SETUP & USER GUIDE / EDITION 1.2

Plan & Act

A practical planning system for Apple Reminders, Apple Notes and Shortcuts

Created by @MoeAliChehade
Mohamad Ali Chehade | 23 November 2026

Two questions guide the system

What am I planning? Your planning lists hold the work.
What needs attention today? Daily Focus shows the right reminders.
What information supports the work? Notes holds the project details.

Read this before installing

This guide explains how to recreate and use the setup. Eight supplied Reminders links are on page 12. The Notes ZIP is attached, with readable copies on pages 14-15. This PDF does not automatically install the system. A tested shortcut installer is not included.

Verification: direct tests in Reminders passed for the cases listed on page 10. Smart Plan & Act was created separately in Shortcuts, but a complete shortcut run was not verified because its menu was not visible through Computer Use. Treat it as a build awaiting acceptance testing.

Find what you need	Page
System inventory and final names	2
Install the lists, Smart Lists and project board	3-4
Set up Notes and use the daily workflow	5-6
Understand and install the separate shortcut	7-8
Share the system, test it and solve problems	9-11
Template links and Notes installation / copies	12-15
References, checklist and illustrated workflows	16-18

PLAN & ACT / 02

What we built

Three apps, with a clear job for each. This is a planning workflow; it does not require the shortcut to work.

Component	Purpose
Apple Reminders	Stores tasks, due dates, flags, repeat schedules and completion status.
Apple Notes	Stores goals, decisions, reference material, drafts and project context.
Smart Plan & Act	A separate shortcut build intended to capture, find and manage items in both apps. It does not need the existing manager shortcuts.

The final names

Earlier name	Final name
Inbox used by the planner	Quick Capture
Week Priority / Weekly Priorities	Weekly Focus
Week Tasks / This Week	Weekly Actions
Month Tasks / Month Plan	Coming Up
Recurring Tasks	Repeat Schedule
My Day group	Daily Focus
New Projects board and template	Project Tracker
To Do / Doing / Done columns	Ready / In Progress / Finished
Project note template	Project Brief

Daily Focus: Priorities, Routines and Tasks keep these exact names and this order. They are Smart Lists, not separate places to store duplicate tasks.

Planner Notes: the existing companion folder contains Planner Home, Weekly Review, Monthly Overview, Project Brief and Smart Reminders Planner Launch. The launch note is specific to this project; others do not need it to use the core system.

Existing items preserved: a separate Planner Inbox was left unchanged. Quick Capture is the planner's pinned, default capture list. The live Project Tracker had three existing New Reminder placeholders; the saved empty template was checked separately. Test items were left for review.

PLAN & ACT / 03

Install the planning system

Start with the live lists. Build Daily Focus after the source lists exist. Mac menu names may vary slightly by software version. [1, 2]

1 / Prepare your account

1. Use the same Apple Account on the devices where you want this system. Enable iCloud for Reminders and Notes. Use updated iCloud Reminders; features differ with other account providers.

2. Open Reminders. If you are installing this on the Mac where we built it, check the sidebar first. Do not create duplicate lists with identical names.

2 / Create or identify six standard lists

Use **Add List** and choose the standard list type. Create **Quick Capture, Weekly Focus, Weekly Actions, Coming Up, Repeat Schedule** and **Project Tracker**. These lists own the reminders. Group Weekly Focus and Weekly Actions under Planner if you want the same layout.

If using the provided downloads, start on page 12. Import only the lists you need. The shared Planner Inbox should be renamed Quick Capture for this setup; create Weekly Focus and Weekly Actions separately if they are not already present. Do not assume Planner installs a group.

Pin Quick Capture using its list context menu. In **Reminders > Settings**, set the Default List to Quick Capture if you want new captures to land there. Check the account as well as the name when duplicate names exist.

3 / Build Daily Focus

Create a group named **Daily Focus**. Add three new lists using the **Smart List** type. Open each list's filter settings and use **all** conditions, not any. Select your own Repeat Schedule source list.

