

11 best tips to get started with Microsoft Loop

Microsoft Loop is finally available in public preview this month. Loop is Microsoft's new age collaboration and database solution with a modern and intuitive drag-and-drop editor, similar to Notion.

Loop aims to make collaboration more efficient by coordinating all tasks, documents, and teams. Most importantly Loop is a web based application. Additionally, the Loop mobile app is available for Android while Loop for iOS is still in beta testing. Here are some tips to help you get started with Microsoft Loop.

What is Microsoft Loop?

Microsoft Loop brings your notes, tasks, projects, and documents together. You can create workspaces, add pages, and share them with team members for seamless collaboration. The best part is that you don't have to switch between different apps to check project tasks, content and updates.

If you've used software like Notion and Coda before, you'll find using Microsoft Loop very easy. However, if you're a fan of Evernote, Trello, and Asana, getting used to Loop may take some time.

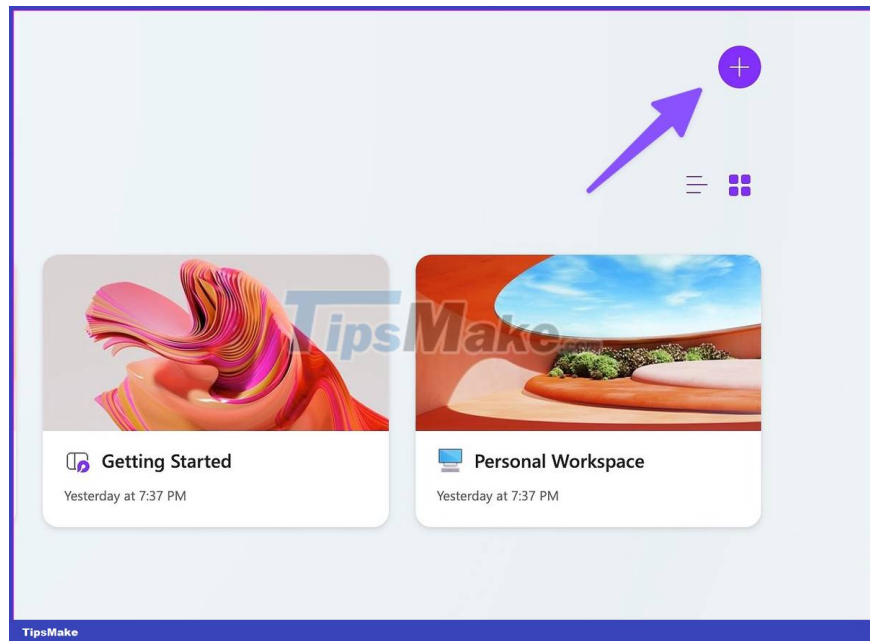
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1. Create workspaces and manage pages

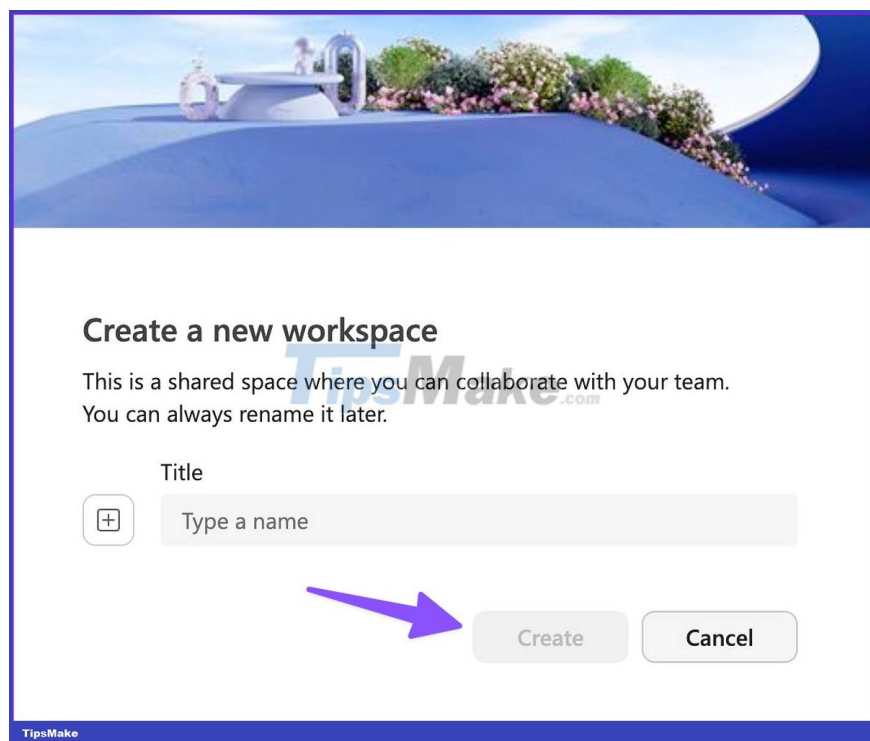
Content organization is a bit different on Microsoft Loop as it tends to focus on co-creation and collaboration. First you need to create a workspace and add pages to it. You can also add subpages to a master page for better management.

