

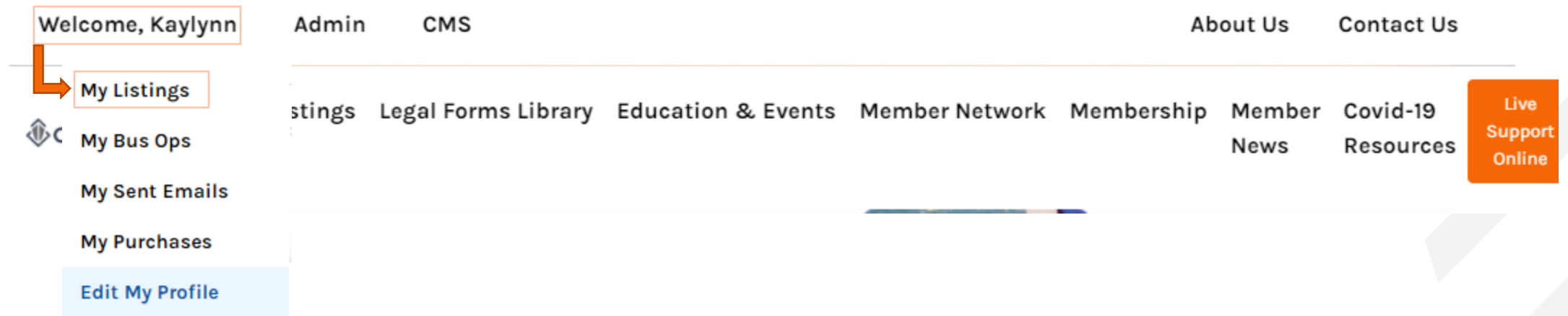


LISTING MANAGEMENT

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.

The screenshot shows the Catylist dashboard interface. At the top, there is a navigation bar with links for Search, Lists, Reports, Email, My Listings, and Help. The user is logged in as 'CBA Instructor'. The main content area is titled 'Hello, CBA Instructor' and contains several sections:

- Search:** A search bar with the placeholder 'Search by keyword...'. Below it are three columns: 'Search Properties' (For Lease, For Sale, For Sale/Lease, New Listings (7 days), New Listings (30 days), All Properties), 'Search Transactions' (CBA CMA, Sold, Leased), and 'Saved Searches' (Webinar 10/22, Webinar 4.30, Webinar 5/27, Training 7/29, More options...).
- My Listings:** A section with a sub-header 'My Listings' and three links: 'Add a Listing', 'Manage my Listings', and 'View Traffic'.
- Broadcast Email:** A section with three links: 'Send a Listing Broadcast', 'Post a Need/Want', and 'Adjust my Email Preferences'.
- Reports:** A section with two links: 'Generate a Report' and 'Download Quarterly Reports'.
- Help:** A section with three links: 'Tutorials & Guides', 'View my Profile', and 'Change Email/Password'.
- Commercial Exchange:** A section with the text 'Keep an eye out for leads from Commercial Exchange' and 'Your listings are getting free exposure on Catylist's national listing marketplace.' Below this are two buttons: 'Learn More' and 'Share Profile'.

At the bottom of the dashboard, there are links for 'Terms of Use', 'Privacy Policy', 'Do Not Sell My Personal Information', and a copyright notice '© 2001-2021 Catylist.'.



