CLASS AGENT FUNDRAISING

DATA REQUEST GUIDE

VERSION 2017.4

FREQUENTLY ASKED QUESTIONS

Reeher LLC

achieve more®

Overall

How should I format the files? CSV? Tab Delimited?
The files should be in either a comma separated values (csv) or tab delimited text (txt) format. All files should include column headers. If you are using the csv format, use double quote enclosures for any fields that could contain commas.

How should I name the files?
Name each file the same as it is named in the Data Request Guide. For example, the Entity file should be named "Entity" and should not include a date stamp or any other information that would change the naming of the file on a daily basis. If splitting a file into multiple files, name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, etc.).

Do I need to include header rows?
Yes, include a header row in each of the files. The column header names should match the names used in the Data Request Guide.

Can I break apart the files?
Yes, if you feel it would be easier to provide us the requested file by splitting one file into two or more files you may do so. For example, some customers find it easier to split the entity file into two files, one including person entities and one including non-person entities. Another example may be with Participation History, if various participations are stored in other areas/tables in your database (e.g. events are stored separately from undergraduate and alumni participations). If splitting a file into multiple files, name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, Participation_History_Events etc.).

What do I do if I don't have some of the requested data?
If you do not have a requested field, please include the column in your file with the column named in the header and the values blank. For example, if you do not track Occupation or Industry, you would still include those columns in the Entity file and include the header name for the field, but the data in the columns would just be blank.

How secure is Class Agent?
Reeher takes information security very seriously and partners with leading world class datacenters also compliant with internationally recognized information security standards and frameworks such as the ISO-27001-2013 and SSAE16. Class Agent is built on a three tier, distinct network architecture in an effort to ensure its requirements for comprehensive defense. Please request our data practices document for further information.

Do I need to send all data each night?
Yes, you should send all data files each night, and not just updates or partial files. Sometimes there is initial concern regarding the processing time for producing full files, but following the initial compilation of the files this is typically a non-issue.

How do we validate the data?
Reeher reviews your data files upon receiving them and provides feedback and guidance. We review each file field by field and work with you on resolving any issues. We also provide you several reports to verify key data, such as the breakdown of entities by relationship type and verifying your last five years of giving history.

How does Reeher monitor the files and ensure that Reeher processes 'good data' if there is an issue with my file generation?
Reeher monitors the file sizes and the row counts of each file, and before the processing of any file, there are checks that ensure the size or record count has not changed significantly (usually if it decreases by more than 5%) compared to the previous day's files. Reeher also monitors when the file was sent and if the file is multiple days old, Reeher will not process the file. If a file does not pass any of these checks, Reeher will not process the new contents of the file and instead keep the data that is in the Reeher database at that time. If a file issue persists, Reeher Support will reach out to your system administrator to work to resolve the file monitoring issues.

I am an existing Reeher customer and looking at this most recent Reeher Data Request Guide, I noticed that my file names are different than the ones in this document, should I rename my files? I noticed that some of the fields I am sending Reeher now are no longer being requested, should I remove those field(s) from my existing files?

No, please do not rename the file that you are transferring as that will negatively impact Reeher's processing of your data. Please keep the names of your files the same as they currently are being sent as. For example, if your file that stores officer assignments is named "Officer Assignments.csv" and you notice that the Data Request Guide labels it 3.5 Assignment History, you do NOT need to rename the file to reflect the new naming convention. Or, if you notice in the Entity file that you are sending Spouse Prefix, but noticed that the data is not requested in the file according to the Data Request Guide, you should NOT remove the Spouse Prefix field or any other fields you are currently sending. Please do not change the names of any existing files or existing fields and do not remove or reorder the existing fields you are currently sending.

If you have any other data questions or challenges when looking at the files requested in this document that are outside the scope of the newly added fields, please contact Reeher Support before making changes to the existing processing and files to ensure a consistent and correct transfer of your data.

Initial Reeher Implementation

What does my institution get from Class Agent?

Peer Priority Rating (PPR) –Reeher's PPR is a predictive model that helps you prioritize which prospects you should assign to your volunteers. You will receive accurate data for decision making and setting priorities

Class Agent Portal and Management Dashboard – Your management team, staff users, and volunteers will have daily dashboard-style visibility into the results of your efforts across multiple campaigns to help you monitor and measure your progress. This visibility helps your team develop trust in the organization's metrics as you work together to achieve organizational goals.

