

# Customizing Outlook Business Contact Manager 2007 for Technical Services

Service Providers



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# Customizing Outlook® Business Contact Manager 2007 for Technical Services

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## INTRODUCTION

### Microsoft Office Outlook 2007 with Business Contact Manager: Essential Sales and Marketing for Small Business

As a Value Added Reseller, providing outstanding service to your customers is critical to your business success. Microsoft® Office Outlook® 2007 with Business Contact Manager gives you the opportunity to help your customers realize their sales, marketing, and customer service goals more efficiently and effectively. You can tailor Office Outlook 2007 with Business Contact Manager to your customers' unique needs, thereby delivering even greater value to them as you increase your sales and services revenue and add significant new value to your customer relationships.

With Office Outlook 2007 with Business Contact Manager your customers can:

- **Organize contact information:** Consolidate prospect and customer information and communications history in one place.
- **Manage sales activities:** Track lead information and use powerful management features to analyze, prioritize, and report on sales opportunities.
- **Launch and track marketing campaigns:** Create a targeted mailing list, distribute a marketing e-mail or direct mail, and track the results of each campaign.
- **Track service requests and other customer projects:** Create projects and task lists, assign responsibilities, assess and report on status, and ensure open items are followed up on and closed. Office Outlook 2007 with Business Contact Manager includes powerful dashboards to give your customers vital information at a glance.

Many of your customers have unique sales, marketing, and customer service data needs and processes. By tailoring Office Outlook 2007 with Business Contact Manager, you can meet these needs and support these processes. You can:

- Create and edit fields in Accounts, Contacts, and Tasks using the Custom Forms feature.
- Modify the standard reports that come with Office Outlook 2007 with Business Contact Manager.

- Export and import data between Microsoft Office Excel® 2007 and Microsoft Office Access® 2007 to accommodate reporting requirements beyond those offered by Office Outlook 2007 with Business Contact Manager.
- Extend the power and value of Office Outlook 2007 with Business Contact Manager when you integrate it with other Microsoft products, including:
  - Microsoft Windows® Small Business Server 2003 R2.
  - Microsoft Office Small Business Accounting 2007.
  - Office Excel 2007.
  - Office Access 2007.

Office Outlook 2007 with Business Contact Manager opens up new service opportunities as well:

- Develop “standard,” re-usable tailored solutions for vertical markets (e.g. real estate offices, insurance brokerages, home service businesses, etc.) These can be further tailored for individual customers. Training services help customers achieve the maximum potential of the solutions you create.

Using these approaches, you can help your customers realize the significant benefits of Office Outlook 2007 with Business Contact Manager quickly and at a reasonable cost.

## What This Document Will Do for You

This document will help you understand how Office Outlook 2007 with Business Contact Manager can help you increase sales and add more value to your customer relationships. This includes the following:

- An overview of the new standard features and capabilities of Office Outlook 2007 with Business Contact Manager, including step-by-step instructions for creating and exporting tailored solutions. We have included a sample solution with the Action Pack that you can import into Office Outlook 2007 and see what a tailored solution might look like for service providers like you. The document includes instructions on how to import the included files. You can use this sample solution right away to help manage your customer sales and service processes. However, you do not need to load the files to learn how to tailor the product.

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- Brief scenarios throughout the step-by-step instructions that can help you envision the business opportunities provided by tailoring Office Outlook 2007 with Business Contact Manager. The document also describes how to integrate Office Outlook 2007 with Business Contact Manager with Office Excel 2007 and Office Access 2007, and information on how you can use Office Outlook 2007 with Business Contact Manager to automatically send e-mails based on events your customers specify, such as when you add new accounts, assign service requests, or update project statuses.
- Guidance on how to host the Office Outlook 2007 with Business Contact Manager SQL database on Microsoft Windows® Small Business Server 2003 R2.

### What This Action Pack Includes:

- This document.
- Files to create a sample tailored view of the product (these are explained in the "Importing the Tailoring Files" included with this Action Pack).
  - ExportFile.bcm
  - ExportCustomizations.bcmx
- A sample database to show how data in Office Outlook 2007 with Business Contact Manager can be organized and analyzed in Office Access 2007.
  - BCMAccess.accdb
- A sample worksheet to show how data in Office Outlook 2007 with Business Contact Manager can be organized and analyzed in Office Excel 2007.
  - Support Call Report.xlsx
- A sample products and services list in .csv format that will help you quickly set up your own list of products and services correctly for import into Outlook 2007 with Business Contact Manager.
  - Products.csv
- A .vbs script that you can use with the sample tailored solution to automatically generate and send e-mails based on events your customers specify.
  - ProjectUpdateNotify.txt

## WHAT'S NEW IN MICROSOFT OFFICE OUTLOOK 2007 WITH BUSINESS CONTACT MANAGER

Before we get into the opportunities that Office Outlook 2007 with Business Contact Manager can provide for you as a Value Added Reseller, let's take a brief look at the key business needs that it is designed to address, and explore some of the improvements to the latest version.

Features in Office Outlook 2007 with Business Contact Manager include:

- **Reporting**
  - **Analyze your data.** Choose from an array of customer, prospect, and opportunity reports with advanced capabilities to help you sort and filter information. Drill deeper for more details and export your findings to Office Excel 2007 for further analysis.
  
- **Project management**
  - **Track, view, and access project activities and tasks in one place.** The Business Projects feature centralizes all your project information, including activities, e-mail messages, meetings, notes, and attachments.
  - **Assign project tasks to others.** Use the Project Tasks feature to assign tasks to others and automatically transfer the task information to their task lists, to-do bars, and Office Outlook 2007 reminders.
  
- **Marketing campaigns**
  - **Market more effectively with personalized communications.** Create targeted mailing lists by filtering prospect and customer data—and then use improved e-mail merge with Microsoft Office Publisher 2007, Microsoft Office Word® 2007, and HTML to launch your marketing campaign.
  - **Track marketing campaign activity by customer.** Each marketing campaign you send to your contacts is automatically included in their communications history.

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- **Sales forecasting**
  - **Forecast sales and prioritize tasks.** The new information dashboard on the home page provides a customizable view of your company's sales pipeline so that you can forecast sales and prioritize activities.
  - **Identify your best opportunities.** Gain insight into your best sales opportunities by tracking prospects and customers from initial contact through closing and after the sale.
  
- **Contact management**
  - **Import contact information.** Whether you are using Office Word 2007, Office Excel 2007, Office Access 2007, or other software such as ACT!, import tools help you to quickly migrate your information to Office Outlook 2007 with Business Contact Manager.
  - **Consolidate contacts and customer information.** Gain access to all information related to each contact—including e-mail messages, phone calls, appointments, tasks, notes, and documents—from one place.
  - **Customize contact and customer information.** Capture the information that is most relevant to your sales and business processes.
  - **Share customer information with coworkers.** Provide password-protected network access and share information using a more secure multiuser feature.
  
- **Customization**
  - **Integrate with custom applications.** Using the software development kit (SDK), customize Office Outlook 2007 with Business Contact Manager to integrate with other line-of-business applications.
  
- **Offline access**

- **Stay connected when you are out of the office.** When you are on the road, you can view and enter information for all features of Office Outlook 2007 with Business Contact Manager from your portable computer and synchronize your data when you return.



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## EXPLORING THE POTENTIAL OF OFFICE OUTLOOK 2007 WITH BUSINESS CONTACT MANAGER

Interested in deploying Office Outlook 2007 with Business Contact Manager for your company or in selling it to your customers? Let's take a moment to examine its out-of-the-box functionality and take a brief look at the further possibilities:

- **Lists and Forms:**

**Out of the box:**

Tailor Office Outlook 2007 with Business Contact Manager to your business needs by adapting current forms: add, edit, or remove data fields, change label names, and modify drop-down lists.

**Further Possibilities:**

Simplify deployment across multiple locations, sales teams, etc., by exporting tailored forms and data.

- **Reports:**

**Out of the Box:**

Use standard reports to quickly gain an understanding of your business. Create custom reports within Office Outlook 2007 with Business Contact Manager and export them to Office Excel 2007 with one click.

**Further Possibilities:**

Bring together additional business data in custom reports by linking the Office Outlook with Business Contact Manager database to Office Access 2007 databases and reports.

- **Database Implementation:**

**Out of the Box:**

Organize accounts, projects, sales, and marketing information for single users.

Work with the Office Outlook 2007 with Business Contact Manager database in a shared configuration, enabling several users to work with the same data.

Easily set up a shared database on any desktop machine by following a wizard within Office Outlook 2007 with Business Contact Manager.

**Applications and Further Possibilities:**

Host your Office Outlook 2007 with Business Contact Manager database on Windows Small Business Server 2003 R2, enabling you to share data among multiple users. Extend your ability to

manage the Office Outlook 2007 with Business Contact Manager database with MicrosoftSQL Server 2005.

