

# Microsoft 365 Deep Dive

## Save More Time, Make More Money



Set your browser to  
**HIGGINS.CNF.IO**  
For interactive polling  
and Q & A

Presented By  
John H. Higgins, CPA.CITP  
Rochester, Michigan

# Learning Goals



- Identify the capabilities of Microsoft 365 that enhance operational efficiency for accounting, tax, and advisory practices.
- Recognize best practices for deploying Microsoft 365 applications, with a focus on optimizing the Teams app for a practice's unique needs.
- Select strategies from a step-by-step guide to implement Microsoft 365 for process documentation, client service improvement, and productivity enhancement

# John H. Higgins, CPA.CITP

## Strategic Technology Advisor



john@higginsadvisoryllc.com

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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!

# Presentation Outline

- Microsoft 365 Benefits For Your Practice
- The “Big Picture”
- Teams / SharePoint Deep Dive
- Top Initiatives to Implement
- Microsoft 365 Apps Lightning Round
- Copilot Preview
- Wrap-up
- Bonus Material

# MICROSOFT BENEFITS FOR YOUR PRACTICE



# Firm Benefits

Communication & Collaboration

Simplify tech stack

Minimize redundant data handling

Eliminate internal email

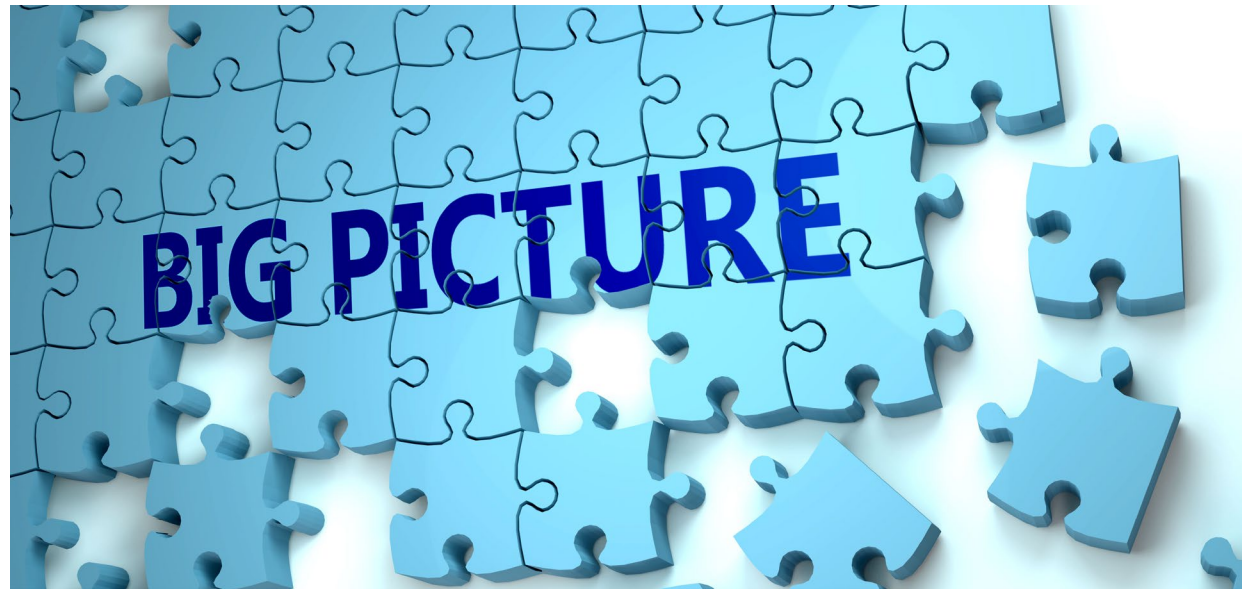
Reduce costs

Enhance data security and disaster recovery protection

# Firm Benefits (continued)

- Enable a hybrid work environment
- Improve process documentation
- Provide a knowledge sharing platform
- Improve meetings management and documentation
- Automate workflows
- Prepare your firm to leverage AI with Copilot

# THE “BIG PICTURE”





# Microsoft 365 Features



Over 25 integrated desktop, mobile and cloud-based applications



100% cloud-based infrastructure / data management / data security



Subscription based licensing model scales up and down

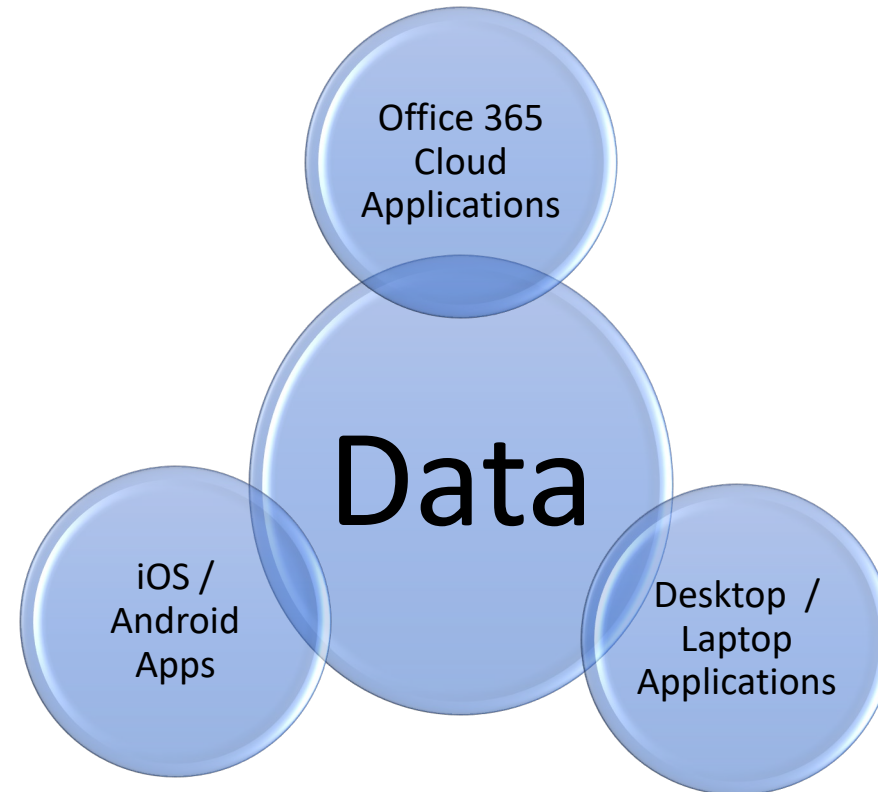


Perpetual upgrades / enhancements to access state of the art technology



AI powered with Microsoft 365 Copilot

# The Microsoft 365 Ecosystem



# Microsoft 365 Application Suite

Traditional Office  
Desktop Apps

Primary End User  
Apps

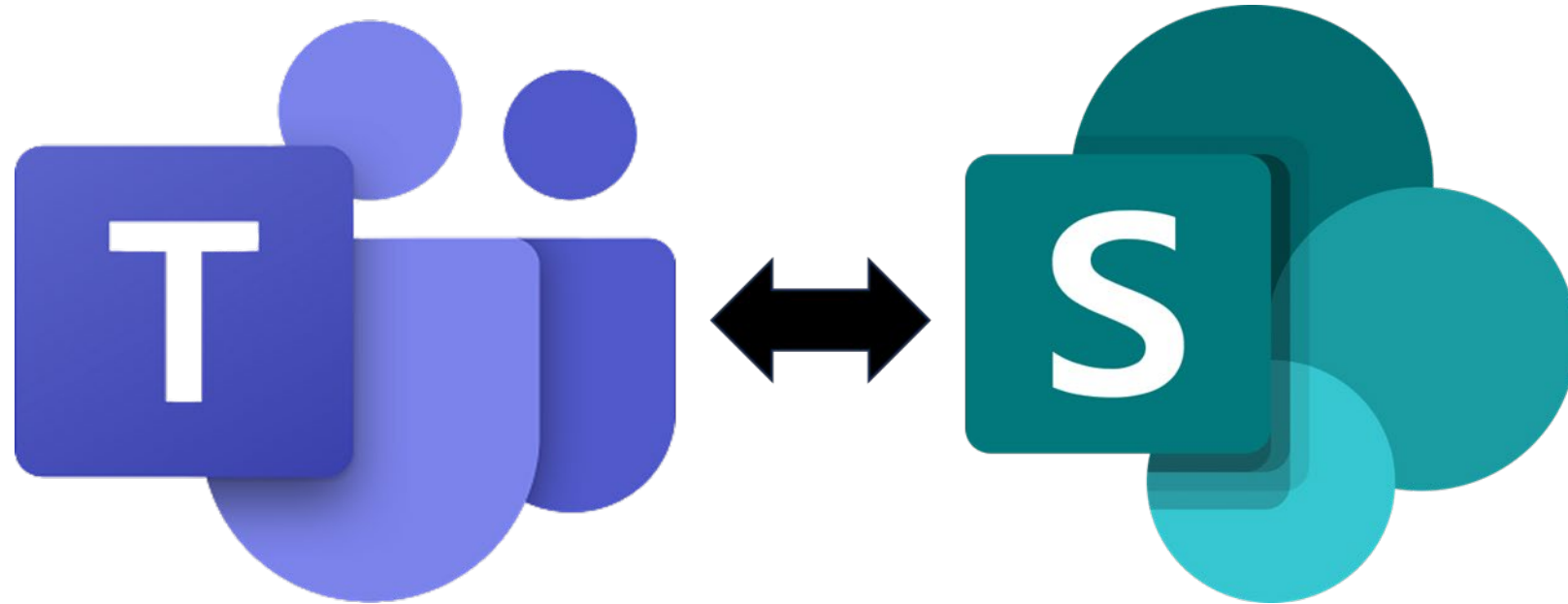
IT Technical Apps

- Admin
- Bookings
- Calendar
- Clipchamp
- Compliance
- Delve
- Excel
- Forms
- Insights
- Lists
- Loop
- OneDrive
- OneNote
- Outlook
- People
- Planner
- Power Apps
- Power Automate
- Power BI Pro
- PowerPoint
- Purview
- Security
- SharePoint
- Stream
- Sway
- Teams
- To-Do
- Viva Insights
- Whiteboard
- Word

AI Add-in



# TEAMS / SHAREPOINT DEEP DIVE



# Teams Role in the Microsoft 365 Ecosystem



Establish Teams as your hub  
for communications,  
collaboration and  
knowledge sharing

# Communication, Collaboration & Knowledge Sharing

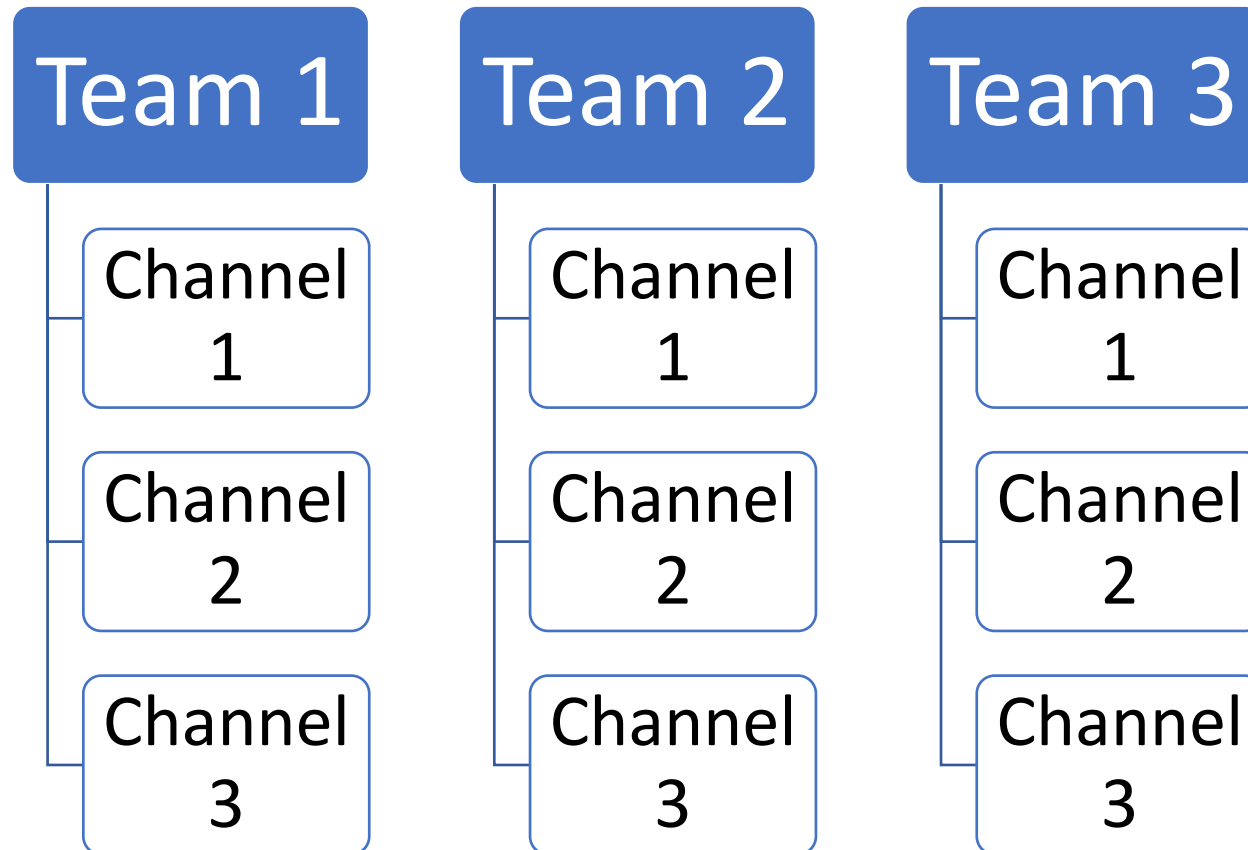
- ✓ Central repository for all your conversations
- ✓ Central hub for accessing all your files
- ✓ Launch pad to access all your apps
- ✓ Communications gateway to external parties
- ✓ Email replacement
- ✓ Optimize Microsoft 365 integration value

