NAIOP
COMMERCIAL REAL ESTATE DEVELOPMENT ASSOCIATION

INSTRUCTIONS FOR VIEWING, ENTERING AND PRINTING CHAPTER PROSPECT LIST

Please contact Beth Gulding via email (gulding@naiop.org) if you encounter any problems accessing your data.

The Prospect function shows all chapter prospects in the NAIOP Corporate database entered over the past two years. This is a dynamic list and will be constantly updated. These instructions will also show how to enter your chapter prospects directly into the NAIOP Corporate database.
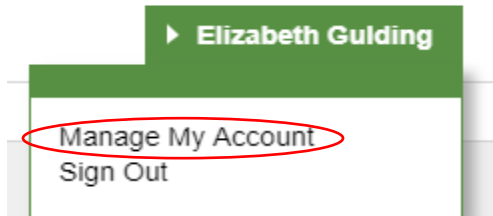
How to Access NAIOP Corporate Prospects

Log into the NAIOP portal from the homepage (www.naiop.org) by choosing "Sign In" and using your email address and member number as password (unless you changed your password).
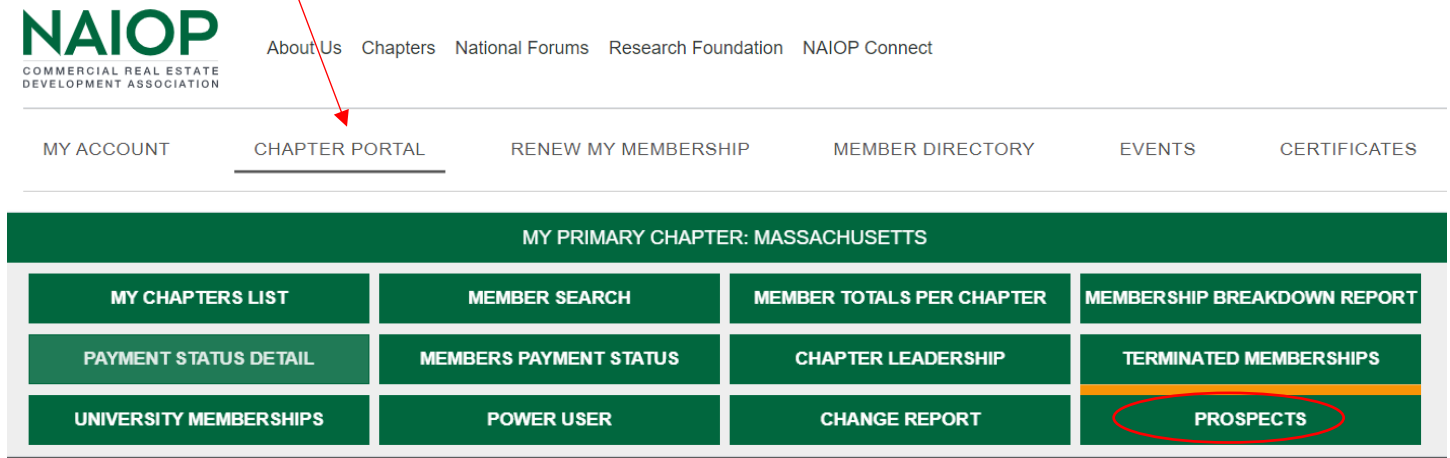
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Sign into your existing user account

Username/email

gulding@naiop.org

Password

••••••

SIGN IN

Once you log in, you will see your name appear in the upper right hand of the homepage. Click on your name and choose Manage My Account. This will take you to your account page.

Choose Chapter Portal to have access Prospects.

The Prospects list can be downloaded into an Excel spreadsheet by choosing Prospect Details Export View, then EXPORT ALL TO EXCEL button.

The information given includes:

Contact Number	Email Address
First, Last names	Phone Number
Title	Prospect Source
Company	Prospect Code
Street Address, City, State/Province, Zip/Postal Code	Date Prospect Created

Create Member Invoice shows that the chapter requested an invoice through the Power User function.

The Prospect Source indicates where the name originated:

Prospect Source

BisNow
Chapter Event
Chapter Referral
Corporate Event
Direct Contact
GlobeSt
LinkedIn
Member Referral
NAIOP Website
Webinar
Websource
ZoomInfo

The Prospect Code is added detail on the Corporate source such as the name of the webinar or event.

Chapters can add prospects to the NAIOP Corporate database through the Power User function. See Power User instructions for additional information.