



A Donor & Member List That Won't Become a Mess

more scattered copies or lost records An Extended Guide · No. 2075

————— An Extended Guide · No. 2075 —————

Tech Made Simple. Service Made Personal.

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THE 60-SECOND VERSION

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1. The Whole Idea on One Page If you read only one page, read this. Here is the whole plan as a short checklist. Every group keeps a list of its people — members, donors, volunteers. Kept well, that list is the group's backbone: it powers the newsletter, the dues, the thank-you notes, and the year-end receipts. Kept badly, it becomes a tangle of half-finished copies no one trusts. This guide shows how to keep one clean list that serves every job for years.

- 1 Keep one list in one place — not five copies scattered among volunteers.
- 2 Decide the columns once: name, contact, dues or giving, join date, notes.
- 3 Enter everyone the same tidy way, so the list stays consistent.
- 4 Watch for duplicates and merge them as they appear.
- 5 Protect it — it holds personal details people trusted you with.
- 6 Back it up, and hand it on cleanly when the keeper changes. **GOOD TO KNOW** You do not need fancy software to do this well. A single, well-organized spreadsheet, kept by one person and backed up, serves most small groups beautifully — and this guide shows how to set one up. The rest of this guide walks through choosing where the list lives, deciding the columns, entering people tidily, avoiding duplicates, protecting privacy, and backing it up — in plain language, a page at a time. **WHY IT MATTERS** 2. Why a Clean

List Is Worth It A group's list of people is one of its most valuable possessions, and one of the easiest to let rot. When it is clean, every other task gets easier: you can send the newsletter without wrestling addresses, see who has paid at a glance, and thank donors without missing anyone. When it is a mess, every task becomes a chore, and people quietly fall through the cracks. A clean list powers the newsletter, dues tracking, and thank-you notes with ease. It lets you see, at a glance, who is active, who has lapsed, and who has given. It keeps people from being missed, double-counted, or wrongly dropped. It is the group's memory — losing it means starting relationships over.

TIP

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Think of the list as the group's address book and ledger rolled into one. Time spent keeping it tidy is repaid every single time you send a mailing, collect dues, or thank a donor. The good news is that keeping a clean list is mostly about a few simple habits, not expensive tools. Set it up well once, tend it lightly, and it serves the group for years.

ONE HOME 3. Keeping the List in One Place The first and most important rule is that there is exactly one list. The great enemy of a clean list is copies: the treasurer has one, the secretary has another, someone emailed a third last year. Soon none of them agree, and no one knows which is right. Pick one home for the list, and let every other 'copy' be retired. Decide on one official list — the single source everyone trusts. Retire the stray copies on various volunteers' computers. Store the one list where the right people can reach it, like a shared drive. When someone needs the list, they go to the one home, not make a new copy.

WATCH OUT Multiple copies are how a list goes bad. The moment two people edit two different copies, the list has split, and merging them later is a miserable job. One home, always, is the whole secret. This single discipline — one list, one home — prevents the most common and most painful way group lists fall apart. Everything else in this guide builds on it.

SPREADSHEET OR TOOL 4. A Spreadsheet or a Proper Tool? You can keep your list in a simple spreadsheet, or in a tool built for the job — a membership app, a donor program, or a church management system. For most small groups, a well-organized shared spreadsheet is plenty and costs nothing. A dedicated tool makes sense when the group grows large or needs to track many details per person. A shared spreadsheet: free, flexible, and enough for most small groups. A membership or donor tool: worth it when the list grows large or complex. A church management system: ties the list to giving, directories, and groups.

WATCH OUT

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Whichever you choose, the habits in this guide keep it clean.

If you are unsure, start with a shared spreadsheet. It is free, everyone roughly understands it, and it moves easily into a fancier tool later if you outgrow it. The rest of this guide assumes a spreadsheet, but the principles apply to any tool. Do not buy donor software before you need it. A tidy spreadsheet handles a surprising amount, and jumping to a complex tool too early often leaves a group paying for features no one uses.

