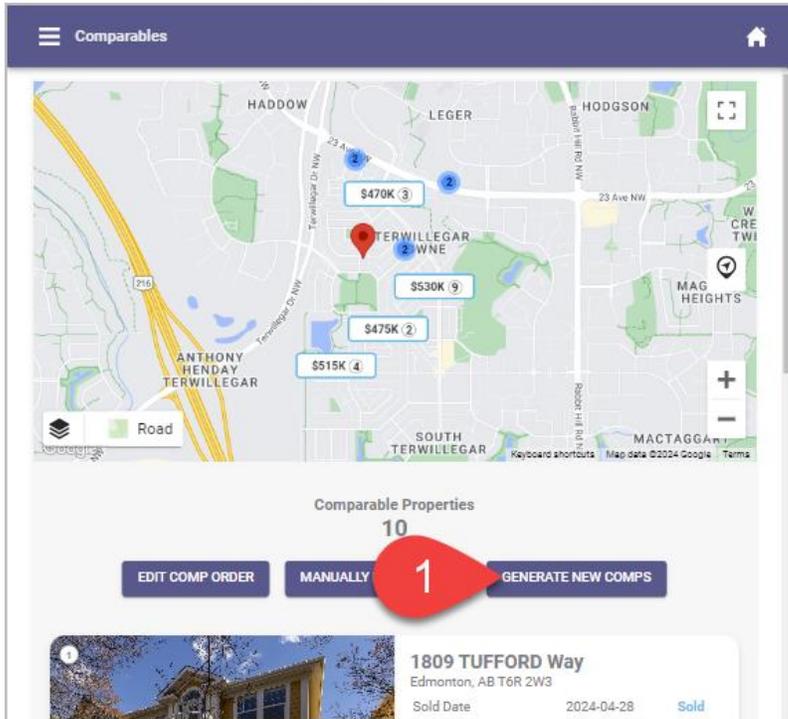
+ Select Comp

Property already included in generated comps

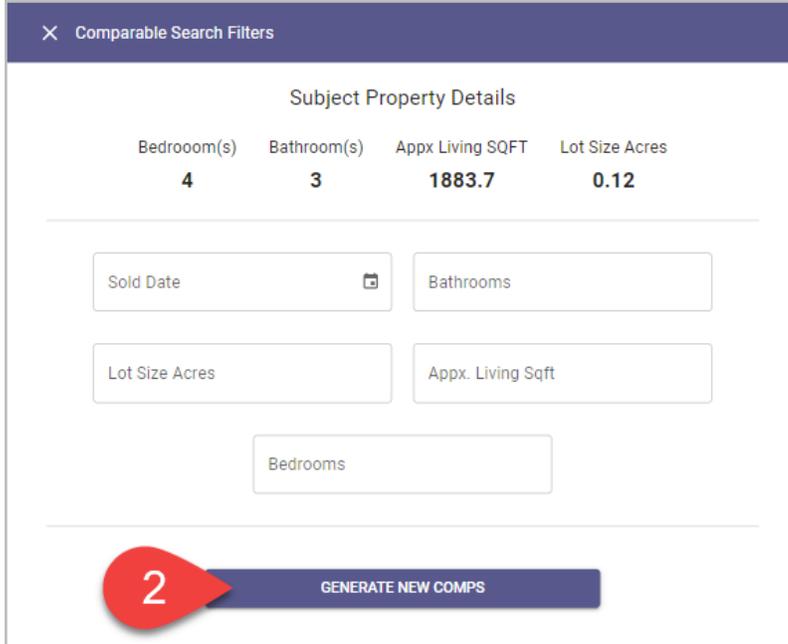
RETURN TO COMP MAP

Generating new comparables

1. Click **Generate New Comps** to generate new comps.



2. The **Comparable Search Filters** page will open. Enter the criteria for the comps that you want to find and when you are done, click **Generate New Comps**.

