# Microsoft Outlook 2010 with Business Contact Manager Product Guide

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# Outlook 2010 with Business Contact Manager: An Overview

Small businesses face many of the same challenges that larger companies do, but with far fewer resources. Competition is fierce, time is always in short supply, and limited budgets often constrain marketing capabilities. One of the most challenging aspects of running a business is developing—and then maintaining—a customer base. Companies need to be able to respond to customer inquiries, manage customer interactions, and follow up on sales leads. They need an effective, easy-to-use contact management solution.

Although there are countless customer relationship management (CRM) solutions available, most are designed for larger companies and may require significant investments in software and employee training. Plus, these solutions may not work well with other applications typically found in smaller businesses. To be effective, small businesses need a contact management solution that is attractively priced, can work well with existing applications, and is easy to learn.

Microsoft® Outlook® 2010 with Business Contact Manager is that solution. By combining robust contact management features with Microsoft Outlook 2010, it helps small businesses to easily centralize their contact and customer information using the familiar Outlook user interface. Outlook 2010 with Business Contact Manager helps businesses create and execute effective automated marketing campaigns, manage sales leads and opportunities throughout the sales process, provide service, and follow up after the sale. It also provides tools for centralizing project information and following up on project-related tasks.

This document contains two core sections. The first provides an at-a-glance overview of the key benefits and important features in Outlook 2010 with Business Contact Manager. The second section provides a closer look at how some of the features of Outlook 2010 with Business Contact Manager are used.

# Outlook 2010 with Business Contact Manager: At-a-Glance

## Organize Customer Information

Outlook 2010 with Business Contact Manager consolidates and simplifies your contact and customer information management with up-to-date information on all the people and organizations that do business with your company.

### Get more done with a new user interface

Outlook 2010 with Business Contact Manager provides a new, role-centered user interface based on "workspaces." Whether you work primarily in sales, marketing, project management, or general contact management, there's a workspace and powerful tools that will help you do your job more effectively.

- Each of the **four workspaces—Sales, Marketing, Project Management, and Contact Management—can be tailored to your needs**. The top of each workspace contains gadgets; small, user-configurable charts or lists that show key business metrics like your sales pipeline or projects. Below the gadgets are tabs, each with a list of records that can be filtered, sorted, and grouped to meet your needs. Even the reading pane is customizable to fit your information needs.
- **The enhanced Ribbon**, which is now found throughout Outlook 2010 and Business Contact Manager, makes it easy to find and access the commands you need to get your job done.
- Outlook 2010 with Business Contact Manager provides a **customizable dashboard**. Populate the dashboard with gadgets to show information and metrics that matter to your business.
- Configure Outlook 2010 with Business Contact Manager using the new **Microsoft Office Backstage™ view.** From here, you can import data, customize, share, and back up your important customer information.

## Work together more effectively

Track all the information related to the people who do business with your organization, share it with your colleagues, and take it with you. The information is at hand when and where you need it.

- Access information related to each business contact—e-mail messages, phone calls, appointments, tasks, notes, and documents—from within Outlook 2010. Outlook 2010 with Business Contact Manager **automatically links e-mails** received from or sent to your customers. This ensures that everyone has the most up-to-date information.
- With the new synchronization feature, you can **view and edit your Business Contacts anywhere** you can access Outlook Contacts.
- Using multiuser features, you can provide password-protected network access to **share customer information with coworkers**.
- **Update records when you are out of the office.** Add new records or update existing ones on your portable computer, and then synchronize all your changes—and changes made by others—when you return.

## Customize to fit your business needs

Customization is vastly improved in Outlook 2010 with Business Contact Manager. You can now create rich, customized forms, and even create new record types for your business.

- **Customize Business Contact, Account, Opportunity, and Business Project forms** using a simple visual form designer. Remove existing fields, create new fields, and change the form's layout to suit your needs.
- **Create custom record types,** such as Mechanic, Vendor, or Medical Practice, to reflect the roles of the people and the kinds of organizations that matter to your business.

# Manage Sales Activities

Outlook 2010 with Business Contact Manager provides new tools to help you effectively follow up on sales leads and opportunities and track activities throughout your sales process.

## Pursue your most promising leads with automatic lead scoring

The new Lead record type has automatic lead scoring, which helps a salesperson pursue the most promising leads first. What's more, a business owner or salesperson can design the criteria for the score so, for example, referrals can be scored higher than leads from a purchased list.

## Drive opportunities from inception to closed-won

To the salesperson, opportunities are everything. Each represents a potential sale, and the effective salesperson knows that it's critical to follow up on all opportunities. Outlook 2010 with Business Contact Manager makes that easy.

- **Sales stages help the salesperson track opportunities from inception to successful close**. Users can define sales stages and the sales activities within them, and get optional reminders in Outlook 2010 to ensure follow through. Small business owners can monitor future sales with the **Sales Pipeline and Sales Funnel gadgets and reports**.
- Maximize profit by targeting your best customers and top-selling products. Use the **Top Customers and Top Products gadgets and reports** to show who bought the most, and which products are the most profitable. Export reports to Microsoft Excel® 2010, with formatting and formulas intact, for further analysis.

# Create and Track Marketing Activities

With Outlook 2010 with Business Contact Manager, you can create and distribute personalized marketing communications and monitor the results with ease.

## Create and execute call lists from within Outlook

Staying in touch with existing or potential customers is critical to the success of any business. With Call Lists, you can easily choose the recipients, write or import a call script, and then track the results of each phone call.

## Market effectively with personalized communications

Create targeted mailing lists by filtering prospect and customer data, then use mail merge with Microsoft Publisher 2010 or Microsoft Word 2010 to create personalized e-mail or printed marketing materials.

- **Track marketing activity by customer**. Each marketing communication you send is automatically included in the recipient's communication history.
- **Measure each marketing activity's success** with marketing activity tracking and associated gadgets and reports. Determine the success of each activity to maximize the effectiveness of future marketing efforts.

# Centralize Project Information

## Manage Projects from within Outlook

You've successfully closed the sale, and now need to fulfill—or exceed—the customer's expectations. How will you ensure that nothing falls through the cracks? That everything is scheduled? That resources are lined up? The project management features of Outlook 2010 with Business Contact Manager help with all of these activities.

- **Define projects and their tasks** and then assign them to your co-workers. If you've shared Outlook 2010 with Business Contact Manager with your co-workers, then all project information is instantly available to everyone who needs it. Monitor all your project activities with project gadgets and reports. Both gadgets and reports now include Gantt (timeline) charts so that you can see at a glance what needs to be done.
- Outlook 2010 with Business Contact Manager helps you track relevant e-mails by **automatically linking e-mails** to the project record.
- If your projects tend to be very similar to one another, it can be tedious to define the same project tasks each time you need them. Outlook 2010 with Business Contact Manager can help with **Project Templates**. Define a project and its tasks once, and then re-use it as many times as you like.

# Outlook 2010 with Business Contact Manager: A Closer Look

## Organize Customer Information

Your customer data may be stored in many different places, using many different technologies, from paper-based files and notes to e-mail messages, documents, spreadsheets and databases. Using different formats can lead to duplication and information that's wrong or out of date. And synchronization among colleagues or data files can be confusing, time consuming, and error-prone.

Outlook 2010 with Business Contact Manager stores all customer information in a single location, providing easy to access to anyone who needs it. What's more, all your customer information is accessible using Outlook 2010, a familiar program that you probably already know well and use every day for e-mail and calendaring.

### Get things done with a new user interface

With its new streamlined user interface, Outlook 2010 with Business Contact Manager is easy to learn and use. The Welcome Center displays helpful information and videos to get you started quickly on managing contacts and customer information. And with the new Ribbon and Backstage view, you'll have all the commands you need to work faster and more effectively right at your fingertips.

#### Four workspaces tailored to your needs

The new version of Outlook 2010 with Business Contact Manager organizes data into four role-based workspaces: Contact Management, Sales, Marketing, and Project Management. Each Workspace displays lists of records and a customizable reading pane showing details of the selected record. Within each tab, select columns, apply filters to show only the records you need, and group them in any way that makes sense to you. For example, if you want to view Business Contacts in the state of Washington, add a new tab and apply a filter.

