



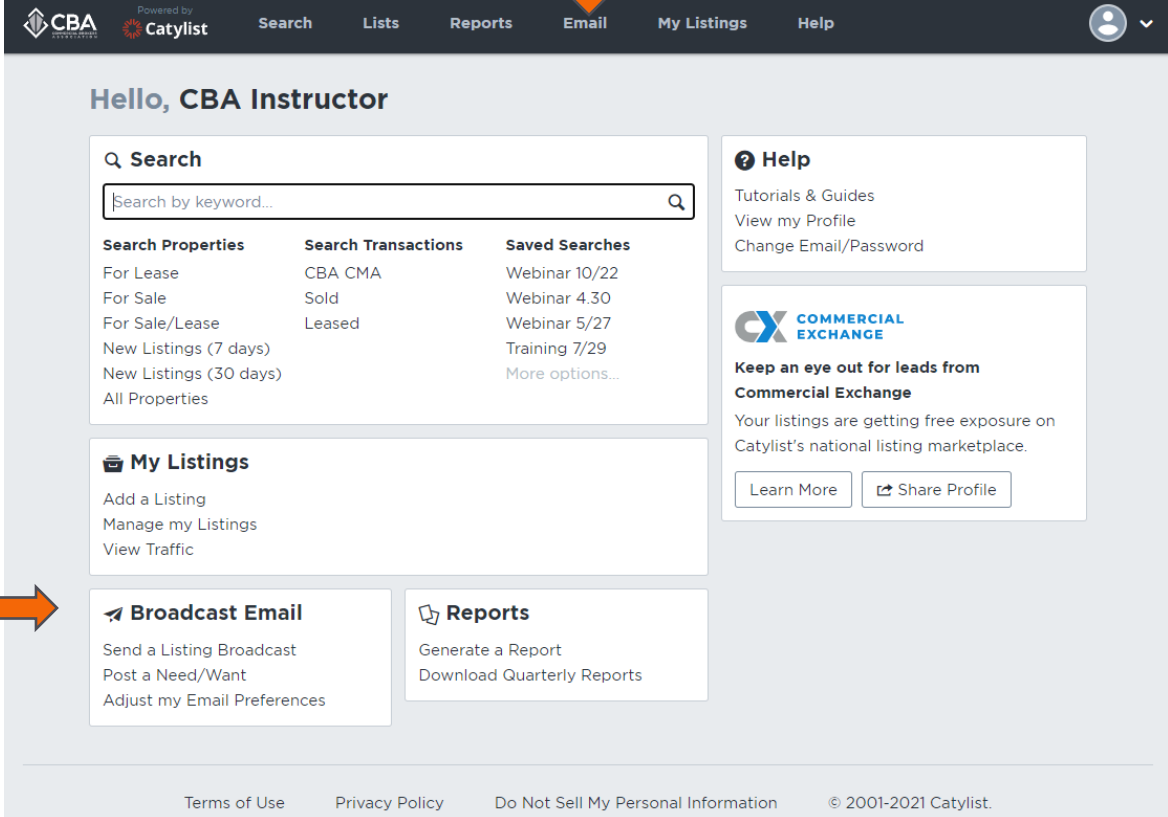
# MARKETING TOOLS

In this guide we will be reviewing your Catylist-powered e-mail marketing options

# WHERE TO ACCESS YOUR NEW E-MAIL OPTIONS ON YOUR CATYLIST-POWERED DASHBOARD

Clicking **Email** on the top black tool bar will take you into your e-mail dashboard

Clicking on the **Broadcast Email** links will quick jump you into the different areas covered in this guide



The screenshot shows the Catylist dashboard interface. At the top, a black navigation bar contains the CBA logo, the Catylist logo, and menu items: Search, Lists, Reports, Email, My Listings, and Help. An orange arrow points to the 'Email' menu item. Below the navigation bar, the dashboard is personalized for 'CBA Instructor'. It features a search bar, a 'My Listings' section with links for 'Add a Listing', 'Manage my Listings', and 'View Traffic', and a 'Broadcast Email' section with links for 'Send a Listing Broadcast', 'Post a Need/Want', and 'Adjust my Email Preferences'. An orange arrow points to the 'Broadcast Email' section. To the right, there is a 'Help' section with links for 'Tutorials & Guides', 'View my Profile', and 'Change Email/Password', and a 'COMMERCIAL EXCHANGE' section with a 'Keep an eye out for leads from Commercial Exchange' message and links for 'Learn More' and 'Share Profile'. The footer contains links for 'Terms of Use', 'Privacy Policy', 'Do Not Sell My Personal Information', and a copyright notice for '© 2001-2021 Catylist'.



