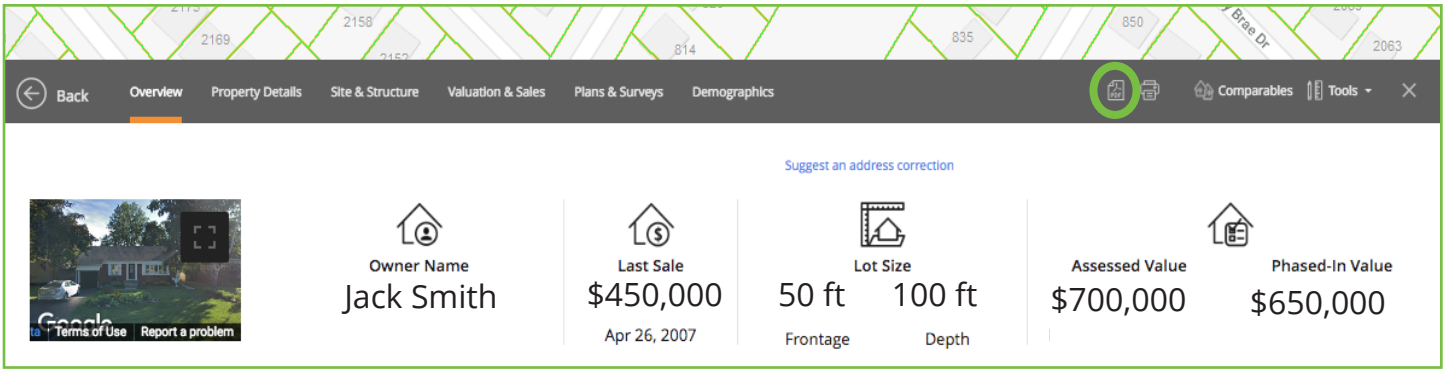
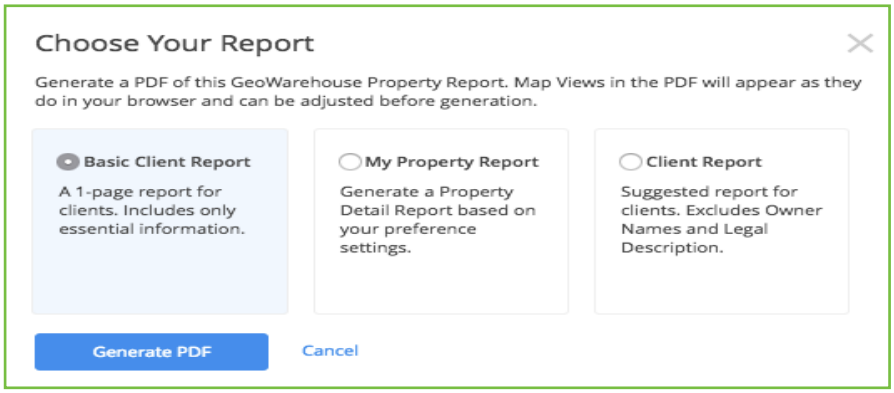
TIPS & TRICKS
HOW TO CREATE A PDF PROPERTY REPORT

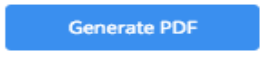
To create a PDF report from the **Property Report,** select the **PDF icon** located in the tool bar on the right side of the window.



There are three options available: **Basic Client Report, My Property Report & Client Report**



I. BASIC CLIENT REPORT

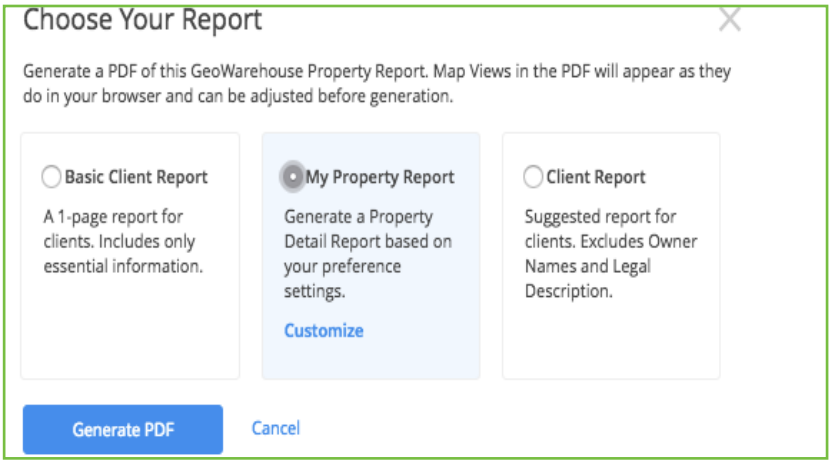
If you select **Basic Client Report** and 

, a report for clients will generate.