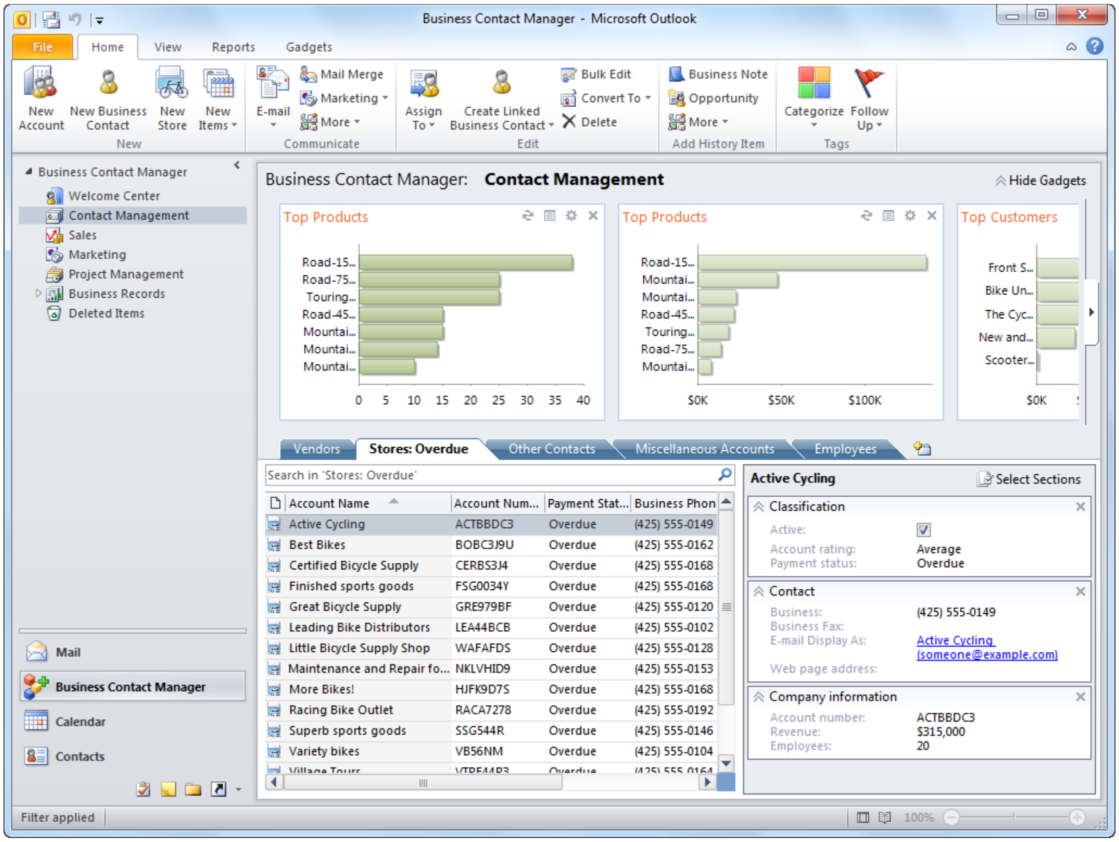


Figure 1 – The Contact Management Workspace. Each Workspace contains Ribbon commands optimized for the role, as well as customizable gadgets, lists of records and reading panes.

## Enhanced Ribbon

In Outlook 2010 with Business Contact Manager, each Workspace has a custom Ribbon. While some of the commands are common, others are specific to the role associated with the workspace. For example, the Sales Workspace has New Lead and New Opportunity, as well as the groups Communicate, Edit, and Add History Item.

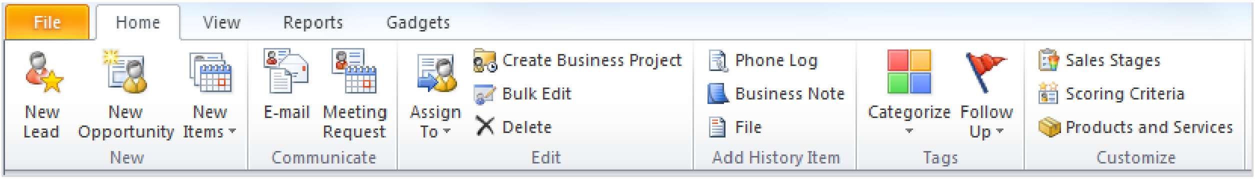


Figure 2 - The Sales workspace contains Ribbon commands, gadgets and tabs optimized for the sales role.

## Customizable Dashboard

With the new dashboard, a small business owner or sales manager can keep close track of the activities of his or her entire team. He or she can decide which gadgets to display, and select the options on each gadget to show the relevant data. For example, if sales information is critical, select the Sales Funnel and Sales Pipeline gadgets. If there are many projects to track, use the Business Project and Project Task gadgets.

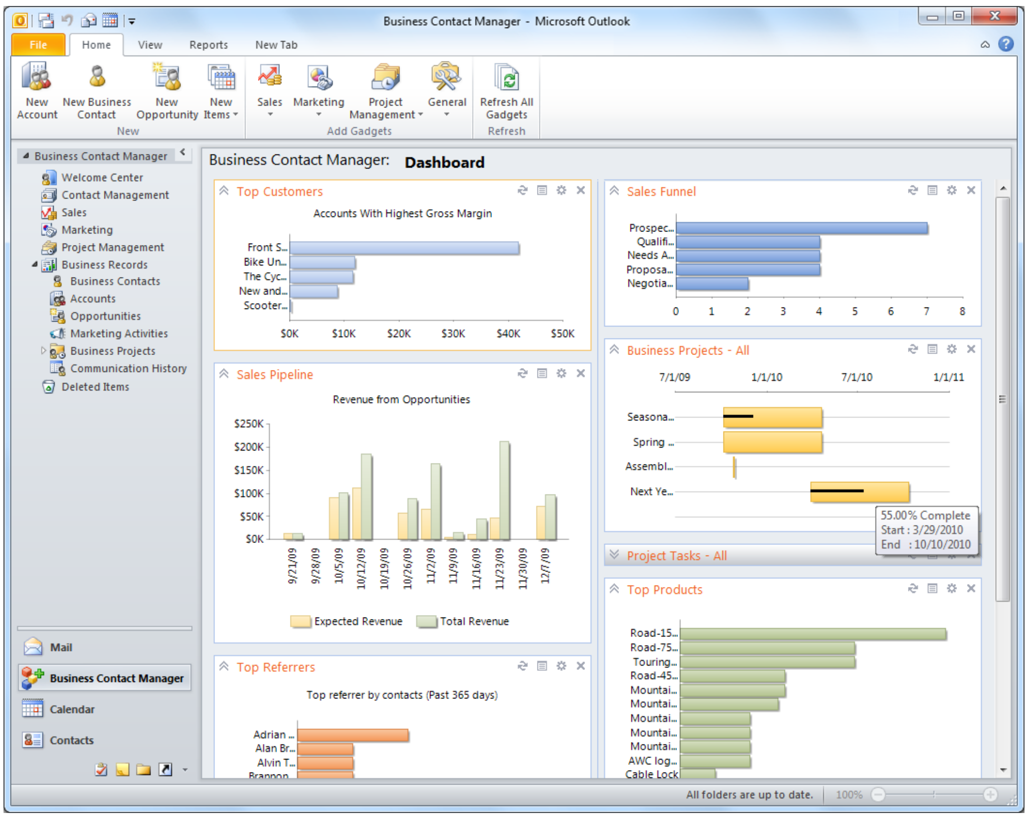


Figure 3 – Use the dashboard and its gadgets to keep track of key performance indicators. The dashboard can contain up to four columns of gadgets.

## New Microsoft Office Backstage View

The Microsoft Office Backstage view is a new feature of Microsoft Office 2010 that's designed to help you perform common tasks and access commands faster and easier than ever. The Backstage view replaces the traditional File menu found in prior versions of Microsoft Office applications. To use Backstage view in Outlook 2010 with Business Contact Manager, go to the upper-left edge of the Ribbon and click the File tab. Then select Business Contact Manager to import or export, backup or restore your database, or to customize Outlook 2010 with Business Contact Manager.

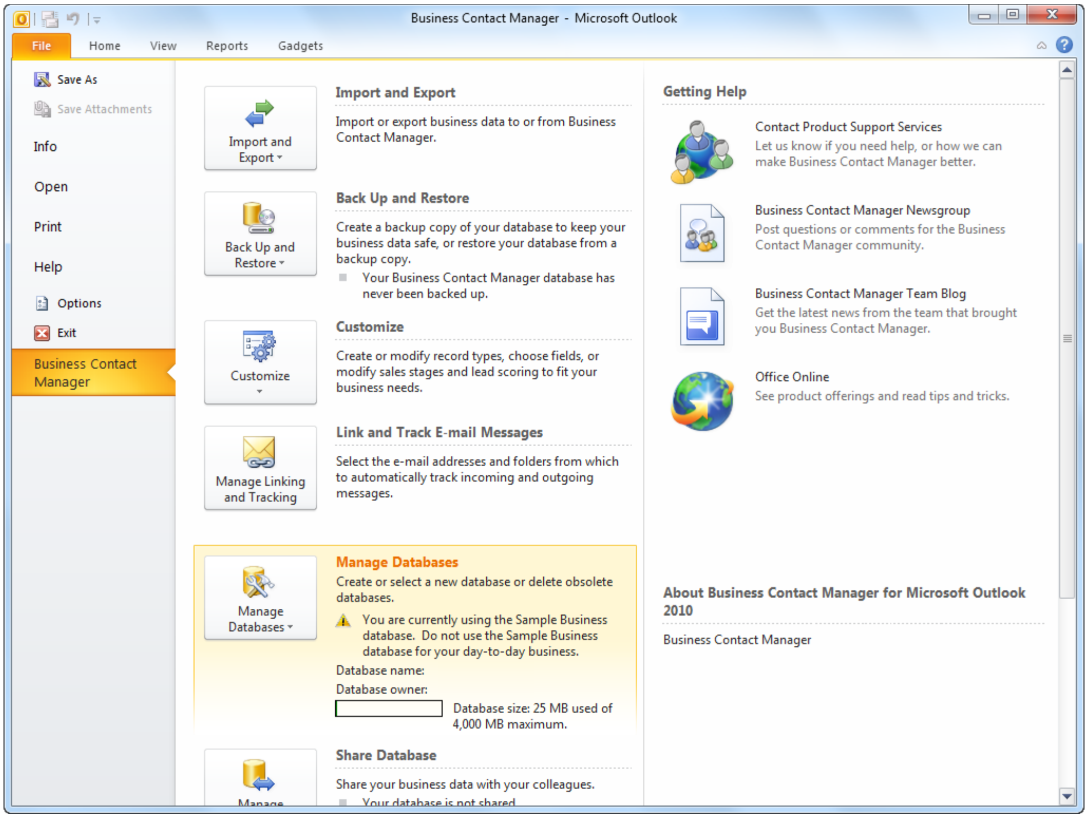


Figure 4 - The Backstage view with Business Contact Manager selected. Manage Databases is highlighted because this user is using the Sample Database. Along the right side are resources that you can access for additional help with Outlook 2010 with Business Contact Manager.

