EXECUTIVE / ESTATE

LISZ

Getting started

Their life, handled.

You do not need to set anything up before this is useful. Two things, and you are already ahead of where you were.

START HERE

1. Connect a calendar FIRST - **Clients** tab - open **My life** (there from day one) or any client - **Open workspace** - **Calendars** - **Connect calendars.** Do this before your first **Brain dump:** an event you confirm is placed on that calendar. Without one it stays inside LISZ only.
2. Then your first **Brain dump** - tap the round capture button beside the tabs, then **Brain dump.** One thought per line, tap the **Done** button, then review.

WHO IT IS FOR

Executive assistants, estate managers, chiefs of staff - anyone who runs someone else's life and needs every loose end caught the moment it is said.

WHAT IS IN HERE

Pages 2-3	The two things worth doing first: a calendar, and your first **Brain dump.**
Page 4	Every way into LISZ: the **Capture hub,** and four ways to report an issue.
Pages 5-6	A day on **Today,** and the loop for work you have handed off.
Page 7	**Clients,** the **Dossier,** property briefs and trips in their travel days.
Page 8	**Runs,** one lane at a time, and the **Canvas,** the whole fleet at once.
Page 9	Search and the **command sheet,** and where time and money live.
Page 10	The weekly habit, and a map of the rest of the app.

WHERE TO START

Do not organize. Dump.

Your week arrives faster than you can file it. So do not file it. Get the words down and let LISZ work out what each one is. Your job is to capture, not to sort. One thing comes before the first dump: a connected calendar, so that what you confirm has somewhere to land.

First: connect a calendar

LISZ does not have its own calendar - it reads and writes the ones already on your phone. No separate login, no new password. A Google or other account you have already added in iOS Settings shows up here on its own.

This is not optional for scheduling. Every event you confirm from a review is placed on the client's connected calendar. With none connected, the review warns that the event will not be placed, it lives in LISZ only, nothing reaches your phone's calendar, and "when am I free?" has nothing to read. Connect one for My life, and one per client you add.

> **Where to find it**
>
> **Clients** tab - open **My life** or a client - **Open workspace** - **Calendars** - **Connect calendars.** Tick the calendars that matter, then star the one new events should default to. Thirty seconds. **Open workspace** sits at the top of a client's page; tapping the ring on a client's card opens it too.

> **If Gmail or Outlook calendars are missing from the list**
>
> LISZ can only see calendars your iPhone itself already syncs. Add the account once in the iPhone's own Settings (Settings - Apps - Calendar - Accounts) with **Calendars** turned on - then it appears here like any other.

A note on two devices

Calendars live on the device, not in the cloud copy of your data. So if you use LISZ on both an iPhone and an iPad, tick the calendars once on each. LISZ will ask you to confirm which local calendar it means the first time it is unsure - answer once and it stays answered on that device.

THE ONE HABIT

Your first Brain dump

Tap the round capture button beside the tabs, then **Brain dump.** Type or dictate whatever is in your head, one thought per line, in any order. No fields. No picking a category first. The mic says Tap to dictate.

WHAT YOU TYPE

Call the plumber tomorrow at 9 / Paid the gardener 80 bucks / Dinner with Molly Friday 8pm / Note: gate code is 4421

WHAT YOU GET

A task due tomorrow 9am - an expense for 80.00 - an event Friday 8pm with Molly recognised - a note filed where you will find it.

Tap the **Done** button and the page opens a review. Nothing is filed until you confirm it: capturing and sorting are two different moods.

Events need a connected calendar

An event line is placed on the client's connected calendar when you confirm; with none connected the review says so and it stays in LISZ only. Connect it first (page 2).

The review page

Everything is pre-sorted and pre-filled: a guessed date, a guessed person, a guessed calendar. Each line carries a dot for the type LISZ read it as, and a flag where it was unsure. You are glancing and correcting, not typing. Tap **Confirm all** and it is filed at once - the button says how many. The ... menu holds **Photo capture** and **Guided issue report,** and **Review** N captures while lines wait; the photo button beside Meeting starts a **Photo capture.**

The words that open an issue

Start a line with **test, fix, repair, service, replace, install, inspect, paint** or **adjust** and name a system you have saved, such as the pool heater. It opens as an issue with what, where, who, when and cost filled: Fix the pool heater, Friday, $400. Check and clean do not count; they stay tasks.

