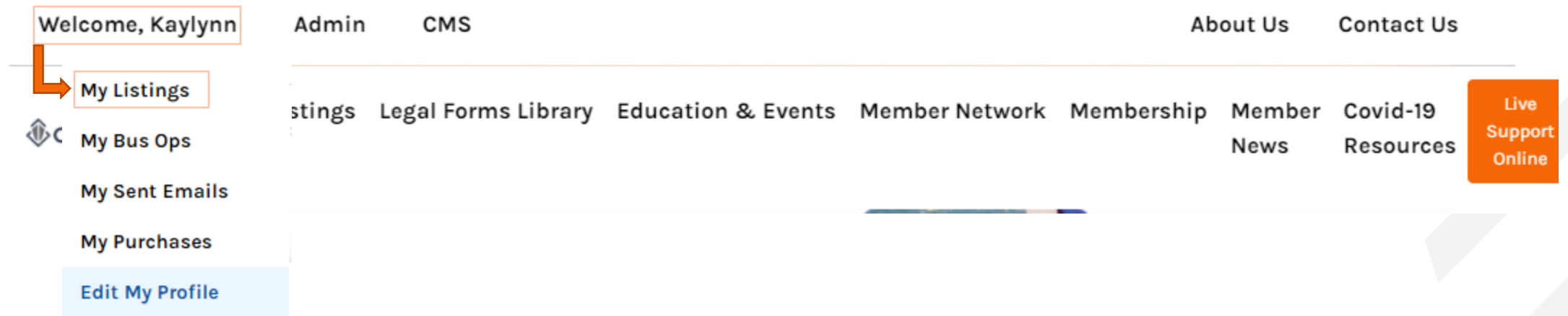# LISTING MANAGEMENT

In this guide we will be going over how to add a new For Sale or For Lease listing, add a property record, and how to edit an existing listing.

LISTING MANAGEMENT:

Accessing your listings

To access your For lease and For sale listings you will want to click on "Welcome, NAME" once logged into your CBA account.

Once the dropdown menu appears select "My Listings" to go into Catylist.

ADDING A LISTING

How to input a listing

There are several ways to add a listing – you can do so via the search map, the quick links on your Catylist-powered dashboard, and via your My Listings page.

Use the search map to locate your property and then add a listing.

Go through your My Listings page to add a listing.

Quick link to searching for a property using the address.

ADDING A LISTING

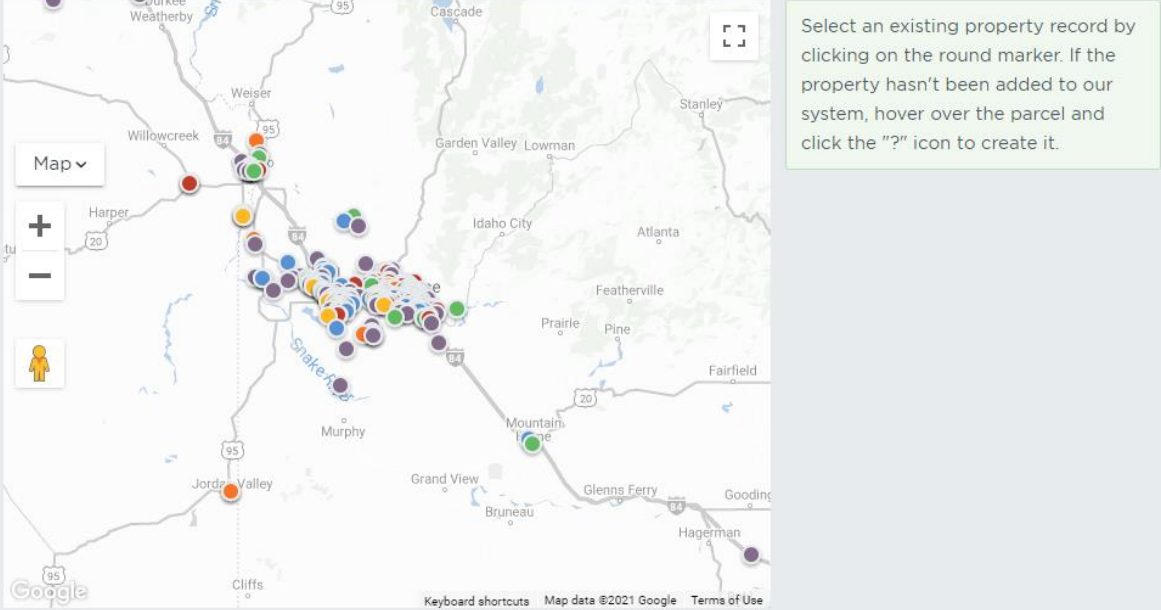## Adding a listing from the quick link or from your My Listings page

