# 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.
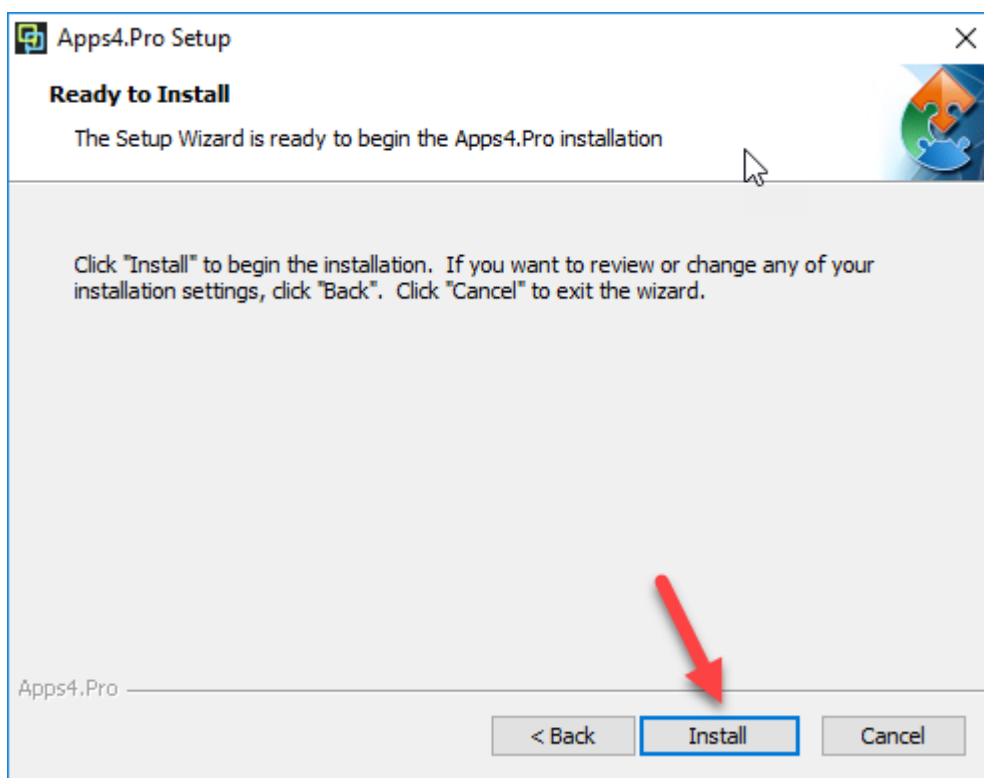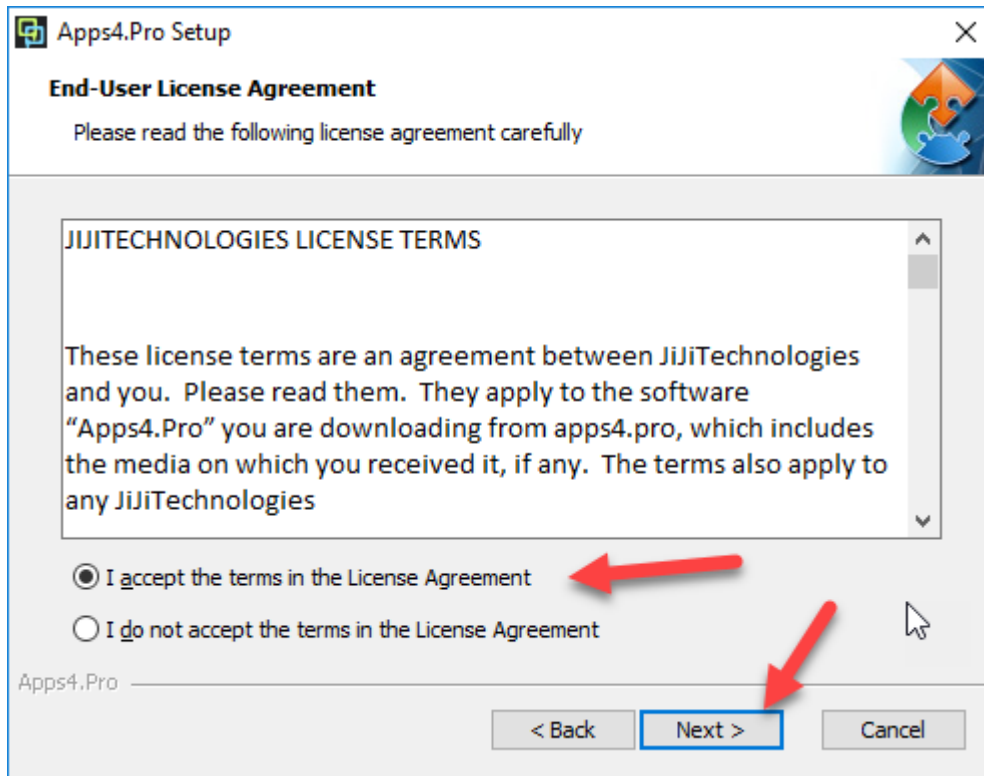
## Installation

