

# Apps4.Pro Planner Outlook Desktop Add-in User Guide

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Apps4.Pro Planner Outlook app allows you to convert email to Planner task, sync tasks created in Planner as Outlook tasks / Calendar appointments, Attach/Upload email to Planner task, Create/edit/delete Planner tasks, Set Reminders for Planner Tasks and View all Planner tasks assigned to you (My Tasks view). This manual helps you with the steps to install the app and initial configuration to get started easily.

# Installation

# Step 1 – Download

Download Apps4.Pro Planner Outlook from <u>https://apps4.pro/microsoft-planner-outlook-addin.aspx</u>

# Step 2 - Installation

Once the download is complete, double click on the setup to begin the installation. Now follow the screenshots below to complete the installation.





Apps4.Pro Setup	$\times$
End-User License Agreement	
Please read the following license agreement carefully	21
JIJITECHNOLOGIES LICENSE TERMS	
These license terms are an agreement between JiJiTechnologies	
and you. Please read them. They apply to the software	
"Apps4.Pro" you are downloading from apps4.pro, which includes the media on which you received it, if any. The terms also apply to	
any JiJiTechnologies	
I accept the terms in the License Agreement	
O I do not accept the terms in the License Agreement	
Apps4.Pro	
< Back Next > Cancel	
Apps4.Pro Setup	×
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Ready to Install	
Ready to Install The Setup Wizard is ready to begin the Apps4.Pro installation	
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Now the installation is complete. From your Outlook desktop click on the Sign-in button from the Outlook desktop menu and sign in with your Office 365 Planner account.

# Getting Started

# 1 – Launch the add-in

Double click on the shortcut icon of Apps4.Pro Planner Outlook in your Outlook to start the app.



Fig.1.1. Apps4. Pro Planner Outlook

# 2 – Sign in

Click on the sign-in and enter the username and password.



#### Fig.1.2. Apps4. Pro Planner Outlook

ign in to	your account	Magaian 1210	>
	Microsoft		
	Sign in		
	Email, phone, or Skype		
	No account? Create one!		
	Can't access your account?		
	Sign-in options		
		Next	

Fig.1.3. Apps4. Pro Planner Outlook.

# 3 - Settings

Here you can perform the following settings from here:

#### 1.Settings to sync Planner tasks with Outlook tasks/calendar appointments.

Under the Sync section in settings, you can check/uncheck the following settings,

- Sync planner tasks assigned to me as outlook task
- Add reminders
- Do not override existing reminder time
- o Sync planner tasks assigned to me as appointments in calendar
- Do not override existing appointment time

# 2.Ignore completed Planner tasks from sync

You can eliminate completed tasks from syncing by clicking settings-others and check the "Do not sync completed Planner tasks"

#### 3. Clear all Planner tasks and appointments synced to Outlook

If you want to erase already synced Planner tasks in Outlook tasks or Outlook calendar, then the Clear data section helps you to clear Planner tasks and appointments.

# 4.Set currently logged in user as default assignee for tasks

If you want to assign logged in user as default assignee in task creation, then go to Assignment section in settings and check the "Set current user as default assignee"



Fig.1.4. Apps4. Pro Planner Outlook.

# 4 - Sync in Progress

Please click on the sync option to sync the Planner tasks to Apps4Pro. Once the sync process is completed, you can start using the app.



Fig.1.5. Apps4. Pro Planner Outlook.

# 5 - Attach an email to Task

You can convert email to the task and the email will be automatically added as an attachment to the task. To attach additional emails to task just drag and drop the email to the task window. The email will be uploaded and saved as another attachment.

