



# Crash course in Office 365:

How it can help you grow  
your business

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# 00. Introduction

You already know the productivity power of Office applications like Word, PowerPoint, and Excel. This crash course will show you how adopting cloud-based Office 365 gives you ever-improving versions of those apps, with new capabilities delivered every month. You'll also learn how Office 365 empowers you to access your content from any device, coauthor with anyone in real time (regardless of whether or not they've purchased a copy of Office), and use the power of artificial intelligence (AI) to create more impactful content with less effort.

Office 365 gives you the Office apps you already know, along with powerful, simple new ways to work better together. That means services like business-class email, online storage, and teamwork solutions that you can now access from almost anywhere—all designed for small businesses like yours. With Microsoft Teams included, you can host productive online meetings with coworkers, customers, and suppliers no matter where they're located.

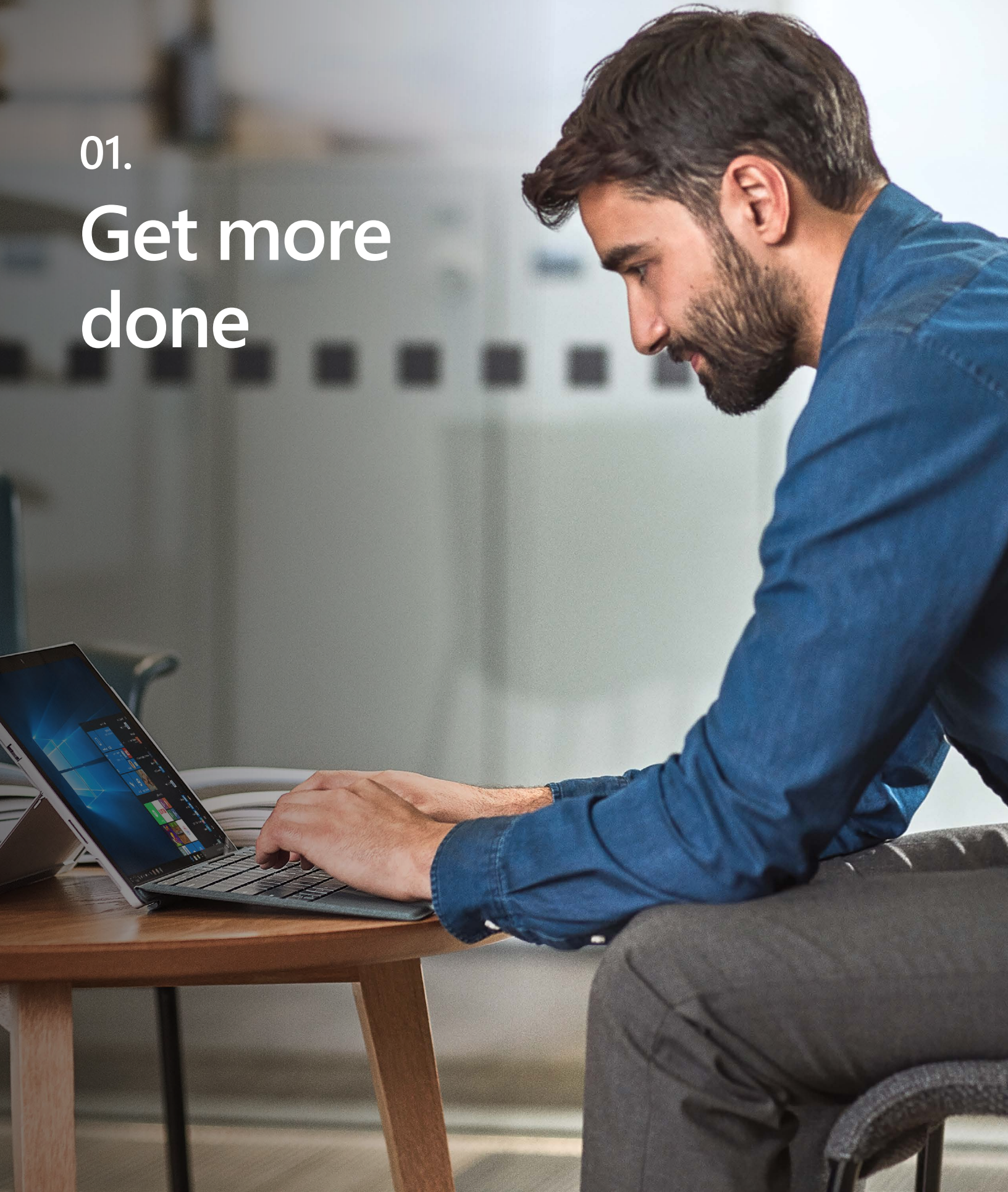
Getting more capabilities in one solution reduces the amount of time you spend managing technology and gives you the most value for your investment. Office 365 also provides peace of mind that Microsoft is working 24/7 to help protect you against security threats—including automatic updates to ensure your employees will always have the latest features.

