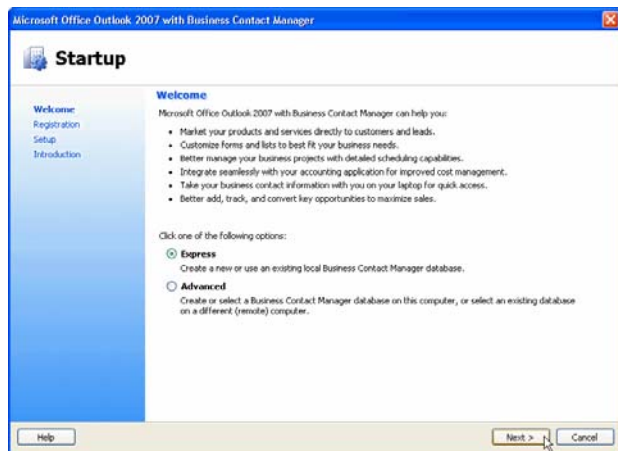
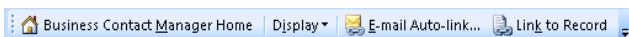


Setting Up Business Contact Manager

1. Insert Business Contact Manager disk.
2. Follow on-screen steps to install.
3. Open Outlook.
4. Choose Advanced or Express setup. (We recommend Express setup, unless you need to connect to an existing database.)
5. Walk through the wizard.



Business Contact Manager Toolbar



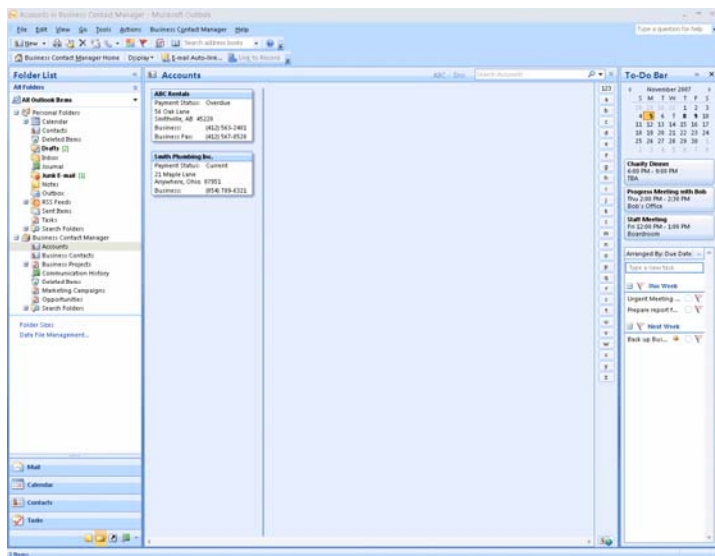
From left to right, this toolbar contains commands to show the dashboard, display the various folders (click Display to see a menu), manage e-mail auto-linking, and link items to records.

Business Contact Manager Menu

- Business Contact Manager Home** Opens the Business Contact Manager dashboard.
- Learn about Business Contact Manager** Opens the Business Contact Manager Web site.
- Accounts** Opens the Business Accounts folder.
- Business Contacts** Opens the Business Contacts folder.
- Opportunities** Opens the Opportunities folder.
- Business Projects** Opens the Business Projects folder.
- Project Tasks** Opens the Project Tasks folder.
- Marketing Campaigns** Opens the Marketing Campaigns folder.
- Communication History** Opens the Communication History folder.
- Reports** Use the sub-menu to generate different types of reports.
- Accounting Tools** If you have Microsoft Office Accounting Express 2007 installed, you can set up a connection to it.
- Manage E-mail Auto Linking** Lets you set options for linking e-mails to contacts and accounts.
- Database Tools** Share, manage, and create databases. You can also import and export data from this menu.
- Offline** If you're using a shared database, set offline options.
- Customize Forms** Customize Business Contact Manager forms.
- Product and Service Items Lists** A tool to help you manage pricing and inventory.

Business Contact Manager Items

- Business Contacts** Track the people that you do business with.
- Accounts** Track the accounts that you work with.
- Business Projects** Keep record of your major undertakings. (Example: Design Web site for Acme company.)
- Business Tasks** Keep track of the individual tasks in a project. (Example: Develop layout, contract IT firm...)
- Communication History** View records of all Business Contact Manager activities.
- Marketing Campaigns** Market your products using e-mail, Word, or Publisher.
- Opportunities** Keep track of sales opportunities from lead to close.



Installing and Configuring Accounting Express

1. Download file from Microsoft Web site.
2. Double-click setup file to launch.
3. Follow on-screen instructions.
4. Open Accounting Express from Microsoft Office folder in Start menu.
5. Use Company – Integrate with Business Contact Manager command to set up connection.



Creating a Basic Marketing Campaign












1. Click the File menu, choose New, and click Marketing Campaign.
2. Enter a campaign title, code, and type. Set the start and end date as well as a budget.
3. Choose your recipients from Business Contacts or Accounts.
4. Choose a delivery method.
5. Create the e-mail.
6. Click Launch to execute the campaign and send items.

Creating a Marketing Campaign w/Publisher or Word

1. Create and save publication.
2. Click New Marketing Campaign on Business Contact Manager toolbar in Publisher; Office menu – Business Contact Manager – New Marketing Campaign in Word.
3. A new Marketing Campaign will open in Business Contact Manager. Make any necessary changes, and then click Launch.
4. You will be returned to Publisher/Word. Walk through the Mail Merge wizard to complete your marketing document.
5. Print publication items to execute the campaign.

The Reports Toolbar

Business Contact Manager reports give you power over your data.

- | | | |
|---|---------------|---|
|  | Save Report | Save the report. |
|  | | Print the report. |
|  | | Print preview the report. |
|  | | Export the report to Excel. |
|  | | E-mail the report as an attachment. |
|  | | Refresh the report data. |
|  | Filter Report | Filter report data. |
|  | Modify Report | Modify the report. |
|  | | Change the order in which data is sorted. |
|  | | Create a marketing campaign. |
|  | | View help. |

Connecting to a Shared Database

1. Obtain database name, location, username, and password from database owner.
2. Click Business Contact Manager – Database Tools – Create or Select a Database.
3. Click Select an Existing Database.
4. Enter name and location of database.
5. Enter user name and password when prompted.

Click one of the following options:

Create a new database
Type a name for your new Business Contact Manager database.
Database name:

Select an existing database
Type the name of the computer where the existing Business Contact Manager database is stored, and then click Connect. If the database is stored on another person's computer, the owner of the database must share the database with you before you can connect to it.

Computer name:

Database name:

Frequently Asked Questions

How many Business Contact Manager databases can I have open at the same time?

Just one.

What kind of technology supports Business Contact Manager?

SQL Server and .NET Framework 3.0. These components should be installed with the application.

Can I share my Business Contact Manager database?

Yes. Click the Business Contact Manager menu, choose Database Tools, and click Share Database. You will be provided with a wizard to walk you through the process step by step.

What kind of accounting support does Business Contact Manager provide?

Although Business Contact Manager does not have accounting tools built in, you can download and install Accounting Express and connect the two databases.

How do I back up my Business Contact Manager data?

Click the Business Contact Manager menu, choose Database Tools, and click Manage Database. Then, click Back Up Database.