Affiliate Portal Add/Drop <u>Existing</u> Accounts Tab

Below follows a description of each of the functions of the Add/Drop Existing Accounts tab as well as step-by-step instructions on searching for, adding membership to, and removing membership from, existing accounts. For questions or additional help with anything covered in this guide please contact Olivia Foroughi at <u>oforoughi@naahq.org.</u>

Functions

FUNCTION: Viewing, Adding and Removing Membership

- The Add/Drop Existing Accounts tab on the Affiliate Portal allows you to easily search for, and view, all <u>existing members and nonmembers</u> in your association's territory.
- Additionally, you can quickly add membership to, or remove membership from, any existing account using the + and x functions.
- See below for step-by-step instructions on viewing, adding and removing membership.

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,	Add/Drop Existing Accounts												
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	Membership In	formation				Lease P	rogram						
	Add/Remove Membership	Member	NAA ID	Company	Management Company	City/State	Member Type	Lease Status	BlueMoon Account No	Last Lease Order Date	Lease Balance		
	•	\checkmark	1066347	10 Cooper St LP dba Bel Lindo Apartments		Brooklyn,NY	Owner	Ineligible			0		
	8	V	1235301	10 Hanover Square	UDR, Inc.	New York, NY	Property	Active	NY11071550	2020-07-01	0		
	8	V	2387427	10 West	Inland Residential Real Estate Services, LLC	Long Beach,NY	Property	Pending	NY20083101	2020-08-31	0		
	0		2341094	101 Macdougal Street	Westminster Pillar Management LLC	New York, NY	Property	Deactivated	NY20010202	2020-01-02	0		
	8	~	2341152	104 East 7th Street	Westminster Pillar Management LLC	New York, NY	Property	Deactivated	NY20010700	2020-01-01	0		
	•		2144195	107-145 West 135th Street	Winn Residential	New York,NY	Property	Eligible			0		
	•		2144196	1085 Washington Avenue Apartments	Winn Residential	Bronx,NJ	Property	Eligible			0		
	•		951482	114 East 122nd Street Apartments, LLC		New York,NY	Management Company	Ineligible			0		
	•		2174094	114 East 40th Street		New York,NY	Property	Eligible			0		

Instructions: Viewing, Adding and Removing Membership

Viewing Members and Nonmembers

You can easily search for existing member and nonmember accounts in your territory on the Add/Drop Existing Accounts tab. To do this:

1. Membership Updates

Make sure you have selected the Add/Drop Existing Accounts tab at the top of the page within the Affiliate Portal.



2. Select Affiliation

Once on the Add/Drop Existing Accounts page, affiliate staff should select the association for which they wish to view all members and nonmembers. Once selected, all information will display.

Select Affiliation :	
All	\$

3. Sort Data

All information can be sorted by column. To sort the data by a particular column, click on the column heading (within the orange box below).

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	Add/Remove Membership	Member	NAA ID	Company	Management Company	City/State	Member Type	Lease Status	BlueMoon Account No	Last Lease Order Date	Lease Balance
	•	~	1066347	10 Cooper St LP dba Bel Lindo Apartments		Brooklyn,NY	Owner	Ineligible			0
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	8	*	2387427	10 West	Inland Residential Real Estate Services, LLC	Long Beach,NY	Property	Pending	NY20083101	2020-08-31	0
	•		2341094	101 Macdougal Street	Westminster Pillar Management LLC	New York,NY	Property	Deactivated	NY20010202	2020-01-02	0

4. Search

You can search for a particular member or nonmember account using the search bar in the upper right-hand corner of the page. After you type in their NAA ID, click on the blue search button (pressing enter on your keyboard will not trigger the search).

Search	

Adding Membership

You can easily add membership to existing accounts in the Affiliate Portal.

1. First, follow steps 1 and 2 under Viewing Members and Nonmembers above.

2. Add Membership

Find the account that you would like to add membership to. Then, click the \bigcirc in the far left-hand column titled Add/Remove Membership.

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	0		2341094	101 Macdougal Street	Westminster Pillar Management LLC	New York,NY	Property	Deactivated	NY20010202	2020-01-02	0			

*If you need assistance regarding adding membership, please contact NAA's Client Solutions Center at 833-86-MYNAA, and one of our specialists will be happy to help.

Removing Membership

You can easily remove membership from existing accounts in the Affiliate Portal.

1. First, follow steps 1 and 2 under Viewing Members and Nonmembers above.

2. Remove Membership

Find the account that you would like to remove membership from. Then, click the in the far left-hand column titled Add/Remove Membership.

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