If you have more advanced needs, consider Microsoft 365, which provides advanced security and device management capabilities to help safeguard your business. It's a complete, intelligent solution that empowers your employees to be creative and work together, securely.

Whatever you choose, you'll get the right solutions for today, with room to grow tomorrow. Ready to get started? Let's dive in.

01.

# Get more done



**Running a business means being ready to work wherever you go—and giving employees that same ability.**



## Optimize your team

Office 365 helps your team perform at its best, whether in the office, working from home, at a client site, or on the road. You get Word, Excel, and PowerPoint for iOS and Android in addition to the PC versions can install on up to five devices.

But it's also much more than that. With OneDrive for Business, team members can securely access, save, and share files in the cloud using their favorite devices—including Word, Mac, iOS, and Android. Plus, the services included in Office 365 all work together, so you can focus on getting work done rather than managing apps and passwords.



**The number-one benefit of Microsoft 365 for us has been the improved access. We have access to everything, anywhere we are in the world, as long as we can get online.**

**Will Hawkins**  
*President,*  
*Allpro Construction*

## Take your work with you

With Office 365, the familiar Office apps you use every day become productivity powerhouses, giving you the ability to edit, share, and work together wherever your employees go.

### Word

Need to give feedback to a colleague while commuting? Edit documents on your Android or iPhone with the Word mobile app. To add comments, tap anywhere in a document, then click Edit and type your comment. If this is your first time adding a comment, you'll be asked to enter a username so other people know who edited the document.

### Excel

Mobile-friendly Excel shortcuts make it easy to gain insights from information. Add formulas using your tablet's on-screen keyboard, or by tapping the Formulas tab. The Recommended Charts feature helps you pick visualizations that make sense for your screen.

### PowerPoint

Prep and present on the go, right from your tablet or smartphone. Presenter view gives you full control over what your audience sees, showing speaker notes only on your mobile device. New ink, laser pointer, and highlighting features help emphasize key concepts as you present.

### OneNote

With OneNote 2019, you can invite others to a shared notebook by choosing File > Share > Invite People. To share a notebook during a meeting, choose File > Share > Share with Meeting. After others in your team open the notebook, anyone with permissions can add meeting notes simultaneously, which then sync automatically.

## Keep your files handy

OneDrive for Business enables effortless access to files, including 1 TB of data for each user—so your employees can work together and share documents easily, wherever they are. Preview more than 270 common file types right from OneDrive for Business—no need to open a separate app. You can even stream video on demand without waiting for it to download. Access and edit documents offline, and when you're back online your updated files sync automatically. Pick up where you left off in your document when switching devices. View or revert to a previous version of your document thanks to automatic saving and file versioning.

## Get more organized

Stay productive with a clear, unified view of your email, calendar, contacts, and tasks in one place with Outlook—on PCs, Macs, iOS, and Android, as well as through your web browser. You can also get business-class email without the hassle of managing your own server thanks to full-featured Exchange in the cloud.

