Technology Concepts, Inc.

MyPlaceConnection™
CMA and Stats

Quick Reference Guide

***MyPlaceConnection*™ CMA and Stats for Agents**

A product of
Technology Concepts, Inc.

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This document offers instruction specifically for *MyPlaceConnection* CMA and Statistics.

CMA

The CMA function is tied to the *MyPlaceConnection* client manager. A CMA can be done for an existing customer or a new customer.

ADD A CUSTOMER FOR A CMA

Two types of customers can be added, those with an email account (create login) that will actively log-in to the site and those who may not have internet access or email (no login) and will not be using the site. To add a customer click MyTools, Client Manager and then Add A Customer hot link found on the left side of the screen.

Login Customer – Click Add A Customer and select create login. Required fields which must be filled in are First Name, Last Name, Email, User Name and Password. Optional information can be filled in such as address and additional contact information. Customers can be assigned different roles for where they are at in a listing transaction.

Is Buyer – Click this box if the customer is a buyer and a listing that is of interest can be tied to the customer. The system automatically moves them to the buyer category of the client manager. When the listing goes to pending the customer automatically moves to a pending buyer. Similarly, when the listing is closed the pending buyer is automatically moved to a closed buyer in the client manager.

Is Seller – Click this box if the customer is selling their home and select the seller's listing to tie the customer to the listing. This allows a seller to see web stats for their listing. The system automatically moves them to a pending seller category when their home is pending and a closed seller when their home is sold.

Is Client – This role is only available to login customers. The client role allows the customer to see additional information about a listing such as what would be given to a customer on a printed fact sheet.

The registration email section is next. This contains the text of the email that will be sent to a customer after they have been added as a customer. Enter the subject desired. The additional text allows the agent to personalize the email or add more information as desired. The system message information follows with a copy option for the agent to receive the email as well as the customer. Click Update when complete and an email will be sent to the customer inviting them to sign in to the site.

No Login Customer – Click Add A Customer and select no login. Required fields which must be filled in are First Name, Last Name. Email is an optional field as well as any additional contact information such as address or telephone numbers. A no login customer can be assigned two roles, a buyer or seller role.

A no login customer can be changed to a login customer at any time by editing the customer profile. In the client manager find the desired customer (see Client Navigation) and from the detail customer view (click the hotlink of customer name from the summary view) click the edit profile button and follow instructions for the login customer.

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Is Seller – Click this box if the customer is selling their home and select the seller's listing to tie the customer to the listing. The system automatically moves them to a pending seller category when their home is pending and a closed seller when their home is sold.

Search Listings for CMA

When searching listings for a CMA you should select the customer to do your search for or create a fictional customer name to work with such as a customer named "Home CMA". There are 2 ways to do searches on behalf of a client or customer. From the Search | Find a Listing menu or from within the client manager in a customer detail on the Search or Saved Search hotlink.

Listing Search

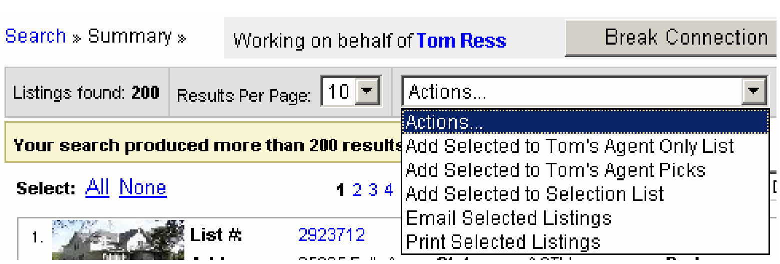
Log in to the web site and click on *Search* and *Find a Listing* from the menu bar. You are brought to the listing search page.

At the top of the search page is a Work With and Connect To drop down selection. To find the customer name desired click the drop down for Work With: and select the category the customer is in. Click the drop down on the Connect to: and select the customer or fictional customer name desired.

You are now working on behalf of your customer so searches and selections done are tied to the customer. Any customer saved searches or agent saved searches for the customer can be accessed by clicking on the saved search hotlink on the left side of the screen. When using a saved search, modify the search criteria filled in as desired and click search.