## IMPORTING THE SUPPLIED CUSTOMIZATION FILE

Many business software applications are too expensive for the average small business to purchase in the first place. The gap between small business needs and budgets becomes even more exaggerated when these applications must be customized to fit specific requirements. Office Outlook 2007 with Business Contact Manager addresses the needs of small businesses by providing an economical solution that includes capabilities for importing, customizing, and exporting settings and data easily.

This functionality makes data migration simple and provides a quick way to customize the forms in Office Outlook 2007 with Business Contact Manager, so data critical to everyday business is included right where you need it. As a Value Added Reseller, mastering these capabilities enables you to provide a vital service to your small business customers as you customize Office Outlook 2007 with Business Contact Manager to fit their business, and essential training for your customers as you show them how to complete further customizations themselves.

**Scenario:** Susan's company provides sales and marketing solutions for small businesses. One of Susan's clients has multiple account managers that serve different territories, and they need an account and opportunity management solution that can be tailored to their needs, is economical, and is easily deployed.

**Solution:** Susan can offer her clients Office Outlook 2007 with Business Contact Manager and create tailored sales and marketing solutions for each client. By importing these solutions at each location, Susan can set up her clients' custom environments quickly and easily.

**Details:** Office Outlook 2007 with Business Contact Manager uses two main types of files that contain customization data:

- **Office Outlook 2007 with Business Contact Manager Customization files**—.bcmx files contain customizations to Office Outlook 2007 with Business Contact Manager forms. Custom groups, fields, or lists you create in Office Outlook 2007 with Business Contact Manager will be included when you export a .bcmx file.
- **Office Outlook 2007 with Business Contact Manager Data files**—.bcm files contain both data from your Office Outlook 2007 with Business Contact Manager database (accounts, contacts, notes) and customizations to Office Outlook 2007 with Business Contact Manager forms.

# Customizing Outlook® Business Contact Manager 2007 for Technical Services

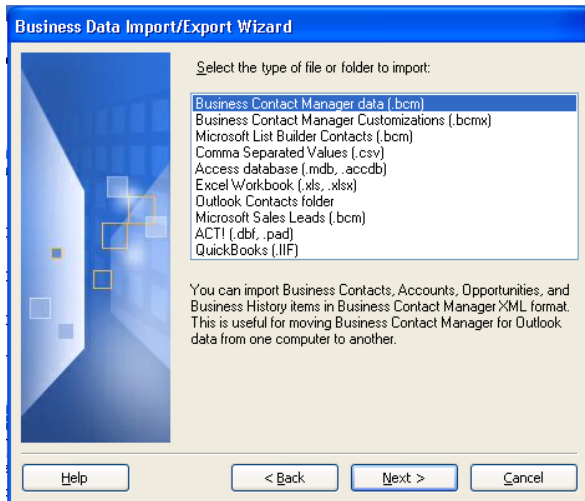
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This Action Pack includes two such files, `ExportCustomization.bcmx` and `ExportFile.bcm`, which are set up as examples for a services provider.

We're going to walk through the process of importing customizations, customizing forms and reports, and exporting these customizations in Outlook 2007 with Business Contact Manager, using the `ExportFile.bcm` file as an example. If you choose to import the file, you can explore the possibilities Office Outlook 2007 with Business Contact Manager creates for small business firsthand as you read on. If you want to get right into customizing Office Outlook 2007 with Business Contact Manager without importing the sample customization, skip ahead to "Tailoring Solutions with Office Outlook 2007 with Business Contact Manager" in the next section. Please note: We use examples from `ExportFile.bcm` to illustrate the instructions.

Let's begin by exploring the import capabilities of Outlook 2007 with Business Contact Manager, using the `ExportFile.bcm` file from your Action Pack CD as an example. This file contains customized forms and sample data.

1. If you are currently using Office Outlook 2007 with Business Contact Manager, **create a new profile before importing data or you will/may overwrite your current data.**
2. Open Office Outlook 2007.
3. Open the **File** menu; click **Import and Export**; then click **Business Contact Manager for Outlook**.
4. Make sure **Import a file** is selected; then click **Next**.
5. Select "**Business Contact Manager data (.bcm)**" and click **Next**.
  - *You'll notice there are number of other options, including files from Office Excel 2007, Office Access 2007, QuickBooks, and ACT! Working with these formats gives you great flexibility in migrating your customers' current contact data into Office Outlook 2007 with Business Contact Manager. (Figure 1.)*



**Figure 1.** Business Data Import/Export Wizard

6. Type in the path or click **Browse** to select the file you want to import. To import the file included with this action pack, browse to your CD-ROM drive and select the file called **ExportFile.bcm**. Take note of the options for dealing with duplicates and select-boxes for **Communication History and Customizations**. You may want to change these settings when importing later.
7. Click **Next** twice.
8. Office Outlook 2007 with Business Contact Manager will now import your data. When it is complete, you will have the chance to review a log for errors. Go ahead and click **Close**.

Next, we're going to explore the custom fields and data that are included in the ExportFile.bcm in order to discover the ease and power of customization in Office Outlook 2007 with Business Contact Manager.

**Power Tip:** Importing a customization file after you've configured Office Outlook 2007 with Business Contact Manager to use a shared database on a server enables you to modify these fields for all users connected to your database. Thus, adapting Office Outlook 2007 with Business Contact Manager for your customers is straightforward and efficient.

## TAILORING SOLUTIONS WITH OFFICE OUTLOOK 2007 WITH BUSINESS CONTACT MANAGER

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Let's explore the procedures used to create the ExportFile.bcm file in this Action Pack, and examine the business possibilities that creating such customizations opens up for service providers.

**Scenario:** Kevin runs Contoso, Ltd, a company that works with a number of clients in the telecommunications industry. Keeping track of technical information about each account has been haphazard at best. Kevin wants a simple solution that will enable his employees to keep track of this information in one central place. His requirements include reasonable pricing, simple deployment, painless customization, and minimal training.

**Solution:** Kevin can work with a local service provider to have Office Outlook 2007 with Business Contact Manager deployed and tailored to his specifications using form customization. He can also employ his service provider's assistance in training his staff to use the tailored solutions, and contact them if further customization work is needed in the future.

**Examples:** The User-Defined form in the Accounts screen is entirely made up of User-Defined custom fields. The fields shown in our examples below were included in the ExportFile.bcm file, and will be displayed in your copy of Office Outlook 2007 with Business Contact Manager if you've imported data from this file as outlined in the previous section. (Figure 2.)

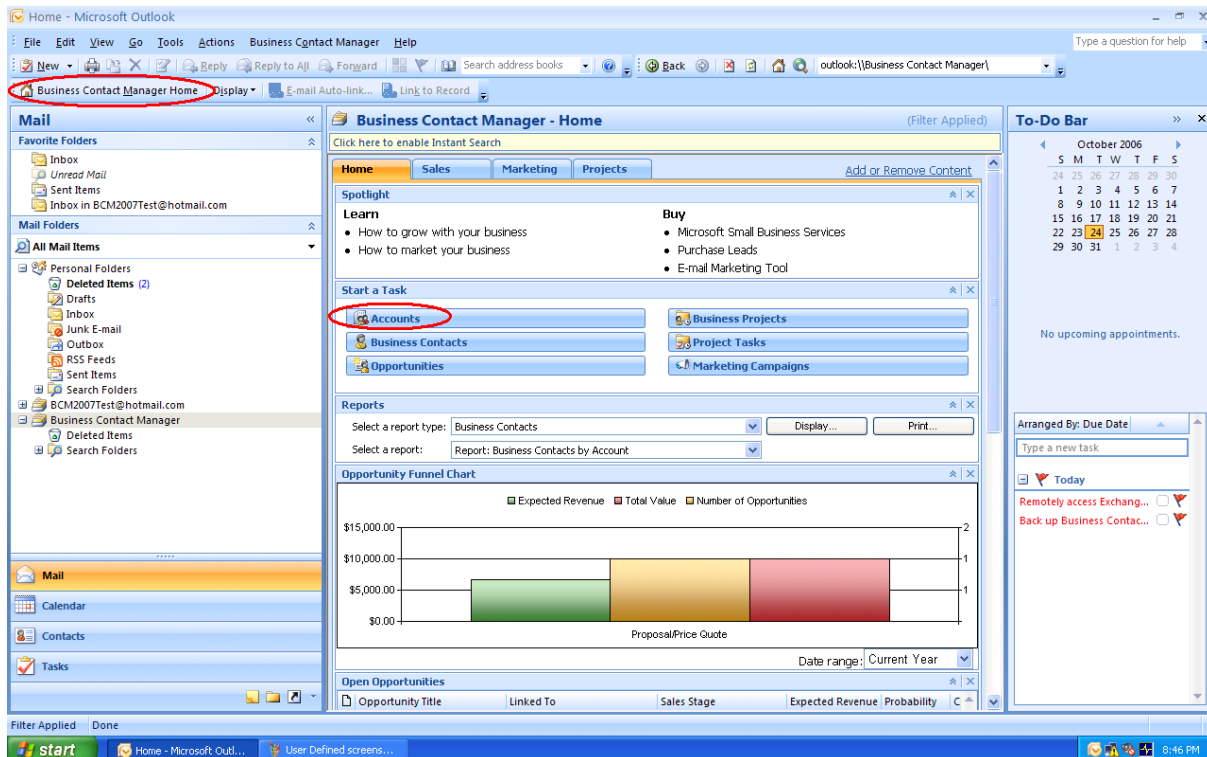
The screenshot displays the 'A. Datum Corporation - Account' window in Office Outlook 2007. The interface features a ribbon with tabs for 'Account' and 'Format Text'. The 'Account' tab is active, showing a 'User-Defined Fields' section. Below the ribbon, the form is organized into several sections:

- External IP Information:** Includes fields for Public IP Address, External Gateway, External Subnet Mask (255.255.255.0), External Primary DNS, External Secondary DNS, and External DNS Record Provider (Point to Point).
- Server Roles and OS:** Includes fields for Primary Server (SBS 2003 SP1), Member Server 1 Role (Terminal Server - Windows Server 2003 R2), and Member Server 2 Role.
- ISP Information:** Includes fields for ISP Name, DSL Username (CONTOS), and DSL Password (AR123#).
- Network Information:** Includes fields for Internal Server Address (192.168.46.2), External Server URL (https://contoso.com/remote), and Administrator Password (\*\*\*\*\*).
- Account Information:** Includes a field for Service Level (Gold Managed).

**Figure 2.** User-Defined form for Account information in Office Outlook 2007 with Business Contact Manager

**Details:** You adapt Office Outlook 2007 with Business Contact Manager to your business, tailoring the forms in which your data will be viewed. Let's take a look at modifying the groups and fields that are included in the Accounts form.

1. Open Office Outlook 2007.
2. Click **Business Contact Manager Home**; then click **Accounts**. (Figure 3.)



**Figure 3.** Selecting Accounts in Office Outlook 2007 with Business Contact Manager

3. Double-click **the contact card** for the account called **A. Datum Corporation**.
  - a. If you have not imported the **ExportFile.bcm** file, you can access the options below by creating a new account (right-click **New Account**)
4. Click **User-Defined Fields**.

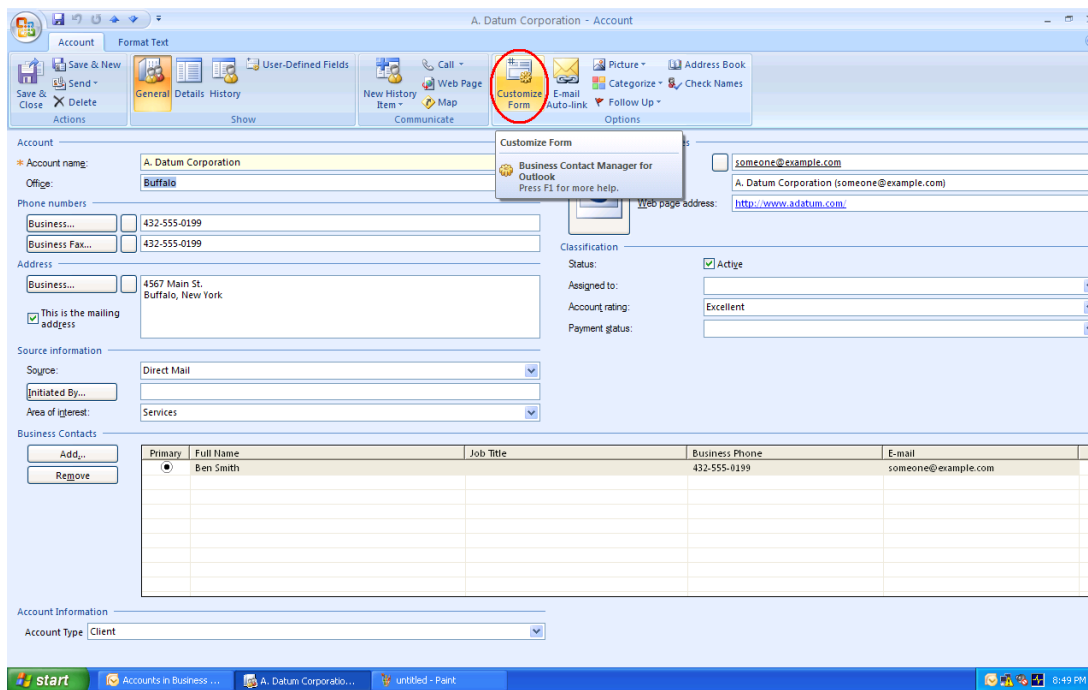
Every group, field, and list on this form may be custom defined. This can be done by creating each element by hand or by importing a .bcm or .bcmx file that includes these fields. Examples of the kind of information you could easily track for each account, opportunity, or business project were included in the ExportFile.bcm file in your Action Pack.

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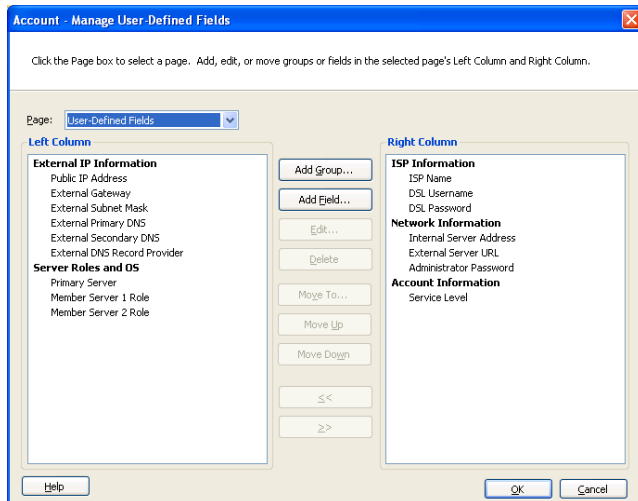
- To explore how to create and manage these custom fields, click **Customize Form** in the Options menu. (Figure 4.)

**Note:** The option to Customize Form is not exclusive to the User-Defined Fields form. The General, Details, and History forms included with Office Outlook 2007 with Business Contact Manager can also be customized.



**Figure 4.** Selecting the Customize Forms view

A new window opens up, allowing you to add, edit, or delete user-defined fields for the Accounts form. (See Figure 5.) Each form is divided into two columns. Groups or fields displayed on the left are listed under Left Column on the Customization screen, those on the right under Right Column.



**Figure 5.** Customize Fields view

Four areas can be customized for your Accounts, Opportunities, and Business Projects views in Office Outlook 2007 with Business Contact Manager. They are listed under the Page field in the Customize Fields view. (Figure 5.)

Using Accounts as an example:

- **General:** Contains general information about the selected account (account name, contact info, etc.)



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The screenshot displays the Outlook Business Contact Manager interface for an account named 'A. Datum Corporation'. The 'Account Information' group is visible in the lower-left corner, containing the 'Account Type' field, which is currently set to 'Client' and is circled in red. Other fields in the form include 'Account name', 'Office', 'Phone numbers', 'Address', 'Source information', 'Business Contacts' table, 'E-mail and Internet addresses', and 'Classification'.

Primary	Full Name	Job Title	Business Phone	E-mail
<input checked="" type="radio"/>	Ben Smith		432-555-0199	someone@example.com
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				
<input type="radio"/>				

**Figure 6.** The Account Information Group and Account Type field in the lower left corner is a custom entity that is created when the ExportFile.bcm included in the Action Pack is imported.

- **Details:** Includes a place for notes and comments on the selected account, as well as some other fields (revenue, stock ticker, etc.).
- **History:** Lists your communications history for the selected account (linked e-mails, marketing campaigns, business projects, etc.).
- **User-Defined Fields:** This form is entirely composed of groups and fields that are designated by users. (In our example, this form includes ISP name, primary server, etc.).

Within these forms, three different entities can be created:

- **Groups:** Each form is divided into different groups of fields (These show up in blue on each form.).
- **Fields:** Fields are designed to contain data. They can be set as drop-down lists, free-form text boxes, or customized to format input as numbers, currency, etc.

- **Lists:** Drop-down lists in Office Outlook 2007 with Business Contact Manager forms are customizable. Simply click on the drop-down list and select **Edit This List**.

**Note:** Editing customizations is only available while you are connected to your Office Outlook 2007 with Business Contact Manager database. Mobile users who connect to a shared database will still be able to see and edit data in custom fields, but they will not be able to edit the actual customizations while they are connecting remotely.

