

ARISTOTLE
Now You Know™

Aristotle 360

PAC Management System
User Guide



What is a record?

In Aristotle 360, there are four types of Records: Individuals, Organizations, Legislators, and Committees. Local Association executive officers and staff will primarily be reviewing their member information (Individual records).

Individuals: This type contains information about specific people, such as members, association staff, and affiliates.

Committees: This type typically includes those organized groups whose primary function is to influence or participate in the political process. Examples of Committees include Political Action Committees, Political Party Committees, State Party Committees, and other types of political committees

Legislators: This type contains information about elected officials at all levels, for example, U.S. Senators and Representatives, Governors, members of State Legislatures, County Commissioners, and local elected officials.

Organizations: This type typically contains information about all of the organized groups you work with except those that qualify as Committees. Examples of your Organizations may include your vendors, employers, offices, associations, local boards, and banks.

Quick Search



Individual



Quick Search

Welcome To Homepage



The **Homepage** gives you quick access to your data and important information. It is the central landing page between the Homepage and the Dashboard.

What would you like to do today?

DATA ENTRY

Search Individual Records

To search for a member, you can enter either a NRDS ID or name into the Search field of the Quick Search panel located in the upper left-hand corner of your screen. The drop box below automatically defaults to Individual, but you can also search here for Organization, Legislator and Committee.

Search Individual Records

Individual records contain a member's primary information, contact information, and employer. There are also a series of panels which can be expanded that contain additional information about the member.

Individual John S Smaby

Basic Information				
Prefix:	First Name:	Middle:	Last Name:	Suffix:
▼	John	S	Smaby	▼
Mail Name: John Smaby		Voter ID: 2000.00		
Salutation 1: John		Source ID: 502000437		
Employer: Edina Realty, Inc.		Occupation: Real Estate Broker		
Federated Access Groups				
MN:844 - Minnesota Association of Realtors x				
MN - Minneapolis Area AOR - Minneapolis Association of Realtors x				
NC:864 - North Carolina Association of Realtors x				



Upload Photo...
Remove Photo

Additional Details	(Click to Expand\Hide)
Custom Fields	(Click to Expand\Hide)
Activities	(Click to Expand\Hide)
Receipts	(Click to Expand\Hide)
Pledges	(Click to Expand\Hide)
Disbursements	(Click to Expand\Hide)
Notes	(Click to Expand\Hide)
Events	(Click to Expand\Hide)
Groups	(Click to Expand\Hide)
District Information, Relationships & Voting History	(Click to Expand\Hide)

Individual Records

- The **Custom Fields** panel contains the NAR Import sub-panel, which, once expanded, shows the member type, status, and association information.
- The **Custom Fields** panel also contains a member's Major Investor giving information. By expanding any of the Major Donor sub-panel, users can see when the member has received a pin, the date it was sent, and any comments on the award.

Custom Fields

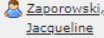
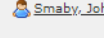
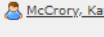
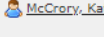
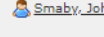
(Click to Expand\Hide)

Add New Group

Custom Group Name	Remove
 Designation	✖
 Fundraising Metrics	✖
 Major Donors - 2001	✖
 Major Donors - 2003	✖
 Major Donors - 2004	✖
 Major Donors - 2005	✖
 Major Donors - 2007	✖
 Major Donors - 2008	✖
 Major Donors - 2009	✖
 Major Donors - 2010	✖
 Major Donors - 2011	✖
 Major Donors - 2012	✖
 Major Donors - 2013	✖
 Major Donors - 2014	✖
 Major Donors - 2015	✖
 Major Donors - 2016	✖
 Major Donors - 2017	✖
 Major Donors - 2018	✖
 Major Donors - 2019	✖
 Major Donors - 2020	✖
 Major Donors - 2021	✖
 Major Donors - 2022	✖
 NAR Import - 5020	✖

Individual Records

- The **Activities** panel shows communications sent to the member
- The **Groups** panel shows a list of all the groups (state and national) to which the member belongs.
- The **Receipts** panel shows all the contributions, including the vetted contributions between the state and NAR. It is recommended using the Individual Summary report to review a member's giving history.
- The **Pledges** panel shows a member's Major Investor pledges.

