

# Microsoft Outlook “Must Know” Email Tips



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

# Learning Objectives



- Identify Outlook features to help you compose email messages faster and better
- Identify the Outlook features you can use to process and organize your inbox more efficiently
- Configure your Outlook to create customized views and feature settings.
- Learn to leverage the integration of Outlook with other Microsoft 365 apps

# John H. Higgins, CPA.CITP

## Strategic Technology Advisor



[john@higginsadvisoryllc.com](mailto:john@higginsadvisoryllc.com)



Copyright (c) 2025 Higgins Advisory, LLC - Unauthorized reproduction prohibited  
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

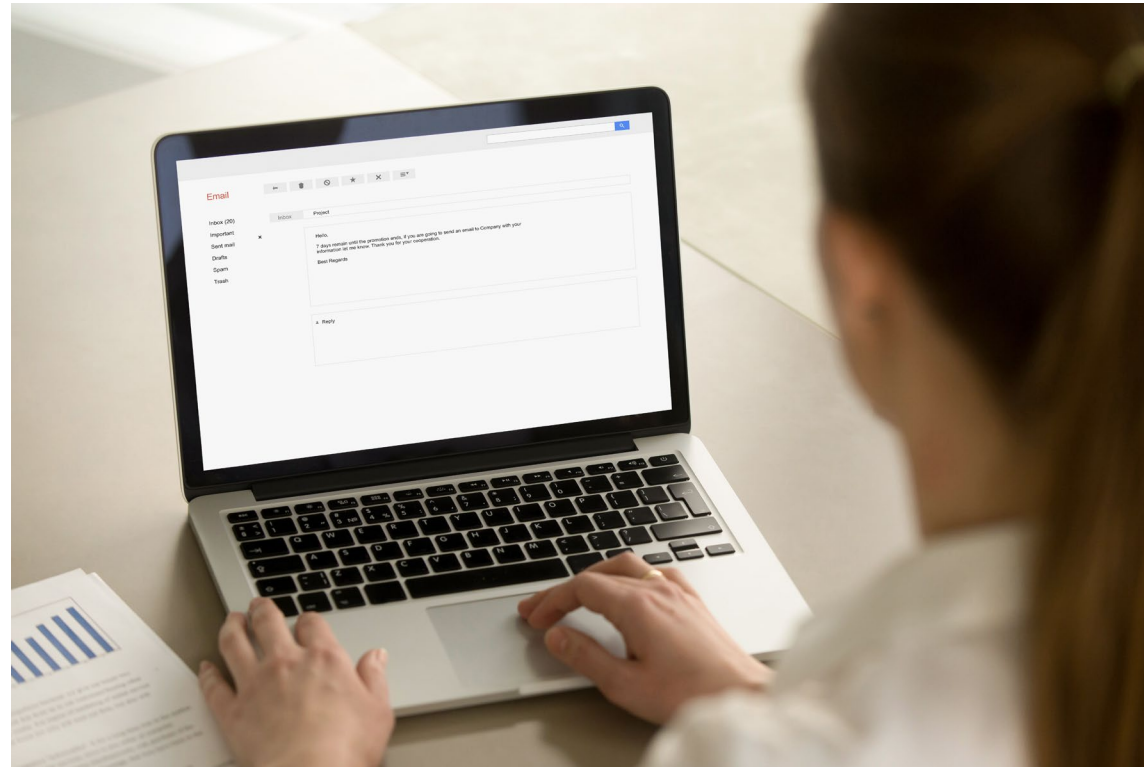
Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!

