

**MAGIC**  
Integrating Magic  
Tomorrow's Solutions Software  
Today Enterprises

# Magic CRM Suite

## White Paper

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# Table of Contents

	<b>Executive Summary .....</b>	<b>1</b>
1.	<b>Magic CRM Suite Objectives .....</b>	<b>2</b>
2.	<b>Magic CRM Suite Comprehensive Solution .....</b>	<b>3</b>
	2.1 Architecture .....	3
	2.2 Integrated Approach .....	3
3.	<b>Magic CRM Suite Modules .....</b>	<b>6</b>
	3.1 Magic eContact .....	6
	3.2 Magic eMerchant .....	7
	3.3 Magic eService .....	7
	3.4 Magic eSales .....	7
	3.5 Magic eCapture .....	8
4.	<b>A CRM Enterprise Scenario .....</b>	<b>8</b>
5.	<b>Magic CRM Suite Checklist .....</b>	<b>9</b>
6.	<b>Conclusion .....</b>	<b>11</b>

## Executive Summary

**C**ustomer Relationship Management (CRM) is the buzzword of today that is promising greater return-on-investment (ROI) for tomorrow. The mandate to actively pursue, enhance, and manage the relationship with customers is seen as the mechanism to achieve the competitive edge required for greater profitability. CRM is seen not only as a quickly growing application area, but also as a new business model for an enterprise's operation vis-a-vis its customers.

The importance of customer retention has surfaced as a strategic objective for enterprises worldwide as it has become clear that business with a new prospect is five times more costly than with an existing customer. In addition, industry statistics show that 80% of a company's income is from its existing customers. Statistics also show that 68% of customers who walk away from a relationship with a vendor do so because of poor customer service.

The Magic CRM Suite furnishes an answer to this market demand. Magic's comprehensive and integrated approach to CRM enables optimization of customer-related business processes, ensuring a superior customer experience. Satisfied customers are more loyal customers and, as such, directly influence the company's bottom line.

The Magic CRM Suite provides solutions in the key areas of sales, marketing, and service, the

three primary customer contact points. The modules, eContact, eService, eSales, eMerchant, and eCapture work from a shared customer and enterprise repository. The Magic CRM Suite modules have links to the back-office systems, providing an integrated enterprise solution for the user. This consistent picture of the enterprise is obviously critical for customer satisfaction.

The Magic CRM modules are enhanced with analytical capabilities. Management has up-to-date knowledge of customer satisfaction and can easily get involved in solving situations that need immediate attention. Current financial and process information is readily available to ensure input for correct critical management decision-making. With the Magic CRM Suite, management has its finger on the pulse of the organization at all times.

The architecture of the Magic CRM Suite has been carefully designed to ensure meeting challenging requirements of the market. The suite's modules use a set of shared components to maximize consistency and efficiency. The reuse of many of the underlying components is responsible for the common look-and-feel, as well as for the uniform behavior of the same tasks across modules. At the heart of the Magic CRM Suite is Magic's state-of-the-art core technology. The world-renowned benefits of this technology have been proven time and again and are utilized here as the foundation of the Magic CRM Suite.

This paper discusses Magic Software Enterprises' approach to the important concept of CRM and introduces the Magic CRM Suite. For further discussion and general analysis of today's hot industry trend please refer to The CRM Phenomenon White Paper.

## 1. Magic CRM Suite Objectives

Magic Software Enterprises has adopted a comprehensive, integrated approach to CRM. The Magic CRM Suite focuses on two primary objectives:

### a. Superior customer experience

Magic's comprehensive CRM solution ensures that the customer receives consistent accurate and relevant information. This information is tailored to specific needs and is accessible via the preferred customer's media when it is needed. The Magic CRM Suite supports the notion that there is a direct correlation between a satisfied customer, a loyal customer, and an increase in the company's profitability.

Research has shown that the total value proposition of a product with customer service is significantly higher than the product alone. Frequently customers walk away from a relationship with a vendor because of poor customer service. This is of a particular concern since 80% of a company's income is from its existing customers.

