COMMERCIAL BROKERS ASSOCIATION

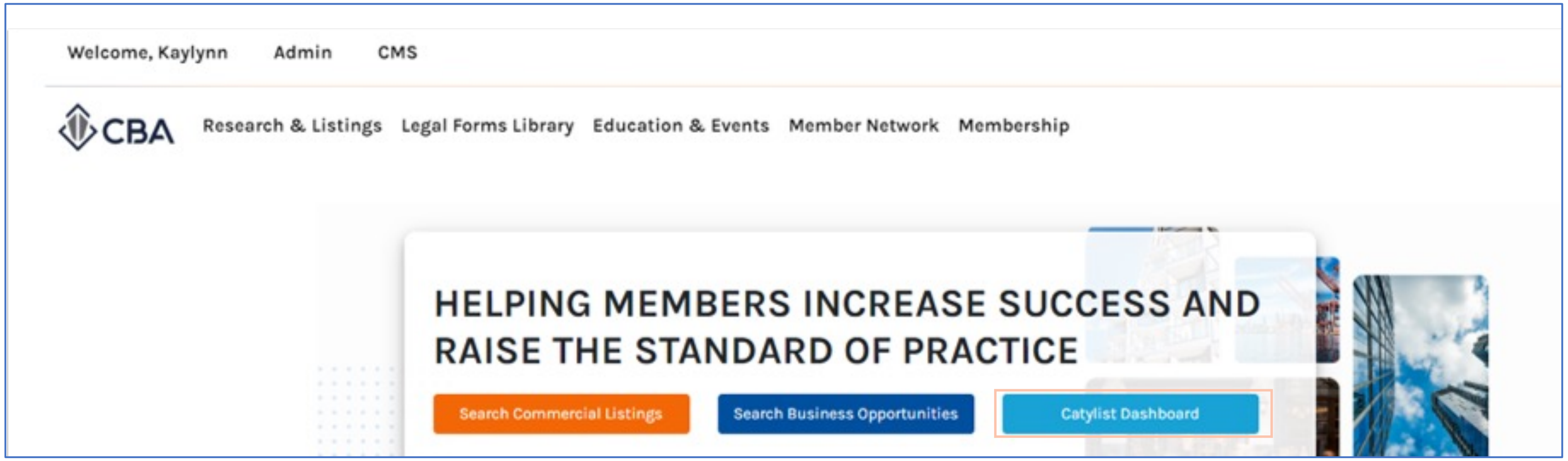
ADMIN DASHBOARD

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

Rev. Date: April 2024

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

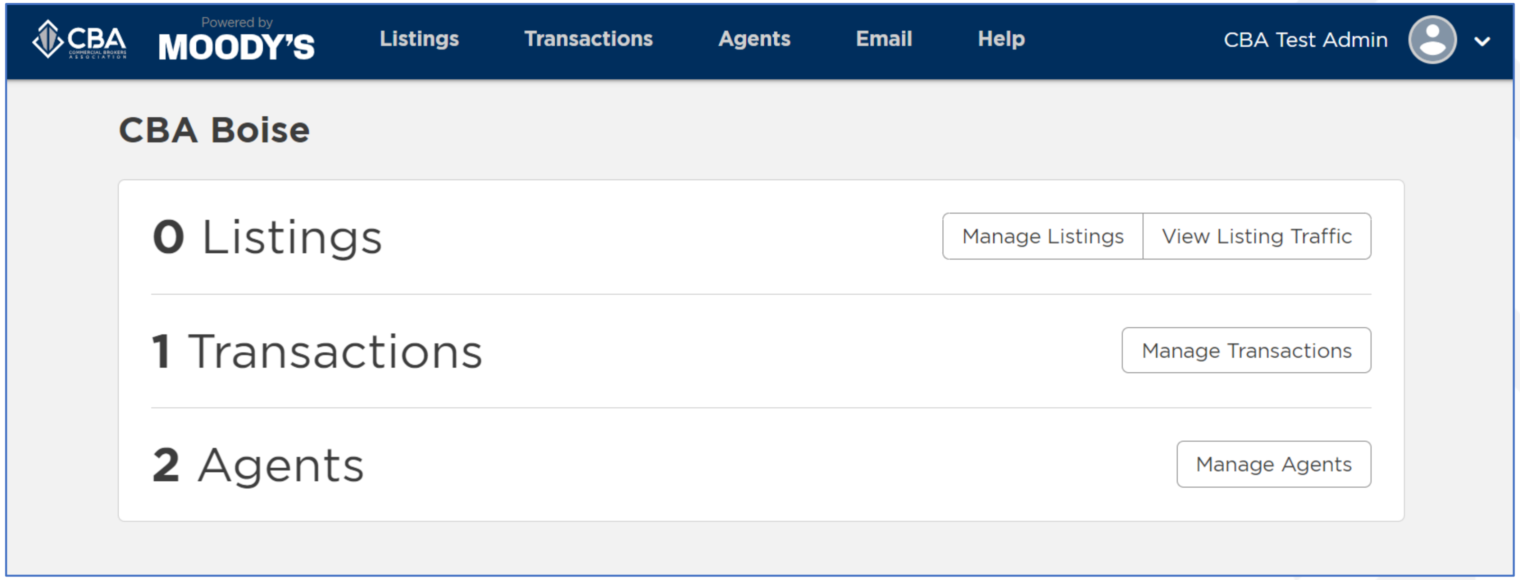
Getting familiar with your dashboard

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.