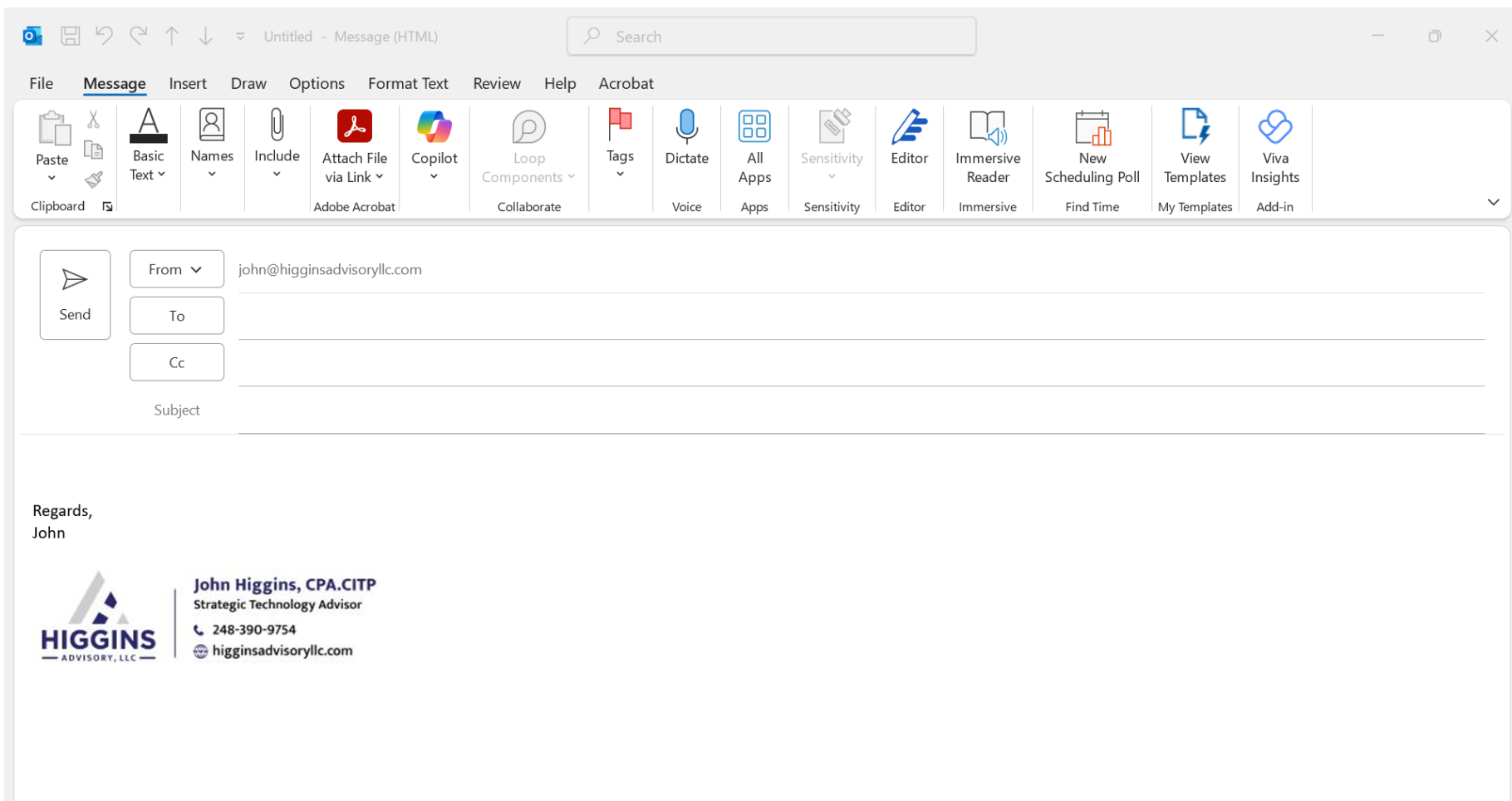
# Presentation Outline

- Email Composition Tools
- Inbox Processing & Organization
- Outlook Office 365 Integrations
- New Outlook Desktop Interface
- Wrap-up

# EMAIL COMPOSITION TOOLS



# New Message Toolbar



# Email Composition Tools

- Dictate
- Quick Parts / Templates
- Using Tags
- Scheduling Poll
- Insert Toolbar
- Option Settings
- Copilot

