



MARKETING TOOLS

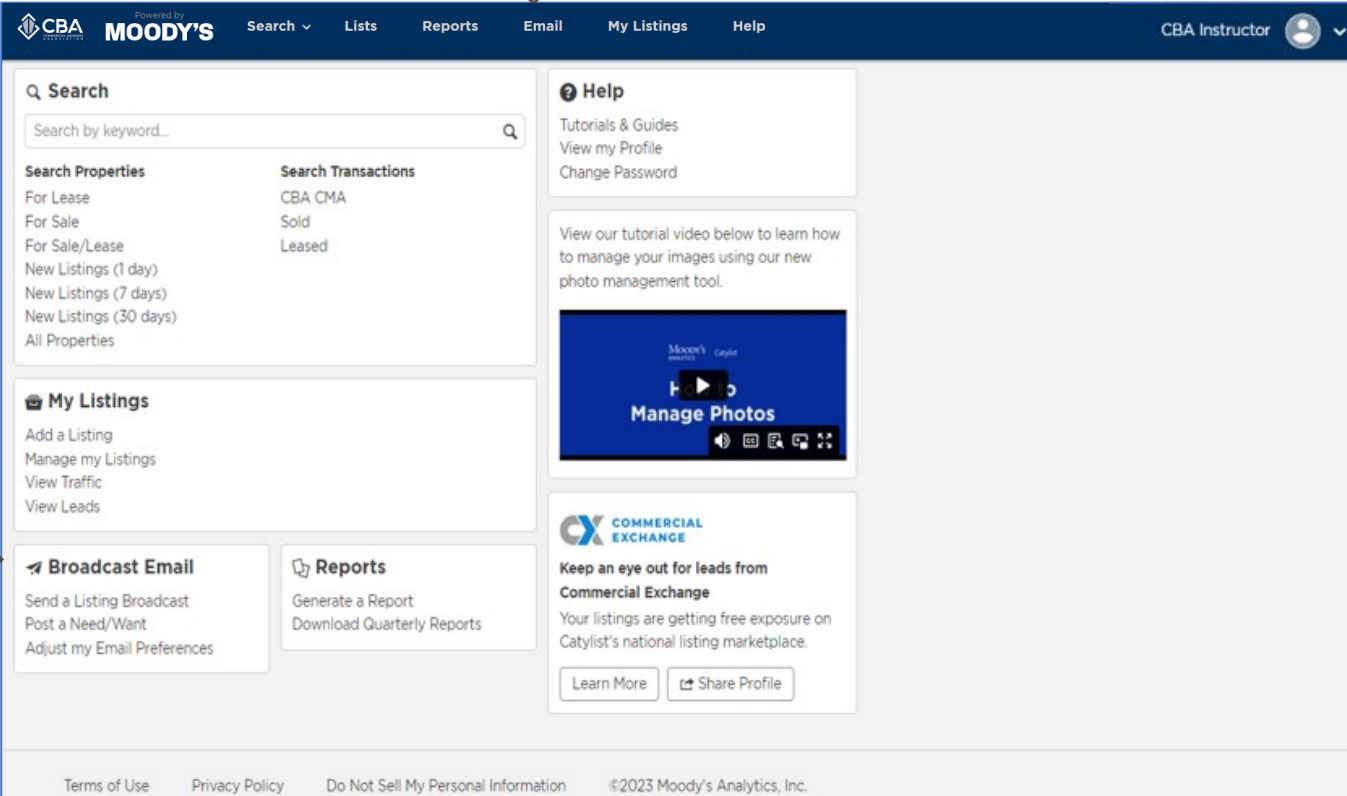
In this guide we will review the e-mail marketing tools available to you.

ACCESSING YOUR E-MAIL MARKETING TOOLS

You have a few different ways to use and access the e-mail marketing tools within the platform:

No matter what page you are on you can select **Email** on the toolbar and this will allow you to see the sent history of your e-mails, send broadcast e-mails, post a want/need, and refine your e-mail preferences.