### Step 1 – Download

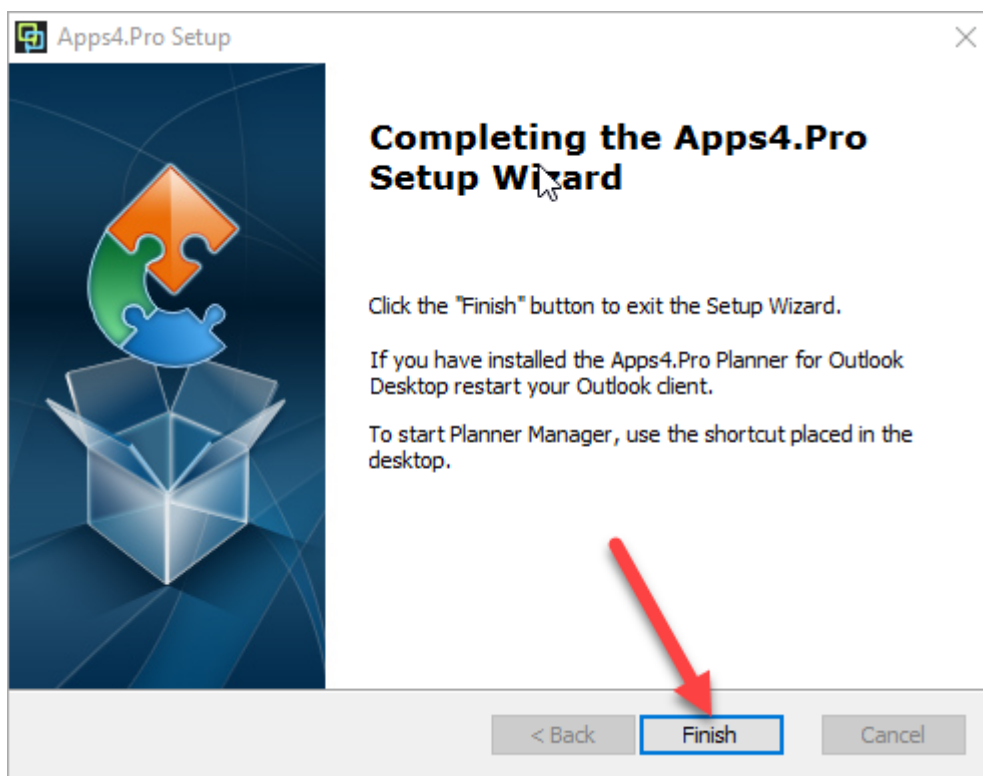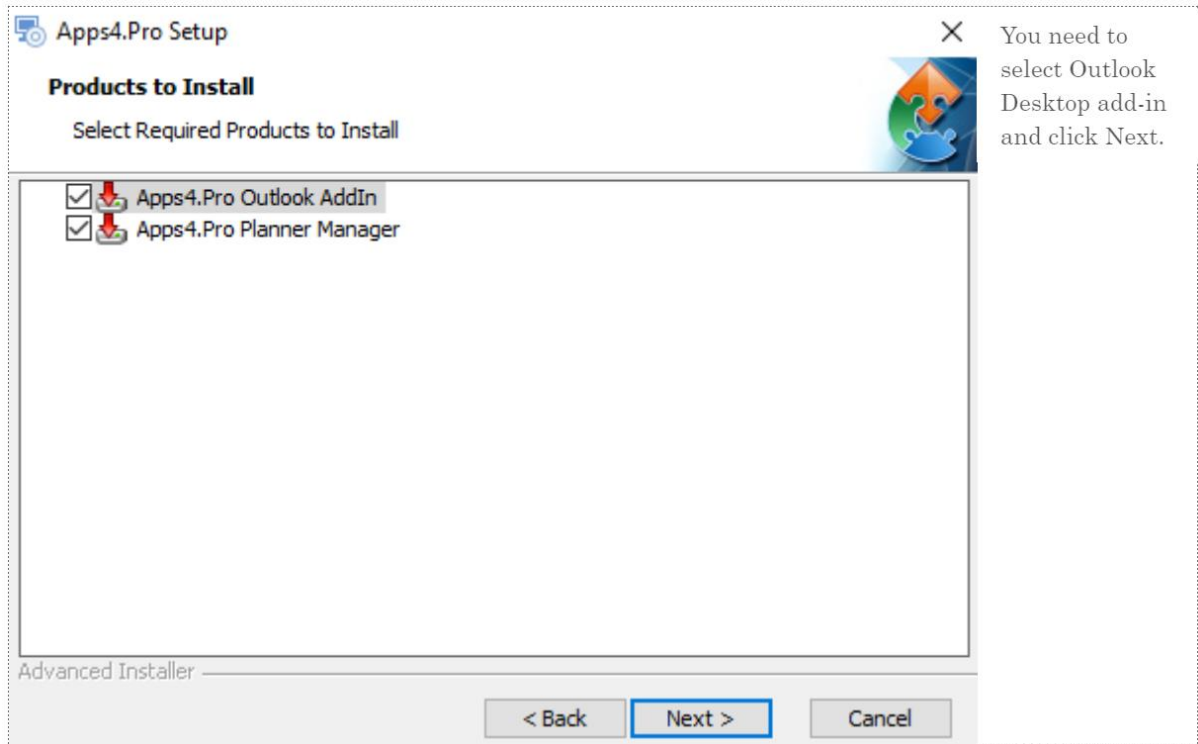Download Apps4.Pro Planner Outlook from https://apps4.pro/microsoft-planner-outlook-addin.aspx
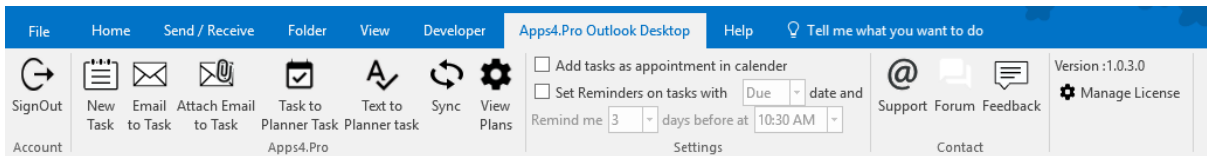
### Step 2 - Installation