EVERY WAY IN

One hub, every way in

The round capture button beside the tabs opens the **Capture hub. Brain dump** is the card at the top and the one to learn first; the rest sit under it. Everything gets the same review, so you never have to decide where something belongs at the moment you capture it.

Brain dump	Type or dictate freely. Handles a meeting's worth of scattered thoughts in one go.
Magic paste	A booking email, a PDF, a photo of an itinerary, or a scan. Dates, names and confirmation numbers are pulled out into a whole trip.
Voice task	Speak one thing. Due dates spoken out loud are understood - "remind me to call mom tomorrow" arrives dated.
Snap receipt	Photograph a receipt, or pick one from your photo library. The merchant, amount and date fill themselves in.
Scan document	Camera to filed record, with an expiry date so it warns you before it lapses - passports, insurance, licences.
Record meeting	Only for a client you have marked as fine to record. Stop, put the phone away, and the items appear once it finishes transcribing.

Hold the capture button instead of tapping it to jump straight to Photo, Voice or **Record meeting.**

Four ways to report an issue

- A captured line that starts with a work word - the box on the previous page.
- **Guided issue report,** from the ... menu on the **Brain dump** page or on the **Capture hub.**
- The New issue sheet.
- **Photo capture** first - from the choices on holding the capture button, or the ... menu.

> **If you only remember one thing**
>
> You never have to choose the right way in. Anything captured can be re-filed during review, and re-assigned to another client afterwards. Capture first, decide later.

A DAY IN LISZ

Today, from morning to evening

Nothing below is a feature you have to set up. It is simply the shape a normal day takes once capture is a habit.

1. **Morning - open Today**

   Under the date and the **Pulse** pill, the **Next** tile shows your open time, a timer and any **Soft hold. Needs you** lists what is yours to move - five at most - and a safety item gets an **Act now** band on top.

2. **Through the day - capture without thinking**

   Something is said, something arrives, you front some cash. Do not file it. Tap the round capture button, use whichever way in is fastest, and get back to what you were doing.

3. **A calm minute - review**

   When captures are waiting, **Review N captures** appears on **Today.** Glance, fix what is wrong, **Confirm all.** Two minutes for a morning's worth of noise.

4. **Handed off - one row**

   The handed-off row counts what is back to you and what has gone quiet; tap it to open **In flight.** The row for clients needing attention opens **Clients.**

5. **The rest of the day**

   Then the events for today, **Busy day tomorrow,** your trips, and the **Weekly review** card. **By day** shows the week; on iPad the days column sits beside the briefing.

6. **The foot row**

   At the bottom, N overdue opens **By day** and N online opens **Runs.** The icons at the top of **Today** open **By day, Canvas** and **Runs.**

THE LOOP

Handing off, and chasing

Most things that go wrong do not go wrong because you forgot to do them. They go wrong because you asked someone and never heard back. The Work tab is where that gap lives: **Handoffs, Waiting** and **Trips.** Its cards count what is in flight, what is back to you and what has gone quiet; **Open board** shows everything in flight.

1. **Hand it off**
   Open the task and hand it to a person. It joins **Handoffs** on the Work tab with its clock running.

2. **It goes quiet**
   Every category has its own patience. When something has been quiet longer than it should be, it surfaces as gone quiet rather than sitting silently in a list you never open.

3. **Nudge**
   Open the handoff and tap **Nudge.** It drafts the chase for you. You still send it yourself - LISZ never messages anyone on your behalf - and sending resets the clock.

4. **Log a reply**
   When they answer, tap **Log a reply.** The state moves along: **Sent, Replied, Confirmed.**

5. **Confirm, then Mark done**
   Confirm closes the loop - either **Confirm and close the issue,** or **Confirm the handoff only.** **Mark done** finishes the handoff.

> **What it tracks**
> A handoff shows **Sent, Replied** or **Confirmed.** LISZ cannot tell whether someone has seen your message, so it does not pretend to: Seen is not a state.

CLIENTS

One card per client

The **Clients** tab shows one card per client, with a ring for its health. **Clients** needing attention come first. Tap the card to open its **Dossier;** tap the ring - or **Open workspace** at the top of the **Dossier** - for the whole workspace: its properties, trips, records, calendars, scope and briefing.

The Dossier

One page for the client: contacts, sizes, key dates and the facts that matter, with **Open workspace** at the top.

A property brief

A property opens as a brief: **Upkeep, Open issues, The house runs on** - with **Reorder** to put the people in your own order - and **Standing rhythm.** Below the photo, a strip offers **Manage** (the previous property screen), **Report an issue** and **Turnover brief.** A **Turnover brief** can be shared: **Share brief** sends it out, and **Choose** picks who shows under **People** on the ground.

