Instructions & Installation Guide

DIGITAL PLANNERS

Part 1: Overview

After purchasing a digital planner, you will receive a link to access and download the planner folder. The folder comes in a .ZIP file which contains the contents of your purchase. Simply double click the .ZIP file to open it, and you'll see 3 .PDF files:

1. Instructions & Installation Guide
2. Printable Digital Planner
3. Linked Digital Planner

1 This is the file you're reading now - instructions, installation guide for iPad users, and getting started.
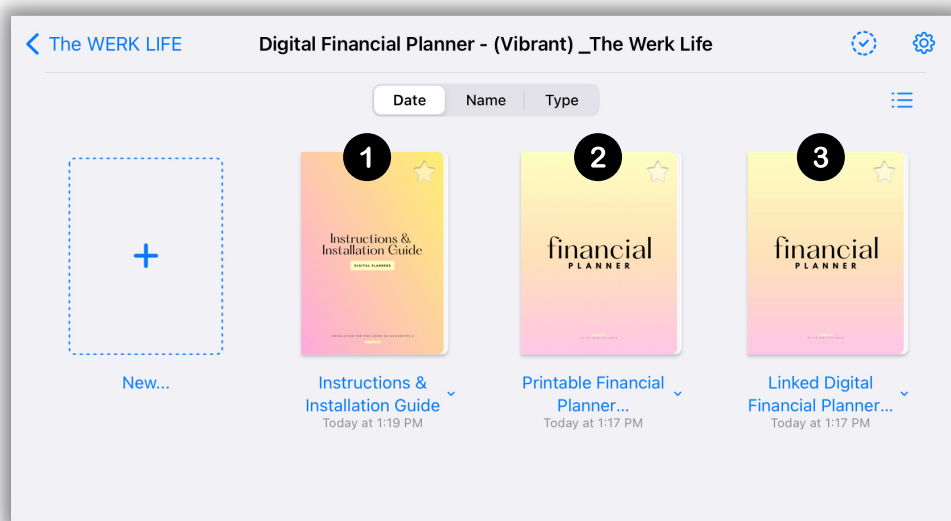
2 This is the first version of your planner. It's the complete PDF file which can be used if you're looking to print your planner.

3 This is the second version of your planner. This is the hyperlinked planner which can be used to easily navigate across pages.

Whichever version of the planner you use is completely based on your preference. You'll have lifetime access to both files once you download, so the world is your oyster!

Example of the .ZIP folder contents for our Digital Financial Planner:

Note: If you purchased a bundle, you'll see the 2 versions (Printable and Linked) of every single planner included in the bundle, and 1 Installation Guide.

Part 2: How You Can Use Our Planners

We've designed our digital planners with extra love and care to help you live a more organized and productive life. All of our digital planners are delivered in 8.5" x 11" PDFs, and can be used across multiple devices. In the next part of this guide we'll walk you through detailed installation instructions on an iPad – but if you're not an iPad user, here are other ways to get started:

TABLET

The most common way to use our digital planners is through a tablet. Apps like *GoodNotes*, *Notability* and *Xodo* make it easy to swiftly work through the planner pages, giving you options to bookmark and organize all of your digital notebooks. Having a stylus (or Apple Pencil if you have an iPad) can help mimic the feeling of using a paper planner as you write, annotate, and draw directly on the screen.

DESKTOP

Digital planners can be used on Desktop through paid apps like GoodNotes or through the free Adobe viewer tool. If using Adobe, click "Tools" at the top taskbar, and "Annotate". This will give you a list of options to insert text, draw shapes, as well as add bookmarks.

MOBILE PHONE

The same apps used on a tablet can be used on your mobile phone. With a smaller screen size, digital planning isn't optimal on a phone but it's definitely doable! It's recommended to use a stylus or inserting a text box when it comes to precision. Writing with your finger can be difficult when digital planning on a mobile device.

PRINT

If you prefer pen to paper and having a physical planner, you can always print the document or specific pages you'd like.

