

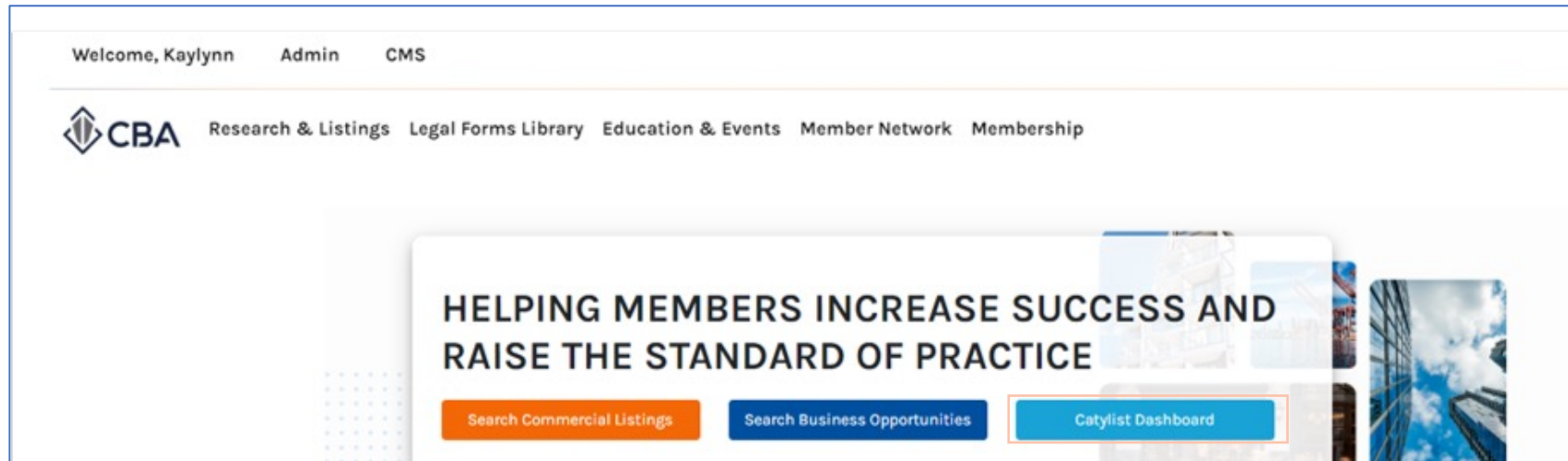


ADMIN DASHBOARD

In this guide, we will be reviewing the dashboard tools available to our admin users.

THE ADMIN DASHBOARD

Accessing your dashboard



To access the listings platform you will want to click on "Catylist Dashboard" on the CBA homepage once you have logged into your CBA account.



THE ADMIN DASHBOARD

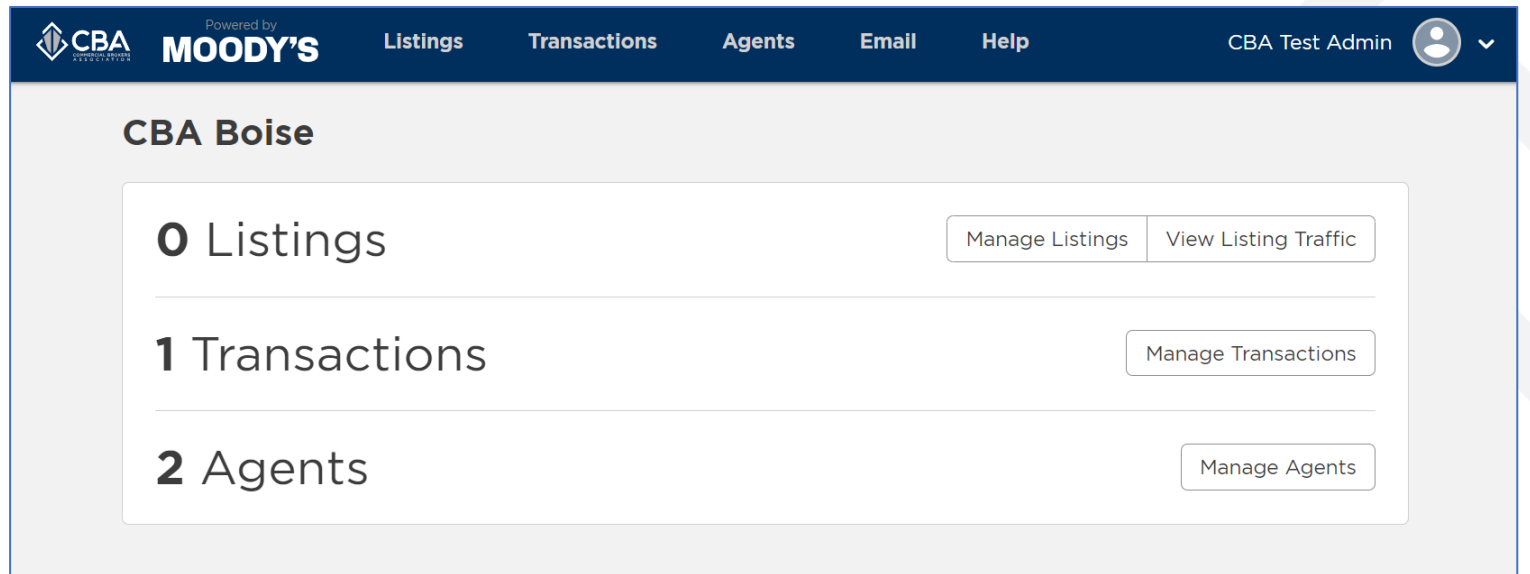
Getting familiar with your dashboard

After you have followed the steps to access your dashboard this is what your screen will look like. The dashboard is separated into three sections:

Listings view and manage your office's active and off-market listings.

