# Priority Matrix + Teams Set Up Guide

Project, Email, and Meeting Management to Help You Focus on What Matters Most

✓ **Microsoft 365 Security Certified**
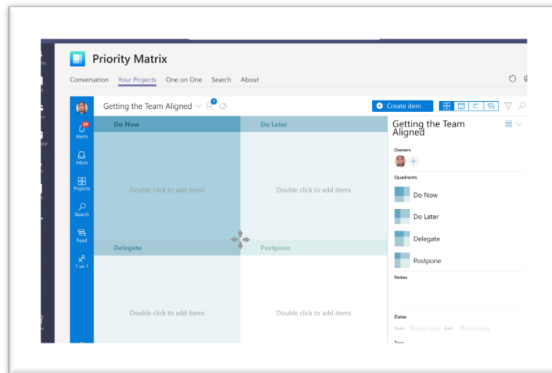
✓ **Microsoft Outlook Editor's Choice**

What is Priority Matrix?

- **SaaS for Managing Emails, Meetings and Project**
- Leading software for prioritization
- Email prioritization in Outlook
- Meeting agenda for Teams
- Central location for status updates
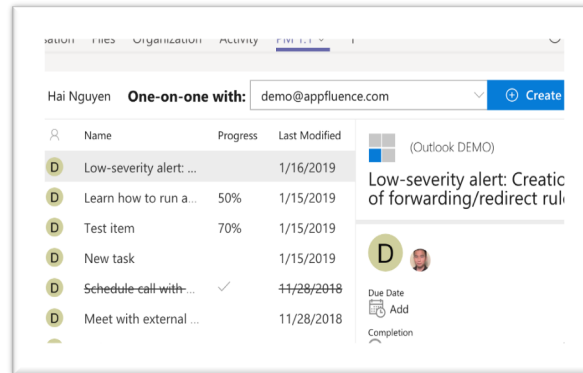- Version control and audit history

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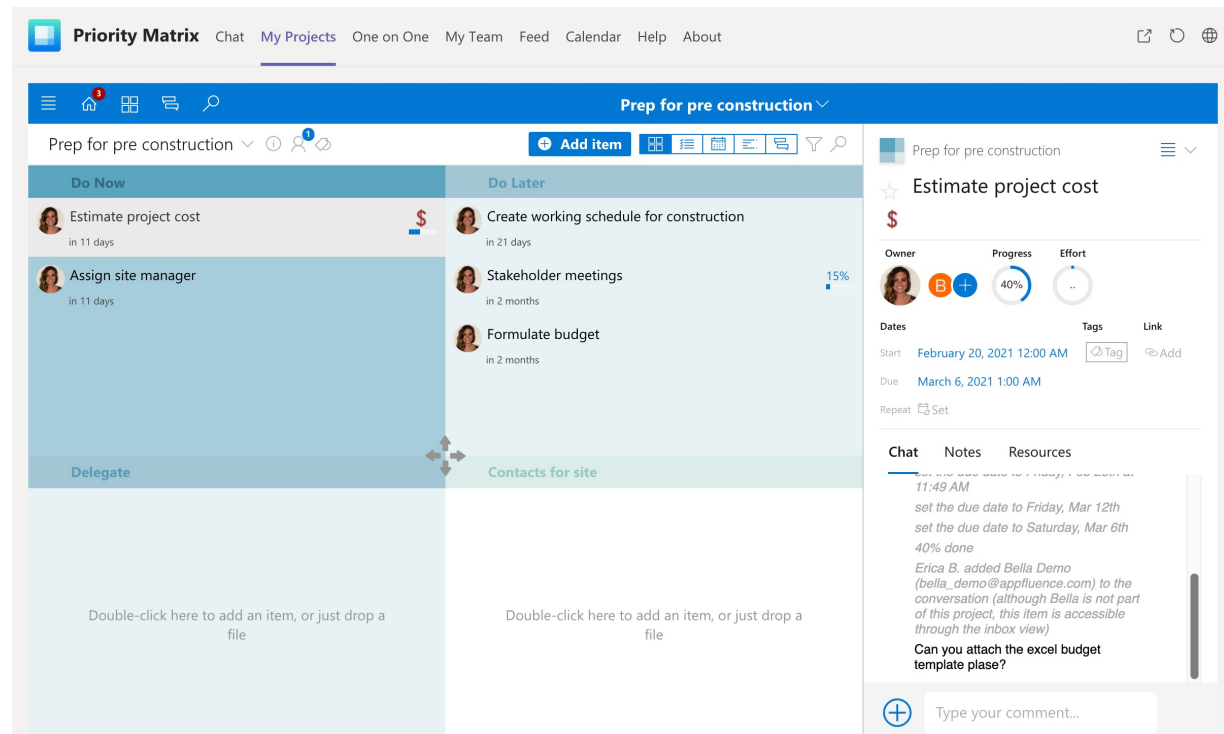
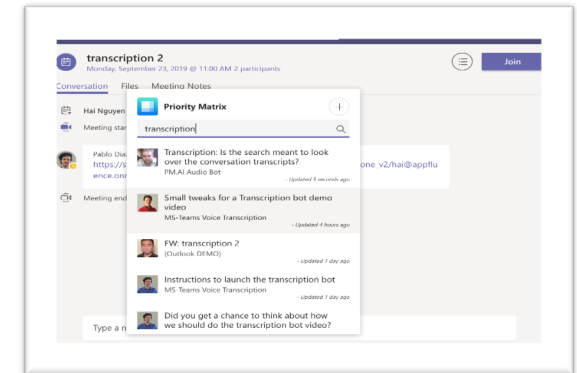# Prioritization is hard. Priority Matrix makes it easy.

