



AUTOMATE TASKS TO SAVE YOUR STAFF TIME



WELCOME

To our 30-minute webinar





ABOUT THE INFORMATION WE ARE COVERING TODAY

- ◆ Time is the most valuable currency. These are some ideas to help you save time at work.
- ◆ Programs like Power Automate (included in your Office 365 subscription) can tie together digital information for you.
- ◆ Other Microsoft features can help automate repetitive tasks without costing you more money.
- ◆ I will leave time at the end for questions.

ABOUT ME



I'm Colin Pearce (he/him), and I've been managing and troubleshooting technology for businesses since the early 2000s.

I founded my IT support services company, Inderly in 2017. We are local to Toronto and Hamilton, with clients across Ontario.



OUTLOOK/INBOX TASKS

- Forward emails from x to y
- File emails based on sender or subject
- Store attachments to a place on OneDrive/SharePoint
- My Templates can be used for email templates
- Create a poll for conflict checks
- Create a journal (Excel sheet) of all correspondence from person/company for time tracking



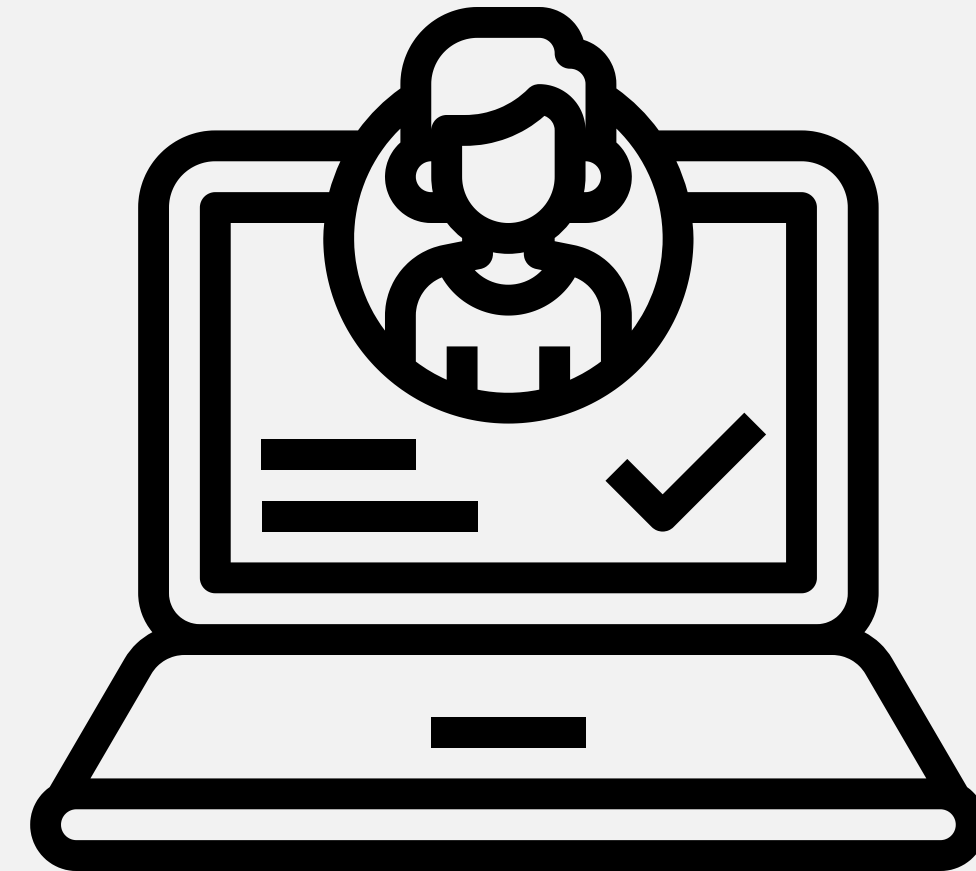


MANAGEMENT TASKS

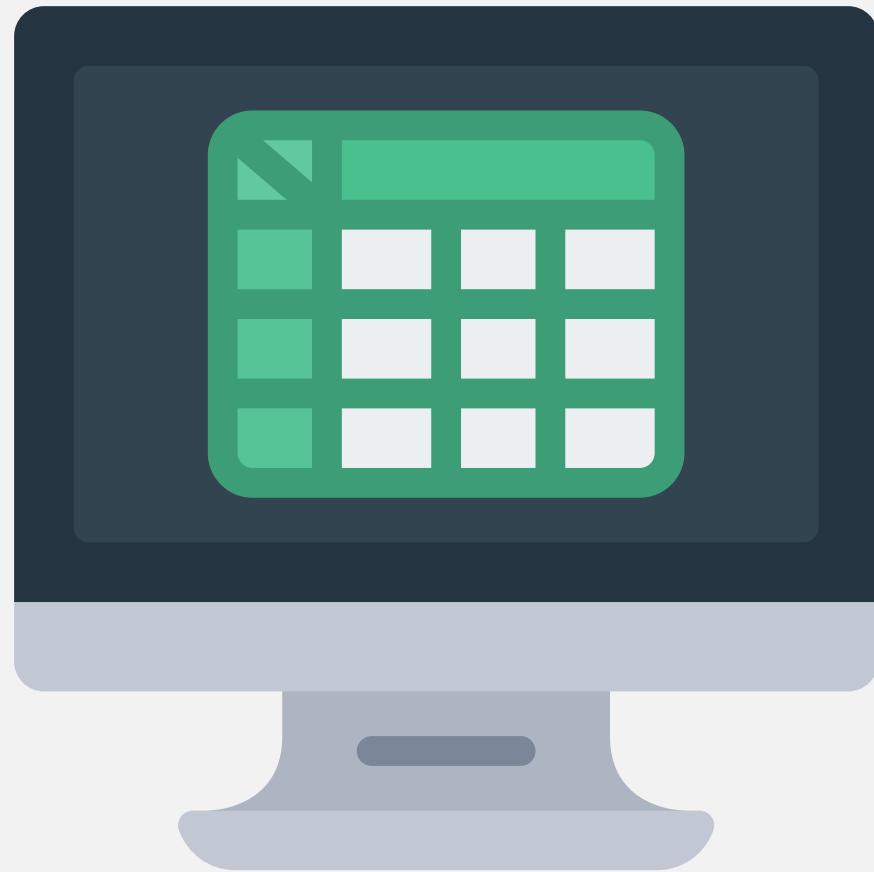