## Give employees one place to work together

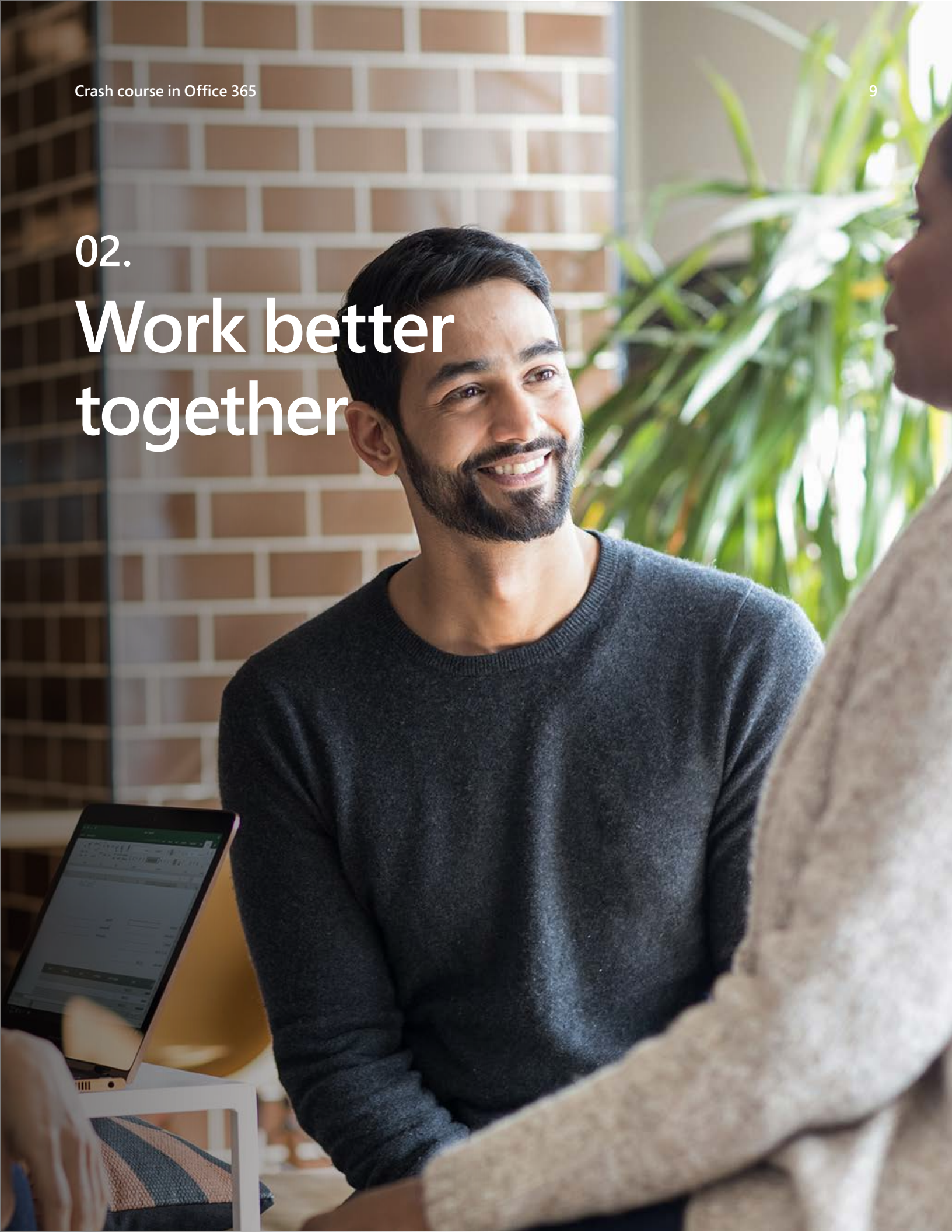
Microsoft Teams, part of Office 365, is a digital hub where employees who work closely together on core projects—including people outside your organization—can actively connect and collaborate in real time to get things done. Have a conversation right where the work is happening, whether coauthoring a document, having a meeting, or working together in other apps and services. Teams is the place to have informal chats, iterate quickly on a project, work with team files, and collaborate on shared deliverables.

It brings together conferencing, online storage, group workspace, and Office apps all in one place, increasing your productivity and helping you grow with confidence.



02.

# Work better together



**Making decisions,  
generating fresh ideas,  
and building close  
relationships with suppliers  
and customers demands  
good collaboration.**



## Work better together— anywhere

With more employees working from home, on the road, or from other locations, collaboration isn't always easy. Using Microsoft Teams in Office 365, you can easily host online meetings to get work done in real time, bringing together employees, customers, and suppliers all in one place.