Order / Smart List	Filters to set
1. Priorities	Date: Today. Flag: Flagged. Source lists: unrestricted. Include Past Due: off.
2. Routines	Date: Today. Flag: Not Flagged. Lists: include Repeat Schedule. Include Past Due: off.
3. Tasks	Date: Today. Flag: Not Flagged. Lists: exclude Repeat Schedule. Include Past Due: off.

Move the three Smart Lists into Daily Focus in the order above. Keep completed reminders hidden; if completion is offered as a filter, choose incomplete. Do not use Show Completed when checking the unfinished daily view.

What these rules mean

A flagged reminder due today can come from any source list. An unflagged item in Repeat Schedule belongs in Routines. Other unflagged items due today belong in Tasks. Overdue, future-dated and undated items do not belong in these Today-only views. Review overdue work in a separate view.

PLAN & ACT / 04

Install Project Tracker

Use a live board for project actions and keep the saved template as the reusable starting point. [3, 4]

Build the board manually

1. Open the standard list Project Tracker. Add three sections named **Ready**, **In Progress** and **Finished**, in that order. On Mac, use **File > New Section** where available.

2. Choose **View > as Columns**, or the equivalent Columns view. Check all three headings and remove sample items only from a new, disposable starter copy.

3. For an empty starter board, leave all three sections without reminders. The existing live board is separate: do not delete real project work just to make a template empty.

Save and reuse the template

Select the clean list and choose **File > Save as Template**. Name it Project Tracker. Leave completed items out. To create a project, use **File > View Templates**, select the template and choose **Create List**. Name the new list for the project. [3]

After creating a copy, check that its empty sections and Columns view are present. If your device opens it as a list, switch to Columns view. A new copy has not been acceptance-tested on another device in this conversation.

How to work on the board

Stage	Action
Ready	Write the next concrete steps. Add dates only when they need attention on a particular day.
In Progress	Move the step here when work starts. Keep the number of active steps manageable.
Finished	Move the finished step here, then tick its completion checkbox. The column name alone does not mark it complete.

To move a step, drag its card or open its context menu and choose **Move to Column**. The direct test used the context menu successfully for both stage changes.

One board or one board per project?

The existing Project Tracker is one live list. For separate projects, create copies from its saved template and give each copy a unique project name. The shortcut's current workspace design does not automatically create or discover a matching board and note for every new project.

PLAN & ACT / 05

Set up Apple Notes

Keep the details in Notes and the actions in Reminders. Notes does not automatically synchronize its text or checklists with reminder completion.

Create the companion folder and notes

1. In Notes, identify or create the iCloud folder **Planner Notes**. Import the five Markdown files from the supplied Notes ZIP using page 13, or use the copy-ready text on pages 14-15. Keep one master copy of each planning note.

2. Use **Planner Home** as the index. Include the final list names, your daily process and links to the planning notes. Select the correct note when titles are similar.

3. Use **Weekly Review** to record progress and decide next week's work. Use **Monthly Overview** to hold upcoming commitments and review dates.

Copy-ready Project Brief

PROJECT NAME - Project Brief

Goal
What am I trying to finish? What does a finished result look like?

Key details
What information, boundaries or resources do I need?

Decisions and questions
What have I decided? What still needs an answer?

Links and files
Where are the supporting materials and the reminder board?

Next action
What is the next concrete step? Add it to Reminders; give it a due date only if needed.

Make a project copy and connect it

Keep Project Brief as the master. Copy its contents into a new note for each project and give that note a unique project title. Add the project's actionable steps to its reminder board.

For a simple connection, use the same unique project name in both apps and write the note title in the reminder's Notes field. For clickable links, use an app-provided link only when available and test it from the other app. A shared iCloud link may require an invitation; it is not automatically a public template link. [5]

A Planner Home link to Project Brief was tested in the existing setup. Automatic two-way linking for every new project was not built or verified. Do not assume an imported note will retain links to the recipient's own copies.