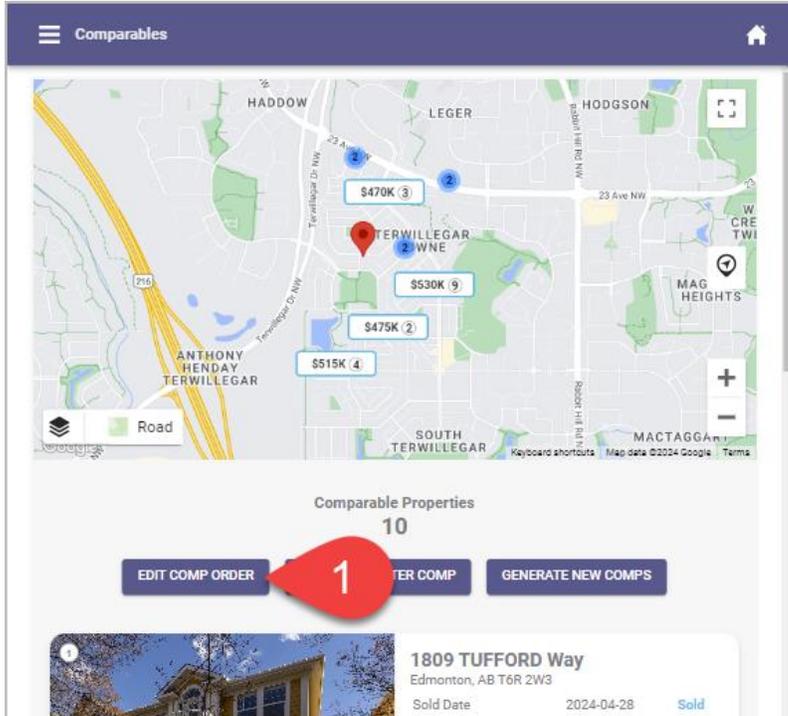


3. This will take you back to the Comparables page. If any of the comps have changed, you will see the newly added comps at the top, and the previous comps below that in the Removed Comps section.

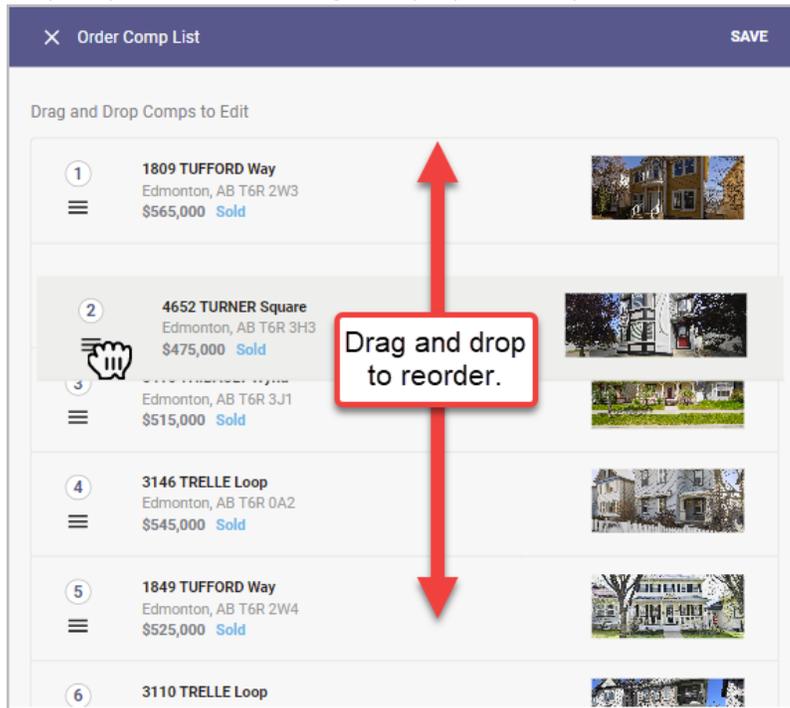
If there are any comps that have been removed that you want to keep, click **Select** at the bottom of the comp card and it will be added back into the selected comp list.

Editing the order of comparables

1. Click **Edit Comp Order**.



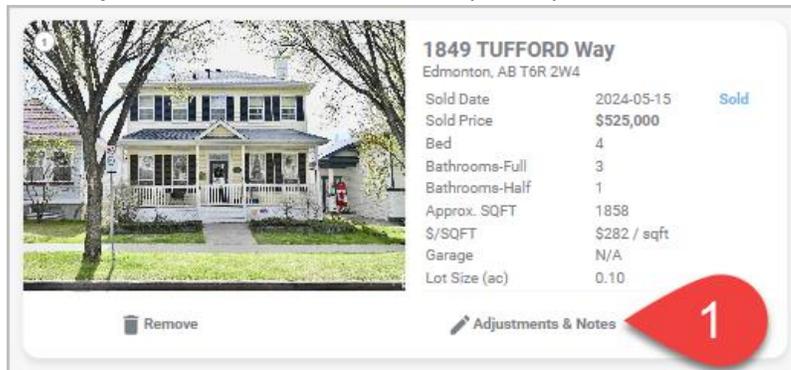
- On the **Order Comp List** page, click and hold the **drag handle** (☰) on a comp, then drag and drop it up or down to arrange the properties in your desired order.



- Click **Save** when you are done or click the **Close** (✕) button if you no longer want to reorder the comps.

Adding adjustments and notes to a comparable

- Click **Adjustments & Notes** on the comp card you want to make adjustments on.