# Teams Features Review

- Teams & Channels
  - ✓ Posts (conversations)
  - ✓ Files (SharePoint)
  - ✓ Tabs (shortcuts)
- Chats
- Calendar / Meetings
- Calls

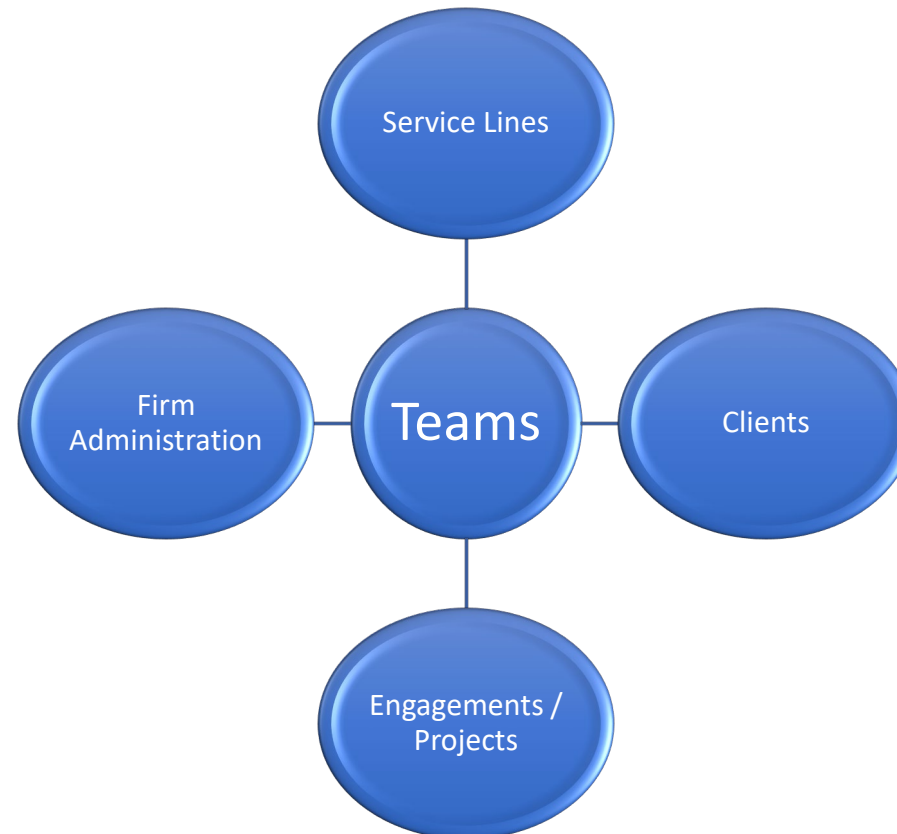


# Best Practices for Configuring Your Teams and Channels



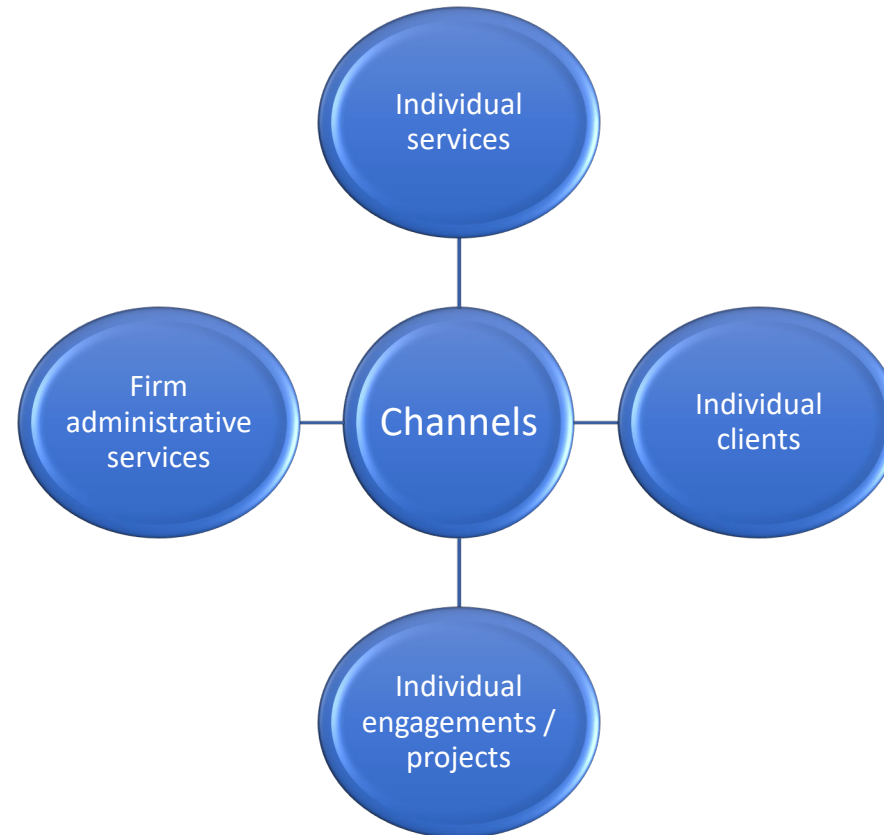
# Teams

Establish around activities where groups work together



# Channels

Subset of a team to organize your content in greater detail



# CPA Firm Example

| Team                | Channels     |                    |                     |                  |
|---------------------|--------------|--------------------|---------------------|------------------|
| Service Lines       | Audit        | Accounting         | Tax                 | Advisory         |
| Clients             | Client A     | Client B           | Client C            | Client D         |
| Firm Administration | HR           | Marketing          | Billing             | Governance       |
| Technology          | Tax Software | Audit Software     | Accounting Software | Infrastructure   |
| Vendors             | Vendor A     | Vendor B           | Vendor C            | Vendor D         |
| Human Resources     | HR Forms     | Personnel Policies | Fun Stuff           | HR Announcements |

# Teams & Channels Setup Best Practice Tips

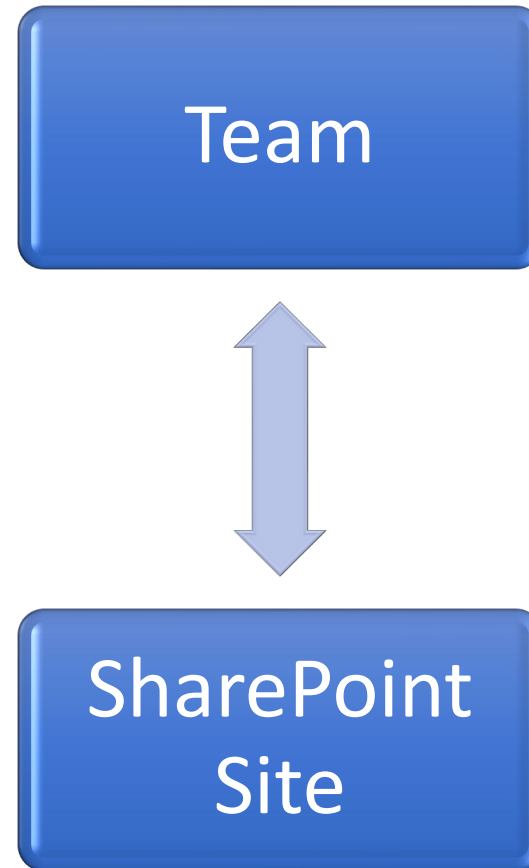
- ✓ Think of it like establishing a chart of accounts
- ✓ Take time to plan with participation from across the firm
- ✓ Document your plan before configuring
- ✓ Start broadly and evolve to narrower focus
- ✓ Get staff feedback early and often



# SharePoint Overview

- Cloud storage of files and other content for “shared” group access
- OneDrive is a SharePoint site for each user’s personal file storage
- 1 TB of storage provided with tenant subscription

# Teams / SharePoint Relationship



Search

### Teams

Activity  
Chat  
Teams  
Calendar  
Calls  
Files  
Apps

Your teams

- DT Demonstration Team  
General  
Accounting  
Human Resources  
Management Team  
Sales and Marketing
- BO Business Operations**  
General  
Contracts  
Facilities  
Financial  
Stock Photos and Images  
Technology
- BD Business Development

Join or create a team

... Welcome to the team!  
... e things to get going...

Create more channels

SharePoint

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Create site Create news post

### Following

- DT Demonstration Team - Management Team
- CA CPA Associations Group
- BO Business Operations - Financial
- C Curriculum Group
- BD Business Development Group
- BO Business Operations Group**



**Teams**

Activity

Chat

Teams

Calendar

Calls

Files

Apps

Your teams

- Curriculum** (highlighted with a red circle)
- Business Operations
- Business Development

General

- Adobe Tips for Working With PDFs
- ChatGPT What Every CPA Should Know
- Engagement Management With Planner ...
- Integrating ChatGPT Into Your CAS
- Microsoft 365 Apps Lightning Round Rev...
- Microsoft 365 Deployment Best Practices
- Outlook Must Know Email Tips
- Secure Your Data With Password Manag...
- Teams Deployment Best Practices
- Teams Features Every User Should Know
- Teams Virtual Meetings Online
- Using e-Signature Software
- Using Microsoft Forms

**SharePoint**

Search this library

**Curriculum** (circled in red)

+ New

Upload

Edit in grid view

Sync

Documents

In channels

In site library

- Adobe Tips for Working With PDFs
- ChatGPT What Every CPA Should Know
- Engagement Management With Planner App
- General
- Integrating ChatGPT Into Your CAS
- Microsoft 365 Apps Lightning Round Review
- Microsoft 365 Deployment Best Practices
- Outlook Must Know Email Tips
- Secure Your Data With Password Management App
- Teams Deployment Best Practices
- Teams Features Every User Should Know
- Teams Virtual Meetings Online
- Technology Trends Update
- Using e-Signature Software
- Using Microsoft Forms

Return to classic SharePoint

# Things to Know About Teams / SharePoint Integration

- Every team created establishes a corresponding SharePoint site
- Every channel created establishes a corresponding document folder in SharePoint
- Every private channel created establishes a separate SharePoint site for that channel
- **Warning – deleting a team deletes the corresponding SharePoint site and all its files, OneNote notebook, Planner plan, Power BI workspace and Stream group and all its files**

# USE PRIVATE CHANNELS FOR CONFIDENTIAL COMMUNICATIONS & FILE SHARING






# Private Channel Features

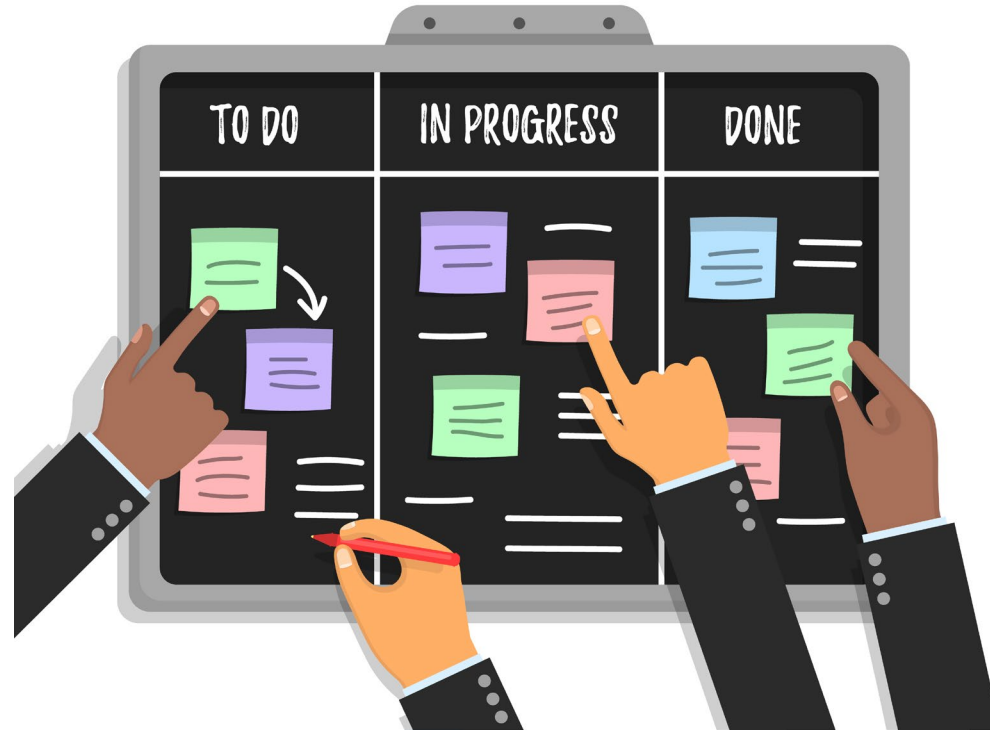
- Accessible by subset of Team members
- Not viewable beyond private channel members
- Creates a separate SharePoint site

