



## PAYMENT STATUS DETAIL REPORT

This report illustrates specific payment status details for **all** your invoiced members including sponsors, corporates and individuals throughout the membership year.

### How to Access

Log into the NAIOP portal from the homepage ([www.naiop.org](http://www.naiop.org)) and use your email address and member number (unless you updated password) as User ID and password. Once logged in, you will see your name appear in the upper right hand of the homepage. Click on your name and choose Manage My Account. Then choose Chapter Portal to access all reports. Select Payment Status Detail.

The screenshot shows the NAIOP portal interface. At the top left is the NAIOP logo. To its right are navigation links: About Us, Chapters, National Forums, Research Foundation, and NAIOP Connect. In the top right corner, the user's name 'Angela Darden' and a 'Sign Out' link are visible. Below the navigation links is a horizontal menu with options: MY ACCOUNT, CHAPTER PORTAL (highlighted with a red arrow), RENEW MY MEMBERSHIP, MEMBER DIRECTORY, EVENTS, CERTIFICATES, and PUBLICATIONS. Below this menu is a green header bar that reads 'MY PRIMARY CHAPTER: ALABAMA'. Underneath this header is a grid of report options. A red arrow points to the 'PAYMENT STATUS DETAIL' option in the second row, first column of the grid.

MY PRIMARY CHAPTER: ALABAMA			
MY CHAPTERS LIST	MEMBER SEARCH	MEMBER TOTALS PER CHAPTER	MEMBERSHIP BREAKDOWN REPORT
<b>PAYMENT STATUS DETAIL</b>	MEMBERS PAYMENT STATUS	CHAPTER LEADERSHIP	TERMINATED MEMBERSHIPS
UNIVERSITY MEMBERSHIPS	POWER USER	CHANGE REPORT	PROSPECTS

### Report Overview Features

Data cannot be filtered on screen. To filter export into an Excel spreadsheet (instructions are at the top of page 4) . Information on the report will be sorted in alpha order by company regardless of the parameters used.

#### *Fields included:*

- Benefit Status – Renew, New, Reinstated or Terminated. (Column E)
- Invoice Type – Group or Individual. This identifies how a member was billed. Occasionally some Corporate members request an individual invoice and individual members may request a Group invoice. (Column AJ)
- Termination Date (Column N)
- Pro Rate Expiration Date – This illustrates the *exact* date a pro-rated membership expires. If this field is blank the member is not a pro-rate *or* the membership is a transfer. (Column M)

- Corporate Membership. This will help you identify who is included in a Corporate membership. (Column AK)
- Do Not Renew. Members or chapters may inform us when an individual will not be renewing. This indicates they are no longer receiving invoices or reminder emails. (Collumn P)

## Operations

*To determine who has paid/not paid over the course of the year:*  
Leave Date Paid From and Date Paid To boxes shaded.

### Report Viewer

The screenshot shows a web form titled "Report Viewer". At the top left are two green buttons: "PREVIOUS" and "PRINT". Below these are two date input fields, "Date Paid From:" and "Date Paid To:", both containing the placeholder "mm/dd/yyyy" and having a light beige background. Each date field has a checked checkbox labeled "NULL" below it. To the right of the "Date Paid To:" field is a "View Report" button. Below the date fields are two more input fields: "Invoice Paid" with a dropdown menu showing "Yes & No" and a downward arrow, and "Cycle Year" with a text input field containing "2023". At the bottom of the form is a light beige shaded area. Red arrows point from the text above to the "Date Paid From:" and "Date Paid To:" fields, and from the text below to the "Invoice Paid" dropdown and "Cycle Year" field. A green arrow points from the text below to the "View Report" button.

Enter Invoice Paid – Yes&No and the current Cycle Year

Choose View Report

*To sort by paid status (paid or unpaid):*

Leave Date Paid From and Date Paid To boxes shaded.