- On the **Edit Adjustments** page, add a monetary value next to the fields you want to adjust. An increase in value can be added as a positive number (e.g., 2500), a decrease in value can be added as a negative value (e.g., -1000).

× Edit Adjustments SAVE



1849 TUFFORD Way
Edmonton, AB T6R 2W4
Price \$525,000 **Sold**

Adjustment Notes

Individual Adjustments

Bedrooms	4	Adjustments +/- 0
Bathrooms Full	3	Adjustments +/- 0
Bathrooms Half	1	Adjustments +/- 0
Approx. Living SQFT	1858	Adjustments +/- 0
Garage Capacity	N/A	Adjustments +/- 0
Lot Size Acres	0.10	Adjustments +/- 0

Note, you can preset the monetary value to automatically be applied in the settings. Learn how to set this up [here](#).

3. Enter an adjustment note explaining why you made the adjustments.

1849 TUFFORD Way
Edmonton, AB T6R 2W4
Price \$525,000 Sold

Adjustment Notes

Individual Adjustments

		Adjustments +/-
Bedrooms	4	0
Bathrooms Full	3	0

4. Click **Save** to save your changes or click the **Close** (X) button to exit without saving the changes.

You have now selected and edited the comparables. Next, we will show you how to generate and view the CMA report.

Generating and viewing the CMA report

Once you have selected and edited the comparables, you can generate and view the CMA report. The CMA report will show you the subject property details, the suggested price and range, the comparables list, the comparables pricing summary, the comparables statistics, and your contact information. You can also view the comparables in a map view or a side by side view.

To generate and view the CMA report, follow these steps:

1. From the **Comparables** page, click **Generate CMA**.

The screenshot displays the 'Comparables' page in the EasyCMA system. At the top, there is a dark blue navigation bar with a menu icon on the left and a home icon on the right. Below the navigation bar is a map showing several property locations marked with price tags and numbers. The map includes labels for neighborhoods like 'ESTATES', 'OGILVIE RIDGE', 'HADDOW', 'LEGER', 'HODGSON', 'WATERWILLEGAR', 'WHI CREEK TWIN', and 'MAGR HEIGHTS'. Below the map, the text 'Comparable Properties 10' is displayed. There are three buttons: 'EDIT COMP ORDER', 'MANUALLY ENTER COMP', and 'GENERATE NEW COMPS'. The first property listed is '1849 TUFFORD Way' in Edmonton, AB T6R 2W4, sold on 2024-05-15 for \$525,000. The second property is '1832 TOWNE CENTRE Boulevard' in Edmonton, AB T6R 3B7, sold on 2024-04-27 for \$530,000. A red circle with the number '1' highlights the 'GENERATE CMA' button for the second property.

Property Address	Sold Date	Sold Price	Bed	Bathrooms-Full	Bathrooms-Half	Approx. SQFT	\$/SQFT	Garage	Lot Size (ac)
1849 TUFFORD Way	2024-05-15	\$525,000	4	3	1	1858	\$282 / sqft	N/A	0.10
1832 TOWNE CENTRE Boulevard	2024-04-27	\$530,000				1890			

2. The report will display with the Google Street View of the property at the top. There are two buttons in the top right corner of the menu bar. The **Home** (🏠) button will return you to the EasyCMA Dashboard at any time. The **More Options** (⋮) button gives you the option to assign a contact or print the report to PDF (more details on printing your report, click [here](#)).
3. As you scroll down the report, you will see the following (click a link to jump to the section):



1863 Tomlinson Way NW

Edmonton AB T6R 2T4

CMA Report last updated on 7/10/2024, 9:00:37 AM

Created For: Benny Beaverbrook

Hello and welcome to your Comparative Market Analysis report! I'm RAE Trainer, your dedicated real estate expert specializing in suburban neighborhoods with serene lake properties. With a passion for finding the perfect home for every family, I bring a unique perspective and a friendly approach to the real estate market.

This report provides a comprehensive overview of current market trends, property values, and recent sales in your area. My aim is to ensure you have all the information you need to make an informed decision. I'm here to help you navigate the market with ease and confidence, finding the ideal home that meets your needs and dreams.

Thank you for trusting me with your real estate journey. Let's dive into the data and discover the value of your property in today's market!

