



DASHBOARD AND PROFILE BENEFIT OVERVIEW

In this how to guide we will cover how to use the toolbar and user dashboard as well as how to access and share your public profile.

ACCESSING THE LISTINGS PLATFORM AND PERFORMING SEARCHES

Once you have logged into the CBA main page you can access your searching and listing management tools via three different access points:

If you would like to edit or manage your sale/lease listings you would want to select **“My Sale/Lease Listings”** from the dropdown menu that appears under **“Welcome, Name”**

If you would like to log directly into the search map you can select the orange **“Search Commercial Listings”** button on the CBA homepage.

If you would like to just access the Catylist main page you can select the light blue **“Catalist Dashboard”** on the CBA homepage.

The screenshot shows the CBA homepage interface. At the top left, a user is logged in as 'Welcome, Kaylynn', with 'Admin' and 'CMS' links nearby. Below this is the CBA logo and a navigation menu with items: 'Research & Listings', 'Legal Forms Library', 'Education & Events', 'Member Network', and 'Membership'. A dropdown menu is open under 'Welcome, Kaylynn', listing: 'My Sale/Lease Listings', 'My Bus Ops', 'My Purchases', 'Manage Account', 'API', and 'Logout'. An orange arrow points to the 'My Sale/Lease Listings' option. Below the navigation is a large banner with the text 'HELPING MEMBERS INCREASE SUCCESS AND RAISE THE STANDARD OF PRACTICE'. Underneath the banner are three buttons: 'Search Commercial Listings' (orange), 'Search Business Opportunities' (dark blue), and 'Catalist Dashboard' (light blue). Two orange arrows point upwards to the 'Search Commercial Listings' and 'Catalist Dashboard' buttons respectively.



NAVIGATING THE TOOLBAR

Once you've followed the steps to access the listings platform you will have access to the below toolbar.

This toolbar will appear no matter which access point you used, and you can use the toolbar to jump directly into the different areas of the listing platform.



*Quickly jump into a specific search type

Note: If you do not see this button that means you do not currently have any active listings. If this is the case, you will need to access the "My Listings" page via the profile tools dropdown menu. See page 5 for where to find this.



THE DASHBOARD

How to use your dashboard

If you selected “Catylist Dashboard” on the homepage or **MOODY'S** on the blue toolbar once the listings platform has launched, you will be taken to your dashboard. The dashboard consists of several quick links to help make your user experience easier than ever!

Quick links into searches for active listings, closed transactions, and your saved searches.

Quick links into adding a listing, managing your listings, and viewing the traffic of your listings.

Quick links to send e-mails and adjust your system e-mail preferences.

The screenshot shows the dashboard for 'CBA Instructor' powered by 'MOODY'S'. The top navigation bar includes 'Search', 'Lists', 'Reports', 'Email', 'My Listings', and 'Help'. The main content area is titled 'Hello, CBA Instructor' and features several sections: 'Search' with a search bar and filters for Properties, Transactions, and Saved Searches; 'My Listings' with options to add, manage, view traffic, and view leads; 'Broadcast Email' with options to send a listing broadcast and post a need/want; and 'Reports' with options to generate a report and download quarterly reports. On the right side, there is a 'Help' section with links to tutorials, profile, and password change, and a 'Manage Photos' video player. At the bottom right, there are 'Learn More' and 'Share Profile' buttons. An orange arrow points to the user profile icon in the top right corner.

Profile tools:
View your listings and public profile



PROFILE TOOLS: VIEWING AND SHARING YOUR PUBLIC PROFILE

To view your listings, your office information or your public profile you can click on the profile navigation on the upper right-hand side of the page.

