

Microsoft 365: Supercharging CPA Productivity



Presented By

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Nationally recognized thought leader, advisor, author and speaker on CPA technology
- Strategic technology advisor to the profession w/ 35+ years of experience
- Founded and sold two CPA technology advisory startups
- Former National Mid-market Technology Partner - BDO
- CPA Practice advisor Top 25 Thought Leader for the CPA profession
- AICPA Business & Industry Hall of Fame Inductee
- Past Chair of the Michigan Association of CPAs
- Passionate advocate for the CPA profession!

Learning Goals



- Identify many ways that you can tap into the full potential of Microsoft 365.
- Identify a series of specific initiatives and apps that you can implement to optimize Your Microsoft 365 ROI.

Presentation Outline

- Microsoft 365 Value Proposition
- Top Apps and Initiatives to Focus On
- Getting Help
- Wrap-up

MICROSOFT 365 VALUE PROPOSITION FOR YOUR PRACTICE



Microsoft 365 Value Proposition is Compelling

Enhance Communication & Collaboration

Simplify tech stack

Enhance data security and disaster recovery protection

Enable a hybrid work environment

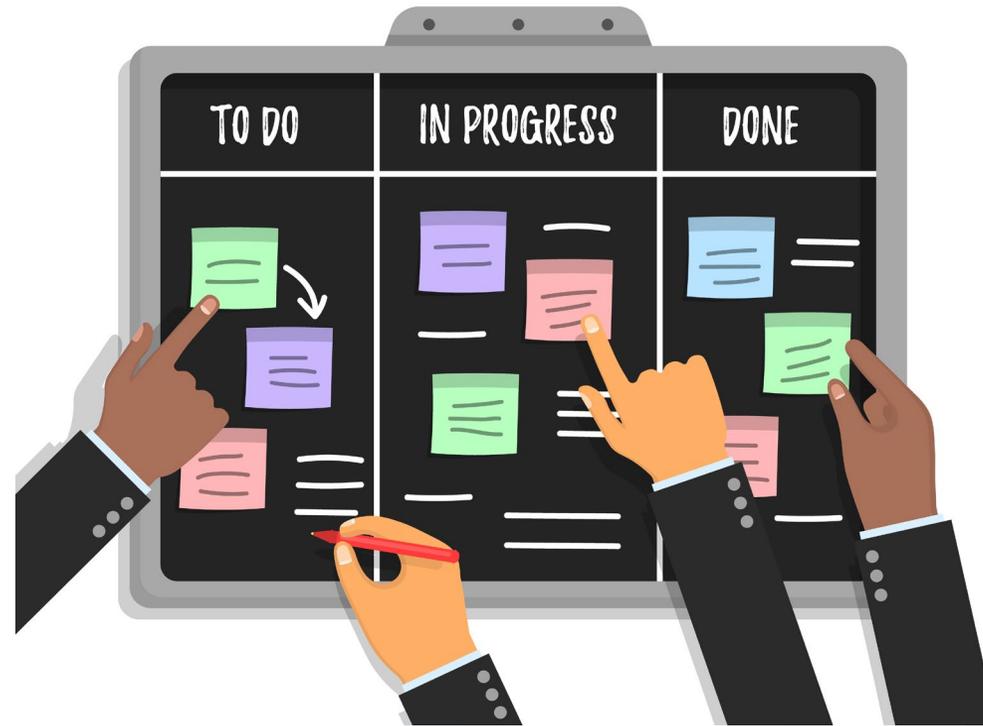
Future proof your business - create the foundation for using AI

Reduce costs & infinitely scalable

Microsoft 365 – What You Start With

 Add-Ins Add-Ins	 Bookings Simplify how you schedule and manage appointments both inside and outside your organization.	 Calendar Manage and share your schedule.	 Clipchamp Make and edit videos.	 Connections Access personalized tools, news, and resources.
 Engage Connect with coworkers and classmates, share information, and organize around projects.	 Excel Budget, plan, and calculate.	 Forms Customize surveys and quizzes, get real-time results.	 Insights Improve your productivity and wellbeing with Microsoft Viva Insights.	 Kaizala A simple and secure mobile chat app for work
 Learning Keep learning, keep growing with Viva Learning.	 Lists Allows users to create, share, and track data inside lists.	 Loop Enabling teams to think, plan, and create together.	 OneDrive Safely store files, photos, and more.	 OneNote Create a digital notebook.
 Outlook Email, schedule, and set tasks.	 People Group, share, and manage contacts.	 Planner Create plans, organize and assign tasks, share files, and get progress updates.	 Power Apps Build mobile and web apps with the data your organization already uses.	 Power Automate Sync files and more to simplify your work.
 Power Pages Unleash the power of Copilot to craft secure, low-code business websites with ease.	 PowerPoint Easily make presentations.	 Project Develop project plans, assign tasks, track progress, and manage budgets.	 SharePoint Share and manage content, knowledge, and applications to empower teamwork.	 Stream Share videos of classes, meetings, presentations, and training sessions.
 Sway Create interactive reports and presentations.	 Teams Meet, share, and chat.	 To Do List and manage your tasks.	 Visio Simplify and communicate complex information visually.	 Viva Explore Viva apps that improve the way you work
 Whiteboard Ideate and collaborate on a freeform canvas designed for pen, touch and keyboard.	 Word Write, share, and make real time edits.			

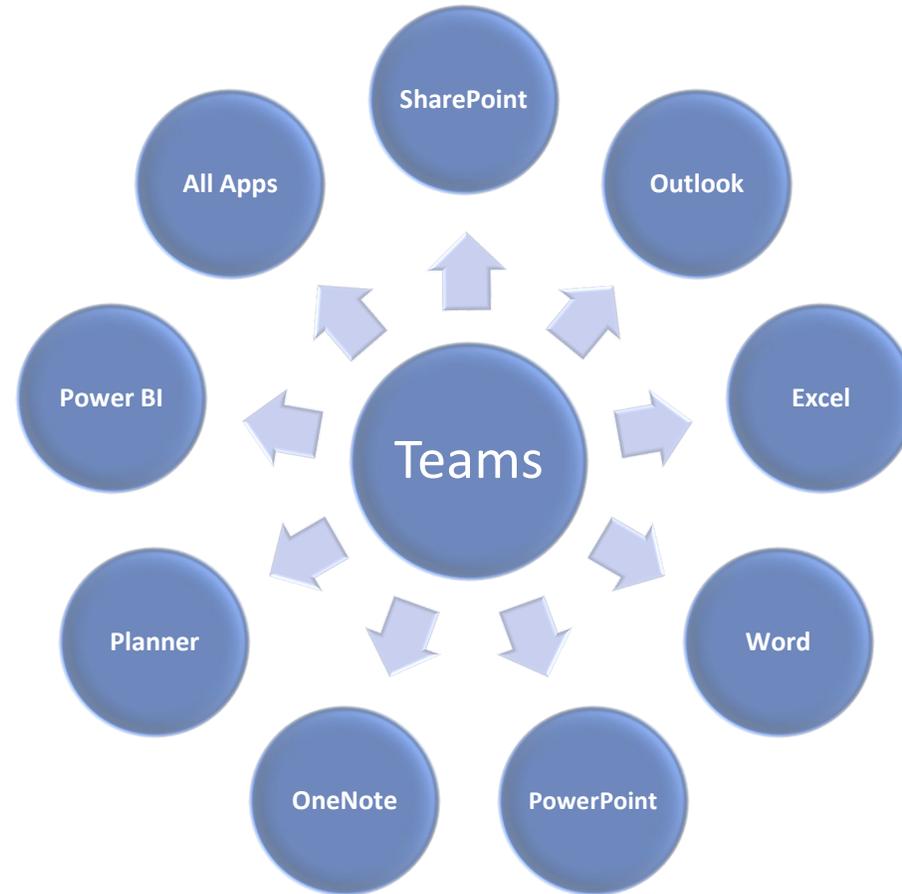
TOP MICROSOFT 365 INITIATIVES AND APPS TO FOCUS ON



Tips for Getting The Most Out of M365

- Make Teams the priority (including online meetings)
- Store shared files in SharePoint (including client file uploads)
- Manage engagements with Planner
- Get organized with OneNote
- Manage lists with Lists app
- Document processes with Clipchamp (formerly Stream)
- Create forms and surveys with Forms app
- Manage your schedule with the Bookings app
- Communicate financial data visually with Power BI
- Automate workflows with Power Automate & Copilot Studio

TEAMS ROLE IN THE MICROSOFT 365 ECOSYSTEM

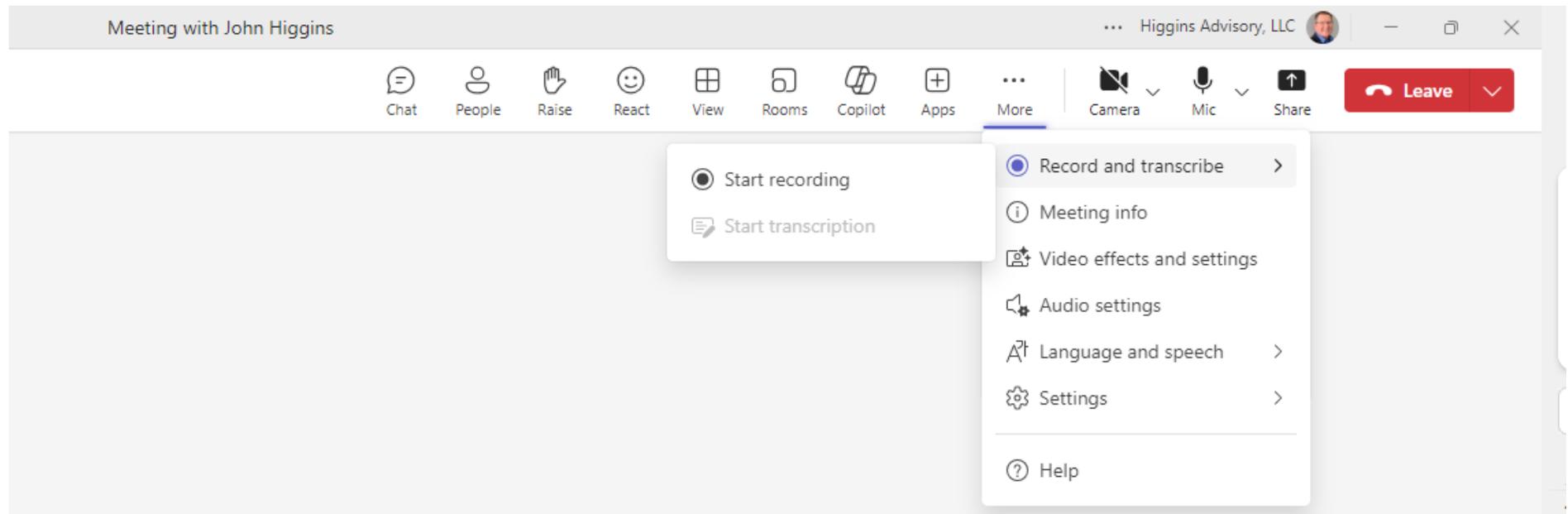
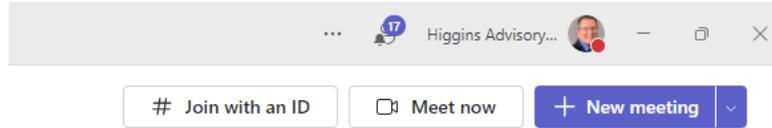


Communication - Make Teams the Priority

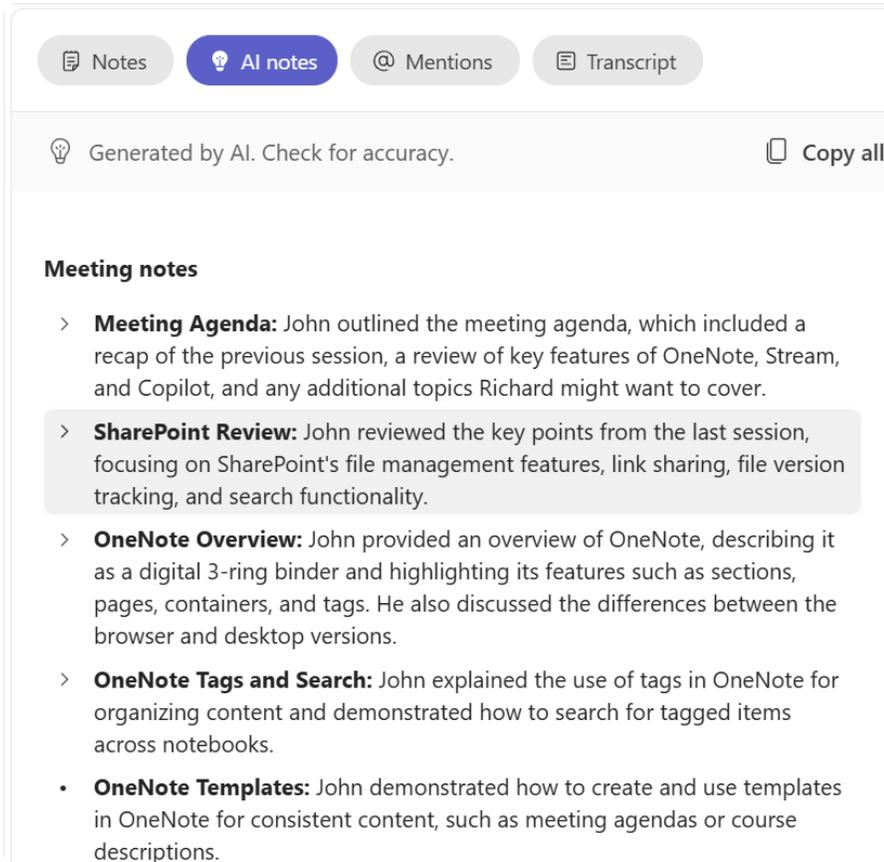


- ✓ Plan your Teams / Channels setup
- ✓ Use Chat within Team Channels
- ✓ Use Channel tabs for maximum efficiency
- ✓ Replace your phone system with Teams and Microsoft Voice
- ✓ Transfer email conversations to Teams
- ✓ Conduct and record all meetings in Teams

Document Meetings With Teams



Recap Teams Meetings Example



The screenshot shows a Teams meeting recap interface. At the top, there are four tabs: 'Notes', 'AI notes' (which is selected and highlighted in blue), 'Mentions', and 'Transcript'. Below the tabs, there is a light gray bar with a lightbulb icon and the text 'Generated by AI. Check for accuracy.' and a 'Copy all' button. The main content area is titled 'Meeting notes' and contains a list of bullet points:

- > **Meeting Agenda:** John outlined the meeting agenda, which included a recap of the previous session, a review of key features of OneNote, Stream, and Copilot, and any additional topics Richard might want to cover.
- > **SharePoint Review:** John reviewed the key points from the last session, focusing on SharePoint's file management features, link sharing, file version tracking, and search functionality.
- > **OneNote Overview:** John provided an overview of OneNote, describing it as a digital 3-ring binder and highlighting its features such as sections, pages, containers, and tags. He also discussed the differences between the browser and desktop versions.
- > **OneNote Tags and Search:** John explained the use of tags in OneNote for organizing content and demonstrated how to search for tagged items across notebooks.
- **OneNote Templates:** John demonstrated how to create and use templates in OneNote for consistent content, such as meeting agendas or course descriptions.