If you are on the dashboard, the links in the **Broadcast Email** section will allow you to directly access the different areas covered in this guide.



The screenshot shows the Moody's CBA Instructor dashboard. At the top, a dark blue navigation bar contains the CBA logo, 'Powered by MOODY'S', and menu items: Search, Lists, Reports, Email, My Listings, and Help. The 'Email' menu item is highlighted with an orange arrow pointing down. The dashboard content is organized into several sections: a search bar, a 'Search Properties' and 'Search Transactions' grid, a 'My Listings' section, a 'Broadcast Email' section with links for 'Send a Listing Broadcast', 'Post a Need/Want', and 'Adjust my Email Preferences', and a 'Reports' section with links for 'Generate a Report' and 'Download Quarterly Reports'. On the right side, there is a 'Help' section with links for 'Tutorials & Guides', 'View my Profile', and 'Change Password', followed by a video player for 'Manage Photos' and a 'COMMERCIAL EXCHANGE' advertisement. At the bottom, a footer contains links for 'Terms of Use', 'Privacy Policy', 'Do Not Sell My Personal Information', and '©2023 Moody's Analytics, Inc.'. An orange arrow points from the 'Broadcast Email' section to the text on the left.



OVERVIEW OF THE EMAIL PAGE

After selecting **Email** from the toolbar, it will send you to your e-mail page. There are 4 features you can utilize from this page.

Preferences: Opt-in or out of receiving marketing e-mails from the membership.

Sent History: View how many CBA members received your broadcast e-mails and how many of those members opened the broadcast. You can also click on the information in your sent history to view a copy of the broadcast e-mail that was sent out.

New Need/Want: Send an e-mail to the membership to let them what you (or your client) are looking for.

New Listing Broadcast: Send an e-mail to promote your active listings to CBA members.

The screenshot shows the 'Email' page in the CBA Moody's system. The top navigation bar includes 'CBA MOODY'S', 'Search', 'Lists', 'Reports', 'Email', 'My Listings', 'Help', and 'CBA Instructor'. Two orange arrows point to the 'Email' menu item and the 'New Need/Want' and 'New Listing Broadcast' buttons. Below the navigation bar, there is an 'Email Preferences' button with an orange arrow pointing to it. The main content area is titled 'Sent History' and contains a table with columns for 'Date', 'Status', 'Type', 'Subject', 'Recipients', and 'Opens'. The table is currently empty and shows a 'Loading' spinner. At the bottom of the page, there are links for 'Terms of Use', 'Privacy Policy', 'Do Not Sell My Personal Information', and '©2023 Moody's Analytics, Inc.'.



SENDING A BROADCAST E-MAIL

Broadcast e-mails or “Eblasts” allow you to promote your listings to other CBA members who have matching preferences. You can begin this process from the email screen and selecting "New Listing Broadcast" or from the My Listings screen and selecting "promote"

The screenshot displays the CBA MOODY'S web interface. The top navigation bar includes the CBA logo, the text "Powered by MOODY'S", and menu items for Search, Lists, Reports, Email, My Listings, and Help. The user is logged in as "CBA Instructor". Below the navigation bar, there are three main buttons: "Email Preferences", "New Need/Want", and "New Listing Broadcast". An orange arrow points to the "New Listing Broadcast" button. Below this, a listing card is shown with an "Active" status and four action buttons: "Edit", "View", "Promote", and "See Traffic". An orange arrow points to the "Promote" button.



SENDING A BROADCAST E-MAIL

Choose Property

Select which property you'd like to include in the broadcast.

