

TELEMAGIC®

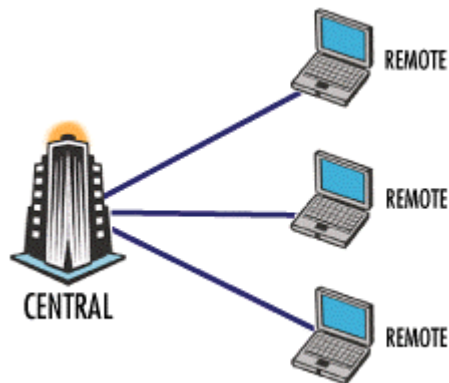
Business Success In Motion™

Data Synchronization White Paper

Introduction

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 current information at all locations is crucial for success. The Data Synchronization Server works in conjunction with TeleMagic Enterprise to provide this capability, with power and flexibility unmatched by any other customer relationship management software application. TeleMagic defines and sets the standard of data synchronization.

Satellite offices sharing a database with a central location with remote users out in the field need to be able to access their activities, e-mail and contact records. The Data Synchronization Server can be used with installations wherever users need to be able to access and edit data away from the central office. Using the Data Synchronization Server, all changes to records made in remote sites can be updated in the central location, and vice versa, as often as necessary to ensure that all users are working with the most up to date data. A company headquartered in Chicago with branch offices in Springfield, Indianapolis and Salt Lake City would have the capability to exchange the most current information in a timely manner.



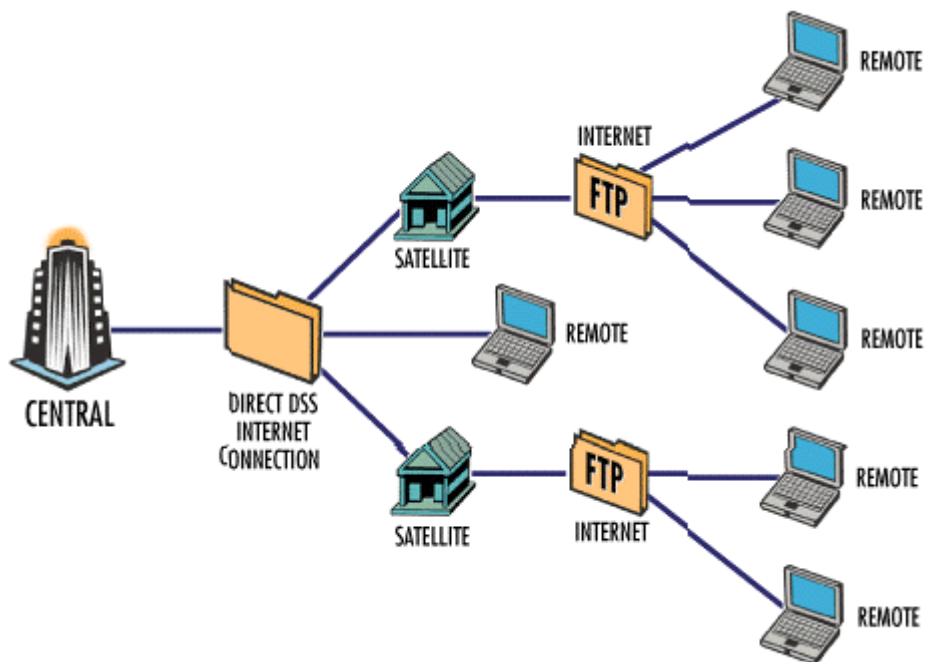
How Data Synchronization Works

As changes are made in TeleMagic, transactions are created for any changes made in data included in synchronization. Entering into process mode in the Data Synchronization Server, these transaction records are condensed into packets and placed in a directory created by the Data Synchronization Server program. Users can then retrieve these packets and place them in the inbox directories at the remote site, or use FTP or e-mail to

transfer them automatically over the Internet. At the same time, each satellite and remote site is creating transaction records, which will then be transferred to update the central location. In this way, the synchronization process provides all users with the most current information. This allows all users to have up-to-the-minute accurate information, whether they are in the office or out in the field. With data synchronization:

- Only changed data is included in packets for maximum efficiency.
- Each field change is analyzed separately using extensive, customizable validation criteria.
- Data in memo fields are merged and sorted by date and time, starting with the most recent. The site time zone and date format is taken into account, converting the date stamp of a memo field entry to the date format in use at the site.
- Total control over what data is sent to each site, down to the field level. Control is maintained at the central installation for security.

