

# Outlook 2010 with Business Contact Manager

## Features & Benefits

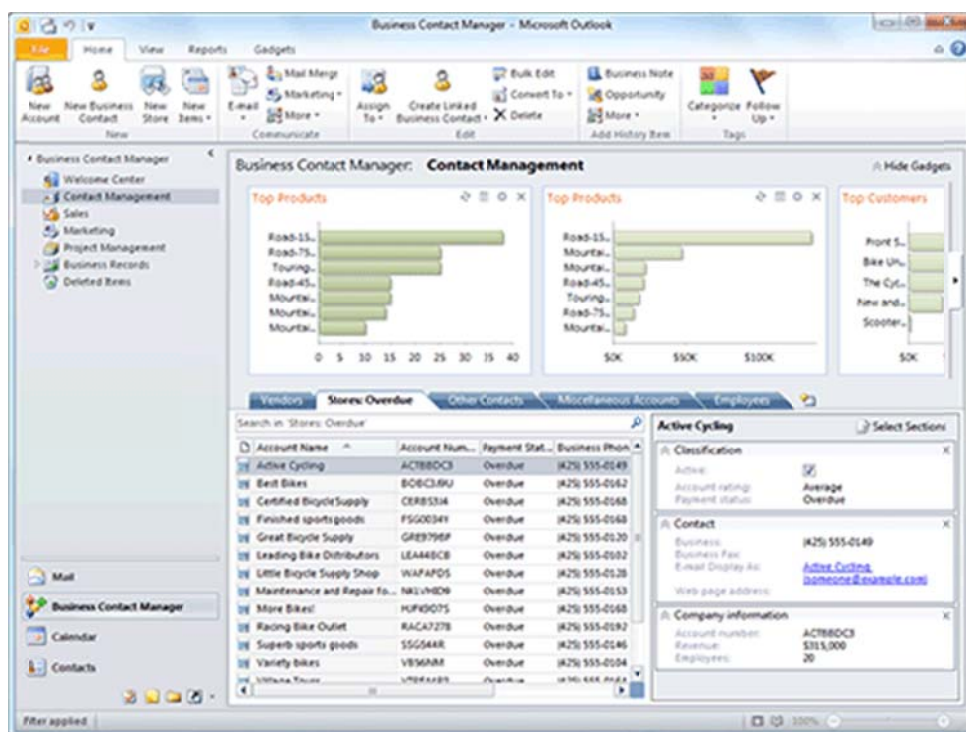
Microsoft Outlook 2010 with Business Contact Manager provides powerful customer and contact management to improve the effectiveness of your sales, marketing, and customer service efforts.

With a new interface, new project management and marketing tools, and powerful customization, Business Contact Manager for Outlook 2010 lets you manage all of your organization's customer information within Outlook, the application you already use for e-mail and calendaring.

### Manage your customer information

Keep all your customer information organized and accessible.

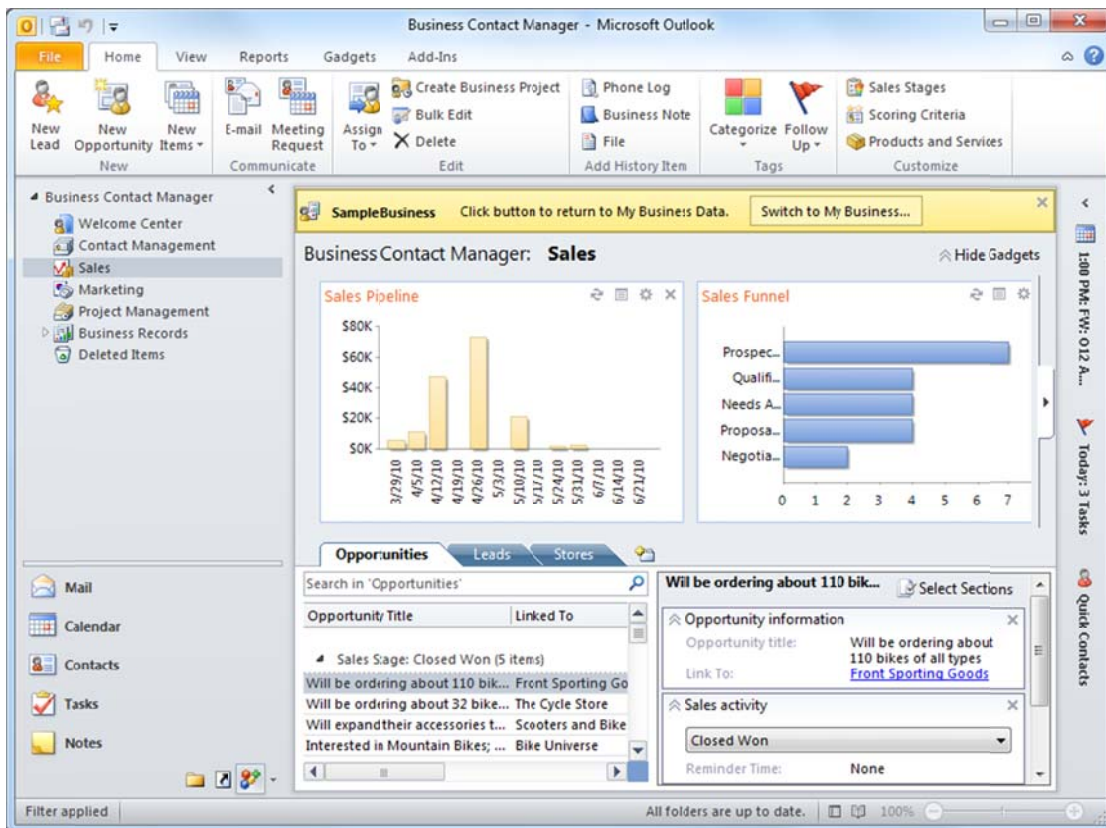
- **Consolidate customer information.** Keep all information related to your contacts, including e-mail messages, appointments, and documents in a single place, enhanced by the stability and performance of a SQL database. Information is accessible using the familiar Outlook user interface, so very little training is required. Create custom tabs and apply filters to show only those contacts relevant to your business needs.
- **Link and track e-mails.** Automatically link e-mails received from or sent to each customer.
- **Share customer information with colleagues.** Create Share contact and sales information with those in your team who need it. When a potential customer calls, your salespeople have the information they need to close the sale.
- **Synchronize Business Contacts with Outlook, SharePoint, or Windows Live Contacts.** View and edit your Business Contacts from anywhere you can access Outlook Contacts. Bidirectional Synchronization between Business Contacts and Outlook Contacts ensure that both copies are always up-to-date.
- **Stay connected when you are out of the office.** When you're on the road, you can work offline on your portable computer, and then synchronize information when you return.



