



Setting up your Coppermap — a quick guide

Welcome! Here's how to get your planner set up. It takes about 15 minutes, and once it's done your home screen shows your whole day at a glance. Work through it in order.

1. Open the planner

On your home page (this is where your schedule will live once it's set up), scroll to the bottom and tap "**Open the planner.**"

2. Unlock it

Enter the starter passcode: ``changeme``

Tick "**Stay unlocked on this device**" so you won't have to type it again on your own phone or laptop.

3. Set up your passcodes

(1) Set your own passcode — please do this first

The starter passcode is the same for everyone, so make it yours right away:

- Tap the **gear (Settings)** button at the top — it's just to the left of the lock.
- Under **Edit passcode**, enter a new passcode and save it.

You can change it anytime from that same gear button while the planner is unlocked. If you ever forget it and can't get back in, contact me and I'll reset it.

(2) Keep your calendar private (recommended)

By default, anyone who types your web address can see your schedule. To prevent that, set a **family viewing code** — a code people must enter just to open the app and see anything:

- In the same **Settings** panel, find **Family viewing code**.
- Type a code (at least 4 characters) and tap **Save viewing code**.

From then on, anyone opening your app has to enter that code first. Share it only with people allowed to see the calendar (family, helpers). Your own phone, laptop, and the home tablet ask for it just once and then remember it. You can change it or **Turn off** anytime from the same place.

There are two separate codes, and that's on purpose:

- **Family viewing code** — to *open and see* the calendar (share with everyone allowed to view).
- **Edit passcode** — to *change* the schedule (keep to the helpers who manage it).

This way the person using the home tablet can see their day and check things off, without being able to accidentally change or delete the schedule.

A quick shortcut: the "Quick add" bar

At the top of the planner there's a **Quick add** box. It's the fastest way to add anything — just type in plain language and press **Add**. For example:

- Dr. Lee Tuesday 2pm
- Lunch with Jane Friday 12pm
- Laundry every Sunday
- Mom's birthday apr 9

You can use it anytime. The steps below show the fuller way, using the three buttons at the top.

The three buttons

Along the top you'll see three buttons. Left to right they are **Day · Month · Plan**. We'll set things up working **right to left** — starting with **Plan**.

4. Plan — build your reusable lists

Tap **Plan** (the rightmost button). Here you fill in cards you'll reuse again and again. Every entry can be changed later with the **pencil**, or removed with the **x** (or **trash**).

- **Activities** — things you enjoy or do regularly: *Pickleball, Lunch with Jane, Movie time.*
- **Care providers** — anyone you book appointments with: *your doctor, dentist, hairdresser.*
- **Contacts** — family, friends, neighbors, and emergency people, with phone, address, email, and an optional birthday. Tick "**Add a note to Today**" to pin a contact to the home screen as a sticky note.
- **Daily** — everyday routines: *morning medication, meals.*
- **Errands** (out of the home) and **Chores** (in the home): *Grocery shopping, Laundry, Wash the car.*
- **Anniversaries** — birthdays and anniversaries; these appear every year automatically. Add a birthday to a **Contact** and it lands here on its own.

Filling these in now makes scheduling a few taps later.

5. Month — put things on the calendar

Tap **Month** to see the calendar. To schedule something, **tap the day** — a window opens showing that day, with an "**Add to this day**" button. Tap it and a form appears with your options.

Example: a doctor's appointment on the 25th — tap the 25th → **Add to this day** → choose **Appointments** → pick the doctor from the list (the ones you added under Care providers). Set the time, and you're done.

6. Add your recurring tasks and chores

For things that repeat, the easiest way is the **Quick add** bar at the top:

- Grocery shopping every Thursday
- Laundry every Sunday
- Take pills every day 8am

Repeats can be **every day, every weekday, or every week**. (For something that happens every *other* week or once a month, just add it on the specific dates in Month for now.)

You can also tap a day in **Month** → **Add to this day** and choose a "Repeats" option there.

7. Back to your home screen

Tap **Today** in the top-left (the Coppermap logo) to go back to the home screen.

Here you'll see **today's** schedule — what's happening now, what's next, and what's still to come today — and you can **check things off** one by one as you go. To look at other days, tap **Month**.

A couple of helpful extras

- **Greet them by name:** in the **Settings** panel, fill in the **Greeting name** (a person's name or a family name). The home screen then greets them — "Good morning, Bella" instead of just "Good morning." Leave it blank for a plain greeting.
- **Add a photo and a note:** when adding something, use the **+ Full form** to attach a photo and a note. The photo shows up large on the day screen — lovely for remembering who you're seeing.
- **Keep it open on a tablet:** the home screen gently chimes for timed reminders *while it's open*, so on a shared tablet at home, keep it open and charging. Use **Add to Home Screen** in your browser so it opens full-screen like an app.
- **Quick links to favorite sites:** in the **Plan** tab there's a **Quick links** card — add a label and a web address (like AOL Mail or Amazon) and it appears as a big button on the home screen. One tap opens the site in a new tab and you stay signed in, so it's an easy way to reach everyday sites without hunting for them. You can also add a **logo** (under the same card, choose a picture of the site's logo) so the button shows the familiar image — much easier to recognize than words. Save the logo as a picture first, then upload it.
- **Sticky notes:** on the home screen, tap **+ Add a note** to put up a quick reminder as a yellow or pink sticky note — "Anna brings dinner at 6," "Water the plants." On a wide screen the notes tuck along the sides; on a phone they sit at the bottom. Tap a note's **x** to remove it. (Notes don't need the edit passcode, so anyone can jot one down.)
- **A weather button:** in the **Plan** → **Quick links** card there's a **Add a weather** helper — type your town and state (or ZIP) and Coppermap adds a **Weather** button to the home screen that opens your local forecast.
- **See more about an entry:** on the home screen tap **Month**, tap a day to open it, then tap any entry to see its details — an appointment shows the provider's phone and address, plus any notes.
- **Make the calendar full-screen:** the **Month** view has a **Full screen** button that fills the whole screen — handy on a TV or a shared tablet.

- **Make Coppermap open by itself:** set Coppermap as your browser's home page so it opens automatically. The wording differs a little by browser:
 - **Safari:** Settings → General → set **Homepage** to your Coppermap address, and choose "**New windows open with: Homepage.**"
 - **Chrome:** menu → Settings → **On startup** → **Open a specific page or set of pages** → **Add a new page**, then paste your Coppermap address.
 - **Firefox:** menu → Settings → **Home** → **Homepage and new windows** → **Custom URLs**, then paste your Coppermap address.
 - **Edge:** menu → Settings → **Start, home, and new tabs** → **Open these pages** → **Add a new page**, then paste your Coppermap address.

On a Mac you can also have the browser launch when the computer turns on (**System Settings** → **General** → **Login Items**). For a cleaner, app-like window, Safari's **File** → **Add to Dock** turns Coppermap into its own app.

That's it — enjoy, and tell me anything that's confusing or that you'd love it to do.