

# TELEMAGIC®

Business Success In Motion™

## TeleMagic Enterprise White Paper

### Introduction

Customer Relationship Management is a tool used by successful organizations to manage the life cycle of their most valuable asset – their customer base. This resource, long available for use by larger corporations, is now available for small to mid-sized businesses. TeleMagic Enterprise is a fully customizable management solution specifically designed for the way that works best for any company. Since no two businesses are alike, this customizability helps organizations focus on their business model. TeleMagic's focus is on customer relationship management, managing all of the information received from customers that will help provide the best possible products and services in the most efficient and effective manner. It is this power of information that builds strong customer relationships. And it is strong customer relationships that help to keep the wheels of *Business Success In Motion*.

### TeleMagic Enterprise Defined

TeleMagic, first released in 1985, was one of the early innovators of contact management software. As a fully customizable, three level relational database, TeleMagic has expanded beyond simple contact management into the customer relationship management arena. TeleMagic is designed to provide access and easy manipulation of the information that powers a business, with integrated features such as zoom dialing, faxing, word processing, Internet e-mail and more. TeleMagic was designed for the large network installation, but small to mid-sized businesses also benefit from TeleMagic's robust feature set and data management. The complete customization features allow you to start with a blank page, and build your database to fit your business needs, or choose from several preloaded template designs. Databases have been designed for many uses not traditionally associated with contact management including inventory tracking, invoice generation, help desks, employee time cards, and sales force automation. This level of flexibility means the software changes to work the way you do, instead of requiring that you change the way you run your business to fit the software.

### Features of TeleMagic Enterprise

- Designed for networks or stand-alone PC's (includes record locking)
- Three-level relational contact database
- Full featured Activity Manager
- Built-in fax capability
- Wireless Messaging access integrated with activities and the Contact Manager
- E-mail link to Microsoft Outlook
- Auto-dialer
- Branch Scripting with activity history generation and input fields linked to your contact records

- Sales Forecasting, including links to contact records and extensive reporting with graphs
- Spell Checker
- Custom and quick reports
- Automation Server for dedicated print, fax, e-mail, and wireless message processing
- Import and export using popular file formats
- Mail merge integration with popular word processors (Microsoft Word 97 and 2000, Corel WordPerfect 8 and 9, Lotus Word Pro 97 and 2000, and Wordpad.\*Wordpad not supported in Windows 98 environment)
- System and field-level security and password protection
- Context-sensitive help including links to World Wide Web and FTP sites
- Record and system synchronization through Data Synchronization Server with automatic packet transfer
- Configurable toolbars
- User-definable macros
- Database Utility Program for system maintenance
- Host for client-server system, TeleMagic NetClient
- Integration with TeleMagic Auto Responder

## **Customization**

TeleMagic Enterprise's customization features are so robust; you can virtually use it as an application generator. Many contact managers are good at storing names, addresses, and phone numbers. TeleMagic stores any data. 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, but can also be used for any information that needs to be stored and organized.

An additional aspect of customization is the aesthetic control. TeleMagic can be designed to create a view of the data that provides the flow of data entry controlled to match the way an organization works. Multiple custom views for each database can be created for individuals or individual departments within a company.

## **Preferences**

TeleMagic provides 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.

