

Easier^{WITH} Bee

CUSTOMER GUIDE

The Shared Christmas Plan

Private Christmas planning and shared family jobs

Love Christmas. Share the load.

Begin small

Start with one gift, one cost and one complete family job. You do not need to fill every tab today.

01 YOUR FIRST 15 MINUTES

Your first 15 minutes

A gentle start is more useful than trying to complete the whole system at once.



1

Make your own copies

Create one private organiser and one separate family jobs board.

2

Set your budget

Add the year, household names and what matters most.

3

Capture something real

Add one gift and its cost, then write down three thoughts.

4

Hand over one whole job

Give someone the owner, deadline, instructions and finish standard.

02 TWO FILES, TWO PURPOSES

Two files, two purposes

The separation is deliberate. It protects surprises while giving other people enough information to help.

PRIVATE ORGANISER

Gifts, money, personal notes, dates, hosting and reset. Keep access restricted to you.

FAMILY JOBS BOARD

Only shared jobs and safe instructions. Everyone with access can see everything in this file.

Keep surprises private

Never place gifts, prices, hiding places or the private organiser link in the family board.

Make the files your own

- Open each copy link while signed into your personal Google account.
- Make a separate copy of each file and rename them clearly.
- Keep the private organiser outside shared folders with General access set to Restricted.
- Share the family board only with named trusted editors.

If you use the Excel recovery files

Upload each file separately. Open it with Google Sheets, choose File and Save as Google Sheets, then review sharing and formula warnings. Keep the original downloads as clean recovery copies.

Warm cream cells take your entries. Pale green cells calculate or display saved details. A blank amount is different from £0, so enter 0 deliberately when something is free.

03 KEEP EACH GIFT TOGETHER

Keep each gift together

Use the full list for editing and Gift card when you want to focus on one present.

5	Choose gift ID	G001 ▼
6		
7	Recipient	Mum
8	Gift	Soft green scarf
9	Order	Delivered
10	Wrapping	To wrap
11	Delivery due	15 Dec 2026
12	Owner	Alex
13	Hiding place	Top wardrobe box
14	Shop or link	Local shop

1

Add the gift

Record the recipient, idea, order status, wrapping, owner and hiding place where useful.

2

Record the cost once

Use Money simple first. For linked gift costs, use the optional full Money ledger instead. Never enter a cost on both tabs.

3

Use Gift card for focus

Choose a Gift ID to read the whole record vertically. Edit the original Gifts or Money row.

Returns need two updates

Use Return pending on Gifts while you resolve the return. Update Money separately when the seller releases the balance. Returned on Gifts does not change the money record.

04 SEE THE REAL MONEY PICTURE

See the real money picture

Start with Money simple. It shows planned, paid and still owed. Enter each cost once, with 0 for a zero amount. Paid is money actually paid less refunds already received. Still owed is the remaining amount you must pay. Update these amounts when a balance is released or a refund arrives. A pending refund is not available cash. The separate Money tab retains the full ledger as optional detail for commitments, gift links, cancellations and refunds.

	A	B	C	D
1	EASIER WITH BEE			
2	Your simple money picture			
3				
4				
5	Record each cost once, here or in the optional full Money ledger. Paid means money actually paid, less refunds received. Still owed means the remaining amount you must pay. Pending refunds are not available cash.			
6				
7	Cost	Planned £	Paid £	Still owed £
8	Example cost		100	30
9				70
10				
11				

PAID

The total paid before refunds.

REFUND RECEIVED

Money that has actually returned to you.

REFUND EXPECTED

The full approved refund, including any amount already received.

STILL OWED

The remaining amount due on a committed purchase.

Do not spend pending refunds

Expected after refunds is useful for planning, but a pending refund is not cash available.

A £90 purchase fully refunded shows £0 net spent. A £90 purchase with a £10 refund shows £80 net spent. A £30 deposit on a £100 order leaves £70 to pay.

Choose Cancelled or Returned in Money only after the remaining balance has been released. Any money the seller keeps stays in Paid. Fix highlighted rows before relying on an incomplete total.

05 HAND OVER THE WHOLE JOB

Hand over the whole job

Choose one of eighteen common jobs or write your own. Agree the owner, deadline, instructions, finish standard and allowance. Copy the single handover cell on Job card and paste it into your usual messaging app. Keep the family board as the shared record.

	A	B	C	D	E	F																				
1	EASIER WITH BEE																									
2	One family job																									
3	Choose a job ID to read the full brief without scrolling sideways.																									
4																										
5	Choose job ID: 2001																									
6																										
7	<table border="1"> <thead> <tr> <th>Job</th> <th>Check wrapping supplies</th> </tr> </thead> <tbody> <tr> <td>Owner</td> <td>Sam</td> </tr> <tr> <td>Status</td> <td>To accept</td> </tr> <tr> <td>Due date</td> <td>20 Dec 2026</td> </tr> <tr> <td>Instructions</td> <td>Check paper, tape, tags and ribbon. List only what is missing.</td> </tr> <tr> <td>Done when</td> <td>Existing supplies checked and missing items listed.</td> </tr> <tr> <td>Allowance</td> <td>£0.00</td> </tr> <tr> <td>Update or blocker</td> <td></td> </tr> <tr> <td>Supplies or link</td> <td></td> </tr> <tr> <td>Attention</td> <td>Owner to accept</td> </tr> </tbody> </table>						Job	Check wrapping supplies	Owner	Sam	Status	To accept	Due date	20 Dec 2026	Instructions	Check paper, tape, tags and ribbon. List only what is missing.	Done when	Existing supplies checked and missing items listed.	Allowance	£0.00	Update or blocker		Supplies or link		Attention	Owner to accept
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17																										
18	Copy and send																									
19																										
20	Job: Check wrapping supplies Owner: Sam Deadline: 20 December 2026 What needs doing: Check paper, tape, tags and ribbon. List only what is missing. Finished looks like: Existing supplies checked and missing items listed. Allowance: £0.00																									
21																										
22																										
23																										
24																										
25																										
26																										
27	Copy this one cell and paste into WhatsApp or any messaging app. Ask the owner to accept. Keep status and blockers on the family board.																									
28																										