Care and Support – Your executives and users of all levels will receive ongoing support through the lifecycle of your subscription. This support expedites your results, as well as provides training and guidance that promotes rapid payback on your investment. The subscription fee also covers all software enhancements and maintenance associated with your subscription type.

My institution just became a Reeher customer. Now how do we implement Class Agent?

The Reeher Implementation process can be broken down into four quick and easy phases:

1st phase Data Collection – The Reeher Customer Care Team works closely with your key stakeholders and data contacts to set the stage for a successful implementation and guides you through a proved process for translating and mapping your data to Class Agent via a secure nightly file transfer. This phase is where 95% of the work is done by your institution (the other 5% involves testing Class Agent during the Pilot Test phase). To begin, you will send us all of your data files as requested in the Reeher Data Request Guide. We'll work with you and send feedback on your data to make sure that it matches closely to what Reeher is requesting and what you would see in your donor database. At the end of data collection, Reeher will validate that the data and numbers that Class Agent would report match your internal reporting in the form of dollars and donors and identify your breakdown of entities by relationship type. To best organize the work and timeline, the data files found in the Data Request Guide are broken by priority groups. The priority 1 files will contain all of the information for the validation process. We can proceed to the next phase, while your group continues to complete the priority 2 and 3 files.
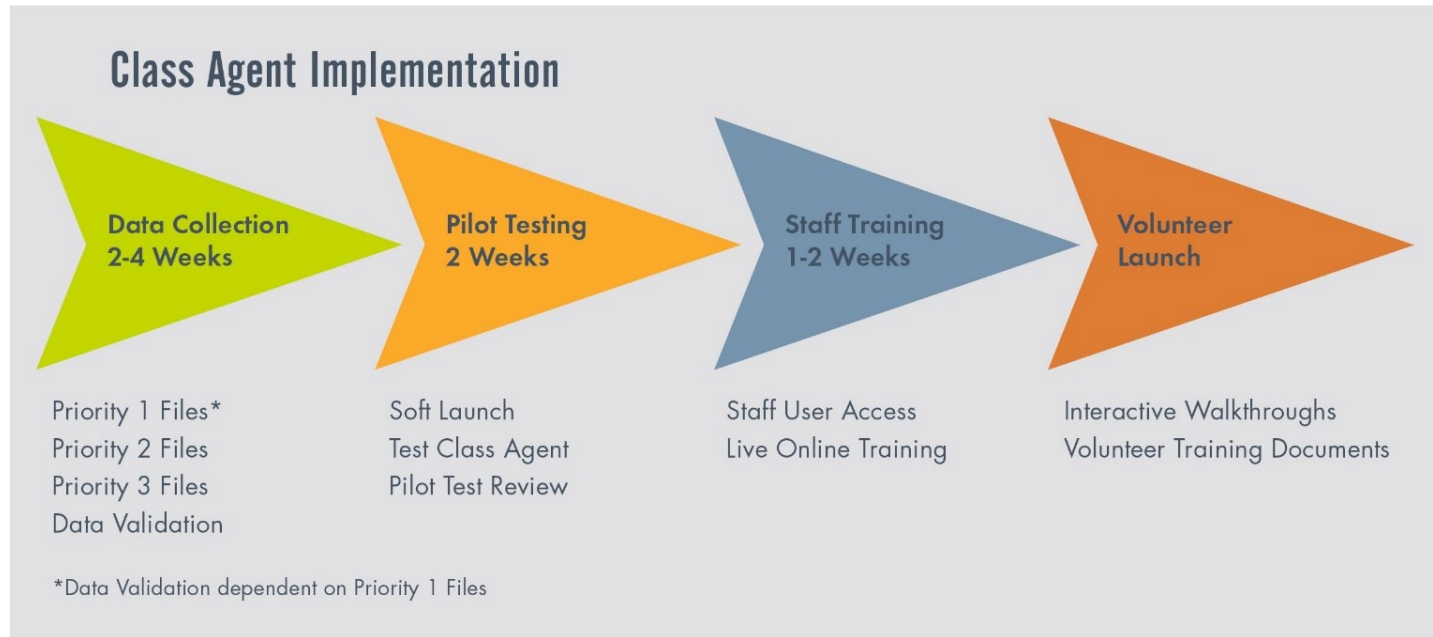
2nd phase Pilot Testing – This phase begins with a soft-launch meeting where we'll show you Class Agent with your data incorporated, and walk you through how to set up a campaign. You will have an opportunity to conduct live testing of Class Agent with a small select group of key testers before Staff Training.

