

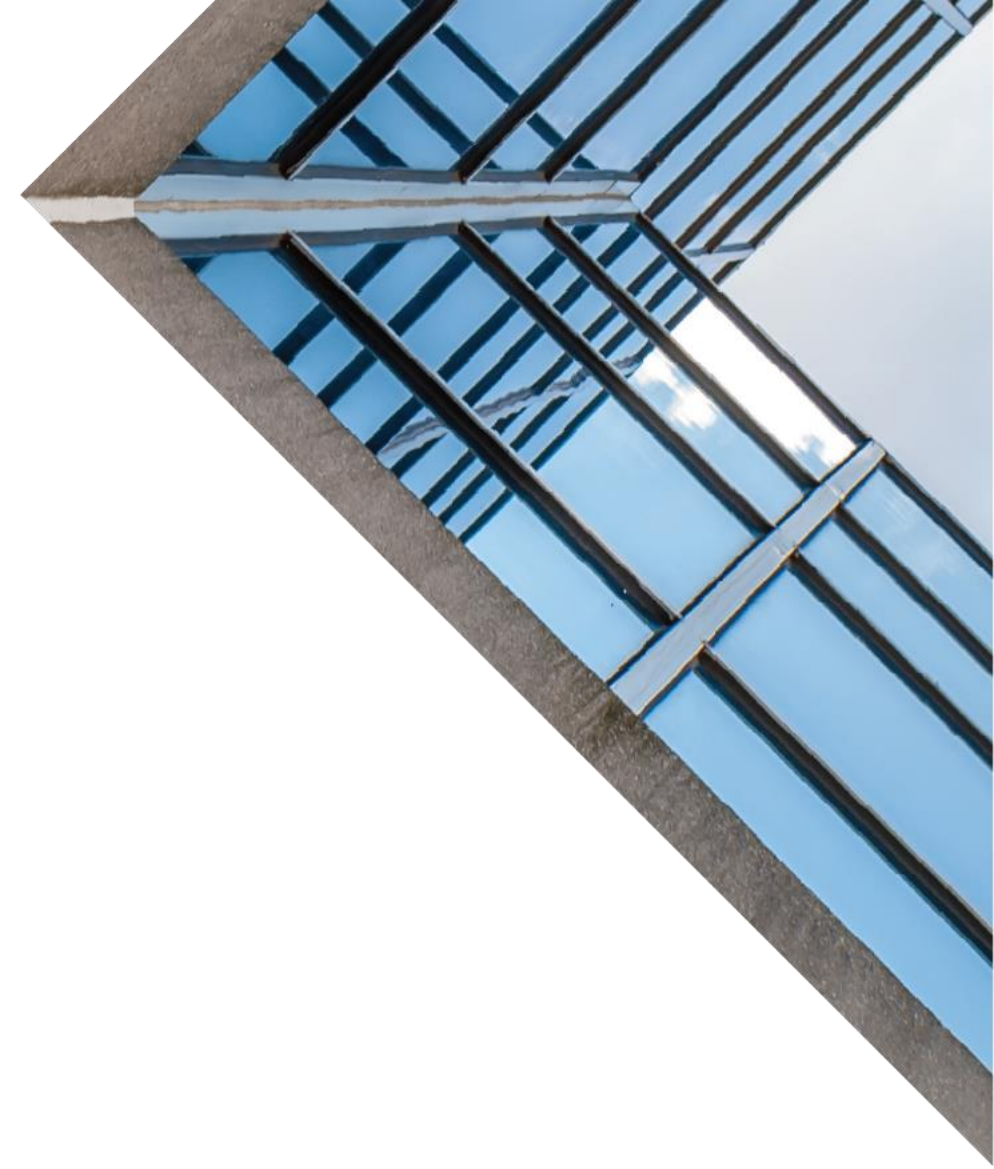


# MANAGING EXISTING LISTINGS AND PROPERTY RECORDS

In this guide we will review how to edit your sale/lease listings and existing property records.