Transactions view and manage your office's sold or leased listings.

Agents access the agents in your office to log in as the user and perform a search, open listing links, manage that agent's listings, or make an edit to their public profile.



The screenshot shows the admin dashboard for CBA Boise, powered by Moody's. The dashboard is divided into three main sections: Listings, Transactions, and Agents. Each section displays a count and a management button. The Listings section shows 0 listings with buttons for 'Manage Listings' and 'View Listing Traffic'. The Transactions section shows 1 transaction with a 'Manage Transactions' button. The Agents section shows 2 agents with a 'Manage Agents' button. The top navigation bar includes the CBA logo, 'Powered by MOODY'S', and menu items for Listings, Transactions, Agents, Email, and Help. The user is identified as 'CBA Test Admin' with a profile icon and a dropdown arrow.

Section	Count	Management Buttons
Listings	0	Manage Listings, View Listing Traffic
Transactions	1	Manage Transactions
Agents	2	Manage Agents

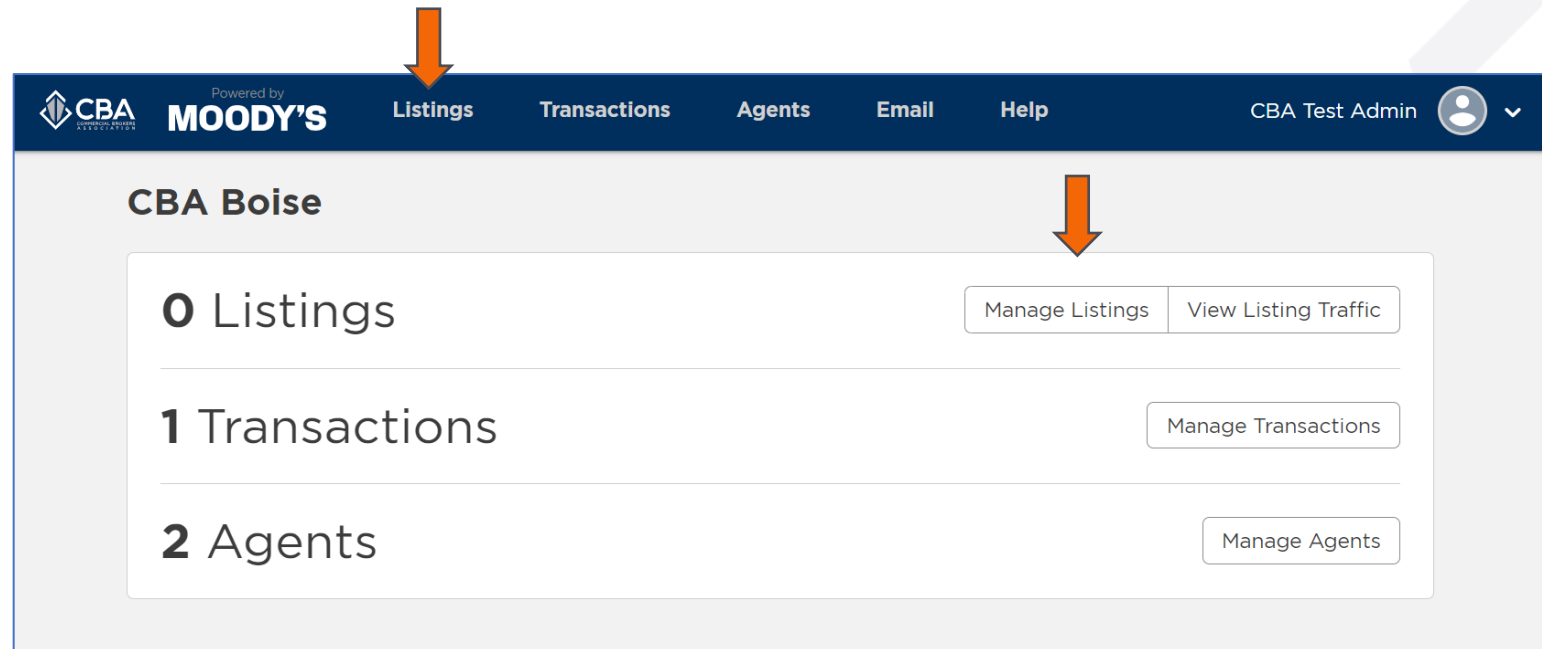


MANAGE LISTINGS

Accessing your office listings

You can access your office's active and off-market listings by selecting "**Listings**" on the toolbar.

You can also access them by selecting "**Manage Listings**" in the listings section of your dashboard.



The screenshot shows the CBA Boise dashboard interface. At the top, there is a dark blue navigation bar with the CBA Association logo, the text "Powered by MOODY'S", and menu items for "Listings", "Transactions", "Agents", "Email", and "Help". On the right side of the navigation bar, it says "CBA Test Admin" next to a user profile icon. Below the navigation bar, the main content area is titled "CBA Boise". It features three summary cards: "0 Listings" with buttons for "Manage Listings" and "View Listing Traffic"; "1 Transactions" with a "Manage Transactions" button; and "2 Agents" with a "Manage Agents" button. An orange arrow points to the "Listings" menu item in the navigation bar, and another orange arrow points to the "Manage Listings" button in the "0 Listings" card.



