

## Microsoft Office 2007 Business Contact Manager 3

1 Day

### Prerequisites

- MS Outlook 2007 Basic or commensurate knowledge and experience

### Objectives

Per the specified learning objects identified in the outline

#### Section 1: Configuring Business Contact Manager

##### **Lesson 1.1: Getting Started**

- What is Business Contact Manager?
- Installing Business Contact Manager
- Using Express Setup
- Using Advanced Setup

##### **Lesson 1.2: Using Business Contact Manager**

- Using the Business Contact Manager Dashboard
- Viewing Business Contact Manager Folders
- Using the Business Contact Manager Menu
- Using the Business Contact Manager Toolbar

##### **Lesson 1.3: Working with Business Contact Manager Data**

- Creating a Database
- Removing a Database
- Connecting to a Shared Database
- Sharing Your Database
- Managing Your Database

##### **Lesson 1.4: Getting Help in Business Contact Manager**

- About the Welcome E-Mail
- Using the Dashboard Links
- Using "Learn About Business Contact Manager"
- Using the Help Menu

#### Section 2: Using Business Contact Manager

##### **Lesson 2.1: Accounts**

- Opening the Accounts Folder
- Creating New Accounts
- Editing an Account
- Account Views

##### **Lesson 2.2: Business Contacts**

- Opening the Business Contacts Folder
- Creating a Business Contact
- Editing a Business Contact
- Business Contact Views

##### **Lesson 2.3: Opportunities**

- Opening the Opportunities Folder
- Creating an Opportunity
- Editing an Opportunity
- Opportunity Views

##### **Lesson 2.4: Business Projects and Project Tasks**

- Opening the Business Projects and Project Tasks Folders
- Creating a New Project with Tasks
- Editing Business Tasks and Projects
- Viewing Business Tasks and Projects

##### **Lesson 2.5: Communications History and Linking**

- Creating a History Item
- Creating a Business Note in an Item
- Creating a Business Note Outside an Item
- Viewing the Communication History Folder
- Using Link to Record
- Using E-mail Auto-Linking

## Microsoft Office 2007 Business Contact Manager 3, continued

### Section 3: Business Contact Manager Tools

#### ***Lesson 3.1: Customizing the Dashboard***

- Opening the Dashboard
- The Home Tab
- The Sales Tab
- The Marketing Tab
- The Projects Tab
- Customizing the Dashboard

#### ***Lesson 3.2: Information Management Tools***

- Setting up the Product and Service Items List
- Using the Product and Service Items List
- Importing Data
- Exporting Data
- Generating Reports
- The Reports Window

#### ***Lesson 3.3: Marketing Campaigns***

- Creating a Basic Campaign
- Tracking Campaign Results
- Creating a Campaign through Word
- Creating a Campaign through Publisher

#### ***Lesson 3.4: Customizing Forms***

- Creating a Custom Form
- Editing Lists in a Form
- Editing Lists Outside a Form

#### ***Lesson 3.5: Working with Accounting Express***

- Installing Account Express
- Opening Accounting Express
- Setting up a Connection to Accounting Express
- Using the Accounting Tools Menu