3rd phase Staff Training – This phase is where Staff Users will gain access to Class Agent. To assist in training Staff, Reeher will provide live online training to assist in adoption of Class Agent.

4th phase Volunteer Launch – Your institution will now be ready to launch Class Agent to all volunteers. Interactive walkthroughs, volunteer training documents, and continued support from our Customer Care Team will be available at this point forward to your institution.

What is the typical target timeline for a Reeher Implementation?

Most subscribing institutions – whether implementing the entire Reeher Platform, the Annual Fund Platform, the Major Giving Platform, or Class Agent – are up-and-running within eight weeks. The typical eight week timeline is outlined as follows:

Class Agent Implementation

Data Collection
2-4 Weeks

Priority 1 Files*
Priority 2 Files
Priority 3 Files
Data Validation

Pilot Testing
2 Weeks

Soft Launch
Test Class Agent
Pilot Test Review

Staff Training
1-2 Weeks

Staff User Access
Live Online Training

Volunteer
Launch

Interactive Walkthroughs
Volunteer Training Documents

*Data Validation dependent on Priority 1 Files

Does implementing Reeher require a large-scale database conversion or special staffing?

Class Agent is a web-based software-as-a-service solution that works with any donor database and provides tools, metrics, reports, and business intelligence to help advancement organizations work more efficiently and effectively. As such, implementing with Reeher does not require a large-scale system replacement or database conversion. Product enhancements and updates are managed for you and provided as part of your subscription. Class Agent is accessed via a web browser and is curated specifically for higher education based on our deep expertise and continuous feedback from members of the Reeher Community.

An institution's primary tasks are to establish the nightly feed to supply Reeher with up-to-date fundraising information from your institution's donor management system(s) (see the Reeher Data Request Guide) and to validate data translations. With Reeher there is no software to install or maintain, nor is there the need to have special staff or consultants to establish connectivity to Reeher.

During my initial implementation, what files should I work on first?

During an institution's initial implementation of Class Agent, to best organize the work and timeline, the data files found in the Data Request Guide are broken down by the following priority groups. The Priority 1 Files will help Reeher with validating your dollars and donor count along with looking at all of your constituents. This will also give you time to work on the remaining Priority 2 and 3 files while we continue with the implementation project.

Files by priority group:

Priority 1 Files	Priority 2 Files	Priority 3 files
File 1.1: Entity	File 3.2: Staff Information	File 1.7: Athletics
File 2.1: Donor Transaction History	File 3.3: Prospect Entity	File 1.8: Associated Entities
File 1.2a: Addresses	File 3.5: Assignment History	File 4.2: Customer Specific Codes
File 1.3: Degrees		File 4.3: Social Media Links
File 1.5a: Participation History		
File 1.6: Contact Restrictions		
File 4.1: Code Translation Table		

File specific questions begin on next page

File 1.1: Entity

Which entities should I include? Should I include all entities, or only entities I solicit?
Include all entities, regardless of relationship type, relationship status, or whether or not you solicit them. This includes both persons and non-persons entities. We will work with you to determine which entities are active, but all entities, including those who are deceased and inactive, are necessary for accurate historical reporting.

Where should I provide names for corporations and other non-persons?
Include names for corporation, foundations, etc. in the first name field.

Can I include non-person entities in a separate file?
Yes, non-person entities can be included in a separate file. Use the same file format for both files, and name them with the file name plus a letter and a short description, such as "Entity_a_Persons" and "Entity_b_NonPersons".

What is Primary Relationship Type? I have a constituent with multiple Relationship Types, how will Reeher know all of them?
In the Entity file, we request Primary Relationship Type. An entity can only have one primary relationship type, so you need to choose a hierarchy to choose the primary relationship type for entities with multiple relationship types.

Where does this data show up in Class Agent?
Most of this data in this file is biographical information that is displayed on the constituent's Relationship Profile in the Management Dashboard (see Appendix: Relationship Profile), and you can customize which of these fields will be displayed to Agents in the Volunteer Portal.

File 1.2a: Addresses

How many addresses can I provide?
You can provide as many addresses as you have for the entity, but they should all be valid addresses (do not include previous addresses, inactive, former, or invalid addresses).