### b. Real time business pulsing

Magic's CRM Suite provides the ability for management to be constantly aware of the enterprise's performance relative to the company's expectations of customer-related activities. Upper management will have the information and tools to give clear direction and to provide conflict resolution for all matters that concern the customer. This up-to-date knowledge ensures correct

decision-making and better control of the business.

Enterprise-specific business rules are used to configure the Magic CRM Suite so management receives the most accurate picture of the organization's current status. Management has real-time information on customer satisfaction, as well as on the current financial status. Management has the tools to get involved when customer service ratings are below a certain threshold, as well as when particular salespeople are not delivering according to the defined process. Magic's CRM solution allows management to keep a finger on the pulse of the market all the time.

The Magic CRM Suite is particularly concerned with the real-time flow of information within the enterprise. A customer-centric approach ensures that customers receive the same high quality of treatment no matter with which department the interaction is taking place.

The requirement for an integrated approach goes beyond minimizing duplicate efforts and ensuring that crucial information isn't missing. Bad decisions stemming from wrong information frequently result in dissatisfied customers and lost deals. The following unfortunate scenario takes place all too frequently:

A sales-person is in the process of negotiating a high value deal with an existing customer who up to now has done little business with the organization. In this hypothetical situation, it so happens that this same customer chooses to contact Customer Service for assistance. Because the customer is flagged in the Customer Service system as one that has relatively low priority, our high value prospect will most likely receive

second rate service. This less than desired level of service can easily influence the potential prospect and cause a lost deal. And the sales person might never even know the cause.

It is the goal of the Magic CRM Suite to ensure that critical business information be available in real-time. Fulfillment of this goal will avoid business errors that are caused by lack of information and coordination, in addition to ensuring enhanced customer satisfaction.

Magic's CRM suite manages all customer interactions from a joint enterprise process view. It is of utmost importance that the individual point CRM solutions throughout the customer interaction cycle are coordinated with the other steps in the process. Automating the activities that follow each customer contact enables each step in the fulfillment process to benefit from all the accumulated knowledge in the enterprise. Magic's CRM Suite has been designed around this comprehensive customer-care concept.

## 2. Magic CRM Suite Comprehensive Solution

### 2.1 Architecture

The following diagram, figure 1, gives a conceptual, layered approach of the integrated Magic CRM Suite. This comprehensive solution covers the primary customer contact points of Sales, Marketing, and Service.

Solutions in each of these areas are provided by Magic's CRM modules: eMerchant, eService, eContact, eSales, and eCapture. The modules share a common customer and enterprise repository and have links to analysis capabilities and hooks to back-office systems.

These modules are built on Magic's shared low-level components. Common functionality is thus reused among the CRM modules. The shared components are built on top of the Magic engine. The Magic engine provides the state-of-the-art technology that is at the core of the Magic CRM Suite. This technology enables multi-platform and database support, ensuring utmost flexibility and adaptability in diverse enterprise environments.

The rest of this paper goes into further detail describing the Magic CRM Suite offering, as well as into the underlying concepts behind the proposed solution.

### 2.2 Integrated Approach

The Magic CRM Suite objectives are best met with an integrated view of the customer where customer relationship management is a proactive process aligned with a customer oriented business philosophy. The various disparate point solutions whether they come from Sales, Marketing, or Service are combined into a single coordinated solution. The customer processes are managed as such rather than as independent activities. Information about the customer must be up-to-date at all times and from every customer-oriented application. This approach will ensure an accurate picture that is crucial for both increased customer satisfaction and for the enterprise's business success.