With Office 365, you can easily set up online meetings with either voice only, or voice and video. People can also work on documents together in real time, even if they are in different locations, and immediately see changes.



**Let your people work from wherever, because with Office 365 you have a digital environment that allows you to track what your people are working on. There are huge savings opportunities in shifting to a digital office.**

**Jarom Reid**  
*Chief Executive Officer,*  
*Carpool Agency*



## Coauthor with confidence

Real-time coauthoring allows your employees to edit the same version of a document at the same time. This eliminates the need to email multiple versions back and forth.

To get started using real-time coauthoring, save your document to OneDrive for Business. Then click the Share button, located in the upper-right corner of the window. You can share and work together on files with people inside and outside your organization—even with those who don't have Office 365.

- In the History pane, see at a glance when a file was created and modified.
- Revisions are listed by date and name, so you can follow up with questions if needed.
- Click on a version to open it and see how it differs from later versions of the same file.
- If you want to revert to an older version of a file, just hit Restore.

## Share simply

Stop the confusion created when employees send documents by email. With Outlook 2019, you can upload files to OneDrive, or easily attach them to an email, enabling everyone with authorization to access, view, and edit the same version. When attaching a file to an email, you'll see a list of your recent documents — so you can spend less time searching for the right one to attach.

## Master your meetings

Effective communication strategy is at the heart of any successful team. From initiating a one-on-one dialog to driving a team meeting, Office 365 gives your employees control over their conversations, so they feel connected wherever they are.



### Teams puts you in the driver's seat

- Before a meeting: Share files in Teams so it's easy to access relevant documents and other materials.
- During a meeting: Participants can chat, share their screens, and share files. The meeting experience makes it easy to Whiteboard, instant message, coauthor, and move seamlessly from voice to video. Record the meeting with one click to share later.
- After a meeting: Put follow-up actions in the conversation thread of your Teams channel.



### Meet on the go

Host and join meetings from the Teams app. You can chat, manage meeting controls, zoom in when someone is sharing their desktop, and even reschedule meetings all from your mobile device.



### Bring people together

With one click, anyone you authorize inside or outside your company can join your online meeting, from any device. Choose to meet right away, or schedule from Outlook for later.



### Be creative and productive

When you meet through Teams, it's not all talk. You can present with interactive tools such as on-screen annotation, highlighting, and virtual laser pointer. Draft, draw, and edit together, and see each other face to face with HD videoconferencing—it's almost like being in the same room.

## Get a digital home for projects

Whether you're teaming up on a new product strategy, a sales presentation, or a key company initiative, SharePoint keeps content at the center of teamwork. Files, sites, and content are easily shareable and accessible across teams and organizations.



03.

# Build your business



Success comes  
down to finding  
new customers—  
and delivering great  
experiences that  
keep them loyal.





Office 365 gives you new ways to track and manage prospects, build deeper relationships, and create a polished, professional image so you can stay competitive as customer expectations grow. It also helps you streamline processes, giving your employees more time to focus on value-added tasks and provide great service.



**We use Microsoft 365 Business to help keep production running smoothly and to make sure that we are getting the right message to the right people at the right time.**

**Heyward Garner**  
*Chief Operating Officer,*  
*Garner Foods*

## Bring your ideas to life like a pro

Your Office 365 apps learn from your personal style and help make you more productive with built-in intelligence designed to save you time and get the results you want.

- Word Editor is an advanced proofing tool that checks spelling and grammar and makes intelligent style suggestions to help you write with greater impact, whether it's a customer proposal or an all-company memo.
- PowerPoint Designer automatically generates design ideas to match the content you're putting on a slide for professional-looking presentations every time. Ask for design ideas by choosing Design > Design Ideas on the ribbon.
- Smart Lookup lets you select a word or phrase in Excel, Outlook, Word, or PowerPoint and right-click to get information, definitions, history, and other resources right on the page.
- Professionally designed templates speed the creation of almost any document, whether it's a business pitch, marketing plan, or budget proposal.

## Engage with your customers more effectively

As your business grows, keeping track of customer information can be a challenge. Office 365 can provide you with easy-to-use tools for ensuring you never lose sight of opportunities.



