



Life Compass

LIFE COMPASS 2.0 · BETA

Getting Started Guide

Everything you need to capture, organize and move forward
on the things that matter, across Family & Fun, Earn, Learn
and Return.

A little direction for your whole life.

Version 2.0 beta · September 2026 · beta.lifecompass.me

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Welcome to Life Compass

Life Compass is a calm, complete place for everything you want to get done, organized around the four areas of a whole life. This guide walks you through every feature of the 2.0 beta, one step at a time.

● How Life Compass works

Most to-do apps give you one long list. Life Compass gives you a **compass**: every project you take on belongs to one of four life areas, each with its own color, so you can see at a glance where your time is going and what's been quietly neglected.

Family & Fun

The people you love, your home, rest and play.

Earn

Your work, business, career and money.

Learn

Courses, reading, skills and growth.

Return

Giving back: service, community and faith.

Your account starts with these four areas already in place. Everything else, your projects, tasks, tags and views, you add as you go.

The rhythm

Life Compass follows a simple loop that keeps your head clear and your lists trustworthy:

Capture

Get every thought out of your head the moment it lands.

Organize

File it into a project, give it a priority and, if it has one, a date.

Plan

See today, the week ahead and what's ready to do.

Do

Check things off. Repeating tasks come back on their own.

Review

Once a week, walk your projects so nothing drifts.

INSPIRED BY THE BEST

If you've used OmniFocus or the Getting Things Done method, much of this will feel familiar: an Inbox, projects that run in order or in any order, defer and due dates, tags, perspectives, reviews and a weekly sweep. Life Compass adds the four-area compass, a clear priority ladder and a warmer, simpler design.

● What's in the 2.0 beta

The beta includes the complete task system. Everything in this guide works today:

- Quick capture, the Inbox and filing

- Folders, projects (parallel, sequential and single-action lists) and subtasks
- Priorities, flags, tags, people and Waiting On
- Defer, due and planned dates, repeating tasks, notes and file attachments
- The Dashboard, Forecast, Flagged, Nearby and custom Perspectives
- Project reviews, the Weekly Sweep, the Compass Rose, Completed and Archive
- Search, keyboard shortcuts and a guided tour
- Works in any modern browser on a computer, tablet or phone

AI briefings, the Moneypenny voice assistant and email, calendar and recording connections are coming later. You'll see a short "coming soon" note where they'll appear. See *What's coming next* at the end of this guide.

GOOD TO KNOW

Life Compass 2.0 is a web app, separate from the free Life Compass daily planner for iPhone and iPad. The two don't share data yet.

This guide describes Life Compass 2.0 (beta) on the web at beta.lifecompass.me, as of September 2026. The beta is improving every week, so a screen may look slightly different from its picture here. AI features aren't part of the beta yet; see "What's coming next."

Getting set up

Creating your account takes about two minutes. You'll need an email address you can check.

● Create your account

- 1 On your computer or phone, go to **beta.lifecompass.me/signup**. (From the sign-in page, choose **Create an account**.)
- 2 Enter your name, your email address and a password of at least 10 characters.
- 3 Check your **Home time zone**. Life Compass fills in your current zone; change it if you live somewhere else. Due dates follow your home zone even when you travel.
- 4 Tick the box to agree to the Terms of Use and Privacy Policy, complete the quick human check, then choose **Create account**.



Create your account

Life Compass keeps your whole life in one calm place: Family & Fun, Earn, Learn and Return.

Your name

1 Alex Morgan

Email

alex.morgan@example.com

Password

..... 2 Show

At least 10 characters.

Home time zone

3 America · Chicago

Due dates follow this zone, even when you travel.

☒ I agree to the Terms of Use and Privacy Policy.

4 ☐ Verify you are human

 CLOUDFLARE
Privacy · Help

Create account

- 1 **Your name** is how Life Compass greets you. You can change it later in Settings.
- 2 **Show** reveals the password as you type, so you can check it.
- 3 **Home time zone** anchors your due dates and the days on your Dashboard and Forecast.
- 4 **Human check.** A quick, private check that keeps automated sign-ups out. Tick the box if it asks.

● Confirm your email

Right after you create your account, Life Compass emails you a 6-digit code. It comes from **no-reply@lifecompass.me** and usually arrives within a minute.

- 1 Open the email titled "123 456 is your Life Compass code" (your code will be different).
- 2 Type the code into the **Check your email** page and choose **Confirm email**. Or simply tap **Confirm my email** in the email.
- 3 That's it: Life Compass opens and you're signed in.

TIP

No email after a few minutes? Check your spam or promotions folder, then choose **send a new code**. Only the newest code works, and each code is good for 24 hours.

482 913 is your Life Compass code

Life Compass <no-reply@lifecompass.me> · to me

LIFE COMPASS

Confirm your email

Hi Alex, welcome to Life Compass. Enter this code to finish creating your account:

482 913

Or confirm with one tap:

Confirm my email

The code and button work for 24 hours. If you didn't create a Life Compass account, you can ignore this email.

Life Compass 2.0 beta · Family & Fun. Earn. Learn. Return.
Questions? Write to benjirichter53@gmail.com.

- 1 Enter the **6-digit code** from the email. Spaces are fine.
- 2 **Send a new code** if the first one expired or didn't arrive.



Check your email

We sent a 6-digit code to alex.morgan@example.com. Enter it below to finish creating your account.

Code

1

4 8 2 9 1 3

Confirm email

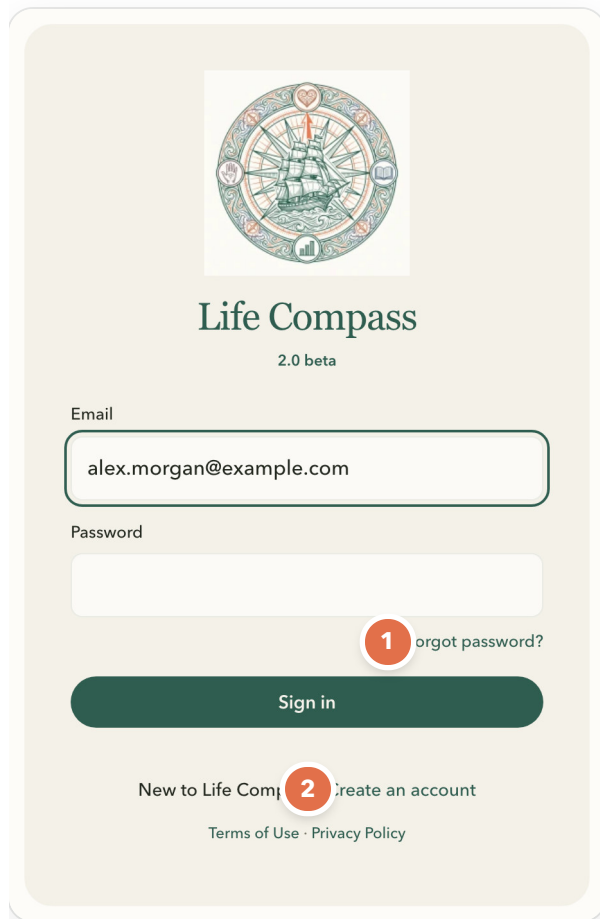
2

Didn't get it? Check your spam folder, or
send a new code

The code works for 24 hours. [Start over](#) · [Sign in](#)

● Signing in and forgotten passwords

Next time, go to **beta.lifecompass.me**, enter your email and password and choose **Sign in**. You stay signed in on that device for a week.

The image shows a sign-in page for 'Life Compass 2.0 beta'. At the top is a circular logo featuring a ship's compass rose with various icons around it. Below the logo, the text 'Life Compass' is displayed in a serif font, with '2.0 beta' underneath in a smaller sans-serif font. The page has two input fields: 'Email' with the placeholder 'alex.morgan@example.com' and 'Password' which is currently empty. To the right of the password field is a red circular icon with the number '1' and the text 'Forgot password?'. Below the input fields is a dark green 'Sign in' button. At the bottom, there is a link for 'New to Life Compass? Create an account' with a red circular icon with the number '2' next to it. At the very bottom, there are links for 'Terms of Use' and 'Privacy Policy'.