ADDING A LISTING

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

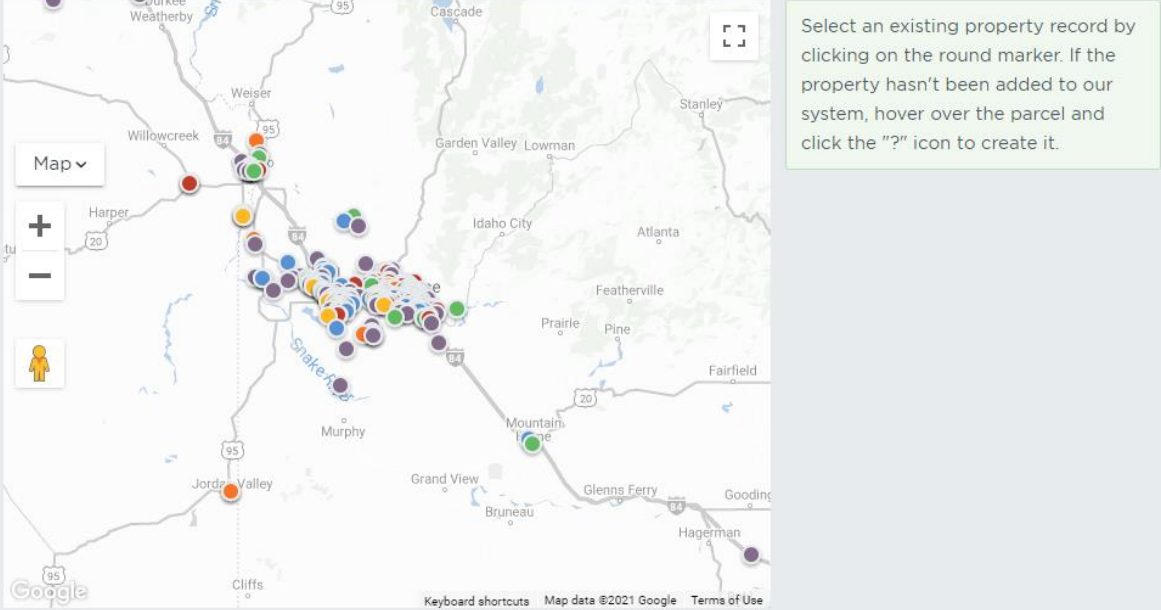
If you choose to add a listing via the quick link on your dashboard or on your My Listings page, you will open to the search by property address screen. All listings must be attached to an existing property record so you must first begin by searching for the property to attach your listing to.

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:

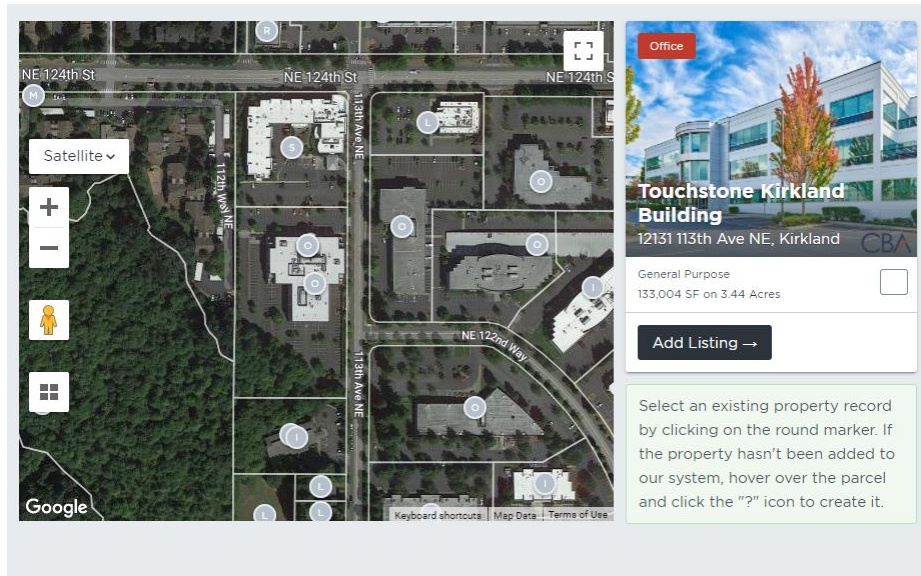




You can also choose to add a listing via the search map if you choose to do so, this is just the most common way to add a listing – to view this method please watch the add a listing video on our YouTube channel.