PLAN & ACT / 06

Use the system each day

Capture first, plan realistically, then use Daily Focus to decide what to do next.

Morning / five simple steps

1. Capture new tasks in **Quick Capture**. Use a clear action such as Draft the meeting outline. Save background information in Notes instead of putting an entire document into a reminder.

2. Review Quick Capture. Move important weekly commitments to **Weekly Focus**, other weekly work to **Weekly Actions**, and later work to **Coming Up**.

3. Give a reminder a due date of today when you want it in today's view. Flag the few items that deserve priority. Being in Weekly Focus alone does not put a reminder in Priorities.

4. Open **Daily Focus**: work through Priorities, then Routines, then Tasks. The Smart Lists show the same stored reminders; you do not need to copy them.

5. Open the relevant project note for context. Complete or reschedule the reminder in Reminders when your work changes.

Examples

Reminder setup	Where it appears today
Draft the August overview Weekly Focus; today; flagged	Priorities only
Send a follow-up Weekly Actions; today; unflagged	Tasks only
Reset workspace Repeat Schedule; today; unflagged	Routines only
A flagged routine due today	Priorities only, because Routines excludes flagged items
A future commitment in Coming Up	Outside Daily Focus until its due date matches Today

Weekly and monthly review

Each week, review overdue work and Coming Up, choose what still matters and set realistic dates. Use Calendar separately for appointments or reserved work time; the shortcut does not manage Calendar events.

Each month, review future commitments and repeat schedules. Keep one-time tasks outside Repeat Schedule unless you want them under Routines.

End of day: review completed work and tomorrow. Reschedule deliberately. Overdue reminders do not automatically roll into Daily Focus.

PLAN & ACT / 07

The separate smart shortcut

Smart Plan & Act was saved as a new shortcut. Smart Note Manager and Smart Reminder Manager were not replaced or edited for this build.

Menu design

Main menu	Purpose and expected use
Quick Capture	Add a reminder or capture a note. Enter the content and select the destination when prompted. Check dates and flags afterward.
Daily Focus	Choose Priorities, Routines or Tasks. Search using the corresponding Today-only rules, then choose a reminder to display.
Manage Reminders	Choose an incomplete reminder, then view details, edit its title, reschedule, move it to a list, change its flag or complete it.
Manage Notes	Find and open a note, create a note, append text to a selected note, or turn a note-related action into a reminder.
Project Workspace	Open the live project board and the Project Brief reference note. Stage changes are made in Reminders.
Planning	Open a planning list or find and open Planner Home.

What was confirmed

A separate shortcut entry named Smart Plan & Act was saved in the app. The initial exported build had no Run Shortcut dependency on the other managers. Its Daily Focus filters used all conditions, with Today, flag and Repeat Schedule rules matching the direct setup. A later revision was saved with 118 actions.

What is still unverified

The attempted menu run stayed active without a visible selection prompt through Computer Use. A complete run through capture, edits, note creation, list moves and completion was not observed. The final revision has not passed a full live acceptance test. Do not describe it as a tested public release.

Use the live apps while testing

The planning lists and Daily Focus can be used directly now. For the shortcut, verify each destination and test one operation at a time with clearly labelled test data. No Calendar event management or automatic two-way note/task synchronization is included.

PLAN & ACT / 08

Install and configure the shortcut

For the Mac where we built it, Smart Plan & Act is already present. These steps explain installation on another device after a tested export or iCloud link is available. [6, 7]

Before adding it

1. Install the planning lists and Notes folder first, using pages 3-5. Keep names consistent. The shortcut is not a complete one-click installer for the whole planning system.

2. Obtain the final shared iCloud shortcut link or an exported .shortcut file. This PDF does not contain that installer, and no public link has been verified for this build.