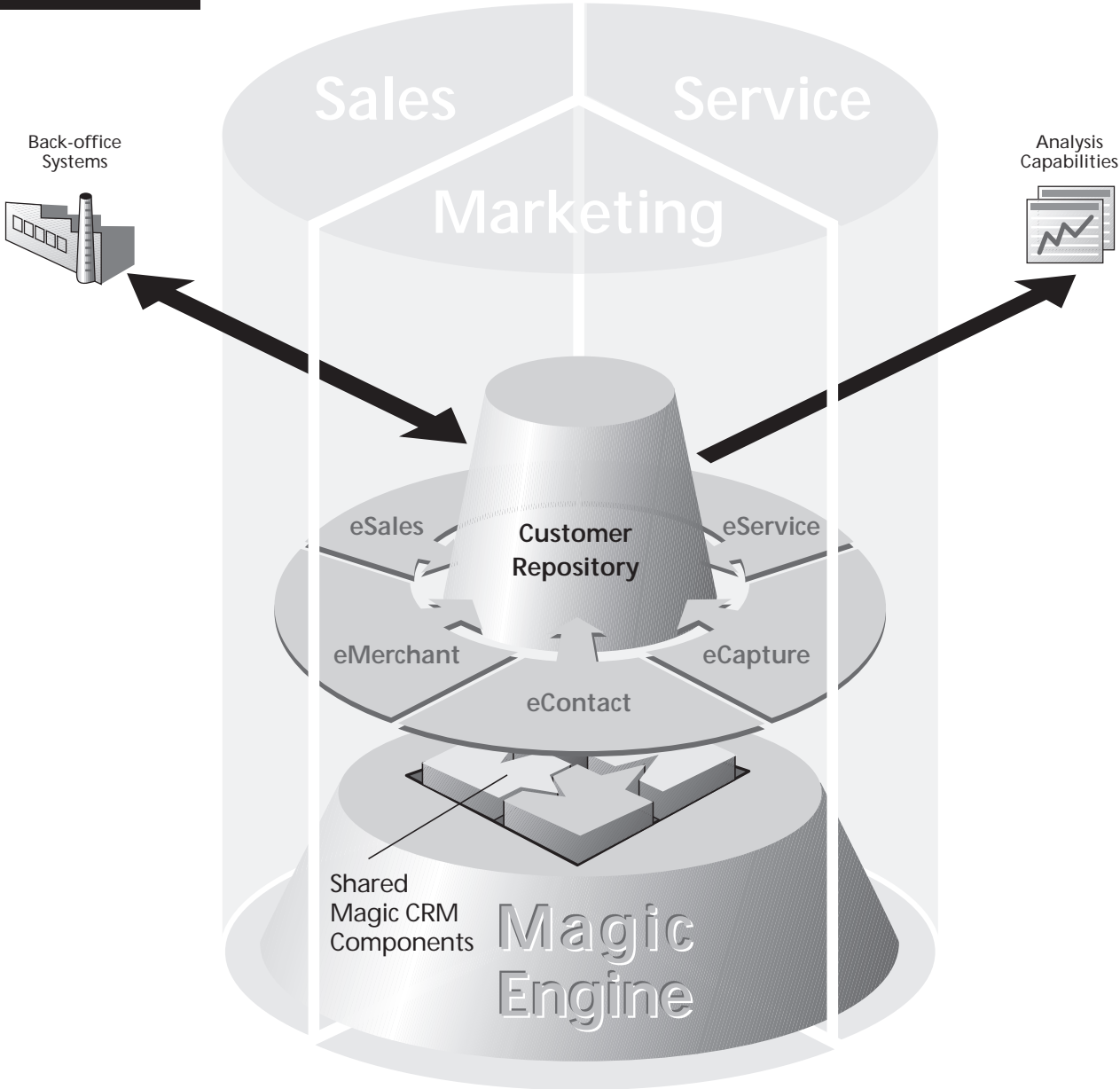
The Magic CRM Suite provides the capability for integrating the front and back-office applications to ensure an improved and more consistent customer experience, as well as enabling management to constantly be aware of the entire enterprise operation. This integrated approach provides a win-win situation for both the customer and the enterprise.

### 2.2.1 Shared customer repository

The shared and integrated customer repository is at the heart of the Magic CRM Suite. All CRM applications have a consistent customer view enabling each employee who is in contact with

the customer to evaluate all aspects of the relationship of the customer to the enterprise. All customer data is entered to a central location and is then available from all points of customer interaction.

