

# Getting Started with Business Contact Manager

Session Length: 2 hours

## What is Business Contact Manager?

**Business Contact Manager** is a powerful contact and customer information management feature of Outlook.

## When to use

Use Business Contact Manager to manage your business contacts, track opportunities through the sales cycle, send personalized marketing campaigns, and organize your business projects.

## Who should attend

This course is designed for those interested in learning how easy it is to keep track of your business contacts and accounts.

## Prerequisites

Students should be familiar with using personal computers, and have used a mouse and keyboard. They should be comfortable with the Windows environment and be able to use Windows to manage information on their computers. Specifically, they should be able to launch and close programs; navigate to information stored on the computer; and manage files and folders.

## Overview

### Get to know Business Contact Manager in Outlook

- The why and the where
- More ways to see your data
- See or change the database

### Practice

Test yourself

### Build a central resource of Contacts, Accounts, and Opportunities

- Use the Business Contact and Account forms
- Accounts and contacts: they're related
- Remember history: your link to success
- Add to the history on your own
- Add e-mail to the history automatically
- Target your efforts with reports

### Practice

Test yourself

### Make the move

- Contacts in Outlook: to move or copy
- When your contacts are not in Outlook



- Map your fields when you import

### **Practice**

Test yourself

