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SMME Clinic Masterclass

Automate tasks in Microsoft 365

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SCA – Computer Software Training & Support

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SMME CLINIC
Practical Business Remedies

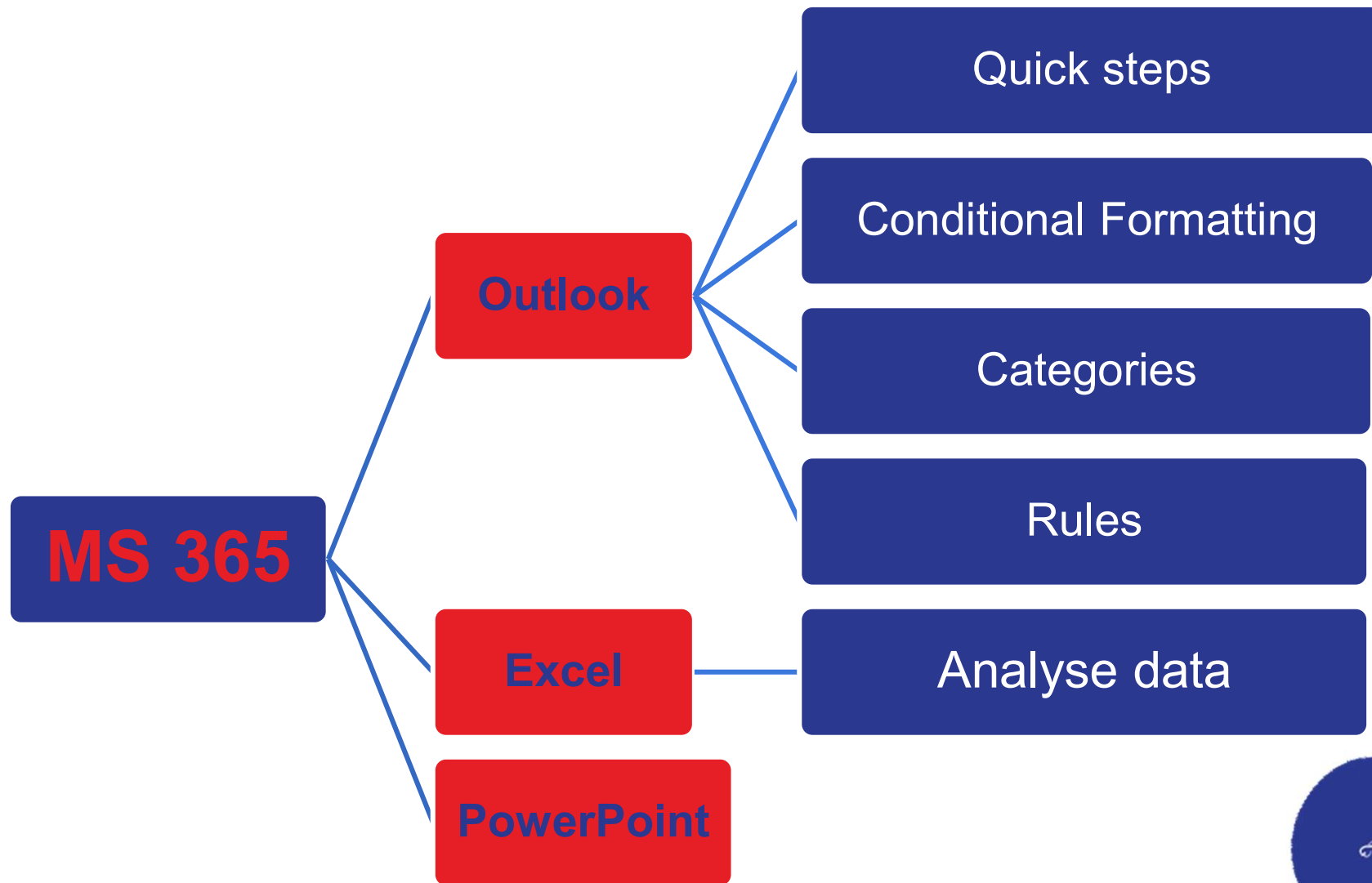
Your time is precious

Automation can make your **life easier**

Discover how **Microsoft 365**

CAN HELP YOU

automate daily tasks



Microsoft Outlook 365

Emails our life-line

Microsoft Outlook 365

Quick steps

Quick Steps are **customisable actions** that allow you to perform multiple tasks with a single click.

Help **streamline your workflow** by automating frequent or repetitive actions you take on your emails.

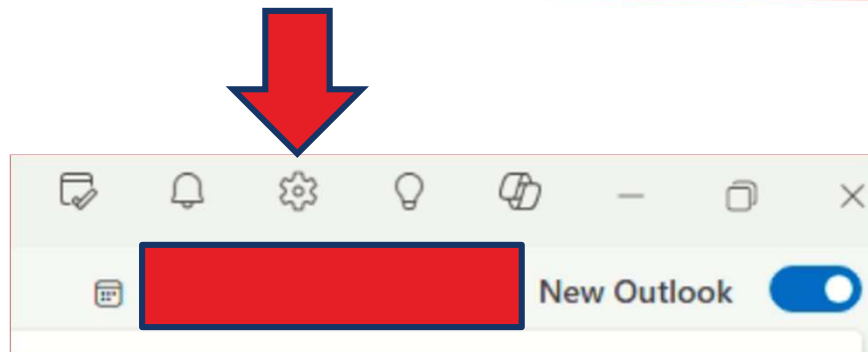
Increase Efficiency: Perform complex tasks quickly by combining multiple actions into one step.

Save Time: Reduce the time spent on routine tasks like moving emails to folders, replying, or forwarding.

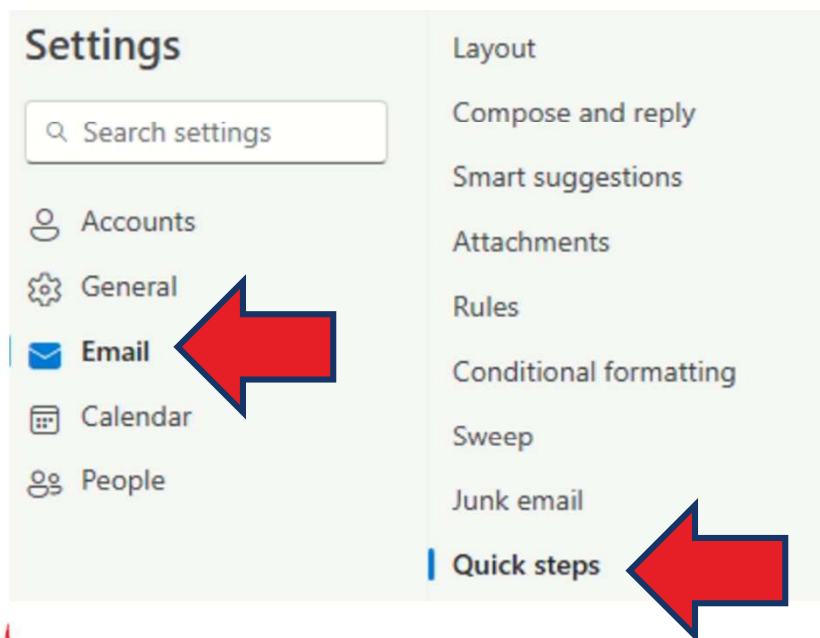
Consistency: Ensure consistent handling of similar types of emails.

Simplify Workflows: Make it easier to manage your emails and tasks, especially if you often perform the same actions.