Step 1 : Go to the Microsoft Loop homepage and sign in with your Microsoft account details.

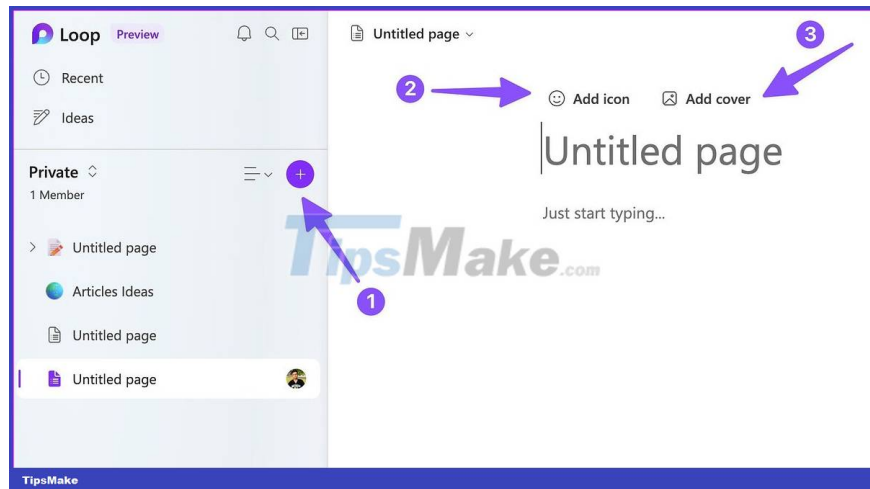
Step 2 : Click the + icon in the upper right corner.



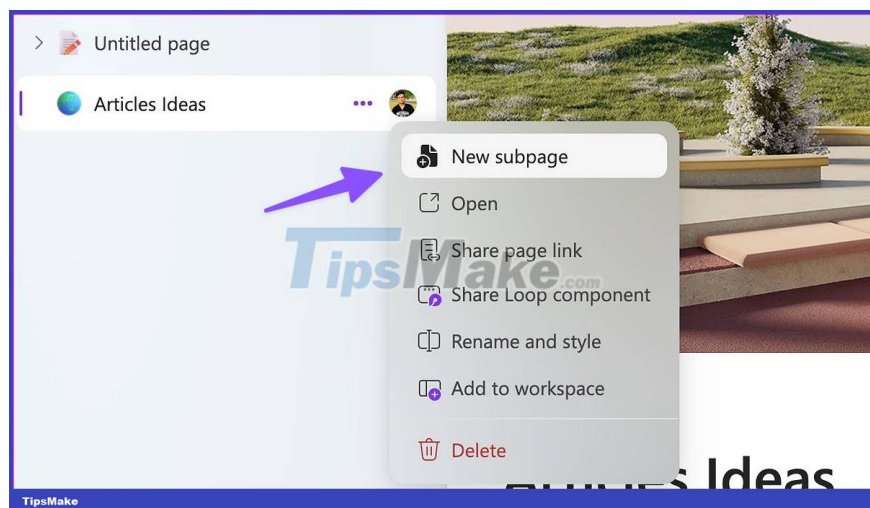
Step 3 : You can add cover photo, emoji and title. Click **Create**.



Step 4 : Go to your workspace and select + from the left sidebar to add a new page. You can add an icon and cover page for each page for better differentiation.



Step 5 : Right-click on the three horizontal dots menu next to a page and select **New subpage** to add a subpage.