# INBOX PROCESSING & ORGANIZATION





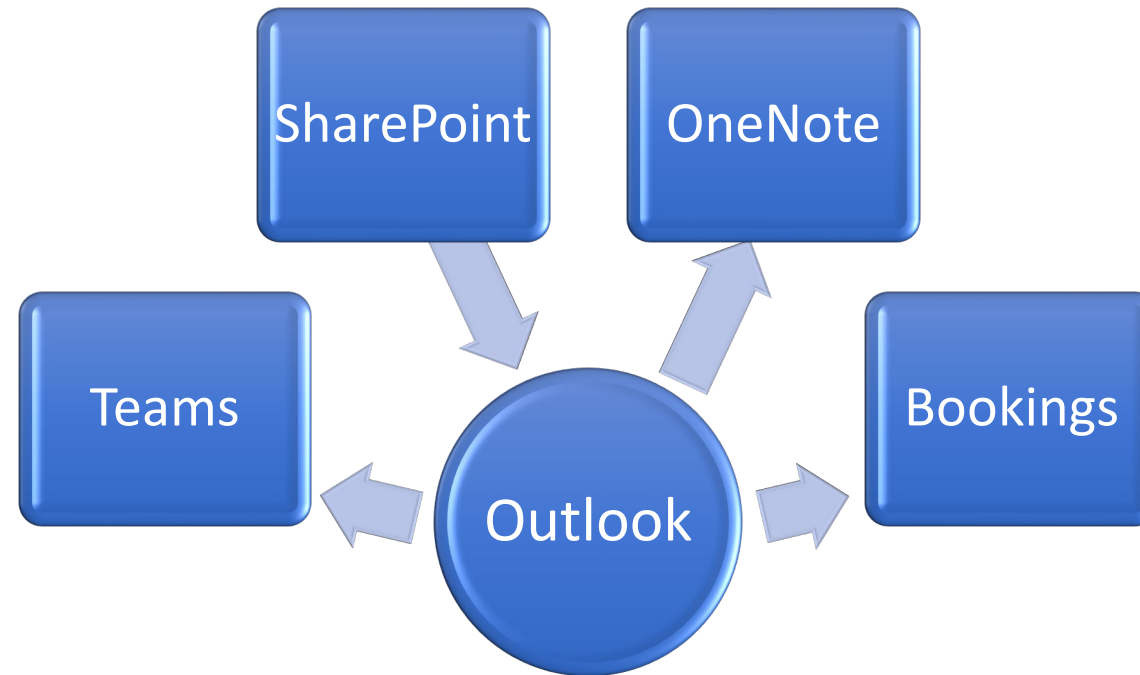
# View Management

- Focused Inbox
- Message Preview
- Arrangement
- Reading Pane
- To Do Bar
- Close All Items
- View Settings