Follow-up tasks

- **Copilot Feature:** Post information in the Teams channel about the current status and functionality of the bookmark feature in Teams. (John)
- **Copilot Feature:** Check and confirm the availability of the bookmark feature in Teams and update the team accordingly. (John)
- **Copilot Access:** Ensure that the Copilot button is enabled for all team members in the Edge browser and provide necessary instructions for access. (Richard)
- **Copilot Training:** Offer training sessions or resources for team members interested in learning more about Copilot for Office 365 and its applications. (Richard)
- **Power BI Training:** Identify a team member to become the expert in Power BI and provide them with necessary training resources. (Lisa)

Recap Teams Meetings Example (continued)

Did we review the Planner app in the meeting

Copilot 3/22 1:28 PM

The Planner app was mentioned briefly in the context of tasks and to-do lists. It was noted that tasks assigned in the Planner app would show up in the To Do app, allowing for centralized task management across different 365 applications. However, there was no detailed review or demonstration of the Planner app itself. 1

AI-generated content may be incorrect

Does it seem like the attendees were understanding the concepts presented

Copilot 3/22 1:29 PM

Based on the meeting transcript, attendees engaged actively with the concepts presented, asking relevant questions and providing feedback. For example, Richard and Lisa discussed the possibility of flagging discussion threads in Teams, and Mary Rae MacKay shared a screenshot to assist with understanding a feature. Additionally, Richard offered to help anyone interested in learning more about Copilot for Office 365, indicating a proactive approach to understanding and utilizing the tools discussed. 1 2 3

AI-generated content may be incorrect

Did I discuss OneDrive security

Copilot 3/22 5:14 PM

Yes, OneDrive security was discussed briefly. John mentioned that OneDrive stores files that only the user has access to unless they share specific files or folders with others. This ensures privacy and control over the stored content. 1 2

AI-generated content may be incorrect

Ask me anything about this meeting

More prompts

Storing and Sharing Files



Store Shared Files in SharePoint & Personal Work Files in OneDrive

OneDrive = your personal (business) files

SharePoint = shared file sites

Share files internally & externally

Simultaneous Office file editing

Eliminate email file attachments

Synchronize with local PC

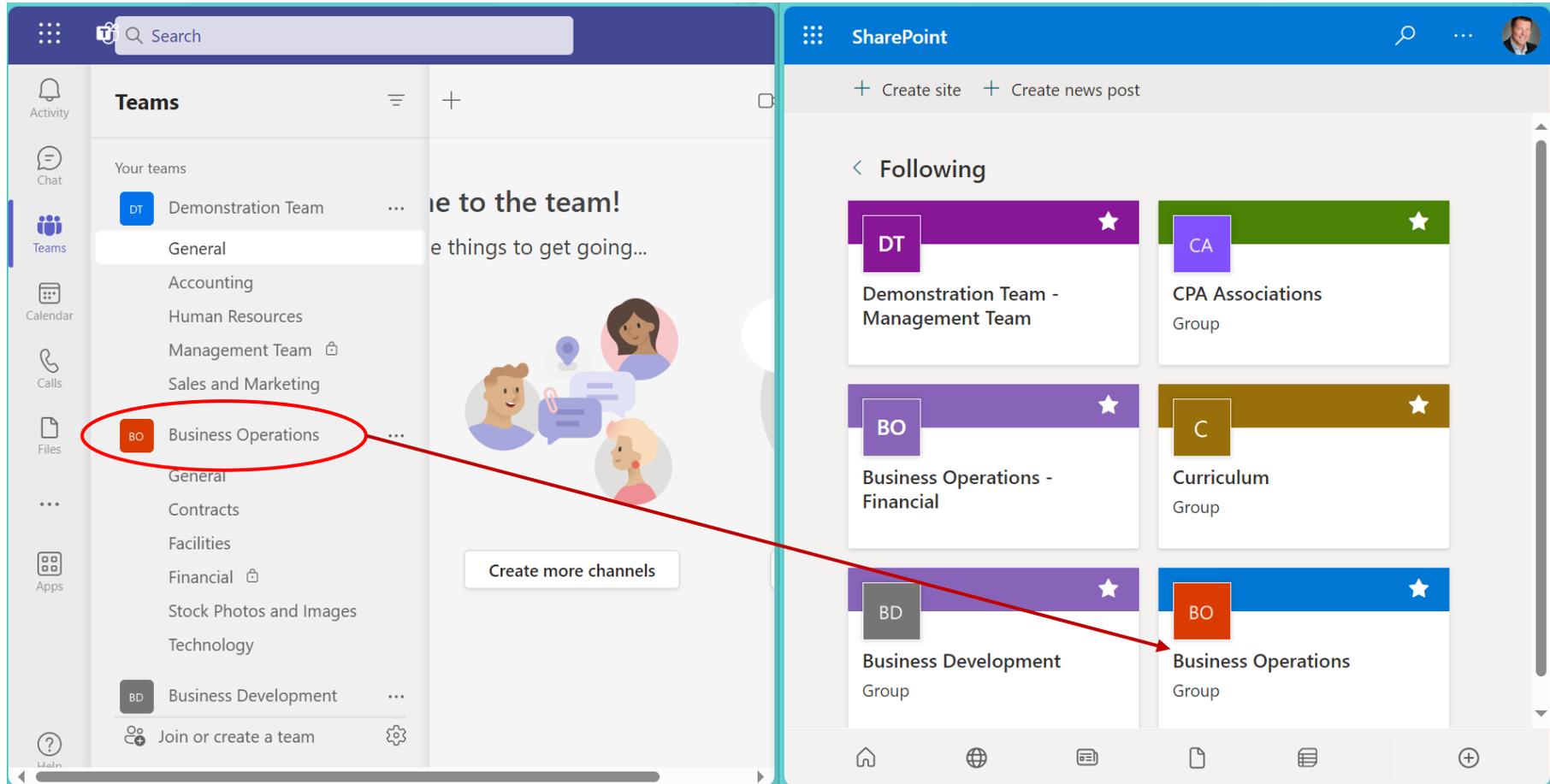
Maintain file version history

Set custom alerts

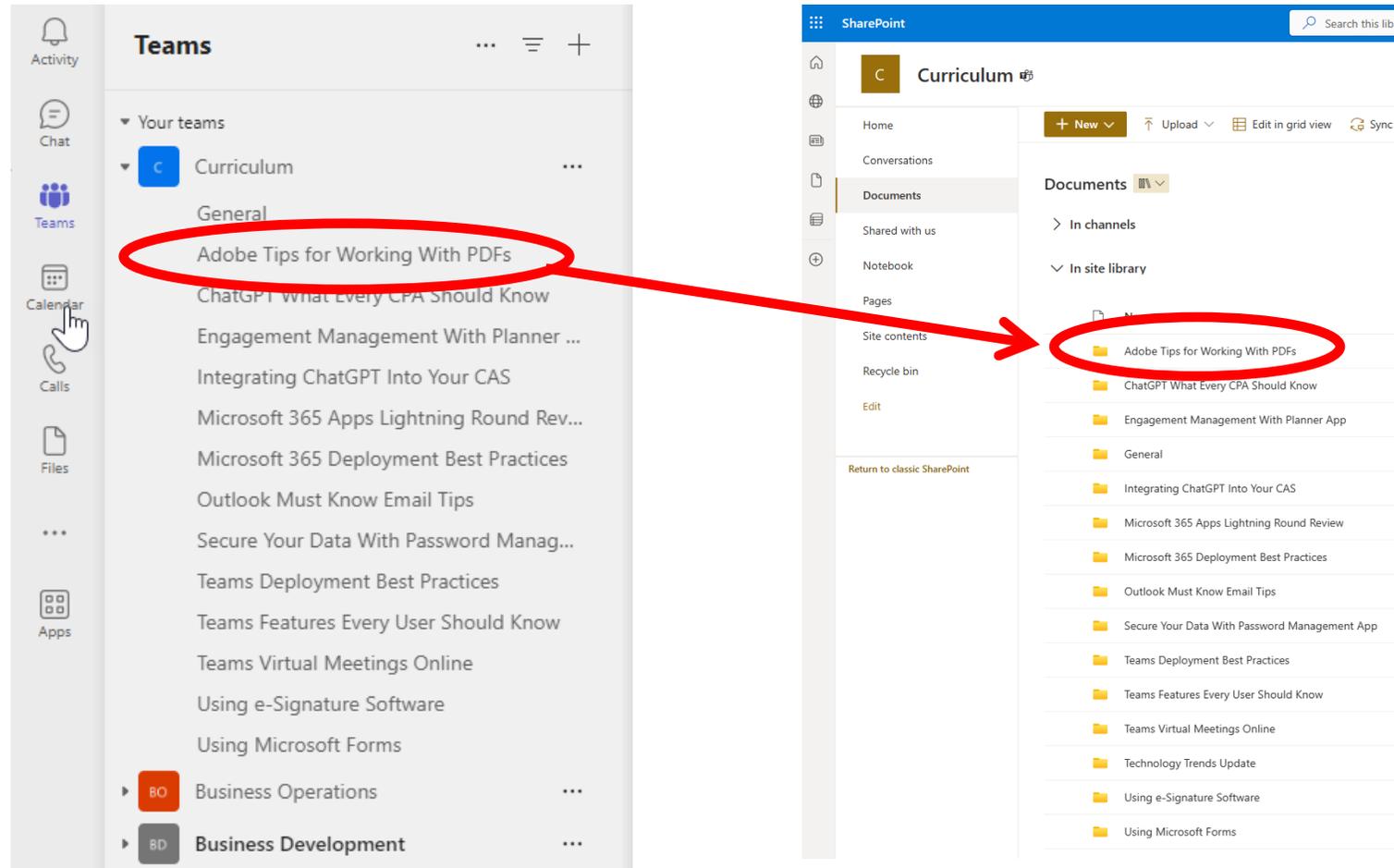
SharePoint Best Practices

- Manage SharePoint site creation and folder management through Teams
- Learn how file versioning works and manage appropriately
- Minimize the use of OneDrive
- Use Teams & SharePoint as a client portal for communication and file exchange
- Share files via email links, not attachments
- Automate routine file processing with Power Automate and Copilot

Teams / SharePoint Relationship



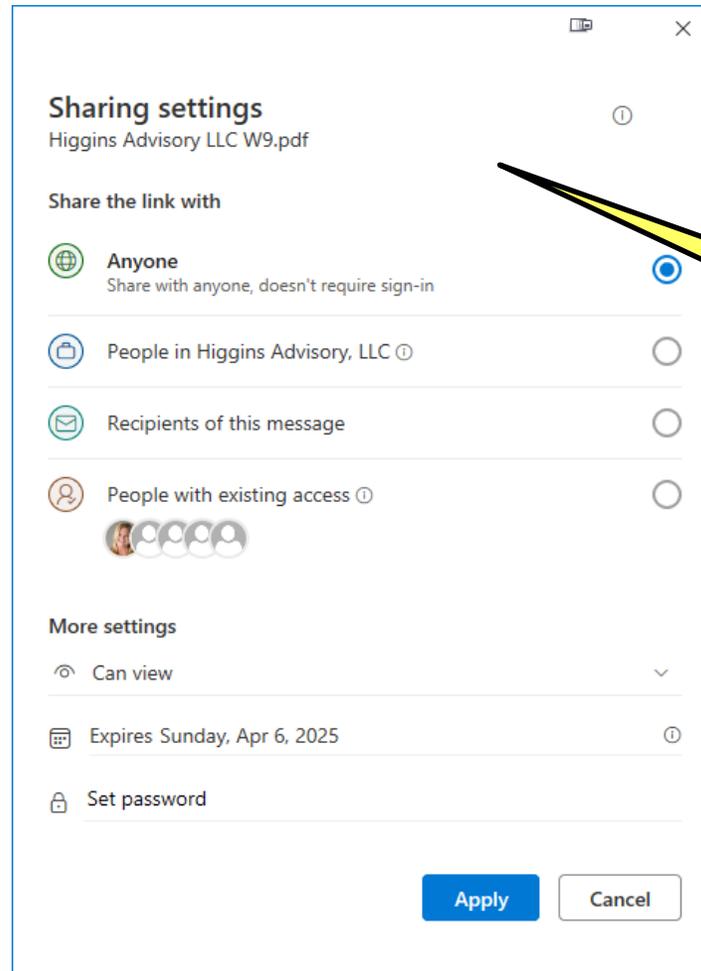
Teams Channels & SharePoint File Folders



Sending Files Securely: Use File Link

The screenshot shows the Microsoft Word interface for composing an email. The ribbon includes 'File', 'Message', 'Insert', 'Draw', 'Options', 'Format Text', 'Review', and 'Help'. The 'Attach File' group is active, showing options like 'Attach File', 'Link', 'Signature', 'Attach File via Link', 'Copilot', 'Loop Components', 'Assign Policy', and 'Dictate'. The 'Link' option is selected, opening a dialog box titled 'How do you want to attach this file?'. The dialog offers two choices: 'Share link' (highlighted) and 'Attach as copy'. The 'Share link' option includes the text 'Recipients can see the latest changes and respond in real time.' A yellow callout bubble points to the dialog with the text 'Requires file to be stored in OneDrive or SharePoint'. In the background, the email composition area shows the 'To' field with a link to 'Higgins Advisory LLC W9.pdf' and a sharing menu with options like 'Anyone with the link can view', 'Manage access', 'Open Link', and 'Copy Link'. The email body contains the text 'Regards, John' and a signature block for John Higgins, CPA.CITP, Strategic Technology Advisor, with contact information for Higgins Advisory, LLC.