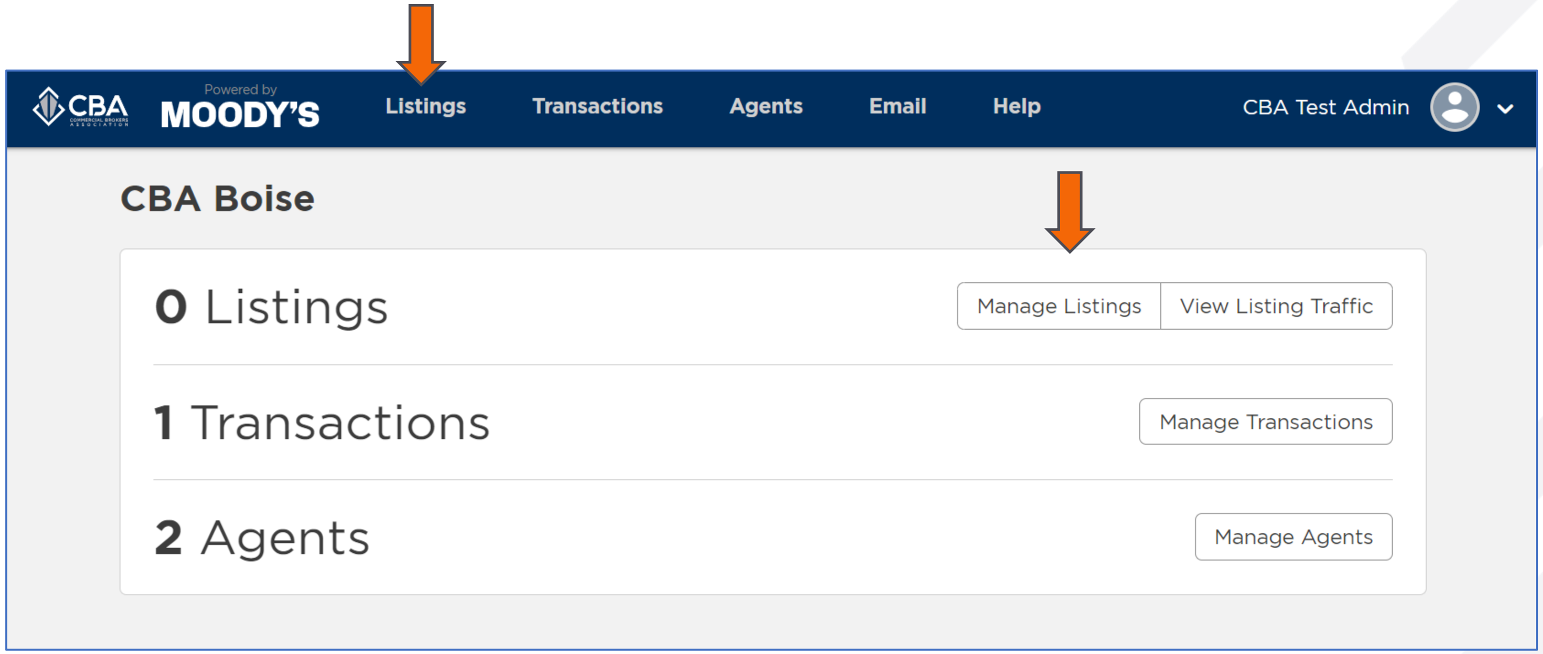


MANAGE LISTINGS

Accessing your office listings

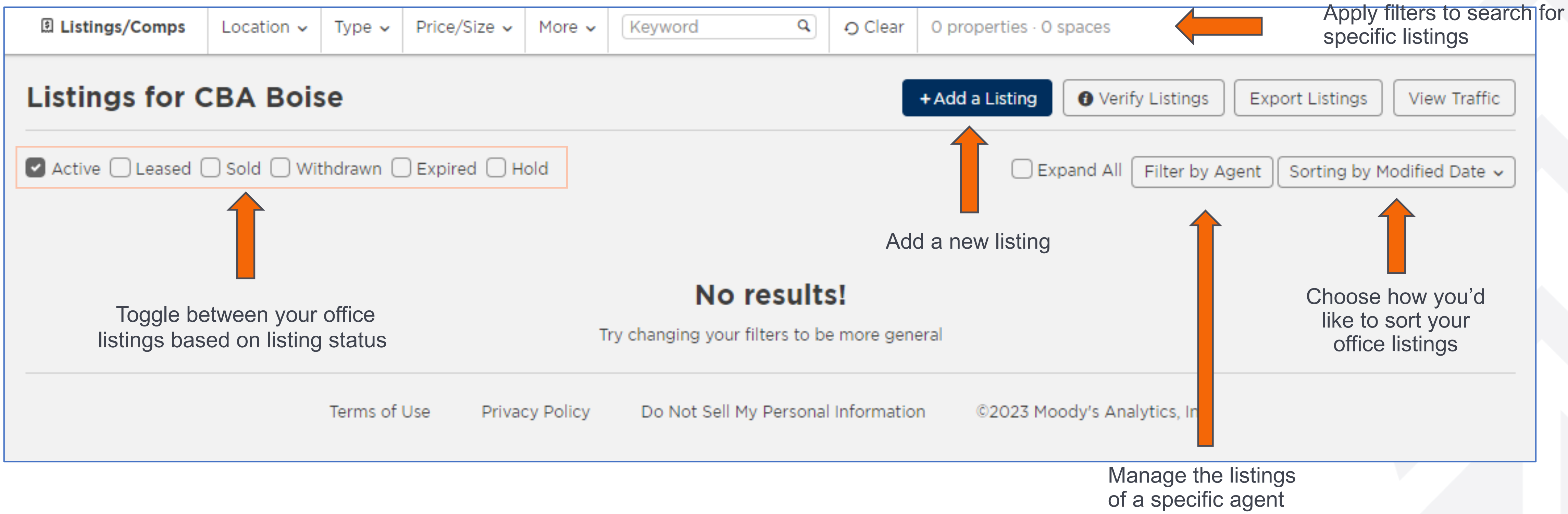
You can access your office’s active and off-market listings by selecting “**Listings**” on the toolbar.