My Properties (select one)

<input type="radio"/>	12011 113 Ave NE	Land	100 SF
<input type="radio"/>	12007 113 Ave NE	Retail	1,200 SF
<input type="radio"/>		Land	9.71 Acres
<input type="radio"/>	Big Tail Rd	Land	1,234 SF
<input checked="" type="radio"/>	12131 113th Ave NE	Office	10 SF - 1,000 SF
<input type="radio"/>	Touchstone Kirkland Building	Office	1,000 SF

6 Properties

Step 1: Select the property you would like to send a broadcast e-mail for.

Choose Listings & Flyers

Select which listings and flyer you'd like to include in the broadcast.

	12131 113th Ave NE	Office	10 SF - 1,000 SF
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Listings (can select multiple)

<input type="checkbox"/>		Office For Lease	10 SF
<input checked="" type="checkbox"/>		Office For Lease	100 SF
<input checked="" type="checkbox"/>	Suite 7	Office For Lease	1,000 SF

The selection does not include any available flyers.

Step 2: Select the listing(s) you would like to send a broadcast e-mail for.

Note: this step is only applicable when starting from the "Send Broadcast" on the email page and not required when directly selecting promote from a listing from your My Listings page.



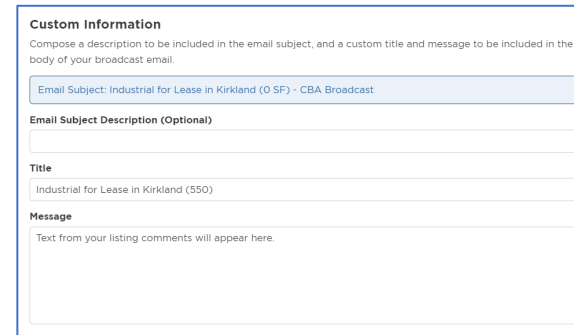
SENDING A BROADCAST E-MAIL

Step 3: Make the changes to the title and the message of the broadcast e-mail here if you would like to make them.

The system will generate a title for you based on the type of listing, the location, and the square footage available of the listing(s). If you would like to add additional language to that you can add it in the Email Subject Description Line

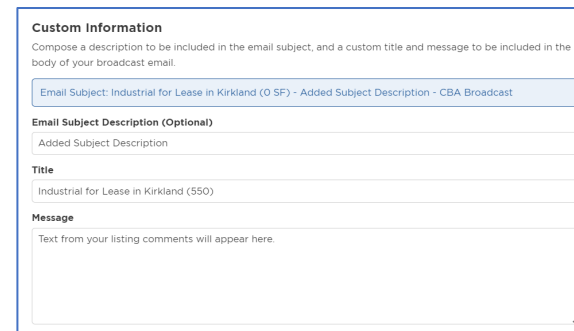
If you do not change the message, it will simply pull the comments directly from your listing. Making changes here will not change your listing comments – just the message in your broadcast e-mail.

Without a subject description:



The screenshot shows a form titled "Custom Information" with a close button in the top right corner. Below the title is a sub-header: "Compose a description to be included in the email subject, and a custom title and message to be included in the body of your broadcast email." There are three input fields: "Email Subject" containing "Industrial for Lease in Kirkland (0 SF) - CBA Broadcast", "Email Subject Description (Optional)" which is empty, "Title" containing "Industrial for Lease in Kirkland (550)", and "Message" containing "Text from your listing comments will appear here." There is a small icon in the bottom right corner of the form.

With a subject description:



The screenshot shows the same "Custom Information" form as above, but with the "Email Subject Description (Optional)" field filled with "Added Subject Description". The "Email Subject" field now contains "Industrial for Lease in Kirkland (0 SF) - Added Subject Description - CBA Broadcast". All other fields and the message content remain the same as in the previous screenshot.

*Please remember if you're making a change to the text should not be in all caps.



SENDING A BROADCAST E-MAIL

Step 4: Review your broadcast e-mail. Make sure that the information included is correct. If you need to make a change you can simply hit the back button.


You can communicate with CBA staff about any special requests for your broadcast such as resending due to price change or date/time preference for sending your broadcast. The comments here will only be seen by the CBA staff so if it is something you want the membership to see please remember to include that text in the message block provided in step 3.

