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Sales Professional's Helper

Product Description:

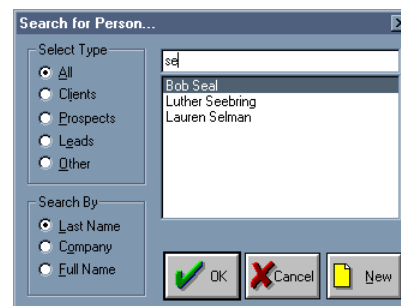
Sales Professional's Helper is the best CRM (customer relationship management) value on the market. It's a schedule book, address book, and multifaceted sales tool rolled into one easy interface. Every client, long-term prospect, new lead, and business contact is two keystrokes away – ready for email and speed-dial calling campaigns, document merges with MS Office, and targeted marketing. Sales Professional's Helper will remind you to follow up with clients the next day or next week, and automate much of the data-mining involved with the sales job. You can also sync it with your PDA and carry your database in your pocket. Get an edge on your competitors, who are already stuck on ACT, Goldmine, or Broker's Ally.

Who is it for?:

In most cases, assistants and junior brokers use Sales Professional's Helper in a workgroup setting. While the head broker uses Broker's Helper or Investment Advisor's Helper to manage portfolios, the other people on the network access the contact records to drive sales, build client rapport, and develop new prospects.

Sales Features:

- Speed-dial
- Datebook and address book hotsync with **Palm OS** devices
- Ability to merge contact information with **MS Office** files
- Customizable fields for each contact's personal and financial information
- Target-marketing tools, such as screening and cross-referencing of data
- Ability to email clients directly from contact screen, eliminating the need to toggle between programs
- Sales lists for organizing clients by assets, location, holdings, or any other search criteria
- History log -from a single screen, records of every contact ever had with a client.
- Icon-based marking of contact records, to show phone calls, faxes, appointments, meetings, mailing, travel and more
- Two-letter search for ultra-fast retrieval of records
- To-do lists, automated reminders, and commitment scheduling; for the single sales-gunner or for partners and assistants working across a network
- Customizable schedule for workgroup management



Price:

\$150 as a standalone without phone and online technical support; \$250 with.

Additional network stations: \$75 first year, \$50 each following year.

Annual fee includes software upgrades and full phone/online technical support.

System Requirements:

Minimum: Pentium 133 MHz or higher; 64 MB RAM; 500 MB hard drive (storage) space; ability to read CD-ROMs; Win 95/98/2000/NT