Activities (Click to Expand/Hide)							
☐ Open ☒ Closed ☒ Exclude Action Alert		Filter By Activity Type: All ▼					
	Subject	Sender	Receiver	Status	Due	Completed	Program
☒	You're on the Road to the Hall of Fame!	 Zaporowski, Jacqueline	 Smaby, John	Opened		6/13/2022	
☒	2022 President's Circle first \$500 past due	 McCrory, Katelin	 Smaby, John	Opened		6/1/2022	
☒	2022 President's Circle Reminder	 McCrory, Katelin	 Smaby, John	Opened		5/25/2022	

Groups (Click to Expand/Hide)				
View	Group	Category	Added On	Remove
	2022 RHOF 75K	RPAC	6/10/2022	
	2022 MYM GR_PRs_0420	RPAC	4/26/2022	
	2022 MYM GR_PRs_0411	RPAC	4/11/2022	
	2022 NAR Credentials and Cam... NAR - 2022 Committees		4/1/2022	

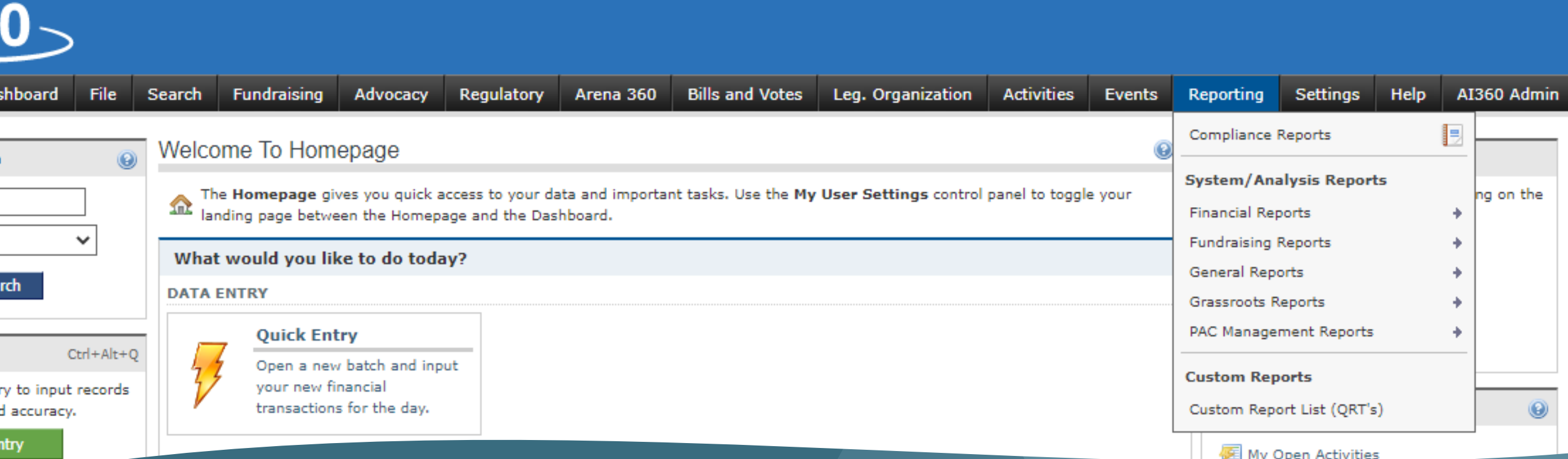
Additional Details	(Click to Expand/Hide)
Custom Fields	(Click to Expand/Hide)
Activities	(Click to Expand/Hide)
Receipts	(Click to Expand/Hide)
Pledges	(Click to Expand/Hide)
Disbursements	(Click to Expand/Hide)
Notes	(Click to Expand/Hide)
Events	(Click to Expand/Hide)
Groups	(Click to Expand/Hide)
District Information, Relationships & Voting History	(Click to Expand/Hide)

Individual Records

On the right side of the individual record, you will see the icon for **Record Statistics**. If you expand the panel, you will see a snapshot of the member's giving history.

