




9 Simple Steps to Get Started

Microsoft Loop Beginner Guide

A fast, friendly guide to help your team:

- +  Stay organized without the overwhelm
- +  Collaborate in real time (yes, really!)
- +  Actually enjoy using Microsoft Loop






What Is Microsoft Loop?

If your notes, tasks, ideas, and conversations **feel scattered across Microsoft 365**, Loop brings them all together in one shared space.

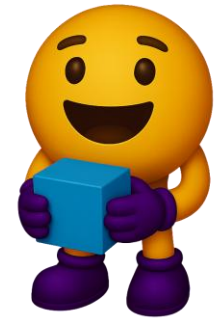
Microsoft Loop is a **digital playground for collaboration**—a flexible space where your team can organize ideas, manage tasks, and work together in real time.

Why You'll Love It:


- +  Pages and components that flex to fit your workflow
- +  Real-time updates across Teams, Outlook, and more
- +  A clean, visual way to keep your work (and brain) organized

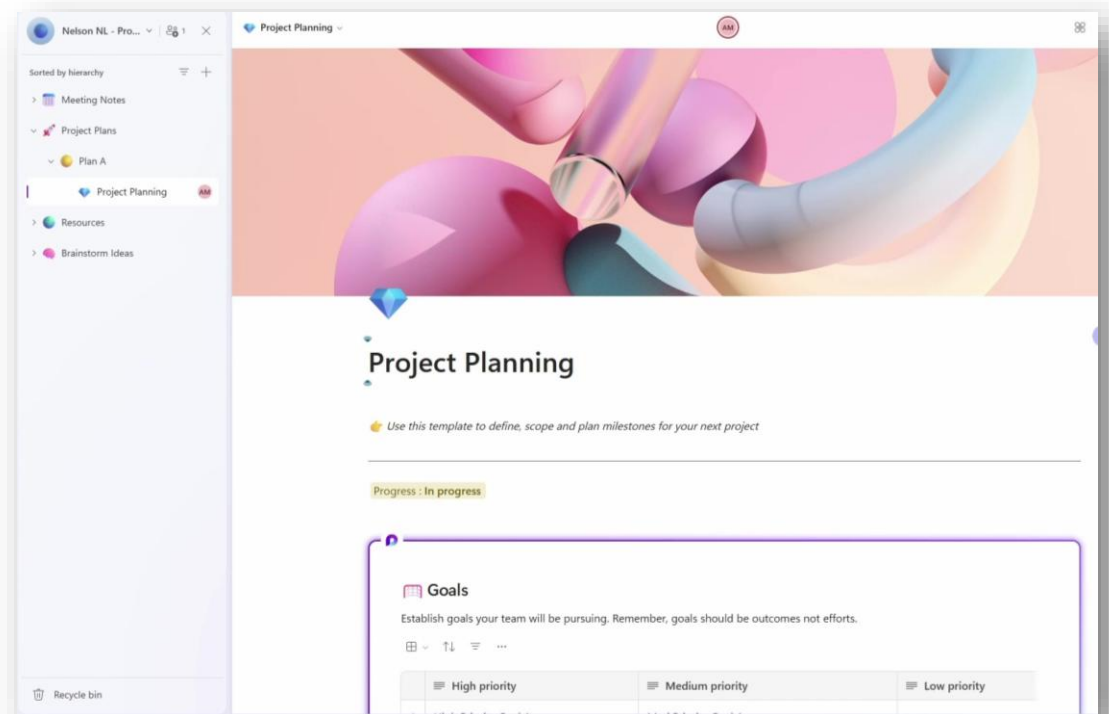


Intro: Building Blocks of Loop



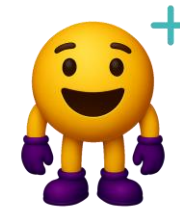
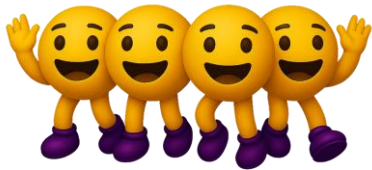
- + **Workspaces** – Digital project rooms for organizing content by topic, client, or team
- + **Pages** – Individual sections within a workspace used to organize notes, plans, and resources
- + **Subpages** – Nested pages that help break down content and keep everything tidy
- + **Loop Components** – Reusable elements like task lists, tables, and checklists that can be shared across Microsoft 365 apps

 **Tip:** Access Loop by visiting loop.cloud.microsoft and signing in with your Microsoft 365 account.



Step 1: Create A Workspace

Loop offers **three types of workspaces** to match how you work:




Teams-Connected Workspace	My Workspace	Standalone Workspace
Created directly inside a Teams channel . All channel members automatically get access.	Personal space created automatically for every user. Includes unique Copilot Pages integration .	Created manually from the Loop app. Ideal for solo projects.