- Set up approvals on documents
- Time off approvals

INTAKE TASKS

- Create forms and save entered info into a spreadsheet or document, or send it to an outside software
- Send automatic replies to interested clients



SOCIAL MEDIA



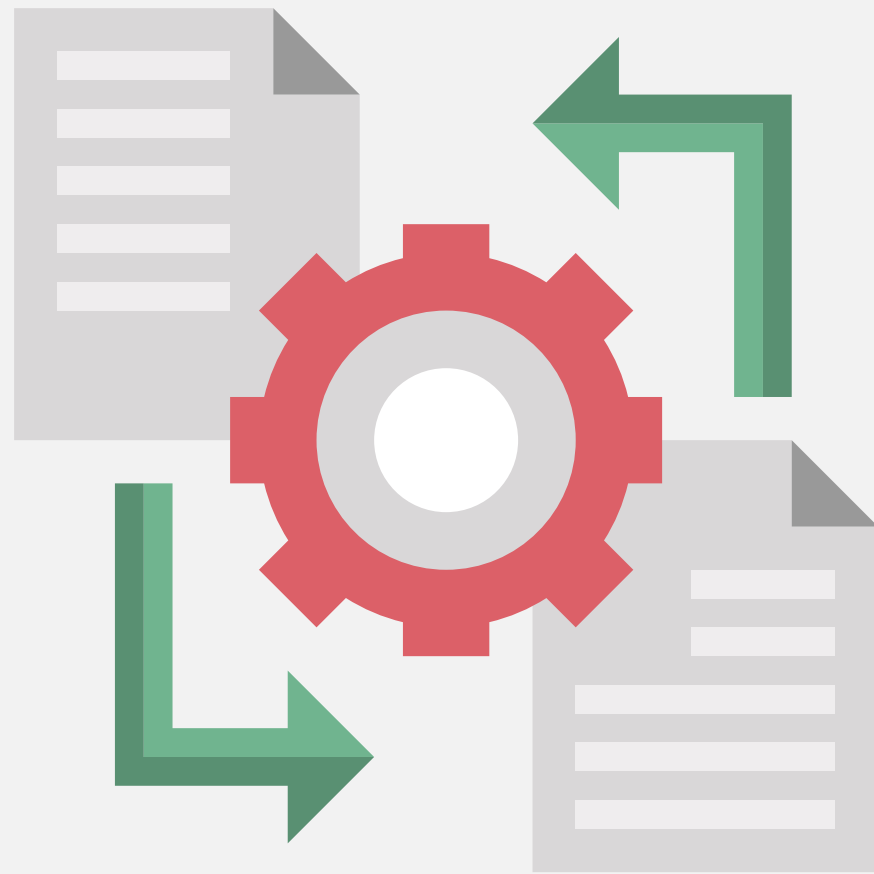
- Use Power Automate to monitor Twitter for specific tweets about clients or files
- Collect tweets meeting criteria into a spreadsheet

MICROSOFT BOOKINGS

- Create a calendar link for individuals or teams so people can book a meeting based on your availability
- Meetings can automatically generate Teams invites



SHAREPOINT/ONEDRIVE



- Collaborate with outside parties on folders or documents
- Use OneDrive file request for each document ingestion

MICROSOFT TEAMS

- Create groups based on matters or clients
- Have alerts posted to the group when new documents are added or changed, or emails received
- Create group emails for shared correspondence
- Create wikis within Teams to share knowledge
- Integrate planner for project planning





THANK YOU



CONTACT INFO



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Book a meeting: www.inderly.com



Toronto and Hamilton