

# TEMPLATE CAMPAIGN SPREADSHEETS

When you open the campaign spreadsheet, you will notice there are 4 separate sheets. There is a basic template, a detailed payroll template, and two samples. After looking at both samples, determine which template will work best for your company and then enter your information on just one template. If you use one of these spreadsheets to collect all of your donors and leadership information, you will not need to complete the handwritten leadership form.

## BASIC TEMPLATE

**Red (Name)** – Enter the name for each donor.

**Blue** – Enter the **total contribution amount** in the column that matches their payment type. Each donor will have a number in at least ONE blue column. If they are payroll deduction, this is **total** amount over the course of the year, not what is being deducted each paycheck (see detailed payroll template if you wish to enter that information).

**Red (Total Contribution)** – This column automatically adds all of the blue columns for each donor. If the amount is \$500 or greater, it will change color to indicate the donor is a leadership donor. **Yellow** is for Bayou Society (\$500-\$999), **Green** is for Steamboat Society (\$1,000-\$9,999), and **Purple** is for Tocqueville Society (\$10,000 and up). You will need to enter the leadership information for each of these donors.

**Yellow** – If they are a Leadership donor, indicate the leadership level (Bayou, Steamboat or Tocqueville) and their preferred name to be recognized in the annual Leadership Guide. If they indicate United 45 or a spouse include that information and a preferred combined name to be recognized in the Leadership Guide.

Your totals are for each column are displayed in the corresponding cell in Row 1 (i.e. the total for payroll deduction is right above the words payroll deduction in cell B1 and the grand total is above total contribution in cell G1).

	\$ 1,850.00	\$ 20.00	\$ 100.00	\$ 80.00	\$ -	\$2,050.00						
NAME	PAYROLL DEDUCTION	CASH	CHECK	CREDIT	DIRECT BILL	TOTAL CONTRIBUTION	LEADERSHIP	Preferred Recognition Name	UNITED 45	SPOUSE NAME	Combined Recognition Name	SPOUSE EMPLOYER
John Doe			\$ 100.00			\$ 100.00						
Amy Jones	\$ 650.00					\$ 650.00	Bayou	Amy Jones		Robert Jones	Bob & Amy Jones	Company A
Joe Smith		\$ 20.00				\$ 20.00						
Mary Smith				\$ 80.00		\$ 80.00						
Emily Thomas	\$ 1,200.00					\$ 1,200.00	Steamboat	Emily Thomas	x			

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## DETAILED PAYROLL TEMPLATE

**Red (Name)** – Enter the name for each donor.

**Blue** – Enter the contribution amount in the column that matches their payment type. Each donor will have a number in at least ONE blue column. If they are payroll deduction, enter the amount to be deducted per pay period in the column that matches their number of pay periods. Their total payroll deduction amount will calculate itself in the Payroll Deduction column. For cash, check, credit, and direct bill enter the **total contribution** amount.

**Red (Total Contribution)** – This column automatically adds all of the darker blue columns for each donor. If the amount is \$500 or greater, it will change color to indicate the donor is a leadership donor. **Yellow** is for Bayou Society (\$500-\$999), **Green** is for Steamboat Society (\$1,000-\$9,999), and **Purple** is for Tocqueville Society (\$10,000 and up). You will need to enter the leadership information for each of these donors.

**Yellow** – If they are a Leader, indicate the leadership level (Bayou, Steamboat or Tocqueville). If they indicate United 45 or a spouse include that information and a preferred name or names to be recognized in the Leadership Guide.

Your totals are for each column are displayed in the corresponding cell in Row 1 (i.e. the total for payroll deduction is right above the words payroll deduction in cell B1 and the grand total is above total contribution in cell K1).

	\$ 1,850.00	\$ -	\$ 25.00	\$ -	\$ 100.00	\$ 20.00	\$ 100.00	\$ 80.00	\$ -	\$ 2,050.00	
NAME	PAYROLL DEDUCTION	Weekly 52 Deductions	Biweekly 26 Deductions	Semi-Monthly 24 Deductions	Monthly 12 Deductions	CASH	CHECK	CREDIT	DIRECT BILL	TOTAL CONTRIBUTION	LEADERSHIP
John Doe							\$ 100.00			\$ 100.00	
Amy Jones	\$ 650.00		\$ 25.00							\$ 650.00	Bayou
Joe Smith						\$ 20.00				\$ 20.00	
Mary Smith								\$ 80.00		\$ 80.00	
Emily Thomas	\$ 1,200.00				\$ 100.00					\$ 1,200.00	Steamboat