

ARISTOTLE
Now You Know™

Aristotle 360

PAC Management System User Guide for REALTOR® Associations

Revised September 2026

Federated Access

Every user is governed by federated access, which determines the information accessible and the actions permitted based on the user's assigned association(s) and/or job function.

Federated Access

- Directs the level of access that a user has, such as:
 - Report access
 - Data entry access
- Limits the user's visibility to members and reporting data of the association being managed
 - Allows local association staff to view members within their local association
 - Allows state association staff to view members across all local associations within their state
- Ensures reports return only data applicable to the assigned association

What is a record?

In Aristotle 360, there are four types of Records: **Individuals**, **Legislators**, **Organizations**, and **Committees**. Association staff members will primarily be reviewing their member information through Individual records.



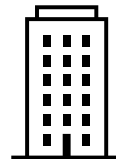
Individual Records

This record type contains information about specific people.
Examples: REALTOR® members, affiliates, and association staff.



Legislator Records

This record type contains information about elected officials.
Examples: U.S. Senators and Representatives, Governors, members of State Legislatures, County Commissioners, and some local elected officials.



Organization Records

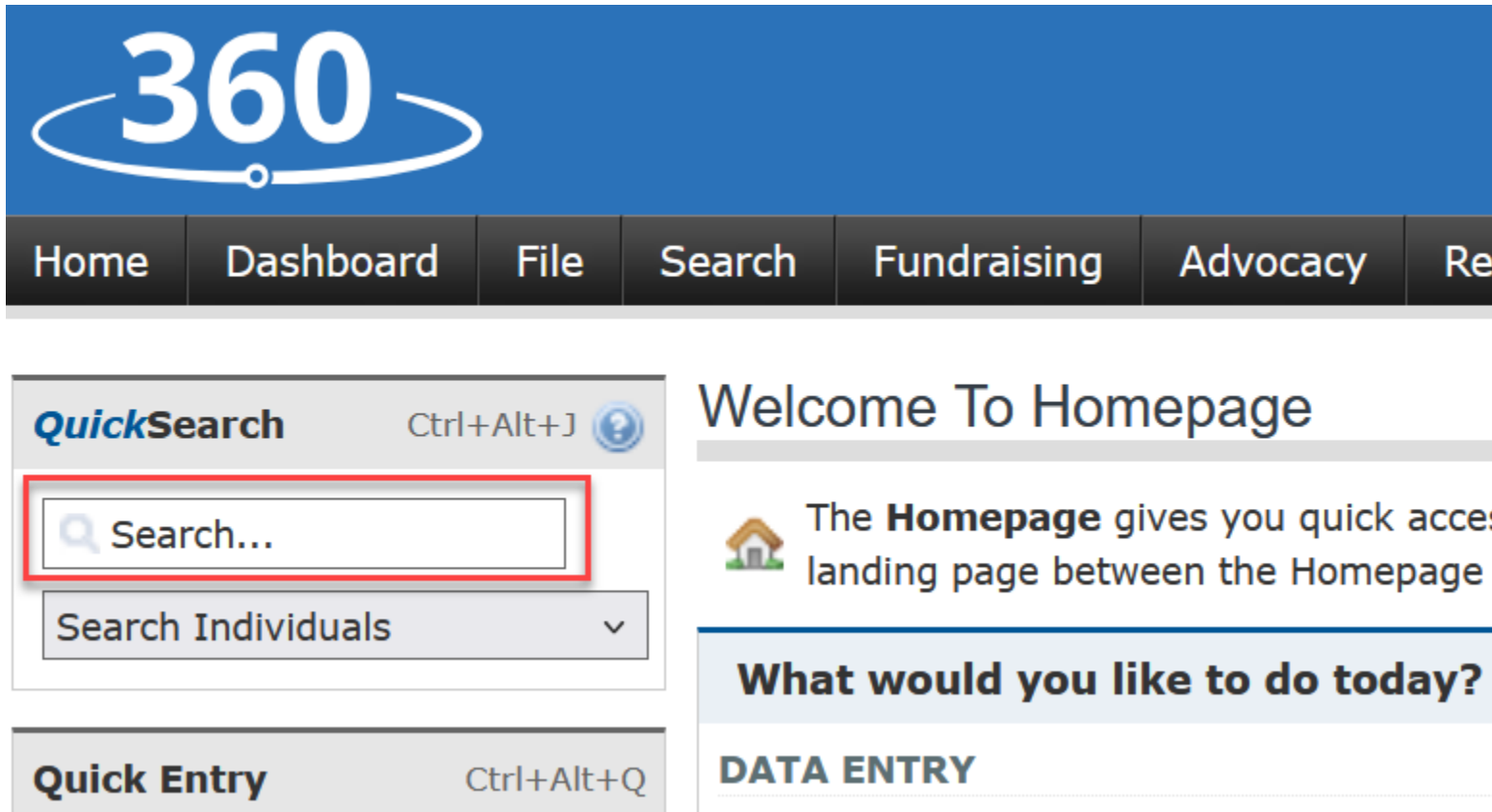
This record type contains information about organizations of various types.
Examples: offices, vendors, REALTOR® associations – state and local, employers, and banks.