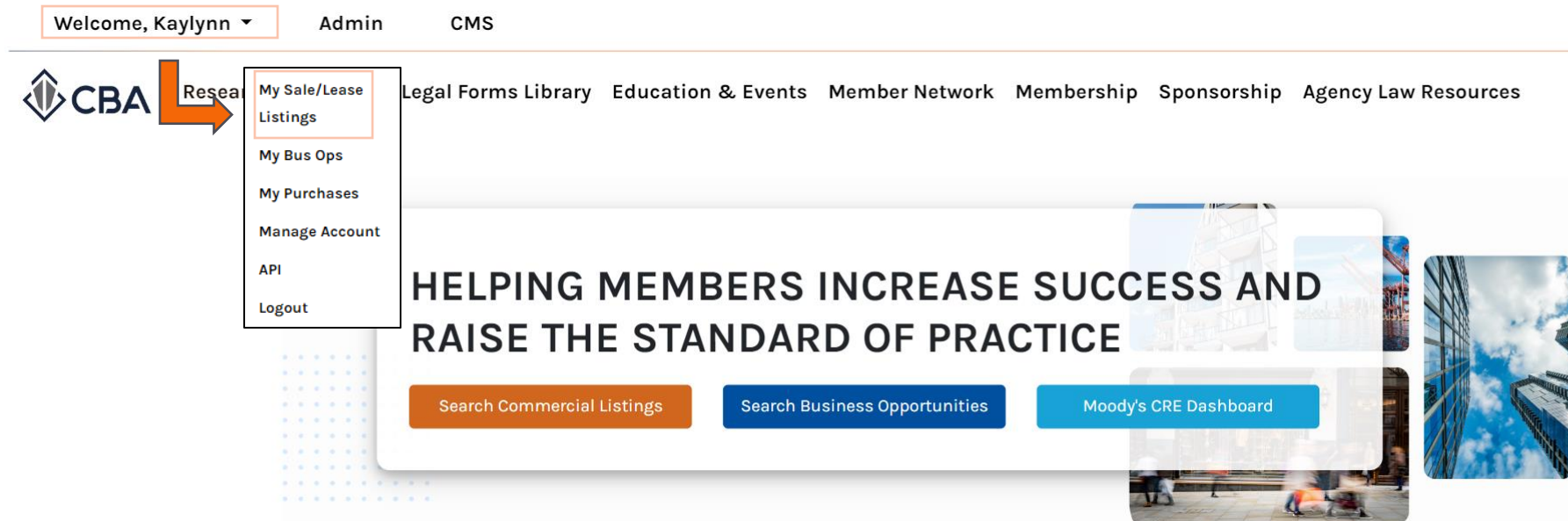
# TABLE OF CONTENTS

1. Locating Your Listings	<u>3</u>
2. My Listings Page	<u>4</u>
3. Manage Your Listings	<u>6</u>
4. Edit Your Listings	<u>8</u>
5. Listing Management	<u>10</u>
6. Property Record Management	<u>15</u>



# LOCATING YOUR LISTINGS

## How to access your sale and lease listings



To access your listing inventory, click on "Welcome, NAME" on the upper left-hand side of the CBA homepage.

Once the dropdown menu appears select "My Sale/Lease Listings", this will take you into your My Listings page.



# NAVIGATING THE MY LISTINGS PAGE

Apply filters to search through your active and off-market listings

Verify your listings are accurate

Download your inventory report

See who has viewed your listing

View the traffic for all of your listings

Add a new listing

Filter your listings by status

Properties your listings are attached to

Sort your listings by different criteria to navigate your My Listings Page

Listing management tools

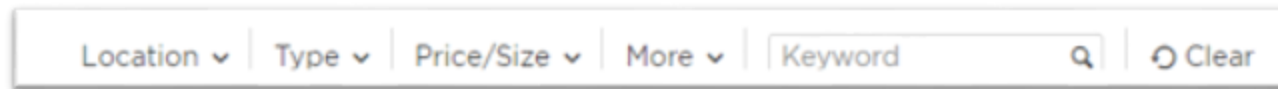
Expand the listings for a specific property