MANAGE LISTINGS

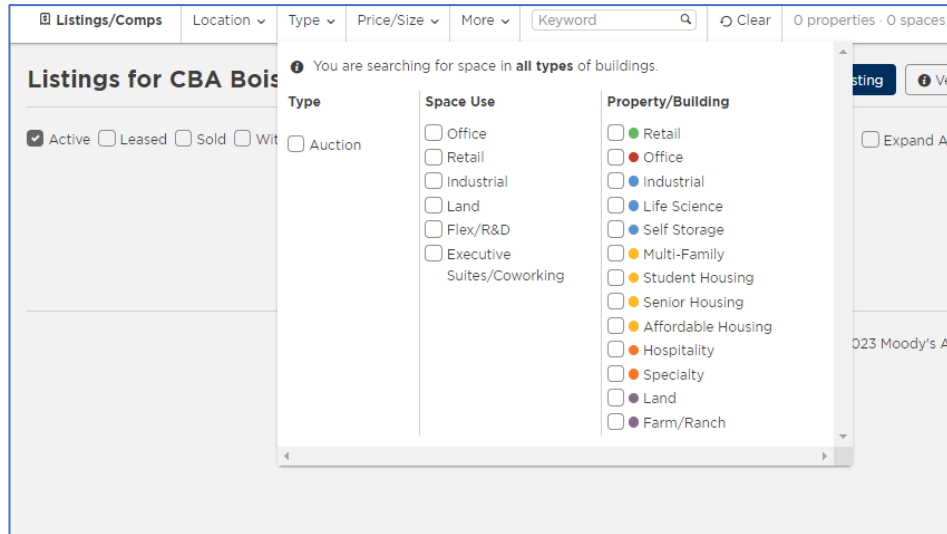
Navigating the Manage Listings page

The screenshot shows the 'Manage Listings' interface for 'CBA Boise'. At the top, there is a navigation bar with filters for 'Listings/Comps', 'Location', 'Type', 'Price/Size', and 'More'. A search bar contains the text 'Keyword' and a 'Clear' button. To the right, it shows '0 properties · 0 spaces'. An orange arrow points to this search area with the text 'Apply filters to search for specific listings'. Below the navigation bar, the page title is 'Listings for CBA Boise'. To the right of the title are buttons for '+ Add a Listing', 'Verify Listings', 'Export Listings', and 'View Traffic'. Below the title is a status filter bar with radio buttons for 'Active' (checked), 'Leased', 'Sold', 'Withdrawn', 'Expired', and 'Hold'. An orange arrow points to this bar with the text 'Toggle between your office listings based on listing status'. To the right of the status filter is an 'Expand All' button and a 'Filter by Agent' button. Below the status filter, the text 'No results!' is displayed, followed by the instruction 'Try changing your filters to be more general'. An orange arrow points to the '+ Add a Listing' button with the text 'Add a new listing'. To the right of the 'No results!' text is a 'Sorting by Modified Date' dropdown menu. An orange arrow points to this menu with the text 'Choose how you'd like to sort your office listings'. At the bottom of the page, there are links for 'Terms of Use', 'Privacy Policy', and 'Do Not Sell My Personal Information', along with a copyright notice '©2023 Moody's Analytics, Inc.'. An orange arrow points to the bottom of the page with the text 'Manage the listings of a specific agent'.

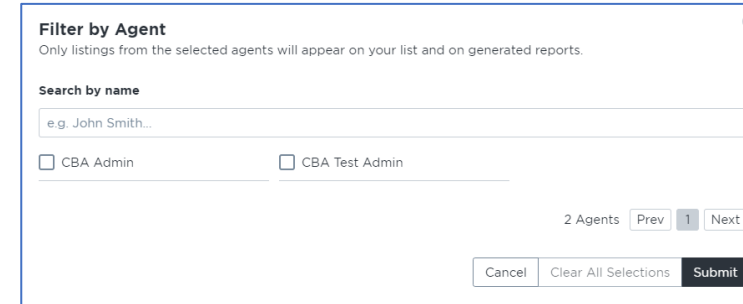


MANAGE LISTINGS

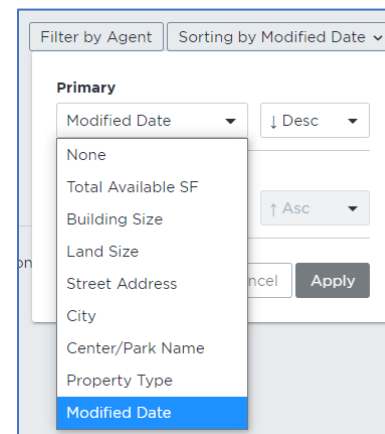
Quick tips to help with managing your office listings



You can apply filters at the top of the Manage Listings page to make locating a specific listing easier than ever!



If you would like to view the listings of a specific agent, you can do so with the Filter by Agent search filter.



Use different methods to sort your office's listings to make the listing management process even easier for you!