# Private Channel Example

Private channel viewable and accessible only by designated subset of team members

- ▼ Your teams
  - ▼ **FA** Firm Administration (Demo)
    - General
    - Billing and Collections
    - Executive Committee 
    - Expense Management
    - Partner Matters 
    - Personnel Matters 

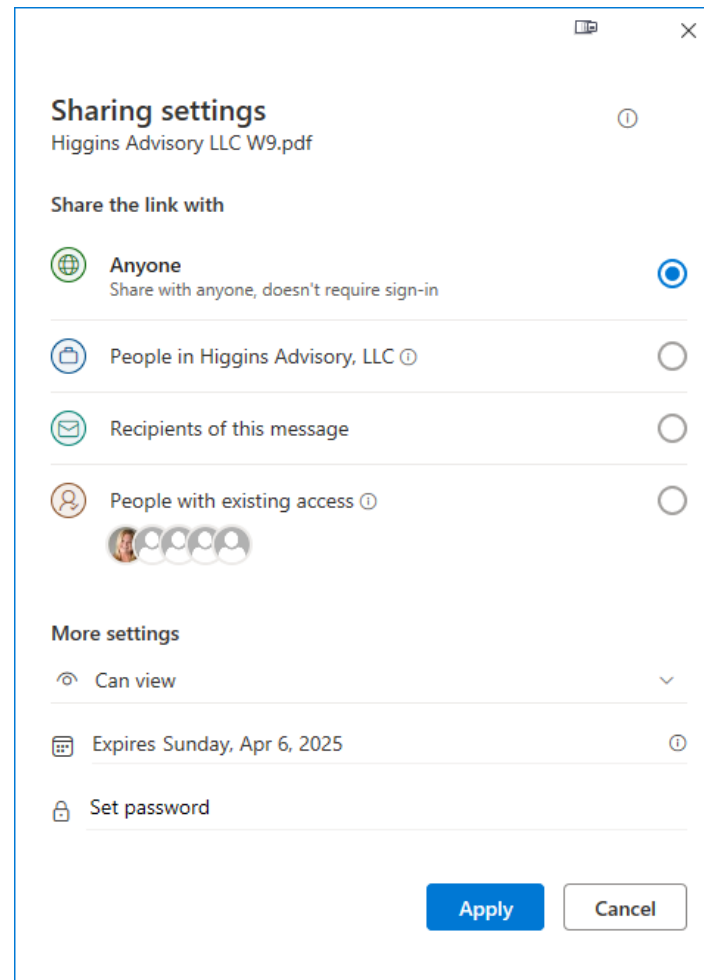
# TOP INITIATIVES TO IMPLEMENT



# Eliminate Email File Attachments

The screenshot displays the Microsoft Word interface for composing an email. The ribbon includes menus for File, Message, Insert, Draw, Options, Format Text, Review, and Help. The ribbon tabs include Clipboard, Basic Text, Names, Include, Adobe Acrobat, Collaborate, Tags, and Voice. The email header shows the 'From' field with 'john@higginsadvisoryllc.com'. A dialog box titled 'How do you want to attach this file?' is open, offering two options: '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.' To the right, a sharing options menu is visible for the file 'Higgins Advisory LLC W9.pdf', showing '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: 248-390-9754 and higginsadvisoryllc.com.

# Eliminate Email File Attachments (continued)





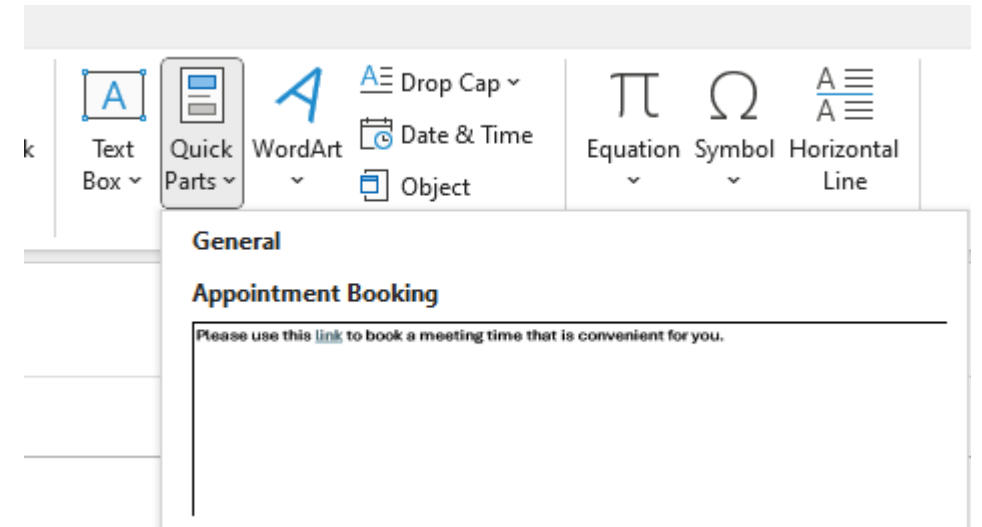
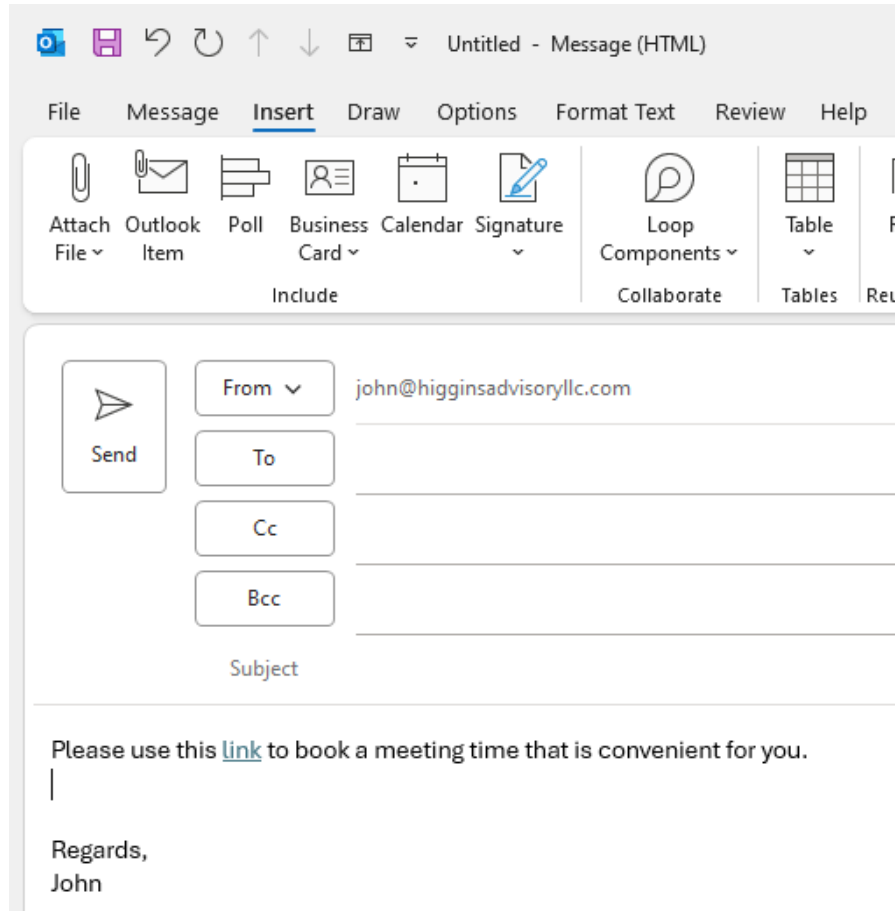
# Eliminate Internal Emails

The screenshot displays an Outlook email client interface. The main window shows an email titled "2024 First Quarter Evaluation Report" from Sydney Pielak to John Higgins. The email content includes a greeting, a brief description of the report, and contact information for Sydney Pielak. An attachment titled "HA Webinar Evaluation Results 010124-033124.xlsx" is visible. A "Share to Microsoft Teams" dialog box is overlaid on the right side of the email, showing search results for "Demo". The results include a person named "John Doe (DEMO) CFO" and a channel named "General Demonstration Team". The "Include attachments" checkbox is checked, and a "Share" button is at the bottom right of the dialog.

# Eliminate Internal Emails (continued)

The screenshot shows a Microsoft Teams interface. On the left is a sidebar with navigation options: Activity, Chat, Teams, Calendar, Calls, OneDrive, Bookings, and Apps. The 'Teams' section is expanded to show 'Your teams', including 'Demonstration Team' with a 'General' channel selected. The main chat area shows a message from John Higgins at 4:09 PM. The message content is a forwarded email from Sydney Pielak (spielak@cpacrossings.com) to John Higgins, dated Thursday, April 4, 2024, at 10:16 AM. The email text reads: 'Hi John, We've created your 2024 first quarter evaluation report, which includes completed survey results for your courses. This is valuable feedback you can use to help you develop your courses moving forward. Please reply to me if you have any questions. Best regards, Sydney Pielak | Webinar Moderator CPA Crossings, LLC | (248) 963-0637 Connect with us: CPACrossings.com | LinkedIn | Twitter'. Below the text is an Excel spreadsheet attachment titled 'HA Webinar Evaluation Results 010124-033124.xlsx'. At the bottom of the chat window, a text input field contains the message 'Marcia Sheehy - 1st Q Evaluations for your review'.

# Implement Bookings App with Quick Parts



# Implement Bookings App (continued)

The screenshot shows a booking interface for John Higgins. At the top, it says "Bookings with me" and "My Bookings page". Below this is a header with a profile picture of John Higgins and his name. The main section is titled "Choose a meeting type" and offers two options: "60 Minute Meeting" (1 HR, Appointment for up to 1 hour meeting) and "30 Minute Meeting" (30 MIN, Appointment for a 30-minute meeting). Below the meeting types, there is a section for "Available times" with a toggle for "You are available". A calendar for April 2024 is shown, with the 6th of April selected. To the right of the calendar, the date "Monday, April 08" is displayed, and a time slot for "11:30 AM" is available, indicated by a green checkmark.

# Establish Client Portal Model

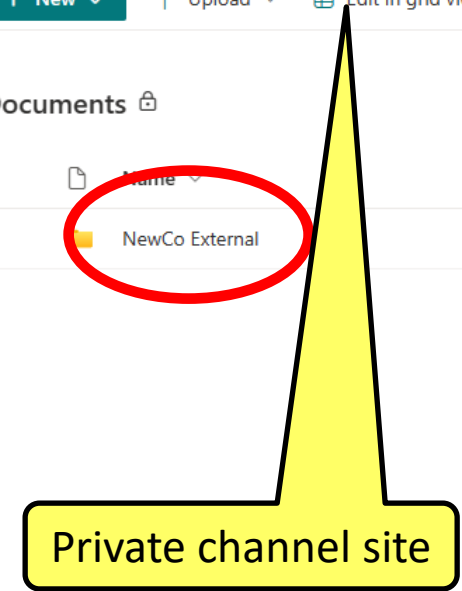
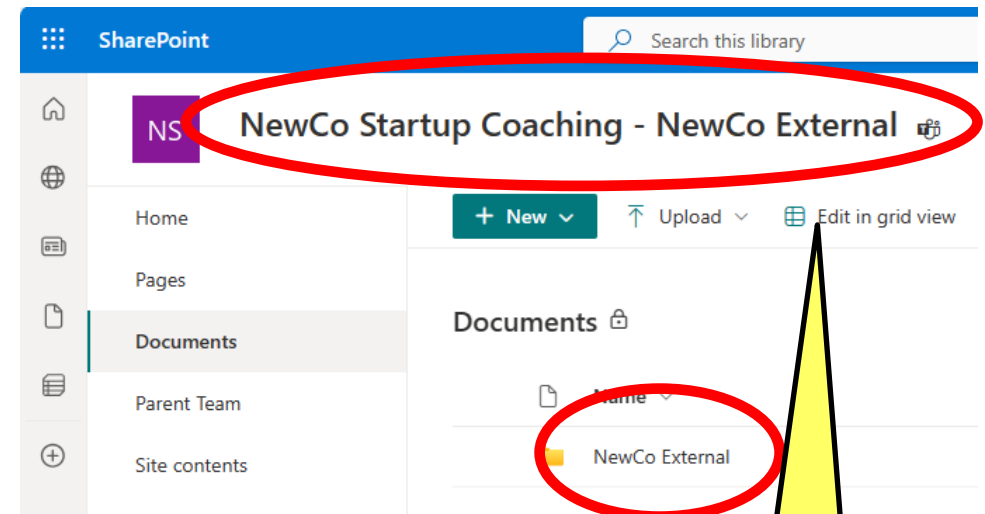
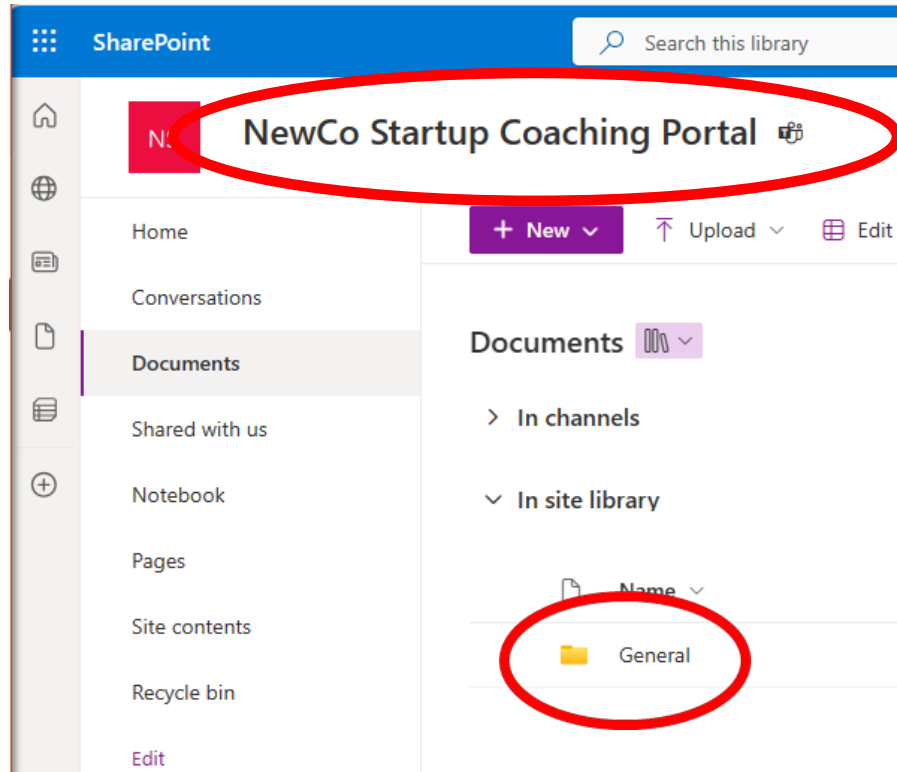


