A photograph of two women sitting on a grey sofa in a modern office environment. They are looking at a laptop together. The woman on the right is wearing glasses and a blue jacket, while the woman on the left is wearing a black top. The background shows a bright, open-plan office with glass walls and a staircase.

# Priority Matrix + Teams Set Up Guide

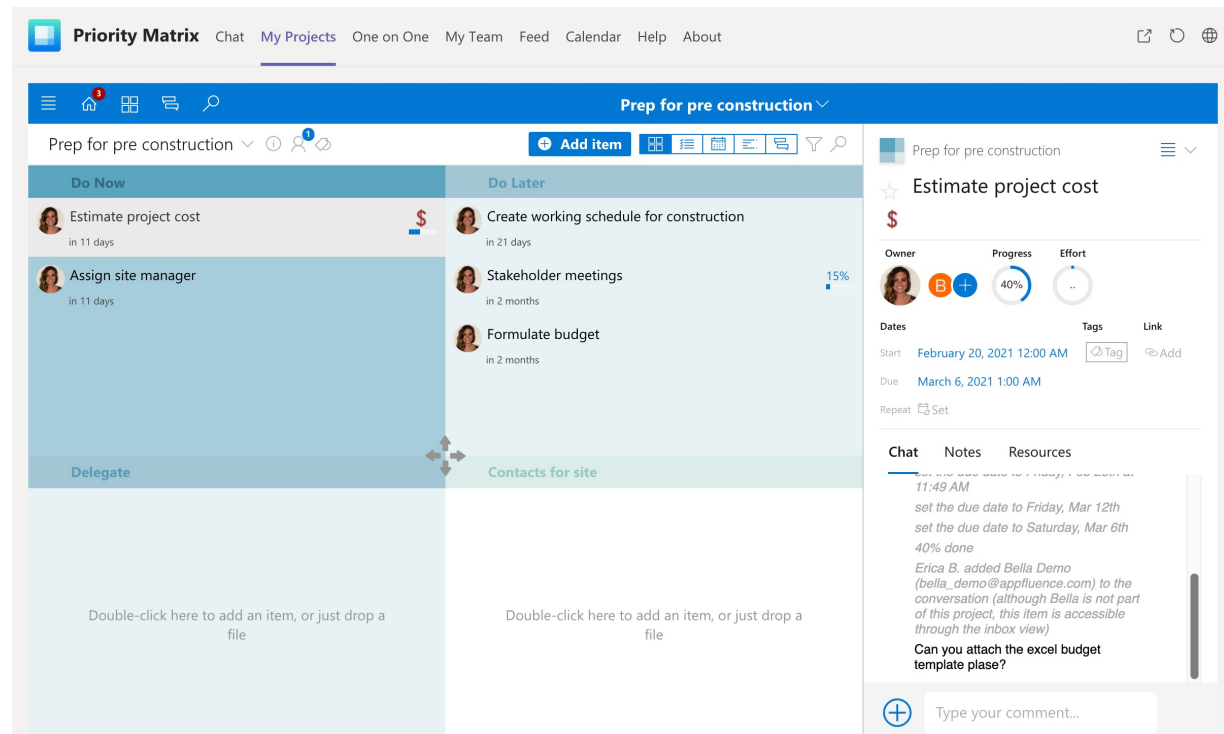
Project, Email, and Meeting Management to Help You Focus on What Matters Most