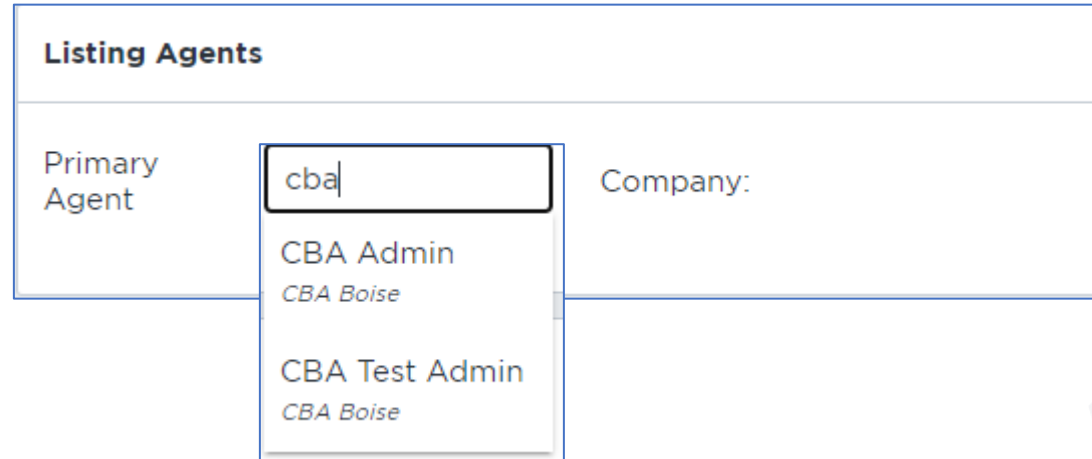


MANAGE LISTINGS

Quick tip for adding a listing

As an admin user, you can input listings for agents while logged in to your own account. Once you get to the end of the listing input screen you will simply type in the primary listing agent's name. Once you find the appropriate agent after you have begun typing, click on their name and the system will add the broker as the listing agent and the listing will then appear in the broker's my listing page once you submit the listing!

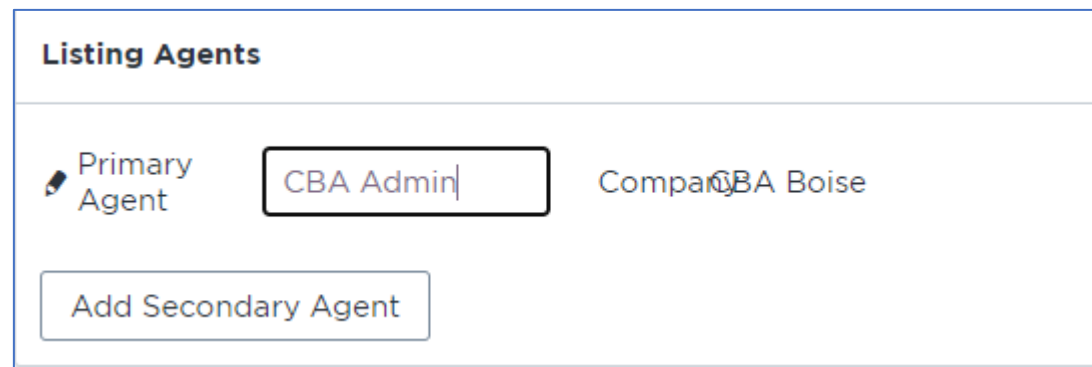
If you need to add more than one agent, click "Add Secondary Agent" and repeat the process above as many times as you need to add all of the appropriate listing agents!




Listing Agents

Primary Agent Company:

- CBA Admin
CBA Boise
- CBA Test Admin
CBA Boise



Listing Agents

 Primary Agent Company: CBA Boise



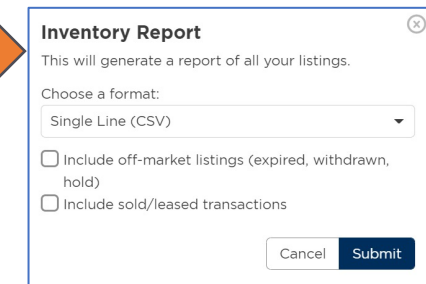
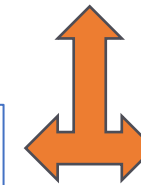
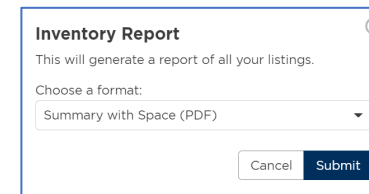
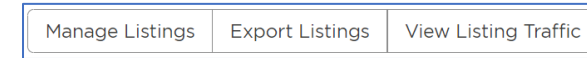
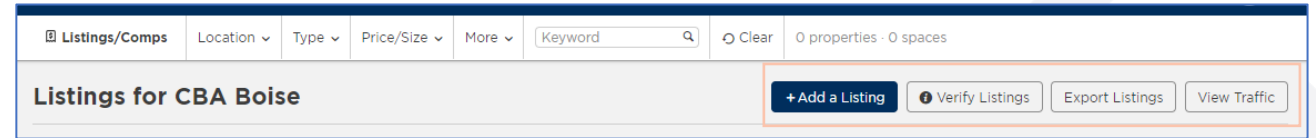
MANAGE LISTINGS

Pulling office inventory reports

You can pull an office inventory report by selecting **“Export Listings”** on the Listings page.

Once you have selected this a pop-up window will appear allowing you to select between a Summary with Space (PDF) inventory report or a Single Line (CSV) report.

