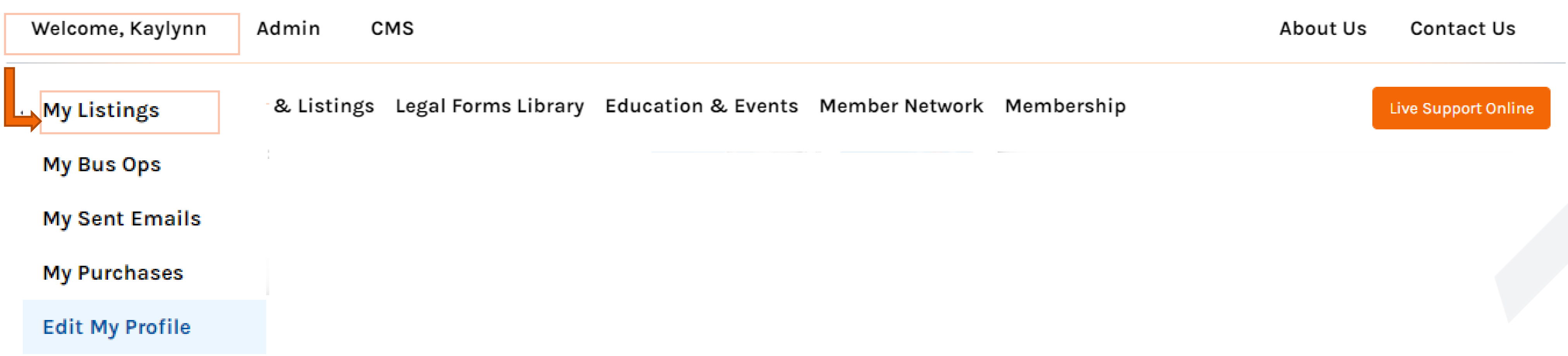
CBA
COMMERCIAL BROKERS ASSOCIATION

# 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!

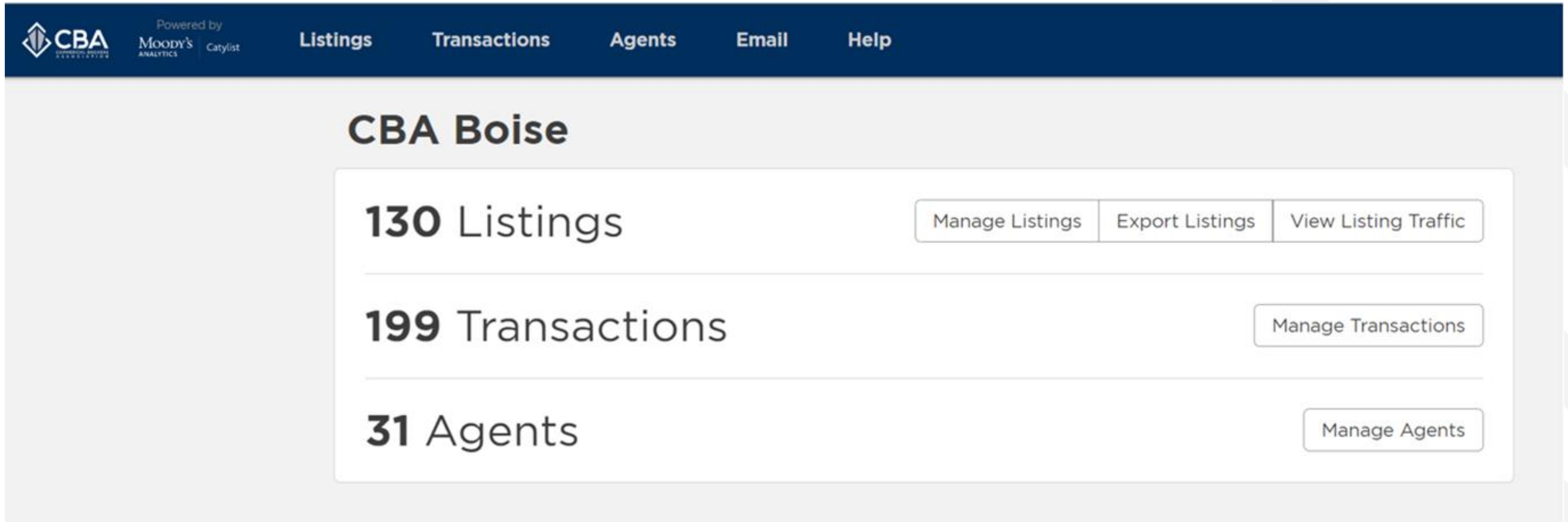
# THE ADMIN DASHBOARD
## Getting familiar with your dashboard

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.