Committee Records

This record type includes the 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.

Searching Records



Member records are automatically synced from M1 to Aristotle 360.

To search for a record, type a Member ID (M1 Number) or name into the search field of the **QuickSearch** panel located in the upper left-hand corner of your Aristotle 360 home screen.

Results will populate as you type. Click on the search result for the record you would like to open.

Note: The dropdown box below the search field defaults to Individuals, but you can also search for Legislators, Organizations, and Committees.

Viewing Individual Records

Each record contains basic information, address information, contact information, and a series of expandable panels that provide additional information about the member.

Individual **Logan Hamilton**

Basic Information

Prefix: **Mr.**

First Name: **Logan**

Middle:

Last Name: **Hamilton**

Suffix:

Mail Name: **Logan Hamilton**

Voter ID: **2000.00**

Salutation 1: **Logan**

Source ID: **000000013**

Employer: **Aristotle Internatic**

Occupation: **Aristotle**

Federated Access Groups

- CA:808 - California Association of Realtors x
- CA - (1965) - SAN DIEGO ASSOCIATION OF REALTORS® x

Select Photo

Upload Photo...

Remove Photo

ADDRESS INFORMATION

Type	Line 1	Line 2	City	State	Zip
Home	123 Main Street		San Diego	CA	92109
Mail	(Click here to enter new Mail address)				
Vacation	(Click here to enter new Vacation address)				
Work	(Click here to enter new Work address)				

CONTACT INFORMATION

Preferred Contact Method: **Electronic**

Preferred Electronic Contact: **Personal Email**

Preferred Phone: **Mobile Phone**

Electronic Contact Frequency: **Anytime**

Additional Details

Custom Fields

Activities

Receipts

Pledges

Disbursements

Notes

Events

Groups

District Information, Relationships & Voting History

5

Custom Fields

In the **Custom Fields** panel, the two most common sections you will see are:

- **NAR Import** – Expand this section to view the member's type, status, and association information.
- **Major Donors** – This section contains information related to the **Major Investor** program. Expand it to view the member's Major Investor level and recognition details, including lapel pin status, and related comments. If the member is a **Hall of Fame** or **President's Circle** member, a checkmark will appear next to the applicable program. Only NAR staff can edit this section.

