Change Progress Chart on main page several times/day to reflect current percentage progress.

Then….

1. Open FD transaction data file:   
   <https://secure.west-point.org/donate/download>
2. Copy donate comment column and paste where it’s useful to you, we’ll delete that column from the raw data later
3. Delete the donate comment column
4. Delete Columns E through O
5. Highlight ALL spreadsheet data by selecting the diamond tab at top-left of spreadsheet
6. Copy all spreadsheet data (Ctrl C)
7. Paste data into Daily Charts, sanitized raw data tab
   1. Open Daily Charts file
   2. Click on Sanitized Raw Data tab
   3. Highlight ALL spreadsheet data by selecting the diamond tab at top-left of spreadsheet
   4. Ctrl V
8. (Skip this step on Day 1) Propagate all formulas to the current day’s row
   1. Highlight the previous day’s data from column D to column AH
   2. Place your cursor over the bottom right corner of the highlighted section until your cursor becomes a “+”.
   3. Click and drag down to the next row. This is today’s data.
9. Click on Donations by Class tab
10. In the “Data” ribbon, click “Refresh All” to refresh Pivot Chart

**\*\*\*If total does not match the online donation report (https://secure.west-point.org/donate/report/), check for post-dated checks!**

**End of Fund Drive**

**FIRST: Save your current fund drive data under its current fund drive number. Save again under the new fund drive number so you don’t overwrite the old data.**

**In Fund Drive Budget History tab**

1. Copy the latest fund drive’s budget in column C, paste into the same cell VALUES ONLY (this value is currently a formula reference to the tables tab, so what you’re doing is breaking that connection).
2. At the end of your data in Column A and B, enter data for the next fund drive. (As I write this, we are starting Fund Drive 36. When this fund drive is complete, you’ll prep the file for Fund Drive 37.)
3. **Next to your new fund drive info, in Column C, place (paste with “ctrl-v”) the formula =Tables!L47**
4. Right click inside your chart and choose “Select Data”
5. In the “Chart data range” field, change the range to include the new row number (Fund Drive 46 brought us to row 39. All you need to change is the last number in this field to the new row number). Click “Ok.”

**In Tables tab,** we only want to show five years of data on the charts on the Running Totals and Donation Averages tabs, so we have to move the last 5 tables over.

1. Scroll all the way to the right to the fifth (oldest) fund drive data.
2. Delete all of the data for that fund drive by highlighting from cell EL3 to cell FR47 (or wherever the bottom of your data is) and press delete.
3. Move to the next most recent fund drive, highlighting all data from DC3 to EI54 (or wherever the bottom of your data is) and copy (Ctrl C or right click and copy)
4. Move back to EL3, right click, paste values only (in some versions of Excel, you have to choose “Paste Special” and select values).
5. Change the fund drive number at the top of that table to the next most recent fund drive number (during fund drive 46, the oldest fund drive information is for FD 42. At the end of this FD, you’ll delete FD 42 data and move FD43 data to where the FD 42 data was and this step is merely ensuring you have the correct label at the top of the table).
6. Go backward in time, highlighting information in a table, deleting, moving the next fund drive information in and pasting values only (important to use paste values).
   1. Highlight DC3 to EI54, delete, highlight BT3 to CZ39, copy. Click back into DC3, paste values. Update table name.
   2. Highlight BT3 to CZ39, delete, highlight AK3 to BQ47, copy. Click back into BT3, paste values. Update table name.
   3. Highlight AK3 to BQ47, delete, highlight B3 to AH47 (or the end of this FD data), copy. Click back into AK3, paste values. Update table name.
7. When you get to the current FD data, click into cell B4. Enter the date the next fund drive will start. Propagate this the same way you would a formula (put your cursor at the bottom right of the cell until your cursor becomes a cross, double click) so that Excel fills in series. Update the table name.
8. When the CFO identifies the goal for the new FD, you’ll need to edit that in column C.
9. Highlight all data from cell D5 to column AH and to the bottom of the last fund drive data
10. Press Delete on your keyboard (if you do this by right clicking, choose “clear contents” instead of “delete”)
    1. I know you’ll be tempted to delete Day 1 and show only the pre-fund drive data, but please don’t do that, as the formulas are different in Day 1 than pre-fund drive, and you don’t want to lose that.
11. To avoid formatting challenges, you can remove the highlighting in the same selection
12. The tables tab is ready for the next FD.

**In Sanitized Raw Data tab**

1. Highlight all data from row 2, down to the bottom. Delete.
2. Sanitized raw data tab is ready for the next FD.
3. Check your formulas in the Tables Tab, row 3 of the next FD and make sure that this deletion didn’t mess with your formulas. The formula in E3 should read “=SUMIFS('Sanitized Raw Data'!$C:$C,'Sanitized Raw Data'!$H:$H,"<"&B4,'Sanitized Raw Data'!$D:$D,"Cash")” When I did this for FD 46, it messed up the formula, taking the “B4” out. Once I put B4 back in, it corrected everything. I had to do this across row 3 in several cells.

**In Running Totals tab**

1. In each chart, you need to update the names of the charted lines to match the data it’s referencing in the Tables chart.
   1. Right click in the chart area
   2. Choose “Select Data”
   3. In the left, where it says “Legend entries (Series)”, scroll down to and click on the current fund drive, click edit
   4. In the top, where it says “Series name,” change the name by adding one to the FD number (change FD 46 to FD 47)
   5. Click ok.
   6. Repeat those steps through the oldest fund drive.
      1. FD 45 becomes 46
      2. FD 44 becomes 45
      3. FD 43 becomes 44
      4. FD 42 becomes 43
   7. Click ok.
2. Follow the steps above in all four charts on this tab
3. This tab is ready for the next fund drive.

**In Donation Averages tab**

1. Complete the same steps as Running Totals Step 1 for two charts
2. This tab is ready for the next fund drive

**In Income Source Analytics tab**

1. Click in the text header of each chart (two charts on this tab). Change to the next fund drive number (change 46 to 47).
2. This tab is ready for the next fund drive

**Donations by Class tab requires no updates**

**Congratulations! You’re ready for the next fund drive. Save the file and have a drink.**