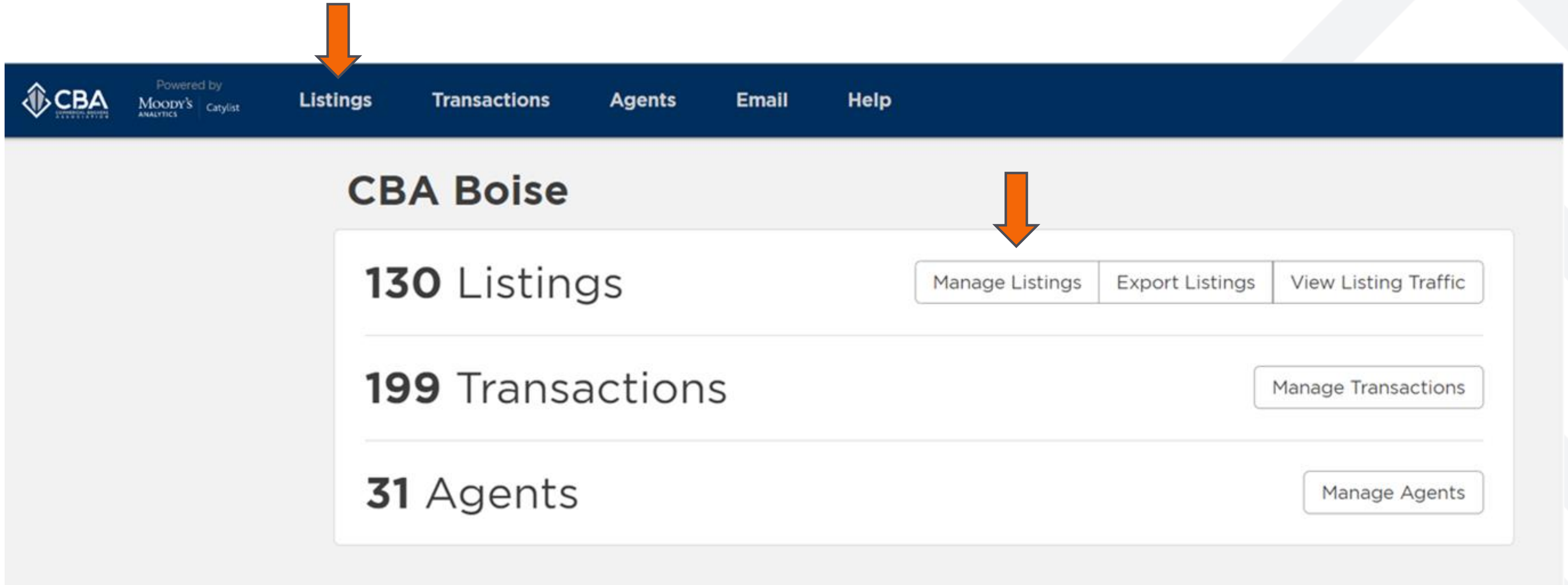
**Transactions** view and manage your office's sold or leased listings.

**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.



# MANAGE LISTINGS

## Accessing your office listings

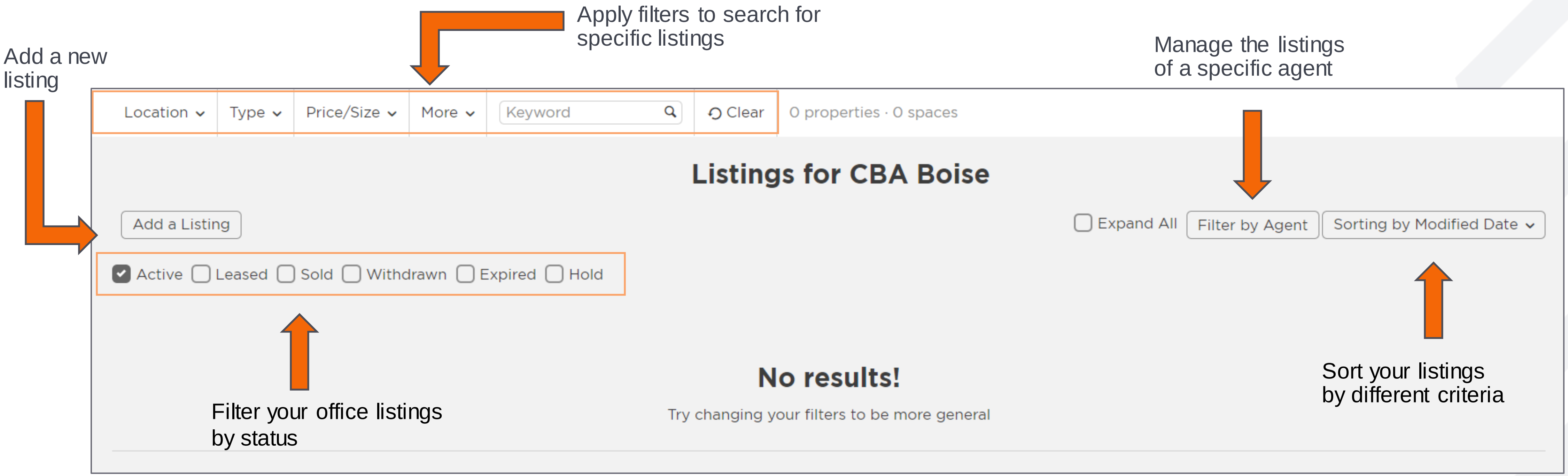



You can access your office's active and off-market listings by selecting "**Listings**" on the toolbar.