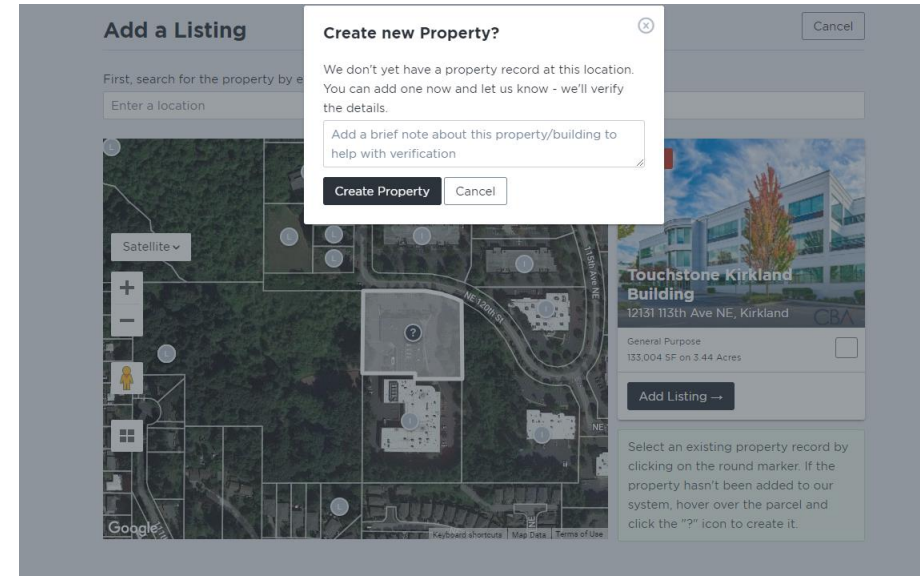
ADDING A LISTING

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.

If this is the case jump to page 12



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.

ⓘ We found an existing property record at that address

Please look over the information to ensure it accurately reflects the property you're marketing.

Does everything look good?


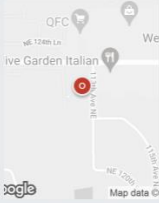

[Create new listing](#)

Need to change something?

[Edit the property record](#)

Touchstone Kirkland Building Office

12131 113th Ave NE, Kirkland, WA 98034



1 photo

Location

Address **12131 113th Ave NE, Kirkland, WA 98034**

County **King** Submarket **CBA Kirkland**

Parcels **2926059156** Cross Street **124th St**

Building Size

Building Size **133,004 SF** Office Space **91,378 SF**

Rentable Space **91,378 SF** Largest Contiguous **4,235 SF**

Total Available Space **9,487 SF**

Building Details

Type **Office**

Number of Buildings **1** Occupancy Type **Multi-tenant**

Percent Occupied **—** Building Class **A**

Building Status **Existing** Floors **3**



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.

Property/Building Listings View All Listings Back

Add New Listing Property Address: 12131 113th Ave NE, Kirkland, WA 98034

Search fields by name...

Basic Listing Information

Listing Type: For Lease Title: []

Status: Available Change Status Specific Address: []

Primary Use: Office Specific City: []

Secondary Uses: [] Floor: []

Current Uses: [] Suite: []

Investment: [] Tags: #tag1 #tag2

Owner Occupie...: Yes No List Date: M/DD/YYYY

Is Vacant?: [] Expiration Date: M/DD/YYYY

Vacant Date: M/DD/YYYY Available Date: M/DD/YYYY

Condo: Yes No Possession: []

Condo Fee Desc: []

Physical Characteristics

Total Available: # SF or Acres Parking Ratio: []

Property: 133.004 SF Restrooms: #

Divisible: [] # SF or Acres Offices: # []

Entire Floor: Yes No Yard: [] []

Load Factor: [] Fenced: []

Total Parking: Total Paved: []

Covered Parking: Covered

Uncovered Parki...: Uncovered

Lease Information

Asking Rent: \$Min-Max \$/SF/Y Rent Esc. Desc.: []

Negotiable Annual Taxes: \$

Lease Type: [] Tax Year: YYYY

Expenses: \$ PSF Signage: []

Expense Type: [] Exclusive Agency: Yes No

Fill in fields



ADDING A LISTING

Listing input – New features, tips and tricks

Vacant Date
Enter the date on which the space became vacant.

Vacant Date

Condo Yes No

Condo Fee Desc.

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.

Listing Agents

Primary Agent Company: Commercial Brokers Associ

Secondary Agent Company: x

Add Tertiary Agent Commercial Brokers Association

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

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.

Search fields by name...

