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Custom Reports

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

Under the **REPORTING > Custom Reports (QRT’s)** section, you will find the following useful reports:

- **NAR – Local Board Performance** – contributions by Local Board. You can choose to run this report by Individual (aggregate for the individual under each local board), Detail (all transactions for individual in a local board), or Local (aggregate for the entire board). You may see receipts from other boards in this report. Those are receipts that were given to your board by a member of another.

- **NAR – State Awards** – contributions for state/local level donor clubs that are $99 and above.

- **Major Investor Recommendations** – 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.

- **Major Investor** – This report creates a list of the NAR Major Donors by State, Level and Years.

- **Individual Summary Report** – Total RPAC investment detail for one member.

- **President’s Circle Report** - Generates report of NAR President’s Circle members and their RPAC investments.

- **Group Performance Report** – RPAC Investments from members of a group of State/Local level committees. Your Association’s Committees can be imported to the system as Groups by the Aristotle data team.

- **Office Performance Report** – contributions by offices within a local board.
NAR – Local Board Performance Report

Purpose
Performance report by Local Association. The report can display the information in a variety of levels:

- **Detail**: Each transaction from an individual within each Local Association. For example, if John Smith invests $50 and $100 to one Local Board, both of those transactions will be displayed as separate line items.

- **Individual**: Aggregate for each member who has contributed to a local. For example, if John Smith invests $50 and $100 to one Local Association, this level of the report will display John Smith’s total of $150 as a single line item. This report also shows outstanding Major Investor pledges, individual contributions to the President’s Circle, and each members’ portion of the contributions to NAR (including the divide between hard and soft dollar contributions).

- **Local**: Aggregate by Local Association, split into individual and organization investment totals. 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).

- **Local Summary**: Aggregate for the entire Association, made up of individual and organization contributions. No transaction detail is included in this level.

- **Non-Giving**: Displays contact information for all individuals who have primary membership in a Local Association, who have not yet invested in RPAC within the specified recognition year or timeframe. Information included on this report: home/work/mobile phone, email, member type, office ID, office name, office address and email.
Click the drop-down arrow on the **Level** field and select the report you would like to see. Levels are described above.

Select the Recognition Year that you would like to review. Defaults to the current NAR Recognition Year.

Enter date parameters, if you do not want to see the entire Recognition Year.

*Optional:*

- Enter a batch number, if you are looking for a specific batch of receipts.
- Enter a NRDS number, if you are looking for a specific member’s receipts.

Click **Run** to run the report.

**NAR – State Awards Report**

This report is used to retrieve a list of members who have reached donor levels above $99. Your Association can send Aristotle your specific state/local level award levels and they will be imported for this report.

**Report Criteria**

**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.

- **Active Only:** No
- **Include All Contributors:**
- **Received By:** Wyoming Association of Realtors (902)
- **Recognition Year:** 2013
- **Local Association:**
- **Only Show New Awards:**
- **Reached Award By:**
- **Assigned Award After:**
- **Assigned Award Before:**
- **Add Awards to Individual records:**
- **Sort:** Board, Level, Name

**Run Report**
Select your association.

Select the **Recognition Year** that you would like to review. Defaults to the current NAR Recognition Year.

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.

You may enter date parameters, though the report will always show you 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 an award must have been assigned (added to the individuals record) 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.*

You may choose to only see “New Awards.”

Click **Run** to run the 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.

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**NAR - Major Investor Recommendations**
Click the drop-down arrow on the **Year** field and select the year to review. The default is the current year.

Select the **State**.

Input and amount in the **Margin** field to determine a qualifying range. For example, entering **500** will report individuals that are $500 away from obtaining the next investor level.

Click **Run** to run the 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.

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Select your state **Association**

Click the major donor level in the **Level** field to run the report on the selected donor types (control + click to select multiple levels).

Click the year to report on in the **Year** field. The default is the current year. (control + click to select multiple years)

Click **Run** to run the report.
Individual Summary Report
Generates a report of one member's RPAC investments by recognition year.

Enter NRDS ID, select Association and click Run Report.

President's Circle Report
Generates a report of NAR President’s Circle members and their RPAC Investments.

**NAR - Presidents Circle**

- **Level**: Summary or Detail transactions.
- **State**: [Input field]
- **Year**: [Input field] - 2011
- **Start Date**: [Input field]
- **End Date**: [Input field]
- **Sort**: State

Click **Run Report**.

**Select Level**: Summary or Detail transactions.

**Enter your State**

**Select Year**

Enter date parameters, if you would like to review a specific time period.

**Select your report Sort preference**: State, Committee, Date or Member.

Click **Run Report**.

**Group Performance Report**

RPAC Investments from members of a group or State/Local level committees. Your Association’s Committees can be imported to the system as Groups by the Aristotle team.
Enter **Level** of your desired report (similar to Local Board Performance Report levels):

- **Detail**: Each transaction from individuals within the group. For example, if John Smith invests $50 and $100, both of those transactions will be displayed as separate line items.
- **Group**: Aggregate by Group. No transaction detail included in this level.
- **Individual**: Aggregate for each group member. For example, if John Smith invests $50 and $150, this level of the report will display John Smith’s total of $150 as a single line item.
- **Individual Report Display**: Same information listed above, but this report displays in a print-ready report format with summary and contribution average table at the bottom of the report.
- **Non-Giving**: Displays all group members who have not yet invested in RPAC in the specified Recognition Year or date parameters.

Select desired **Group**.

Select desired **Recognition Year**.

Select to include **Contributors** and/or **Non-Contributors**.

If you do not want to run the entire recognition year, enter specific date parameters.

Click **Run Report**.
Office Performance Report

Report of contributions broken down by offices.

Click the drop-down arrow on the Level field and select the report you would like to see

- **Office** displays the aggregate contributions of each office within the board.

- **Individual** displays each individual within an office, the amount he/she has contributed and contact information.