

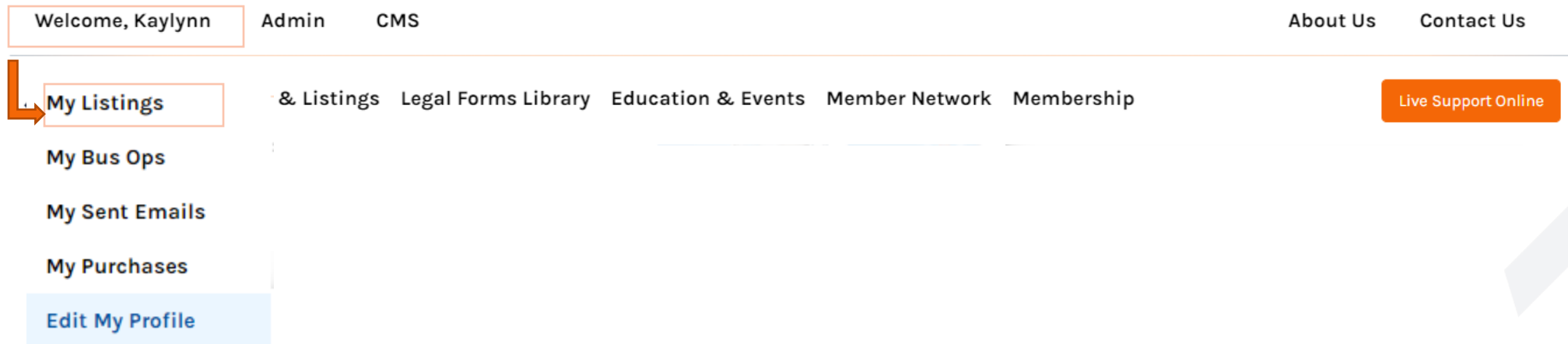


ADMIN DASHBOARD

In this guide, we will be reviewing the dashboard tools available to our admin users.

THE ADMIN DASHBOARD

Accessing your dashboard



To access your admin dashboard, you will want to click on “Welcome, NAME” once you have logged into your CBA account.

When the dropdown menu appears select “My Listings” and this will take you into your admin dashboard!



THE ADMIN DASHBOARD

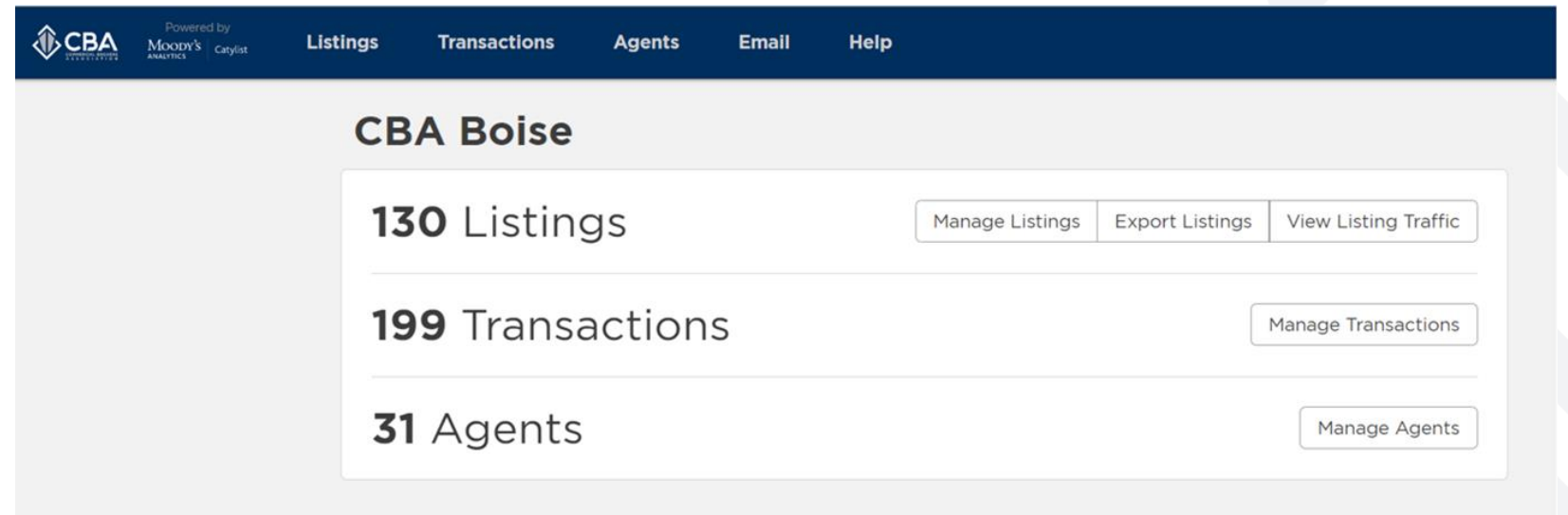
Getting familiar with your dashboard

After you have followed the steps to access your dashboard this is what your screen will look like. The dashboard is separated into three sections:

Listings view and manage your office's active and off-market listings.