Custom Fields	
Custom Group Name	
	California 808
	FPC Program
	Fundraising Metrics
	NAR Import - 1480
	Major Donors - 2023
	Major Donors - 2024
	Major Donors - 2025
	Major Donors - 2026

NAR Import - 1480	
Association Name	TUCSON ASSOCIATION OF RE
Member Status	A
Primary State Association Id	804
Association Id	1480
Member Type	S
Office Id	

Major Donors - 2026	
Pin Count	
Contributor Year	2026
Donor Type	Individual
State Abbreviation	CA
Contributor Type	Sterling "R"
Years as Major Donor	4
Pin Status	Sent
Pin Sent Date	03/01/2026
Plaque Status	
Plaque Sent Date	
Pin Preference	
Comments	
Hall of Fame	☒
PC Member	☒
HOF Level	\$25,000
Major Donor Association	
Major Donor Association ID	

Activities, Groups, and Pledges Panels

Activities (Click to Expand\Hide)						
☐ Open ☒ Closed ☒ Exclude Action Alert Filter By Activity Type: All						
	Subject	Sender	Receiver	Status	Due	Completed
	REALTOR® Party News Specia	McCrory, Katelin	Hamilton, Logan	Sent		7/23/2026
	Reminder: Finish Your Preside	Roth, Daniel	Hamilton, Logan	Bounce (Ha...		7/17/2026
	President's Circle Round Four	Roth, Daniel	Hamilton, Logan	Sent		6/24/2026

The **Activities** panel shows communications sent to the member.

Groups (Click to Expand\Hide)				
View	Group	Category	Added On	Remove
	AZ 804 Key Contact App Users	Arena Users	8/5/2026	
	NAR - Sterling R: 47607	NAR - Global Groups	5/21/2026	
	NAR - President's Circle: 47605	NAR - Global Groups	5/21/2026	
	NAR - Hall of Fame: 47606	NAR - Global Groups	5/21/2026	

The **Groups** panel shows tracking groups to which the member belongs.

Pledges (Click to Expand\Hide)							
	Amount	Due Date	Date Created On	Outstanding Amount	Status	Pledge Type	Delete
	\$ 1000.00	08/10/2023	08/10/2023	\$0.00	Completed	General	
	\$ 1000.00	12/31/2024	02/23/2024	\$0.00	Completed	General	
	\$ 730.00	08/26/2025	08/26/2025	\$0.00	Completed	General	
	\$ 730.00	12/01/2026	04/07/2026	\$460.00	Open	General	

The **Pledges** panel shows the member's Major Investor pledges.

Receipts and Record Statistics Panels

The **Receipts** panel shows all receipts and splits, including vetted contributions between the state and NAR. This section is intended for state staff data entry and compliance use.

Receipts (Click to Expand\Hide)					
Search					
	Date	Amount	Type	Subtype	Period
	01/30/2026	\$7.50	Contribution	Check	Other(2025)
	11/12/2025	\$325.00	Contribution	Credit Card	Other(2025)
	10/24/2025	\$-7.50	Internal Receipt	Offset	Other(2025)
	10/15/2025	\$350.00	Contribution	Credit Card	Other(2025)

Note: The receipts section should not be used for determining member investments. To view a member's giving history, go to **Reporting > Custom Report List (QRTs)** and run the **NAR – Individual Summary Report**.

The **Record Statistics** panel is found on the right side of the page.