- Basic Information
- Physical Characteristics
- Lease Information
- Utilities
- Comments
- Tenants
- Agents
- Media

Cancel Save

Asking Rent : ▾

Negotiable

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.

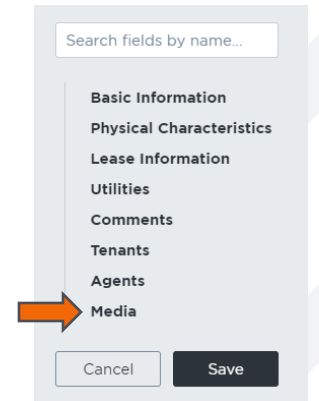
Listings Fields

- 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 " Co mmission 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



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

Add a floorplan or flyer to your listing

A screenshot of the "Files" section of the listing input form. It contains two buttons: "Upload Flyer PDF" and "Upload Floorplan Image".

Upload associated website links and videos to your listing.

Links / Videos

A screenshot of the "Links / Videos" section of the listing input form. It contains one button: "Add Link".

Replace the image attached to the property record.

A screenshot of the "Default Property Photo" and "Listing Photos" sections of the listing input form. The "Default Property Photo" section shows a placeholder image of a modern building with a "Submit Replacement" button below it. The "Listing Photos" section shows a "Drag to reorder" instruction and an "Edit Photos" button.

Add and arrange additional listing images.



ADDING A LISTING

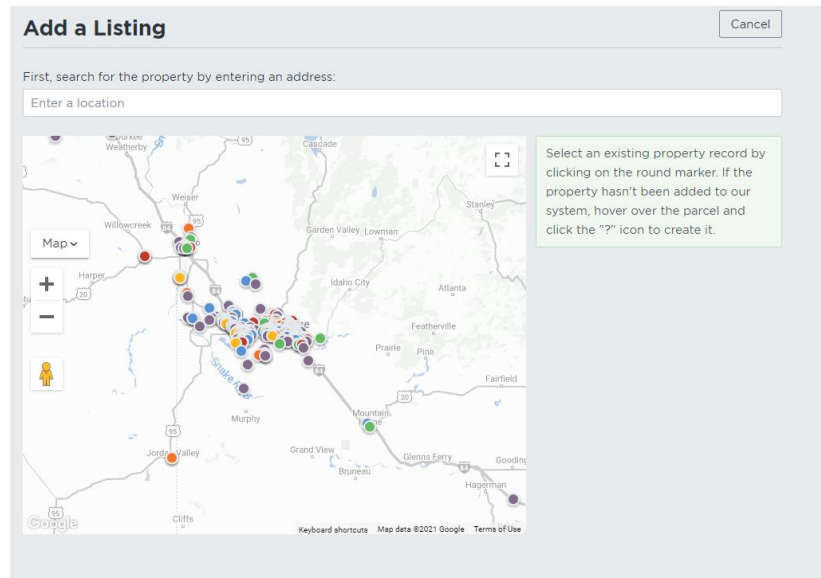
Listing input – Guidelines for additional media