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

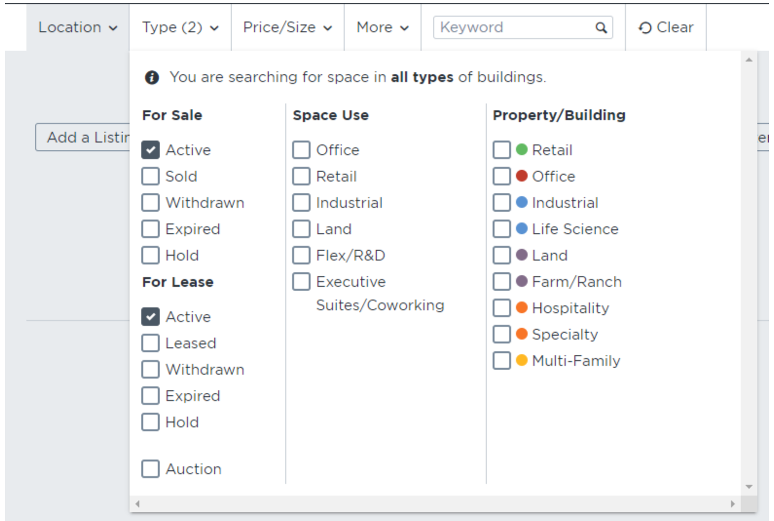
# MANAGE LISTINGS

## Navigating the Manage Listings page



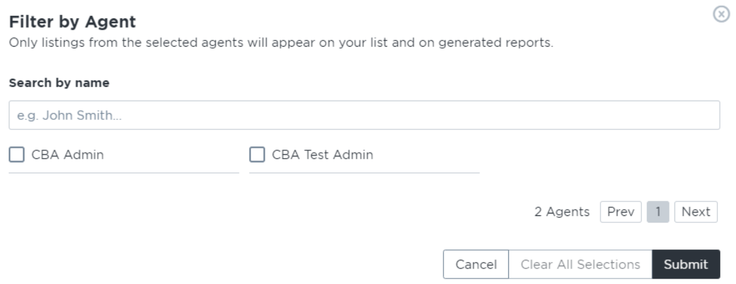
# MANAGE LISTINGS

## Quick tips to help with managing your office listings

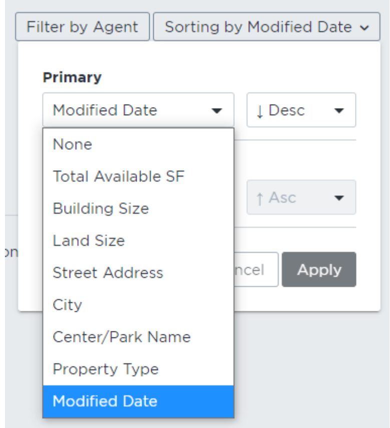



You can apply filters at the top of the Manage Listings page to make locating a specific listing easier than ever!

**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.




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

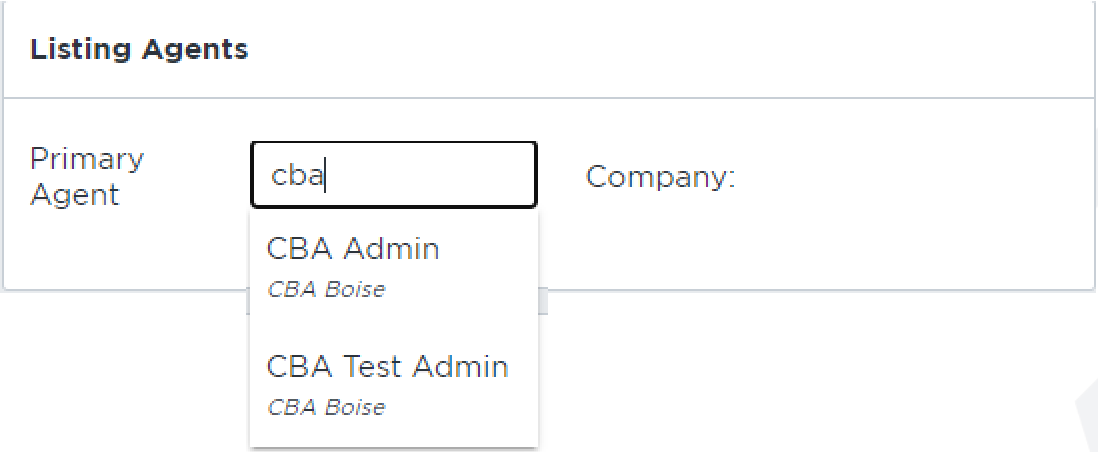



Use different methods to sort your office's listings to make the listing management process even easier for you!