## Manage your sales activities

Follow up quickly and easily on sales leads and opportunities.

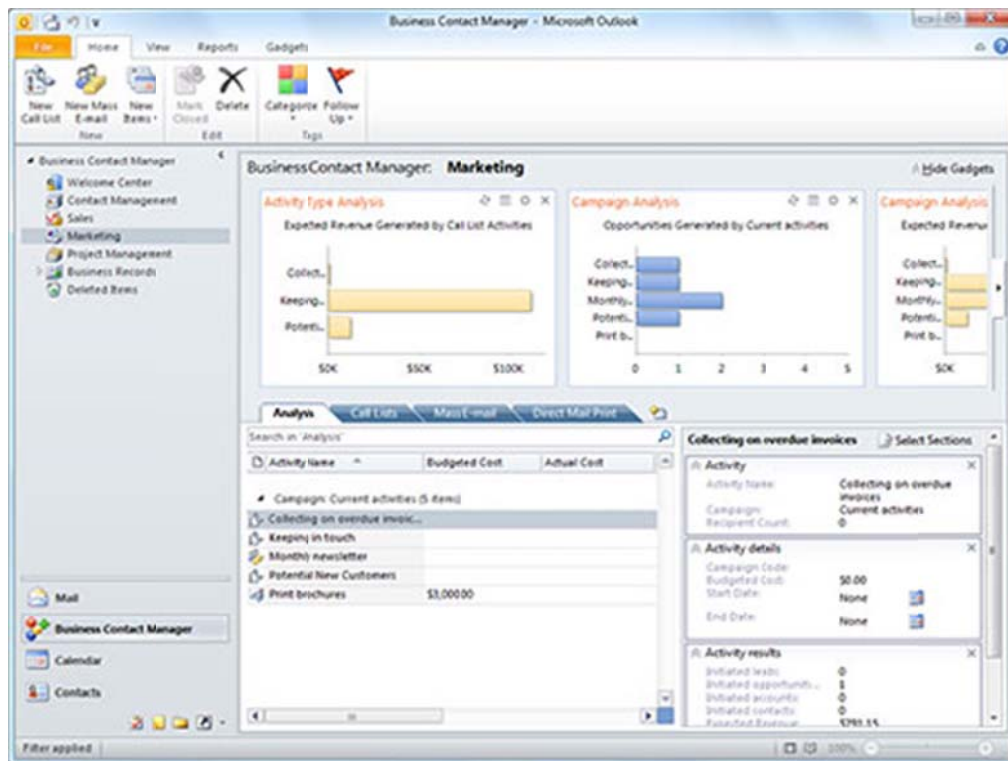
- **Manage sales leads.** Automatically prioritize your leads according to rules you set up so that you can pursue the most important leads first.
- **Stay on top of sales opportunities.** Create sales stages and activities that fit your business practices. As you complete each activity, Business Contact Manager sets a reminder in Outlook for the next activity in the series.
- **Identify your top customers and products.** Keep track of your top customers and best-selling products so that you can give them the attention they deserve.
- **Forecast sales and prioritize tasks.** Use the dashboard to keep track of your company's sales pipeline and sales funnel. Easily forecast sales and prioritize your sales efforts.
- **Analyze your data.** Use any of 72 predefined reports, or create and share customized reports that contain exactly the data you need. Export reports and their formatting and formulas to Excel for deeper analysis.