# Establish Client Portal Model (continued)

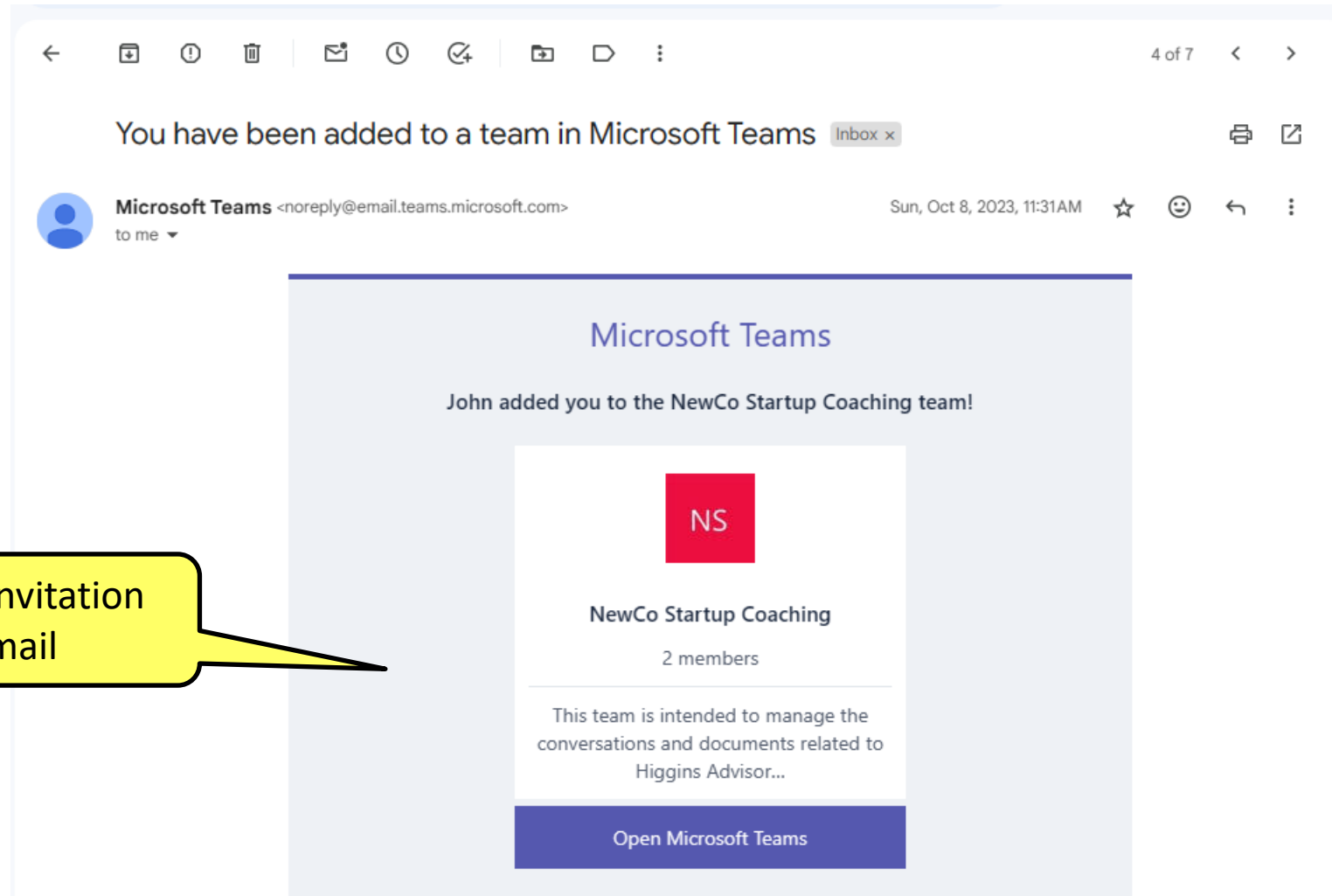
Firm view

The screenshot displays a Microsoft Teams interface. On the left, the 'Teams' sidebar lists various teams, with 'NewCo Startup Coaching Portal' selected. The main area shows a channel named 'NewCo External'. The channel content includes a welcome message from John Higgins dated 10/8/2023 9:58 AM, followed by a reply from Nicole Doe dated 10/8/2023 9:59 AM. A subsequent message from John Higgins dated 10/8/2023 10:01 AM provides a link to schedule a meeting. A notification card from 'Higgins Advisory, LLC' is visible, stating 'You can now book and manage appointments using our booking page.' Below this, another message from John Higgins dated 10/8/2023 11:55 AM shares a 'Financial Analysis Sample' file named 'Financial Sample.xlsx'.

# Establish Client Portal Model (continued)



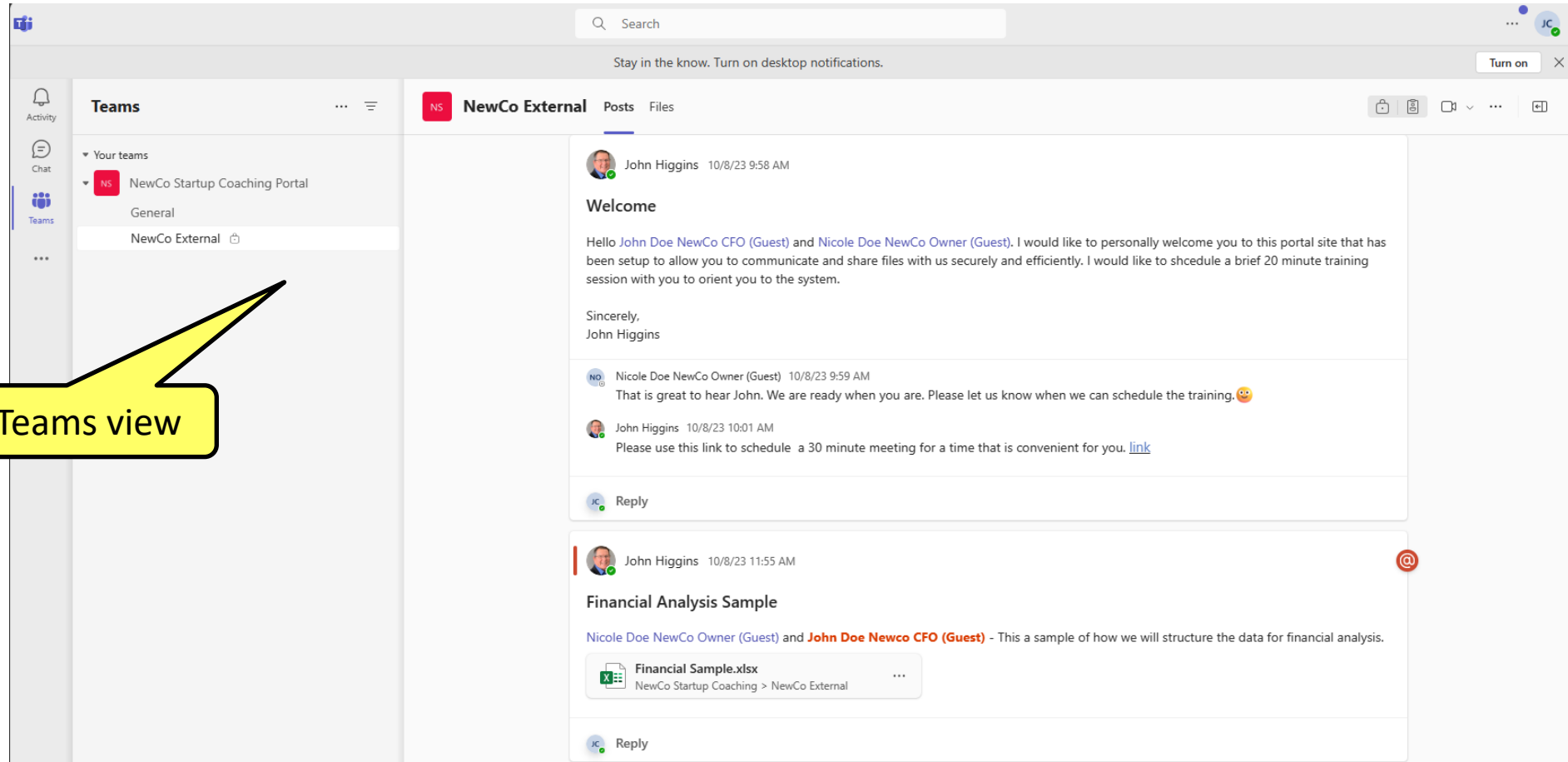
# Establish Client Portal Model (continued)



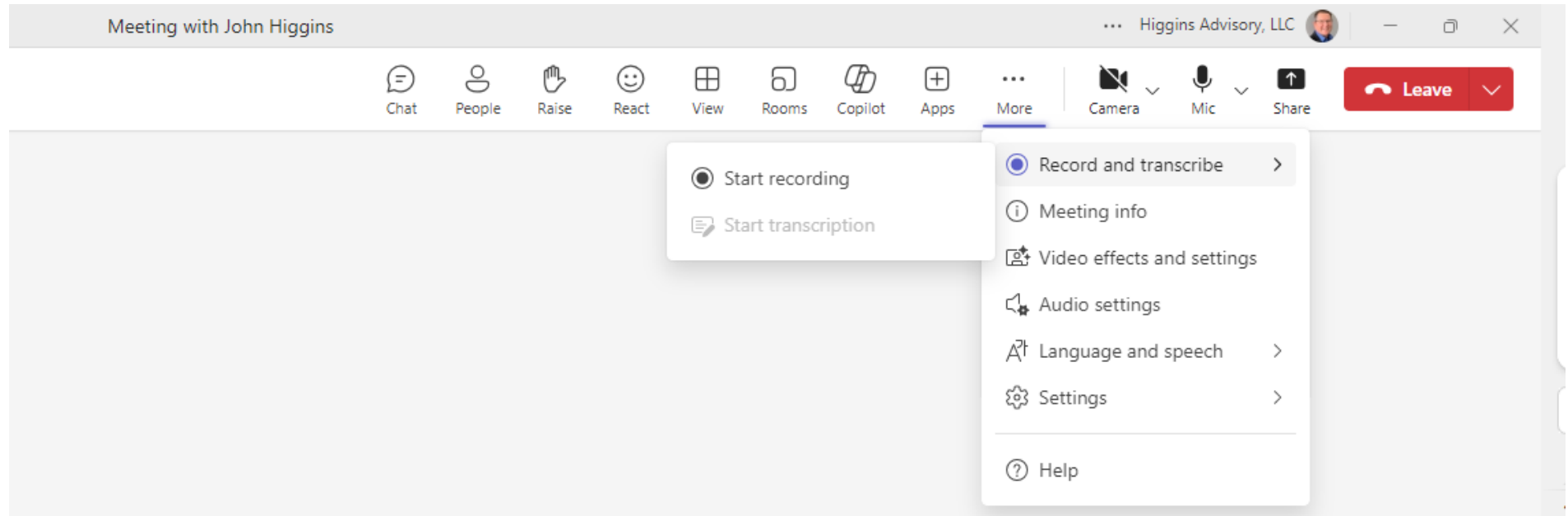
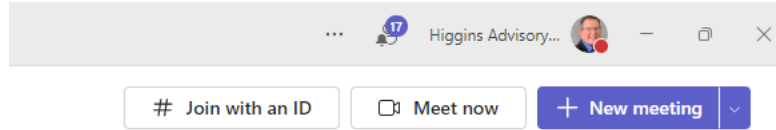
Client invitation email



