



# TELEMAGIC ENTERPRISE

## What is TeleMagic Enterprise?

TeleMagic was first released in 1985 as an early innovator of contact management and sales force automation software. TeleMagic Enterprise, with its open architecture, is a fully customizable customer relationship management solution specifically designed for the way that works best for any company. Since no two businesses are alike, this customization 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.

### GLOBAL POWER FEATURES

- 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 e-mail, activities and the Contact Manager
- Built-in e-mail
- 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 Microsoft Word® 97 and 2000, WordPerfect® 8 and 9, WordPad® (not supported in Windows 98 environment) and LotusWordPro® 97 and 2000
- System and field-level security and password protection
- Context-sensitive help
- Record and system synchronization through Data Synchronization Server with automatic packet transfer
- Configurable toolbars
- User-definable macros
- TeleMagic contact import formats that include linked activities
- Database Utility Program for system maintenance
- Export to FoxPro, dBase III+, SDE, Delimited formats and user-definable formats

### FULLY CUSTOMIZABLE

- Add your own fields and decide the number, type, length, placement and configuration
- Field types include character, date, number, OLE, calculated, unique number counter, phone, fax, wireless messaging, FTP, e-mail, web, newsgroup, check box and notepad
- Easy-to-use Screen Designer to customize how information is displayed
- Multiple views for each level -customize how each user views information

### CONTACT MANAGER

- User-defined List Boxes allow rapid and consistent data entry
- Data entry templates, default values, calculated fields and validity checking for any field
- Powerful record search capability
- Editable Browse window
- Browse list of pending activities
- Duplicate record checking

### ACTIVITY MANAGER

- Scrollable daily, weekly and monthly views
- Reschedule and re-prioritize using "drag and drop"
- Single-click check-off of completed tasks
- Associate Contacts with Activities and To-Do's
- Assign and view status of tasks assigned to others
- View and modify other users' schedules (with permission)
- To-Do display includes indication of time until or past deadline, and completed items
- Multi-day activity scheduling
- Recurring activity scheduling
- Scheduling conflict warnings
- Automatically search for available time slots

- Calendar security
- Alarms with or without TeleMagic loaded
- Activity Browse
- Activity Archive
- User-defined weekends and holidays
- Group activity scheduling
- Assign resources to activities
- Reassign activities from one user to another user
- Move groups of activities to a new time slot
- Automatically create an activity for all contacts in a filter and assign them to one or more selected users
- Configurable Activity Views

### REPORT GENERATION

- Standard reports on various areas of TeleMagic, such as faxing and sales forecasting
- Activity reports including printout to popular "day planner" format
- Envelope, label, and "rotary index" printing
- Contact and Phone Lists
- Quick reports for novice users
- Configurable Reports Menu
- Custom report writer including Report titles and summaries, Multiple fonts, pitches and styles, Page orientation and size selection, Calculated fields with input prompts, Full color illustration and OLE support, headers and footers by page and group, and Print Preview

### E-MAIL

- E-mail application can run independently from TeleMagic
- Works with your existing MAPI e-mail server or as a stand-alone
- Merge fields can be incorporated directly in e-mail messages
- Link e-mail messages to contacts in your TeleMagic database
- Create rollover lists of messages linked to contacts



- Automatically link incoming messages to contacts
- Include attachments, such as files and merge documents, with your messages
- Establish multiple e-mail accounts for each user
- Record e-mail activities in the Activity Manager automatically
- Send locally or process through Automation Server
- Send e-mails to all contacts within a filter (broadcast e-mails)
- User-defined folders
- Extensive search
- Address book with Print Option

#### **WORD PROCESSING**

- Create pre-defined templates and send email messages to individuals or as broadcast e-mail
- Supports Microsoft Word® 97 and 2000; Word Pro® 97; WordPerfect® 8.0 and 9.0; Lotus Word Pro 97 and 2000, and WordPad®
- Base new documents on previously created templates
- Share documents between users, or keep personal documents private
- Link documents to contacts and create rollup lists of linked documents on contacts' records
- View lists of documents printed or faxed to a contact

#### **FAXING CAPABILITIES**

- Fully integrated faxing system
- Send immediate faxes to individual contacts or to all contacts in a filter (broadcast or batch fax)
- Include merge fields in all pages being faxed
- Extensive fax preferences to customize faxing
- Fax locally or from a dedicated server
- Multiple servers and queues
- Support for unlimited servers processing faxes, with up to eight fax modems per server
- Links with the Activity Manager and contact records for fax history tracking
- Fax TeleMagic reports
- Fax maintenance for faxes sent locally
- Fax external documents generated in other applications (using print capture function)
- Fax documents using any of the supported word processors and automatically selects the correct word processor for each document

#### **WIRELESS MESSAGING**

- Send Wireless Messages to contacts or TeleMagic users, to all contacts in a filter, or to everyone in a user group
- Send messages from the local workstation or from a dedicated server
- Send Wireless Messages based on activities
- Maintenance screen for messages sent locally

#### **DATA SYNCHRONIZATION SERVER (DSS)**

- 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 DSS
- Automatic program updates and upgrades 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

#### **STRATEGIC PARTNERS (Third Party Products)**

- Links to numerous accounting applications
- CTI integration and call center management
- Receivable and inventory tracking
- Bid and Proposal
- Order entry system
- Candidate search and proposal generation for placement agencies
- Newspaper and magazine template to assist sales and production of ads
- Planning guide for database design
- Campaign Management
- Real estate prospecting and contract management system
- Sales Tracker
- Strategic Partners represented on the website

#### **SYSTEM REQUIREMENTS**

Minimum hardware requirements: IBM-compatible computer, Pentium 233, with a minimum of 64MB of RAM. Pentium II 300 with 64 MB RAM recommended. Microsoft Windows 95 or newer, or Windows NT version 4.0 (recommended). Service Pack 3 must be installed on Windows NT Server or Workstation. 200 MB or more free space on a hard disk for initially installing TeleMagic. (300 MB or more free hard disk space recommended)

#### **OPTIONAL SUPPORT**

Class 1 or 2 FaxModem or other serial-attached phone dialer. Printer access through Windows printer setup. Wireless Messaging requires access to a carrier terminal that supports modem transmission.

#### **SOFTWARE**

Microsoft Windows 95, 98, NT4, and 2000.

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