CLASS AGENT FUNDRAISING
DATA REQUEST GUIDE
VERSION 2017.4

(CHANGES FROM PREVIOUS DATA REQUEST GUIDE VERSION 6.0)
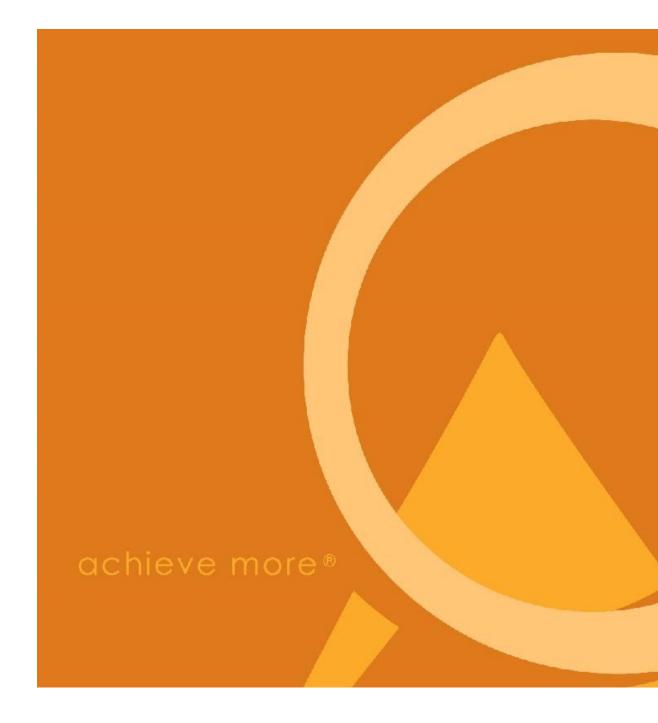
CLASS AGENT
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Overview

The Class Agent Fundraising Data Request Guide is designed by Reeher to provide you with guidelines for setting up your institution's nightly data feed. We understand that your institution may not track all requested fields, or may track some information differently than outlined in this document. Please contact Reeher Support if you would like to discuss alternative methods for extracting the data.

Automated Nightly File Transfer
As part of setting up Class Agent Fundraising, a nightly data feed will be set up to supply the application with up-to-date fundraising information from your institution's donor management system(s). This process involves two steps.

1. The nightly extract is set up by creating a number of queries or exports to pull the information into text files from your institution's system. This includes exporting the full files each night, and not only updates.
2. These files will be scheduled to automatically transfer to Reeher's server via SFTP (Secure File Transfer Protocol) each night. Typically, files are transferred between 10 pm and 1 am central time. You just need to provide the IP address of the machine that will transfer the files, and Reeher will provide a username and password for you to access your institution's folder on the server. Reeher also supports the use of SSH keys, or public keys, as a means of authentication for the SFTP.

This process is straightforward and our Customer Care team will help to establish this process if you do not have something currently in place.

File Format
Reeher requests that each file be prepared in a tab delimited text file. Comma separated values (csv) format is also acceptable. All files should include column headers. If you are using the csv format, use double quote enclosures for any fields containing commas.

Naming Conventions
Please title the files with the appropriate name corresponding to this document. For example, the entity file should be named "Entity" and should not include a date stamp or other information that would change the naming of the file on a daily basis. If splitting a file into multiple files, please name the files by adding a letter and short description (i.e. Entity_a_Persons, Entity_b_NonPersons, etc.).

File Priorities in Implementation
During an institution's initial implementation of Class Agent Fundraising, to best organize the work and manage the timeline, the data files found in this Data Request Guide are broken down by the following priority groups. The Priority 1 Files will help Reeher with validating your dollar and donor counts 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 1.1: Entity <mark>*(new field added)*</mark>

All relationships that are tracked in your system should be provided in the Entity file regardless of relationship type, relationship status, or whether or not you solicit them.

Each individual entity should appear in only one row within the file.