Built for Teams

Seamless project management solution embedded inside Teams and Outlook without context switching.

One-on-One

Innovative visualization of shared tasks, files, and action items with team members across Graph and Priority Matrix.
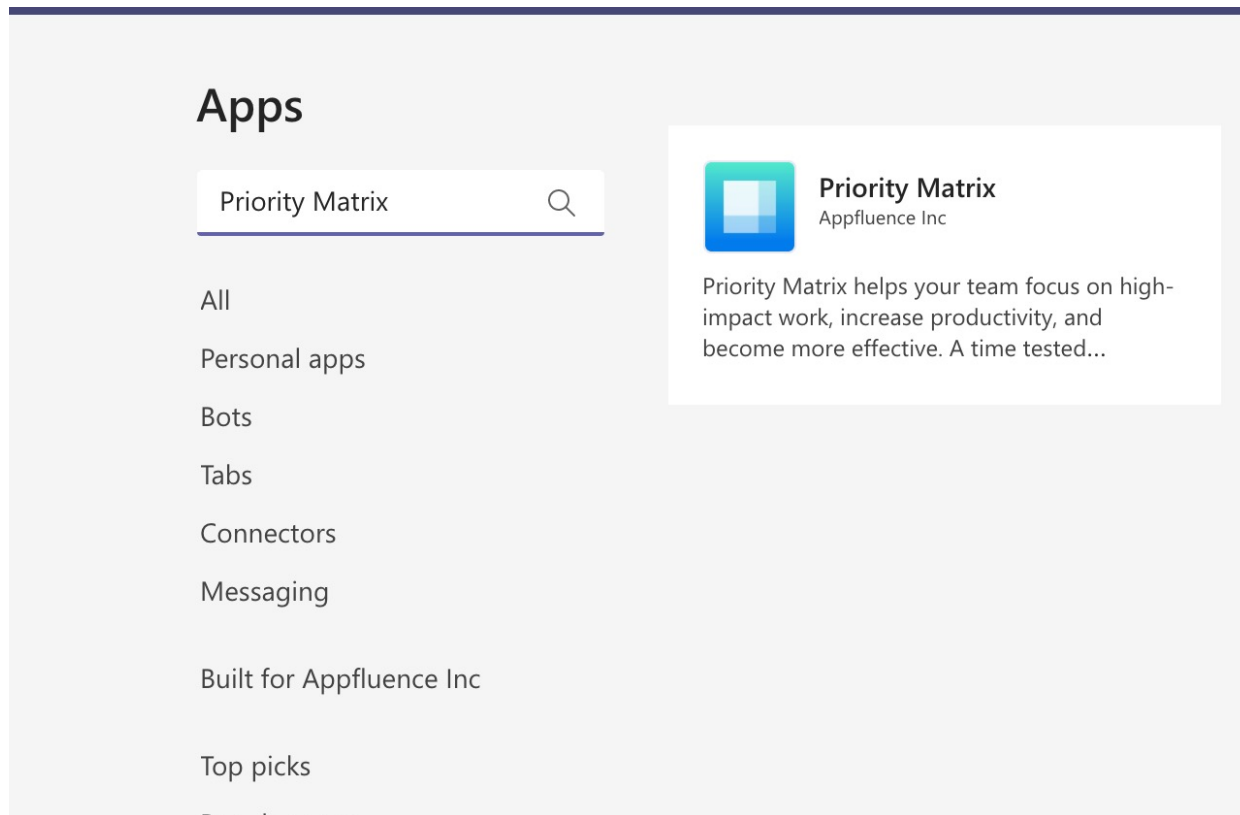

Contextual Intelligence

Surfaces tasks relevant to the email you're browsing or the conversation you're having so you can stay focused. Always.

