

Host Worksheets Instructions

Introduction

This Microsoft Excel file contains the following worksheets. You can switch between the worksheets by clicking on the tabs at the bottom of the Excel window. If you cannot see the tabs, see the "Hints and Tips" section at the bottom of this worksheet.

1 Host Site Instructions

This tab should be white, because it is the worksheet you are currently viewing. Read on for more instructions and tips on how to use this Excel file.

2 Member Order Form

On this tab you will find this month's individual member order form.

3 Combined Order Form

This tab contains the form with your site's bulk order that you should send in to the office by this month's host site order deadline.

4 Electronic Tan Sheet

This tab contains an Excel spreadsheet that you can use to track your orders for this month. When you enter information into this sheet, that data automatically updates the Combined Order Form and the D-Day Worksheet.

5 D-Day Worksheet

Since the Electronic Tan Sheet is so large, it is difficult to print out. However, you can print out this worksheet easily on 8.5"x11" paper and take it with you on Distribution Day. It has most of the information you'll need to keep track of orders, etc. You can't enter any information into this worksheet. It updates automatically with data from the Electronic Tan Sheet.

6 Table Tags

Click on this tab and print it out. You'll get one sheet of paper with each product listed on it in big, bold type. You can use these table tags to organize your distribution on SHARE Day.

7 Printable Tan Sheet-Legal

If your printer can print on legal size paper, you can print this sheet out and use it on SHARE Day. It has all of the information you'll need to track orders, etc. You can't enter any information into this worksheet. It updates automatically with data that you enter into the Electronic Tan Sheet.

Using the Worksheets

Member Order Form

To customize the member order form with your host site's information, click on the Member Order Form tab. Scroll down to the bottom of page 1. On the left, you'll see a yellow box called "SHARE Day Pick-Up Information". Underneath you can enter in your host site pick-up time, location and telephone numbers. Print out this order form and make copies to distribute in your community. Hint: save this file so that next month you can use Excel's "copy" and "paste" functions to transfer your pick-up information into next month's order form.

Combined Order Form

If you keep track of your orders on the Electronic Tan Sheet, the Combined Order Form will update automatically with most of the information you'll need. Just don't forget to fill in the Host Site Name line and the "First Order, Second Order, Add On" box at the top of the form. If you do NOT use the Electronic Tan Sheet, you can still type your total order numbers directly into this Excel document. Either way, when you're ready to send in your order to the main office, leave this tab open and save the file. Email the worksheet as an attachment to: orderform@sharewi.org . If you're having trouble emailing the file, you can always print the Combined Order Form and fax it to: 262-783-2515.

Electronic Tan Sheet

This is the best way to keep track of your site's orders each month. On this worksheet you can enter member information (phone numbers, addresses, etc.) as well as tally up each member's order. The spreadsheet will do the rest of the math for you! The 10% shipping fee is automatically added to each order. This is the default, so if your site is NOT on a truck route, you'll need to delete the formula in this cell. You'll also see a column for the handling fee, which you will have to enter if your site charges this fee. When you've got each member's order entered, you can check the totals to make sure they match the order form. It's a good way to double-check orders!

D-Day Worksheet

You can't enter any information into this worksheet--it updates automatically with information from the Electronic Tan Sheet. Since the Electronic Tan Sheet is so large, it is difficult to print out. However, you can print out this worksheet easily on 8.5"x11" paper and take it with you on SHARE Day. It has the information you'll need to keep track of orders, etc.

Table Tags

Again, you can't enter any information into this worksheet--it is updated automatically every month. Just click on the tab and print it out. You'll get one sheet of paper with each product listed on it in big, bold type. You can use these table tags to organize your distribution on SHARE Day.

Printable Tan Sheet-Legal

Again, you can't enter any information into this worksheet--it is updated automatically every month. If your printer can print on legal size paper, you can print this sheet out and use it on SHARE Day.

Hints and Tips

- 1** If you have any questions about these worksheets, feel free to call the office at 1-800-548-2124. We will do our best to help you.

- 2** If you're having trouble seeing the tabs at the bottom of the Excel window, make sure you're looking in the right place. They should be below the white area of the worksheet, but above "Start" bar that shows open programs and windows at the very bottom of your screen. The first tab on the left is white and should be labeled "1. Host Site Instructions". If you still don't see the tabs, you may need to maximize the window using the maximize button (it looks like a window) in the upper right-hand corner of the Microsoft Excel window. If you still cannot see the tabs, click on the "Tools" menu at the top of the screen, select "Options", click on the "View" tab, and make sure the check box for "Sheet tabs" at the lower right of the dialogue box is selected. Click "OK" and the tabs should be visible.

- 3** You'll notice that you can't click on all of the cells in these worksheets. That's because all cells with formulas and special formats are protected. This has been done to ensure that the formulas don't get altered accidentally, which could result in math errors. If you are interested in finding out more about how to customize any of the spreadsheets to work better for your site, call the main office at 1-800-548-2124 for help.

- 4** To avoid re-entering member information every month, you can transfer it using Excel's "copy" and "paste" functions. . In the Electronic Tan Sheet, copy the cells with members' names, addresses, etc. Then open up next month's "hostworksheets" Excel file and paste these cells into next month's Electronic Tan Sheet.

- 5** Here's a tip for handling 1st, 2nd and Add-On orders. Collect your orders on the Electronic Tan Sheet until you submit your first order. Then do a "Save As" and adjust the file name so that you can collect any orders for your 2nd host site order. Do the same for any add-ons. Then, once your host site order is finalized, you can copy the 2nd orders and add-on orders and paste that data into your 1st order spreadsheet. Then you will have all of your order information for the month in one spreadsheet. Your site's information will be complete to print out the D-Day worksheet.

- 6** This Excel document is a work in progress. Please call the office with any suggestions or corrections--your ideas may help us improve the file to help out other sites, as well!