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



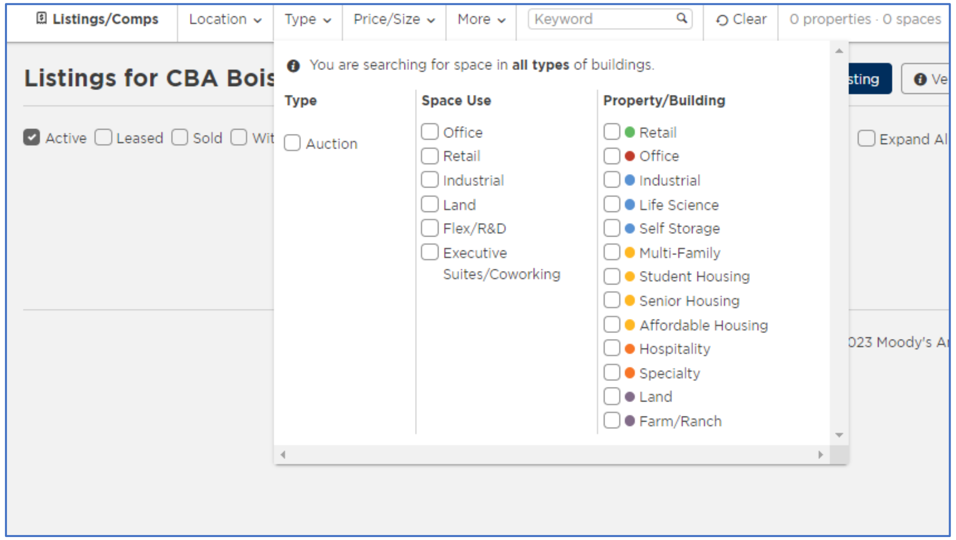
MANAGE LISTINGS

Navigating the Manage Listings page

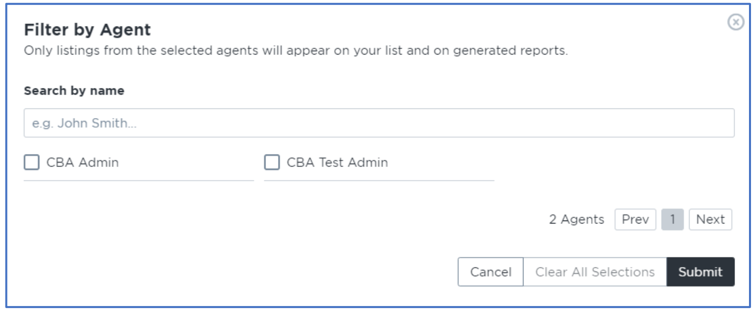


MANAGE LISTINGS

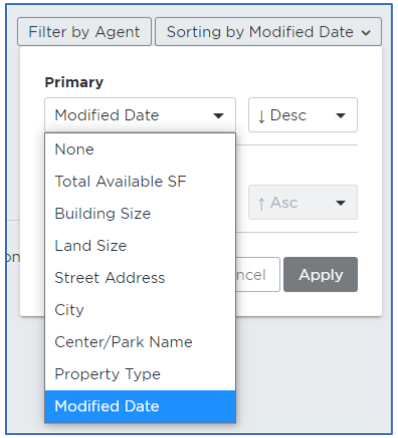
Quick tips to help with managing your office listings



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.

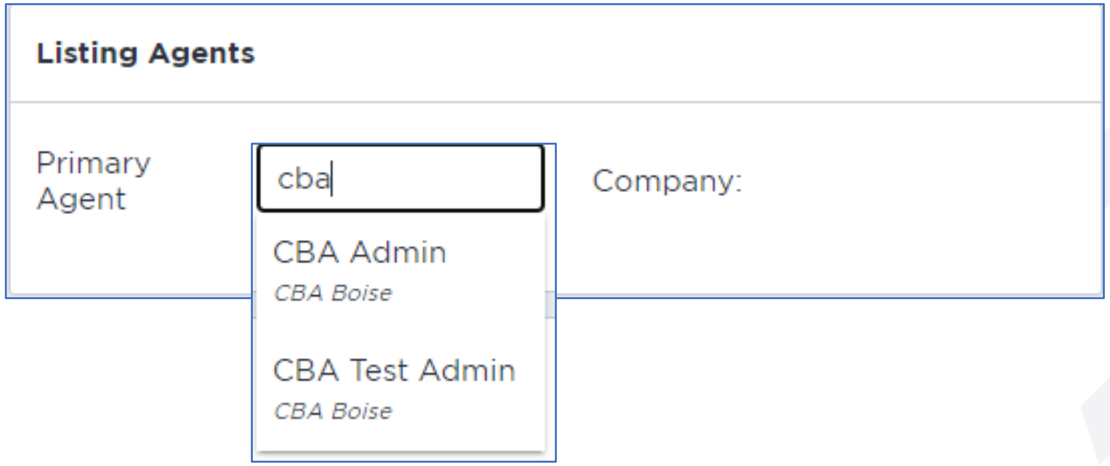


Use different methods to sort your office's listings to make the listing management process even easier for you!

