The Bento 3 Contact & Customer Manager

The fast, free and easy way to get instant access to contact
and customer details – all in one place!

How to: Use the Bento 3 Contact & Customer Manager

1. **Download the Bento 3 Contact & Customer Manager** - Choose to open the download with "StuffIt Expander".

2. **Install the Bento 3 Contact & Customer Manager Template** - Open your Download folder, here you will find a new file named *"Bento Contact & Customer Manager.bentoTemplate"*, double click the *"Bento Contact & Customer Manager.bentoTemplate"* file to install the Bento 3 Contact & Customer Manager Template template.

3. **Now You See It** - You will now see the *"Bento Contact & Customer Manager"* templates on your screen and a newly created *"Bento Contact & Customer Manager"* library in your libraries list.

4. **Using the Bento Contacts & Customers Manager** - Now you can start adding information to the Contact & Customer Manager. Lets start by opening the *"Contacts and Customers Template"* by double clicking it, or choosing it from the Bento Contact & Customer Manager library.

5. **Add a Customer or Contact** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"overview"* form, then click the "+" symbol at the bottom of the form to add a new record. You can now begin to add contact information, clicking the "+" symbol at the bottom each time you want to create a new contact.

6. **Link iCal Events & Tasks to Your Contacts** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Calls, Meetings & To-Do Items"* form. Click the button in the lower left corner of the *"Activities Linked to this Contact from iCal Events"* list, this will display your iCal events, choose the events related to this contact and then click *"Add to List"*. Repeat as required for the *"Activities Linked to this Contact from iCal Tasks"* list.

7. **Add Notes from Meetings & Conversations** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Notes & History"* form. Remeber to choose *"Current Date & Time"* from the *"Insert"* menu to date and time stamp your entries.

8. **Add Emails** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Emails"* form. You can now drag and drop emails from Apple Mail into this form.

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9. **Link to Related Documents** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Documents & Files"* form. You can now drag and drop related documents into the files list (these files are not stored in Bento, the list links to the document location on your Mac).

10. **Add Sales Receipts** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Sales Receipts"* form. To create a new *"Sales Reciept"*, click the "+" symbol at the bottom of the *"Sales Receipt"* list or use the *"Sales Reciepts"* Library also included in the Bento 3 Contant & Customer Manager.

11. **Log Sales Opportunities** - Along the top of the template you will see a list of *"forms"* within the template, click on the *"Sales Opportunities"* form. To create a new *"Sales Opportunity"*, click the "+" symbol at the bottom of the *"Sales Opportunity"* list or use the *"Sales Opportunities"* Library also included in the Bento 3 Contant & Customer Manager.

12. **Use It On The Move** - You can use these templates with Bento for iPhone and iPod Touch, keeping your customer information in the palm of your hand.