THE COLUMNS

5. Deciding What to Track A clean list starts with deciding, once, what columns it will have — and sticking to them. The temptation is to track everything; the wiser path is to track what you will actually use. A tight set of clear columns is easy to keep tidy. A sprawling one invites blanks, guesses, and mess. Name, split into first and last, so you can sort and address properly. Contact details: email, phone, and mailing address as needed. Status: current member, lapsed, donor, volunteer — whatever fits your group. Dates: when they joined, and when dues or gifts were last received. A notes column for anything that does not fit neatly elsewhere.

GOOD TO KNOW Splitting names into first and last columns seems fussy but pays off constantly — it lets you sort alphabetically, address letters properly, and avoid the muddle of 'Smith, John' in some rows and 'John Smith' in others. Decide your columns before you enter a single person, and resist adding new ones on a whim. A clear, settled structure is what keeps the list tidy as it grows.

CONSISTENCY

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6. Entering Everyone the Same Way The quiet secret of a clean list is consistency: entering every person the same way, in the same format, every time. When one row says 'OH' and another 'Ohio,' when some phone numbers have dashes and others do not, the list becomes hard to sort, search, and trust. A little agreed style keeps it uniform. Agree on a format for phone numbers, and use it for everyone. Write states, towns, and other repeated values the same way each time. Capitalize names consistently — not SMITH in one row and Smith in another. Put dates in one consistent format throughout. TIP Write your handful of formatting rules on the first row or a notes tab of the spreadsheet, so whoever enters data follows the same style. Consistency is far easier to keep than to fix later. None of this is fussy for its own sake. A consistent list sorts cleanly, searches reliably, and merges without trouble into a mailing or a report. Inconsistency is where the small headaches breed. DUPLICATES 7. Catching Duplicates Early The most common way a list gets messy is duplicates — the same person entered twice, perhaps under a nickname, a maiden name, or a second email. Duplicates throw off your counts, send someone two newsletters, and make giving totals wrong. Catching them early, as they appear, is far easier than untangling them later. Before adding someone, check whether they are already on the list. Watch for the same person under a nickname or an old name. When you find a duplicate, merge the two into one complete row. Sort the list by name now and then to make duplicates jump out. GOOD TO KNOW Sorting the whole list alphabetically by last name is the quickest way to spot duplicates — the two versions of a person land next to each other, where they are easy to see and merge.

ONE KEEPER**7. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

A little vigilance about duplicates keeps your counts honest and your members from being double-mailed. Merge them as you find them, and the list stays an accurate picture of who your people really are. 8. Naming One Person to Keep It A list with many cooks spoils quickly. The cleanest lists have one keeper who owns the official copy and makes the changes. Others can suggest additions and corrections, but the keeper enters them, so the list stays consistent and no stray copies spring up. It is light work, done a little at a time. Name one keeper — often the secretary or membership chair. Others send the keeper changes; the keeper makes them in the one list. This keeps the style consistent and prevents rival copies. When the keeper steps down, the list and the habits pass to the next person. **GOOD TO KNOW** Having one keeper does not mean no one else can help — it means changes flow through one pair of hands, so the list stays consistent and whole rather than splintering into versions. One keeper, with a simple way for others to send in changes, is how a list stays clean through years of comings and goings. It is a tidy, valued job for an organized volunteer. **PRIVACY** 9. Protecting People's Personal Details Your list holds personal information — names, addresses, phone numbers, perhaps giving history — that people trusted the group to keep carefully. Treating it with respect is both a duty and a kindness. The core rule is simple: use the details only for the group's own purposes, share them only with those who need them, and never hand them to outsiders. Use the list only for the group's own communication and records. Share it only with the few volunteers who genuinely need it. Never sell, trade, or give the list to another organization. Be especially careful with giving history — it is sensitive and private.

WATCH OUT

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Donor giving history is among the most sensitive information a group holds. Who gave how much should be seen only by the few who must know — never shared casually, posted, or discussed where it could embarrass a generous, private person. People give a group their details and their generosity trusting both will be handled with care. A little discipline about privacy honors that trust and protects the group's good name. WHO SEES WHAT 10.