	Hom	e Send / Receive	Folder View Help Apps4.Pro Outlook	<b>Desktop</b> Grammarly	Group	
<b>→</b> Dut	Ne Tas	w Email Attach Email	Task to Text to View Plan Settings Sync Ianner Task Planner task Task Settings	O P E E	Ck FAQs	
Sele	ct tas	sk to attach email as a	attachment		🕞 Attach e	mail to task   🗕 🗖
	My Ta ► Ne	asks 🔿 Plan Tasks 📿 ew Task		Search	✓ Sh	ow completed tasks
		Plan \$	Title ≎	Bucket ≎	Progress \$	Assigned To
		Conference	test	To do	NotStarted	Monisha Raghuramji
	💉 n	nonisha1	work1	To do	NotStarted	Monisha Raghuramji
	💉 n	nonisha1	Sorry for the inconvenience caused, Please download th	• To do	NotStarted	Monisha Raghuramji
		Conference	RE: Remote Access	To do	NotStarted	Monisha Raghuramji
	🔊 n	nonisha1	Would appreciate an update on the dependencies upgr	a workload	NotStarted	Vinodha Ramji;Monisha
	🔊 Т	EST 21	email attachment	To do	NotStarted	Monisha Raghuramji
	🖍 n	nonisha1	work	To do	NotStarted	Monisha Raghuramji
~	🖍 Т	EST 21	work	To do	NotStarted	Monisha Raghuramji
<b>•</b>	🖍 e	ducation	todd	To do	NotStarted	Monisha Raghuramji
	<b>/</b>	EST 21	test5	To do	InProgress	Monisha Raghuramji
		EST 21	test5	To do	InProgress	Monisha Raghuramji
	<b>/</b> T					

Fig.1.6. Apps4. Pro Planner Outlook.

# 6 - Sync Planner Tasks with Outlook Task

C Annsellin

Sync Planner tasks assigned to you with your Outlook Tasks / To-Do / Reminders. You can review the complete list of tasks assigned to you from your Outlook Calendar and To-Do lists. Edit start and due dates from Outlook calendar/tasks and get it synced with your Planner task automatically.



		BUCKET	START DATE	DUE DATE	*	12 CA
TASK SUBJECT	PLAN	BUCKET	21111 27112			
Click here to add a new Task						
A Due Date: None: 1 item(s)						
Test 4	Online Marketing	Launch Events	None	None		
A Due Date: 16 July 2016: 4 item(s)						
Team get-together			Sat 16-07-16	Sat 16-07-16		
Appointment task	Product Marketing	To Do 1	Wed 13-07-16	Sat 16-07-16		
Management To-Dos group	Marketing Campaigns	To do	Sat 16-07-2016	×: 16-07-16	2	10
Task 16072016	Management To-Dos	To do	Sat 16-07-16	Sat 16-07-16		
<ul> <li>Due Date: 19 July 2016: 2 item(s)</li> </ul>						
Review Meeting	Engineering	To do	Tue 19-07-16 Sat 16-07-16	Tue 19-07-16 Tue 19-07-16		

Fig.1.7. Apps4. Pro Planner Outlook.

# 7 - Create / Edit planner tasks from Outlook

Now Outlook becomes your one-stop destination to Create or edit Planner tasks, drop into the respective bucket and assign to user/group.

II Unread		By Date * 1	Newest	1 ^	Wed 06-07-16 10-53 Alex Darrow	Type a n
Two Weeks Ago	Đ	Сору			RE: Telephone Bill for May 2016 Arrears	Test 4
MOD Administrator Accepted: Telephone Bill. 0672016	-	Quick Print			To Alex Darrow; Management To-Dos	
		<u>B</u> eply Reply <u>A</u> ll		Tas	details	– ×
MOD Administrator added you to the M Welcome to the Management To-Dos gr						e Alex Darrow
Alex Darrow	6	Mark as Unread	3	5	Name	
RE: Telephone Bill for May 2016 Arrears Please attached the Invoice for the paym		Categorize	-		Telephone Bill for May 2016 Arrears	
ricese actablieu une inivitte iui une payn		Follow Up		-		
Three Weeks Ago	€	Ignore	- 1	G	Management To-Dos   To do  20-07-16	14
Alex Darrow	89	Junk	-	De	rigton	
RE: GingerEx For O365 Latest Test Setup Task RE: GingerEx For O365 Latest Test S	Х	Delete		Pie	se attached the Invoice for the payment.	
		Archive	- I.			
Alex Darrow 1	25	Convert To Tas			Convert Z	

Fig.1.8. Apps4. Pro Planner Outlook.

#### 8 - Convert Outlook Task to Planner task

Convert your existing outlook tasks into Planner task and group it to respective Plan / Bucket.