On Mac

3. Open the shared link in Shortcuts and review the actions before choosing **Add Shortcut**. For an exported file, open it with Shortcuts or use **File > Import**, then follow the displayed import steps.

4. Find Smart Plan & Act in the library. If you already have a copy, identify the version before replacing anything. Leave Smart Note Manager and Smart Reminder Manager in place.

5. Open the editor and inspect Add Reminder, Open List, Find Notes and Create Note actions. Select your own lists and folder wherever a stored destination is missing, red or incorrect. A matching name alone does not prove the account or destination is right.

On iPhone or iPad

6. Open the shared iCloud link, review the shortcut and tap **Add Shortcut**. If using a file, open the .shortcut file in Shortcuts and follow its import prompt. Check each destination on that device too.

7. Run one simple branch first. When Notes or Reminders access is requested for this intended workflow, review the permission prompt and allow the access you want. If you decline, that branch cannot perform its action.

First-run destination checklist

Check all six standard lists; the Repeat Schedule include/exclude filters; Planner Notes for new notes; Project Tracker for the board; and the unique Planner Home and Project Brief notes. A recipient must use their own copies, not links to your private originals.

If the menu does not appear, stop the run, return to the shortcut editor and inspect the first menu. Do not repeatedly start runs or assume that a task was created. Use the direct apps and the test plan on page 10 until the shortcut is verified.

PLAN & ACT / 09

Share your starter kit

Share reusable copies so each person can organize their own work. Collaborating on a live list is a different choice from distributing a template.

Prepare a clean release

1. Create separate starter copies. Remove FLOW TEST items, personal tasks and links to private notes from those copies. Keep your active lists intact.

2. Choose deliberately whether the planning templates contain helpful starter instructions or are empty. Check repeat schedules and dates before sharing. Do not publish old test dates as if they were the recipient's current schedule.

Share Reminders templates

On Mac, open **File > View Templates**. Use the template's More menu, choose **Share Template**, review the preview and the options for dates, tags and locations, then share its link. For an existing shared template, use **Manage Link > Send Link**. [3]

Recipients add their own list from the link. Anyone with the link may forward it; include only content suitable for that audience. [3]

Daily Focus needs its own setup

Custom Smart List templates save the current reminders, not the rules. Recipients must recreate the filters on page 3 using their own source list. Sharing an ordinary list template does not install the Daily Focus group. [3]

Share Notes and the shortcut

For independent note content, choose **Share > Send a Copy**, or supply copy-ready text. Collaboration invites people into a shared original; it is not the same as giving them a personal project template. Rebuild links between their own notes and lists. [5]

After the shortcut passes the acceptance tests, share its iCloud link or exported file. Include setup questions or clear instructions for device-specific destinations. Do not include an untested installer in a public release and call it complete. [6, 7]

Suggested package contents

One Start Here guide; clean links for the six planning lists or manual setup instructions; Project Tracker template; copy-ready planning notes; the tested Smart Plan & Act installer; and a short version/date note. The supplied Reminders links are on page 12. The Notes ZIP is attached, with installation on page 13. The shortcut installer still needs its own tested release.

Tests and acceptance checks

Direct app tests were performed on 23 November 2026. They checked routing and board behavior, not shortcut execution or cross-device sync.

Test performed	Observed result
Quick Capture, no due date	Created successfully. It did not appear in Tasks.
Weekly Focus, today, flagged	Appeared in Priorities.
Weekly Actions, today, unflagged	Appeared in Tasks; disappeared after completion.
Coming Up, tomorrow	Stayed outside the today-only Tasks view.
Repeat Schedule, today, unflagged	Appeared in Routines, even though this test item did not repeat.
Same source item after flagging	Appeared in Priorities; no longer appeared in Routines.
Project Tracker test step	Moved Ready to In Progress to Finished. It remained incomplete until its checkbox was ticked.

Six reminders beginning **FLOW TEST** were left for review. The Weekly Actions and Project Tracker tests were completed. A note titled **FLOW TEST - Plan & Act workflow** recorded the results. Its dash may display differently in the app.