Should I include postal codes for international addresses?
Yes, you can include postal codes for international addresses in the Zip field.

Does Reeher prefer the Zip Code or Zip Code with the Zip+4 for an address?
Reeher prefers the Zip Code with the Zip+4, if it is available, for an entity's address (i.e. 91234-8765), but Reeher will also accept standard Zip Codes (i.e. 90210).

I have additional phone numbers not associated with an address that I want to include, how should I send those numbers?
First, remember that in the Entity file, Reeher request the Mobile Phone number of the constituent so maybe those numbers are already included as that field. If you have other phone numbers that you want included, Reeher recommends sending the data as an additional line in the Addresses file in which the Entity ID, Phone, Address Type, Primary Home Indicator, Primary Business Indicator, and Preferred Indicator fields are all populated, but the others (City, etc.) are blank.

Where does this show up in Class Agent?
Address information is shown in each constituent's Relationship Profile. Volunteers will only have access to address information for the constituents to whom they are assigned.

File 1.3: Degrees

I have some degree information for parents and friends that graduated from other institutions. Should I include this information?
Do not include degree information from other institutions. Only include degree information from your institution.

How do I include constituents with double majors or multiple degree years?
You can include this by sending multiple rows per entity as seen in the examples below.

Example 1: Alumni with a double major in the same degree year.

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
12345	BUS	1989	BS	BUSN
12345	AS	1989	BS	ECON

Example 2: Alumni with three degrees in different years.

Entity ID	School of Graduation	Degree Year	Degree of Graduation	Major
67890	AS	1989	BA	PHIL
67890	AS	1993	MA	PHIL
67890	AS	1997	PHD	PHIL

Where does this show up in Class Agent?
School and Degree information is shown on each constituent's Relationship Profile. We also summarize giving data by segment in the Volunteer Portal. For example, if your campaign is segmented by class year, you can allow Agents to access aggregate giving data by class year.

File 1.5a: Participation History

What types of participations can I include in this file?
This file is very broad and can include any type of participation. Some common types include events, student clubs and activities, Greek organizations, alumni associations, intramural athletics, volunteering, committees, boards etc. We request the Participation Category to differentiate the different types of participations.

I track different participation information in different systems or parts of my database. Can I provide more than one Participation History file?
Yes, you can provide more than one Participation History file if that is more convenient for you. Use the same format for both files, and name them with the file name plus a letter and a short description, such as "ParticipationHistory_a_Events" and "ParticipationHistory_b_Clubs".

Where does this show up in Class Agent?
All of a constituent's participations are shown in their Relationship Profile. If dates are provided on the activities, participations also appear on the timeline on a Relationship Profile.

File 1.6: Contact Restrictions

Where does this show up in Class Agent?
You can exclude constituents from volunteer prospect lists based on contact restrictions. For example, you could exclude all constituents from your campaign that have a contact restriction of "No Contact Whatsoever" or "Do Not Mail", etc. Also, Contact Restriction information is displayed on the constituent's Relationship Profile.

File 1.7: Athletics

Should I include intramural athletic activities?
Intramural athletic participation should be included in the Participation History file. The Athletics file should include only NCAA athletics or the intercollegiate equivalent thereof if the institution competes in a different collegiate level.

Where does this data show up in Class Agent?
Athletic activities are shown on the constituent's Relationship Profile (see Appendix: Relationship Profile). Athletics data can also be used as a way to segment campaigns.

File 1.8: Associated Entities

Is this file required?
This is an optional file.

What is an associated entity?
The Associated Entities file is intended to include any and all associations between your constituents, including spouses, parents, children, siblings, aunts, uncles, co-workers, employees, employers, former roommates, and any other professional connections or social connections, etc. The file and the data shows who is related/connected to whom within your database.

I have an Associated Entity record where the Entity is a constituent in our database, but the Associated Entity is not a constituent so I know their name and their Associated Relationship Type, but they do not have an ID in our database, is that ok to send to Reeher?
Yes, Reeher would still want you to send that Associated Entity record. If you do not have the Associated Entity ID of an associated entity, you can simply leave the Associated Entity ID field blank or null for that particular record, and supply the constituent's Entity ID, the associated person's Associated Name, Associated Relationship Type, and if applicable School of Graduation and Class Year. This happens frequently with children, parents, or grandparents of constituents.

