Development Officer Assignments:

1. Log in to Reeher (www.reeher.net) and you will be on the Major Giving tab.

2. Click on Prospect Assignments on the left hand side of the page.

3. You can select which relationship types you want to see. Click Primary to see your primary managed prospects or click Non-Primary to see you’re affiliated and team assignments or click All to see them.

Next you can choose what you would like to see about your assigned prospects....
Something not to be confused by when looking at your portfolio:

- **Days Since Last Contact** means the last touch this prospect received ex. Phonathon call or mailing or could be a meeting
- **Last Visit Date** and **Last Visit Officer** will reflect the last recorded face to face meeting with the prospect and the development officer that recorded the visit.
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How to use Reeher to plan a trip:

- Trip Scenario: A development officer from CAFLS would like to make a trip to Florida to see any alumni who have a high net worth and a high EVI.

When you click on Create new query you will get a blank screen like this:

Click on Add Filters

Click on the tab Targeter

Select: Create New Query
Click on the arrow by Entity and select Relationship Type

Click on the arrow by School of Graduation and select School of Graduation

Click on the arrow by Reeher Predictive Scores and select MG EVI
Click on the arrow by Contact Information and select Home State

Click on the arrow by Consumer Variables and select Net Worth

Click on the arrow by Prospect Management and select Gift Officer Assignment

Click Submit
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When you click Submit your screen will look like this and you are ready to make further selections:

- Click Alumnus
- Click your College
- Click on desired EVI or range
- Click on desired Net Worth or range
- Click on assigned or unassigned
- Select State
- Click Show Results
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When you click Submit your screen will look like this with your results:

You can click on Add Columns and select the data you want to see.

Click on the entities ID and you will be able to view a snapshot of their history.

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To save time you will want to save the query so you can come back to it at any time and make adjustments according to where you will be travelling:

Whatever you name your query it will now show up as a choice under Select Query.
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After you have saved the query you can also export the results:

1. Click Export Results
2. Give your file a name
3. Select MS Excel or CSV
4. Click Download Now