Repeat these checks on a new installation

1. Create disposable TEST reminders covering the cases above. Compare their source list, due date and flag with the actual contents of all three Smart Lists. Do not judge a filter from an empty list alone.

2. Also test a flagged item due today in Weekly Actions, a flagged item due yesterday, an undated item and a future-dated item. The Today-only views should exclude the last three. These extra cases were not all directly exercised in the recorded session.

3. Run every shortcut branch separately: add one task, change its title/date/list/flag, complete it, create a note, append one line and open a note. Confirm the change in the destination app after each operation.

4. Confirm the intended changes on a second device. Test a fresh project template copy. Remove only your clearly identified disposable test content once finished.

Troubleshooting

Check the stored reminder and the actual filters before changing the system. A title, count or column name can be misleading.

Problem	What to check
A priority is missing	It must be flagged and due today. Confirm the Smart List matches all filters and is not restricted to only Weekly Focus.
An overdue task is missing	This is expected in Daily Focus. Include Past Due is off. Review Today or Scheduled separately and decide whether to reschedule it.
A routine appears as an ordinary task	Confirm it belongs to Repeat Schedule and that Tasks excludes that exact list in the correct account.
A one-time task appears in Routines	Routines identifies the source list, not whether Repeat is enabled. Move the one-time task out of Repeat Schedule or set its intended repeat schedule.
A flagged routine appears twice	Routines must use Not Flagged with all filters. Priorities owns flagged reminders due today.
A finished card still counts as unfinished	Moving into Finished changes the section, not the completion status. Tick the completion checkbox.
A template has no Smart List rules	That is expected. Recreate the custom Smart Lists and their source selections using page 3.
A note search opens the wrong note	Use unique project titles and inspect the selected result. A contains search can match several notes.
A note link will not open	Check access permissions and whether it points to someone else's original. A copied note may need new links.
A shortcut cannot find a list or folder	Create the destination first, then select the correct account/list/folder in the editor or at its prompt.
The shortcut does not show a menu	Stop the run. Inspect the menu in the editor and test locally. This remains an unresolved verification issue for this build.

Do not repair by making duplicate tasks. The Smart Lists are filtered views of the same reminders. Changing or completing an item there changes the original stored reminder. Keep test cleanup separate from existing work.

PLAN & ACT / 12

Get the Reminders templates

Click Open template in the last column. These are the eight exact links supplied by Mohamad Ali. Their shared contents and a fresh installation have not been independently verified.

Shared name	How to use it in this setup	Link
Project Tracker	Core project starter. Check Ready, In Progress and Finished; remove test content only from your own starter copy.	Open template
Daily Focus	Reference template. Recreate the Daily Focus group and three Smart Lists using page 3; this link does not prove those rules are installed.	Open template
Planner	Preview its contents. Do not assume it creates Weekly Focus and Weekly Actions as separate lists or a Planner group.	Open template
Planner Inbox	For a new installation, use this capture starter and rename the resulting list Quick Capture. Avoid a second capture inbox.	Open template
Coming Up	Core future-work list. Review any imported deadlines and reference links.	Open template
Repeat Schedule	Core routine source. Check each first due date, time, repeat rule and flag for your own schedule.	Open template
Things To Try	Optional extra list. It is not required for the core daily workflow.	Open template
Project Board	Optional separate board. Keep it distinct from Project Tracker unless you intentionally choose to adapt it.	Open template

Install order: capture list, Coming Up, Repeat Schedule and Project Tracker; then check Planner and create the weekly lists if needed. Build Daily Focus last. Optional extras can wait.

After opening a link: review the preview, choose Add List when offered, then check the name and contents in your own Reminders account. Do not add every link again on the Mac where these lists already exist.

The screenshot confirms these eight template names were present in the owner's template window. It does not establish their contents. Web retrieval could not inspect the iCloud previews; the PDF preserves the exact supplied link targets.