1 **Forgot password?** Get a link to choose a new one.

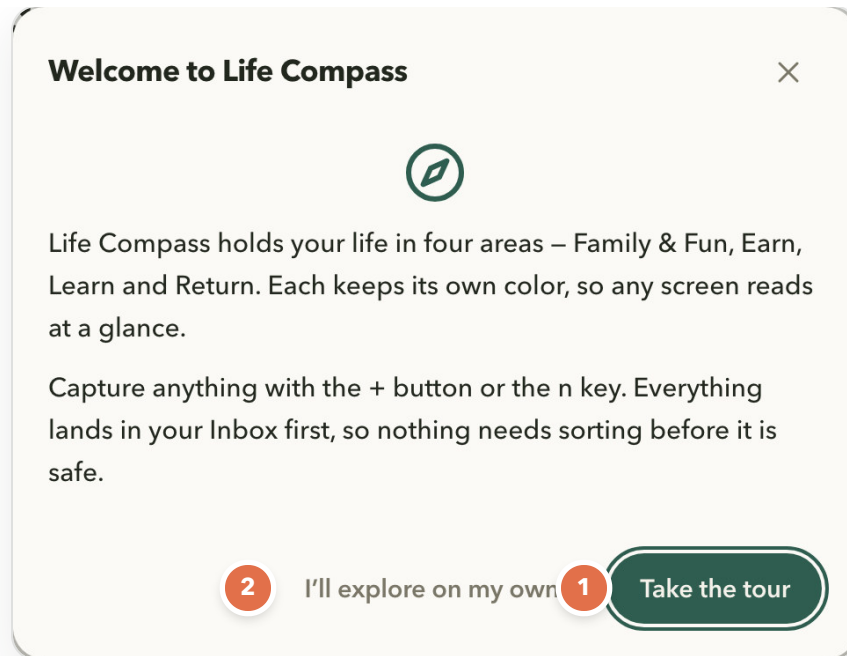
2 **Create an account** if you're new.

If you forget your password

- 1** Choose **Forgot password?** on the sign-in page, enter your email, complete the human check and choose **Send reset link**.
- 2** Open the email "Reset your Life Compass password" and choose **Choose a new password**. The link works once, for one hour.
- 3** Enter your new password twice and save. You're signed in on that device, and any other devices are signed out for safety.

● Your first visit and the guided tour

The first time you open Life Compass, a welcome note offers a short guided tour. The tour moves through the real app and spotlights each part of the screen with a sentence or two. It takes about five minutes, and you can skip it at any point.



1 Take the tour starts the walk-through right away.

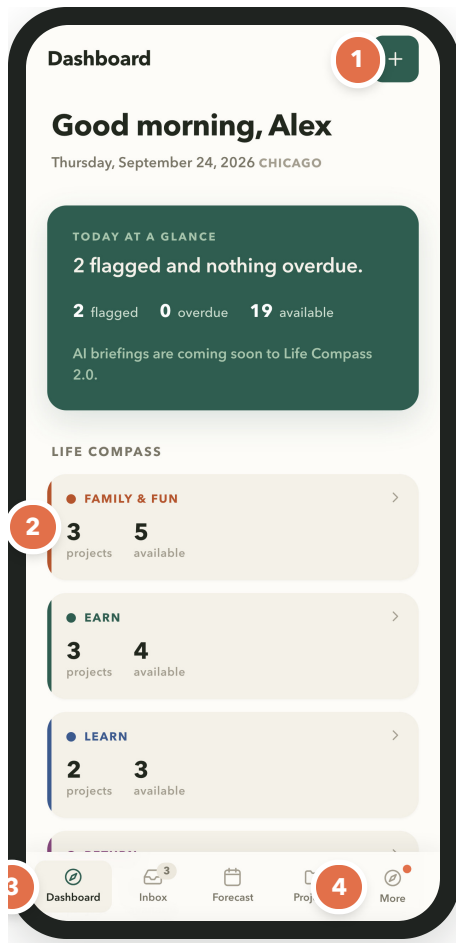
2 I'll explore on my own closes the note. You can start the tour any time from **Tutorial** in the sidebar.

TIP

If the tour is interrupted, open **Tutorial** and choose **Resume the tour**. It remembers the chapters you've seen.

● Life Compass on your phone

Life Compass works in your phone's web browser, with a layout designed for small screens. The sidebar becomes a tab bar along the bottom: **Dashboard**, **Inbox**, **Forecast**, **Projects** and **More**, which opens everything else.



Add Life Compass to your Home Screen so it opens like an app.

iPhone (Safari): tap the Share button, then **Add to Home Screen**.

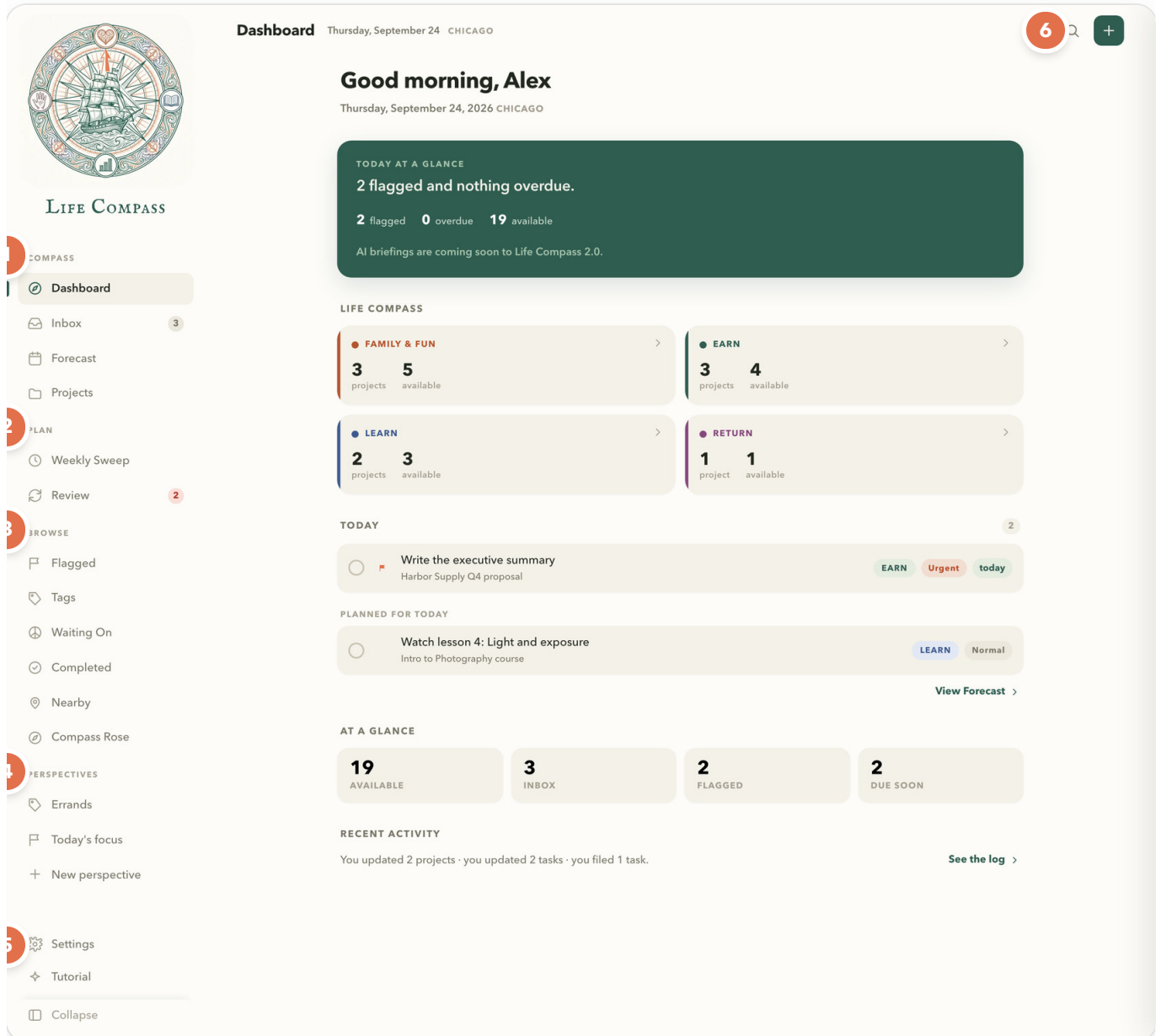
Android (Chrome): tap the : menu, then **Add to Home screen**.