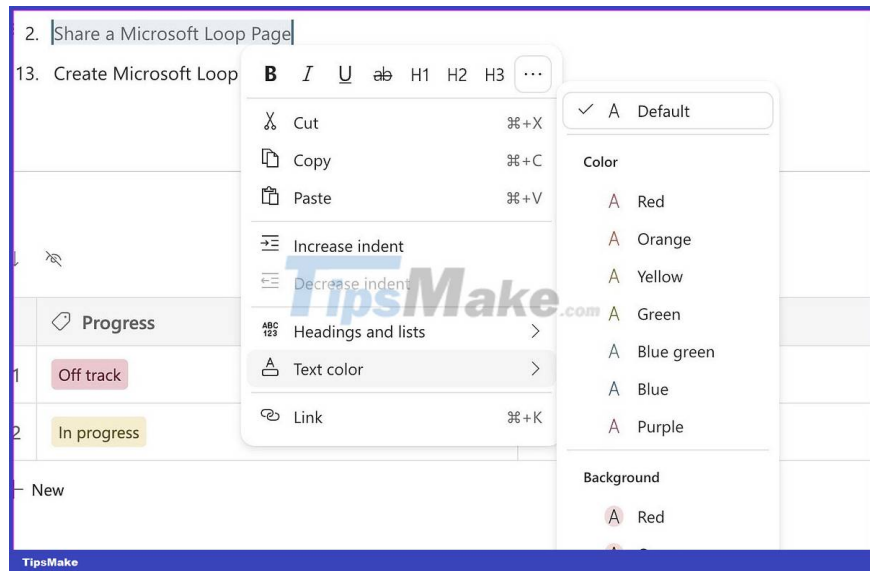


For example, if you create a company roadmap for 2023, you can name the new page **2023** and add the months as subpages.

2. Explore text editing options

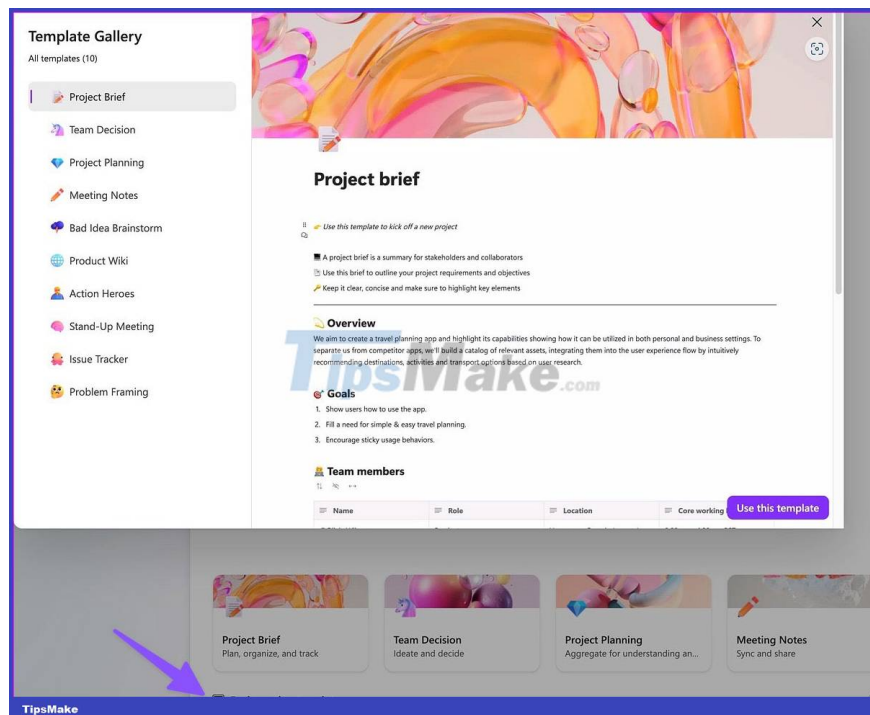
Microsoft Loop does not come with a standard toolbar like OneNote or Word. It is hidden in the **/ command**. You can enter **/** and add titles, tables, checklists, bulleted lists, number lists, and separators.

If you want more options, select the text or paragraph and right-click it. You can add bold, italic, and underline effects, and change the text and background color.