Keep in mind giving history should be reconciled with internal records at the local, state, and National levels.

Record Statistics	
General	
Created On:	8/18/2016
Created By:	
Modified On:	6/10/2022
Modified By:	360 Web-Form
Pledges	
Total:	\$0.00
Outstanding Total Value:	\$0.00
Number of Outstanding:	0
Earliest Outstanding Due-date:	
Earliest Outstanding Amount (By Due-date):	\$0.00
Receipts	
Total:	\$1,311.00
This Quarter:	\$0.00
Current Election Cycle (By Date):	\$1.00
Current Election Period:	\$0.00
Most Recent:	6/12/2022
Earliest:	6/12/2022
Potential Remaining Value:	\$5,000.00
2022 recognition year RPAC total is :	\$1.00
2022 recognition year President's Circle total is :	\$0.00
2022 recognition year NAR total is :	\$0.00
Disbursements	
Total:	\$0.00
This Quarter:	\$0.00
Current Election Cycle (By Date):	\$0.00
Current Election Period:	\$0.00
Most Recent:	
Earliest:	
Activities:	
Completed Activities Performed:	81967
Completed Activities Received:	125
Total Activities:	82092



Custom Reports

Special reports developed specifically for NAR are located under the Reporting tab in the Custom Report List (QRTs) section.

Go to Reporting> Custom Report List (QRTs)

Custom Reports

You can pin your favorite and most frequently used reports to the top of the QRT section. To pin click the “thumbtack” icon and the QRT/Report will move from All Reports to Pinned Reports

System Reports: Custom Reports (QRT's)

 **QRT Reports** are customized reports that are enabled for your dataset. If you need a special report built, please contact the Aristotle Customer Support team for assistance.

QRT List: Available Reports

Pinned Reports

NAR - Import

Click [here](#) to run NAR Import routine

2/27/2008

NAR - Individual Summary Report

Generates a summary of information for a members contributions by year. The figures are not official and have not been confirmed by NAR. Receipts prior to 2009 may need further reconciliation against all local, state, and national levels.

5/27/2011

All Reports

Batch Receipt Update

Move individual receipts by date range from original batch to new batch.

7/31/2019

CA - Batch Report

This report will pull a list of all batches that may need their Deposit Dates updated for Compliance Purposes

1/28/2022

Local Board Performance Report

This report gives you an overview on how a specific Local Association is performing. To determine the level of detail displayed in each report, click the arrow in the Level field. Other than the Individual (Print) level, reports pull into Excel files. Users will also select the **Recognition Year** and **Local Association** from a drop-down menu before clicking Run Report.

Detail: This level displays each contribution (individual and organization)made to the Local Association in the selected recognition year. For example, if John Smith invests \$50 and \$100, both of those transactions will be displayed as separate line items. You may also see contributions from members not in this board. These contributions appear because the member chose for his/her contribution to credit that specific Local Association.

Individual: This level displays an aggregate for each individual who has contributed to the Local Association in the selected recognition year. For example, if John Smith invests \$50 and \$100 to the Local Association, users will see a single line item of \$150. This level also shows outstanding Major Investor pledges, individual contributions to the President’s Circle, and each members’ portion of the contributions sent to NAR (including the divide between hard and soft dollar contributions).

NAR - Local Board Performance

Description: Contribution report based on Local board credit. Summarized by Local, Individual or Detailed listing.

Instructions: For **Report Display** output you must use the "Individual (Print)" Level.
Contributions are included regardless of contributors membership in the board.
NonGiving: Based on Recognition Year; includes only Active members (according to M1); a contribution to any local in the state, not just their **Primary Board** is counted as giving.