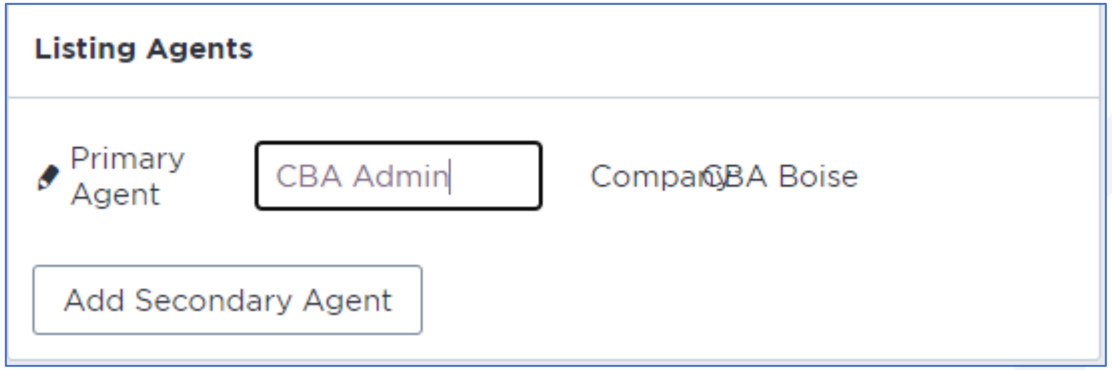
MANAGE LISTINGS

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!



For more information view the Listing Management how-to-guide

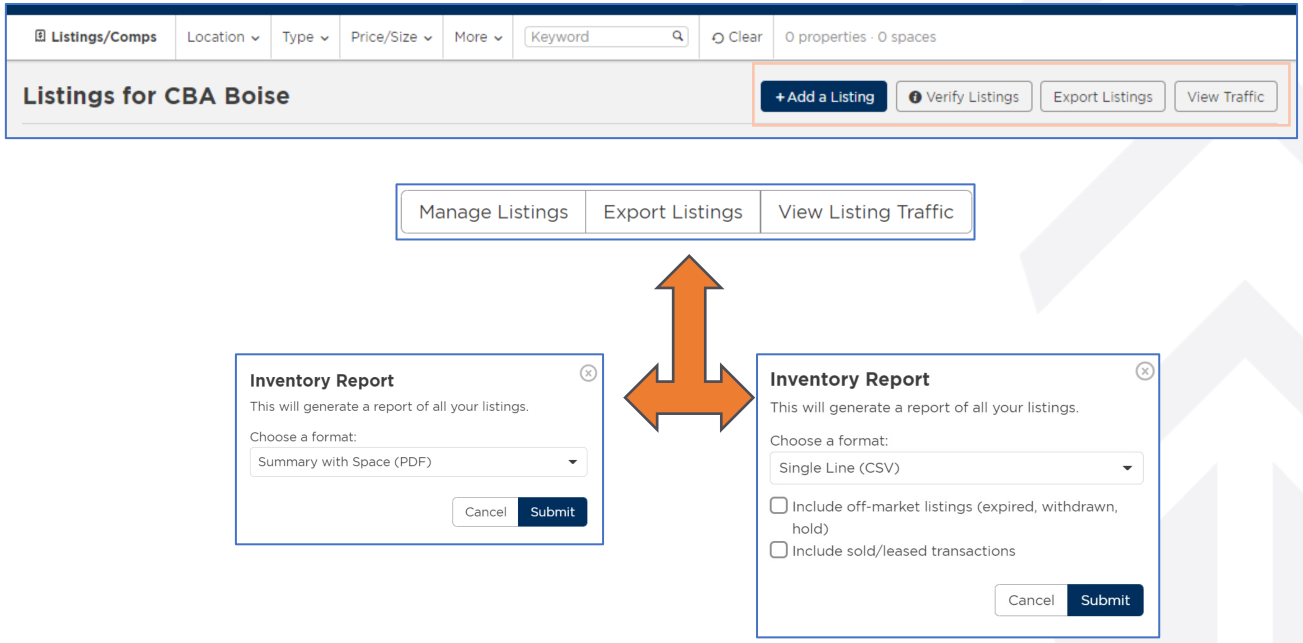
MANAGE LISTINGS

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.