To stop working with a customer or to work with another customer click the *Break Connection* button.

Selecting Listings



The search results are displayed in a summary view. Listings can be selected by checking the selection box next to the listing photo and clicking the Actions… drop down. Select Add to Customer Agent Picks or Agent Only List.

Saved Searches – You can also work with a customer's listings from the search or saved search hotlinks within a customers detail page. Sign in to the web site go to My Tools and Client Manager.

| **Profile** | Review List | Saved Searches | Search | CMA | Message Center | Private Notes |

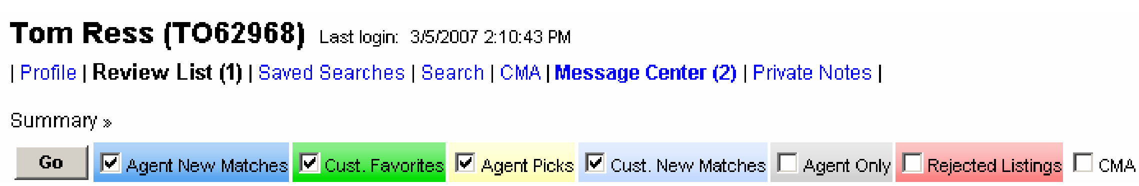
To see a summary of any agent and customer saved searches for a specific customer click on the Saved Search hotlink.

My Saved Searches – Contains a summary of the saved search information an agent has for a customer. Clicking on the hotlink for the saved search will take you to the search screen with the search criteria filled in allowing you to edit and save the search information again or work with the search results on a customer's behalf. An agent can have more than one saved search for a customer.

Customer Saved Searches – Contains a summary of the saved search information a customer has saved for themselves. An agent can click on the hotlink for a customer saved search to work with the search criteria filled in on the search screen. An agent can view a customer's saved search and use the criteria to work on a customer's behalf however an agent can not edit or delete a customer's search information.

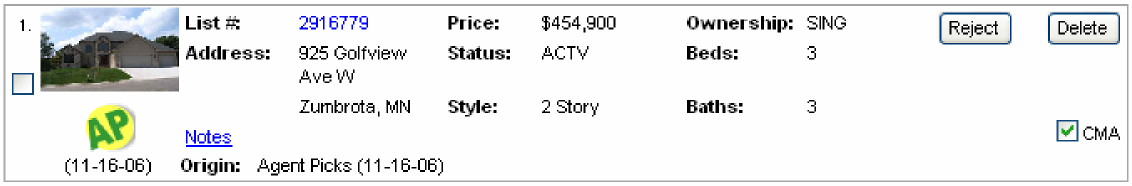
CMA – Listings for a CMA are selected from the customer's review list. If there are no listings in the review list see **Search Listings for CMA**. After listings have been selected for a customer in the review list you need to select listings for the CMA. Click on My Tools and Client Manager and go to the Review List hotlink.

Review List is an overview of listing activity for a specific customer and where listings for a CMA are selected from. Click the Review List hotlink to select desired list(s) to review for a customer.



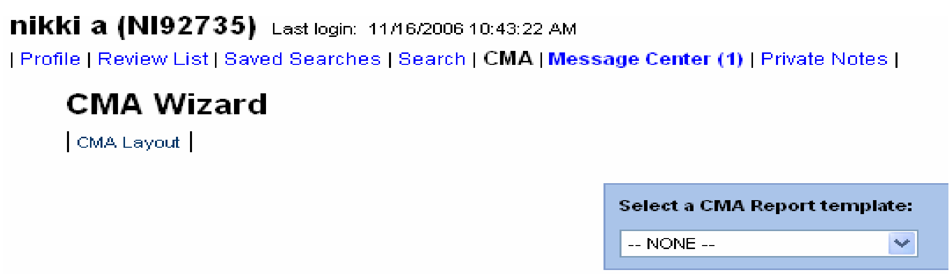
Listing Selections – Seven types of lists are available for review.

