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How to provide Payment Data for dues payments made by check that are <u>mailed through the US Postal system</u>

This information is subject to change; You will be notified in advance of any changes.

COLLECTING DATA
There are two methods you can use to get data from your local system to IAR.

1. Enter the data directly into your own copy of the Dues Submission Template spreadsheet, the instructions for which are located here: www.illinoisrealtor.org/duespayment

2. Export the data that is maintained in your own membership system, and save the data in an Excel spreadsheet.

   a. If you export the data from your local system into an Excel spreadsheet, <u>you WILL need to format the data as shown below</u> AND delete any additional columns of data that may have been exported but NOT needed by the IAR required format.

FORMATTING DATA EXPORTED FROM YOUR LOCAL SYSTEM

If you chose option #2 from above and exported your local data into an Excel spreadsheet, your data will probably need to be edited to some degree to place it into the IAR required format.

The following information describes the required data elements to pull in to the spreadsheet. You may want to pass this information along to your technical staff for assistance in the export process.

Edit your spreadsheet to:

1. Contain the following columns of data

2. Apply certain formatting attributes to each column of data as described below.

3. NOTE:

   a. IAR requires the below fields to be fully populated with data.

   b. Please make sure the **column name** appear as the first row in the spreadsheet.

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Column			Cell Formatting
Letter	**Name**	**Alignment**	**Format according to the information below**
A	Recognition Year	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text" *Data in this field is 4 characters long to indicate year. Example: 2012*
B	Dues Month	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text" *Data in this field is 3 characters long to indicate a month's name. Example: Jan*
C	NRDS ID#	Left	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text" *Data in this field should be numeric characters of 0-9 ONLY.*
D	Last Name	Left	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text"
E	First Name	Left	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text"
F	Classification	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Text"
G	RPAC	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Number"

			In "Decimal places" enter the number 2
H	IAR Dues Amount	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Number" In "Decimal places" enter the number 2
I	IAR Advocacy	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Number" In "Decimal places" enter the number 2
J	NAR Dues	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Number" In "Decimal places" enter the number 2
K	NAR Assessment	Right	Select the cells you want and right click Select "format cells" On Number Tab, choose "Number" In "Decimal places" enter the number 2

FILE NAMING CONVENTION

After the data has been entered or extracted into an Excel spreadsheet, checked for accuracy and correctly formatted you will need to save the file and give it a name.

The file name needs to be in a certain format that consists of 13 characters followed by the file name extension.

1. The **first 4 characters** must be the board/association number.

2. The next character must be the **dash '-'** character.

3. The next 8 characters are the date the file is created (**yyyymmdd**).

4. The file extension must be **.xlsx**, signifying an Excel Spreadsheet.

5. Example for a proper file name: **3605-20120628.xls**

PREPARING YOUR DATA TO E-MAIL

By this point you have either hand entered your data into the prescribed IAR spreadsheet or exported data from your local system and formatted it accordingly and you are ready to create your e-mail, attach your data file and send to IAR.

1. If you are using the sample spreadsheet provided and keyed in your data, then dollar totals will be generated automatically and will be displayed at the beginning of the spreadsheet.

   There is nothing more left for you to do with regard to editing the spreadsheet data.

2. If you exported your data from your local system, you will need to include in your e-mail, dollar totals by type, as identified in the Dues submission spreadsheet located at http://www.illinoisrealtor.org/duespayment

3. Email your exported spreadsheet to duessubmittal@iar.org

PREPARING YOUR PAYMENT

Checks should be sent to the address as identified in the Dues submission spreadsheet located at http://www.illinoisrealtor.org/duespayment

NOTE – NAR Payments are no longer accepted at IAR; please mail directly to NAR.

Please direct any questions about Dues payments and processing to either Roger Oxby at 217-391-4831, or Debbie Harper at 217-391-4834.

Thanks for your attention to this matter.