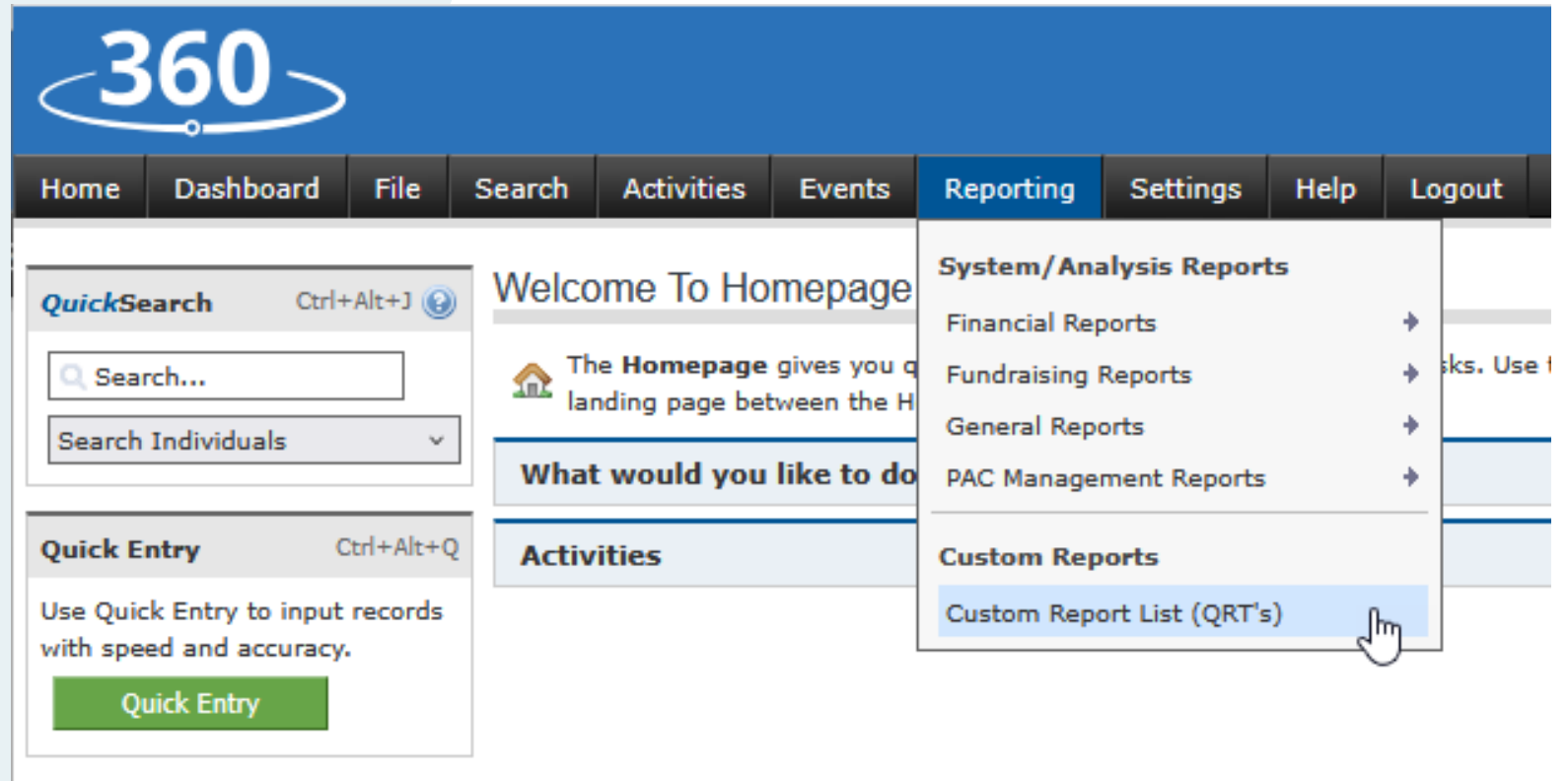
Record Statistics	
 Receipts	
Total:	\$3,425.00
This Quarter:	\$0.00
Current Election Cycle (By Date):	\$7.50
Current Election Period:	\$0.00
Most Recent:	1/30/2026
Earliest:	10/5/2006
Potential Remaining Value:	\$5,000.00
2026 recognition year RPAC total is :	\$375.00
2026 recognition year President's Circle total is :	\$0.00
2026 recognition year NAR total is	\$7.50

Expand this panel to view current recognition year RPAC totals.

Custom Reports

Dedicated reports have been developed specifically for NAR, State, and Local Associations. These reports are available under the Reporting tab in Aristotle 360.

To view the available reports, go to **Reporting > Custom Report List (QRT's)**.