Establish File Link Access Controls



Establish file sharing link permissions

Create a Secure Client Portal Using Teams

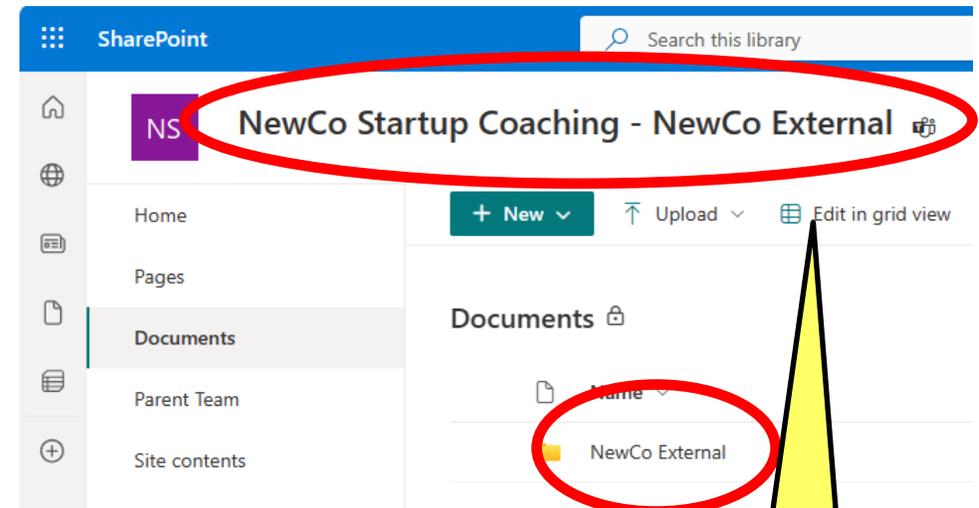
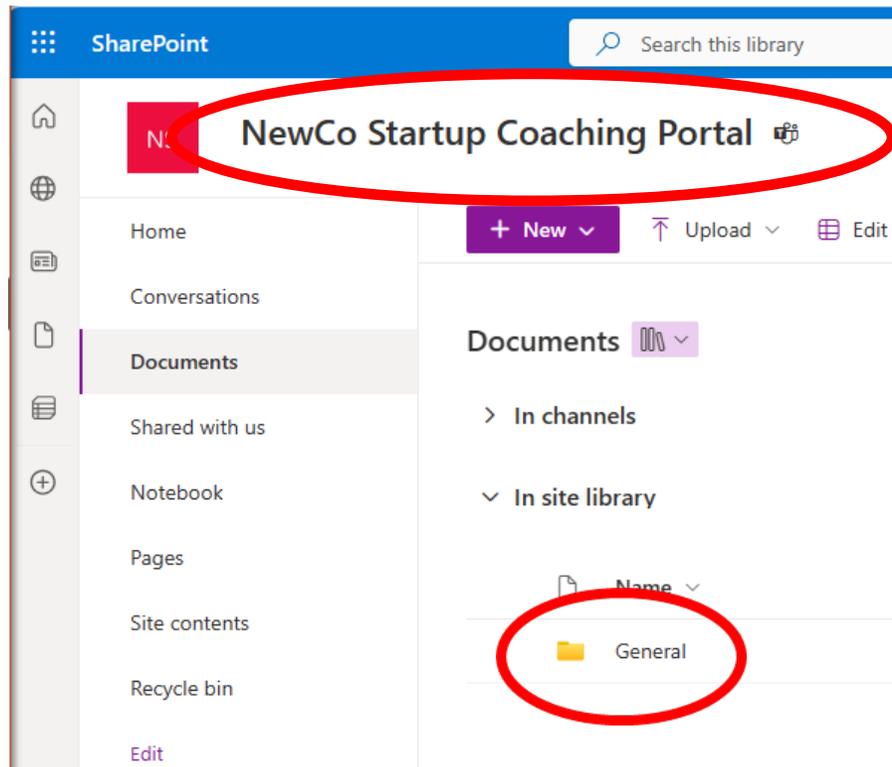


Establish Client Portal Model (continued)

Firm view

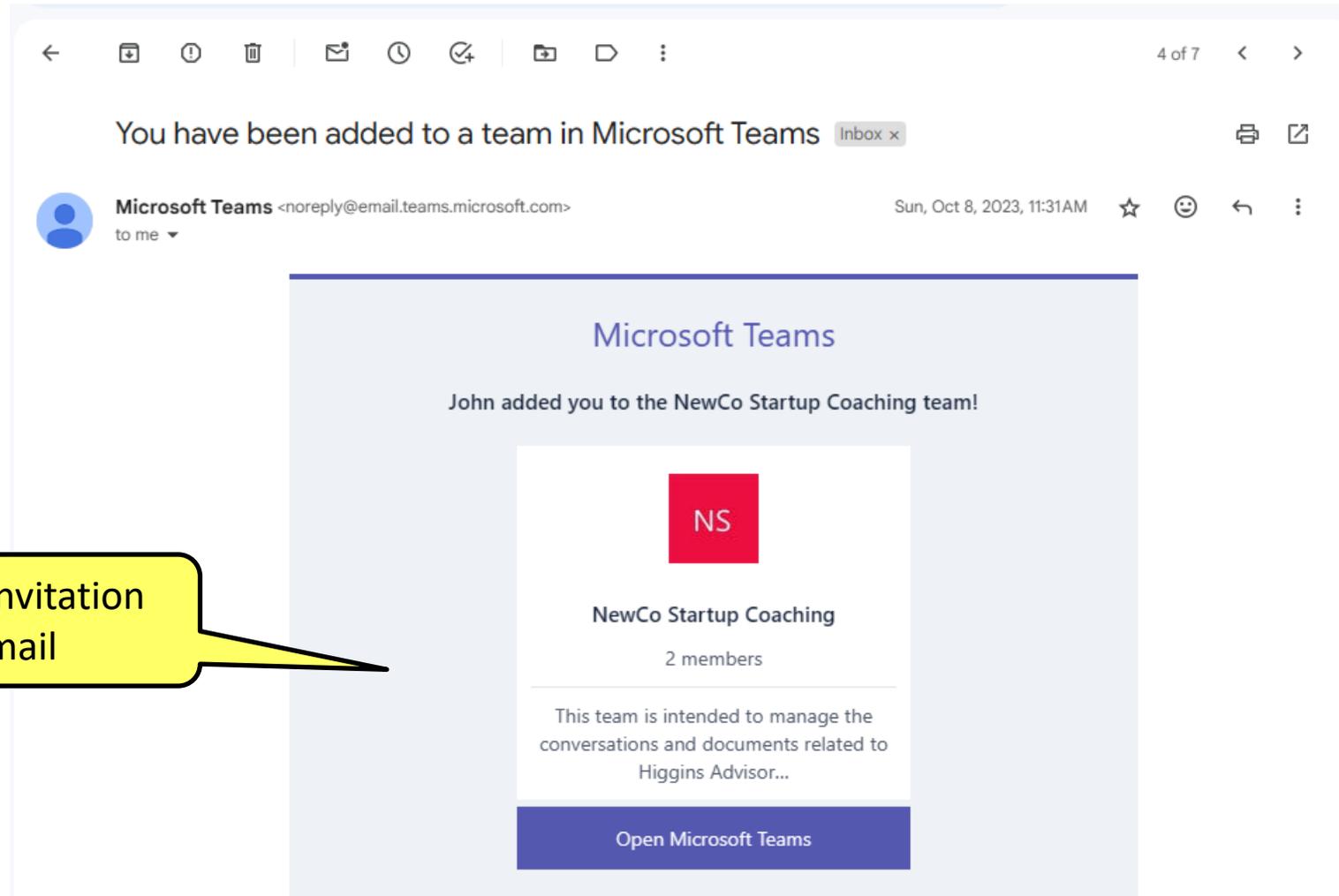
The screenshot shows a Microsoft Teams interface. On the left, the 'Teams' sidebar lists various teams, with 'NewCo Startup Coaching Portal' selected. The main area displays a channel named 'NewCo External'. The channel content includes a welcome message from John Higgins dated 10/8/2023 9:58 AM, a reply from Nicole Doe dated 10/8/2023 9:59 AM, and another message from John Higgins dated 10/8/2023 10:01 AM containing a meeting link. A notification card from 'Higgins Advisory, LLC' is also visible, stating 'You can now book and manage appointments using our booking page.' Below the meeting link, there is a 'Financial Analysis Sample' section with an attached Excel file named 'Financial Sample.xlsx'.

Establish Client Portal Model (continued)



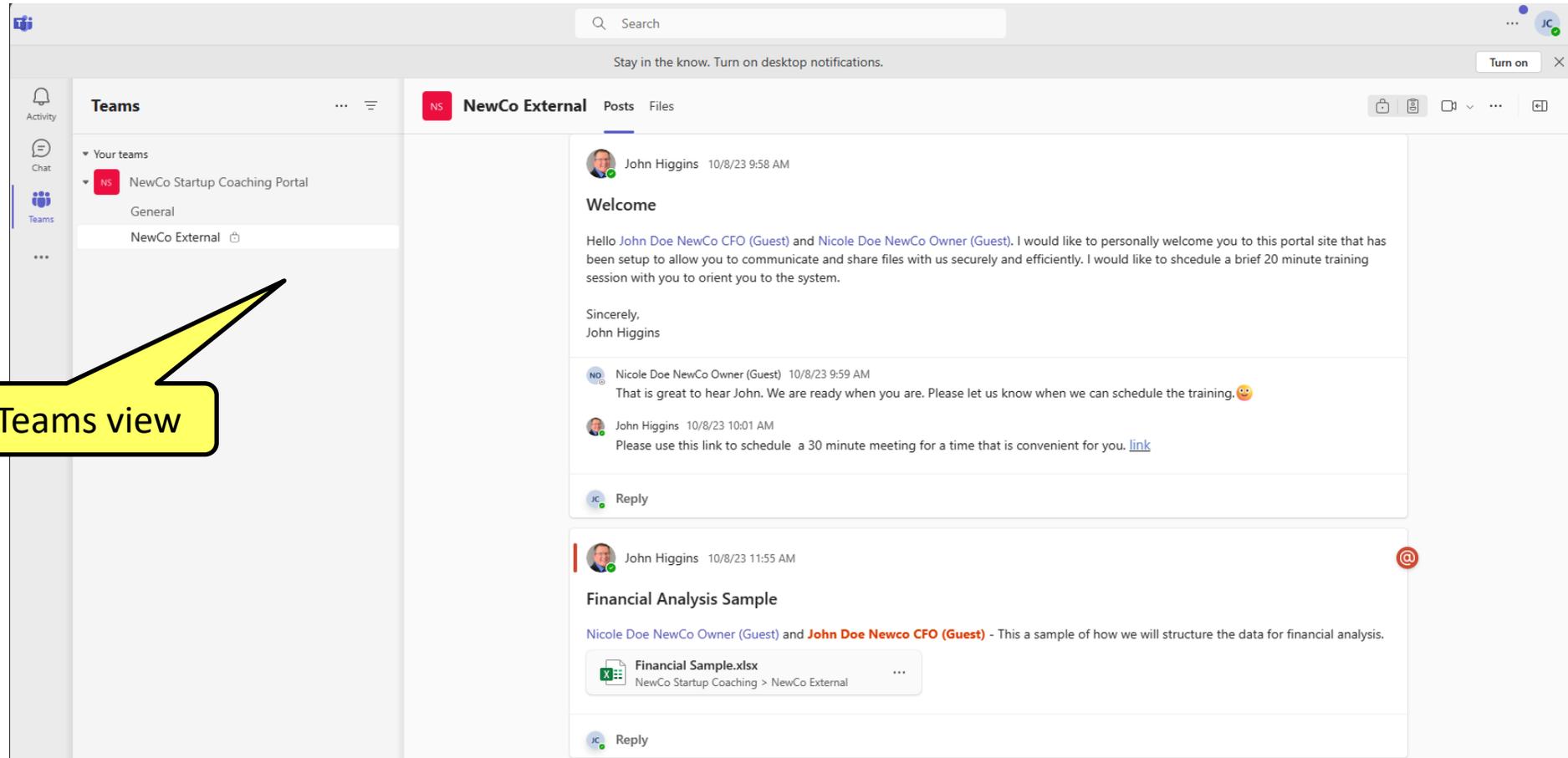
Private channel site

Establish Client Portal Model (continued)



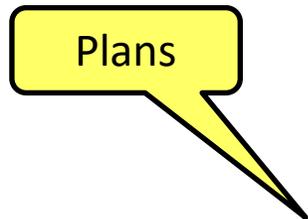
Client invitation email

Establish Client Portal Model (continued)



Client Teams view

Manage Engagements & Projects with Planner



Planner

My Plans > MS Teams Deployment

Grid Board Schedule Charts Timeline

My Day
My Tasks
My Plans
Pinned

Tax Engagement Demonstrat...
Courseware Development
MMO

+ New plan

Set up this planner

+ Add task

Project management

Project kickoff

You've read the introduction to this "Chat, teams, channels, and apps" plan. You've done all the preliminary tasks. Now you're ready to hold a kickoff meeting for your Teams rollout project. The project...

0 / 6

12/31/2024

Get ready

+ Add task

Adoption

Build your Teams adoption plan

A successful Teams rollout needs a well-thought-out adoption plan to help your users make the move to Teams and get the most out of it, right from the start. Use our adoption guidance to create a pla...

3 0 / 5

12/31/2024

Roll out to early adopters

+ Add task

Project management Adoption

Implement your adoption plan

You created an adoption plan under "Get ready." Now it's time to implement it. If you need further guidance, check out our "Adopt Teams" resources in the attachment below.

1 0 / 1

02/28

Configuration

Address deployment prerequisites

Before you roll out Teams across your organization, take time to confirm that your environment is ready for Teams. If you used "Get started" to get ready...

Project management Configuration

Roll out Teams to pilot users

To get started quickly on Teams, we recommend you create two or three team and channels for a select group of early adopters. By first rolling out Teams to a...

Task Card Details

Task Details

Task Detailed Description / Notes

Task Checklist Items

Task Description / Name

Assigned to

Task classification labels

- Copy task
- Move task
- Copy link to task
- Delete

File attachments / links

Comments / activity journal

MS Teams Deployment

Implement your adoption plan
Last changed 11/12/2023 by you

Assign

Project management Adoption

Bucket: Roll out to early adopters | Progress: Not started | Priority: Medium

Start date: Start anytime | Due date: 01/29/2024 | Repeat: Does not repeat

Notes: You created an adoption plan under "Get ready." Now it's time to implement it. If you need further guidance, check out our "Adopt Teams" resources in the attachment below.

Checklist 0 / 1

- Implement the adoption plan you created under Get ready
- Add an item

Attachments: 1. Adopt Microsoft Teams <https://docs.microsoft.com/Mi...>

Comments: Type your message here

ORIENTATION TO THE PLANNER APP



Planner App Home Screen

The screenshot shows the Planner app interface. On the left, a navigation pane includes 'My Day', 'My Tasks', and 'My Plans' (highlighted with a red circle and a yellow callout bubble labeled 'Plans'). Below these are 'Pinned' items: 'Tax Engagement Demonstrat...', 'Courseware Development', and 'MMO'. A '+ New plan' button is at the bottom of the pane. The main area displays 'My Plans > MS Teams Deployment' with view options: Grid, Board (selected), Schedule, Charts, and Timeline. It features three columns: 'Set up this planner', 'Get ready', and 'Roll out to early adopters'. Each column has an 'Add task' button and a task card. The 'Set up this planner' card is titled 'Project management' and 'Project kickoff', with a due date of 12/31/2024. The 'Get ready' card is titled 'Adoption' and 'Build your Teams adoption plan', with a due date of 12/31/2024. The 'Roll out to early adopters' card has two sections: 'Project management' and 'Adoption' for 'Implement your adoption plan' (due 02/28), and 'Project management' and 'Configuration' for 'Roll out Teams to pilot users'.