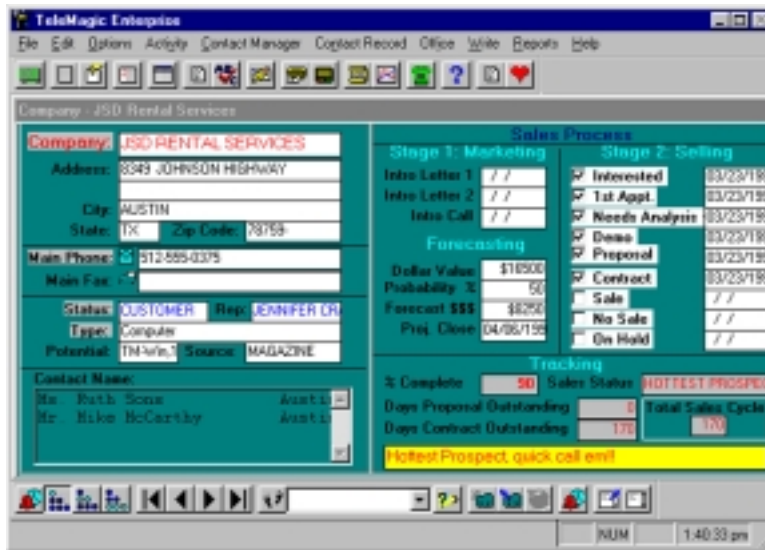
## **Security**

TeleMagic allows full customization of security. Supervisory users have their own security group with full rights to all features and databases. Separate security groups can be configured for other users based upon security needed for that user. Security can be set at the system level, database level and even at the field level within each database. Security groups allow the provision of security by department or job function.

## **Contact Manager**

The Contact Manager is the main window into TeleMagic. The appearance of the program can vary dramatically, depending on the particular database that is open. The Contact Manager screen is fully customizable. Everything from the type of information

shown and how it is displayed, to the aesthetic presentation of the page can be designed by the user.



## Contact Manager Features

- User-defined List Boxes allow rapid and consistent data entry
- Data entry templates, default values, calculated fields and validity checking for any field
- Free-form notepads can contain essentially unlimited data
- User definable sort orders and filters
- Powerful record search capability
- Editable Browse window
- Duplicate record checking

## Activity Manager

TeleMagic's calendar facilitates time management, productivity tracking, and contact history tracking. All of the functionality common to calendar programs, plus an uncommon level of integration with the rest of the program is provided in the Activity Manager. The calendar screens have been designed to provide quick access to information with on-screen icons, color-coding and prioritization, which provide immediate insight into the daily schedule.

The Activity Manager provides five different views. As many as four views can be displayed at once. The five different views available are:

- The Day View shows activities for the selected day. Schedules can be displayed in increments from 5 to 60 minutes.
- The Week View shows the schedule for 7 days, displayed side-by-side for quick comparison.
- The Month View shows a monthly calendar page. The number of activities scheduled is indicated and colored bars show extended activities.
- The To-Do View lists all To-Dos.
- The Detail View displays the details of a selected activity or To-Do.

## Activity Manager Additional Features:

- Custom Activity Icons
- Reserved resources identification display
- *Change Activity User* option
- A *Go To Contact* button

- Activity *Refresh* option

## **Sales Forecasting**

Direct sales environments have a constant need for accurate, up-to-date sales data. Past sales need to be recorded and future sales should be forecast in order for a company to stay healthy. TeleMagic's Sales Forecasting feature allows you to keep track of projected and actual sales, and relate those sales to contact records in any TeleMagic database. TeleMagic's Sales Forecasting feature provides an integrated, standardized way to record, view and report ongoing sales data.

## **Branch Scripting**

TeleMagic allows users to create and modify branch scripts that directly interface with the databases. The history of each script can be analyzed to determine the effectiveness of the branch script. Contact data is automatically merged into the script upon the selection of a branch script.

## **Dialer**

The TeleMagic Dialer allows contact records to be truly integrated with the phone. The Dialer can be configured to ignore local area codes and automatically dial prefixes and suffixes. North American Numbering Plan (NANP) setup also allows users to enter comprehensive rules for dialing that accommodates any special conditions in the local area.

## **Wireless Messaging**

TeleMagic allows you to send Wireless Messages directly from TeleMagic. Wireless Messaging allows you to:

- Send a message to a user, a group of users, or all users
- Send a message to multiple contacts using the filter of choice
- Send a message to anyone-not restricted to TeleMagic users and contacts
- Paste the information from the current contact record to the message being sent
- Send messages based on activities or e-mail
- Monitor the current transmission in real-time as the message is being sent
- Receive e-mail messages regarding the completion status of the message
- Send messages immediately using a workstation's modem, or send them to a queue for the Automation Server to deliver
- Quickly change sending options to adjust to different contacts' pager settings
- Prepare messages in advance, and send them at a later date

## **Faxing**

TeleMagic's Fax module was designed for people and companies that do a high volume of faxing. Documents can be created in any supported word processor, including Microsoft Word 97 and 2000, Corel WordPerfect 8 and 9, Lotus Word Pro 97 and 2000, and Wordpad (not supported in Windows 98), and can be directly faxed as easily as they can be printed. TeleMagic allows merge fields from contact records to merge into every page of a fax, not just the cover sheet. High volume faxing can be offloaded to a dedicated fax server. TeleMagic provides seamless support for merging and sending faxes from a dedicated workstation using the Automation Server.