EDIT INTRODUCTION

Suggested Price

\$150,000

\$530K - \$586K Price Range

EDIT PRICE

Property Details

Update any detail not properly updated

Property Sub Type Single Family Residence	Bedrooms Total 4
Bathrooms Full 3	Bathrooms Half 1
Garage Capacity 2	Approx. Living SQFT 1,883.7
Lot Size Acres 0.12	Year Built 1999

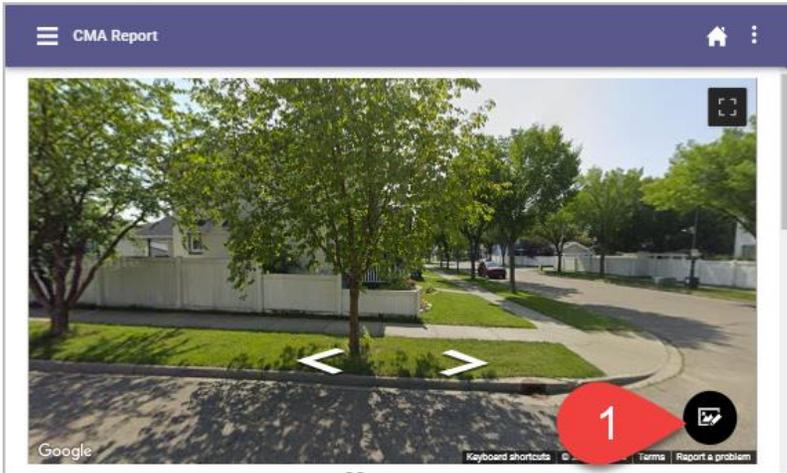


If a section can be edited, an **Edit** button will appear at the bottom of the section. The following sections describe each part of the report and how to edit them, if applicable.

Subject Property Photo

Here you can adjust the google street view or upload a photo.

1. On the Google Street View, click the **Upload Photo** button ().



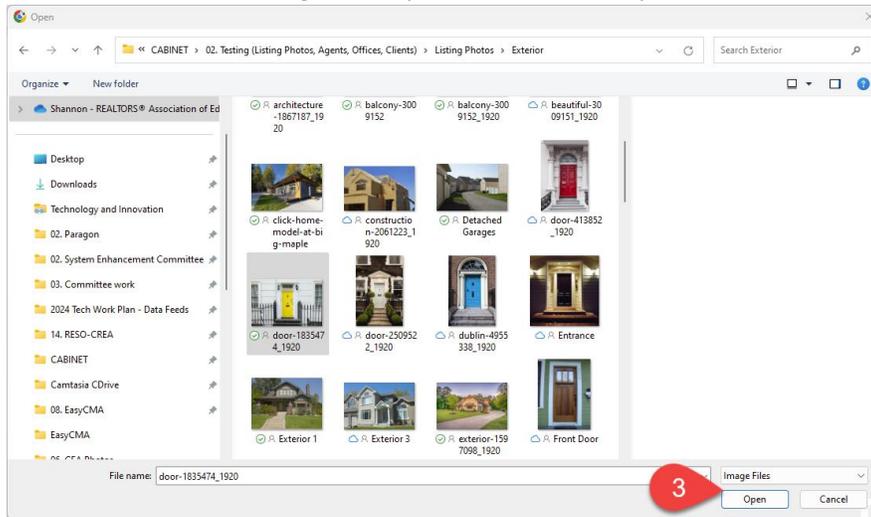
2. If you are on a smart device a pop-up will open with the following options:



A. Take Photo: If you tap this option, your device's camera will open, take a photo of the property, and select **Use Photo** or **Retake** to take another picture.

B. Choose Existing will open your devices photo gallery.

3. Otherwise the file manager will open. Search for the photo, click on it, and click **Open**.



4. Once a photo is selected, it will display on the CMA if it meets requirements. If it is too small, you will receive a message indicating the requirements that the photo must meet.