Transactions view and manage your office's sold or leased listings.

Agents access the agents in your office to log in as the user and perform a search, open listing links, manage that agent's listings, or make an edit to their public profile.



The screenshot displays the CBA Boise Admin Dashboard. At the top, there is a dark blue navigation bar with the CBA logo on the left and the text "Powered by Moody's Analytics Citylist" in the center. To the right of the logo are navigation tabs for "Listings", "Transactions", "Agents", "Email", and "Help". Below the navigation bar, the main content area is titled "CBA Boise" and contains three summary cards. The first card shows "130 Listings" with buttons for "Manage Listings", "Export Listings", and "View Listing Traffic". The second card shows "199 Transactions" with a "Manage Transactions" button. The third card shows "31 Agents" with a "Manage Agents" button.

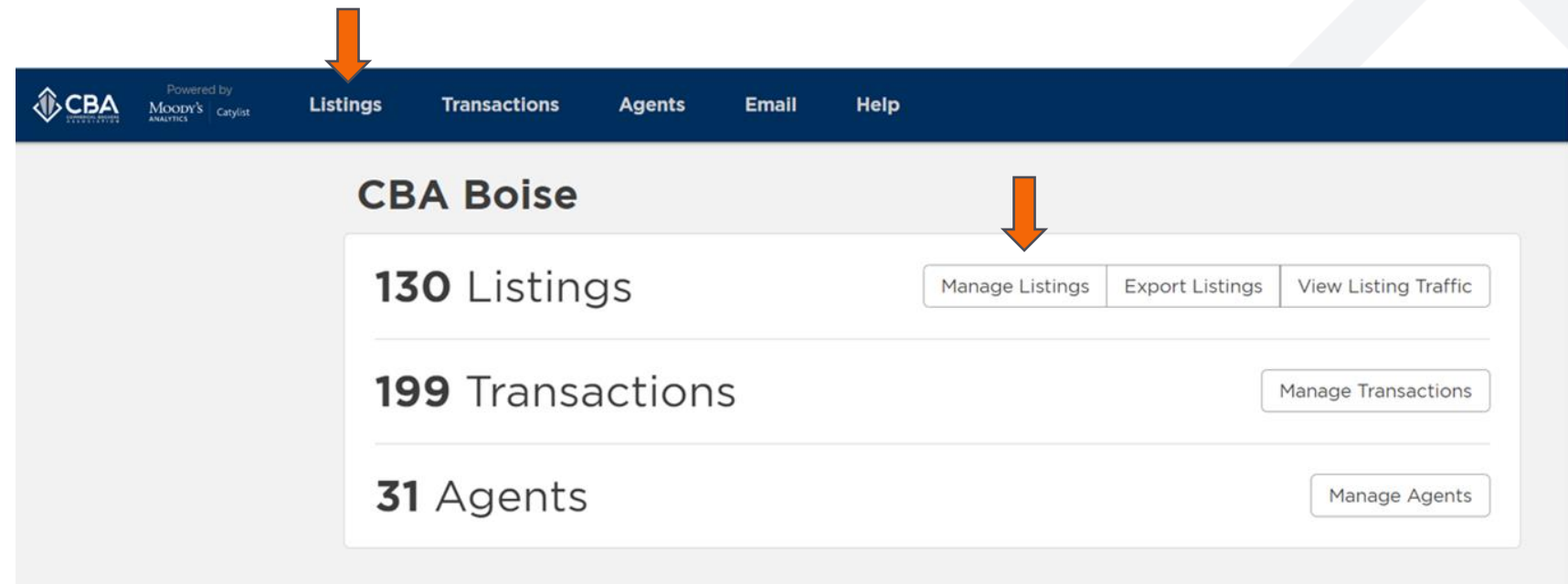


MANAGE LISTINGS

Accessing your office listings

You can access your office's active and off-market listings by selecting "**Listings**" on the toolbar.

You can also access them by selecting "**Manage Listings**" in the listings section of your dashboard.



The screenshot shows the CBA Boise dashboard interface. At the top, there is a dark blue navigation bar with the CBA logo, the text "Powered by Moody's Analytics Citylist", and menu items for "Listings", "Transactions", "Agents", "Email", and "Help". An orange arrow points to the "Listings" menu item. Below the navigation bar, the main content area is titled "CBA Boise". It features three summary cards: "130 Listings" with buttons for "Manage Listings", "Export Listings", and "View Listing Traffic"; "199 Transactions" with a "Manage Transactions" button; and "31 Agents" with a "Manage Agents" button. A second orange arrow points to the "Manage Listings" button in the first card.