Where does this data show up in the Platform?
When viewing a constituent's Relationship Profile, the Relationship Network section shows the constituent's Spouse, Parents, Children, and all other entities related to that constituent. If the Associated Entity ID was provided and matches a record in the Entity file, the displayed Associated Name will be a hyperlink that allows the user to click through to the Associated Entity's own Relationship Profile. If an Associated Entity ID is not provided, the name will still appear but not as a linking hyperlink.

*Note: the following examples are provided for illustration only. Some fields show descriptions, even though codes are preferred in the file.

Example 1: John Smith (Entity ID 1111) is the parent of Mary Smith (Entity ID 2222). And Mary Smith is the child of John Smith. John Smith did not graduate from your institution, but Mary Smith graduated from the School of Business with the Class Year of 2010.

Entity ID	Associated Entity ID	Associated Name	Associated Relationship Type	School of Graduation	Class Year
2222	1111	John Smith	Parent		
1111	2222	Mary Smith	Child	School of Business	2010

Example 2: Adam Jones (Entity ID 3333) is the Brother of Beth Jones (Entity ID 4444). And Beth Jones is the Sister of Adam Jones. Adam Jones graduated from the College of Arts and Sciences at your institution in 2006, Beth Jones graduated from the School of Medicine with the Class Year of 1999.

Entity ID	Associated Entity ID	Associated Name	Associated Relationship Type	School of Graduation	Class Year
4444	3333	Adam Jones	Brother	College of Arts and Sciences	2006
3333	4444	Beth Jones	Sister	School of Medicine	1999

File 2.1: Donor Transaction History

Which transactions should I include?
Include all available transactions regardless of whether the individual is active or deceased, and regardless of whether the transaction is hard credit or soft credit. You should include your entire history of transactions and not limit to only recent transactions, as the complete history is needed for calculations such as lifetime giving and determining who has never donated.

Can I include this information in more than one file?
Yes, you can split up the files however you like. Many institutions provide gifts and pledges in separate files, or include hard credits and soft credits in separate files. If splitting the files, use the same file format in all files, and name them with the file name plus a letter and a short description, such as "DonorTransactionHistory_a_Gifts" and "DonorTransactionHistory_b_Pledges".

What is the difference between legal amount and credit amount?
The legal amount is the hard credit amount the entity received for the transaction. Either one entity can receive the full amount of the transaction as the legal amount or it can be split between entities associated with the transaction. The credit amount is the full amount of the transaction, whether hard or soft credit. All entities associated with the transaction should receive the full amount as their credit amount. Whenever counting aggregate dollars, Reeher uses the legal amount field so that we avoid double counting. When displaying and individual's giving information in Class Agent, Reeher uses credit amount. Whenever counting donors, we use the credit amount to see how much the donor was credited with. Please see the examples at the end of this section for more detail.

What is the cash indicator, and what types of transactions are considered cash? Are stocks considered cash?
The cash indicator is used to flag any transaction that is considered cash or a cash equivalent by your institution (i.e. outright gifts and pledge payments). Cash essentially includes everything except pledges. Since many institutions liquidate stocks or assets as soon as they come in, stock gifts or payments are often considered cash.

What is the commitment indicator?
The commitment indicator is used to flag transactions that involved someone making the decision to donate. These include outright gifts and pledges, but not pledge payments.

What is the fiscal year field?
The fiscal year field is used for the institution to specify the fiscal year that a particular transaction should be attributed to and therefore its dollars and donors counted in. For the vast majority of institutions and transactions, the fiscal year would and should correspond to or be based on the Transaction Date that the transaction was given. However for some institutions, a fiscal year may be different than the one tied to their Transaction Date, for any number of reasons. Another example may be a gift that the institution intends to attribute to a previous or future annual campaign year or reunion year. Please see the examples below for more detail.

*Note: the following examples are provided for illustration only. They do not include all fields requested for this file, and some fields show descriptions, even though codes are preferred in the file.

