

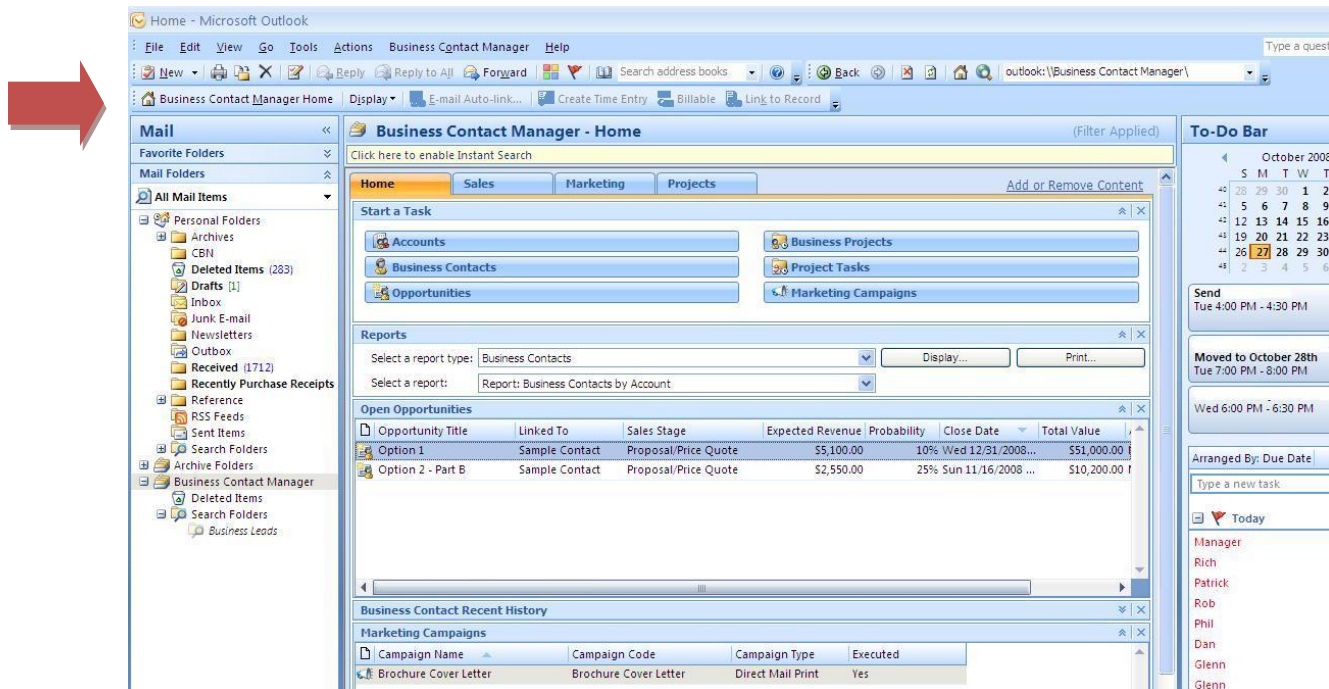
Business Contact Manager

BCM is an entry level CRM (customer relationship management) program that works with Microsoft Outlook®. It is FREE and available to those who have installed Microsoft Office professional, small business, or ultimate versions 2003 or 2007.

Who should use Business Contact Manager?

- 1) CEO who wants to keep track of what his salespeople are doing and how customers are being treated.
- 2) Salesperson to make sure she's following up on all her prospects.
- 3) Small business owner who wants to separate personal and business contacts and/or clients from leads.

You may have to activate the product if you do not see the BCM toolbar (3rd from the top). In Office 2007, select File – Data File Management. Click the Data Files tab. Click Add button and select Business Contact Manager Database.



An excellent book describing how to use BCM is “Outlook 2007 Business Contact Manager for Dummies” by Karen Fredricks and Lon Orenstein.

BCM is actually stored in a SQL Express database so it can be larger than a typical Outlook contacts database. It can also be stored instead on a network server for using across a shared network or synchronized with a mobile device or laptop.