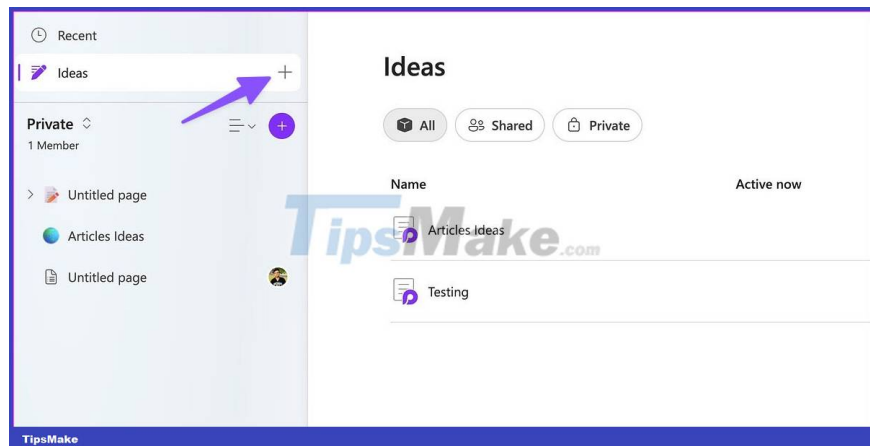
3. Check out Microsoft Loop templates

You don't need to create a page from scratch in Microsoft Loop. You can explore some of the available templates to get started quickly. Microsoft provides 10 templates to choose from. You can even delete template content and keep relevant information on the page, such as tables and headings. Compared to Notion templates, the current selection in Microsoft Loop is quite limited.



4. Record ideas

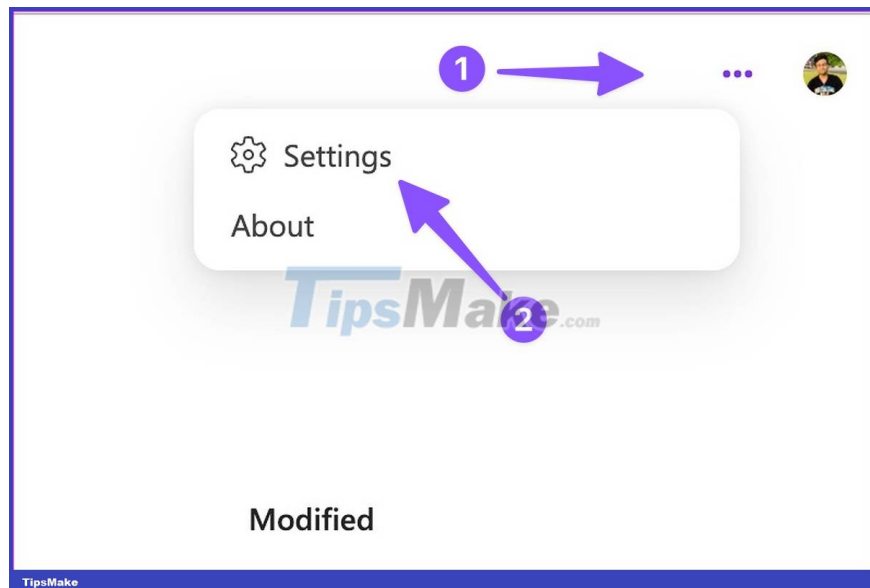
Microsoft Loop comes with a dedicated **Ideas** section to quickly jot down ideas. You can open the **Ideas** menu and add pages and subpages to it. **You can always move pages from Ideas to workspaces in the Loop later .**



5. Use dark themes in Microsoft Loop

Loop comes with the ability to enable dark theme to reduce eye strain.

Step 1 : Click on the three horizontal dots menu in the top right corner and open Settings.



Step 2 : Select **Dark theme** .

