

Create a Comparative Market Analysis (CMA) in Matrix

Create a Comparative Market Analysis (CMA) in Matrix. Use CMA Manager when Classic Mode is off, or the Classic CMA Wizard from My CMAs when Classic Mode is on.

CMA Manager (New)

Use this path when Classic Mode is off. Open the Utility Menu (look for [Hello, Your Name] at the top right). Classic Mode is unchecked.

1. Open MY MATRIX > CMA Manager.
2. Select New CMA Report.
3. In the New CMA dialog, add a Subject Property and a Contact.
4. Select Create CMA. Matrix opens the CMA editor.
5. Optional: select Find More Comps, check the listings you want, then select Add Selected To CMA.
6. Use the editor tabs as needed: Subject Property, Map, Comparison, Property Full, and Summary.
7. Select Save CMA when you want to keep your work. Use Personalize or Share when you are ready to adjust branding or send the report.

Saved reports appear on the CMA Manager list. You can filter, sort, and open them again from there.

Classic CMA Wizard

Use this path when Classic Mode is on. The wizard steps are Start, Pages, Subject, Cover, Comparables, Map, Adjustments, Pricing, and Finish.

1. Open MY MATRIX > My CMAs.
2. Select Start a New CMA.
3. On Start, choose a contact under Select Contact Name (or select Create a New Contact). Optional: enter a Description.
4. On Pages, click pages under Available Pages (left) so they appear under Selected Pages (right). Expand a category if needed, then select individual pages or a category to add. Reorder with move up / move down, or use Remove, Clear, Set as Default, or Restore Defaults as needed. Pages must be in Selected Pages before print will work.
5. On Subject, set the subject property: type fields manually, enter a listing ID and select Fill, or select Search for a Property listing to auto-fill from.
6. On Cover, set the subject cover photo if you use one, and review contact and agent information.
7. On Comparables, select Add from Listings or Add from Cart and add the listings you want in this

CMA.

8. Continue through Map, Adjustments, and Pricing as needed for your report.

9. Open Finish to print or complete the CMA. Use Save CMA on any step to keep the report; Delete CMA and Quit cancels the wizard.

CMAs on this list are kept for 180 days from the last modified date, then removed automatically.

Tips

- Contacts are managed separately - see Add and Manage Contacts in Matrix.

- Listing carts can feed Classic comparables via Add from Cart - see Use Listing Carts in Matrix for Client Collections.

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