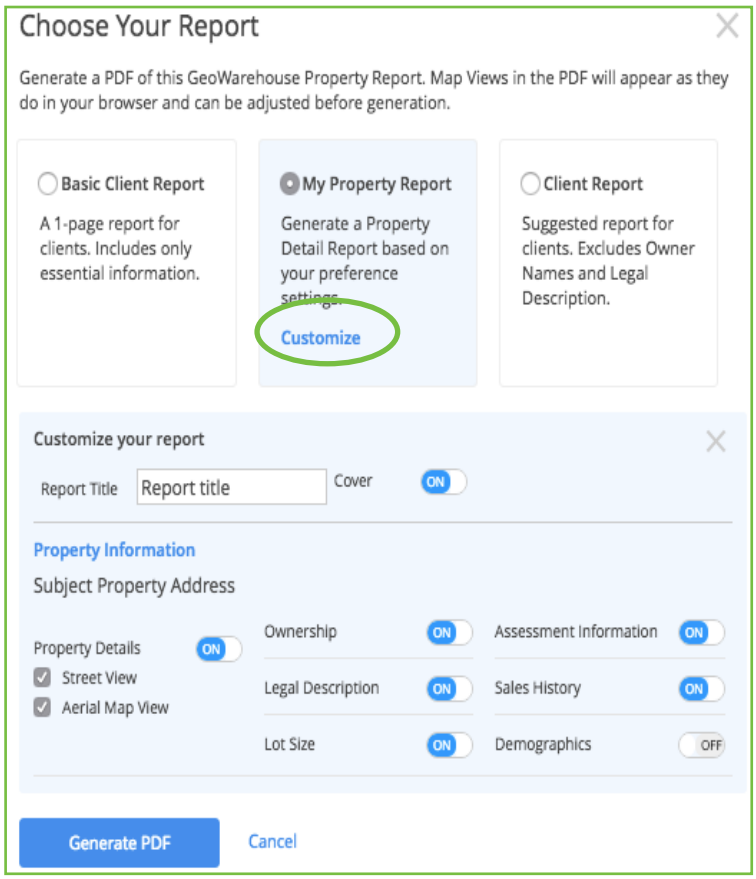
This report includes only essential information such as the Property Details (excluding owner's name), Aerial & Street View imagery, Assessment Information and Sales History.

II. MY PROPERTY REPORT

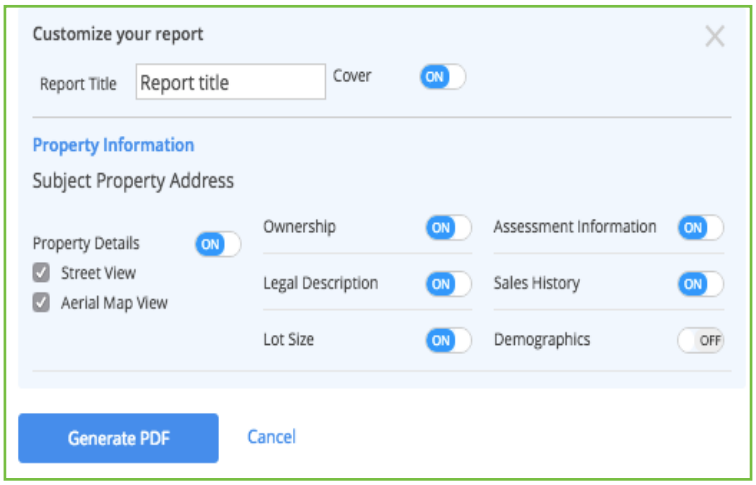
If you select **My Property Report** and Generate PDF , a report will generate based on your Preferences settings located in Account>My Account>Preferences>PDF Property Report.



You can easily adjust the report by selecting Customize and a window will open and display all of the possible data elements in the **My Property Report**.



