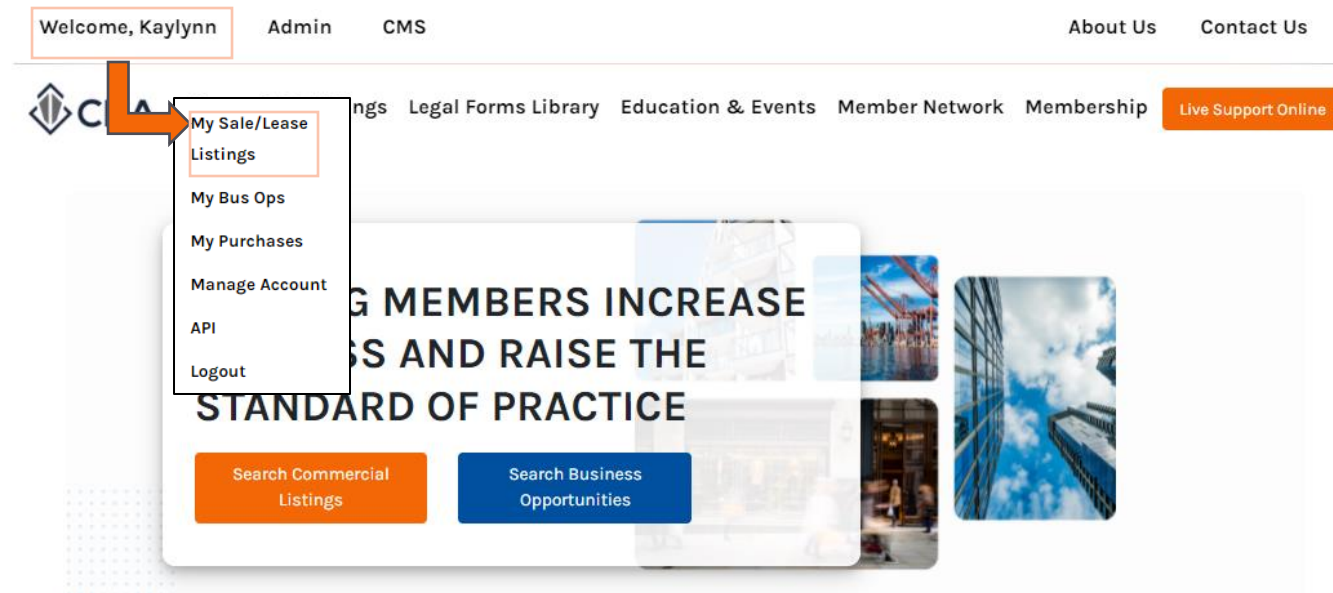# MANAGING EXISTING LISTINGS AND PROPERTY RECORDS

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

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 your listings

Verify your listings are accurate

See who has viewed your listings

Add a listing

Download your inventory report

View the traffic for all of your listings

| Location ⌄ | Type ⌄ | Price/Size ⌄ | More ⌄ | Keyword 🔍 | ↻ Clear | 2 properties · 2 spaces |

