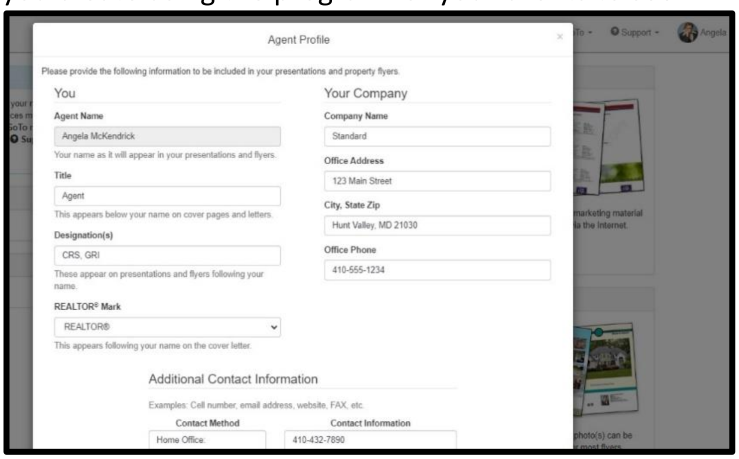
# ToolkitCMA™ Startup Guide

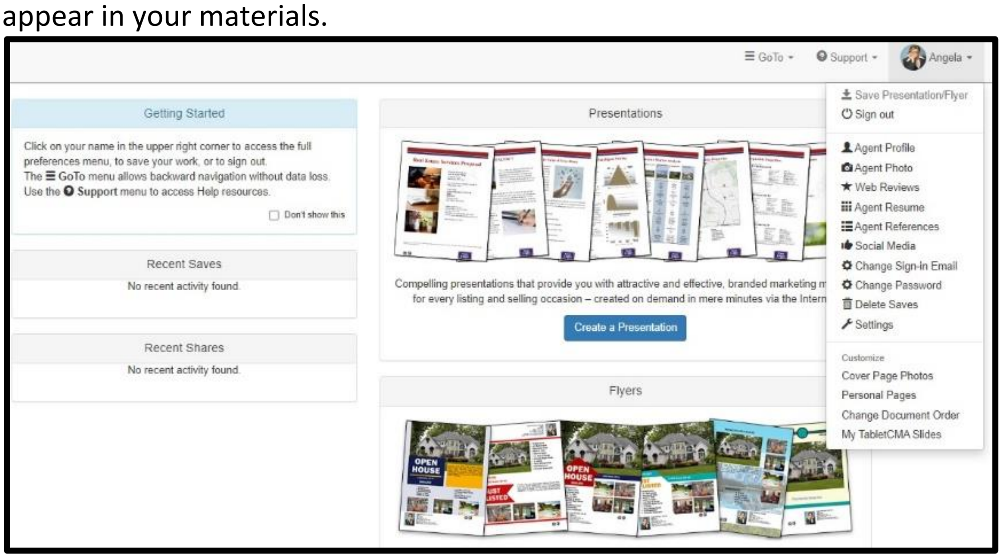
**Edit Your Agent Profile**

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.




**Reviewing your Preferences**

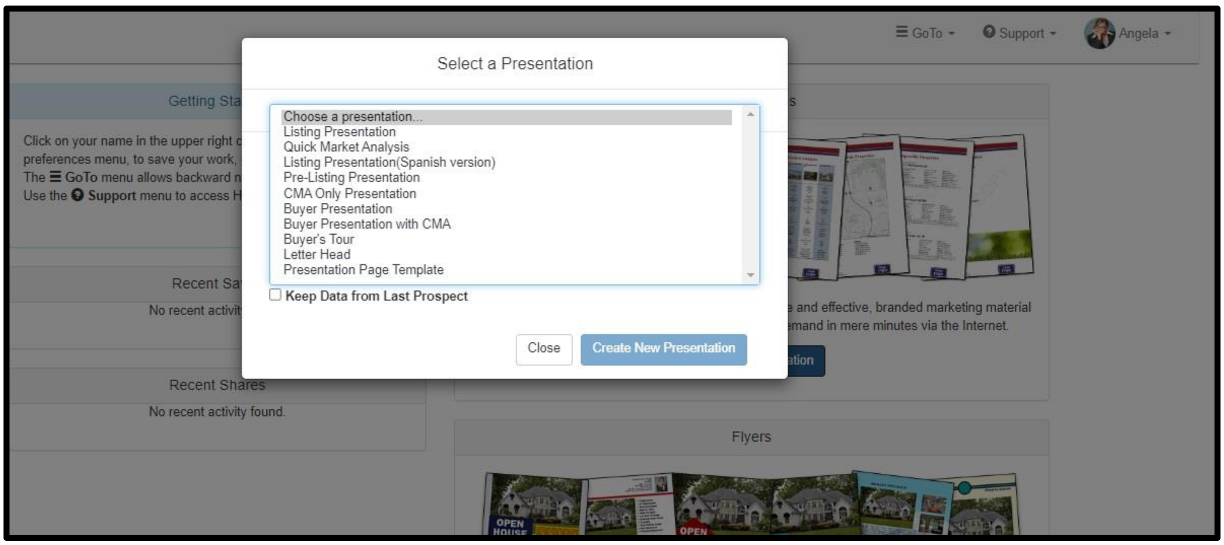
After saving the Agent Profile information, you can click on your name in the top right corner for the Preferences. Here you can update several different preference options used throughout ToolkitCMA™. We suggest you begin by verifying your photo, resume and references that will appear in your materials.