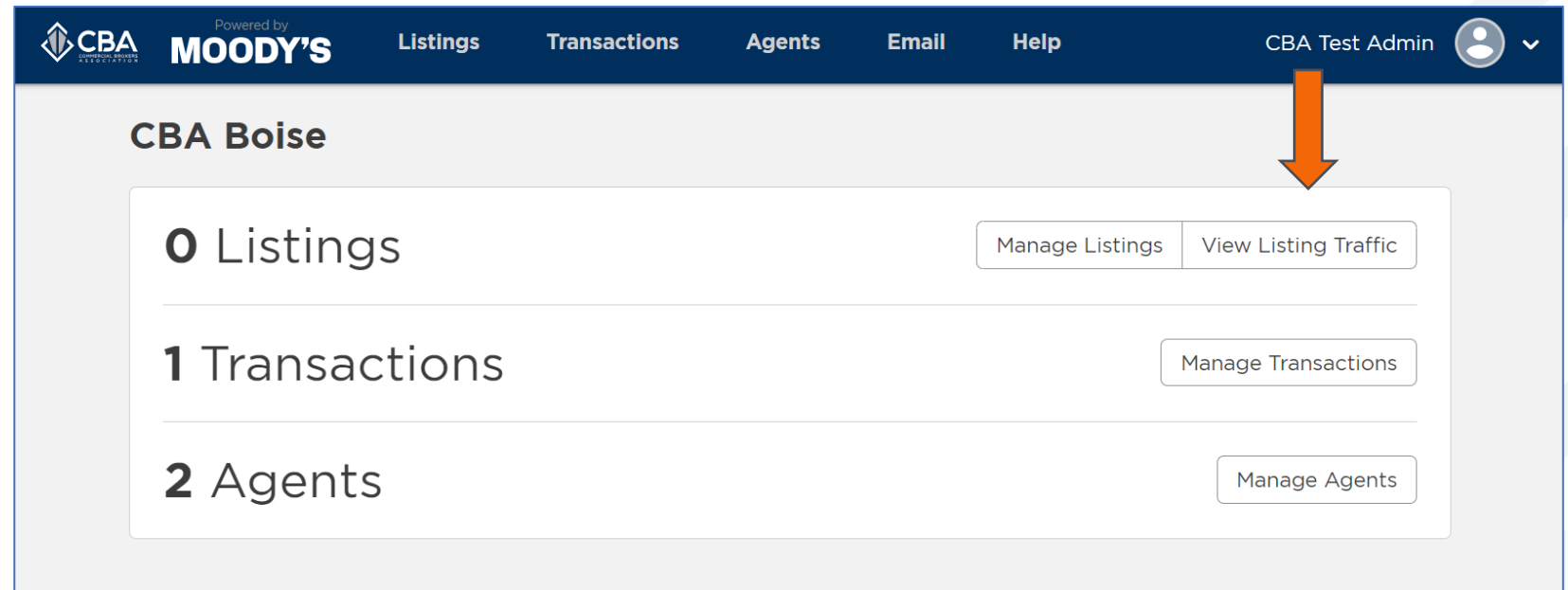
If you would like to include your off-market listings in your inventory report you will want to select the Single Line (CSV) report and select the off-market listing types you would like to include.



VIEW LISTING TRAFFIC

Accessing traffic count reports for your office listings

To review the traffic reports on your office listings you can select “View Listing Traffic” on the listing section of your dashboard.

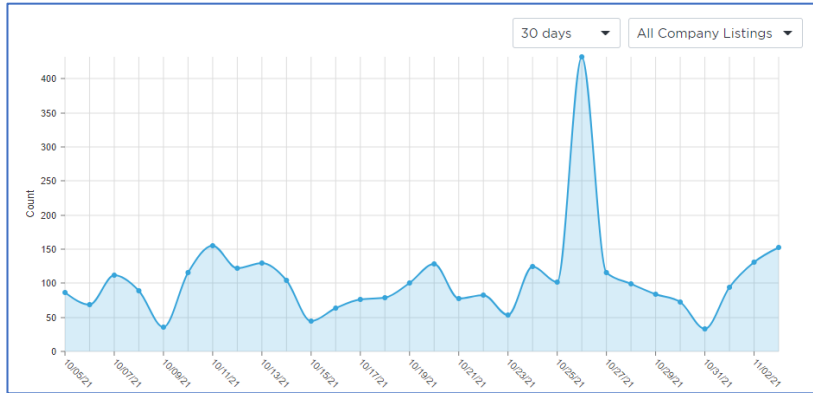


The screenshot displays the CBA Boise dashboard interface. At the top, there is a dark blue navigation bar with the CBA logo, the text "Powered by MOODY'S", and menu items for "Listings", "Transactions", "Agents", "Email", and "Help". On the right side of the navigation bar, it shows the user "CBA Test Admin" with a profile icon and a dropdown arrow. Below the navigation bar, the main content area is titled "CBA Boise". It features three summary cards: "0 Listings" with buttons for "Manage Listings" and "View Listing Traffic"; "1 Transactions" with a "Manage Transactions" button; and "2 Agents" with a "Manage Agents" button. A large orange arrow points from the "View Listing Traffic" button in the "0 Listings" card towards the top right of the dashboard.