The screenshot shows the 'My Listings' interface. At the top, there's a search bar with filters for 'Listings/Comps', 'Location', 'Type', 'Price/Size', and 'More'. A 'Keyword' search field and a 'Clear' button are also present. Below the search bar, there's a '+ Add a Listing' button. To the right of this button are 'Verify Listings', 'Export Listings', 'View Leads', and 'View Traffic' buttons. Below these buttons, there's a status filter section with checkboxes for 'Active' (checked), 'Leased', 'Sold', 'Withdrawn', 'Expired', and 'Hold'. To the right of the status filters is an 'Expand All' checkbox and a 'Sorting by Modified Date' dropdown. The main area displays two listing cards. The first card is for 'Speciality Test' at '111 - 112 N Test St SW', showing '13 SF' and 'Office General Existing Bldg status'. The second card is for 'Test' at '12133 113th Ave NE', showing '0 SF' and 'Office General Existing Bldg status'. Both cards have 'Bulk Edit', 'Manage Flyers', and 'See Traffic' buttons. The first card also has a 'Hide 1 Listing' button, and the second card has a 'Show 1 Listing' button. A 'Private' lock icon is visible on the first card. At the bottom right, there's an 'Add Listing' button.



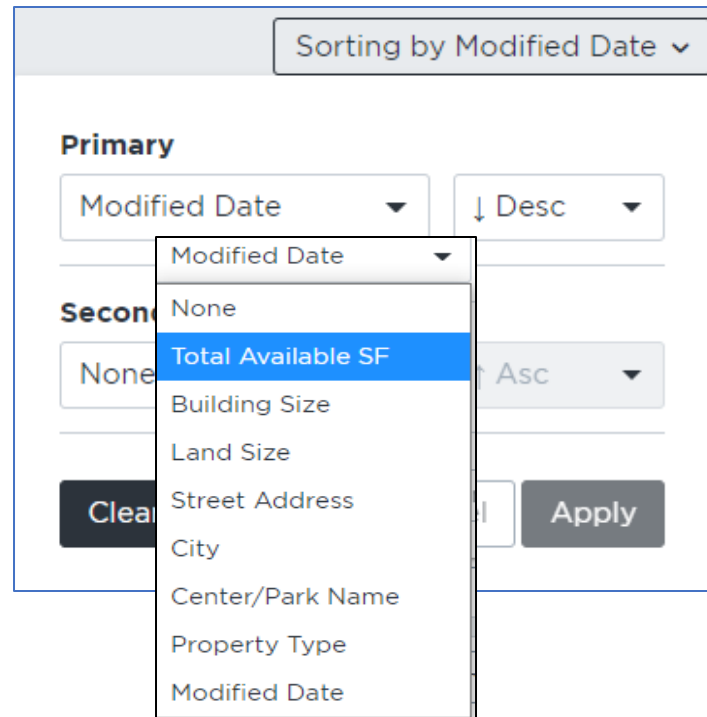


# TIPS & TRICKS – SORT AND FILTER THROUGH YOUR LISTINGS



Location ▾ | Type ▾ | Price/Size ▾ | More ▾ | Keyword

Apply search filters using the top white navigation bar to quickly locate an active or off-market listing. These filters look like the filters from the search map, but only search through your listing inventory when you are in the My Listings screen.



Sorting by Modified Date ▾

**Primary**

Modified Date ▾ ↓ Desc ▾

**Secondary**

None ▾ Asc ▾

Clear

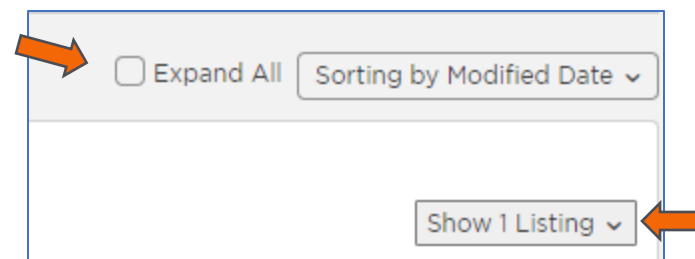
- Modified Date
- None
- Total Available SF
- Building Size
- Land Size
- Street Address
- City
- Center/Park Name
- Property Type
- Modified Date

Determine which sorting method you would like to organize your listings by. You will be able to assign a primary and a secondary sorting method.



# MANAGE YOUR LISTINGS

All your listings are condensed into the property they are attached to. You can choose to **Expand All** to extend your view of the listings you have at every property. To view your listings within one specific property, click the **Show # Listing(s)** button.



After you've expanded the property view to include your listings, you will have access to the following listing management tools:

**Edit** takes you into the update for listing screen

**View** shows your public listing link

**Promote** allows you to generate a listing report and access the public listing link to share

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

**Add Listing** you can use this to skip searching for a property when adding a listing to a property you've already got listings at.

