

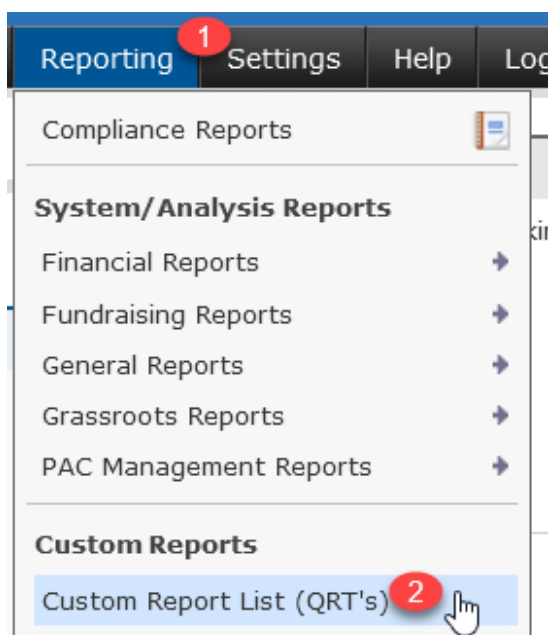
MAJOR INVESTOR BATCH PROCESS

Major Investor Batch Process

This tool helps to ensure the correct amount is sent to NAR for recognition of Major Investors. This is especially helpful for the states that do early/accelerated recognition.

The Major Investor Batch Process will identify members from the batch who have been a Major Investor the previous year, have pledged to be a Major Investor for the current year, or have contributed a Major Investor amount.

After entering your batch, before using the Vetting and Transfer Tool, run the NAR Major Investor Batch Process. Go to Reporting > Custom Reports List (QRTs) > NAR – Major Investor Batch Process



Select the **NAR – Major Investor Batch Process** Option under All Reports. **Tip:** Click the green push pin to the right of the report title to pin this report to the top of the list so it will be easier to find next time.

NAR - Major Investor Batch Process



This process will create a new batch of receipts from members who are in the Major Investor Program.

Start by selecting the batch name that you are working with. Then select the recognition year that you are working with. Next, choose the Level. Start with the Report Level for a preview. Then, to move the receipts to a new MI batch, run the report on the Process Level.

NAR - Major Investor Batch Process

Description: This process will create a new batch of receipts from members who are in the Major Investor Program.

Instructions: Select the Report option first to see a report of RPAC and NAR totals for current and/or potential Major Investors within the batch. If you would like the receipts on that report moved into a new batch, run it again selecting the Process mode. Process mode will move the receipts out of the existing batch and put them in a new batch, with "_MI" appended to the original batch name.

Batch Name:

Recognition Year:

Level:

[Run Report](#)

NAR - Major Investor Batch Process

Description: This process will create a new batch of receipts from members who are in the Major Investor Program.

Instructions: Select the Report option first to see a report of RPAC and NAR totals for current and/or potential Major Investors within the batch. If you would like the receipts on that report moved into a new batch, run it again selecting the Process mode. Process mode will move the receipts out of the existing batch and put them in a new batch, with "_MI" appended to the original batch name.

Batch Name:

Recognition Year:

Level:

[Run Report](#)

Click [here](#) to download your CSV file.

When you view the report after running Report Level, you will see all of the same information as Process Level, with exception of the New Batch Name column. The New Batch Name column will only appear for the Process Level report and will be found in column H.

See below for an explanation of what each column means.

	A	B	C	D	E	F	G	H
1	Member ID	First Name	Last Name	Recognition Year	Receipt Date	Receipt Amount	Original Batch Name	New Batch Name
2	555019902	Trisha	Smith	2022	10/24/2022	142.86	39OR102422RPAC	39OR102422RPAC_MI
3	555013051	Lindsey	Jones	2022	10/28/2022	496.18	39OR102422RPAC	39OR102422RPAC_MI

I	J	K	L	M	N	O	P	Q
rcp_Total	Pledged A	Pledge St	Outstandi	NAR Amount	NAR Holding	Current Years Status	Last Years Status	PC Status
907.14	1000	Open	142.86	300	0	Sterling R""		No
1050	1000	Complete	0	300	0	Sterling R""	Sterling R""	No

A) Member ID

B) First Name

C) Last Name

D) This is the recognition year of the receipt

E) Date of the receipt

F) Amount of the receipt

G) Original batch name

H) The name of the batch the receipts have been moved to (Only on the Process Level)

I) Year to date total of receipts for the member

J) If the member has a pledge, it will appear here

K) Status of the pledge if a pledge exists

L) The amount remaining on the pledge if a pledge exists

M) This is the amount that NAR has received for the member

N) This is the amount that is scheduled to be sent to NAR or is currently in transit to NAR

O) If the member is a current NAR recognized Major Investor, this column will show the level

P) If the member was a Major Investor the year prior, this column will show the level

Q) This column will indicate if the member is a President's Circle member

When analyzing this report, it is important to pay close attention to columns F, I, M, N and then review columns J, O, P, Q when determining the appropriate amount to send to NAR.

	A	B	C	D	E	F	G	H
1	Member ID	First Name	Last Name	Recognition Year	Receipt Date	Receipt Amount	Original Batch Name	New Batch Name
2	555019902	Trisha	Smith	2022	10/24/2022	142.86	39OR102422RPAC	39OR102422RPAC_MI
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rcp_Total	Pledged A	Pledge Sta	Outstandi	NAR Amount	NAR Holding	Current Years Status	Last Years Status	PC Status
907.14	1000	Open	142.86	300	0	Sterling R""		No
1050	1000	Complete	0	300	0	Sterling R""	Sterling R""	No

Tip: If you have a large list, it is helpful to insert a column to note the amount that you want to send to NAR for each of the receipts.

After you have completed your review of the MI Batch Process report, you can go back to the original batch, or the new batch if you ran the Process Level, and VTT with the appropriate split amounts for NAR.