You may include or exclude Property Information in the report by setting the toggle to ON or OFF.



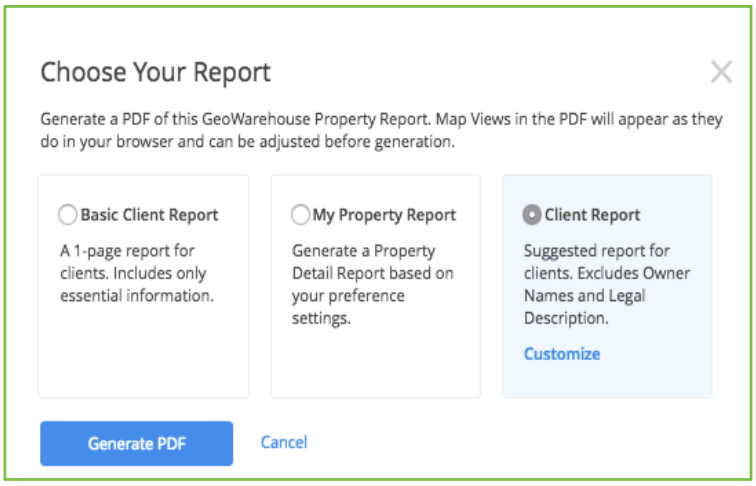
Select Generate PDF and a message will appear indicate that the report is generating.

Once completed, the PDF of the Client Report can be printed or saved.

III. CLIENT REPORT

If you select **Client Report** and Generate PDF , a report will generate with system default settings.

There are three sections in the Client Report: **Property Information, Area Sales Information** and **Market Analytics.**



You can easily adjust the report by selecting **Customize**. A window will open and you may enter a Report Title such as your clients name and turn the Cover ON or OFF as desired.

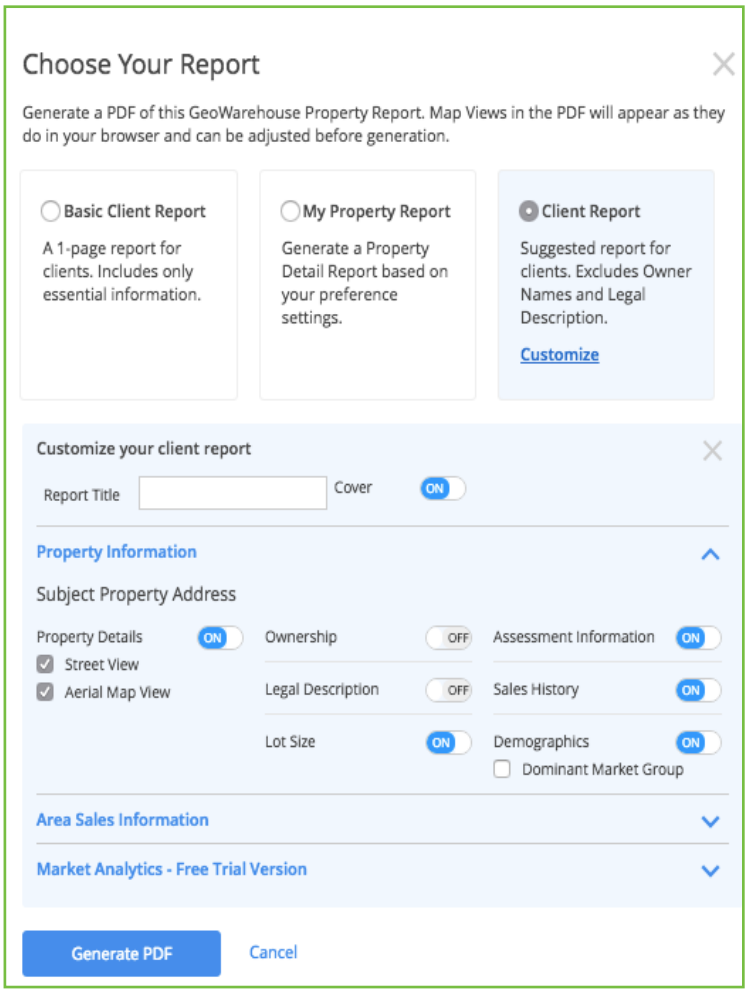
There are three sections in the Client Report that you can customize: **Property Information, Area Sales Information** and **Market Analytics.**

1. Property Information

In this section Ownership, Legal Description and Demographics are set to OFF.