Quick steps (one click action)



Quick steps

Quick steps are like rules but applied manually per message. With them, you can take multiple actions on a message in one click.

+ New quick step

You haven't created any quick steps yet



Quick steps (one click action)

Quick steps

✓ Forward Elmarie

2 Choose an action

Forward to Elmarie Goosen <Elmarie@ClinicPurpose.onmi... x

+ Add another action

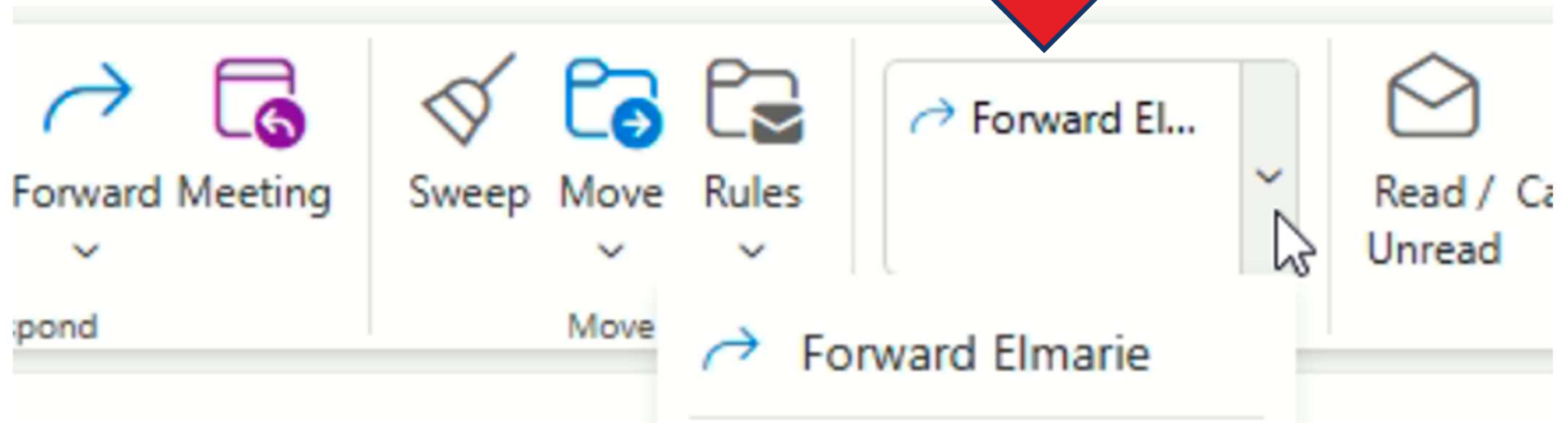
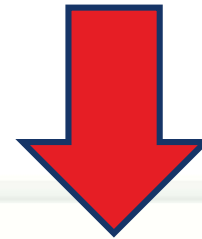
Optional

Customise your quick-step description

Choose a shortcut



Quick steps (**one** click action)



Microsoft Outlook 365

Categories



Categories in Microsoft Outlook 365 are **labels** you can assign to emails, calendar events, tasks, and contacts.

Organise and **manage** your items effectively. Categories are **color-coded**, making it easy to visually distinguish different types of information.

Organise: Easily sort and group related items, such as emails related to a specific project or client.

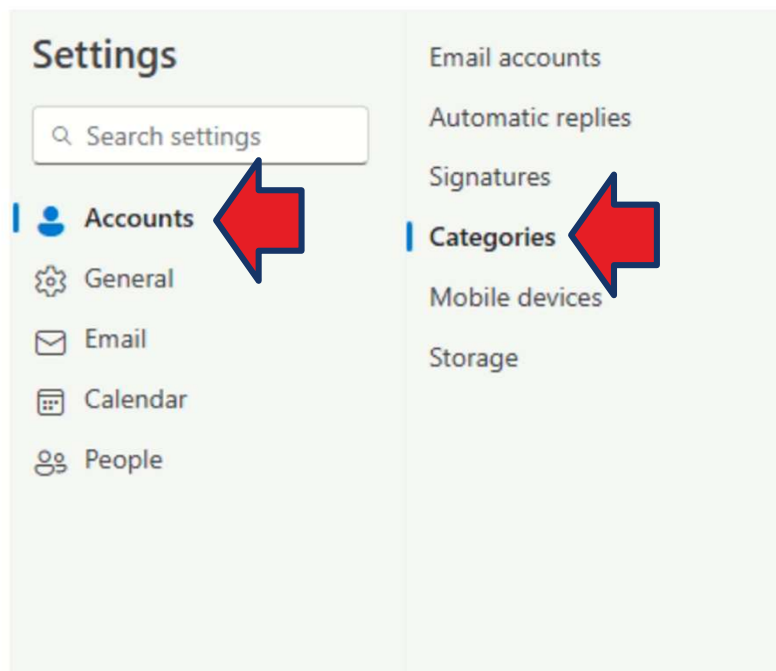
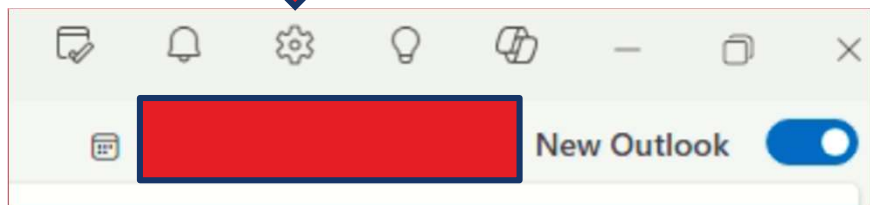
Prioritize: Quickly identify high-priority tasks or important meetings with color-coded labels.

Search Efficiency: Filter and find items faster by searching for specific categories.

Productivity: Streamline your workflow by keeping your inbox organised.



Categories

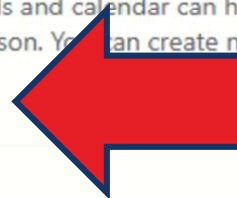


Categories

Categorising your emails and calendar can help you organise and track messages and events related to a project, task or person. You can create new categories and assign them names and colours.

[+ Create category](#)

Blue category			
DT & TAS Vodacom Project			
Green category			
Orange category			
Red category			
Yellow category			



Create new category

Name

DT & TAS Vodacom Project



Colour



Save

Cancel



Category

The screenshot shows a mobile application interface. On the left, there is a list of items. The first item is a blue circle followed by the text 'Microsoft'. Below it are five items, each with a green circle containing the letters 'RA' followed by the text 'Read Assistant'. At the bottom of this list is a green bar with a downward arrow and the text 'Last month'. A context menu is open to the right of the list. The menu options are: 'Copy to folder...', 'Copy', 'Categorise', 'Mark as read', 'Flag', 'Pin', 'Snooze', and 'Ignore'. The 'Categorise' option is highlighted with a grey background, and a red arrow points to it. A hand icon is shown clicking on 'Categorise'. To the right of the 'Categorise' option is a sub-menu. The sub-menu has a search bar with the text 'Search for a category'. Below the search bar are three options: 'Green category' with a green tag icon, 'Orange category' with an orange tag icon, and 'Red category' with a red tag icon. A red arrow points to the 'Orange category' option. Below these are two more options: 'New category' and 'Manage categories'. The background of the app shows a list of items, with the top item being 'The Microsoft Build sessions you missed'.