Deciding Who Can See the List Not everyone in the group needs to see the whole list, and certainly not the giving details. A little thought about who has access protects members' privacy and prevents accidental leaks. The newsletter sender needs emails; the treasurer needs giving; most volunteers need neither. Match the access to the need. Give full access only to the keeper and the officers who truly need it. Give limited views to others — the mailing list without the giving column, say. Keep giving history to the treasurer and a trusted few. Review who has access once a year and trim anyone who no longer needs it. TIP A shared spreadsheet can often show some people only certain columns, or you can keep the sensitive giving data on a separate, more tightly held sheet. Match what each person sees to what they actually need. Thoughtful access is quiet protection. It lets the volunteers who need the list do their jobs while keeping the most sensitive details in the fewest, most trusted hands. BACKUPS 11. Backing Up the List A group's list is too valuable to keep in only one place. Computers fail, files get deleted by accident, accounts get locked. A simple backup habit means a bad day never erases years of the group's memory. It takes minutes and is the cheapest insurance the group can buy.

- 1** Keep the main list where it is automatically saved, like a shared online drive.
- 2** Save a dated copy somewhere separate every month or two.
- 3** Keep at least one backup off the main computer — another drive or account.

GOOD TO KNOW

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- 1 Before any big edit or cleanup, save a copy first, in case you need to undo. A dated backup — 'members-2026-10.xlsx' — before a big cleanup is a lifesaver. If a merge goes wrong or a column gets deleted, you can simply return to the copy from before. You will almost never need the backup, and the one time you do, it will feel like a miracle. A few minutes now and then protects the group's whole list from a single unlucky moment.
- LAPSED MEMBERS** 12. Handling Members Who Drift Away People come and go. A member stops paying dues, a donor goes quiet, a volunteer moves away. A clean list handles this gracefully — not by deleting people the moment they lapse, but by marking their status honestly, so you know who is active and who has drifted, and can perhaps win them back. Mark lapsed members with a status rather than deleting them outright. Keep a lapsed member's history, in case they return. A gentle 'we miss you' note sometimes brings a lapsed member back. Only remove someone entirely when you are sure they are truly gone — or they ask.
- GOOD TO KNOW** Keeping a light history of lapsed members means that when one returns — as they often do — you welcome them back by name, with their history intact, rather than treating a longtime friend like a stranger. Honest status-keeping turns your list into a true picture of the group over time. It tells you not just who is here now, but who has been, which is the raw material for bringing good people back.
- GIVING HISTORY** 13. Tracking Gifts and Dues Over Time For a group that takes dues or donations, tracking who gave what, and when, is valuable — for thanking people, for year-end receipts, and for understanding the group's support. This can live in the same list or a linked one, and the key is to record each gift simply and consistently as it comes in. Record each gift or dues payment with a date and amount.

TIP

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Keep it tied to the right person, so their history is whole.

A running total per person helps with thank-yous and year-end receipts. Keep this data especially private, seen only by those who must. Recording gifts as they arrive, rather than in a scramble at year-end, makes the whole thing painless. A minute per gift through the year beats a miserable week in January reconstructing it all. A simple, consistent giving record is the foundation for thanking donors well and producing year-end statements easily. The library's guide on year-end giving statements picks up exactly there. MAILING & MERGE 14. Using the List for Mailings One of the list's biggest payoffs is making mailings easy — whether an emailed newsletter or printed letters and labels. A clean, consistent list drops straight into these jobs. A messy one turns every mailing into a fight with half-blank addresses and mangled names. This is where the earlier discipline pays off. A clean list feeds your email newsletter tool directly. For printed letters, a mail merge pulls names and addresses from the list. Consistent names mean letters address people properly, not 'Dear SMITH.' Keeping emails and addresses current means fewer bounces and returns. GOOD TO KNOW The library has separate guides on group email lists and on mail merge for letters and labels. A clean member list is the fuel that makes both of those run smoothly. Every mailing you send is a test of your list's cleanliness. Keep it tidy, and mailings become a few quiet clicks; let it slip, and every mailing becomes an evening of fixing names and chasing bounces.