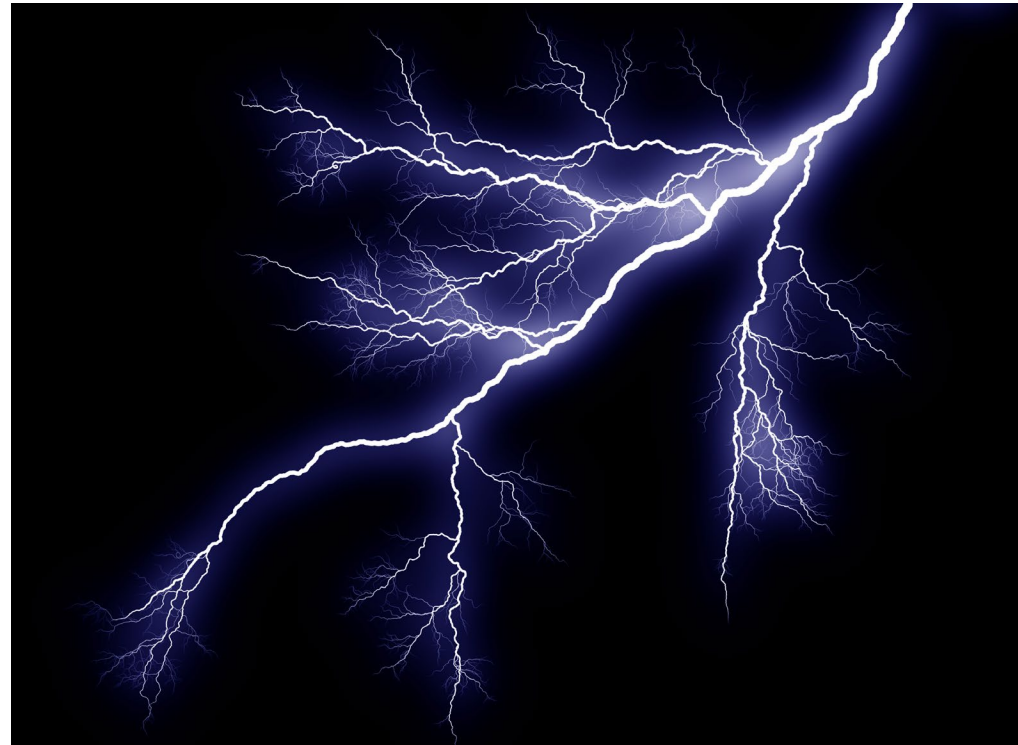
# Establish Client Portal Model (continued)



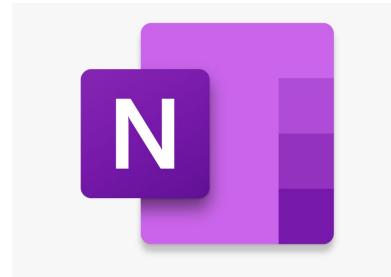
# Document Meetings With Teams



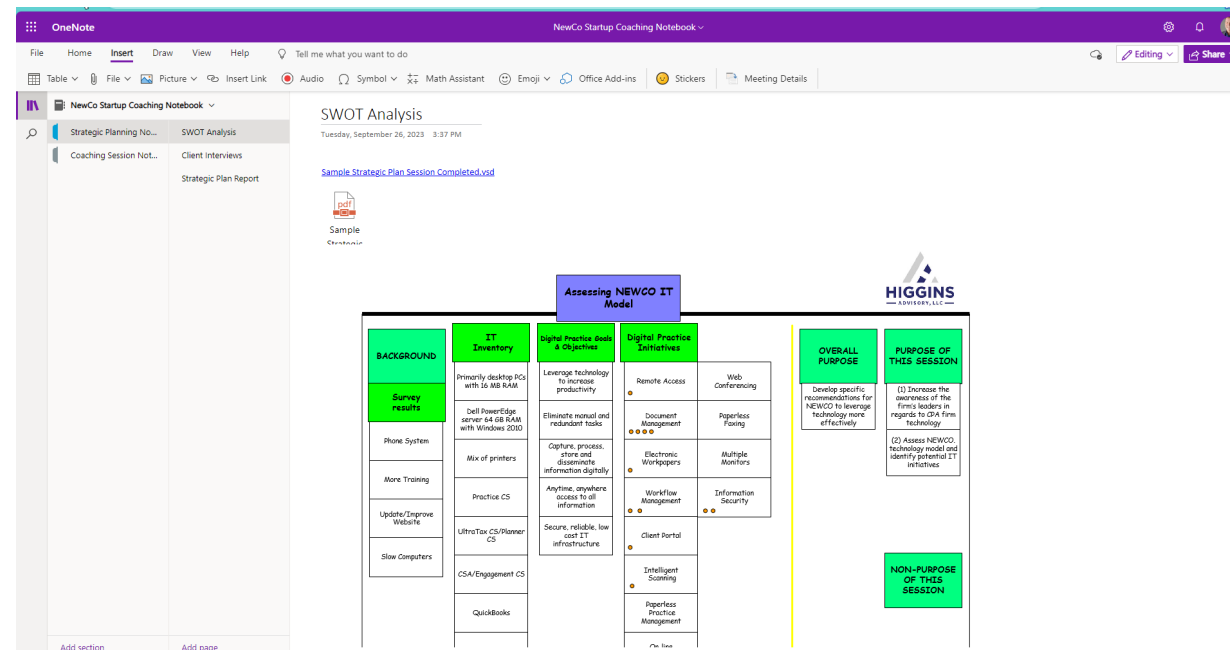
# MICROSOFT 365 APPS LIGHTNING ROUND



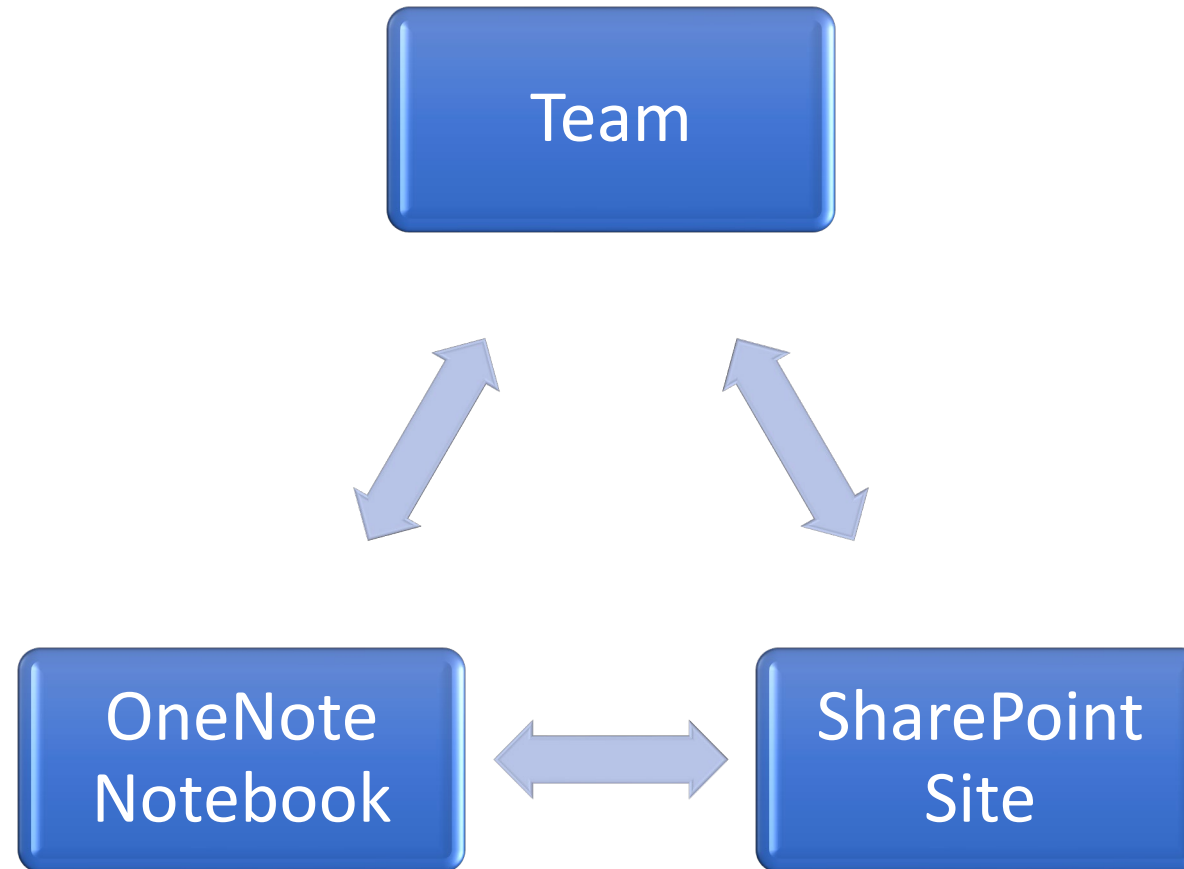
# OneNote



- Dedicated notebook repository for all your notes, correspondence and misc. content



# Teams / OneNote Relationship





# OneNote App Things to Know

Supports multiple content formats

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

Dictate option

One to one Teams / SharePoint / Notebook

Shared access to notebooks

Custom note page templates

# Planner



## Manage engagements / projects from start to finish

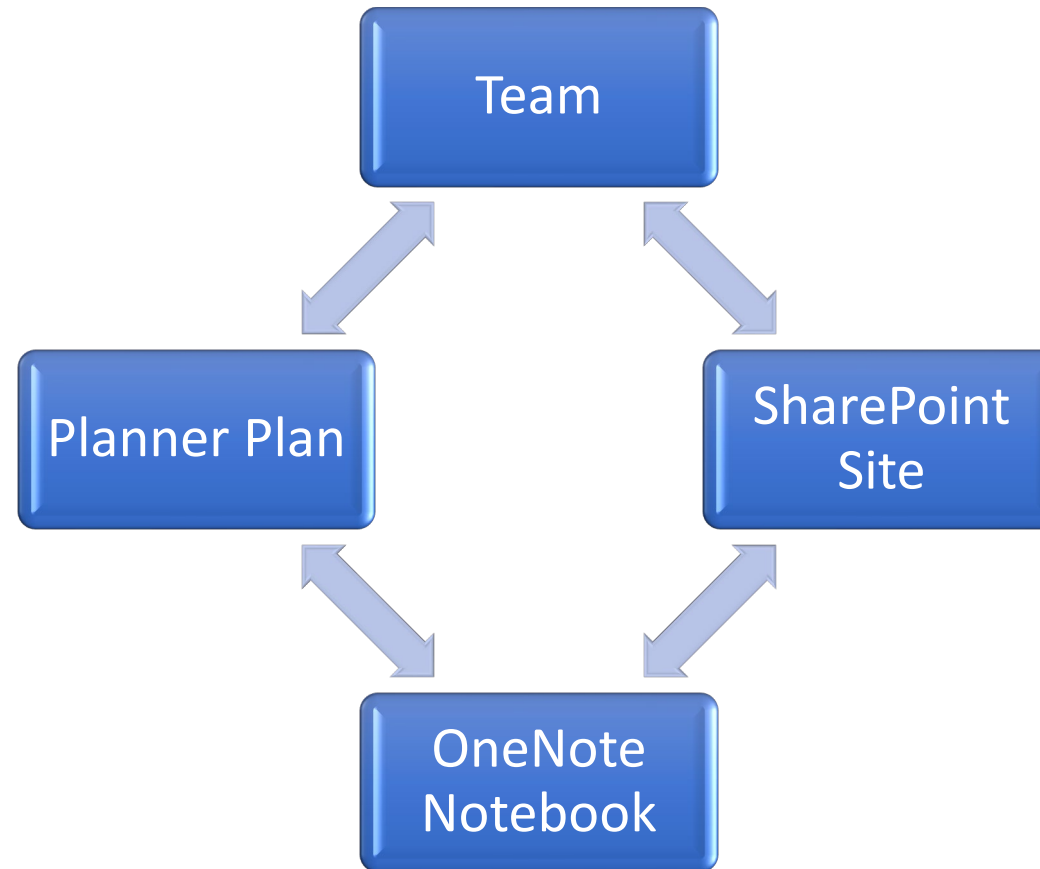
The screenshot displays the Microsoft Planner application interface. At the top, the title bar shows 'Planner' and navigation icons. Below this, the main header includes the project name 'Chat, teams, channels and apps' with a 'Dt' icon and 'Deployment team' label. Navigation tabs for 'Grid', 'Board', 'Charts', and 'Schedule' are visible, with 'Board' selected. User information for 'John Higgins' and options for 'Members', 'Filter (0)', and 'Group by Bucket' are also present.

The main workspace is organized into five columns, each with an 'Add task' button:

- Set up this planner:** Contains one task, 'Project kickoff', under the 'Project management' category. The task description mentions reading an introduction and holding a kickoff meeting. Progress is shown as 0/6.
- Get ready:** Contains two tasks. The first is 'Learn about deploying Teams' (Project management) with a description about reviewing a 'How to roll out Teams' article. Progress is 0/3. The second is 'Define usage scenarios' (Project management and Adoption) with a description about using Microsoft Teams to address business challenges. Progress is 0/6.
- Roll out to early adopters:** Contains two tasks. The first is 'Implement your adoption plan' (Project management and Adoption) with a description about creating an adoption plan. Progress is 0/1. The second is 'Roll out Teams to pilot users' (Project management and Configuration) with a description about creating teams and channels for early adopters. Progress is 0/4.
- Org-wide rollout:** Contains two tasks. The first is 'Update your adoption plan as needed' (Adoption) with a description about updating the plan based on pilot feedback. Progress is 0/1. The second is 'Roll out chat, teams, channels, and apps to the next group of users' (Adoption) with a description about repeating the rollout process. Progress is 0/1.
- Add new bucket:** This column is currently empty.