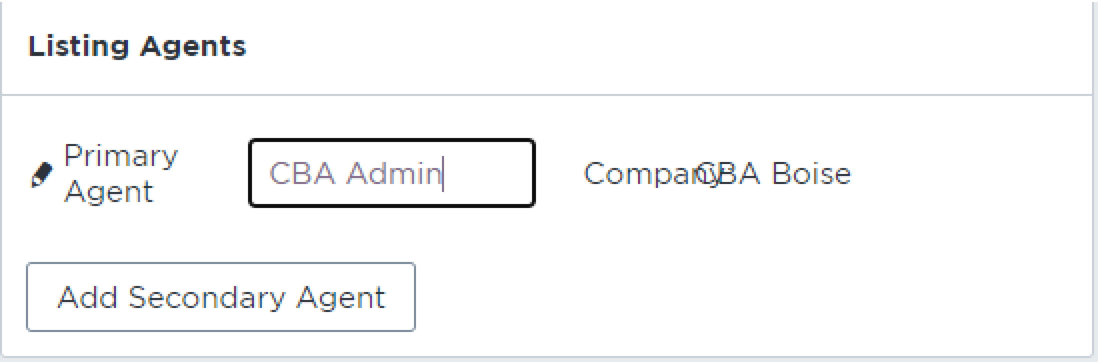
# MANAGE LISTINGS

## 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!



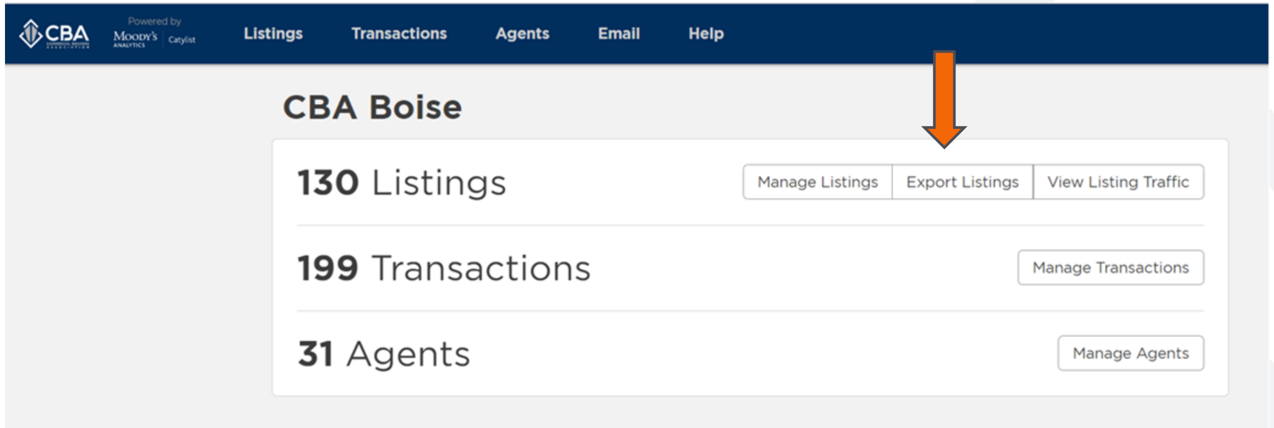

If you need to add more than one agent, click "Add Secondary Agent" and repeat the process above as many times as you need to add all of the appropriate listing agents!