You may include or exclude Property Information in the report by setting the toggle to ON or OFF.

To add/remove any features enabled with a check box, select the box to change the option.

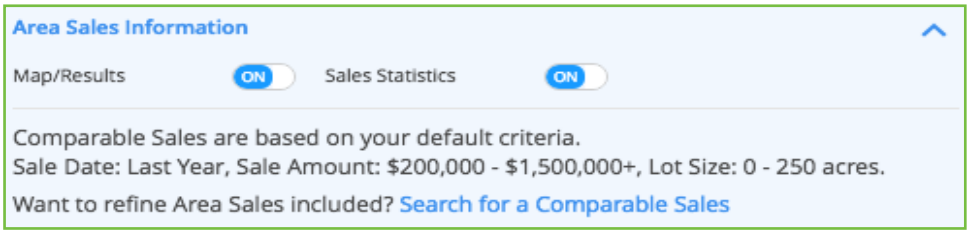


To review the **Area Sales Information** or **Market Analytics** sections select the down arrow to the right.

2. Area Sales Information

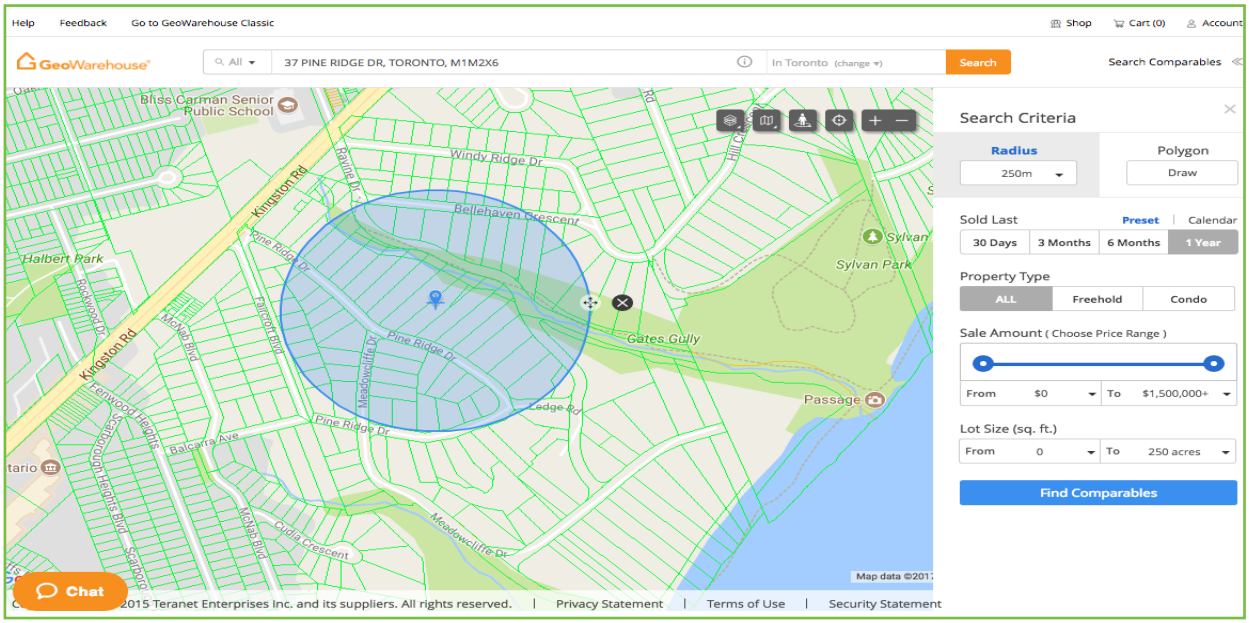
In this section, the default is to include the Map/Results and Sales Statistics. To remove either of these sections select ON to toggle to OFF.

Comparable Sales are based on your default criteria as show in the screen shot below. If you are satisfied with the default criteria, go to the next section.