CLEANUP

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15. A Regular List Cleanup Even a well-kept list drifts over time. Addresses go stale, emails bounce, duplicates creep in, statuses fall behind. A gentle cleanup once or twice a year keeps the list healthy, so it never reaches the point of being a mess to be dreaded. Tie it to a date you already keep, and it becomes routine.

- 1 Save a backup copy before you start.
- 2 Sort by name to catch and merge any duplicates.
- 3 Update statuses — mark lapsed members, add new ones.
- 4 Fix or remove addresses and emails that keep bouncing.

- 5** Confirm who has access, and trim anyone who no longer needs it. **WATCH OUT** A short cleanup twice a year is far easier than a dreaded overhaul every few years. Small, regular tending keeps the list from ever becoming the tangle this guide helps you avoid. Think of the cleanup as light gardening, not heavy construction. A little weeding now and then, and the list stays a pleasure to use rather than a chore to face. **GROWING UP 16.** When to Move to a Real Tool A spreadsheet serves most small groups well, but there comes a point for some where a proper membership or donor tool earns its keep. Knowing the signs helps you move at the right time — not so early that you pay for unused features, and not so late that the spreadsheet has become unmanageable. The list has grown into the hundreds and feels unwieldy in a spreadsheet. You need features a spreadsheet struggles with — online signups, automatic receipts, portals. Several people need to work with it in ways a spreadsheet handles awkwardly. You are spending real time on tasks a tool would automate. **GOOD TO KNOW** When you do move to a tool, your clean, consistent spreadsheet is a gift — it imports smoothly. A messy one brings its mess along. So the tidy habits pay off even in the move to something fancier.

HANDOFF

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There is no shame in staying on a spreadsheet for years if it serves you, and no shame in moving up when you outgrow it. The clean habits in this guide make either path smooth.

17. Handing the List to the Next Keeper Volunteers rotate, and the list must survive the handoff. The danger is that the list, its backups, and the know-how all live with one person who then leaves. A little planning means the next keeper inherits a working list and the habits to keep it, rather than a mystery and a mess. Keep the list in the group's shared home, not a personal computer. Write down the few formatting rules and the backup routine. Walk the new keeper through the list once before the old one steps away. Make sure access passes to the new keeper and is removed from the old. **WATCH OUT** The worst time to discover the list lived only on a departed volunteer's laptop is after they have gone. Keep it in the group's shared home, backed up, so no one's departure can take it with them. A clean handoff is what makes a list a lasting part of the group rather than a personal favor that ends when a volunteer moves on. Plan it, and the list outlives any one keeper. **WHY NOT PAPER** 18. Why a Notebook Isn't Enough Anymore For generations, groups kept the membership in a notebook or a card file, and for a small, slow-changing group that can still work. But a paper list cannot be sorted, searched, backed up, or fed into a mailing without copying it all out by hand. As soon as you want to email the group or print address labels, a digital list saves hours that paper simply cannot. Paper can't be sorted, searched, or counted without doing it by hand. It can't feed a mailing or a newsletter — every address must be recopied. One spilled coffee or lost notebook, and the group's memory is gone. A digital list does all of this and backs itself up besides.

GOOD TO KNOW

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There is no shame in a paper list for a tiny, stable group. But the moment you want to email everyone or print labels, a digital list repays the switch many times over — and it can never be lost to a single mishap. If your group still keeps the list on paper, moving it to a simple spreadsheet is one of the most worthwhile afternoons you can spend. Everything that follows in this guide becomes possible the moment it is digital. FROM SCRATCH 19.

Building the List From Nothing If your group is starting fresh with no list at all, you have a happy chance to do it right from the first row. Set up your columns, agree your formatting rules, and enter people cleanly as they join. A list built tidily from the start almost never becomes the mess this guide helps others untangle.

