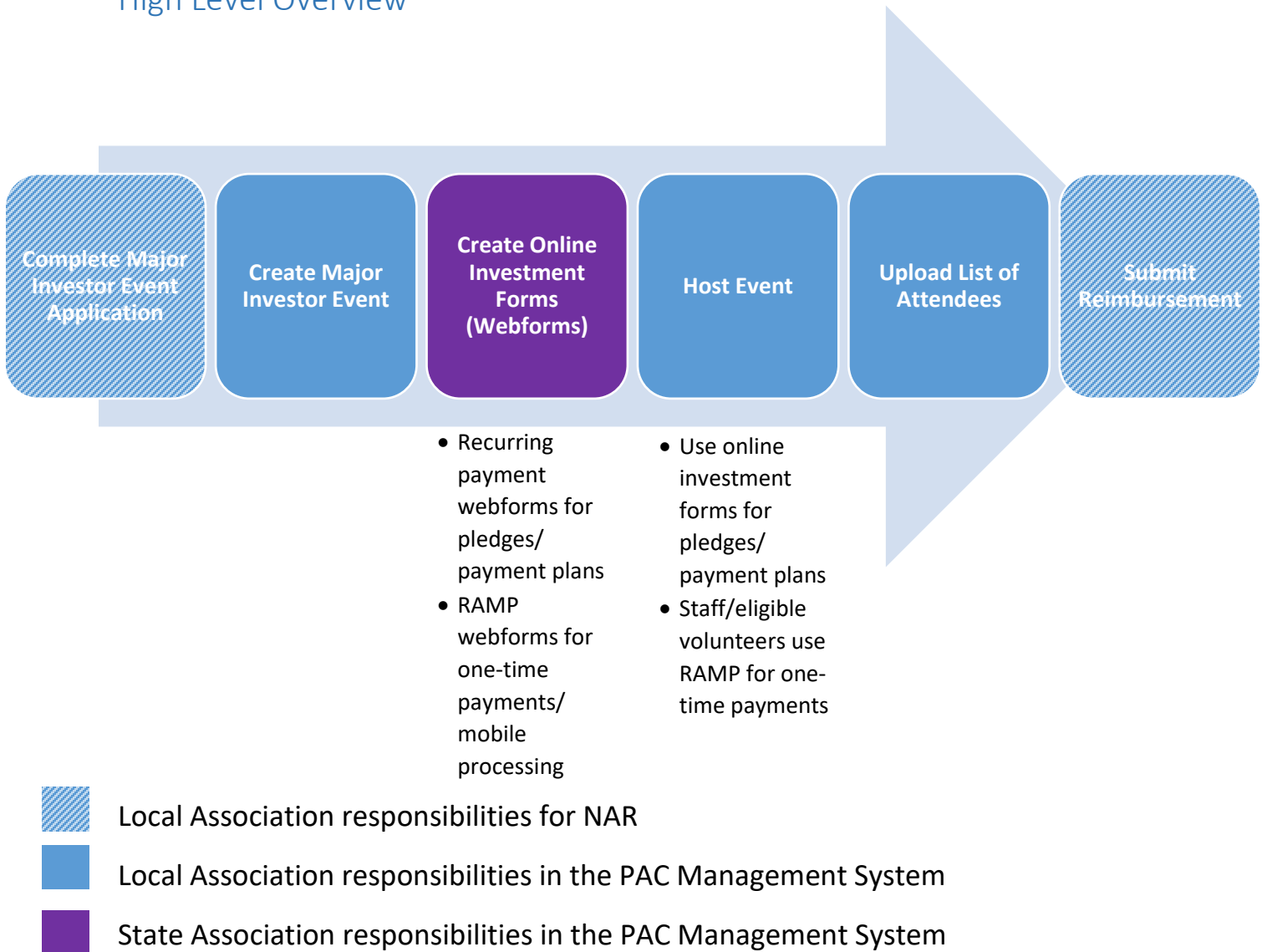


Major Investor Events Guide – Setup, Tracking and Reimbursements

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High Level Overview



If you need a refresher on the PAC Management System or assistance executing these tasks, please contact Jennifer Hamilton Jennifer.Hamilton@aristotle.com or Brandon Garner Brandon.Garner@aristotle.com

Major Invest Event Checklist

- Apply to host a Major Investor Event.
- Select a date
- Secure a venue
- Identify invitees
- Set-up Major Investor Event in the PAC Management System
- Request that your State Association sets up online investment forms (webforms) to take credit card payments for. Send the name of the Major Investor Event you set up in the PAC Management System to the State Association as they will need that information for the webform. The State Association will set up the following webforms:
 - Recurring payment/pledge login webform. You will need the investor's NRDS ID to take credit card payments through the webforms
 - RAMP webforms* for taking credit card payments via phone/tablet
- Invite attendees
- Ensure you have 1 or more laptops available to take credit card payments via online investment forms
- If you are using RAMP, all users understand how to use the application
- Event materials, nametags, etc. include NRDS IDS. This will make credit card processing faster.
- When event is over, upload list of attendees to event in the PAC Management System
- Submit reimbursement to NAR

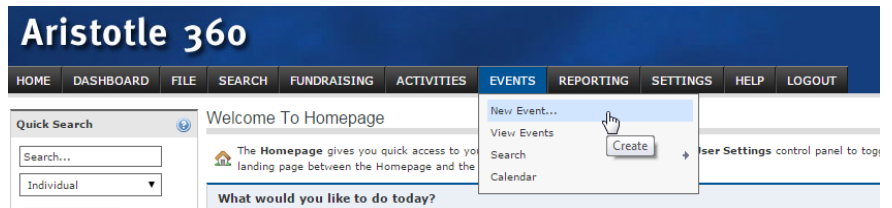
***In the event of check investments, it is the responsibility of the local to notify the state association of the event name in order to properly get credit for this investment at your event.

*To use RAMP, State Associations must sign an agreement with NAR. Once the State Association has signed the agreement, State Associations manage the roll-out of the application to Local Associations.

If you need additional training on how to use RAMP, please contact Jennifer Hamilton Jennifer.Hamilton@aristotle.com or Brandon Garner Brandon.Garner@aristotle.com

Creating a Major Investor Event in the PAC Management System

- To create an event in the PAC Management System, go to the Events tab and click New Event.



- Fill in the Event Title using the following naming scheme:
Rec Year – State Abbreviation – Local Name Major Investor Event E.g. 2018 AZ-Tucson Major Investor Event (or 2018 AZ-MI Event).

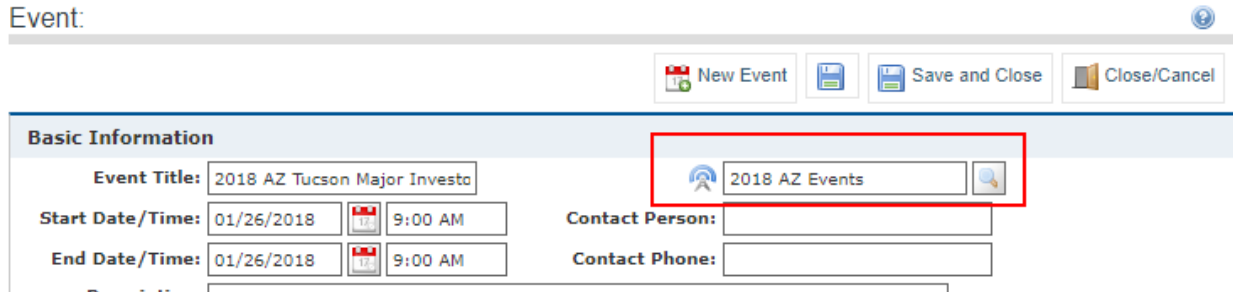
Event:

- Click in the field that says “Click to Select Program”. A search window will open. Type in “[State Abbreviation] Event” and click the magnifying glass. E.g. AZ Events.