- 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



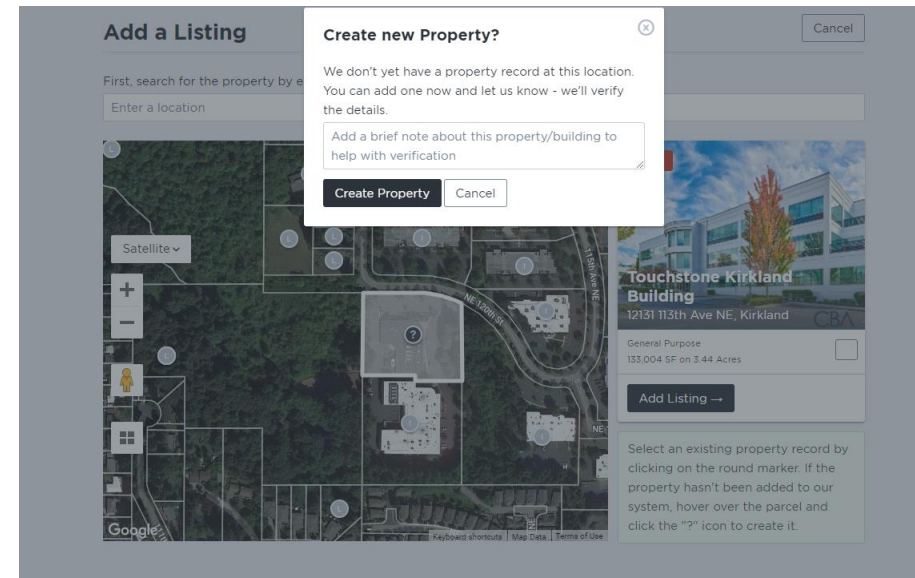
CREATING A PROPERTY RECORD

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

Property/Building Listings View All Listings Back

Add New Listing Property Address: 11311 NE 120 St, Kirkland, WA 98034

Search fields by name...

Basic Information
Physical Characteristics
Industrial Information
Lease Information
Utilities
Comments
Tenants
Agents
Media

Cancel Save

New property created. A new property was successfully created. Listing details can be entered below.

Basic Listing Information

Listing Type	For Lease	Title	
Status	Available Change Status	Specific Address	
Primary Use	Industrial	Specific City	
Secondary Uses		Floor	
Current Uses		Suite	
Investment		Tags	#tag1 #tag2
Owner Occupie...	<input type="radio"/> Yes <input type="radio"/> No	List Date	M/DD/YYYY
Is Vacant?		Expiration Date	M/DD/YYYY
Vacant Date	M/DD/YYYY	Available Date	M/DD/YYYY
Condo	<input type="radio"/> Yes <input type="radio"/> No	Possession	
Condo Fee Desc.			



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

Property/Building Listings Add Listing View All Listings Back

11311 NE 120 St, Kirkland, WA 98034 Industrial

Search fields by name...

Basic Property/Building Information

Name: 11311 NE 120 St Building Status: Existing

Type: Industrial Building Class: [dropdown]

Sub Type: Flex/R&D Condominiumized: Yes No

Location

Street Number: 11311 Street Max: County: King

Street Name: NE 120 St Submarket: CBA Kirkland

Save

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

Property/Building Listings Add Listing View All Listings Back

11311 NE 120 St, Kirkland, WA 98034 Industrial

Search fields by name...

Basic Property/Building Information

Name: 11311 NE 120 St Building Status: Existing

Type: Industrial Building Class: [dropdown]

Sub Type: [dropdown] Condominiumized: Yes No

Location

Street Number: 11311 Street Max: County: King

Street Name: NE 120 St Submarket: CBA Kirkland

Postal Code: 98034 Center/Park Na...

Building Details

Building Size: 18,680 SF Restrooms: #

Rentable Space: # SF Year Built: 1991

Office SF: # SF Year Renovated: YYYY

Industrial SF: # SF Reno. While Occu: Yes No

Retail SF: # SF Const. Timeframe: [dropdown]

Residential SF: # SF Primary Const: [dropdown]

Industrial Office SF: # SF Energy Star Cert: Yes No

Industrial Shell SF: # SF LEED Level: [dropdown]

Mezz. Office SF: # SF Elevators: #

Save

Building Size
Enter the total, gross floor area for this property, measured in square feet.
Note: This value can be modified but it cannot be removed.

To save your changes, you must include all required data:

- Occupancy Type is missing
- Number of Buildings is missing
- Sub-category is missing

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 with the missing information will also be highlighted in red.

Property/Building Listings Add Listing View All Listings Back

11311 NE 120 St, Kirkland, WA 98034 Industrial

Search fields by name...

Confirm changes
Are you sure you want to submit?
You're submitting an official change. Customizations you make will be verified by our research team and then updated in the public database. In the meantime, your changes will be visible only via your account and included in reports you generate.

Cancel Submit

Basic Property/Building Information

Name: 11311 NE 120 St Building Status: Existing

Type: Industrial Building Class: [dropdown]

Sub Type: Flex/R&D Condominiumized: Yes No

Location

Street Number: 11311 Street Max: County: King

Street Name: NE 120 St Submarket: CBA Kirkland

Save

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.



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 with 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.