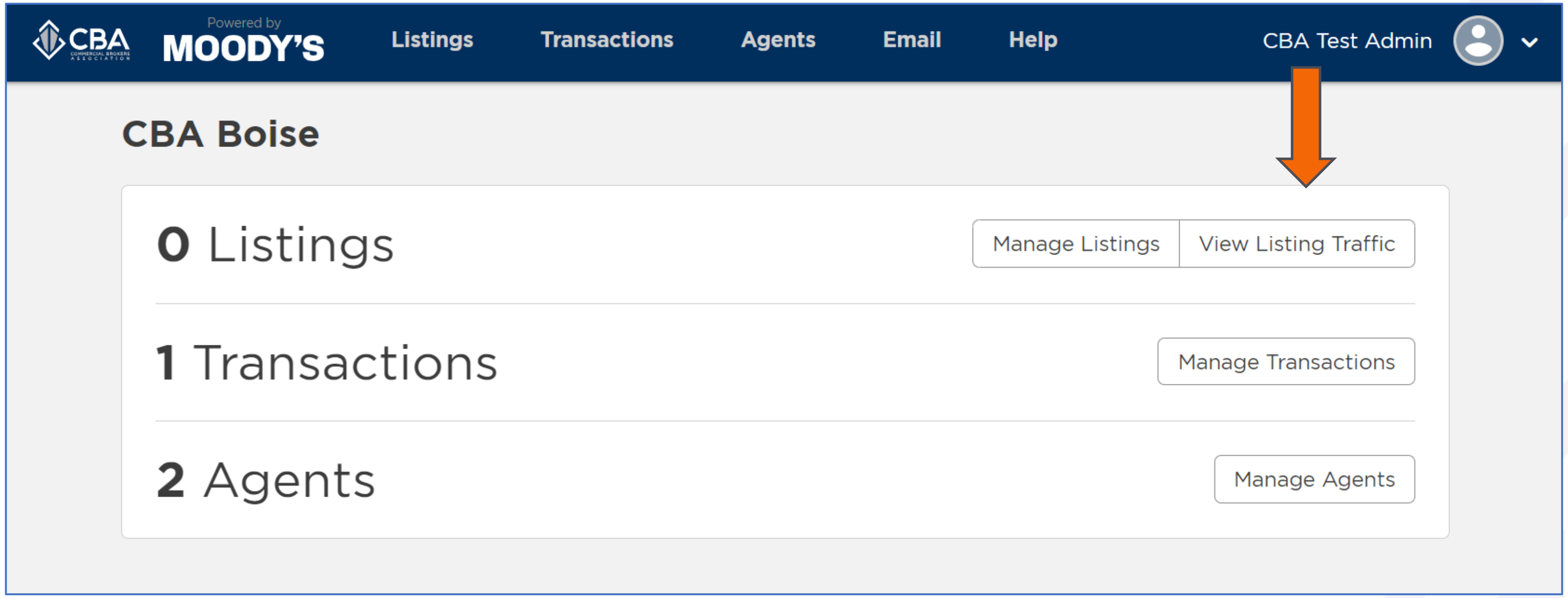
If you would like to include your off-market listings in your inventory report you will want to select the Single Line (CSV) report and select the off-market listing types you would like to include.



VIEW LISTING TRAFFIC

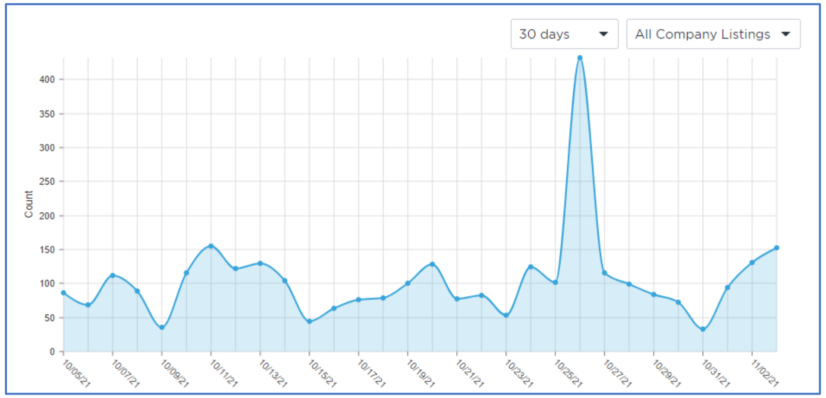
Accessing traffic count reports for your office listings

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



LISTING TRAFFIC

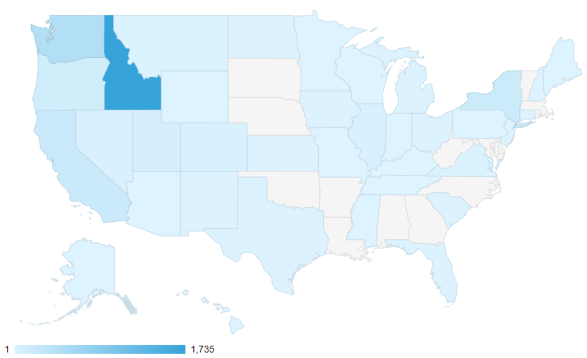
The different types of traffic reports



Views:

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

Locations



Top US Cities	
Boise, Idaho	581
Meridian, Idaho	327
Nampa, Idaho	249
New York, New York	182
Seattle, Washington	119
Mountain Home, Idaho	108
Caldwell, Idaho	93
Eagle, Idaho	91
Portland, Oregon	64
Washington, District of Columbia	56

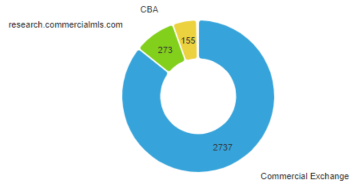
Other Countries	
Canada	5
United Arab Emirates	3
Qatar	1
Ireland	1
Singapore	1
Costa Rica	1

Request location is estimated based on IP address and may vary in accuracy

Locations:

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

Sources



Commercial Exchange	2737
research.commercialmls.com	273
CBA	155
Catylist	1

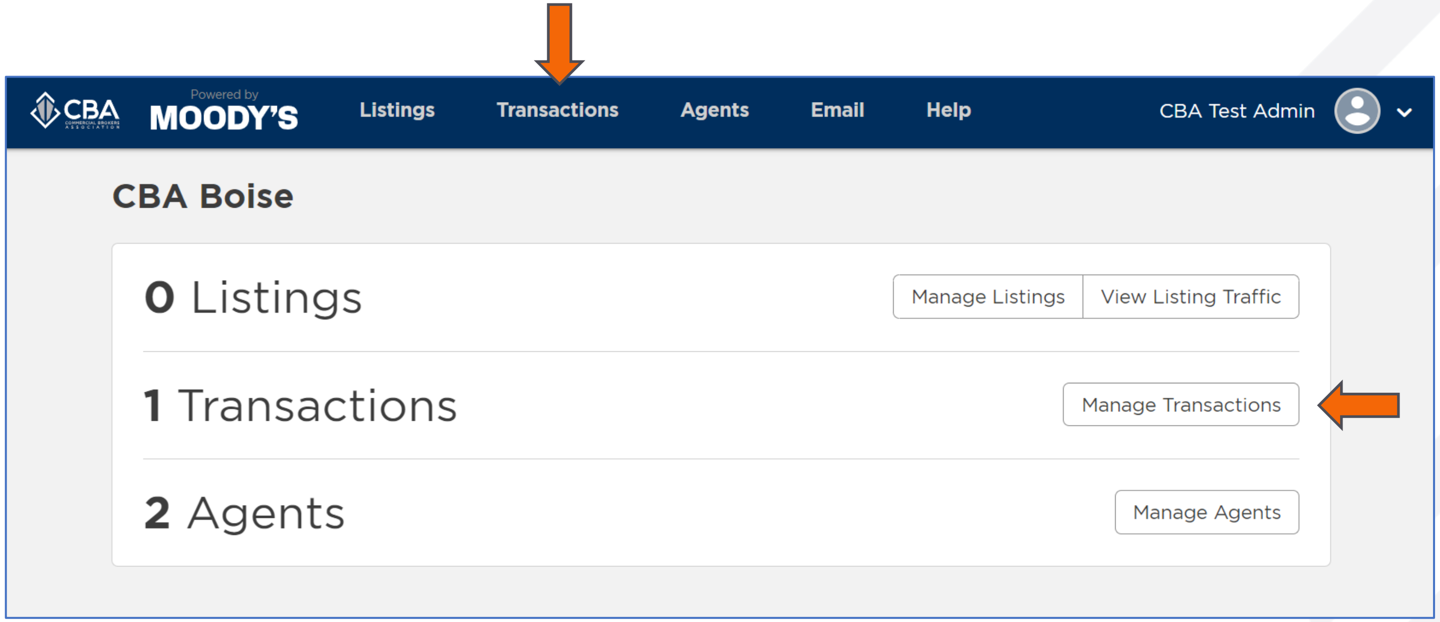
Sources:

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

MANAGE TRANSACTIONS

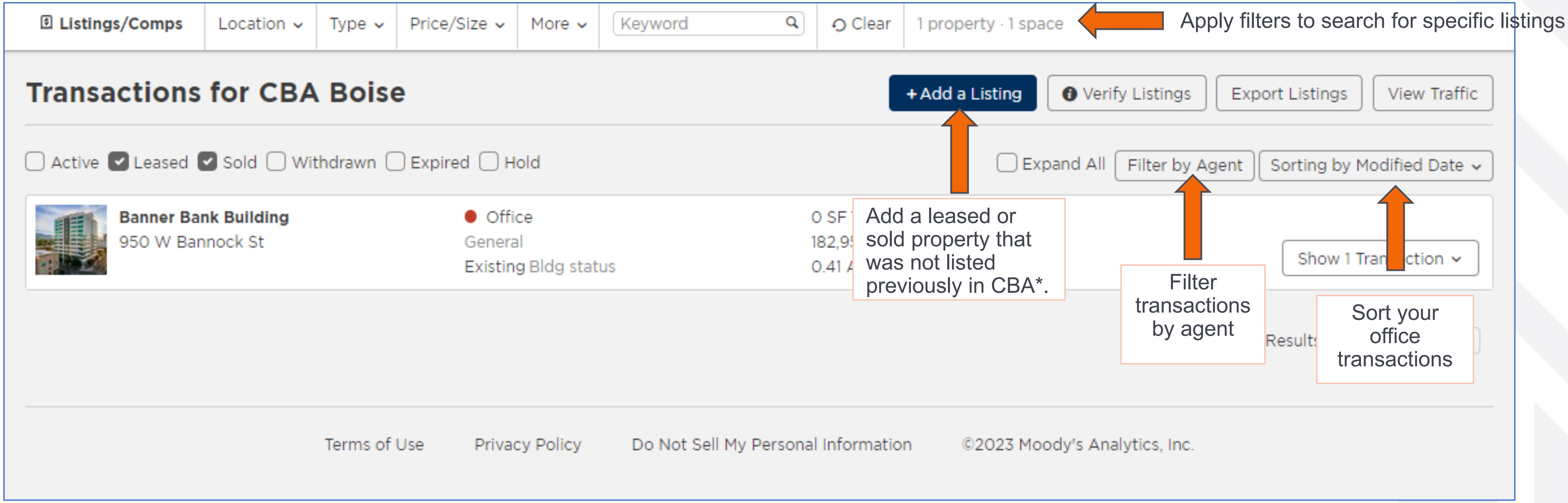
Accessing your offices sold and leased listings

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.