A screenshot of a listing management interface. The listing is titled 'Speciality Test' and is located at '111 - 112 N Test St SW'. It is an 'Office' listing with a 'General' status and 'Existing Bldg status'. The listing is '13 SF' and has '13 SF Total Available'. The building is '34,754 SF Building' and the land is '0.26 Acres Land'. The listing is 'Office For Lease' and is a 'CBA Instructor'. The price is '\$13.00 Annual/SF' and it 'Expires 11/20/2024'. The listing is 'Private'. There are buttons for 'Edit', 'View', 'Promote', and 'See Traffic'. There are also buttons for 'Bulk Edit', 'Manage Flyers', and 'See Traffic'. There is an 'Add Listing' button. A 'Hide 1 Listing' button is also visible.



# MANAGE YOUR LISTINGS

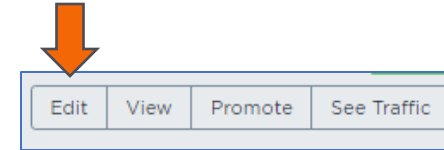
## Edit your listings

Once you click the edit button you will be taken to the update screen. From this screen you can toggle between three management screens which include:

**Property/Building** is where you will submit an official request to make changes to the property record.

**Listings** is where you will make changes to the information within your listing\*. You will also have access to some additional listing management tools here such as promoting a broadcast, verifying, and duplicating your listing record. Please see next page for more details on these tools.

**Add Listing** is how you would create a new listing at this property



Property/Building Listings **Add Listing** View All Listings Back

12131 113th Ave NE, Kirkland, WA 98034

Land For Lease CBA Test Listing 0.01 Acres

View Promote See Traffic Verify Duplicate Remove Listing

About this Listing  
Active Public  
See details

Search fields by name...

Basic Information  
Physical Characteristics  
Lease Information  
Comments  
Tenants  
Agents  
Media

Cancel Save

**Basic Listing Information**

Status Available Change Status Specific City

Primary Use Land

Secondary Uses

Current Uses

Investment

Owner Occupied Yes No

Title CBA Test Listing

Specific Address

Tags #tag1 #tag2

List Date 7/07/2020

Expiration Date 7/07/2021

Available Date M/DD/YYYY

Possession

**Physical Characteristics**

Total Available Property: 3.44 Acres 0.01 Acres

Divisible # SF or Acres

Entire Floor Yes No

Load Factor

Total Parking Total

Offices #

Yard

Fenced

Paved

Easements Yes No

\*Keep in mind that the Compensation Description is a locked field, to make a change to your compensation please e-mail [research@commercialmls.com](mailto:research@commercialmls.com) with changes needed as well as the reason for the change request.



# EDIT YOUR LISTINGS

## Navigating the edit screen

Make changes to the property record, for more information about updating property records go to page 14

Add a new listing to this property

Return to your My Listings page

Use this drop-down to toggle between your listings at this property record


Property/Building

Listings

+ Add Listing

View All Listings

Back



12131 113th Ave NE, Kirkland, WA 98034

● Office For Lease CBA Test Listing 900 SF

View

Promote

See Traffic

Verify

Duplicate

Remove Listing

About this Listing

Active Public

+ See details

Listing Details

Active Listing is active.

Public Listing is publicly visible.

Verify your listing

If you want to copy the current listing information into a new listing, click the “Duplicate” button and make the appropriate changes.



# EDIT YOUR LISTINGS

## Guidelines for updating your listings to sold (WA only)

- 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?

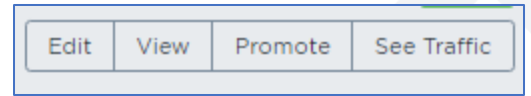


# LISTING MANAGEMENT

## View your listing

The view listing management tool takes you to a preview of your listing.


From this screen you can generate reports, share the URL link, return to the edit screen and view listing traffic details.



