



## Phillips Exeter Academy

### AgentSphere Business Rules

#### **Password:**

You will create your password upon signing into AgentSphere. If you forget your password, simply click the "Reset Password" button located on the main log-in page. Exeter Fund staff does not have the ability to see your password and cannot retrieve it.

**Constituents tab:** Contains a full list of solicitable classmates (excluding classmates who have requested not to be solicited by Exeter) with a snapshot of their donor status, pledge total, total given. This is also the screen where you have the ability to assign yourself as a fund raiser.

#### **Assignments**

To assign yourself as a solicitor, click the red arrow in the "Assigned To" column next to the name of the classmate to whom you would like to be assigned and then select your name from the list that appears. To remove yourself as solicitor, click the red "x" next to your name in the "Assigned To" column.

- Do not assign yourself or change assignments on classmates that have the letters "TP" listed in the "Top Prospect" column.
- If a (non-TP) classmate is already assigned to a fellow volunteer fundraiser, you may replace that fundraiser with your own name but please notify your colleague of the change in assignment.

**Constituent Detail View:** A detailed view of each classmate including family and giving history.

**Giving History-** shows Exeter Fund donations only, if a donor has a recurring gift the amount will reflect anticipated total for the current fiscal year

**Other Donations-** shows sum of all gifts to funds *other than* The Exeter Fund

#### **Important Roles/Solicit Codes**

Listed on each individual record are giving status, dorm, and any applicable mail rules

##### **Giving Status: reflects Exeter Fund giving only**

SGD: Since Grad Donor, has given to the Exeter Fund each year since graduation

Current: Has given this fiscal year

Lybunt: Gave in the prior year

Sybunt: Gave in the previous 5 years, but *not* last year

Occasional: Has given at some point since graduation but *not* in the past 5 years

Never: Has never given to Exeter

## **Mail Rules**

- NDA: No direct appeals– Has requested no solicitations by snail mail
- NEA: No electronic appeals – Has requested no solicitation by e-mail
- NEM: No electronic mail – Has requested no e-mail of any kind from Exeter
- NH: No home phone calls – Has requested not to be solicited at his/her home phone
- NP: No phone appeals – Has requested not to be solicited by phone
- NW: No work phone calls – Has requested not to be solicited at his/her work phone

***Record Activity:*** Where pledge information and notes are recorded

**Pledges:** Enter pledge information and any notes and an email will automatically send information to the Exeter Fund staff. This is the only selection that will automatically email the staff.

**\*\* Do Not Send any credit card information through AgentSphere.\*\***

Please call your Exeter Fund staff person to relay any credit card information.

**Will Not Give This Year:** Relay this information to the Exeter Fund staff by clicking the "email staff button". This selection does not automatically generate an email.

**Thinks Already Gave This Year:** Relay this information by clicking the "email staff button"

**Will Give an Unspecified Amount:** Relay this information by clicking the "email staff button"