Figure 1  
Magic CRM Suite:  
Architecture diagram



True customer follow-up enables a service level that not only causes greater customer satisfaction, but also greatly optimizes and coordinates the workloads in the different departments. A unified up-to-date view of the customer provides real-time information that ensures accurate data, facilitating intelligent management decisions throughout the customer life cycle.

### 2.2.2 Shared enterprise repository

To best fulfill the customer-centric approach the enterprise's employees must have easy access and knowledge of each other. Employees must be able to communicate easily for a true cooperative experience. It is paramount that the enterprise employees have a clear indication of each other's positions, tasks, priorities, and constraints in order to gain a supportive working relationship

The task of better customer relationship management is greatly facilitated by a common enterprise repository. This shared view brings together employees from all departments and offices, all with a common goal, to provide a consistent and reliable service experience throughout the customer life cycle. The enterprise repository supports the strategy of putting the customer at the center throughout all customer-related interactions that are performed across the enterprise by a wide set of employees.

### 2.2.3 Shared functional components

In addition to the two shared repositories discussed above, there are many shared components used in the Magic CRM Suite. The common denominator of the modules in the CRM Suite is large and therefore calls for reusing shared components to maximize efficiency and integration of the Magic CRM Suite. Four important examples are discussed here:

#### a. Web infrastructure

The web infrastructure utilities supply a consistent basis for the Magic CRM Suite modules. This infrastructure consists of utilities such as session management, locking strategies, and multi-currency and multi-lingual capabilities. This component is also responsible for supplying a common web look-and-feel. The common web infrastructure also allows an easy incremental implementation of the Magic CRM Suite modules at the customer site.

#### b. Workflow & business rules

This mechanism supports the workflow component of the Magic CRM Suite. It is essential for enterprise coordination, distribution of tasks, prioritization, and management of business processes. Magic's CRM Suite workflow allows customer-related interactions to be part of an overall service workflow, enabling dynamic and seamless cross-functional task execution. The entire correspondence between the various agents and the customer is managed by this system until brought to a satisfactory resolution. The centralized web and e-mail service workflow enables coordinated service across CRM modules. It is vital that the integrity of the enterprise's business rules be maintained across the modules to ensure a consistent and accurate business strategy.

#### c. Products and promotions

Functions related to the product and its promotion are included in this component. Cataloged product information, pricing, and inventory, as well as order shipping

and delivery status are relevant across the enterprise for providing better customer care.

Product promotion, whether it is via advertising, special deal suggestion, or cross-selling/up-selling, is a component that must be available to multiple modules, ensuring the maximization of enterprise communication. In this way the enterprise can reach additional opportunities, while providing an enriched and rewarding interaction for the customer.

d. **Back-office API**

To support the full customer life cycle, the Magic CRM Suite modules communicate with back-office applications. The connection to existing enterprise applications is done via an API or through specific customization. The integration includes business process as well as data integration. The Magic CRM Suite is designed so legacy applications can be incorporated as part of the total offering. Existing front- and back-office applications need not be thrown away. Rather, past investments in hardware, software, and technical expertise are protected by incorporating legacy solutions into the Magic CRM Suite.

### 3. **Magic CRM Suite Modules**

The Magic CRM Suite consists of a growing number of modules that operate upon the technology and business philosophy that has been described in this paper. The flexibility inherent in the Magic CRM Suite enables simple integration of modules into the over-all solution. The open architecture allows for the easy

expansion of the offering as new requirements emerge and as new modules become available.

Magic Software Enterprises realizes that often a business decision calls for an incremental CRM solution. Even though Magic's CRM Suite has been designed around an integrated complete solution, the company is well aware of the business realities that often require an evolutionary approach rather than a total revolution.

Therefore, the Magic CRM Suite modules are also provided as stand-alone solutions and have been designed for independent installation.

Below is a short description of the following modules of the Magic CRM Suite: eContact, eMerchant, eService, eSales, and eCapture. More detailed information on each of these modules is available in separate documents.

#### 3.1 **Magic eContact**

The corporate call center is often the chief means of interaction with the customer. eContact manages every aspect of the call center, from sales and marketing to customer care and support. eContact's ease of use, customization, and integration capabilities make it the most rapid-to-implement contact center system available on the market.

eContact completely automates the workflow of the call center, allowing the call center to handle a greater volume of customer calls in a shorter period of time. With eContact, the call center manager defines all aspects of customer care, ensuring that business rules and customer care strategy are fully implemented.

