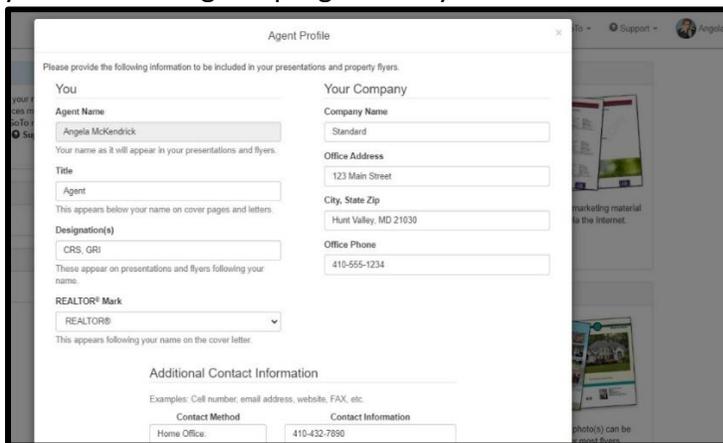


ToolkitCMA™ Startup Guide

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.

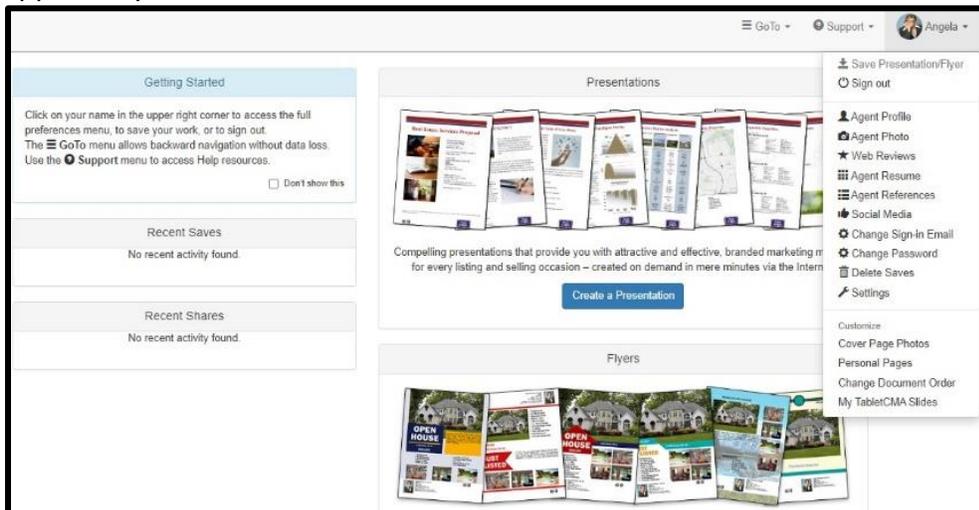


The screenshot shows the 'Agent Profile' form with the following fields:

- You:** Agent Name (Angela McKendrick), Title (Agent), Designation(s) (CRS, GRI), REALTOR® Mark (REALTOR®).
- Your Company:** Company Name (Standard), Office Address (123 Main Street), City, State Zip (Hunt Valley, MD 21030), Office Phone (410-555-1234).
- Additional Contact Information:** Contact Method (Home Office), Contact Information (410-432-7890).

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.



The screenshot shows the main interface with a 'Preferences' dropdown menu open. The menu options include:

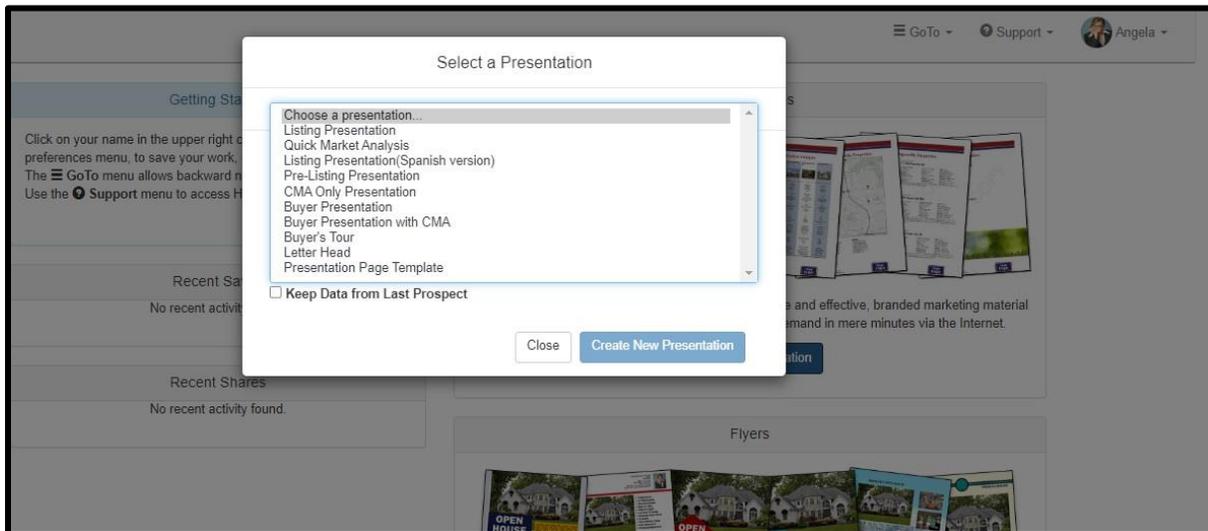
- Save Presentation/Flyer
- Sign out
- Agent Profile
- Agent Photo
- Web Reviews
- Agent Resume
- Agent References
- Social Media
- Change Sign-In Email
- Change Password
- Delete Saves
- Settings
- Customize
 - Cover Page Photos
 - Personal Pages
 - Change Document Order
 - My TabletCMA Slides

The background shows a 'Presentations' section with a 'Create a Presentation' button and a 'Flyers' section with various flyer thumbnails.

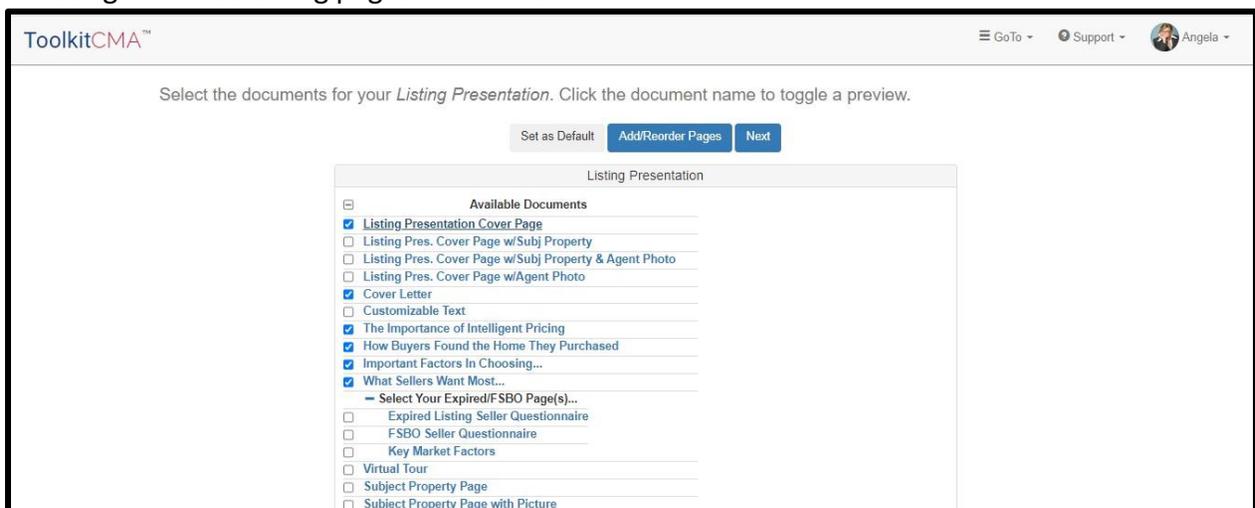
Starting Your First Presentation

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.