## **TeleMagic Automation Server**

TeleMagic understands that users can't afford to stop working every time a processor-intensive activity has to be performed. The Automation Server was designed for high volume faxing, paging, printing and e-mailing. Processing faxes, documents, e-mail and Wireless Messages is a simple matter of selecting a server and queue. TeleMagic does the rest. Queues can be monitored from any workstation in a network. Users can quickly see if a particular page has gone through or a fax has been sent.

## **TeleMagic Internet Mail**

TeleMagic Internet Mail allows all of the features expected in a business e-mail package with the added benefit of the full integration with the TeleMagic databases. E-mail messages can be linked to contacts, activities created when e-mails are sent, and the e-mail program accessed from e-mail fields on the contact pages. TeleMagic Internet Mail works with existing MAPI e-mail programs, so existing address books can be utilized. Word Processor documents can be attached for both individual and broadcast e-mails, with the ability to perform document merging before sending such attachments. Merge fields can be inserted in the body of messages and e-mail can be sent to individuals or as broadcast e-mail. TeleMagic Internet Mail can be used as the primary e-mail application if preferred. Additionally, pre-defined templates can be created and used to send e-mail messages to individuals or as broadcast e-mail. TeleMagic does not need to be running to use TeleMagic Internet Mail.

## **TeleMagic Auto Responder**

TeleMagic Auto Responder automatically checks the database for records meeting a specified filter's criteria. When a record or records meet the criteria, a response is generated. The response can be a fax and/or an e-mail that gets queued to the Automation Server. The response can include merge information and document attachments. E-mail responses can be sent either to the contact's e-mail address, or to a specific e-mail address or group of addresses, such as the customer support representatives. Auto Responder can create an activity and/or stamp the contact's notepad when it creates a response. Profiles are created to determine how Auto Responder works with any database. Profiles can be created for any or all databases, and databases can have multiple profiles.

## **The Bulletin Board**

TeleMagic provides the Bulletin Board to serve as a forum for all TeleMagic users to exchange information on any subject. Users are never interrupted when a message is posted to the Bulletin Board, making it a convenient medium for general announcements. Notes on the Bulletin Board are public and not associated with any particular database or record.

## **Tack-Its**

Tack-Its look like the notes on the Bulletin Board; however, they appear directly on the Contact Manager screen. Tack-Its can either be personal or public, and they can be linked. Personal Tack-Its can only be seen by the author, while linked Tack-Its are linked to a specific database or specific contact.

## **The Message Taker**

TeleMagic's Message Taker is modeled on the phone message pads that have been used in offices for numerous years. The Message Taker fills in the date and time fields

automatically, and can accommodate messages of nearly any length. Message Taker will deliver the message, notify the recipient, and notify the sender that a message has been received.

