

REEHER PLATFORM
CLASS AGENT
FUNDRAISING FILE
EXPORT GUIDE
VERSION 2017.4



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Overview

The Reeher Platform's Class Agent Fundraising File Export Guide is designed to provide you information on the output files created for you by Reeher as a part of your Class Agent Fundraising subscription.

Nightly File Export

As a part of your subscription to Class Agent Fundraising, Reeher provides you with the volunteer assignment and contact data entered by your staff and volunteers through Class Agent Fundraising. This data is refreshed each night, and always contains all data entered for your institution, as opposed to only containing the daily updates. The file is exported to your institution's SFTP site to the download folder, as opposed to the upload folder which is the location that your institution uploads its files for Reeher, and is updated at the same time that we process your nightly data files.

File Format

The files are exported as text files, and use a || delimiter.

Naming Conventions

The exported files are named class_agent_assignments_2017_4.txt, class_agent_contacts_2017_4.txt, class_agent_notes_2017_4.txt, and class_agent_update_request_2017_4.txt.

File 1: Class Agent Assignments

This file contains all agents and assignments entered by your users and volunteers in the Class Agent Fundraising. Agents and assignments can show up multiple times in the file if they are in more than one campaign.

Number	Name	Description	Format
1	Volunteer Entity ID	Entity ID of the volunteer	string/text
2	Assignee Entity ID	Entity ID of the assignee	string/text
3	Complete Indicator	Y = Complete, N = Not Complete	Y/N
4	Complete State	Details on the complete state for complete assignments (ex. thank you sent, unable to contact, won't donate, etc.)	string/text
5	Campaign Name	Name of the campaign for the volunteer/assignments	string/text
6	Campaign Start Date	Start date of the campaign	mm/dd/yyyy
7	Campaign Stop Date	Stop date of the campaign	mm/dd/yyyy
8	Segment	The segment of the campaign the volunteer/assignment are a part of, usually their preferred class year but could also be a certain affinity based segment depending on how the campaign is set up	string/text
9	Manager Name	Name of the volunteer's manager at your institution	string/text

File 2: Class Agent Contacts

This file contains all contacts/results entered by your volunteers in Class Agent Fundraising.

Number	Name	Description	Format
1	Contact ID	Unique ID of the contact record	integer
2	Contact Type	Type of contact (ex. phone, email, text, thank you)	string/text
3	Volunteer Entity ID	Entity ID of the volunteer	string/text
4	Contact Entity ID	Entity ID of the person contacted	string/text
5	Contact Date	Date/time the contact report was filed	mm/dd/yyyy hh:mm:ss
6	Contact Notes	Any notes the volunteer left in the contact report	string/text
7	Donation Amount	Donation amount indicated by the volunteer in the contact report, if applicable	string/text
8	Donation Method	Donation method indicated by the volunteer, if applicable (ex. online, send pledge card, etc.)	string/text
9	Campaign Name	Name of the campaign the contact was a part of	string/text
10	Campaign Start Date	Start date of the campaign	mm/dd/yyyy
11	Campaign Stop Date	Stop date of the campaign	mm/dd/yyyy

File 3: Class Agent Notes

This file contains all notes associated with a specific entity submitted by volunteers in Class Agent Fundraising.

Number	Name	Description	Format
1	Note ID	Unique ID of the note record	integer
2	Volunteer Entity ID	Entity ID of the volunteer	string/text
3	Entity ID	Entity ID of the person to whom the note is related	string/text
4	Note Content	Note related to entity	string/text
5	Note Date	Date/time	mm/dd/yyyy hh:mm:ss
6	Campaign Name	Name of the campaign the note was a part of	string/text

File 4: Class Agent Data Update Request

This file contains the contents of forms submitted by volunteers regarding updated entity demographic information.

Number	Name	Description	Format
1	Update ID	Unique ID of update request	integer
2	Volunteer ID	Entity ID of the volunteer	string/text
3	Entity ID	Entity ID of the person whose information should be updated	string/text
4	Update Field	Field to be updated (email, phone, address, etc.)	string/text
5	Current Value	Current field value	string/text
6	New Value	New field value as recorded by volunteer	string/text
7	Notes		string/text
8	Date	Date/time request is submitted	mm/dd/yyyy hh:mm:ss
9	Campaign Name	Name of the campaign during which the update is requested	