Summary of Compatible Tools & Apps

Though this isn't an exhaustive list (as there are new note-taking tools always on the rise!), these apps are tried and tested; commonly used for digital planning and note-taking. There is generally a one-time cost for downloading these tools which gives you a full suite of editing, writing, and drawing features to customize and use all of your planners. You have a few options to choose from. The tool we use for our planning videos and tutorials is GoodNotes 5.
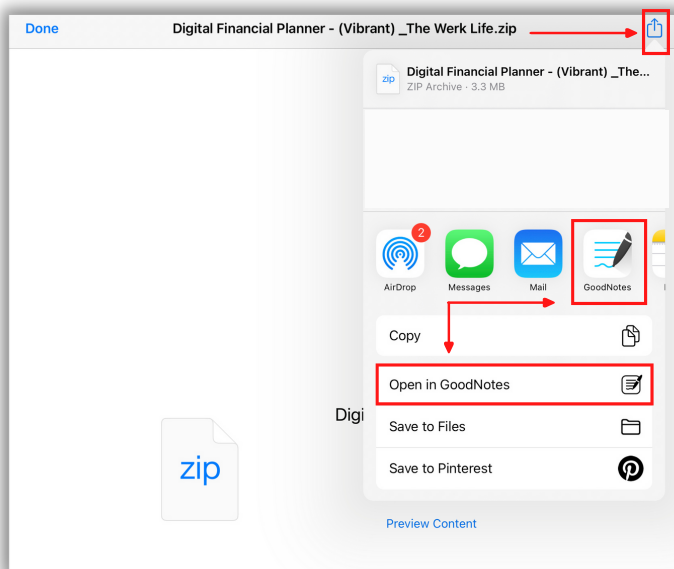
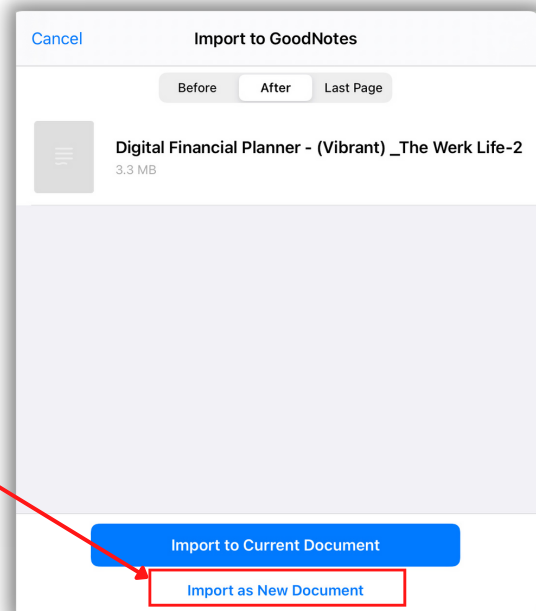| DEVICE	APPLE	ANDROID, PC, OTHER
Tablet	- GoodNotes 5 - Notability	- Xodo - Samsung Notes - OneNote
Desktop	- GoodNotes 5 - Notability - Adobe (free)	- Xodo - OneNote
Mobile Phone	- GoodNotes 5 - Notability	- Xodo - Samsung Notes - OneNote

Part 3: iPad Installation & Set Up

Let's take you step-by-step to get your planner set up on your iPad. For this example, we'll be referencing GoodNotes 5. However, many of these instructions are universal across note-taking apps and devices, meaning that even if you're not using GoodNotes 5, you may benefit from browsing through the instructions below.
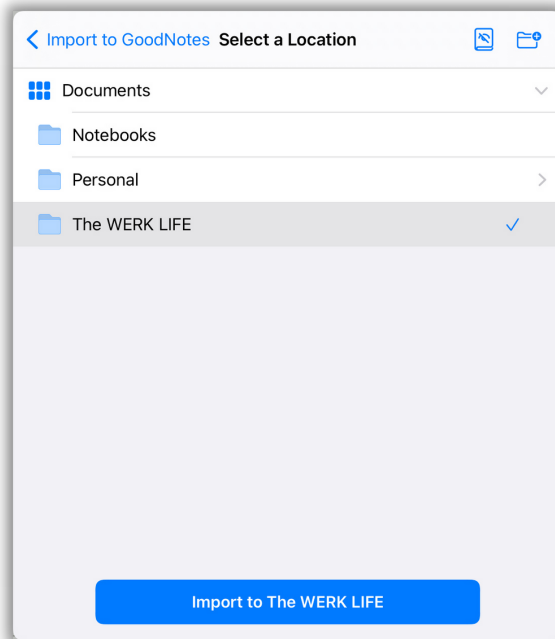
STEP 1: EXPORT THE PLANNER

