The Recipe for Going Paperless with Cloud CMA

We all know that Cloud CMA creates great looking presentations and draws upon connectMLS™ and a number of sources in "the Cloud" to create impressive reports for your clients. One of its most helpful features is the ease by which you can electronically deliver CMAs, flyers, property reports or buyer tours to whoever you want.

Here is another really effective way to use Cloud CMA. It's our recipe for making the typical showing of homes to a prospective purchaser into something cutting edge and really cool, while at the same time saving a few trees. All you need is an iPad. All real estate professionals have an iPad, right? ☺

Let's say you are taking out a prospective purchaser to look at some homes this weekend. Before you do anything else, go to your app store and download pdf-notes. Then:

- From connectMLS™, find the properties you want to show.
- In the connectMLS™ 1-Line Summary Report, check mark the properties you've chosen and click on the Cloud CMA icon above the report.
- Choose "Create new Buyer Tour".
- Name the report; the listing numbers will already be auto-filled for you.
- Click "Fetch Listings".
- Review the listings and customize the report with the colors and fonts of your choice.
- Publish the report.
- Once the report is created, click "View"; along the top a message will appear asking to "Open in…" Tap that, and open in pdf-notes.

Meet with your client. Keep the report open on your iPad in pdf-notes. As you proceed through your showings, let your client view the report and add his or her own notes as you go (that's what pdf-notes allows you to do). When done, email the report (with their own notes) to your client!

Look like a real professional who has the cutting edge tools to help your clients make the best buying decisions. This is a recipe for success!