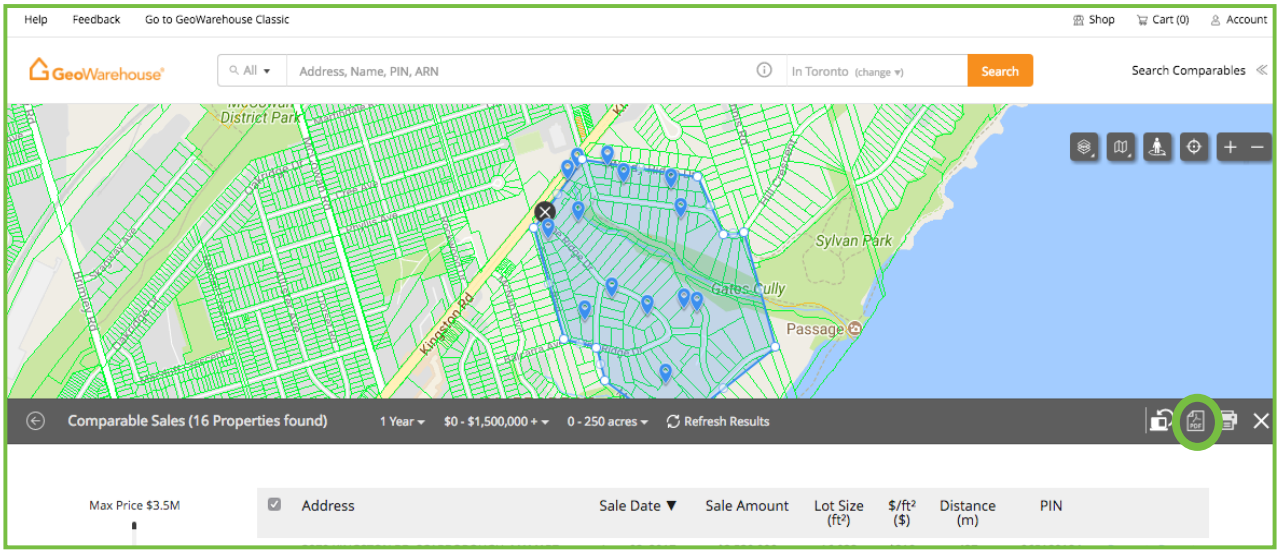
If you would like to refine Area Sales criteria, select **Search for a Comparable Sales.**

You will be directed to Search Comparables section where you can choose the search criteria.

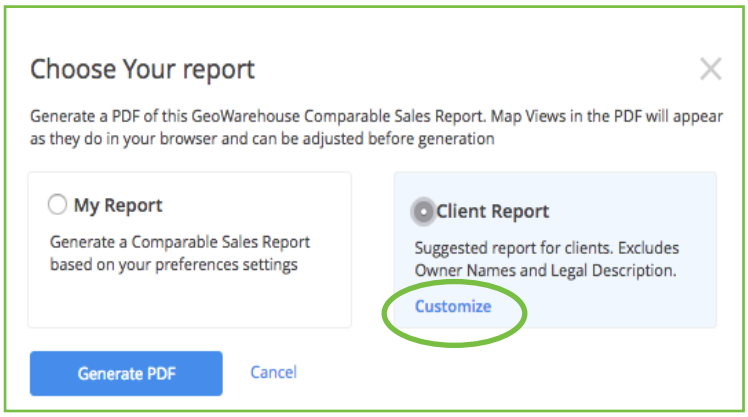


Click HERE for instructions on how to **Search for Comparable Sales.**

Once you have identified the Comparable Sales, select the PDF icon located in the Comparable Sales tool bar on the right side of the window.



Select **Client Report** and then Customize to continue adjusting the report.



3. Market Analytics - Free Trial Version

In this section, you will find insight into Residential properties from authoritative data from Land Registry:

Historical Market Trend:

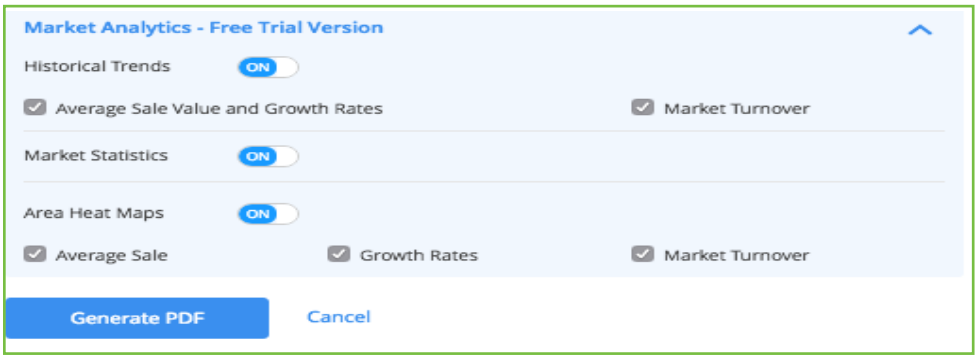
- Average Sale Values, Growth and Market Turnover Rates for the last 8 years