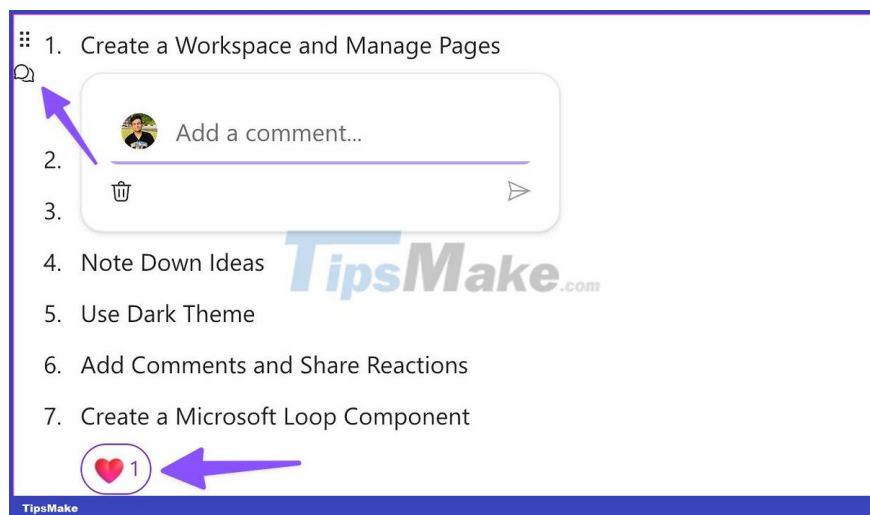


6. Add comments and share reactions

You can add comments and share reactions to any content on the page. That prevents creating a separate page or linking together, while keeping all relevant reactions and comments in one page.

Step 1 : Select any content on a page and click on the small comment (chat bubble) icon.

Step 2 : Select a comment and enter your answer. You can also add reactions on the page.

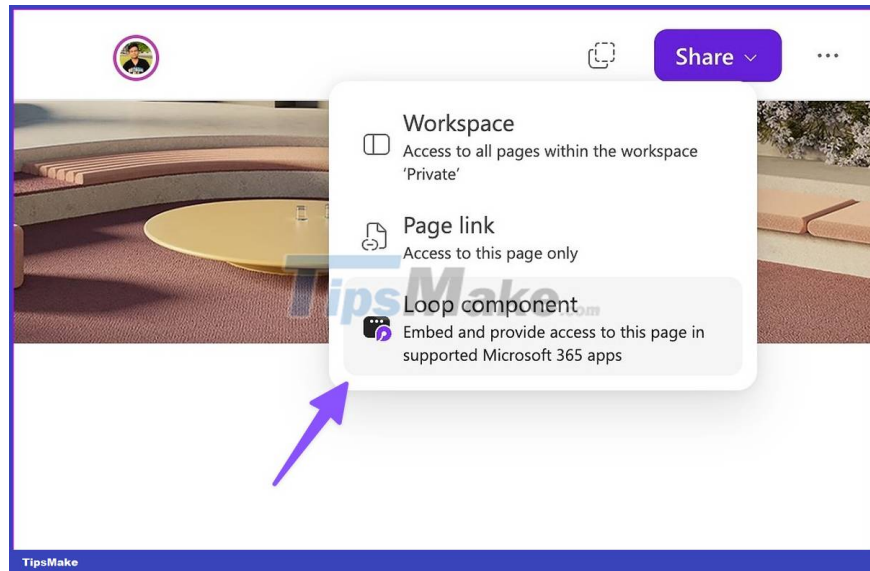


Step 3 : Furthermore, group members can expand a comment and add a reply to it to create a threaded conversation.

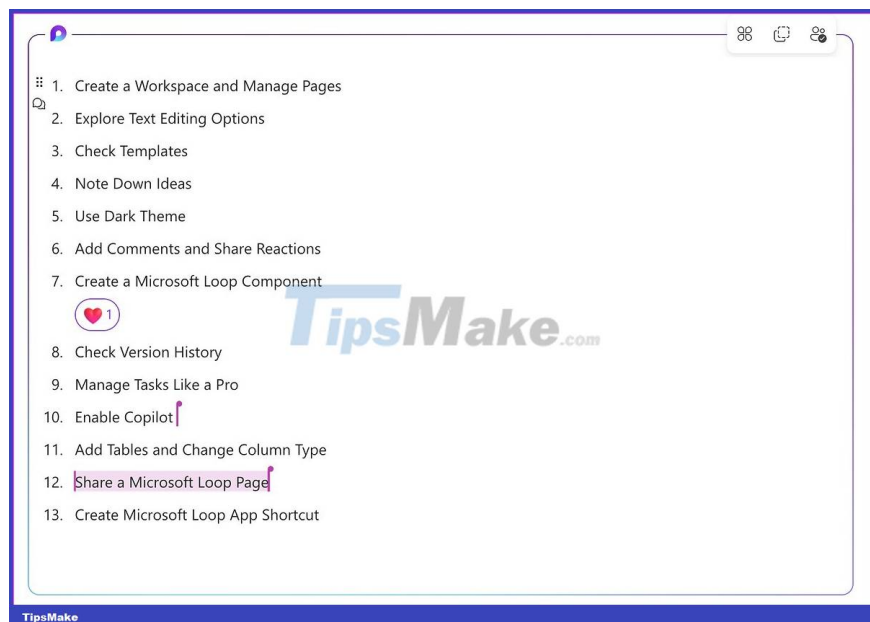
7. Create Loop Component

Loop Component is another handy add-on from Microsoft. You can create a Loop Component and share the same content on other pages. As you edit those elements, Loop makes the changes to all of the content. You can also share Loop Components on Microsoft 365 apps.