Install the Notes ZIP

Included attachment: **notes Smarts and Act.zip**. The archive was inspected and contains five .md files inside the folder notes Smarts and Act. It does not contain a shortcut installer.

Get the attachment or use the text copies

Save this PDF locally and open it in a PDF reader that exposes embedded attachments. Open its Attachments panel and save **notes Smarts and Act.zip**. If your viewer does not expose PDF attachments, use pages 14-15 to copy the text, or distribute the original ZIP alongside this guide. Do not import the PDF itself as if it were the editable Notes templates.

On Mac - Markdown import

1. Expand the ZIP in Finder. Open the notes Smarts and Act folder and locate the five .md files listed below.

2. On macOS Tahoe 26 or later, open Notes and choose **File > Import Markdown**. Select the five files and confirm Import. Find the resulting Imported Notes folder. [9]

3. Move the imported notes into your iCloud **Planner Notes** folder, or rename the imported folder if it contains only this set. Keep existing notes if they already hold your work.

On iPhone or iPad

On iOS/iPadOS 26 or later, expand the ZIP in Files. Touch and hold a .md file, choose **Share > Notes**, and save it as a new note. Repeat for the five files, then organize them in Planner Notes. [9] On older software, use the text copies on pages 14-15 instead of assuming Markdown formatting will import.

File in the ZIP	Use
Planner Home.md	Index and starting point.
Weekly Review.md	Review the week and update planning lists.
Monthly Overview.md	Monthly outcomes and upcoming commitments.
Project Brief.md	Reusable project context and next action.
Smart Reminders Planner Launch.md	Optional example project about sharing this planner.

Check these details after importing

Planner Home contains note titles as text, not working Markdown hyperlinks. Rebuild links to your own imported notes. Check doubled headings, bold formatting and tags. The archive uses repeated asterisks for emphasis; visual formatting and native tag recognition must be checked in Notes. Importing these files does not install Reminders lists or Daily Focus filters.

PLAN & ACT / 14

Notes templates - planning

Copy each block into a separate note with the title shown. These readable copies preserve the uploaded content without the repeated Markdown title styling. Bracketed text is for the person using the template to fill in.

Planner Home

Planner Home

Monthly Overview
Review goals and deadlines before choosing weekly actions.
Monthly Overview

Weekly Review
Sort what you captured and choose what matters this week.
Weekly Review

Project Brief
Use this template when starting a project.
Project Brief

Smart Reminders Planner Launch
Open the current project to review the template links and next step.
Smart Reminders Planner Launch

Weekly Review

#weekly-review
Week of: [Date]
Look back: What moved forward? What is still waiting, and who needs a follow-up?
Look ahead: Which deadlines are coming up? Which one to three outcomes matter most?
Update Reminders: Sort Quick Capture. Move doable actions to Weekly Actions and key commitments to Weekly Focus. Give each action a due date when you choose its day.

Monthly Overview

#month-plan
Outcomes
Outcome 1 - [What should be different by month end?]
Outcome 2 - [What else matters this month?]
Deadlines and commitments: [Date] - [Commitment]
Later: [Ideas or commitments for a later month]
Next actions: Add one concrete next step per outcome to Coming Up. Move the steps you can take this week to Weekly Actions.

Link the index entries after the notes exist. These printed titles are not automatically connected to the new notes.

Notes templates - projects

Keep Project Brief as a master. Make a separate copy for each project; do not overwrite the master with the details of a live project.

Project Brief

Project Brief

#project
Project and outcome
[Project name]
[How will I know the project is finished?]
Resources
[Links, related notes, or files]
Decisions and status
[What was decided?]
[What is moving or blocked?]
Next action
[A concrete action and its due date, if known]
Track the steps in your project list created from the Project Tracker template. From this note, use Share > Reminders to create an action with a link back to the note.