Listings for CBA Instructor

+Add a Listing | ℹ Verify Listings | Export Listings | View Leads | View Traffic

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

Filter your listings by status

☑ Active ☐ Leased ☐ Sold ☐ Withdrawn ☐ Expired ☐ Hold

☐ Expand All | Sorting by Modified Date ⌄

Touchstone Kirkland Building
12131 113th Ave NE, Kirkland, WA

● Office
General
Existing Bldg status

8,487 SF Total Available
133,004 SF Building
3.44 Acres Land

Hide 1 Space ⌃

Industrial For Lease
CBA Instructor

Negotiable

Private 🔒

Edit | View | Promote | See Traffic

See Traffic

Listing management tools

Bulk Edit | Manage Flyers

Add Space

Property Record your listing is attached to

110th Avenue NE Land
110th Avenue Northeast, Kirkland, WA

● Retail
Existing Bldg status
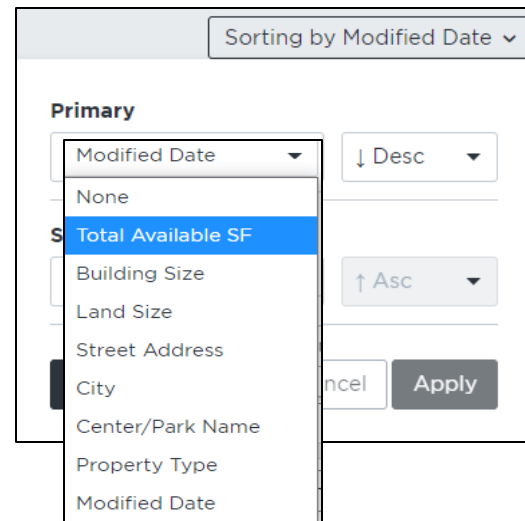
0 SF Total Available
1 SF Building
0.28 Acres Land

Show 1 Space ⌄

Expand the listings for a specific property

2 Results | Prev | 1 | Next

TIPS & TRICKS – SORT AND FILTER THROUGH YOUR LISTINGS

Apply search filters using the top white navigation bar to quickly locate a specific 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.

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.

ACCESS YOUR OFF-MARKET LISTINGS

The My Listings page is defaulted to show you your active listing inventory. To view your off-market listings, you will want to change your status filters.

You will begin by unchecking "Active" and then select sold/leased, withdrawn, expired, or hold.

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 X Space(s)**.
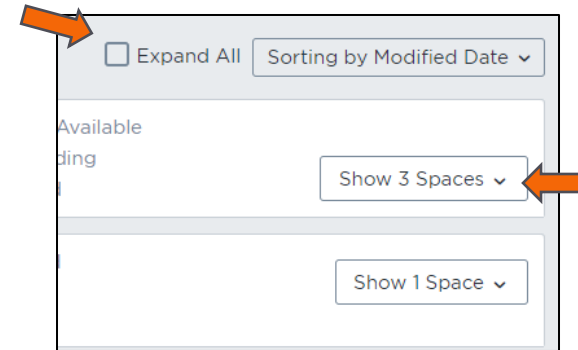
After you've expanded the property view to include your listings, you will have access to the following listing management tools:

Edit takes you into the update for listing screen

View shows your public listing link

Promote allows you to generate a listing report 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.
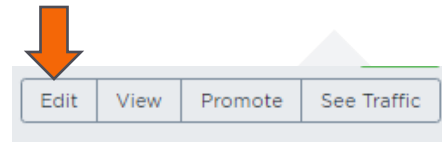
MANAGE YOUR LISTINGS
Edit your listings

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

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

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.

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

View details regarding the status of your listing

Verify your listing

If you would like to copy the current listing information into a new listing, simply 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 an 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.
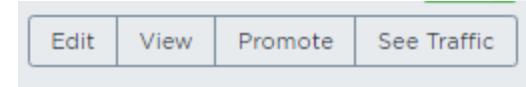
LISTING MANAGEMENT
Promote your listing

The promote button has two features available for your listing:

Request a broadcast e-mail for your listing
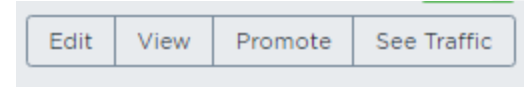
Generate a listing report to share.

For more information on broadcast e-mails, please view our Marketing Tools how-to-guide