MANAGE LISTINGS

Navigating the Manage Listings page

The screenshot shows the 'Manage Listings' interface for 'CBA Boise'. At the top, there are filter dropdowns for 'Location', 'Type', 'Price/Size', and 'More', followed by a 'Keyword' search box and a 'Clear' button. Below this is the title 'Listings for CBA Boise' and a status filter bar with options: Active, Leased, Sold, Withdrawn, Expired, and Hold. To the right of the status bar are controls for 'Expand All', 'Filter by Agent', and 'Sorting by Modified Date'. The main content area displays 'No results!' with a subtext 'Try changing your filters to be more general'. Annotations with orange arrows point to various features: 'Add a new listing' points to the 'Add a Listing' button; 'Apply filters to search for specific listings' points to the filter dropdowns; 'Manage the listings of a specific agent' points to the 'Filter by Agent' button; 'Filter your office listings by status' points to the status filter bar; and 'Sort your listings by different criteria' points to the 'Sorting by Modified Date' dropdown.

Add a new listing

Apply filters to search for specific listings

Manage the listings of a specific agent

0 properties · 0 spaces

Listings for CBA Boise

Active Leased Sold Withdrawn Expired Hold

Expand All

No results!
Try changing your filters to be more general

Filter your office listings by status

Sort your listings by different criteria



MANAGE LISTINGS

Quick tips to help with managing your office listings

The screenshot shows a filter panel for the Manage Listings page. At the top, there are dropdown menus for 'Location', 'Type (2)', 'Price/Size', and 'More', along with a 'Keyword' search box and a 'Clear' button. Below this, a message states: 'You are searching for space in all types of buildings.' The filter panel is divided into three main sections: 'For Sale', 'Space Use', and 'Property/Building'. Under 'For Sale', there are checkboxes for 'Active' (checked), 'Sold', 'Withdrawn', 'Expired', and 'Hold'. Under 'For Lease', there are checkboxes for 'Active' (checked), 'Leased', 'Withdrawn', 'Expired', 'Hold', and 'Auction'. The 'Space Use' section includes checkboxes for 'Office', 'Retail', 'Industrial', 'Land', 'Flex/R&D', and 'Executive Suites/Coworking'. The 'Property/Building' section includes checkboxes for 'Retail', 'Office', 'Industrial', 'Life Science', 'Land', 'Farm/Ranch', 'Hospitality', 'Specialty', and 'Multi-Family'.

You can apply filters at the top of the Manage Listings page to make locating a specific listing easier than ever!

Note: Your Manage Listings page automatically shows your office's active listings. To switch from your active listings to your off-market listings, change the type from the available status types to the appropriate off-market status type.

The screenshot shows the 'Filter by Agent' search filter. It includes a title 'Filter by Agent' and a sub-header 'Only listings from the selected agents will appear on your list and on generated reports.' Below this is a 'Search by name' input field with the placeholder text 'e.g. John Smith...'. There are two checkboxes for agent selection: 'CBA Admin' and 'CBA Test Admin'. At the bottom right, there are buttons for 'Cancel', 'Clear All Selections', and 'Submit'. A status indicator shows '2 Agents' with 'Prev', '1', and 'Next' navigation buttons.

If you would like to view the listings of a specific agent, you can do so with the Filter by Agent search filter.

The screenshot shows the sorting options dropdown menu. The main header is 'Filter by Agent' and 'Sorting by Modified Date'. The dropdown menu is open, showing a list of sorting options: 'None', 'Total Available SF', 'Building Size', 'Land Size', 'Street Address', 'City', 'Center/Park Name', 'Property Type', and 'Modified Date'. The 'Modified Date' option is currently selected and highlighted in blue. There are also buttons for 'Cancel' and 'Apply'.

Use different methods to sort your office's listings to make the listing management process even easier for you!



MANAGE LISTINGS

Quick tip for adding a listing

As an admin user, you can input listings for agents while logged in to your own account. Once you get to the end of the listing input screen you will simply type in the primary listing agent's name. Once you find the appropriate agent after you have begun typing, click on their name and the system will add the broker as the listing agent and the listing will then appear in the broker's my listing page once you submit the listing!

If you need to add more than one agent, click "Add Secondary Agent" and repeat the process above as many times as you need to add all of the appropriate listing agents!