If you choose to add a listing via the quick link on your dashboard or on your My Listings page, you will open to the search by property address screen. All listings must be attached to an existing property record so you must first begin by searching for the property to attach your listing to.

You will want to begin typing in your address and then selecting the appropriate address from the dropdown menu that appears in the "Enter a Location" window.

If your property is not in the system yet go to page ## to learn how to input a property record.

Add a Listing   Cancel

First, search for the property by entering an address:

Enter a location

Select an existing property record by clicking on the round marker. If the property hasn't been added to our system, hover over the parcel and click the "?" icon to create it.
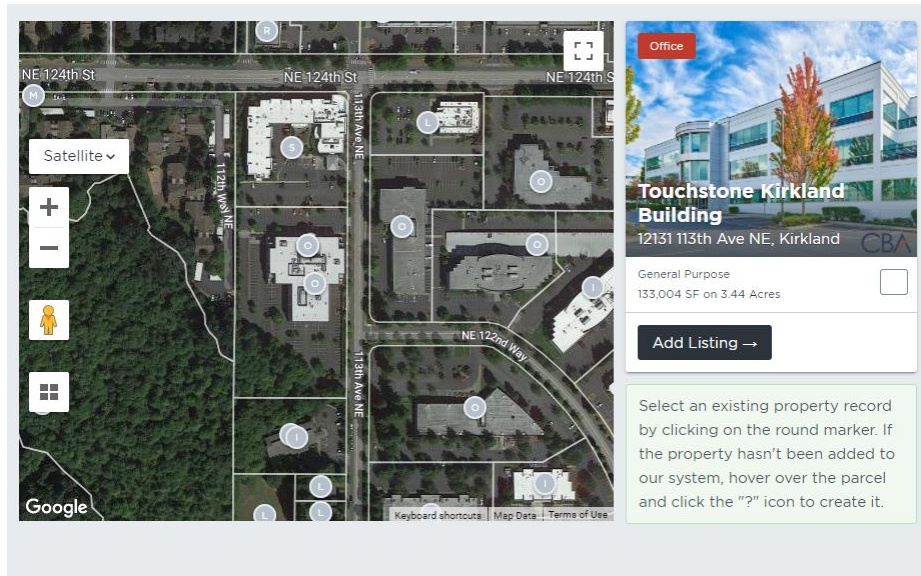
You can also choose to add a listing via the search map if you choose to do so, this is just the most common way to add a listing – to view this method please watch the add a listing video on our YouTube channel.
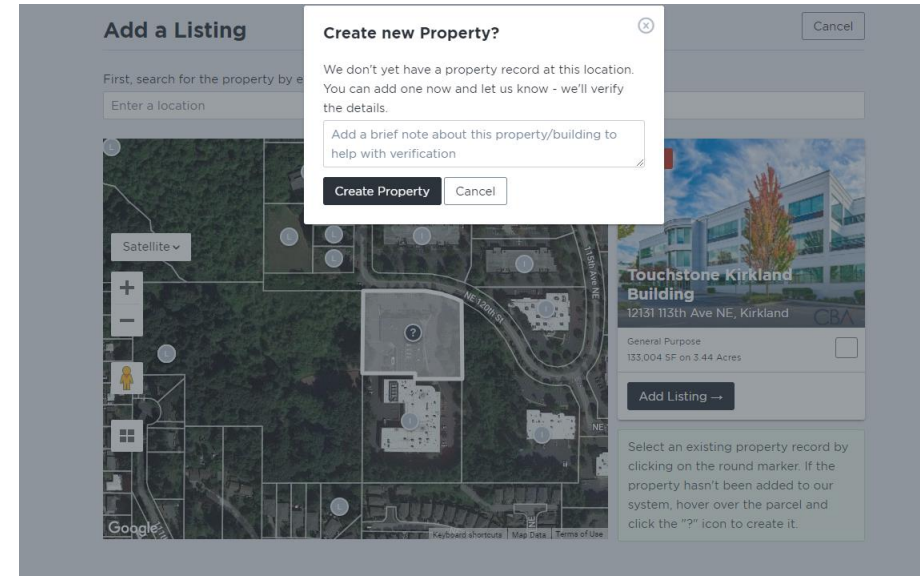
ADDING A LISTING

