

MyWorkSet Help

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Introduction

Welcome to MyWorkSet!

Your choice of MyWorkSet clearly shows you want to manage your contacts better and increase sales. We will provide you all the support you will need.

For further questions and info,

Call us on **07066839654** or send us an email at **info@myworkset.com**

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Getting Started

Getting started on MyWorkSet is pretty straightforward. Click on topics on the left bar (Table of Contents) to view details.

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System requirements

You do not have to bother about hosting and other issues that may arise with hosting.

As we take full care of all the technical issue.

You only need a PC or tablet, plus an Internet connection

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Account Creation

Getting Started with MyWorkSet

1. Simply visit www.myworkset.com
2. Click on [Sign up](#)
3. Fill the form correctly and submit. A verification email will be sent to your email address
4. Check your Inbox (you may check your Spam folder too) and follow the steps in the email to verify your email.
5. Login to your account
6. Top up your SMS accounts right away. For payment details and SMS pricing, [click here](#).
7. Also, top up your email accounts to enable you send emails. For payment details and email pricing, [click here](#)
8. You can now enjoy all the features on MyWorkSet.

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Modules

MyWorkSet has several modules namely:

- Contact Manager
- Email Campaign Module
- SMS Campaign Module
- Hosted Forms
- Tasks
- Referrals and Rewards

- API
- Teams and Roles

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Contacts

In this module you can setup, import and manage all details relating to your contacts.

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Categories

On MyWorkSet, records must be organized in categories and sub-categories to fit your contact style and type.

To create a category, Click on Categories under Contacts, on the right bar (on desktop) you can quickly add one or more categories.

To add a category,

1. Type the category name or if you are adding multiple categories, choose the "Add Multiple Categories at Once" radio button and type each category per line.
2. You may enter description for the category being created
3. If you are creating a sub- category, choose the parent from drop-down. If the parent category already has records under it, the records will be moved under the new category.

To edit,

1. Click the View and Edit button besides the category you want to edit. This is only visible when you bring your cursor close to the category.
2. A popup will load where you can edit category name, description and parent category.

Other tasks you can perform include:

- Deleting a category
- Copy a category
- Move a category

To perform any of these actions, you must check the box besides the category.

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Importing or Adding Contacts

Now you have created your categories, you are ready to create new contact records.

There are 4 ways of adding new records on MyWorkSet

1. Using the form

- Click on Create Record link under Contacts
- Fill up the contact details
- You must select at least a category. A contact can belong to multiple categories. To add a contact to multiple categories, hold down your Ctrl key and click on categories to highlight or Shift key to select contiguous. If your category is yet to be created, then simply click on "Create New" in the category box. After creating the new category, the category will be added automatically to the list.
- You may enter either an email or phone number or both.

- If the contact was referred by someone, type the referrer's name in the Referrer textbox to see options. If referrer is not in the options, create Referrer's record first before proceeding.
- Click Upload when you are done.

2. Importing from an Excel file

- Click on Import from File/Email under Contacts
- To import records from Excel sheet, arrange the records in [this format](#). The first row must identify the column name and must be correct. Record type, category and email must not be blank
- Choose the category you are inserting into or create a new contact category by selecting - Create New - under Choose Category select menu
- Leave Upload Type as "Full Excel Import"
- Choose "Do not prompt, just upload" if you want application to ignore duplicates.
- Then click import
- On error, the import terminates and shows you the line or range of lines associates with the error.