# Work together more effectively

## Link and Track Communications

Suppose that you are a salesperson who has sent samples and sales materials to a potential customer. Unfortunately, you're out of the office when the customer calls with questions. One of your colleagues takes a message that the customer called. When you return the next day, you call the customer, not really knowing what they need.

Outlook 2010 with Business Contact Manager can help address this common challenge with its Link and Track feature. Your colleague can open the customer record while taking the customer's call, and then immediately see that you've already sent the sales materials. The colleague can then ask if the customer has any questions or needs additional information. Rather than leaving you a cryptic phone message, your colleague had quick access to pertinent information and was able to help move the sale that much closer to a successful conclusion.

With Link and Track, users can also automatically associate all incoming and outgoing e-mail messages with the Business Contact or Account records that have the same e-mail address. This simple and effective mechanism helps eliminate the need for mailbox rules, for creating mail folders for each contact, or for having to move e-mail messages into these folders. Outlook 2010 with Business Contact Manager takes care of tracking your e-mail communication for you.

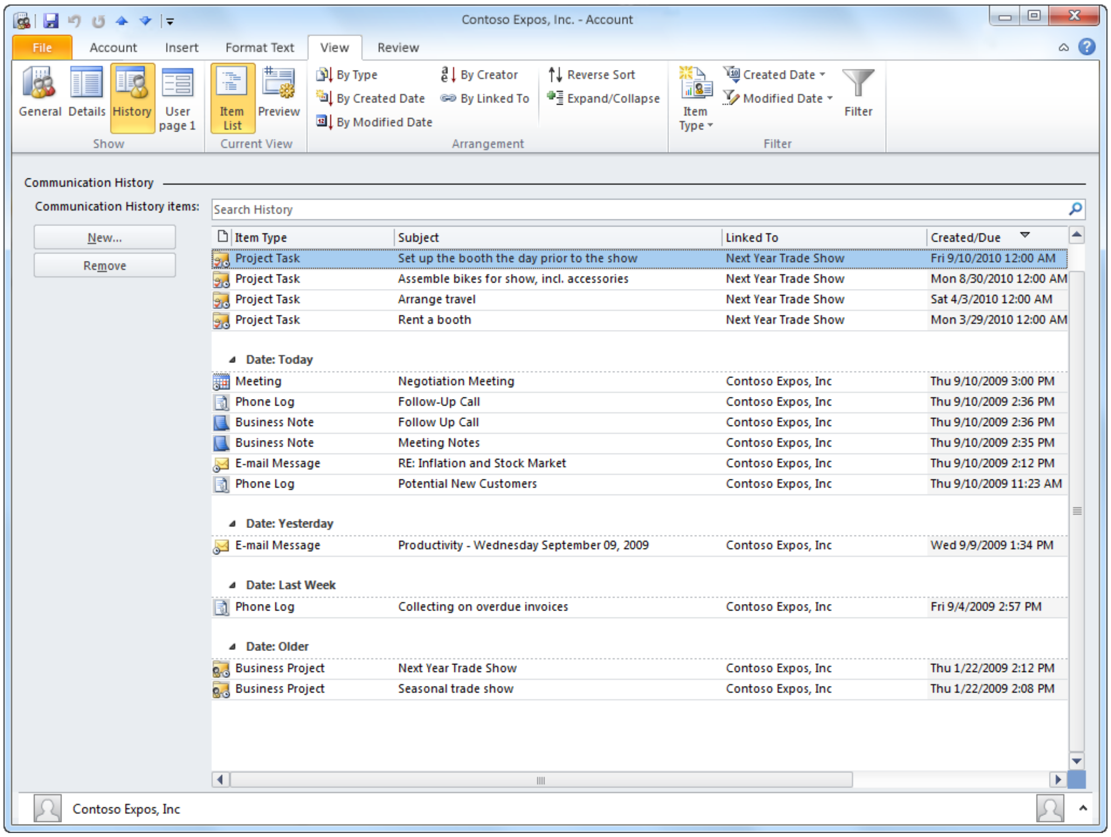


Figure 5 - The History page shows all the communication history items associated with each Account and Business Contact.

In addition to tracking e-mail messages, you can use Outlook 2010 with Business Contact Manager to associate phone logs and documents. Whether you're working in Word, Excel, or Microsoft PowerPoint® 2010, you can link the document to a Business Contact or Account using the Backstage view of the current document.

## View and Edit Business Contacts Anywhere You Can Access Outlook Contacts

Using the new synchronization feature in Outlook 2010 with Business Contact Manager, you can access your Business Contacts from anywhere you can access your Outlook Contacts folder. Outlook 2010 with Business Contact Manager automatically copies all of your Business Contacts into your Outlook Contacts folder, and then keeps track of and synchronizes any changes made to those contacts. Thus, if you access Outlook Contacts using Microsoft Outlook® Web App, Microsoft SharePoint®, Windows Live™ or a mobile device, you now also have access to your Business Contacts.

## Share Customer Information with Coworkers Who Need It

Other people in your organization may need access to your customer information to do their own jobs. If that information is stored in a document or spreadsheet on your hard disk, getting information to someone else can be difficult, and keeping multiple copies up to date can be a nightmare.

Fortunately, if you have a network, Outlook 2010 with Business Contact Manager makes it easy to share customer information with anyone who needs it. With Outlook 2010 with Business Contact Manager data sharing, all employees are working with a single copy of customer information that is up to date.

From Backstage view, access a simple sharing wizard that lets you give password-protected access to authorized colleagues. People who do not have authorization will not be able to access the data.

## Stay Connected When You Are Out of the Office

Many businesspeople never go anywhere without their laptops. For salespeople, marketers, and others who need contact information to perform their jobs, it's critical to always have that information at hand regardless of location—in a hotel, on a plane, or at a customer's site. At the same time, no one wants their valuable contact information to be out of sync with changes and updates made by others back at the office, or by colleagues who are also traveling.

Fortunately, Outlook 2010 with Business Contact Manager includes the Offline feature. While you're in the office, Outlook 2010 with Business Contact Manager makes a local copy, on your laptop, of your entire Business Contact Manager database, and then keeps it up date with any changes made by you or anyone else using the shared database as long as you remain online. When you leave the office, Outlook 2010 with Business Contact Manager automatically switches to the local copy, so you can continue working just as if you're still in the office.[1]

[1] Some features, such as backup and customization, are not available while you are offline.

## Customize to fit your business needs

No two small businesses are the same. While all are concerned with growth, revenue, expenses and profit, small businesses have different information they need to know and track about each contact, and different kinds of people and organizations with whom they interact. Outlook 2010 with Business Contact Manager can be easily modified to reflect the needs of your business.

### Customize Business Contact, Account, Opportunity and Business Project Forms

New with this release, Outlook 2010 with Business Contact Manager provides extensive customization capabilities for the Business Contact, Account, Opportunity, and Business Project forms. With an intuitive click-and-drag interface, you can remove fields that you don't need,[2] move existing fields where you want them, and add new fields. Create new fields of a variety of types—text box, date, drop-down list, relationship—and add them to the form wherever they make the most sense to you.

[2] Required fields cannot be removed.