After receiving your download link to access your planner, your first step is to export the planner to your desired note-taking app. You can do this directly from the email, or from your Files folder on your iPad, depending on where you've downloaded the .ZIP folder.
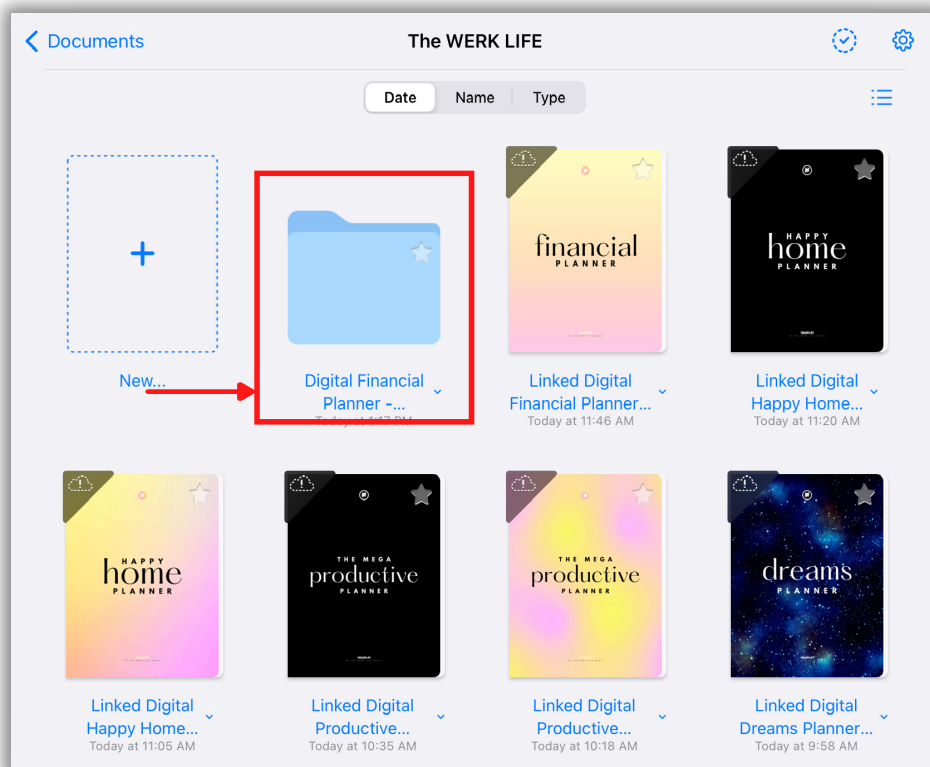

If you already have GoodNotes 5 set up, you may be asked if you want to "Import as New Document" or "Import to Current Document". If prompted, select **"Import as New Document"**. Skip this step if you don't see the prompt.

You may also receive a prompt to import the file into a specific folder or location. This is a great way to organize all of your documents and planners. You can always move your files to different locations at any point. Skip this step if you don't see the prompt.
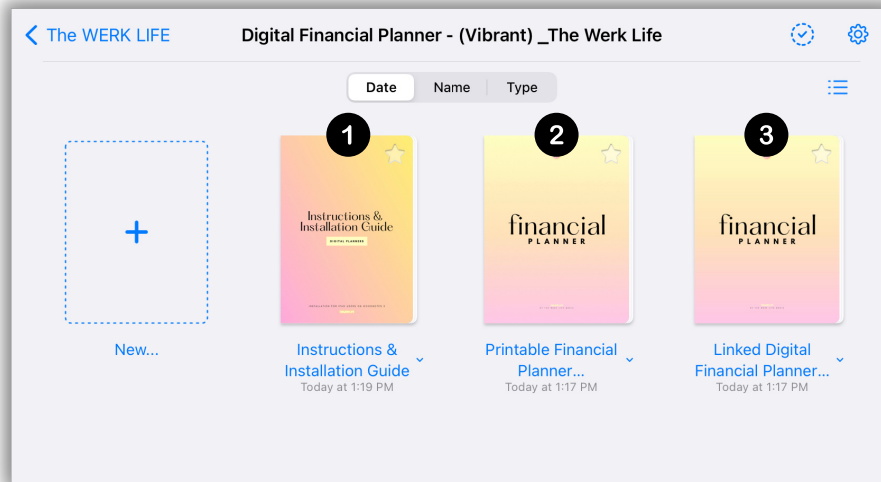