[Back](#) [View Listing Traffic](#)

### Touchstone Kirkland Building

12131 113th Ave NE, Kirkland, WA 98034



Office

1 photo

Land For Lease

0.01 Acres

Negotiable

Generate Report

Listing was last verified over 90 days ago

#### Listing Details

Asking Rate **Negotiable** Commission **0**

Total Available **0.01 Acres** List Date **7/07/2020**

Listing ID **6192a4abeae2ee000714f07c**

**CBA Test Listing**

PUBLIC COMMENTS TESTING

#### Space Details

Total Available **0.01 Acres** Primary Use **Land**

Contact Agent

Edit

Duplicate

Add to List

#### Property Highlights


Type **Office: General**

Size **133,004 SF, 3.44 Acres** Building Class **A**



Occupancy Type **Multi-tenant**

[View All Details](#) [Add to List](#)

#### Contact

 **CBA Instructor**  
Commercial Brokers A...  
[Contact This Agent](#)

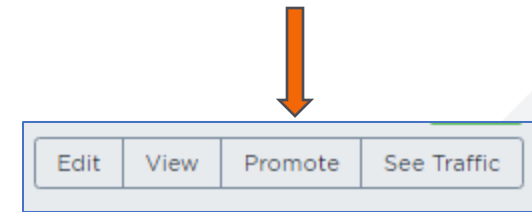
Contact Agent





# LISTING MANAGEMENT

## Promote your listing



The promote button has two features available for your listing:

Request a broadcast e-mail for your listing

Generate a listing report to share.

A screenshot of the 'Listings for CBA Instructor' interface. A modal titled 'Promote this listing' is open, showing options to 'Generate Report' and 'Request Broadcast'. The background shows a table of listings with columns for listing details and actions. The first listing is 'Touchstone Kirkland Building' at '12131 113th Ave NE, Kirkland, WA'. The modal is centered over the first listing. The background interface includes buttons for 'Add a Listing', 'Download Inventory', 'Verify Listings', 'View Leads', and 'View Traffic'. The table has columns for listing details and actions. The first listing is 'Touchstone Kirkland Building' at '12131 113th Ave NE, Kirkland, WA'. The modal is centered over the first listing. The background interface includes buttons for 'Add a Listing', 'Download Inventory', 'Verify Listings', 'View Leads', and 'View Traffic'. The table has columns for listing details and actions. The first listing is 'Touchstone Kirkland Building' at '12131 113th Ave NE, Kirkland, WA'. The modal is centered over the first listing.



# LISTING MANAGEMENT

## See Traffic

Edit

View

Promote

See Traffic



The See Traffic feature allows you to view the traffic for your individual listings and the listings within your entire office. You can view the traffic for the last 30 days, 90 days, one year or all time.

You have access to three different listing reports as well as the ability to view who has viewed your listing via the **View Leads** feature.

Listing Traffic for CBA Instructor

Download as Report

Manage My Listings

View Leads

☐ For my office

30 days

All Listings

30 days

30 days

90 days

1 year

All Time

All Listings

All Listings

Industrial For Lease Touchstone Kirkland Building

Office For Lease Touchstone Kirkland Building, Suite 2

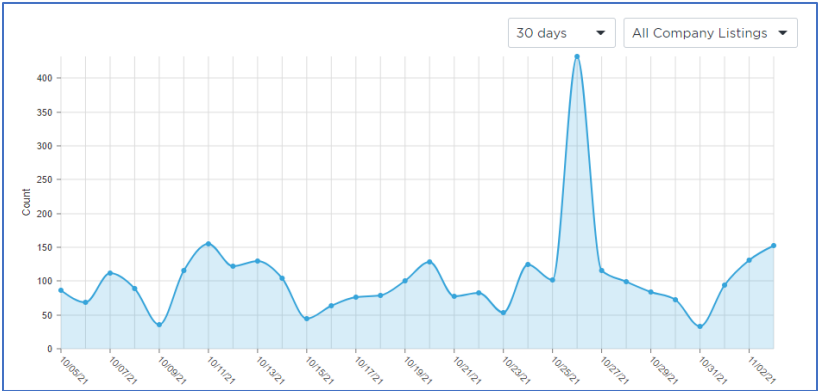
Land For Lease Touchstone Kirkland Building