Item	Category	Action
Microsoft		Copy to folder...
Read Assistant	RA	Copy
Read Assistant	RA	Categorise
Read Assistant	RA	Mark as read
Read Assistant	RA	Flag
Read Assistant	RA	Pin
Read Assistant	RA	Snooze
Read Assistant	RA	Ignore
Last month		

Category
Search for a category
Green category
Orange category
Red category
New category
Manage categories



Microsoft Outlook 365

Conditional formatting

Conditional formatting allows you to automatically change the appearance of your emails, calendar events, tasks, and contacts based on specific criteria.

This feature helps **highlight important items**, making it easier to manage and prioritize your communications and schedule.

Highlight Important Items: Automatically highlight emails from specific senders, tasks with urgent deadlines, or events with high priority.

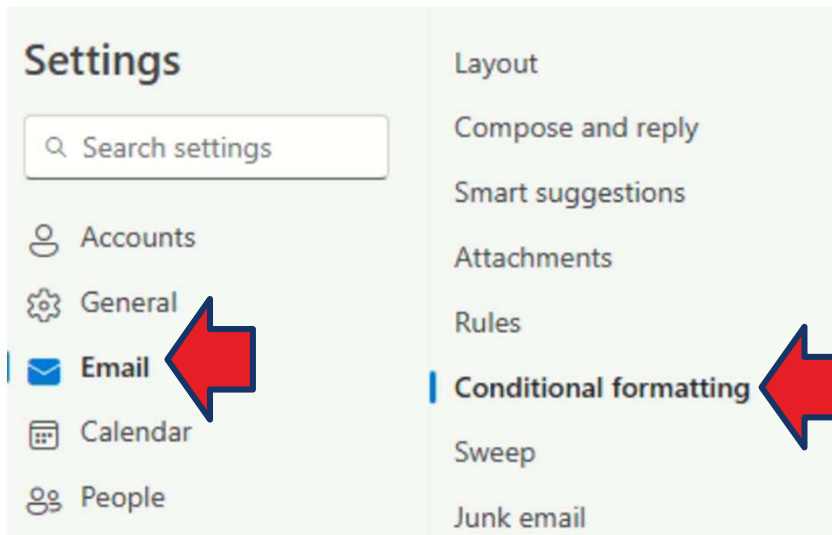
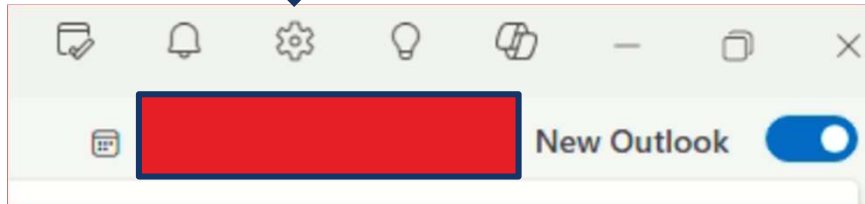
Improved Organisation: Differentiate between various types of emails or calendar events using customised formatting rules.

Quick Identification: Quickly identify critical information at a glance, without manually scanning through your inbox or calendar.

Enhanced Productivity: Save time and reduce the risk of missing important communications or appointments by visually prioritizing key items.



Conditional Formatting



Conditional formatting

Create conditional formatting rules to personalise the colour of your incoming email messages within the message list. The rules will run in the order shown in the list below, starting with the one at the top.

[+ Create a new conditional formatting rule](#)

You don't have any conditional formatting rules yet.



Conditional Formatting

Conditional formatting

1 ☒ Microsoft

2 Condition

Select a condition

- People
- From
- My name is
- I'm on the To or Cc line
- I'm on the To line
- I'm not on the To line
- I'm on the Cc line
- Subject
- Subject includes

3

Conditional formatting


1 ☒ Microsoft

2 Condition

From

+ Add another condition

3 ☒ Select the font colour





Conditional formatting

Conditional formatting

✓ Microsoft

✓ Condition

From

Microsoft Support <support@mail.support.micr... X

+ Add another condition

✓ Select the font colour

Choose colour



Select the font colour





Preview

AaBbYyZy

OK

Cancel

Conditional Formatting result

Inbox ☆			 
Microsoft Support	Case 2402060050000412 Your question was successfully submitted to Microsoft ...	2024-02-06	
Microsoft Support	Case 2402060050000412 Your question was successfully submitted to Microsoft ...	2024-02-06	
Trang N	Copilot to my Microsoft plan - TrackingID#2402050050000200	2024-02-06	←
Quan V	RE: Copilot to my Microsoft plan - TrackingID#2402050050000200	2024-02-06	←



Microsoft Outlook 365

Rules

Email rules are automated actions that are applied to incoming or outgoing emails based on specific criteria you set.

Rules can help you **manage your inbox** more effectively by organising, categorising, or performing certain actions on your emails automatically.

Automate Organisation: Automatically sort emails into folders, apply categories, or flag important messages, reducing manual sorting.

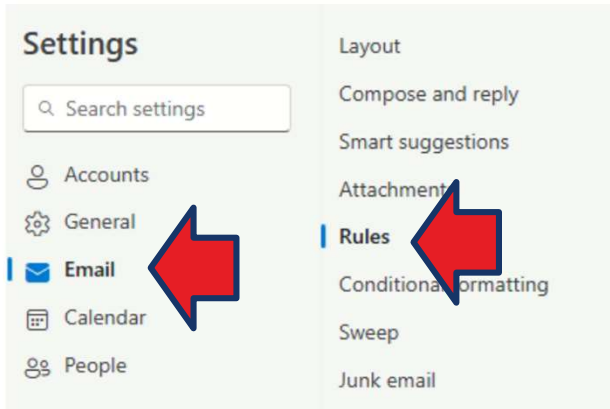
Enhance Productivity: Streamline your workflow by automatically processing routine tasks, such as forwarding specific emails to a colleague or setting up notifications.

Reduce Clutter: Keep your inbox tidy by automatically deleting spam or moving less important emails to designated folders.

Ensure Consistency: Apply consistent actions to similar types of emails, ensuring important messages are always flagged or categorized correctly.



Email Rules



Rules

You can create rules that tell Outlook how to handle incoming email messages. You choose both the conditions that trigger a rule and the actions the rule will take. Rules will run in the order shown in the list below, starting with the rule at the top.

+ Add new rule



SharePoint Online

If the message was received from 'SharePoint Online', move the message to folder 'Recordings'.



Rules

1

Name your rule

2

Add a condition

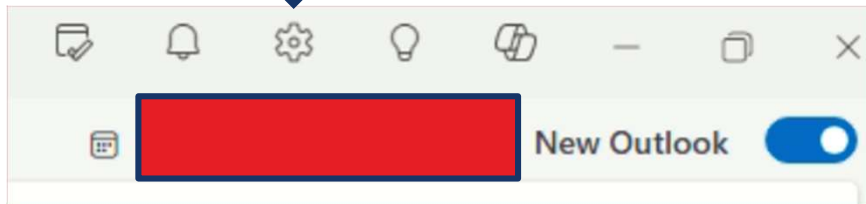
Select a condition

3

Add an action

Select an action

[Add an exception](#)



Email Rules

Rules



DT & TAS Vodacom Project



Add a condition

From



Elmarie Goosen <[redacted]@hi...> X

[Add another condition](#)



Add an action

Categorise



DT & TAS Vodacom Project



[Add another action](#)

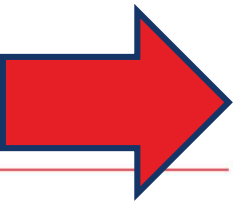
[Add an exception](#)