- 1 **New task:** capture from anywhere.
- 2 **Your four areas.** Tap one to see its next steps and projects.
- 3 **Tab bar.** Your most-used screens, one tap away.
- 4 **More** opens every other screen, Settings and the tour.

Finding your way around

Every screen shares the same frame: a sidebar for moving around, a top bar for searching and capturing, and your work in the middle.

● The main screen

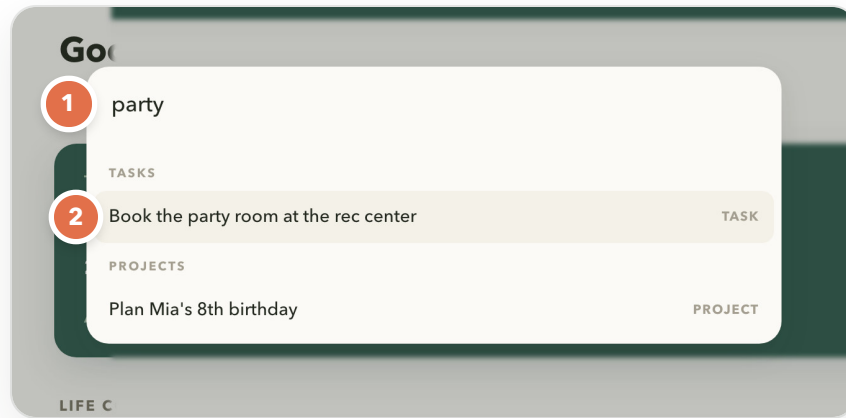


- 1 Compass:** Dashboard, Inbox, Forecast and Projects, where you'll spend most of your time.
- 2 Plan:** Weekly Sweep and Review, for keeping your system current.
- 3 Browse:** Flagged, Tags, Waiting On, Completed, Nearby and the Compass Rose.
- 4 Perspectives:** your own saved views, plus **New perspective**.
- 5 Settings** and the **Tutorial** live at the bottom. **Collapse** folds the sidebar to icons.
- 6 Search** finds any task or project. **New task** opens Quick capture.

Numbers next to **Inbox** and **Review** tell you how many items are waiting there. Press **[I]** to fold or unfold the sidebar.

● Search and keyboard shortcuts

Press **/** (or click the magnifying glass) to search. Results are grouped into Tasks and Projects as you type. Use **↑** **↓** to move and **Enter** to open; **Esc** closes the search.



- 1 Type any part of a task or project name. 2 Choose a result to open it.

PRESS	TO
n	Open Quick capture (new task)
/	Search
g then i	Go to the Inbox
g then f	Go to Forecast
g then p	Go to Projects
[	Fold or unfold the sidebar
Esc	Close a panel, menu or the task details
← →	Move between stations in the Weekly Sweep

GOOD TO KNOW

Shortcuts are paused while you're typing in a box, so pressing **n** in a note just types an **n**.

Capturing and organizing

Getting things out of your head and into the right place is the heart of Life Compass. Capture fast; organize when you have a moment.

● Capture anything

Whenever something occurs to you, press **n** or choose the **+** button at the top of any screen. Type what needs doing and press **Enter**. That's all it takes: the task lands in your Inbox, where it waits safely until you decide where it belongs.

When you have a moment, the same box can do more:

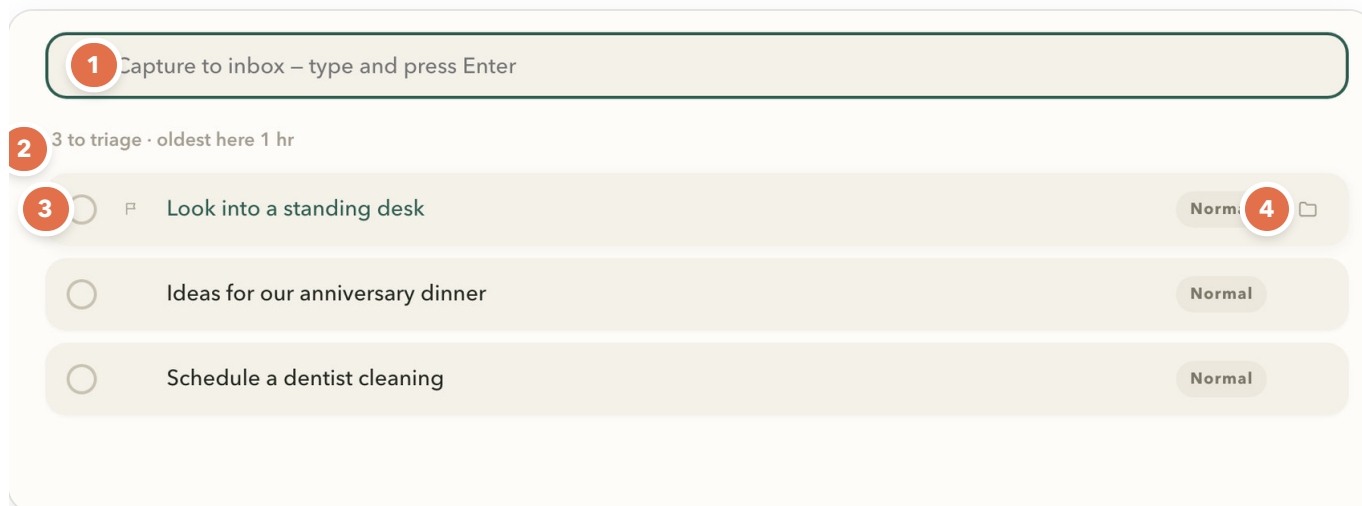
- 1 **Task:** what needs doing. Start with a verb: "Call...", "Book...", "Draft...".
- 2 **Project:** leave it as Inbox, or file it now. Type "Folder : New name" to create a new project on the spot.
- 3 **Due date,** and **Flag as critical** for anything that must happen within 24 hours.
- 4 **Tags:** the priority (Urgent, Normal or Low) plus any other tags. Type a new name to create a tag.
- 5 **Add note** or **Attach files** (up to 1 MB each).
- 6 **Add task** saves it. Press Enter in the Task box to save straight away.

TIP

Capture now, sort later. The Inbox is designed to be a quick drop-off point, so don't let organizing slow you down.

● The Inbox

The Inbox holds everything you've captured but haven't filed yet. Emptying it regularly ("processing" it) is how you keep your lists trustworthy.



1 Capture box: type and press Enter to add more. The cursor stays put so you can keep going.

2 How many are waiting and how long the oldest has been here.

3 Check circle: done already? Check it off.

4 File to a project: send the task to its project (or create one).

Processing your Inbox

For each item, ask: *What is it, and what's the next step?*

- If it takes less than two minutes, just do it and check it off.
- If it belongs to a project, use **File to a project**. Click the task's name to open its details and add a priority or date.
- If it isn't worth doing, open it and choose Drop or Delete.

TIP

Drag tasks up and down to reorder them. "Inbox zero" means everything has a home, which is the quiet signal that you're current.

● Folders and projects

A **project** is any outcome that takes more than one step: planning a birthday, a client proposal, a course. **Folders** hold projects. Your four area folders (Family & Fun, Earn, Learn and Return) are the top of your compass, and you can add folders inside them, such as “Home” under Family & Fun.

