

Instructions for Completing the Campaign Report Envelope

- Sort the pledges by the types listed on the front of the envelope
 - Cash, Check, Direct Bill, Credit Card, Stock, Payroll, Special Events and Corporate Pledge
- Total the amount of dollars and donors that make up each group.
- Enter the following information in the space provided on the top portion of the envelope:
 - Company Account No.: If you have obtained this number from your Relationship Manager please enter it here
 - Phone No.: Enter the company's phone number including area code
 - Firm/Organization Name: Enter the full company name
 - Firm/Organization Address: Enter the company's address
 - Total No. of Employees: Enter the number of individuals employed at your company
 - Final Checkbox: Click this box if everything has been turned in and there is no more information following.
- For the Different Gift types you want to enter the following from step 2:
 - Number of gift for each type
 - Amount of pledges for each type
 - Amount Enclosed (paid) for each type
 - Cash and Checks are for Fully Paid Gifts, the amount enclosed must equal the amount of pledges for each type (ex. If you have \$500 as total amount of fully paid checks then you must have \$500 as the amount enclosed). There cannot be a balance for fully paid gifts.
- Do Not Seal the Envelope!
- Contact your United Way Representative and inform them that the envelope is ready for pick up.
- Once the Representative arrives, if cash and checks are in the envelope, they must verify the amount of both in your presence.
- Once verified there is an area at the bottom of the envelope for both of you to sign and date which verifies that this has been done. This step should eliminate any cash and check discrepancies. Please also include your phone number and email address in case you need to be contacted.
- If you are delivering the envelope to the United Way of Central Carolinas, seal the envelope, sign, date, fill in your phone number and email address in the space provided on the bottom of the envelope.