## Report Viewer

The screenshot shows the 'Report Viewer' form. At the top left are two green buttons: 'PREVIOUS' and 'PRINT'. Below them are two date input fields: 'Date Paid From:' and 'Date Paid To:'. Both fields contain the placeholder text 'mm/dd/yyyy' and are shaded light green. Below each date field is a checked checkbox labeled 'NULL'. To the right of the 'Date Paid To:' field is a 'View Report' button. Below the date fields are two more input fields: 'Invoice Paid' with a dropdown menu showing 'Yes' and a downward arrow, and 'Cycle Year' with a text box containing '2023'. A horizontal scroll bar is visible below these fields. Red arrows point from the text above to the 'Date Paid From' and 'Date Paid To' fields. A green arrow points from the text below to the 'View Report' button.

Enter Invoice Paid – either Yes or No and current Cycle Year

Choose View Report

*To sort by date(s) paid:*

**UNCHECK THE NULL CHECKBOX** for both Date Paid From and Date Paid To. Enter information in Date Paid From and Date Paid To boxes.

## Report Viewer

The screenshot shows the 'Report Viewer' form. At the top left are two green buttons: 'PREVIOUS' and 'PRINT'. Below them are two date input fields: 'Date Paid From:' and 'Date Paid To:'. Both fields contain specific dates: '01/01/2023' and '02/28/2023' respectively. Below each date field is an unchecked checkbox labeled 'NULL'. To the right of the 'Date Paid To:' field is a 'View Report' button. Below the date fields are two more input fields: 'Invoice Paid' with a dropdown menu showing 'Yes' and a downward arrow, and 'Cycle Year' with a text box containing '2023'. A horizontal scroll bar is visible below these fields. Red boxes highlight the date input fields. A blue oval highlights the 'NULL' checkboxes. Red arrows point from the text below to the 'Invoice Paid' and 'Cycle Year' fields. A green arrow points from the text below to the 'View Report' button.

Choose Yes for Invoice Paid, enter the current Cycle Year then View Report

To sort by other fields (member number, Corporate Status, invoice type, etc.) export to an Excel spreadsheet. This is found on the line directly above the report.



CHAPTER	MEMBERID	MEMBERCATEGORY	BENEFIT STATUS	COMPANYID	COMPANYNAME	SPONSORLEVEL	PERPHONE
Alabama	636578	Alabama Associate Full	Renew	299125	Ai Corporate Interiors, LLC		205-371-4599
Georgia	681541	Alabama Associate Developing	New	149334	ARCO Design/Build		770-541-1700

## Notes/Issues

**Blank Expiration Date field:** These are members who requested an invoice and have not yet paid.

**Pro-Rates:** These are members who joined between April 1 and September 30. They are invoiced with other members during the regular renewal cycle and show an expiration date of Dec. 31, *but payment is not actually due until their pro-rate expiration date (Column M).*

They can be identified by their Join Date (column K). Their actual expiration date can be calculated as the end of the 12th month from the month joined. E.g., Membership Join Date of June 20 will expire May 31 of the following year.

## Voluntary Contributions:

Voluntary 1 column displays non-PAC contributions.

Voluntary 2 column displays PAC contributions.

- If your chapter has two PACs, these amounts are currently being combined in column 2. In the meantime, you can check your most recent remittance report to identify which contribution was paid.

If dues were paid, but voluntary contributions were not, \$0 is displayed in the voluntary billed columns, even though all applicable members were billed national and chapter voluntary contributions. If the voluntaries were paid, the amounts show in both the paid and billed columns.

## Multi-Chapter members:

If a member belongs to three or more chapters, the dues are combined on your report in the multi-chapter dues column.



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**Sponsorships:**

Sponsorships amounts show under the Full member's record.

The report is unable to accurately capture amounts/data for dual sponsorships. Please contact [membership@naiop.org](mailto:membership@naiop.org) for further clarification or reference your recent remittance report.

Sponsorship invoices include voluntaries whether the membership is new or a renewal. The voluntaries are always for the corporate membership amounts.