Projects
9 active projects · none stalled

Search projects and folders

ALL 10 ACTIVE 9 STALLED 0 ON HOLD 1 DONE 0 DROPPED 0

ALL AREAS 1 FAMILY & FUN 2 EARN 3 LEARN 4 RETURN

1 FAMILY & FUN 3

4 → Plan Mia's 8th birthday 5 ...

Family beach weekend review due 1

HOME 1 ...

Household 3

2 EARN 3

→ Harbor Supply Q4 proposal 1

Refresh my portfolio website review due 2

Work admin 2

- 1 **New folder** and **New project**.
- 2 **Filter by status:** All, Active, Stalled, On hold, Done or Dropped.
- 3 **Filter by area**, or search by name.
- 4 **Project type** icon, then how many tasks are available or waiting.
- 5 **... menu:** rename, move to another folder, convert or delete.

Create a project

- 1 Choose **New project**.
- 2 Give it a name that describes the finished outcome, such as “Plan Mia’s 8th birthday.”

- 3 Pick its **Folder** (which sets its area) and its **Type**.
- 4 Choose **Create project**, then open it to add tasks.

Choose the right project type

TYPE	USE IT WHEN	EXAMPLE
Parallel	The tasks can be done in any order. Every task is available.	Family beach weekend
Sequential	Each step depends on the one before it. Only the first open task is available.	Plan a birthday: pick a theme → book the room → send invitations
Single actions	It's a bucket of unrelated to-dos, with no end.	Household, Work admin

GOOD TO KNOW

A **stalled** project is an active project with nothing available to do and nothing it's waiting on. The Dashboard, Projects and the Weekly Sweep point these out so you can add a next step.

● Inside a project

Projects > **FAMILY & FUN** > Plan Mia's 8th birthday

1 Plan Mia's 8th birthday

TYPE
 Sequential – one at a time

FLAG
☐ Flag as critical

2 **DEFER UNTIL**
 not deferred
No date

DUE
 2026-10-11
Sunday, October 11 · 5:00 PM

STATUS
 ACTIVE live work

3 Mark complete
 Put on hold
 Drop
 Delete project

4 Review every 2 weeks · next Oct 8
 Mark reviewed

NOTE
5 Theme: outer space. Budget \$300. Party on Saturday the 11th.

TASKS

☐ **6** Book the party room at the rec center
 FAMILY Urgent Sat

☐ Send the invitations
 FAMILY Normal Oct 11

☐ Order the cake
 FAMILY Normal Oct 4

☐ Buy goody-bag supplies
 FAMILY Normal Oct 11

+ Add a task...

Show completed

- 1 Name** (click to rename), **Type** and **Flag**.
- 2 Defer until** and **Due** dates for the whole project.
- 3 Status:** Mark complete, Put on hold or Drop.
- 4 Review** schedule. **Mark reviewed** sets the next date.
- 5 Note** for anything worth remembering. It saves as you type.
- 6 Tasks:** drag to reorder, add with **Add a task...**, and show or hide completed ones.

Greyed-out tasks aren't available yet. Hover over one to see why: it might be waiting on the step above it, deferred until later, or in a project that's on hold.

STATUS	MEANING
Active	Live work that you intend to move forward.
On hold	Still real, but paused. Its tasks stop asking for attention.
Done	Finished. Completing a project completes its remaining tasks.
Dropped	No longer worth doing. It stays on record but leaves your lists.

TIP

Adding a task to a finished or dropped project asks whether to bring the project back, so nothing ends up hidden by accident.

● The task details panel

Click any task's name to open its details on the right. Everything you set here saves automatically; press Esc or click outside the panel to close it.

The screenshot shows the 'DETAILS' panel for a task. It includes a 'Complete' toggle (1), a 'Flagged' button (2), the task name 'Book the party room at the rec center' (3), a 'FAMILY' tag (4), a 'PROJECT' dropdown 'Plan Mia's 8th birthday' (5), a 'PRIORITY' section with 'Urgent', 'Normal', and 'Low' options (6), a descriptive text for priority (7), a 'TAGS' section with 'Phone calls' and a '+ Tag' button (8), a 'DEFER UNTIL' date field (9), a 'DUE' date field (10), a 'PLANNED' date field (11), an 'ESTIMATED MINUTES' field (12), a 'REPEAT' dropdown (13), a 'NOTE' text area (14), and an 'ATTACHMENTS' section (15).

- 1 **Complete** and **Flag**.
- 3 **Project**: move it, or leave it in the Inbox.
- 5 **Tags**. Choose **+ Tag** to add one; type a new name to create it.
- 7 **Estimated minutes** for planning your time.
- 9 **Note**: details, links or instructions.
- 2 **Name**. Click to edit.
- 4 **Priority**: Urgent, Normal or Low.
- 6 **Dates**: Defer until, Due and Planned.
- 8 **Repeat** for anything that comes around again.
- 10 **Attachments**: files up to 1 MB each.

- **Subtasks** (below the panel's attachments): break a task into steps with **Add subtask**, and choose whether they run in order (Sequential) or in any order (Parallel).

- **Drop** removes the task from your lists but keeps it on record. **Delete** removes it for good.

● Priorities and flags

Every task has exactly one priority. Priority measures **consequence**: what happens if it slips. It's never about *when*; that's what dates are for.

Low

A rubber ball. If you drop it, it bounces; nothing breaks.

Normal

The default. Some consequence if it isn't done on time.

Urgent

A glass ball. Dropping it would really cost you.

Flag

A Christmas ornament: it must happen within 24 hours. Rare by design.

A flag sits on top of a priority, so a task can be Urgent *and* flagged. New tasks start as Normal. If a task somehow has no priority, it shows a red "untagged" chip so you can fix it.

TIP

Keep flags rare. If more than five things are flagged, the Weekly Sweep will ask whether they're all really critical today.

● Dates: defer, due and planned

DATE	WHAT IT MEANS	WHAT HAPPENS
Defer until	Don't show me this before...	The task stays hidden from available lists until that date.
Due	This has a real deadline.	It appears in Forecast and Today, and turns red if it's overdue.
Planned	I intend to work on it on this day.	It appears on that day in Forecast and on the Dashboard, without becoming a deadline.

Type dates the way you say them

Every date box understands everyday phrases. Life Compass shows what it understood before you save.

TYPE	YOU GET
today, tomorrow, tonight	Those days (tonight is 8 PM)
fri, next tue, this thursday	The coming weekday
+3d, 2w, +1m	3 days, 2 weeks or a month from today
aug 6, 8/6, 2026-08-06	A specific date
tomorrow 9am, fri 5:30p	A date with a time
next week	Next Monday

GOOD TO KNOW

Due dates without a time use your default due time (5:00 PM unless you change it in Settings). Dates always follow your home time zone, so a 5 PM deadline stays 5 PM at home when you travel.

● Repeating tasks

Open a task's details and use **Repeat** for anything that comes around again: taking out the recycling every Tuesday, changing a filter every three months, practicing a language every day.

REPEAT

1 On a fixed schedule

FREQUENCY

2 Weekly

EVERY

–

1

+

week

ON DAYS

Mo

Tu

We

Th

Fr

Sa

Su

3 Repeats every week on Tue

- 1 **How it repeats:** on a fixed schedule, or again after you complete it.
- 2 **Frequency** and **Every:** daily, weekly, monthly or yearly, every 1, 2, 3... of them.
- 3 **On days** (weekly) or **Day of month** (monthly).
- 4 **A plain-English summary** of the rule.