MANAGE TRANSACTIONS

Navigating the manage transactions page



*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

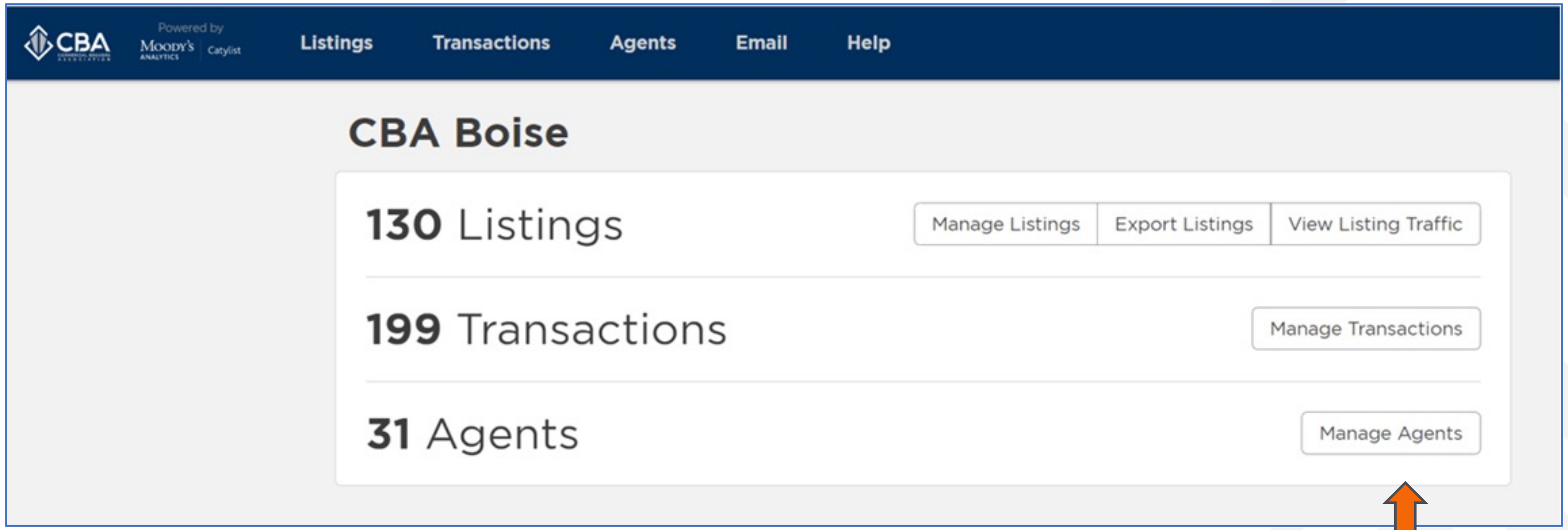
MANAGE AGENTS

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.