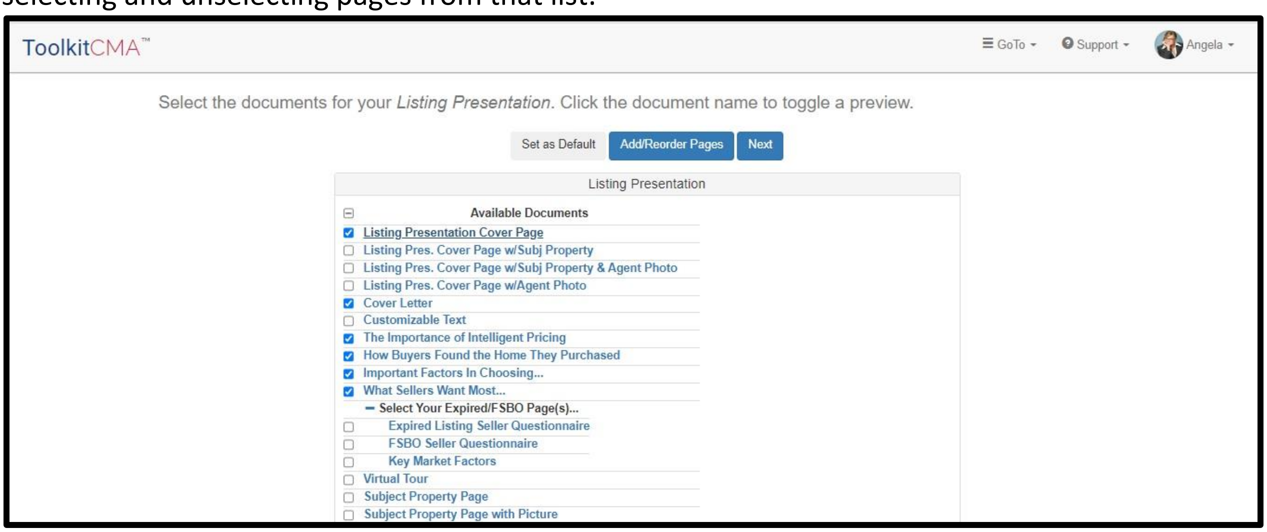
## Starting Your First Presentation

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.