Market Statistics:

- Average Sales Price for the last year
- Growth Rate for the last 5 years
- Market Turnover for the last year
- 5 Year Analysis

Area Heat Map:

- Average Sales Heat Maps for the last year
- Growth Rate Heat Maps for the last 5 years
- Market Turnover Heat Maps for the last year



You may include or exclude Market Analytics in the report by setting the toggle to ON or OFF.

To add/remove any features enabled with a check box, select the box to change the option.

Select Generate PDF and a message will appear indicate that the report is generating.

MORE ON MARKET ANALYTICS

When will the free trial end for the Market Analytics?

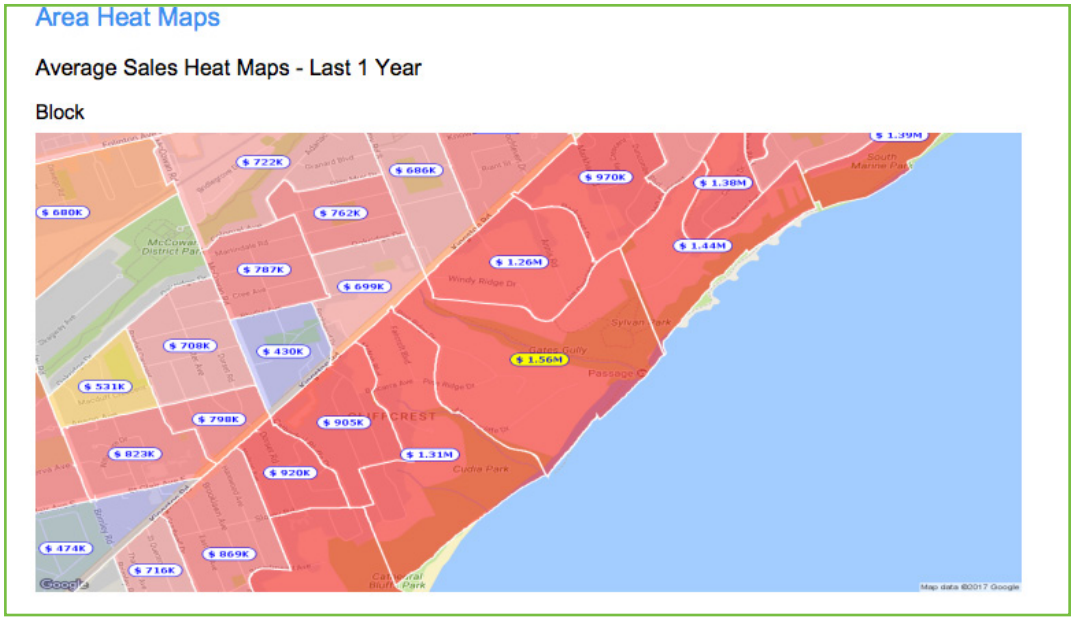
At this time, we do not have a specific date for when the trial will end but be assured we will let you know in advance of the change.

What are Area Heat Maps?

Area Heat Maps are divided using small geographic areas from Land Registry Block mapping. The Block is the first 5 digits of the unique 9-digit PIN assigned to each automated parcel in Ontario's Land Registry. A Block will typically reflect a local neighbourhood and is separated by major street and railways. The number of individual parcels in a block can vary.