Listing Agents

Primary Agent: Company:

- CBA Admin
CBA Boise
- CBA Test Admin
CBA Boise

Listing Agents

Primary Agent: Company: CBA Boise



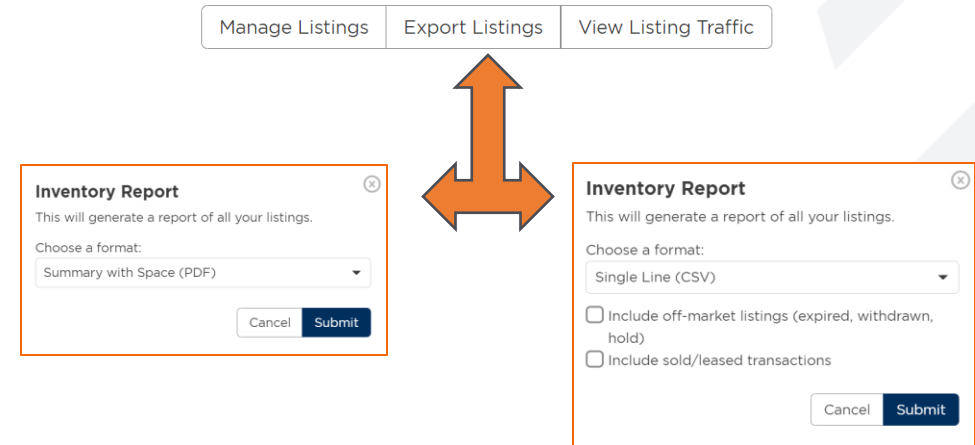
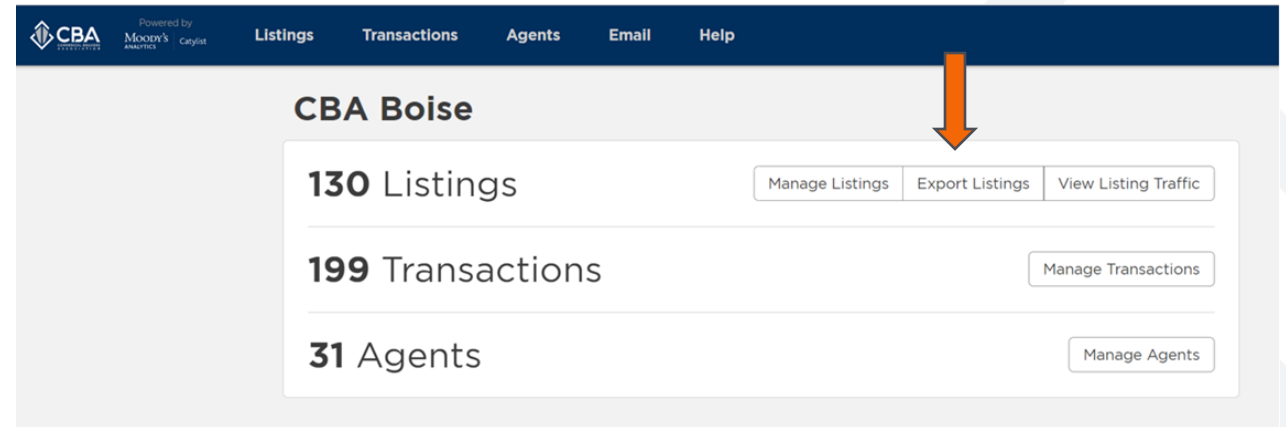
EXPORT LISTINGS

Pulling office inventory reports

You can pull an office inventory report by selecting **“Export Listings”** on your admin dashboard.

Once you have selected this a pop-up window will appear allowing you to select between a Summary with Space (PDF) inventory report or a Single Line (CSV) report.

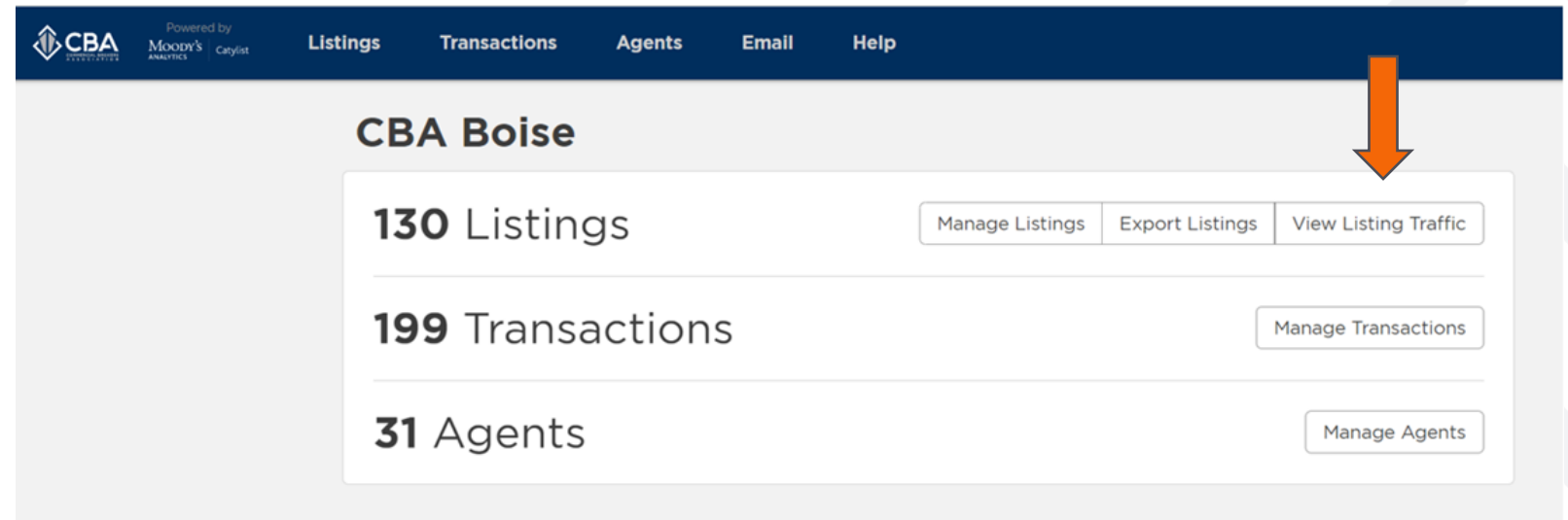
If you would like to include your off-market listings in your inventory report you will want to select the Single Line (CSV) report and select the off-market listing types you would like to include.