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Installing Priority Matrix

- Installing Priority Matrix for Microsoft Teams:
  - https://sync.appfluence.com/accounts/get_teams/auto
  - How to use PM for Teams: https://youtu.be/G4gHss6_ISo

- Installing Priority Matrix for Outlook:
  - https://sync.appfluence.com/accounts/get_outlook/auto
  - How to use PM for Outlook: https://youtu.be/J_IbIuEJgpw

- Priority Matrix IT approval link (if needed):
  - https://admin.teams.microsoft.com/policies/manage-apps/5be2b320-a5b7-4221-893c-dee506e4e365
  - Priority Matrix is Microsoft 365 Security Certified

APPFLUENCE

Step 1: Find Priority Matrix in Teams App Store

Apps

Priority Matrix 🔍

All

Personal apps

Bots

Tabs

Connectors

Messaging

Built for Appfluence Inc

Top picks

Priority Matrix
Appfluence Inc

Priority Matrix helps your team focus on high-impact work, increase productivity, and become more effective. A time tested...

- Tenant search for Priority Matrix in Teams add-in store

- If Priority Matrix is not found, IT might have to approve the app at this admin link.

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Step 1*: IT Approval for Priority Matrix

- **Microsoft 365 Security Certified**
- IT can approve Priority Matrix for an organization at:
- https://admin.teams.microsoft.com/policies/manage-apps/5be2b320-a5b7-4221-893c-dee506e4e365

APPFLUENCE

Step 2: Using Priority Matrix in Teams App Store
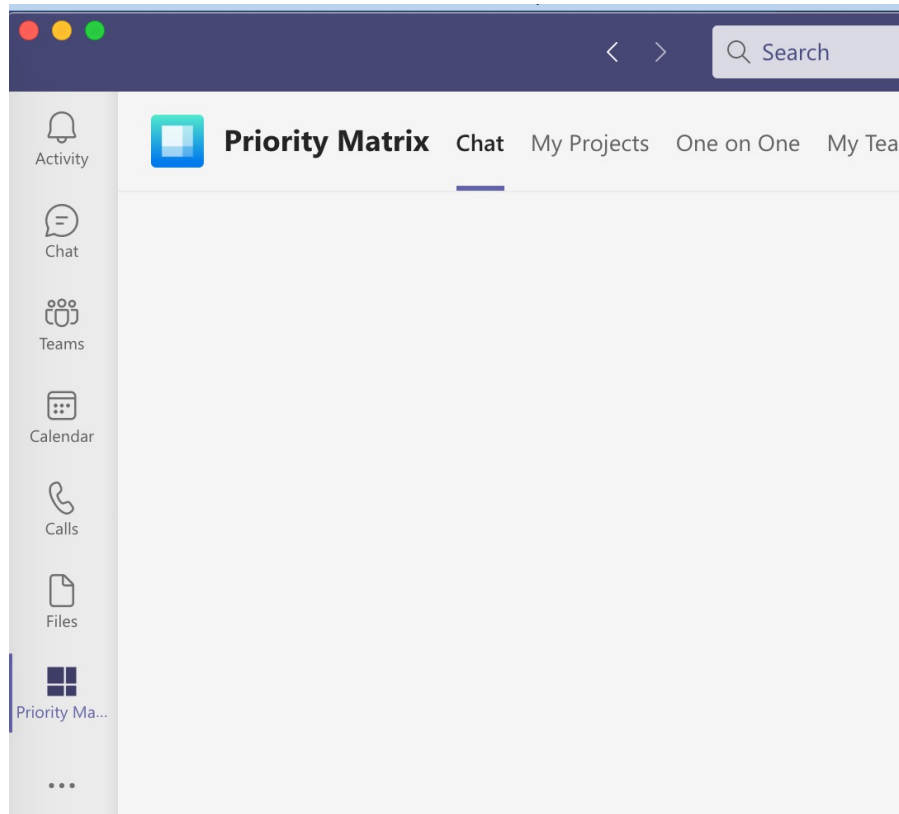
- Open the Priority Matrix app, then pin it to the left hand bar