Event:

4. Select the appropriate program for the recognition year by double clicking your selection. Once you double click your program, the search window will close and the name will appear in the program field

Event:



Event:

New Event Save and Close Close/Cancel

Basic Information

Event Title: 2018 AZ Tucson Major Investo

Start Date/Time: 01/26/2018 9:00 AM

End Date/Time: 01/26/2018 9:00 AM

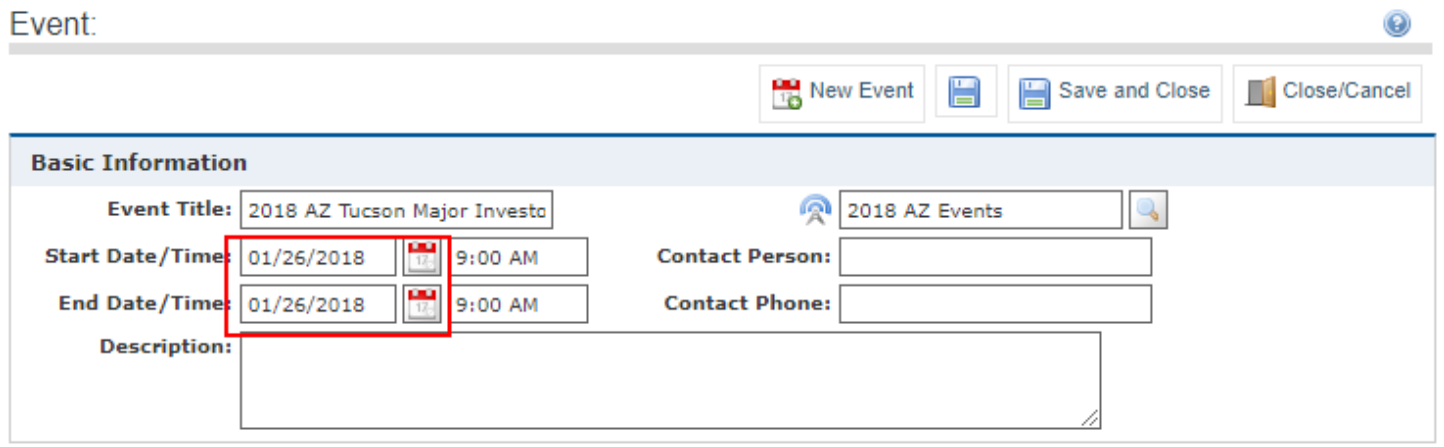
Contact Person:

Contact Phone:

2018 AZ Events

5. Fill in the event date in both the Start Date/Time and End Date/Time fields (you can always change the date).

Event:



Event:

New Event Save and Close Close/Cancel

Basic Information

Event Title: 2018 AZ Tucson Major Investo

Start Date/Time: 01/26/2018 9:00 AM

End Date/Time: 01/26/2018 9:00 AM

Contact Person:

Contact Phone:

2018 AZ Events

Description:

- Click the save icon.



Once you have saved your event, more options will appear in the event page.

- Expand the Event Details blade, and select your state from the dropdown menu.

Event Details (Click to Expand\Hide)

<p>EVENT LOCATION DETAILS</p> <p>Address Line 1: <input type="text"/></p> <p>Address Line 2: <input type="text"/></p> <p>Address Line 3: <input type="text"/></p> <p>City: <input type="text"/> </p> <p>State / Zip: AZ <input type="text"/></p> <p>Fax: <input type="text"/></p> <p>Email: <input type="text"/></p> <p>Notes: <input style="width: 100%; height: 40px;" type="text"/></p>	<p>RSVP INFORMATION</p> <p>RSVP Deadline: <input type="text" value="7/26/2021"/></p> <p>Date: </p> <p>RSVP Line 1: <input type="text"/></p> <p>RSVP Line 2: <input type="text"/></p> <p>RSVP Line 3: <input type="text"/></p> <p>RSVP City: <input type="text"/></p> <p>RSVP State / Zip: FM / <input type="text"/></p> <p>RSVP Phone: <input type="text"/></p> <p>RSVP Fax: <input type="text"/></p> <p>RSVP Email: <input type="text"/></p> <p>Event Budget: <input type="text" value="0.00"/></p>
---	---

- To find your event again, go to Events>View Events. If your event does not appear in the list of events, change the From date in the Date Range field. Click Search.

Aristotle 360

HOME DASHBOARD FILE SEARCH FUNDRAISING ACTIVITIES EVENTS REPORTING SETTINGS HELP LOGOUT

Quick Search

Individual

Welcome To Homepage

The Homepage gives you quick access to your landing page between the Homepage and the User Settings control panel to toggle

What would you like to do today?

DATA ENTRY

Print Search Results New Event

Search for existing events

Event Title:

Contact Person:

City:

State: All

Date Range: From: 9/20/2015 To:

Available Events

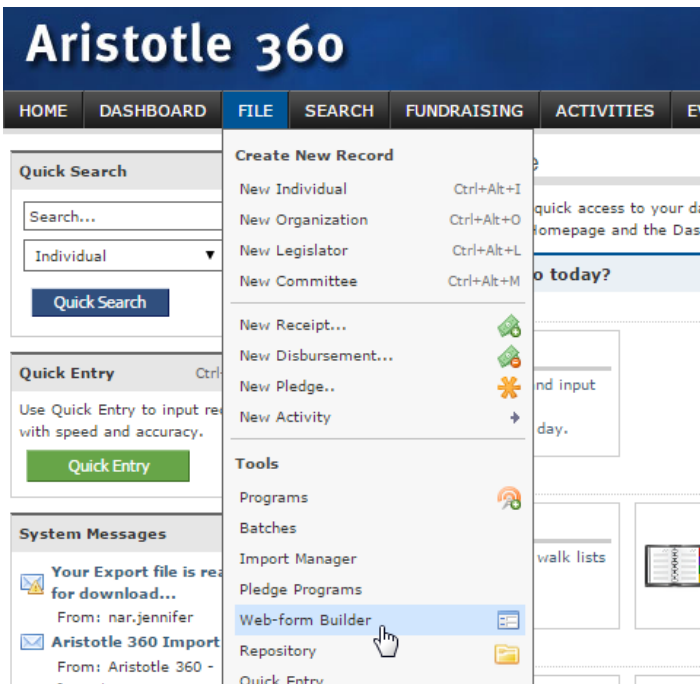
Below is a listing of your available events. Open the event edit screen by clicking on the row of your choosing.