Listing tools

Expand the listings at a specific property

Add a listing

Download your inventory report

The properties you have listings at

Location ▾ Type (4) ▾ Price/Size ▾ More (1) ▾ Keyword 🔍 Clear 7 properties 13 spaces

Listings for CBA Instructor Verify Listings View Traffic Expand All Sorting by Modified Date ▾

Add a Listing Download Inventory Report

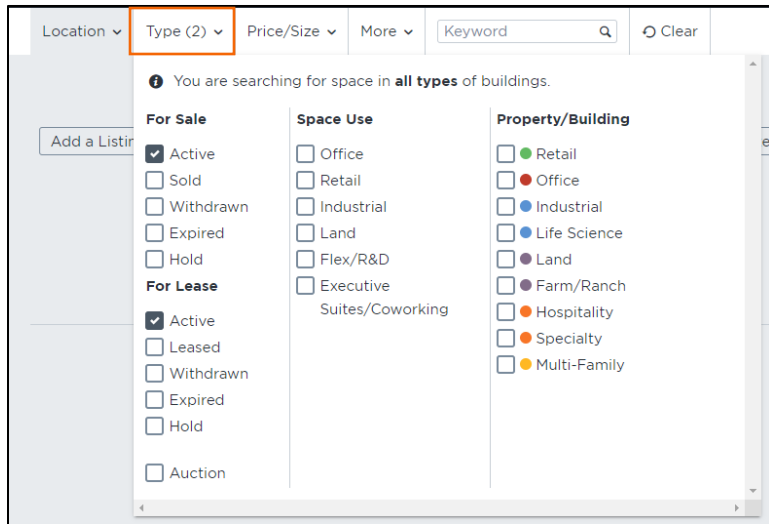
	Touchstone Kirkland, WA 12131 113th Ave NE, Kirkland, WA	Office Existing Bldg status	9,487 SF Total Available 133,004 SF Building 3.44 Acres Land	Hide 3 Spaces ▾ Incomplete Edit View Promote See Traffic
	Suite 2 1,000 SF	Office For Lease CBA TestAgent		Incomplete Edit View Promote See Traffic
	Office For Sale (Hold) CBA TestAgent		Unreported Price	Edits Submitted Hold Edit View Add Space
	12011 113 Ave NE 12011 113 Ave NE, Kirkland, WA	Land Existing Bldg status	0.22 Acres Land TL 10A Zoning	Show 1 Space ▾
	12007 113 Ave NE 12007 113 Ave NE, Kirkland, WA	Land Existing Bldg status	0.28 Acres Land TL 10A Zoning	Show 1 Space ▾
	, Troy, MT	Land	9.71 Acres Land	Show 3 Spaces ▾
	12131 113th Ave NE 12131 113th NE, Kirkland, WA	Office General Existing Bldg status	1,110 SF Total Available 99,269 SF Building 3.44 Acres Land	Show 3 Spaces ▾
	297 Overdale Lodge Rd 297 Overdale Lodge, Troy, MT	Land Existing Bldg status	1 Acre Land	Show 1 Space ▾
	Big Tail Rd Big Tail, Cle Elum, WA	Land	26.09 Acres Land	Show 1 Space ▾

7 Results Prev 1 Next

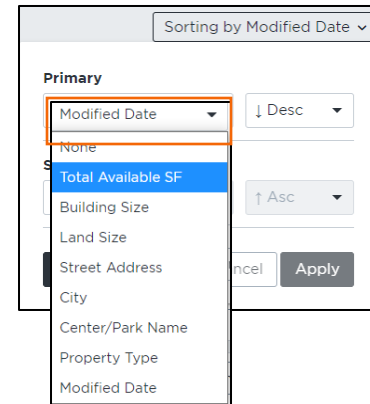


LISTING MANAGEMENT

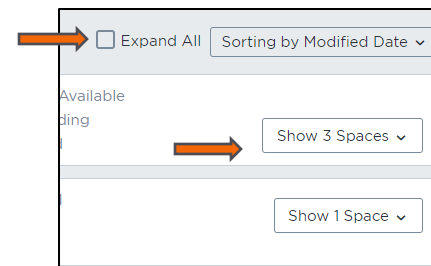
My Listings Page – Quick Tips and Tricks



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.