### Keep customers close

Still keeping customer details in a spreadsheet? Nurture relationships with Outlook Customer Manager, the CRM designed especially for businesses with fewer than 10 employees.

It automatically tracks customer interactions and lets you view customer details, history, deals in progress, and pending tasks right within Outlook.



### Customer appointments made easy

Simplify the process of scheduling and managing customer appointments with the convenient, web-based Microsoft Bookings app, empowering customers to set appointments at their convenience. Share your appointment schedule on Facebook, manage customer preferences, customize staff and service scheduling, and manage it all from your browser or mobile app. Select Bookings from the Office 365 app launcher.



### Get paid on time

Invoicing is an easy-to-use online and mobile app that helps you send invoices, manage your expenses, and monitor your cash flow. With Invoicing, you can get paid faster by seamlessly creating, editing, sending invoices, and accepting payments. You can even add new customers, mark invoices as paid when you receive payment, and view monthly and yearly sales. Get paid via PayPal and sync information with QuickBooks.

## Coordinate your employees and projects

You know how important it is to work efficiently. With easy-to-use planning, scheduling, and task-tracking tools, you can get more done and save time and money.



### Plan to win

Take the surprises out of teamwork and get more done. Microsoft Planner makes it easy for your team to create new project plans, organize and assign tasks, share files, chat about what you're working on, and get updates on progress. Launch Planner from the Office 365 app launcher with a single click to create a plan, build a team, organize and assign tasks, and update status as you go. It's an easy way to keep your projects on track.



### Beat those deadlines

Tackle your task list using Microsoft To-Do, which helps you manage, prioritize, and complete the most important things you need to achieve every day. Integrated with Office 365 apps, To-Do provides intelligent recommendations about what's most important. Suggestions look at your to-dos across your lists and recommends the most important ones to focus on. Add reminders, due dates, and notes, and personalize each list with colorful themes.

## Optimize your processes

Whether it's filling out forms, tracking expenses, or moving data from one app to another, every company has mundane tasks that take up precious time. Office 365 gives you easy ways to automate your everyday administrative tasks to free up time for more important work.

### **Work less, do more**

Microsoft Flow helps you create automated workflows to share information between apps, set up approval chains, get notifications, and more. Start from a wide range of prebuilt templates that make it simple to use intelligent automation. For example, use Flow to transfer information entered by a sales team in Microsoft Dynamics to a SharePoint list used by operations. Flow also integrates with on-premises and third-party services.

### **Create custom apps—no code required**

Build apps with the power to transform your business using PowerApps. Without writing code, you can create apps that interact with data in SharePoint lists and libraries, as well as other cloud and on-premises sources. Use PowerApps to create digital experiences that take advantage of technology—such as cameras on mobile phones—to work in innovative ways.

### **Make every mile count**

If you travel, tracking your mileage can be one more daily hassle that slows you down. Office 365 offers MileIQ,<sup>1</sup> a smart app that automatically tracks your miles, helps you easily classify drives, and generates comprehensive reports for reimbursement or tax deduction.

# 04. Simplify to succeed



With an assortment of third-party tools and subscriptions, you have to manage everything separately, your data is all over the place, and the learning curve for employees can be high.



## Simplify to succeed

Office 365 brings the widest range of workplace solutions together in one place, making them easy to use, easy to manage, and powerfully productive. With an online dashboard, you have one place to manage users, devices, and services. Plus, with Office 365 in the cloud, Microsoft takes care of the infrastructure—so you can focus on growth. You don't have to purchase or maintain on-premises servers to have a complete business solution.



**We migrated early based on the recommendation from Microsoft. Not only was it a smooth transition, but it will save us money by simplifying management and eliminating our need for hardware. We're down to just one server.**

**Rick Lord**

*President and Chief Executive Officer,  
AIM*

## Always up to date

Unlike earlier desktop versions of Office, Office 365 updates happen automatically, ensuring your employees always have the latest features and updates. You don't have to manually install upgrades or worry about licensing them individually. It's all included.

## Get employees up and running—fast

Setting up new employees with Office 365 is simple—they just sign in to office.com with their login and password. They can immediately access online versions of Office apps, email, and all the tools that come with Office 365. One license covers fully installed, always-up-to-date Office apps on up to five phones, five tablets, and five PCs or Macs per user. On desktops, productivity starts right away thanks to streaming download technology. When an employee leaves, removing their access to your business data is just as easy.