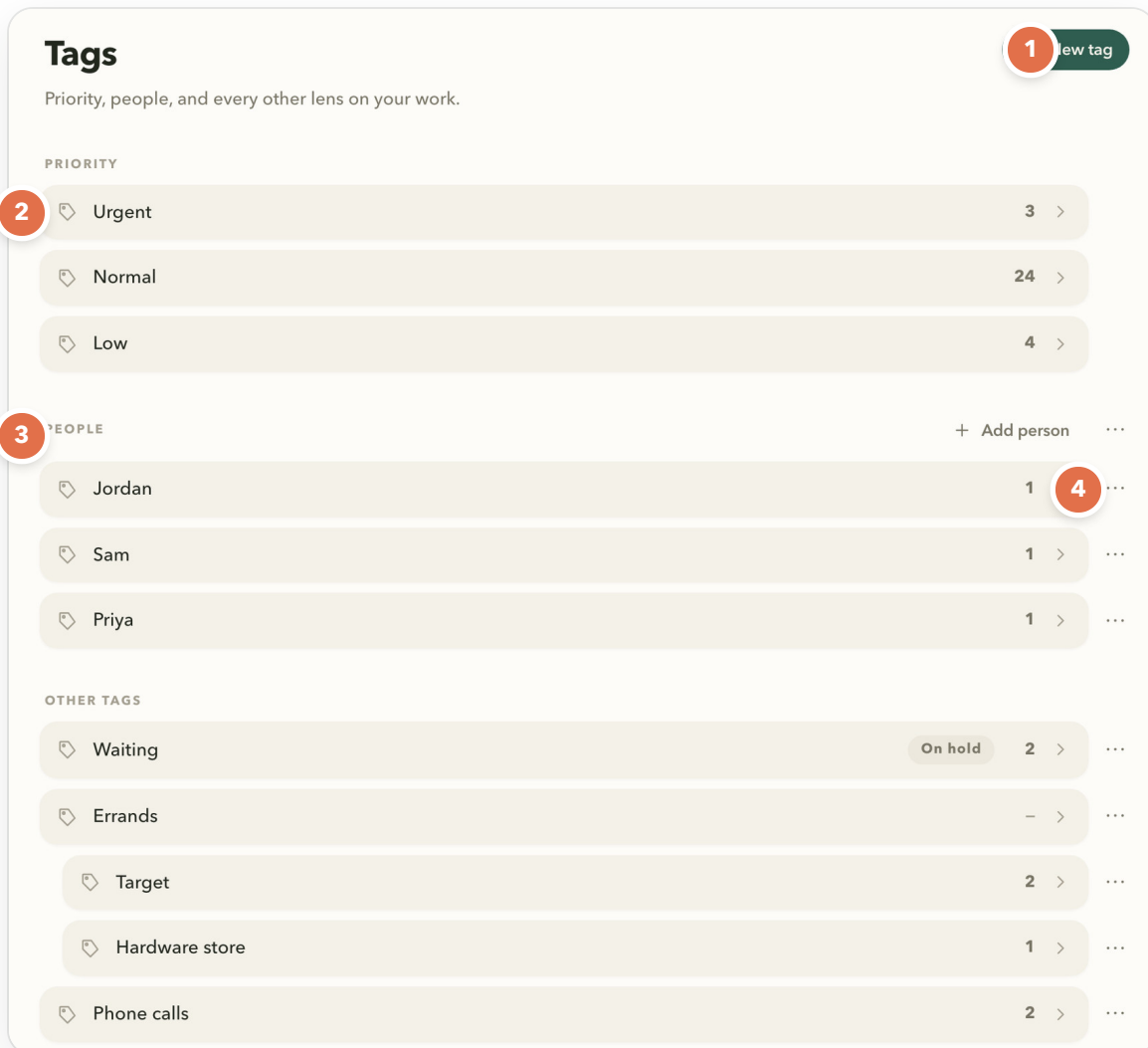
CHOOSE	WHEN	EXAMPLE
On a fixed schedule	It happens on set dates, whenever you finish.	Recycling every Tuesday
Defer again after completion	The next one shouldn't appear until some time after you finish.	Furnace filter, 3 months after the last change
Due again after completion	The next deadline is counted from when you finish.	Water the plants 5 days after the last time

GOOD TO KNOW

A repeating task needs a defer or due date so it has something to reschedule (a daily habit with no dates is the exception). When you check it off, the next one appears automatically and the finished one is kept in Completed.

● Tags, people and Waiting On

Tags describe *how*, *where* or *with whom* a task gets done: "Phone calls," "Errands," a person's name. A task can have as many tags as you like. Tags can be nested, so "Target" can live inside "Errands."



1 New tag: name it and, if you like, put it inside another tag.

3 People: one tag per person you work with or delegate to.

2 Priority tags are built in and can't be renamed or deleted.

4 Tag menu: new tag inside, rename, move, put on hold or delete.

Waiting On: keep track of what others owe you

When you hand something off, tag the task with the person's name *and* **Waiting**. Waiting is on hold by design, so those tasks leave your to-do lists, but they gather on the **Waiting On** screen, one card per person.

Waiting On

+ Add person Print

Delegation radar – who owes you what, and who has gone quiet.

3 people on your radar · 2 waiting on them · 1 to raise.

● **Jordan** · active today

3 Add follow-up

1 WAITING ON THEM



Confirm the beach house dates
Family beach weekend

FAMILY

Normal

● **Priya** · active today

+ Add follow-up

2 TO RAISE WITH THEM



Send the proposal to Priya
Harbor Supply Q4 proposal

EARN

Normal

Sun

● **Sam** · active today

+ Add follow-up

WAITING ON THEM



Get updated pricing from Sam
Harbor Supply Q4 proposal

EARN

Normal

Sun

1 **Waiting on them:** things you've handed off.

2 **To raise with them:** tasks tagged with the person but not Waiting, perfect for your next conversation.

3 **Add follow-up** creates a "Follow up with..." task in one click.

TIP

To add a person, create a tag inside **People** (or use **Add person** on the Waiting On screen). Your account starts with People and Waiting already set up.

Planning your days

Life Compass gives you several ways to look at the same tasks: by area, by day, by what's critical, by place and by any rule you choose.

● The Dashboard

The Dashboard is your morning view: a short heading for the day, your four areas and what's due.

Good morning, Alex
Thursday, September 24, 2026 CHICAGO

TODAY AT A GLANCE
2 flagged and nothing overdue.
2 flagged 0 overdue 19 available
All briefings are coming soon to Life Compass 2.0.

LIFE COMPASS

- FAMILY & FUN**
3 projects 5 available
- EARN**
3 projects 4 available
- LEARN**
2 projects 3 available
- RETURN**
1 project 1 available

TODAY 2

- ☐ Write the executive summary
Harbor Supply Q4 proposal EARN Urgent today

PLANNED FOR TODAY 3

- ☐ Watch lesson 4: Light and exposure
Intro to Photography course LEARN Normal

[View Forecast >](#)

AT A GLANCE

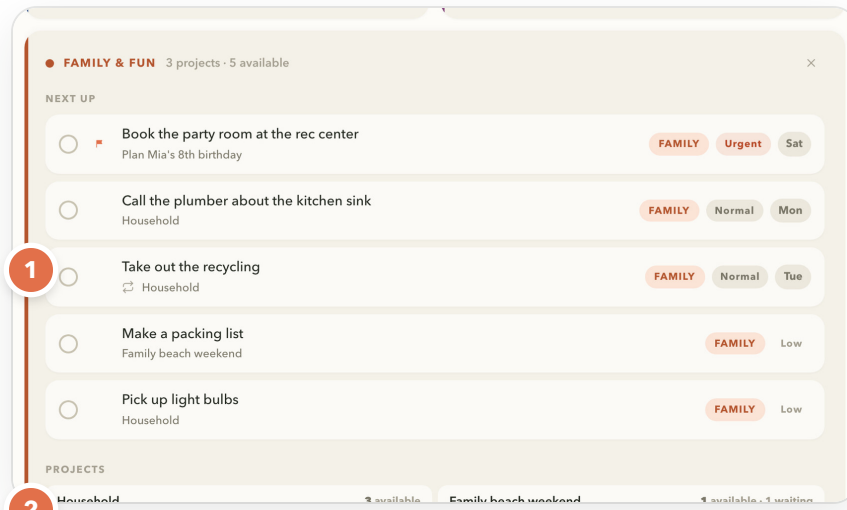
- 19 AVAILABLE
- 3 INBOX
- 2 FLAGGED
- 2 DUE SOON

RECENT ACTIVITY

- 1 Today at a glance:** how many things are flagged, overdue and due.
- 2 Your four areas,** each with its projects, available tasks and anything stalled.
- 3 Today:** overdue and due-today tasks, then tasks planned for today. Check them off right here.
- 4 At a glance:** available, Inbox, flagged and due-soon counts. Click any of them to jump there.

