

# Microsoft Business Contact Manger

Live, On-line, Instructor-Led Training Sessions  
*Each individual session is 2 hours long*

## Setting up Accounts, Contacts and Customised Fields

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- **An Introduction to Business Contact Manager**  
*Accurately distinguish the extra facilities added to Outlook by Business Contact Manager.  
Understand how Business Contact Manager stores data.*
- **Sharing BCM data and Databases**  
*Share BCM databases and manage multiple BCM datasets.  
Work with BCM data offline on Laptops and Mobiles*
- **Accounts and Contacts**  
*Understand how Accounts and Contacts relate to each other and Outlook Contacts  
Add, search and maintain Accounts and Contacts*
- **Customised Fields**  
*Extend the data held in Business Contact Manager with customised fields.  
Sort, Search and Report on customised fields*

## Opportunities, Marketing and Data Management

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- **Using Opportunities and Projects**  
*Use opportunities and Projects to track pre-sale opportunities, and manage Tasks and Projects*
- **Autolinking Existing Emails**  
*Use the “manage email autolinking” facilities in Business Contact Manager to build histories based on existing email data.*
- **Create Marketing Campaigns**  
*Create email and mailshot marketing campaigns to contacts, an/ or leads.  
Generate general campaigns  
Link marketing campaigns to leads and opportunities*
- **Creating Business Histories**  
*Link Email, Tasks and Diary items to Accounts, Contacts, Opportunities and Projects.  
Use the Email Auto-link and Link to record menu icons  
View and manage Business Histories linked to Accounts, Contacts, Opportunities and Projects*