Apple supports creating a reminder from a selected note through the sharing workflow, adding an app reference or link. After creating one, open it in Reminders, choose the intended list and test that its note reference opens correctly. [10]

Smart Reminders Planner Launch - optional example

Smart Reminders Planner Launch

#active #this-week
Outcome
Give people a working Apple Reminders planner they can add to their device.
Resources
Add the shared template links and finished setup screenshots here.
Next action
Test the Daily Focus template link and record what it installs.

This fifth note is an example release project, not a requirement for every recipient. Its instruction to test Daily Focus remains useful: verify the installed content and then recreate the real Smart Lists. The separate Smart Plan & Act shortcut is still awaiting full live testing.

PLAN & ACT / 16

References and launch checklist

Official Apple documentation supports the installation guidance. The system names, design decisions and recorded tests come from this build session.

[1] Reminders: create or change lists
https://support.apple.com/guide/reminders/remn8f00ee72/mac

[2] Reminders: create custom Smart Lists
https://support.apple.com/guide/reminders/remnfec66479/mac

[3] Reminders: use list templates
https://support.apple.com/guide/reminders/remn29caf6e1/mac

[4] Reminders: manage sections
https://support.apple.com/guide/reminders/remn14bf0e77/mac

[5] Notes: share notes and collaborate
https://support.apple.com/guide/notes/apd4e6e2c9a6/mac

[6] Shortcuts: share shortcuts on iPhone or iPad
https://support.apple.com/guide/shortcuts/apdf01f8c054/ios

[7] Shortcuts: add import questions on Mac
https://support.apple.com/guide/shortcuts-mac/apdf330fd3a0/mac

[8] Notes: import, export and print
https://support.apple.com/guide/notes/not201900c07/mac

[9] Notes: import Markdown files
https://support.apple.com/en-us/102223

[10] Reminders: add a reminder from another app
https://support.apple.com/guide/reminders/remn1f735fdc/mac

Documentation checked 23 November 2026. Menu wording and available features depend on device, account type and software version. These Apple links are references, not Plan & Act download links.

Before your own daily use

- Six live lists exist, without accidental duplicates.

- Quick Capture is the intended default; Repeat Schedule contains the right items.

- Daily Focus has Priorities, Routines and Tasks in order, using all filters.

- Project Tracker has Ready, In Progress and Finished; a fresh template copy has been checked.