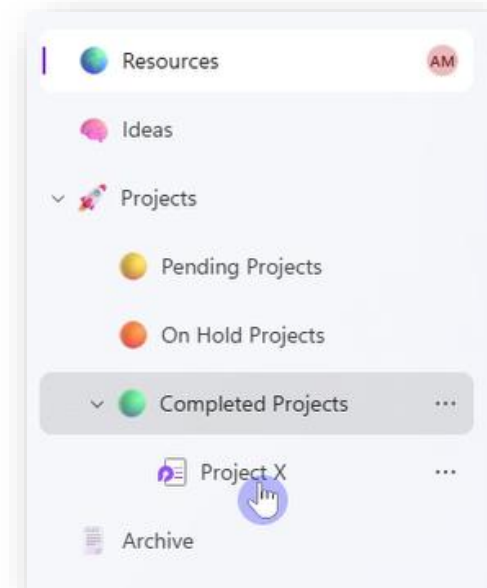
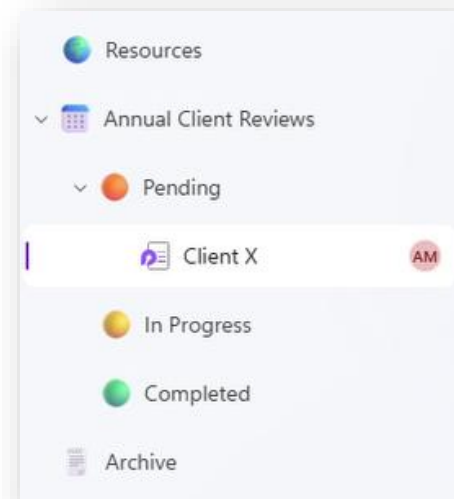
Step 2: Add Pages, Subpages & Resources



Loop pages are like **folders**—use them to organize your content in a way that makes sense for your team.

You can nest **subpages** to keep things tidy.

 **Tip:** Add URL links or files as pages to give your team quick access to important resources.



Step 3: Use / Slash Commands

The **forward slash (/) command** is the most powerful shortcut in Microsoft Loop—it instantly creates structure for your content and helps you build pages fast.

💡 **Tip:** My top 5 slash commands:



/TABLE



/TASK LIST



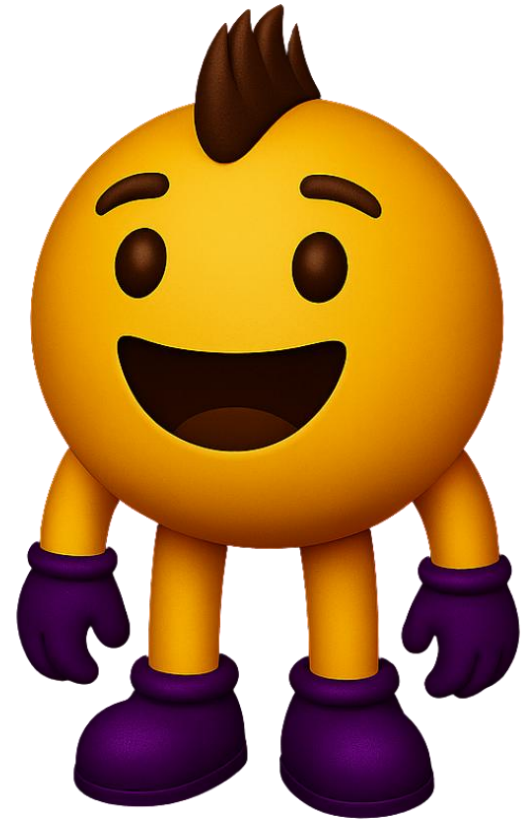
/VOTING
TABLE



/MEDIA




/CODE BLOCK



Step 4: Format Your Content

Loop gives you flexible formatting tools to make your pages **clean**, **scannable**, and **easy to use**.

 **Tip:** Use the shortcut keys shown in the formatting toolbar to quickly style your content without breaking your flow.

+ **Here's what you can add:**



Header	Divider	Checkboxes	Bullet Points	Text Color	Highlight
Project Kickoff Plan	—————	<input type="checkbox"/> Finalize agenda <input type="checkbox"/> Send invites <input type="checkbox"/> Prep materials	<ul style="list-style-type: none">- Key goals- Timeline- Team roles	Blue text for emphasis	Highlight important info

Step 5: Task List

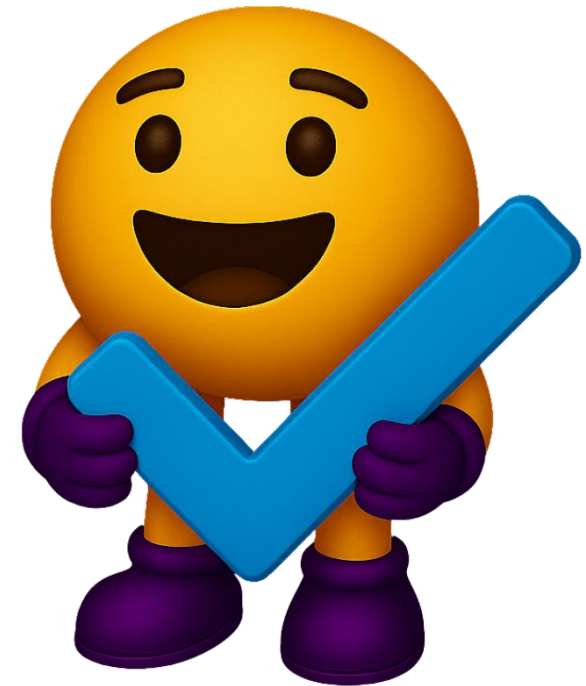
Use the forward slash command **/task list** to quickly add a task list to your page.