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

Apps4Pro

Apps4.Pro Setup ✕

**End-User License Agreement**

Please read the following license agreement carefully

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[ < Back ]   [ **Next >** ]   [ Cancel ]

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Apps4.Pro Setup ✕

**Ready to Install**

The Setup Wizard is ready to begin the Apps4.Pro installation

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Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.

Apps4.Pro ─────────────────────────────────

[ < Back ]   [ **Install** ]   [ Cancel ]

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**Apps4Pro**

Apps4.Pro Setup ✕

**Products to Install**

Select Required Products to Install

☑ Apps4.Pro Outlook AddIn
☑ Apps4.Pro Planner Manager

Advanced Installer

[ < Back ]  [ Next > ]  [ Cancel ]

You need to select Outlook Desktop add-in and click Next.

Apps4.Pro Setup ✕

**Completing the Apps4.Pro Setup Wizard**

Click the "Finish" button to exit the Setup Wizard.

If you have installed the Apps4.Pro Planner for Outlook Desktop restart your Outlook client.

To start Planner Manager, use the shortcut placed in the desktop.

[ < Back ]  [ Finish ]  [ Cancel ]

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

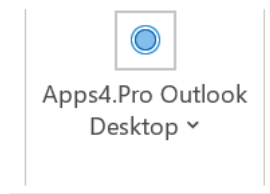Double click on the shortcut icon of Apps4.Pro Planner Outlook in your Outlook to start the app.



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Fig.1.1. Apps4. Pro Planner Outlook