In order to re-create the fields our imported customization file created (or create your own custom fields) in the User-Defined Fields form, you need to follow these steps:

1. Click **Add Group** and enter the desired group name (for our first example, **Server Role and OS**).
2. Click **Add Field** and add the desired field (for our first example, **Primary Server**).
  - a. Define the field type for this field (for our first example, **Drop-down list**).
  - b. If the field type is a drop-down list, then define the items that will be included in that list (for our first example this includes **SBS 2000**, **SBS 2000 SP1**, **SBS 2003 RTM**, etc.).
3. Repeat for each group or field included in the ExportFile.bcm customization file included with this Action Pack (these fields are listed in Appendix A.).

Server Roles and OS	
Primary Server	SBS 2003 SP1
Member Server 1 Role	Terminal Server - Windows Server 2003 R2
Member Server 2 Role	
Test Field	

**Figure 7.** An example of the user-defined fields included in the ExportFile.bcm customization file

For further information about modifying forms in Office Outlook 2007 with Business Contact Manager, please refer to the Help file.

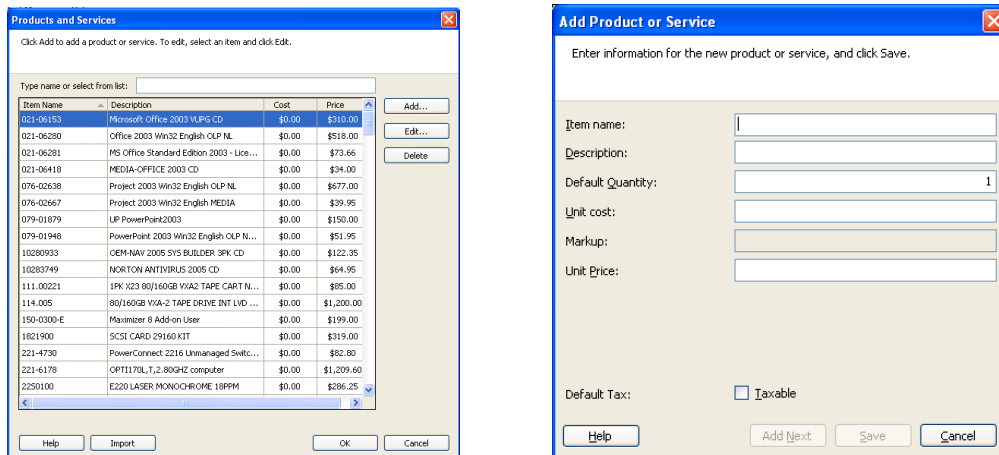
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## MANAGING THE PRODUCT AND SERVICE LISTS

Office Outlook 2007 with Business Contact Manager includes the ability to create and manage a master Product and Services list. Let's take a look at this list and note a few details.

1. Click the **Business Contact Manager** menu; then select **Product and Service Items List**.
2. If you've imported the ExportFile.bcm file, you'll notice that the list has already been populated with items. (Figure 7.) These items were included in the ExportFile.bcm file, and are added to the master Product and Services list when this file is imported.



**Figure 7.** The Products and Services items list and New Product Dialog

3. Clicking the **Add** or **Edit** buttons opens the dialog box shown in Figure 7 on the right.
4. You can import product lists from CSV (Comma Separated Values) formatted files. Many programs can export data in this format, including Office Excel 2007. An example product list, Products.csv, is included with your Action Pack.

**Note:** To be imported properly, your .csv file must contain the following fields in this order: Item Name, Description, and Unit Price. The Products.csv file included with your Action Pack provides an example of a properly formatted product and service list in CSV format and includes all of the products and services that were included in our ExportFile.bcm file.

*For further information about importing .csv formatted Product and Services lists, please review the Help file in Office Outlook 2007 with Business Contact Manager.*

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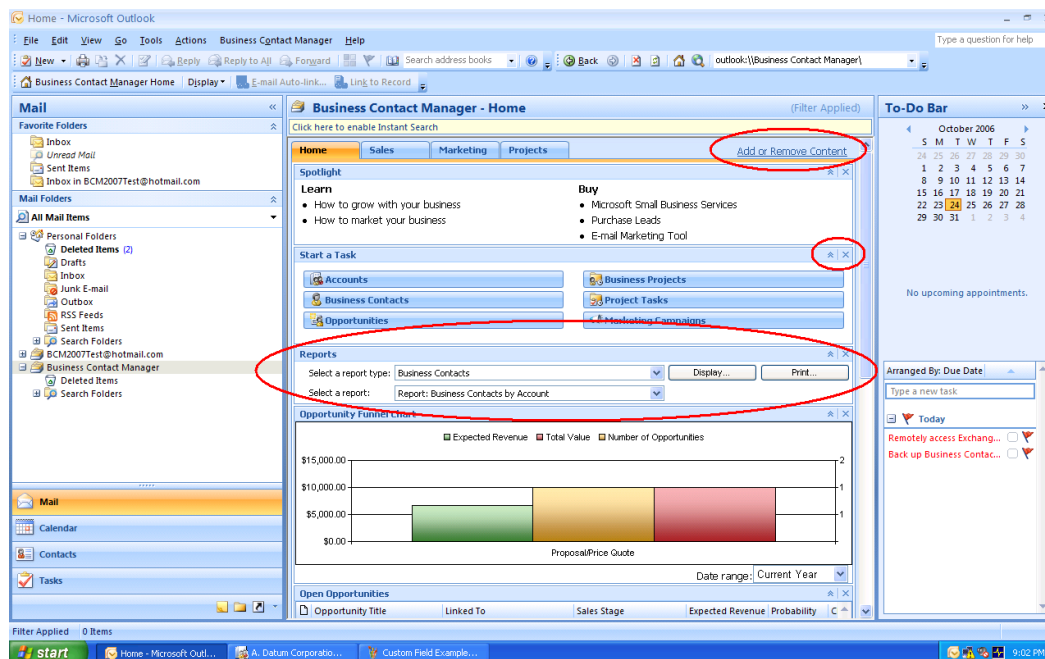
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## CREATING TAILORED REPORTS

One of the most important benefits of Office Outlook 2007 with Business Contact Manager is increased visibility of your data provided through a unique combination of reporting features:

1. **A Customizable Dashboard:** Displayed on Office Outlook 2007 with Business Contact Manager's Home Page, the built-in dashboards enable you to have vital information at your fingertips—without the need to repeatedly run reports to see this information.
2. **Customizable Reports:** A powerful set of standard reports is included with Office Outlook 2007 with Business Contact Manager, enabling you to view detailed information about your accounts, opportunities, marketing campaigns, and more without having to configure them from scratch. You can modify and save these reports easily to tailor Office Outlook 2007 with Business Contact Manager's reporting to your specific business needs.

Let's explore each of these features and the way they can help you obtain a more comprehensive view of your business and assist your customers in organizing theirs.



**Figure 8.** The customizable dashboard in Outlook 2007 with Business Contact Manager

## Customizing the Home Page (Figure 8.)

1. **Adding and Removing Content:** The dashboard in Office Outlook 2007 with Business Contact Manager is made up of individual components—reports, graphs, lists, and navigation buttons. The components listed on each dashboard can be defined by clicking the **Add or Remove Content** button in the upper right corner.
2. **Managing the dashboard display:** Each individual piece of the dashboard can be minimized or removed by using the **arrow** and **x** buttons on the right.
3. **Running reports from the dashboard:** Reports can be run from the dashboard easily by selecting a report type and specific report, then clicking **Display** or **Print**.

## Flexible Reports

Standard and tailored reports can be run easily in Office Outlook 2007 with Business Contact Manager by using the Reporting field on the dashboard, or by navigating to **Business Contact Manager**, then **Reports**, and choosing the report you want to run.

Reports can then be modified, exported to Office Excel 2007, or sent via e-mail. (Figure 9.) Tailored reports can be saved and viewed later by choosing **Saved Reports** as your report type.