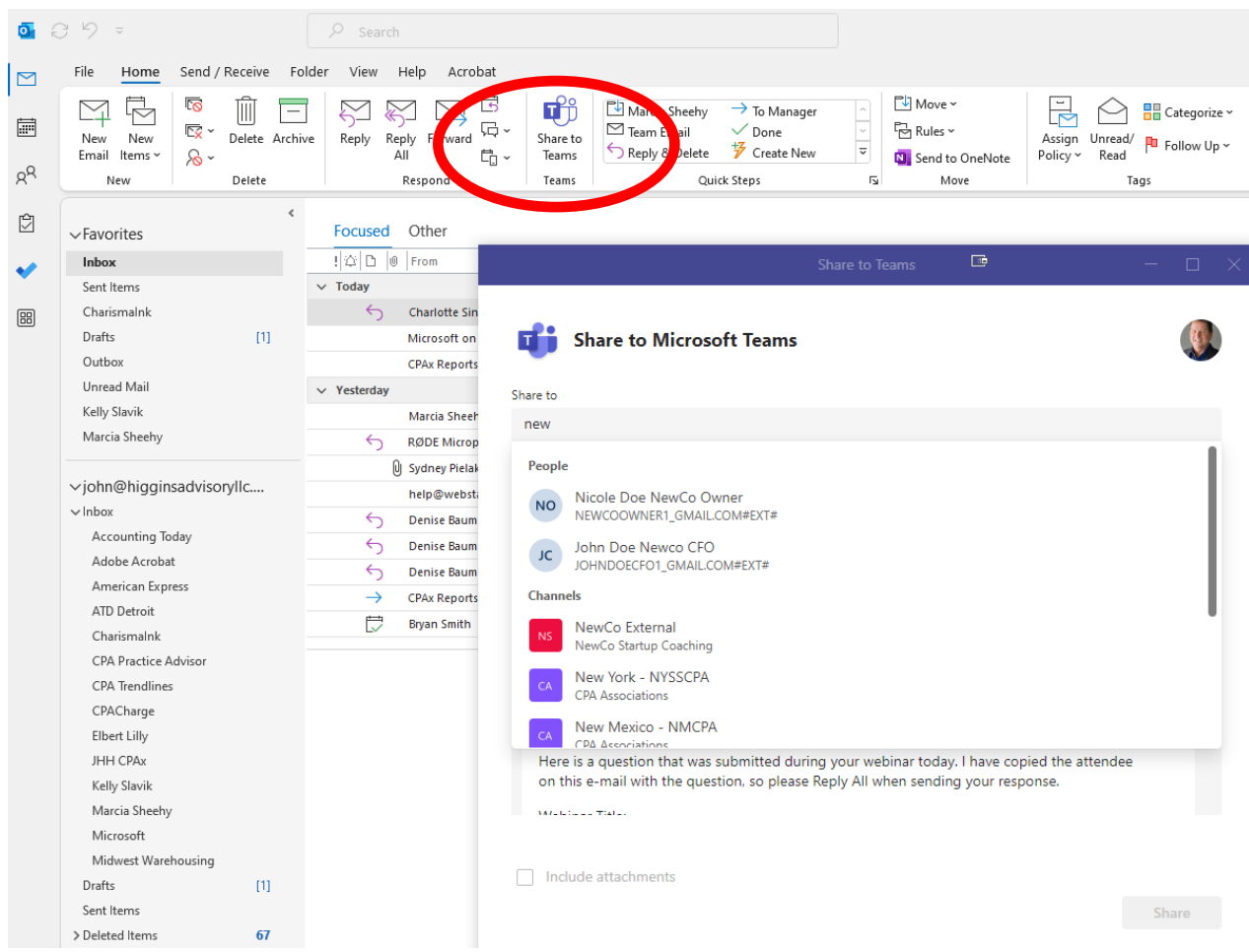
# Inbox Organization

- Folders – Search / Clean-up / Favorites
- Rules
- Quick Steps
- Archive

# OUTLOOK OFFICE 365 INTEGRATIONS



# Share to Teams



# Sending SharePoint Files Securely: Use File Link

The screenshot shows the Microsoft Word interface for composing an email. The ribbon includes tabs for File, Message, Insert, Draw, Options, Format Text, Review, and Help. The Message tab is active, showing options for Paste, Basic Text, Names, Include, Adobe Acrobat, Collaborate, Tags, and Voice. The email header shows 'From: john@higginsadvisoryllc.com'. The body of the email contains 'Regards, John' and a signature block for John Higgins, CPA.CITP, Strategic Technology Advisor, with contact information: 248-390-9754 and higginsadvisoryllc.com. A dialog box titled 'How do you want to attach this file?' is open, showing two options: 'Share link' (Recipients can see the latest changes and respond in real time.) and 'Attach as copy' (Everyone receives a separate copy of this file.). A yellow callout bubble points to the dialog with the text 'Requires file to be stored in OneDrive or SharePoint'. On the right, a preview of the email shows the file 'Higgins Advisory LLC W9.pdf' with a link icon, and options for 'Anyone with the link can view', 'Manage access', 'Open link', and 'Copy link'.