Stop processing more rules



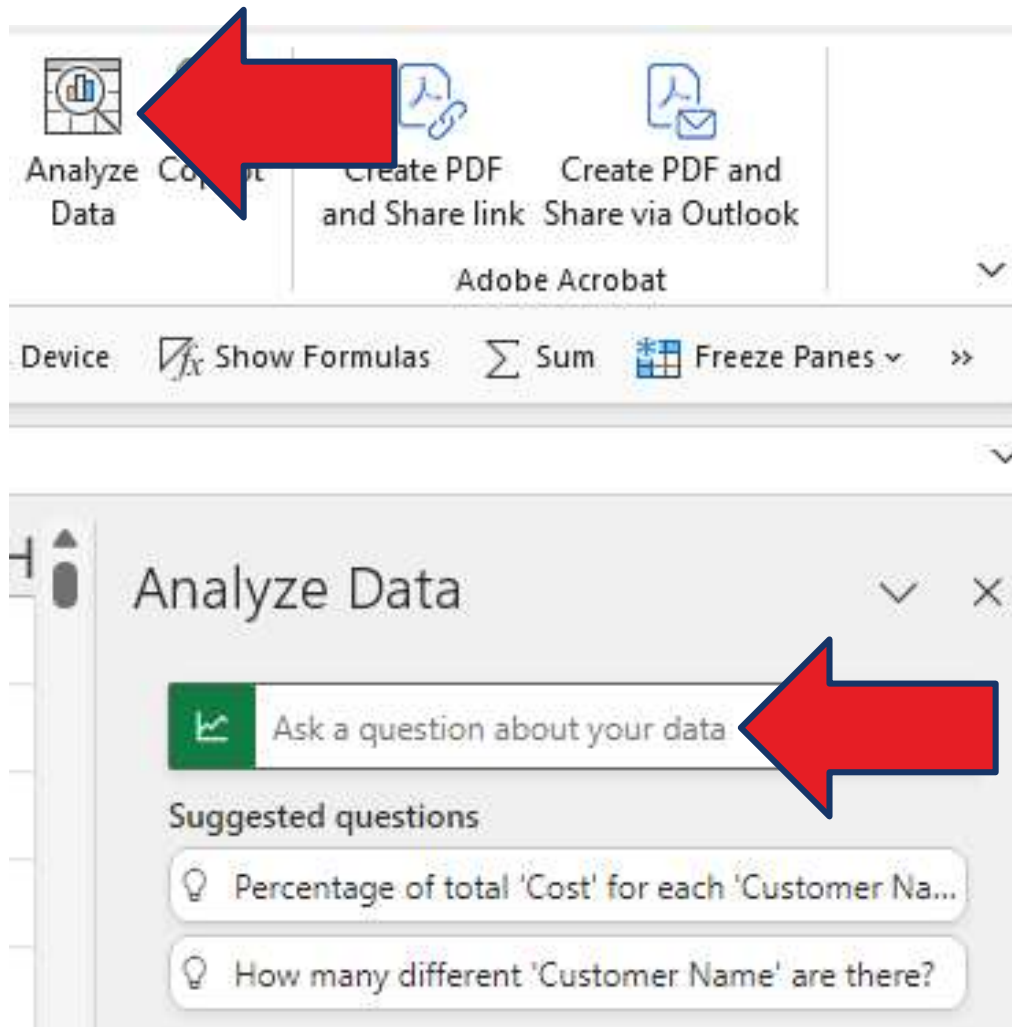
Run rule now



Microsoft Excel 365

Analyse data

What is the total cost per customer



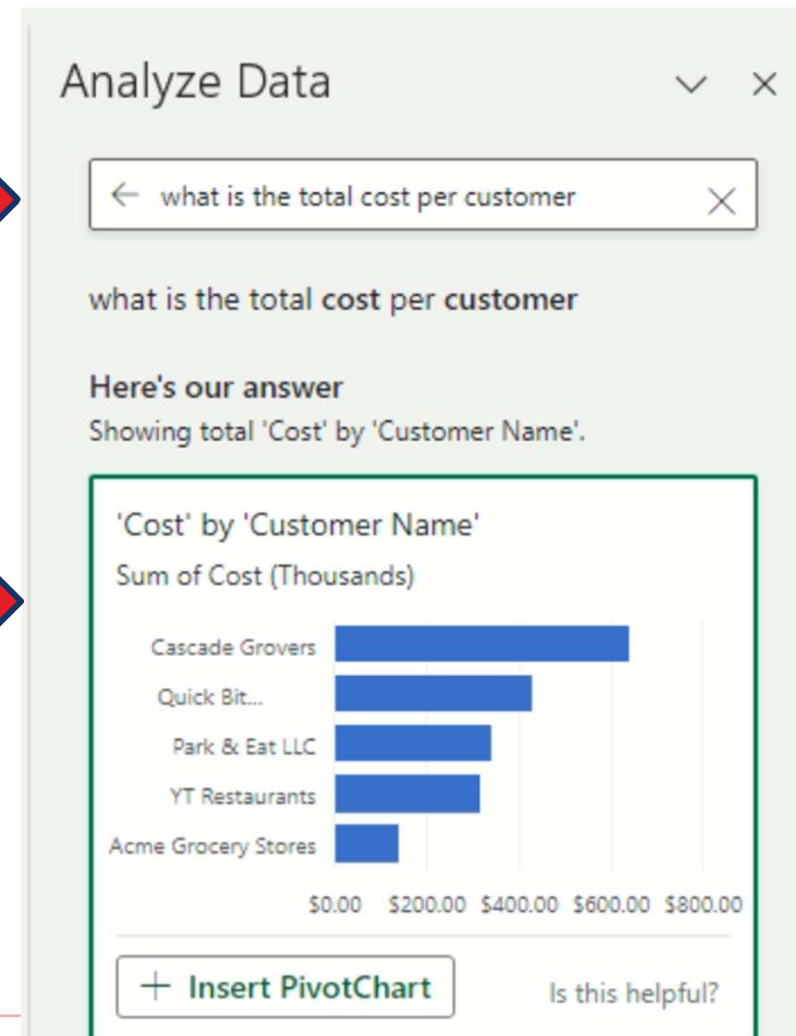
The screenshot shows the Microsoft Excel interface. The ribbon at the top includes the 'Analyze Data' icon, which is highlighted by a red arrow. Below the ribbon, the 'Analyze Data' task pane is open. It features a search bar with the text 'Ask a question about your data' and a green arrow icon. Below the search bar, there are 'Suggested questions' listed in rounded rectangles. A red arrow points from the search bar to the right, and another red arrow points from the 'Suggested questions' section to the right.

Analyze Data

Ask a question about your data

Suggested questions

- Percentage of total 'Cost' for each 'Customer Na...
- How many different 'Customer Name' are there?



The screenshot shows the 'Analyze Data' task pane with the question 'what is the total cost per customer' entered in the search bar. The pane displays the answer: 'Here's our answer' followed by 'Showing total 'Cost' by 'Customer Name''. Below this, a horizontal bar chart titled ''Cost' by 'Customer Name'' shows the 'Sum of Cost (Thousands)' for five customers. The x-axis ranges from \$0.00 to \$800.00. The y-axis lists the customers: Cascade Grovers, Quick Bit..., Park & Eat LLC, YT Restaurants, and Acme Grocery Stores. A red arrow points from the search bar to the chart. At the bottom of the chart, there is a button labeled '+ Insert PivotChart' and a link labeled 'Is this helpful?'.