Existing reports can be modified using the toolbar buttons located across the top of a report:

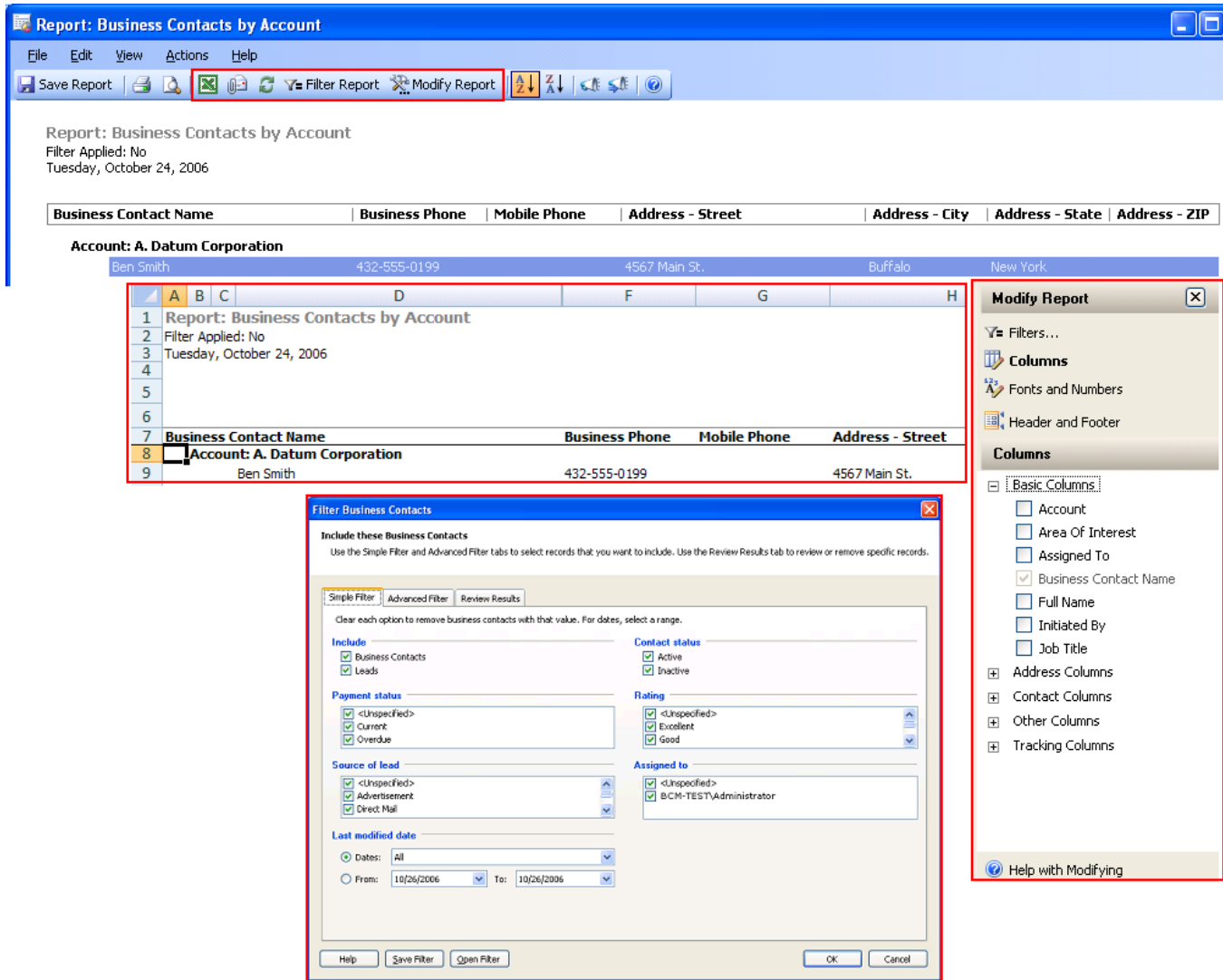
- To save a report, click the **Save Report** button on the report toolbar.

**Note:** Modified reports are saved under My Documents\My Business by default. These reports are saved in Business Contact Report (.bcr) format. Modified reports are not included in the data exported in a .bcm file. These reports will need to be copied separately when transferring data from one computer to another.

- To export a report to Office Excel 2007, click the **Excel** icon on the toolbar.
- To e-mail the report, click the **E-mail** icon.
- To filter a report (selecting which entries are displayed), click the **Filter Report** button.
- To modify a report (changing the kinds of data that are displayed; adding different categories of data, etc.), click **Modify Report**.

*For more information on the Sales dashboard and tailoring reports, please review the Help file in Office Outlook 2007 with Business Contact Manager.*

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**Figure 9.** Viewing and modifying a report in Office Outlook 2007 with Business Contact Manager, and exporting to Office Excel 2007

## Extended Reporting Capabilities

As we've discussed above, Office Outlook Business Contact Manager contains a valuable set of standard reports and provides the ability to adapt these reports extensively. There are situations, however, where you may need to view or manipulate information in ways that are different from the reports included within Office Outlook 2007 with Business Contact Manager. Let's explore a few of these situations and the solutions available.

### Exporting Data and Reports to Office Excel 2007

You can use other software you are familiar with (e.g. Office Access 2007, Office Excel 2007) to create specialized reports with data from your Office Outlook 2007 with Business Contact Manager database. You accomplish this by exporting data directly to the desired format, as is the case with Office Excel 2007, or by linking directly to the SQL database that houses your data.

**Scenario:** Jim is using Office Outlook 2007 with Business Contact Manager to organize his business. He has customized some of the reports in Office Outlook 2007 with Business Contact Manager extensively to fit his business needs, but sometimes finds that he wants the data in his reports to be more accessible visually. For example, he has created a report showing the status of support calls that his customers have made to his business, but wants to highlight those calls that require attention.

**Solution:** Jim can export his report to Office Excel 2007 (Figure 10.) and take advantage of Office Excel 2007's extensive formatting abilities, including data sorting and filtering, Pivot Table creation, and conditional formatting.

The report below gives an example of the formatting power of Office Excel 2007 (Figure 10.) The data on this report is filtered to show only data for 2006 and sorted by Due Date. Conditional formatting was used so Office Excel 2007 will display the appropriate color for each task based on its due date. View this report directly in Office Excel 2007 by opening the **Support Call Report.xlsx** file on your Action Pack CD.



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Support Call Report.xlsx - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

Clipboard Font Alignment Number Styles

Security Warning Data connections have been disabled Options...

	A	B	C	D	E	F	G	H	I
1	FullName	TodoTitle	DateCompleted	hours	Due				
2	Contoso, Ltd.	Call Keith to discuss project	7/4/2006	11.5	6/26/2006				
3	A. Datum Corporation	Arrange New Internet Live	7/4/2006	1	6/27/2006				
4	Contoso, Ltd.	Check monitor at next visit	7/8/2006	2	7/10/2006				
5									
6									
7									
8									

**Figure 10.** An example of conditional formatting in Office Excel 2007

For more information on importing Office Outlook 2007 with Business Contact Manager data into Office Excel 2007, please refer to:

<http://msdn2.microsoft.com/en-us/library/aa719403.aspx>

For more information on Sorting, Filtering, Pivot Table, and Conditional Formatting functions in Office Excel 2007 please refer to Help resources in Office Excel 2007.

## Using Office Access 2007 to Extend Reporting Capabilities

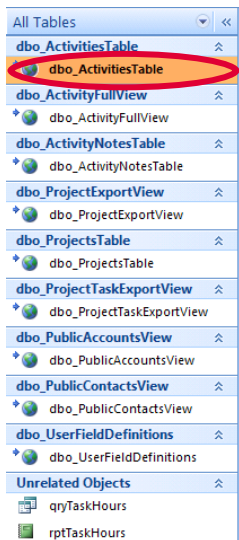
**Scenario:** Victoria uses Office Outlook 2007 with Business Contact Manager to manage her business. She wants to generate invoices by analyzing the billable hours her company has spent supporting each of her customers. She hasn't been able to figure out how to do so with the reports included in Office Outlook 2007 with Business Contact Manager.

**Solution:** Victoria is familiar with managing databases in Office Access 2007. She can create a database in Office Access 2007 that dynamically links to data in her Office Outlook 2007 with Business Contact Manager SQL database, allowing her to manipulate her Office Outlook 2007 with Business Contact Manager data as she pleases, creating exactly the report she needs. She can even export data from Office

Access 2007 to Office Excel 2007 if she needs to take advantage of Office Excel 2007's formatting options (as we've explored above).

A sample Office Access 2007 Database, entitled "BCMAccess.accdb," is included in your Action Pack CD. When you open this database file, you will see a number of dbo items listed under All Tables in the left toolbar (Figure 11). Each table in this database is linked to data in the Office Outlook 2007 with Business Contact Manager SQL database through a data source. To display data currently in your Office Outlook 2007 with Business Contact Manager SQL database, you'll need to refresh these tables.

1. Right Click the **dbo\_ActivitiesTable** item.
2. Select the **Linked Table Manager** option.
3. Select the tables you want to update (in our case **Select All**), then click **Ok**.
4. Double-clicking the **dbo\_ActivitiesTable** or any other table will now display all of the information currently contained in the linked table in your Office Outlook 2007 with Business Contact Manager SQL database.



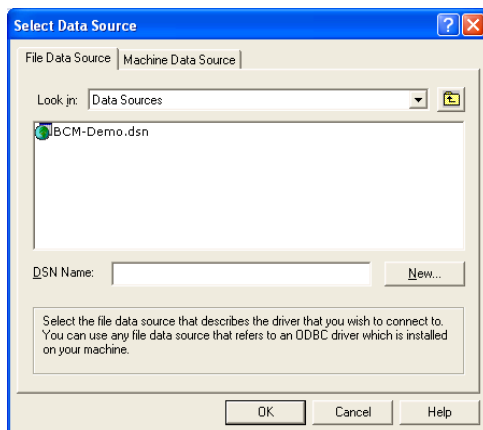
**Figure 11.** Tables currently available in the Office Outlook 2007 with Business Contact Manager Office Access 2007 sample database.