# E-MAIL DASHBOARD

**Preferences** are how you can opt-in or out of receiving e-mails from the membership via the new system

**Sent History** will show e-mails that have been sent to you from the system and it also acts as your broadcast e-mail tracker. This will show you how many CBA members received your broadcast e-mails and how many CBA members opened the broadcast e-mail.

**New Need/Want** the system now allows you to send an e-mail to the membership to let them know what you are looking for.

**New Listing Broadcast** allow you to promote your listings to other CBA members.

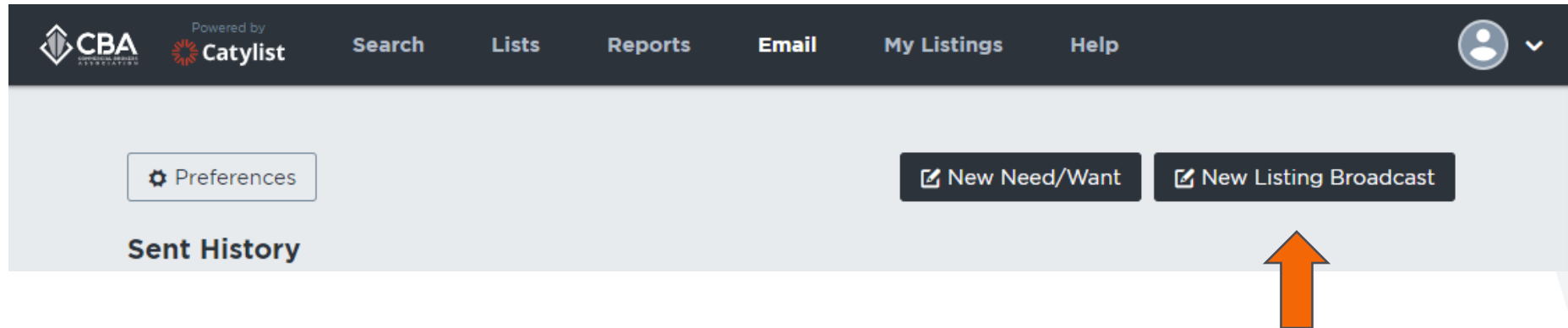
The screenshot shows the CBA Catylist E-mail Dashboard. The navigation bar includes 'CBA Catylist', 'Search', 'Lists', 'Reports', 'Email', 'My Listings', and 'Help'. Below the navigation bar are buttons for 'Preferences', 'New Need/Want', and 'New Listing Broadcast'. The main content area is titled 'Sent History' and contains a table with columns for Date, Status, Type, Subject, Recipients, and Opens. The table lists several e-mails sent on 12/16/2021 at 01:00, all with a status of 'Sent' and a type of 'EXPIRATION'. The subjects are various listing expiration notices. The Recipients and Opens columns show the number of recipients and opens for each e-mail. At the bottom of the table, there is a pagination control showing '9,625 Emails' and a 'Next' button.

Date	Status	Type	Subject	Recipients	Opens
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	1	1
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	1	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	1	1
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	0	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	1	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 8047 W Emerald St	1	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 0 S Millview Ln	0	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 3116 E State St	1	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 3116 E State St	0	0
12/16/2021 01:00	Sent	EXPIRATION	Listing expiring in 15 days: 3116 E State St	0	0

9,625 Emails [Prev](#) [1](#) [2](#) [3](#) [4](#) [5](#) ... [963](#) [Next](#)



# SENDING A BROADCAST E-MAIL



Broadcast e-mails or “Eblasts” allow you to promote your listings to other CBA members.



# SENDING A BROADCAST E-MAIL

## Choose Property

Select which property you'd like to include in the broadcast.

My Properties (select one)

Search		
<input type="radio"/>	12011 113 Ave NE	Land 100 SF
<input type="radio"/>	12007 113 Ave NE	Retail 1,200 SF
<input type="radio"/>		Land 9.71 Acres
<input type="radio"/>	Big Tail Rd	Land 1,234 SF
<input checked="" type="radio"/>	12131 113th Ave NE	Office 10 SF - 1,000 SF
<input type="radio"/>	Touchstone Kirkland Building	Office 1,000 SF

6 Properties

**Step 1:** Select the property you would like to send a broadcast out on

## Choose Listings & Flyers

Select which listings and flyer you'd like to include in the broadcast.

	12131 113th Ave NE	Office	10 SF - 1,000 SF
<b>Listings</b> (can select multiple)			
<input type="checkbox"/>		Office For Lease	10 SF
<input checked="" type="checkbox"/>		Office For Lease	100 SF
<input checked="" type="checkbox"/>	Suite 7	Office For Lease	1,000 SF

The selection does not include any available flyers.