Analyze Data

what is the total cost per customer

what is the total cost per customer

Here's our answer

Showing total 'Cost' by 'Customer Name'.

'Cost' by 'Customer Name'

Sum of Cost (Thousands)

Customer Name	Sum of Cost (Thousands)
Cascade Grovers	~650
Quick Bit...	~450
Park & Eat LLC	~350
YT Restaurants	~300
Acme Grocery Stores	~150

+ Insert PivotChart

Is this helpful?

Microsoft PowerPoint 365


Copilot 365

Copilot 365

PROMPT


Prepare a 10-slide PowerPoint presentation for 'Healthy Bites Cafe,' a local health-focused eatery. The presentation should demonstrate effective marketing strategies to attract health-conscious customers and boost online orders. The target audience is small restaurant owners who want to improve their digital marketing efforts. The total presentation should be about 20 minutes, including time for questions.





 Copilot

I can chat, respond to questions, and help you draft this presentation.





Here are some things you can try...


 Create a presentation about...

 Create presentation from file...

 Add a slide about...


Prepare a 10-slide PowerPoint presentation for 'Healthy Bites Cafe,' a local health-focused eatery. The presentation should demonstrate effective marketing strategies to attract




 Copilot

Prepare a 10-slide PowerPoint presentation for 'Healthy Bites Cafe,' a local health-focused eatery. The presentation should demonstrate effective marketing strategies to attract health-conscious customers and boost online orders. The target audience is small restaurant owners who want to improve their digital marketing efforts. The total presentation should be about 20 minutes, including time for questions.

Still working on it...

 Stop generating



 Copilot

should be about 20 minutes, including time for questions.

Okay, here you go. A 10-slide PowerPoint presentation for 'Healthy Bites Cafe' has been generated. The presentation demonstrates effective marketing strategies to attract health-conscious customers and boost online orders. It is designed for small restaurant owners who want to improve their digital marketing efforts and lasts about 20 minutes, including time for questions.

If you'd like, **Designer** also has other layout options to consider.

AI-generated content may be incorrect






Slides: 7 of the 10 requested

Welcome to Healthy Bites Cafe Marketing Strategies


Effective marketing tips for small restaurants



1

★

Presentation Overview




Target Market:
Understanding your target market is essential for creating a successful business. We will discuss how to identify your target market and tailor your marketing strategies to reach them effectively.

Online Presence:
Creating a strong online presence is crucial for any business. We will discuss how to build and maintain a professional website, and strategies for optimizing your online presence.

Social Media:
In today's digital age, social media is a powerful tool for businesses. We will discuss how to leverage social media platforms to increase brand awareness, engage with customers, and encourage repeat business.

Q&A:
We will leave time for questions at the end of this presentation.

2




Understanding Your Target Market

Identifying Your Target Audience:
Identifying your target audience is the first step in developing effective marketing strategies. We discuss researching your customer demographic, psychographic, and behavioral characteristics.

Developing Customer Personas:
Developing customer personas is an effective way to better understand your target audience. This involves creating fictional characters that represent your ideal customers, based on their demographics, psychographics, and behavioral characteristics.

3


Developing Customer Personas



Developing customer personas is a powerful way to gain insight into your target audience's needs and wants. By creating detailed profiles of your customer base, you can tailor your marketing strategies to each persona effectively, ensuring that your campaigns are highly targeted and impactful.

5

Creating a Strong Online Presence




Website Design:
An effective website design is crucial for building and maintaining a strong online presence. We will explore the key elements of website design, including responsive design, user interface, and search engine optimization.

Optimization Techniques:
Optimizing your website for search engines is vital for increasing your online visibility and attracting potential customers. We will discuss SEO best practices, including keyword research, on-page optimization, and content building.

User-Friendly Online Ordering Systems:
Creating a user-friendly online ordering system is essential for improving customer engagement and generating repeat sales. We will explore the key elements of a successful online ordering system, including ease of use, security, and payment processing.

6



Website Design and Optimization

Responsive Design:
A responsive website design ensures that your website looks great and is easy to navigate on all devices, including mobile phones and tablets.

User-Friendly Navigation:
A user-friendly navigation system makes it easy for customers to find what they're looking for on your website and place an order.

Optimized Content:
Optimizing content is important for search engine optimization (SEO) and also helps improve your website's usability and conversion rate on search engines like Google.

7

Microsoft Outlook 365

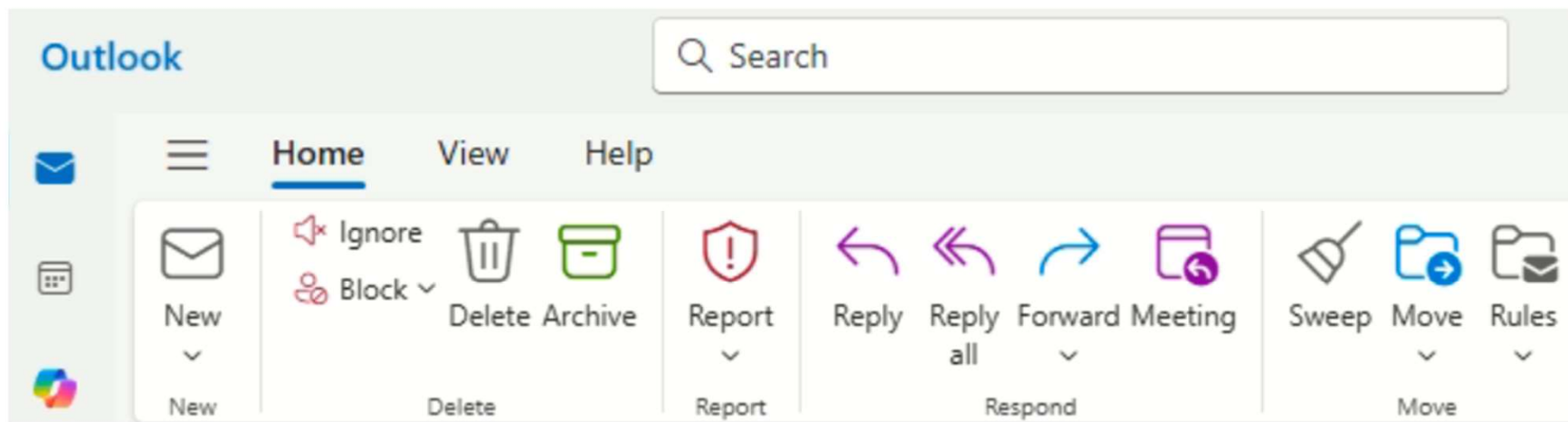
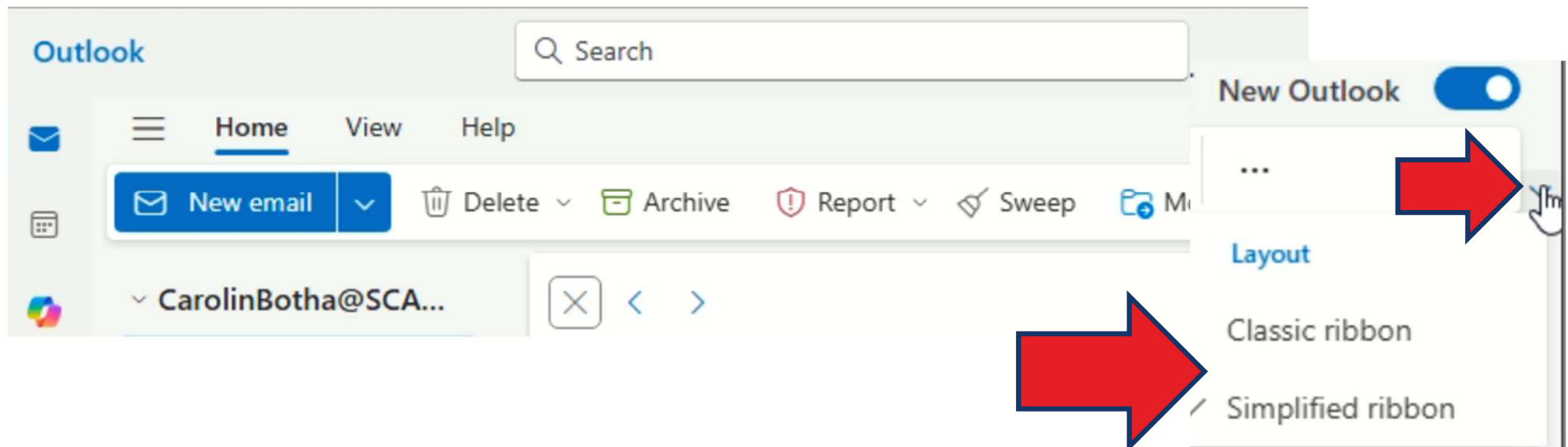
Setings