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

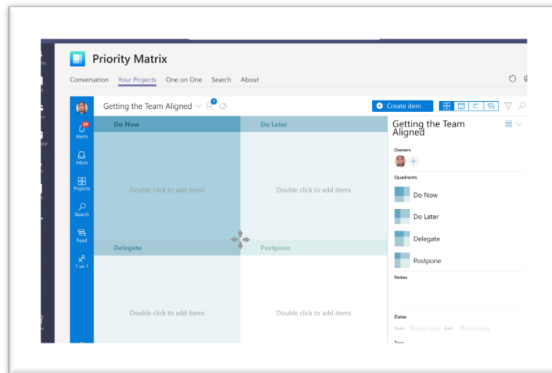


# What is Priority Matrix?

- **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

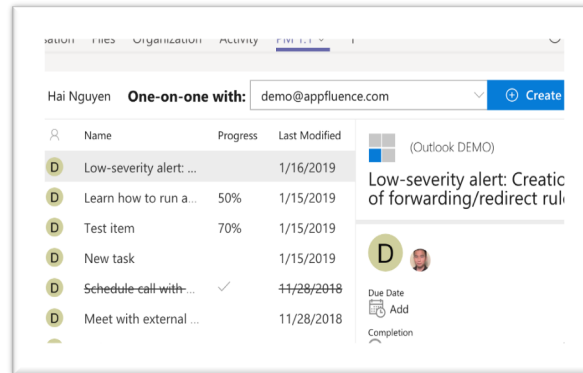


# Prioritization is hard. Priority Matrix makes it easy.



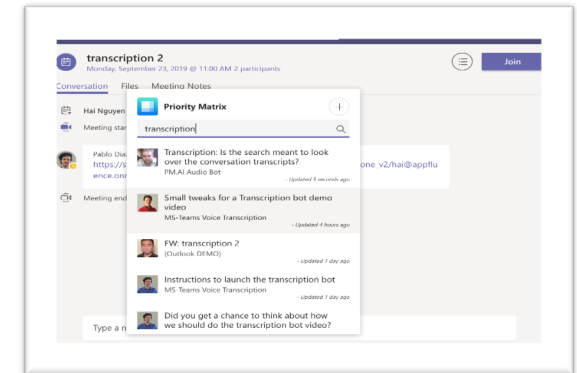
## Built for Teams

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.