- + Tasks sync with **Microsoft Planner and To Do**, so you can manage your work without switching apps.



Tip: Assign a task to yourself or a teammate, add a due date, and use it to track progress right inside your Loop workspace.

Watch: [How to use Microsoft Planner effectively](#)




Step 6: Loop Components


Loop components let you share live, editable content across Microsoft 365—so your team can collaborate without opening a full Loop page.

+ You can drop components into:




 **Outlook emails** — perfect for sharing updates or task lists



 **Teams chats or channel posts** — collaborate in real time, right in the conversation



 **OneNote** — embed components into meeting notes or planning docs

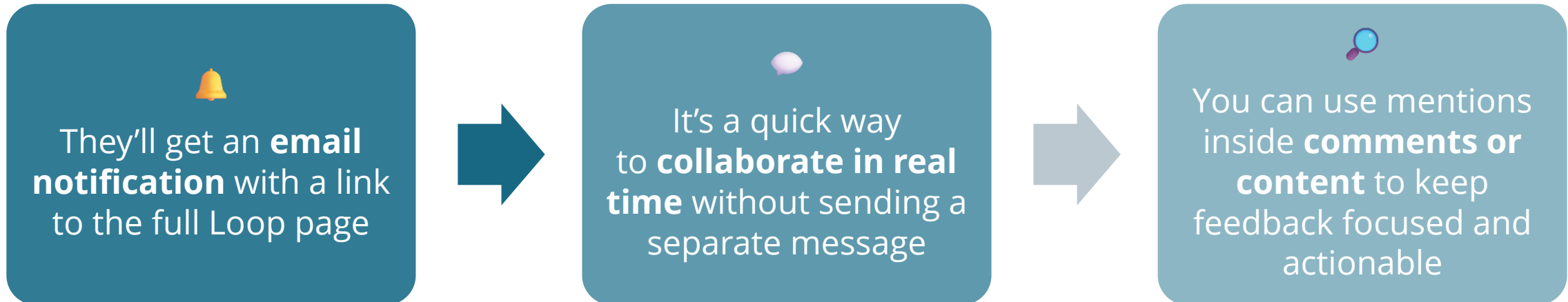


Step 7: @ Mentions

If you struggle to keep track of who said what (and where), or want to **cut down on endless email threads**—Loop’s collaboration features are here to help.

One of the *simplest* ways to bring someone into the conversation is with an @ mention.

What happens when you mention someone:




■ Step 8: Comments

Ever lose track of feedback in long email threads or scattered chats?

Loop makes it easy to keep **discussions focused** and in context—with comments.




Highlight any text—
even inside a table—to
leave a comment




**Start a focused
discussion** right where
the feedback belongs




Use @ mentions inside
comments to notify
teammates and pull
them into the
conversation instantly

Step 9: Templates

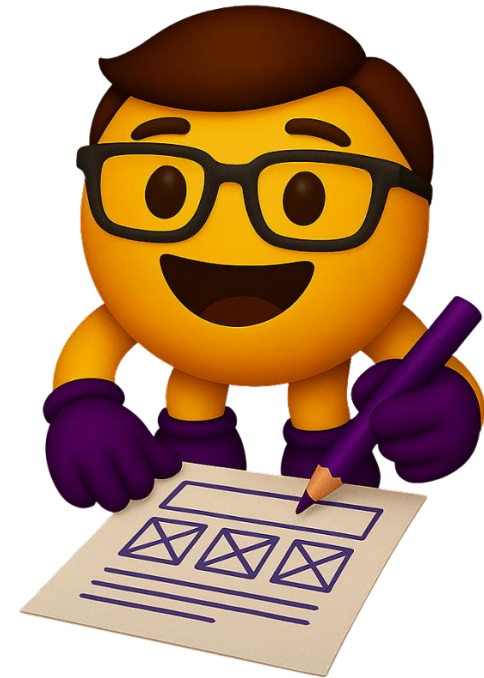
Templates help you keep your Loop pages consistent, professional, and easy to reuse—so you don't have to start from scratch every time.



Use **pre-defined templates** from the gallery when creating a new page



Create your own layout and **save it as a custom template**





You're Ready for What's Next!

+ You now know **9 simple steps to get started using Microsoft Loop**—nice work!

NEXT STEP:

Take the full Microsoft Loop course:

- ✓ Use one app for your notes, tasks and conversations
- ✓ Simplify your workflows with practical strategies
- ✓ Build confidence using Loop through actionable lessons

 [Explore the course here](#)

I will see you in the next video!

- Your nerdy office friend, Amy 🤓

