LoftyBiz One-Page List-Tool Setup Sheet

Companion download for LoftyBiz 185 — Email and Message Tools: Set Up a List the Right Way

Choose or confirm one list tool, connect your sign-up form, and send from a domain you own. Keep promotions and service messages in separate, clearly labelled streams, and make leaving easy. Do not buy a list, and do not add a second tool until this one is clean.

Your week: one tool, one test, two streams

Step	What to do
1	Choose or confirm one list tool you can log into, export from, and understand.
2	Connect your sign-up form so new names land in that tool, not in a private inbox.
3	Test the form with two of your own addresses. Fix a missing name or a failed welcome note before you promote it.
4	Send a test from your own domain after you complete the tool's authentication steps.
5	Label a promotions stream and a service stream, and honour a leave request the day you see it.

Setup notes

Item	Write this
Tool brief	Three lines: what you collect, what you send, how often. Nothing more.
Form test	Two addresses you own. Did the name appear? Did the welcome note arrive? Is the leave path clear?
Sending address	An address on your own domain, with a human name people recognise. Authentication steps finished.
Two streams	Promotions: news and offers, clearly marked. Service: reminders of something already booked, short and factual.
Bounce rule	Check the address once, then stop. Do not guess a second spelling.
Quarterly check (example)	Export a backup, remove addresses that asked to leave, and check old automations are not still sending.
One way in	Add names only through the form. Never paste the list into a shared spreadsheet.

Jun in Milwaukee (example only)

Jun runs a ceramics shop in Milwaukee. After a missed firing date, she chose one list tool and connected the site form, so each new name appeared in one place with the date and the box they had ticked. She tested with two addresses she owned, sent from the shop domain, and split promotions from booking reminders. These are examples, not promises.

Callum in Reno (example only)

Callum runs a hiking-tour desk in Reno. He connected the booking form so walkers joined the service list for their tour, and joined the news list only if they asked. He sent from the tour domain with a human name, checked a bounced address once and then stopped, and in this example ran a quarterly tidy. These are examples, not promises.

Example figures, not targets or forecasts. General education, not financial, legal or tax advice. Results vary. These are examples, not promises. Settings in the video: Milwaukee and Reno, USA. No currency amounts. Systex is our own product. You can find Systex at loftybiz.net. Click the link in the description.