VIEW LISTING TRAFFIC

Accessing traffic count reports for your office listings

To review the traffic reports on your office listings you can select “View Listing Traffic” on the listing section of your dashboard.

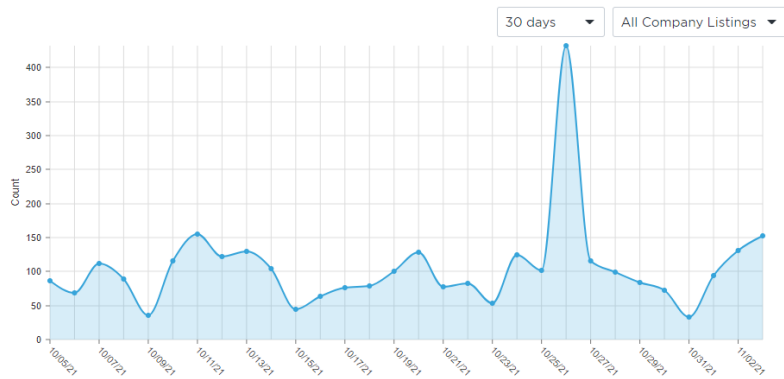


The screenshot shows the CBA Boise dashboard interface. At the top, there is a dark blue navigation bar with the CBA logo, the text "Powered by Moody's Analytics Citylist", and menu items for "Listings", "Transactions", "Agents", "Email", and "Help". Below the navigation bar, the main content area is titled "CBA Boise" and displays three summary cards: "130 Listings" with buttons for "Manage Listings", "Export Listings", and "View Listing Traffic"; "199 Transactions" with a "Manage Transactions" button; and "31 Agents" with a "Manage Agents" button. A large orange arrow points to the "View Listing Traffic" button.



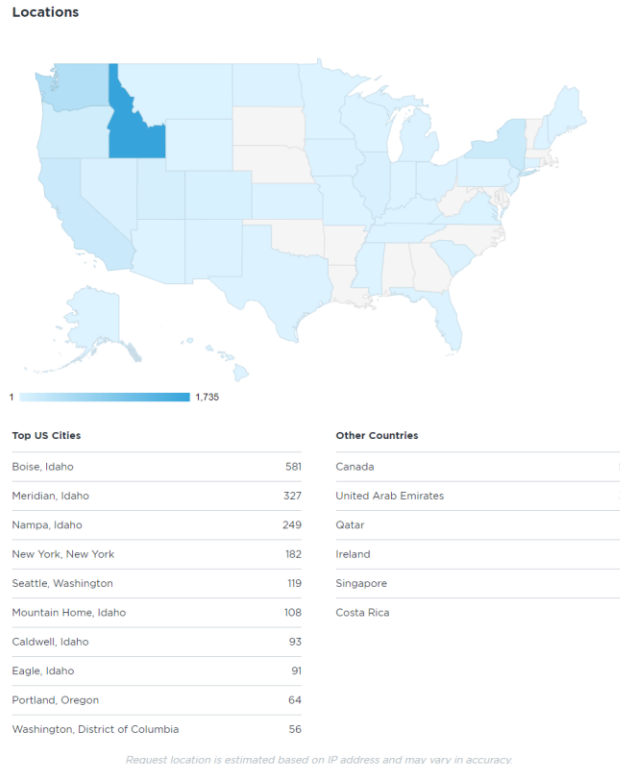
LISTING TRAFFIC

The different types of traffic reports



Views:

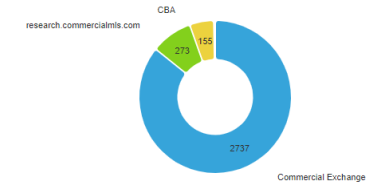
The views traffic report shows the total number of views on your listings.