Example 1: Bob Smith pledges a series of multiyear pledge transactions for $5000 for each of the next 3 years on 12/10/2012 (based on the date timeframe, technically FY2013), but the institution wishes to have one pledge counted in fiscal year 2014, another one in 2015, and another in 2016 instead, they are can specify on each of Bob's pledge transactions the Fiscal Year they wish to attribute it to.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Commitment Indicator	Pledge Indicator	Fiscal Year
Bob Smith	5000	5000	12/10/2012	Pledge	1	1	2014
Bob Smith	5000	5000	12/10/2012	Pledge	1	1	2015
Bob Smith	5000	5000	12/10/2012	Pledge	1	1	2016

Example 2: Sam Smith makes an annual fund gift of $100 on 5/20/2014 that his institution attributes to the Annual Fund's 2013 Campaign. So Sam's transaction has the Fiscal Year be 2013, instead of the typical timeframe based 2014 fiscal year.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Cash Indicator	Commitment Indicator	Fiscal Year
Sam Smith	100	100	5/20/2014	Gift	1	1	2013

Example 3: Adam Smith makes a gift of $300 on 5/23/2015. His employer Coca-Cola provides a matching gift of $300 but it does not come in until 8/15/2015. The institution would still like Coca-Cola's gift to count toward fiscal year 2015, even though it came in after the fiscal year ended. Adam receives the full legal and credit amount for his original gift and is attributed to fiscal year 2015.Coca-Cola receives full legal and credit amount for the matching gift and it is attributed to 2015 as well. Adam also receives the credit amount for the matching gift attributed to 2015 also.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Cash Indicator	Commitment Indicator	Fiscal Year
Adam Smith	300	300	5/23/2015	Gift	1	1	2015
Coca-Cola	300	300	8/15/2015	Matching Gift	1	1	2015
Adam Smith	0	300	8/15/2015	Matching Gift	1	1	2015

What is the donor indicator field?

The donor indictor field is used to indicate that the entity on the transaction is counted as a donor for this specific transaction for the institution. Typically Reeher counts a donor as any entity with a credit amount greater than $0 for the transaction. However, if based on your business rules and internal donor counting procedures your institution limits who counts as a donor for certain transactions or situations (e.g. third party gifts, payments on personal pledges made by a foundation, spousal credits, etc.), you can specify using the donor indicator if that entity should or should not be counted as a donor for that transaction.

Where does this data show up in Class Agent?

We display transaction history and analytics for each constituent on their Relationship Profile (see Appendix: Relationship Profile). You can customize how much giving data (if any) you wish to display to Agents. You can choose to display recent giving for prospects and assignments in the Volunteer Portal. We also summarize giving data by segment in the Volunteer Portal. For example, if your campaign is segmented by class year, you can allow Agents to access aggregate giving data by class year.

*Note: the following examples are provided for illustration only. They do not include all fields requested for this file, and some fields show descriptions, even though codes are preferred in the file.

Example 1: John Smith makes a Pledge of $1,000 to the annual fund on July 12, 2010. On December 31, 2010 John pays $500 of the pledge. John's wife, Sally, is also credited with the transactions. John receives the full legal amount for both the pledge and the pledge payment, and both John and Sally receive the full credit amount. The pledge is marked as a commitment transaction and the pledge payment is marked as a cash transaction.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
John Smith	1000	1000	7/12/2010	Pledge	1	0	1
Sally Smith	0	1000	7/12/2010	Pledge	1	0	1
John Smith	500	500	12/31/2010	Pledge Payment	1	1	0
Sally Smith	0	500	12/31/2010	Pledge Payment	1	1	0

Example 2: The Smith Foundation gives $5,000 to the Smith Scholarship Fund. John and Sally Smith are the individuals associated with the foundation. The Smith Foundation receives the full legal amount and credit amount for the gift, while John and Sally receive the full credit amount for the gift. The gift is marked as both a cash transaction and a commitment transaction.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
Smith Foundation	5000	5000	8/19/2010	Gift	0	1	1
John Smith	0	5000	8/19/2010	Gift	0	1	1
Sally Smith	0	5000	8/19/2010	Gift	0	1	1

Example 3: Adam Smith makes an annual fund gift of $300. Coca-Cola provides a matching gift of $300. Adam receives the full legal and credit amount for his gift, and Coca-Cola receives full legal and credit amount for the matching gift. Adam also receives the credit amount for the matching gift.

Entity	Legal Amount	Credit Amount	Transaction Date	Transaction Type	Annual Fund Indicator	Cash Indicator	Commitment Indicator
Adam Smith	300	300	6/23/2010	Gift	1	1	1
Coca-Cola	300	300	6/23/2010	Matching Gift	1	1	1
Adam Smith	0	300	6/23/2010	Matching Gift	1	1	1

File 3.2: Staff Information

Where does this show up in Class Agent?
This file is used to define the Staff IDs used in your Assignment History file. We also allow you to assign a staff ID to a user, so that they can see information in the dashboards relating to them. In order to assign a user a staff ID in Class Agent, it must exist in this file.

