

HANDCASE

SALESMAN

USER MANUAL

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

Descriptive

Suite of 10 integrated tools for sale teams of products or services. Tools included: catalogue, consultations, requests, commissions, complete agenda, customers, sales, reports, expenses, reminders and memos.

1.7 - PALM OS 3.5 or superior (ram 135 KB)

Install

Just unpacking the zip on the desktop and give a double click the file **Salesman.prc** the tool installation of your Palm will open showing the file being synchronized, synchronize and ready.



You recognize by the icon on the side.

Initial Interface



Here you choose the tool you wish to use.



Menu default, simply copy and paste from other tools in the Salesman information and vice versa.

Note: You may copy of your Palm Memopad of all the information and place on the SalesMan and copy and paste it in Memopad to use from the Palm Desktop.

In the beam button tools facilitates the transfer to another Palm that has installed the Salesman of the information on each screen of each tool.

Help

First it has access all the tools to follow creates the categories that to need later add the contacts that will be valid for majority of the tools. In some cases you it will be able to associate Category and Contact. In others it will be enough to add an information in a tool and it will be valid for another one. Doubts? It has access Manual in pdf.

OK

Here Basic Help, access by ? icon top of the initial screen.

Category List Main

Categories

[Empty list area for categories]

Expenses

New Category

Here you add a variety of categories that may involve the tools and **Expenses** and **Consultations**.

Add / Edit Costumer

He adds Customers who will be valid for some Tools. In the tool I register in cadastre adds CNPJ, address, telephone, etc

Ex.: Joe Doe

Date 4/28/06

Contact

Company

Complete Cadastre

OK

Cadastre List

New Customer

Customers List

New Cadastre

Cadastre

Customer is a Partner

Customer

Phone

Fax

E-mail

Address

Duplicate

Erase

OK

Here you add customers that will be available in other tools.

Expenses List All Main

Date Value Expense Type

Expenses

Category

Date 4/28/06

\$

Expense Type

Expense - Descriptive

Expense

Date 4/28/06 Object of the Expense

Descriptive

Expense Descriptive

Add Category

New Expense

<<

>>

Erase

OK

Reimbursed

OK

You can organize the costs. It has also a second screen with the description of expenditure and repayment, among other additional features.

Catalogue List				Main	Catalogue
Prod.	Spec.	Disc.	Cond.	Product	.....
				Inclusion in the Catalogue	.....
				Specifications	.....
				Descriptive	.....
			
				Conditions	.....
			
<input type="button" value="New Product"/>				<input type="button" value="<<"/> <input type="button" value=">>"/>	<input type="button" value="Erase"/> <input type="button" value="OK"/>

Here you see the list of products. This will allow you to add products with descriptive and other information.

Products List	Add Product
	Adds Products that will be tied the sales that will be made.
	Ex.: Software Salesman 1.7
	Product

<input type="button" value="<<"/>	<input type="button" value="New Product"/>
<input type="button" value="<<"/> <input type="button" value=">>"/>	<input type="button" value="Erase"/> <input type="button" value="OK"/>

Here add product name for list.

Report	Descriptive	Complement
Customer ▾	Objective	.....
Title	Descriptive	.....
Summary	.....	.....
Date	.....	.....
Commissions	.....	.....
Date of Receiving	.....	.....
\$
Items	.....	.....
<input type="button" value="Descriptive"/> <input type="button" value="Complement"/> <input type="button" value="OK"/>	<input type="button" value="<<"/> <input type="button" value="List"/>	<input type="button" value="<<"/> <input type="button" value="List"/>
Report - Itens	Report List	Main
To make	Customer Title	Date
To consider	.....	.....
.....
.....
.....
.....
Obs.:	.....	.....
.....
<input checked="" type="checkbox"/> Make/Consider <input type="button" value="<<"/> <input type="button" value="List"/>	<input type="button" value="<<"/> <input type="button" value="List"/>	<input type="button" value="New Report"/>

Here you prepare and viewing reports. In this tool we add the committees with date of receipt and two new screens (descriptive and complement).

Consultation	Consultation List	Main
Title	Title	Commission
To associate the Request		
▼		
Consultation		
.....		
.....		
To associate the Commission		
▼		
<input type="button" value="<<"/> <input type="button" value=">>"/> <input type="button" value="Erase"/> <input type="button" value="Clean"/> <input type="button" value="OK"/>	<input type="button" value="New Consultation"/>	

Here you do and see Consultations. With it you can organize information from applications, or sales and associate with requests made by you or by the customer, and even join the commission on sales.

delivery, cancellation and Post-sale). On the screen conditions you describe in detail the conditions of sale. On the screen Daily Sales you can describe and organize your day of sales.

The screenshots illustrate the 'Agenda' application's interface. The top row shows three instances of the 'Agenda' screen, each with a 'Commitment' dropdown menu open, displaying various options like 'To Deliver', 'To Send', 'To Make', 'To Go', 'To Participate', 'To Research', 'To Prepare', and 'To Answer'. The middle row shows three more 'Agenda' screens with different commitment lists, such as 'Academy', 'Lunch', 'Presentation', 'Lesson', 'Commemoration', 'Purchases', and 'Consults Doctor'. The bottom row features an 'Agenda - Alarm' screen with instructions: 'It marks Day and Hour To be informed' and 'An Event To the informed being registers. Registers the Next one', along with a date and time '4/28/06 3:10 pm' and a 'Clean' button. Next to it is the 'Agenda's List' screen, which has a table header 'Customer Date Time' and a 'New Commitment' button.

In this tool you can involve the kind of commitment to the customer.

The 'Reminder' application interface consists of a form with the following fields: 'Title', 'Subject', 'Reminder in', and 'Descriptive'. At the bottom of the screen, there are five buttons: '<<', '>>', 'Erase', 'OK', and 'New Reminder'.

This will allow you to organize activities and actions to be remembered and will be notified by visual and audible warning (the program will connect the Palm with the screen showing continuous beep sound).

Any problem with the Software please contact HANDCASE soporte@handycase.com

Access: www.handycase.com

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