

Module 1 – Getting Started with Business Contact Manager

- What is Business Contact Manager?
- Downloading and Installing
- Opening Business Contact Manager
- Navigating in the Business Contact Environment
- Using the Navigation Pane
- Working with Dashboards

Module 2 – Working with Accounts & Contacts

- Accounts vs. Business Contacts
- Creating and Editing Accounts
- Creating and Editing Business Contacts
- Finding Information
- Accessing Business Contacts from Outlook

Module 3 – Managing Opportunities & Leads

- Creating a Sales Opportunity
- Editing Opportunities
- Viewing Sales Opportunities
- Creating a New Lead
- Converting Contacts to Leads
- Viewing Lead Details
- Scoring Leads
- Marketing Campaigns

Module 4 – Business Projects & Tasks

- Creating a Business Project
- Creating Project Tasks
- Assigning Tasks
- Managing Tasks

Module 5 – Managing Business Contact Data

- Viewing, Customizing, and Formatting Reports
- Customizing Charts
- Managing Customized Reports
- Viewing Database Information
- Creating a New Database
- Importing Data from Outlook and Other Applications