

My system for syncing is designed to get my tasks out of Achieve Planner and into Toodledo on my iPhone using Outlook with CodeTwo plugin as an intermediary. I have a free account with Toodledo online, and I access it on my iPhone using the Toodledo app.

As you explore this, you may find additional ideas to make this work better for you based on your own circumstances. My methods are design to work around my unique set of constraints, which are described below.

I work for a state government which controls everything I download onto my computer at work. Fortunately, I already had my Achieve Planner (AP) on my system when the security hammer came down, so I am able to use it at work and on my machines at home. So, I can't download the free CodeTwo plugin for Outlook that Rodger suggested and which I would need to perform the sync on my machine at work. Instead, I have downloaded it to my netbook. My workaround is simple, though. When I've updated my AP on my work machine, I just copy the AP data file onto a stick drive and replace the file on my netbook and vice versa. A two-minute step before I begin each day keeps everything current...an easy habit to develop. The main point here is that you can easily get your AP fields into Outlook through AP's sync functions (they become user-defined fields in Outlook). But, you'll need the CodeTwo plugin for Outlook to get export any user-defined fields out of Outlook for upload into TD.

I use the Outlook program on my netbook as an intermediary only. In other words, I don't actively use it for email, task management, etc., just as a vehicle to transfer tasks back and forth from AP to my iPhone and vice versa. I don't need it for email b/c when I'm away from my desk at work, I can get my email through my iPhone. So, for simplicity and to ensure that tasks don't get duplicated, after every sync, I select and delete all the tasks in Outlook. (You can probably set your AP sync settings to avoid duplication. I just find deletion quicker and easier.)

Another thing is that I also, I use the GTD system, which relies on having my lists with me at all times. So, for me, the primary objective here was to get my lists out of AP and into my handheld, not the other way around. While you might be able to reverse engineer my methods to allow for two-way sync, I don't bother with doing that for a couple of reasons:

- I don't need it -- When AP is not readily available, I can now use my Toodledo (TD) list to mark any tasks complete, add notes, etc. I can get any revisions I've made back out of TD for my weekly review using the TD's Export Completed Task functions. This allows me to save the file, open it in Excel, and harvest any information I need for my weekly review (cut and paste functions work will with notes that need updating).
- It wouldn't save me any time -- AP is such a robust software (the best in the world IMHO ☺), any information that I would import from another program would be scant by comparison, leaving me a bunch of AP fields to fill in anyway. It's easier for me to just update my lists "by hand" during my weekly review.

There's lots of stuff on the AP forum about how to set your AP up to support GTD, and likewise in TD. So, I won't go into that stuff. I'll just show you my process.