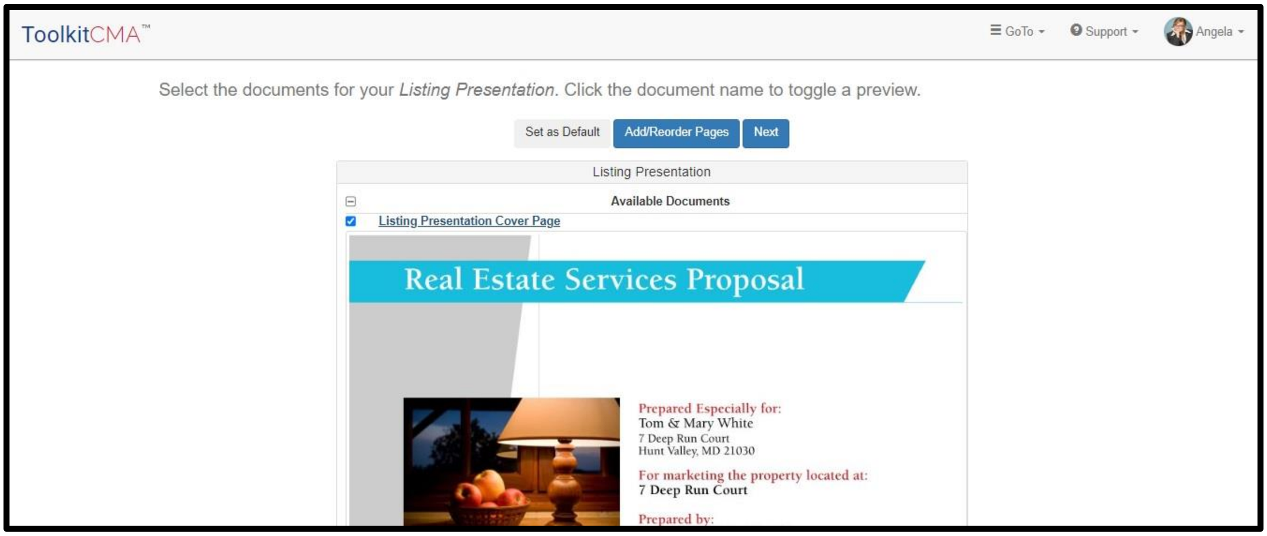
From the **'Home'** screen, click on the **Create Presentation** button. (If you are not already on the **'Home'** screen, you can get there by clicking **"GoTo"** and choose the page link for **Home**.) You will be prompted to select a presentation. Click on the type of presentation you'd like to work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

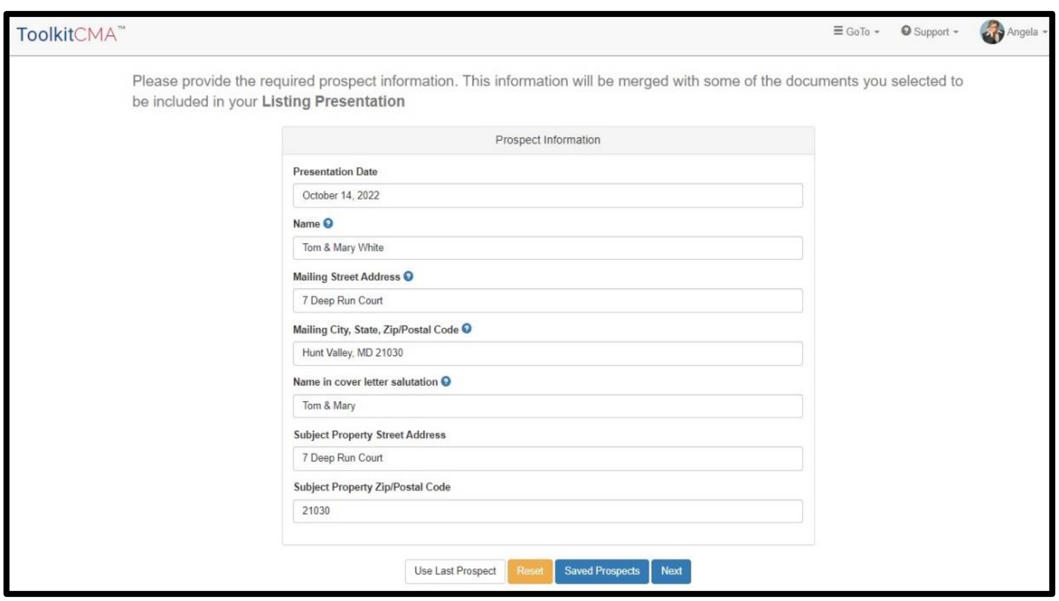


As you are acquainting yourself with ToolkitCMA™, you will find it helpful to look at samples of the presentation pages. To do this, hover your mouse over a page title you are interested in viewing. When the wording is underlined, click on it and a sample of the completed page will appear in a smaller window.