Drill into an area

Click an area tile to open it in place. You'll see any stalled project that needs a next step, the next things to do (five at a time; swipe or use the dots for more) and the area's projects.



1 Next up in this area.

2 Projects in this area with their counts. Click one to open it.

Forecast

Forecast lays out the days ahead: what's overdue, what's due and what you've planned for each day.

The days ahead

Times in **Chicago**

KEY ● Tasks due ● Today · overdue · flagged ● People

<

September 2026

>

S	M	T	W	T	F	S
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

PAST

0

TODAY

1

FRI

25

1

SAT

26

1

SUN

27

2

MON

28

2

TUE

29

1

FUTURE

5

PAST

Overdue

Nothing overdue. You're current.

TODAY

Thursday, September 24

CHICAGO

1 due · 1 planned

3

☐

Write the executive summary
Harbor Supply Q4 proposal

EARN

Urgent

5:00 PM

4

☐

Watch lesson 4: Light and exposure
Intro to Photography course

LEARN

Normal

FRI

Friday, September 25

CHICAGO

1 due · 1 planned

☐

Submit September expense report
Work admin

EARN

Normal

5:00 PM

☐

Choose three case studies
Refresh my portfolio website

EARN

Normal

SAT

Saturday, September 26

CHICAGO

1 due

- Month calendar:** dots show how much is due. Click a day to jump to it.
- Day strip:** Past, Today, the next five days and Future.
- Due** tasks for the day, in time order.
- Planned** tasks: what you intend to work on that day.

TIP

Tasks overdue by more than two weeks ask “Still real?” It’s a nudge to either recommit with a new date or drop them.

● Flagged

Flagged shows every flagged task, grouped by project. A flag means “within 24 hours,” so this is your list of what truly can’t wait. When the list grows past five, Life Compass gently asks whether all of them are real.

● Perspectives: your own views

A perspective is a saved view built from rules, such as “everything tagged Errands that I can do now” or “flagged or due today.” Perspectives appear in the sidebar so your favorite views are always one click away.

- 1 In the sidebar, choose **New perspective**.
- 2 Give it a name.
- 3 Choose whether tasks must match **all** or **any** of your conditions, then add conditions: availability, flagged, a tag, a project, a folder or area, due within some days, text in the name or note, and more.
- 4 Pick how to **Group** and **Sort** the results, then save.

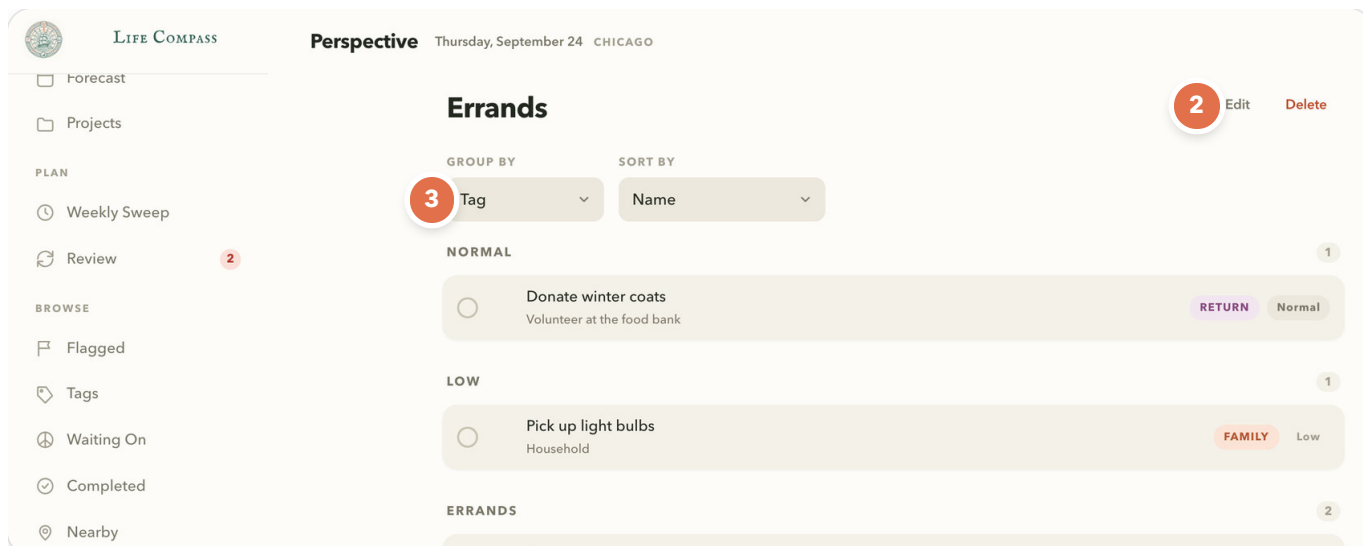
The screenshot shows a 'New perspective' dialog box with the following elements and annotations:

- 1** Points to the 'NAME' field containing 'Quick errands'.
- 2** Points to the 'Show tasks that match' section, specifically the 'all' dropdown menu.
- 3** Points to the 'Has tag' condition, specifically the 'Errands' dropdown menu.
- 4** Points to the 'GROUP BY' section, specifically the 'Tag' dropdown menu.

Other visible elements include:

- A close button (X) in the top right corner.
- A 'Due within' condition set to '7 days'.
- A '+ Add condition' button.
- A 'SORT BY' section with a 'Due' dropdown menu.
- 'Cancel' and 'Create perspective' buttons at the bottom.

- 1 **Name** your perspective.
- 2 **Match all or any** of the conditions.
- 3 **Conditions:** pick a rule and its value. Add as many as you need.
- 4 **Group and sort** the results.



1 Your perspective in the sidebar. 2 Edit or Delete it at any time.

Change the grouping and sorting; your choice is remembered.

IDEAS TO TRY

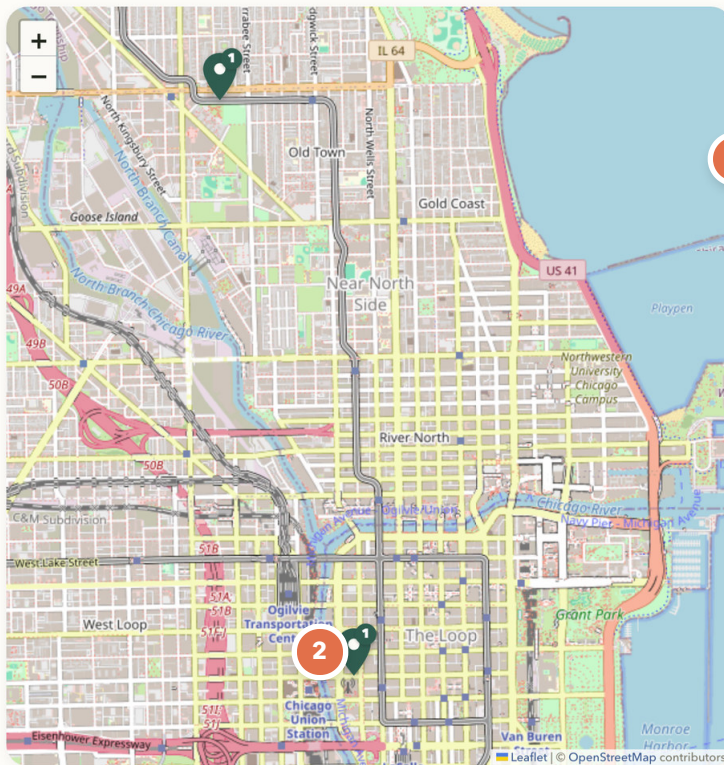
Errands: has tag Errands, available. **Today's focus:** remaining and (flagged, or due within 1 day, or overdue). **Quick wins:** available and the name or note contains "call." **Learn this week:** in folder Learn, due within 7 days.

