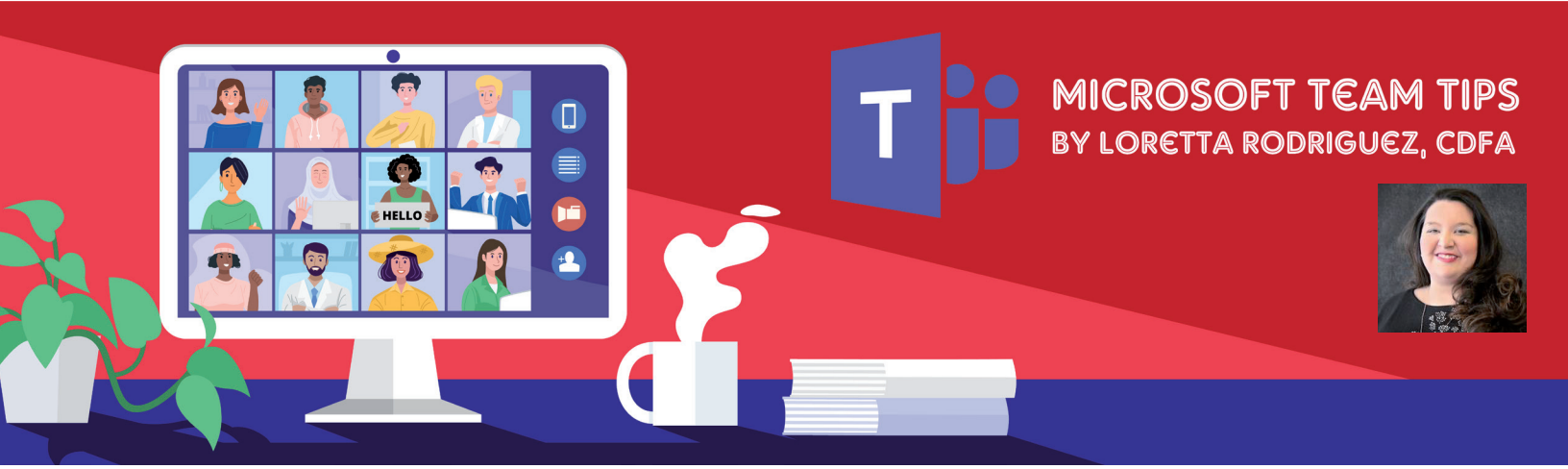
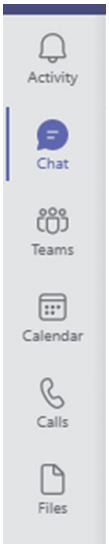


MICROSOFT TEAM TIPS

BY LORETTA RODRIGUEZ, CDFA

Welcome to the Microsoft Teams Tips column! Whether you have been using Microsoft Teams for months or you are considering adding Teams to your business regimen, we hope you will be able to find a useful tip from each quarterly column.

The bottom line is that Microsoft Teams was designed to provide an easier way for groups of people to communicate and collaborate. You can call, chat, meet, and team with individuals inside your organization with ease and with folks outside of your office.



Chat Feature

- The chat feature is similar to any "instant messaging" you may have used on other programs. Quickly find coworkers and start a conversation, add emoticons, send GIFs, stickers or even send documents.
- Hover over the dots at the bottom of message box to get more options like Edit (which is great for fixing typos), Delete (for those "oops! Wrong person!" moments), and even Share to Outlook.
- TIP: A default setting in Teams is to send read receipts. When someone has viewed your chat message, you see ( ) at the end of your last sent message. To disable, go to Account-Settings-Privacy-Read Receipts.
- Edit font, mark message as important, add an attachment, schedule a meeting, stream, offer praise and more. All within a chat!

Teams Feature

- This feature allows you to join an existing team or create a new one.
- Create a Team page for each project team in your office. Create a team for your entire accounting group, for the accounting group in each office, for the accountant and the managers they support. Create a Teams page for your colleagues on the softball team or bowling league. Create a Team for the animal lovers in the office to share photos and stories. The possibilities are endless!
- A Teams page allows you to chat with members without those dreaded reply all emails.

- Look for more Teams feature tips next quarter!

Calendar Feature

- The calendar feature can be linked to your current calendar software such as Outlook.
- TIP: When you use the calendar feature, the "Join" button for Teams meetings can be opened or joined with one click within schedule view instead of opening the individual meeting.

Calls Feature

- The calls feature allows you to make outgoing or accept incoming calls from anyone.
- TIP: While on a call, share your screen. Trying to explain a problem or talk through a solution with your project team? Share your screen to show the group all at once and not have to write out a lengthy email explaining the issue. This option works on any Teams to Teams call or in a Teams meeting.
- While in a call or meeting, you can still use the chat feature within the call or meeting window to make comments or ask questions and use reactions to raise your hand or applaud.
- When a meeting has 5 or more individuals, more options are made available like "Together Mode".

TIP: You can arrange the tiles for Chat, Calls, Teams, etc. in the order that best suits you. Just click and drag.

TIP: You can arrange your Teams in any order too. Move your most active Teams to the top.

Microsoft Teams is very versatile and constantly updating their features to find the best solutions for their customers. I look forward to sharing more about the various tools within Teams and finding valuable tips for everyone to use.