## Create and track your marketing activities

Create and distribute personalized marketing communications and monitor the results.

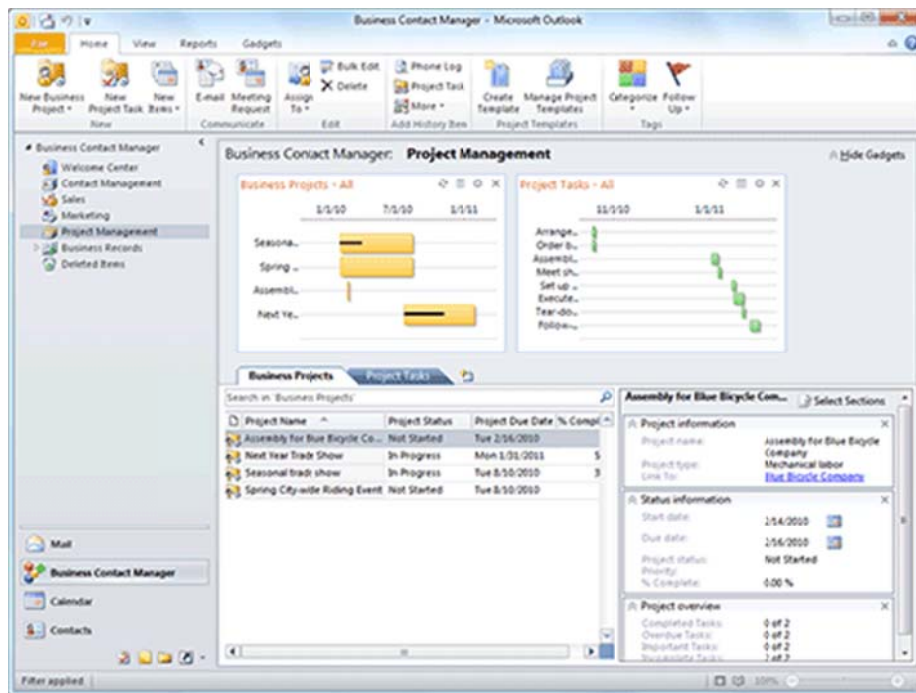
- **Create sophisticated and targeted mailings.** Filter prospect and customer data, and then seamlessly send campaigns using Publisher or Word.
- **Manage customer calls.** Execute calls to groups of existing or potential customers. Select exactly the contacts that you need to call, then write or import a call script. As the call proceeds, take notes directly in the script, then record "call complete" and set a follow-up flag for those contacts requiring additional actions, such as providing a brochure or making a personal visit.



## Manage projects with timelines and templates

Manage your projects and share project-related information with others in the company.

- **Monitor project activities.** Centralize all project information, including activities, e-mail messages, meetings, notes, and attachments.
- **Create and manage project templates.** Use Project Templates to create projects in an instant, even those with many dependent tasks. Just define the project you need once, save it as a named template, and create as many additional projects of the same type as you need.
- **Assign projects and project tasks to others.** When you assign a project task, information is automatically transferred to that individual's task lists, appearing on the To-Do Bar and as an Outlook reminder.



## Customize to fit your business needs

Create new record types, customize existing ones, and define relationships between records, using the visual form designer.

- **Create and customize new or existing record types.** Add or remove fields so that each record reflects exactly your business needs.
- **Define new record types.** Create Vendor, Salesperson, or Employee records, and then decide exactly which fields each record type needs.
- **Define relationships between records.** Keep track of virtual teams, your customers' business partners, or their key influencers.
- **Do all of this with the visual form designer.** Click and drag to create new fields, removes one you don't need, or rearrange fields on the form.
- **Integrate with custom applications.** With the software development kit, or SDK, technology developers and consultants can customize Business Contact Manager to integrate with other line-of-business applications.



The screenshot displays the 'Business Contact - Form Layout' window in Outlook 2010. The window is divided into several sections for customizing the contact form. The 'Business contact' section, highlighted with an orange border, includes fields for 'Full Name...', 'Job title:', 'File as:', and 'Assigned to:'. Below this, the 'Company information' section contains 'Company Name:', 'Linked account', 'Account...', 'Internet', 'E-mail', 'Display as:', 'Web page address:', 'Phone numbers' (with sub-fields for Business, Home, and Business Fax), and 'Addresses'. The 'Source information' section on the right includes 'Source:', 'Initiated by:', and 'Comments'. A large 'Notes' area is at the bottom right, featuring an 'Add Time Stamp' button. The top of the window has a 'Customize' tab and a ribbon with various actions like 'Save & Restore', 'Show', 'Hide', 'Rename', 'Add', 'Remove', 'Edit Field', 'Move', 'Wide', and 'Narrow'.

Take a look at the [top 10 ways](#) in which Outlook 2010 with Business Contact Manager helps you get things done easier and faster.