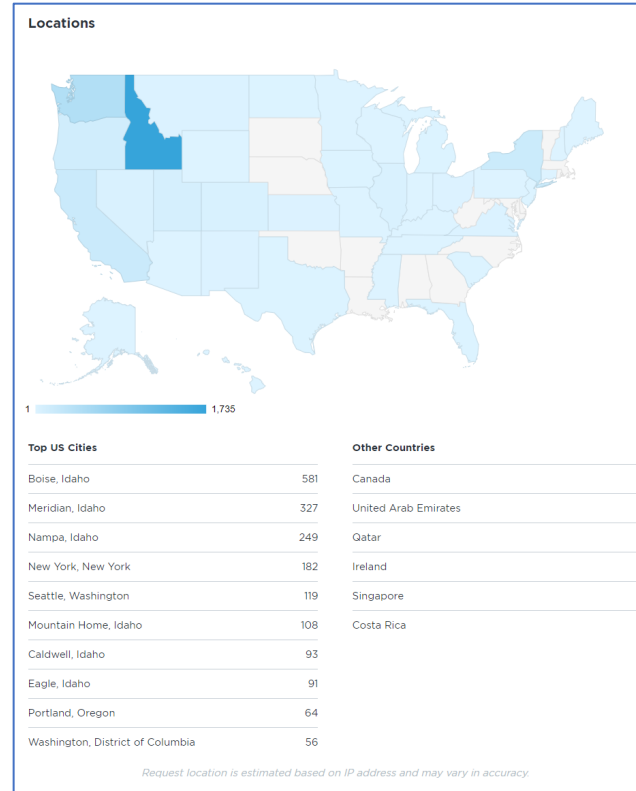
LISTING TRAFFIC

The different types of traffic reports



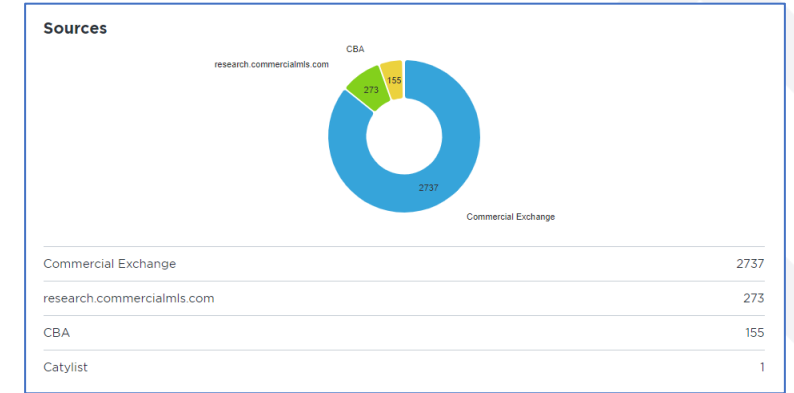
Views:

The views traffic report shows the total number of views on your listings.



Locations:

The locations traffic report shows the general location of those who have viewed your listings.



Sources:

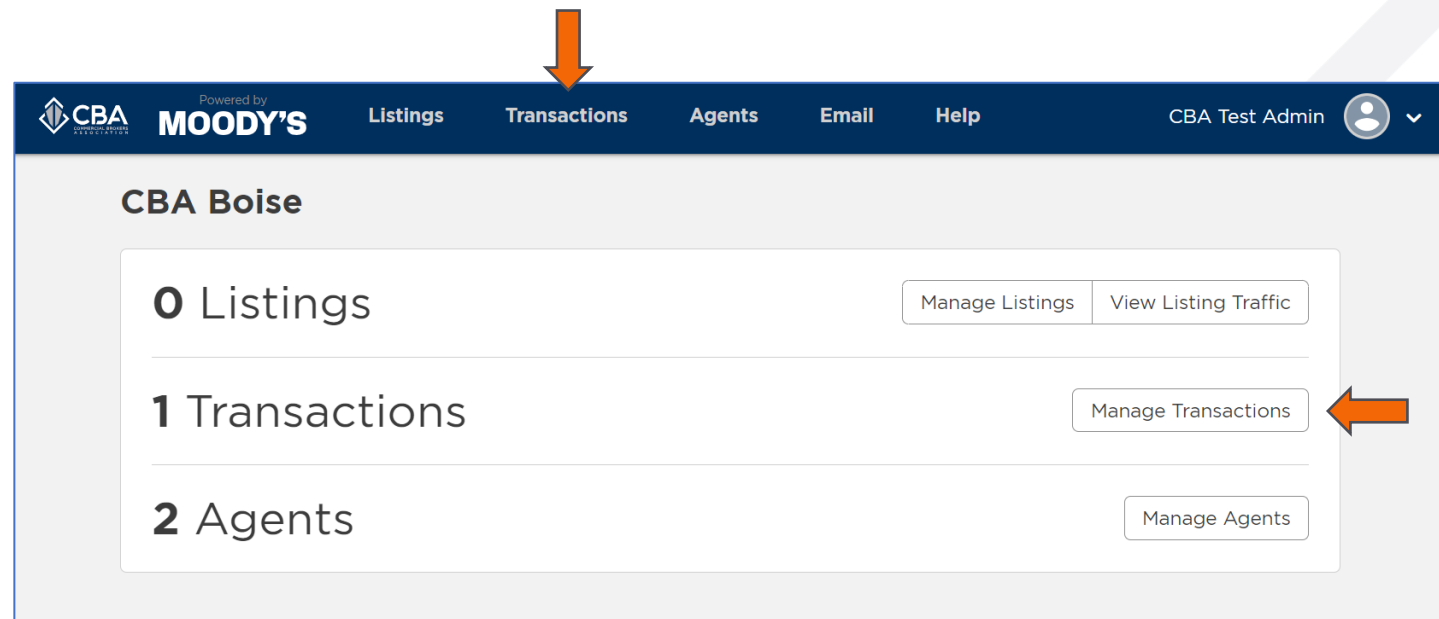
The sources traffic report shows which website your listings have been viewed on.



MANAGE TRANSACTIONS

Accessing your offices sold and leased listings

You can quickly access the listings in your office that have been sold or leased by selecting **“Transactions”** on the toolbar or **“Manage Transactions”** in the transactions section of your dashboard.



The screenshot shows a web dashboard for 'CBA Boise'. At the top, there is a dark blue navigation bar with the CBA logo, 'Powered by MOODY'S', and menu items: Listings, Transactions, Agents, Email, and Help. An orange arrow points to the 'Transactions' menu item. On the right of the navigation bar, it says 'CBA Test Admin' with a user profile icon and a dropdown arrow. Below the navigation bar, the main content area is titled 'CBA Boise'. It contains three summary cards: '0 Listings' with buttons for 'Manage Listings' and 'View Listing Traffic'; '1 Transactions' with a 'Manage Transactions' button (highlighted by an orange arrow); and '2 Agents' with a 'Manage Agents' button.



MANAGE TRANSACTIONS

Navigating the manage transactions page

The screenshot shows the 'Manage Transactions' interface. At the top, there is a navigation bar with filters for 'Listings/Comps', 'Location', 'Type', 'Price/Size', and 'More'. A search bar contains 'Keyword' and a 'Clear' button. The current filter count is '1 property - 1 space'. An orange arrow points to this area with the text 'Apply filters to search for specific listings'.