Industrial For Lease Big Tail Road



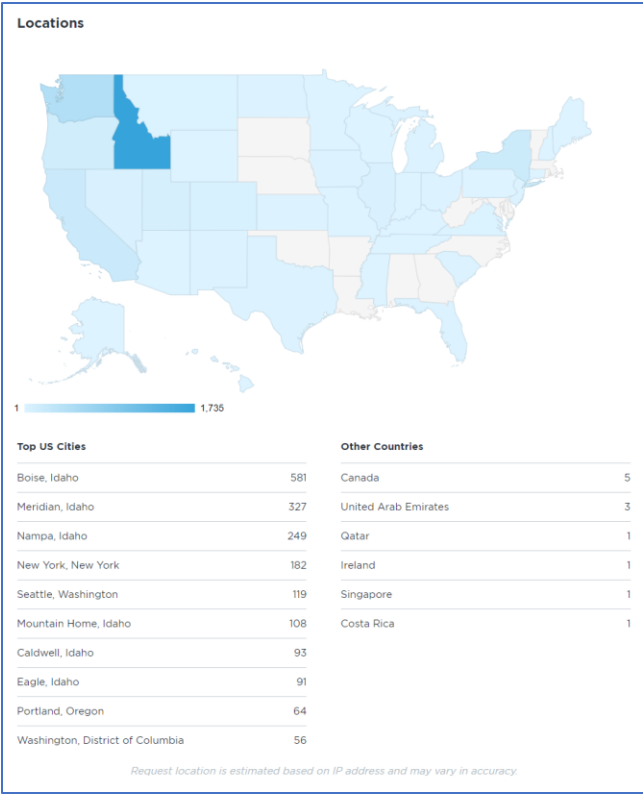
# LISTING MANAGEMENT

## See Traffic - Listing traffic reports



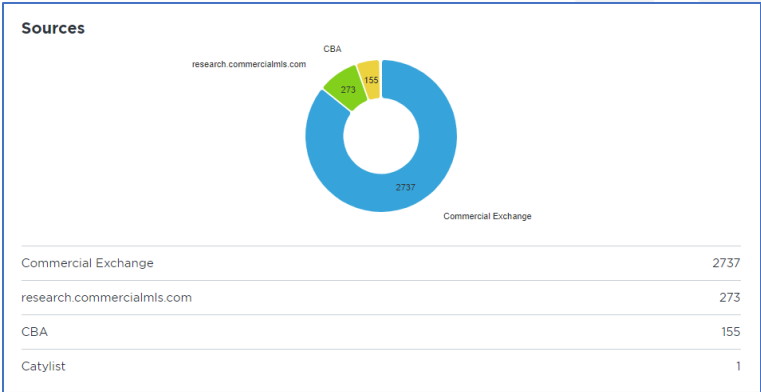
Views:

The total number of views on your listings by date



Locations:

Where your listings are being viewed.



Sources:

Where the link that your listing was opened came from



# LISTING MANAGEMENT

## See Traffic - View Leads

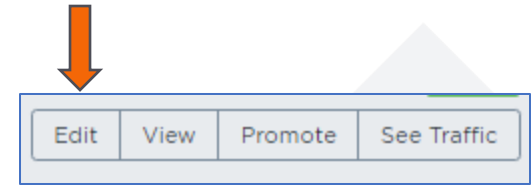
Listing Leads							
Not receiving email notifications <a href="#">Change This</a> <a href="#">Manage My Listings</a> <a href="#">View Traffic</a>							
<div>All Listings <span>▼</span></div> <div><input checked="" type="checkbox"/> Viewed <input checked="" type="checkbox"/> Saved <input checked="" type="checkbox"/> Downloaded Flyer <input checked="" type="checkbox"/> Viewed Contact Info <input checked="" type="checkbox"/> Emailed Agent <span>30 days ▼</span> <a href="#">Download CSV</a></div>							
12/20/2022	Property Name	Action Taken	Member Name	Office Name	E-mail Address	Phone Number	User Type
12/19/2022	Car Wash	Viewed on Catylist Resear...	First Last	Office Name	E-mail Address	Phone Number	User Type
12/19/2022	Property Name	Downloaded Flyer	.. Non-Member		E-mail Address	Phone Number	

When using the **View Leads** feature you will be able to see the date your listing was opened, which property was viewed, where the listing was opened from or which action was taken, you will be able to view the name and contact information of the user who opened your listing or downloaded your flyer if they were logged in or filled out the contact form.






# PROPERTY RECORD MANAGEMENT



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, click "Edit" on your listing and then click on Property/Building tab in the left corner to access the property details.

**Property/Building** Listings [Add Listing](#) [View All Listings](#) [Back](#)

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

Search fields by name..