Nearby

Nearby puts your errands on a map. Give a tag a place, like a store or the post office, and the map shows a pin with how many available tasks are waiting there, plus how far away it is.

Nearby

Your errands, gathered by where they happen.



Errands

Tags with a place on the map

1 Place a tag

Target

Target, State Street 0.5 mi away

1

Donate winter coats
Volunteer at the food bank

RETURN Normal

Hardware store

Hardware store, Clybourn 1.7 mi away

1

Pick up light bulbs
Household

FAMILY Low

- 1 Place a tag to pin one of your tags to a spot on the map.
 - 2 Pins show how many tasks are available at each place.
 - 3 The list of places with distance from where you are.
- 1 Choose **Place a tag** and pick a tag (create one first, such as "Hardware store," if you need to).
 - 2 Click its location on the map, give it a **Location name** and choose **Save pin**.
 - 3 Tag tasks with it. Next time you're nearby, they're waiting for you.

GOOD TO KNOW

Your browser may ask for permission to use your location so it can show distances. The map works without it.

Reviewing and reflecting

A system you trust is a system you review. These tools make it quick.

● Project review

Each project has a review schedule (every two weeks unless you change it). When a project is due, it shows up in **Review**, one at a time, with a short checklist.

The screenshot shows a project review interface for 'Family beach weekend'. At the top left, a list of projects to review is shown, with 'Family beach weekend' marked as '1d overdue' and 'Refresh my portfolio website' also '1d overdue'. The main section is titled 'PROJECT 1 OF 2' and 'FAMILY & FUN'. The project name 'Family beach weekend' is prominently displayed, with an 'Open >' link. Below this, a green box asks 'Is this ship in good shape – the right status, the right dates, a next action ready?'. The main review form is divided into sections: 'THE WALK' (with a red indicator '1 of 7 needs a look'), 'STATUS' (ACTIVE), 'TYPE' (Parallel – any order), 'FLAG' (Not flagged), 'DEFER UNTIL' (not deferred), 'DUE' (no due date), 'REVIEW' (every 2 weeks, never reviewed), and 'NEXT ACTION' (Has one). Below the form, 'OPEN TASKS' are listed: 'Confirm the beach house dates' (tag is on hold), 'Make a packing list' (NEXT ACTION), and 'Check the tire pressure before the drive' (deferred until Oct 8). At the bottom, there are four buttons: 'Mark reviewed' (highlighted with a red circle), 'Put on hold', 'Complete', and 'Drop'. A 'Skip' link is also present.

1 The walk: status, type, flag, dates, review cadence and next action. Anything that needs a look is marked, and you can fix it right here.

3 Mark reviewed when it's in good shape, or put it on hold, complete, drop or skip it.

2 The question to ask of every project: is it in good shape, with a clear next step?

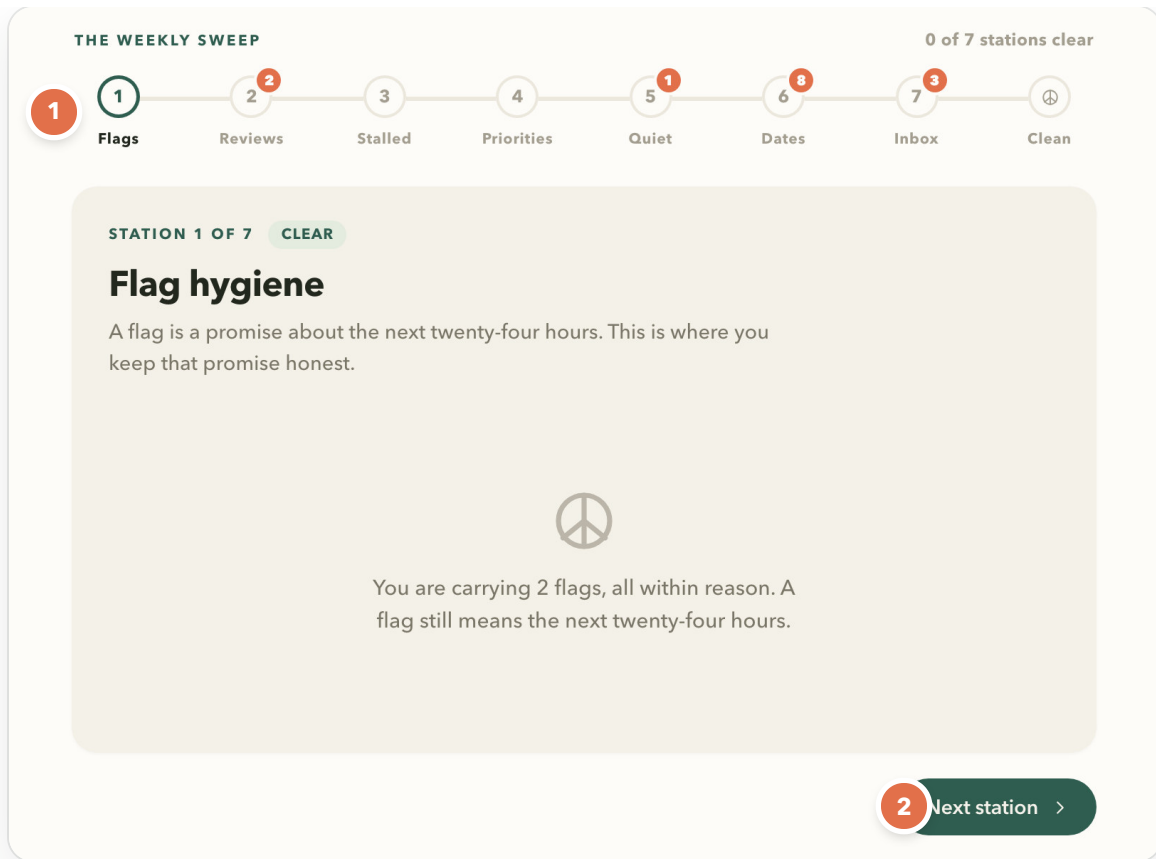
4 The queue of projects due for review.

If a project has no next step, a **Name the next action** box appears so you can add one without leaving the review.

● The Weekly Sweep

Once a week (Friday afternoon or Sunday evening work well), take ten minutes for the **Weekly Sweep**. It walks you through seven quick stations:

STATION	WHAT YOU DO
1. Flag hygiene	Unflag anything that isn't truly critical in the next 24 hours.
2. Reviews due	Walk each project that's due for review.
3. Stalled projects	Give each stalled project a next action, or turn it into a folder.
4. Priority hygiene	Make sure every task has the right priority: U, N or L.
5. Gone quiet	Follow up on things you're waiting on that have gone quiet.
6. Undated tasks	Give important undated tasks a day: Today, Tomorrow, Next week or a date.
7. Inbox	File whatever is still in your Inbox.



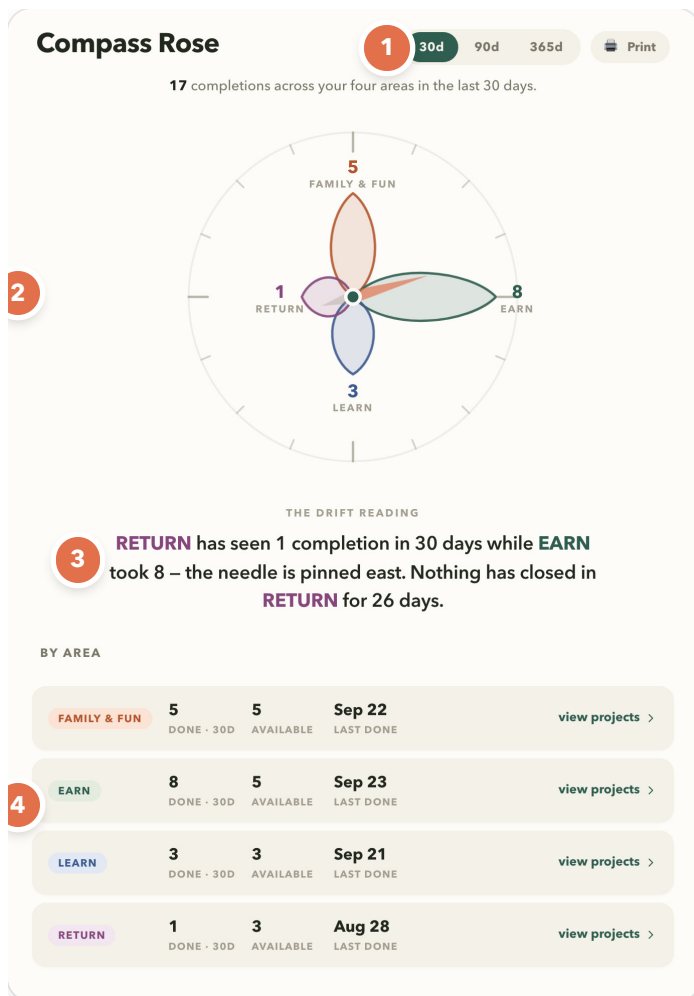
1 **Stations:** your progress through the sweep.