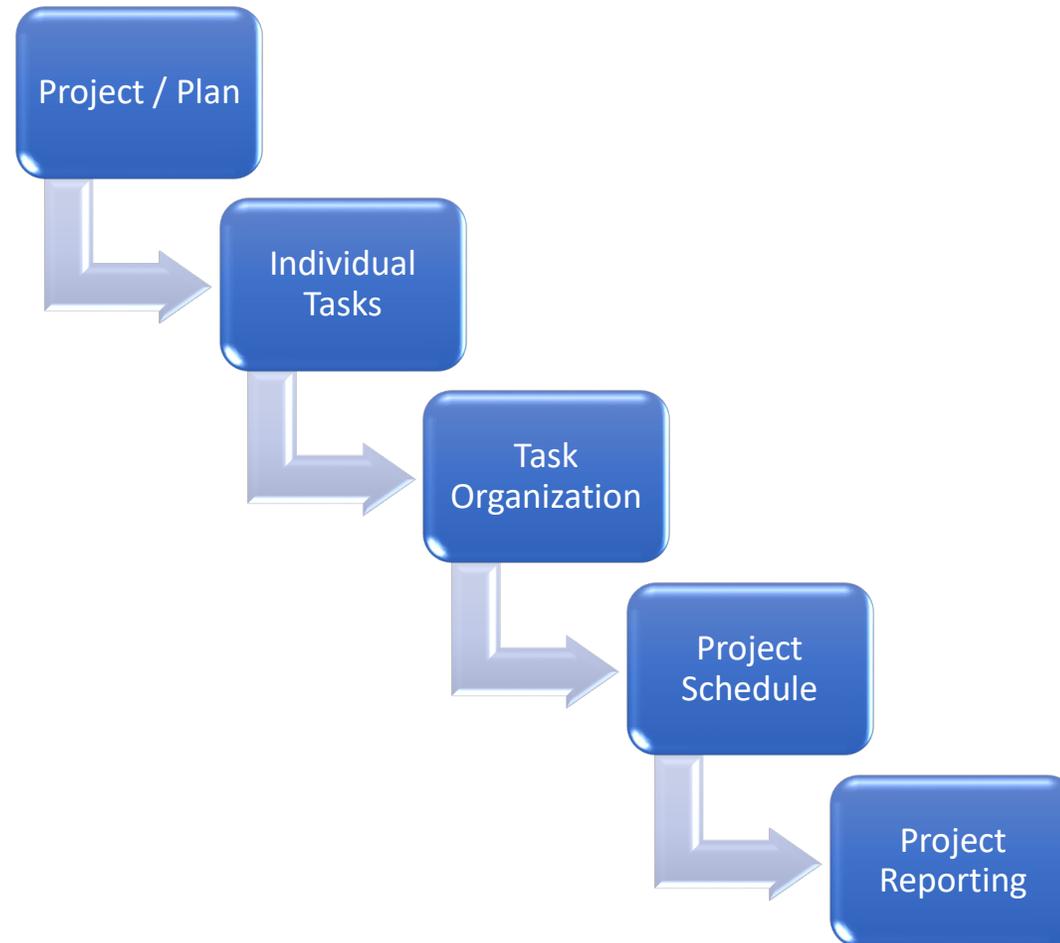
Project Plan Board View

The screenshot displays the Microsoft Planner interface in 'Board' view for a project named 'MS Teams Deployment'. The top navigation bar includes 'View Board', 'Grid', 'Schedule', 'Charts', and 'Timeline'. The 'Board' view is selected and circled in red. Below the navigation, there are search and filter options. The main area is divided into four columns representing different stages of the project:

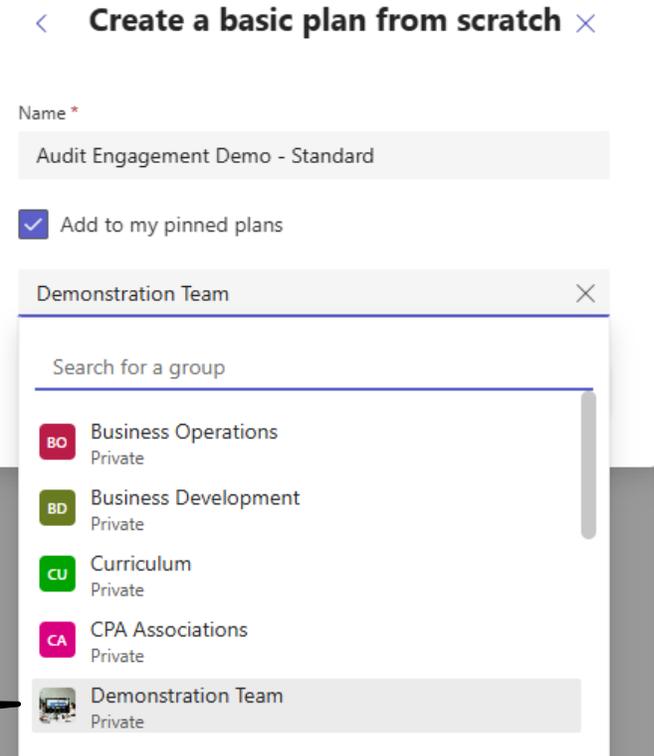
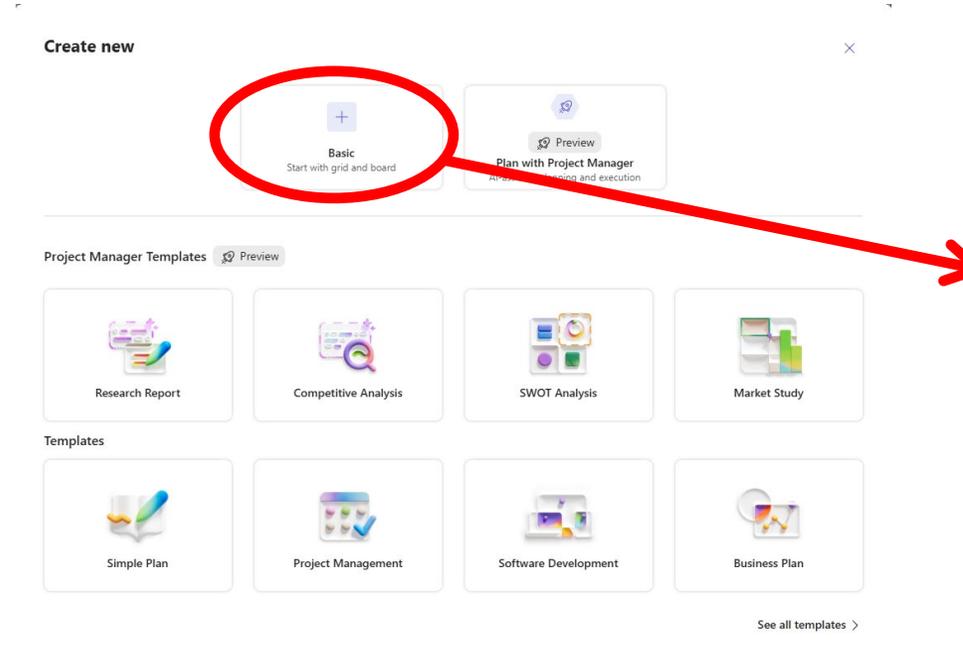
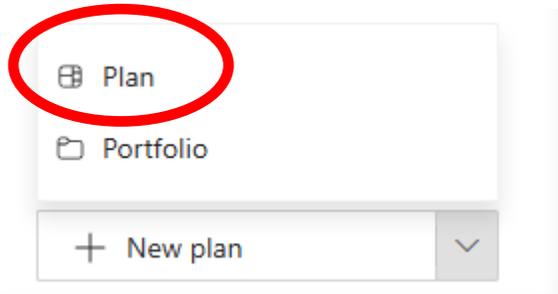
- Set up this planner:** Contains a task 'Project kickoff' under the 'Project management' category. Progress: 0/6. Due date: 12/31.
- Get ready:** Contains a task 'Build your Teams adoption plan' under the 'Adoption' category. Progress: 0/5. Due date: 12/31.
- Roll out to early adopters:** Contains a task 'Implement your adoption plan' under the 'Project management' and 'Adoption' categories. Progress: 0/1. Due date: 03/28.
- Org-wide rollout:** Contains a task 'Update your adoption plan' under the 'Adoption' category. Progress: 0/1. Due date: 03/11.

Annotations include a red circle around the 'Board' view selector, a red circle around the 'Roll out to early adopters' column header, and yellow callout boxes pointing to the 'Roll out to early adopters' column (labeled 'Organizing Buckets') and the 'Build your Teams adoption plan' task (labeled 'Individual Tasks').

DEEP DIVE FEATURES REVIEW



Creating A Plan



All team members will have access to the plan

Individual Task Card Details

Task Details

Task Detailed Description / Notes

Task Checklist Items

Task Description / Name

Assigned to

Task classification labels

Setup recurring tasks

File attachments / links

Comments / activity journal

The screenshot displays a task card for 'MS Teams Deployment' with the following details:

- Task Description / Name:** Implement your adoption plan (Last changed 11/12/2023 by you)
- Assigned to:** Assign
- Task classification labels:** Project management, Adoption
- Setup recurring tasks:** Bucket: Roll out to early adopters; Progress: Not started; Priority: Medium; Start date: Start anytime; Due date: 01/29/2024; Repeat: Does not repeat
- Task Detailed Description / Notes:** You created an adoption plan under "Get ready." Now it's time to implement it. If you need further guidance, check out our "Adopt Teams" resources in the attachment below.
- Task Checklist Items:** Checklist 0 / 1: Implement the adoption plan you created under Get ready; Add an item
- File attachments / links:** 1. Adopt Microsoft Teams (https://docs.microsoft.com/Mi...)
- Comments / activity journal:** Type your message here

Board View

The screenshot displays the Microsoft Planner interface in Board View for a plan titled "MS Teams Deployment". The interface includes a top navigation bar with "My Plans > MS Teams Deployment" and various view options (Grid, Board, Schedule, Charts). A search bar and "Share" button are also present. The main area is divided into five columns: "Set up this planner", "Get ready", "Roll out to early adopters", "Org-wide rollout", and "Add a new bucket". Each column contains a list of tasks with descriptions, progress indicators, and due dates. The tasks are categorized by tags such as "Project management", "Adoption", and "Configuration".

Column	Task	Category	Progress	Due Date
Set up this planner	Project kickoff	Project management	0 / 6	12/31
	Identify Teams champions and early adopters	Adoption	2 / 4	12/31
Get ready	Build your Teams adoption plan	Adoption	0 / 8	12/31
	Configure and validate Teams settings	Configuration	0 / 1	12/31
Roll out to early adopters	Implement your adoption plan	Project management, Adoption	0 / 1	03/28
	Roll out Teams to pilot users	Project management, Configuration	0 / 4	03/28
Org-wide rollout	Update your adoption plan as needed	Adoption	0 / 1	03/11
	Roll out chat, teams, channels, and apps to the next group of users	Adoption	0 / 1	03/18
Add a new bucket	Turn on Teams for pilot users	Configuration	0 / 1	03/28
	Turn on Teams	Adoption	0 / 1	03/18

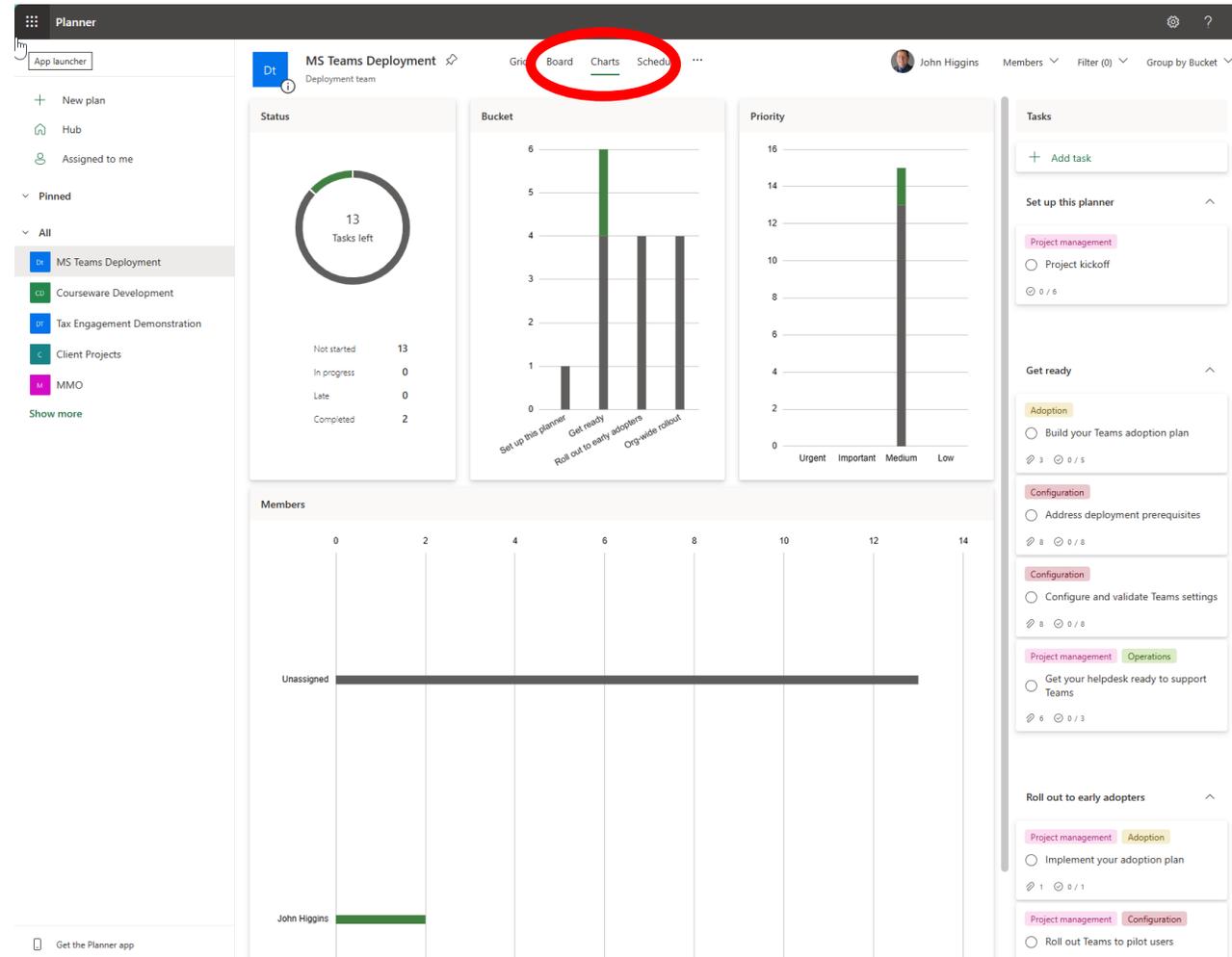
Grid View

Individual Tasks

Task Name	Assignment	Start date	Due date	Bucket	Progress	Priority	Labels	Quick look
Get your helpdesk ready to support Teams				Get ready	Not started	Medium	Operations +1	6 0/3
Configure and validate Teams settings			12/31/2025	Get ready	Not started	Medium	+1	8 0/8
Monitor usage and feedback			2/28/2025	Roll out to early a	Not started	Medium	Operations	1 0/3
Address deployment prerequisites			12/31/2025	Get ready	In progress	Medium	+1	8 0/8
Monitor Teams usage and feedback			4/24/2025	Org-wide rollout	In progress	Medium	Operations	1 0/2
Turn on Teams			3/25/2025	Org-wide rollout	Not started	Medium	Adoption	1 0/1
Build your Teams adoption plan	John Higgins		12/31/2025	Get ready	Not started	Medium	Adoption	3 2/4
Turn on Teams for pilot users			2/28/2025	Roll out to early a	Not started	Medium	+1	1 0/1
Roll out chat, teams, channels, and apps to the next gro			3/18/2025	Org-wide rollout	In progress	Medium	Adoption	1 0/1
Define usage scenarios	John Higgins		12/11/2024	Get ready	Completed	Medium	Adoption +1	1 3/6
Roll out Teams to pilot users			3/28/2025	Roll out to early a	Not started	Medium	+2	4 0/4
Learn about deploying Teams	John Higgins		11/20/2024	Get ready	Completed	Medium	+1	2 2/3
Project kickoff			12/31/2025	Set up this planne	Not started	Medium	+1	0/6
Implement your adoption plan			3/28/2025	Roll out to early a	Not started	Medium	Adoption +1	1 0/1
Update your adoption plan as needed				Org-wide rollout	Not started	Medium	Adoption	7 0/1
Identify Teams champions and early adopters				Get ready	Not started	Medium	Add label	