## 3.2 Magic eMerchant

Magic eMerchant is the perfect combination of e-commerce and CRM capabilities. Magic eMerchant's customizable e-commerce platform combines an industrial strength e-commerce solution for supply chain management with a powerful, personalized virtual order center for the corporate customer. Magic eMerchant delivers enterprise-level processing power and security along with rapid integration with back-end systems, and is customized to fit corporate business rules.

Magic eMerchant brings CRM capabilities to the web with a fully personalized interface for the company's business customer, combined with a powerful product configurator. With Magic eMerchant, the corporate website can conduct completely customer-centric e-commerce, including product catalogs and pricing structures specific to the customer, while ensuring that all-important information regarding customer preferences is retained throughout the interaction.

## 3.3 Magic eService

Magic eService brings corporate CRM even further by providing fully web-based customer service. Magic eService is designed for ongoing service interactions, where customer queries require several exchanges between the customer and the service agent before being brought to resolution. Magic eService allows customers, as well as agents, to track all their service requests via web or email, and provides personalized home pages for both customers and agents. Customers personally close their service requests when

they feel that their questions have been answered adequately, or link new service requests to earlier requests.

Allowing round-the-clock, follow the sun service via its web-based technology, Magic eService ensures that service requests reach the appropriate agent or agent team based on customer characteristics and product expertise. Magic eService ensures that no customer request goes unanswered, via a sophisticated system of agent and manager alarms.

## 3.4 Magic eSales

Magic's CRM capabilities are extended to the sales enterprise via Magic eSales. Magic eSales allows sales professionals to be significantly more effective, assisting the sales process, providing a better understanding of the steps in the sales cycle, and increasing the value of each transaction. Magic eSales empowers the sales manager with a set of tools that allow full control of the sales force, including sales force targeting, opportunity management, forecast management, win/lose analysis, competitor information and more. Magic eSales provides an enterprise snapshot, combining the data of all business units, assisting global management in controlling the dispersed worldwide enterprise as a single business unit.

Magic eSales ensures that the enterprise has a complete view of the customer. By allowing the relevant salesperson to see all customer interactions across the corporation, eSales provides consistent communication with and treatment of the customer.

### 3.5 Magic eCapture

Magic eCapture provides the customer feedback and information necessary for any CRM strategy. With Magic eCapture, relevant leads are easily gathered via the corporate website, together with information specific for the lead type. In addition, Magic eCapture provides dynamically created, web-based customer surveys according to the definitions of the customer relationship manager. Magic eCapture's surveys and lead capture forms are specific to the web site area, ensuring that the relevant information is provided according to the specific interest of the customer.

