

# HANDCASE

## HANDCRM USER MANUAL

This manual is intuitive as ours softwares, observe the images to understand as to best and the more efficient use. The screens follow the logical order of the presentation of tools in the interface of each software.

### Descriptivo

Suite of 12 tools. With it it is easy to organize and to manage the information on customers and prospects of its company or of third. For the biggest companies it serves as a mobile and brought up to date complement. Structuralized in Commercial Description, Research, Attendance, Claims, Information, Suggestions, Accompaniment, Profiles, Evaluation, Reports, Daily and It set appointments. In English.

### **1.0 - PALM OS 3.5 or superior (ram 129 KB)**

### Instalation

Installation If you received the program for email, are enough to unpack zip in the work area and to give a double click in the archive Set **handCRM.prc** the tool of installation of its Palm will go to open presenting the archive to be synchronized, synchronizes and ready or in the next synchronization it will be installed. If you he bought the compact disc is enough to use the installer or to have access for the Windows Explorer the directories, to give a double click in the archive Set **handCRM.prc**, the tool of installation of its Palm will go to open presenting the archive to be synchronized, synchronizes and ready or in the next synchronization it will be installed.



You will recognize it for the icon to the side.

### Initial Interface



Here you choose the tool that she desires to use.



Standard menu, to copy information of the other tools and vice versa.

Obs.: You will be able to copy the information of the Memos of its Palm all and to place in the HandCRM as well as copying of it and paste in the Memos to use from the Palm Desktop. In the tools the button beam. It facilitates the transference for another Palm that has the installed HandCRM of the information of customers.



Here as in the screens of the other tools you choose in the menu and have access the standard tools of the Palm after use come back direct toward the HandCRM.

**Access** Main

It personalizes the use and access to HandCRM

Authorized for  
.....  
.....

Used for  
.....  
.....

When click in the button **A** in the initial screen you personalize the use of the HandCRM with its name or another information that it judges useful.

**Add Customer** Main

Name | .....

Date .....  Male  Female

City .....

Phone ..... Age .....

E-mail .....

School Age .....

Address Profession .....

**DIR** (<<) (>>) (Beam) (New) (Erase)

Here you organize the data of its customers. Each customer will be available for all the tools of the HandCRM to personalize all the information in all the tools for each customer.

**Review** Main

Customer ▼

Date .....  UpDated

Product/Service .....

Type .....

Details .....

Old customer  New Customer

Prospect  .....

**DIR** (<<) (>>) (Beam) (New) (Erase)

Here you organize the description of each customer.

Research - General	Main	Research - Complement	Main
Customer	▼	Customer	▼
Date	Time	Date	Time
Type		Report of the Research	
Opinion			
<input type="checkbox"/>	<input type="checkbox"/>	Steps	
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/> UpDated	<input type="checkbox"/> Complement		
DIR <<>> Beam New Erase		DIR <<>> Beam New Erase	

Here you organize the information of research customer the customer.

Attendance	Main	Attendance	Main	Attendance	Main
Customer	▼	Customer	▼	Customer	▼
Date	Time	Date	Time	Date	Time
Type		Type		Type	
Place		Product		Pos-Sale	
Details		Service		Concession	
<input type="checkbox"/> Accepted	<input type="checkbox"/> In Progress	Sale		Contract	
DIR <<>> Beam New Erase		Rent		UpDate	
Attendance Main		Pos-Sale		Change	
Customer	▼	Concession		Devolution	
Date	Time	<input type="checkbox"/> In Progress		Other	
Type		DIR <<>> Beam New Erase		<input type="checkbox"/> In Progress	
Place		Attendance Main		DIR <<>> Beam New Erase	
Details		Customer	▼		
<input type="checkbox"/> Accepted	<input type="checkbox"/> In Progress	Date	Time		
DIR <<>> Beam New Erase		Type			
Attendance Main		Place			
Customer	▼	Details			
Date	Time	As To make			
Type		As It functions			
Place		As To remake			
Details		As To solve			
<input type="checkbox"/> Accepted	<input type="checkbox"/> In Progress	As To use			
DIR <<>> Beam New Erase		DIR <<>> Beam New Erase			
Attendance Main		Attendance Main			

In these screens you organize the attendance information customer the customer.

Claim	Main
Customer	▼
Date	Time
Type	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/> Updated	
DIR <<>> Beam New Erase	

Here you organize the claims customer the customer.

Commercial Information	Main	Comm. Info. - Complement	Main
Customer	▼	Customer	▼
Date	Time	Complementary Information	
Products/Services		<input type="checkbox"/>	
		<input type="checkbox"/>	
Proceeding		<input type="checkbox"/>	
		<input type="checkbox"/>	
Complement		Back the Previous Page	
DIR <<>> Beam New Erase		DIR <<>> Beam New Erase	

Here you organize the commercial information customer the customer.

**Suggestions** Main

Customer ▾

Date ..... Time .....

Type| .....

Suggestions  Accepted

.....

.....

.....

.....

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**DIR** << >> Beam New Erase

Here you organize the information gotten through suggestions customer the customer.

<b>Accompaniment</b> Main	<b>Accompaniment</b> Main	<b>Accompaniment</b> Main
Customer ▾	Customer ▾	Customer ▾
Date ..... Time .....	Date ..... Time .....	Date ..... Time .....
Type .....	Type .....	Type .....
Status ▾	Letter ▾	Advice ▾
.....	E-mail	Direction
.....	Fax	Answer
.....	Visit	Request
.....	.....	Other
Date of new Accompaniment	Date of new Accompaniment	Date of new Accompaniment
Time .....	Time .....	Time .....
<b>DIR</b> << >> Beam New Erase	<b>DIR</b> << >> Beam New Erase	<b>DIR</b> << >> Beam New Erase

Here you organize the description of accompaniment in the attendance customer the customer.

**Profile** Main

Customer ▾

Date .....  UpDated

Type .....

Consumption .....

.....

.....

.....

.....

.....

**DIR** << >> Beam New Erase

Here you organize the information of consumption profile customer the customer.

**Evaluation** Main

Customer ▾

Date ..... Time .....

Product/Service .....

.....

Evaluation .....

.....

.....

.....

**DIR** << >> Beam New Erase

Here you organize the information of evaluation of the service of attendance or the services that the customer gives to customer.

**Report** Main

Customer ▼

Date ..... Time .....

Title .....

Summary .....

.....

.....

.....

Recommendations .....

.....

**D** << >> Beam New Erase

Here you it makes its reports. E has access of any tool through button **R** in the base of the tools.

**Diary** Main

Subject | .....

Date .....

.....

.....

.....

.....

.....

.....

.....

<< >> Beam New Erase

Here you the day makes its personal notations day. E has access of any tool the Daily one through button **D** in the base of the tools.

**Agenda** Main

Customer ▼

Date ..... Time .....

Type| .....

Subject .....

Descriptive  Confirmed  Postponed

.....

.....

.....

**DIR** << >> Beam New Erase

Here you set appointments its professional commitments relating with its customers if to desire.

Any problem with Software enters in contact with HANDCASE [suporte@handycase.com](mailto:suporte@handycase.com)

**Acesse:** [www.handycase.com](http://www.handycase.com)

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