Adding a listing from the quick link or from your My Listings page part 2

If your address is attached to an existing property record, you will see an image to the right of the search map.

If this is the correct property, you will want to select "Add Listing" to get into the listing input screen.

If the property that pulls up from your address search is not the correct property record, you will want to scroll to the appropriate parcel boundaries. If the little dot that appears here has a "?", this means the record is not yet in the system.

You will need to create a new property record if there is not one in the system for your property.

ADDING A LISTING

Adding a listing from the quick link or from your My Listings page part 3

After you've chosen the correct property record, you will be taken into a screen that shows you the property details. If the property details are accurate, you will want to select **Create new listing** but if you need to make changes, you can select **Edit the property record**.

If you need to edit the property record skip to page 17.

ADDING A LISTING

Listing input

After you've selected the appropriate property and made sure the property record information is accurate, you will then move into the listing input screen.

All previously required data entry fields and rules still apply within the Catylist platform.

Make changes to the property record.

Move between the different sections of the listing input.

Fill in fields

ADDING A LISTING

Listing input – New features, tips and tricks

As you move your cursor between the different fill-in fields, a blue box will appear on the left that tells you what data should be field in for that particular field.

You can now search for a specific field by name or click on the different sections of the listing input in order to move to that section.

When adding additional agents, you can simply begin typing in their name and then select them from the list that appears.

When inputting a lease listing, you can now choose how you want to enter the rate. There is now also an option to list your rate as negotiable.

ADDING A LISTING

Listing input – Requirements for adding a new listing

- Listings should never include the broker's name or contact information. This information will automatically populate at the top of the listing. This applies to all fields, including any "add comments" sections. Instead, please ensure " Call Listing Broker" is marked "Yes".

- PDF's attached to listings cannot contain contact information for an Non-Member of CBA, nor may they contain any links to other listing websites.
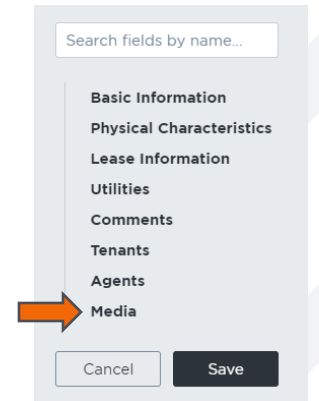
<u>Listings Fields</u>

- Asset Class: Must be appropriate for the space

- LOC/ SOC: The field MUST either be a percentage (2%) or a dollar amount ($2). Or the following acronyms can be entered: • PBB : Used if the listing broker is not offering a commission and the procuring broker must be paid by their tenant. In comments, it must be noted " Commission to be paid by buyer"

- Expiration Date: This date MUST be the date on the listing agreement or management contract

- Investment Property (Sale Listings)- Either a property is an "Investment" or "Owner/User". It cannot be both. If "Investment Property" is checked "Yes" then there MUST be investment information filled in; i.e. Cap rates

- NNN Expenses (Lease Listings): If the lease listing is a NNN lease then this is a required field and must be formatted in the same way as the lease rates (per month/per year)

ADDING A LISTING

Listing input – Adding media to your listings

Search fields by name...