Choose the way in which the listings on your My Listings page are sorted.



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.

Property Name	Property Type	Status	Address	Details	Actions
Touchstone Kirkland Building	Office	Existing Bldg status	12131 113th Ave NE, Kirkland, ...	10,387 SF Total Available	Hide 3 Spaces ^
				133,004 SF Building	
				3.44 Acres Land	
900 SF	Office For Lease		CBA Instructor	Negotiable	Active Edit View Promote See Traffic
Suite 2	Office For Lease		CBA TestAgent		Incomplete Edit View Promote See Traffic
1,000 SF	Office For Lease		CBA TestAgent		Incomplete Edit View Promote See Traffic
Add Space					
12007 113 Ave NE	Land	Existing Bldg status	12007 113 Ave NE, Kirkland, ...	0.28 Acres Land	Show 1 Space v
				TL 10A Zoning	

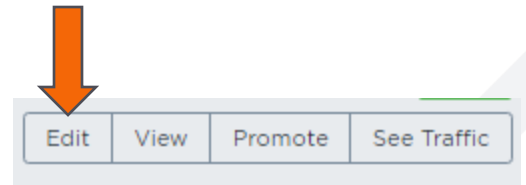


LISTING MANAGEMENT:


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.



Property/Building Listings Add Listing View All Listings Back

 **About this Listing**
Active Public
[See details](#)

12131 113th Ave NE, Kirkland, WA 98034
Office For Lease CBA Test Listing 900 SF

View Promote See Traffic Verify Duplicate Remove Listing

Search fields by name...

Basic Listing Information

Basic information
Physical Characteristics
Lease Information
Utilities
Comments
Tenants
Agents
Media

Cancel Save

Status	Available Change Status	Title	CBA Test Listing
Primary Use	Office	Specific Address	
Secondary Uses		Specific City	
Current Uses		Floor	
Investment		Suite	
Owner Occupie...	<input type="radio"/> Yes <input checked="" type="radio"/> No	Tags	#tag1 #tag2
Is Vacant?	Yes	List Date	7/07/2020
Vacant Date	M/DD/YYYY	Expiration Date	7/07/2021
Condo	<input type="radio"/> Yes <input type="radio"/> No	Available Date	M/DD/YYYY
Condo Fee Desc.		Possession	

Physical Characteristics

Total Available	900 SF	Parking Ratio	
Property	133,004 SF	Restrooms	#
Divisible	# SF or Acres	Offices	#
Entire Floor	<input type="radio"/> Yes <input type="radio"/> No	Yard	
Load Factor		Fenced	
Total Parking	Total	Paved	
Covered Parking	Covered		
Uncovered Parki...	Uncovered		



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

The screenshot shows a web interface for listing management. At the top, there are three tabs: 'Property/Building', 'Listings', and '+ Add Listing'. To the right of these tabs are two buttons: 'View All Listings' and '← Back'. Below the tabs, there is a property image of a modern office building. Underneath the image is the address '12131 113th Ave NE, Kirkland, WA 98034'. Below the address is a dropdown menu showing 'Office For Lease CBA Test Listing 900 SF'. Underneath the dropdown menu are several buttons: 'View', 'Promote', 'See Traffic', 'Verify', 'Duplicate', and 'Remove Listing'. To the right of the main content area, there is a section titled 'About this Listing' which includes a green 'Active' status, a 'Public' privacy setting, and a '+ See details' link. Below this section is a 'Listing Details' box with a table showing the current status and privacy settings.

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

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.

View details regarding the status of your listing

Listing Details	
Active	Listing is active.
Public	Listing is publicly visible.