For more information view the Listing Management how-to-guide

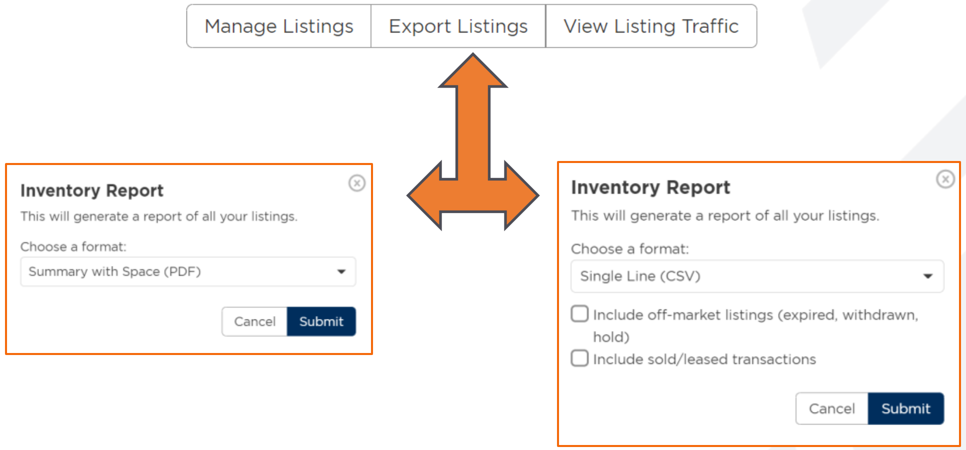
# EXPORT LISTINGS

## 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.

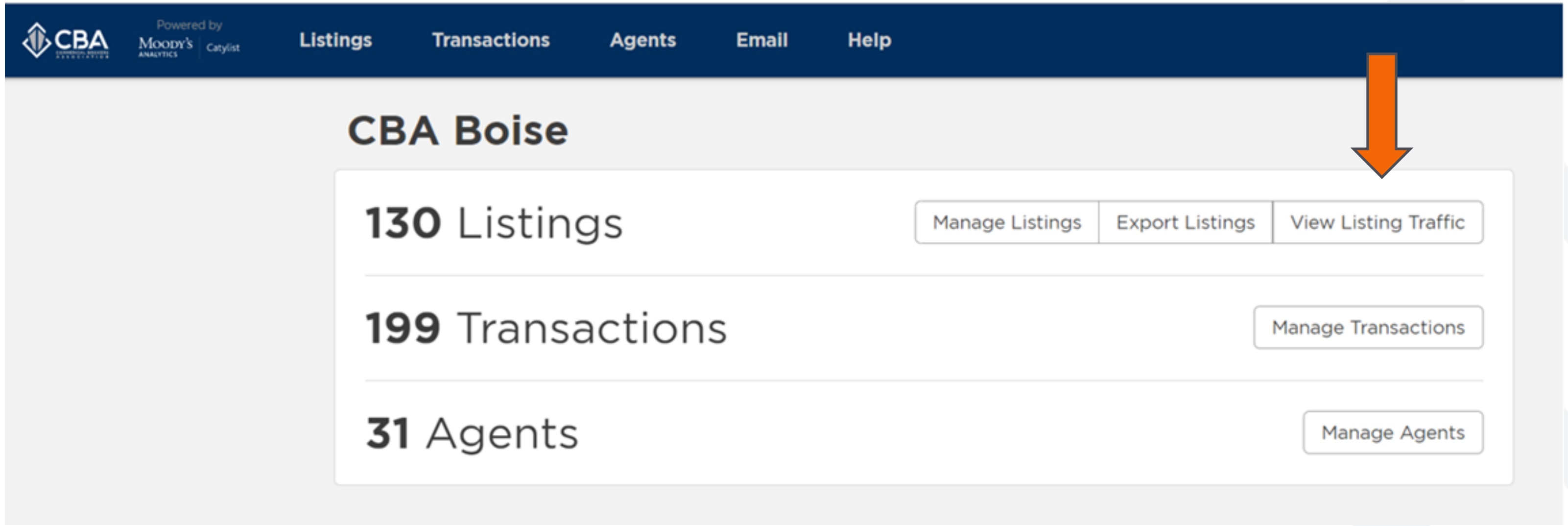



If you would like to include your off-market listings in your inventory report you will want to select the Single Line (CSV) report and select the off-market listing types you would like to include.

# VIEW LISTING TRAFFIC

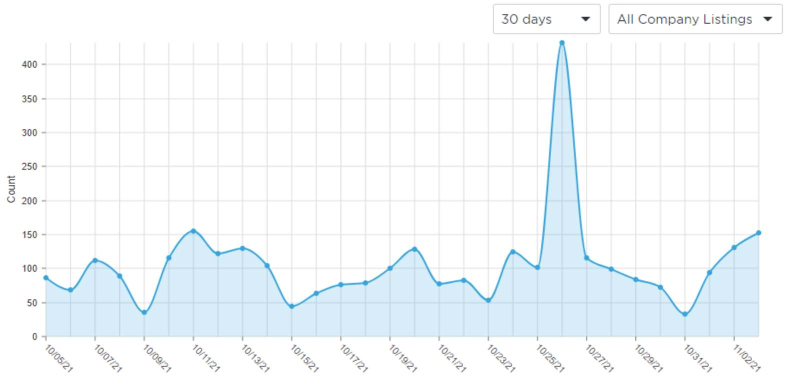
## Accessing traffic count reports for your office listings

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



# LISTING TRAFFIC

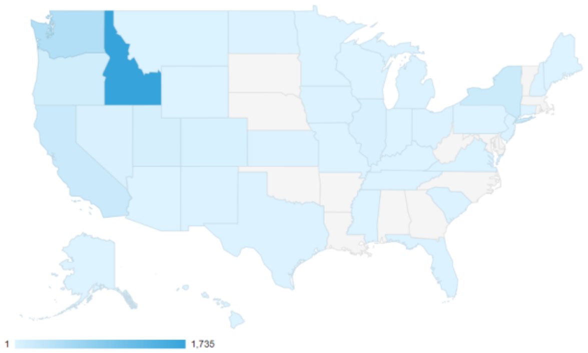
## The different types of traffic reports




Views:

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

**Locations**




| Top US Cities | |
|---|---|
| Boise, Idaho | 581 |
| Meridian, Idaho | 327 |
| Nampa, Idaho | 249 |
| New York, New York | 182 |
| Seattle, Washington | 119 |
| Mountain Home, Idaho | 108 |
| Caldwell, Idaho | 93 |
| Eagle, Idaho | 91 |
| Portland, Oregon | 64 |
| Washington, District of Columbia | 56 |

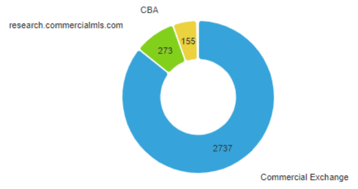
| Other Countries | |
|---|---|
| Canada | 5 |
| United Arab Emirates | 3 |
| Qatar | 1 |
| Ireland | 1 |
| Singapore | 1 |
| Costa Rica | 1 |

