

**Thank you for downloading this brochure for our Charity Fundraising Schedule.  
Take a look below to see what this software offers you.**

The Charity Fundraising Schedule gives you the following advantages:

**Have a comprehensive list of potential money donors**

**Track when last you have followed up with each person, and what they have given**

**Set targets for yourself or your fundraising personnel**

**Assign each person to a custom category, to help you better manage your contacts**

**See how you are doing against your target, after each entry**

**Create a report, as of the end of the previous month, with the click of a button**

**NOW INCLUDES CURRENCY SYMBOL OPTIONS & A DONOR REPORT**

**And more.. Take a look below for more details**

Input a few details like the starting date, the individual's name, and a default amount, if you require one. You can also set a target for each month if required, as well as assigning names for categories to later sort donors by. If you are managing a team of fundraisers, you can use this sheet as many times as required, just use the save as function to create a new document per person per year. You can hide the sheet with these details if you don't wish for them to view it.

|                         |  |   |                         |
|-------------------------|--|---|-------------------------|
| <b>Start Date:</b>      | <b>01 January 2016</b>   | <b>End Date:</b>  | <b>31 December 2016</b> |
| <b>Charity Name:</b>    | <b>Test Charity</b>  |   |                         |
| <b>Individual Name:</b> | <b>Mr Collector</b>  |   |                         |
| <b>Default Amount:</b>  | <b>£10.00</b>  |   |                         |
|                         | Fill this in if you wish to have a default giving amount. That will mean that any amount space cell left blank of an amount, will be valued at the figure above. Leave blank if no default amount. |   |                         |
| <b>Monthly Targets</b>  |  |   | <b>Status Options</b>   |
| January 2016            | £80.00   | Fill in the target for each month, leave blank if no money is collected during a specific month, select input zero if no money is required in a specific month. | Completed               |
| February 2016           | £80.00   |   | Hot Lead                |
| March 2016              | £80.00   |   | Need 2nd Follow Up      |
| April 2016              | £80.00   |   | Potential               |
| May 2016                | £80.00   |   | Could Persuade          |
| June 2016               | £80.00   |   | Unlikely                |
| July 2016               | £80.00   |   | Declined                |
| August 2016             | £80.00   |   | Still to Contact        |
| September 2016          | £80.00   |   | Abusive                 |
| October 2016            | £80.00   |   | Incorrect Details       |

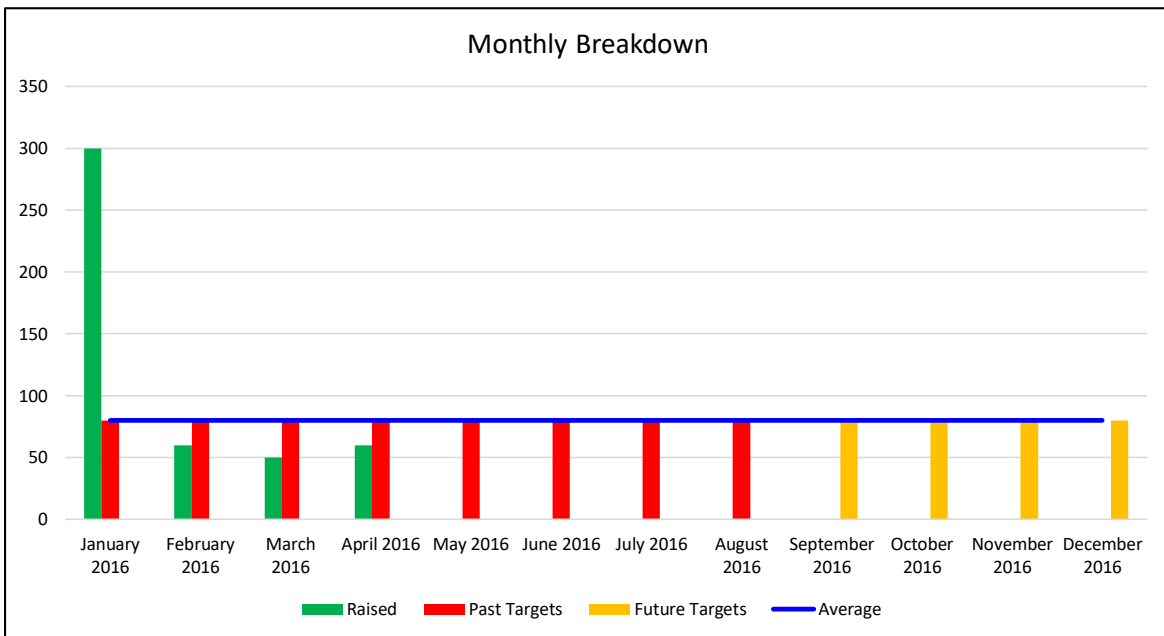


# Test Charity Fundraising Report

## Money Raised by Mr Collector

January 2016 to December 2016 - Report Date: 30 April 2016

|                 |                |                 |                |             |                |
|-----------------|----------------|-----------------|----------------|-------------|----------------|
| Raised to Date: | <b>£470.00</b> | Target to Date: | <b>£320.00</b> | Over Budget | <b>£150.00</b> |
|-----------------|----------------|-----------------|----------------|-------------|----------------|



### Breakdown of Outstanding Potential or Lost Income in the Last 3 Months

| Categories         | Count         | Value   | Count      | Value   | Count      | Value   |
|--------------------|---------------|---------|------------|---------|------------|---------|
|                    | February 2016 |         | March 2016 |         | April 2016 |         |
| Hot Lead           | 0             | £0.00   | 1          | £150.00 | 1          | £100.00 |
| Need 2nd Follow Up | 0             | £0.00   | 0          | £0.00   | 1          | £50.00  |
| Potential          | 1             | £200.00 | 1          | £80.00  | 0          | £0.00   |
| Could Persuade     | 1             | £20.00  | 1          | £120.00 | 0          | £0.00   |
| Unlikely           | 0             | £0.00   | 1          | £20.00  | 0          | £0.00   |
| Declined           | 0             | £0.00   | 0          | £0.00   | 1          | £0.00   |
| Still to Contact   | 0             | £0.00   | 0          | £0.00   | 0          | £0.00   |
| Abusive            | 0             | £0.00   | 0          | £0.00   | 1          | £0.00   |
| Incorrect Details  | 0             | £0.00   | 0          | £0.00   | 0          | £0.00   |

So there you have it, how useful is this going to be to you and your charity? If you wish to get more information, please follow the links below, and remember if you want something custom made for your needs, we do that too!

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