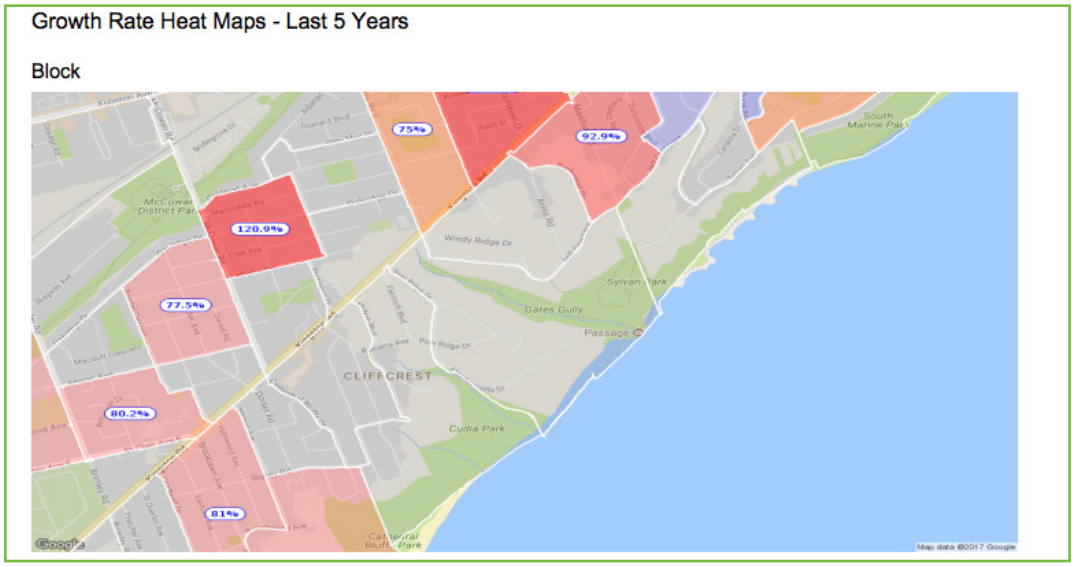
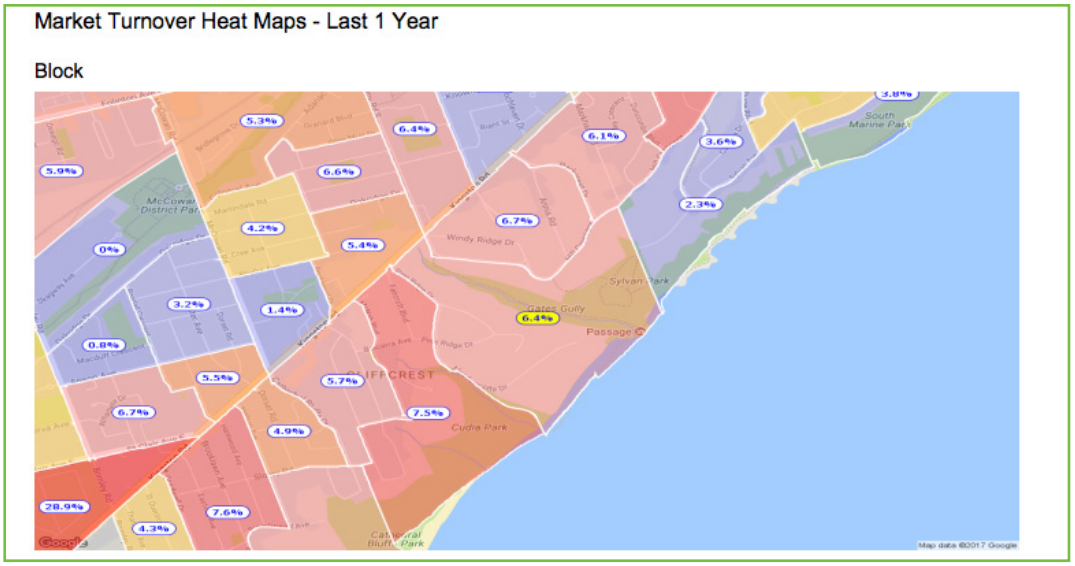
Each block in the map is colour coded based on the results in the area. The colour range goes from red (highest) to blue (lowest) and the amount or percentage will display in an ellipse in the centre of the block (where available).

Average Sales are based on residential sales only. Nominal consideration, non-arms-length, commercial & industrial sales are not included, as they would skew residential calculations.



Growth Rate represents the growth in average price for the local neighbourhood block in 5 years. It is calculated using the average sale amount for the last year minus the average sales amount from 5 years ago divided by the average amount for the last year.

The Area Heat Maps for Growth Rate uses a conservative approach and requires a minimum number of residential transactions to calculate a valid result. If the minimum number of transactions in each period is not met, the map will not show a result for growth.



Market Turnover is the number of sales divided by the number of properties for the last year.