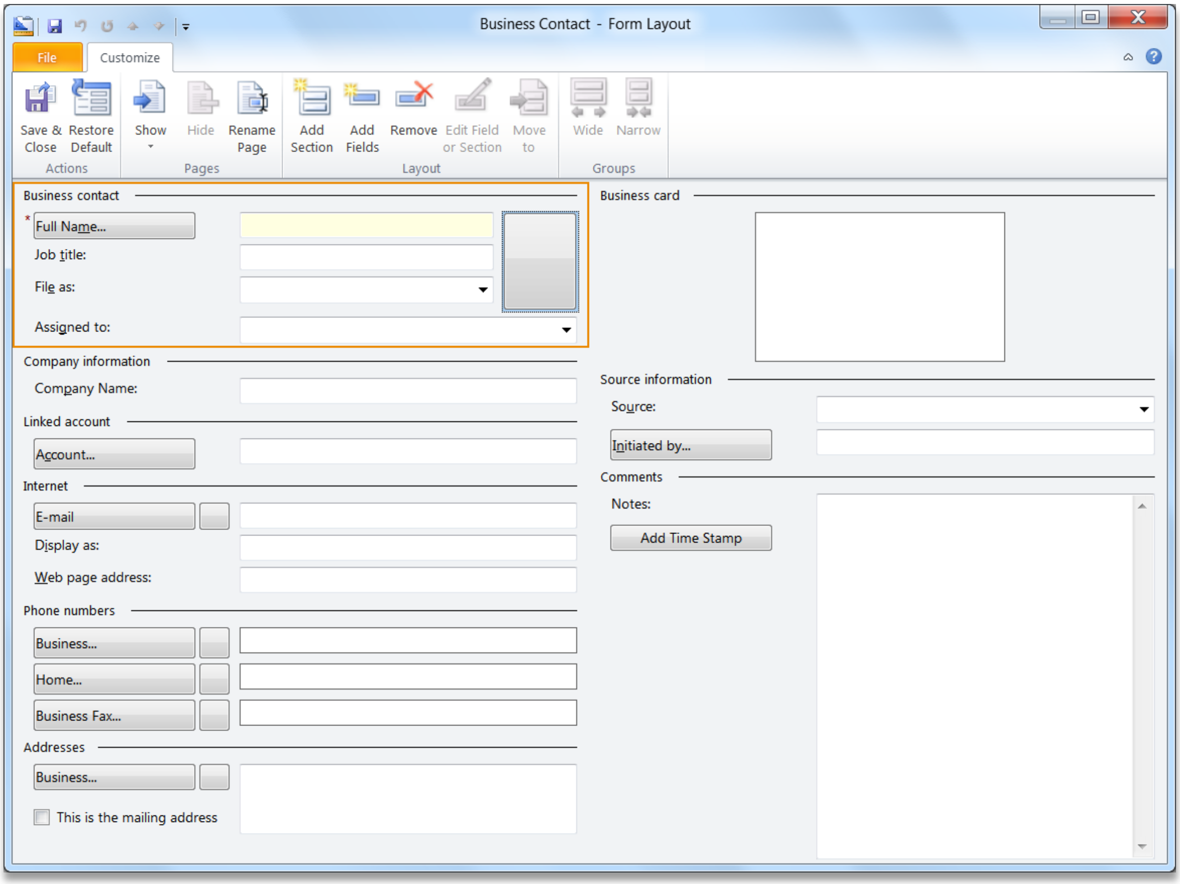


Figure 6 - With the visual form designer, you can drag fields and groups right where you want them.

### Create Custom Record Types

Outlook 2010 with Business Contact Manager provides Business Contacts and Leads (individuals with whom you do business) and Accounts (organizations with which you do business). But what if your business works with Clothiers, Caregivers, Contractors, Charities, Cardiologists, or Clubs? Outlook 2010 with Business Contact Manager lets you create your own record types and then customize them—just as you can the built-in records types—to fit your business needs.

## Manage Sales Activities

### Effectively Manage Your Sales Leads with Automatic Lead Scoring

You might have hundreds or thousands of leads from a variety of sources. Maybe you bought a list of leads, you gathered contact information from a Web site, or you collected business cards from people interested in your product. Perhaps you have lists of leads that are in another program such as Excel or Word. Once you get all these leads into Outlook 2010 with Business Contact Manager, how are you going to handle them? Clearly you want to pursue the most promising leads first, and handle the others later.

With Outlook 2010 with Business Contact Manager, you can decide which leads are most likely to purchase from you. Referrals are usually a very good indicator. Perhaps home addresses make certain leads more valuable than others, or you have specific details about the lead, such as income or home ownership, that matters to your business. Whatever the condition, you can add it as a scoring criterion.

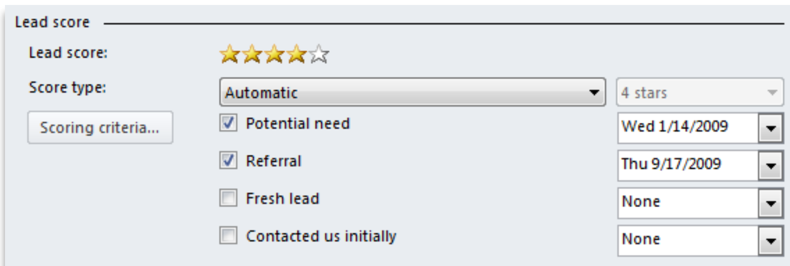


Figure 7 - Scoring criteria. Decide which criteria matter to your business, and then use those to let Business Contact Manager score all your leads.

In addition to automatic scoring, you can choose to manually score one or more leads. Suppose one of your leads told you he's very likely to buy, but he doesn't meet your other criteria. In that case, you can use manual scoring to assign a lead score of four stars, grouping it with other leads of the same value.

## Drive Opportunities from Inception to Closed-Won

For many small businesses, the sales cycle can take days, weeks, or even longer. During this time, you're building credibility with the potential customer, understanding his needs, performing competitive analyses, perhaps manufacturing samples, or writing detailed proposals and price quotes. These tasks may involve input from many different people, from technology experts to manufacturing, marketing, and finance people. You might also be working with subcontractors or vendors to help pull together the deal. And while each business will have different activities in their sales process, all can be complex, and they can be expensive.

### Use sales stages to drive toward successful close!

Fortunately, Outlook 2010 with Business Contact Manager makes it easy to follow a sales process, which increases the chances that a sale will succeed and that your investment will pay off. By default, Outlook 2010 with Business Contact Manager includes five sales stages:

prospecting, qualification, needs analysis, proposal/price quote, and negotiation/review. Each sales stage, in turn, has sales activities. You can assign a duration to each activity, and as you complete each task, Outlook automatically sets a reminder for the next activity. This keeps everyone involved with the sale on track toward successful close.

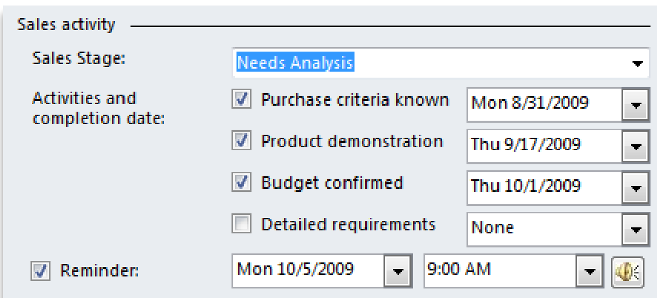


Figure 8 - The activities associated with the Needs Analysis sales stage.

Sales funnels are one way to visualize the number of opportunities or the potential revenue in each sales stage. Since not all opportunities in each stage will progress to the next stage, you'll want to ensure that the top of the funnel—for example, Prospecting—has more opportunities than the stages further down the pipeline. In Outlook 2010 with Business Contact Manager, you can show sales funnels either as number of opportunities or as expected and total revenue.

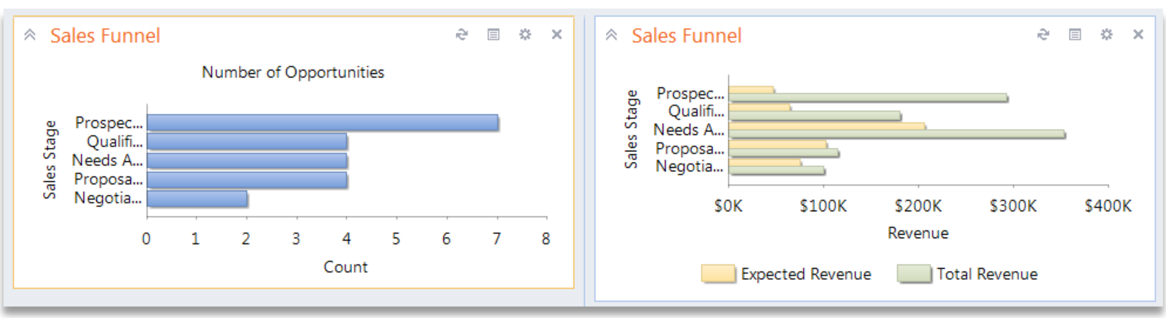


Figure 9 - Sales Funnel showing number of opportunities (left) and expected and total revenue (right).

## Customize sales stages to fit your business

Of course, no two small businesses will follow the same sales process. Outlook 2010 with Business Contact Manager lets the sales manager or small-business owner easily create a sales process that works for the business. From Backstage view, select Customize, then Modify Sales Stages and Sales Activities.

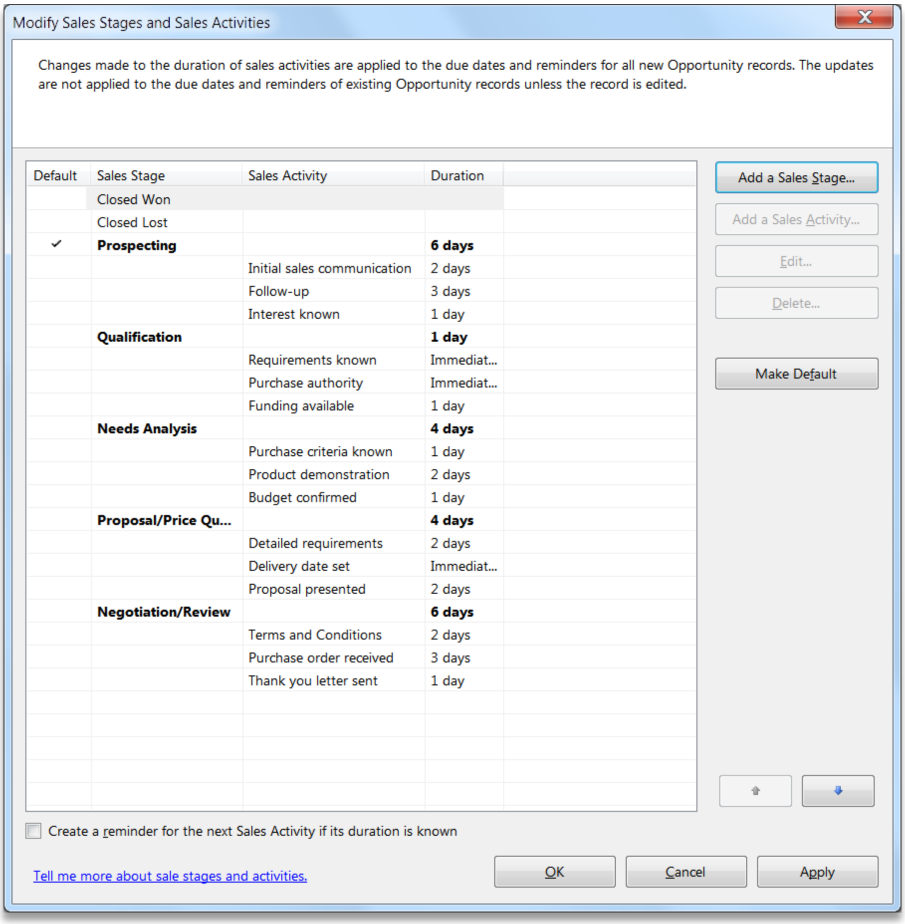


Figure 10 - Sales stages and their activities and durations.

