

MAJOR INVESTOR EVENT REIMBURSEMENT: ADDING ATTENDEES TO EVENT

Major Investor Event Reimbursement: Adding Attendees to Event

Part of the NAR Major Investor Event Grant Reimbursement process requires state or local staff to add those members who attended to an event in the PAC Management System (Aristotle 360). This guide provides you with instructions for importing your list of attendees and adding them to your event. This is a two-step process and requires association staff to do the following:

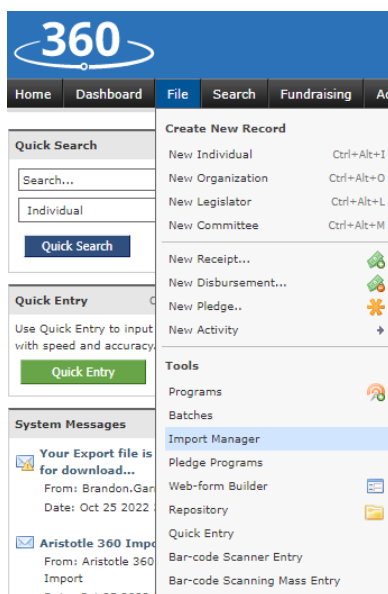
1. Import a list (see section Importing Lists in Aristotle 360)
2. Upload the attendees to the event in Aristotle 360 (see section Upload Attendees to event)

Importing Lists into Aristotle 360

Each file must be formatted as follows:

- .csv or .xls(Excel 97-2003)
- One column contains 9-digit Member ID, or contains name (for all lists regardless of phone bank)

1. Go to File – Import Manager.



2. Click Start New Import

Import Manager

 The **Import Manager** allows you to select from your recent record imports and re-import new data.

START NEW IMPORT (WITH NEW SETTINGS):

Start New Import

- Click the Browse button to select your source file. Leave import type as Individual, type in the Import Title, and select the Federated Group (this is your Local Association 4-digit ID. E.g. AK – (1005). If you are with a State Association, select the State Association 3-digit ID. Eg. AK:802) Then check the box “first row contains column headings.” There can be no spaces above the first row of headings.

Aristotle 360 Import Wizard

This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 1: SELECT YOUR DATA FILE...

Select the source file that contains the data you wish to bring in and describe the file and data types.

- View our **Sample Preformatted Files** for examples on how to setup your import file(s). The maximum supported file size for a single import file is 50MB.

Source File: 2022 State Contacts .csv
(Max File Size: 50MB)

Import Type: Individual

Import Title: 2022 State Contacts

Federated Group: MT - (5450)
MT - (5455)
MT - (5460)
MT:850
National

☒ First row contains column headings. (Not valid for .DBF files)

- Click **NEXT**
- You will now be taken to the Confirm Your File step. This shows you a preview of your import group. Click **NEXT**.

STEP 2: CONFIRM YOUR FILE...

Confirm that your source data is properly formatted, is being accurately interpreted by the import wizard, and that the number of records is accurate.

Import Name: 2022 State Contacts

Source File: 2022 State Contacts .csv

Source File Type: CSV

Destination Data Type: Individual

Number of Records: 80

FILE PREVIEW:

MemberID	Column1
10151116	
198036372	
80697568	
80860112	
81052050	

FILE OPTIONS:

Start at Line: 1 of 80

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6. Now you must map your data.

- Select the row with the Member ID number (in the Source Preview Column), and under the Field Data Type menu, select Basic Info.
- This will prompt a window in the destination field, select Source ID from the menu.

STEP 3: MAP YOUR DATAPOINTS...

Map each of the fields from your source data file to a corresponding field in the database. You may choose not to import selected fields.

Import Name: 2022 State Contacts

Source File: 2022 State Contacts .csv

Destination Data Type: Individual

DATA MAPPING:

Source Column	Source Preview Line 1	Field Data Type	Destination Field	Default Email
(1) MemberID	10151116	Basic Info	Source ID	
(2) Column1		-- Do not Import --		

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- Type in the name of your list under the header **Step 4B: Assign to List and click Add New List. (This is not optional for lists)** When you get the confirmation "List Has Been Added" click Next.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

[Add New Category](#) [Add New Group](#)

☐ Add All Imported to Below Selected Groups

☐ Import Groups From Source

STEP 4B: ASSIGN TO LIST

Assign the records from your source data file to a New List. This step is optional.

[Add New List](#)

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8. Following criteria in the Record Matching page:

STEP 5: RECORD MATCHING...

Select options for importing new and updating the existing records. Also make sure to select how the import procedure should match that data.

