

# United Way Campaign Spreadsheet Instructions

Use just **ONE** of the spreadsheets, either the **Basic Spreadsheet** or the **Payroll Details Spreadsheet**. The main difference between the two is that the **Payroll Details Spreadsheet** will calculate the total gift amount when you enter the amount per pay period.

If you use one of these spreadsheets to collect all your donors and leadership information, you will not need to complete the separate leadership form.

## BASIC SPREADSHEET

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

**Blue** – Enter the **total annual 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 they wish to be anonymous or if they list a spouse, include that information and a preferred combined name to be recognized in the Leadership Guide.

**Totals** 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).

**To Print:** Highlight and select the area that you wish to print. In the print settings, select “Print Selection’ and print in landscape orientation.

	\$ 1,870.00	\$ 20.00	\$ 100.00	\$ 80.00	\$ -	\$2,070.00						
NAME	PAYROLL DEDUCTION	CASH	CHECK	CREDIT	DIRECT BILL	TOTAL CONTRIBUTION	LEADERSHIP LEVEL	PREFERRED RECOGNITION NAME	CHECK IF ANONYMOUS	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			
Brian Young	\$ 20.00					\$ 20.00						

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## DETAILED PAYROLL SPREADSHEET

**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 light blue 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 annual 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 they wish to be anonymous or if they list a spouse, include that information and a preferred name or names to be recognized in the Leadership Guide.

**Totals** 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).

**To Print:** Highlight and select the area that you wish to print. In the print settings, select “Print Selection’ and print in landscape orientation.

	\$ 1,870.00	\$ -	\$ 25.00	\$ -	\$ 100.00	\$ 20.00	\$ 20.00	\$ 100.00	\$ 80.00	\$ -	\$ 2,070.00	
NAME	PAYROLL DEDUCTION	Weekly 52 Deductions	Biweekly 26 Deductions	Semi-Monthly 24 Deductions	Monthly 12 Deductions	One Time Deductions	CASH	CHECK	CREDIT	DIRECT BILL	TOTAL CONTRIBUTION	LEADERSHIP LEVEL
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
Brian Young	\$ 20.00					\$ 20.00					\$ 20.00	