# F5K Official Spreadsheet Input Instructions for Agencies

This Official Agency Spreadsheet has been redesigned to provide ease of entry, simplicity of processing and improvement in the accuracy of the information submitted. Please note that you will need to use this spreadsheet to submit the names and addresses of the Recipients you wish to receive Thanksgiving dinners. Unfortunately, spreadsheets submitted in a different format will be returned to you along with a request to input your data into the Official Spreadsheet.

## What Do I Do First?

Your first step should be to open the spreadsheet and immediately "**Save As**" and add your Agency Name and the Date to the filename.

*Example: F5K-AgencyName-Date.xls*

This is an important step so that your spreadsheet is unique to your organization and therefore different from spreadsheets that are submitted by other agencies.

To achieve this, please perform the following steps:
1) Open the Spreadsheet we sent to you – **F5K-Official-Agency-Spreadsheet.xls**
2) Click the Excel "**File**" tab (top, left) and on the resulting drop down menu select "**Save As**"
3) This will display the Save As dialog box. Near the bottom of this dialog box will be the "**File Name**" field with the current file name displayed
4) Simply **REPLACE** with your AGENCY NAME and the DATE, e.g. **F5K-AgencyName-Date.xls** and click the "**Save**" button.

All data entry should now be performed on your Agency's unique spreadsheet.

## Spreadsheet Formatting

The format of the spreadsheet is protected and CANNOT be changed except where Agency or Recipient information needs to be entered. This is to help avoid unnecessary keystrokes while inputting data into the spreadsheet.

Enter your Agency Contact Information at the top. The remainder of the spreadsheet deals with Recipient information.

For convenience, we have ordered the spreadsheet so that all required information is on the left and additional details or information that may or may not apply to all Recipients is on the right.

Note that the Spreadsheet will accept up to 200 Recipients. If you need to enter more Recipients, please create a second unique spreadsheet for the remaining names.

*Example: F5K-AgencyName-Date-2.xls*

## Entering Client Information

We need to collect the following information for each Recipient: First Name, Last Name, Phone (if applicable), Street Address, Zip Code and Number of Meals.

We recognize, however, that some Agencies may not have individual fields for First and Last Name, having instead a single field that contains the full name. **If this is your situation**, simply enter or Copy+Paste the full name into the **LAST NAME** field on the spreadsheet.

**Special Note on Zip Code and City:** In order to ensure delivery and help our Volunteer Drivers find your recipients home, we have been working to make our Address Validation processes more efficient. We need your help with this. Historically, our biggest data validity problem has been mismatched Zip Codes and Cities.

*For example, residents of the Village of Estero who live in the 34135 zip code still have a Bonita Springs postal address.*

To avoid this problem please note that you enter **ONLY** the Zip Code, not the City. The spreadsheet will automatically validate that the Zip Code entered is a valid USPS Zip Code and display for you the USPS City that correlates to the Zip Code you entered.

If the Zip Code entered is invalid, the message **INVALID ZIP CODE** will be displayed instead of a city name.

**Should you feel that a zip code you entered is incorrectly rejected, or the City name displayed is different from what you expected**: Please enter the City and Zip Code you consider correct in the "Other Information" column for that Client on the spreadsheet. This will highlight the issue for us and allow us to rapidly follow up with you.

The remaining data fields are optional. If appropriate, Apartment Number or Community/Development should be entered. Also, if Additional Instructions or Other Information is available or would be helpful in our meal delivery to the Recipient, please enter that information where appropriate.

## What If I Have My Own Spreadsheet or I Have Last Year's Spreadsheet?

We realize that some organizations may already have a spreadsheet of their Recipient's names and addresses, but as noted earlier, we cannot process spreadsheets that are not in this Official Spreadsheet Format. This new formatting will help to ensure that delivery to your Recipients is more efficient and more accurate.

## Can I Copy and Paste Information Into Your Official Spreadsheet from Another Spreadsheet?

If you have columns that represent the same columns as our spreadsheet you may Copy+Paste your columns of data into ours.

*For example, if you have a column that contains street addresses for your Recipients, simply copy and paste your address column into ours.*

**BUT, BE VERY CAREFUL** that if you copy multiple columns, e.g. First Name, Address, Phone, etc. that the data gets placed in the appropriate columns and that you keep the Recipient's data aligned. We suggest when you are finished to spot check a few names and addresses, with particular emphasis on the first and last row.

## Questions?

If you have questions on how data is to be entered, or you come across a situation not covered in these instructions, please contact:

> **Cheryl Frogge**
> frogge1@aol.com
> 239.872.3700

We look forward to working with you this Thanksgiving,
The F5K Team