Organizing Buckets

Reporting – Chart View



Reporting – Schedule View

The screenshot displays the Microsoft Planner interface for a project named "MS Teams Deployment". The "Schedule" view is selected, showing a monthly calendar for January 2024. Tasks are represented as colored blocks on the calendar grid. A red circle highlights the "Schedule" tab in the top navigation bar. On the right side, the "Unscheduled tasks" panel is visible, containing a list of tasks such as "Set up this planner", "Get ready", and "Get your helpdesk ready to support Teams". A yellow callout bubble with the text "Unscheduled Tasks" points to this panel.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3	4	5	6
7	8 Project kickoff	9	10	11	12	13
14	15 Build your Teams a...	16	17	18	19	20
21	22 Address deployme...	23 Configure and vali...	24	25	26	27
28	29 Implement your ad...	30	31	1	2	3

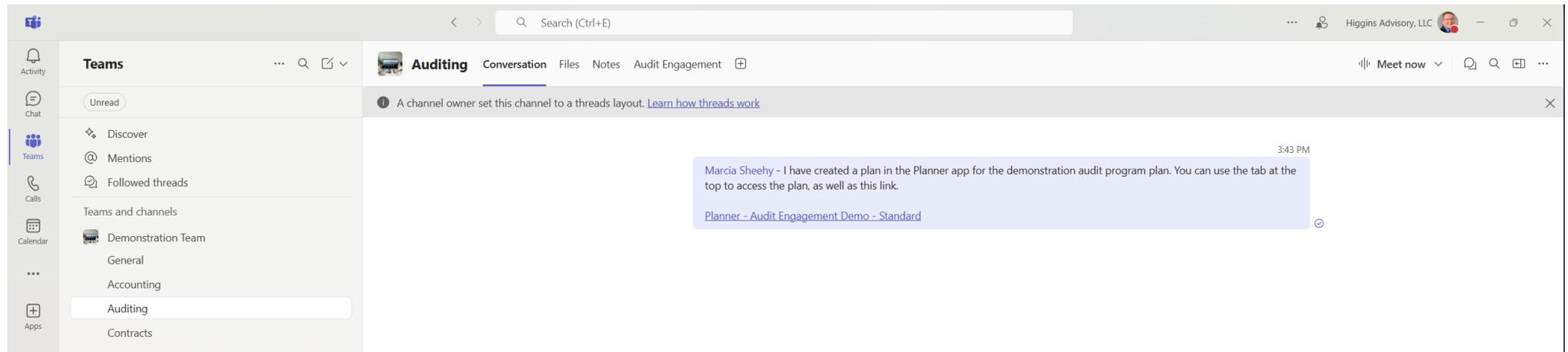
Reporting – View Options

The screenshot displays the MS Teams Deployment reporting dashboard. The top navigation bar includes 'Grid', 'Board', 'Charts', and 'Schedule'. The main content area is divided into three columns: 'Not started', 'In progress', and 'Completed'. The 'Completed' column shows a task card for 'Learn about deploying Teams' with a 'Get ready' section. A red circle highlights the 'Filter (0)' dropdown in the top right corner. A yellow callout box labeled 'Task filtering options' points to the 'Filter' dropdown menu, which lists various filtering criteria such as 'Due (0)', 'Late', 'Today', 'Tomorrow', 'This week', 'Next week', 'Future', 'No date', 'Priority (0)', 'Progress (0)', 'Label (0)', 'Bucket (0)', and 'Assignment (0)'. Another yellow callout box labeled 'Task grouping options' points to the 'Group by Progress' dropdown menu, which lists grouping options like 'Bucket', 'Assigned to', 'Progress', 'Due date', 'Labels', and 'Priority'.

Additional Plan Features

- Plan details
- Copy link to plan
- Export plan to Excel
- Copy Plan
- Add plan to Outlook calendar

Planner / Teams Integration



Planner / OneNote Integration

The screenshot shows the OneNote application interface. The ribbon at the top includes tabs for File, Home, Insert, Draw, History, Review, View, and Help. The 'Insert' tab is active, showing various options like Table, File, Spreadsheet, Screen Clipping, Pictures, Online Video, Link, Loop Components, Transcribe, Record Video, Date, Time, Date & Time, Page Templates, Equation, Symbol, Stickers, and Math Assistant. Below the ribbon, the 'Demonstration Team Notebook' is open, and the 'Auditing' tab is highlighted with a red circle. The main content area shows the title 'Audit Program Excel Template' and a link 'Demo Audit Plan in Planner App'. Below that, there is a document icon and the text 'sample audit program for performance measures'. At the bottom, an Excel spreadsheet is embedded with the following content:

Audit Program: Accuracy of Performance Measures			
	WPreference	preparedby	reviewedby
Audit Objective			
To determine whether the agency's reported performance measures are accurate, supported, and consistent with underlying source data, definitions, and applicable laws, rules, and guidance.			

Planner / Copilot AI Integration

The screenshot displays the Microsoft Planner interface. At the top, the navigation bar includes 'My plans > Audit Engagement Demo - AI Generated', 'Preview', 'Goals', 'Grid', 'Board' (selected), 'Reports', 'Charts', 'Whiteboard', 'SharePoint', 'Copilot' (circled in red), and 'Share'. Below the navigation bar, a banner reads 'Project Manager is an AI agent that can help you plan and execute your projects. Learn more'. A search bar labeled 'Filter by keyword' is present. The main area shows task status filters: 'All incomplete tasks', 'Assign to Project Manager' (with a purple AI icon), 'Needs your input', and 'Ready for review'. A task list on the left includes 'Enter a task name', 'Set bucket', 'Finish', and 'Assign to'.

Planner App Licensing Plans

	Formerly Project Plan 1	Formerly Project Plan 3	Formerly Project Plan 5
Microsoft Planner Included in Microsoft 365 Sign in to Planner See Microsoft 365 plans >	Planner Plan 1 \$10.00 user/month, paid yearly (Annual subscription auto-renews) ² Buy now Or try free for one month > Trial cancellation terms apply ¹	Planner and Project Plan 3 \$30.00 user/month, paid yearly (Annual subscription auto-renews) ² Buy now Or try free for one month > Trial cancellation terms apply ¹	Planner and Project Plan 5 \$55.00 user/month, paid yearly (Annual subscription auto-renews) ² Buy now Try now with a partner >
Planner in Microsoft 365 includes: <ul style="list-style-type: none">✓ Real-time collaboration, commenting, and sharing using the Planner app in Microsoft Teams or the Planner web app✓ Creation and management of content-rich tasks with features including files, checklists, and labels✓ Tasks organized by My Day, My Tasks, and Assigned to me✓ Basic plan templates✓ Ability to view reports and dashboards²✓ Grid, Board, Schedule, and Charts views✓ Ability to view task dependencies✓ Security, compliance, data privacy, accessibility, and Microsoft 365 customer support	Planner Plan 1 includes: <ul style="list-style-type: none">✓ Creation and management of content-rich tasks with features including files, checklists, and labels✓ Project goals✓ Backlogs and sprints✓ Premium plan templates✓ Ability to build reports and dashboards²✓ Grid, Board, Timeline (Gantt), and Charts views✓ Task dependencies✓ Customization and integration✓ Security, compliance, data privacy, accessibility, and Microsoft 365 customer support	Includes everything in Planner Plan 1, plus: <ul style="list-style-type: none">✓ Microsoft 365 Copilot in Planner (preview)³✓ Task history✓ Roadmaps✓ Baselines and critical path✓ Resources request capabilities✓ Program management✓ Portfolios in Planner✓ Project financials, budgeting, and costing✓ Advanced dependencies with lead and lag✓ Project Online desktop client✓ Project Online	Includes everything in Planner and Project Plan 3, plus: <ul style="list-style-type: none">✓ Advanced portfolio management✓ Enterprise resource management and allocation 

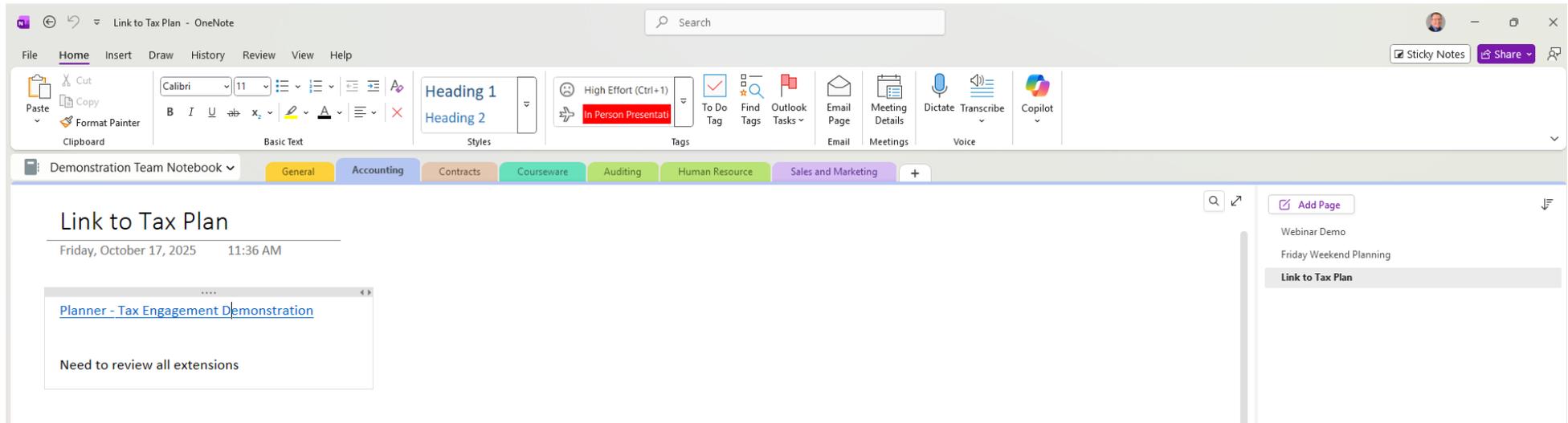
ORGANIZING NOTES AND IDEAS WITH ONENOTE



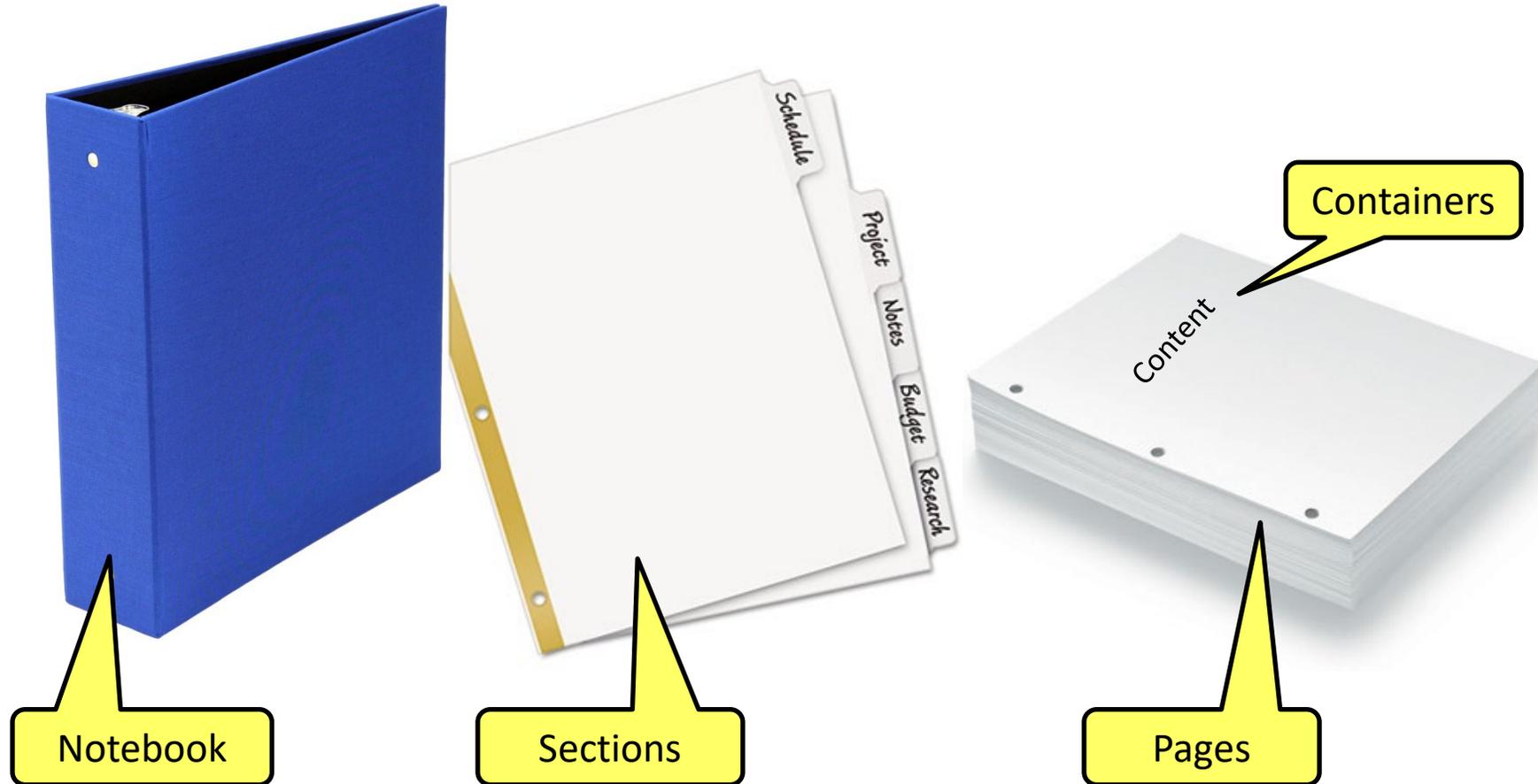
Applications for OneNote

- Document and organize notes
- Create and standardized meeting agendas
- Document and share meeting notes
- Maintain working documents
- Replace internal use of Microsoft Word
- ***Replace you paper notepad!***