## Maximize profit by targeting your best customers and your top products

No matter how effective your sales process, there will always be some customers who buy more than others. Similarly, some products will be more profitable, not just because their gross margin is higher, but because of the quantity of products sold.

You can use the gadgets and reports in Outlook 2010 with Business Contact Manager to track your most profitable customers and your most profitable products. Each gadget allows you to select revenue or gross margin, and double-clicking either gadget opens the corresponding report.

Look at the Top Customers gadget on the right of Figure 11. Suppose you want to know details about a customer's purchases. All you need to do is double-click the gadget to reveal details about closed-won opportunities with that customer.

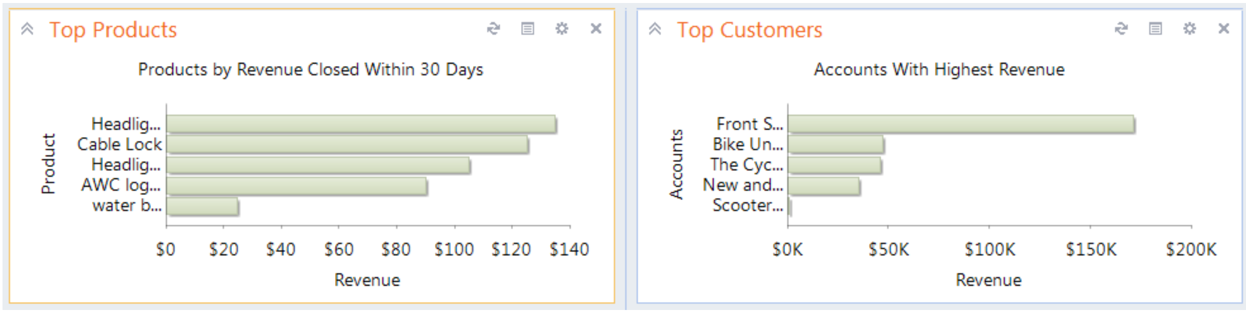


Figure 11 - Top Products and Top Customers gadgets.

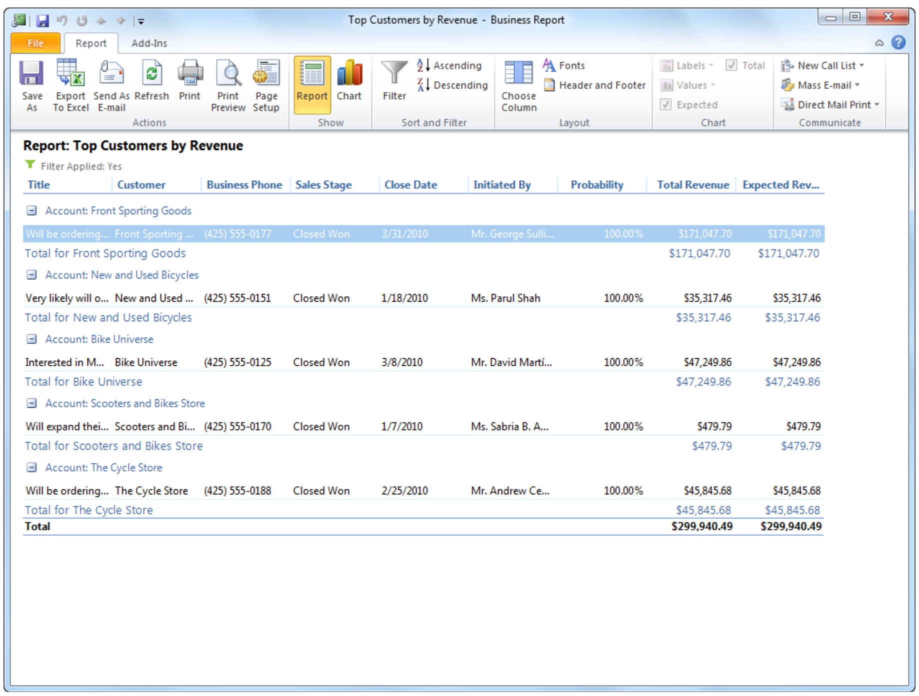


Figure 12 - Top Customers by Revenue report. To create this report, double-click the Top Customers gadget.

## Create and Track Marketing Activities

Before sales, there's marketing. Outlook 2010 with Business Contact Manager can help you find new customers and keep in touch with existing ones. After all, the most cost-effective customer to acquire is the one you already have.

Of course, there are other reasons to keep in touch: you might need to send information about updates, documentation, or upcoming events, even if you're not pursuing sales.

One of the new workspaces in Outlook 2010 with Business Contact Manager is the Marketing workspace which provides tabs for the different kinds of marketing communications.

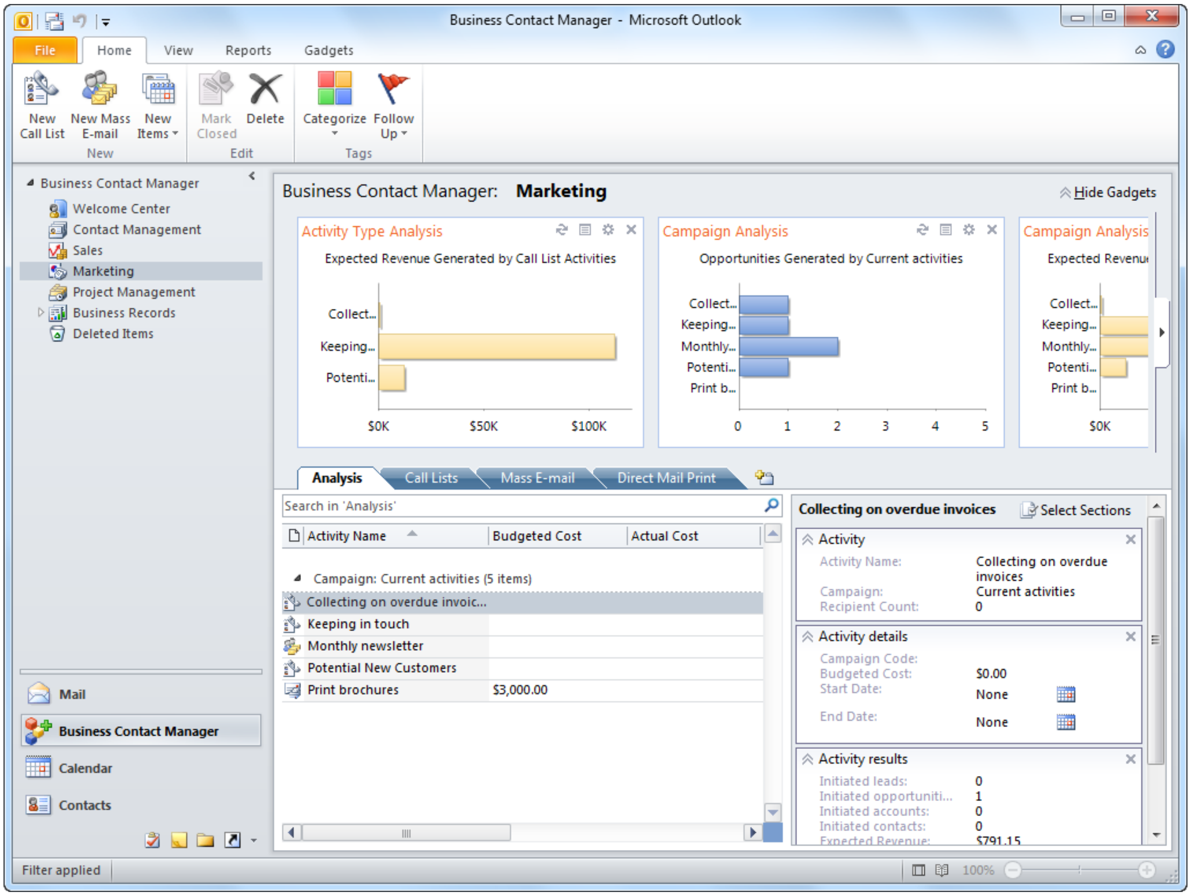


Figure 13 - Marketing workspace showing the Analysis tab.