File 3.3: Prospect Entity

What is the difference between prospect ID and entity ID? What if my database does not have separate Prospect ID records?
In some donor management systems a prospect record is used to associate one or many constituent records together. Officers are then assigned to the prospect record rather than assigning them to each constituent record. For example, a prospect record could be created for a husband, a wife, and their foundation. The record would have a single prospect ID, and each of the entities would have a different entity ID. Generally, Advance is the only system that supports this, so if your system does not support this you do not need to supply this file. Anywhere you see Prospect ID in the other files, just use the same ID you use for Entity ID.

Where does this show up in Class Agent?
This file is used to link prospect IDs to entity IDs, so that information linked to prospects, like assignments, can also be linked to the entities in the prospect record. You can view the related prospects that are tied to an entity on a constituent's Relationship Profile.

File 3.5: Assignment History

Why is the assignment type field important?
The assignment type is used to distinguish primary gift officers from non-primary or secondary gift officers and volunteers. We will map each assignment type to one of the following values for reporting purposes: Primary, Non-Primary, and Volunteer. On a constituent level, assignment type allows the user to see when looking at a record which staff member is their Primary officer, Non-Primary officer, or Volunteer manager.

Where does this show up in Class Agent?
You can see a constituent's assigned officer(s) in their Relationship Profile. You can also restrict constituents who are assigned to gift officers from being assigned to Class Agents.

File 4.1: Code Translation Table

I am sending many of my fields in the other Reeher files as codes, how should I send the translations/definitions of those codes so that Reeher knows what each code stands for?
We have a number of starred fields throughout the Reeher Data Request Guide, which indicates that we prefer codes for that field. You then use the Code Translation Table file to define the codes for Reeher. To identify for Reeher what file and what field each code corresponds to, Reeher requests that you specify for each code the File Name (Entity, Degrees, Participation History, etc.) and the Field Name (Marital Status, Major, Assignment Type, etc.). Reeher also asks that you supply the code used for the field in the Customer Code column and the translation/description of what that code means in the Customer Definition column.

*Note: the following sample format/layout examples are provided for illustration only.

File Name	Field Name	Customer Code	Customer Definition
Entity	Marital Status	M	Married
Entity	Marital Status	S	Single
Entity	Marital Status	D	Divorced
Entity	Marital Status	W	Widowed
Entity	Primary Relationship Type	AL	Alumni
Entity	Primary Relationship Type	CF	Corporation/Foundation
Entity	Primary Relationship Type	FR	Friend
Entity	Primary Relationship Type	PA	Parent
Degrees	School of Graduation	BUS	School of Business
Degrees	School of Graduation	EDU	School of Education
Degrees	School of Graduation	LAW	School of Law

Where does this show up in Class Agent?
We have a number of starred fields throughout the data request guide, which indicates that we prefer codes for that field. You then use this file to define the codes.
In Class Agent, we will display the descriptions that are provided in this file, rather than the codes that are provided in the other files.

File 4.2: Customer Specific Codes

How many custom fields can we send?
Two custom fields are included with your subscription. If you wish to display more custom fields, there will be an additional fee.

Where does this show up in Class Agent?
This file allows you to send custom ratings, scores, codes, values or appends (either internal or third party) to be loaded into the Class Agent. We will then create a field that will allow you to add or hide this set of data from volunteers to use during solicitations. You can also segment Class Agent campaigns based on any of these custom fields.

File 4.3: Social Media Links

Is this file required?
This is an optional file.

Who will be able to see the links?
Class Agent volunteers will only be able to see links to Facebook; staff will be able to see all three links, if provided.