Below the navigation bar, the main heading is 'Transactions for CBA Boise'. To the right of this heading are buttons for '+ Add a Listing', 'Verify Listings', 'Export Listings', and 'View Traffic'. An orange arrow points to the '+ Add a Listing' button with a callout box containing the text: 'Add a leased or sold property that was not listed previously in CBA*.'

Under the heading, there are filter options: 'Active', 'Leased' (checked), 'Sold' (checked), 'Withdrawn', 'Expired', and 'Hold'. To the right of these are 'Expand All', 'Filter by Agent', and 'Sorting by Modified Date'. An orange arrow points to the 'Filter by Agent' button with a callout box: 'Filter transactions by agent'. Another orange arrow points to the 'Sorting by Modified Date' dropdown with a callout box: 'Sort your office transactions'.

Below the filters, a single transaction is listed: 'Banner Bank Building' at '950 W Bannock St'. It is categorized as 'Office General Existing Bldg status'. The listing includes details for '0 SF', '182,9', and '0.41 A'. To the right of the listing is a 'Show 1 Transaction' dropdown menu.

At the bottom of the page, there are links for 'Terms of Use', 'Privacy Policy', and 'Do Not Sell My Personal Information', along with the copyright notice '©2023 Moody's Analytics, Inc.'

*A property can only be entered as a transaction if it was not originally listed in CBA and has already been sold or leased

**Any properties that you enter as a transaction are private and viewable to your office only



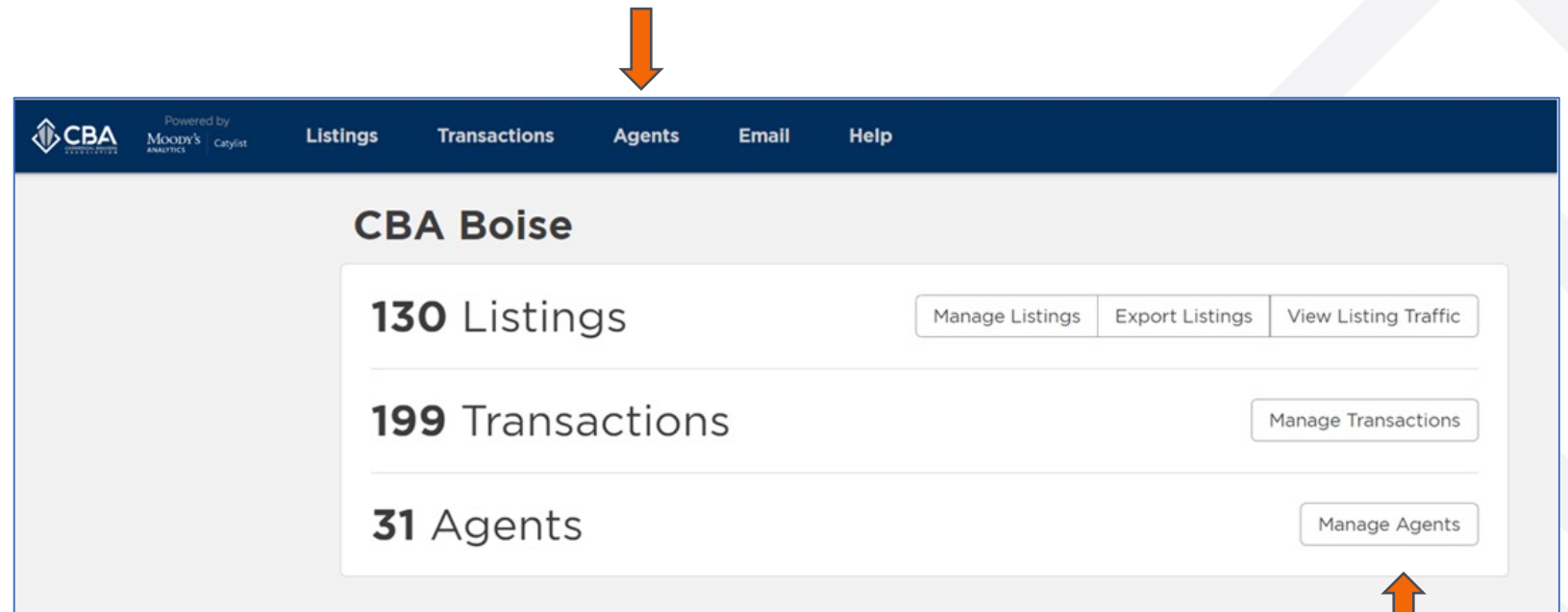
MANAGE AGENTS

Accessing your office roster

You can access your office roster via the “Agents” button on the toolbar or by selecting “Manage Agents” on the agents section of your dashboard.

You will do this to make changes to the agent’s public profile or log in as the agent and perform a search* for them.

*If you have a listing link from another company you need to open you will also want to login as an agent in order to view the listing.



The screenshot shows the CBA Boise dashboard interface. At the top, there is a navigation bar with the CBA logo, the text "Powered by MOODY'S ANALYTICS Catalyst", and menu items: Listings, Transactions, Agents, Email, and Help. An orange arrow points down to the "Agents" menu item. Below the navigation bar, the dashboard displays "CBA Boise" and three summary cards: "130 Listings" with buttons for "Manage Listings", "Export Listings", and "View Listing Traffic"; "199 Transactions" with a "Manage Transactions" button; and "31 Agents" with a "Manage Agents" button. A second orange arrow points up to the "Manage Agents" button.



MANAGE AGENTS

Accessing and managing agent profiles

Agent Name

Office Name

Manage the agent's listings

Log in as the agent to perform a search

Submit an official request to make a change to the agent's public profile information.