Pinning Reports

Frequently used reports can be pinned to the top of the custom reports list.

Click the green thumbtack icon to the right of the report name to pin the report. This will move the report to the Pinned Reports section.

Click on the red circle to unpin a report and return it to the All Reports section.

Tip: Reports most frequently used by associations are displayed with green font for easy identification.

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

 Type Keyword for Filter

Pinned Reports

NAR - Group Performance

Contribution information on members of a group.

2/27/2008

NAR - Local Board Performance

RPAC investment report based on Local Association credit. This report can be run by Local aggregate, Individual aggregate, Detail or Non-Giving levels.

11/4/2009

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

The **Local Board Performance** report shows how a specific association is performing and reflects investments credited to the association, regardless of member status. This report offers various levels which are selected by clicking into the Level box and choosing the desired report from the drop-down.

The two most commonly used levels are:

- **Detail** – Displays every investment, including individual and organization investments, credited to the association for the selected recognition year.
- **Individual** – Displays the aggregate investment total for each individual who made an investment to the association for the selected recognition year.
Organization receipts are not included at the Individual level and are only available at the Detail level.

Note: Since this report provides receipt/investment information for the selected recognition year, **do not enter start date or end date**. After selecting the report level and recognition year, simply run the report.

NAR - Local Board Performance

Description: RPAC investment report based on Local Association credit. This report can be run by Local aggregate, Individual aggregate, Detail or Non-Giving levels.

Instructions: RPAC investments are included regardless of the member's primary association. This report displays the association that is currently receiving credit for the investment.

The "Non-Giving" level is determined by recognition year and only includes members who are active and solicitable, according to M1.

For a PDF version, please select the "Individual (Print)" Level and the "Report Display" button prior to running the report.

Source: Voluntary

Level: Detail

Received By: National Association of Realtors (1)

Recognition Year: 2026

Local Association: (0) All

Start Date:

End Date:

Exclude Credits: ☐

Exclude In-Kinds: ☐

Batch:

Member ID:

☒ .csv ☐ Report Display

[Run Report](#)

Local Board Performance

Two additional levels of the **Local Board Performance** report that are commonly used are:

- **Local** – Displays the aggregate investment totals for the association for the selected recognition year. Individual and Organization investment totals are displayed on separate lines. For receipt level detail, reference the **Individual** or **Detail** levels.
- **Non-Giving** – Displays the contact information for all individuals with primary membership at the association who have not yet made an investment for the selected recognition year.

Note: Since this report provides receipt/investment information for the selected recognition year, **do not enter start date or end date**. After selecting the report level and recognition year, simply run the report.

NAR - Local Board Performance

Description: RPAC investment report based on Local Association credit. This report can be run by Local aggregate, Individual aggregate, Detail or Non-Giving levels.

Instructions: RPAC investments are included regardless of the member's primary association. This report displays the association that is currently receiving credit for the investment.

The "Non-Giving" level is determined by recognition year and only includes members who are active and solicitable, according to M1.

For a PDF version, please select the "Individual (Print)" Level and the "Report Display" button prior to running the report.

Source: All

Level: Local

Received By: National Association of Realtors (1)

Recognition Year: 2026

Local Association: (0) All

Start Date:

End Date:

Exclude Credits: ☐

Exclude In-Kinds: ☐

Batch:

Member ID:

☒ .csv ☐ Report Display

[Run Report](#)

Individual Summary Report

The **Individual Summary Report** provides a complete view of a member's investment activity.

There are two levels to this report:

- **Detail** – Displays each RPAC investment and President's Circle contribution by date, along with which local association received the credit for the contribution.
- **Summary** – Provides aggregate totals by recognition year, broken out by RPAC investments, President's Circle contributions, and Pro-Property Platform contributions.

NAR - Individual Summary Report

Description: This report shows a member's RPAC investment total or detail by recognition year. For people approaching HOF status, please confirm totals with NAR staff. Receipts prior to 2010 may require reconciliation.