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Once you have updated the tables in this example database, a new query (qryTaskHours) and a new report (rptTaskHours) will be created under dbo\_ProjectTaskExportView and dbo\_PublicAccountsView. Double-clicking the object for each query (or report) will display the information returned from the query (or report). In our example, the report contains one entry for A. Datum Corporation showing 0 hours.

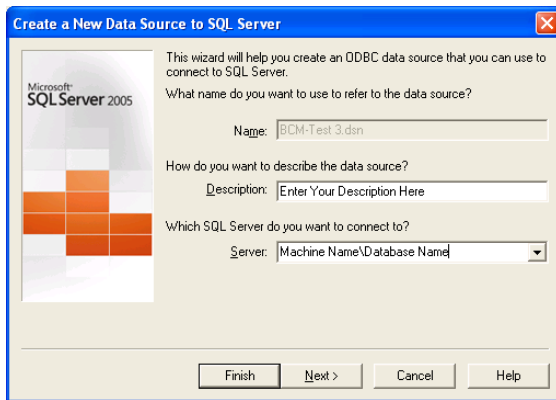
In order to create similar linked tables in your own Office Access 2007 database, you will need to walk through the wizard for importing data from an ODBC data source under **More** on the **External Data** menu. A few specific notes on completing this process successfully with the Office Outlook 2007 with Business Contact Manager database are included below:



**Figure 12.** Data source selection in Office Access 2007

1. Click the **New** button to create a new data source, select **SQL Native Client**, and then click **Next**. (Figure 12.)

**Note:** The default location for data sources is C:\Program Files\Common Files\ODBC\Data Sources



**Figure 13.** Creating a new data source

2. Enter a description you will remember and identify the SQL Server you want to connect to, and click **Next**. (Figure 13.)

**Note:** The convention for this is "Machine Name\Database Name" as shown above. Machine Name should be the name of the machine where your Office Outlook 2007 with Business Contact Manager database is stored. Database Name should be the name of your Office Outlook 2007 with Business Contact Manager database. The default name is "MSSMLBIZ."

3. When available, be sure to check the option to **Change the Default Database to:** and select **MSSmallBusiness** from your options.

**Note:** Links created to your data source work both ways. Thus, updates made to the Office Outlook 2007 with Business Contact Manager SQL database will be propagated to your Office Access 2007 database, and updates you make to your Office Access 2007 database will be reflected in the Office Outlook 2007 with Business Contact Manager SQL database.

For more information on linking to SQL data in Office Access 2007 and ODBC Data Sources, please reference:

<http://msdn2.microsoft.com/en-us/library/aa719402.aspx>

Also, you can import information into Office Access 2007 using .csv files. These procedures are simpler than the process required to successfully link Office Access 2007 tables to SQL data as described above. The tradeoff is that both an import and an export procedure will have to be completed any time you want to update your Office Access 2007 database with new data.

In order to complete this process, first export your data to a .csv file. (See our section on Exporting Customizations.) Once completed, use the External Data menu in Office Access 2007 to import the .csv file.

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**Power Tip:** This same process can be used to import data into Office Access 2007 from a .bcm file if that is all you have available. To import data from a .bcm file into Office Access 2007, first create a copy of your .bcm file, and then rename it, changing the extension to .xml. Office Access 2007 can import data directly from XML files under the External Data menu. Since a .bcm file is formatted as .xml, modifying the .bcm file in this way allows Office Access 2007 to import data directly from it.

## EXPORTING TAILORED SOLUTIONS FOR CUSTOMERS

A key feature of Office Outlook 2007 with Business Contact Manager is the ability to transfer form customizations and data from one installation of Office Outlook 2007 with Business Contact Manager to another. Exporting your customizations and data for reporting purposes or use in other third-party programs is also straightforward.

**Scenario:** One of Jennifer's clients is a company that is in the process of upgrading all of its computer systems. This company employs a number of independent account managers, each of whom manages a separate list of accounts. At Jennifer's suggestion, each of the account managers has been working with Office Outlook 2007 with Business Contact Manager for the past year. As part of the upgrade, these account managers will need to transfer the data they have been gathering on their accounts to their new computer systems.

**Solution:** Jennifer can help the account managers export the data and custom forms from each account manager's system, then assist them in importing these settings and data once they have Office Outlook 2007 with Business Contact Manager installed on their new systems. Each of these processes can be performed easily by following a wizard in Office Outlook 2007 with Business Contact Manager.

**Details:** In order to complete this process successfully for her clients, Jennifer will need to know the basic procedures for exporting from Office Outlook 2007 with Business Contact Manager, the kinds of files she can export, and which file type will be the most appropriate for her situation. Follow the steps below for a brief orientation on exporting information from Office Outlook 2007 with Business Contact Manager:

1. Open the **File** menu, and then click **Import and Export**, then **Business Contact Manager for Outlook**. Make sure **Export a file** is selected, then click **Next**.
2. You can export three kinds of data from Office Outlook 2007 with Business Contact Manager:
  - **.bcmx:** .bcmx files contain customizations to Office Outlook 2007 with Business Contact Manager forms. Additional groups, fields, or lists you create in Office Outlook 2007 with Business Contact Manager will be included when you export a .bcmx file. This format is useful for installing Office Outlook 2007 with Business Contact Manager and importing tailored forms to a different computer without any data (e.g. for a sales manager taking over a newly established territory).
  - **.bcm:** .bcm files contain both data from your Office Outlook 2007 with Business Contact Manager database (accounts, contacts, notes) and customizations to Office Outlook 2007 with Business Contact Manager forms. When exporting to a .bcm file, you have the option to

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choose to export all data or specific data. This format is useful for importing data and customizations into another installation of Office Outlook 2007 with Business Contact Manager.

- **Comma Separated Values (.csv file.):** You can export data from Office Outlook 2007 with Business Contact Manager as a .csv file, which can be opened with Office Excel 2007, enabling further possibilities for sorting, filtering, and reporting. In addition, you can import .csv files into an SQL database, making data transfer to a new database hosted on Windows Small Business Server 2003 R2 possible.
3. Walk through the wizard, making sure to choose the content and export location that will provide the most useful data for you and store the export file in a convenient location.

**Note:** If you don't need data from your database, export to a .bcmx file—this will include only the customizations. If you want data from your database and customizations included, use a .bcm file.

The ExportFile.bcm file included with this Action Pack contains three sets of data:

1. **Customization Data.** Information needed to re-create customized forms, including groups, fields, and lists
2. **Business Data.** Account information, contact information, and other data included in each form
3. **Products and Services List data.** Products, services, and other information included on your Products and Services List

Once you have created custom forms, entered data relevant to your business, and created a Products and Services list, you can create your own customization file that includes form customizations, business data, and your Products and Services list, by following the export steps outlined above. You'll then be able to use this tailored file to create a customized solution for your business or your customers, and take important steps toward realizing the full potential of your business with Office Outlook 2007 with Business Contact Manager.

*For further instructions on how to export information, please refer to the Help file in Office Outlook 2007 with Business Contact Manager.*

## MANAGING THE OFFICE OUTLOOK 2007 WITH BUSINESS CONTACT MANAGER DATABASE

Office Outlook 2007 with Business Contact Manager's SQL database is configured for individual use if the default settings are used when installing Office Outlook 2007 with Business Contact Manager. Thus, by default, the database will be hosted on the user's local machine, and does not have sharing enabled.

Alternatively, you can set up the Office Outlook 2007 with Business Contact Manager Database for shared access by either:

1. Completing the Database Sharing Wizard included in Office Outlook 2007 with Business Contact Manager
2. Configuring your Windows Small Business Server 2003 R2 to host the database using MicrosoftSQL Server 2005.

Configuring an Office Outlook 2007 with Business Contact Manager database with shared access allows multiple users to store data in the same database—a typical situation for many small businesses, where information about accounts may need to be shared between multiple account representatives and managers.

**Scenario:** Sean has been exploring options for helping his company organize its business. He has been experimenting with Office Outlook 2007 with Business Contact Manager on his own, and would like to understand how Office Outlook 2007 with Business Contact Manager can be configured for shared use with multiple users.

**Solution 1.** If Sean's company has limited server resources, Sean can install Office Outlook 2007 with Business Contact Manager on one of its networked computers, and then configure it for a shared database from within Office Outlook 2007 with Business Contact Manager.

**Solution 2.** If Sean's company already has a server with Windows Small Business Server 2003 R2 installed, he can work with his systems administrator to configure this server as a host for the Office Outlook 2007 with Business Contact Manager database.