At the bottom left, there is a 'Pinned' section with two items: 'Chat, teams, channels and apps' and 'Tax Engagement Demonstration'. The bottom right corner of the interface shows a user profile icon and the number '47'.

# Teams / Planner Relationship



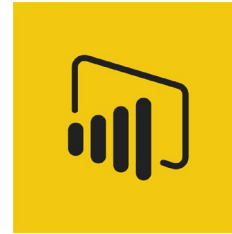




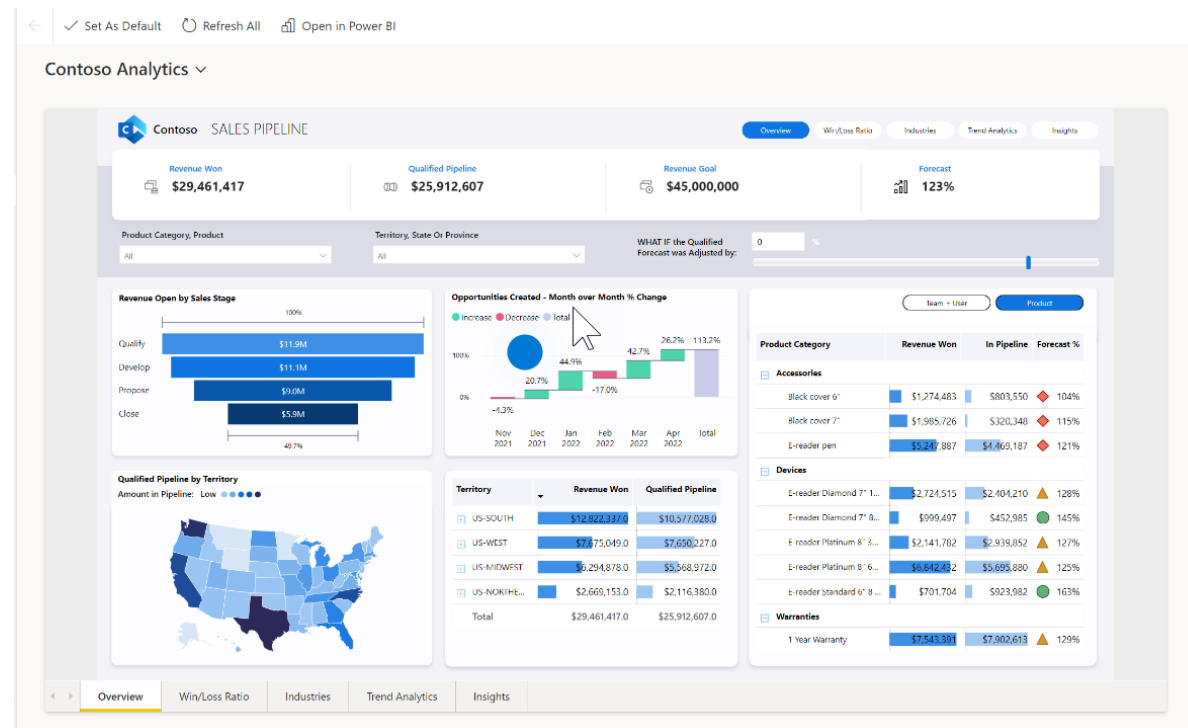
# Planner App Things to Know

- Plan / Buckets / Tasks
- Track milestones, task assignments, due dates
- Maintains task level activity tracking journal
- Visual project status reporting
- Assign tasks to external users
- Plan and task level templates

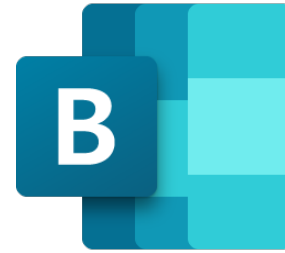
# Power BI



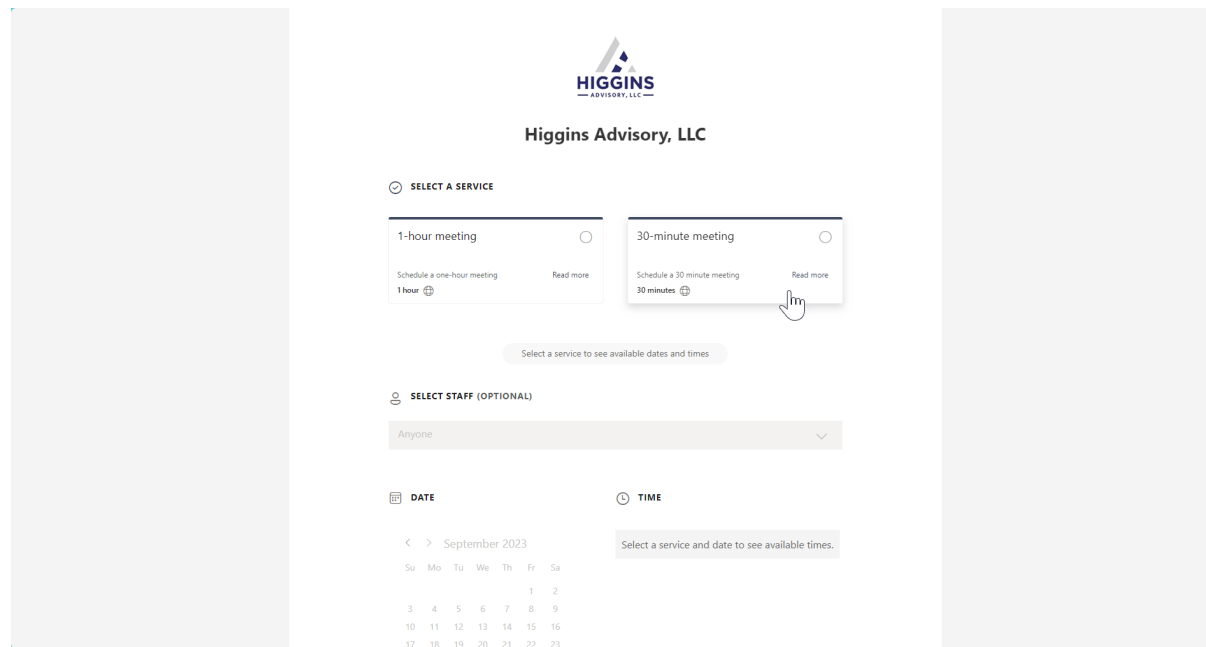
- Create interactive visual dashboard reports to analyze data in real time

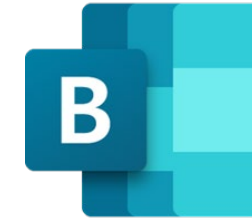


# Bookings



- Streamline appointment scheduling





# Bookings App Things to Know

- Streamline meeting scheduling
- Direct integration with Outlook & Teams
- Create custom booking page website
- Define meeting / service types
- Individual or team bookings page

# Lists



## Create and manage customized lists

The screenshot displays the Microsoft Lists interface. At the top, there is a purple header bar with the text 'Microsoft Lists' and a search box labeled 'Search this list'. Below the header, there is a navigation bar with options: '+ New', 'Edit in grid view', 'Share', 'Export', 'Automate', 'Integrate', and a menu icon. On the right side of the navigation bar, there are icons for 'All Items', a filter, and a refresh icon. The main content area shows a list titled 'Higgins Advisory, LLC Expense Tracker' under the heading 'My lists'. The list has the following columns: Item, Date, Amount, Category, Description, Receipt, and Created By. A single item is listed: 'Postage stamps' with a date of 'Today', an amount of '\$15.00', a category of 'Postage', a description of '20 Forever stamps', and a creator of 'John Higgins'.

| Item           | Date  | Amount  | Category | Description       | Receipt | Created By   | + Add column |
|----------------|-------|---------|----------|-------------------|---------|--------------|--------------|
| Postage stamps | Today | \$15.00 | Postage  | 20 Forever stamps |         | John Higgins |              |

# Forms



## Gather data from clients, customer, employees

The screenshot displays the 'Customer Voice' software interface. The top navigation bar includes 'Customer Voice', 'Saved', and user profile options. A left sidebar menu lists 'Home', 'All projects', 'Periodic customer feedback', 'Surveys', 'Periodic customer ...', 'New survey', 'Reports', 'Alerts', 'Satisfaction metrics', and 'Periodic customer survey'. The main content area shows a 'Periodic customer survey' form with 'Design' and 'Send' tabs. The survey content includes a blue header 'Periodic customer feedback', a question about overall satisfaction with a star rating scale, and a section for rating statements based on experience over the last three months. The statements and their corresponding rating scales are:

|  | Strongly disagree     | Disagree              | Neutral               | Agree                 | Strongly agree        | Does not apply        |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 1. How would you rate your overall satisfaction with our company?<br>Dissatisfied ☆☆☆☆ Satisfied                                     |                       |                       |                       |                       |                       |                       |
| 2. Based on your experience with our company in the last three months, please rate how much you agree with the following statements: |                       |                       |                       |                       |                       |                       |
| I've been satisfied with the way support responded to my cases.  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| It is easy to conduct business with {{companyname}}.   | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I have all the resources and information I need (website, customer support, social media)  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

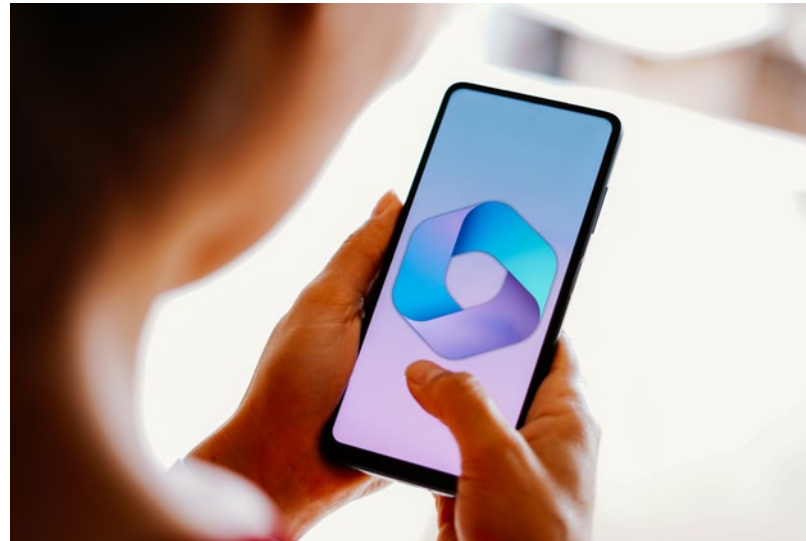


# Whiteboard

- Facilitate brainstorming sessions

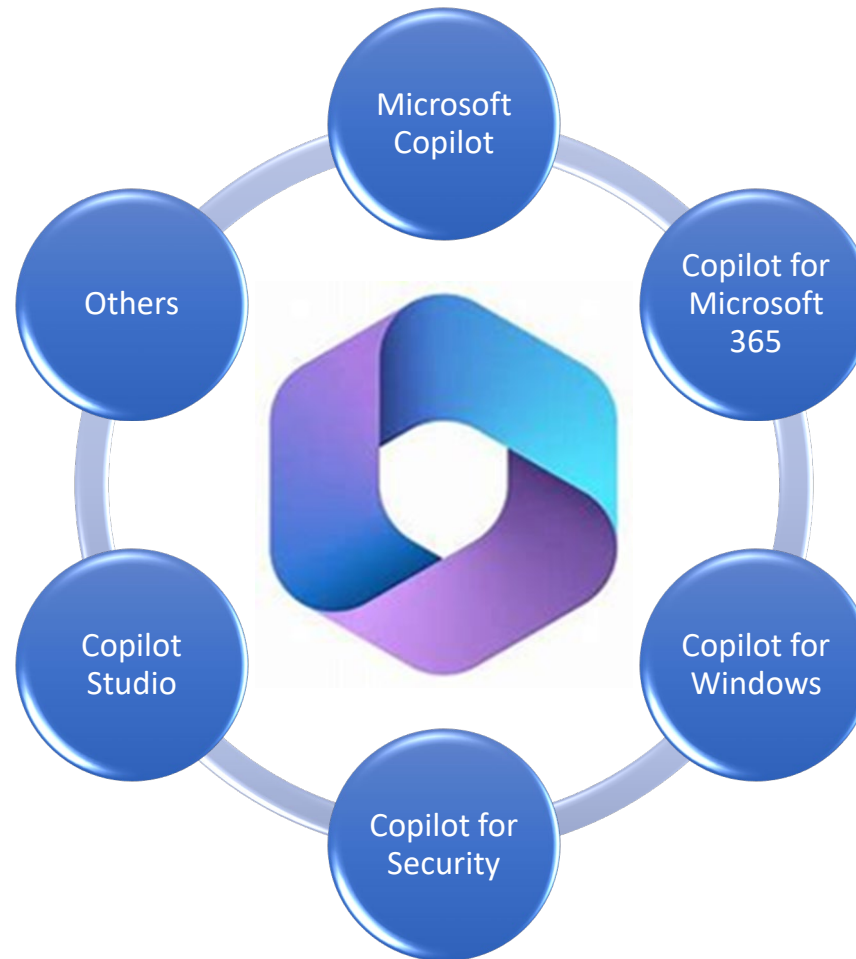
The screenshot shows a digital whiteboard application titled "Whiteboard". The main content area is titled "NEWCO S.W.O.T. Brainstorming". It features five columns: "Weakness" (orange), "Opportunities" (green), "Threats" (pink), and "Parking Lot" (blue). Each column contains a 4x4 grid of colored cells. A hand cursor is positioned over one of the cells in the "Threats" column. The interface includes a top navigation bar with "Whiteboard", "Follow me", and "Share" buttons. A tooltip in the top right corner asks, "How likely are you to recommend Whiteboard to a friend or colleague?". Below the main content, there is a toolbar with various editing tools like eraser, highlighter, and text, and a bottom status bar with navigation and zoom controls.