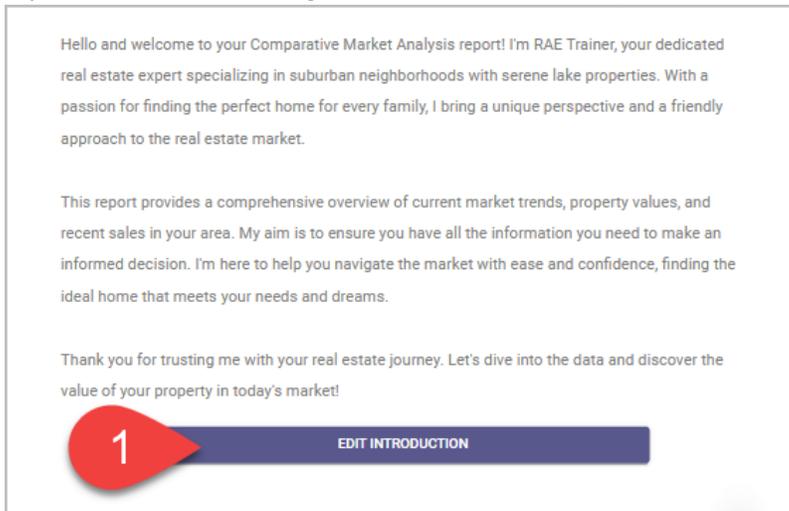


EasyCMA Introduction

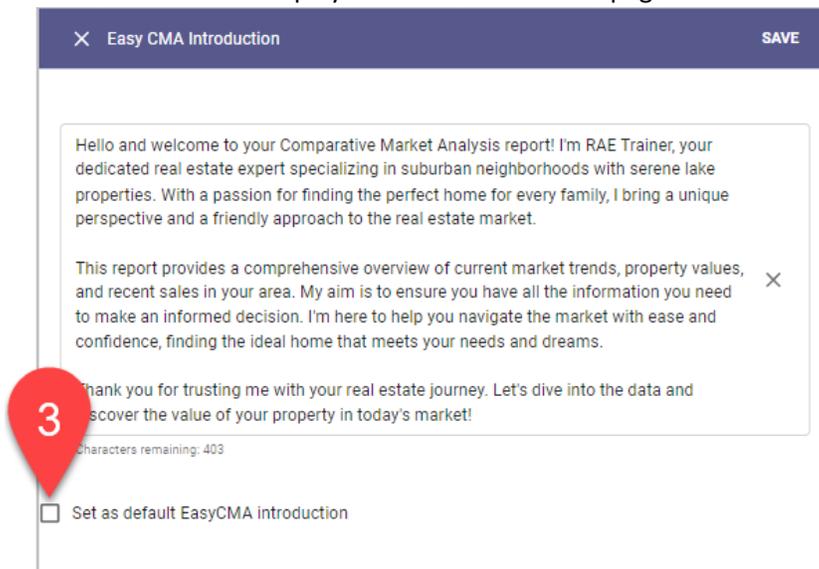
Next, is your introduction for your CMA which will explain the purpose and content of the report to your client. If you have already set up an introduction in your settings it will default here.

Edit Introduction

1. If you want to make changes or add an introduction, click **Edit Introduction**.



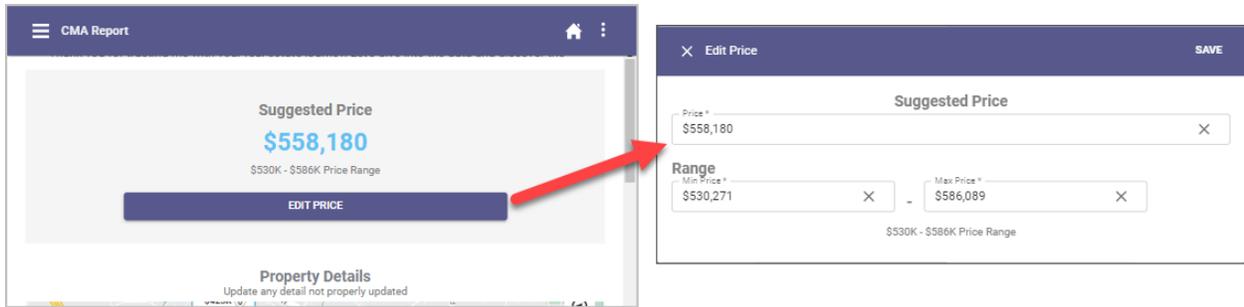
2. Make any changes or enter an introduction to your CMA for your client. There is a 1200-character limit which displays at the bottom of the page.



3. If you want to set your changes to be your new default, select the check box **Set as default EasyCMA introduction**.
4. Once you are done, click **Save** to save the introduction or click **Close** (X) to exit without saving.