TASK SUBJECT	~	Mark Complete	t		BUCKET	START DAT	TE	DUE DATE	•	CATEGORIES						
Click here to a	Ŗ.	Assig <u>n</u> Task														
A Due Date: No		Rename <u>T</u> ask														
🕌 Test 4		Categorize	×	Marketing	Launch Events	None		None								
A Due Date: 16		Follow Up	۶I													
Team get-toge Appointment t	N.	One <u>N</u> ote				Sat 16-07-	16	Sat 16-07-16				~				
👪 Management	×	<u>D</u> elete		onvert to p	planner task						-	×				
상 Task 16072016	8	New Planner Task									e Alex Darrow	w				
<ul> <li>Due D</li> <li>Review Meetin</li> </ul>		Convert to Planner Task	Т	fask Name												
🐉 Outlook task		Eng	R	Review Meeti	ng											
			C	C Marketi	ng Team	•	To do	-	D TA	SK SUBJECT		PLA	N	BUCKET	START DATE	-
				Description					Cli	ck here to add a new	Task					
					da for this revie	w.			⊿ D	ue Date: 16 July 2016	5: 4 item(s)					1
			L				-		🗘 Tea	am get-together					Sat 16-07-16	<b>S</b> .
							2	Convert	😵 Tas	ik 16072016		Ma	nagement To-Dos	To do	Sat 16-07-16	1
									⊿ D	ue Date: 19 July 2016	i: 2 item(s)					5
										view Meeting		•••••	keting Team		Tue 19-07-16	
									800	itlook task		Eng	ineering	lo do	Sat 16-07-16	
																- N

Fig.1.9. Apps4. Pro Planner Outlook.

# 9 - Create & Assign tasks from Highlighted text

Reply Reply Tue 05- Zrinka Stocks Katle Jordan; Mol	.07-16 a Mak	18:48	anis De	thenne; Sara Davis
Action Items Did anybody see -Lisa	Norti E	<u>C</u> opy	X 0.1/01	the last three days? What do you think that means for our project?
Lisa	ø	Who Is Smart Lookup Synonyms	•	Aziz Hassoureh      Northwind's stock price over the last three days      Contexe Next
	eg.	Tran <u>s</u> late View <u>S</u> ource		Contoso News  To do To d

Fig.1.10. Apps4. Pro Planner Outlook.

# 10 - Set Reminders for Planner tasks

Set reminders for Planner Tasks when it gets synced with your Outlook as Task / Appointment.

Set default reminder time for all tasks/appointments based on Start / Due dateSet individual reminders for each task when creating a new planner task / convert email to the task.



Email to Task	_ = ×
Email Test mail 7 from demo domain	MOD Administrator
	Type a task name Test mail 7 from demo domain
	Plan Bucket
	Test CM Plan 🔻 To do 🔻
	Progress Start date Due date
	NotStarted   Start anytime   19-05-2018  Sync
	Set outlook task reminder with Due 🔻 date and remind me 2 🖨 days before at 04:30 PM 🗢 🗸
	Set appointment start time 08:00 AM 🔶 🗸 , end time: 08:30 AM 🚭 🗸
	·
<ul> <li>Attach email as attachment in ta</li> </ul>	sk Convert
Attach email as attachment in ta     File Home Send / Receive	
File Home Send / Receive	<ul> <li>Folder View Apps4.Pro Outlook Desktop Help ♀ Tell me what you want to do</li> <li>♦ ↓ ☑ ▣ ✿ ↔ ♀ @ ■   ♥ ♀</li> </ul>
	Folder     View     Apps4.Pro Outlook Desktop     Help          \[             Tell me what you want to do
File Home Send / Receive	Folder       View       Apps4.Pro Outlook Desktop       Help       Image: Tell me what you want to do         Image: Task to       Text to       View       Plan       Settings       Sync       Support Forum Feedback       FAQs
File         Home         Send / Receive           Image: SignOut         Image: SignOut         Image: SignOut         Image: SignOut           New         Email         Attach Email         Image: SignOut         Image: SignOut	Folder       View       Apps4.Pro Outlook Desktop       Help       Image: Tell me what you want to do         Image: Task to Text to View       Image: Text to
File     Home     Send / Receive       Image: SignOut     Image: Search Current Mailbox     Image: Search Current Mailbox       Image: Search Current Mailbox     All     Unread	Folder       View       Apps4.Pro Outlook Desktop       Help       Call me what you want to do         Image: Task to Text to Planner Task Planner task Apps4.Pro       Image: Task Settings Synce Apps4.Pro
File     Home     Send / Receive       SignOut     Image: Send / Receive       New     Email     Attach Email       New     Email     Attach Email       Account     Search Current Mailbox       All     Unread     Search Current Mailbox       All     Unread     Search Current Mailbox	Folder       View       Apps4.Pro Outlook Desktop       Help       Call me what you want to do         Image: Sync Planner Task Planner Task Planner Task Planner Task Planner Task Planner Task Settings       Image: Sync Planner Task Planner Task Planner Task Settings       Image: Sync Planner Task Planner Task Planner Task Planner Task Tasks Settings       Image: Sync Planner Task Planner Task Planner Task Planner Task Tasks Settings       Image: Sync Planner Task Tasks Settings       Image: Sync Planner Task Pl
File     Home     Send / Receive       SignOut     Image: SignOut     Image: SignOut       New     Email     Attach Email       Task     to Task     to Task       Account     Search Current Mailbox       All     Unread     and the sign of the sign	Folder       View       Apps4.Pro Outlook Desktop       Help       Call me what you want to do         Image: Context to Text to Text to View       View       Plan Settings       Sync       Sync       Sync       Sync       Contact         Sync       Outlook tasks       Sync Planner tasks assigned to myself to Outlook task       To Outlook tasks       Sync
File     Home     Send / Receive       SignOut     Image: Send / Receive       New     Email     Attach Email       New     Email     Attach Email       Account     Search Current Mailbox       All     Unread     Search Current Mailbox       All     Unread     Search Current Mailbox	Folder       View       Apps4.Pro Outlook Desktop       Help       C Tell me what you want to do         Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Settings       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Sync       Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact       Image: Contact         Add reminders on tasks with       Image: Contact       Image: Cont

