

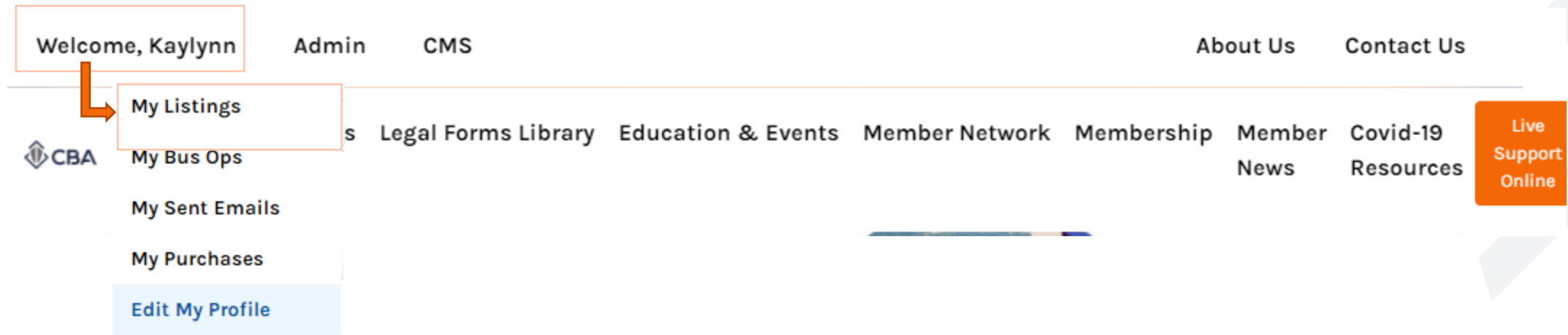


# ADMIN DASHBOARD

In this guide we will be reviewing what phase two looks like for our users with an admin account type

# HOW TO ACCESS YOUR CATYLIST DASHBOARD

## Logging into Catylist



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

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



# THE ADMIN DASHBOARD

**Listings** view your office listings

**Transactions** view your office listings that have been leased or sold

**Agents** the list of agents in your office

**Email** access and send out e-mails from your account

The screenshot displays the admin dashboard for CBA Boise, powered by Catylist. The dashboard features a dark navigation bar with the CBA Commercial Brokers Association logo, the Catylist logo, and menu items for Listings, Transactions, Agents, Email, and Help. A user profile icon is visible in the top right corner. The main content area is titled 'CBA Boise' and contains three summary cards: '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. The footer includes links for Terms of Use, Privacy Policy, Do Not Sell My Personal Information, and a copyright notice for 2001-2021 Catylist.

Category	Count	Management Action
Listings	0	Manage Listings, View Listing Traffic
Transactions	0	Manage Transactions
Agents	2	Manage Agents



# MANAGE LISTINGS

Access office listings

**0** Listings

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**0** Transactions

---

**2** Agents



Manage Listings

View Listing Traffic

Manage Transactions

Manage Agents



# MANAGE LISTINGS

## Access office listings

Location ▾ | Type (2) ▾ | Price/Size ▾ | More ▾ | Keyword  🔍 |

← Apply filters to search for specific listings

### Listings for CBA Boise

Expand All

**No results!**  
Try changing your filters to be more general

↑ Add a new listing

↑ Filter listings by agent

↑ Chose how you'd like to sort your office listings



# MANAGE LISTINGS

## Access office listings – Quick Tips

Location ▾ Type (2) ▾ Price/Size ▾ More ▾ Keyword 🔍 Clear

**📘** You are searching for space in **all types** of buildings.

**For Sale**

- Active
- Sold
- Withdrawn
- Expired
- Hold

**For Lease**

- Active
- Leased
- Withdrawn
- Expired
- Hold
- Auction

**Space Use**

- Office
- Retail
- Industrial
- Land
- Flex/R&D
- Executive Suites/Coworking

**Property/Building**

- Retail
- Office
- Industrial
- Life Science
- Land
- Farm/Ranch
- Hospitality
- Specialty
- Multi-Family

Your my listings page automatically takes you to view your active listings. To switch from your active listings to your off-market listings, change the type from Active to the appropriate off-market status.

### Filter by Agent

Only listings from the selected agents will appear on your list and on generated reports.

#### Search by name

e.g. John Smith...

CBA Admin  CBA Test Admin

2 Agents Prev 1 Next

Cancel Clear All Selections Submit

You no longer have to login as a specific agent to view their listings, you can instead filter through your office listings on your own account!

Filter by Agent | Sorting by Modified Date ▾

**Primary**

Modified Date ▾ | ↓ Desc ▾

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

Cancel Apply

You choose the way in which the listings on your manage listing page are sorted.



# MANAGE LISTINGS

## Add a new office listing

When you go to input a new listing, you no longer have to login as the user, you can now simply type in the name of the appropriate agent in the box.

The system will search for the agent in your roster along with the company. Once you find the appropriate agents, click on their name and it will add them as the agent

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 the listing agents you need.

The image shows two screenshots of a web form titled "Listing Agents".

The top screenshot shows the "Primary Agent" field with the text "cba" entered. A dropdown menu is open, displaying two search results: "CBA Admin" (with "CBA Boise" below it) and "CBA Test Admin" (with "CBA Boise" below it). The "Company:" field is empty.