Suggested Price

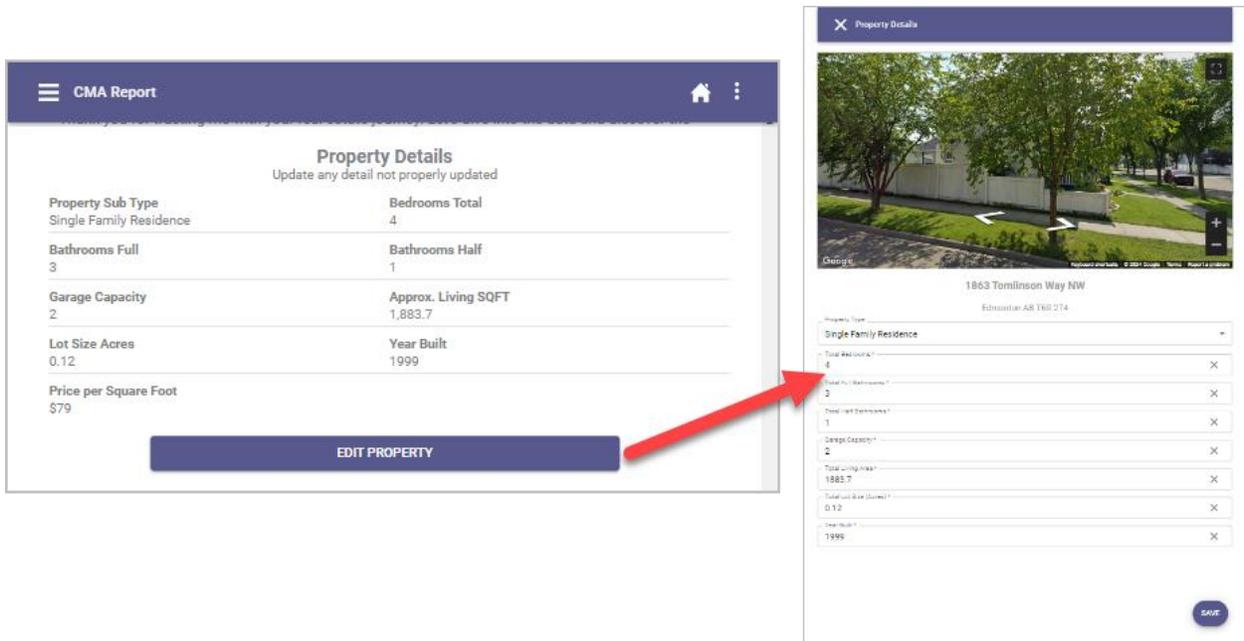
Easy CMA has automatically calculated a suggested price. Click **Edit Price** to change the **Suggested Price** and/or the **Range**.



You will need to adjust the price range if your new suggested price falls out side of the current range.

Property Details

Next is the Property Details you entered when adding the subject property. Click **Edit Property** if details need to be adjusted.



Comparable Properties

Here are all of the comps on the map and the comp cards we picked for the CMA. To view details on a comp, click on the comp card to view the ConnectView.

CMA Report

MAP VIEW SIDE BY SIDE VIEW

Comparable Properties Map

See where each property is located

Subject Property: 10 Sold

Comparable Properties
10

Click to view listing details.

1809 TUFFORD Way
Edmonton, AB T6R 2W3

Sold Date	2024-04-28	Sold
Sold Price	\$565,000	
Bed	3	+65
Bathrooms-Full	3	
Bathrooms-Half	1	
Approx. SQFT	2016	
\$/SQFT	\$280 / sqft	
Garage	2	
Lot Size (ac)	0.10	

[View Notes](#)

4652 TURNER Square
Edmonton, AB T6R 3H3

Sold Date	2024-06-03	Sold
Sold Price	\$475,000	

Adjustments and Notes

1. If there is an Adjustment, it will show to the right of the field that has been adjusted.

1809 TUFFORD Way		
Edmonton, AB T6R 2W3		
Sold Date	2024-04-28	Sold
Sold Price	\$565,000	
Bed	3	+\$5
Bathrooms-Full	3	
Bathrooms-Half	1	
Approx. SQFT	2016	
\$/SQFT	\$280 / sqft	
Garage	2	
Lot Size (ac)	0.10	

View Notes

2. Click **View Notes** to see your notes about the adjustment (if there are notes). Click **Close** () to return to the report.

Notes

1809 TUFFORD Way
Edmonton, AB T6R 2W3
Price \$559,900 Sold

Adjustment Notes

Notes about the adjustment(s) made.

- To edit the comparables, click **Edit Comparables** below the last comparable card.

Comparable Properties
10

1809 TUFFORD Way
Edmonton, AB T6R 2W3

Sold Date	2024-04-28	Sold
Sold Price	\$565,000	
Bed	3	+5
Bathrooms-Full	3	
Bathrooms-Half	3	

[View Notes](#)

