

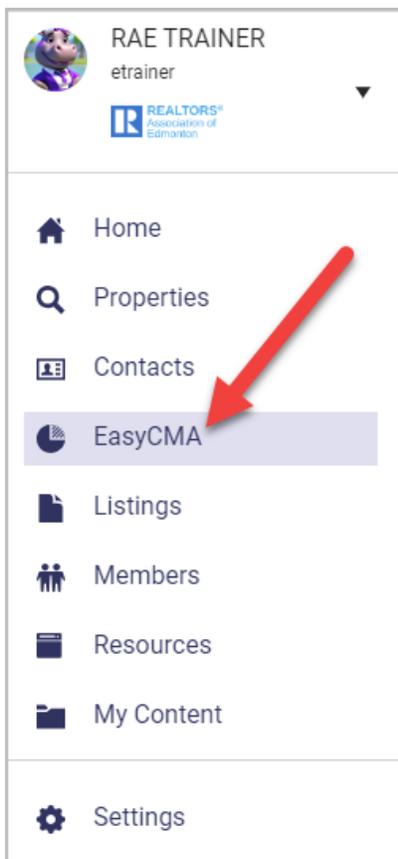
# Easy CMA: How to access and the EasyCMA Dashboard

EasyCMA is a feature of Paragon Connect, which is a web-based platform that lets you use Paragon from any device and browser. You can also get to EasyCMA from Paragon Pro, which is the desktop version of Paragon that you know well. However, when you do that, it will launch a new browser tab that takes you to the EasyCMA Dashboard within Paragon Connect.

- Accessing EasyCMA
- EasyCMA Dashboard

## Accessing EasyCMA

To access EasyCMA from Paragon Connect, follow these steps:

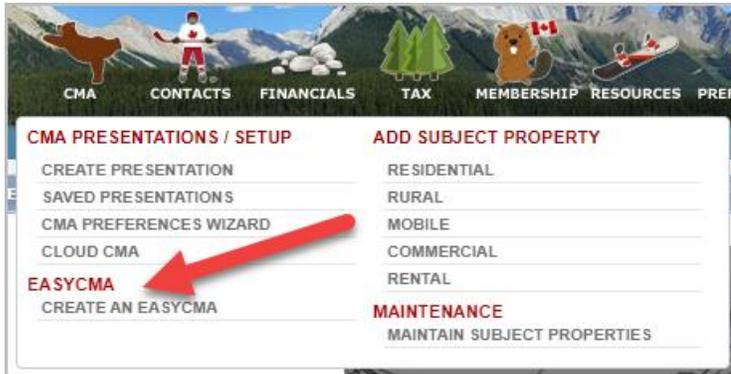


1. Log in to [Paragon Connect](#) using your Paragon login.
2. Click the **Menu** (☰) button and click **EasyCMA**. This will open the EasyCMA Dashboard in the same browser window.
- 3.