Number of selected events: 5

Search	Event Title	Start Date	Time	Contact Person	City
	Realtor Expo	09/24/2015	09:00 AM	Steve Huffman	
	2015 AAR Bunco Tournament	10/01/2015	09:00 AM	Kate Ligouri	
	TAR Holiday Helper	10/01/2015	09:00 AM	Steve Huffman	

Creating Recurring Investment Webforms (with pledges) for Major Investor Events

1. To find your state's event webform template, go to File>Webform Builder.



2. Type the word "event" into the webform search field, and click Enter.
3. Locate the webform specific to your state 2018 [State Abbreviation] Event Webform and click the Copy icon. E.g. 2018 WY Event Webform.

The screenshot shows a table titled 'Web-Forms' with a search bar containing 'Event'. The table has columns for 'Name', 'Created On', 'Created By', and 'Copy'. Two rows are visible:

Name	Created On	Created By	Copy
Copy of: 2018 WY Event Webform	01/21/2018	Jennifer Ha...	
2018 WY Event Webform	12/27/2017	Brandon Ga...	

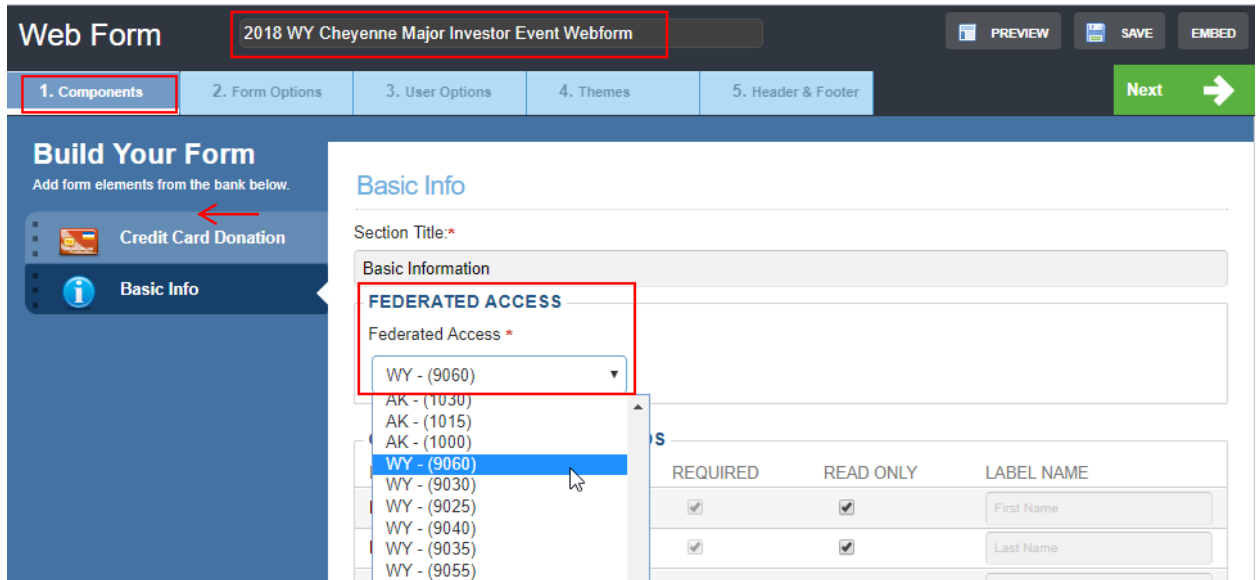
4. Open the Copy of: 2018 [STATE] Event Webform. A pop-up window will open.

This screenshot is identical to the previous one, showing the 'Web-Forms' table with the search results for 'Event'. The 'Copy of: 2018 WY Event Webform' row is highlighted with a red box, and the 'Copy' icon is also highlighted with a red box.

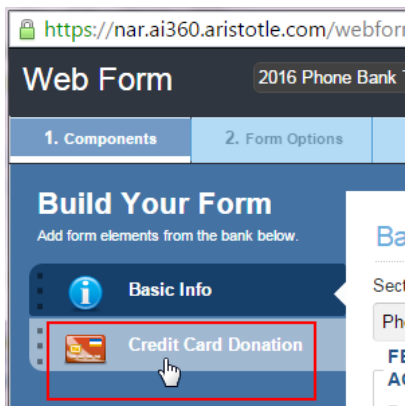
- You will be taken to the first step of the webform builder. **1. Components.**
Rename the webform according to this naming convention:
Year – State Abbreviation – Local Name/Abbreviation – Major Investor Event

Click Save. Do this frequently.

- On the **Basic Info** panel, update the **Federated Access** Local Association's 4-digit access code.
The template will be set to the state's federated access.



- Click the panel for **Credit Card Donation** on the left hand side.



8. Change the **Recurrence** field to **Both**. This allows the webform to accept one-time and recurring payments. Change the **Contribution Duration** field to **Specific Date** and select the date (prior to the end of the recognition year) when you want the payments to finish. Change the **Donation Option** field to **Total Payment**.

The screenshot shows the 'CREDIT CARD INFORMATION' form with the following fields and values:

- Section Title: Credit Card Investment
- Instructions: (empty text area)
- Account: IA - Aristotle Online
- Type: Credit Card
- Period: Other - 2015
- Source: Online
- Advocate: (empty dropdown)
- Recurrence: Both (selected in the open dropdown menu)
- Recognized: 2016
- Contribution Duration: Specific Date
- End Date: 12/01/2016
- Donation Option: Total Payment

9. Scroll down to **Donation/Giving Levels**. You will be on the "Total Payment" tab. To add engagement levels (the total amount you are asking your investor to make) enter information into the Amount field and click Add. Repeat until all your engagement levels are there. If you want a special name to appear next to the engagement level, fill in the Label field. E.g. \$1000 – Sterling R. Do not enter the "\$" – that will appear after you click "Add."

DONATION/GIVING LEVELS

ENABLED

Multiple Payments **Total Payment**

Amount (in \$): * Label: Default:

\$500.00
\$1000.00 - Sterling R (Default)
\$2500.00 - Crystal R
\$5000.00 - Golden R

Other Amount

Label:

Default:

Default Donation: Donation Limit:

Add **X**

10. To edit or remove an engagement level, click on the amount and click Edit to change the amount or click the red **X** to remove the amount.

DONATION/GIVING LEVELS

ENABLED

Amount (in \$): * Label: Default:

Edit **X**

11. To allow investors to select their own engagement level, check the box that says Other Amount. Enter a label for how you want the field to display on your webform. E.g. Other Investment Amount. Click Save.

DONATION/GIVING LEVELS

ENABLED

Amount (in \$): * Label: Default: [Edit](#) ✕

⬆️
⬇️

Other Amount

Label: [Other Investment Amount](#)

Default:

Default Donation: Donation Limit:

12. Scroll to the top of the webform builder and click the tab for **2. Form Options**.

Web Form 2018 WY Cheyenne Major Investor Event Webform PREVIEW SAVE EMBED

1. Components **2. Form Options** 3. User Options 4. Themes 5. Header & Footer Next →

INFORMATION

Section Title: Instructions:

13. Under the **Publish/Unpublish** section, determine if you want your webform to deactivate prior to 12/31/2018. All investments received on this form will credit Recognition Year 2018. If your state has deadlines prior to 12/31/2016, change the webform End Date to meet your state's needs.