- Then click on "My Projects" to use Priority Matrix for project management

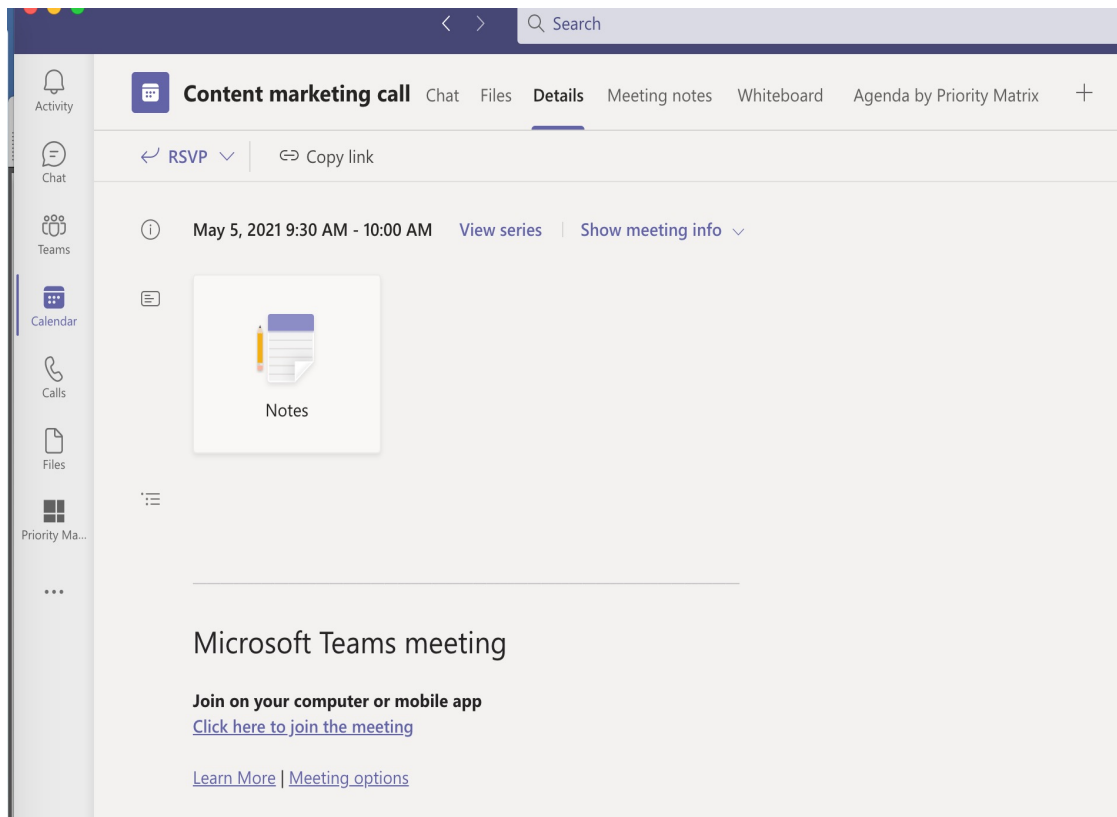APPFLUENCE

Step 3*: Using Priority Matrix for Project Management

Project Management Software for Microsoft Teams