Instructions:

Member Id:

Level:

Detail

Summary

[Run Report](#)

Office Performance Report

NAR - Office Performance Report

Description: Contribution report broken down by Offices.

Instructions:

Level: Office

Received By: National Association of Realtors (1)

**Recognition
Year:** 2026

Local Board: 1 National Association of Realtors

Office Id:

Member ID:

Source: Voluntary

[Run Report](#)

The **Office Performance Report** shows contributions to the association by office for the specified recognition year.

Report Levels:

- **Office** – Displays each office, including the office name, number of members, and the participation rate.
- **Individual** – Displays each member associated with the office and the amount, if any, they have invested.

To select a report Level or change the Recognition Year, click the corresponding box and choose from the drop-down.

Major Investor Recommendations

The **Major Investor Recommendations** report:

- Identifies members who are on track to becoming Major Investors based on criteria like receipts, pledges, and previous major investor status.
- List members for the entire state
 - Local associations can filter the report to view only their members
- A margin is not required to run the report.

NAR runs this report on a weekly basis to confirm Major Investors.

Fundraising Tip: Use the **Margin** field to identify members who are close to reaching the next investor level. For example, entering 300 will show individuals who are \$300 or less away from qualifying for the next level.

NAR - Major Investor Recommendations

Description: This report displays members who have the investments necessary to be recommended for a new or increased Major Investor level. The report utilizes the rules set forth by the RPAC Trustees.

Instructions: The "Year" field represents the recognition year.

The "Margin" field can be used to see who is close to qualifying for a Major Investor level. For example, if the margin is set to \$100, then the report will display members who are within \$100 from achieving their first or next Major Investor level.

Year: 2026

States:

Alaska

Alabama

APO

Arkansas

American Samoa

Margin: 0

Report: Individual

☒ .csv ☐ Report Display

[Run Report](#)

Major Investor Report

The **Major Investor Report** provides a list of *confirmed* NAR Major Investors, including their Investment Level and Recognition Year.

Users can generate the report for the state as a whole or for individual local associations based on the user's federated access.

The **Investment Level** and **Year** fields support multiple selections, allowing users to view multiple investment levels and recognition years within a single report.

NAR - Major Investor Report

Description: A current list of NAR confirmed Major Investors, sorted by recognition year, state and investor level.

Instructions: Select your Association and desired parameters. Use the Ctrl button to multi-select.

Associations:

Investment Level:

Year:

Local Association:

☒ .csv ☐ Report Display [Run Report](#)

President's Circle Report

NAR - President's Circle

Description: Generates various reports related to the President's 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 President's Circle' group for the specified year.

Outstanding – Updates amount owed for email merge fields.

Year: 2026

Start Date:

End Date:

Sort: State

State: California

Threshold:

Level: Summary

All Contributors: ☐

Create List: ☐

The **President's Circle Report** displays a list of President's Circle members and their RPAC investments.

The report displays President's Circle member information for the entire state and can be filtered by local association.

The instructions outline what information is provided for each report Level. The **Summary** Level is most utilized.

Note: Start Date and End Date are not necessary as the report will pull based on the full year indicated in the Year field.

Hall of Fame Report

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: NAR Confirmed

States:

Alaska

Alabama

APO

Arkansas

American Samoa

Threshold: NAR \$25,000

Recognition Year: 2026

Margin: 0

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

This report includes two levels:

- **NAR Confirmed** – Displays members who have been confirmed as NAR Hall of Fame members.
- **Potential HOF** – Displays members who are close to attaining Hall of Fame status. NAR will review and reconcile investment totals prior to confirming a new HOF member.

When Potential HOF Level is selected, users can enter a threshold below \$25,000 to identify members who are approaching Hall of Fame status.