- 1 Open a new spreadsheet in the group's shared home.
- 2 Put your agreed columns across the top row.
- 3 Write your formatting rules on a notes tab for whoever enters data.
- 4 Enter people cleanly as they join, one tidy row each.
- 5 Start the backup habit from the very first week. TIP The best time to set good habits is at the very first row, before any mess can form. A list born tidy stays tidy with almost no effort; a list born sloppy takes real work to rescue later. Starting from nothing is a gift in disguise: you can build in every good habit from the outset. Do that, and your list will be a clean, trusted asset for as long as the group exists. RESCUING A MESS 20. Cleaning Up a List That's Already a Tangle Most groups come to this guide with a list already in some disarray — a few copies, inconsistent entries, duplicates, blanks. Take heart: almost any tangle can be straightened out in an afternoon or two with a calm, orderly approach. The key is to work from one chosen copy and fix one thing at a time.
- 6 Gather every copy and pick the most complete one as your starting point.

GOOD TO KNOW

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- 1 Save a backup before you touch anything.
 - 2 Fix the columns and formatting first, so everything lines up.
 - 3 Sort by name and merge the duplicates you find.
 - 4 Fill the important blanks, and retire the other copies for good. Do not try to fix everything at once. One pass for columns, one for duplicates, one for blanks — working in orderly passes turns an overwhelming mess into a series of small, doable jobs. A tangled list feels daunting, but it yields quickly to patient, orderly work. An afternoon or two of calm cleanup, and you emerge with one clean list and the habits to keep it that way.
- NAMES**
21. Getting Names Right Names are where a list most often turns sloppy, and where sloppiness shows most plainly — a letter addressed to 'Dear SMITH' or to the wrong name is noticed. A little care with how you record names keeps your mailings warm and correct, and keeps people from feeling like a database entry rather than a valued member. Keep first and last names in separate columns for proper sorting and addressing. Record the name people like to be called, not just their formal name. Note a title only where it matters to the person or the mailing. Capitalize consistently — 'Smith,' never 'SMITH' or 'smith.' TIP Record both the formal name and the preferred one where they differ — 'Robert' who goes by 'Bob.' Then your letters can be proper and your emails can be friendly, each as the moment calls for. Getting names right is a small thing that members feel. A list that addresses people correctly and warmly reflects a group that pays attention — exactly the impression you want every mailing to give.

ADDRESSES

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22. Keeping Addresses and Contacts Current Contact details drift faster than almost anything else on a list. People move, change phone numbers, and switch email addresses. A list full of stale contacts means returned mail, bounced email, and members who quietly stop hearing from you. A light habit of updating keeps your reach intact. Update an address or email the moment a member tells you it changed. Watch for returned mail and bounced email as signs a contact is stale. Ask members to confirm their details once a year, perhaps at renewal. Keep both email and mailing address where you can, for flexibility. GOOD TO KNOW Renewal time is a natural moment to ask members to confirm their contact details. A simple 'is this still your address and email?' keeps the whole list fresh with almost no extra effort. Current contacts are what let your list actually reach people. A little regular updating — and a yearly confirmation — keeps your mailings landing and your members connected rather than quietly lost. TAGS & GROUPS 23. Sorting People Into Groups As a list grows, it helps to mark people by group or interest — committee members, choir, newsletter-only, lapsed, major donors. A simple column of labels lets you pull out just the people you need for a given mailing or task, without keeping separate lists for each. One list, many views. Add a column for labels or groups, such as 'committee' or 'choir.' Use it to pull out just the people you need for a particular mailing. Keep the labels few and clear, so they stay useful rather than cluttered. This lets one list serve many purposes without splitting into several. TIP A single 'group' column turns one list into many. Want to email just the committee? Filter by that label. It beats keeping — and having to keep in sync — a separate list for every subgroup.

CONTACT PREFERENCES

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Labels are the trick that lets one clean list do the work of many. A few clear tags, and you can speak to the whole group or just the choir, all from the same tidy, single source. 24.