*Request location is estimated based on IP address and may vary in accuracy.*

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 |

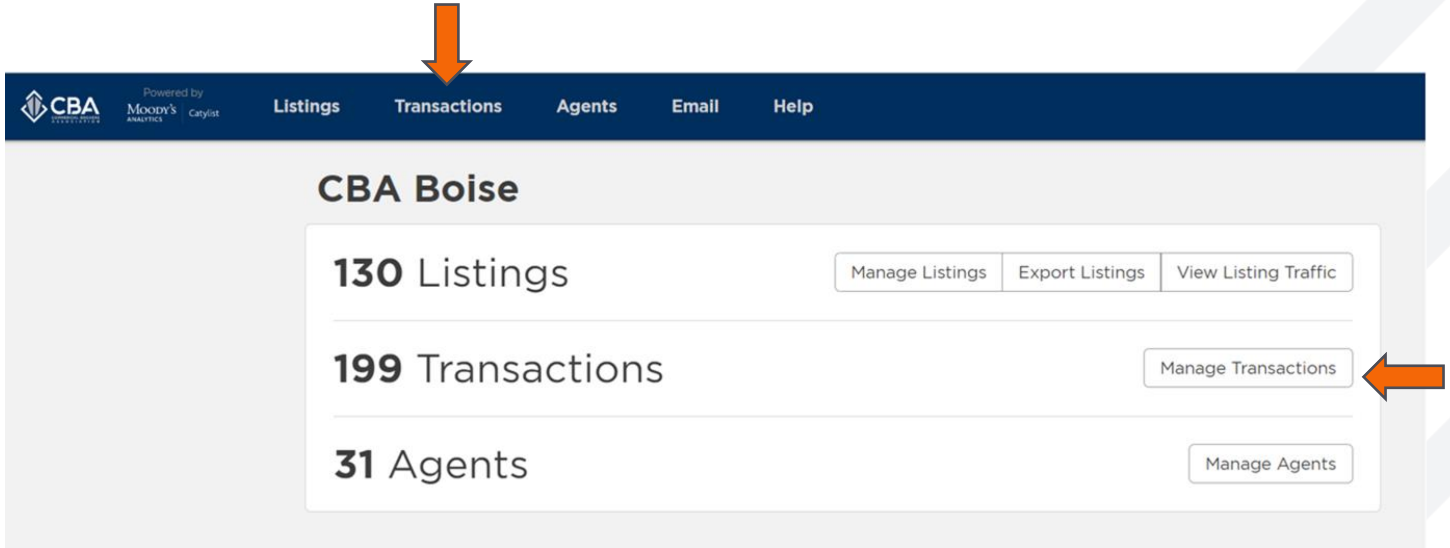
Sources:

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

# MANAGE TRANSACTIONS

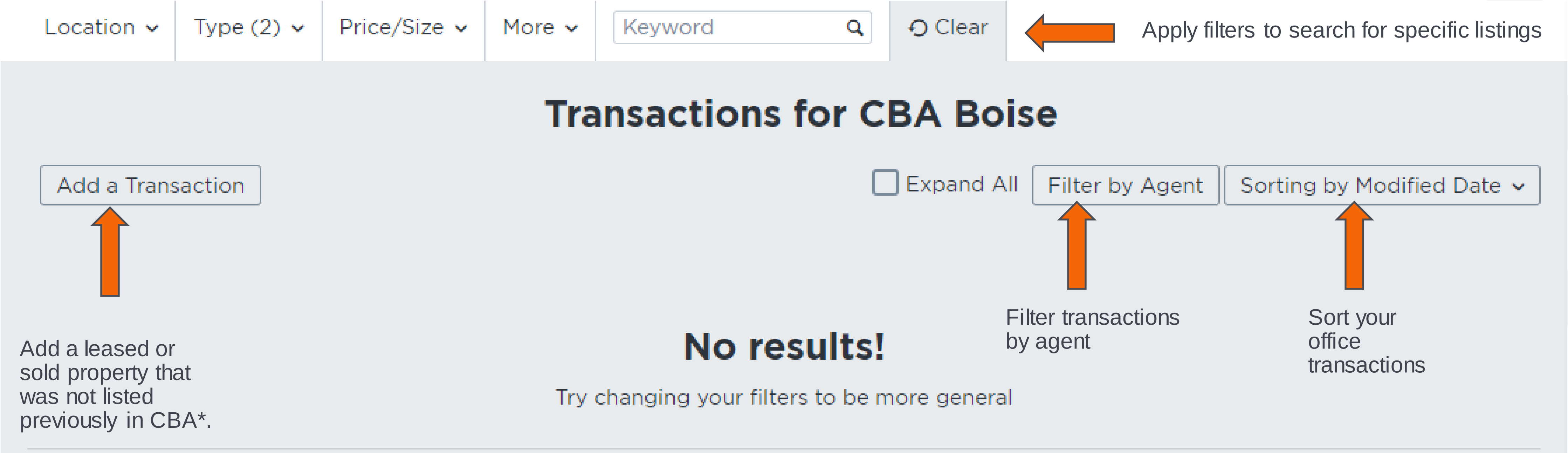
## Accessing your offices sold and leased listings

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.