**Basic Information**  
Location  
Building Details  
Land & Utilities  
Contacts  
Media

**Basic Property/Building Information**

Name	Touchstone Kirkland	Building Status	Existing
Type	Office	Building Class	A
Sub Type	General	Condominium...	<input type="radio"/> Yes <input checked="" type="radio"/> No

**Location**

Street Number	12131	Street Name	113th Ave NE	County	King	Submarket	CBA Kirkland
---------------	-------	-------------	--------------	--------	------	-----------	--------------

[Cancel](#) [Save](#)



# PROPERTY RECORD MANAGEMENT

If you 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 fields with the missing information will also be highlighted in red.

The screenshot displays the 'Property/Building' form for '12131 113th Ave NE, Kirkland, WA 98034'. The form is divided into several sections: Basic Information, Location, Building Details, and Rentable Space. The 'Basic Information' section includes fields for Name, Type, Sub Type, Building Status, Building Class, and Condominium. The 'Location' section includes Street Number, Street Name, Cross Street, Postal Code, County, Submarket, Campus Name, and Center/Park Name. The 'Building Details' section includes Building Size, Year Renovated, Reno. While O..., Const. Timefr..., Primary Const., Energy Star C..., LEED Level, Elevators, Heated, Air Conditioned, Sprinklers, and ESFR Sprinkle... The 'Rentable Space' section includes Rentable Space, Office SF, Industrial SF, Retail SF, Residential SF, Number of Un..., Number of Bu..., Floors, Floor Size, and Floor Size (Av...). The 'Sub Type' field in the 'Basic Information' section is highlighted in red, indicating it is a required field that is missing. An orange arrow points to the 'Sub Type' field. At the bottom of the form, a notification box states: 'To save your changes, you must include all required data: • Sub-category is missing'. Another orange arrow points to this notification box.

Property/Building Listings Add Listing View All Listings Back

12131 113th Ave NE, Kirkland, WA 98034  
Office

Search fields by name...

**Basic Information**  
Location  
Building Details  
Land & Utilities  
Contacts  
Media

Cancel Save

**Rentable Space**  
Enter the rentable area for this property, measured in square feet.  
Note: This value can be modified but it cannot be removed.

**Basic Property/Building Information**

Name Touchstone Kirkland Building Status Existing  
Type Office Building Class A  
Sub Type Condominium... Yes No

**Location**

Street Number 12131 Street Name 113th Ave NE County King  
Cross Street 124th St Submarket CBA Kirkland  
Postal Code 98034 Campus Name Center/Park Name

**Building Details**

Building Size 133,004 SF Year Renovated  
Rentable Space 91,378 SF Reno. While O... Yes No  
Office SF 91,378 SF Const. Timefr...  
Industrial SF # SF Primary Const. Masonry  
Retail SF # SF Energy Star C... Yes No  
Residential SF # SF LEED Level  
Number of Un... # Elevators Yes 1  
Number of Bu... 1 Heated Yes No  
Floors 3 Air Conditioned Yes No  
Floor Size Min-Max SF Sprinklers Yes No  
Floor Size (Av... # # SF ESFR Sprinkle... Yes No

To save your changes, you must include all required data:  
• Sub-category is missing

# PROPERTY RECORD MANAGEMENT

When all changes have been made, click save. A confirm changes pop-up window will appear where you can add a note for the CBA staff and select “Submit”. These changes will be need to be approved by CBA staff before they will appear on our public site or for other CBA members.

In the meantime, you will see the requested changes and will be able to create updated reports through your individual CBA log in.

CBA staff approves property change requests within 1-2 hours.

The screenshot displays a web application interface for managing property records. A modal window titled "Confirm changes" is overlaid on the main form. The modal contains a warning message in orange text: "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." Below this message is a text input field for a note and two buttons: "Cancel" and "Submit". The background form, titled "Property/Building", includes a search bar, a sidebar with navigation links (Basic Information, Location, Building Details, Land & Utilities, Contacts, Media), and a main section for entering property details. The "Location" section is visible, showing fields for Street Number (12131), Street Name (113th Ave NE), County (King), and Submarket (CBA Kirkland). There are also buttons for "Cancel" and "Save" at the bottom of the form.



# PROPERTY RECORD MANAGEMENT

## Requirements to keep in mind when editing 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
- 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