Once you've successfully exported your file out of your email or downloads, you should see it imported into GoodNotes 5.
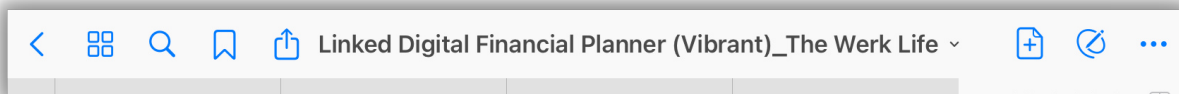
STEP 2: CUSTOMIZE & USE

Once you open the folder, you'll see the 3 files we mentioned in Part 1 of this guide.
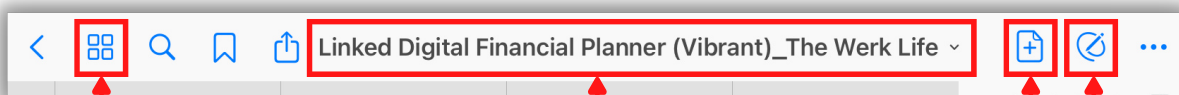

Note: If you purchased a bundle, you'll see the 2 versions (Printable and Linked) of every single planner included in the bundle, and 1 Installation Guide.

Click the planner you want to get started with, and the file will open.

Once the file has been opened, the planner is ready to use. You'll notice this bar at the top if you're using GoodNotes 5.

Here are a few key functions you'll want to know as you get started:

Click this to browse all the pages of the planner at a thumbnail view. This is a good way to see what the entire planner encompasses, and you can bookmark your favorite pages, as well as create your own outline.

Tap this area to rename the planner to your preference.

Add a new blank page, or duplicate an existing page to customize your planner.

Toggle between Edit and Read-only mode. **Note: links will only work if the planner is in read-only mode.**

STEP 3: MAKING THE MOST OF YOUR LINKED PLANNER

The linked functionality of our planners make it simple to navigate across multiple pages in just seconds. The tabs on the right side of the page are the main sections of the planner. Simply tap the tab to navigate to that section of the planner. If your planner has a dashboard, all links on the dashboard are hyperlinked to each individual page. Not all of our planners have dashboards – this depends on the length, contents, and type of planner.

HYPERLINKED.
TAP TO NAVIGATE TO THE PAGE OR SECTION OF THE PLANNER.

dashboard

Linked Digital Financial Planner (Vibrant)_The Werk Life

PART 1: THE VISION

Money Vision Board
Money Reflection
Wishlist
Financial Goals
Goal Planner
Progress Tracker

PART 2: BUDGETING, SAVINGS, INCOME, DEBT

Yearly Budget Tracker
Monthly Budget
Fun Spending
Bill Tracker
Savings Growth
Debt Free Tracker