## Create and Execute Call Lists from within Outlook

Suppose you need to call more than one or two business contacts and deliver essentially the same message while keeping track of who you called and what they said. The new Call List feature of Outlook 2010 with Business Contact Manager can help.

To create a new call list, first select the Business Contacts or Accounts that you want to contact. You could, for example, select your top-rated leads, or create a tab showing only overdue Accounts. Next, import or type in a call script. This could be an exact script of what you intend to say, or just notes of the material you need to cover. Once a call list has been created, you can call the next person on the list whenever you have a few minutes free, using the script to guide you. Record the duration of each call by clicking the Start Timer button, and as the call proceeds, take notes directly in the script.

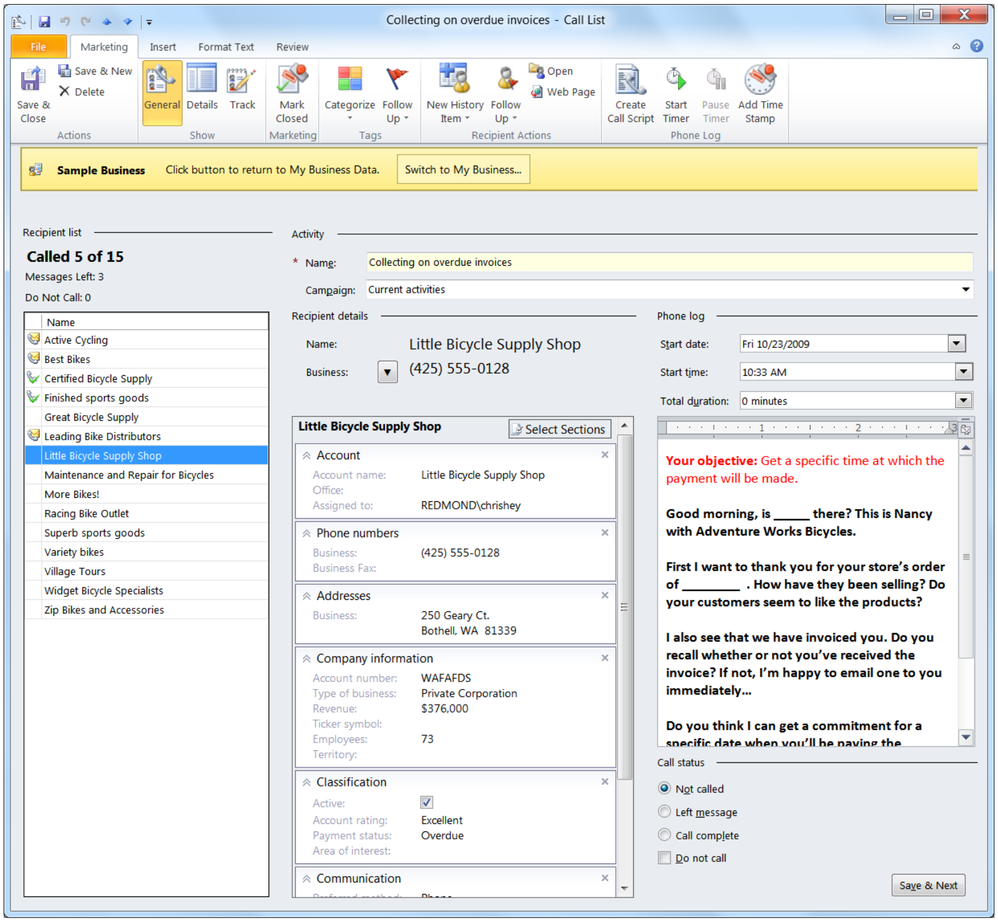


Figure 14 - Call list used to encourage customers to pay overdue invoices.

After each call, a phone log that contains the script, any notes you've added, and the call duration is attached to the communication history of each person contacted.

## Market Effectively with Personalized Communications

Many small businesses use e-mail or traditional mail more than the phone for their marketing communications. For them, Office 2010 and Outlook 2010 with Business Contact Manager provide tools to easily choose recipients, create materials, and track results.

You can specify who should receive a marketing communication either by creating a tab that shows all the recipients, or by choosing them from an existing tab. Then, just click the type of activity you need (Call List, Mass E-mail or Direct Mail Print), modify the list of recipients, and finally choose an existing document to send or create a new one. If you choose mail merge, Outlook 2010 with Business Contact Manager will open Word or Publisher, which will walk you through the mail merge process.

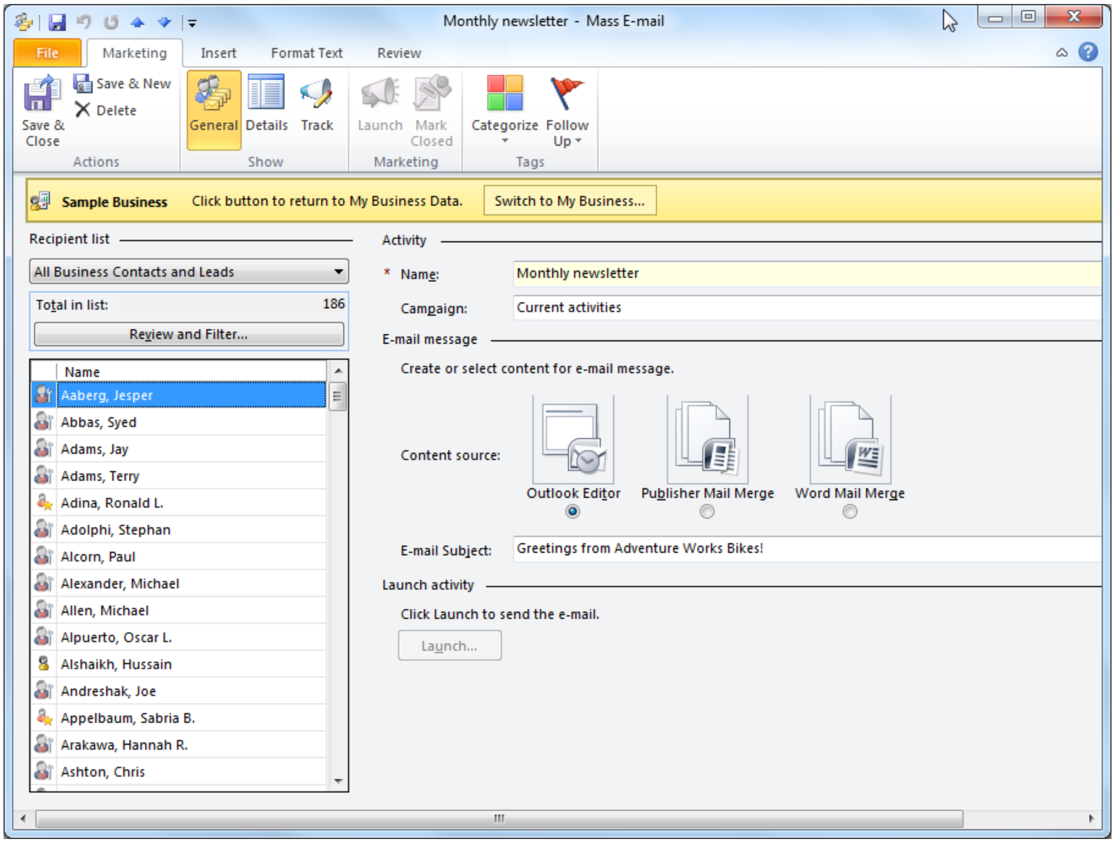


Figure 15 - This Mass E-mail activity will be part of the Summer 2010 Campaign.

## Track Marketing Activities

To make your marketing more cost-effective, take advantage of the marketing activity tracking features in Outlook 2010 with Business Contact Manager.

Every e-mail sent—whether or not it is part of a marketing activity—can be automatically associated with a recipient's record so it shows up in their communication history, making it easy to track responses to your mailings. Plus, each time you create a new lead or opportunity, you can record its source as the marketing activity that brought in the lead. Finally, marketing gadgets and reports in Outlook 2010 with Business Contact Manager give a graphical comparison of the performance of marketing activities and campaigns. The result is that you improve and refine each successive activity for maximum impact.

# Centralize Project Information

Project management can be time-consuming and error-prone when employees do not have access to the information they need. Outlook 2010 with Business Contact Manager takes the hassle out of juggling the tasks associated with projects, jobs, and clients by providing a single place to store all tasks and information. New capabilities streamline activities and communications related to projects, and make it easier to follow up on project tasks.

## Define projects and their tasks

The Business Projects feature eases your access to project information so you can work more efficiently. Just as you can link e-mail messages, notes, appointments, and tasks to individual business contacts, you can also link them to specific projects. The information is readily available, when and how you need it. And, you can easily share it with others in the company.

Outlook 2010 with Business Contact Manager includes gadgets and reports that give you an overview of all active, overdue, or upcoming projects. The gadgets and reports display project information such as start date, end date, and completion status in a graphical format. Gadgets can be placed in the Project Manager workspace—or any other workspace—so you have immediate access to the information you need.