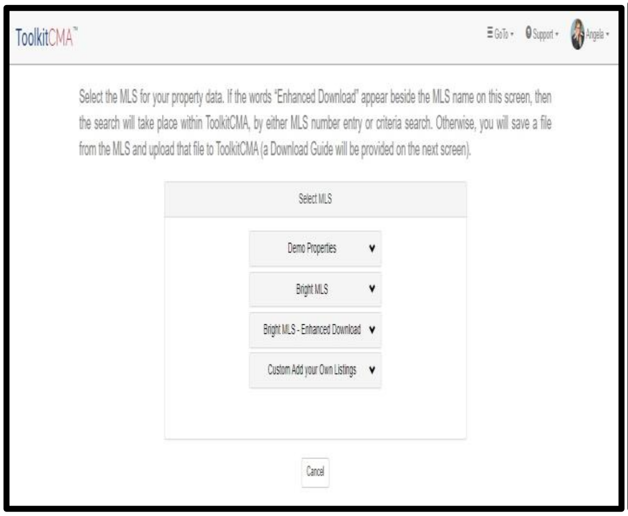

Select or unselect the page based on whether or not you'd like to include it. Repeat these steps for the remaining pages in your document list until you are satisfied with your selection. When you are ready to move forward, click **Next.**

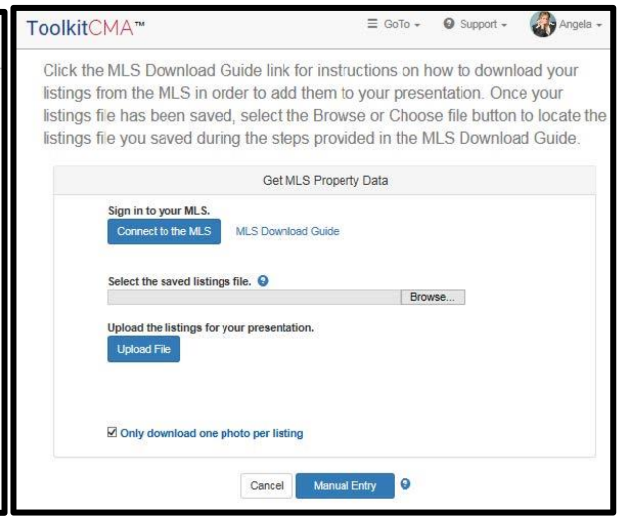
Fill in all the fields on the **'Prospect Information'** screen and press **Next** to advance to the Cover Letter. Make any edits to the Letter that you feel are necessary and then advance by clicking **Next** again.



## Adding MLS Property Data to your Presentation

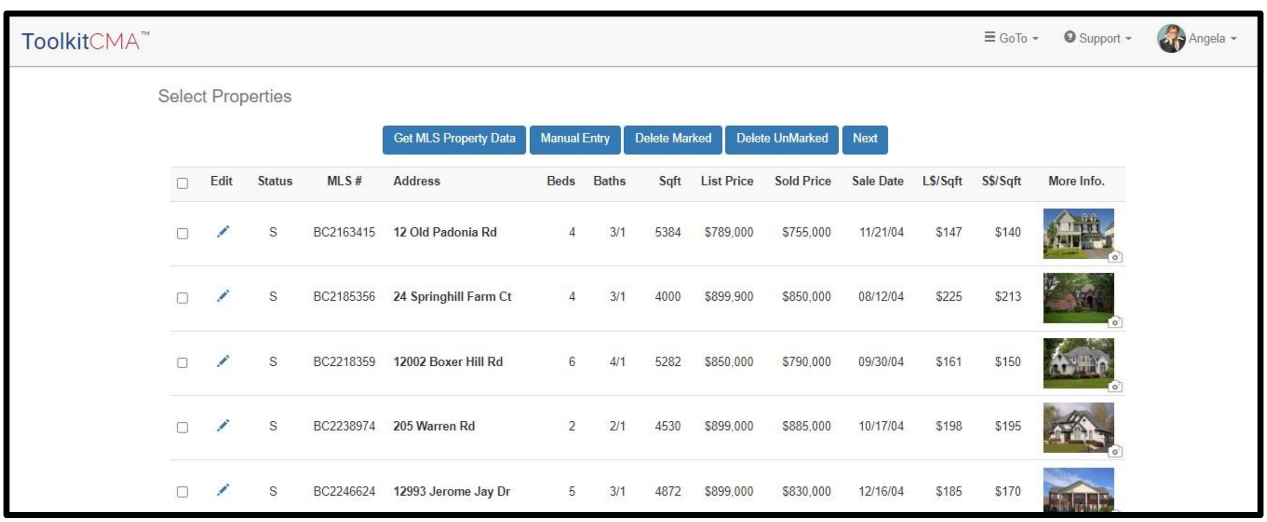
You will now find yourself on a page titled, **"Select MLS"**. Click to select your MLS from the list of boards provided. **Follow on-screen steps**. If prompted to **Connect to the MLS**, click the link beside that button to open and print the **"MLS Download Guide"**. Then connect to your MLS and follow those steps to upload properties to ToolkitCMA™.