- Agent New Matches are listings the agent needs to review for a customer. These listings come from the agents saved search for the customer.
- Customer Favorites are listings the customer has put into their favorites folder. The agent can only review the list or leave a note on these listings.
- Agent Picks are listings the agent has selected for the customer or that came from the agents search with the option of auto send agent new matches in the customer profile turned on.
- Customer New Matches are listings that come from the customers saved search.
- Agent only listings are listings that the agent wants to put into the customers review list but not let the customer see the listing as picked for them by the agent. This option is used in CMA selections most commonly.
- Rejected listings are listings that the customer or agent has removed from a list or reject.
- CMA listings are listings that are currently used or have been used in a CMA for this customer.



On the right side of the screen click the CMA box or boxes for listings to use with a CMA. A system message will appear to let you know the selected listing(s) is being saved for use in a CMA.

CMA Wizard – Click on the <u>CMA</u> hotlink. The CMA is done using templates and a CMA wizard to guide you through creating a new or working with an existing CMA after listings have been selected for the CMA (see **CMA)**. An existing CMA can be referenced at any time by clicking on the CMA option from within a customer's detail page.

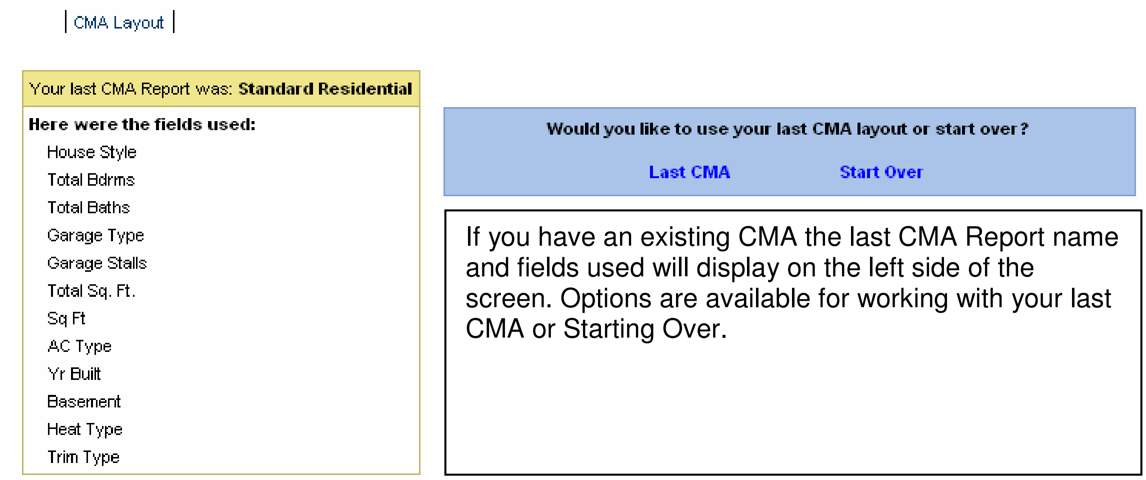


Create a New CMA

Select a CMA Report template from the drop down. System templates will be available as well as any templates that an agent has created and saved for their own use. To begin:

1. Click the drop down and select an available report template
2. Click **Edit** to change the CMA fields as desired
3. Select fields desired from the available list
4. Click **save new**
5. Name the Custom Template as desired
6. Click **Save and Exit**
7. Again choose desired template
8. Click **Next**
9. Choose to use an existing listing for the CMA subject property or enter your own subject property
   - Existing Listing
     - Click **existing**
     - Enter a listing number
     - Click **next**
   - Enter Your Own Subject Property
     - Click **Enter Data**
     - Fill in Subject Property Fields
     - Click **Next**
     - To add a photo to the subject property click **Upload New**
     - Click **Browse** and select Subject Property Photo
     - Click **Upload**
     - Click **Next**
10. Enter Adjustments for a comparable
11. The CMA is automatically saved and can be printed from the adjustments page using the print hotlink on the upper right side of the adjustments screen

Work with an Existing CMA



If you have an existing CMA the last CMA Report name and fields used will display on the left side of the screen. Options are available for working with your last CMA or Starting Over.