# COPILOT PREVIEW



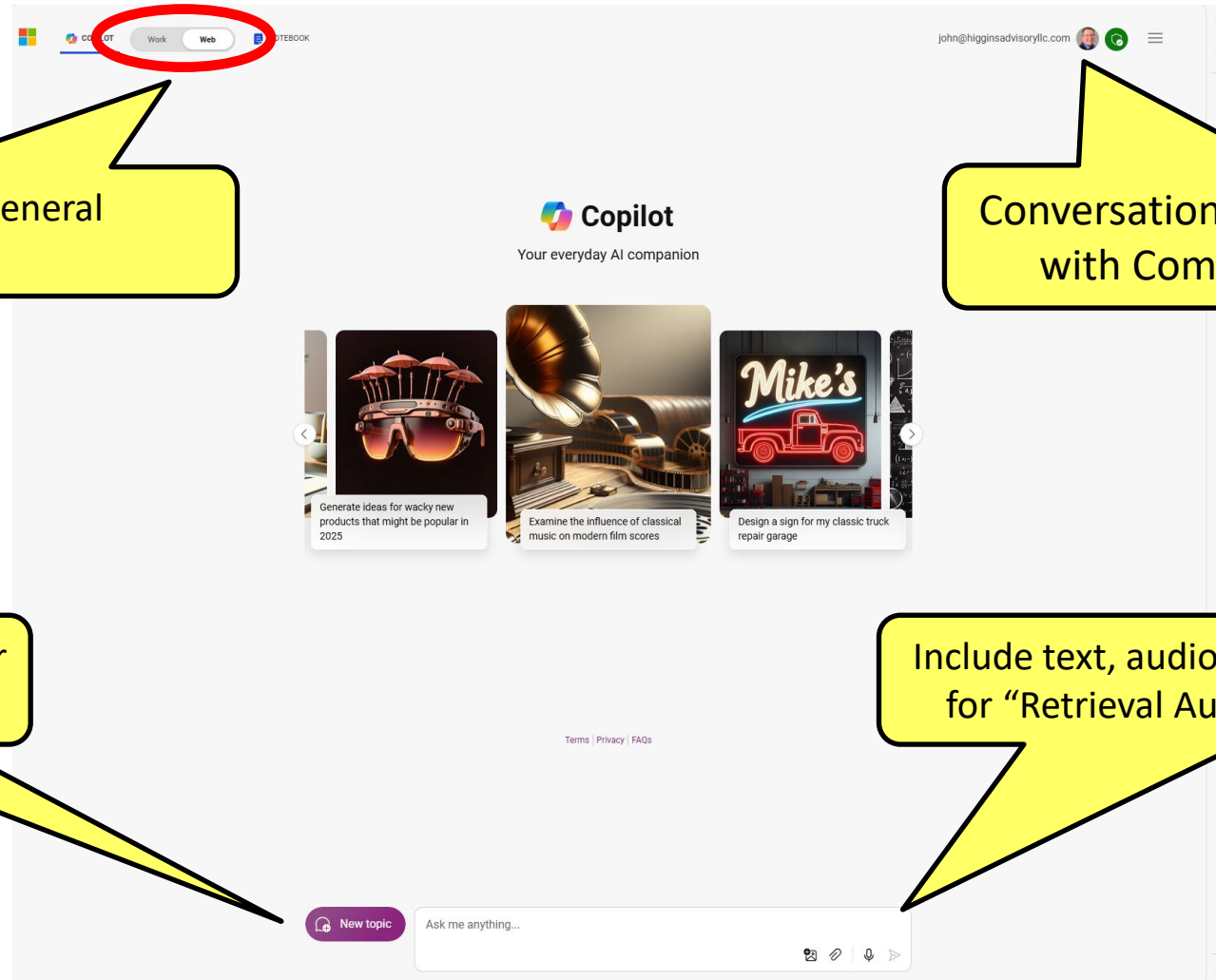


# Microsoft Copilot Apps





# Copilot Prompt Screen - Web



“Web” is free and is used for general prompting / chatting

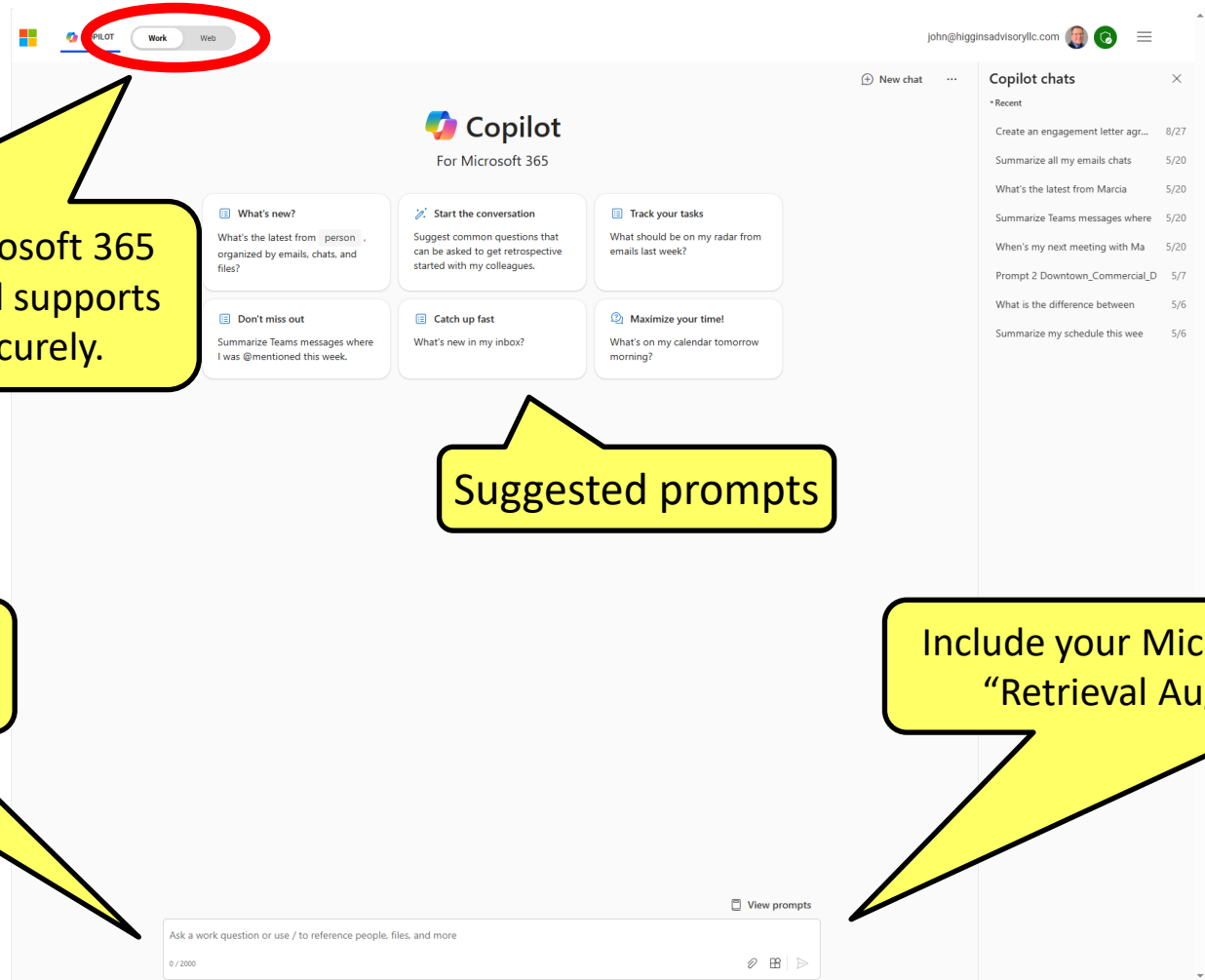
Conversations and data are kept private with Commercial Data Protection

Prompt data is not saved or used for LLM training

Include text, audio, images and files with prompt for “Retrieval Augmented Generation” (RAG)



# Copilot Prompt Screen - Work



“Work” requires Copilot for Microsoft 365 subscription (\$30 per month) and supports prompting your company data securely.

Chat conversations are retained

Suggested prompts

Prompt data is not used for LLM training

Include your Microsoft 365 data with prompt for “Retrieval Augmented Generation” (RAG)

# Copilot for Microsoft 365



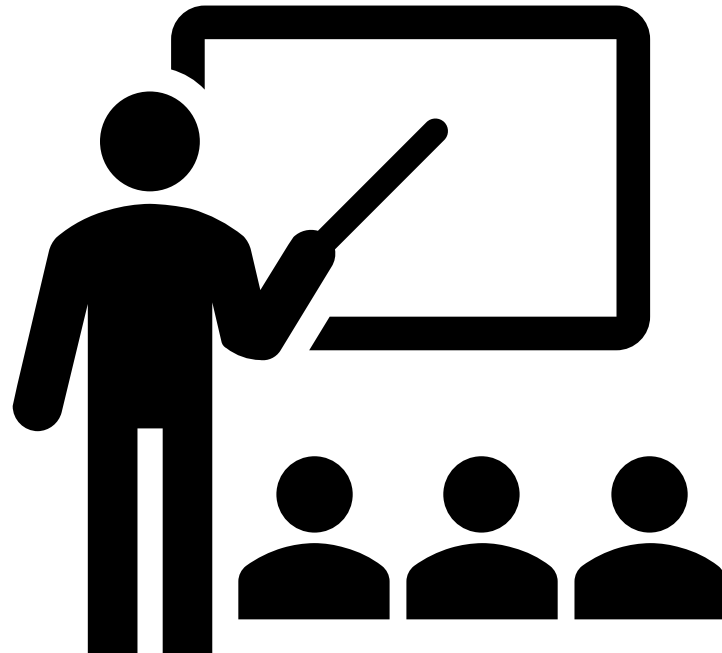
# Preparing Your Organization for Copilot

- Get your Microsoft 365 data governance managed
- Store files in SharePoint and OneDrive
- Use Teams & Channels vs. Chats
- Use Teams Meetings vs. Zoom
- Educate your staff on Generative AI & Copilot

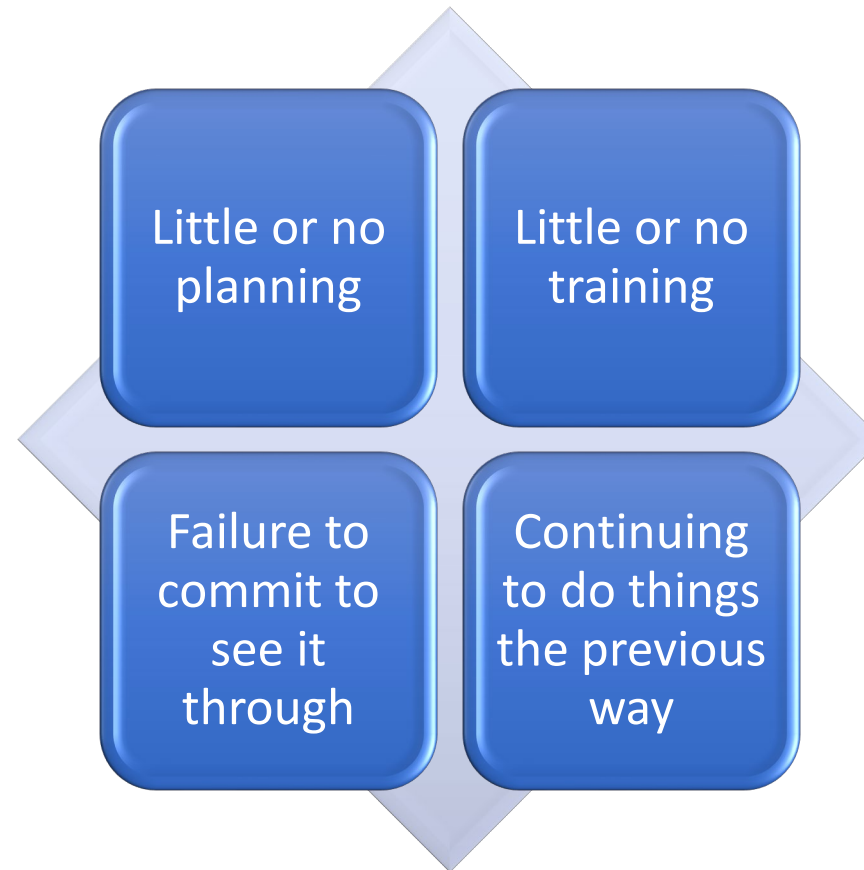
# Copilot Licensing

- \$30 per user, per month
- Requires Microsoft 365 Enterprise or Business subscription
- Can be procured on a user by user basis

# WRAP-UP



# Common Deployment Failures





# In Summary

- There is an abundance of opportunity to increase productivity with Microsoft 365
- Focus on Teams and SharePoint as the foundation
- A little planning and training goes a long way
- Don't try to do too much!
- Don't do too little!
- Enjoy the journey!