Locations:

The locations traffic report shows the general location of those who have viewed your listings.

Sources



Commercial Exchange	2737
research.commercialmls.com	273
CBA	155
Catylist	1

Sources:

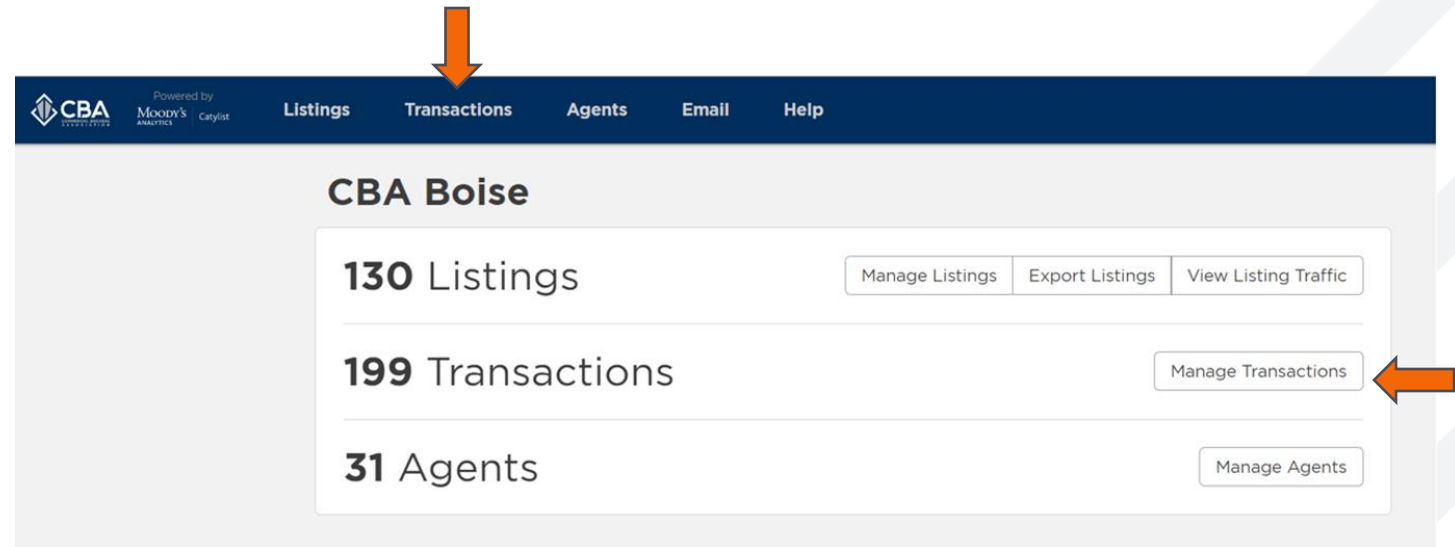
The sources traffic report shows which website your listings have been viewed on.



MANAGE TRANSACTIONS

Accessing your offices sold and leased listings

You can quickly access the listings in your office that have been sold or leased by selecting **“Transactions”** on the toolbar or **“Manage Transactions”** in the transactions section of your dashboard.



The screenshot shows a dashboard for 'CBA Boise'. At the top is a dark blue navigation bar with the CBA logo, 'Powered by Moody's Analytics Catalyst', and menu items: 'Listings', 'Transactions', 'Agents', 'Email', and 'Help'. An orange arrow points to the 'Transactions' menu item. Below the navigation bar, the dashboard content is titled 'CBA Boise' and contains three main sections: '130 Listings' with buttons for 'Manage Listings', 'Export Listings', and 'View Listing Traffic'; '199 Transactions' with a 'Manage Transactions' button (highlighted by an orange arrow); and '31 Agents' with a 'Manage Agents' button.



MANAGE TRANSACTIONS

Navigating the manage transactions page

Location ▾ | Type (2) ▾ | Price/Size ▾ | More ▾ | Keyword ← Apply filters to search for specific listings

Transactions for CBA Boise

Expand All

No results!
Try changing your filters to be more general

Add a leased or sold property that was not listed previously in CBA*.