Basic Information
Physical Characteristics
Lease Information
Utilities
Comments
Tenants
Agents
Media

Cancel   Save

Your new listing input now includes a section to add media as you're inputting your listing!

Files

⬆ Upload Flyer PDF

⬆ Upload Floorplan Image

Links / Videos

🔗 Add Link

Add a floorplan or flyer to your listing

Upload associated website links and videos to your listing.

Default Property Photo

Submit Replacement

Listing Photos

Drag to reorder

🖼 Edit Photos

Replace the image attached to the property record.

Add and arrange additional listing images.

ADDING A LISTING

Listing input – Guidelines for additional media

- When uploading a new photo, you must confirm you have copyright or permission to use the image

- Do not use any photos that contain a watermark

- You may add as many additional photos as you'd like

- No contact information can be visible in any of the images added to your listing

- URLs listed cannot contain other competitor listing site, such as CoStar

- Documents added **MAY NOT** contain any listing or contact information for a **non**-CBA member
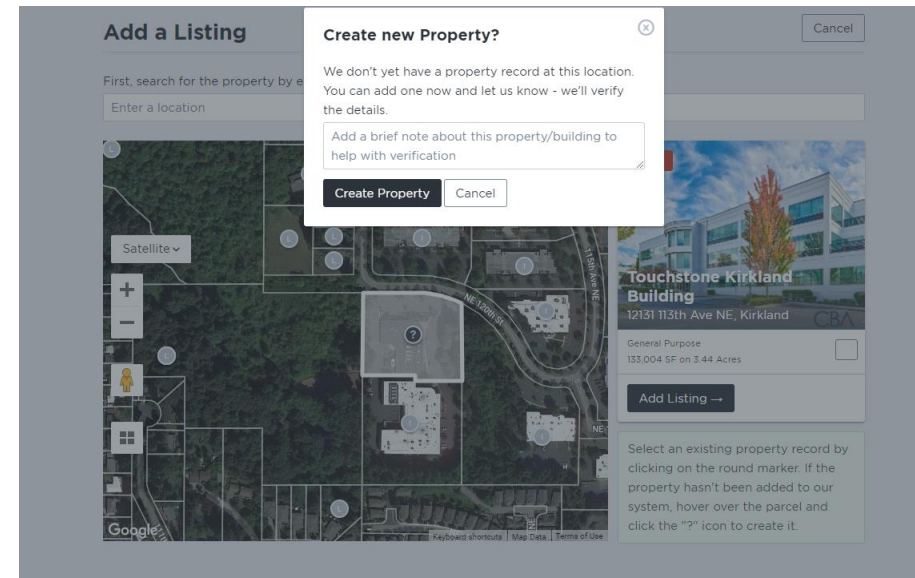
CREATING A PROPERTY RECORD
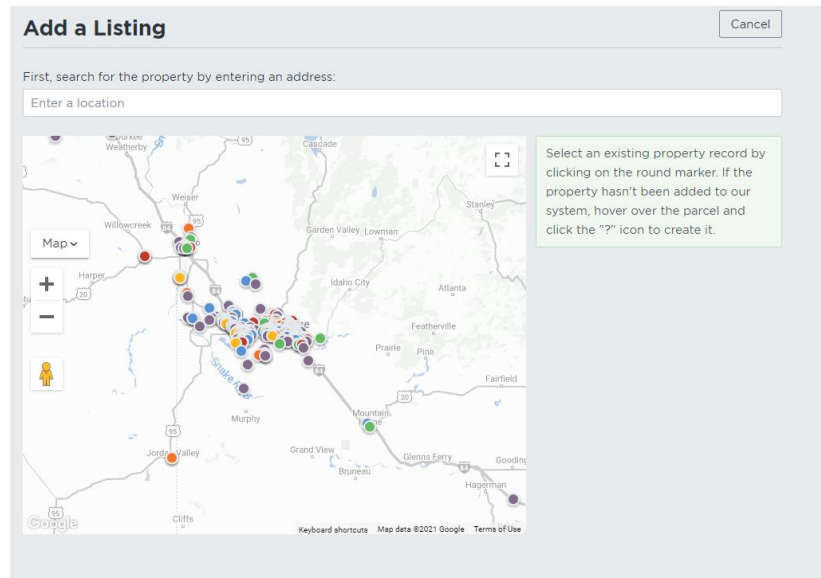
Create a property record for your listing