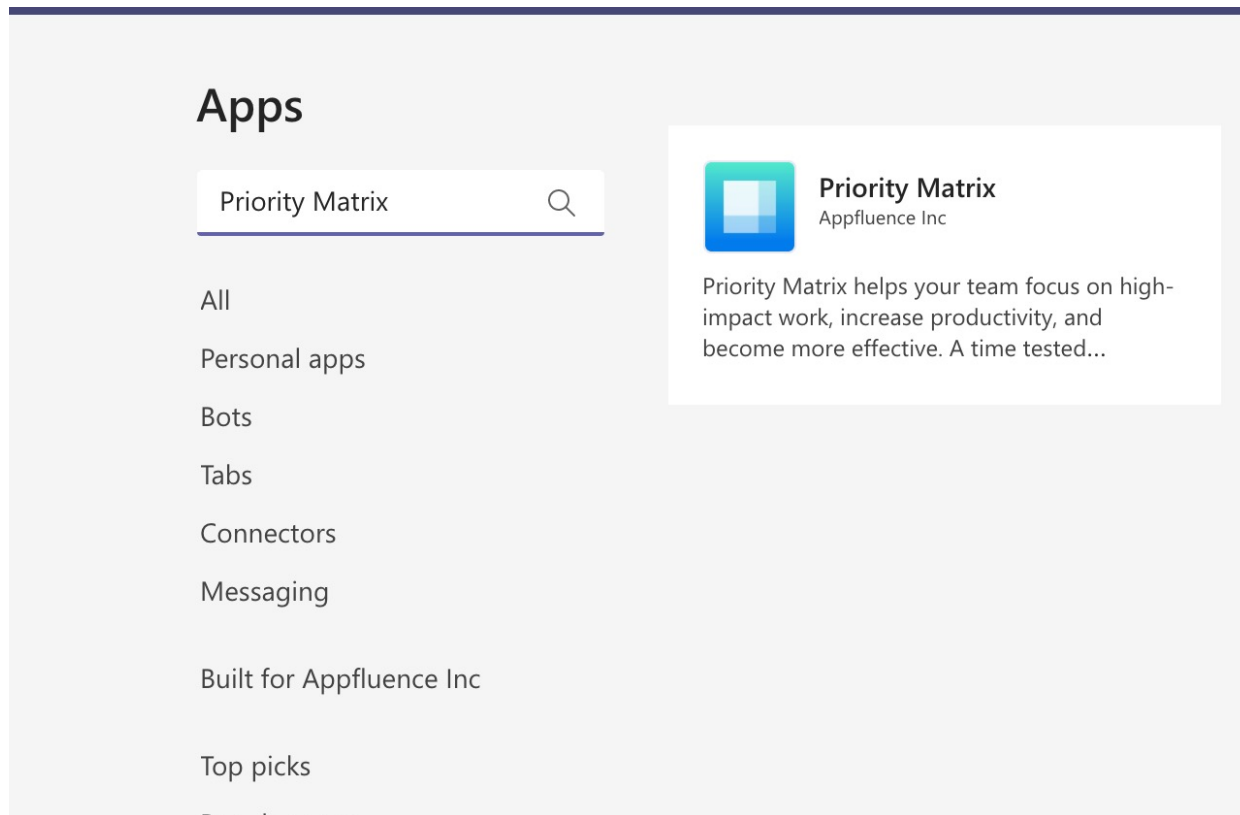
## Contextual Intelligence

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

# Installing Priority Matrix

- Installing Priority Matrix for Microsoft Teams:
  - [https://sync.appfluence.com/accounts/get\\_teams/auto](https://sync.appfluence.com/accounts/get_teams/auto)
  - How to use PM for Teams: [https://youtu.be/G4gHss6\\_ISo](https://youtu.be/G4gHss6_ISo)
- Installing Priority Matrix for Outlook:
  - [https://sync.appfluence.com/accounts/get\\_outlook/auto](https://sync.appfluence.com/accounts/get_outlook/auto)
  - How to use PM for Outlook: [https://youtu.be/J\\_lbluEJgpw](https://youtu.be/J_lbluEJgpw)
- 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](#)

# Step 1: Find Priority Matrix in Teams App Store



- 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](#).

# Step 1\*: IT Approval for Priority Matrix

Microsoft Teams admin center

Manage apps \ Priority Matrix

**Priority Matrix**  
Appfluence Inc

Status  Allowed

Version **1.0.39**  
By using this app, your users agree to the Privacy policy and Terms of use.

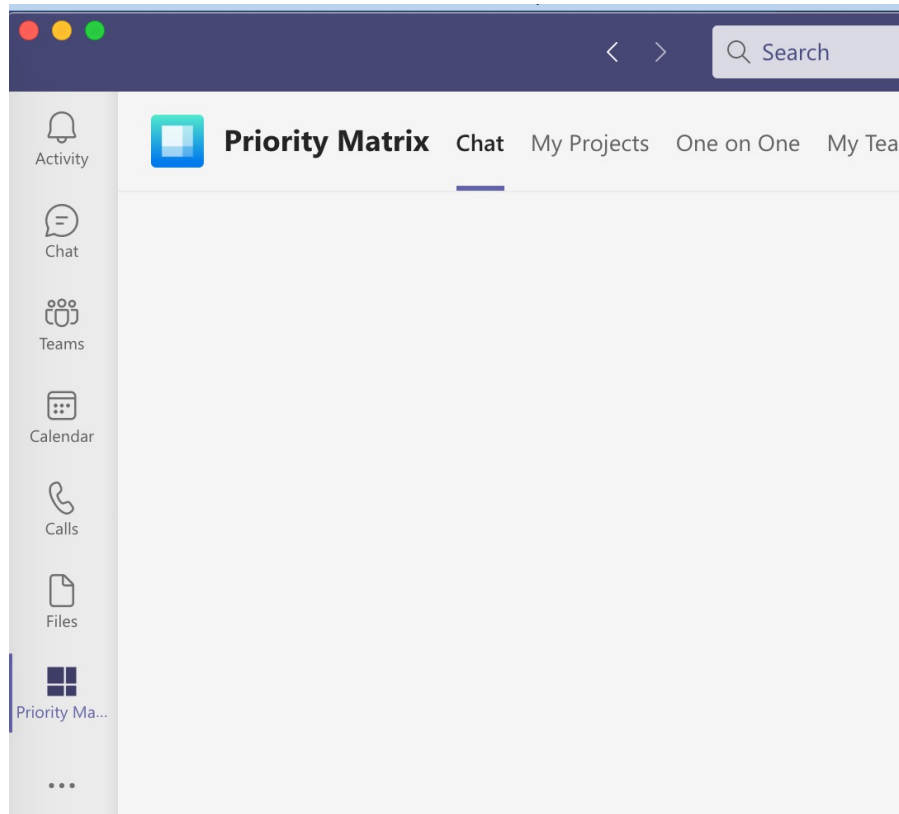
About Permissions Settings Plans and pricing

**Details**

Short name	Categories	Certification
Priority Matrix	Productivity, Project management, Workflow & business management	Microsoft 365 certified
Short description	Scope	App ID
Focus on high-impact tasks. Do the work that matters.	Personal, Team, Group chat	5be2b320-a5b7-4221-893c-dee506e4e365
Publisher	Privacy policy URL	Website URL
Appfluence Inc	<a href="https://appfluence.com/privacy">https://appfluence.com/privacy</a>	<a href="https://appfluence.com">https://appfluence.com</a>
Terms of use URL	Full description	
<a href="https://appfluence.com/eula">https://appfluence.com/eula</a>	Priority Matrix helps your team focus on	