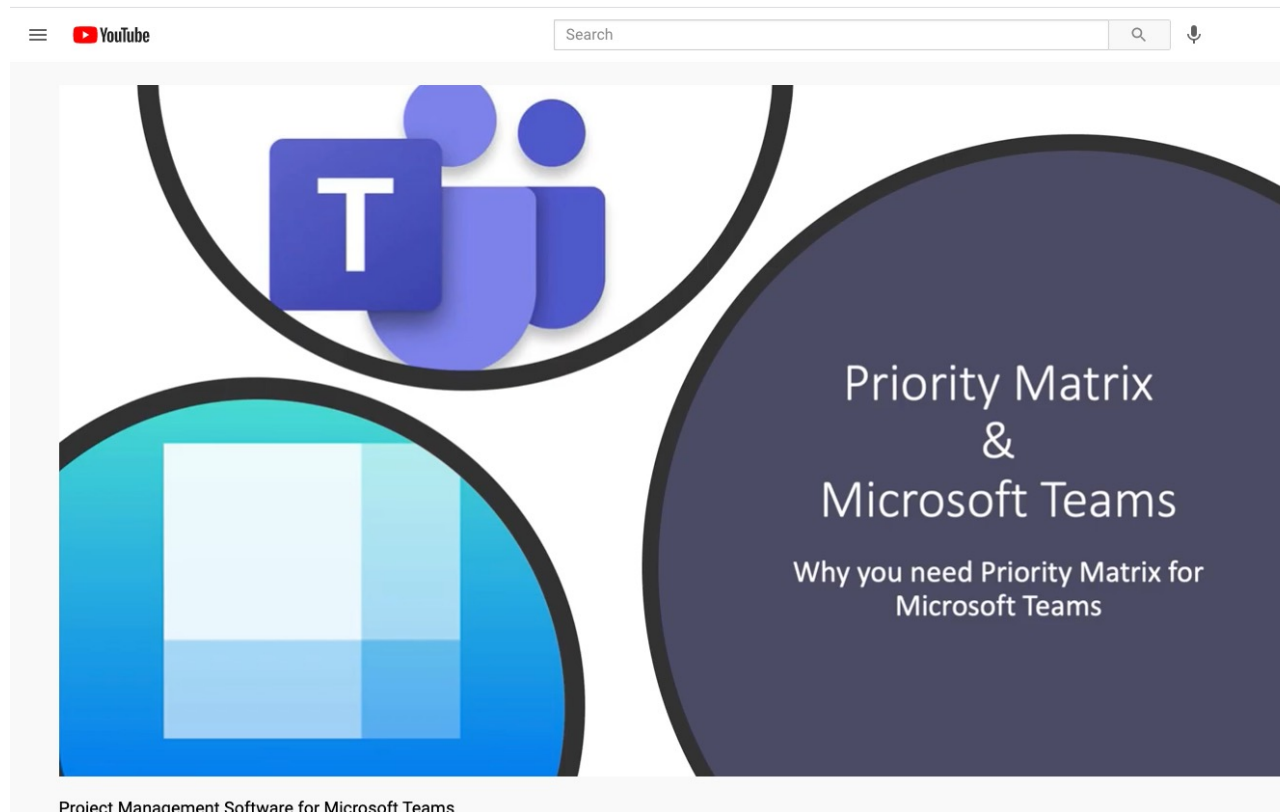
- Watch quick introduction video on how to use Priority Matrix for Microsoft Teams:
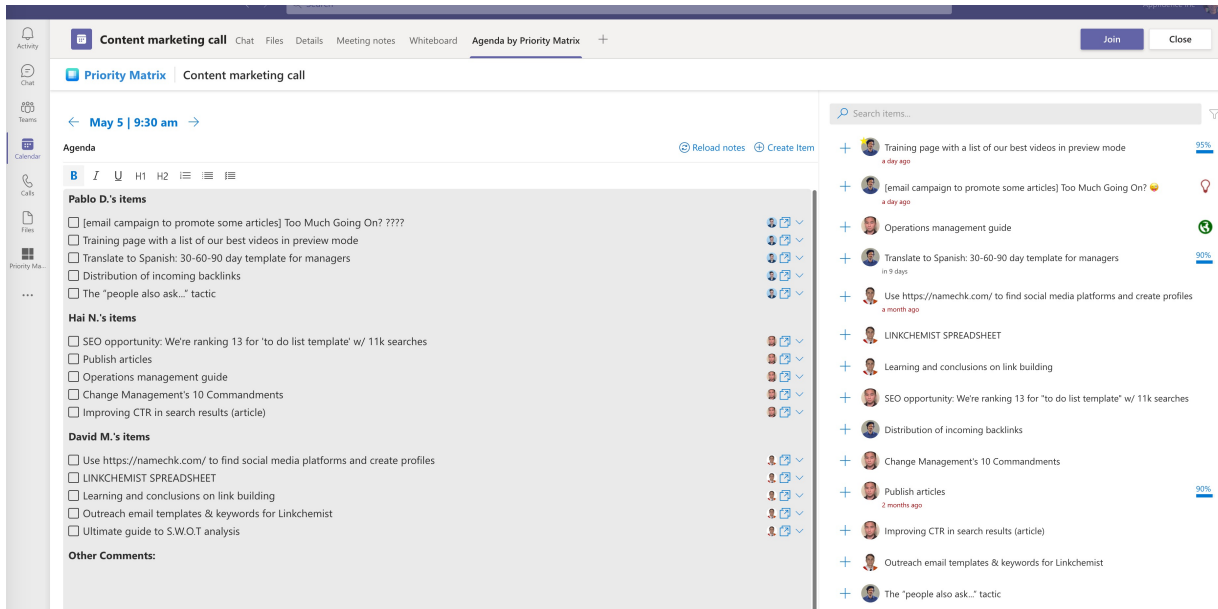
- https://youtu.be/G4gHss6_ISo