If your address is attached to an existing property record, you will see an image to the right of the search map.

If this is the correct property, you will want to select "Add Listing" to get into the listing input screen.

If the little dot that appears in your parcel boundary after searching has a "?" this means the record is not yet in the system and you will need to create a new property record before creating your listing.

CREATING A PROPERTY RECORD

Create a property record for your listing

Once you choose to create a property record it will make a record for you that is likely not showing the information that you do want it to appear with. Make sure before entering your listing information you first go into the "Property/Building" section and correct any misinformation.

All information and standards required in the legacy platform are still required in the new platform. To see these tips please review page number 16

CREATING A PROPERTY RECORD

Create a property record for your listing

Image attached to the property record

Jump between the different sections of the property/building input

As you move between fill-in fields, this blue box will update with a definition or example of what should be input here

All information and standards required in the legacy platform are still required in the new platform. To see these tips please review page number XX.

CREATING A PROPERTY RECORD

Create a property record for your listing

If you have filled in all the required fields and are ready to save, select "Save" on the right on the fill in fields.

If you go to submit changes but are missing any required details, you will get a notification of what information is missing at the bottom of your screen.

The section will the missing information will also be highlighted in red.

Once all missing information has been filled in and you're ready to save, click "Save" again. Once the confirm changes pop-up appears, go ahead and select "Submit". These changes will be reviewed and pushed through by CBA Staff.

15

CREATING A PROPERTY RECORD

Requirements for creating a property record

Requirements/Standards for Entering a New Property Record.

- Property Name: Should always be the name of the property ONLY. No marketing remarks and no abbreviation or punctuations.

  Exception: business parks may be entered as " Jane Doe Business Park- Building 12"

- Street Addresses- Numeric street names should not be written out. **Example-** Correct: 9th St Incorrect: Ninth St

- Do not add any spaces or dashes in the TAX ID field. Exception: Parcel numbers in Spokane County which is XXXXX.XXXX format

- If the building is condominiumized, then the Tax ID #1 needs to be the master parcel number. Additional ones may then be added by clicking "Add Another Parcel +"

- The "Property Comments" section must apply to the building, not to the sale of the building or to the spaces available for lease.

- Do not type in **ALL CAPS**

- Building pictures must be an external view of the entire building and may NOT include any viewable leasing or contact information

PROPERTY RECORD MANAGEMENT

Making changes to an existing property record.

You may find that the information within the property record that is attached to your listing or the listing you're creating is incorrect. To make changes, you will simply click "Edit" on your listing and then click on Property/Building to access the property details.

If you go to submit changes but are missing any required details, you will get a notification of what information is missing at the bottom of your screen. The section will the missing information will also be highlighted in red.

When all changes have been made, click save to confirm your changes. Once the confirm changes pop-up appears, add you can add a note for the CBA staff and select "Submit". These changes will be reviewed and pushed through by CBA Staff.

LISTING MANAGEMENT

My Listings Page

Apply filters to help search for your listings

Verify your listings

View the traffic for your listings.

