HOW TO CREATE YOUR CHECKLIST FOR BUNDLES AND GIVEAWAYS
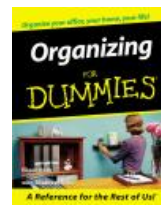
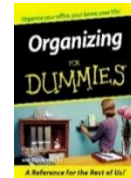Everything in its Place®

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Author Bio and Copyright

Everything in its Place®

Eileen Roth
Your Tour Guide for Success

Mini bio

As the author of *Organizing For Dummies®,* Eileen Roth demonstrates how to be more productive, reduce your stress, and save time and money so you can enjoy your life.

She named her company Everything in its Place® because she truly believes that you can find a place for everything. Eileen is a national speaker, trainer and productivity expert in the areas of: Office Organization   Time Management   Home Organization.

She has appeared on the:
Today Show, Oprah, Fast Company, ASTD's Training & Development (now ATD), Office Pro Successful Meetings, Self, Real Simple, Woman's Day, Men's Health, Chicago Tribune, LA Times, Washington Post, etc.

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How to Create Your Checklist for a Bundle or Giveaway

Have you ever wondered if you downloaded an item from a bundle or giveaway?
Do you know if you were going to get an email to get the download link?
Did you actually download the item?

This Checklist for a Bundle or Giveaway will help you know what items you have downloaded.
Even though it's a spreadsheet, you are not going to do any calculations so it's just like typing into a table.

If you receive a list from the Host, with items or pictures of the gifts, you could use the ideas in this report to write on that list.   So even though you would not need this form for a particular bundle or giveaway, read through it to use the ideas on the host's form. Plus you will want to use this form when you don't receive a list from the host.

Spreadsheet Basics

If you've never even used a table in Word, then just open an Excel or Google Sheets document for practice and type into a box.   You will notice that the functions are similar to Word. Open a new spreadsheet and practice.

Hit **TAB (or arrow keys)**   to move across a line
Hit **Enter (or arrow keys)**   to move down a specific column

This form is created in Excel as an **Excel template**.
Since I do not use Google Sheets, a **regular Excel file** is included that can be opened in Google Sheets. I don't know if the template can be opened in Google Sheets.

Notice that row 1 is in "**View > Freeze"** position so that as you go down the page,
Row 1 titles stay on your screen even if you're in line 54 (page 2).

1. First things first. File this document.

 Keep the original as a form for every giveaway or bundle you buy. This can be filled in on the computer or handwritten. I suggest typing as then it can be alphabetized or searched and is easier to read.

Create a new File Folder called Bundles – Giveaways and put this original list in that file folder.
The reason I do not separate these two is because one person may offer both bundles and giveaways.

Then make subfolders by host name to hold all bundles or giveaways during the year.
See #2 for naming format.

2. Document Name Format
Open the Checklist for a Bundle or Giveaway and choose **File > Save As_____** to change the name of the document. Rename the document to the name of the bundle or giveaway including the year, month, bundle or giveaway name and host because some people do more than one in a year.

> i.e. 2022 March - Spring Giveaway – Jane Smith

If you are using this form, it is already set to put a title on the spreadsheet as the name of the file. (**Page Layout > Print Titles > Header**).

3. Coupon Code / Expires Date
In the top line where it says Item add the Coupon Code, if there is one, to get the items.   Then it will always be there for you. Be sure to pay attention to caps vs. lower case letters. In some programs it doesn't matter, but in others it makes a difference when you add the coupon code.

If you know when the giveaway or bundle expires for you to download items, add the date here. You might want to also add it to your calendar at least a week ahead of the deadline date so you can get the items you want. You do not need to download every item, just the ones you think you will use in the future – for business or personal.

4. Web link
In line 2 *(line numbers are on far left side)* under the Item column, fill in the link to get to the giveaway or bundle. Don't worry if it extends longer than the Item column. Nothing else goes on this line. Another time saver. We are keeping all the key information on this list.

5. Items
If the host of the giveaway or bundle gives you a list of the items in Word, copy them into the form and drop them into the Items column. If they don't, you can make your own list.
It's okay if the information is listed all on one line like this in Word:

> Ex: Sally Jones   Start a Garden $27 value

Copy the whole line and put it under the Item column. (Control +C to copy). If you have a list of items, you can usually copy the entire list at one time into the spreadsheet. They will fall into separate lines. *(see below for a tip on how to separate names).*

If the list matches the same order as the webpage from which to download, leave the list in that order. You can alphabetize by name when you are done downloading.

> *If it doesn't match, alphabetize the spreadsheet by name or item*
> > *(after you do #6 and #7)*
> *to make it easier to note which items you requested.*

6. First and Last Names separated

The reason to separate the name into first and last is because you can then go back and alphabetize easily by last name:

a. in case you ever want to search the list in the future

b. to alphabetize if the list you received does not match the webpage to download.

c. easier to copy items in alphabetical order by author into an Inventory List.

It's easy to move the name into the First and Last columns from the Item column.

Highlight the name

Control X = removes the name from the Item column

Control V = pastes it into the Name column.

 It's two steps any way you do it.

a. You could move both names at once into the First Name column
    and then move the last name into the Last Name column.

b. Remove first and last names separately from the Item column to the Name column.

c. Just type the first and last names and then remove all other words **before and after** the product name **after** you have the information you want to keep (#6 and #7)
        (usual layout is name, maybe company name, product name, value.)

Tip: If no name is given, use the company name until you find out that person's name.

7. Value

Use this column to see what people value an item to give you an idea of what you might value your freebie.

If the value price is included with the Item name, move that number from the Item column into the Value column. You can follow below or just type the number into the value box and remove all text after the product name.

Highlight the value

Control X removes the number from the Item column

Control V pastes it into the Value column

Or just type the number into the value column

After you have removed the name and the value, from the item column, you can delete any excess words from before and after the product name in the Item column.

8. Want   (*optional column*)

You may want to skim the list of items and put a "w" here for items you are interested in. A "w" is easier than a checkmark for typing, but a checkmark works if you are doing this by hand.

> *Tip: Move items you already own or do not want at all to the bottom of the list after you skip a line or two from the items you want.*

9. Email

Mark this column as "EM" or "em" when the person is going to email the item to you. Once you receive the email and download it, mark the "dl" column.

> *Tip: Using "EM" or "em" vs. an "x" makes sure you know you are in the EMAIL column than Want or DL.*

10. Download – Course - Canva – Google Drive

Write "DL" or "dl" here after you download the item.

> *Tip: Using "DL" or "dl" vs. an "X" makes sure you know you did download it.*

If the download is straight into Canva (templates or graphics) or Google Drive use these in the download column:

> Cnv for Canva   (*Do not use "C" as that might mean Copy or C drive, etc.*)
> GDr for Google Drive

> *Tip: Download directly into the Download Folder to quickly download items in one place. Then move them to the computer or external hard drive, often in batches, than moving them one at a time. i.e. move all planners into planners.*

If the item is a course and there is no download, you might want to write course. It is "crs" under the download column. Your weblink will tell you where the course actually is.

11. Upsells and Upsell Cost

Upsells are items offered for sale after you download an item. If you are offered an upsell and buy it, add the name Upsell column and the cost in the Upsell Cost column.

Conclusion

You now have a list of all the products you received during the giveaway and bundle.
Now it's time to use them. Choose one for your next project.