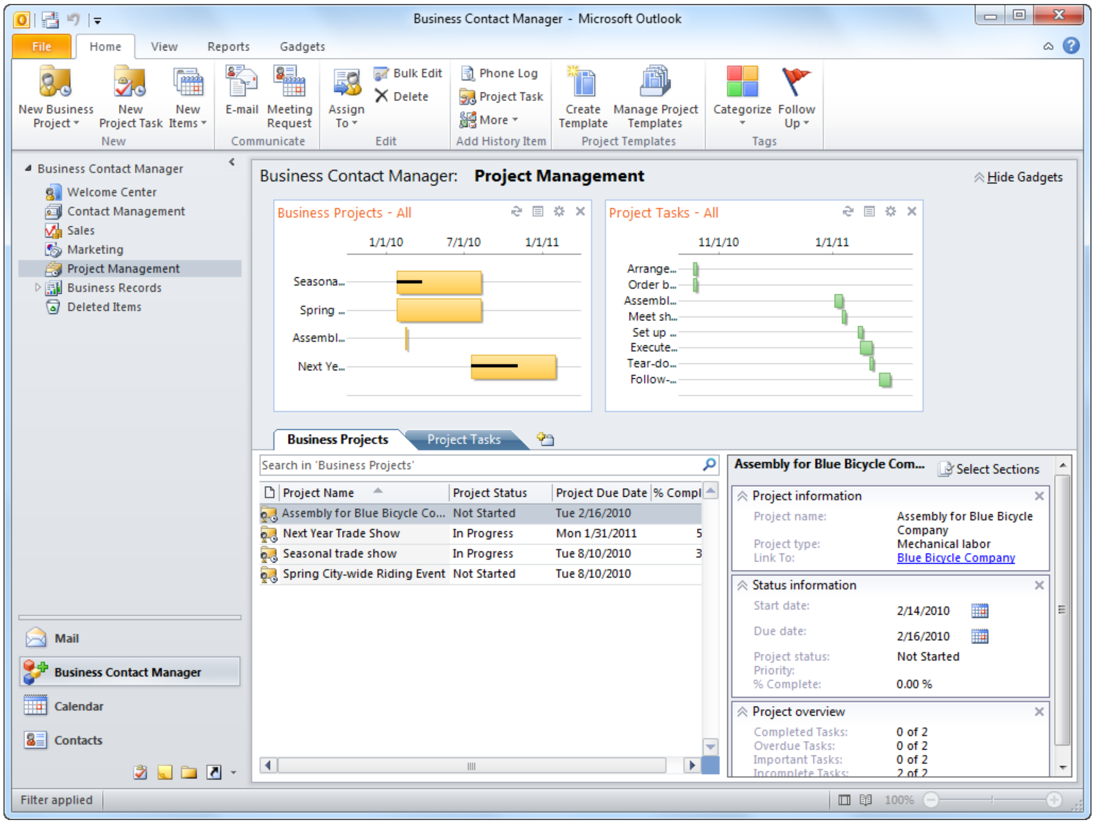


Figure 16 - Project Management workspace.

## Automatically link e-mail messages to Business Projects

The ability to automatically link e-mail messages to Business Contacts and Accounts also extends to Business Projects, with one important difference: because Business Projects don't have e-mail addresses, you need to specify the subject of the e-mails that you want to link. Select the e-mail message you'd like to link, and then click Link & Track in the Ribbon. Now click the E-Mail Subject tab, and then select the Business Project(s) to which you'd like to link this and all subsequent messages with the specified subject. Outlook 2010 with Business Contact Manager automatically ignores minor changes to the subject like Re: and Fwd: so that all messages related to the Business Project are properly linked.

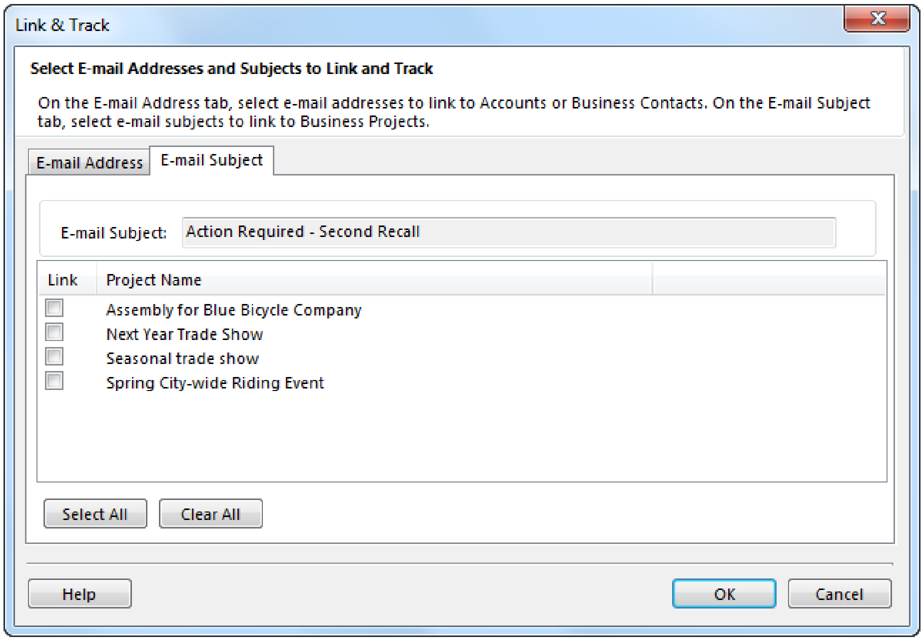


Figure 17 - Business Project Link and Track dialog box.

## Create and Manage Project Templates

Many businesses perform the same kinds of projects over and over again, with tasks and durations that are the same each time. Before Outlook 2010 with Business Contact Manager, you would have had to create all the tasks each time you needed them. Now, with the new Project Templates feature, you can create templates that can be used repeatedly to create Business Projects. Each Project Template can include a set of tasks, estimated duration for each task, and the sequence in which tasks should be performed. When you need to create a new Business Project, simply use a saved template to automatically create a Business Project with all its Project Tasks.

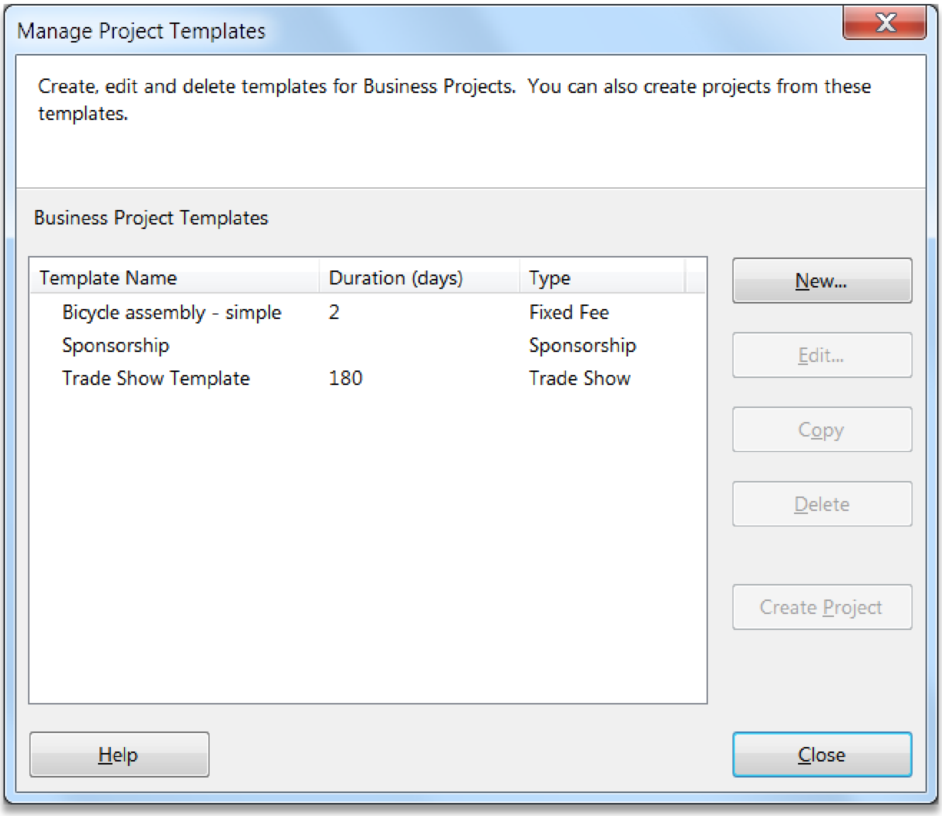


Figure 18 - Use Project Templates to quickly create Business Projects.

# Conclusion

Outlook 2010 with Business Contact Manager provides small businesses with an easy to use yet sophisticated customer relationship management solution.

With Outlook 2010 with Business Contact Manager, you can create new record types and customize them to meet your organization's needs, pursue the most promising leads first, track sales opportunities and execute projects, and run marketing activities. And all of this happens within Outlook, the program that Microsoft Office users worldwide rely on every day for their e-mail and calendaring.