## Get the most from your investment

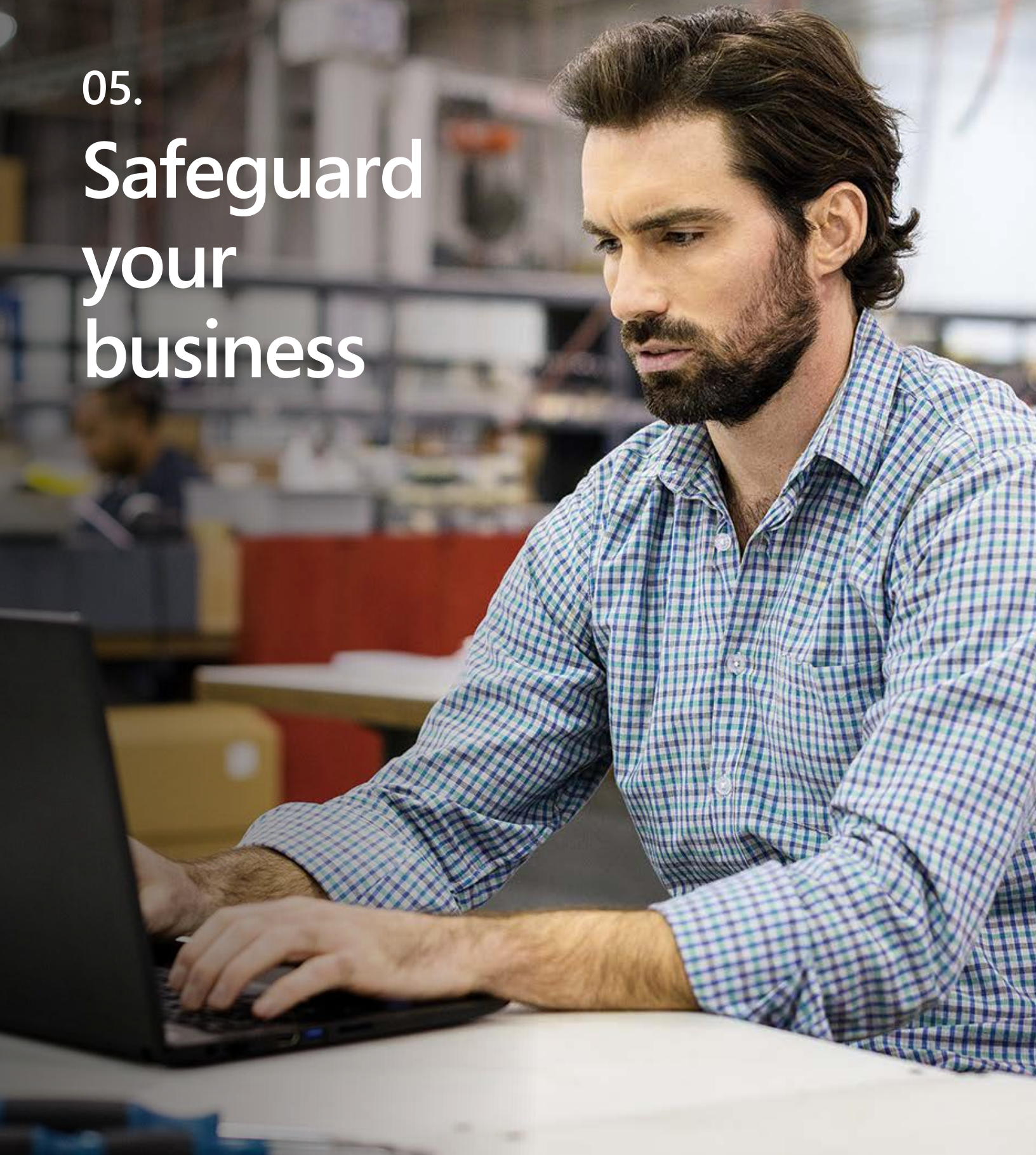
Because Office 365 is delivered as a cloud subscription service, you don't have to wait to get the latest features and apps, and you don't pay more for updated versions. You can be assured that you have the most up-to-date solutions for growing and managing your business, on every device, without having to manually install anything. Plus, with guaranteed 99.9 percent uptime and a financially backed service level agreement (SLA), you can rest assured your tools will be there when you need them.