The bottom screenshot shows the "Primary Agent" field with "CBA Admin" selected. The "Company:" field now contains "CBA Boise". Below the form is a button labeled "Add Secondary Agent".



# MANAGE TRANSACTIONS

Access your offices sold or leased listings

0 Listings

Manage Listings

View Listing Traffic

0 Transactions

Manage Transactions

2 Agents

Manage Agents





# MANAGE TRANSACTIONS

Access your offices closed listings

Location ▾ | Type (2) ▾ | Price/Size ▾ | More ▾ | Keyword  🔍 |

← Apply filters to search for specific listings

## Transactions for CBA Boise

Expand All

↑ Add a new closed listing

**No results!**  
Try changing your filters to be more general

↑ Filter transactions by agent

↑ Sort your office transactions



# VIEW LISTING TRAFFIC

View the traffic counts for all your office or individual listings

**0** Listings

Manage Listings

View Listing Traffic

**0** Transactions

Manage Transactions

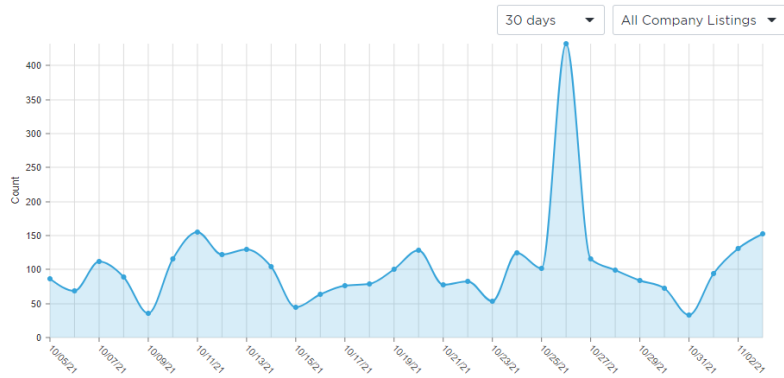
**2** Agents

Manage Agents



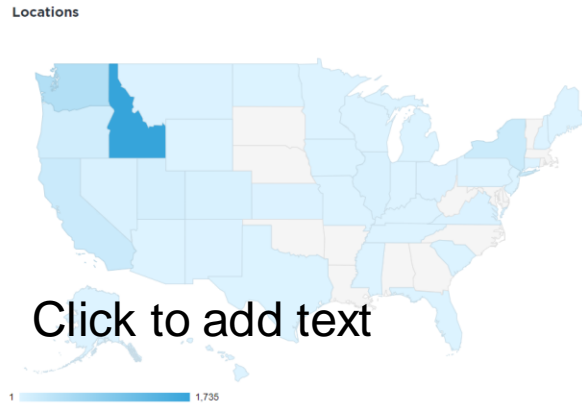
# LISTING TRAFFIC

## The different listing traffic reports



Views:

The total number of views on your listings



Click to add text

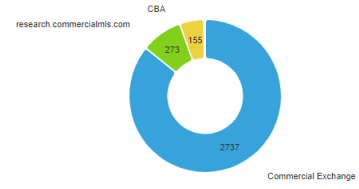
Top US Cities		Other Countries	
Boise, Idaho	581	Canada	5
Meridian, Idaho	327	United Arab Emirates	3
Nampa, Idaho	249	Qatar	1
New York, New York	182	Ireland	1
Seattle, Washington	119	Singapore	1
Mountain Home, Idaho	108	Costa Rica	1
Caldwell, Idaho	93		
Eagle, Idaho	91		
Portland, Oregon	64		
Washington, District of Columbia	56		

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

Locations:

Where your listings are being viewed.

Sources



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

Sources:

The website your listing is being view from.



# MANAGE AGENTS

Access the agents in your office

0 Listings

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Manage Listings

View Listing Traffic

0 Transactions

---

Manage Transactions

2 Agents

Manage Agents



Make changes to your specific agent's listings, edit their profile or login as them.



# MANAGE AGENTS

Access your agent's specific information

Agent Name

Manage an agents listings

Log in as an agent

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

Submit a request to make a change to an 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**

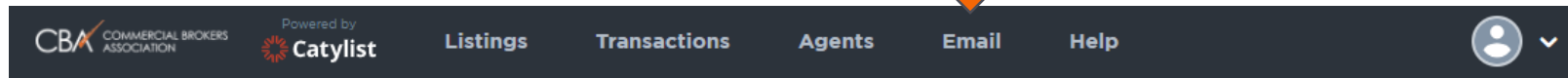
Cancel Request Changes



# ADMIN E-MAIL

Access the your Catylist-powered e-mail

Access your Catylist-powered e-mail



# ADMIN E-MAIL

## The E-mail Dashboard

Adjust your e-mail preferences

Send a want or need request out to the membership.

Send out a broadcast e-mail to the membership for your office listings.

View the details on your sent broadcast e-mails and view e-mail notifications sent to you from the system.

Preferences

New Need/Want

New Listing Broadcast

### Sent History

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

The screenshot shows the Admin E-mail 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.' Annotations with orange arrows point to each of these elements, providing instructions on their functions.