Step 1 : Open the Loop page and click **Share** in the top right corner. Click **Loop Component**. The app generates a link to share.

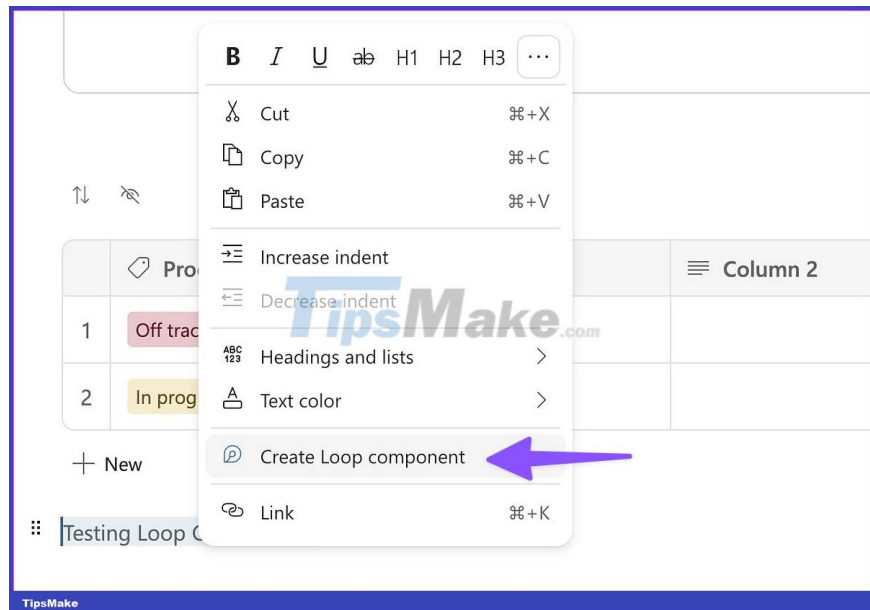


Step 2 : Paste the link on Microsoft Teams or another Loop site.



Step 3 : If you want to share specific content, select and right-click on it.

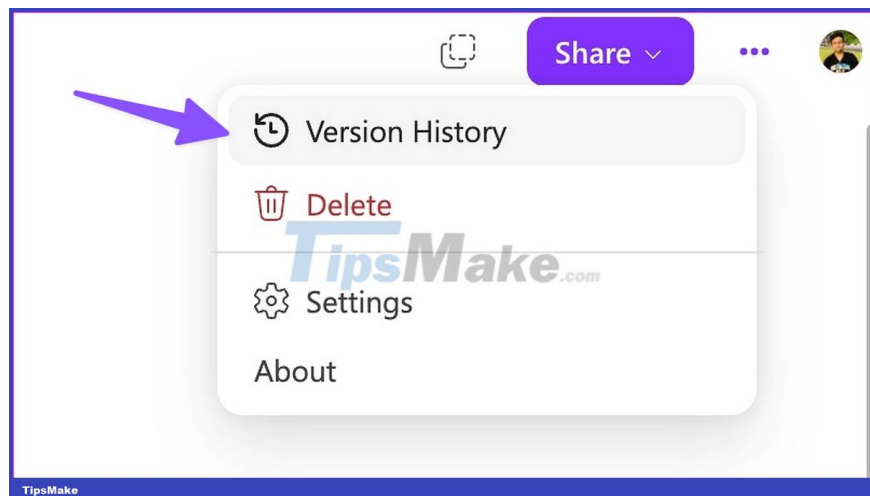
Step 4 : Select **Create Loop component** and copy the link.



Microsoft plans to support Loop Components across Teams, Word, OneNote, and other Microsoft 365 apps in the future.