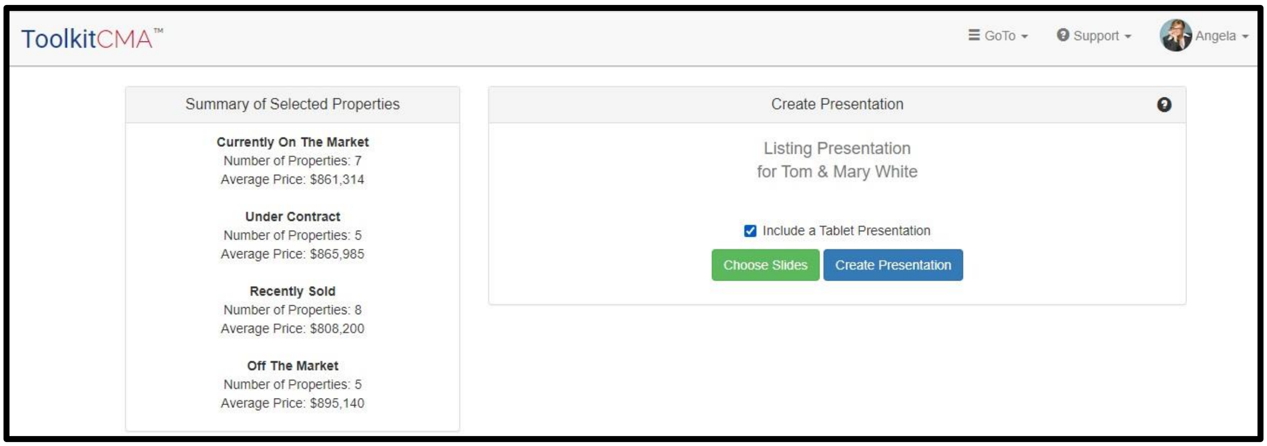

## Select Properties

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.

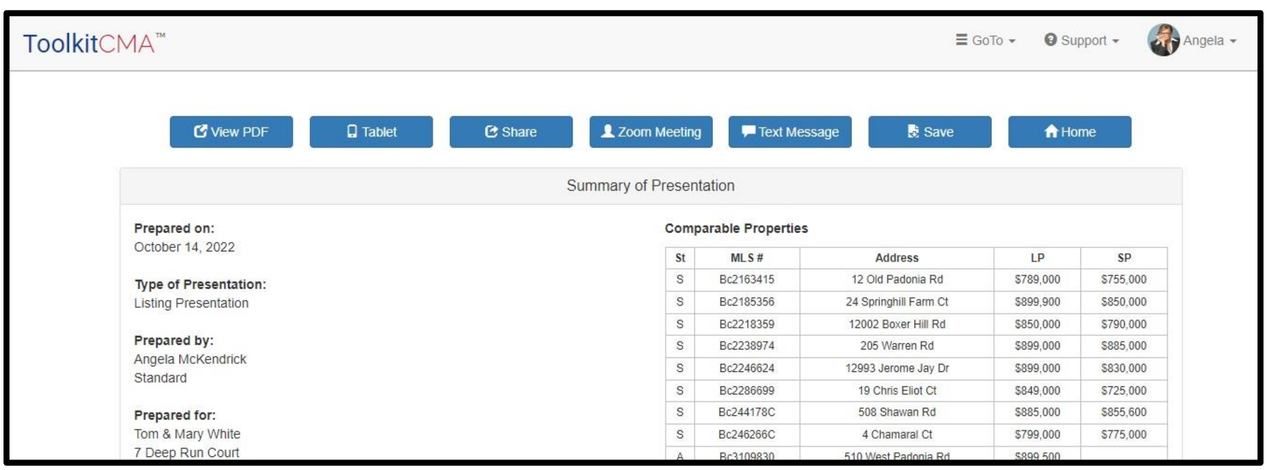


**Creating your Presentation**

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.)




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™ 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.