### 2 – Sign in

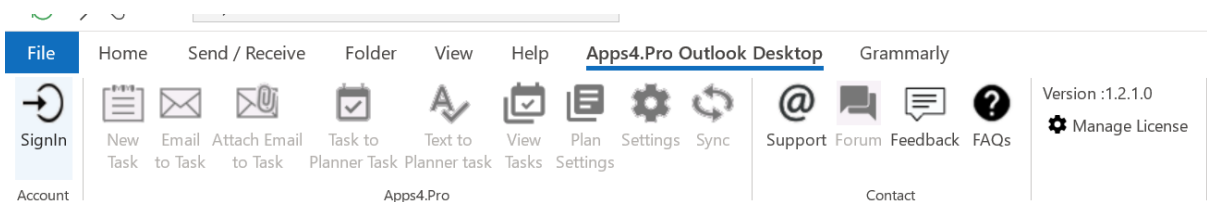Click on the sign-in and enter the username and password.
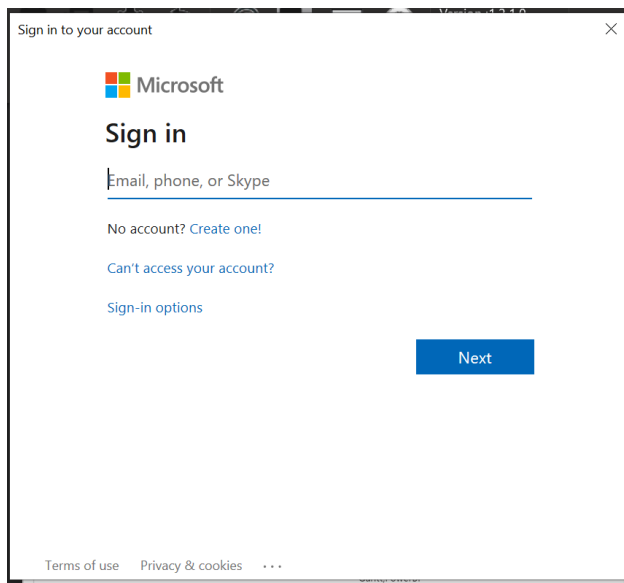


Fig.1.2. Apps4. Pro Planner Outlook

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,

- o Sync planner tasks assigned to me as outlook task
- o Add reminders
- o Do not override existing reminder time
- o Sync planner tasks assigned to me as appointments in calendar
- o 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"
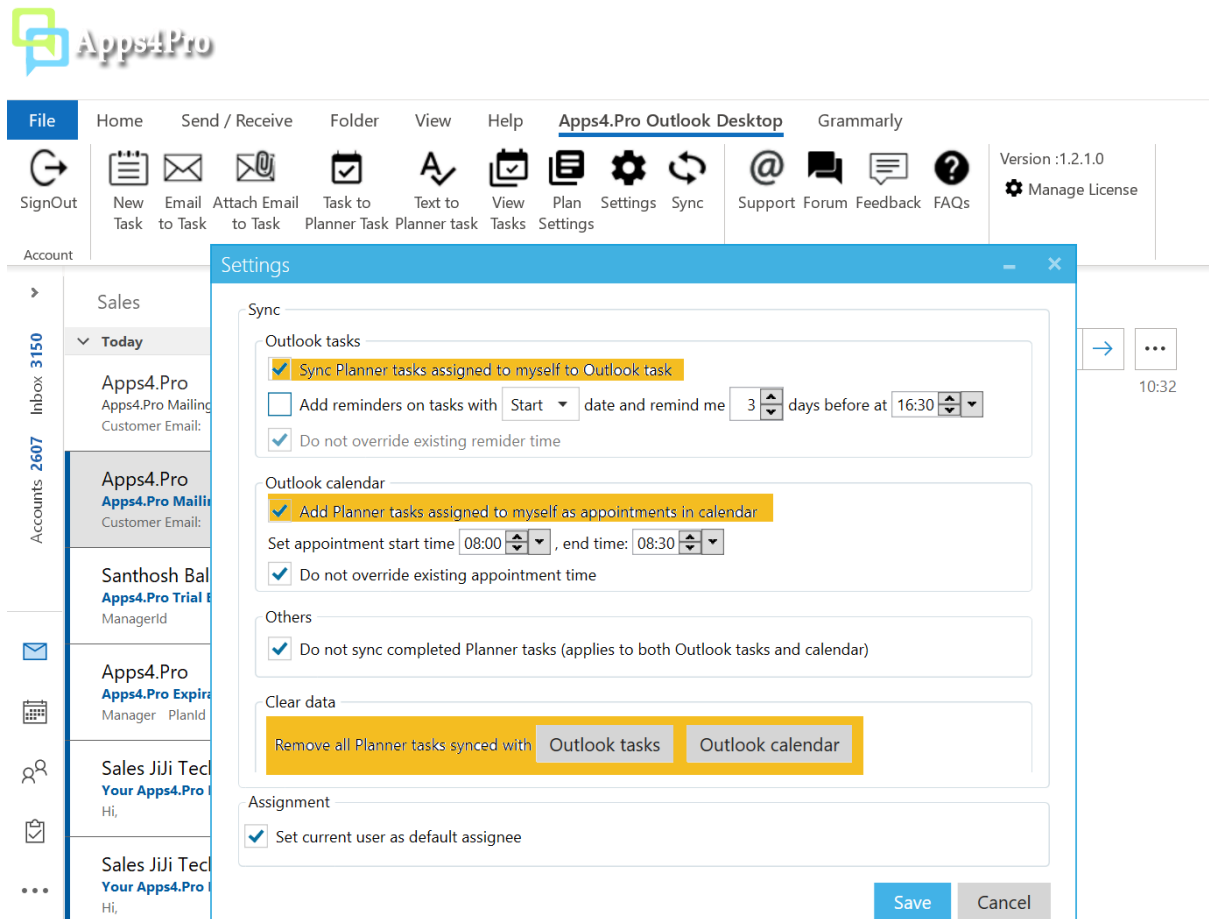
Fig.1.4. Apps4. Pro Planner Outlook.