Source: All

Level: Local

Received By: National Association of Realtors (1)

Recognition
Year: 2022

Local Association: (0) All

Start Date: 

End Date: 

Exclude Credits: ☐

Exclude In-Kinds: ☐

Batch:

Member ID:

☒ .csv ☐ Report Display

[Run Report](#)

Local Board Performance Report

Local: This level displays the aggregate of the Local Association’s contributions. At most, there are 2-line items on this report; an aggregate of individual contributions and an aggregate of organization contributions. No transaction detail is included in this level. This report also shows the Local Association’s aggregate of outstanding pledges, President’s Circle contributions, and total money sent to NAR (including the divide between hard and soft dollar contributions)

Non-Giving: This level displays contact information for all individuals who have primary membership in a Local Association, but who have not yet invested in RPAC within the specified recognition year. Information included on this report: home/work/mobile phone, email, member type, office ID, office name, office address and email.

NAR - Local Board Performance

Description: Contribution report based on Local board credit. Summarized by Local, Individual or Detailed listing.

Instructions: For **Report Display** output you must use the "Individual (Print)" Level.
Contributions are included regardless of contributors membership in the board.
NonGiving: Based on Recognition Year; includes only Active members (according to M1); a contribution to any local in the state, not just their **Primary Board** is counted as giving.

Source: All

Level: Local

Received By: Batch Totals
Detail

Recognition Year: Individual
Individual (Print)

Local Association: Local
Local Summary
Non-Giving

Start Date:

End Date:

Exclude Credits:☐

Exclude In-Kinds:☐

Batch:

Member ID:

☒ .csv ☐ Report Display

[Run Report](#)

Office Performance Report

The Office Performance Report breaks down the Local Association’s contributions by office. Users will need to select the Level of detail, Recognition Year and Local Board.

Office: This level shows the office name, number of members and participation rate.

Individual: This level shows the name of each member associated with the office and how much they have/have not contributed.

NAR - Office Performance Report

Description: Contribution report broken down by Offices.

Instructions:

Level:

Office

Received By:

Office

Individual

Recognition

Year:

2022

Local Board:

1 National Association of Realtors

Office Id:

Member ID:

Source:

All

[Run Report](#)

State Awards Report

This report lists all the Local Association's primary board members who have invested enough to qualify for a state award. Your State Association can send Aristotle your specific state/local award levels and they can be imported into this report.

Fundraising Tool: If you check the **"Include All Contributions"** checkbox, all contributors will appear on the list allowing you to see which members are close to achieving a state award. This report also displays the member's previous year investment history

- Select the Recognition Year (defaults to the current NAR Recognition Year).
- Select your Local Association.
- Select how you want to sort the report:
 - Board – this is for the State Association, when they are running this report for multiple boards Fundraising Tool Do not use unless instructed to do so by your State Associations
 - Level – this sorts by award level (recommended for Local Associations)
 - Name – this sorts alphabetically.
- If you wish to use the date parameters, note that you will always see the individual's aggregate for the recognition year.
 - **Reached Award By: {Date}** – This displays contributions required to reach the award level must have been received on or before this date.
 - **Assigned Award After: {Date}** -- If entered then then an award must have been assigned (added to the individual's records) and it must have been on or after the date entered
 - **Assigned Award Before: {Date}** -- If entered then an award must have been assigned and must have been before the date specified.

NAR - State Awards

Description: Report on State Specific Award Levels. These are maintained under the Custom Fields panel on the individual page using the Custom Fields Group "State Awards".

Instructions: Check **Only Show New Awards** to limit the report to individuals who have reached an Award level but not had it assigned to their profile.
Check **Add Awards to Individual Records** to add the Award to the *Custom Fields Panel* for any individual on the report that does not already have the award.

Received By: Alabama Association of Realtors (800)

Recognition Year: 2022

Local Association: 1050 BIRMINGHAM AREA ASSOCIATION OF REALTORS® INC

Only Show New Awards: ☐

Reached Award By:

Assigned Award After:

Assigned Award Before:

Add Awards to Individual records: ☐

Sort: Board

Source: Board

Exclude In-Kinds: Name

Include All Contributors: ☒

Active Only: No

[Run Report](#)

Major Investor Recommendations Report

This report provides a list of members that have the contributions necessary to be recommended for a new or increased NAR Major Investor recognition level, based on receipts, previous NAR Major Investor Level and current NAR Investor Donor level.