Let's explore Sean's options in more detail:



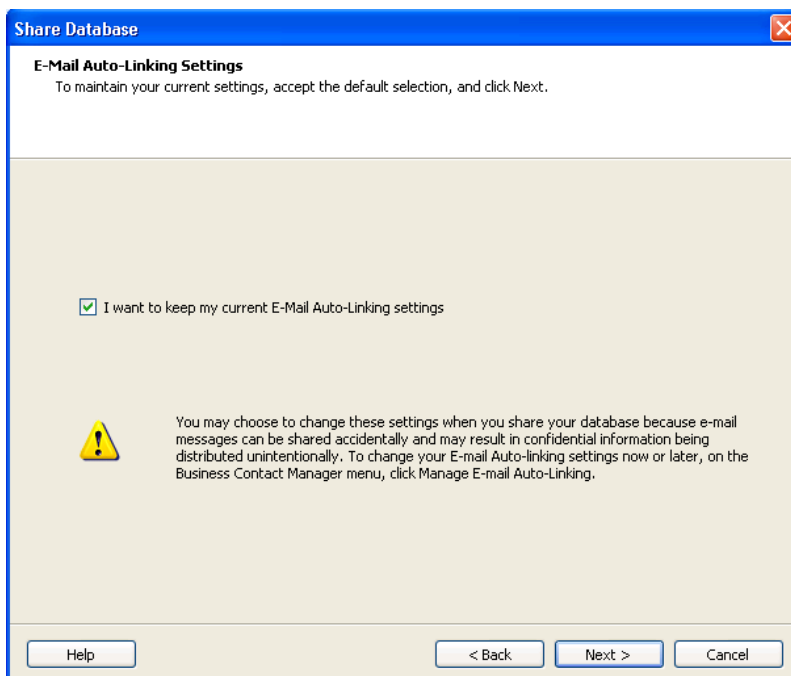
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## Shared Database Configuration within Office Outlook 2007 with Business Contact Manager

The simplest method of configuring Office Outlook 2007 with Business Contact Manager for multiple users is to install it on one computer that will act as the database "server." The database can then be configured for sharing using the Database Sharing Wizard within Office Outlook 2007 with Business Contact Manager. This setup is relatively easy to do, and will be sufficient for many small businesses' needs. This method is discussed in detail below.

1. From the **Business Contact Manager** menu, select **Database Tools**, and click **Share Database**.
2. Select **I Want to Share My Data** and note whether you want to share it with other users on your local machine or across the network.
3. Specify whether you want to keep your current **E-Mail Auto-Linking** settings (Figure 14.)



**Figure 14.** E-mail Auto-linking

**Note:** E-mail auto-linking is disabled by default when sharing is enabled for the database. This is done for privacy purposes, as e-mails that are linked automatically become visible for all users with database access (in Business History and in individual Accounts or Business Contacts.)

4. Grant access to users by specifying their accounts and identifying their roles.

**Note:** Only the database owner can make any changes to the database, such as backing it up, deleting it, choosing to share it, or making it private. The database owner is the user who creates the database.

5. Configure your firewall to allow remote users access to the database (this is done automatically if you are using Windows Firewall, although you can review and change the settings if necessary.).
6. Review the list of users that will be granted access to the database, then click **Finish**.

**Note:** Office Outlook 2007 with Business Contact Manager uses an SQL Server 2005 Express engine for its database, which allows for multiple simultaneous database connections.

If you need to make any changes to your database configuration in the future, you can do this under the Business Contact Manager menu by browsing to **Database Tools**, then selecting **Manage Database**.

*For more information on managing a shared Business Contact Manager database, including configuration, permissions, error checking, and backup procedures, please refer to the Help file in Office Outlook 2007 with Business Contact Manager.*

## SHARED DATABASE CONFIGURATION USING MICROSOFT WINDOWS SMALL BUSINESS SERVER 2003 R2

Companies that already employ a server running Windows Small Business Server® 2003 R2 can configure their server to host the Office Outlook 2007 with Business Contact Manager database. Such a configuration provides a more robust infrastructure for integration with other software, including dynamic connections to SharePoint®, custom e-mail deployment, and many others.

**Note:** Microsoft does not support installation of Office Outlook 2007 and Microsoft Exchange® 2007 components on the same machine, so this first method is not supported on Windows Small Business Server 2003 R2 and other Server products. For more information, see the following Knowledge Base article: <http://support.microsoft.com/default.aspx?scid=kb;EN-US;266418>

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## Steps to successfully hosting the Office Outlook 2007 with Business Contact Manager Database on Windows Small Business Server 2003 R2

A database administrator should complete the following steps in order to set up Windows Small Business Server 2003 R2 to host your Office Outlook 2007 with Business Contact Manager database. They have been included here to give you a general orientation on these steps; for detailed information on this process, please review bcm\_sql.doc, which is available here:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=f24267ee-9ad5-4be5-b888-c9a50ae395ca>

1. Install **SQL Server 2005 Service Pack 1** on the desired Small Business Server.
2. Configure SQL Server 2005 for **Network Access**.
3. Set up permissions for creation of the database.
4. Set up the Office Outlook 2007 with Business Contact Manager database.
  - a. Create a new database.
5. Obtain the SQL script for creation of the Office Outlook 2007 with Business Contact Manager database.
  - a. If Office Outlook 2007 with Business Contact Manager is installed on a client computer, you can obtain this file—named **db\_create\_script.sql**—from the installation folder. Assuming Office Outlook 2007 with Business Contact Manager was installed in the default folder, this file location is: *%ProgramFiles%\Microsoft Small Business\Business Contact Manager*.
6. Configure the new database:
  - a. To populate the database, run the following commands.
    - i. `sqlcmd -S .\%INSTANCENAME% -E -d %DBNAME% -i "%PATH%\db_create_script.sql" -b`
  - b. Then, run the following 3 commands subsequently:
    - i. `sqlcmd -S .\%INSTANCENAME% -d %DBNAME% -E -Q "Update OrgTable Set SharedServer = N'%MACHINENAME%'"`
    - ii. `sqlcmd -S .\%INSTANCENAME% -d %DBNAME% -E -Q "Update OrgTable Set OrgName=N'%DBNAME%'"`
    - iii. `sqlcmd -S .\%INSTANCENAME% -d %DBNAME% -E -Q "Update OrgTable Set LocaleID=N'%LOCALEID%'"`
7. Share the new database.

8. Be prepared to back up and restore data on the Small Business Server.

## USING E-MAIL SCRIPTING WITH OFFICE OUTLOOK 2007 WITH BUSINESS CONTACT MANAGER

With some Office Outlook 2007 VBS scripting, you can configure Office Outlook 2007 with Business Contact Manager to generate e-mail messages based on events you define.

**Scenario:** Jim, the service manager for A. Datum Corporation, wants to send an e-mail notification to technicians when the status of a case they are assigned is updated.

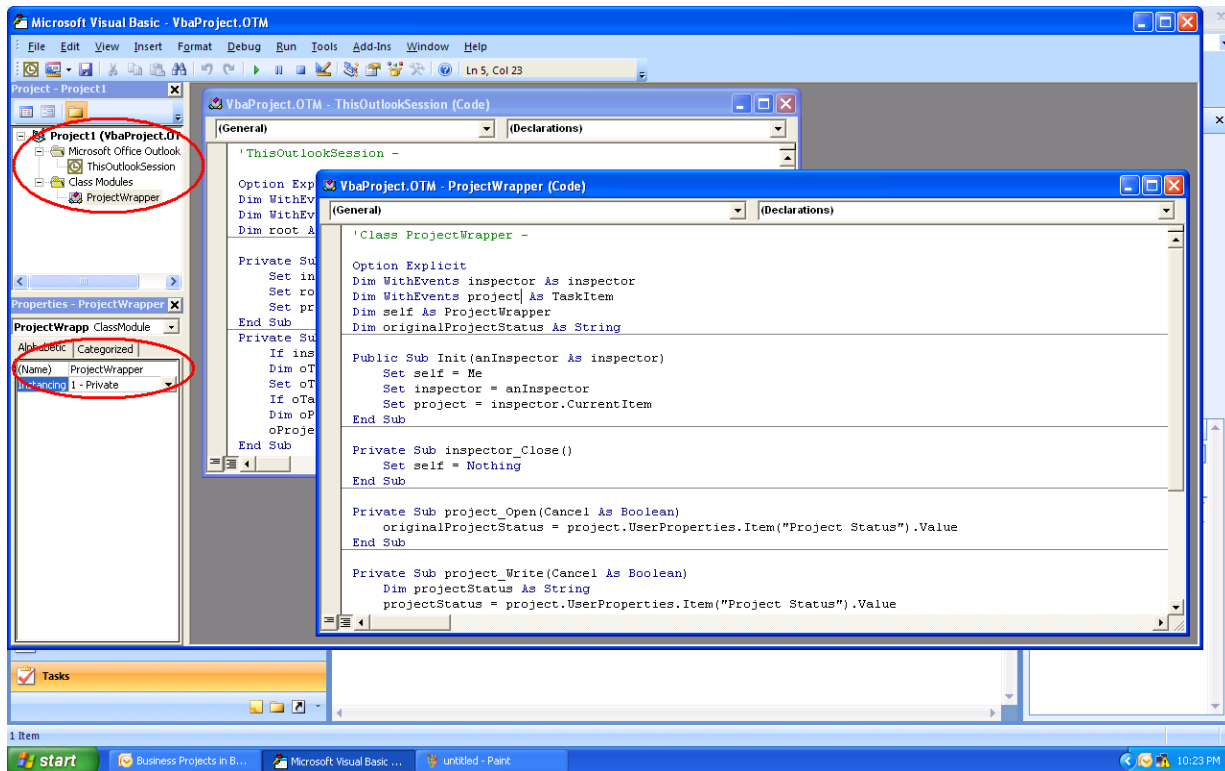
**Solution:** Since A. Datum Corporation currently uses Office Outlook 2007 with Business Contact Manager to manage their support cases, Jim can work with his local service provider to have this functionality added.