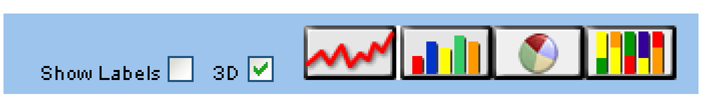
1. Click **Last CMA** or Start Over (see Step 1 Create a New CMA)
2. Select **Use Existing** Subject Property or Pick a New One (see step 9 Create A New CMA)
3. Make modifications to adjustments or print as desired

Market Stats

Statistical information related to the local market and shopper activity is available in this section. Data warehousing techniques and statistical methods are used to produce highly targeted historical trend information in user-specified market segments.

Market Performance

To use Market Performance information sign in to the web site click on Market Stats and select Market Performance. Market Performance calculates and displays market trends through several options of criteria and report formats. Enter the definition of the desired market segment, press the display chart button, and almost instantly market trend information will display for the segment entered. Charts are based on initial list price, final list price, selling price, days on market, absorption rate, etc. Comparisons can also be done on things such as house styles in a particular market. Displaying the results of the reports can be manipulated by displaying labels on the charts, selecting 3-dimensional charts or changing the graph selection as desired.



There are four reports available to display market performance statistics.

Status

The status report displays the number of listings for a particular status in a set timeframe by desired location or other criteria.

1. Select the Frequency for the report
2. Enter or change time period as desired
3. Enter Location if desired
4. Enter Style if desired

5. Enter Bedrooms if desired
6. Select a status for comparisons or select multiple statuses
7. Click Show Chart

Absorption

The absorption report is a report of market saturations which displays the ratio of on and off market listings.

1. Select the Frequency for the report
2. Enter or change time period as desired
3. Enter Location if desired
4. Enter Style if desired
5. Enter Bedrooms if desired
6. Select an absorption type or select multiple types for comparison
7. Click Show Chart

Market Days

The market days report shows the number of days on market for closed listings matching selected criteria.

1. Select the Frequency for the report
2. Enter or change time period as desired
3. Enter Location if desired
4. Enter Style if desired
5. Enter Bedrooms if desired
6. Select desired item to compare on the report – style, bedroom, average price, average total square foot, average main square foot, average above square foot, city, area, or subdivision.
7. Select criteria for the compare based on item previously selected
8. Click Show Chart

Price

The price report shows the prices of properties matching selected criteria.

1. Select the Frequency for the report
2. Enter or change time period as desired
3. Enter Location if desired
4. Enter Style if desired
5. Enter Bedrooms if desired
6. Select desired item to compare on the report – style, bedroom, average price, average total square foot, average main square foot, average above square foot, city, area, or subdivision.
7. Select criteria for the compare based on item previously selected
8. Click Show Chart

MARKET METER

To use the market meter sign in to the web site click on Market Stats and select Market Meter. The market-meter offers information for real-time buyer preference indexing or another definition is a demand curve of what active people using the web site are looking for. Type in the parameters for the prospect's home or desired property and the system produces a marketability index. This index analyzes the saved searches and favorites lists of system shoppers to generate a demand index. When combined with the current inventory of this type of property, a proprietary algorithm computes a marketability index. This index can be very useful in showing prospects the impact of a price on their home's marketability.

1. Enter initial price
2. Enter ownership

3. Enter Bedrooms
4. Enter Bathrooms
5. Select a house style
6. Select a city
7. If you want to display a comparison select a city or style to compare your criteria to
8. Click Go

You can use the market meter chart to zoom in or out to make pricing determinations based off of market trends. The market meter can also be printed for future reference.

ITEMS TO INCLUDE IN A CUSTOMER PACKET

There are a number of things you can include in a sales or presentation packet to provide information and share your market knowledge with customers. Here are some suggested items to include in a customer packet:

- CMA Worksheet
- Feature sheets of each comparable
- Statistics of the local market
- An “about me” page
- A “my statistics” page
- An “about my company” page
- A marketing plan
- A guarantee of service
- “How to” information such as preparing a home for sale