## 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.
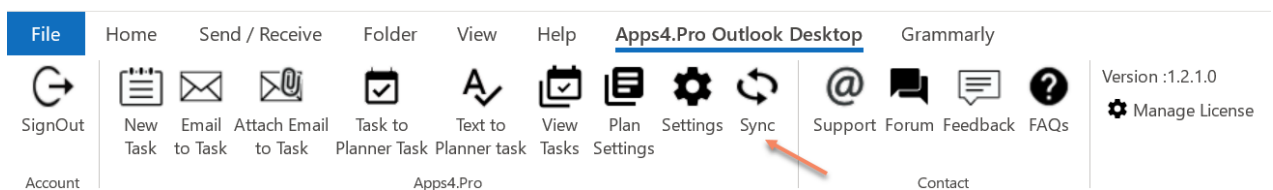


Fig.1.5. Apps4. Pro Planner Outlook.

## 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.
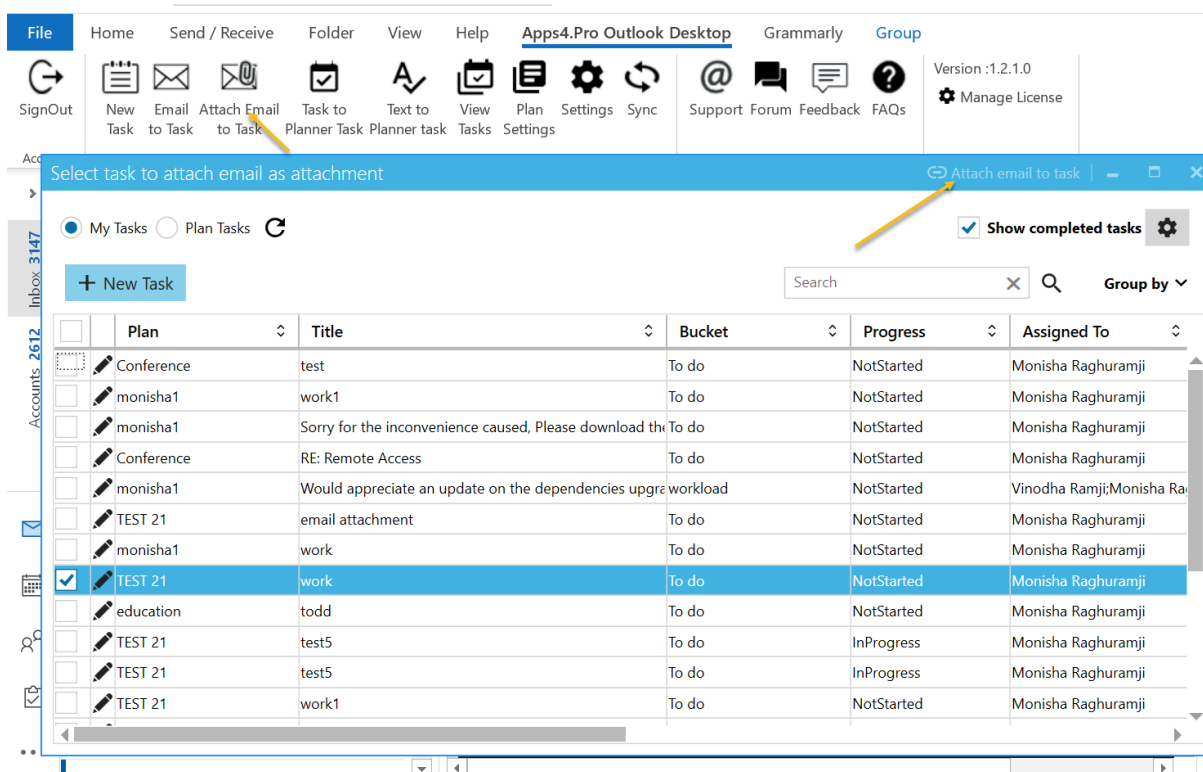
Fig.1.6. Apps4. Pro Planner Outlook.