A trip in its travel days

A trip inside its travel days opens as routing: **Route, House, Keys** and **Files. Full trip** opens the previous trip screen.

ONE LANE AT A TIME

Runs and the Canvas

Runs and the **Canvas** open from the icons at the top of **Today** - **By day, Canvas** and **Runs. Runs** also opens from the N online link in the foot row.

Runs

You get the most done when you stay in ONE lane of action - all the calls together, all the errands together, all the online work together - regardless of which client each item belongs to. Switching lanes is what costs you, not switching clients.

Every task carries an action type - a call, an errand, something to do online, and so on - mostly guessed at capture, correctable anywhere. Each lane in **Runs** shows everything of that kind across every client: pick a lane, run it down, and you have made calls for four clients without once changing gears. Events with an action type join their lane as well.

The Canvas

Today answers "what needs me now". The **Canvas** answers the other question: what does everything look like? Every client becomes a colored lane on ONE shared timeline, and the rows line up across lanes to the hour: noon in one client sits exactly beside noon in another, which makes overlaps visible at a glance.

Events render as blocks in their calendar's colour, sized by how long they run. Tasks lead with a circle, trips with an airplane, all-day items say All day. Tap any of them to open it. The pills across the top of the **Canvas** narrow the view: tap one for a single client, tap two and they sit side by side - the overlap read. **All clients** brings the fleet back.

> **Give each client its colour**
>
> Edit a client and pick one of the swatches - the colour follows it to the **Canvas** and the clients list. Tap the selected swatch again for automatic.

SEARCH AND THE COMMAND SHEET

Everything one search away

Search sits at the top right of every tab; tap it to open the **command sheet.** Type and the results come first. Under them are the actions: **New handoff, Draft client update, Log an expense** and **Coverage pack. Go to** lists the workspace sections in the order of the workspace, then Settings, **All entries, Agenda** and **Weekly review.** The first five rows show; **Everything else** reveals the rest.

TIME AND MONEY

The full calendar

Today shows today. For the whole picture open **Go to** - **Agenda** in the **command sheet.** Prefer the previous **Today,** which has **Agenda** and calendar on it? Settings - **Today** - **Today tab** off brings it back; the choice stays until you turn it on again.

Free time is a question you can ask

Because LISZ reads every calendar you ticked at once, it can answer "when am I actually free?" across all of them. The open time in the **Next** tile is that answer - a real gap, not a guess.

Money you fronted

Paid for something yourself? Say it in a **Brain dump** - "paid the gardener 80 bucks" is enough - or snap the receipt and let the amount fill itself in. You can also choose **Log an expense** in the **command sheet. Expenses** lives in the sheet behind your profile avatar at the top right.

ONCE A WEEK

The review that keeps it honest

The keystone habit, and the only recurring appointment LISZ asks of you. Start the **Weekly review** from its card on **Today,** or from **Go to** in the **command sheet.** It empties your waiting captures first, then walks you through every client one at a time - the stalled ones first.

For each one it asks a single question: is there one clear next action here? If there is, you tap **Next.** If there is not, you type one on the spot and it is filed to that client without leaving the review. If everything is parked on someone else, it offers a **Nudge** instead. Nothing quietly rots.

THE REST, BRIEFLY

Today	What needs you, what is next, what is handed off.
Work	**Handoffs, Waiting** and **Trips** - everything you have asked someone else for.
Clients	One card per client; **Open workspace** for its whole world.
Capture button	The round button beside the tabs: the **Capture hub.** Hold it for Photo, Voice or **Record meeting.**
Profile avatar	Top right. The You sheet: your profile, Settings, then **People, All entries, Expenses, Documents** and **Notes.**
Client switcher	Top left. **Open workspace, All clients, My life,** then each client.

The top line reads the same on every tab: the switcher on the left, search and your avatar on the right. This manual lives at Settings - **Starter Manual,** and behind the ? on the previous-interface screens.

My life catches everything by default. Break a client out only when a strand deserves its own world - and remember the switcher: **All clients** is a lens over everything at once, while **My life** is one world among the others.

Picked "Just me" at setup? **Clients** read as **Projects, Properties** as **Locations,** and **Trips** as **Gigs / Travels.**

> **You are good**
>
> Two habits carry the whole thing: dump early and often, and once a week run the **Weekly review.** The rest can wait until you need it.