3. Importing only phone numbers from a text file

- Click on Import from File/Email under Contacts
- Choose the category you are inserting into or create a new contact category by selecting - Create New - under Choose Category select menu
- Select the text file (you may type your contacts with Notepad or any other text editor). The text file should contain the phone numbers you want to import with one phone number per line.
- Choose Phone only as Upload Type
- Under Choose Separator, leave as New line if you have one phone number per line or choose separator if you are using another separator type.
- Choose "Do not prompt, just upload" if you want application to ignore duplicates.
- Then click import

4. Importing only email addresses from a text file

- Click on Import from File/Email under Contacts
- Choose the category you are inserting into or create a new contact category by selecting - Create New - under Choose Category select menu
- Select the text file (you may type your contacts with Notepad or any other text editor). The text file should contain the email addresses you want to import with one email address per line.
- Choose Email only as Upload Type
- Under Choose Separator, leave as New line if you have one phone number per line or choose separator if you are using another separator type.
- Choose "Do not prompt, just upload" if you want application to ignore duplicates.
- Then click import

5. Importing from Gmail

- Click on the Google Import image on the Import Records page under Contacts.
- If you will be requested to login to Gmail (if not logged in already)
- You will be requested to grant permission to the application. No information or detail can and will be stored. OAUTH is used which is a secure authentication protocol.
- Choose the category you want to import into on the next screen; you can also choose the contacts you want to import and click the Import button.
- When complete, it shows the total number of records imported.

6. Using our API

- This API enables you automatically collect and manipulate data from different sources such as websites, forms, etc and they are automatically saved in the right categories without your intervention. For instance, the contact us form on your website can be made to save directly to MyWorkSet alongside the usual email and database.
- To setup this basic programming knowledge maybe required.
- Visit link for details on how to integrate our [API](#)

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Export Contacts

You own all your data on MyWorkSet. There is no restriction of when and what you can export. You can export your entire contacts at any time.

How to Export Contacts

- Click on Export contacts under Contacts tab. or simply [click here](#)
- By default, all contact categories and contact details is selected.
- You can leave as it is if you want to export all contacts or choose specific contact categories you want to export.
- Click the Export button and Save the Excel file.

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Search

Searching for contacts on MyWorkSet is a breeze. If you are searching for a particular record with name, email or phone, simply click on Contacts and use the top right textbox to search.

If you need an advanced search, click on [Search Records](#) under Contacts, set your search criteria and click Search. Use can use different combinations to get the exact group of records you are looking for example: You can search for people with a particular surname that are ladies living in Lagos.

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Notes

Notes are like messages associated to a contact. Find below examples of what notes can be used for:

1. Drop activities on a contact, this may come in handy when you want to view history of activities with a contact such as when contact visited, what contact wants, contact complaints, contact requests among other things.
2. Attach files to a contact for future reference.

How to Create a note

- **Method 1**
 - Click on Notes under Contacts,
 - Search for the contact using the textbox on top left,
 - click on the contact record you want to add a note to
 - Type the note you want to create.
 - You can add an attachment too.
 - Then click on Create Note button
- **Method 2**
 - Click on View Contacts under Contacts,
 - Search for the contact,

- click on the contact record you are adding note to, Click on Notes.
- Type the note you want to create.
- You can add an attachment too.
- Then click on Create Note button

When a note is dropped on a contact you are following, you will receive an email. Follows will be explained further in subsequent chapters.

To view latest Notes

Under Contacts, click Notes.

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Actions

Actions are like "contact based reminders" ie. a reminder telling us to do something about a contact at a set time and date

To create an action on a contact, do the following:

- Click on the Contact record
- Click on Actions or View/Create Actions
- Type action details
- Choose action day and type action time in HH:MM:SS format.
- Select when you want to be notified, example: 1 or 2 hours before action time. This enables you to get ready before action time if need be.
- Choose whom you want notified: You (action creator, checked by default), another user in your account (user accounts using your same MyWorkSet account or type a phone number to receive the reminder (for this last option to work, you must have SMS credit)
- Then click Create Action

Important Notes

The action date must be a date in the future. The submission will fail if it is a date or time in the past.

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Customer Management

MyWorkSet provides you sets of tools of managing and interacting with your contacts.

To view all contacts, Click on Contacts. At a glance, you will contact list wit email and phone where available and a select box for navigating through the pages at the bottom-right of the page.

Filtering Records

On the Contact Lists page, you can view contacts in a particular category, created by a particular user and of a particular type. In addition, you can view records you are following, highlighted and deleted.

