



DASHBOARD AND PROFILE BENEFIT OVERVIEW

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

ACCESSING YOUR LISTINGS AND PERFORMING SEARCHES

Once you have logged into the CBA main page, you can access your searching and listing management tools via two 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.

The screenshot displays the CBA website's user interface. At the top left, a user is logged in as 'Welcome, Kaylynn'. A dropdown menu is open under this name, with 'My Sale/Lease Listings' highlighted in blue and an orange arrow pointing to it. Other menu items include 'My Bus Ops', 'My Purchases', 'Manage Account', 'API', and 'Logout'. To the right of the user name are links for 'Admin' and 'CMS'. Further right are 'About Us' and 'Contact Us'. A prominent orange button labeled 'Live Support Online' is located on the right side. Below the navigation, a horizontal menu contains 'Search & Listings', 'Legal Forms Library', 'Education & Events', 'Member Network', and 'Membership'. The main content area features a large banner with the text 'PING MEMBERS INCREASE SUCCESS AND RAISE THE STANDARD OF PRACTICE'. Below this banner are two buttons: an orange 'Search Commercial Listings' button and a blue 'Search Business Opportunities' button. An orange arrow points upwards to the 'Search Commercial Listings' button.



NAVIGATING THE TOOLBAR

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

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.




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

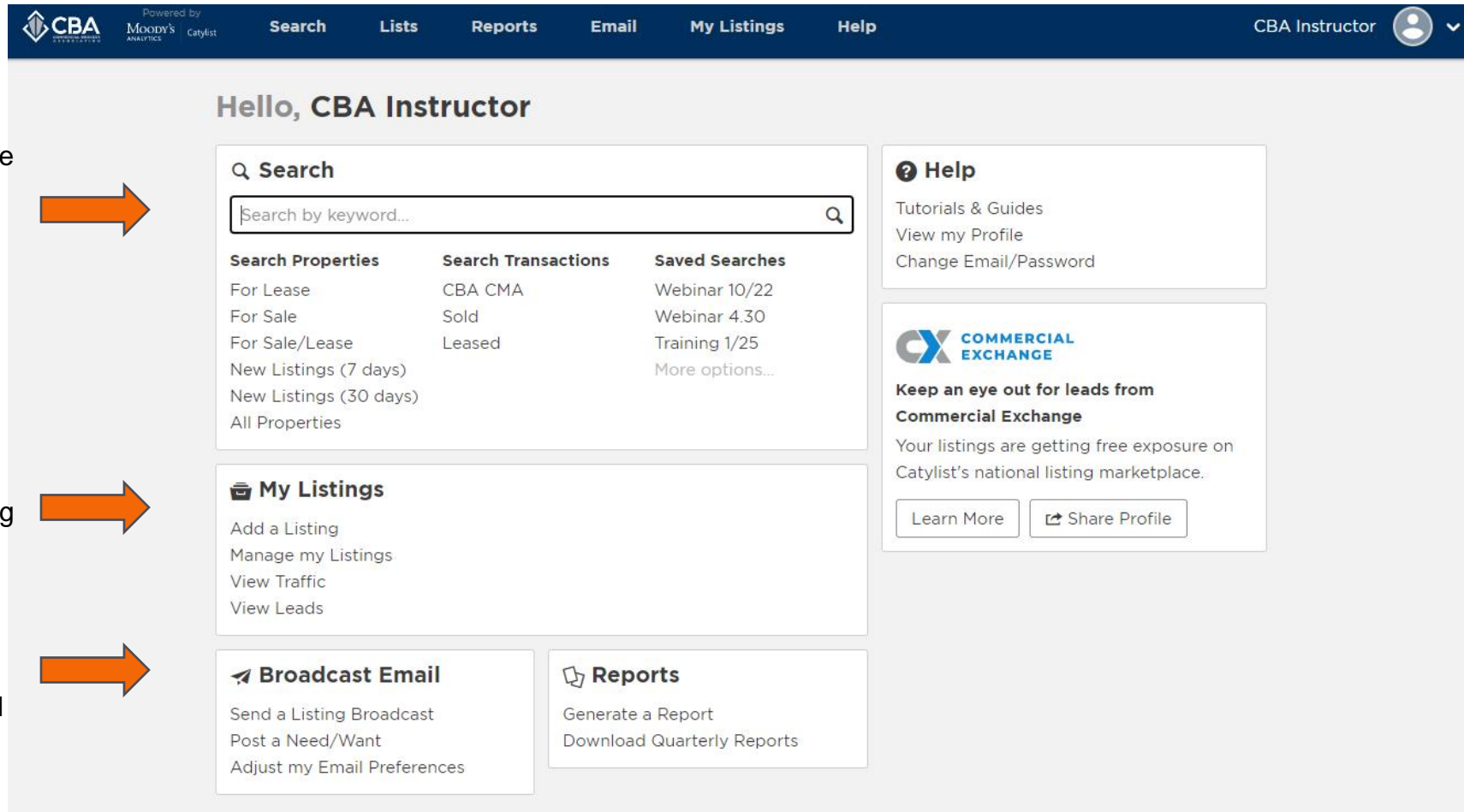
How to use your dashboard

If you selected  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 CBA Instructor dashboard interface. At the top is a dark blue navigation bar with the CBA logo, 'Powered by Moody's Analytics Catylist', and menu items: Search, Lists, Reports, Email, My Listings, and Help. On the right of the bar, it says 'CBA Instructor' next to a user profile icon and a dropdown arrow. An orange arrow points to this profile icon. Below the navigation bar, the main content area is titled 'Hello, CBA Instructor'. It features several sections: a 'Search' section with a search bar and three columns of links (Search Properties, Search Transactions, Saved Searches); a 'My Listings' section with links to Add a Listing, Manage my Listings, View Traffic, and View Leads; a 'Broadcast Email' section with links to Send a Listing Broadcast, Post a Need/Want, and Adjust my Email Preferences; and a 'Reports' section with links to Generate a Report and Download Quarterly Reports. To the right of the main content, there is a 'Help' section with links to Tutorials & Guides, View my Profile, and Change Email/Password. Below that is a 'COMMERCIAL EXCHANGE' section with a message about leads and two buttons: 'Learn More' and 'Share Profile'. An orange arrow points from the left text to the Search section. Another orange arrow points from the right text to the profile icon in the navigation bar.

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.

The screenshot shows the top navigation bar of the CBA website. On the left, there are logos for CBA (Commission of Business Appraisers), Moody's Analytics, and Catylist. The navigation menu includes links for Search, Lists, Reports, Email, My Listings, and Help. On the far right, there is a user profile icon with a dropdown arrow. Below the navigation bar, a grey banner displays "Hello, CBA Instructor". A dropdown menu is open, showing three options: "My Listings", "My Profile", and "My Company". Three orange arrows point to these options with descriptive text: "Access your listings" points to "My Listings", "View and share your public profile" points to "My Profile", and "View your company profile to view your office's contact information and company roster" points to "My Company". A fourth orange arrow points from the profile icon in the navigation bar to the top of the dropdown menu.

Powered by
MOODY'S ANALYTICS
Catylist

Search Lists Reports Email My Listings Help

Hello, CBA Instructor

CBA Instructor

Access your listings → My Listings

View and share your public profile ← My Profile

View your company profile to view your office's contact information and company roster → My Company