ADDING NEW

- ☐ Create Non-Existing Individuals
- ☒ Ignore Non-Existing Individuals

ADDRESS VALIDATION

- ☒ Validate address with latest district information.

SOURCE ID

- ☒ Add Padding to Beginning of Source ID
- Character to be appended to Beginning of Source ID
-
- Enter the number of characters that make up your entire source ID
-

UPDATING EXISTING

- ☒ Update Individual Info
- ☐ Do Not Update Individual Info

MATCHING CRITERIA

- ☐ First Name, Last Name, Source ID
- ☐ First Name, Last Name, Address Line 1
- ☐ First Name, Last Name
- ☒ Source ID
- ☐ Voter ID
- ☐ First Name, Last Name, Address Line 1, Zip5
- ☐ First Name, Last Name, Zip5
- ☐ Personal Email

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9. Enter your email into the Email Notification field. Click FINISH, you do not need to save settings.

FINAL STEP...

Clicking the Finish button will start the import procedure. Please make sure to save your settings if you will reuse the same data structure later on. Also make sure to type in your email address, so we can send you a detailed report about your import.

SAVE SETTINGS:

Save As (Name): [Save Settings](#)

Description

EMAIL NOTIFICATION:

Send Email to:

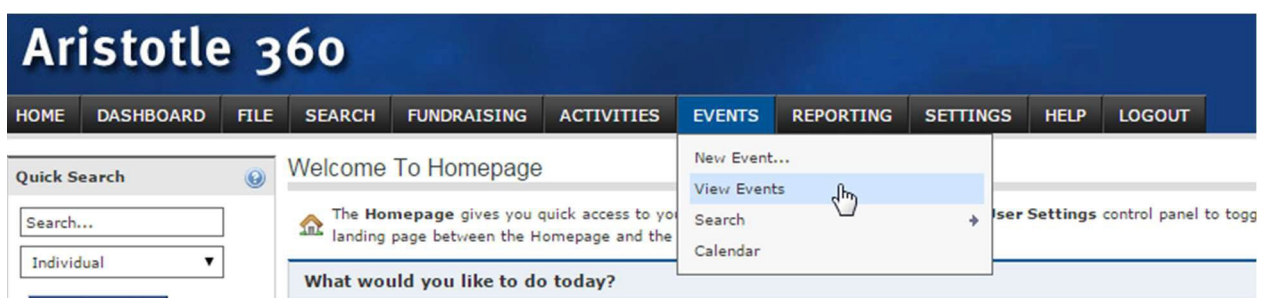
[Previous](#)

[Finish](#)

[Cancel](#)