# Where to Find It

| | Features and Benefits | Where to Find |
|---|---|---|
| **New!** | Workspaces | Use four role-specific workspaces to organize your business data: Contact Management, Sales, Marketing, and Project Management.<br>• In the Navigation pane, click the **Business Contact Manager** button.<br>• Select the workspace that best fits your role. |
| **Improved!** | Full form customization | Completely customize Business Contact, Account, Opportunity and Project forms.<br>• Open any record. On the right side of the Ribbon, select **Form Layout**. |
| **New!** | Customizable reading pane | Choose the information important to your business. Get details on each record, or even edit the record, without having to open the form.<br>• From any tab, click **Select Sections**. You can also rearrange the sections in the reading pane by dragging. |
| **New!** | Create entirely new records that reflect your business | No longer limited to Business Contacts and Accounts, you can now create records that reflect your business. Create vendors, patients, cardiologists, mechanics or store managers – whatever you need to run your business.<br>• From the Backstage view, click the **Business Contact Manager** tab.<br>• Click **Customize**.<br>• Select **Customize Record Types**. |

| | Features and Benefits | Where to Find |
|---|---|---|
| **New!** | Sample business data | Sample business data lets you experience Business Contact Manager without having to import or create your own data. Explore gadgets, workspaces, reports and customization without fear that your business data will be affected.<br>• From the Backstage view, click the **Business Contact Manager** tab.<br>• Click **Manage Databases**, and then **Switch to Sample Business**. If you're already using Sample Business, the menu item will be labeled **Switch to My Business**. |
| **New!** | Project Templates | Create a complex project only once. From then on, use Project Templates to create new projects of the same type.<br>• On the Ribbon in the **Project Management** workspace, select **Manage Project Templates**. |
| **New!** | Dashboard | Get an overview of all your business data. Decide which metrics are important to your business, and then monitor them directly in Outlook.<br>• Click the **Business Contact Manager** button, then the **Business Contact Manager** folder. |
| **New!** | Welcome Center | Get a quick overview of Business Contact Manager. Identify features important to you and learn how to use them.<br>• Click the **Business Contact Manager** button, and then select **Welcome Center**. |
| **New!** | Lead Scoring | Maximize your efficiency by pursuing the most promising leads first.<br>• On the left side of the Ribbon in the **Sales** workspace, click **New Lead**. The **Lead Scoring** section is on the right side of the form.<br>• Click the **Scoring Criteria** button to configure scoring for your business. |

| | Features and Benefits | Where to Find |
|---|---|---|
| **Improved!** | Reports and charting | Analyze your business with over 70 reports that all allow drill-down into the supporting records. And most reports now have charts to see trends immediately.<br>• Double-click any of the chart gadgets, select the report icon from the gadget, or select a report from the **Reports** Ribbon. |
| **New!** | Project timeline charts | See the status of each project and its tasks with simple Gantt charts.<br>• Click on the **Project Management** workspace.<br>• If not already present, add **Project Management** gadgets from the **Gadgets** Ribbon. |
| **Improved!** | Sales stages and sales activities | Define sales stages and activities within each stage to create a sales process that works for your small business. Automatic reminders keep you on top of your most profitable opportunities.<br>• Near the left end of the Ribbon in the **Sales** workspace, click **New Opportunity**. **Sales Stages** are shown on the right side of the form.<br>• In the form's Ribbon, click **Sales Stages** to configure the sales stages for your business. |
| **New!** | Customizable tabs | Create tabs that show exactly the records and fields that you need. Records can be filtered, sorted and grouped.<br>• To create a tab, click the **New Tab** button next to the existing tabs.<br>• Right-click on any column, then select **Add Columns** to choose columns relevant to your business. Find Business Contact Manager fields, including any custom fields you've added, under **User-Defined fields in the folder**. |

Microsoft® Office

# Version Comparison

✔ New in 2010 ◍ Improved in 2010 ○ Feature also in 2007

| Feature | |
|---|---|
| Multiple customizable workspaces | ✔ |
| Custom record types that reflect your business | ✔ |
| View and edit Business Contacts anywhere you can access Outlook Contacts | ✔ |
| Manage sales leads with automatic lead scoring | ✔ |
| Maximize profit by targeting your best customers and top products | ✔ |
| Create and use Project Templates | ✔ |
| Create and execute Call Lists from within Outlook | ✔ |
| Enhanced Ribbon throughout | ✔ |
| Charts – in Reports and gadgets – for quick analysis | ✔ |
| Project timeline (Gantt) charts | ✔ |
| New Microsoft Office Backstage view | ✔ |
| Fully customizable Business Contacts, Account, Opportunity and Business Project forms | ◍ |
| Export reports to Excel with formatting and formulas | ◍ |
| Dashboard with graphical charts | ◍ |
| Customize sales stages to fit your business | ◍ |
| Send personalized marketing communications | ◍ |
| Improved performance of sharing customer information with coworkers | ◍ |
| Track Marketing Activities and their effectiveness | ◍ |
| Work offline when you are out of the office | ◍ |
| Create Business Projects and track status | ○ |
| Track all communications | ○ |
| Use Sales Stages to drive toward successful close | ○ |

# Outlook 2010 with Business Contact Manager FAQ

1. **What is Outlook 2010 with Business Contact Manager and what does it do?**

   Outlook 2010 with Business Contact Manager combines robust contact management features with Microsoft Outlook 2010 to help small businesses easily centralize their contact and customer information using the familiar Outlook user interface. Outlook 2010 with Business Contact Manager helps businesses create and execute effective automated marketing campaigns, manage sales leads and opportunities throughout the sales process, provide service, and follow up after the sale. It also provides tools for centralizing project information and following up on project-related tasks.

2. **What Office 2010 features does Outlook 2010 with Business Contact Manager adopt?**

   Ribbon: The Ribbon, new in Outlook 2010 with Business Contact Manager, helps you to find the right commands quickly so you can focus on results.

   Microsoft Office Backstage: The new Microsoft Office Backstage view replaces the traditional File menu to help you get to the tasks you need and complete your work more efficiently.

3. **Where can I find information about using the Ribbon?**

   You can find information about the Ribbon by going to Help from within Business Contact Manager for Outlook.

4. **I don't know anything about Outlook 2010 with Business Contact Manager. Are there resources and trainings available from Microsoft?**

   Microsoft offers a broad set of resources for Outlook 2010 with Business Contact Manager users and potential users at http://office.microsoft.com. This includes videos and helpful how-to articles. What if I have questions or need advice while I'm working in Outlook 2010 with Business Contact Manager? Are there free resources available?

   You can access numerous free, self-help resources on Office.com. Resources range from how-to training and demos to obtaining answers from your peers and independent experts –such as the Microsoft Most Valuable Professionals—in the Microsoft Office communities.

The Welcome Center in Outlook 2010 with Business Contact Manager is another good way to get familiar with the product. It includes introductory videos and helpful learning material. You can access Welcome Center in Outlook 2010 with Business Contact Manager by going to Business Contact Manager navigation pane.

**5. What languages is Outlook 2010 with Business Contact Manager available in?**

Business Contact Manager for 2010 will be available in all of the following languages: Brazilian, Bulgarian, Chinese, Croatian, Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hebrew, Hindi, Hungarian, Italian, Japanese, Kazakh, Korean, Latvian, Lithuanian, Norwegian, Polish, Portuguese, Russian, Spanish, Swedish, Thai, Turkish, and Ukrainian.

**6. Who is Outlook 2010 with Business Contact Manager designed for?**

Outlook 2010 with Business Contact Manager is designed for small businesses and small groups within larger organizations.

# System Requirements

**1. Are there special system requirements for me to run Outlook 2010 with Business Contact Manager?**

Office 2010 was built to maximize performance across the hardware you already own, while also positioning you for future hardware innovations such as 64-bit chips, advanced graphics cards, multi-core processors and alternative form factor devices.

Following are minimum system requirements for Microsoft Office Professional Plus 2010:

| | |
|---|---|
| **Processor** | 500 MHz processor; 1 GHz required for Outlook with Business Contact Manager |
| **Memory** | 256 MB RAM; 512 MB recommended for graphics features, Outlook Instant Search, Outlook with Business Contact Manager, and certain advanced functionality. |
| **Hard disk** | 3.0 GB available disk space |
| **Display** | 1024x768 or higher resolution monitor |
| **Operating system** | Windows® XP with Service Pack (SP) 3 (32-bit operating system (OS) only) or Windows Vista® with SP1, Windows 7, Windows Server® 2003 R2 with MSXML 6.0, Windows Server 2008, or later 32- or 64-bit OS. |
| **Graphics** | Graphics hardware acceleration requires a DirectX® 9.0c graphics card with 64 MB or more video memory. |
| **Additional Notes** | • Certain advanced functionality requires connectivity to Microsoft Exchange Server 2010, Microsoft SharePoint® Server 2010, Microsoft Office Communications Server 2007 R2, and/or Microsoft SharePoint Foundation 2010.<br>• Certain features require Windows Search 4.0.<br>• Internet functionality requires an Internet connection.<br>• Certain online functionality requires a Windows Live™ ID.<br>• Certain features require Internet Explorer® (IE) 6 or later, 32-bit browser only.<br>• Viewing a PowerPoint presentation broadcast requires one of the following browsers: Internet Explorer 7 or later for Windows, Safari 4 or later for Mac, or Firefox 3.5 or later for Windows, Mac or Linux.<br>• Certain Microsoft® OneNote® require Windows Desktop Search 3.0, Windows Media® Player 9, Microsoft ActiveSync® 4.1, microphone, audio output device, video recording device, TWAIN-compatible digital camera, or scanner. Send to OneNote Print Driver and Integration with Business Connectivity Services require Microsoft .NET Framework 3.5 and/or Windows XPS features.<br>• Product functionality and graphics may vary based on your system configuration. Some features may require additional or advanced hardware or server connectivity; visit http://www.office.com/products. |

To obtain system requirements for each Microsoft Office 2010 suite and standalone applications visit: Office.com.

# Feature Availability / Disclosure

## Links provided in this product guide

- Some links provided in this guide will not be available until after the general availability of Microsoft Office 2010.

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