Add a listing

Download your inventory report

Listing tools

The properties you have listings at

Expand the listings at a specific property

LISTING MANAGEMENT

My Listings Page – Quick Tips and Tricks

Choose the way in which the listings on your My Listings page are sorted.
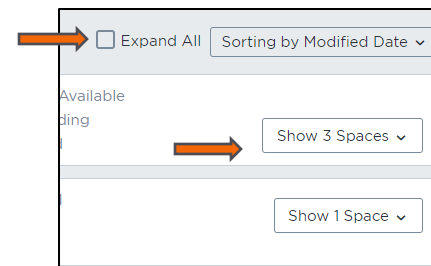
Your my listings page automatically takes you to view your active listings. To switch from your active listings to your off-market listings, change the type from Active to the appropriate off-market status.

All of your listings are condensed in the property that they show under. You can choose to **Expand All** to view all of your listings. To view your listings within one specific property click the **Show X Space(s)**.

LISTING MANAGEMENT:

Managing your listings

When you open your My Listings page, all your listings will be hidden within the appropriate property – to be able to access and make changes to specific listings you will want to start with by selecting either **Show # Space(s)** or **Expand All**.

After you've expanded the property, you will have new listing tools available.

Edit takes you into the update for listing screen

View shows your public listing link

Promote allows you to generate a listing report or request a broadcast

See traffic allows you to see the views on your listings along with where those views are coming from.

Add Space you can use this to skip searching for a property when adding a listing to a property you've already got listings at.
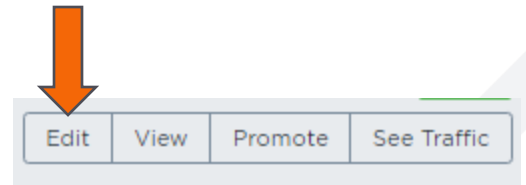
LISTING MANAGEMENT:

Editing your listing

Once you click the edit button you will be taken into the new update listing screen. This screen functions the same way as the listing input screen.

All previously required fields will still be required when updating your listing.

LISTING MANAGEMENT

Edit your listings– New features, tips and tricks

Make changes to the property record

Add a new listing to this property

Return to your My Listings page

Property/Building   Listings   ⊕ Add Listing

View All Listings   ← Back

About this Listing

Active   👥 Public

⊕ See details

Listing Details

Active   Listing is active.

👥 Public   Listing is publicly visible.

12131 113th Ave NE, Kirkland, WA 98034

● Office For Lease   **CBA Test Listing 900 SF**   ⌄

View | Promote | See Traffic | Verify | Duplicate | Remove Listing

Use this drop down to move between your listings at this property

View details regarding the status of your listing

Verify your listing

If you would like to copy the current listing information onto a new listing, simply click the "Duplicate" button and make the appropriate changes.

LISTING MANAGEMENT:

Editing your listing – Sold listing record guidelines

- It is important for accurate records that you update the status of listings once a sale has been completed. The status of your listing is required to be updated within 1 business day of the change. The CMA team at CBA use this information to keep accurate data in our Sales Comparable Database

- After updating your Sale Listing you may receive an Email from our CMA team asking for assistance as they research your sale for our database.

- Please keep in mind that the more accurate information provided to CBA, the better our Sales Comparable Database will be for all members

- Use the "Additional Comments" section to provide any additional information you can provide on the transaction