PART 3: CASH FLOW

Income Growth
Net Worth Worksheet
Net Worth Tracker
365 Day Review

PART 4: MONEY CHALLENGES

$1K Save Challenge
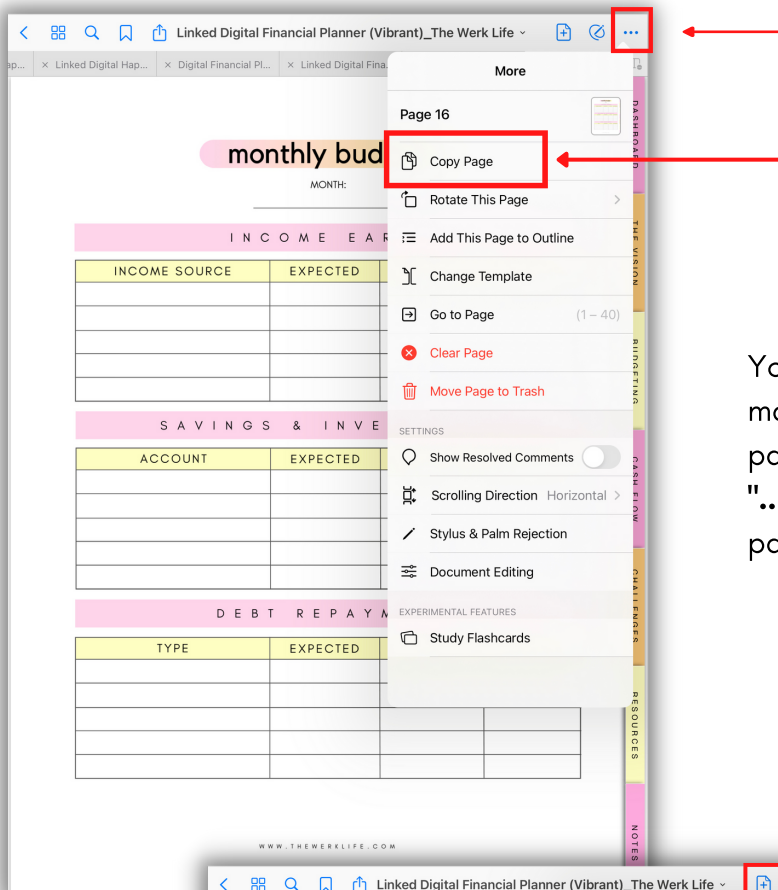*Reading Challenge*
Money Mindset Challenge

PART 5: RESOURCES

Accounts Summary
Financial Books to Read
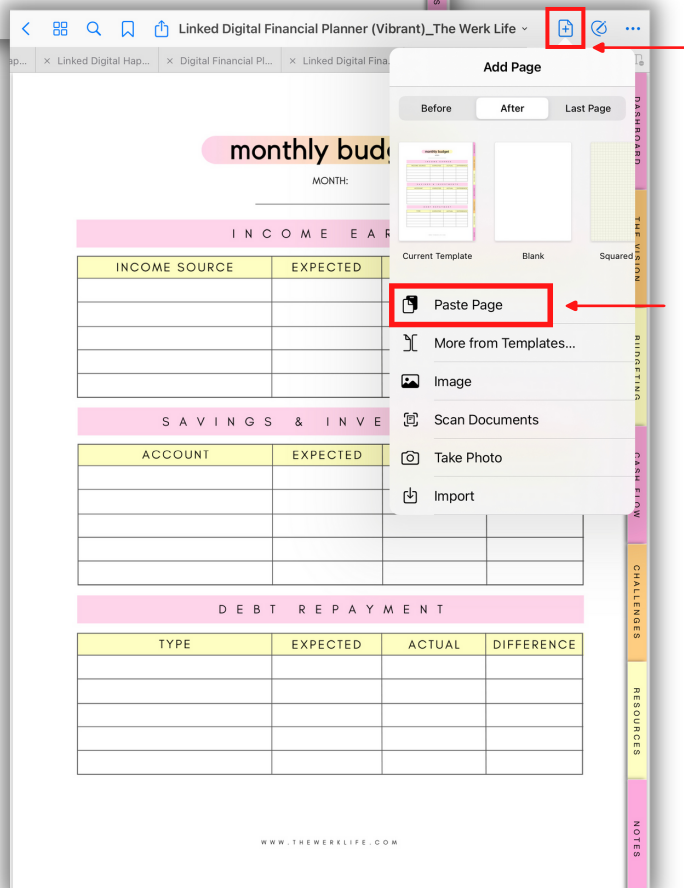*Financial Podcasts to Listen To*
Notes