10

2349 LEMIEUX PLACE Place
Edmonton, AB T6R 0C3

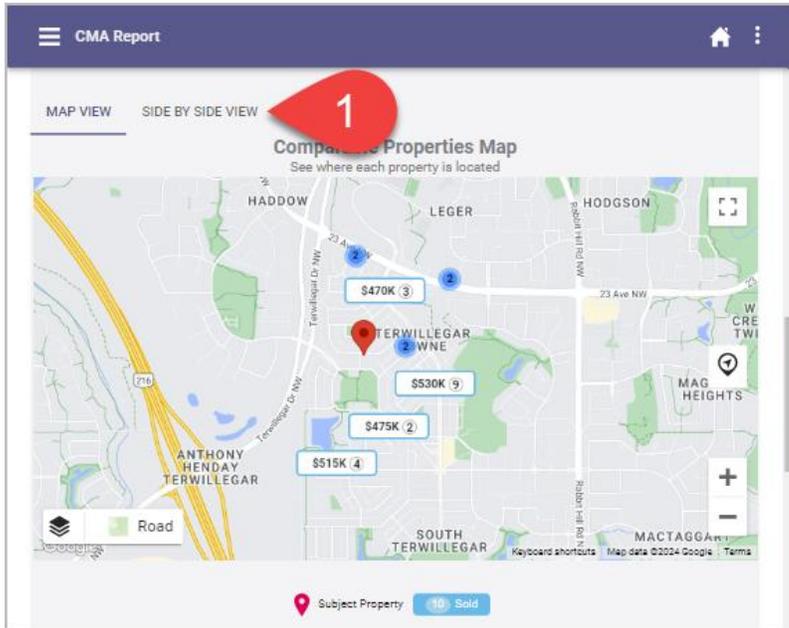
Sold Date	2024-05-09	Sold
Sold Price	\$429,000	
Bed	4	
Bathrooms-Full	2	+2
Bathrooms-Half	1	
Approx. SQFT	1461	
\$/SQFT	\$293 / sqft	
Garage	2	
Lot Size (ac)	0.10	

3 **EDIT COMPARABLES**

- When comps are updated, click **Generate CMA** again. The updated comps will appear and adjust the statistics as well. We recommend double-checking your Suggested Price to ensure it is still what you want it to be.

Viewing the comparables in side by side view

1. Click the **Side by Side View** tab.



- The subject property will appear on the left and the comps will appear on the right. However, if you are on a small device, you will only see one comp at a time.

MAP VIEW SIDE BY SIDE VIEW

Comparable Details

<p>A</p> <p>\$150,000 1863 Tomlinson Way NW Edmonton AB T6R 2T4</p>	<p>B</p> <p>\$565,000 1809 TUFFORD Way Edmonton, AB T6R 2W3 Listing ID: E4384221</p>	<p>\$475,000 4652 TURNER Square Edmonton, AB T6R 3H3 Listing ID: E4390150</p>
Property Sub Type Single Family Residence	Single Family Residence	Single Family Residence
Status Sold	Sold	Sold
Subdivision Name Terwillegar Towne	Terwillegar Towne	Terwillegar Towne
Bedrooms Total 4	3 Adj: +\$5	4
Bathrooms Full 3	3	3
Bathrooms Half 1	1	1
Approx. SQFT 1883.7	2016	1557
Price per Square Foot \$79	\$277	\$295
Garage Capacity 2	2	2
Lot Size Acres 0.12	0.10	0.09
Year Built 1999	2000	2002
Days on Market N/A	2	3
Close Date N/A	4/28/2024	6/3/2024

EDIT COMPARABLES

5

MAP VIEW SIDE BY SIDE VIEW

Comparable Details

		
\$150,000 1863 Tomlinson Way NW Edmonton AB T6R 2T4	\$475,000 4652 TURNER Square Edmonton, AB T6R 3H3 Listing ID: E4390150	\$470,000 1904 TOMLINSON Way Edmonton, AB T6R 2R5 Listing ID: E4374749
Property Sub Type Single Family Residence	Single Family Residence	Single Family Residence
Status Sold	Sold	Sold
Subdivision Name Terwillegar Towne	Terwillegar Towne	Terwillegar Towne
Bedrooms 4	4	4
Bathrooms 3	3	2 Adj: +\$2
Bathrooms Half 1	1	2
Approx. SQFT 1883.7	1557	1582
Price per Square Foot \$79	\$295	\$290
Garage Capacity 2	2	2
Lot Size Acres 0.12	0.09	0.10
Year Built 1999	2002	1998
Days on Market N/A	3	9
Close Date N/A	6/3/2024	3/8/2024