The screenshot displays a web interface for managing agents. At the top, there are two navigation tabs: '2 Results' and 'Prev 1 Next'. Below this, a table lists two agents:

Agent Name	Office Name	Actions
CBA Admin	CBA Boise	Manage Listings Edit Profile Log In As
CBA Test Admin	CBA Boise	Manage Listings Edit Profile Log In As

Below the table, there is another '2 Results' navigation tab. An orange arrow points from the 'Office Name' label to the 'CBA Boise' entries in the table. Another orange arrow points from the 'Manage the agent's listings' label to the 'Manage Listings' button in the table. A third orange arrow points from the 'Log in as the agent to perform a search' label to the 'Log In As' button. A fourth orange arrow points from the 'Edit Profile' button to a modal window titled 'Edit Public Profile for CBA Admin'. The modal contains the following fields:

- Profile Photo: Upload button
- Full Name: CBA Admin
- Email: cbaadmin@commercialmls.com
- Mobile Phone: (555) 123-4567
- Business Phone: (555) 123-4567
- Company: CBA Boise
- Company Role: Select a role...
- Professional Overview / Biography: Text area

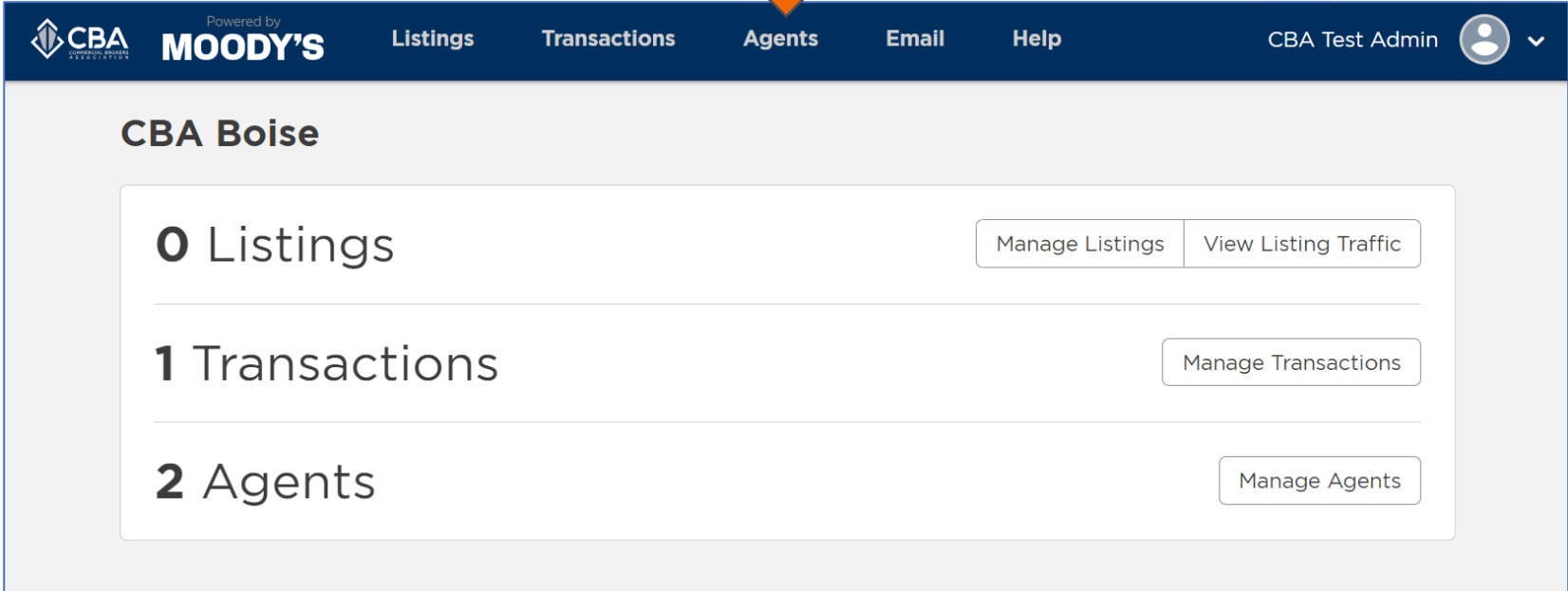
At the bottom of the modal are 'Cancel' and 'Request Changes' buttons.



ADMIN E-MAIL

Accessing the e-mail dashboard

To set up your broadcast e-mail preferences or to send out broadcast e-mails for your office listings you will want to select “Email” on the toolbar.



The screenshot shows a web dashboard for CBA Boise. The top navigation bar is dark blue with the CBA logo and 'MOODY'S' branding. Navigation tabs include 'Listings', 'Transactions', 'Agents', 'Email', and 'Help'. An orange arrow points to the 'Email' tab. The user is logged in as 'CBA Test Admin'. The main content area displays a summary of office statistics:

Category	Count	Action
Listings	0	Manage Listings, View Listing Traffic
Transactions	1	Manage Transactions
Agents	2	Manage Agents



ADMIN E-MAIL

Understanding the e-mail dashboard

The screenshot shows the Admin E-mail dashboard interface. At the top left is a 'Preferences' button with a gear icon. To its right are two buttons: 'New Need/Want' and 'New Listing Broadcast', both with envelope icons. Below these is a 'Sent History' section containing a table with columns for Date, Status, Type, Subject, Recipients, and Opens. The table is currently empty, displaying the message 'You haven't sent any emails yet.' Three orange arrows point to specific features: one to the Preferences button, one to the New Need/Want button, and one to the right side of the Sent History table.

Adjust your e-mail preferences

Send a want or need e-mail request out to the membership.

Send out a broadcast e-mail alert to the membership.

View the details on your sent broadcast e-mails

Date	Status	Type	Subject	Recipients	Opens
You haven't sent any emails yet.					