## 6 - Sync Planner Tasks with Outlook Task

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.

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.
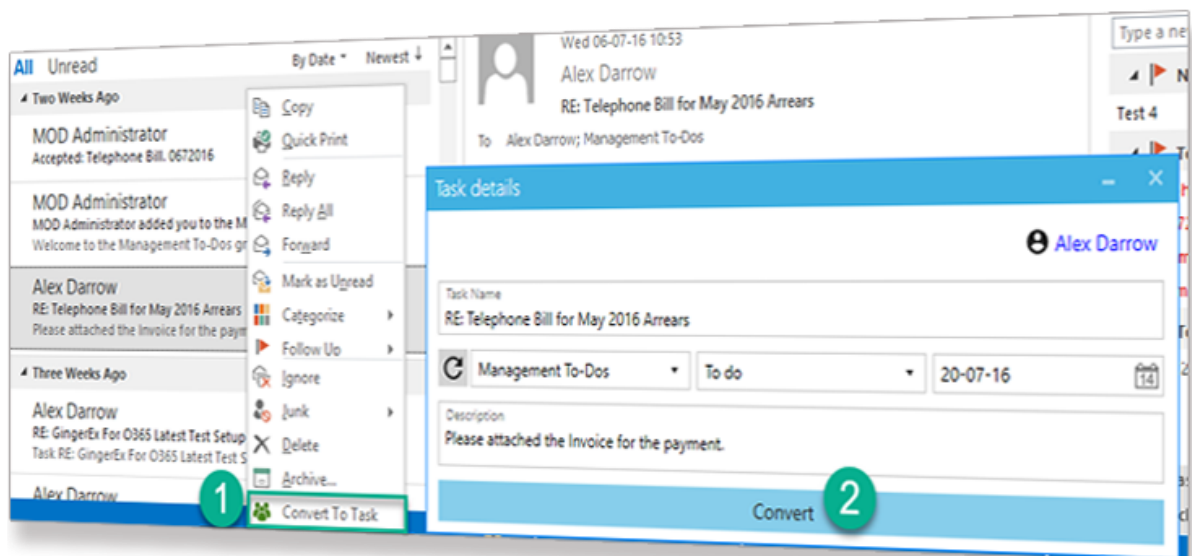


Fig.1.8. Apps4. Pro Planner Outlook.

## 8 - Convert Outlook Task to Planner task

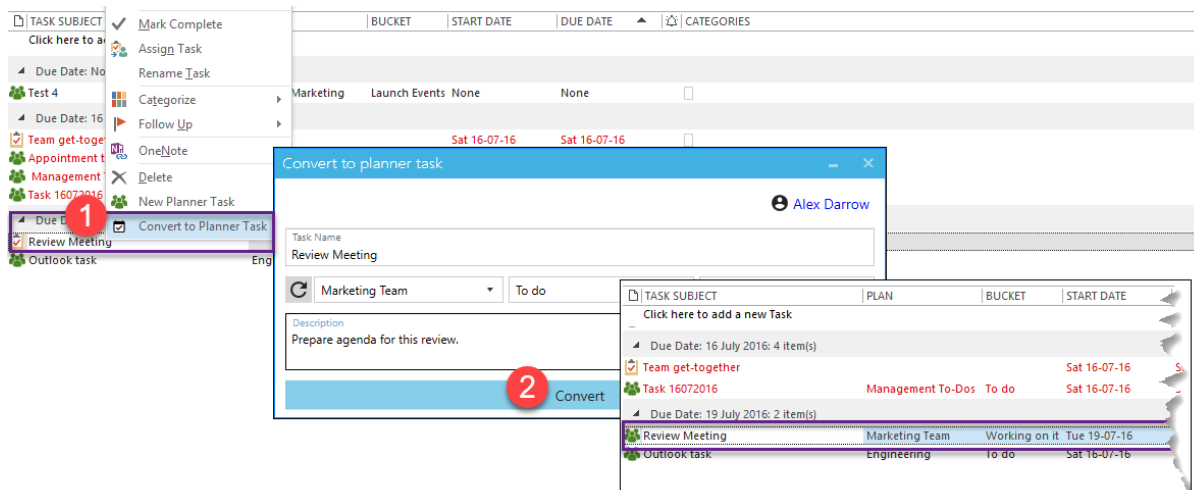Convert your existing outlook tasks into Planner task and group it to respective Plan / Bucket.

Fig.1.9. Apps4. Pro Planner Outlook.