Sorting Records

Records can be sorted alphabetically from A -> Z and Z -> A

Also, records can be sorted based on when the record was created.

Other things you can do include:

- **Follow**
When you follow a record, you get all updates about the record including edits, notes and actions via email.
- **Highlight**
Highlighting a record gives it an orange background which makes it visible in the pack and enable you to view only records you have highlighted.
- **Email**
You can easily send your contacts emails by clicking on the record and clicking the email tab or the small blue button besides the email on the main contact details page. You can also send email to multiple people by checking the boxes besides their names on the contact listing page (Click on Contacts) and Click Email
- **SMS**
To send SMS, you must have SMS credit which can be purchased from us. You can easily send your contacts SMS by clicking on the record from the Contact listing, then click the SMS tab or the small blue button besides the phone number on the main contact details page. You can also send SMS to multiple people by checking the boxes besides their names on the contact listing page (Click on Contacts) and clicking SMS
- **Delete**
To delete a record:
 1. Click on contacts
 2. Search for the contact you want to delete
 3. Check the box besides the record and click delete. It will ask for confirmation before deleting.
- **Restore**
Records deleted in error can be restored.

To view deleted record,
 1. Click on Contacts
 2. Select Deleted from the "Active" drop down box.
 3. After loading, choose the record you want to restore and click on restore. Note you can filter the list using the keyword and other filters on the page too.

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Email Campaigns

Email campaigns enable you reach your contacts via email. When sending an email campaign, only contacts with emails in database will receive it.

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Email Templates

Email templates add style to your emails. This module helps you create your campaigns.

On account creation, your account comes with a near blank template that comes with only your logo and a horizontal rule. You are advised to modified your template to fit your brand before sending emails. You are required to choose an email campaign while sending email campaigns.

To do this, you can either contract a designer to create your templates or create them yourself [here](#)

To create email campaigns, click on Email Templates under email campaigns.

Find below basic rules guiding email template creation, this can equally be found on the website:

Valid HTML is essential for your email delivery. Using bad markup increases the chances that your HTML will be marked as Spam.

Do not copy your codes from Microsoft Office or any other Office software as they embed unnecessary markup.

Your template must contain [mws:email_message]/[mws:email_message]. This must be put where actual email message should appear.

If you want to insert your logo, use [mws:account_logo]/[mws:account_logo]

If you want to insert record's first name, use [mws:first_name]/[mws:first_name]

If you want to insert record's last name, use [mws:last_name]/[mws:last_name]

If you want to insert record's company name, use [mws:company_name]/[mws:company_name]

If you want to insert record's email, use [mws:email]/[mws:email]

If you want to insert record's phone, use [mws:phone]/[mws:phone]

If you want to insert record's country, use [mws:address_country]/[mws:address_country]

If you want to insert record's state, use [mws:address_state]/[mws:address_state]

If you want to insert record's city, use [mws:address_city]/[mws:address_city]

If you want to insert record's street, use [mws:address_street]/[mws:address_street]

If you want to insert record's photo, use [mws:photo]/[mws:photo]

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Creating Email Campaigns

To create and schedule email campaigns, Click on Email Campaigns

You can do the following while setting email campaigns:

- Choose email recipients
 - ALL (All contacts will receive the campaign)
 - To specific contacts (you have to know their names or emails and they must have been saved as contacts on MyWorkSet)
 - Target a group (you can choose a choice combination to target)
 - Birthday (this enables you create a campaign that is sent only during birthdays). Please, do not create more than one active email birthday campaign.
- Choose Template (We believe you have at least one template). By default, when your account is created, it comes with a blank template which you can use in sending simple and concise messages across to contacts.