## Sign in once

Keeping track of multiple passwords doesn't just slow things down—it can lead to risky practices such as writing down passwords on paper or reusing them. Office 365 gives employees access to everything they need with one password, with end-to-end security across all applications and services.



# 05. Safeguard your business



Keeping your data safe from cyberthreats is a top priority—a breach could bring significant legal, financial, and customer satisfaction consequences.



With Office 365, security is built in at every layer to help keep your data safe from attackers and accidental leaks, control who has access to information, and provide peace of mind that you are compliant.



**Data loss prevention sold us on Microsoft 365. Having our identities hosted in the cloud means we won't have to worry about a domain controller failing and causing data loss or downtime.**

**Ryan Taylor**  
*IT manager,*  
*iSalon*

## Protect against security threats

You don't need a big IT department to get enterprise-grade protection. With best-in-class services designed for businesses like yours, Office 365 helps protect against spam, malware, viruses, phishing attempts, malicious links, and other risks.

## Keep advanced threats at bay

Sophisticated threats can fool even vigilant employees. Office 365 Advanced Threat Protection guards against hidden malware in links and email attachments, and keeps you a step ahead of viruses, ransomware, and evolving attacks.

## Control your data wherever it goes

Mobility is a good thing, but only if you can keep your data safe. Office 365 Mobile Device Management lets you set policies to help control access to your organization's Office 365 email and documents for supported mobile devices and apps. With an advanced solution, such as Microsoft 365 Business, if a device is lost or stolen, you can remotely wipe it to remove sensitive organizational information.

## Prevent data loss

Office 365 also helps you restrict the copying or saving of company information to unauthorized apps and locations. It prevents sensitive information, such as social security numbers or credit cards, from leaking—saving your business from the costs and damage of a data breach.

## Manage compliance more easily

Microsoft also offers robust contractual data privacy and security commitments by default to help customers comply with local and national regulations. The Online Services Terms contract includes the EU Model Clauses, UK Data Protection Act, HIPAA/HITECH, and many other provisions. It applies as soon as customers accept the Microsoft License Agreement.