Fig.1.11. Apps4. Pro Planner Outlook.



# 11 - Link Planner tasks to an email item

You can link multiple Planner tasks to email. It helps you to identify the tasks that are created/related to an email. You can able to update task details/post comments on Planner tasks from this view.

Message Apps 4 Pr	ro - Planner 🛛 🖓 Tell men	what you want to do											
ore X =	Reply Forward More	Team Email	G To Mana ✓ Done 梦 Create N	· .	Rules P OneNo Action	ote Assign	Mark Categorize	Follow Up ▼	Translate	P Find Related ▼ k Select ▼	Zoom		
Delete	Respond	Qui	ck Steps	Fa	Move		Tags	ra l	E	diting	Zoom		
CL3 Task 3	Task 1									3	-		
Plan 07092016	<ul> <li>To do</li> </ul>												
Plan 07092010	+ 10 d0		•	NotStarted •	Start da	ate	Due date		14	•••			
Fitle CL3		Marc <u>a</u> Move				ate	Uue date		14				
Title CL3 reated by :Alex Darrow	Zrinka Makovi Stocks			tt task to link to e		ate	UUe date		14		2/	+ C Link to	
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ride 13 Description Add description	Zrinka Makov Stocks Did anybody see t Anne Wallace Let's reschedule t My daughter will Anne Wallace Let's reschedule t	Move OneNote Moye to Clutter Ignore Junk Delete	Plan :	t task to link to e Plan 07092016	BUCKET To do	✓ C <sup>2</sup>	C Refresh	+ New CREATE	Task D BY	Search ASSIGNED BY		Group by	63
Title 13 Description Add description Attachments	Zrinka Makov Stocks Did anybody se t Anne Wallace Let's reschedule t My daughter will Let's reschedule t Let's reschedule t Hi Katte	Move OneNote Move to Clutter Ignore Junk Delete Archive	Plan :	t task to link to e Plan 07092016 TITLE Task 4	BUCKET To do	← C PROGRESS NotStarted	C Refresh ASSIGNED TO Alex Darrow	+ New CREATE	Task D BY ow A	Search ASSIGNED BY Alex Darrow		Group by	email K
Title 13 Description Add description Attachments	Zrinka Makov; Stocks Did anybody see t Anne Wallace Let's reschedule 1 My daughter will Anne Wallace Let's reschedule 1 Hi Katie	Move OneNote Moye to Clutter Ignore Junk Delete Archive Link Planner Task	Plan :	t task to link to e Plan 07092016 TITLE Task 4 Task from Outlook CL3	BUCKET To do To do To do	C     PROGRESS     NotStarted     InProgress	C Refresh ASSIGNED TO Alex Darrow	+ New CREATE Alex Dam Alex Dam	Task D BY ow A ow A ow	Search ASSIGNED BY Alex Darrow		Group by	email K
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Fig.1.12. Apps4. Pro Planner Outlook.

Please visit <u>https://support.apps4.pro</u> to get answers for frequently asked questions or reach to us at below email addresses.

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