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DASHBOARD
THE VISION
BUDGETING
CASH FLOW
CHALLENGES
RESOURCES
NOTES

Read-only mode must be on in order for the links to work. If your links do not work, try restarting the application and ensure you have the latest version downloaded. If the links still aren't working, contact us at info@thewerklife.com and we can help troubleshoot.
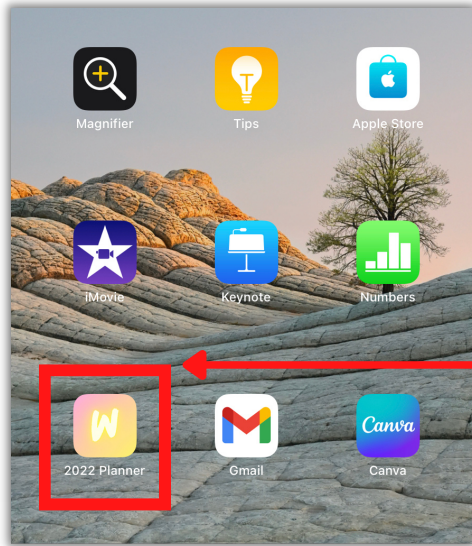
You can duplicate an existing page as many times as you want. Navigate to the page you want to duplicate, and click the "**...**" (more) icon at the top right of the page. Press "**Copy Page**".

Next, click the Add Page icon at the top, and press "Paste Page". This will add another copy of the sheet, either before or after the current page, depending on your preferences. This gives you unlimited access to every page and template in the planner!

BONUS TIP:

To get even easier access to your planner right from your home page, you can create you own iPad app icon, like this:
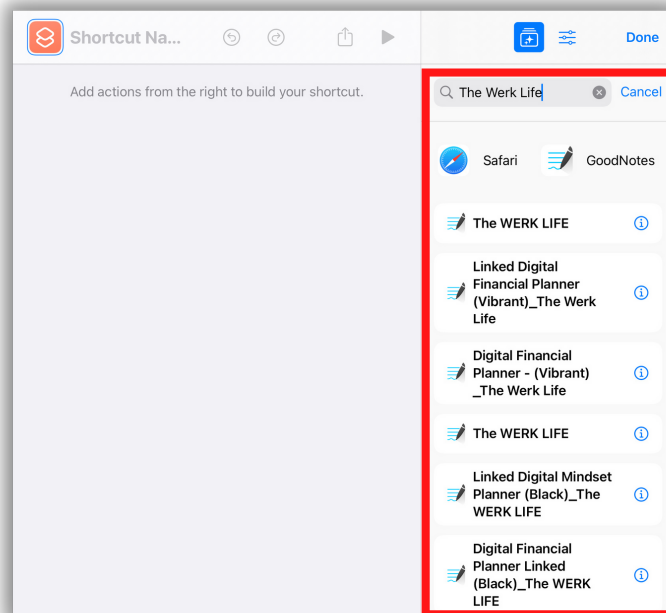

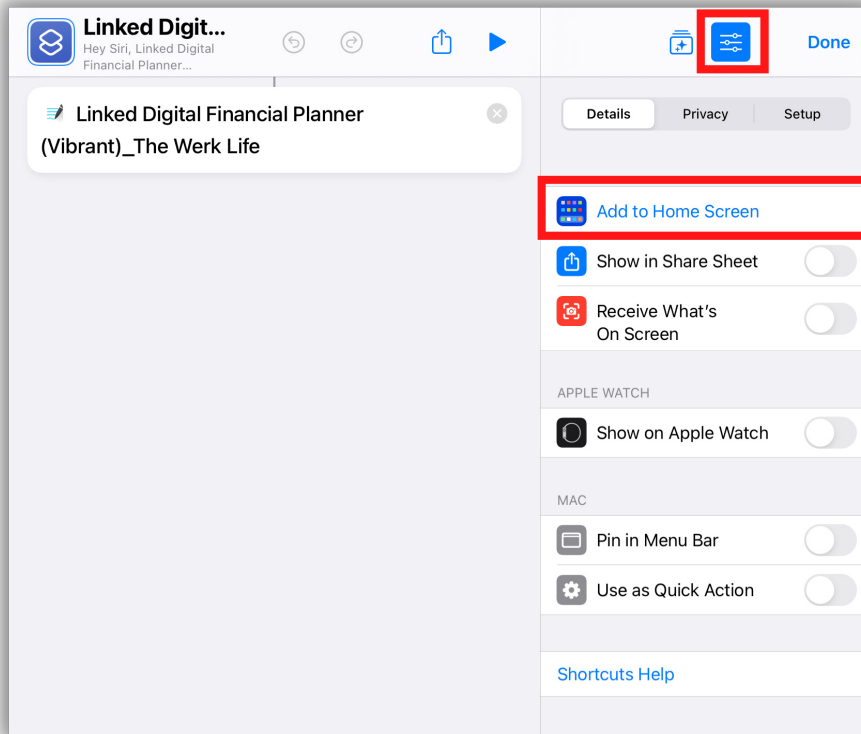This will open the planner directly on GoodNotes 5, saving you a few clicks!