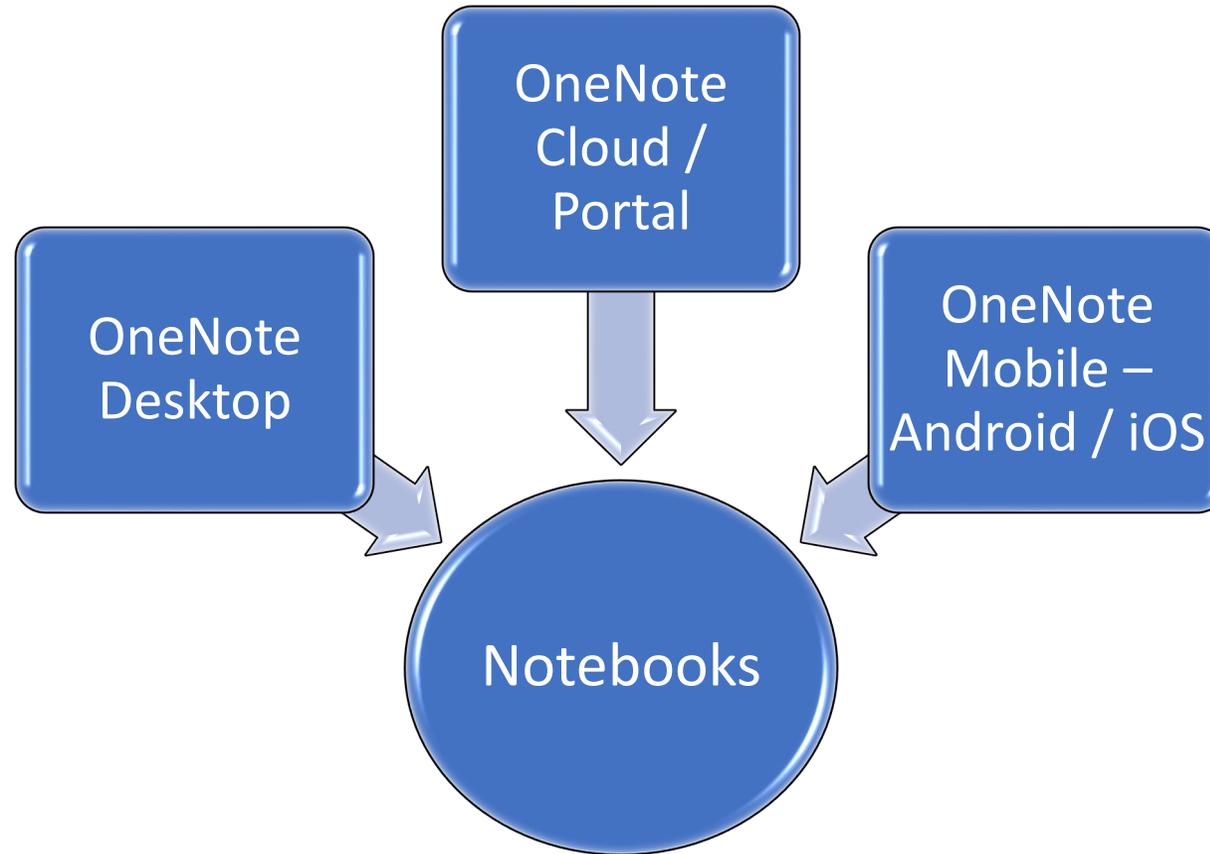
OneNote Home Screen



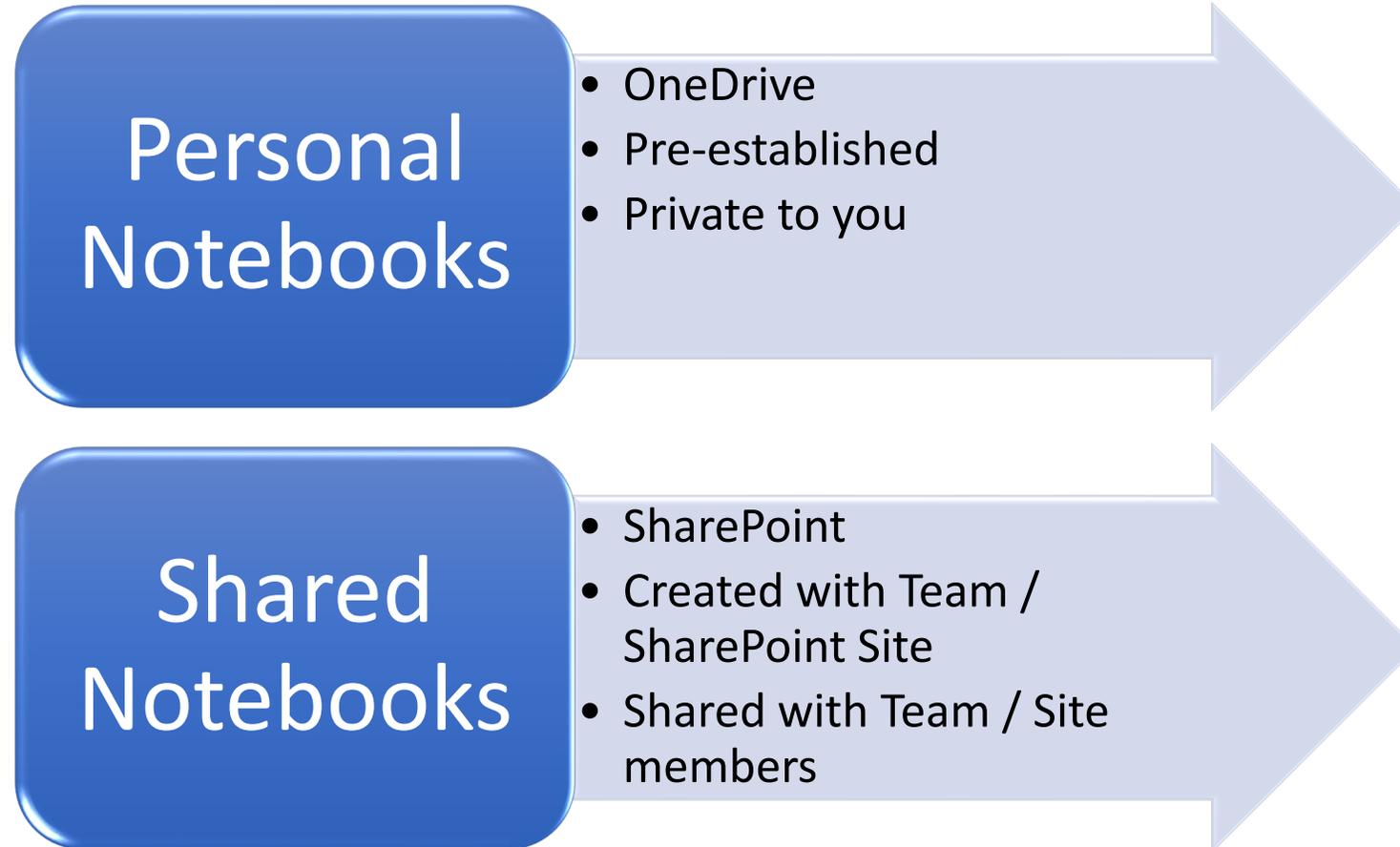
OneNote Content Organization



The OneNote Apps



OneNote Notebook Storage





OneNote App Things to Know

Supports multiple content formats

- Text / audio / video / files / drawing / links

Dictate option

One to one Teams / SharePoint / Notebook relationship

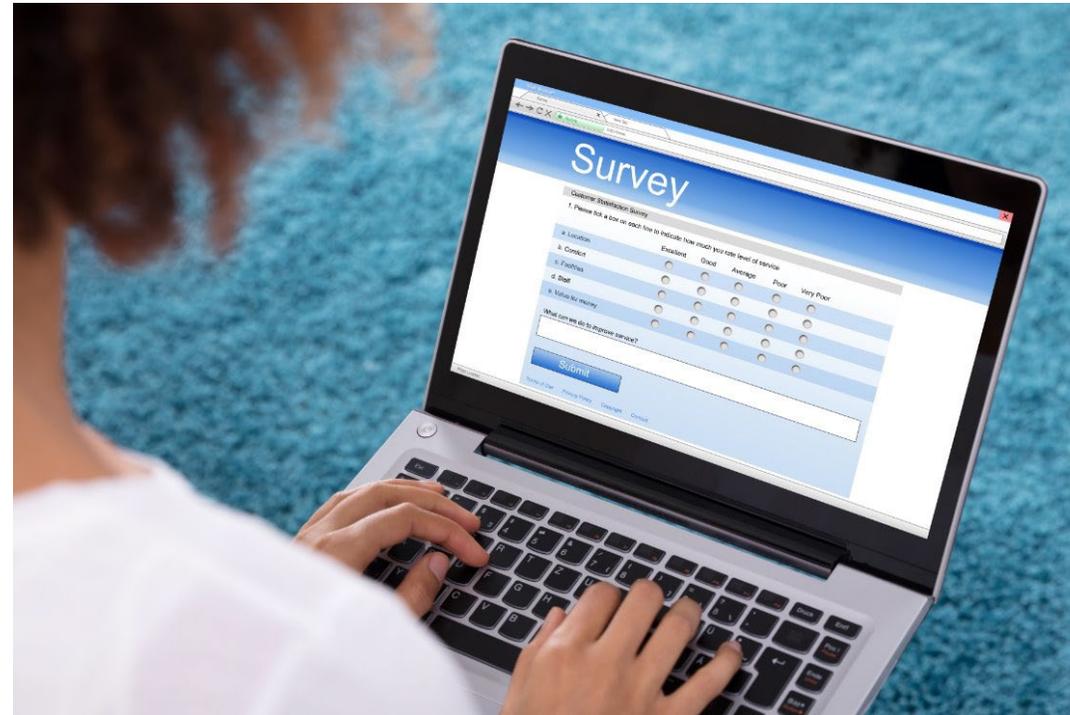
Shared access to notebooks

Custom note page templates

OneNote Features Review

- ✓ Navigating OneNote
- ✓ Creating and sharing notebooks
- ✓ Adding content to OneNote
- ✓ Tagging and searching content
- ✓ Using templates

CREATING SURVEYS AND FORMS FOR DATA COLLECTION



Applications for the Forms App

- Training / meeting evaluations
- Performance appraisals
- Customer / client satisfaction surveys
- 1040 Tax client organizer
- Skills assessment quizzes (internal / client)

Things to Know About the Forms App

Create surveys & quizzes

Not designed to create a fillable form

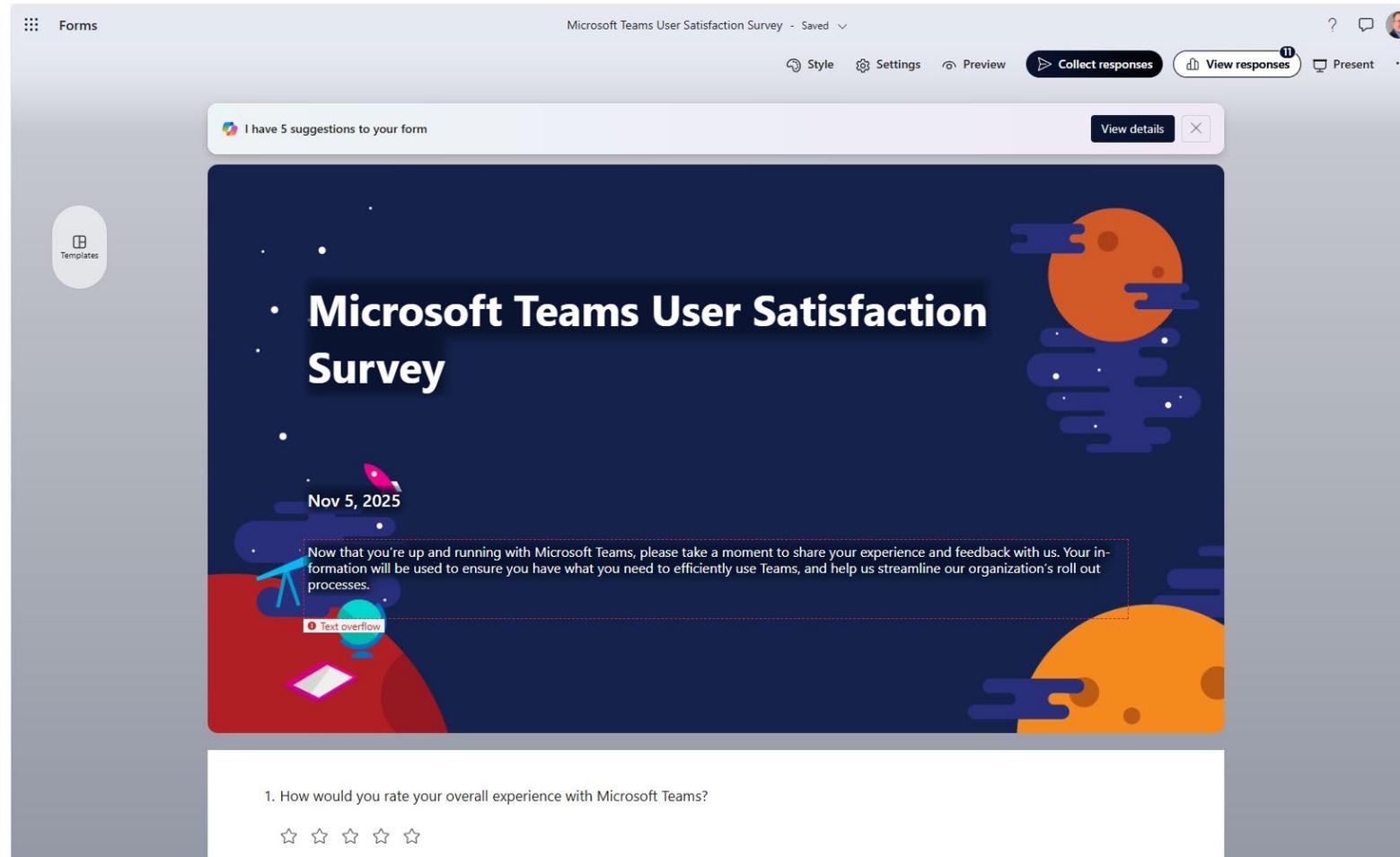
Simple and intuitive interface

“Responsive” display formatting

Pre-formatted response analysis

Direct integration with Excel for analysis

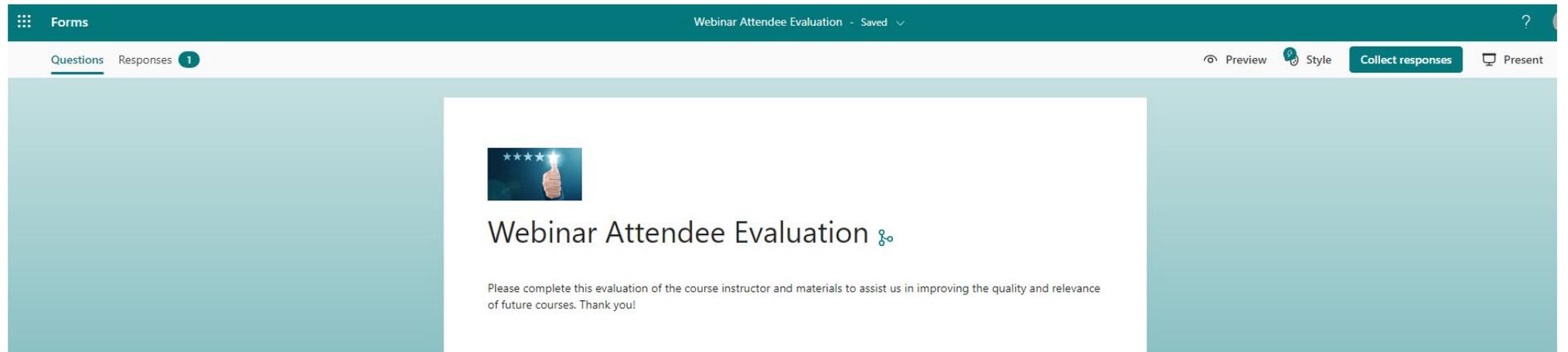
Forms App User Interface



Forms App Features to Review

- Creating a survey
- Survey question types
- Collecting and analyzing responses
- Leveraging Copilot AI in Forms app

Create Title and Introduction



The screenshot shows a form editor interface. At the top, there is a teal header bar with the text 'Forms' on the left and 'Webinar Attendee Evaluation - Saved' on the right. Below the header, there is a navigation bar with 'Questions' and 'Responses 1'. On the right side of the navigation bar, there are buttons for 'Preview', 'Style', 'Collect responses', and 'Present'. The main content area is a white box with a teal background. It features a small image of a hand pointing up with four stars above it. The title 'Webinar Attendee Evaluation' is displayed in a large font, followed by a small icon. Below the title, there is a paragraph of text: 'Please complete this evaluation of the course instructor and materials to assist us in improving the quality and relevance of future courses. Thank you!'.