This report displays information for the entire state, not just for a specified Local Association.

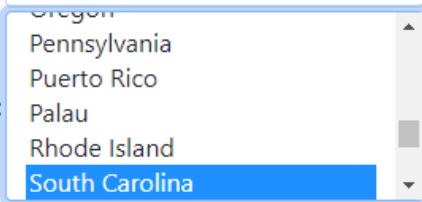
Fundraising Tool: Input an amount in the **Margin** field to determine a qualifying range. For example, entering **300** will report individuals that are \$300 away from obtaining the next investor level.

NAR - Major Investor Recommendations

Description: This report lists individual members that have the contributions necessary to be recommended for a new or increased Major Donor recognition level. It uses the rules set forth by the **RPAC Trustees**.

Instructions: The Year parameter is the Year of the recommendation to check.
The Margin parameter can be used to see who is close to qualifying (e.g. if margin is set to 100 then if someone is \$100 away from getting to golden R they will be recommended for this)

Year: 2022

States: 

Margin: 0

Report: Individual

☒ .csv ☐ Report Display

[Run Report](#)

Major Investor Report

This report creates a list of the NAR Major Investors by State, Level and Years. The NAR Major Investor levels are confirmed and added by NAR RPAC. Investors on this report have already received their Major Investor Award.

This report displays information for the entire state, not just for a specified Local Association. However, you can select a specific local association in the “Local Association” drop-down field.

Only recognized NAR major investors will display on this report.

NAR - Major Investor Report

Description: A current listing of NAR-recognized major investors sorted by Contribution Year, State and Investor Level. Current donor lists reflect investor information and funds received from the state association.

Instructions: Select the Association to report. Use the Ctrl button to multi-select.

Associations:

- Alabama Association of Realtors
- Alaska Association of Realtors
- Arizona Association of Realtors
- Arkansas Association of Realtors
- CA - HAF

Investment Level:

- Golden R
- Sterling R
- Crystal R
- Platinum R

Year:

- Any
- 2023
- 2022
- 2021
- 2020

Local Association:

(0) All

☒ .csv ☐ Report Display

[Run Report](#)

Presidents Circle Report

The report displays a list of NAR President's Circle members and their RPAC investments.

This report displays information for the entire state, not just for a specified Local Association.

NAR - Presidents Circle

Description: Generates various reports related to the President Circle Program. Each of the reports includes Major Investor information and various other fields for the PC Members.

Instructions: Summary – All PC Contributors with their PC total and other information.

Detail – All PC Contributions including date, amount and target.

Lapsed – Members who were PC this year but not this year.

Reminder – Members who have not completed their PC investment in full AND have not contributed since the start date.

Potential – Any member in the 'NAR – Potential Presidents Circle' group for the specified year.

Outstanding – Updates amount owed for email merge fields.

Year: 2022

Start Date:

End Date:

Sort: Member

State: South Carolina

Threshold:

Level: Summary

All Contributors: ☐

[Run Report](#)

Hall of Fame Report

The report displays a list of NAR Hall of Fame members and their RPAC investments.

Users can select a lower threshold to see who is close to attaining Hall of Fame statue. Choose Level = Potential HOF and Threshold below \$25,000 for member close to attaining Hall of Fame.

NAR - Hall of Fame

Description: This report displays current and potential HOF members. The figures on this report are not official and have not been confirmed by NAR. Receipts prior to 2009 may need further reconciliation against all local, state and national level records.

Instructions:

Level:
States:
Threshold:
Recognition Year:
Margin:

[Run Report](#)

Individual Summary Report

This report displays total RPAC investment detail for one member.

The **Summary** level shows an aggregate per year, of a member’s RPAC and President’s Circle investments.

The **Detail** level shows each investment, and which local association received the credit for that contribution.