Here's how to get set up.

HOW TO CREATE AN IPAD SHORTCUT:

1. Head to the **"Shortcuts"** app on your device, and click the **"+"** sign to add a new shortcut. In the right hand panel, search for the name of your planner. If you haven't renamed it, simply search **"The Werk Life"** and all of your planners from us should pop up. Click the one you want to create a shortcut for.
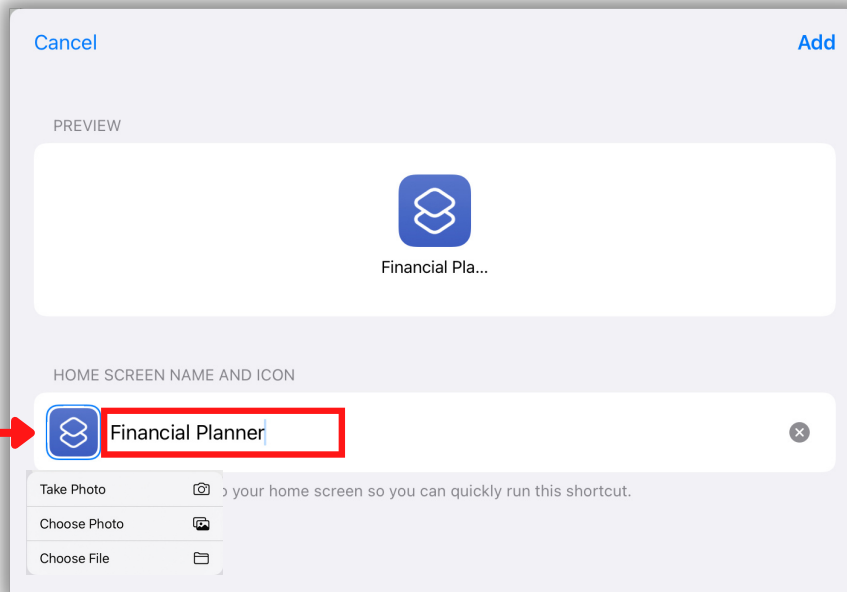
2. Once you've selected the planner you want to create a shortcut for, click the filter icon and then click **"Add to Home Screen"**.
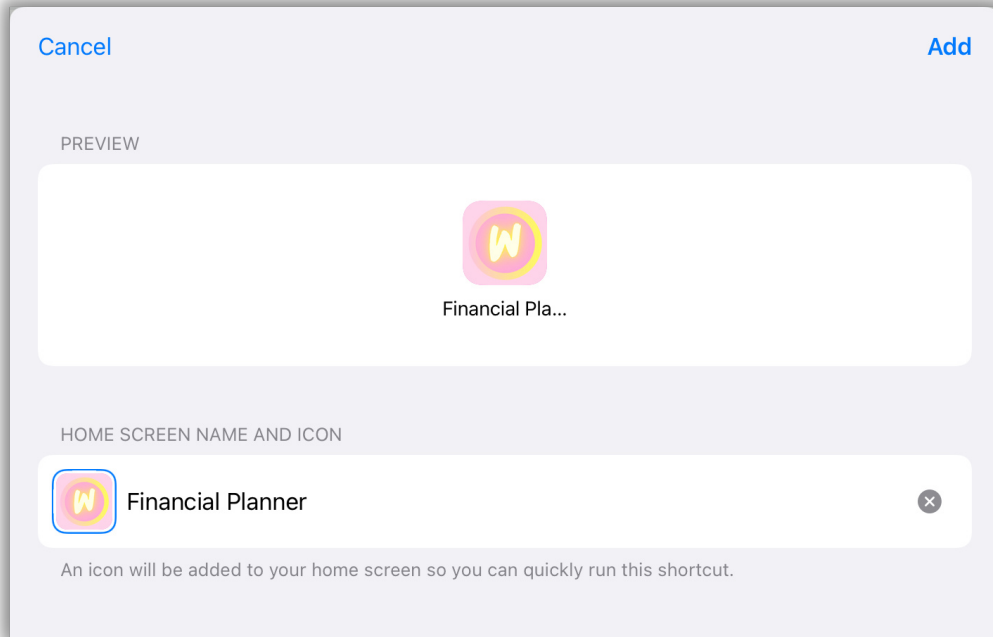