Web Form 2018 WY Cheyenne Major Investor Event Webform PREVIEW SAVE EMBED

1. Components **2. Form Options** 3. User Options 4. Themes 5. Header & Footer ← Previous Next →

PUBLISH/UNPUBLISH

PUBLISHED

Forever

Start and End Date

Start Date:

14. Under the **Email Notification Options**> **Internal Notification** section, verify the email address of the person(s) at the state/local who want to receive notification of each investment made on the webform. Separate multiple emails with a comma. Change the subject line of the internal email as you wish. In the body of the internal email, update the name of your webform.

1. Components | **2. Form Options** | 3. User Options | 4. Themes | Previous | Next

ENABLED

Email Notifications allow you to configure an email to be sent to yourself or your web-form submitters.

Internal Notification

ENABLED

Email Address: name@myassociation.com, name2@mya

Subject: Major Investor Event

Owner Email Text:

The following investment was made online through Aristotle - PAC Management System via webform [WEBFORM NAME].

15. On the **Form Submitter Confirmation Message** section, review information in the auto-generated email your investor will receive with their receipt information. Verify the fields for Subject, From Email and From Name (from name can be as simple as Georgia REALTORS® or can be the name of a state staff member.) Click Save.

Form Submitter Confirmation Message

ENABLED

Subject: Thank You for RPAC Investment

From email: name@myassociation.com

From name:

User Email Text:

You personalize this message.

16. Ensure the **Recurring Transaction Notification** button is enabled. Verify the fields for Subject, From Email and From Name.

Recurring Transaction Notification
ENABLED

Subject: Thank You From email: mark@iowarealtors.com From name: Mark Gavin, Iowa REALTORS

User Email Text:

Thank you for investing in Iowa RPAC.

17. Scroll to the top of the webform builder and click the tab for **3. User Options**. Scroll down to **User Assignments**. Under the field **Assign to Event**, select the Event (the Local Association will have created this already.) Ensure that the program is assigned to your state's Event Program. E.g. 2018 WY Event Program.

Web Form 2018 WY Cheyenne Major Investor Event Webform PREVIEW SAVE EMBED

1. Components 2. Form Options **3. User Options** 4. Themes 5. Header & Footer Previous Next

USER ASSIGNMENTS

Assign to Category
You can assign a category to your form users
Group Category:
Assign to group:

Assign to Program/Event
You can assign a category to your form users
Assign to Program: 2018 WY Events
Assign to Event:
Assign form-entered individuals to program as:
 Targets Participants

18. Ensure that the Authentication Type is set to Standard. This means you will need the investors NRDS ID to log into the form.

AUTHENTICATION

Below you may determine the manner in which users will be authenticated to access the Webform.

Authentication Type Standard	Authentication Options Username only
Username: * Source ID	Make basic information fields read only: <input type="checkbox"/>
	Login Instructions: Your Username is your member NRDS ID. Click HERE to retrieve

19. Click Save then click Embed (in the upper right corner.)
20. Copy the web-form URL from the pop-up window.

Web Form 2018 WY Cheyenne Major Investor Event Webform

PREVIEW SAVE EMBED

1. Components 2. Form Options 3. User Options 4. Themes 5. Header & Footer

← Previous Next →

ASSIGNMENTS

Assign to Category
You can assign a category to your form users
Group Category:
Assign to group:

Assign to Program/Event
You can assign a category to your form users
Assign to Program: Assign to Event:

Form Embedding Options

Web-form URL: https://ai360.aristotle.com/AI360FormBuilder/Form.aspx?dbid=2e166870-894a-423a-a6f7-6560a8904c6c&page_id=4066

IFrame Code: <iframe src="https://ai360.aristotle.com/AI360FormBuilder/Form.aspx" ></iframe>

Embed Code: <script src="https://nar.ai360.aristotle.com/webform/embedForm.js" ></script>

OK

AUTHENTICATION

Below you may determine the manner in which users will be authenticated to access the Webform.

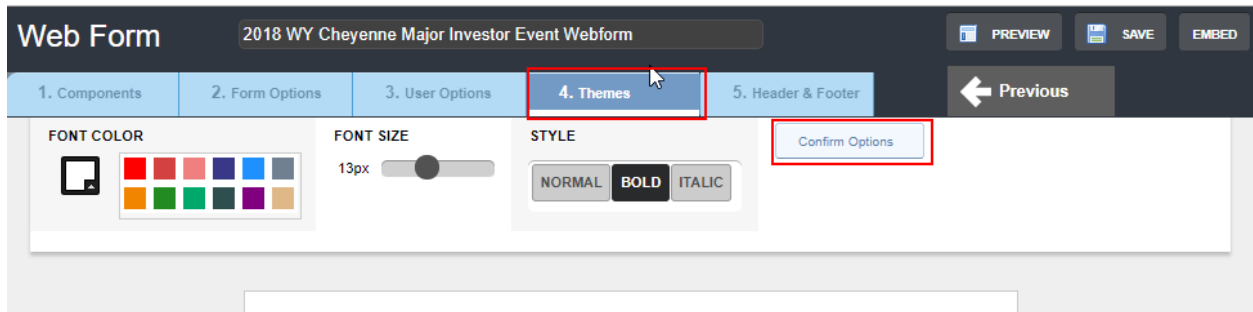
Authentication Type
Standard

Username: *
Source ID

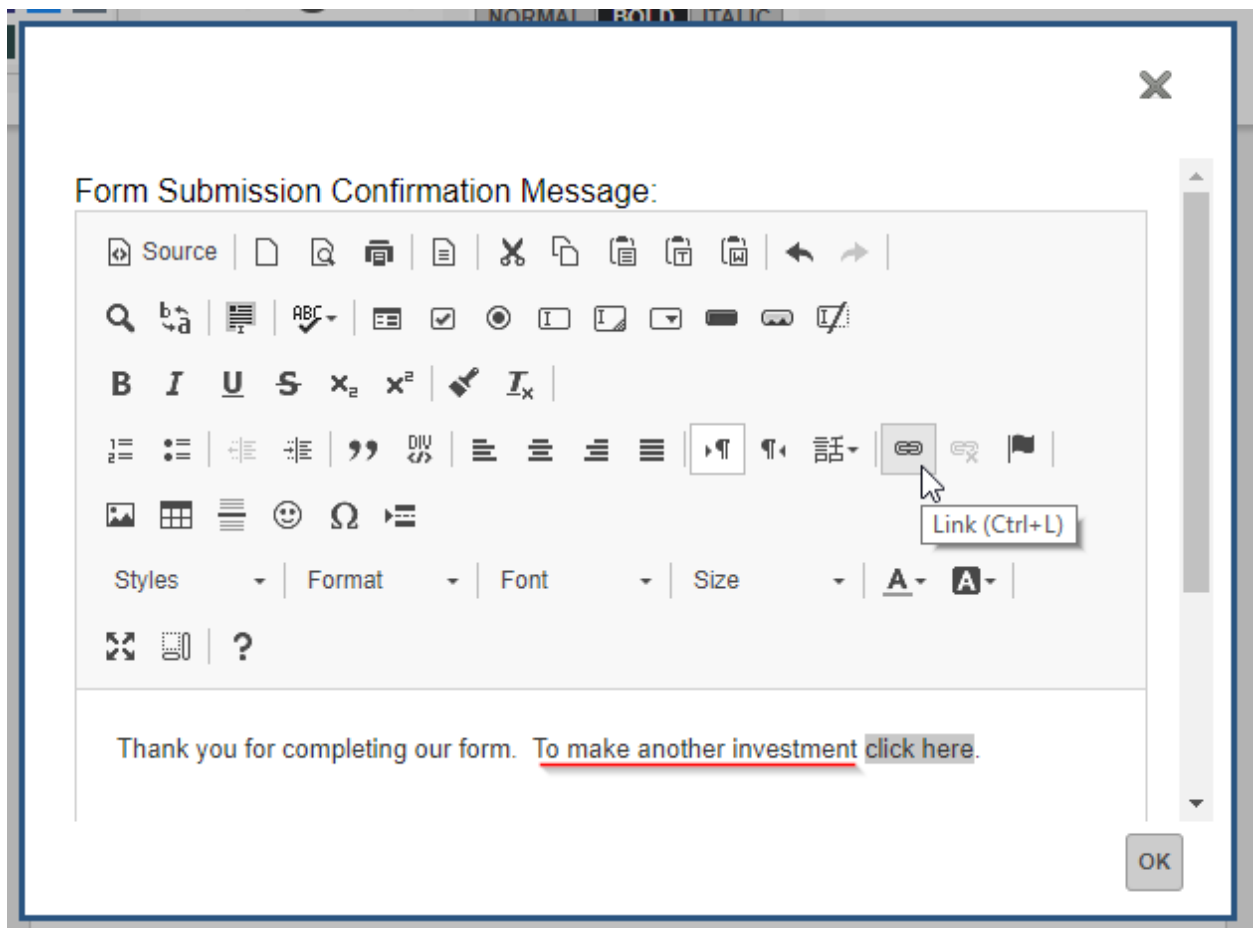
Make basic information fields read only:

Login Instructions:
Your Username is your member NRDS ID. Click HERE to retrieve

21. Scroll to the top of the webform builder and click the tab for **4. Themes**.
22. Click Confirm Options.



23. In the body of the confirmation message, type in the text "To make another investment, click here."
24. Highlight the text that says "click here" then click the link icon.



25. Paste the webform URL link in the URL field. This allows you to go back to the beginning of the webform to take another investment (after you complete a transaction).

The image shows a 'Link' dialog box with the following fields and options:

- Link Info** (selected tab)
- Display Text:** click here
- Link Type:** URL
- Protocol:** https://
- URL:** ai360.aristotle.com/AI360FormBuilder/Form.aspx?dbid=2e16
- Buttons:** Browse Server, OK, Cancel

26. To view the webform, either click Preview or click Embed>Webform URL.

Creating RAMP Webforms for Major Investor Events

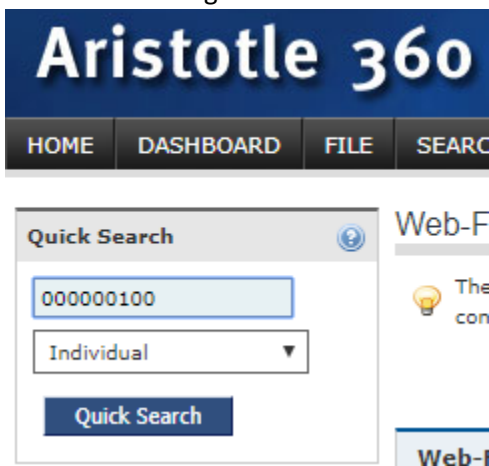
Reminder – RAMP only allows for one-time payments option.

Identify in advance who will be using RAMP at the event. You must enable these users as “advocates” first, then link them to the RAMP webform.

If users have used RAMP before (at other events, on other webforms) you do not need to enable them again.

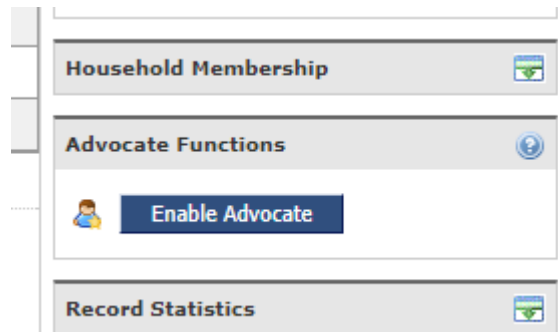
Enable Advocates

1. Locate the individual’s record in the PAC Management System via Quick Search. You may enter the name or 9-digit NRDS ID.



The screenshot shows the Aristotle 360 interface. At the top, there is a navigation bar with buttons for HOME, DASHBOARD, FILE, and SEARCH. Below this is a 'Quick Search' panel with a text input field containing '000000100', a dropdown menu set to 'Individual', and a 'Quick Search' button. To the right of the search panel, there is a 'Web-F' section with a lightbulb icon and the text 'The con'. Below that, a 'Web-I' section is partially visible.

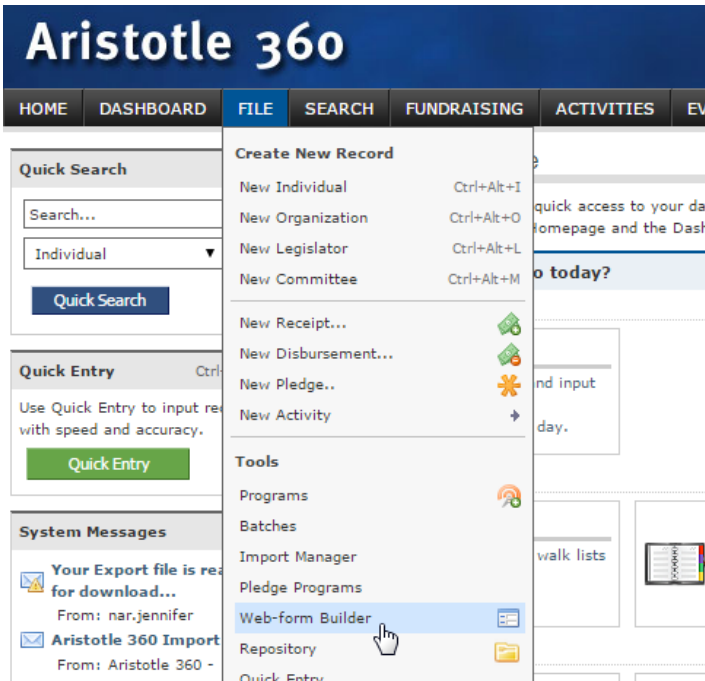
2. In the individual record, look at the right side and find the Advocate Functions Panel.
3. Click the button that says Enable Advocate.
4. Once that button is clicked, the system populates advocate information for Advocate ID and Advocate Password. You will need to give this information to the advocate so he can log in to RAMP.
5. Repeat until all advocates using RAMP at the event are enabled.



The screenshot shows a vertical sidebar of panels. The top panel is 'Household Membership' with a small icon. Below it is the 'Advocate Functions' panel, which contains a blue button with a person icon and the text 'Enable Advocate'. The bottom panel is 'Record Statistics' with a small icon.

Set-up RAMP Webform

- To find your state's RAMP webform, go to File>Webform Builder.

