

## 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 (<u>www.naiop.org</u>) by choosing "Sign In" and using your email address and member number as password (unless you changed your password).

	P	> ABOUT NAIOP	> BUYER\$ GUIDE	> SPONSOR/ADVERTISE	> CAREER CENTER	> DEVELOPMENT MAGAZINE
My NAIOP: Ev	ents Publication	S		-	Sign In	Join NAIOP
<b>Sign into you</b> Username/email	Ir existing us	er accol	unt			
gulding@naiop.org						
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.

Elizabeth Gul Manage My Account Sign Out	ding		
Choose Chapter Portal to h	ave access Prospects.		
COMMERCIAL REAL ESTATE DEVELOPMENT ASSOCIATION	hapters National Forums Research Fou	Indation NAIOP Connect	
MY ACCOUNT CHAPTER PC	RTAL RENEW MY MEMBERSH	HIP MEMBER DIRECTORY	EVENTS CERTIFICATES
	MY PRIMARY CHAPTE	ER: MASSACHUSETTS	
MY CHAPTERS LIST	MEMBER SEARCH	MEMBER TOTALS PER CHAPTER	MEMBERSHIP BREAKDOWN REPORT
PAYMENT STATUS DETAIL	MEMBERS PAYMENT STATUS	CHAPTER LEADERSHIP	
UNIVERSITY MEMBERSHIPS	POWER USER	CHANGE REPORT	PROSPECTS

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

PROSE	PECTS	PROSPEC	CT DETAILS RT VIEW					
Prosp expor	ects 🗷	xport V	ïew					
Contact Number	First Name	Last Name	Title	Company	Street Address	City	State/Province	ZIP/Posta Code

The information given includes:

Contact NumberEmail AFirst, Last namesPhoneTitleProspecCompanyProspecStreet Address, City, State/Province, Zip/Postal CodeDate Prospec

Email Address Phone Number Prospect Source Prospect 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.