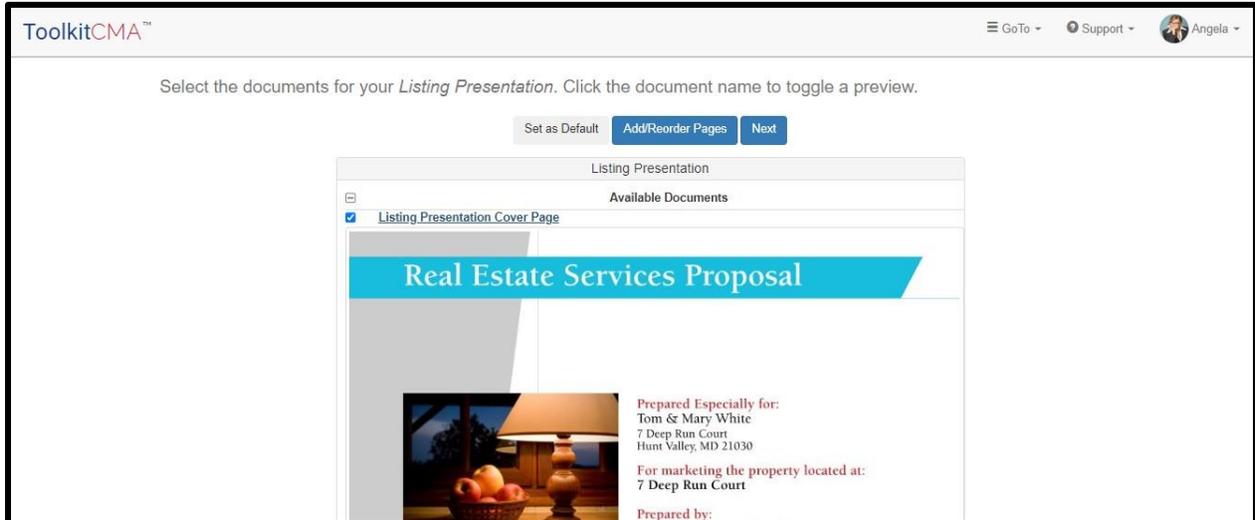
From the **'Home'** screen, click on the **Create Presentation** button. (If you are not already on the **'Home'** screen, you can get there by clicking **"GoTo"** and choose the page link for **Home**.) You will be prompted to select a presentation. Click on the type of presentation you'd like to work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



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.



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.



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.

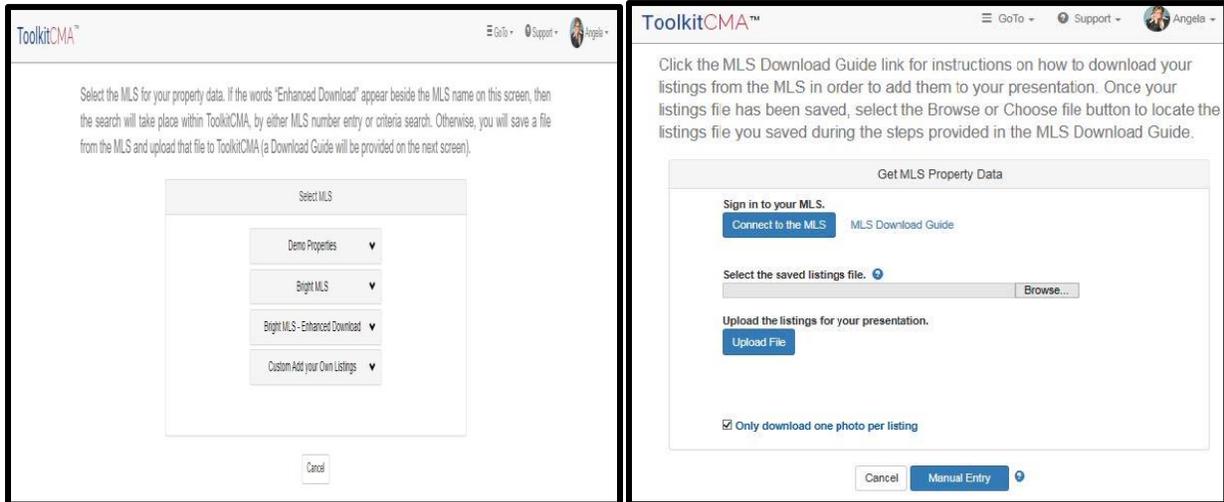
The screenshot shows the ToolkitCMA™ interface for the 'Prospect Information' screen. At the top, there is a navigation bar with 'GoTo', 'Support', and a user profile for 'Angela'. Below the navigation bar, a message reads: 'Please provide the required prospect information. This information will be merged with some of the documents you selected to be included in your Listing Presentation'. The form is titled 'Prospect Information' and contains the following fields:

- Presentation Date: October 14, 2022
- Name: Tom & Mary White
- Mailing Street Address: 7 Deep Run Court
- Mailing City, State, Zip/Postal Code: Hunt Valley, MD 21030
- Name in cover letter salutation: Tom & Mary
- Subject Property Street Address: 7 Deep Run Court
- Subject Property Zip/Postal Code: 21030

At the bottom of the form, there are four buttons: 'Use Last Prospect', 'Reset', 'Saved Prospects', and '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™.



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.

The screenshot shows the 'Select Properties' screen in ToolkitCMA™. At the top, there are buttons for 'Get MLS Property Data', 'Manual Entry', 'Delete Marked', 'Delete UnMarked', and 'Next'. Below these is a table of property listings with columns for Edit, Status, MLS #, Address, Beds, Baths, Sqft, List Price, Sold Price, Sale Date, LS/Sqft, SS/Sqft, and More Info. Each row includes a checkbox for selection and a photo thumbnail.

<input type="checkbox"/>	Edit	Status	MLS #	Address	Beds	Baths	Sqft	List Price	Sold Price	Sale Date	LS/Sqft	SS/Sqft	More Info.
<input type="checkbox"/>		S	BC2163415	12 Old Padonia Rd	4	3/1	5384	\$789,000	\$755,000	11/21/04	\$147	\$140	
<input type="checkbox"/>		S	BC2185356	24 Springhill Farm Ct	4	3/1	4000	\$899,900	\$850,000	08/12/04	\$225	\$213	
<input type="checkbox"/>		S	BC2218359	12002 Boxer Hill Rd	6	4/1	5282	\$850,000	\$790,000	09/30/04	\$161	\$150	
<input type="checkbox"/>		S	BC2238974	205 Warren Rd	2	2/1	4530	\$899,000	\$885,000	10/17/04	\$198	\$195	
<input type="checkbox"/>		S	BC2246624	12993 Jerome Jay Dr	5	3/1	4872	\$899,000	\$830,000	12/16/04	\$185	\$170	

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.)

ToolkitCMA™ GoTo 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
Average Price: \$808,200

Off The Market
Number of Properties: 5
Average Price: \$895,140

Create Presentation

Listing Presentation
for Tom & Mary White

Include a Tablet Presentation

[Choose Slides](#) [Create Presentation](#)

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.

ToolkitCMA™ GoTo Support Angela

[View PDF](#) [Tablet](#) [Share](#) [Zoom Meeting](#) [Text Message](#) [Save](#) [Home](#)

Summary of Presentation

Prepared on:
October 14, 2022

Type of Presentation:
Listing Presentation

Prepared by:
Angela McKendrick
Standard

Prepared for:
Tom & Mary White
7 Deep Run Court

Comparable Properties

St	MLS #	Address	LP	SP
S	Bc2163415	12 Old Padonia Rd	\$789,000	\$755,000
S	Bc2185356	24 Springhill Farm Ct	\$899,900	\$850,000
S	Bc2218359	12002 Boxer Hill Rd	\$850,000	\$790,000
S	Bc2238974	205 Warren Rd	\$899,000	\$885,000
S	Bc2246624	12993 Jerome Jay Dr	\$899,000	\$830,000
S	Bc2286699	19 Chris Eliot Ct	\$849,000	\$725,000
S	Bc244178C	508 Shawan Rd	\$885,000	\$855,600
S	Bc246266C	4 Chamaral Ct	\$799,000	\$775,000
A	Pc3109830	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.

1. **“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.
2. **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 <https://www.realtytools.com/cma/webinars>.
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.
5. **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.