Microsoft Outlook 365

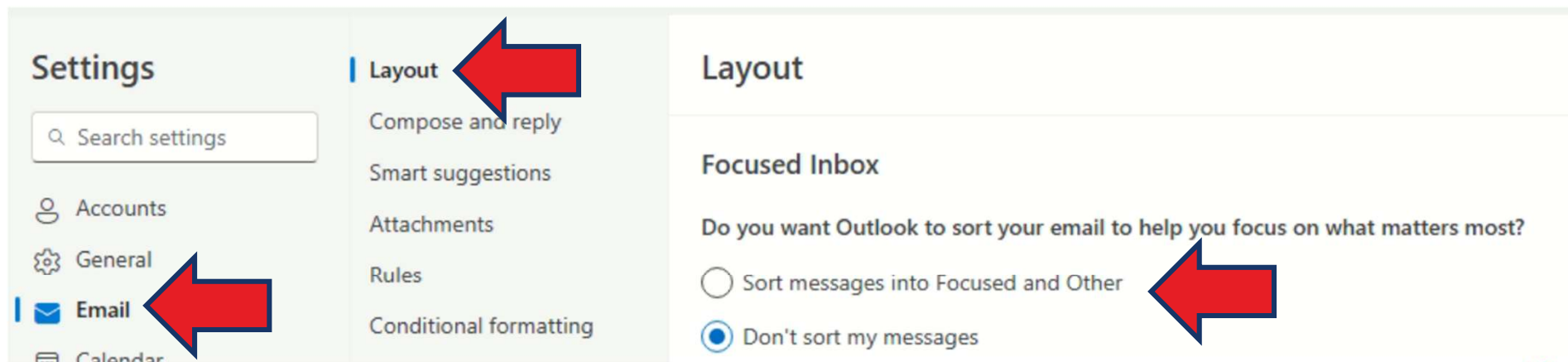
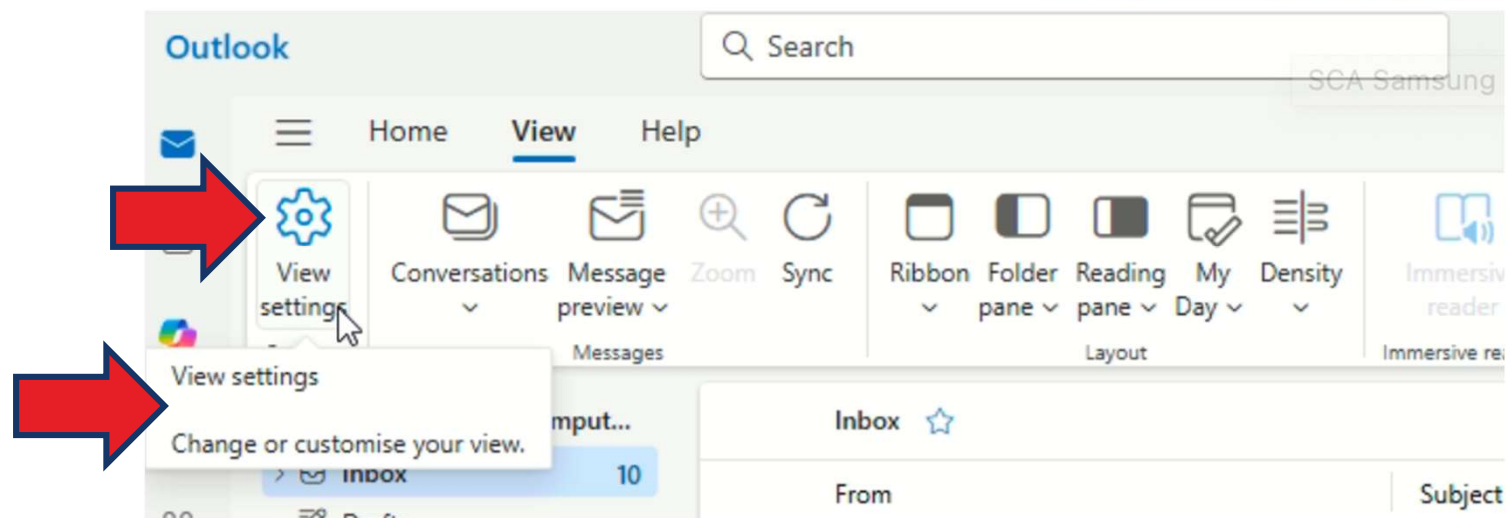
Emails: our life-line