# MANAGE TRANSACTIONS

## Navigating the manage transactions page



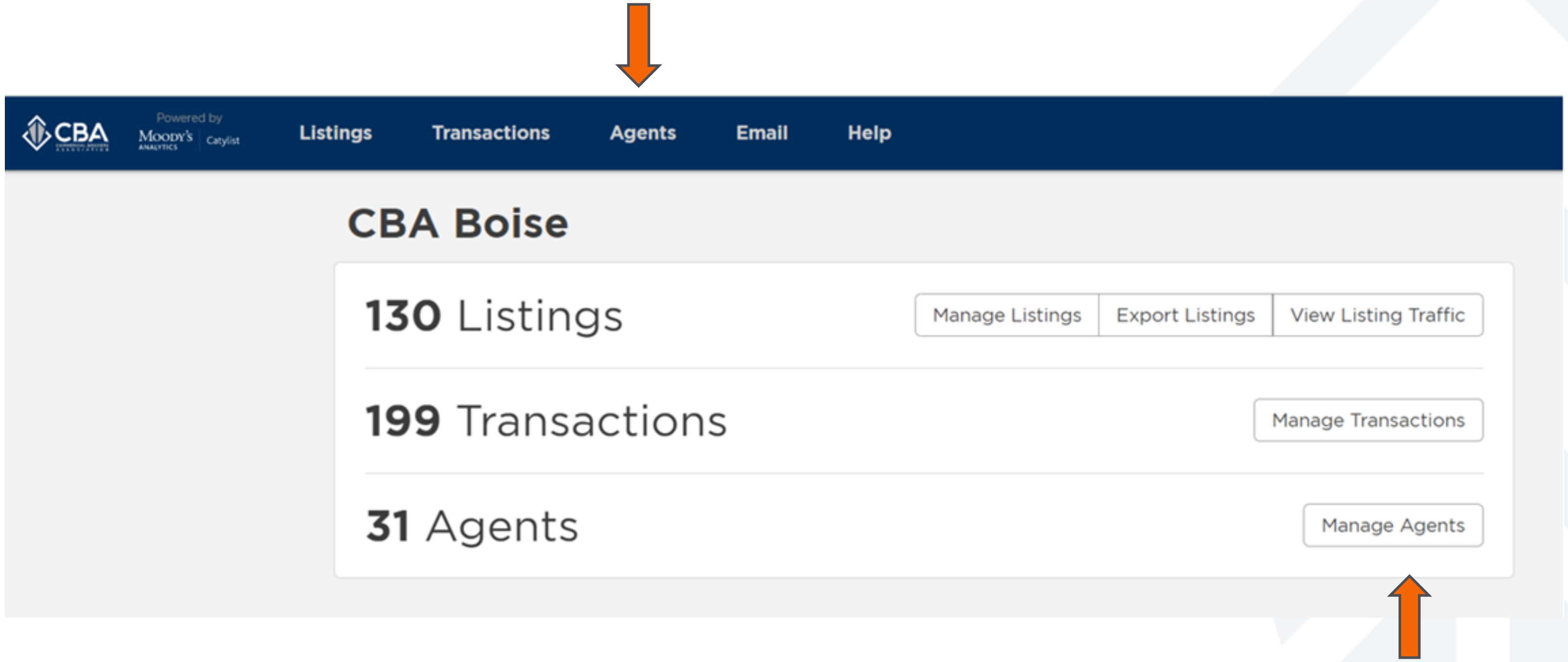

*A property can only be entered as a transaction if it was not originally listed in CBA and has already been sold or leased