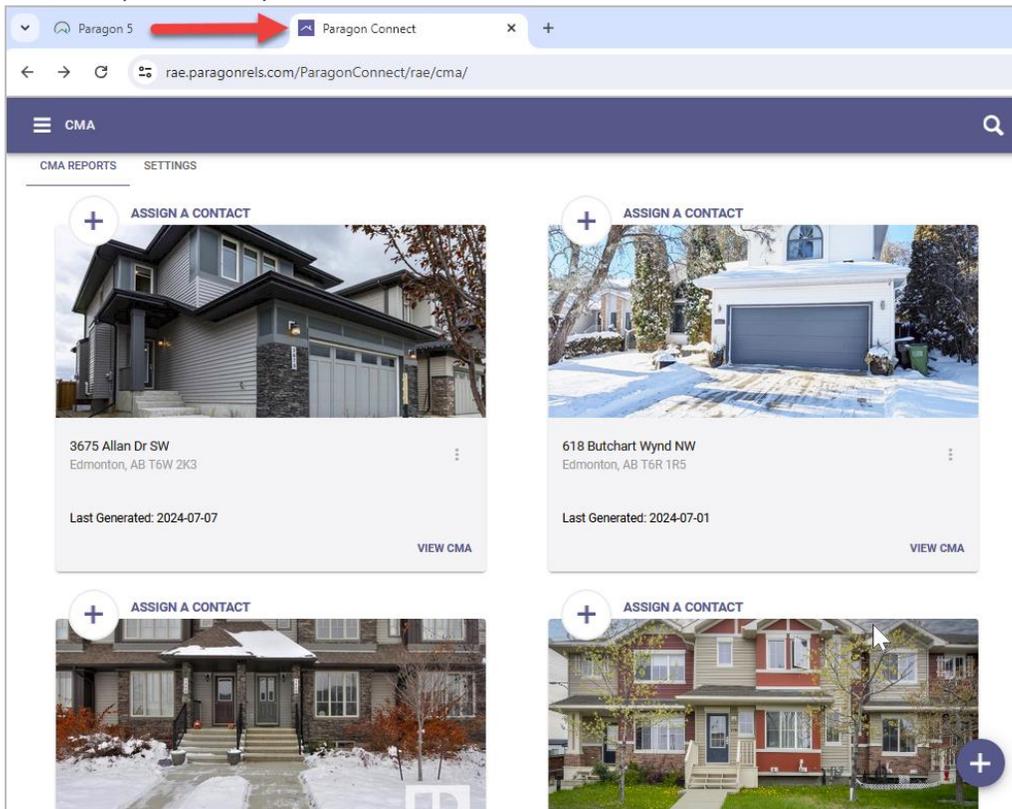
To access EasyCMA from Paragon Pro, follow these steps:

1. Log in to Paragon Pro using your Paragon Login.

2. Click **CMA**, then click **Create an EasyCMA**.



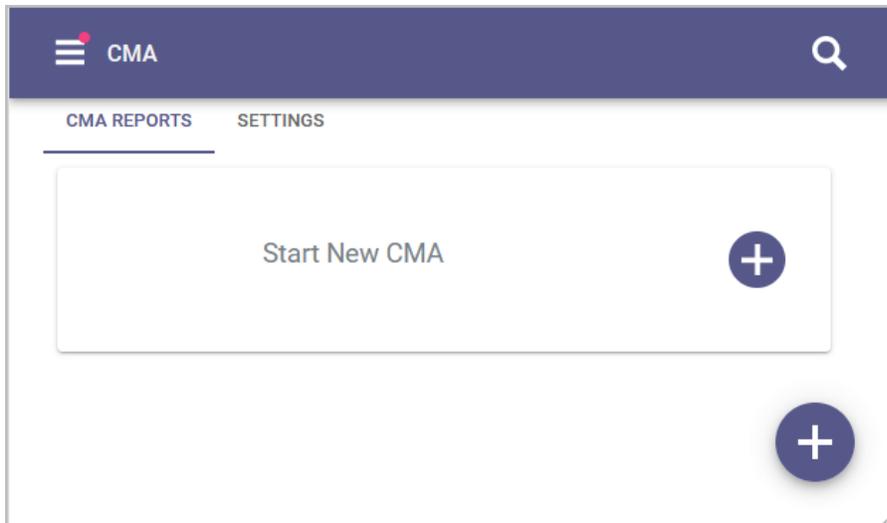
This will open the EasyCMA Dashboard in a new browser tab.