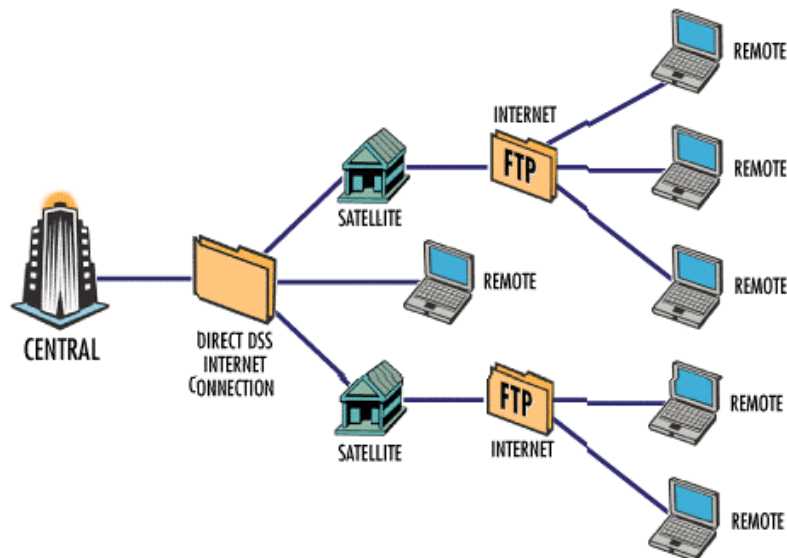
## Reports

There are three types of reports in TeleMagic: Standard Reports, Custom Reports and Quick Lists.

- *Standard Reports* are designed to anticipate reporting needs and make printing professional reports easy. Standard reports include security reports, database structure reports, address and phone lists, activity reports and many others. Through Standard Reports, TeleMagic can print envelopes, shipping labels, name tags, rotary cards and other items in many popular formats.
- *Custom Reports* allow the information to be presented in a format that makes sense to a company. Reports can be designed detailing practically any information in TeleMagic. Companies control what information is included, what calculations are made based on that information and how the information is presented.
- *Quick Lists* are custom reports with limited formatting options. For a quick summary of data in one or more fields, a Quick List is the easiest solution.

## Data Synchronization

TeleMagic is designed to provide access and easy manipulation of the information that powers a business. Because not all members of a business or workgroup necessarily work at the same location, a method of keeping this information current at all locations must be implemented. Data Synchronization Server works in conjunction with TeleMagic Enterprise to provide this capability, with power and flexibility unmatched by any other contact management application. TeleMagic *defines* data synchronization. As changes are made in TeleMagic, transactions are created for any changes made in databases included in synchronization. When the process mode is entered, the transaction records are condensed into packets and placed in a directory where users can retrieve these packets and place them in the inbox directories at the remote site. Users can also use FTP or e-mail to transfer them automatically via the Internet.



### Data Synchronization Features

- Share data between a central TeleMagic installation and additional remote installations

- Unparalleled power combined with one-click synchronization provides both flexibility and ease-of-use
- Create unlimited remote and satellite sites – each with unique settings
- Easily change the record set any site receives
- Only synchronize the data each site needs to see for maximum data security
- Control which fields in which records are included in synchronization for any site
- Synchronize Activities and activity permissions, Contact records, Database structure changes, E-mail, Filters, Indexes, List Boxes, OLE fields, Preferences, Program updates, Screen design changes, Security, and Users
- Powerful administrative assistance through data synchronization
- Automatic program updates to all sites
- Changes to databases are automatically transferred and updated at all sites
- Maintain personnel for sites anywhere in the world from one central location
- Control security at the remote sites, even assign users to a group remotely
- Create user preferences in the central location and copy them to users at remote sites
- Update each field using pre-defined rules and further qualify the selected field rule by creating a user-defined expression that provides the user total control
- Save data that is being replaced in any memo field
- Create scripts to automate processing at the remote sites – synchronization at remote sites is as simple as clicking an icon
- Create servers at the central site to control what occurs when you select to process
- Have multiple servers processing simultaneously for high volume synchronization
- Set up continuous synchronization at the server – changes can be exchanged between sites within minutes
- Choose to automatically transfer packets using TeleMagic's E-mail or FTP transfer

## Conclusion

As an early innovator of contact management software, TeleMagic has continued to exceed the expectations of its client base with its full featured, fully customizable software solutions. TeleMagic Enterprise gives clients and remote users the ability to access and manipulate their data with the TeleMagic Data Synchronization Server. TeleMagic's comprehensive design focuses on customer relationship management, giving a company the ability to use the power of information to its greatest potential. TeleMagic Enterprise provides companies with a solution that will put *Business Success in Motion*.

For additional information on TeleMagic and its family of products, please visit our web site at <http://www.telemagic.net>.

### Other TeleMagic White Papers Include:

Data Synchronization – information on the premier data synchronization technology  
 TeleMagic NetClient – information on the latest in web-enabled customer relationship management software