## 9 - Create & Assign tasks from Highlighted text
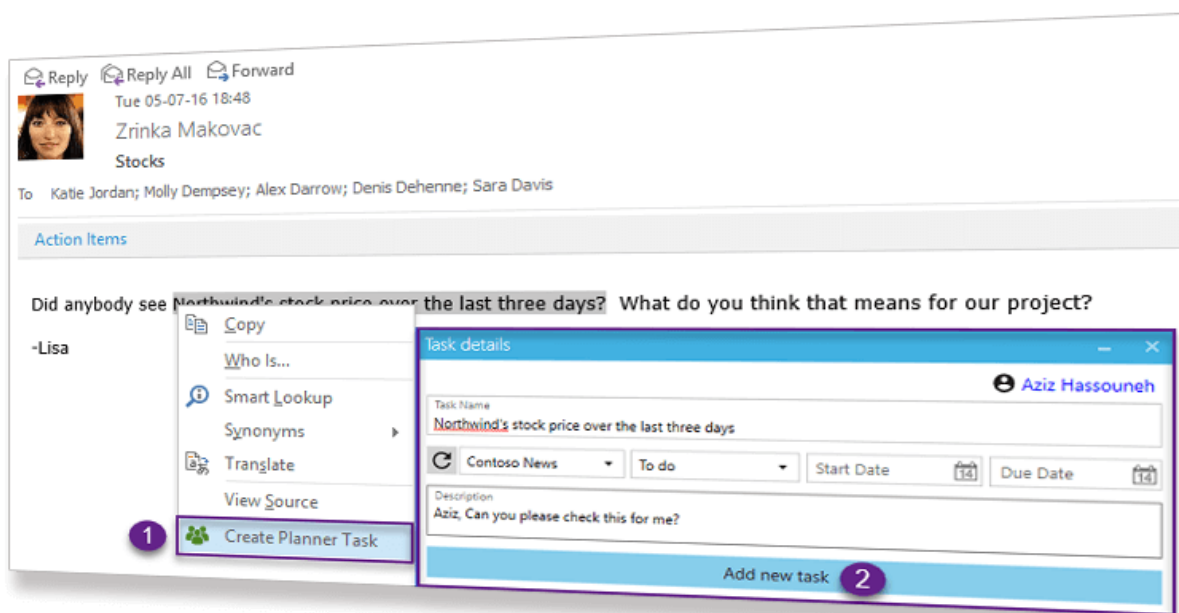


Fig.1.10. Apps4. Pro Planner Outlook.

## 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.
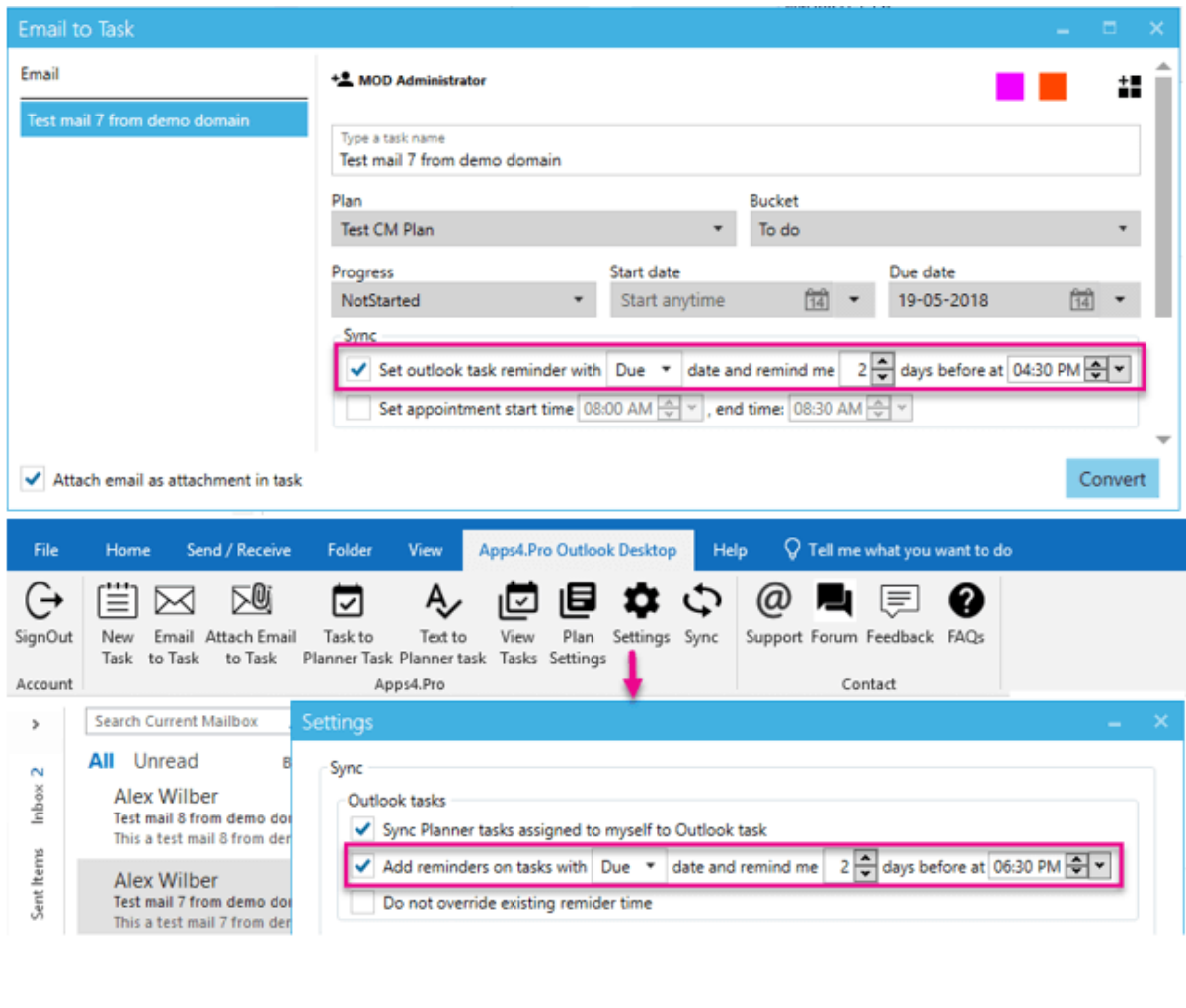
Fig.1.11. Apps4. Pro Planner Outlook.