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Step 4: Adding Priority Matrix to a Meeting

- In a Teams meeting event, click on the + icon on the top and add "Priority Matrix"

- "Agenda by Priority Matrix" will then be added to a meeting

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Step 4*: Using Agenda by Priority Matrix

- Agenda by Priority Matrix automatically prefills tasks from Priority Matrix relevant to the people in the call

- You can also create new tasks during your meetings and assign it to people automatically

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Step 5: Adding Priority Matrix to Outlook

- Click on "Get Add-ins" from Top Bar of Outlook
- Search for Priority Matrix in Outlook's add-in Store
- Add Priority Matrix
- Sign-in using Microsoft SSO
- Open an email and PIN Priority Matrix

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Step 5*: Using Priority Matrix to Outlook
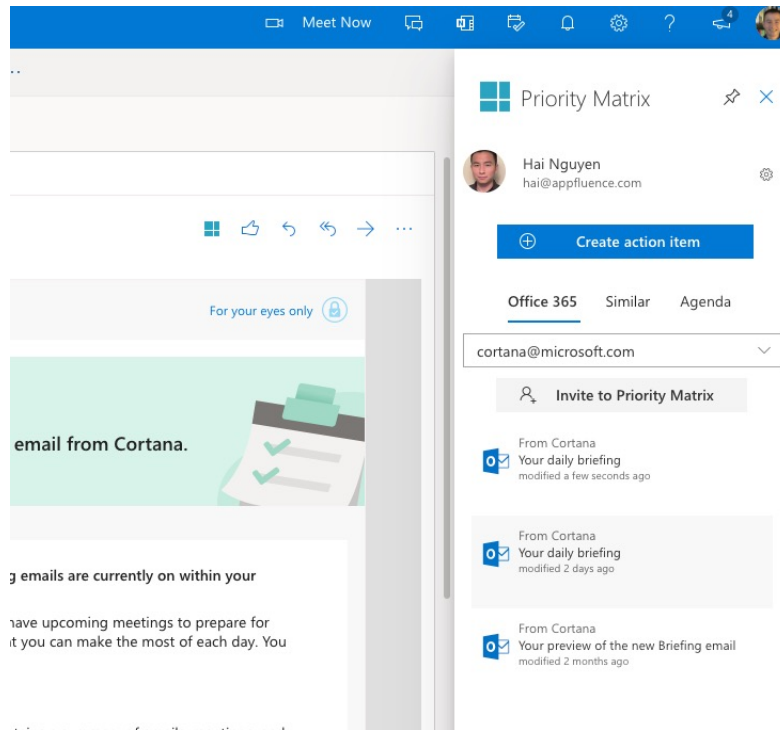
- Open an email and click on Priority Matrix to see:
  - Other emails from the same person
  - Relevant tasks to the email
  - Upcoming meetings with this person

- Click on the "PIN" icon on the top right to pin Priority Matrix so when you open a new email, context is provided

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Step 5*: Using Priority Matrix to Outlook

Project Management with Office 365 & Priority Matrix

- Watch a quick video on how to use Priority Matrix for Outlook:

- https://youtu.be/J_lbIuEJgpw

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Demo Credentials / License Requirements

- How can we demo the app? What licenses are required to use it?
  - Completely free to demo / pilot
  - Use your Microsoft SSO sign-on to automatically activate a trial with full features
  - Get started at https://appfluence.com

- Licensing options
  - Standard pricing: $24/user/month or Business tier
  - Pricing for Office 365 users: $9/user/month for Business tier
  - Fixed site-wide / enterprise pricing negotiable

- Enterprise features
  - Mandated SSO, single-tenant Azure deployment, PowerApps integrations, Custom reports

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Contact

- CSP Partner Lead
  - Hai Nguyen, hai@appfluence.com

- Learn more and book a call with me at
  - https://appfluence.com/csp

- Video: Priority Matrix for Microsoft Teams
- Video: Everything You Need to Know About PM in 3 Minutes

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