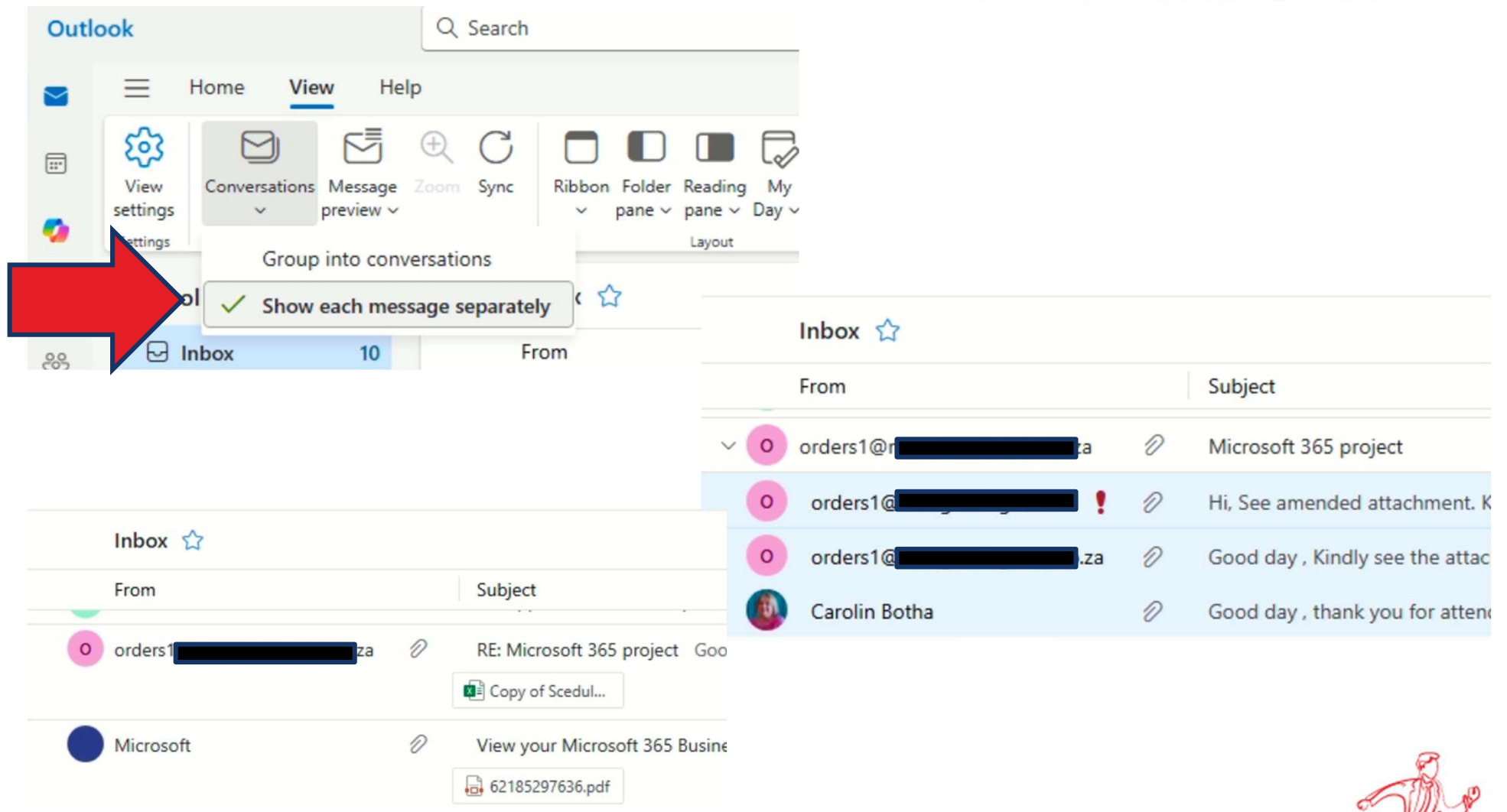
Layout: Ribbon



Focused Inbox



Conversations View



Outlook

Search

Home View Help

View settings

Conversations Message preview Zoom Sync Ribbon Folder pane Reading pane My Day Layout

Group into conversations

✓ Show each message separately

Inbox 10

From

Inbox ☆

From	Subject
orders1@██████████.za	Microsoft 365 project
orders1@██████████.za	Hi, See amended attachment. K
orders1@██████████.za	Good day , Kindly see the attac
Carolin Botha	Good day , thank you for attent

Inbox ☆

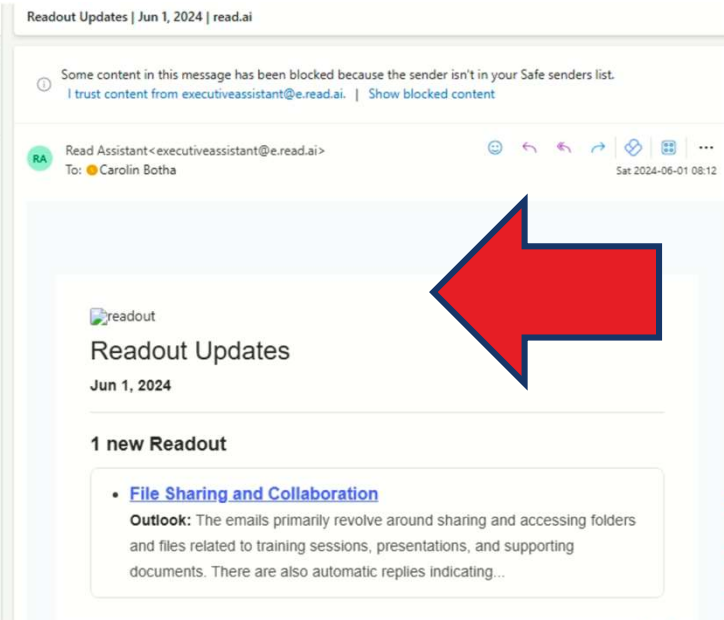
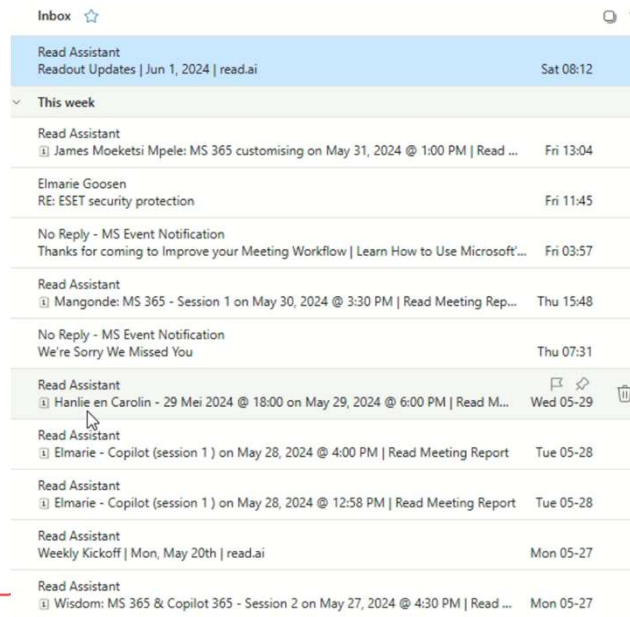
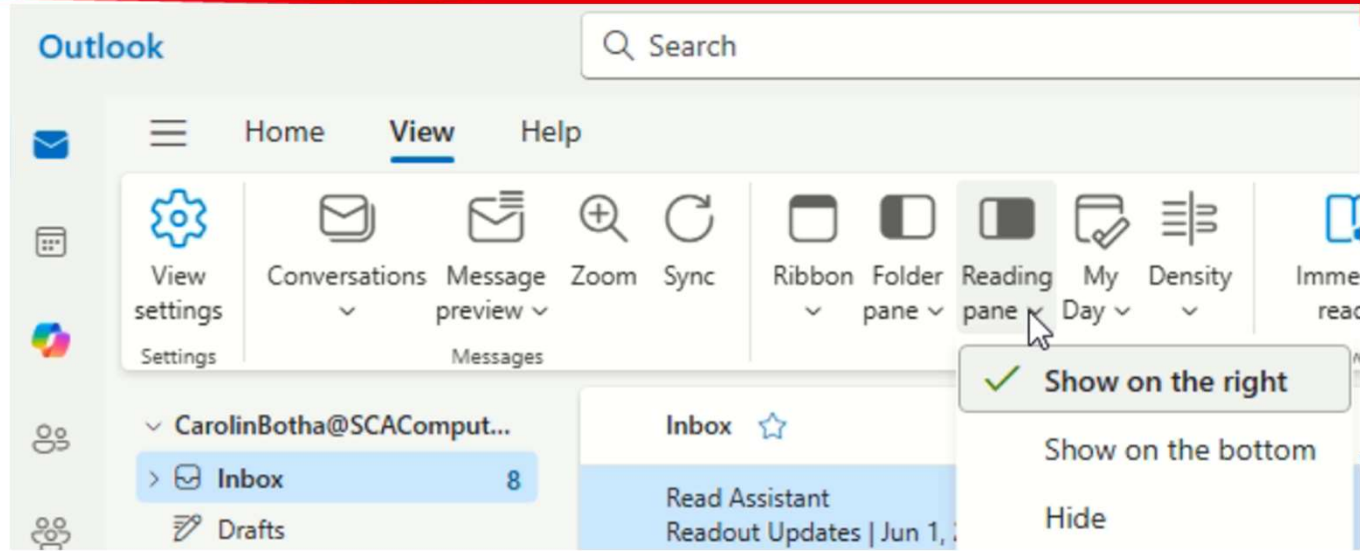
From	Subject
orders1@██████████.za	RE: Microsoft 365 project Goo
Microsoft	View your Microsoft 365 Busine

Copy of Scedul...