Filter transactions by agent

Sort your office transactions

*A property can only be entered as a transaction if it was not originally listed in CBA and has already been sold or leased

**Any properties that you enter as a transaction are private and viewable to your office only



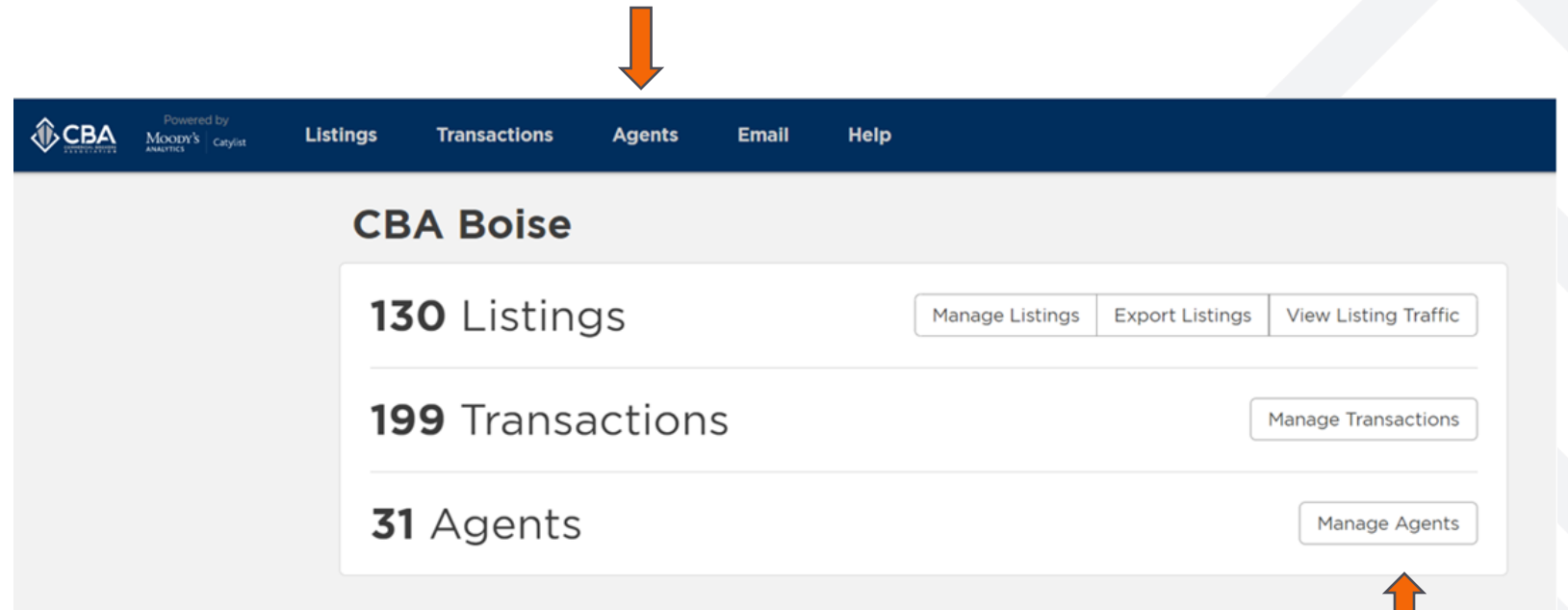
MANAGE AGENTS

Accessing your office roster

You can access your office roster via the “Agents” button on the toolbar or by selecting “Manage Agents” on the agents section of your dashboard.

You will do this to make changes to the agent’s public profile or log in as the agent and perform a search* for them.

*If you have a listing link from another company you need to open you will also want to login as an agent in order to view the listing.



The screenshot shows the CBA Boise dashboard interface. At the top, there is a dark blue navigation bar with the CBA logo and the text "Powered by MOODY'S ANALYTICS Caylist". The navigation bar contains several menu items: "Listings", "Transactions", "Agents", "Email", and "Help". An orange arrow points down to the "Agents" menu item. Below the navigation bar, the main content area is titled "CBA Boise". It features three summary cards: "130 Listings" with buttons for "Manage Listings", "Export Listings", and "View Listing Traffic"; "199 Transactions" with a "Manage Transactions" button; and "31 Agents" with a "Manage Agents" button. An orange arrow points up to the "Manage Agents" button.





MANAGE AGENTS

Accessing and managing agent profiles

Agent Name

2 Results Prev 1 Next

 CBA Admin	CBA Boise	Manage Listings	Edit Profile	Log In As
 CBA Test Admin	CBA Boise	Manage Listings	Edit Profile	Log In As

2 Results Prev 1 Next

Office Name

Manage the agent's listings


Log in as the agent to perform a search

Submit an official request to make a change to the agent's public profile information.

Edit Public Profile for CBA Admin

All change requests will be reviewed by research staff.

Profile Photo

 Upload

Full Name

CBA Admin

Email

cbaadmin@commercialmls.com

Mobile Phone

(555) 123-4567

Business Phone

(555) 123-4567

Company

CBA Boise

Company Role

Select a role...