# Establish File Link Access Controls

Sharing settings

Higgins Advisory LLC W9.pdf

Share the link with

Anyone

Share with anyone, doesn't require sign-in

☒

People in Higgins Advisory, LLC

☐

Recipients of this message

☐

People with existing access

☐

More settings

Can view

Expires Sunday, Apr 6, 2025

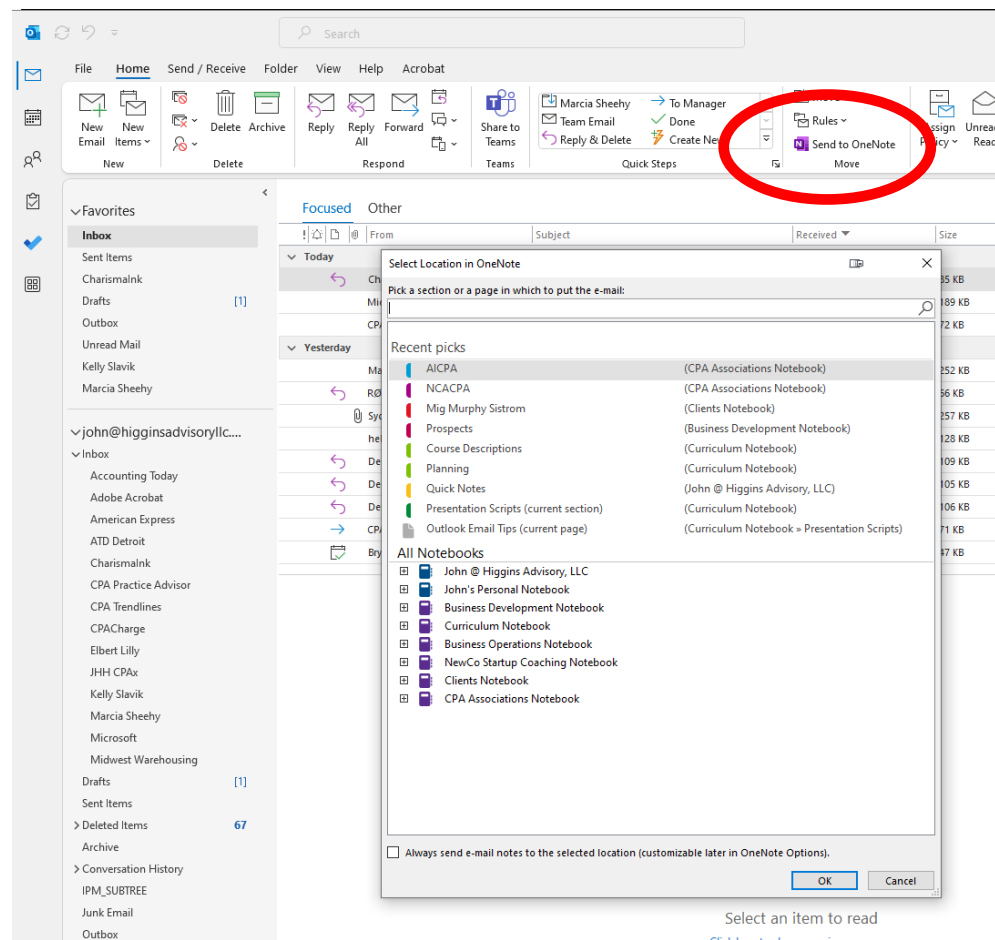
Set password

Apply

Cancel


Establish file sharing link permissions

# Sent to OneNote



# Bookings App





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

1 hour

30-minute meeting

Schedule a 30 minute meeting

30 minutes

Booking for 1-hour meeting

SELECT STAFF (OPTIONAL)

Anyone

October 24

DATE

TIME

< > December 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
24	25	26	27	28	29	30
31						