2 **Next station** when this one's done. Your place is saved if you step away.

When you finish, the sweep tells you *"The system is clean."*

● The Compass Rose

The **Compass Rose** shows where your effort has actually gone. Each petal is one area, and its size reflects how many tasks you've completed there.



- 1 Window:** the last 30, 90 or 365 days.
- 2 The rose:** Family & Fun (north), Earn (east), Learn (south) and Return (west).
- 3 The drift reading** names any area that's gone quiet.
- 4 By area:** completions, available tasks and when you last finished something.

USING THE ROSE

A lopsided rose isn't a failure; it's information. If Return hasn't moved in weeks, that's a gentle prompt to schedule one small act of giving back.

Completed and Archive

Completed lists everything you've finished. Search it, filter by area and date range, and sort it however you like. It's satisfying, and handy when someone asks "when did I do that?"

Completed

17 finished items, kept and searchable

1

Completed Archived

2

ALL

FAMILY

EARN

LEARN

RETURN

NO AREA

LAST 7 DAYS

LAST 30 DAYS

LAST 90 DAYS

ALL TIME

CUSTOM

SORT

Newest first

17 items

Completion dates shown in Chicago (this device).

Archive items older than 30 days Nothing is eligible yet.

✓	Draft the scope and timeline Harbor Supply Q4 proposal	EARN	Normal	Sep 23
✓	Pick a theme with Mia Plan Mia's 8th birthday	FAMILY	Normal	Sep 22
✓	Watch lesson 3: Composition Intro to Photography course	LEARN	Normal	Sep 21
✓	Send the invoice to Northwind Work admin	EARN	Normal	Sep 20
✓	Soccer carpool sign-up Household	FAMILY	Normal	Sep 19

1 **Completed** and **Archived** tabs.

2 **Search, area and date filters** and sorting.

On the 1st of each month, completed and dropped items older than 30 days move to **Archived** automatically so your lists stay fast. You can also use **Archive items older than 30 days** at any time, and **Unarchive** brings anything back.

Your account and settings

Make Life Compass yours, and know where your data lives.

● Settings

Settings

Your name, your zones, and your account.

1

Profile

How Life Compass greets you.

YOUR NAME

Alex

2

Account

The account you sign in with.

NAME

Alex Morgan

EMAIL

alex.morgan@example.com

Change password

Sign out

3

Time

Dates follow your home zone; times follow the device you are holding. Your device reads America/Chicago right now.

HOME TIME ZONE

America/Chicago

Dates in Life Compass are shown in this zone. Times follow the device you are holding.

DUE SOON WINDOW

2

How many days ahead a task counts as due soon.

DEFAULT DUE TIME

05:00 PM

The time of day a new due date lands on when you do not set one.

4

Coming soon

Life Compass 2.0 is growing. These arrive in a later update – there is nothing to set up yet.

AI morning & evening briefings

A short read of your day each morning and a calm review each evening, written from your own compass.

Moneypenny, your voice assistant

Talk to Life Compass to capture, find and plan without typing.

Email, calendar & recording connections

Bring what matters from your mail, calendars and meeting recordings into your day, read-only.

- 1

Profile: the name Life Compass greets you with.
- 2

Account: your name and email, **Change password** and **Sign out**.
- 3

Time: your home time zone, how many days count as “due soon,” and the default time for due dates.
- 4

Coming soon: the AI features on their way.

SETTING	WHAT IT DOES
Home time zone	The zone your dates and days follow. Change it if you move, not when you travel.
Due soon window	How many days ahead count as “due soon” (1–30, default 2).
Default due time	The time used when you give a due date without one (default 5:00 PM).

● Password, privacy and your data

Change your password

- 1 Open **Settings** and find **Account**.
- 2 Choose **Change password**, enter your current password and your new one twice, and save.
- 3 Other devices are signed out; this one stays signed in. You'll get an email confirming the change.

Sign out

Settings → **Account** → **Sign out**. Do this on shared or public computers.

Download your data

Settings → **Support and privacy** → **Your data** → **Download workspace data** saves a complete copy of your tasks, projects, folders, tags, perspectives and settings as a file you keep. It's a good habit to download a copy now and then during the beta.

Your privacy

- Your tasks are private to your account. Life Compass doesn't sell your data, show ads or use your content to train AI.
- Life Compass runs on Cloudflare's secure cloud. Your password is stored only as a secure hash.
- To delete your account and its data, email benjirichter53@gmail.com from the address you signed up with.

The full **Privacy Policy** and **Terms of Use** are linked from the sign-in page and from Settings.

Reference

What’s next, quick answers and a glossary.

● What’s coming next

Life Compass 2.0 is growing. These features are in development and will arrive in later beta updates. When one is ready, we’ll explain what it does and what data it uses, and you’ll choose whether to turn it on.

FEATURE	WHAT IT WILL DO
AI morning and evening briefings	A short daily brief that reads your tasks (and, if you connect them, your email, calendar and recordings) and recommends where to focus. Every change it suggests waits for your one-click approval.
Money Penny, your voice assistant	Talk to Life Compass: ask what’s next, capture tasks and move through your day hands-free.
Email, calendar and recording connections	Bring in Google or Microsoft mail and calendars and Plaud recordings, read-only, so your briefings have the full picture.

● Troubleshooting and questions

QUESTION	ANSWER
I didn't get my code or reset email.	Wait a minute, then check spam and promotions. On the confirm page choose "send a new code"; for a reset, request a new link. Only the newest code or link works.
It says my code didn't work.	Make sure you're using the latest email. After five wrong tries a code stops working; send a new one.
A task disappeared from my lists.	It may be deferred, waiting on an earlier step in a sequential project, tagged Waiting or in a project that's on hold. Search for it and open it to see why.
"Your data changed in another tab."	You edited the same item in two places. Refresh the page and make the change again.
The page looks out of date.	Refresh the page. On a phone, pull down to refresh.
Can I use Life Compass offline?	The 2.0 beta needs an internet connection. The free iPhone and iPad planner works fully offline.
How do I delete my account?	Email benjirichter53@gmail.com from your account's address.
How do I get help or share feedback?	Email benjirichter53@gmail.com with what you were doing and what you expected. Please don't include passwords.

● Glossary

TERM	MEANING
Area	One of the four compass points: Family & Fun, Earn, Learn or Return. A project's folder decides its area.
Available	Ready to do now: not deferred, blocked, on hold or waiting.
Defer	Hide a task until a date.
Drop	Set something aside for good while keeping it on record.
Flag	Critical within the next 24 hours.
Inbox	Where new, unfiled tasks wait.
Perspective	A saved view built from rules.
Planned date	The day you intend to work on something (not a deadline).
Priority	Urgent, Normal or Low: the consequence if a task slips.
Review	A regular check that a project is healthy and has a next step.
Sequential / Parallel	Steps in order, or in any order.
Stalled	An active project with nothing available and nothing it's waiting on.
Waiting	A tag for things someone else needs to do first.

Thank you for trying the Life Compass 2.0 beta. Family & Fun. Earn. Learn. Return.