1

Write the result

Name the job and describe what finished looks like.

2

Give ownership

Choose the owner, deadline and any instructions they need.

3

Let the owner update it

Use Accepted, In progress, Blocked or Done. Add a short blocker note when needed.

For private gift jobs

Share only safe instructions, such as collecting a sealed parcel with a code sent separately. Keep the gift, price and hiding place private.

Edit the original Jobs row to make changes. The copied message contains only the job brief and allowance. It has no phone number or private organiser link. The board does not send automatic notifications, so agree how your household will check it.

06 MAKE ROOM FOR DATES AND HOSTING

Make room for dates and hosting

Keep the occasion visible without turning every event into another mental list.

	A	B	C	D	E	F	G
1							
2	Christmas calendar						
3	Change the month number. Every event comes from Dates. Complete events stay visible.						
4							
5	Month	12		Year	2026		
6							
7	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8			1	2	3	4	5
9							
10	7	8	9	10	11	12	13
11							
12	14	15	16	17	18	19	20
13			School performance				
14	21	22	23	24	25	26	27
15				Christmas dinner Plus 1 more			
16	28	29	30	31			
17							
18							
19							
20							

Dates and Calendar

Dates holds the event and the preparation needed for it. Keep Event status and Prep status separate. Calendar reads that list and gives you a month view. Use your normal phone calendar for reminders.

Hosting, Guests and Dinner

Give every occasion an ID on Hosting, then choose the same ID on Guests and Dinner. Include your own household in Guests and use 0 when there are no adults or children. Only Coming responses count.

Dinner holds dishes and practical jobs with timing, equipment and a finish standard. Record costs on Money, then share suitable jobs in the family board.

One useful distinction

Preparing tickets can be complete while the event itself is still ahead. Separating those statuses keeps the calendar honest.

07 RESET WITHOUT CARRYING CLUTTER

Reset without carrying clutter

Keep only the information that will make next Christmas easier.

**KEEP**

Storage place, quantity, useful inventory and lessons worth repeating.

CLEAR

Returns, donations and anything that no longer deserves space.

Record any refund actually received on Money as well as the return on Reset. Next year, keep this year's private record and begin with fresh copies. Change the year on Setup, then bring across only the useful inventory and lessons.

Dates do not move automatically

Changing the year on Setup does not move existing event dates. Review them before reusing a previous file.

08 WHEN SOMETHING NEEDS FIXING

When something needs fixing

Most problems come from being in the wrong copy, editing a calculated cell or leaving a required amount blank.

I cannot edit a cell

Check that you are in your own copy and in a cream input cell. Use Undo if you change a formula accidentally.

A total looks incomplete

Review highlighted Money rows and Missing planned costs on Dashboard. A blank is not automatically zero.

I cannot see the whole row

Use Gift card or Job card, filter the main list, or rotate your phone. A larger screen is better for a long brief.

A name or occasion is missing

Add the person on Setup or Start, or name the occasion on Hosting, then choose it from the list.

I reached the end of a table

Stay within the prepared rows. Entries below the table may not be included. Contact the seller before extending it.

Three short walkthroughs

- Get Started
- Money and Refunds
- Hand Over a Job

For support, reply to your purchase email. Begin with a description or a screenshot with personal details covered. Keep gift information and private household notes out of shared screenshots.

Start with simple money

Start with Money simple. It shows planned, paid and still owed. Enter each cost once, with 0 for a zero amount. Paid is money actually paid less refunds already received. Still owed is the remaining amount you must pay. Update these amounts when a balance is released or a refund arrives. A pending refund is not available cash. The separate Money tab retains the full ledger as optional detail for commitments, gift links, cancellations and refunds.

If you move a cost into the full Money ledger, remove its Money simple row so the dashboard does not count it twice. Complete all three amounts before relying on the totals. The dashboard includes both tabs. Detailed refund tracking remains in the optional ledger.

Select a job, then send one safe brief

Choose a common job in Jobs column A or write your own. The Common jobs tab gives suggested owners and deadlines for eighteen jobs. Instructions and finish standards appear when you select a listed job. Agree the actual owner, due date and allowance. Edit the suggested instructions where needed.

Choose its Job ID on Job card. Copy the single Copy and send cell and paste it into WhatsApp or any messaging app. It includes job, owner, deadline, what needs doing, what finished looks like and any allowance. Ask the owner to accept. Keep the family board as the shared record for acceptance, completion and blockers. The copy cell excludes the supplies link and private organiser information. Check the words you entered before sharing.

The private organiser and family jobs board are separate files. They do not synchronise. You move agreed job information manually. This separation protects gift privacy while keeping the family board a shared record.