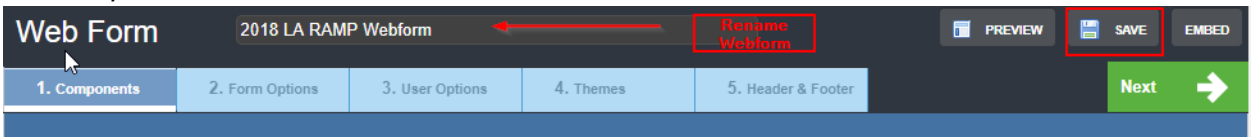


- Type the word "RAMP" into the webform search field, and click Enter.
- Locate the webform specific to your state 2018 [State Abbreviation] RAMP Webform and click the Copy icon. E.g. 2018 LA RAMP Webform.

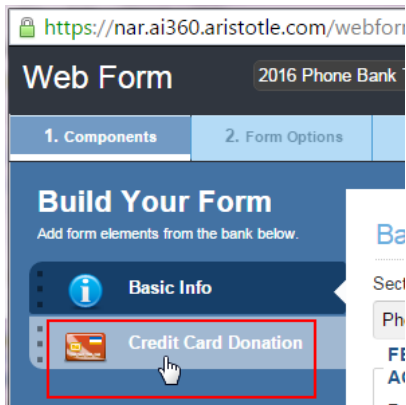
The screenshot shows a table of webforms with the following columns: Name, Created On, Created By, Copy, and an additional column. The search term 'RAMP' is entered in the search field. The table lists several webforms, including '2018 LA RAMP Webform', which is highlighted with a red box around its Copy icon.

Name	Created On	Created By	Copy	
2018 MI RPAC 2 AE Forum Meeting RAM	01/16/2018	Aaron Daniels		
2018 LA RAMP Webform	01/03/2018	Brandon Ga...		
2018 GA RAMP Webform	01/03/2018	Brandon Ga...		
2018 CO RAMP Webform	01/03/2018	Brandon Ga...		

- Rename your new form – "Year-StateAbbreviation-Local-RAMP - Event Name". Click Save.

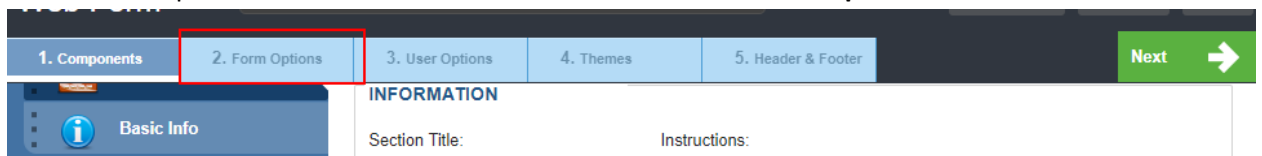


10. Click the panel for **Credit Card Donation** on the left hand side.

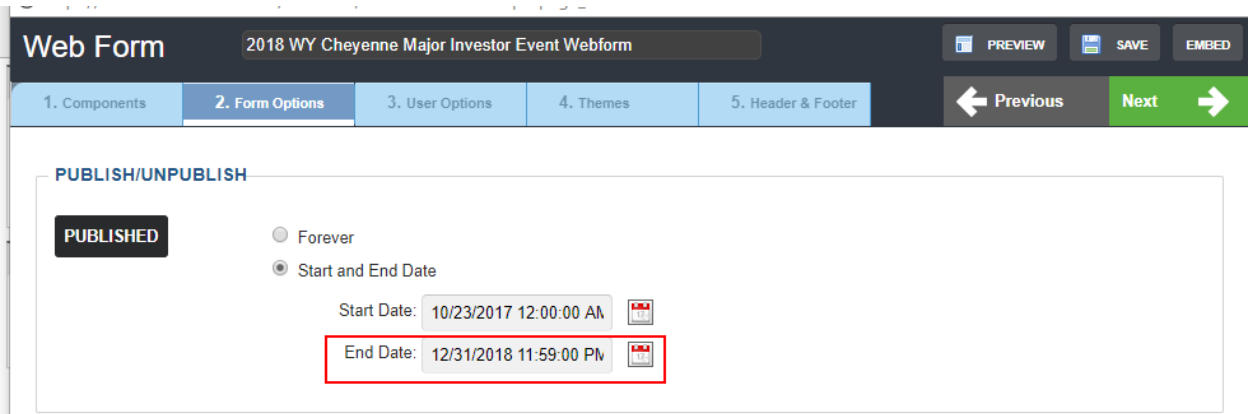


11. Scroll down to the Donation/Giving Levels section. Update the engagement levels by using Add or Edit buttons. Suggest amounts: \$500, \$1000, \$2500, \$5000, and enable Other Investment Amount.

12. Scroll to the top of the webform builder and click the tab for **2. Form Options**.



13. Under the **Publish/Unpublish** section, determine if you want your webform to inactivate after the event is over.



14. Under the **Email Notification Options > Internal Notification** section, verify the email address of the person(s) at the state/local who want to receive notification of each investment made on the webform. Separate multiple emails with a comma. Change the subject line of the internal email as you wish. In the body of the internal email, update the name of your webform.

1. Components | **2. Form Options** | 3. User Options | 4. Themes | Previous | Next

ENABLED

Email Notifications allow you to configure an email to be sent to yourself or your web-form submitters.

Internal Notification

ENABLED

Email Address: name@myassociation.com, name2@mya

Subject: RAMP Event

Owner Email Text:

The following investment was made online through Aristotle - PAC Management System via webform **[WEBFORM NAME]**.

15. On the **Form Submitter Confirmation Message** section, review information in the auto-generated email your investor will receive with their receipt information. Verify the fields for Subject, From Email and From Name (from name can be as simple as Georgia REALTORS® or can be the name of a state staff member.) Click Save.

Form Submitter Confirmation Message

ENABLED

Subject: Thank You for RPAC Investment

From email: * name@myassociation.com

From name:

User Email Text:

You personalize this message.

16. Ensure "Mobile Enabled" is checked.
17. To link advocates to webform, type the advocate's name or NRDS ID into the filter field and click the magnifying glass.
18. When the advocates name appears, click the Add button.

Web Form 2016 NAR RPAC RAMP TEST

1. Components 2. Form Options 3. User Options 4. Themes

PREVIEW SAVE

← Previous Next

MOBILE

Mobile Enabled

Search for advocates in the Filter Box

Filter

All Advocates

- A.Colleen Allen - 6713
- A.J. Yarbrough - 6569
- Aaron Daniels - 2503
- Aaron Davis - 6844
- Aaron Manis - 6640
- Aaron Ravdin - 5781
- Aaron Taylor - 4739
- Abby Krist - 2842
- Abigail Thompson - 2137
- Ada Sanchez - 2982

Assigned Advocates

- Peter Kelly - 1001
- Laura Camp - 1010
- Kirsten Ott - 1006

ADD REMOVE

19. When all advocates are added, scroll to the top of the webform builder and click the tab for **3. User Options**. Scroll down to **User Assignments**. Under the field **Assign to Event**, select the Event (the Local Association will have created this already.) Ensure that the program is assigned to your state's Event Program. E.g. 2018 WY Event Program.