The customized version of Office Outlook 2007 with Business Contact Manager included with this Action Pack contains an example of this scripting functionality. To see it in action, do the following:

1. Create a digital certificate for VBA Projects by browsing to **Start, Microsoft Office, Microsoft Office Tools**, then **Digital Certificate for VBA Projects**.
  - a. This digital certificate will only work on the machine you create it on, as it will not be authenticated.
2. Open Outlook's **Visual Basic Editor** by browsing to **Tools, Macro**, then **Visual Basic Editor** or **Alt-F11**.)
3. Insert code from the **UpdateProjectNotify.vbs** script in two places:
  - a. Code listed under **This Outlook Session** should be placed in **This Outlook Session**. (Figure 15.)
  - b. Code listed under **Class ProjectWrapper** should be placed in a new **Class Module**, which should be named **ProjectWrapper**. (Figure 15.)

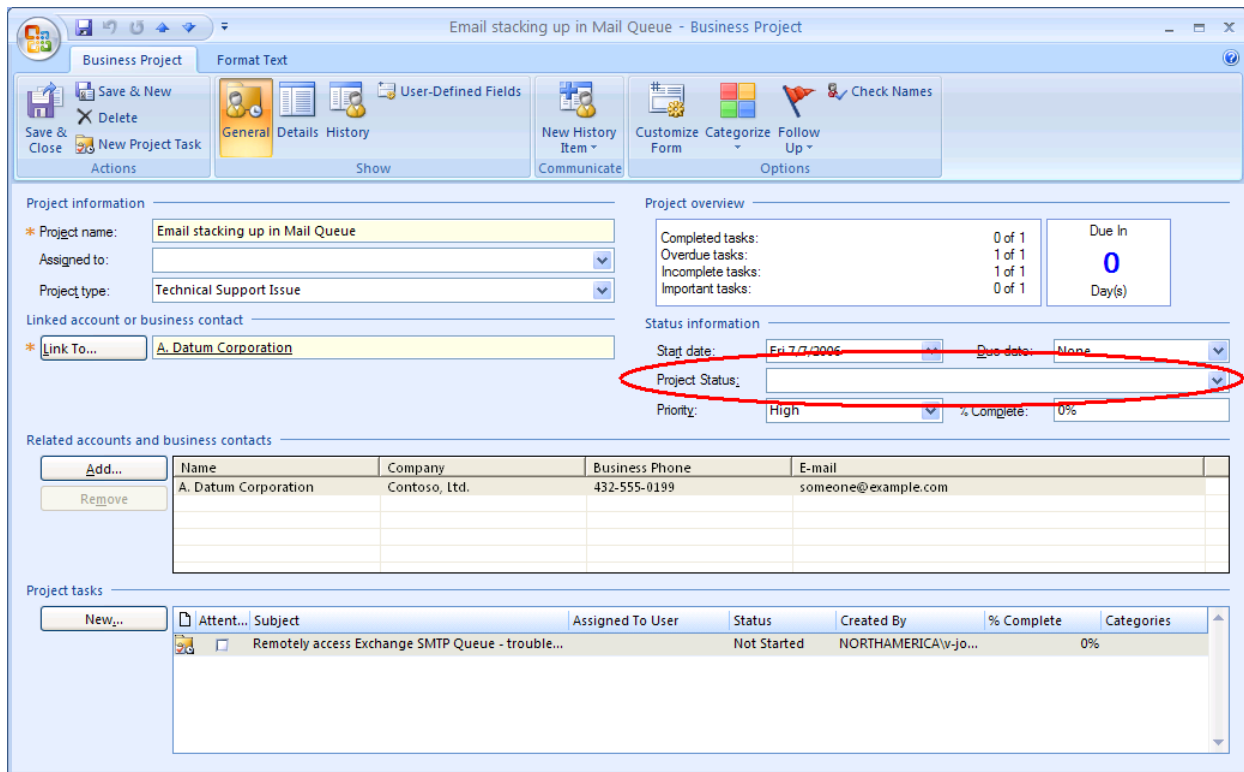
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**Figure 15.** The Office Outlook 2007 Visual Basic Editor

4. Select your project's .VBA file, and digitally certify it by choosing a certificate under **Tools, Digital Signature**.
5. Save the script.
6. Close the Outlook Visual Basic Editor.
7. Close and restart Outlook.
8. A dialog box entitled "Microsoft Office Outlook Security Notice" will appear, warning you that the publisher has not been authenticated on a script or macro that is trying to run. Click **Enable Macro** to allow your script to run.
9. Navigate to **Business Projects** from your Business Contact Manager Home.
10. Open a **Business Project**.
11. Update the status of your **Business Project**. (Figure 16.)



**Figure 16.** Updating Project Status in Office Outlook 2007 with Business Contact Manager

12. Save and close the project.
13. Have the person to whom the project was assigned check their e-mail to verify that they have received it.

**Note:** This demonstration script will only send e-mail successfully if the user that a project is assigned to is listed as a contact under your Global Address List or in your personal Contacts list. You will need to create a contact if one does not exist.

For more information on automating events in Office Outlook 2007 (such as generating event-based e-mail notification) please refer to: <http://msdn2.microsoft.com/en-us/library/aa432009.aspx>

# Customizing Outlook® Business Contact Manager 2007 for Technical Services

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## SUMMARY

Office Outlook 2007 with Business Contact Manager 2007 can contribute to your business success as you help your small business customers realize their sales, marketing, and customer service goals.

- By customizing forms and fields, you can tailor solutions specific to your customers' unique needs.
- In addition, by using the import/export function, you can quickly and efficiently deploy the tailored solution throughout your customers' sales and service organizations.
- Sales and service data vital to managing your business will be stored online in a common tool, eliminating the multiple systems and "islands of data" so common to small businesses.
- With your customers' data in one place, they can quickly produce reports and dashboards to tell at a glance how they are doing and what they need to do to improve performance.
- You can integrate Office Outlook 2007 with Business Contact Manager Data with software and tools with which you are already familiar, such as Office Excel 2007 and Office Access 2007. This extends the reporting capabilities of Office Outlook 2007 with Business Contact Manager, further enhancing its value to your customers.
- You can integrate Office Outlook 2007 with Business Contact Manager with other Microsoft server-based software such as Windows Small Business Server 2003 R2 to give your customers more sophisticated control of their information and provide a way to share data across departments and locations.
- With some programming, you can tailor Office Outlook 2007 with Business Contact Manager to improve your customers' communications processes by triggering event-based e-mail notifications and alerts, so that their staffs are alerted to items that require follow-up or other actions.
- You can use the included customization files to see firsthand how tailoring works and perhaps find that it can help your sales, marketing, and customer service activities.

## Appendix A: Fields added by the ExportFile.bcm customization file included in the Outlook 2007 with Business Contact Manager Action Pack

### Accounts

Public IP Address
External Subnet Mask
External Gateway
External DNS 1
External DNS 2
External DNS Record Provider
ISP Name
ISP Username
ISP Password
Internal Server Address
External Server URL
Administrator Password
SBS Server software level (Gold, SP1, R2)
Primary Server Role
Member Server 1 Role
Member Server 2 Role

### Projects

Project type:	<ul style="list-style-type: none"> <li>a. System integration</li> <li>b. Support case</li> <li>c. Consulting</li> </ul>
Task type:	<ul style="list-style-type: none"> <li>a. Onsite</li> <li>b. Remote</li> <li>c. Telephone</li> <li>d. Maintenance</li> <li>e. Network Administration</li> </ul>
Category:	<ul style="list-style-type: none"> <li>a. Billable</li> <li>b. Invoiced or Time Submitted</li> </ul>



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