Once you confirm and update these details you can click “Submit” and this will send your broadcast e-mail to the CBA staff for review.


Broadcast E-mail requests are reviewed regularly throughout the day, once your broadcast has been approved and sent out you can track the number of recipients in the sent history section of your E-mail dashboard.

Broadcasts are automatically sent out to brokers who have updated their email preferences that match your listing.

Finish
Examine the preview, write a message to the researchers, and submit for approval.




Office for Lease in Kirkland (100 - 1,000 SF)




12131 113th NE, Kirkland, WA 98034

Office for Lease in Kirkland (100 - 1,000 SF)
The text in your listing will appear here.



12131 113th NE
Office For Lease
100 SF
[View Listing](#)



12131 113th NE, Suite 7
Office For Lease

Explain to the researchers why this broadcast should be sent out.

Message to the CBA Staff

[← Back](#) [Cancel](#) [Submit](#)

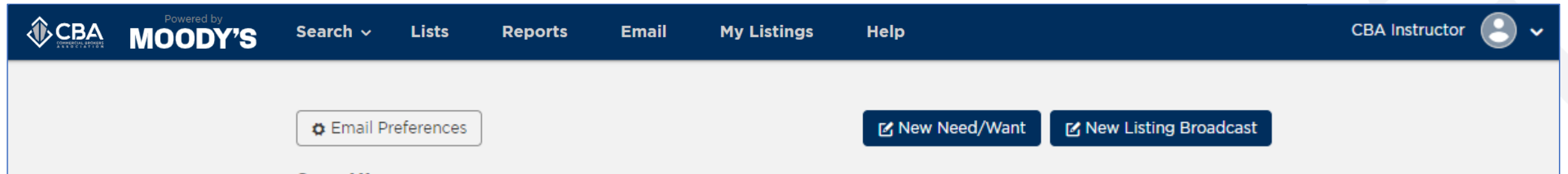


BROADCAST E-MAIL GUIDELINES

- You may send out a broadcast on a particular listing once every 4 weeks unless there is an extenuating circumstance (Example – major price reduction or upcoming broker open house) please make sure to note this reason in your comments to the researchers.
- Brokers are allowed to send a maximum of 4 broadcast e-mails per day.
- Duplicates or too many requests for the same broadcast will be rejected.
- Flyers attached to the listing must have the same broker information. No non-member contacts or competitor links are allowed.
- In order to send a broadcast, there must be an image attached to the listing.
- If your broadcast was not approved for any reason such as missing information, you will be sent an email from CBA explaining the reasons it was not approved. Please respond back to us with any missing information or make the appropriate updates to ensure your broadcast gets out in a timely manner.
- If you want to receive your own broadcast, you will need to ensure your preferences are updated to receive broadcasts for the specific area and asset class of the listing.
- The broadcast requests are checked by CBA every 2 hours to ensure that they are sent out in a timely fashion.



POSTING A WANT/NEED



Need/Wants allow you to e-mail other CBA members what type of properties/listings that you (or your client) would like to purchase or lease.

This is a great feature to use if you're looking for something very specific and you've been unsuccessful with locating listings via a traditional search.



POSTING A WANT/NEED

Post a Need/Want

Needs/Wants are properties that you (or your client) seek to purchase or rent.

This requirement will be broadcast via email to members who have matching preferences.

Looking for... Sale
 Lease
 Sale or Lease

Property Type

Locations

Title

Description

In order to post a want/need to the membership you will need to fill in the following categories:

Looking For: Select what type of listing you are looking for.

Property Type: Choose what asset class (or classes) you are looking for

Locations: Where would you like the property to be? This section can be entered as a city, a state, a county, a zip code, and you can even use the old CBA Submarket areas*.