3. A window that looks like this will pop up. Here, you'll have the option to change the name of your shortcut as well as add a custom photo if you'd like.
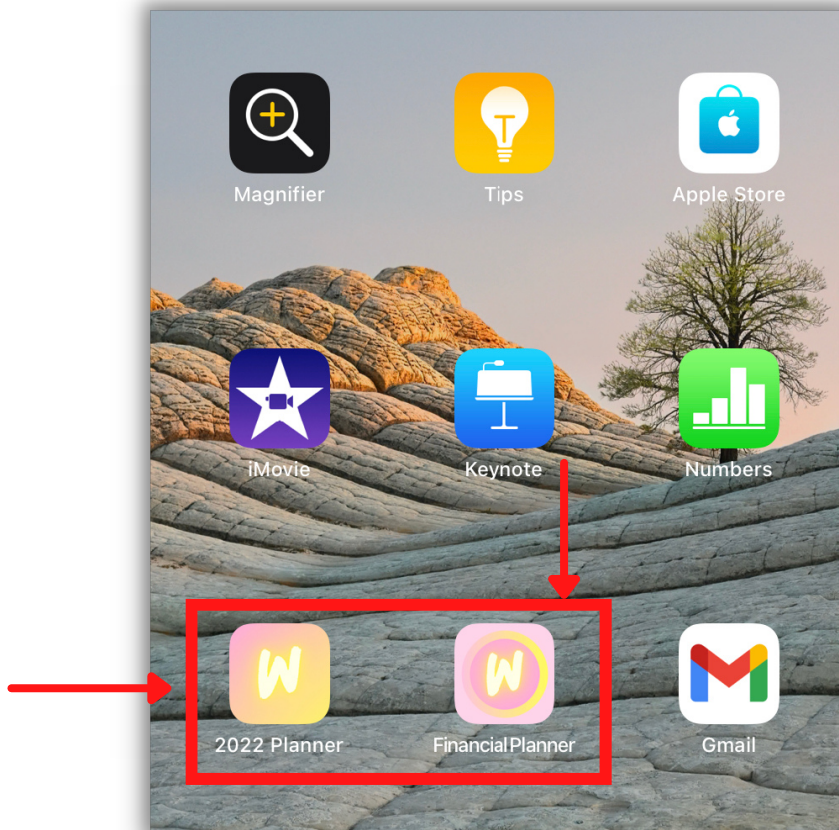

DOUBLE TAP THE ICON TO CHOOSE A CUSTOM PHOTO

We have lots of free of photo covers to make your home screen shortcut look amazing! You can check out and download free icon covers for your planners right here.

4. Once you've chosen your photo and named your home screen shortcut, click **"Add"** and then **"Done"** on the top right.

And voila! You should now have a shortcut icon that links directly to your planner in GoodNotes 5 from your homepage.

Happy Planning!

If you run into any issues or have questions, please let us know at info@thewerklife.com.

For more planning tips, check us out on YouTube under our "Planning" Playlist.

You
Tube

STAY CONNECTED