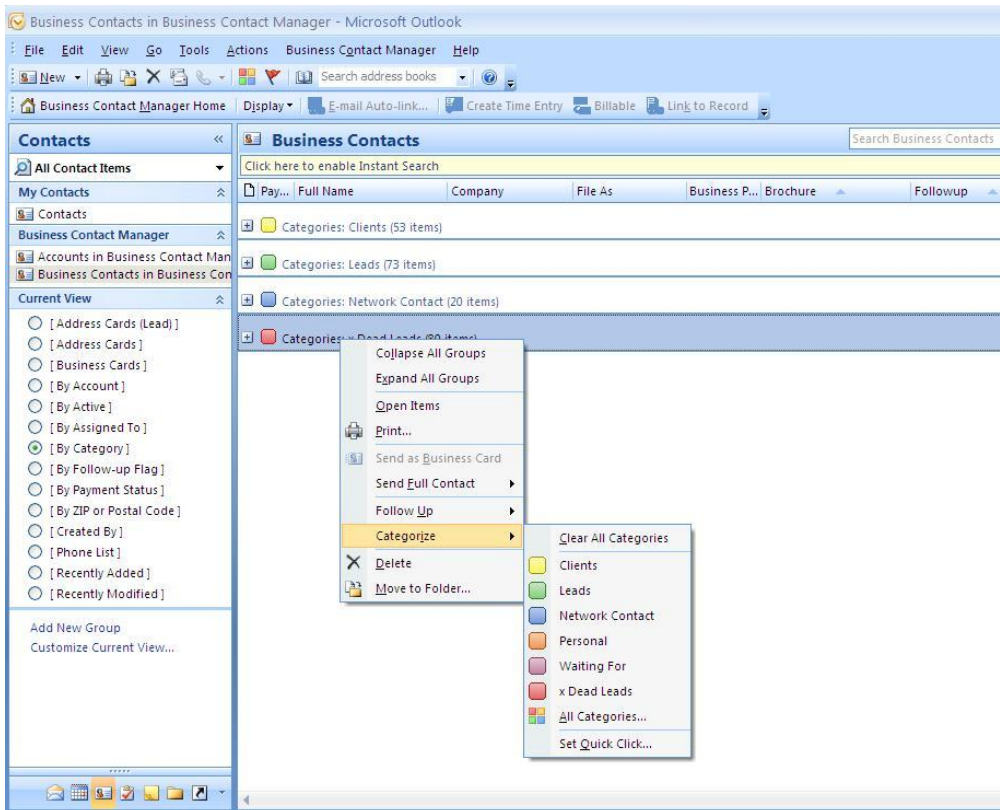
Key Elements

Accounts (companies)

Contacts (people) – one or more per account

Separation from My Contacts in Outlook

** Categories – to organize contacts and/or personal mail items

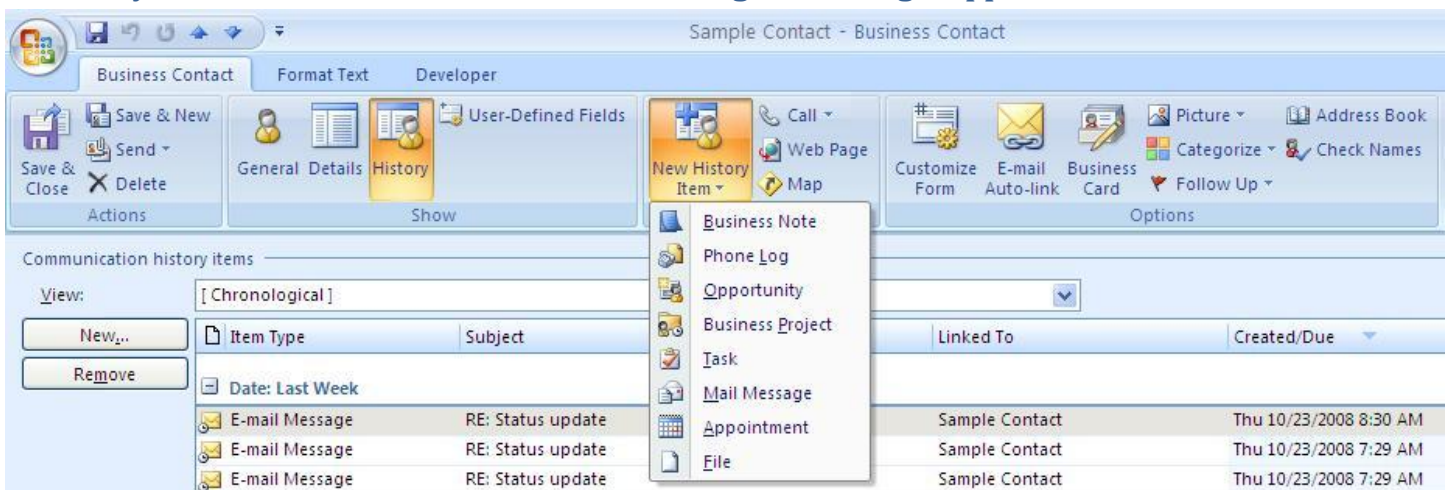


** Customized fields

** Managing Your Calendar – schedule or link an appointment to a contact

** Creating a task linked to a contact

** History information for a contact: E-mail Messages, Meetings, Opportunities, Files



**** Creating Opportunities for sales**

**** Integrating with Microsoft Small Business Accounting – turn opportunity into quote, sales order, then finally an invoice. You can submit time entries from calendar (by linking calendar entry to Account) for invoicing.** Express version of Small Business Accounting is also free see www.ideawins.com

**** Merge with Word – Use Outlook Business Contacts as mail merge inputs**

**** Marketing Campaigns – Email, Direct mail print (Word), Telemarketing for a contact subset. By using contact “Initiated By” field you can track success of marketing campaign.**