Respecting How People Want to Be Reached People differ in how they want to hear from a group — some love email, some prefer a mailed letter, some a phone call, and some want only the essentials. Noting each person's preference, and honoring it, is both courteous and effective: a member reached the way they like is a member who stays engaged. Note how each person prefers to be contacted — email, mail, or phone. Honor anyone who asks to hear less, or only about certain things. Keep a clear mark for anyone who has asked not to be contacted at all. Respecting preferences keeps members warm and keeps you within the rules. WATCH OUT If someone asks to be removed or to hear less, honor it promptly and mark it clearly, so a later volunteer does not undo their wish. Ignoring a stated preference is the fastest way to lose a member's goodwill. Honoring how people want to be reached respects them as individuals, not entries. A list that remembers these preferences keeps members feeling known and valued, which is what keeps them belonging.

IMPORTING 25. Bringing In a List From Elsewhere Sometimes you need to bring in a list from another source — an old spreadsheet, a sign-up sheet, an export from another tool. This is a moment to be careful, because a sloppy import is how duplicates and inconsistent entries flood in. A little preparation before merging keeps your clean list clean. Before importing, tidy the incoming list to match your columns and formats. Back up your main list first, in case the merge goes wrong. After importing, sort by name to catch any duplicates it introduced. Check that formats — phones, dates, states — still match throughout.

GOOD TO KNOW

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An import is the most common moment a clean list suddenly gains duplicates and mismatched formats. Tidy the incoming data to match yours first, and the merge adds people cleanly instead of making a mess. Imports are useful but worth doing carefully. A little tidying before, a backup first, and a duplicate check after, and you fold new people in without disturbing the clean list you worked to build. NO FEAR 26. If Spreadsheets Make You Nervous If the word 'spreadsheet' makes you uneasy, you are in good company, and you do not need to become an expert. For a member list you need only a few simple things: typing into cells, sorting by a column, and filtering to show a group. Those few skills, learned once, are all it takes to keep a clean list with confidence. You only need a few basics: typing in cells, sorting, and filtering. You do not need formulas or any of the advanced features to keep a list. A quick lesson once, and the everyday use becomes second nature. If it still feels daunting, a patient helper can set it up and show you. WATCH OUT You do not have to master spreadsheets to keep a member list — just three gentle skills: type, sort, filter. Learn those once, and the rest of the spreadsheet can stay a mystery for all you need it. Do not let nervousness about spreadsheets keep your group's list in a messy state. The handful of skills you need are gentle and quickly learned, and a patient hand can get you started if you would like one. DELICATE CHANGES 27. Handling Delicate Updates Gracefully A member list touches real lives, and sometimes you must record hard things — a member who has passed away, a couple who have separated, someone who asked to be quietly removed. Handling these with care and discretion is part of keeping the list well, and it matters to the people affected and to the group's heart.

WATCH OUT

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When a member passes, update the list gently and stop mailings promptly.

Handle separations with discretion, splitting a household record kindly. Honor a quiet request for removal without fuss or questions. Keep such changes private, seen only by the keeper and necessary officers. Few things wound like a cheerful mailing arriving for someone who has died, or addressed to a couple who have parted. Update the list promptly and gently when you learn of such changes, so no painful letter ever goes out. The list is finally about people, not data. Handling its hardest updates with promptness and tenderness is a quiet kindness — and the mark of a group that keeps its records with its heart as well as its head. FEEDING TOOLS 28. How the List Powers Everything Else It is worth seeing how central this one clean list is, because it quietly feeds nearly every other tool the group uses. The email list draws its members from it. The dues tracking matches against it. The newsletter, the mailed letters, the thank-you notes, the year-end receipts — all lean on this single, well-kept source. Your email list is built from the member list's addresses. Dues and giving are tracked against the people it holds. Mailings and labels merge straight from its names and addresses. Year-end receipts draw on its giving history. GOOD TO KNOW Because so much flows from this one list, keeping it clean pays off everywhere at once. A single tidy source means every other tool — email, dues, mailings, receipts — starts from good information rather than a muddle. This is why the list deserves the care this guide describes: it is the root that everything else grows from. Keep the root healthy, and the whole of the group's communication and record-keeping flourishes.