**Step 2:** Select the listing(s) you would like to send a broadcast email on



# SENDING A BROADCAST E-MAIL

**Step 3:** Make the changes to the title and the message of the broadcast e-mail here if you would like to make them.

If you do not change the title, the system will generate based on the type of listing, location, and square feet available of the listings.

If you do not change the message, it will simply pull the comments directly from your listing. Making changes here will not change your listing comments – just the message in your broadcast e-mail.

## Custom Information ⓧ

Compose the custom title and message to include in your broadcast.

Title:

Message:

← Back

Cancel Next →

\*Please remember if you're making a change to the text should not be in all caps.



# SENDING A BROADCAST E-MAIL

**Step 4:** Review your broadcast e-mail. Make sure that the image is attached, and the text is correct. If you need to make a change you can simply hit the back button.

You will also need to fill in the reason for the broadcast e-mail to be sent out such as it has been four weeks, has there been a change in price, etc.

Once you confirm and update these details you can click “Submit” and the broadcast will go to the CBA staff for review.

These broadcast e-mails are reviewed regularly throughout the day, once your broadcast has been approved and sent out you can track the number of recipients in your E-mail dashboard.

The screenshot shows the 'Finish' step of the broadcast e-mail process in the CBA Catalyst system. The interface includes a navigation bar with 'CBA Catalyst', 'Search', 'Lists', 'Reports', 'Email', 'My Listings', and 'Help'. The main content area displays a preview of the broadcast e-mail, which includes the CBA logo, the text 'Office for Lease in Kirkland (1,000 SF)', a Google Street View image of a modern office building at 12131 113th NE, Kirkland, WA 98034, and a smaller listing card for '12131 113th NE, Suite 7' with a 'View Listing' link. Below the preview, there is a text input field for 'Message to the CBA Staff' and a 'Submit' button.



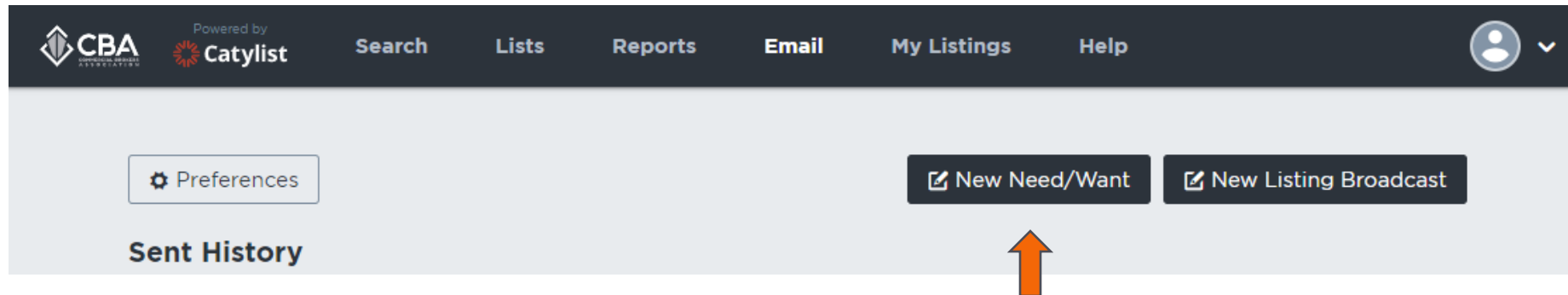
# BROADCAST E-MAIL GUIDELINES

- You may send out a broadcast on a particular listing once every 4 weeks unless there is an extenuating circumstance (Example– major price reduction or upcoming broker open house)
- Brokers are allowed to send a maximum of 4 broadcast emails per day.
- Duplicates or too many requests for the same Broadcast will be rejected
- Flyers attached to the listing must have the same broker information. No non-member contacts or competitor links are allowed
- You will now track your broadcast e-mail information through the sent history in your e-mail dashboard
- If your Broadcast was not approved for any reason such as missing information, you will be sent an email from CBA explaining the reasons it was not approved. Please respond back to us with any missing information or make the appropriate updates to ensure your Broadcast gets out in a timely manner
- If you want to receive your own broadcast, you will need to ensure your preferences are updated to receive Broadcasts for the specific areas and asset classes of this listing
- The broadcast requests are checked by CBA every 2 hours to ensure that they are send out in a timely fashion





# POSTING A WANT/NEED



The Needs and Wants email option is designed for you to send out your specific needs to the membership to see if they have any properties that would best fit what you're looking for if you've been unsuccessful with finding the proper spaces via a traditional search



# POSTING A WANT/NEED

## Post a Need/Want

Needs/Wants are properties that you (or your client) seek to purchase or rent.

This requirement will be broadcast via email to members who have matching preferences.