Web Form 2018 WY Cheyenne Major Investor Event Webform

1. Components 2. Form Options 3. User Options 4. Themes 5. Header & Footer

PREVIEW SAVE EMBED

← Previous Next →

USER ASSIGNMENTS

Assign to Category

You can assign a category to your form users

Group Category:

Assign to group:

Assign to Program/Event

You can assign a category to your form users

Assign to Program:

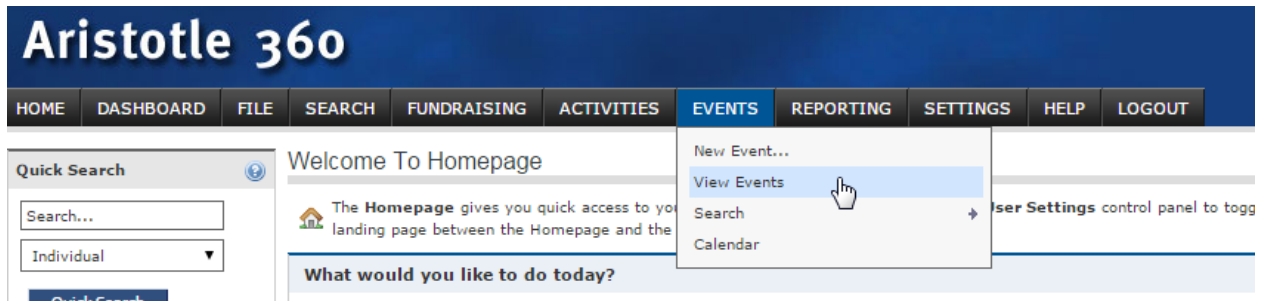
Assign to Event:

Assign form-entered individuals to program as:

Targets Participants

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.



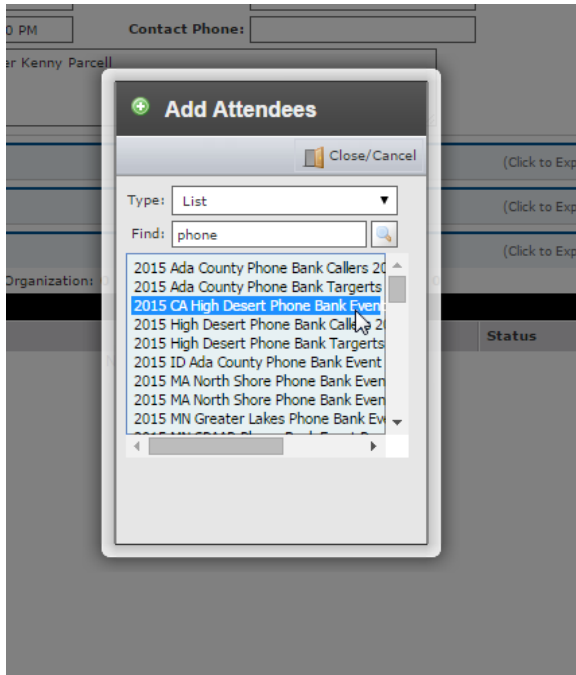
3. Select your event.
4. To add attendees, expand the attendees panel and click Add Attendee/Participant. If you want to add a multiple attendees, click the selection for Add List. If you want to add just one attendee, skip to Step 7.

The screenshot displays the event management interface for 'MI Event- San Antonio, TX'. The interface is divided into several sections:

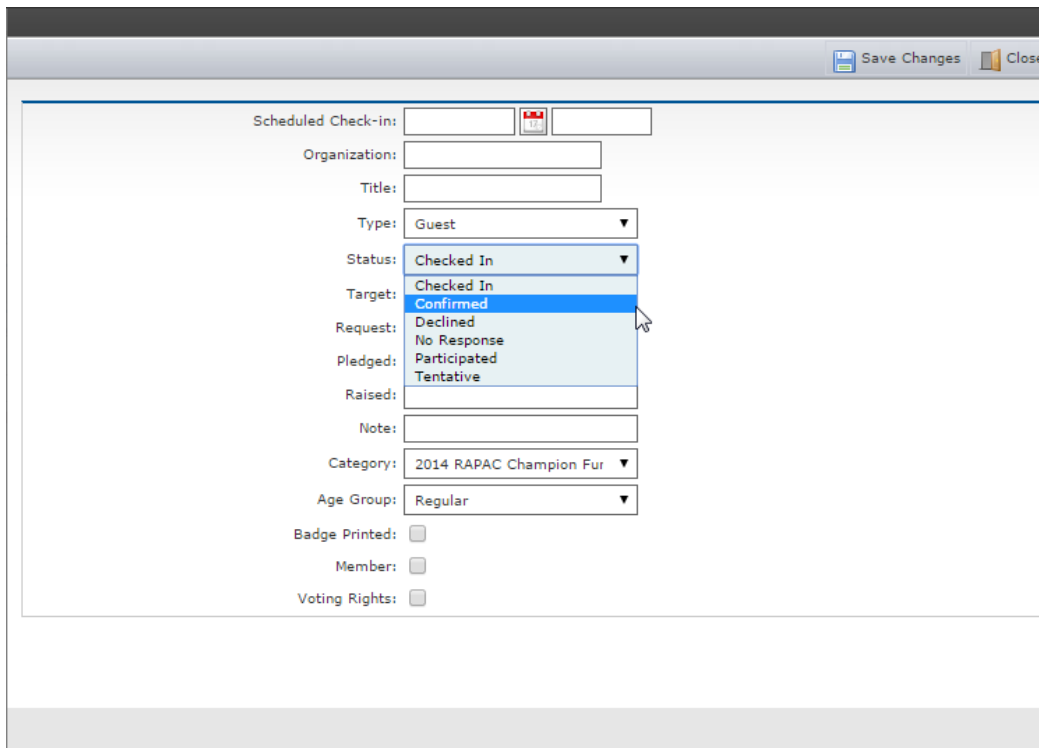
- Basic Information:** Includes fields for Event Title, Start Date/Time, End Date/Time, Contact Person, and Contact Phone. The description is 'Reception Event- Speaker Kenny Parcell'.
- Event Details:** A section that can be expanded or hidden.
- Tickets:** A section that can be expanded or hidden.
- Attendees:** A section that can be expanded or hidden, showing counts for Individuals, Organization, and Committees.
- Search:** A table with columns for View Details, Attendee Name, Type, Category, and Status. It currently shows 'No records found'.
- Record Functions:** A sidebar with links for 'Add to Outlook (ics)', 'Add Receipt', 'Add Disbursement', 'Add Pledge', and 'Add Note'.
- Web-Forms:** A section with an 'Add New Web-Form' button.
- Record Statistics:** A sidebar showing 'General' statistics such as Created On, Created By, Modified On, Contact Person, and Organizational Unit. It also includes 'Pledges' statistics like Total, Outstanding Total Value, and Number of Outstanding.
- Participation Status:** A sidebar showing 'Checked In' and 'Confirmed' counts.

At the bottom of the Attendees section, there is a button labeled 'Add Attendee' with a dropdown menu. The dropdown menu has three options: 'Add One', 'Add List' (which is highlighted with a red box), and 'Add Quick Selection'.

5. Enter your list name (or part thereof) in the search field and click the magnifying glass. Double click your list.

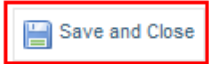


6. Change the field for Participation Status to "Confirmed" and click Save Changes.





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.