Number	Name	Description	Preferred Format
1	Entity ID	Unique ID of the entity	string/text
2	First Name	Entity's first name if person, or organization name if non-person	string/text
3	Middle Name		string/text
4	Last Name		string/text
5	Preferred Email		string/text
6	Birth Date		MM/dd/yyyy
7	Marital Status*		string/text
8	Nickname		string/text
9	Prefix	i.e. Mr., Mrs., Dr., etc.	string/text
10	Suffix	i.e. M.D., Ph.D., etc.	string/text
11	Preferred Mailing Name	Preferred mailing address name of the individual entity	string/text
12	Job Title		string/text
13	Employer		string/text
14	Relationship Status*	i.e. active, inactive, deceased, lost, etc.	string/text
15	Primary Relationship Type*	i.e. alumni, friend, parent, etc.	string/text
16	Preferred Class Year		yyyy
17	Gender*		string/text
18	Spouse Name	Spouse's full name including any Prefix and/or Suffix	string/text
19	Spouse ID	Spouse's entity ID	string/text
20	Married Alumni Indicator	Indicator that entity's spouse is an alumnus/a	1=Yes, 0=No
21	Maiden Name	Maiden Name of the Entity	string/text
22	Ethnicity*		string/text
23	Occupation*	i.e. Educator, Administrative Support, Attorney/Counsel	string/text
24	Industry*	i.e. Manufacturing, Finance, Education	string/text
25	Mobile Phone		string/text
26	Preferred Joint Mailing Name	Preferred household mailing address name	string/text
27	Primary Entity ID	Entity ID of the primary entity between the entity and the spouse. If not available, Reeher will use lowest Entity ID between the entity's Entity ID and the Spouse ID as Primary Entity ID.	string/text
28	Annual Fund Ask Amount	The amount that an entity is rated for the Annual Fund as an Annual Fund Ask Amount	string/text
<mark>29</mark>	<mark>Planned Giving Indicator</mark>	<mark>Indicators that the constituent has a planned gift</mark>	<mark>1=Yes, 0=No</mark>

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

File 1.2a: Addresses *(updated file name)*

The Addresses file provides all active addresses for each constituent, and identifies which address is their primary home, which address is their primary business, and which address is their preferred. Only valid addresses should be included in the file (do not include previous addresses or invalid addresses).

The file can contain multiple rows per entity for each active address associated with the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Address Line 1		string/text
3	Address Line 2		string/text
4	Address Line 3		string/text
5	City		string/text
6	State		string/text
7	Zip Code	Zip Code (with Zip+4, if available, for the entity's address (i.e. 91234-8765))	string/text
8	Country		string/text
9	Phone	The phone number associated with the address (if applicable)	string/text
10	Address Type*	i.e. Home, Business, Seasonal, etc.	string/text
11	Primary Home Indicator	Indicates the address is the entity's primary home address. A maximum of one address per entity should be indicated as primary home. The indicated address will show up in the constituent's Relationship Profile as their primary home address.	1=Yes, 0=No
12	Primary Business Indicator	Indicates the address is the entity's primary business address. A maximum of one address per entity should be indicated as primary business. The indicated address will show up in the constituent's Relationship Profile as their primary business address.	1=Yes, 0=No
13	Preferred Indicator	Indicates the address is the entity's preferred address. A maximum of one address per entity should be indicated as preferred. The indicated address will show up in the Platform as the constituent's preferred address.	1=Yes, 0=No

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

<mark>File 1.5a</mark>: Participation History *(updated file name)*

The Participation History file contains all categories of entity involvement with your institution. Examples would include committees, events, volunteering, traveling, undergraduate activities if available, Greek organizations, alumni associations, intramural athletics, boards, etc.

The file should contain multiple rows per entity corresponding to each participation activity of the entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Participation Category*	i.e. Event, Committee, Clubs, Volunteer, etc.	string/text
3	Activity Name*	i.e. President's Dinner, Alumni Association Committee,	string/text
4	Activity Role*	i.e. Chair, Attendee, President, etc.	string/text
5	Activity Status*	i.e. Active, Inactive, Current, Former, etc.	string/text
6	Start Date	Date the activity started	MM/dd/yyyy
7	Stop Date	Date the activity ended	MM/dd/yyyy

(*) indicates codes are preferred for the field, and that the code definitions should be provided in the Code Translation Table

File 1.8: Associated Entities *(file noted as an optional file)*

The Associated Entities file is an optional file; it should provide us with all associations between your constituents, including spouses, parents, children, siblings, co-workers, etc.

The file should contain one row for each constituent related to the entity, and can contain more than one row per entity.

Number	Name	Description	Preferred Format
1	Entity ID	ID that corresponds with the Entity ID in the Entity file	string/text
2	Associated Entity ID		string/text
3	Associated Name	Name of the associated entity	string/text
4	Associated Relationship Type*	i.e. spouse, parent, child, sibling, co-worker, etc. Explains how the Associated Entity is related to the Entity, as opposed to how the Entity is related to the Associated Entity. For example, if the type is "Parent", this would indicate that the Associated Entity is a Parent of the Entity.	string/text
5	School of Graduation*	School of graduation of the associated entity, if available	string/text
6	Class Year	Class Year of the associated entity, if available	yyyy

The * indicates codes are preferred and should be included in the code translation file

File 4.3: Social Media Links <mark>*(new file)*</mark>

The Social Media Links file is an optional file; it provides links to social media sites (Facebook, Twitter, and LinkedIn) for each constituent.

Note: Class Agent volunteers will only be able to see links to Facebook; staff will be able to see all three links, if provided.

Each individual entity should appear in only one row within the file.

Number	Name	Description	Preferred Format
1	Entity ID		string/text
2	Facebook	Full link to this social media site formatted as http://...	string/text
3	Twitter	Full link to this social media site formatted as http://...	string/text
4	LinkedIn	Full link to this social media site formatted as http://...	string/text