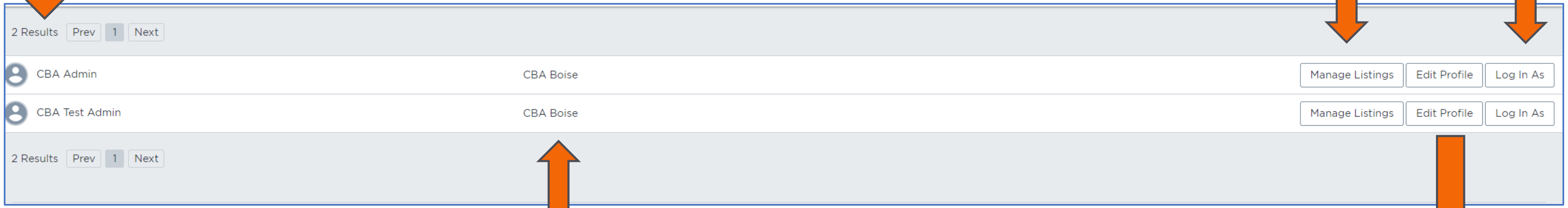
MANAGE AGENTS

Accessing and managing agent profiles

Agent Name

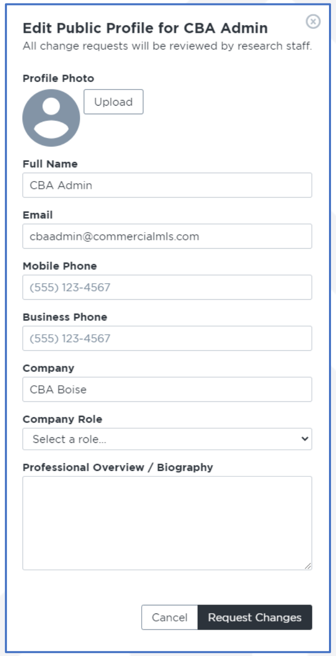
Manage the agent's listings

Log in as the agent to perform a search



Office Name

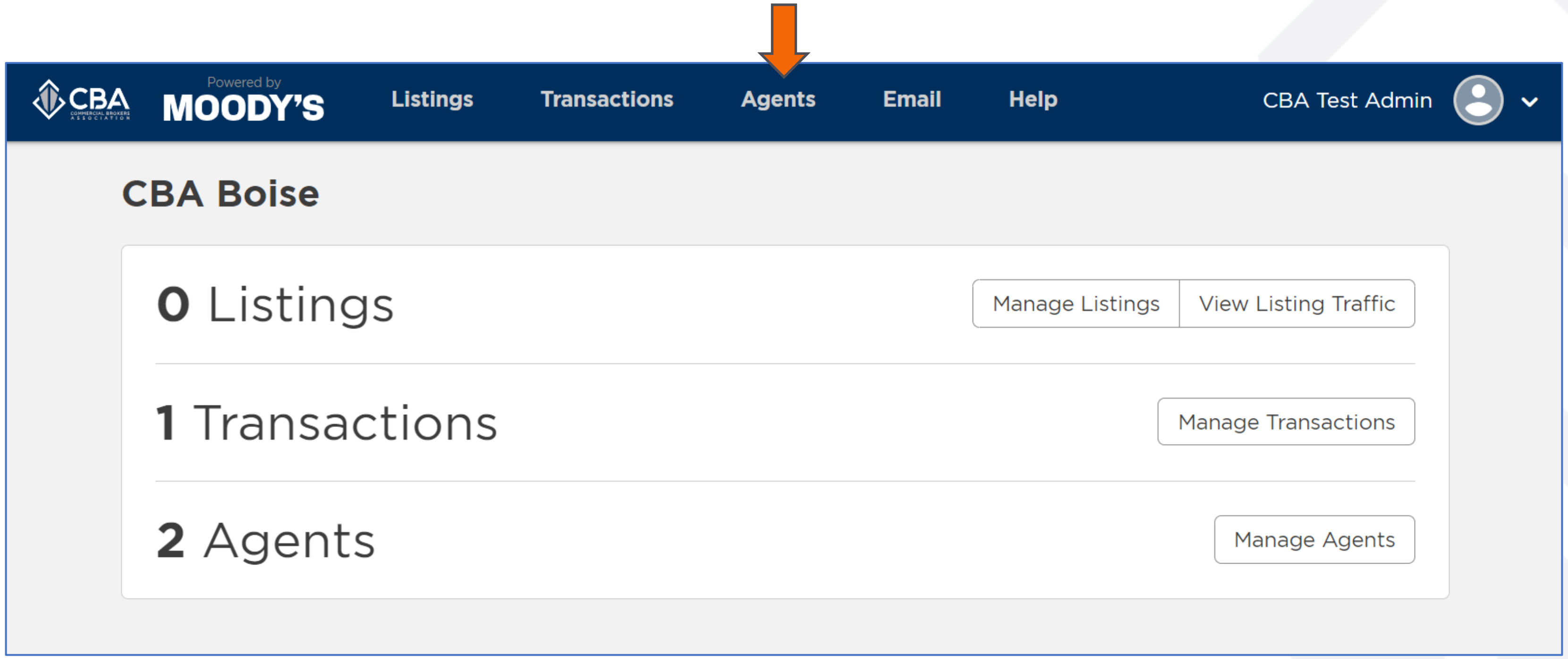
Submit an official request to make a change to the agent's public profile information.



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.



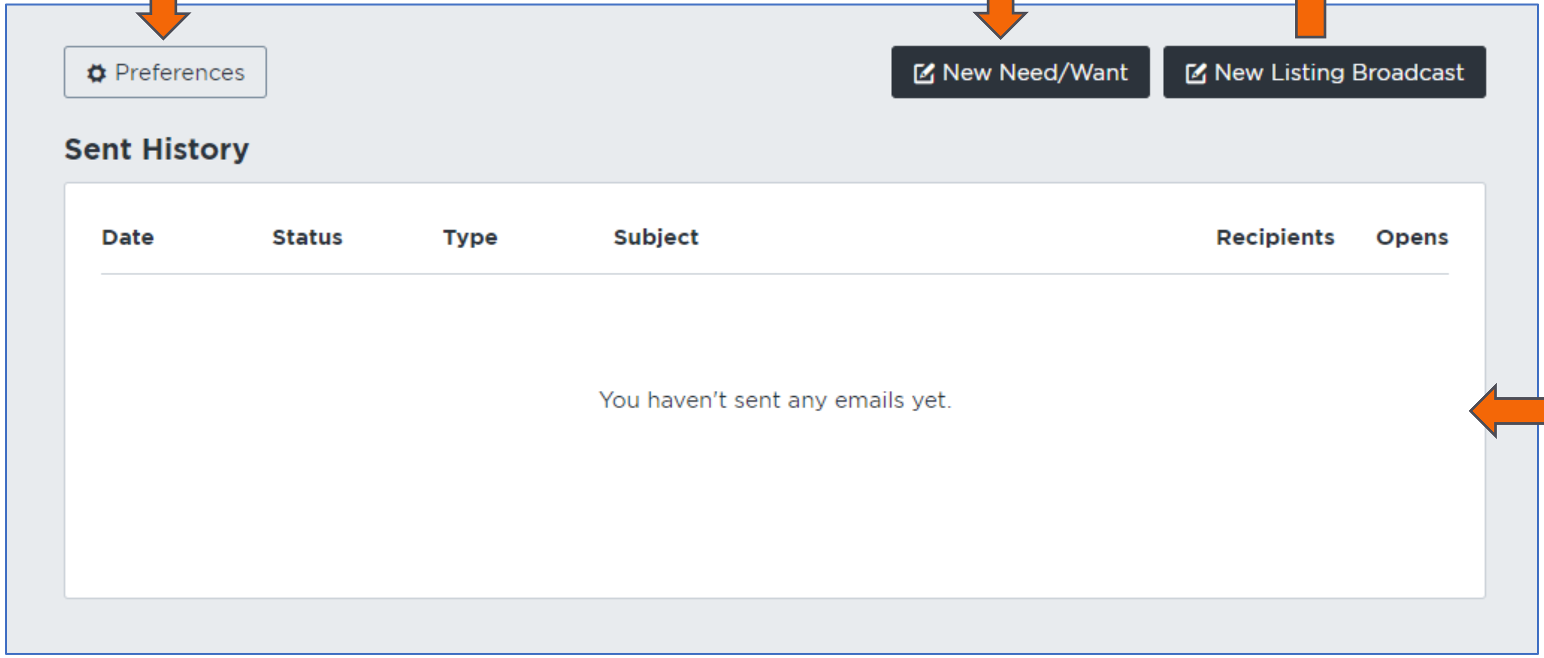
ADMIN E-MAIL

Understanding the e-mail dashboard

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

For more information, please view the Email Marketing Tools how-to-guide.