MISTAKES**19. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

29. The Mistakes That Make a Mess Most lists that become a mess do so for a few avoidable reasons. Knowing them in advance is the easiest way to keep yours clean for the long haul. Keeping several copies, so no one knows which list is right. Entering people inconsistently, so the list won't sort or merge. Letting duplicates pile up until counts and totals are wrong. Leaving the list and its giving data open to anyone in the group. Keeping it on one person's computer with no backup and no handoff plan. TIP Run a simple test: could you, in one minute, pull a clean mailing list of current members from your list — and are you sure there is only one, backed-up copy of it? If yes, your list is healthy. Avoid these five, and the list looks after itself. One home, consistent entry, no duplicates, careful privacy, and a backup with a handoff plan cover nearly everything. COMMON QUESTIONS 30. Answers to Common Questions A few questions come up whenever a group tackles its member list. Here are short, honest answers to the ones heard most. 'Do we need special software?' Usually not — a clean shared spreadsheet is plenty. 'Who should keep it?' One keeper, with others sending in changes. 'Is it okay to keep giving history?' Yes, kept private and seen only by a trusted few. 'How often should we clean it up?' Once or twice a year, tied to a date you keep. 'What if the keeper leaves?' Keep it in the group's shared home, backed up, with a handoff. GOOD TO KNOW If a question here makes you realize your list is in rough shape, take heart — most lists can be tidied in an afternoon or two with the steps in this guide, and kept clean from then on with light habits. Most groups find that a clean list is less about tools and more about a few simple habits, kept faithfully. Set it up well once, tend it lightly, and it serves you for years.

GETTING STARTED**20. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech**

31. Getting Yours in Order You now know the whole shape of it: one list in one home, a settled set of columns, consistent entry, no duplicates, careful privacy, and a backup with a handoff plan. The best time to get your list in order is soon, before the next mailing or dues season reminds you of the mess.

- 1 First: gather your scattered lists into one official home.

- 2 Settle on your columns and write down a few formatting rules.
- 3 Clean it once — merge duplicates, fix formats, update statuses.
- 4 Set who can see what, keeping giving data to a trusted few.
- 5 Name a keeper, start a backup habit, and plan the eventual handoff. **GOOD TO KNOW** You do not have to remember all of it. You just have to remember you can call. Friendly, in-home help, and I come to you — (330) 200-8042. A clean member list is the quiet foundation under a group's newsletter, dues, and thank-yous. Take the afternoon to get it in order, keep up the light habits, and it will serve your group faithfully for years. **BILL'S HERE TO HELP 32. You Don't Have to Sort It Out Alone** If your list has become a tangle of copies, or you want to set one up properly from the start, that is exactly the kind of thing I help local groups with. There is no such thing as a silly question, and I am glad to sit down with your keeper and get the list clean, organized, and safely backed up. I can help you gather your scattered copies into one clean list, set up sensible columns, merge the duplicates, arrange who can see what, start a backup habit, and leave you with a simple written cheat sheet. Then the group owns a list it can trust for years. **GOOD TO KNOW** Friendly, in-person tech help for people and groups around Portage County. I come to you. If you are not happy with a visit, I will make it right. (330) 200-8042.

