

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>	01 January 2016	<b>End Date:</b>	31 December 2016
<b>Charity Name:</b>	Test Charity		
<b>Individual Name:</b>	Mr Collector		
<b>Default Amount:</b>	£10.00		
	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>		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.	<b>Status Options</b>
January 2016	£80.00		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	

You can then capture the contact details of your potential donors. Phone numbers will take the form as below, and the email addresses become hyperlinks. You can sort or filter by any of the columns.

Annual Collections for Test Charity, made by Mr Collector, between January 2016 and December 2016.				
		Contact Details		
Company / Individual Name	Contact Person	Landline No.	Mobile No.	Email Address
Company 1	Person 1	0203 123 4567	0751 234 5678	<a href="mailto:person1@email.co.uk">person1@email.co.uk</a>
Company 11	Person 11	0203 123 4577	0751 234 5688	<a href="mailto:person11@email.co.uk">person11@email.co.uk</a>
Company 2	Person 2	0203 123 4568	0751 234 5679	<a href="mailto:person2@email.co.uk">person2@email.co.uk</a>
Company 12	Person 12	0203 123 4578	0751 234 5689	<a href="mailto:person12@email.co.uk">person12@email.co.uk</a>
Company 3	Person 3	0203 123 4569	0751 234 5680	<a href="mailto:person3@email.co.uk">person3@email.co.uk</a>
Company 13	Person 13	0203 123 4579	0751 234 5690	<a href="mailto:person13@email.co.uk">person13@email.co.uk</a>
Company 4	Person 4	0203 123 4570	0751 234 5681	<a href="mailto:person4@email.co.uk">person4@email.co.uk</a>
Company 14	Person 14	0203 123 4580	0751 234 5691	<a href="mailto:person14@email.co.uk">person14@email.co.uk</a>
Company 5	Person 5	0203 123 4571	0751 234 5682	<a href="mailto:person5@email.co.uk">person5@email.co.uk</a>
Company 15	Person 15	0203 123 4581	0751 234 5692	<a href="mailto:person15@email.co.uk">person15@email.co.uk</a>
Company 19	Person 19	0203 123 4585	0751 234 5696	<a href="mailto:person19@email.co.uk">person19@email.co.uk</a>
Company 6	Person 6	0203 123 4572	0751 234 5683	<a href="mailto:person6@email.co.uk">person6@email.co.uk</a>
Company 16	Person 16	0203 123 4582	0751 234 5693	<a href="mailto:person16@email.co.uk">person16@email.co.uk</a>

After inputting contact details, put in the last date when you contacted the person, assign them to one of your custom made categories, and put in the amount give or an estimate of what you think that potential donor could be worth. These details need to be updated each time you have contact with the donor, kept as up to date as possible.

NB Categories Colour Codes		
Hot Lead		
Potential		
Could Persuade		
Completed		

Action Details		
Last Contact Date	Status	Value of Donation
01 January 2016	Completed	£100.00
08 January 2016	Completed	£200.00
18 January 2016	Need 2nd Follow Up	£80.00
24 January 2016	Declined	£0.00
03 February 2016	Potential	£200.00
12 February 2016	Could Persuade	£20.00
18 February 2016	Unlikely	£50.00
23 February 2016	Completed	£60.00
04 March 2016	Hot Lead	£150.00
12 March 2016	Unlikely	£20.00
18 March 2016	Potential	£80.00
21 March 2016	Could Persuade	£120.00

The details below will be automatically displayed. You can see how you are doing in comparison to your targets.

Amount Over Specified Targets			
Selected Month	Prior Months	Balance	✓
£220.00	£0.00	£220.00	✓
£220.00	£0.00	£220.00	✓
£220.00	£0.00	£220.00	
£220.00	£0.00	£220.00	
-£20.00	£220.00	£200.00	
-£20.00	£220.00	£200.00	
-£20.00	£220.00	£200.00	
-£20.00	£220.00	£200.00	✓
-£30.00	£200.00	£170.00	
-£30.00	£200.00	£170.00	
-£30.00	£200.00	£170.00	
-£30.00	£200.00	£170.00	
-£30.00	£200.00	£170.00	✓
-£20.00	£170.00	£150.00	
-£20.00	£170.00	£150.00	✓

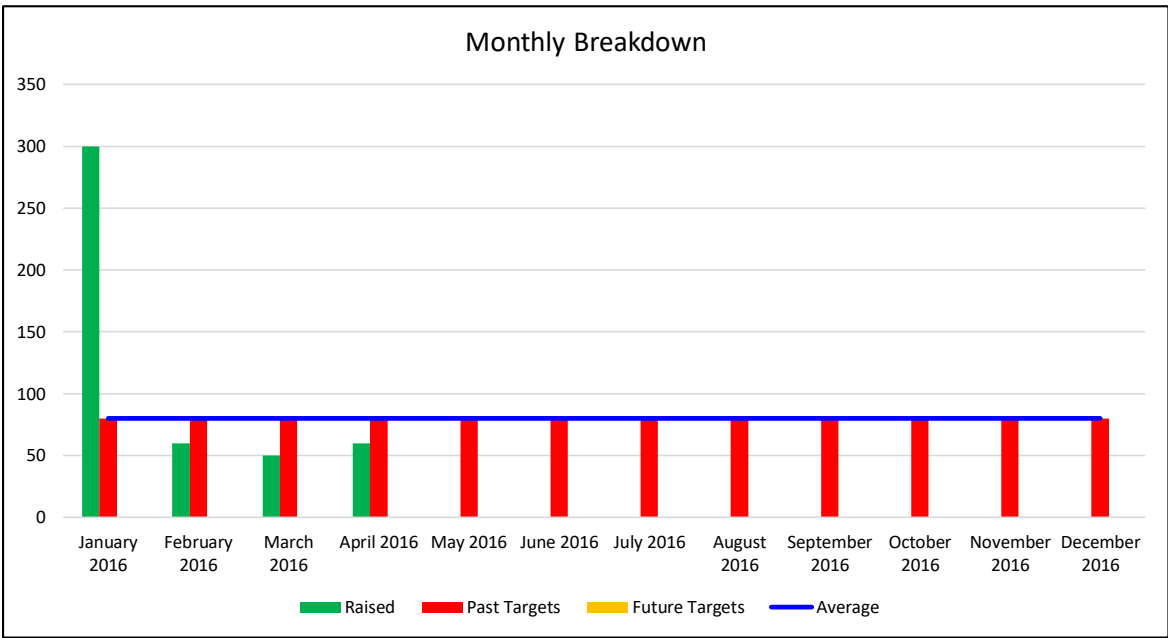
At any stage, you can click on another tab, which will produce a report based on your data. Once you are happy that your data is up to date, click on the 'Report' tab and you will see the report as of the last day of the previous month. Take a look below, the next page of this PDF is an actual report, based on a test sample of the spreadsheet.

# Test Charity Fundraising Report

## Money Raised by Mr Collector

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

Raised to Date:	£470.00	Target to Date:	£320.00	Over Budget	£150.00
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### 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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