Looking for...  Sale  
 Lease  
 Sale or Lease

Property Type

Locations

Title

Description

In order to post a want/need to the membership you will need to fill in the following categories:

**Looking For** choose if you want just sale listings, lease listings or both types of listings.

**Property Type** allows you to select the specific asset class you are looking for

**Locations** can be entered as a city, a state, a county, a zip code, and you can even use the old CBA Submarkets\*.

**Title** give a brief idea of what you're looking for

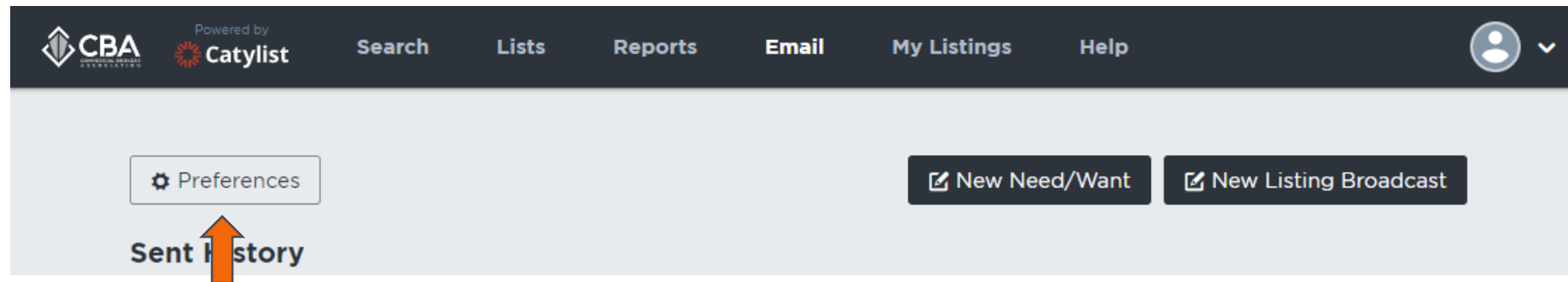
**Description** this is where you'll want to get very specific about what you're looking for so that when the membership reaches out to you their listing best fits your needs.

\*In order to use the old CBA Submarket you must first type CBA and then the name of the submarket



# ADJUSTING YOUR EMAIL PREFERENCES

Opting in and out of receiving broadcast e-mails



To opt-in to receiving broadcast e-mails, you will want to set up your e-mail preferences. You will not receive any broadcast or Want/Needs e-mails if you have not set up your preferences.



# ADJUSTING YOUR EMAIL PREFERENCES

In order to receive broadcast e-mails for specific locations and asset classes you will need to first remove the "Washington + All Types + Sale or Lease" and set up new subscriptions. To set these up you will need to specify the location, property types, and type of listing you would like to receive broadcast e-mails on.

**Location** can be entered as a city, a state, a county, a zip code, and you can even use the old CBA Submarkets\*.

**Property Type** allows you to select a specific asset class or you can keep it open to receiving any type of property in the area of interest you select

**Listing Type** choose if you want to see just sale listings, lease listings or both types of listing.

## Areas and Types of Interest

Specify the location and property type combinations for which you'd like to receive broadcast email.

Seattle, WA	● Retail	Sale	Remove
CBA Fremont/Ballard	● Industrial	Sale or Lease	Remove
98042	Any Type	Lease	Remove

### New subscription

Area of interest (city, county, sub) Any Type ▾ Sale or Lea ▾ Add

\*In order to use the old CBA Submarket you must first type CBA and then the name of the submarket



# ADJUSTING YOUR EMAIL PREFERENCES

**Email Receipt Preferences**  
Choose which kinds of emails you would like to receive.

**Needs/Wants**  
Messages about a particular need for commercial real estate, posted by a member or the general public.

**Leads**  
Messages about recent leads for active listings.

Viewed  Saved  Downloaded Flyer  Viewed Contact Info  Emailed Agent

**Listing Broadcasts**  
Messages with one or more property listings attached, sent by a Catylist Network member.

**Messages from Catylist**  
Infrequent messages about new features, training sessions, and related products and services.

Your email receipt preferences allow you to opt-in to receiving the following types of e-mails from the system and allow you to select how soon some of these e-mails come to you.

**Secondary Emails**  
Have others receive emails that were sent to you.

**Alternate Address**  
Route all of your emails to a different address instead of your primary one.

**Copied Addresses**  
Carbon copy another email address on all messages you receive.  
(none specified)

**Blocked Senders**  
Any messages sent to you from the emails below will be blocked.  
(none specified)

If you do not want the system emails to go to the email account attached to your CBA account you can enter the email you'd prefer them to go to here.

If you would like a second e-mail address to receive all the same messages that you do, you can enter that second e-mail here.

If you are getting emails from one sender that just don't match your needs and somehow they keep getting through the filter, you can choose to block somebody from sending you a broadcast at any time without them knowing.