Tip: Users can enter a Margin to identify members whose overall investments are within the specified amount of reaching the selected Threshold.

RPAC National Awards Tracking Report

The **RPAC National Awards Tracking Report** provides a comprehensive view of RPAC performance for states and local associations, including:

- RPAC investment totals
- Participation rates
- Major Investors
- President's Circle
- NAR Goals

There are two levels for this report:

- **State** – displayed alphabetically by region
- **Local** – displayed alphabetically by state

Use this report to measure association progress toward NAR goals and track key RPAC metrics.

Note: The report populates based on the full Recognition Year selected. Leave the Start and End dates blank.

NAR - RPAC National Awards Tracking Report

Description: Generate a state or local level report that displays RPAC fundraising information, including state or local RPAC totals, participation percentage, number of investors, etc.

Instructions: Select your desired recognition year and choose between State or Local level of the report. No need to put in a date range, unless specifically desired.

Recognition Year:

Start:

End:

Level:

State

Local

[Run Report](#)

RPAC Investment History 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: Voluntary

Level: Local Association

State Association: Alabama Association of Realtors (800)

Local Association: 1000 ANCHORAGE BOARD OF REALTORS® INC

Exclude Credits: ☐

Exclude In-Kinds: ☐

The **RPAC Investment History Report** generates 10 years of RPAC investment history for members beginning with the current recognition year.

The report has two levels:

- **Local Association**
- **State Association**

Users can filter the report by member type such as REALTOR®, Affiliate, or Staff, as well as Active or Inactive status to focus on specific member groups.

Note: The investment history columns are labeled based on the current recognition year:

- **Current Rec Year Totals** is that recognition year
- **+1** is the next recognition year
- **-1** is the previous recognition year
- **-2** is two recognition years prior
- **-3** and so on

Pledge Report

The **Pledge Report** displays members with pledges associated with the selected state in the Association field and the Pledge Year.

The report can be run by four **Pledge Status** types:

- **All**
- **Canceled**
- **Completed**
- **Open**

Note: A pledge is marked as Completed once the full dollar value of the pledge has been fulfilled through RPAC receipts. Receipts are linked automatically to the pledge based on receipt recognition year.

NAR - Pledge Report

Description: This report displays a list of current recognition year pledges and whether the pledge is open or has been completed.

Instructions: This report uses both the recognition year and the pledge due date. When creating pledges in individual records in AI360, we recommend using the NAR deadline for the current recognition year.

Association: Arizona Association of Realtors (804)

Pledge Year: 2026

Mode: Individual

Pledge
Status:

- All
- Canceled
- Completed
- Open

Webform 2.0 Receipt Report

NAR - Webform 2.0 Receipt Report

Description: Note: only forms with transactions will be listed below.

Instructions: Please select the form name and recognition year and then click Run Report.

Webform:

2026 AK Southeast Alaska August Raffle
2026 AK Southeast Alaska RPAC Auction
2026 AK Valley BOR RPAC Easter Auction
2026 AL Athens-Limestone ARPAC Bake Basket & Plant
2026 AL Birmingham RPAC Auction

Recognition Year:

2026

[Run Report](#)

The **Webform 2.0 Receipt Report** provides a list of transactions created through Aristotle webforms/investment forms.

Users can select multiple webforms to view transactions from more than one webform in a single report.

Note: Receipts are displayed based on the Recognition Year selected. A single webform may have investments associated with different recognition years.

Event Summary Report

The **Event Summary Report** provides detailed information for the specific event selected.

The report includes:

- Member information
- Investment amount
- Webform name, if used
- Pledges
- Attendees
- Total receipts

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](#)

Thank You

We hope this guide helps you confidently navigate Aristotle 360, understand individual records, and make the most of the PAC Management reports.

Training and Support

Aristotle 360 system and reporting training sessions are offered twice each month and are available for an introduction or a refresher.

For additional questions or assistance, please reach out to the Aristotle Team.