**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.

# MANAGE AGENTS

## Accessing and managing agent profiles

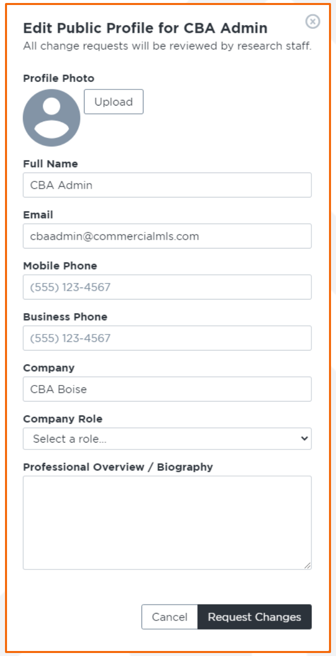
Agent Name

Manage the agent’s listings

Log in as the agent to perform a search


Office Name

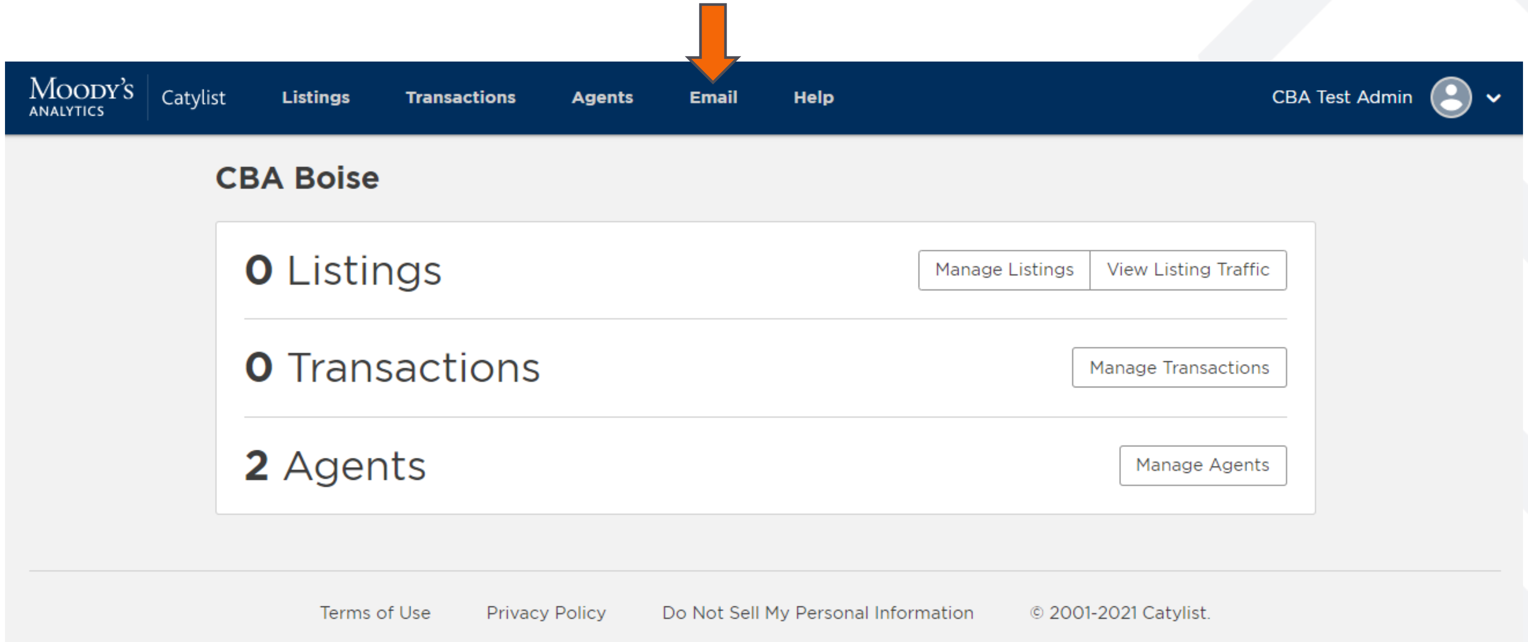
Submit an official request to make a change to the agent’s public profile information.



# 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.



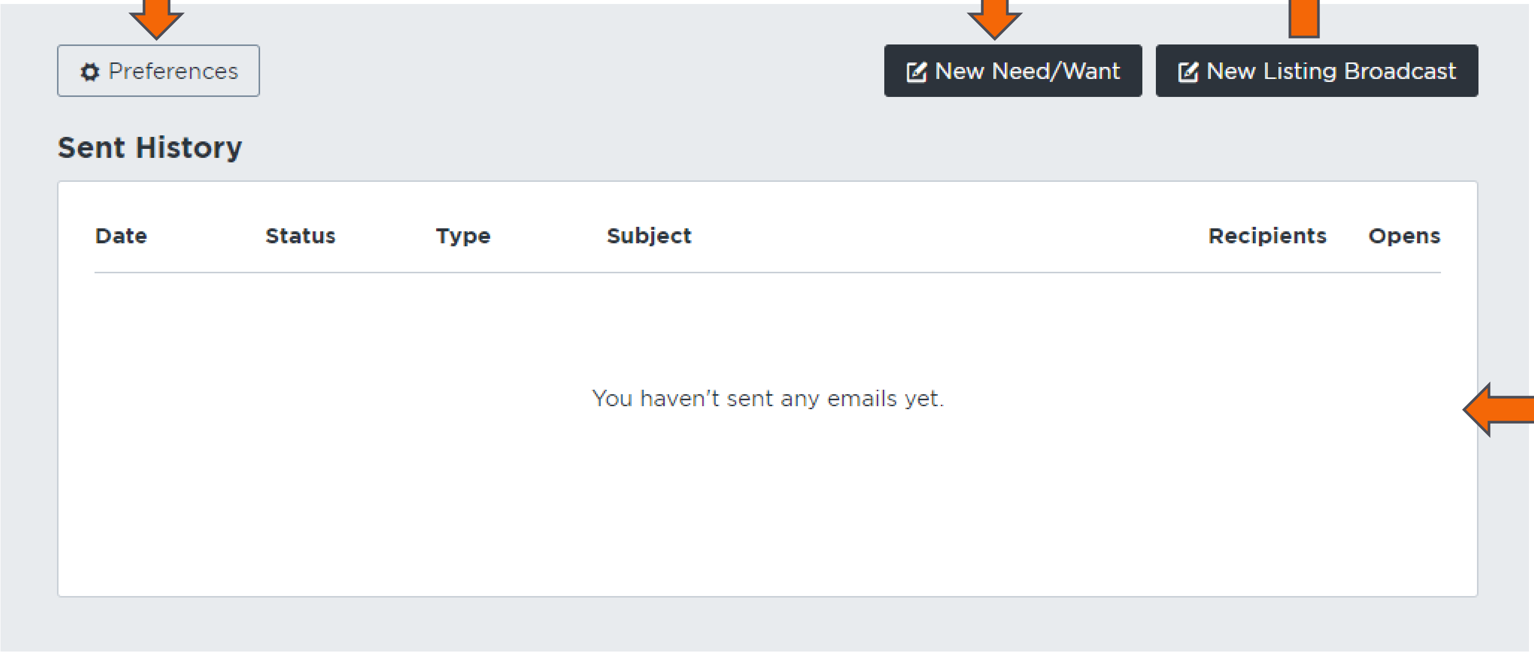
# ADMIN E-MAIL

## 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

For more information, please view the Email Marketing Tools how-to-guide.