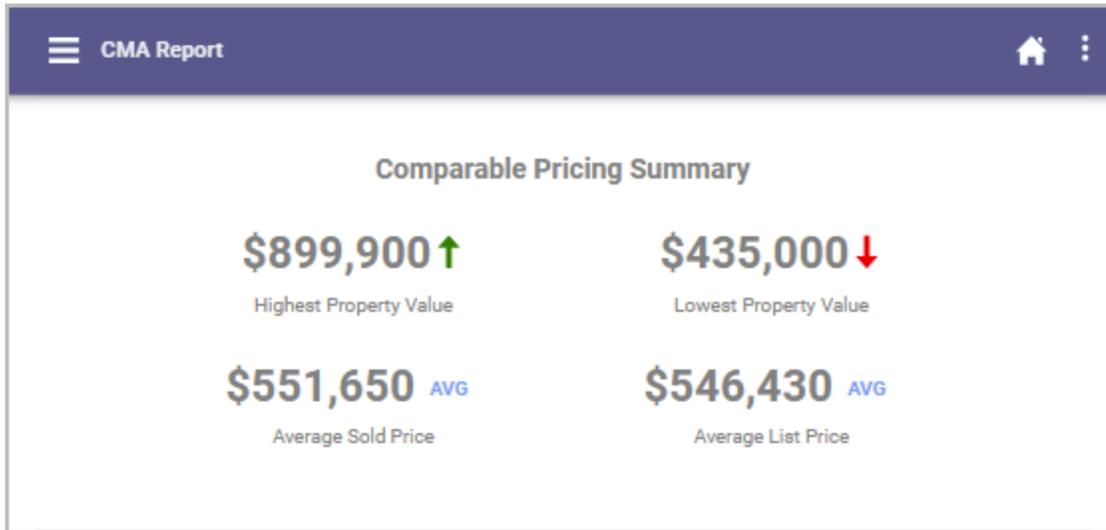
4

3

EDIT COMPARABLES

3. Click the Forward arrow (>) to see the additional comps.
4. Click the Back arrow (<) to go back to previous comps.
5. Click the **Map View** tab to return to the default view.

Comparable Pricing Summary



The Comparable Pricing Summary section provides key statistics for the comparables, including the highest and lowest property values, as well as the average sold price and average list price. This summary offers a quick overview of the pricing landscape for similar properties.

Comparable Statistics

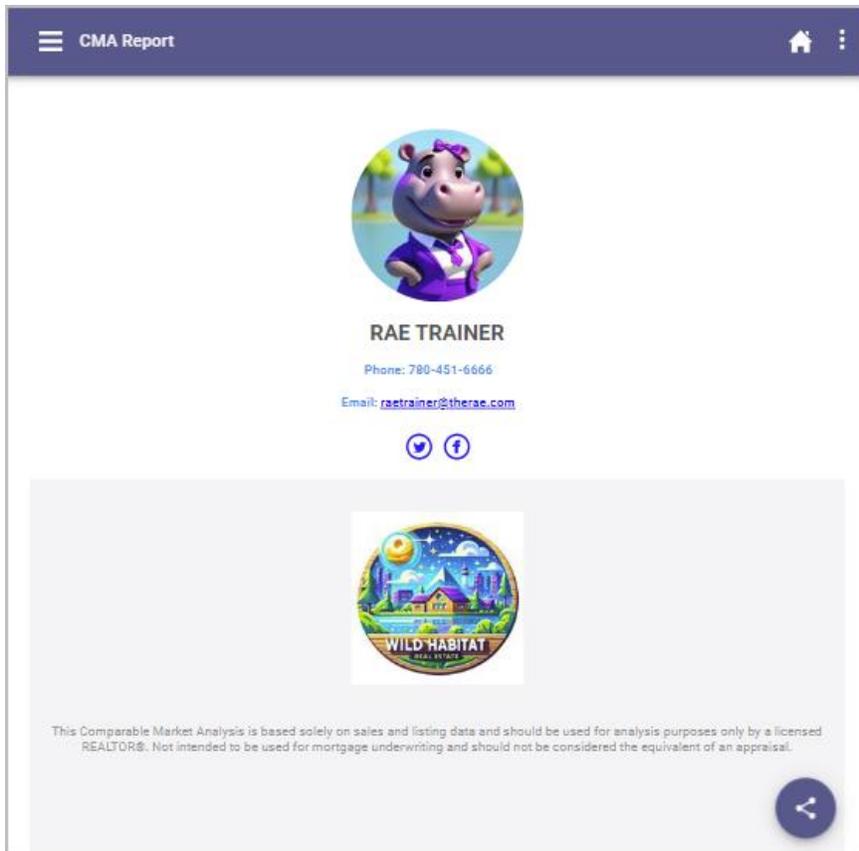


The Comparable Statistics section provides a detailed breakdown of the comparables by status, presented with a doughnut graph for visual clarity.

Each status category includes key metrics such as average list price, average sold price and percentage of sale price to list price.

This analysis helps in understanding the market performance of comparable properties at a glance.

Agent Information and Office Logo, and Disclaimer



The report footer features your Agent Name, Photo, and contact details, along with your office logo, which can be customized in your settings. For instructions on editing these details, click [here](#) for more information.

At the bottom of the report is a RECA approved disclaimer, which is required and cannot be edited. For additional details, please refer to this [link](#).

You have now generated and viewed the CMA report. Next, we will show you [how to email, text and print the CMA report](#).