The Data Synchronization Server provides field level synchronization. Changes made to individual fields are tracked separately in the transaction file. This results in greater data integrity, since only fields that have been changed are synchronized. Field level synchronization has the ability to establish “field rules.” Field rules literally control how each individual field will behave when a change comes in from a remote site. A company is given the power to determine what information will be changed and how it will be shared with remote users.



The central location has total control over the remote sites. This control includes:

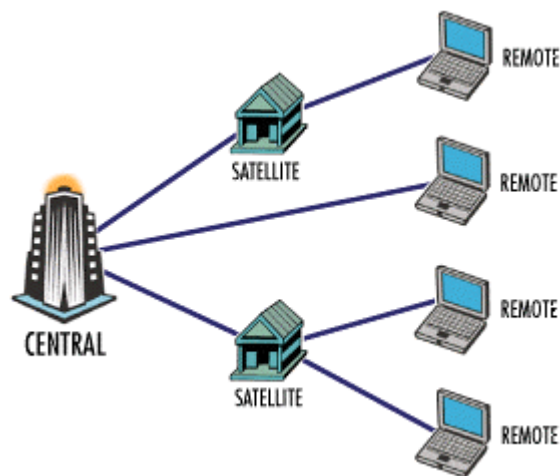
- The ability to add and delete users at remote locations during synchronization.
- The ability to control security at the remote sites.
- The ability to assign users to a group remotely.
- The ability to create user preferences in the central location and copy them to every user in a remote site.

- The ability to select which levels of which data are synchronized to each site.
- The ability to control which fields in which records are included in synchronization for any site.
- The option of synchronizing only fields that have been changed, or synchronizing all records in a filter.

Data to be synchronized is compressed into packets for ease of transfer and automatically decompressed upon receipt. Individual packets are created for each site and clearly labeled. Installations only receive the data applicable to that site and the central location retains control over what information each site receives. In this way, only the information necessary to a particular site is exchanged, saving both time and the duplication of effort.

Satellite Sites

In a standard synchronization model, there is one central site. Additional installations of TeleMagic share information with each other through that site. The central site maintains complete control over the information that is sent to each remote and over the information that each remote sends back to the central site. Satellite sites are similar to remote sites in the way that they communicate with the central site, its remote sites and other satellites. The central site continues to maintain control over the information that it sends to the satellite and the information that the satellite site sends back to it. The central site views and treats the satellite just like any remote site. Satellite sites can have their own remote sites. These remote sites do not communicate with the central site. They view the satellite as their central installation. The satellite becomes the server for the remote sites. The satellite site retains control over the information that is synchronized between itself and its remote sites. This information may or may not be included in synchronization with the central site.

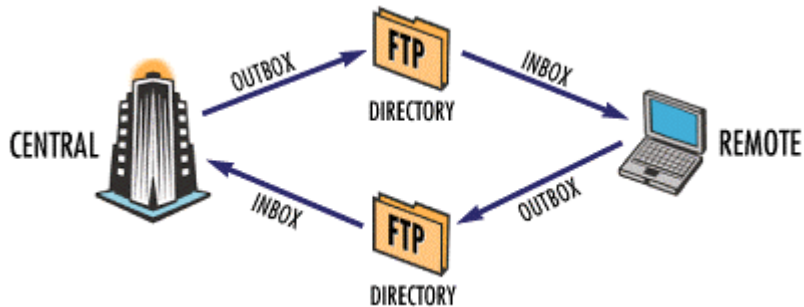


Server Log and Reports

Data Synchronization Server keeps a detailed log of each synchronization process. Details of interest can be viewed and printed. A Server Setup Report is also available, listing settings for each site. This allows the ability to quickly view and analyze the current settings to determine if any need to be adjusted.