- **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>

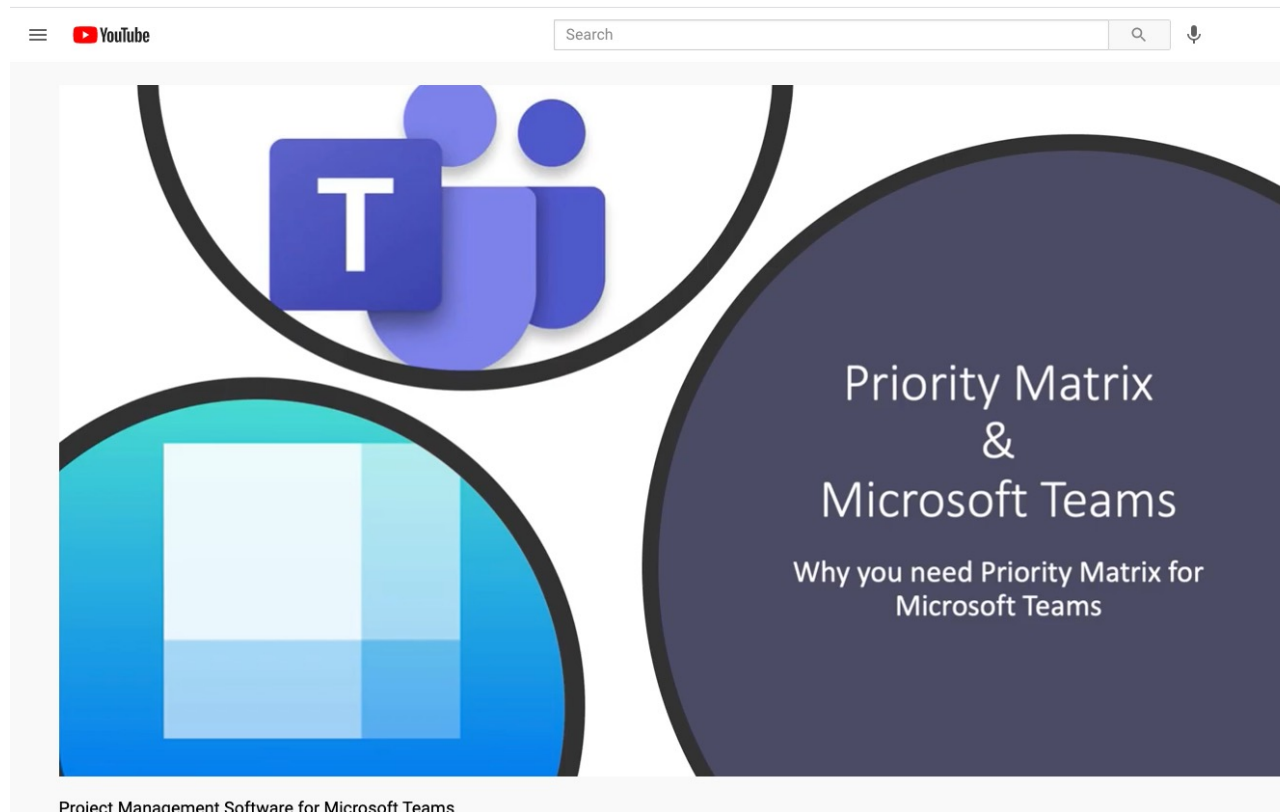
## Step 2: Using Priority Matrix in Teams App Store