In Achieve Planner

1. Sync to Outlook on my Netbook using the following synchronization settings in AP:

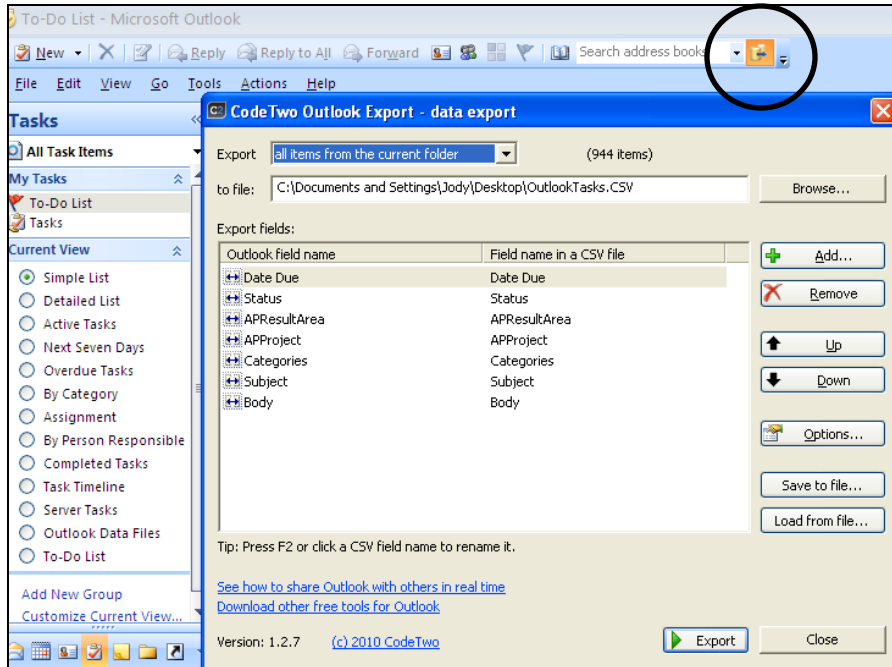
The screenshot shows the 'Outlook Synchronization Settings' dialog box. It has a blue title bar and a yellow background. The 'Email' section is expanded, showing options for 'Perform automatic sync every' (180 minutes), 'Show Tooltips' (checked), 'Import Email from the following folder(s)' (with a 'Browse...' button), 'Processed Email Folder' (with a 'Browse...' button), 'Import sender/receiver' (unchecked), 'Import Body' (unchecked), 'Length' (500), 'Import Hot Key' (Ctrl + Shift + Alt + Win + E), and a note: 'NOTE: Check at least one of Ctrl, Alt or Win to enable Hot Key'. The 'Appointments' section is also expanded, showing options for 'Import Appointments' (unchecked), 'Import Private' (unchecked), 'Import Changes' (unchecked), 'Sync reminders' (unchecked), 'Export Appointments' (unchecked), 'Export private' (unchecked), 'Export Project Appointments' (unchecked), 'Date' (None), 'Export Deletes' (unchecked), and 'Import Deletes' (unchecked). The 'Tasks' section is expanded, showing 'Import Tasks' (unchecked) and 'Export Tasks' (checked) with an 'Advanced Settings...' button. The 'Contacts' section is expanded, showing 'Import Contacts' (checked), 'Import Private' (checked), 'Import Changes' (checked), 'Export Contacts' (unchecked), 'Export Private' (unchecked), 'Export Deletes' (unchecked), 'Clear Deletion History' (button), 'Clear Sync History...' (button), and 'Confirm Outlook Deletes' (unchecked).

The screenshot shows the 'Outlook Task Sync Settings' dialog box, General tab. It has a blue title bar and a yellow background. The 'Outlook folder: (leave blank for default)' is empty, with a 'Browse...' button. The 'Import Outlook tasks into this top-level project:' is '<New Outlook Tasks>'. The 'Conflict Resolution:' is 'Manual'. The 'Sync Achieve Planner Task Notes Instead of Description' is checked. The 'Import Completed Outlook Tasks' is unchecked, and 'Sync Task Dates' is unchecked. The 'Encode Project Name In Task Subject:' is 'Don't Add'. The 'Encode Priority In Task Subject:' is 'Don't Add'. The 'Export Project/Task Notes' is checked, and 'Sync Task Reminders' is unchecked. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.

The screenshot shows the 'Outlook Task Sync Settings' dialog box, Export tab. It has a blue title bar and a yellow background. The 'Only export projects/tasks with this ancestor priority:' is 'All Priorities'. The 'Export projects' and 'Export tasks' are checked. The 'Export completed projects/tasks' is unchecked, and 'Only export leaf tasks' is unchecked. The 'Delete non-exported items from Outlook' is checked, and 'Export work-related items' is checked. The 'Include project name in categories' is unchecked, and 'Export personal items' is checked. The 'Flag projects with the following category:' is empty. The 'Flag parent items with this category:' is empty. The 'Export Achieve Planner custom fields' is checked, and 'Use leading 0's for priorities' is unchecked. The 'Delete AP tasks when previously synced task not found in Outlook' is unchecked. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.

In Outlook

2. View the To-Do List in Simple List View (may not matter what view you're in, but this view is set up for all the user-defined fields I need).
3. Export CSV to desktop using CodeTwo (the icon appears in the circle in the figure below).



4. Break CSV file into as many 500-task files as needed to get the entire list. TD won't import huge files. I've found that 500-task chunks go in with no problem. Since I have about 900 tasks on my full list (that's everything in my life), this step only takes a couple of minutes.

In Toodledo

5. Import each CSV file using the import/export CSV tools.
6. Map the fields:

Outlook Fields	Toodledo Fields
Due Date	Due Date
Status	Status
APResult Area	Folder
APProject	Tag
Categories	Context
Subject	Task
Body	Notes