LISTING MANAGEMENT:

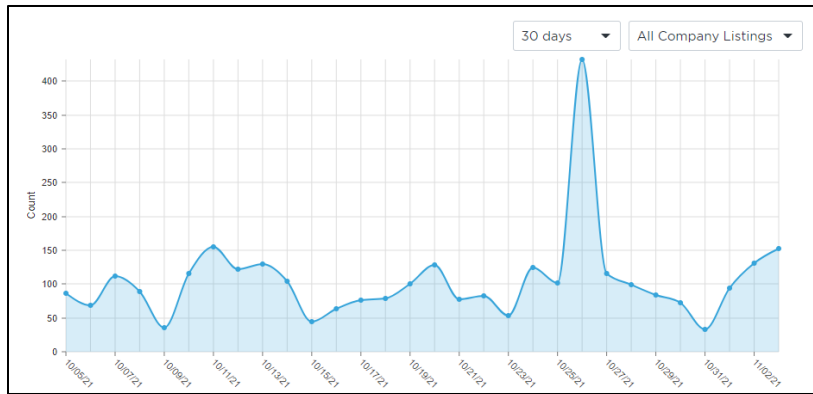
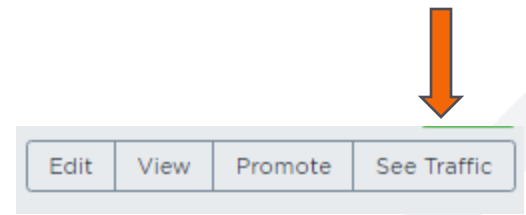
Editing your listing – Sold listing record guidelines

- 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 and 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?



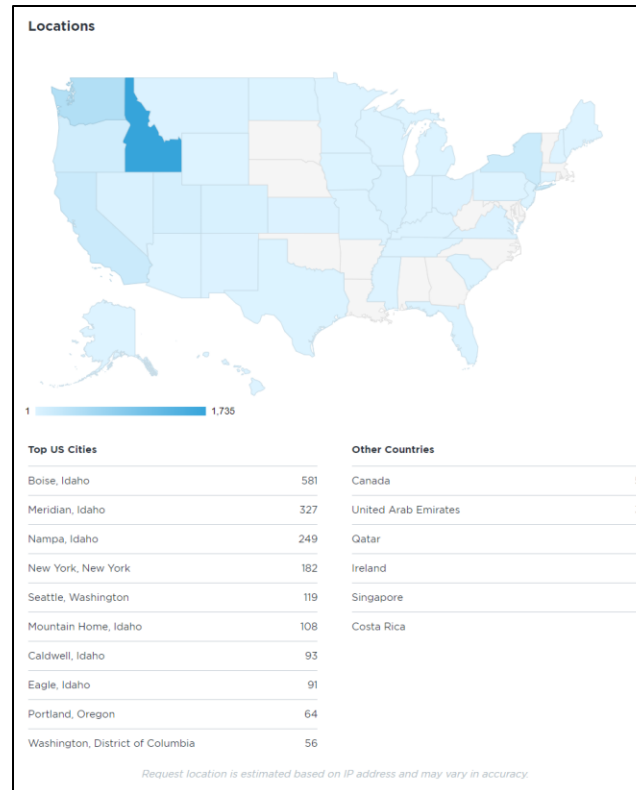
LISTING MANAGEMENT:

Managing your listings – View Traffic



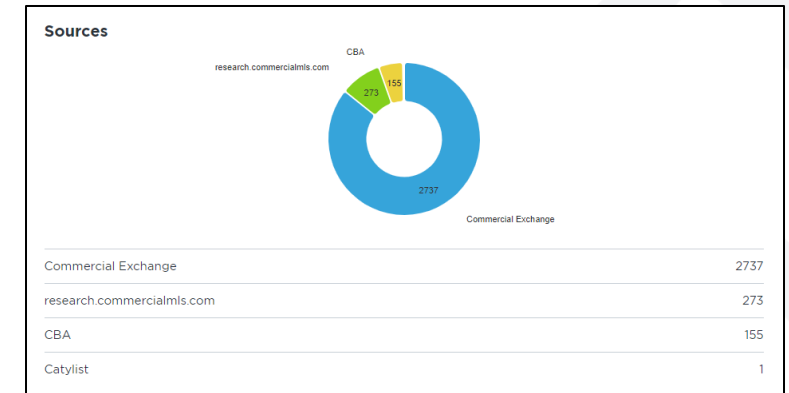
Views:

The total number of views on your listings



Locations:

Where your listings are being viewed.



Sources:

The website your listing is being view from.

