MOODY'S ANALYTICS | CRE

Moody's Analytics Catylist Transition Guide

Getting Started

As you begin your migration over to the new Catylist platform, please reference this guide for tips to make your migration seamless.

Log In

Going forward all user names will be changed to your email address. When logging into the new platform, please enter your email address and your existing password.

Dashboard and Top Navigation

The platform layout and interface are different, please click around and orient yourself with the new navigation links at the top of the screen and within the different dashboard sections.

Check Your Profile

Click on the picture at the top right of the screen, then click "My Profile". This is the profile other users will see, check for accuracy and click "Edit Profile" to make any adjustments. If you wish to change your password, you can do so under the "Change Password" button here.

Configure Email Preferences

Click on "Email" at the top of the screen, is page is where you'll send listing broadcasts and post needs/wants. Click "Preferences" to update your user preferences, double check the "Areas and Types of Interests" to ensure the property types and markets you care about are configured properly, and make any adjustments as necessary.

Understanding Terminology Changes with Properties and Listings

The chart below shows a few important differences you should be aware of. These changes may take some time to get used to, but they are critical to some of the powerful things the new platform can do.

	Old Platform	New Platform
Properties **Listings & Spaces**	– Each listing has its own property record – There is no single source of truth for a building – No simple way to bring together all the information related to a specific building – A single "Listing" would be created to represent all the available spaces in a building	– The new platform is property-centric – Property records are permanent and shared by everyone – All listings, transaction history, ownership, tenant information, analytics, etc. are tied to these permanent records – Each available space is considered its own listing, allowing for more flexibility with how spaces are marketed

Check My Listings

Review your listings during the migration process. All of the properties you represent will be under "My Listings", here you can view the listings associated with each property by clicking the "Show spaces" or "Expand All". Use the search bar at the top of the various sorting and filtering options, allowing you to drill down by location, type, etc.

Review Listings for Accuracy

- Are all of your listings accounted for?
- Do they all display the correct status, price, size, etc.?
- Are there any duplicate or outdated records that need to be dealt with?

Listing Changes to Keep in Mind

- Do not add or edit listings on the new platform during the test drive period. The information is actively synchronizing from the legacy platform, any changes made during this time will be removed later.
- All listings are now attached to a separate property/building record. In the future, when editing, you can toggle between these by clicking "Property/Building" or "Listings" in the upper left corner of the edit page.
- If there appears to be an error and your listing was tied to an incorrect property, first verify that the pin is correctly placed on the map on the legacy platform. This will help your listing sync to the correct parcel/building on the new platform.
- There are two types of listing photos, these options can be found when editing a listing. Make sure the photos are properly categorized.
- Common Listing Photos: are displayed on all the spaces listed by your company within a given building. These are typically shots of the exterior and common areas.
- Photos for this specific listed space: are photos of the interior space that is being listed.
- Incomplete listings will not sync to the new platform and inactive listings will have a new status as "Hold". You can view these by changing which filters are selected under the "Type".
- Individual Listing IDs will change so please check to see if you are using current IDs for promotion and plan on making adjustments after the migration.
- Once you're done reviewing your listings, click the "Verify All" button at the top, you need to verify your listings every 45 days or they'll be taken offline as outdated.

Run Test Searches

When testing out the new search engine, keep the following in mind:

- Search filters are situated across the top in a white bar, organized by Location, Type, Prize/Size, and More.
- The property count in the top bar represents the buildings/land returned in the search results. These are represented on the map by the color-coded dots.
- A map-based interface is the default display with the option to change to "List View" or "Grid View" towards the top right.
- Listing search results are grouped by property. Once you've clicked a property result, make sure to scroll down below the property details to see the available listings for that property.

Set Up Saved Searches

Saved searches will have to be recreated in the new platform. This is done by conducting a search with the desired filters, then click the "Saved Searches" button near the top right, and selecting "Save Current Search". You will be able to name the search, set a notification frequency, and choose whether or not to include a client email address to receive notifications. To run or edit this search in the future, just click on the "Saved Searches" button and then select "View Saved Searches".

Hotsheets

If you are interested in receiving Hotsheets, we recommend running a search for the kinds of properties you're interested in, then saving it and choosing a notification preference. The system will then email you whenever new properties, listings, or comps pop up that match your criteria.

Recreate Active Catalogs/Lists

"Catalogs" on the legacy platform are now called "Lists" on the new platform. If there are any catalogs still actively being used, they will need to be recreated as lists on the new platform.

Create Reports

In the new platform, there are a lot of additional report format options available.

Frequently Asked Questions

Where are my Business Opportunities Listings?

Business Opportunities are now supported on the new platform, but we are not able to automatically migrate existing business opportunity listings. Please plan on recreating these during the test drive period.

Can I still send general member emails?

There will no longer be a "Member to member" broadcast email option. Broadcasts are limited to Listing Broadcasts that are distributed based on recipient email preference.

Where can I get additional training?

Moody's Analytics CRE offers weekly training webinars and training videos and tutorials from the "Help" section within the new platform.

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