NAR - Individual Summary Report

Description: Generates a summary of information for a members contributions by year. The figures are not official and have not been confirmed by NAR. Receipts prior to 2009 may need further reconciliation against all local, state, and national levels.

Instructions:

Source: All

Member Id: 502000437

Level: Summary

Association: South Carolina Association of Realtors (880)

[Run Report](#)

Source: All

Member Id: 502000437

Level: Summary

Association: Detail
Summary

[Run Report](#)

RPAC Grant Report

This report provides RPAC data needed when completing a Major Investor or Fundraising Grant Application.

You can choose the entire state association or local association by selecting the appropriate level. The report provides three years of RPAC history (current and previous two years) including; membership counts, total RPAC \$ raise, participation %, fundraising actual vs goal, and hard and soft dollars.

NAR - RPAC Grant Report

Description: This report provides RPAC data needed when completing a Major Investor or Fundraising Grant Application.

Instructions: Level: Use the drop-down to select if you want to run the report for the State Association or Local Association.

State Association: Use the drop-down to select your State Association.

Local Association: Use the drop-down to select a Local Association, or if you want to see information on the whole state, select "No Board Assigned".

Level:

State Association:

Recognition Year:

Local Association:

0000 0 No Board Assigned

1 National Association of Realtors

1000 ANCHORAGE BOARD OF REALTORS® INC

1005 GREATER FAIRBANKS BOARD OF REALTORS®

1010 KACHEMAK BOARD OF REALTORS® INC

[Run Report](#)

NAR - RPAC Grant Report

Description: This report provides RPAC data needed when completing a Major Investor or Fundraising Grant Application.

Instructions: Level: Use the drop-down to select if you want to run the report for the State Association or Local Association.

State Association: Use the drop-down to select your State Association.

Local Association: Use the drop-down to select a Local Association, or if you want to see information on the whole state, select "No Board Assigned".

Level:

State Association:

Recognition Year:

Local Association:

0000 0 No Board Assigned

1 National Association of Realtors

1000 ANCHORAGE BOARD OF REALTORS® INC

1005 GREATER FAIRBANKS BOARD OF REALTORS®

1010 KACHEMAK BOARD OF REALTORS® INC

[Run Report](#)

NAR RPAC Investment History Report

This report generates 10 years of RPAC history based on current recognition year. Lifetime RPAC and PC totals are included.

You can choose the entire state association or local association by selecting the appropriate level.

State Level – Select Level = State only and Run Report

Local Level – Select Level = Local and Choose the appropriate state and local association in the designated dropdown selectors.

NAR RPAC Investment History Report

Description: Report generates 10 years of RPAC investment history based on current recognition. Lifetime RPAC and PC totals are included. Figures have not been confirmed by NAR and may need further reconciliation against all local, state, and national levels.

Instructions:

Source: All

Level: State Association

State Association: Alaska Association of Realtors (802)

Local Association: 1000 ANCHORAGE BOARD OF REALTORS® INC

Exclude Credits: ☐

Exclude In-Kinds: ☐

[Run Report](#)

NAR RPAC Investment History Report

Description: Report generates 10 years of RPAC investment history based on current recognition. Lifetime RPAC and PC totals are included. Figures have not been confirmed by NAR and may need further reconciliation against all local, state, and national levels.

Instructions:

Source: All

Level: Local Association

State Association: Alaska Association of Realtors (802)

Local Association: 1000 ANCHORAGE BOARD OF REALTORS® INC

Exclude Credits: ☐

Exclude In-Kinds: ☐

[Run Report](#)

Event Summary Report

This report displays information about an event setup in Aristotle 360. Select you event and run report to display the following information:

- Total Attendees
- Total \$ raised for any receipts credited to the event for RPAC
- Total pledge dollars associated with the event
- Detailed information on attendees assigned to event.

This report provides necessary information for NAR Grant Reimbursement applications.

NAR - Event Summary Report

Description: Select a specific event and click "run report"

Instructions: This QRT generates a detailed list of RPAC investments, pledges, and member information associated with an event

Event
Name:

[Run Report](#)