# Questions ?



# Thank you!!!

# Bonus Material



# TEAMS & SHAREPOINT DEPLOYMENT BEST PRACTICE TIPS



# Establish a Teams Champion



Responsible for overseeing deployment of Teams from the “user” perspective



Deep dive learning about all aspects of Teams



Facilitate Teams deployment planning, including policy settings



Research and organize user training

# Teams Deployment Best Practice Tips

- Designate gatekeeper(s) for new team creation
- Establish policy for when to use teams vs. chat
- Commit to using SharePoint with Teams
- Build all SharePoint sites via Teams
- Limit SharePoint document library root folders to team channels
- Leverage channel tabs to “pin” files & apps

# Teams Deployment Best Practice Tips (continued)

- Leverage channel tabs to “pin” files & apps
- Establish goal to eliminate / minimize internal email communications
- Avoid using third party apps during initial rollout
- Avoid changing team and channel names due to SharePoint integration
- Provide Teams application and usage training



# TEAMS ADMIN SETTINGS REVIEW



Admin

# Teams Admin Center Home Page

The screenshot displays the Microsoft Teams Admin Center home page. The top navigation bar includes the Microsoft Teams admin center logo, a search bar, and user profile icons. The left-hand navigation menu lists various administrative sections: Dashboard, Teams, Users, Teams devices, Teams apps, Meetings, Messaging, Voice, Locations, Frontline deployment, Enhanced encryption, Policy packages, Planning, Analytics & reports, and Notifications & alerts. The main content area is divided into several sections: an announcement about Teams certified devices, a 'Review user app requests' section showing 'No app requests', a 'Deployment task status' donut chart, and a 'Release notes' section. Below these are sections for 'Training', 'Self-help diagnostics', and 'Activity log'. At the bottom, there are 'Organization details' for Higgins Advisory, LLC (created Jan 29, 2023, United States) and a 'User search' bar.

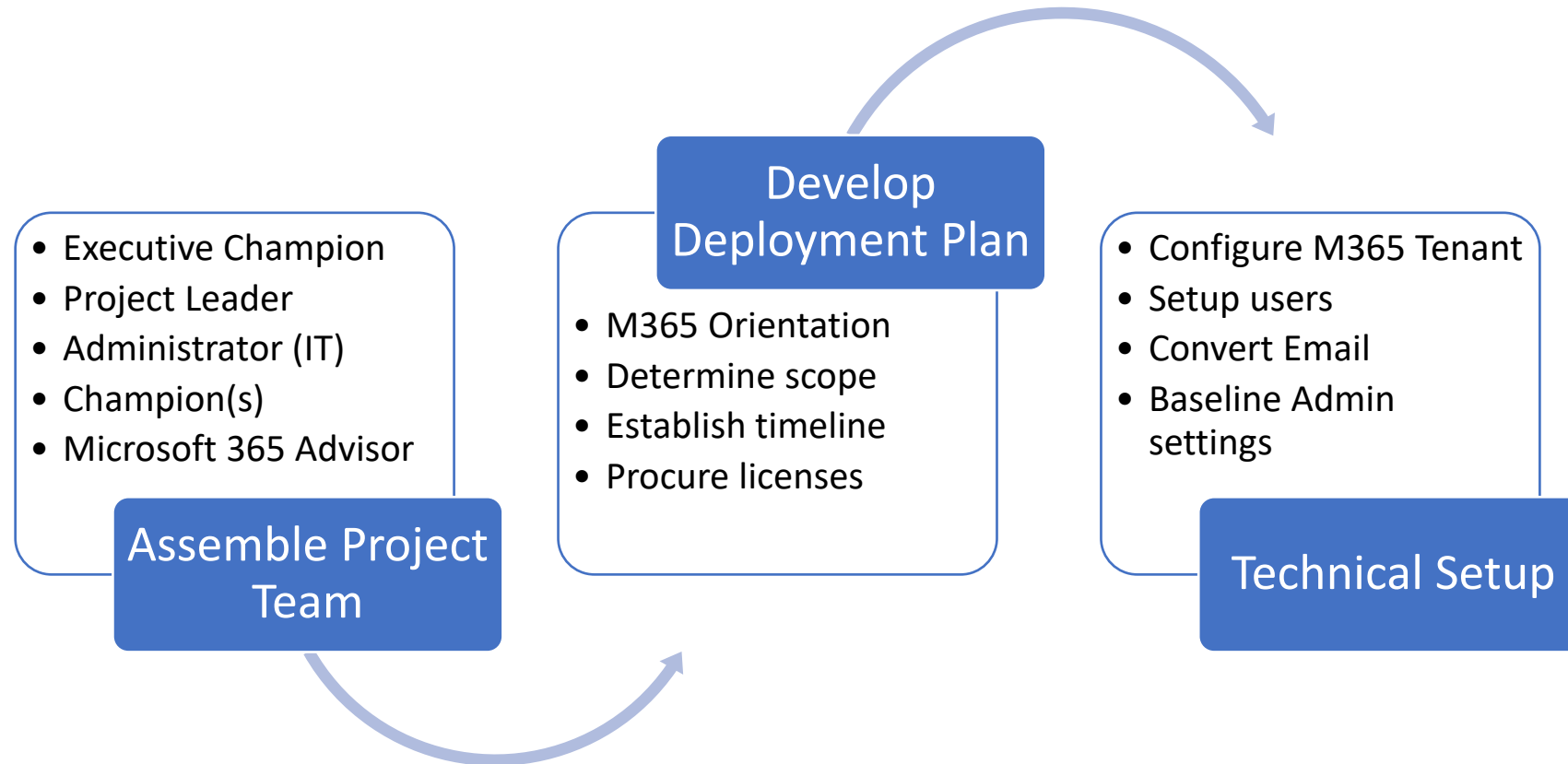
# Key Teams Admin Settings

- Team settings
- Team policies
- Apps
- Meetings
- Planning
- Analytics & Reports

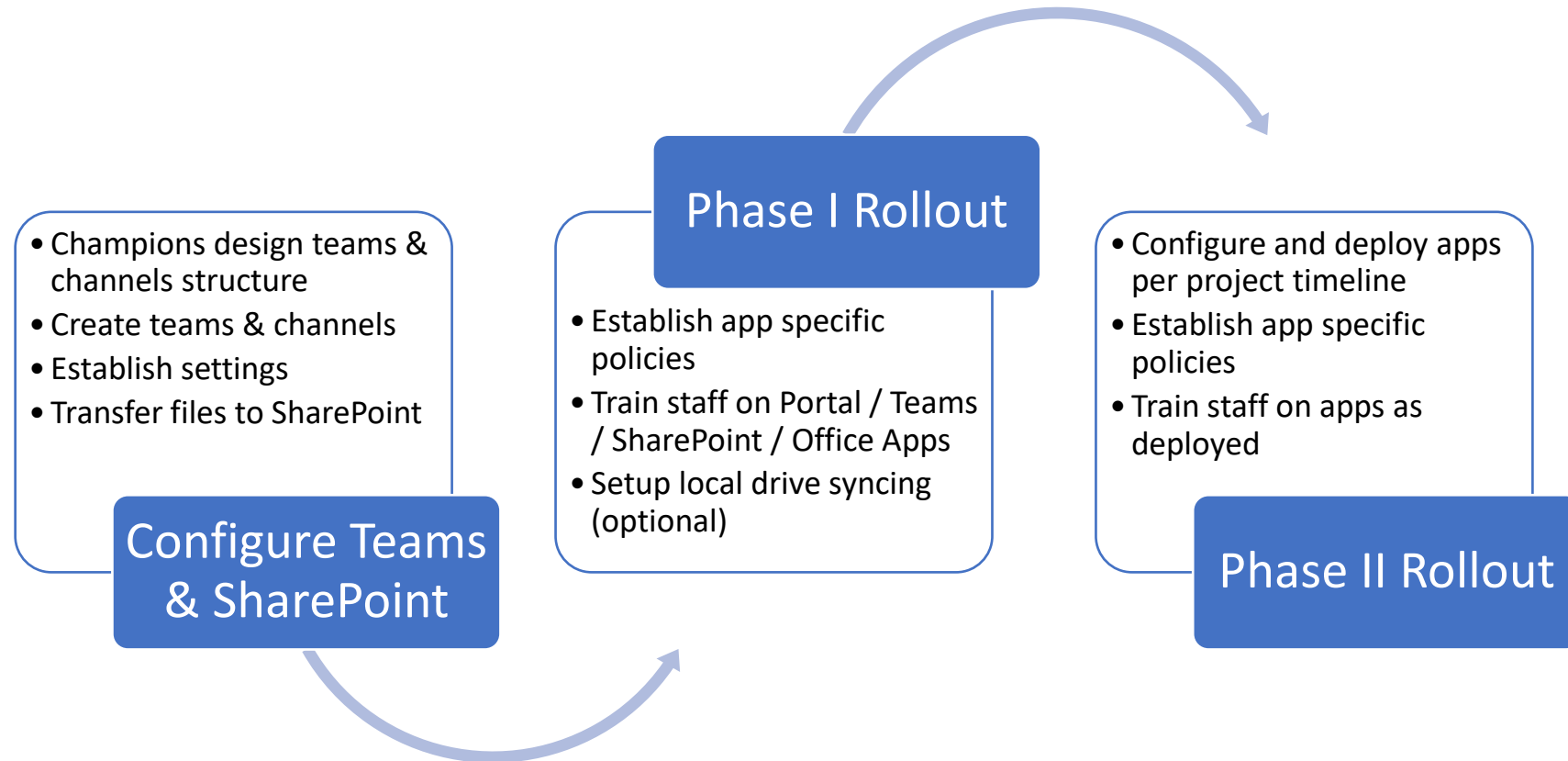
# STEP-BY-STEP ROADMAP FOR AN OPTIMAL DEPLOYMENT



# Deployment Roadmap



# Deployment Roadmap (continued)



# M365 Deployment Task Force Best Practices

|                                     |   |
|-------------------------------------|---|
| Executive Champion                  | <ul style="list-style-type: none"><li>• Commit the organization to the project</li><li>• Establish company goals / budget / deployment date</li></ul> |
| Project Leader                      | <ul style="list-style-type: none"><li>• Develop / manage project plan</li><li>• Organize / facilitate task force meetings</li></ul>                   |
| Service Line / Department Champions | <ul style="list-style-type: none"><li>• Represent the needs of respective team</li><li>• Lead project communications with team</li></ul>              |
| M365 App Champions                  | <ul style="list-style-type: none"><li>• Develop expertise in designated app</li><li>• Facilitate app user training / knowledge sharing</li></ul>      |
| M365 Admin (IT)                     | <ul style="list-style-type: none"><li>• Manage the Admin app</li><li>• Manage data conversion / configuration settings</li></ul>                      |

# Key Deployment Decisions

- ✓ Subscription plan selection, per user
- ✓ Existing apps to retire
- ✓ Selection and timing of apps to deploy
- ✓ Data to convert / transfer
- ✓ Commitment to Teams and SharePoint
- ✓ Teams / channel structure



# ADDITIONAL RESOURCES



# Things to Know About Subscription Plans

Monthly or annual subscriptions

Modify or cancel subscriptions at any time

Application set defined by subscription plan

Install desktop apps on up to 5 devices, per user

Mix and match subscriptions by individual

Fee includes technical support from Microsoft

# Microsoft 365 Subscription Plans

- **Business** plans for small / mid size businesses
- **Enterprise** plans for larger businesses
- Purchase direct from Microsoft online or partner
- Use these links for more information



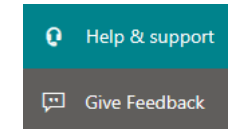
Microsoft 365 **business** subscription plan details



Microsoft 365 **enterprise** subscription plan details

# Additional Support Resources

- [Microsoft sponsored 365 training & support](#)
- [LinkedIn Learning](#)
- Microsoft 365 CPE from [Higgins Advisory](#)
- Microsoft 365 Admin 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

**Microsoft | AppSource** Partners  United States | EN

Filters: Clear all, Search filters, 48306, Rochester, Michigan, United States (100 mi radius), Edit location

- Microsoft Customer Size
- Partner capabilities
- Industries
- Products (1)
- Solution category
- Services
- Environmental, Social, Govern...

Microsoft 365

All results Sort by: Best match

| Partner Name                     | Location                                  | Services                       |
|----------------------------------|---|--------------------------------|
| Red Level                        | Novi, Michigan, United States             | Azure +12                      |
| TMR Consulting (Private) Limited | Flat Rock, Michigan, United States        | Teams +16                      |
| Apex Digital Solutions           | Southfield, Michigan, United States       | Azure +12                      |
| Worksgighted LLC                 | Wixom, Michigan, United States            | Azure +16                      |
| OnPar Technologies               | Troy, Michigan, United States             | Azure +8                       |
| CrucialLogics Inc.               | Okemos, Michigan, United States           | Enterprise Mobility & S... +13 |
| Sentinel Technologies Inc.       | Livonia, Michigan, United States          | Microsoft 365 +8               |
| Communication Square             | FARMINGTON HILLS, Michigan, United States | Azure +12                      |
| TechHouse                        | Plymouth, Michigan, United States         | Azure +16                      |
| EEC Services FZ LLC              | Detroit, Michigan, United States          | Azure +9                       |