



TELEMAGIC FEATURES DETAILS

We would like to thank you for your interest in TeleMagic, a full featured contact management and e-Commerce based CRM (Customer Relations Management) database. We have outlined some features of TeleMagic and how we can customize them to meet your needs. The following information includes examples, logical steps and technical detail while keeping it simple. For more information on any subject please feel free to contact us direct at **1-888-835-3624**, on the Web at <http://www.telemagic.net>, or by email info@telemagic.net

CUSTOMIZATION FEATURES

Many contact managers claim to be customizable. Often this means allowing users to change the prompt on some predefined fields, or perhaps add an additional page or tab that must follow a fixed structure. Most contact management software requires that company, contact, and address fields be present in the database, limiting the use of the software to information related to people.

TeleMagic's customization is so robust, you can virtually use it as an application generator.

Custom Use - If you were to design an application for your business, what would it do? Would it organize sales leads, prospects, and close sales? Would it contain information on customers and allow you to project income based on purchasing trends? Would it keep your inventory and let you see at a glance when you are running low on something?

Most contact managers are good at storing peoples' names, addresses, and phone numbers. TeleMagic is good at storing anything. It is able to do this by using Key Fields. Key Fields allow users to specify what fields hold contact information, but do not require their presence in the database. This means that a TeleMagic database is not limited to containing contact data. TeleMagic can be used for any information that needs to be stored and organized. You can use the databases to track inventory, generate invoices, manage projects, and automate employee time cards, knowledge base and much more.

Custom Look - An additional aspect of customization that is often overlooked, but nonetheless important, is the aesthetic control. Designing your work area in TeleMagic means more than just controlling how data is displayed, it also means creating a view of your data that thinks the way you do. Fields can be grouped and arranged so like data is together. The flow of data entry can be controlled to match the way you work. Drawing tools and color properties let you customize the "look" of your page. You can even set a wallpaper for the page.

Custom Views - If different people in your organization have different data requirements, or even different tastes, they can each create their own view of the database. Differences in views can be as simple as different color settings, up to an entirely different set of fields. Views can also be used to organize your contacts. For example, you may have a view for lead qualification. Once a lead is qualified, you may have a view for sales prospects. Finally, once a sale is made, you may have a view for existing customers. This same record can be viewed in three different ways as the contact's relationship with your company evolves.



PRE-DEFINED OR CUSTOM DATABASES

When TeleMagic is installed, you may select to install any of a broad range of predefined databases. These databases may be used as-is, or used as a framework for a custom database. There's even an option to add a blank database. A blank database creates a blank slate where the user can put anything he or she wants.

TeleMagic's custom Screen Designer lets you start from the drawing-board and design your database however you like. Editing a database is simply a matter of selecting **Contact, Contact Utilities, and Screen Designer** from the TeleMagic menu. This is the screen customization workshop for TeleMagic. The double row of buttons on the bottom of the screen contains the object tools. Press F1 at this screen for a description of each tool.

Right-click on an object to access the object's properties. Properties let you control settings such as an object's line and fill colors, font, and transparency setting. Right-clicking on the page itself let's you set background colors, default pen color, default font, grid settings, and more. (If your entire page is covered by objects, select **Properties** from the **Page** menu to view Page properties.) New views are created by selecting the **Add** button on the control bar at the bottom of the screen, then choosing the **Add View** button. Add a name for the view and a name for the first page in the view at the properties window and click **OK**. You will be at a blank page where you can explore designing your own screen. Refer to TeleMagic's help for information on using the Screen Designer.

Even More Customization! - Preferences Determine how TeleMagic Behaves

In addition to customizing the layout of databases, Preferences can be used to customize and control how TeleMagic behaves. By simply selecting **Preferences** from the **Options** menu, users have full control over their user-specific preferences, managers have additional control over database-specific preferences, and supervisors have total control over installation-wide preferences.

User-specific Preferences

There are a wide variety of user preferences that allow the user to control his or her own workspace.

- Each user can decide which screens they view when they first open a database.
- Activity preferences can be set up specific to each user's workload.
- Create multiple sets of custom toolbars, function keys, and list boxes and use Directories preferences to choose which to use.
- Configure dialer, wireless messaging and local fax settings for each user's workstation.
- Display preferences let the user set preferred time format and data entry aides.
- Use the built in e-mail or an external e-mail program: each user has the freedom to choose.

Database Preferences

- Choose database level names, database controlling levels, and custom standard addresses.



- Configure field calculations, record locking, and currency display.
- Most contact managers have required address fields that must be in the database. Key Fields let the user select the fields that contain this key information, giving them the option to use these fields, or not.

Installation Preferences

- Setup system preferences such as the System ID and date preferences.
- Create custom toolbars and function key macros that provide short cuts for repetitive tasks.
- Control when users may be in TeleMagic using a downtime setting or an immediate forced logout option.
- Add or remove users from TeleMagic.

SECURITY

TeleMagic allows full customization of security. Supervisor users have their own group with full rights to all features and databases. In addition, Supervisors can easily configure separate security groups for other users based upon what security is needed for each user. Security can be set at the system level, database level, and even at the field level within each database.

System Level Security

Security groups let you provide security by department or job function and allow you to make changes just once instead of changing each user individually.

- Supervisor users can effectively create a system which is both secure and accommodating: non-supervisor users are not hindered from doing their work by having too little rights, while at the same time supervisor users can be confident that only qualified people are accessing sensitive areas.
- Access to system functions and databases can be controlled for each security group.
- Users can intuitively create and maintain multiple security groups.
- Users can easily be transferred from one security group to another as needed.

Database Security

You can create unique security for each database - allow limited access to one database and full access to another. By simply clicking the **Database Security** button, security for each database can be customized for each security group.

- Database security can be set at the database level, record level, and at the individual field level.
- Give as much or as little rights based on the level of access each user group needs to get their work done. TeleMagic gives you total control!
- Access to Sales Forecasts, Reports, Filters, Indexes, Database Preferences, Export/Import of records, the Screen Designer, and more can all be fully customized and controlled within Database Security.