- 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



# Step 3\*: Using Priority Matrix for Project Management

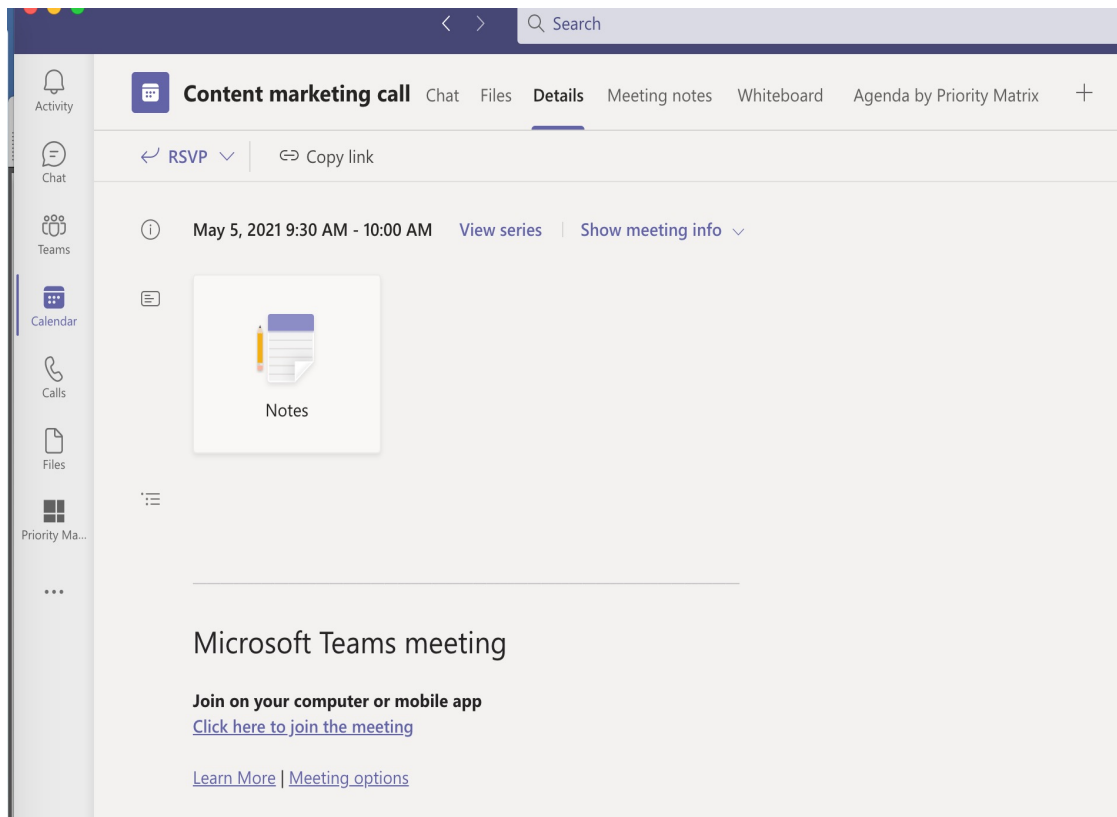


- Watch quick introduction video on how to use Priority Matrix for Microsoft Teams:
- [https://youtu.be/G4gHss6\\_Iso](https://youtu.be/G4gHss6_Iso)