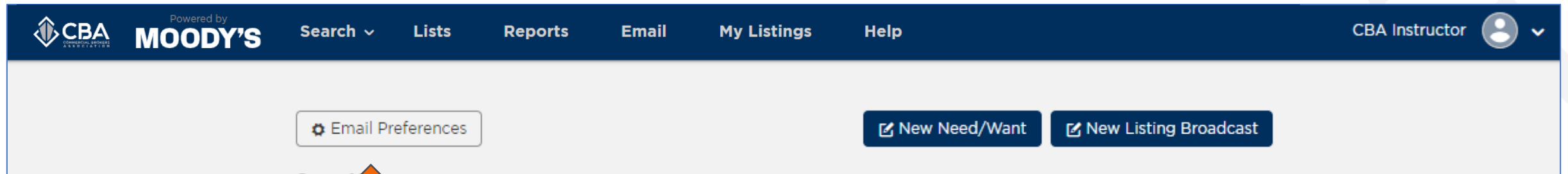
Title: Give a brief idea of what you're looking for.

Description: This is where you'll want to get very specific about what you're looking for. The more detailed you are here, the more relevant the responses you receive will be!

Tip: you can add multiple locations to your request. Add one area and then begin typing again to add additional areas.



ADJUSTING YOUR EMAIL PREFERENCES



Preferences are how you choose what type of e-mails you'd like to receive. You can adjust your preferences to match specific property types, locations and marketing email types



ADJUSTING YOUR EMAIL PREFERENCES

The system automatically set you up with a subscription to receive all broadcast e-mail types within your market. If this is not something you want and you would like to set up your own subscriptions, simply remove the general subscription and set up your own!

When you go in to set up your broadcast e-mail subscriptions you will need to fill in three sections:

Area of interest: Select the location you would like to receive broadcast e-mails for. You can enter this section as a city, a state, a county, a zip code, and you can even use the old CBA Submarket areas*.

Property Type: Choose what asset class (or classes) would you like to see broadcast e-mails on.

Listing Type: Select the type of listings that you would like to receive.

Areas and Types of Interest

Specify the location and property type combinations for which you'd like to receive broadcast email.

Seattle, WA	<input checked="" type="radio"/> Retail	Sale	<button>Remove</button>
CBA Fremont/Ballard	<input checked="" type="radio"/> Industrial	Sale or Lease	<button>Remove</button>
98042	<input type="radio"/> Any Type	Lease	<button>Remove</button>

New subscription

Tip: You can set up multiple subscriptions in your preferences. They can be broad or very specific in the listing types and assets classes.



ADJUSTING YOUR EMAIL PREFERENCES

Email Receipt Preferences
Choose which kinds of emails you would like to receive.

Needs/Wants
Messages about a particular need for commercial real estate, posted by a member or the general public. Immediately

Leads
Messages about recent leads for active listings. Never

Viewed Saved Downloaded Flyer Viewed Contact Info Emailed Agent

Listing Broadcasts
Messages with one or more property listings attached, sent by a Catylist Network member.

Messages from Catylist
Infrequent messages about new features, training sessions, and related products and services.

Your email receipt preferences allow you to opt-in to receiving e-mails from the system and allow you to select the frequency of which these e-mails come to you.

Secondary Emails
Have others receive emails that were sent to you.

Alternate Address
Route all of your emails to a different address instead of your primary one.

Copied Addresses
Carbon copy another email address on all messages you receive.
(none specified)

Blocked Senders
Any messages sent to you from the emails below will be blocked.
(none specified)

If you do not want these e-mails to go to the e-mail attached to your CBA profile you can enter the e-mail address you would prefer them to go to here.

If you would like a second e-mail address to receive the same messages, enter that second e-mail here.

If you are repeatedly getting emails from a sender that doesn't match your business needs, but your filters are set correctly to your preferences, then you can choose to add that member to your blocked senders list. This step is anonymous and provides you with more control over the emails you receive in your inbox.