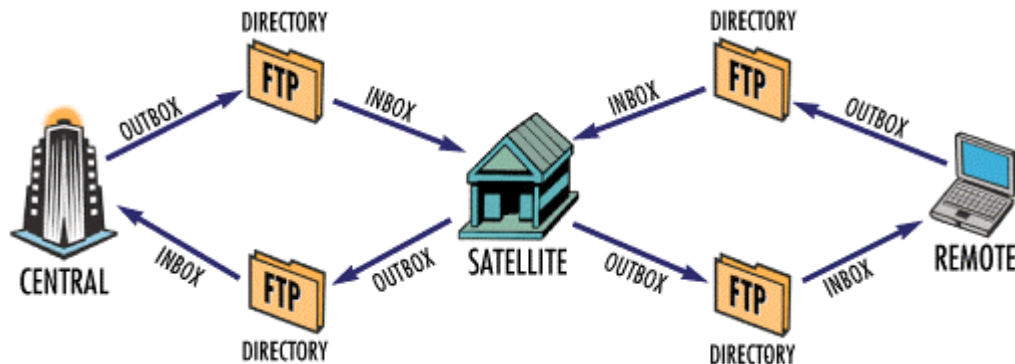
FTP Transfer

FTP transfer is automated file transfer of Data Synchronization packets via the Internet. It allows a site to automatically establish an Internet connection and send outbox packets to an FTP site. Packets may also be retrieved that have been sent from other sites to the FTP site and copied into the inbox. Other data synchronization applications use a direct connection to transfer data. This can be very expensive when a large amount of information is exchanged on a daily basis. TeleMagic's method of transferring data costs far less than a direct connection, simply because the only expense associated with it is the cost of an Internet Service Provider.



Packet Transfer via E-mail

There is also the option of using TeleMagic Internet Mail to transfer packets. Packets are automatically attached to e-mail and transferred between sites. This process can be handled as a part of regular synchronization, or off-loaded to an Automation Server queue and processed there. Transferring packets automatically via e-mail avoids the necessity of maintaining an FTP site and allows the option of utilizing the Automation Server to handle the actual transfer of packets.



TeleMagic NetClient

Another tool that has been provided to facilitate remote data access is TeleMagic NetClient. This is a separate program that allows direct access to TeleMagic data over the Internet. TeleMagic, TeleMagic NetClient and DSS have all been designed to work together to support your users. You have the flexibility to have a combination of people in an office, accessing TeleMagic directly or through TeleMagic NetClient on the LAN, remote users accessing it through TeleMagic NetClient over the Internet, and field reps

on the road using laptops and DSS, with complete confidence that everyone is getting the most accurate, up-to-date information available.

Users working with DSS maintain a separate installation of TeleMagic, and pass changed data back and forth in packet files. DSS allows remote users access to the full power of TeleMagic, but changes are only reflected when a packet is received. Users working on TeleMagic NetClient are using the client as an interface to work directly with data that resides back at the central, satellite or remote installation.

Users who need immediate access to data and have Internet connection available may want to utilize the benefits of TeleMagic NetClient. Users who have situations where they do not have immediate Internet access, or need access to some of the more advanced TeleMagic Enterprise functionality and synchronization options will want to utilize DSS.

Conclusion

The Data Synchronization Server for TeleMagic Enterprise creates an informational power center within a company. Not only can TeleMagic adapt to any company, but also it can adapt to the individuals within a company. The Data Synchronization Server enables even remote users to access customer data. The complete customizability allows companies to view the data the way that works best for the company. While every company is different, TeleMagic Enterprise, along with the Data Synchronization Server, helps companies take full advantage of that difference. By having complete control of how information and data is distributed throughout a company, TeleMagic becomes the solution for greater business success. TeleMagic Enterprise and Data Synchronization Server helps to create and maintain a competitive edge that will keep *Business Success in Motion*.