Add Attendees



Individuals | Organizations | Committees | Legislators

Search

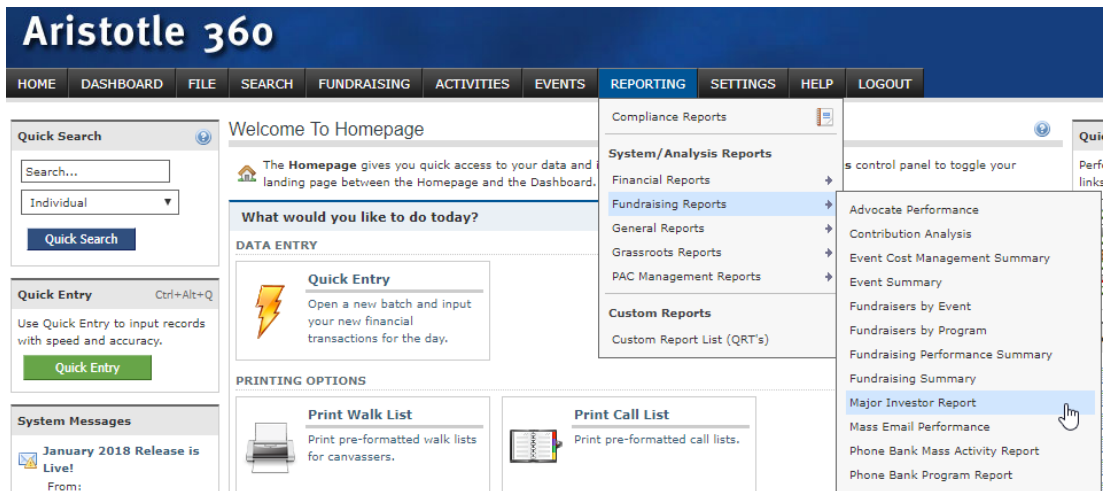
Name	Address	Select
 Kirsten Ott	500 New Jersey Ave., NW Washington DC	<input checked="" type="radio"/>
 Kirsten J Otto	15558 Explorer Circle Park Rapids MN	<input type="radio"/>

 Page 1 of 1 (2 items)

Reporting

Please note, the Major Investor Event Report show the status of all events in the state, not just for the local association and is not exclusive to Major Investor Events.

1. To view the Major Investor Event Report, go to Reporting>Fundraising Reports>Major Investor Report



2. Scroll through the list to find your state's event program and click Run Report. (You do not need to enter a date range) E.g. 2018 UT Events

Major Investor Report

Search Criteria

Program Status:

Program(s):

Event Date Range:
Start Date:
End Date:

3. Report results will preview in PDF, and you can export results to .CSV or PDF

Search Criteria

Program Status:
All ▼

Program(s):
2018 MI Events
2018 MI Phone Banks
2018 MI Website Program
2018 MN Email Program
2018 MN Events

Event Date Range:
Start Date:
End Date:

Run Report

Major Investor Report

1 of 1

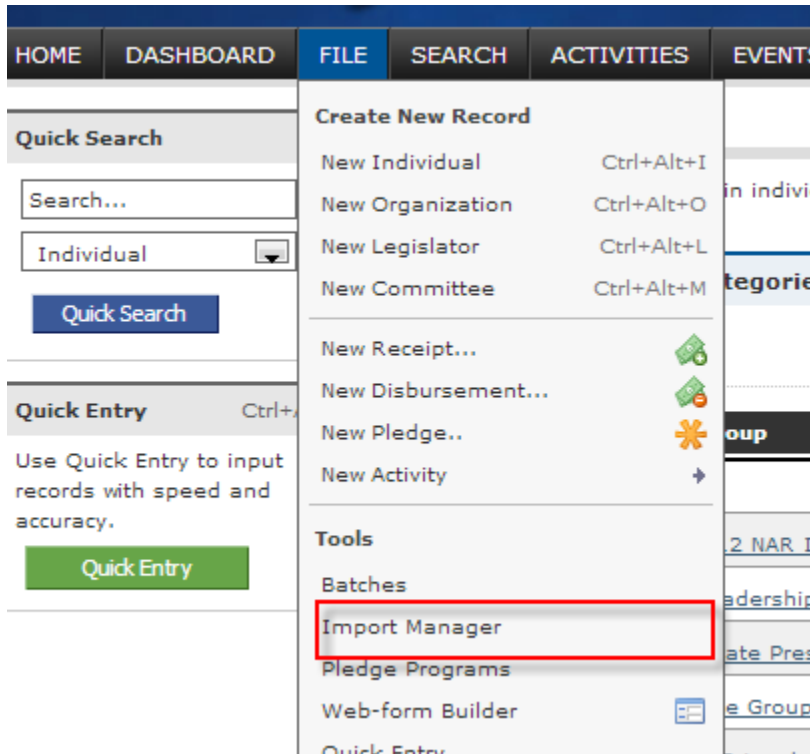
XML file with report data
CSV (comma delimited)
PDF
MHTML (web archive)
Excel
TIFF file

Date of Report: 1/21/201

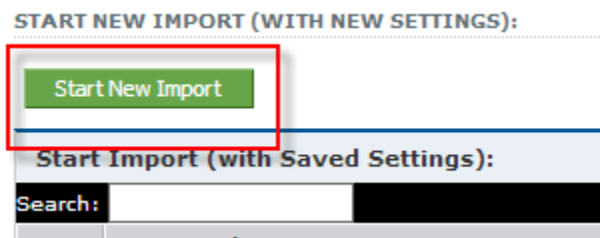
Major Investor Report
CSV (comma delimited)

Supplemental Information – Creating Lists

1. Go to File – Import Manager.



2. Click Start New Import



3. Click the **Browse** button to select your source file. File must be saved as .csv or .xls (Excel 97-2003) Leave import type as **Individual**, type in the **Import Title**, and select the **Federated Group**.

Then check the box **“first row contains column headings.”** There can be no spaces above the first row of headings.

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:

(Max File Size: 50MB)

Import Type:

Import Title:

Description:

Federated Group:

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

Next

Cancel

4. Click **NEXT**
5. 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: 2014 Association Management Committee

Source File:

Source File Type: XLS

Destination Data Type:  Individual

Number of Records: 17

6. Now you must map your data to the AI360 database.
 - a. Select the row with the NRDS number (in the **Source Preview Column**), and under the **Field Data Type** menu, select **Basic Info**.
 - b. This will prompt a window in the destination field, select **Source ID** from the menu.

DATA MAPPING:

Source Column	Source Preview	Line	Field Data Type	Destination Field	Default Email	Validation
(1) E-Mail Display Name	Marlys Lien	1	-- Do not Import			
(2) First Name	Marlys		-- Do not Import			
(3) Last Name	Lien		-- Do not Import			
(4) E-MailAddress	mrtylie@eoni.com		-- Do not Import			
(5) NRDSMember_id	698000041		Basic Info	Source ID		

7. To create a List, type in the name of your list under the header Step 4B: Assign to List. This is a required step for creating Major Investor Event lists.
8. Then click Add New List. Wait until you get a pop-up notification that says “your list was successfully added.

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 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.

9. Click Next

10. Select the following criteria in the Record Matching page:

ADDING NEW

Create Non-Existing Individuals

Ignore Non-Existing Individuals

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

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

11. Click Next

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

<https://nar.ai360.aristotle.com/AI360Import/AI360Import/import.aspx?validateID=b9dfe3ab-8e23-466d-b403-l>

Aristotle 360 Import Wizard
This wizard allows you to import a list of individuals, organizations, transactions and other related records.

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](#)