9:15 AM

9:45 AM

10:15 AM

10:45 AM

11:15 AM

11:45 AM

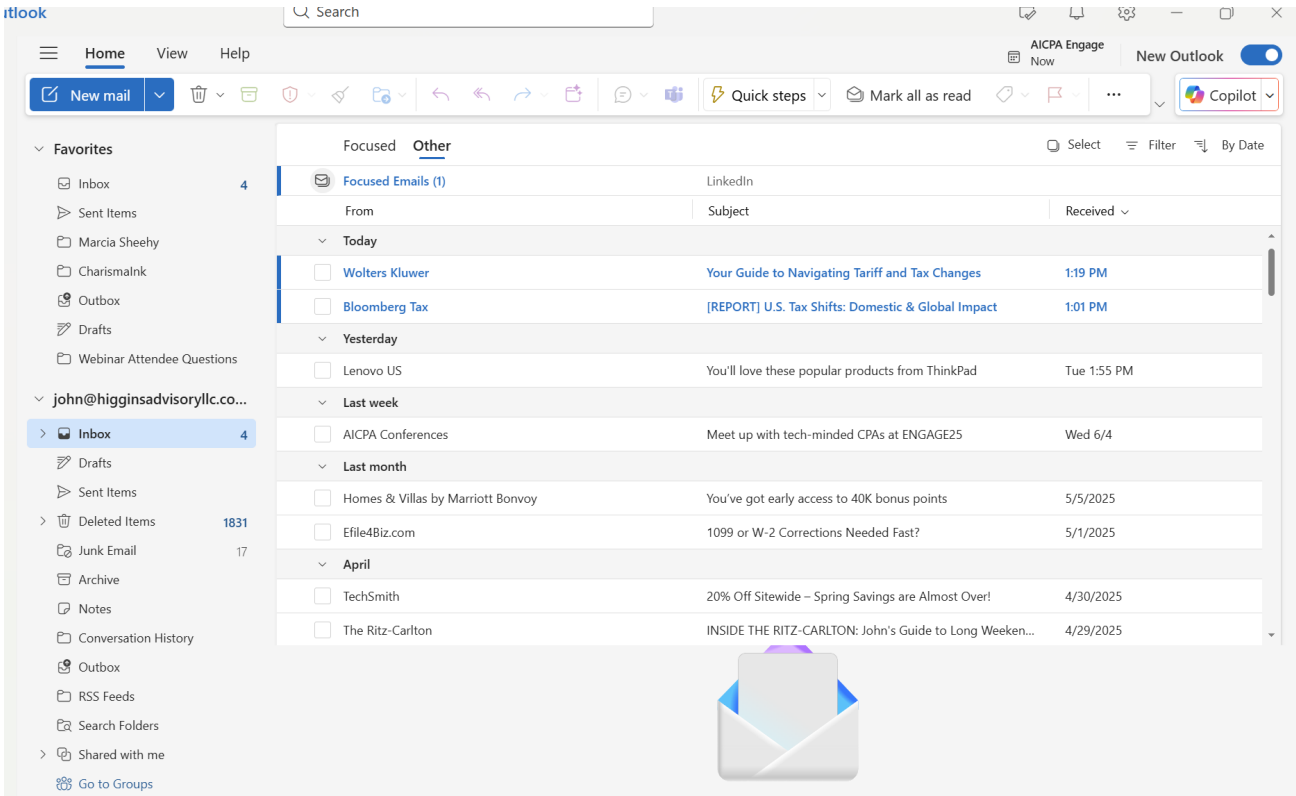
12:15 PM

12:45 PM

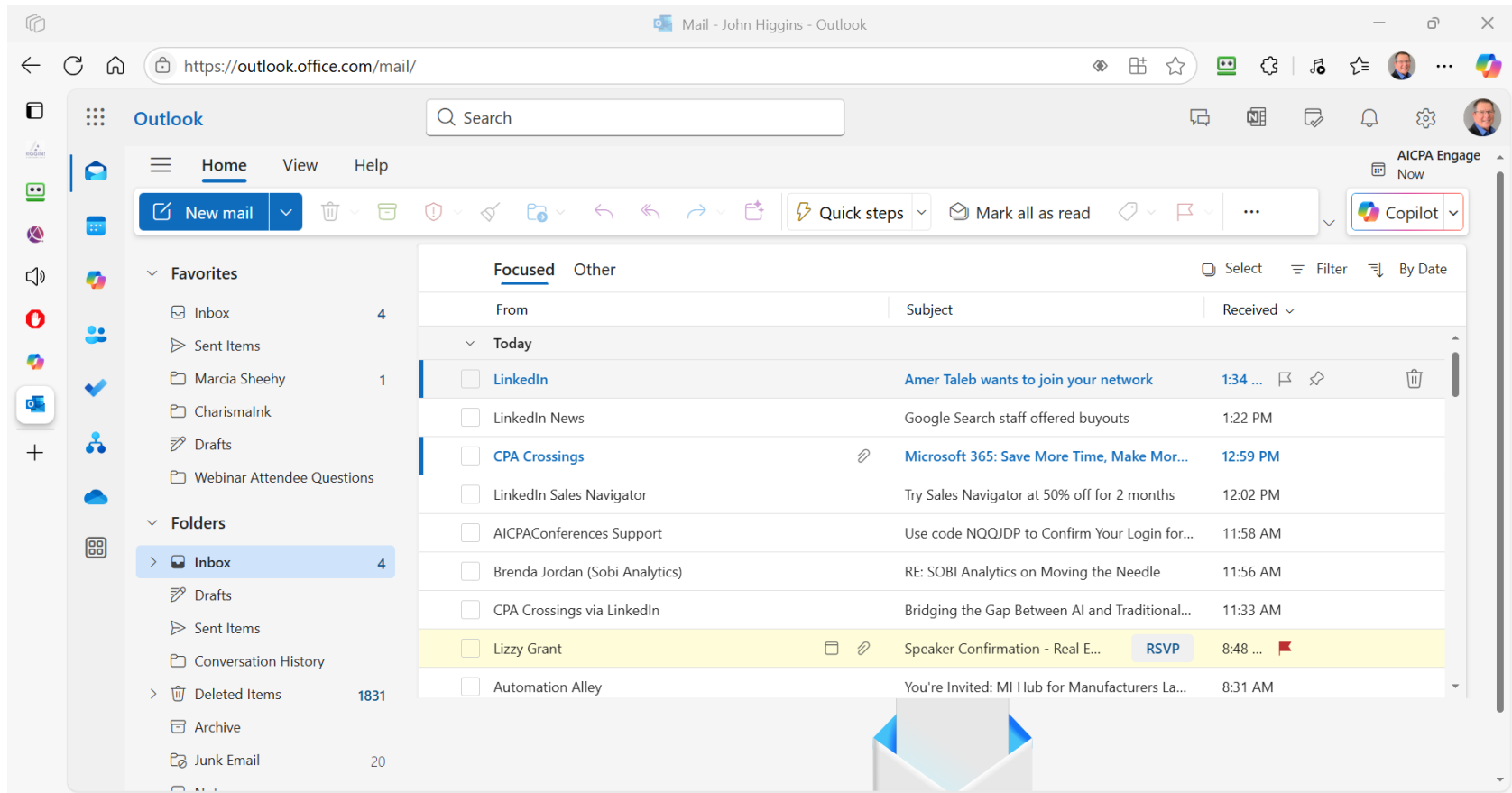
The Microsoft Bookings logo, consisting of a blue square with a white 'B' and a teal square with a white 'B' overlapping it.



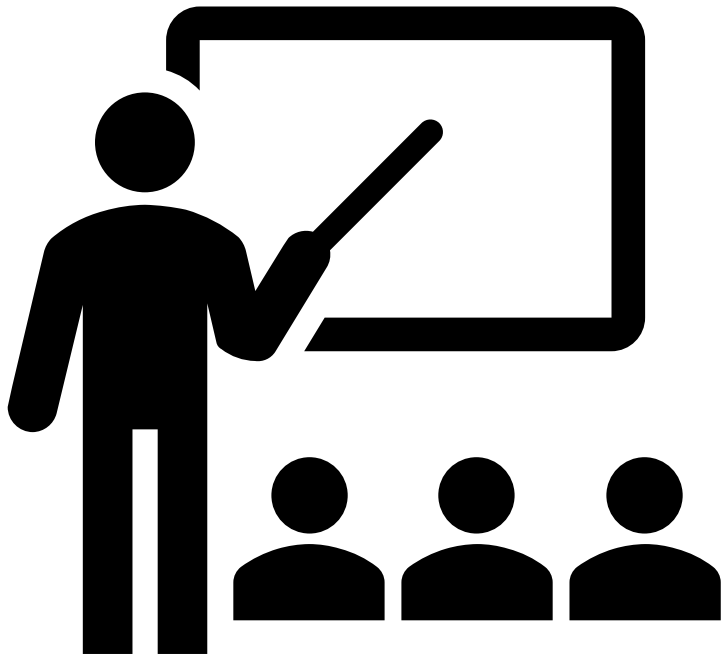
# THE NEW OUTLOOK DESKTOP INTERFACE



# THE OUTLOOK ON THE WEB INTERFACE



# WRAP-UP



# In Summary

- Take time to explore and experiment the features we have reviewed
- Leverage the integrations between Outlook and the other Microsoft 365 apps
- Use Copilot as your “just in time” Outlook tutor

# Questions ?



# Thank you!!!

Let's connect on LinkedIn →