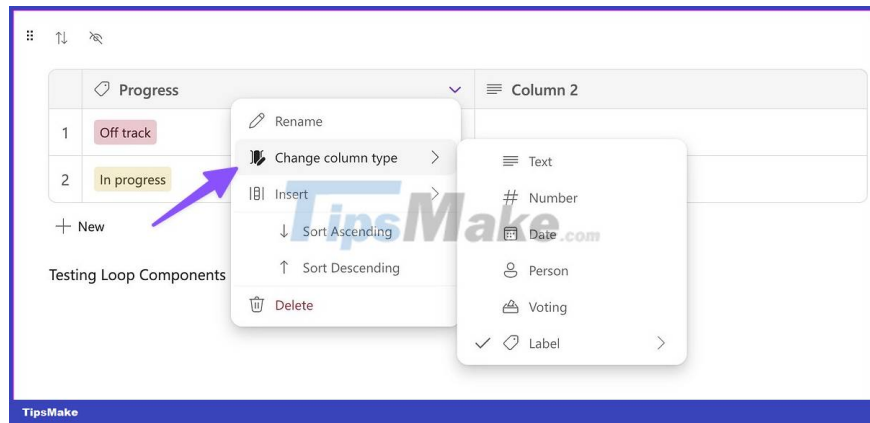
8. Check version history

You can always check the version history of a page and revert the changes or restore the old page. You can click on the three-dot menu at the top and select **Version History**.



9. Add tables and change column types

Tables get a major overhaul in the Loop. You can add a table using the / command and change the column type according to your preference. Simply expand the column menu and change the column type to text, number, date, person, vote, or label.



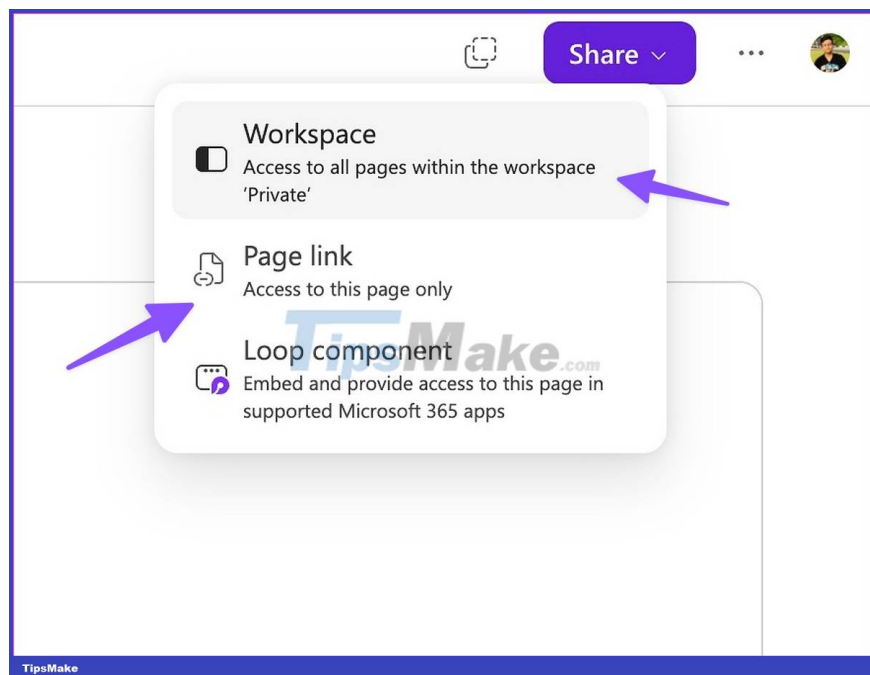
You can also add some ready-to-use databases, such as task lists, voting boards, or progress trackers.