Create Sections, Questions & Branches

Part 1 - Attendee information

Please complete the attendee information below

1. Full name

Enter your answer

Long answer Required

2. Email

Enter your answer

- Choice
- Text
- Rating
- Date
- Ranking
- Likert ⓘ
- Upload File
- Net Promoter Score®
- Section

Subtitle

Restrictions

Add branching

Add Branching If Applicable

18. Would you like to receive printed promotional information from us?

Yes Go to ▼

No Go to ▼

Go to ▼

Section

Next

✓ End of the form

Other sections

1. Part 1 - Attendee information

3. Contact Information

Go to

“Text” Question Type

The screenshot shows a question editor interface. At the top right, there are icons for copy, delete, down arrow, and up arrow. The question text is "2. Question" with a small icon to its right. Below the question is a text input field with the placeholder "Enter your answer". At the bottom of the question editor, there are two toggle switches: "Long answer" (which is currently off) and "Required" (which is currently on). To the right of these toggles is a three-dot menu icon. A dropdown menu is open from this icon, showing three options: "Subtitle", "Restrictions", and "Add branching". Below the question editor, there is a teal button with a plus sign and the text "Insert new", and a circular icon with a lightning bolt.

“Date” Question Type

The screenshot displays a configuration interface for a 'Date' question type. At the top right, there are icons for mobile view, delete, down arrow, and up arrow. The main area contains a question ID '2.' followed by a text input field labeled 'Question' with a copy icon. Below this is a date input field with the placeholder text 'Please input date (M/d/yyyy)' and a calendar icon. At the bottom right, there is a 'Required' toggle switch which is currently turned off, and a three-dot menu. The menu is open, showing two options: 'Subtitle' and 'Add branching'. Below the main configuration area, there is a teal button labeled '+ Insert new' and a circular icon with a lightning bolt.

“Choice” Question Type

The screenshot shows a quiz editor interface for a 'Choice' question type. At the top right, there are icons for copy, delete, down arrow, and up arrow. The question text is '2. Question' in a text box. Below it are two radio button options: 'Option 1' and 'Option 2', each with a small icon to its right. Below the options are two links: '+ Add option' and 'Add "Other" option'. At the bottom right of the question editor, there are two toggle switches: 'Multiple answers' (which is currently off) and 'Required' (which is currently on). To the right of these toggles is a three-dot menu icon. A dropdown menu is open from this icon, showing four options: 'Shuffle options', 'Drop-down', 'Subtitle', and 'Add branching'. At the bottom left of the editor, there is a teal button labeled '+ Insert new' and a circular icon with a lightning bolt. Below the editor, the text '3. Email' is visible.

“Rating” Question Type

The screenshot shows a configuration interface for a rating question. At the top right, there are icons for copy, delete, down arrow, and up arrow. Below these is a text input field containing "2. Question" with a small icon to its right. Underneath the text field is a row of five empty star icons. Below the stars are two dropdown menus: "Levels: 5" and "Symbol: ☆ Star". At the bottom right of the main configuration area is a toggle switch labeled "Required" which is currently turned off, followed by a three-dot menu icon. A dropdown menu is open from the three-dot icon, listing "Subtitle", "Label", and "Add branching". At the bottom left of the interface is a teal button labeled "+ Insert new" and a circular icon with a lightning bolt.

“Ranking” Question Type

The screenshot displays a ranking question interface. At the top right, there are icons for copy, delete, down arrow, and up arrow. The question text is "2. Question" with a small icon to its right. Below the question are three input fields labeled "Option 1", "Option 2", and "Option 3". At the bottom left of the options section is a "+ Add option" button. At the bottom right, there is a "Required" toggle switch (currently off) and a three-dot menu. The menu is open, showing "Shuffle options" and "Add branching" options. At the bottom left of the interface, there is a "+ Insert new" button and a lightning bolt icon.

“Likert” Question Type

2. Question

	Option 1	Option 2	Option 3	Option 4	Option 5	+
Statement 1	<input type="radio"/>					
Statement 2	<input type="radio"/>					

+ Add statement

Required ...

- Subtitle
- Add branching

+ Insert new

“File Upload” Question Type

The screenshot shows a survey question editor interface. At the top right, there are icons for mobile view, delete, down arrow, and up arrow. The question text is "2. Question" with a small edit icon to its right. Below the text is an "Upload file" button with an upward arrow icon. Underneath are two dropdown menus: "File number limit:" set to "1" and "Single file size limit:" set to "10MB". At the bottom right, there is a "Required" toggle switch which is currently turned on, and a three-dot menu. The three-dot menu is open, showing options: "Subtitle", "File type", and "Add branching".

+ Insert new



File uploads are available only for surveys sent to people within your organization

“Net Promoter Score” Question Type

The screenshot shows a configuration interface for a Net Promoter Score question. At the top right, there are icons for copy, delete, down arrow, and up arrow. The question text is "2. How likely are you to recommend us to a friend or colleague?". Below the question is a horizontal scale from 0 to 10. Underneath the scale are two text boxes: "Not at all likely" on the left and "Extremely likely" on the right. At the bottom right of the question area, there is a "Required" toggle switch which is currently turned on, and a three-dot menu icon. A dropdown menu is open from the three-dot icon, showing two options: "Subtitle" and "Add branching". At the bottom left, there is a teal button with a plus sign and the text "Insert new", and a circular icon with a lightning bolt.

Update Survey Settings

Settings

Who can fill out this form

- Anyone can respond
- Only people in Higgins Advisory, LLC can respond
Sign-in required to validate access within Higgins Advisory, LLC
- Record name
- One response per person
- Specific people in Higgins Advisory, LLC can respond

Options for responses

- Accept responses
- Start date
- End date
- Set time duration ⓘ
- Shuffle questions
- Disable question number for respondents
- Show progress bar
- Hide **Submit another response**

- Customize thank you message

Thank you for completing this evaluation survey. Your feedback is important to us and much appreciated.

- Allow respondents to save their responses
- Allow respondents to edit their responses

Response receipts

- Allow receipt of responses after submission
- Get email notification of each response
- Get smart notification emails to track the response status ⓘ

Preview & Test Survey

← Back Computer Mobile

English (United States) ▾ ⋮



Webinar Attendee Evaluation

Please complete this evaluation of the course instructor and materials to assist us in improving the quality and relevance of future courses. Thank you!

Hi, John. When you submit this form, the owner will see your name and email address.

Part 1 - Attendee information

Please complete the attendee information below

1. Full name

2. Email Address

English (United States) ▾ ⋮



Webinar Attendee Evaluation

Please complete this evaluation of the course instructor and materials to assist us in improving the quality and relevance of future courses. Thank you!

Hi, John. When you submit this form, the owner will see your name and email address.

Part 1 - Attendee information

Please complete the attendee information below

1. Full name

DISTRIBUTING SURVEYS AND COLLECTING RESPONSES



Send and Collect Responses

Send and collect responses

Anyone can respond

Only people in Higgins Advisory, LLC can respond
Sign-in required to validate access within Higgins Advisory, LLC

Record name

One response per person

Specific people in Higgins Advisory, LLC can respond

Icons: Link, People, Grid, Code

Copy link

<https://forms.office.com/Pages/ResponsePag...> Copy link

Shorten URL



Responders will see the form like this.

Send Survey Link via Outlook or Teams

Send and collect responses

Anyone can respond

Only people in Higgins Advisory, LLC can respond
Sign-in required to validate access within Higgins Advisory, LLC

Record name

One response per person

Specific people in Higgins Advisory, LLC can respond

To: Name, group, chat or channel...



You are invited to take this:
Webinar Attendee Evaluation

Hi! Would you mind taking 7 minutes to complete this form?
It would be great if you can submit your response by Feb 2, 2024. Thank you!

Outlook Teams (Message only)

Invitation will be sent via Outlook

Send

[Feedback](#)

Invite via QR Code

Send and collect responses ✕

- Anyone can respond
- Only people in Higgins Advisory, LLC can respond
Sign-in required to validate access within Higgins Advisory, LLC
- Record name
- One response per person
- Specific people in Higgins Advisory, LLC can respond

 Feedback

Webinar Attendee Evaluation



Recipients can scan the code on a phone or tablet to access the form. [Download](#)

Embed Survey Link in Website

Send and collect responses

Anyone can respond

Only people in Higgins Advisory, LLC can respond
Sign-in required to validate access within Higgins Advisory, LLC

Record name

One response per person

Specific people in Higgins Advisory, LLC can respond

Copy this code and paste it in a webpage or Sway.

```
<iframe width="640px" height="480px" src="https://forms.office..."
```

ANALYZING SURVEY RESULTS

Microsoft Teams User Satisfaction Survey

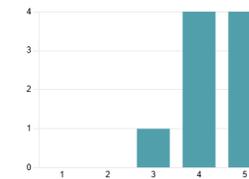
9 Responses 03:12 Average time to complete Active Status

[View results](#) [Open in Excel](#)

1. How would you rate your overall experience with Microsoft Teams?

[More Details](#)

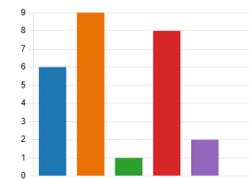
4.33
Average Rating



2. Which feature(s) have you found helpful?

[More Details](#)

- Channel Conversations 6
- Chat (1:1 and Group) 9
- Apps (Forms, Planner, PowerBI, ... 1
- Online meetings 8
- Calling 2
- Other 0



Review Response Summary

View individual responses

Microsoft Teams User Satisfaction Survey

11 Responses	02:48 Average time to complete	Active Status
-----------------	-----------------------------------	------------------

[View results](#) [Open in Excel](#) ...

- Delete all responses
- Print summary
- Share a summary link

1. How would you rate your overall experience with Microsoft Teams?

[More Details](#) [Insights](#)

4.27
Average Rating

Rating	Number of Responses
1	0
2	0
3	1
4	6
5	4

Analyze results in Excel

RECORDING AND EDITING VIDEOS WITH CLIPCHAMP ~~AND STREAM~~



Important Note

- Effective mid 2025, Microsoft has combined the Stream and Clipchamp apps into a unified interface under the Clipchamp brand
- You may still see the Stream app in your M365 portal.
- Recommendation is to use Clipchamp exclusively going forward.

Applications for Clipchamp

- Manage Teams meeting recordings
- Document internal business processes
- Create promotional videos
- Create on demand learning videos
- Use Copilot to create, summarize and query videos

Clipchamp Home Screen

The screenshot shows the Clipchamp home screen. At the top, there is a navigation bar with the Clipchamp logo, a search bar, and user profile icons. Below the navigation bar is a banner with the text "Create and watch videos, all in one place" and various colorful geometric shapes. Underneath the banner are two buttons: "Create a new video" and "Edit a video". Below these buttons are five icons representing different video creation options: "Upload a video", "Screen recording", "Camera recording", "Video project", and "Playlist". At the bottom, there is a filter section with tabs for "Recent", "All", "Created by me", "Meetings", "Playlists", "Projects", and "Favorites". A search bar for filtering is also present. Below the filter section is a table with the following data:

Name	Opened	Owner	Activity
 HeyGen Demo Video CPA Associations	Fri at 12:39 PM	John Higgins	

Document Processes

The screenshot displays the Microsoft Stream recording interface. At the top, it says "Stream" and "Recording in progress". A search bar is visible. Below the header, there's a "Planner" view showing a calendar of tasks. A video player overlay is positioned in the center, displaying the text: "Step 1: Open Microsoft Teams 'First, open the Microsoft Teams app on". The video player has a play button and a progress bar showing 13:34. At the bottom of the interface, there are controls for "Record again" and "Review".

Bookings App – Streamline appointment scheduling



HIGGINS
ADVISORY, LLC

Higgins Advisory, LLC

✓ SELECT A SERVICE

1-hour meeting

Schedule a one-hour meeting [Read more](#)

1 hour 🕒

30-minute meeting

Schedule a 30 minute meeting [Read more](#)

30 minutes 🕒

Select a service to see available dates and times

👤 SELECT STAFF (OPTIONAL)

Anyone ▾

📅 DATE

🕒 TIME

Select a service and date to see available times.