## 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.
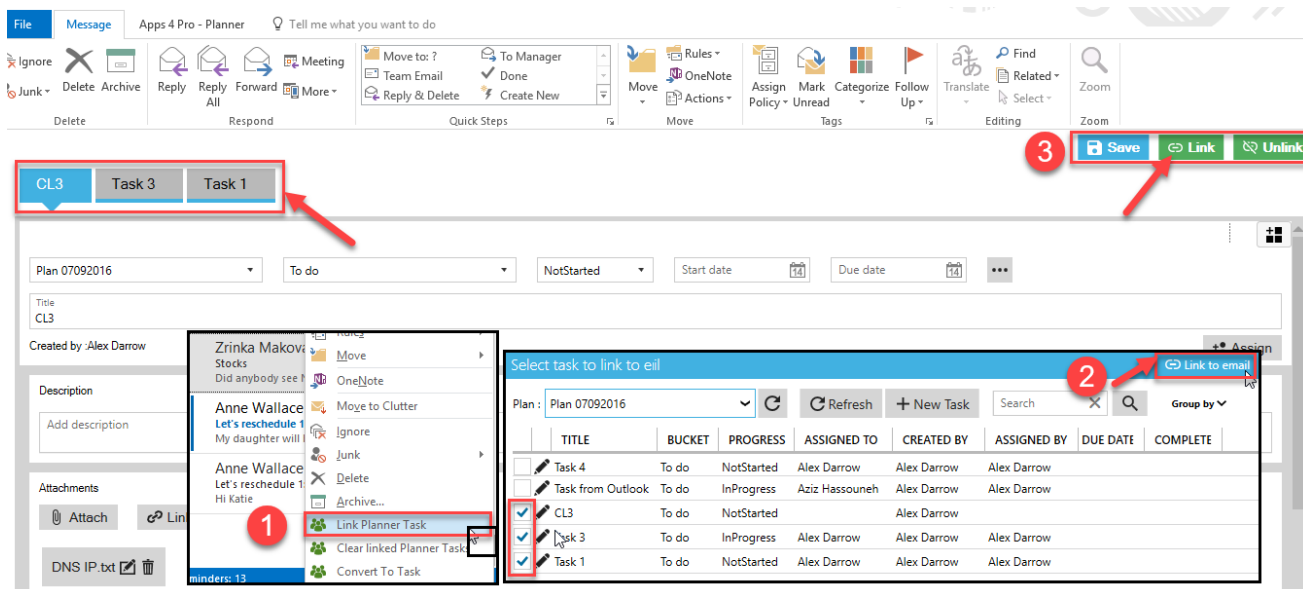


Fig.1.12. Apps4. Pro Planner Outlook.

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

Support@jijitechnologies.com

Sales@jijitechnologies.com