- While not required, here is some additional information that if provided would reduce the amount of follow up emails needed to complete our records:
    - Buyer and the buyer's broker information such as Name, Company an Intended Use of the property
    - Was the property an Owner/User or Investment? If investment, what is the CAP rate? If Owner, User how much of the property does the buyer plan on occupying?
    - Did either party do a 1031 exchange?
    - Anything unique about the sale that you would like see noted on a comparable?
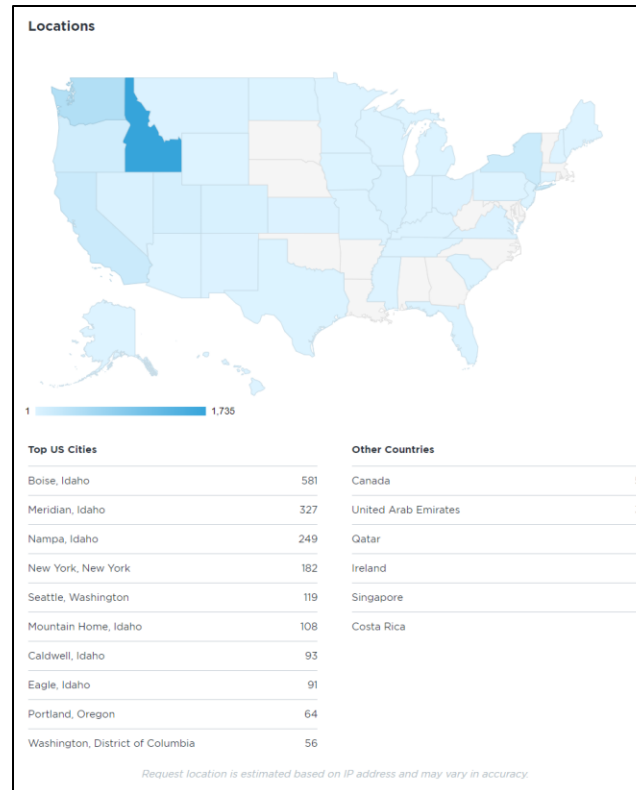
LISTING MANAGEMENT:
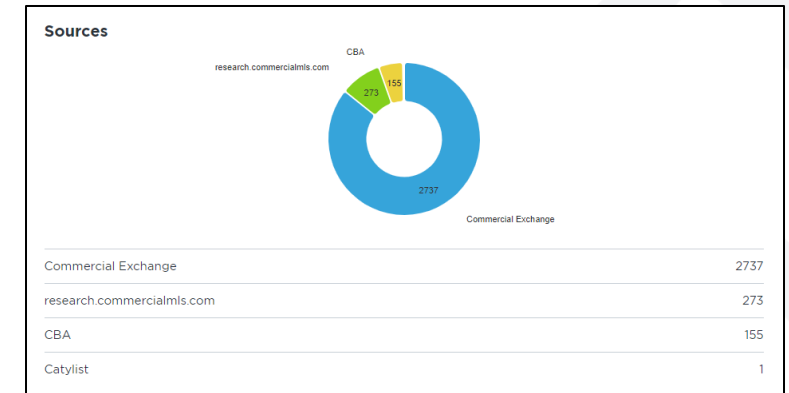
Managing your listings – View Traffic
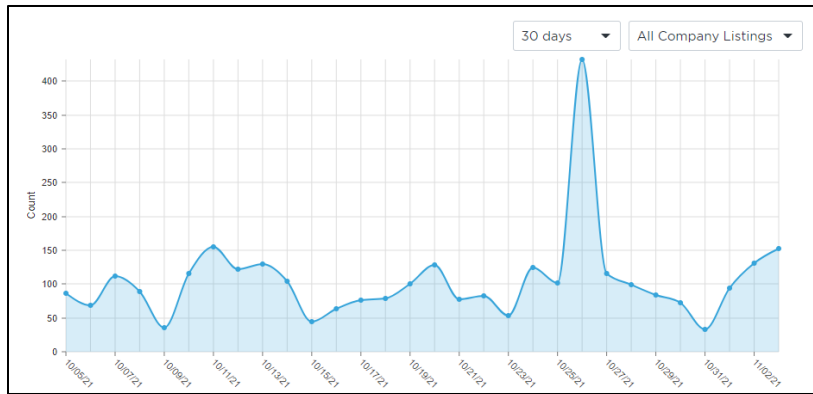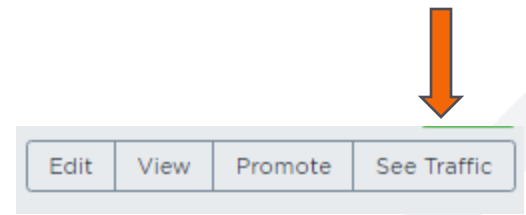
Views:

The total number of views on your listings

Locations:

Where your listings are being viewed.

Sources:

The website your listing is being view from.