Project Management Software for Microsoft Teams

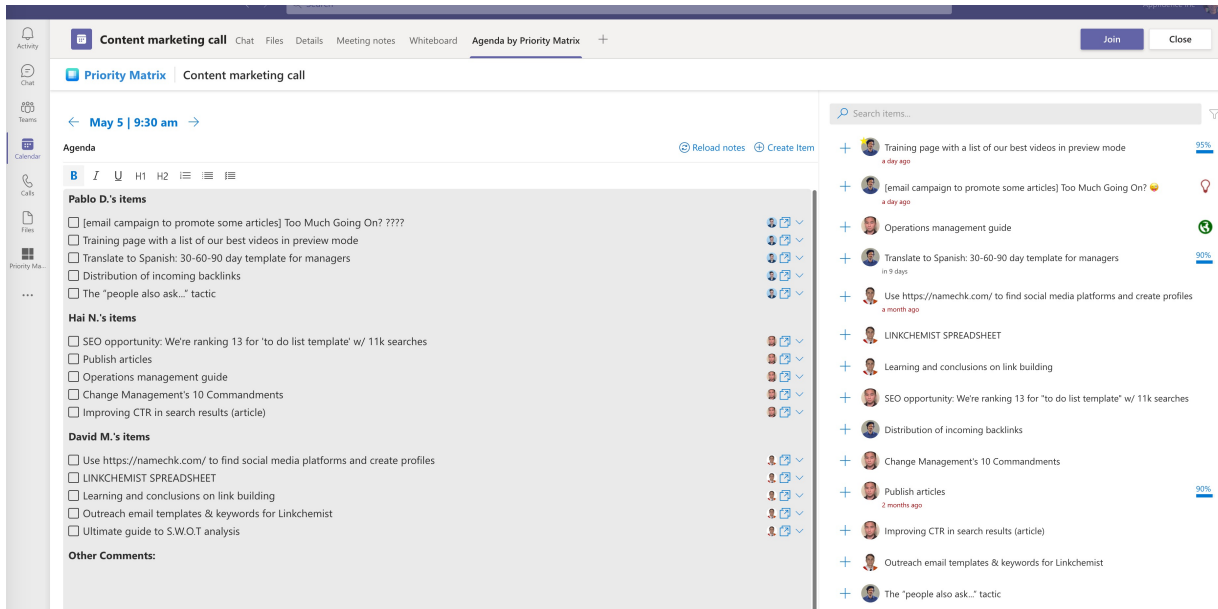


## Step 4: Adding Priority Matrix to a Meeting



- 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

# 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

# Step 5: Adding Priority Matrix to Outlook

## Add-Ins for Outlook

Add-ins may access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy.

All







My add-ins

Admin-managed



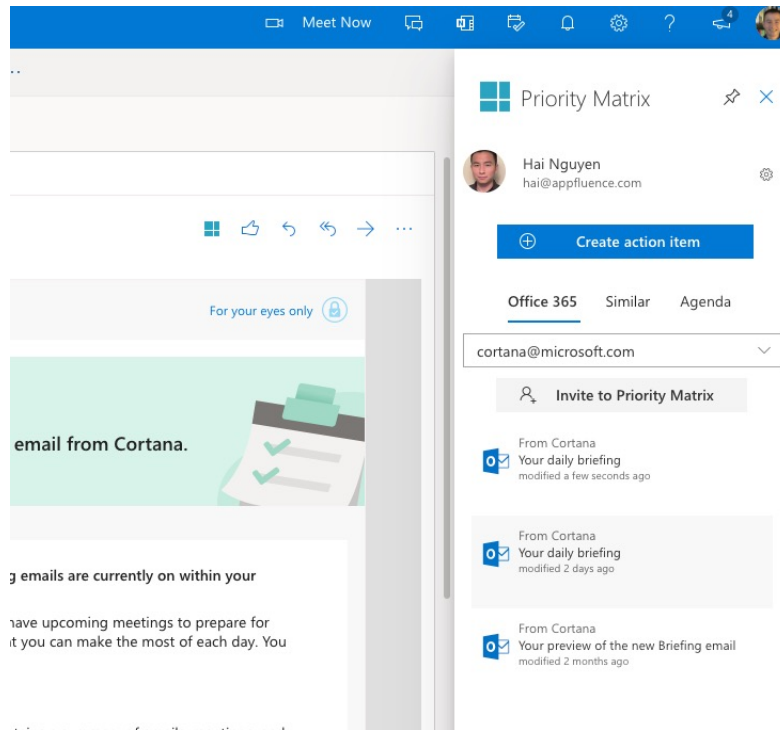
Editor's Choice

We recommend this great collection of add-ins for you to get started.

 <p><b>Priority Matrix: Turn emails into tasks</b> ★★★★☆</p> <p>Create and prioritize tasks from email. Access contextually relevant items. Free to use in Outlook.</p> <p>May require additional purchase</p> <p><a href="#">Add</a></p>	 <p><b>Tasks in a Box for Outlook</b> ★★★★☆</p> <p>Always stay on top of your inbox. Snooze emails and turn them into tasks.</p> <p>May require additional purchase</p> <p><a href="#">Add</a></p>	 <p><b>Office+ Help On-Demand</b> ★★★★☆</p> <p>View step-by-step instructions and video guides for dozens of common actions in Microsoft Outlook.</p> <p>Free</p> <p><a href="#">Add</a></p>
 <p><b>RevenueInbox for Salesforce</b> ★★★★★</p> <p>#1 Salesforce integration solution that actually works. Salesforce</p>	 <p><b>Trustifi for Outlook – Secure and Productive</b> ★★★★★</p> <p>Get true email power with encryption, controlling, tracking and</p>	 <p><b>XING ProBusiness</b> ★★★★★</p> <p>The add-in from XING gives you instant access to the XING profile</p>

- 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

# 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

# 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\\_IbluEJgpw](https://youtu.be/J_IbluEJgpw)

# 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

# Contact

- CSP Partner Lead
  - Hai Nguyen, [hai@appfluence.com](mailto: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](#)