10. Share a workspace or Microsoft Loop page

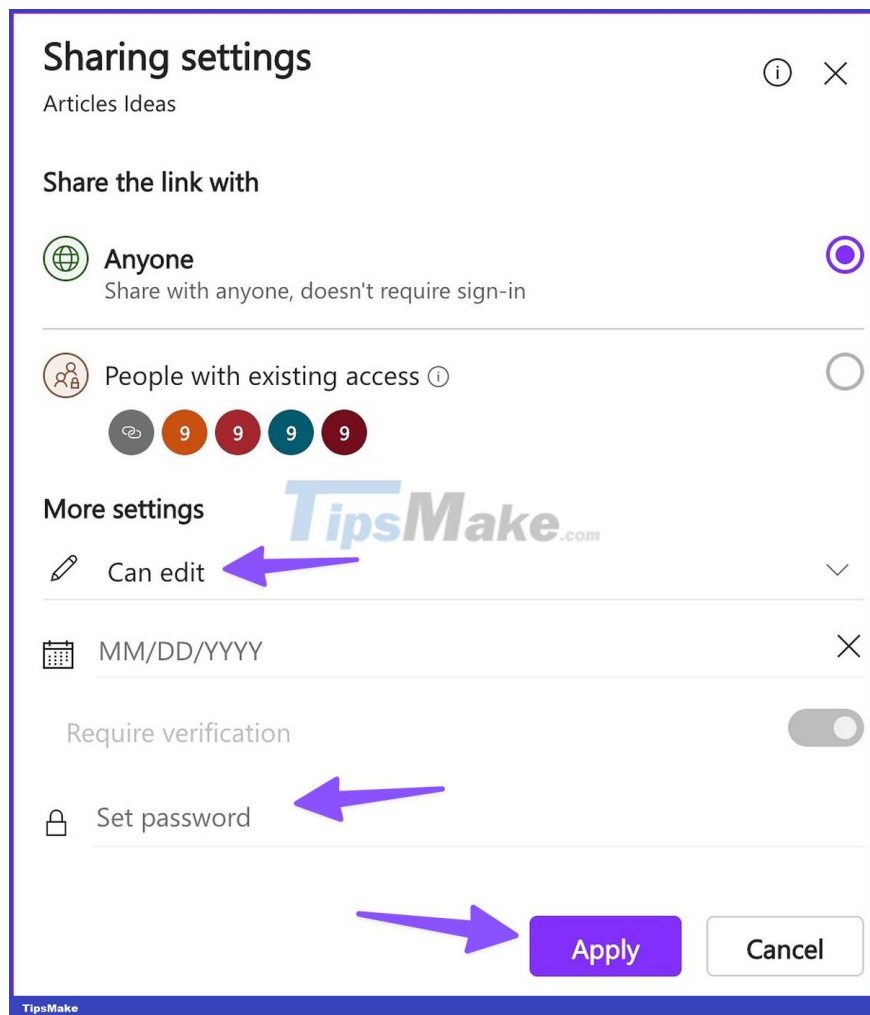
You can share an entire Loop workspace or a specific page (and subsites).

Step 1 : Open any page in Microsoft Loop and click **Share**.

Step 2 : Click **Workspace** and invite up to 50 members.



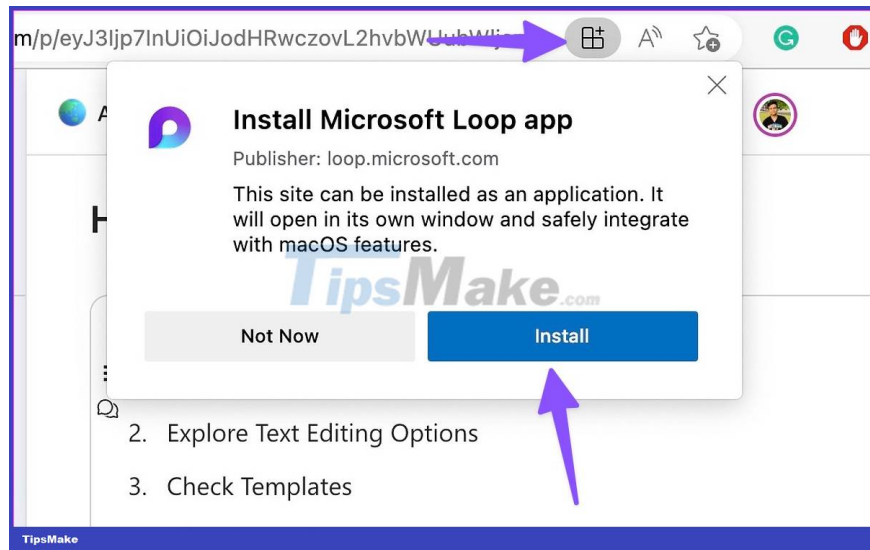
Step 3 : You can also share the page link and set editing permission.



Loop allows you to add a password and an expiration date to prevent unauthorized access to a page.

11. Create a Microsoft Loop application shortcut

Although Microsoft Loop is only available on the web, you can install an app shortcut on your PC or Mac. You should find the application shortcut icon in the address bar and click on it. Choose **Install** and access Loop with a single click from the Taskbar or Mac Dock.



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