## Microsoft doesn't use your data

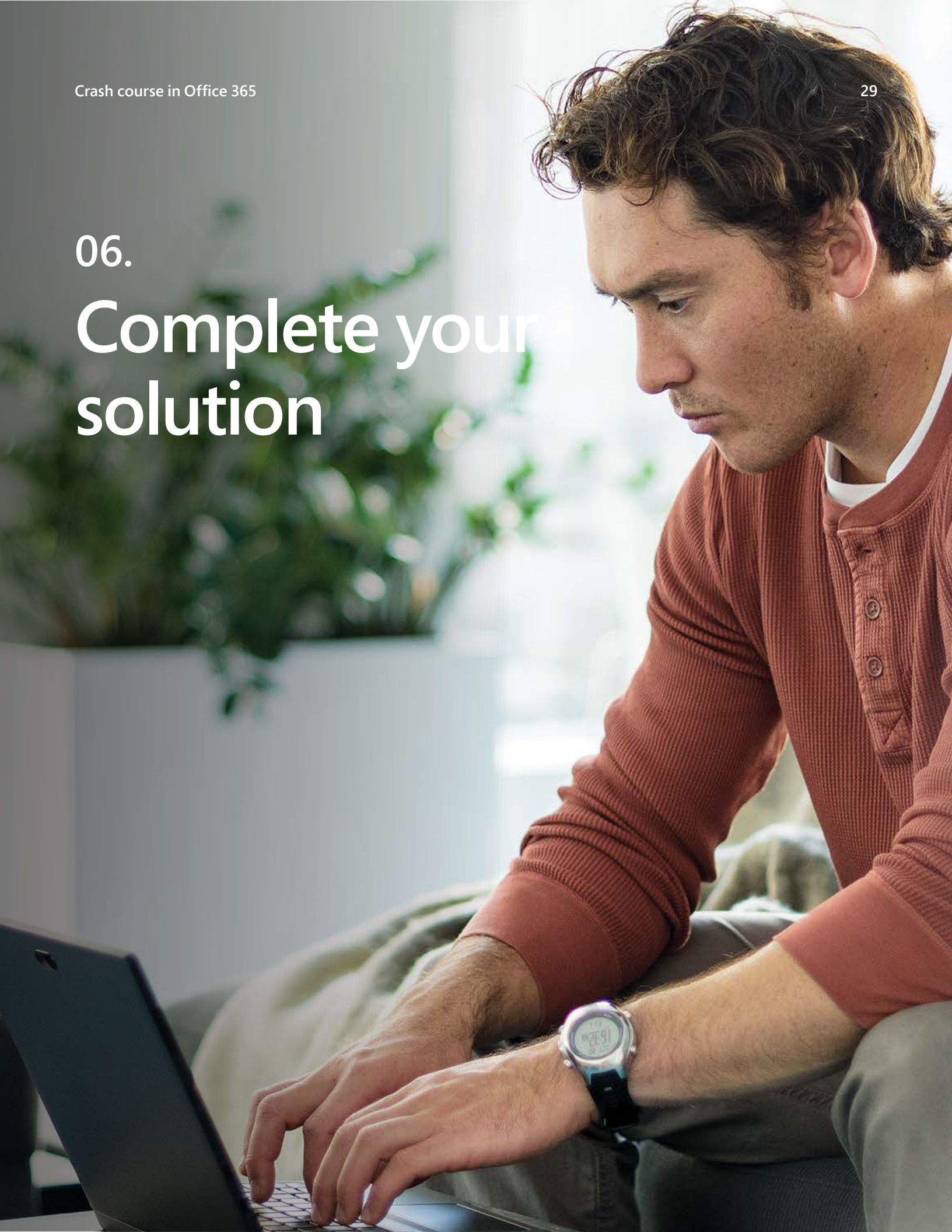
Microsoft's commercial online services, including Office 365, do not capture, maintain, scan, index, share, or use any data-mining technology. This means your email will never be scanned for ad-serving purposes, nor will the data you store with us be read or unknowingly shared with third parties in any way. You'll also benefit from fully customizable controls that enable you to tailor enterprise-grade security services to best meet your company needs.

## Email security that just works

Email is a major gateway in and out of your organization. Prioritize security across the board with protection from external threats and defend with internal access controls. To deal with external threats and unknown risks, Office 365 helps secure employee mailboxes against sophisticated attacks in real time, eliminating the need to install additional virus-scanning software. Every email attachment or link is automatically evaluated for suspicious activity, and malicious content is neutralized before an attack can occur.

06.

# Complete your solution



By choosing Office 365, you're investing in growth and success. Its productivity and collaboration tools—plus built-in security—provide a solid foundation for your modern workplace.



How you take the next step can enable even greater transformation. When you get Office 365 as part of Microsoft 365 Business, you get the power and familiarity of Office 365 with advanced security technologies, as well as streamlined management and maintenance, built specifically for businesses like yours. It's designed to keep company data secure while ensuring employees are their most productive, in the office or on the go.

Microsoft 365 includes features such as:

- Information protection policies to help control and manage how information is accessed.
- Controls to protect your company data on personal mobile devices.
- The ability to securely manage iOS, Android, Windows, and macOS devices.



**Once our employees understood the full capabilities of Microsoft 365, productivity and efficiency increased definitively.**

**Christoffer Tykö**

*Internal IT Team Leader,  
Play'n GO*

# Crash course finish line

This crash course in Office 365 demonstrates the breadth of capabilities it offers for empowering your business.

Building on the foundation of Office solutions you use every day, Office 365 brings you new capabilities for working better together, wherever opportunity takes you. From easy online meetings to mobile document editing, from simplified management to comprehensive protection for your sensitive data, it helps you take advantage of all the talent and resources you have to compete and win.

Now that you've completed the Office 365 crash course, it's time to take a closer look at exactly which Microsoft plan is right for your business.

**See plans and pricing  
for Office 365 Business >**

<sup>1</sup> Available only in the US, UK, and Canada.