Appendix: Relationship Profile

James "Jim" Stockslager

Title: Project Manager	Entity ID: 25041	Gender: M	**Relationship Network** 2
Employer: Best Buy	Primary Relationship Type: Alumni	Age: 63 (12/30/1952)	Spouse: Mary Stockslager
Preferred Email: james.stockslager@reeh...	Relationship Status: Active	Marital Status: Married	Parents: N/A
			Children: N/A

Detail	Donor Analytics	Donor Discovery	Timeline	Activities (7)	Proposals (5)	Attachments (7)

∨ Detail

Degrees and Affiliations:

Preferred Class Year:	1976
Degrees:	- School of Business - Business: Bachelor 1976
Relationship Type(s):	Alumni
Athletics:	N/A
Participations:	Alumni Affairs Committee Alumni Network Volunteer View Details (2)

Contact Information: See All Addresses (4)

Preferred Mailing Name:	James Stockslager
Home Address: (preferred)	901 PO BOX Marion , FL 34421 📍 Map 🏠 Zillow
Business Address:	Best Buy 328 Sunflower Pkwy Hollywood FL, 33021 📍 Map
Home Phone:	(123)-456-7890
Work Phone:	(123)-456-7890
Mobile Phone:	(123)-456-7890
Contact Restrictions:	N/A

Prospect Information:

Major Giving EVI:	
Annual Giving EVI:	
Annual Giving EV:	
Annual Fund PDI:	
Net Worth:	
Wealth Capacity Rating:	
Demonstrated Philanthropy Rating:	
Prospect Rating:	
Prospect Classification:	
Prospect Stage:	
Related Prospects:	Mary Stockslager, Mary Stockslager
Assigned Officer(s):	**Richard Thiem**
Assigned Volunteer(s):	**Rebecca Austin**
Affinity Cluster:	

∨ Donor Analytics

Donation History

Total Commitments:	$144,751.25 view details
Total Cash Giving:	$144,751.25 view details
Total AF Cash Giving:	$114,751.25 view details
Fiscal Years of Giving:	32
Consecutive Years of Giving:	22
First Year of Donation:	1982
Last Cash Gift:	$7,500.00 , 05/18/2016 , Phil and Ted's Undergraduate Research Fund

Trailing 10 Years Giving History

◉ Commitment ○ Cash ○ AF Cash
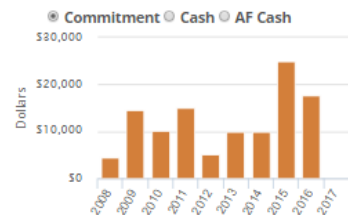
Designation of Giving

Designation	Designation School/Unit	Cash Giving ▼
Phil and Ted's Undergraduate Research Fund	School of Business	$96,500.00
Pete Seymour Scholarship Fund	Unspecified	$28,751.25
Hecker Training Center in Memory	School of Arts and Sciences	$16,500.00
	Total	**$144,751.25**

Appendix: Relationship Profile

James "Jim" Stockslager

Title: Project Manager	Entity ID: 25041	Gender: M	**Relationship Network** 2
Employer: Best Buy	Primary Relationship Type: Alumni	Age: 63 (12/30/1952)	Spouse: Mary Stockslager
Preferred Email:	Relationship Status: Active	Marital Status: Married	Parents: N/A
james.stockslager@reeh...			Children: N/A

Detail	Donor Analytics	Donor Discovery	Timeline	Activities (7)	Proposals (5)	Attachments (7)

⌄ Timeline

Appendix: Class Agent – Campaign Overview

Western Fund FY17 🔴1

07/01/2016 - 06/30/2017 (184 days remaining)

All Managers (Other Segments included)
All Segments

<div>
64 segments selected ▾
</div>

Managers 👥	Agents 👥	Assignments 📋	Activity ◎	Results $
6	182	1382	706	$2,090,292

Add agents who will be soliciting on behalf of the Preferred Class Year you are managing.

Entity ID, Name

Agents

Search   ✉ New Notification ▾   **Activate All Agents**

Entity ID ⬍	First Name ⬍	Last Name ⬍	Email	Preferred Class Year ⬍	Status	Assignments ⬍	Actions
145305	👥 John	Albers	john.albers2@yahoo.com ☑	1971 ☑	Activate	1	▶ Simulate ⊗ Remove
44540	👥 Jeffrey	Belser	j.belser@gmail.com ☑	1979 ☑	Activate	9	▶ Simulate ⊗ Remove
26200	Michael	Bayne	michael.bayne@ace.com ☑	1977 ☑	Activate	5	▶ Simulate ⊗ Remove
23808	Catherine	Woodard	cwoodard@bestbuy.com ☑	1975 ☑	Activate	6	▶ Simulate ⊗ Remove
3754062	Carolyn	Aichele	carolyn.aichele@reeher.info ☑	1997 ☑	Activate	7	▶ Simulate ⊗ Remove

Appendix: Class Agent – Class Agent View