CHEAT SHEET

21. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

Whether you sort it out yourself with this guide or give me a call, the goal is the same: one clean, private, backed-up list that powers everything your group does, and survives every change of volunteer. **Everyday Cheat Sheet** Keep this page handy. It points you straight to what to do for each task. I want to... Do this Keep one home One official list, not five copies on different computers Pick the tool A clean shared spreadsheet suits most groups; a tool when you outgrow it Settle the columns Decide fields once — split names, contact, status, dates, notes Enter consistently Same formats for phones, dates, and names, every time Kill duplicates Sort by name to spot them; merge as they appear Guard privacy Share only as needed; keep giving history to a trusted few Back it up Dated copies off the main computer; save before any big cleanup Name a keeper & plan handoff One owner; keep it in the group's shared home for the next person Get help Call Bill: (330) 200-8042

HOW I CAN HELP

22. For electrical, gas, water, or ladder work, please call a licensed professional. — Bill's Home Tech

Your Visit — and My Promise In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included. Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo). GOOD TO KNOW My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated. Call or text (330) 200-8042 · Book a visit: billshometech.com/book · bill@billshometech.com This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.

AT A GLANCE

A Picture to Follow Along

One Clean List, Many Uses

Keep it tidy once, and it serves every job your group has.

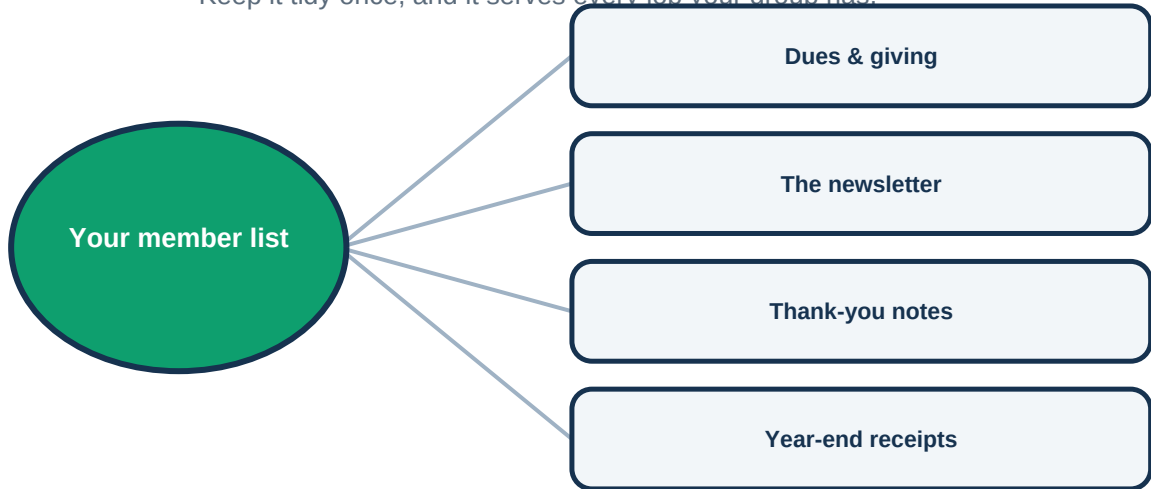


Illustration — a schematic. Set-up screens differ; each takes only a few minutes.

AT A GLANCE

A Second Look

Keeping the List From Sprawling

A few habits keep it clean for years.

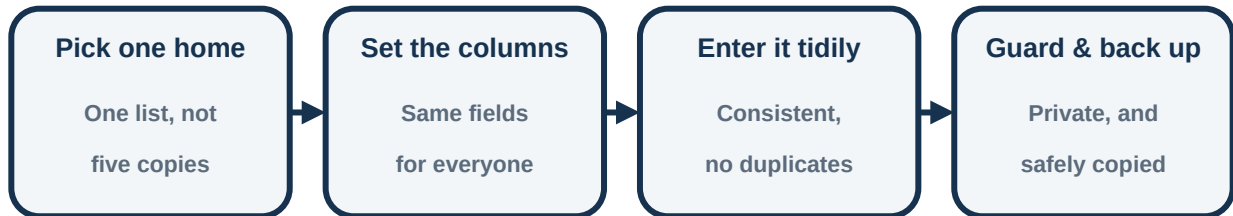


Illustration — a schematic. The order is a suggestion; do one box at a time.

A schematic of the plan — company steps vary; the order does not have to.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: billshometech.com/book · bill@billshometech.com

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