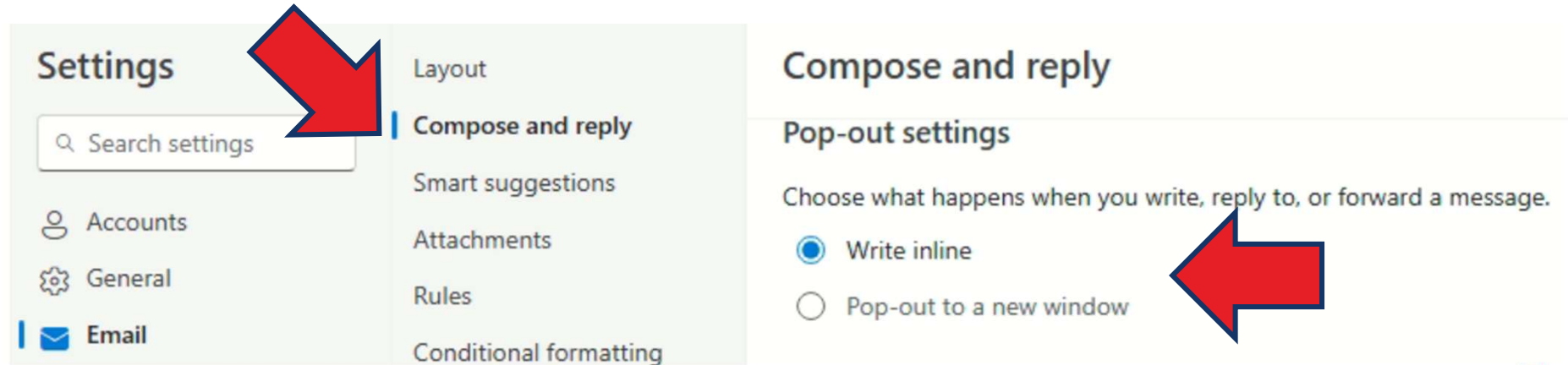
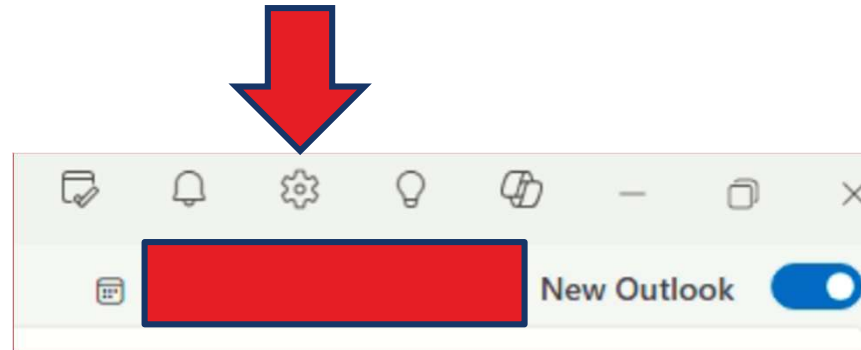
62185297636.pdf



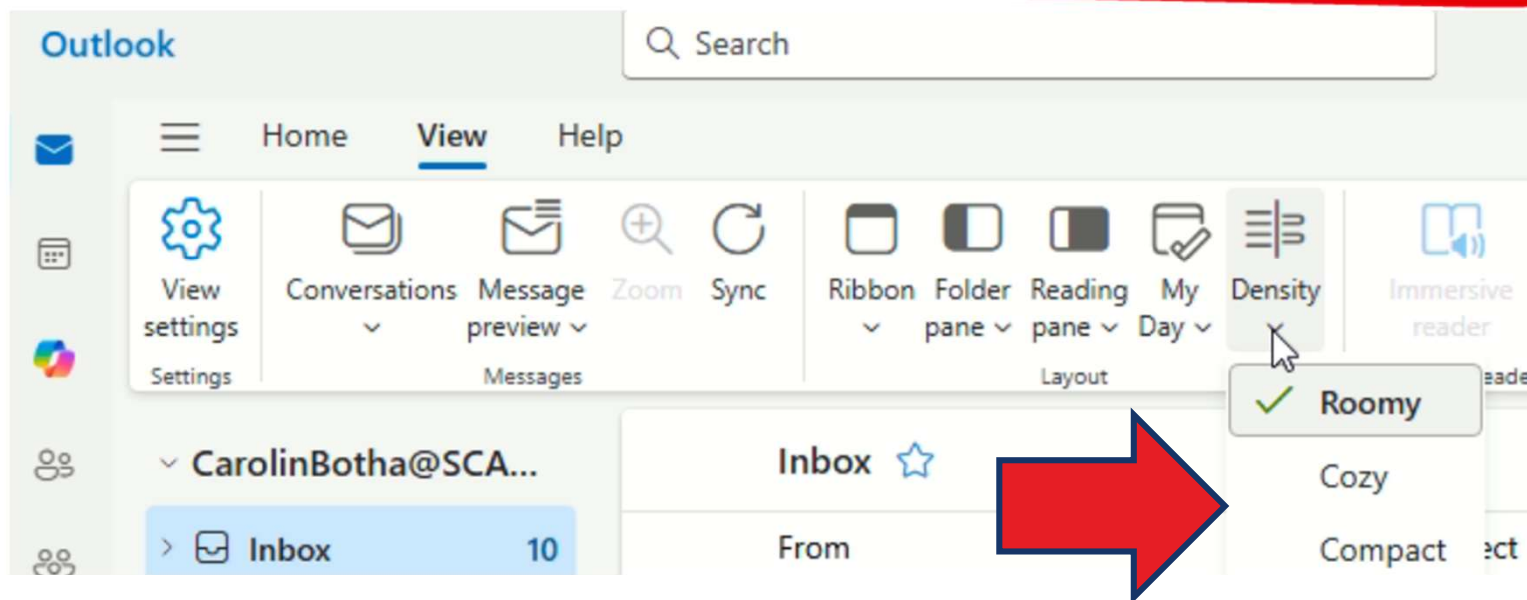
Reading Pane



Inline vs Pop-out



Density



Inbox ☆	
From	Subject
From: [redacted]	Re: ESET security protection - Good day we would like to renew
<input type="checkbox"/> No Reply - MS Event Notification	We're Sorry We Missed You Unlocking Success: Hands-On with
<input type="checkbox"/> Read Assistant	1 Ha [redacted] 2024 @ 18:00 on May 29, 2024 @
<input type="checkbox"/> Read Assistant	1 Elr [redacted] 1) on May 28, 2024 @ 4:00 PM R
<input type="checkbox"/> Read Assistant	1 Elr [redacted] 1) on May 28, 2024 @ 12:58 PM I
<input type="checkbox"/> Read Assistant	Week [redacted] 0th read.ai Need a recap? Review
<input type="checkbox"/> Read Assistant	1 W [redacted] pt 365 - Session 2 on May 27, 2024
<input type="checkbox"/> Read Assistant	1 Tappans: MS 365 & Copilot 365 - Session 2 on May 27, 2024



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