- Choose when to send email
 - You can send right away or
 - send at a later time
- You can add attachment to your email
- Type your email subject
- Type email body
- **To add inline images** (images that appear in the body of the mail, click the Image button on the text editor, Click on Browse Server, Upload the image and select upload image. You can set image properties which include but not limited to: width, height, alignment, etc.
- Make good use of tables in your email to organize your email to fit. To use tables, Click on the Table icon (second icon row, fourth icon from the right on the rich text editor) Set your table properties which include - width, height, rows, columns, alignment and other table properties. You may ignore the ones you do not understand or that are not necessary like Caption, Summary and Advanced Tab You can make changes to tables by adding rows/columns, splitting rows/columns, deleting rows and columns. To do this, select inserted table inside the editor, right click it and modify properties. Your email style really depends on your creativity, use of space, tables and images.
- Click on Send Email button. A popup will appear telling you to confirm email sending. As soon as you confirm it, email will be saved and queued for sending.

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Managing Email Campaigns

After creating an email campaign, you may choose to pause, edit or delete the campaign.

To manage email campaigns, click on Manage Campaigns under Email Campaigns.

There you can pause/resume running campaigns, edit a running campaign and delete campaigns you may not be needing anymore.

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SMS Campaigns

SMS is a quick and sure way of reaching your contacts.

It is advised to use SMS when you have short, quick info to deliver that are not really pictorial.

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Creating SMS Campaigns

SMS Campaigns enables you setup SMS messages for your contacts. It does not require "email templates".

To send SMS Campaigns, you must have SMS credit in your account. For details and pricing, [click here](#)

To create new SMS Campaigns

- Simply click on SMS Campaigns

- Choose SMS recipients
 - ALL (All contacts will receive the campaign)
 - To specific contacts (you have to know their names and they must have been saved as contacts on MyWorkSet)
 - Target a group (you can choose a choice combination to target)
 - Birthday (this enables you create a campaign that is sent only during birthdays). Please, do not create more than one active SMS birthday campaign.
- Choose when to send SMS
 - You can send right away or
 - send at a later time
- You can personalize your messages by using "Select to personalize your message" select box.
- Type your SenderName, this name will appear as SMS Sender
- Type message body. The length and number of page appear at the bottom right corner while you type message.
- Click on "Save and Send SMS" button to complete
- A confirmation popup will appear, asking you to confirm the message you are about sending
- After verifying, click confirm and message will be sent.

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Managing SMS Campaigns

After creating your campaign, you may choose to pause, edit or delete the campaign.

To manage SMS campaigns, click on Manage Campaigns under SMS Campaigns.

There you can pause/resume running campaigns, edit a running campaign and delete campaigns you may not be needing anymore.

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Tasks

MyWorkSet Tasks enables you schedule tasks for self and your team.

To access tasks, simply click on the Tasks menu item.

Performance

Tasks enables you see completion rate for your personal, branch and departmental tasks

Filter

You can view tasks created for branches, departments an self by selecting them from the Task scope drop them.

You can also view upcoming, completed, ongoing, pending and canceled tasks from the Task Status drop down

You can search using textbox on the right of the filter boxes

You can equally sort your tasks to see tasks that are most important to you.

Creating a new task

Creating a task on MyWorkSet is easy. Simply follow these steps:

- Choose who you are creating the task for - Personal (only you see it!), Department, Branch or entire team. To create departments and branches, [click here](#)
- Give the task a title

- Type the details of the task
- Choose the expected start date (this should be later than the current date)
- Choose the expected end date. Please note that time must be filled and must be in 24 hour format eg. 11:00:00 (This may be changed in future releases and Help updated).

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Teams and Roles

MyWorkSet is primarily designed for a team and not singular use. Hence, the root/main account can create roles and sub accounts for other users.

To create a new user, you must do the following:

1. Create a role (this defines what a user can/cannot access)
2. Create a department eg. Sales
3. Create a location/branch eg. Lagos
4. Then a new user can be created.
5. After creating a new user, an email is sent to the new user requiring the prospective user to confirm or delete account.

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Referral and Rewards

This module enables you view user referral chart, understand referral charts and plan your reward system.

This module is currently under active development.

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