Professional Overview / Biography

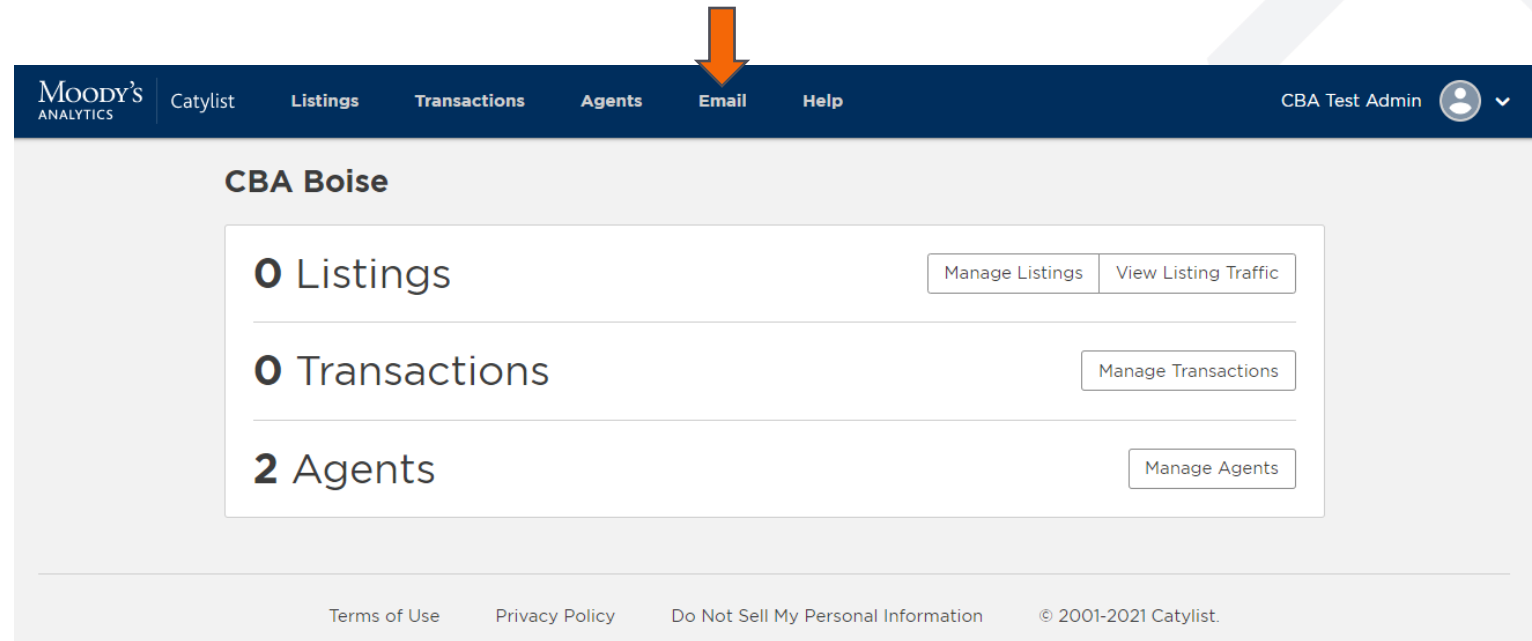
Cancel Request Changes



ADMIN E-MAIL

Accessing the e-mail dashboard

To set up your broadcast e-mail preferences or to send out broadcast e-mails for your office listings you will want to select “Email” on the toolbar.



The screenshot shows the Moody's Analytics CBA Boise dashboard. The top navigation bar is dark blue and contains the following items: 'MOODY'S ANALYTICS' logo, 'Catylist', 'Listings', 'Transactions', 'Agents', 'Email', and 'Help'. An orange arrow points to the 'Email' menu item. On the right side of the navigation bar, it says 'CBA Test Admin' with a user profile icon and a dropdown arrow. Below the navigation bar, the main content area is titled 'CBA Boise' and contains three sections: '0 Listings' with 'Manage Listings' and 'View Listing Traffic' buttons; '0 Transactions' with a 'Manage Transactions' button; and '2 Agents' with a 'Manage Agents' button. At the bottom of the page, there is a footer with links for 'Terms of Use', 'Privacy Policy', 'Do Not Sell My Personal Information', and a copyright notice '© 2001-2021 Catylist'.



ADMIN E-MAIL

Understanding the e-mail dashboard

Adjust your e-mail preferences

Send a want or need e-mail request out to the membership.

Send out a broadcast e-mail alert to the membership.

View the details on your sent broadcast e-mails

Preferences

New Need/Want

New Listing Broadcast

Sent History

Date	Status	Type	Subject	Recipients	Opens
You haven't sent any emails yet.					

The image shows a screenshot of an email dashboard interface. At the top, there are three main action buttons: 'Preferences' (with a gear icon), 'New Need/Want' (with a checkmark icon), and 'New Listing Broadcast' (with a checkmark icon). Below these buttons is a 'Sent History' section containing a table with columns for Date, Status, Type, Subject, Recipients, and Opens. The table is currently empty, displaying the message 'You haven't sent any emails yet.' Four orange arrows point from text annotations to specific parts of the dashboard: one points to the 'Preferences' button, one points to the 'New Need/Want' button, one points to the 'New Listing Broadcast' button, and one points to the 'Sent History' table area.