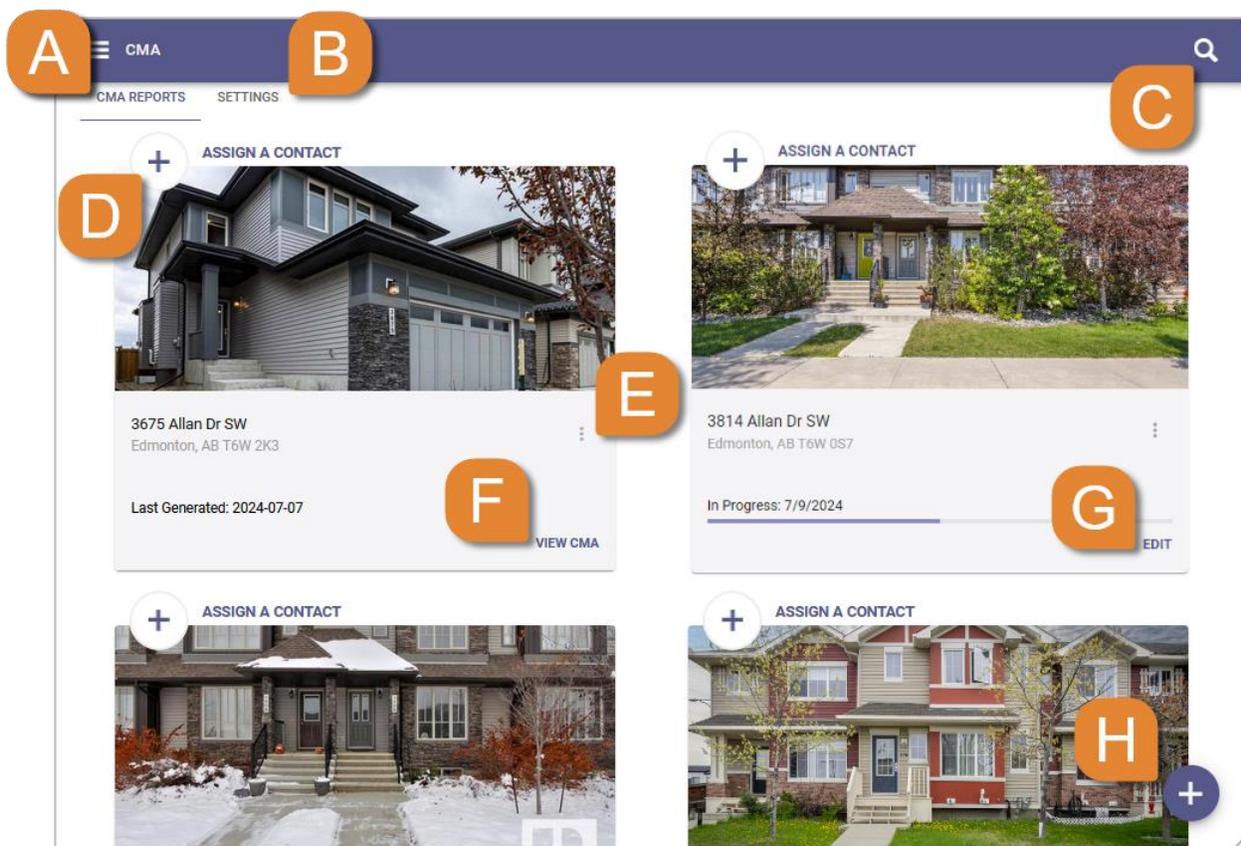
## EasyCMA Dashboard

The EasyCMA Dashboard is where you can create, view, and manage your CMA reports.

If you've never created a CMA before, there will only be a **Start New CMA** template card to get you started.



The following screenshot provides a detailed overview of the dashboards features, with each letter corresponding to a specific action described in the list below.



A. The **CMA Reports** tab will display any CMAs that have been created or in progress.

**B.** The **Settings** tab will allow you to set certain preferences that will default on your CMAs.

**C.** Click the magnifying glass icon () to **Search** for a CMA by address or contact name.

**D.** Assign a CMA to a Contact.

**E.** Click the **More Options** () menu to delete a CMA or remove an assigned contact (if there is one assigned).

**F. View CMA** opens the CMA Report where you can edit the report, share via email or text and print it.

**G.** If a CMA is In Progress, click **Edit** to continue working on it.

**H.** Click the **Add** () button to start a new CMA.

Next, we recommend setting up your EasyCMA settings.