LISTING MANAGEMENT
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 ▾

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
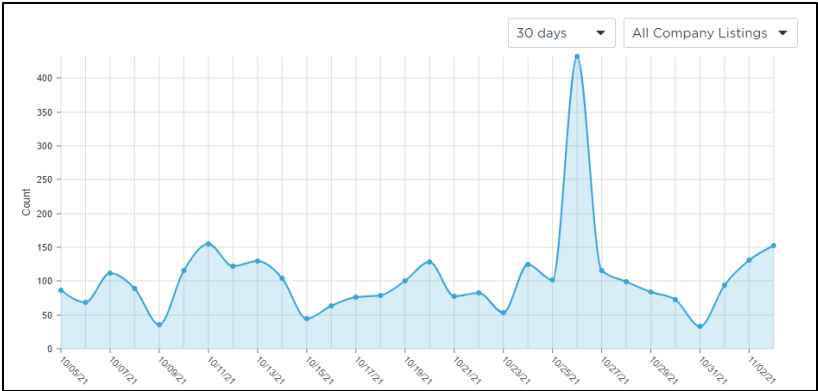
Views:

The total number of views on your listings
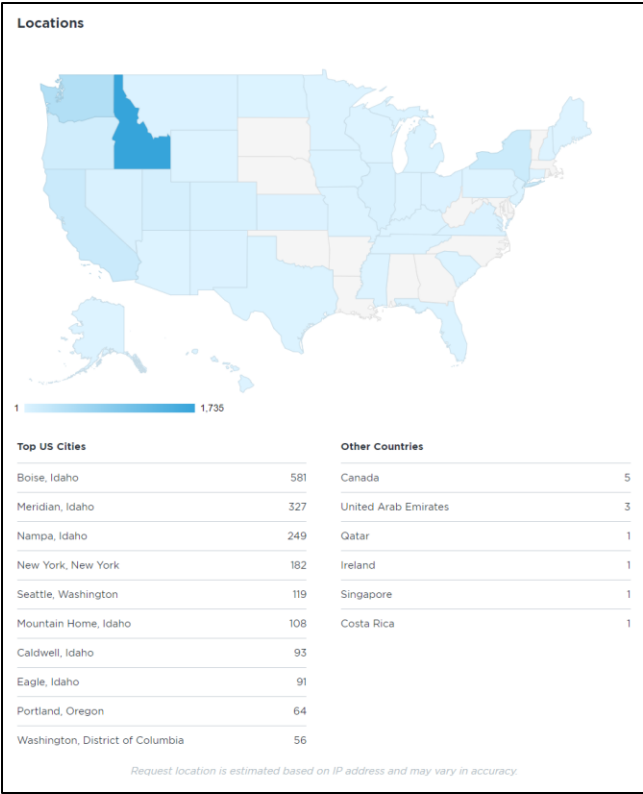
Locations:

Where your listings are being viewed.
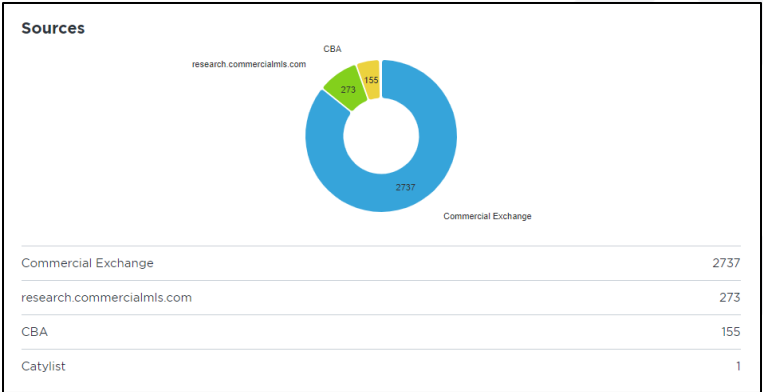
Sources:

The website your listing is being view from.

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LISTING MANAGEMENT
See Traffic - View Leads

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
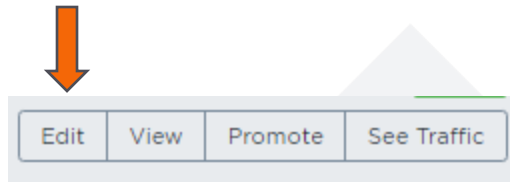
You may find that the information within the property record that is attached to your listing or the listing you're creating is incorrect. To make changes, click "Edit" on your listing and then click on Property/Building tab in the left corner to access the property details.

PROPERTY 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.

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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.

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