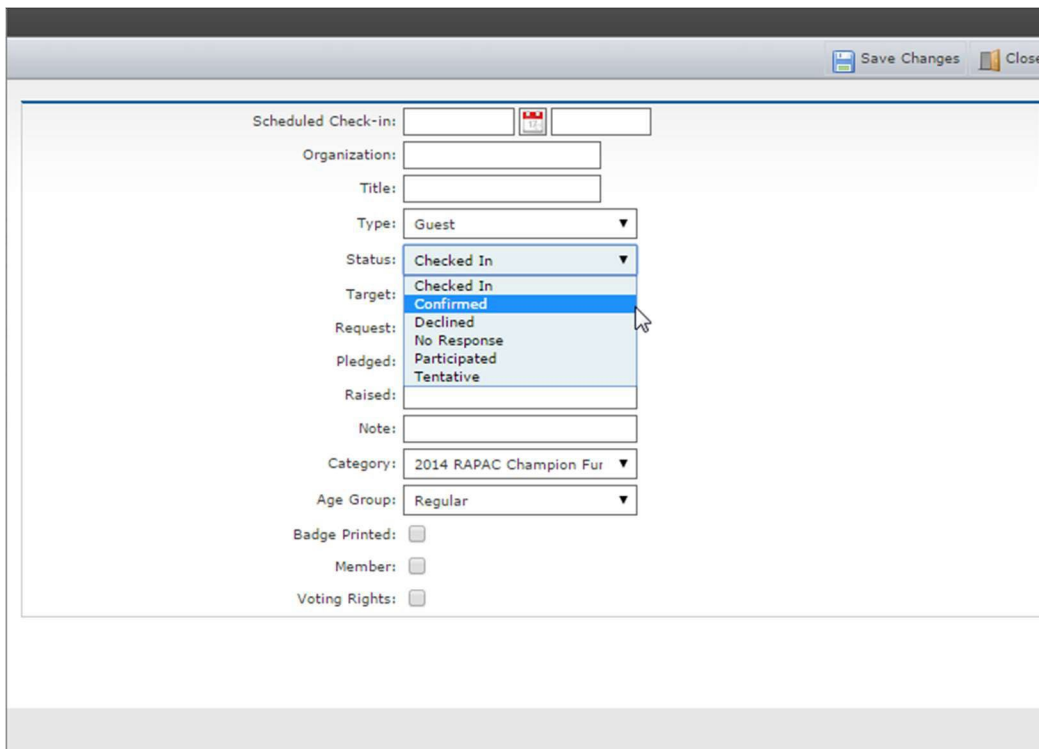
Upload List of Attendees to Event

1. Determine if you are going to add one attendee at a time or if you are going to add a list of attendees. If you are going to add a list of attendees, you will need to import the list first. Please see instructions for Supplemental Material – Creating Lists (at the end of this document) to import your list of attendees then follow the instructions below.
2. Locate your event by going to Events>View Events.



3. Select your event.
4. To add attendees, expand the attendees panel and click Add Attendee/Participant. If you want to add multiple attendees, click the selection for Add List. If you want to add just one attendee, skip to Step 7.

6. Change the field for Participation Status to “Confirmed” and click Save Changes.

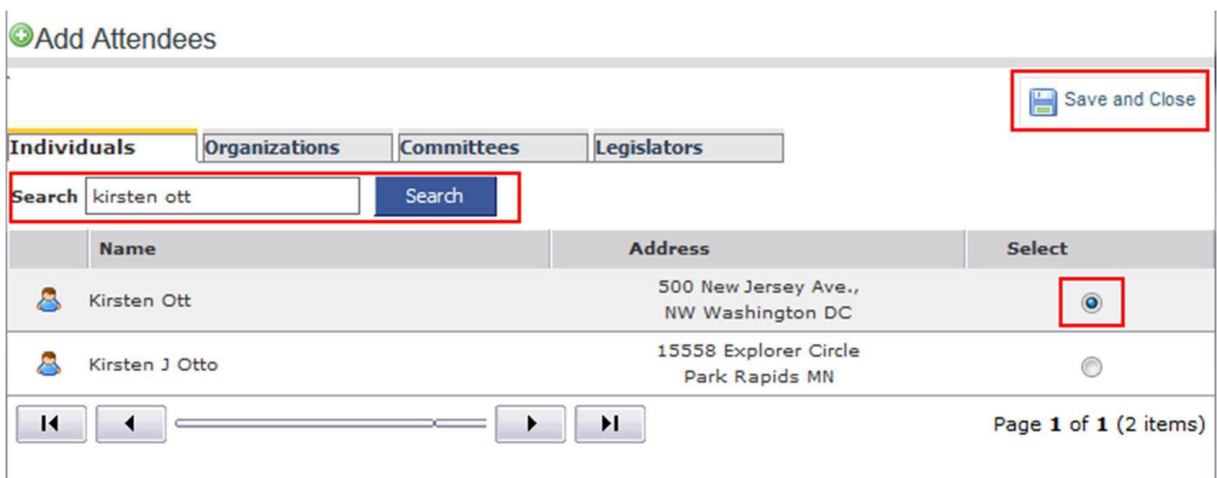


The screenshot shows a registration form with the following fields and options:

- Scheduled Check-in: [text input]
- Organization: [text input]
- Title: [text input]
- Type: Guest [dropdown]
- Status: Checked In [dropdown menu open]
- Target: Checked In [dropdown]
- Request: Declined [dropdown]
- Pledged: No Response [dropdown]
- Raised: Participated [dropdown]
- Note: [text input]
- Category: 2014 RAPAC Champion Fur [dropdown]
- Age Group: Regular [dropdown]
- Badge Printed: ☐
- Member: ☐
- Voting Rights: ☐

The dropdown menu for Status is open, showing the following options: Checked In, Confirmed, Declined, No Response, Participated, and Tentative. The 'Confirmed' option is highlighted.

7. If you want to add one attendee to an event, expand the attendees panel and Add One.
8. In the pop-up window, type the name of the person you want to add in the Search field and click Search. Select the name of the person you want to add. Click Save and Close.



The screenshot shows the 'Add Attendees' pop-up window with the following elements:

- Buttons: Save and Close
- Tabs: Individuals, Organizations, Committees, Legislators
- Search field: kirsten ott
- Search button
- Table with columns: Name, Address, Select
- Table rows:
 - Kirsten Ott, 500 New Jersey Ave., NW Washington DC, [radio button selected]
 - Kirsten J Otto, 15558 Explorer Circle, Park Rapids MN, [radio button unselected]
- Page 1 of 1 (2 items)