< > September 2023

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23

Things to Know About the Bookings App

Bookings app is included with all Microsoft 365 subscription plans

Streamlines and automates internal and external appointment scheduling

Directly integrates with Outlook and Teams

Available as an app in Teams

Personal or shared booking page option

Detailed setup instructions provided by Microsoft [Bookings support page](#)

Personal Booking Page





John Higgins
Booking Page

Choose a meeting type

 **60 Minute Meeting**
1 HR
Appointment for up to 1 hour meeting

 **30 Minute Meeting**
30 MIN
Appointment for a 30-minute meeting

Available times ✔ You are available ☰ 🌐

November 2023

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Today

Tuesday, November 28

10:10 AM	✔
10:40 AM	✔
11:10 AM	✔
11:40 AM	✔
12:10 PM	✔

Next >



HIGGINS
— ADVISORY, LLC —

Shared Booking Page



Higgins Advisory, LLC

SELECT A SERVICE

2-hour Advisory Meeting
Please use this option to book a meeting fo... Read more
2 hours ⌚

1-hour meeting
Schedule a one-hour meeting Read more
1 hour ⌚

30-minute meeting
Schedule a 30 minute meeting Read more
30 minutes ⌚

Booking for 1-hour meeting

January 04, 10:15 am

DATE

< > January 2024

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

TIME

9:15 AM	9:45 AM	10:15 AM
10:45 AM	11:15 AM	11:45 AM
12:15 PM	12:45 PM	1:15 PM
1:45 PM	2:15 PM	2:45 PM
3:15 PM	3:45 PM	

All times are in (UTC-05:00) Eastern Time (US & Canada)

ADD YOUR DETAILS

First and last name *

John Doe

Email *

jhd221@gmail.com



Notes

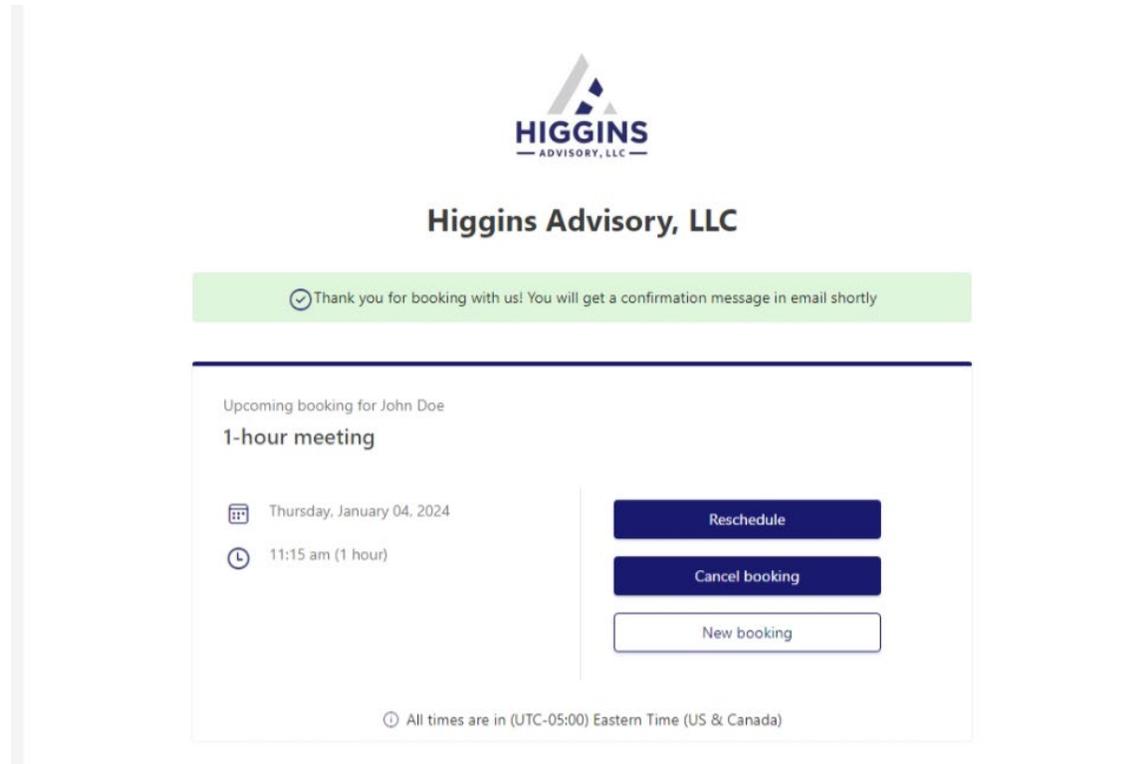
This is a demonstration of booking an appointment on the bookings page.

Data Collection Policy: When booking an appointment on our public calendar, only the information you provide is stored. Higgins Advisory, LLC guarantees that this data will not be sold or shared with external parties. Your privacy and trust are our top priority.

Book



Web Page Booking Confirmation



The screenshot displays a booking confirmation page for Higgins Advisory, LLC. At the top center is the company logo, which consists of a stylized 'A' shape made of three triangles (two grey, one blue) above the text 'HIGGINS ADVISORY, LLC'. Below the logo, the company name 'Higgins Advisory, LLC' is written in a bold, dark blue font. A light green horizontal bar contains a checkmark icon and the text 'Thank you for booking with us! You will get a confirmation message in email shortly'. Below this bar is a white rectangular box with a dark blue border. Inside this box, the text 'Upcoming booking for John Doe' is followed by '1-hour meeting'. To the left of the date and time, there are icons for a calendar and a clock. The date is 'Thursday, January 04, 2024' and the time is '11:15 am (1 hour)'. To the right of this information are three buttons: 'Reschedule' (dark blue), 'Cancel booking' (dark blue), and 'New booking' (white with a dark blue border). At the bottom of the box, a small icon and text state 'All times are in (UTC-05:00) Eastern Time (US & Canada)'.

Client / Customer Booking Email Confirmation



Higgins Advisory, LLC
248.390.9754
<http://www.higginsadvisoryllc.com/>

Hi John Doe,
Your booking is updated.

Booking details

Service Name	1-hour meeting
When	Thursday, January 4, 2024 12:15 PM - 1:15 PM (UTC-05:00) Eastern Time (US & Canada)

[Reschedule](#) [Join your appointment](#)

Higgins Advisory, LLC
The Policies and Practices of Higgins Advisory, LLC apply to the use of your data

Configure Staff

The screenshot displays the 'Bookings' application interface. On the left, a navigation menu includes 'Calendar', 'Booking page', 'Customers', 'Staff' (highlighted with a red circle), 'Services', 'Business information', and 'Integrations'. The main content area shows the profile for 'John Higgins', an Administrator. It includes a 'My profile' section with a photo and contact information, and a 'Contact Information' section with fields for Email (john@higginsadvisoryllc.com), Phone number (248-390-9754), and Teams (john@higginsadvisoryllc.com). The 'Membership information' section shows a status of 'Bookable', last changed on Sun 11/26/2023 2:53 PM, and an email last sent on the same date. There are also buttons for 'Show more contact information', 'Show services', and 'Show in calendar'.

Configure Services

The screenshot displays the Microsoft Bookings interface. On the left, a navigation pane lists various options: 'Calendar', 'Booking page', 'Customers', 'Staff', 'Services' (highlighted with a red circle), 'Business information', and 'Integrations'. The main content area shows the configuration for a '30-min meeting' service. The service is identified as a '1:1 service' and an 'Online Meeting'. Below the service name, there are tabs for 'Overview', 'Service details', 'Calendar and Availability', and 'Staff'. The 'Overview' tab is active, showing 'No upcoming appointments' and a 'Show calendar' button. The 'Service Details' section lists the following information:

Field	Value
Service booking page	https://outlook.office365.co...
Duration	30 minutes
Default price	Price not set
Description	Grab some time with us for ...

Below the service details, there are links for 'Show all service details' and 'Show all assigned staff'.

Configure Business Information

The screenshot displays the 'Bookings' configuration interface. At the top, there is a blue header with a menu icon and the text 'Bookings'. Below the header, a navigation bar includes a back arrow and the text 'Back to all booking pages'. A dropdown menu shows 'Demonstration Booking ...'. To the right of the navigation are 'Save' and 'Discard' buttons. The main content area is titled 'Business information' and contains several expandable sections:

- Basic details:** Includes business name, address, phone, links and other basic details.
- Privacy policy and Terms and conditions:** Enter business Privacy policy and Terms and conditions details.
- Business logo:** Add or change your business logo that your customers will see in your booking page, reminders and messages. This section includes a placeholder image of two people in a meeting and 'Change logo' and 'Delete logo' buttons.
- Business hours:** Enter information about your business hours.
- ACS App Integration:** Connect your Azure Communication Service App with Bookings.

Personal Booking Page Meeting Type

New meeting type

 Add a title

 [+ Category](#) ▾

 Add a description

 Location  Teams meeting

 30 mins ▾

 **Public**
These will appear on your booking page

Private
Only people with a booking link can view this

Schedule customization ⓘ

 Use my regular meeting hours ▾ [See regular meeting hours](#)

[+ Advanced options](#)

Lists App - Create and manage customized lists



Microsoft Lists

+ Add new item Edit in grid view Undo Share Copy link Export Forms **New** Automate Integrate ...

My lists
Higgins Advisory, LLC Expense Tracker ☆

Item	Date	Amount	Category	Description
Postage stamps	September 29, 2023	\$15.00	Postage	20 Forever stamps
Lunch with ABC Co	December 15, 2023	\$45.00	Meals / Entertainmer	
Dinner	July 17, 2024	\$50.00	Meals / Entertainmer	
		Sum 110.00		

New item

Item *
Enter value here
You can't leave this blank.

Date
Enter a date

Amount
\$ Enter a number

Category
—

Description
Enter value here

Receipt
Add an image

Attachments
Add attachments

Power Automate – Automate business processes



The screenshot displays the Microsoft Power Automate interface with a grid of 16 automation flows. Each flow card includes an icon, a title, the creator, and the frequency of the flow.

Flow Title	Frequency	Count
Notify and Email when a new file is uploaded to OneDrive	Automated	24682
Trigger a flow with a Power BI data-driven alert	Automated	185669
Save Office 365 email attachments to specified OneDrive for Business folder	Automated	341615
Notify about rows in a SQL DB	Scheduled	11016
Notify me and store the response when a student completes a quiz	Automated	100975
Send me an email when a new message is added in Microsoft Teams channel	Automated	152645
Create a task in Planner from Microsoft Forms and post message in Teams	Automated	212161
Send an email to responder when response submitted in Microsoft Forms	Automated	546017
Get a push notification when a new file is added in OneDrive for Business	Automated	100826
Form processing to email and SharePoint	Automated	318651
Save Gmail attachments to your Google Drive	Automated	76803
Send specific files created in OneDrive for Business as email attachments	Automated	49495
Send an email when a survey response is submitted on Survey123	Automated	12850
Email me with a list of upcoming Calendar events	Scheduled	54469
Email yourself new Tweets about a certain keyword	Automated	6657
Add Planner tasks to an Excel Online Business spreadsheet on weekly basis	Scheduled	36428

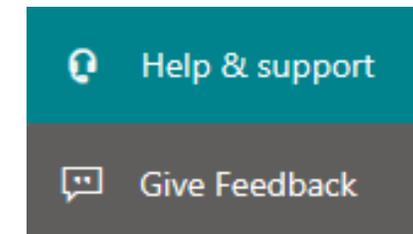
GETTING HELP



Where Can I Get Help?

Implementation & Support Resources:

- Probably not your current IT support!
- [Microsoft sponsored 365 training & support](#)
- [LinkedIn Learning](#)
- Microsoft 365 CPE programs
- Microsoft 365 Admin support
- [Microsoft Support Offering](#)
- Microsoft Business Partners
- [Upwork](#) for Microsoft support



Microsoft Self-service Support

Help & support

Give Feedback

Help Support History

How can we help?

Tell us your problem so we can get you the right help and support.

How do I configure to allow guest users in Teams

- How do I enable Teams Guest Access
- Cannot add guest to teams
- How do I allow Skype for Business users to communicate with people with regular Skype
- Guest user is unable to access files in Teams
- How do I configure Teams Direct Routing

Self Help Contact Support Support History

How can we help?

Tell us your problem so we can get you the right help and support.

How do I configure to allow guest users in Te...

Adding external guest users to Teams is a powerful collaboration tool. Lets learn more about the problem you are having so we can provide the best solution.

Note that in many cases, the best step is to run the support diagnostic we offer which will run comprehensive tests on your configuration and offer the most accurate solution.

Is your Guest access issue affecting specific guests, or all guest accounts?

Issue is with all guest accounts

Only happens to specific guests

More Help

[Guest access in Microsoft Teams - Microsoft Teams](#)

Guest access in Teams requires configuring other settings in Microsoft 365, including settings in Microsoft Entra ID, Microsof...

[Turn guest access in Microsoft Teams on or off](#)

Configure guest access in the Teams admin center. Sign in to the Microsoft Teams admin center. Select Users > Guest access. Set...

[Use guest access and external access to collaborate with p...](#)

1 Provided that the user has been added as a guest and is signed in with the guest account. 2 Only by email or Session Initiation...

Contact support

Legal | Privacy & Cookies

Back

Self Help **Contact Support** Support History

Get support from an agent

Please include #M365Copilot in the Title if you are contacting us for a Copilot issue

Title*

How do I configure to allow guest users in Teams

Description (Stronger descriptions result in quicker resolutions)

Describe your issue in detail

Confirm your number*

+1

Please enter a valid phone number

Confirm email addresses of authorized contacts*

Microsoft will work directly with contacts listed to resolve this service request.

Please enter a valid email address

Consent to the recording of all calls necessary to resolve this service request. This can be changed at any time.*

--choose one--

Attachments

Add a file or screenshot or video

Contact me

Legal | Privacy & Cookies

Microsoft Business Partners

The screenshot displays the Microsoft AppSource Partners interface. At the top, the Microsoft logo and 'AppSource' are visible. A search bar contains the text 'cygnus'. Below the search bar, navigation tabs include 'All', 'Apps', 'Categories', 'Industries', 'Consulting Services', and 'Partners'. The main heading is 'Browse partners' with a subtext 'Filter and sort partners to refine the results.' On the left, a 'Filters' sidebar includes 'Clear all', 'Search filters', a location filter for '48306, Rochester, Michigan, United States (100 mi radius)', and several expandable categories: 'Microsoft Customer Size', 'Partner capabilities', 'Industries', 'Products (1)', 'Solution category', 'Services', and 'Environmental, Social, Govern...'. A 'Microsoft 365' filter is active. The main area shows 'All results' sorted by 'Best match'. There are ten partner cards displayed in a grid. Each card includes a logo, the partner name, location, Microsoft services (e.g., Azure, Teams), and a brief description. A 'Contact me' button is present on each card.

Partner Name	Location	Microsoft Services	Description
Red Level	Novi, Michigan, United States	Azure +12	Red Level is multi-year Microsoft Partner of the Year award winner based in Michigan with offices in Metro Detroit an...
TMR Consulting (Private) Limited	Flat Rock, Michigan, United States	Teams +16	TMR Consulting, a Microsoft Dynamics Partner company official Tier 1 CSP and Gold Partner in MBs Business and having ...
Apex Digital Solutions	Southfield, Michigan, United States	Azure +12	Apex Digital Solutions is a technology success provider enabling business transformation for customers to be more sec...
Worksgighted LLC	Wixom, Michigan, United States	Azure +16	Grow your business with a technology partner that puts your business goals first. We service all industries but hav...
OnPar Technologies	Troy, Michigan, United States	Azure +8	OnPar Technologies is a full-service Microsoft solutions provider delivering innovative business solutions to custome...
CrucialLogics Inc.	Okemos, Michigan, United States	Enterprise Mobility & S... +13	2022 Microsoft Impact Award Winner Welcome to CrucialLogics Inc., a Microsoft Solutions Partner with a mission to s...
Sentinel Technologies Inc.	Livonia, Michigan, United States	Microsoft 365 +8	At Sentinel, we've always taken the lead. Since 1982, Sentinel Technologies has been recognized as a premier business...
Communication Square	FARMINGTON HILLS, Michigan, United States	Azure +12	A Microsoft FastTrack partner, Microsoft Co-sell ready partner and a Microsoft tier one cloud solutions provider. Als...
TechHouse	Plymouth, Michigan, United States	Azure +16	TechHouse works with small and mid-market organizations to ensure technology is an accelerator, not an obstacle. We s...
EEC Services FZ LLC	Detroit, Michigan, United States	Azure +9	EEC Services is a channel-centric IT consulting firm, servicing EMEA and the Americas. We specialise in workspace, mo...

WRAP-UP



In Summary

- Microsoft 365 is one of the most underutilized software investments in business
- The full value of Microsoft 365 is based in the integration of the apps
- Take advantage of the “low hanging fruit” opportunities throughout the Microsoft 365 ecosystem of apps

Questions ?



Thank you!!!

Let's connect on LinkedIn →