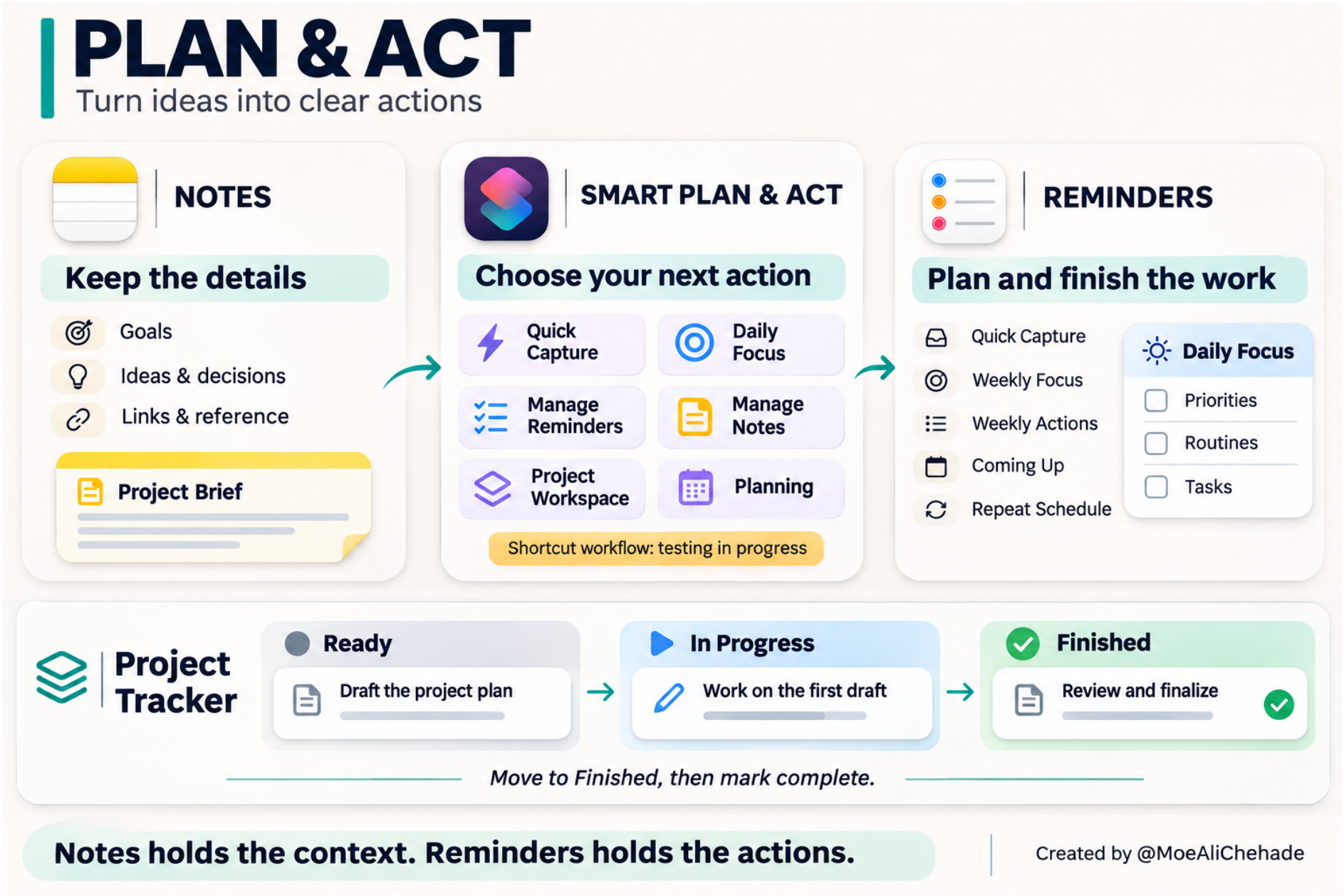
- Planner Notes and a unique Project Brief master are available.

- The shortcut's destinations and every action branch have passed a live test.

- Cross-device sync and any note/reminder links have been tested.

Before sharing publicly

Prepare clean starter content, obtain and test the real distribution links, verify a fresh installation and remove private references. Keep the shortcut marked as awaiting testing until its full workflow succeeds.



Illustrative app cards. Handoffs are chosen by the user; automatic two-way synchronization is not implied.

ONE TASK, FROM IDEA TO DONE

A practical Plan & Act workflow

1 WRITE THE CONTEXT

Goal, details, links and decisions.

Notes

Project Brief

- **Goal:** Create the project outline.
- **Details:** Main sections and key points.
- **Links:** Project resources.
- **Decisions:** Outline scope and next steps.

2 CAPTURE THE ACTION

Add a clear, actionable task to Reminders.

Reminders

Draft the project outline

Quick Capture

3 PLAN THE WORK

Choose a list, set a date, flag a priority.

Draft the project outline

Weekly Focus | Today

4 SEE TODAY CLEARLY

Flagged + due today = Priorities.

Daily Focus

Priorities	Routines	Tasks
Draft the project outline		

5 FINISH THE STEP

Move the card, then mark complete.

Reminders

Project Tracker

Ready	In Progress	Finished
		~~Draft the project outline~~

Smart Plan & Act brings capture and management into one menu.

Shortcut execution: testing in progress

Keep information in Notes. Take action in Reminders.

Created by @MoeAliChehade

A task can stay in its project board and still appear in Daily Focus. Avoid duplicate copies of the same action.