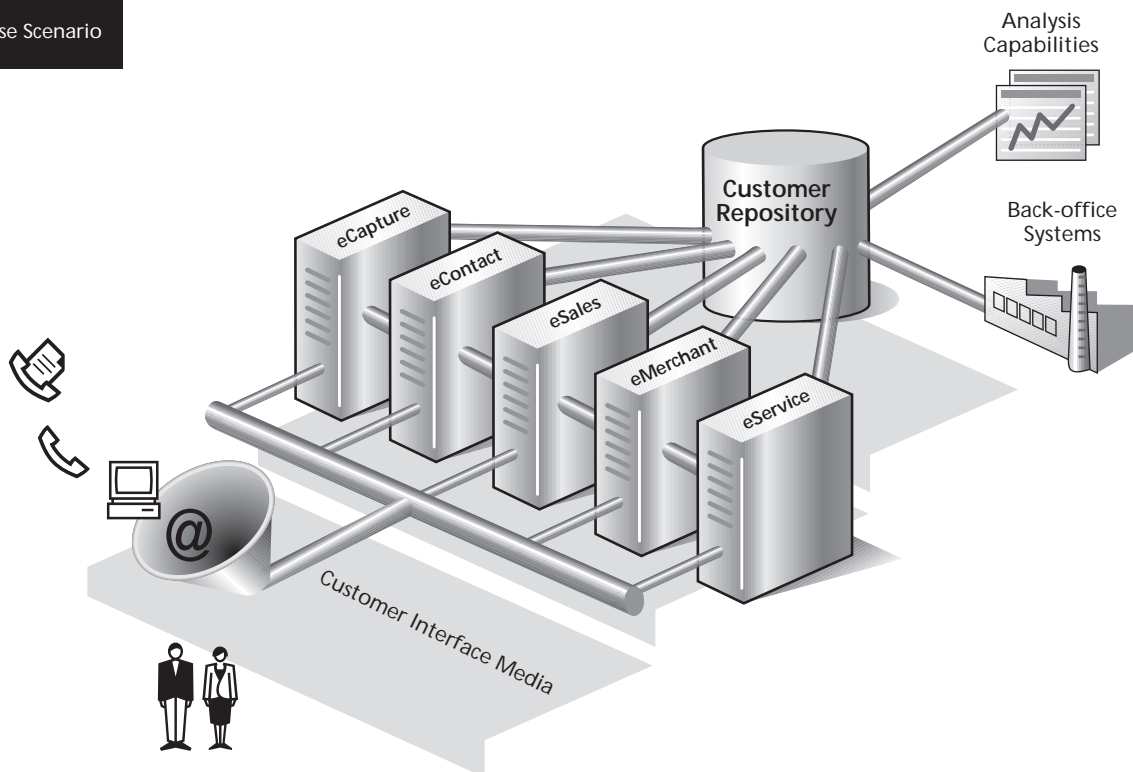
Magic eCapture automatically routes any leads to the appropriate branches and salespeople, according to customer

characteristics, and sends out follow-up emails to both the customer and the salesperson to ensure ongoing treatment.

## 4. A CRM Enterprise Scenario

The Magic CRM Suite is the foundation for an enterprise business strategy and the core on which the business processes operate. There are many possible routes through the enterprise. The following diagram, figure 2, portrays a specific data flow within an organization implementing the Magic CRM Suite. This example is brought here to illustrate the coordinated use of the various modules of the Magic CRM Suite.

Figure 2  
A CRM Enterprise Scenario



In this hypothetical enterprise scenario, a lead comes in to the Marketing department via the web. This lead is captured in the Magic eCapture module. Note that the qualification of the lead is performed on the basis of attributes defined in the Magic eCapture system and stored in the central Customer Repository. Depending on the customer information captured, the leads are either funneled automatically to the Marketing department for second-level qualification or as targets for specific campaigns using Magic eContact.

When the leads are qualified and the details are verified, they will then be streamed to the Sales operation, ensuring immediate action by the sales-force with the aid of Magic eSales. There is a consistent flow of information between the Sales and the Marketing departments regarding these prospects. Both departments are able to plan sequential or parallel moves, combining their efforts toward a common goal.

Further interaction by the sales-force using Magic eSales eventually leads to a purchase order. Alternatively, a purchase order can come in directly from the customer via Magic eMerchant. At this point, from either Magic eMerchant or from Magic eSales, the back-office systems are accessed for order fulfillment. In addition, the service contract flows to the Service department. The Magic eService module is used here to ensure enhanced customer care, service, and support.

At any point during the business process, management can get up-to-date information on the enterprise's operation. The Magic CRM Suite's analysis capabilities provide real-time business pulsing and up-to-date knowledge, ensuring correct decision-making and better control of the business.

This integrated CRM view, which is provided by the Magic CRM Suite, is the foundation for an enhanced customer experience, leading to direct results on the organization's bottom-line.

## 5. Magic CRM Suite Checklist

The Magic CRM Suite has many advantages that are inherent in its architecture as described in this paper. Some of the benefits stem from the Magic technology at the core of the Magic CRM Suite. Other benefits are due to the shared components and the integrated approach that has been adopted as a major directive for the Magic CRM Suite. The important underlying features in the Magic CRM Suite ensure that real enterprise concerns are being addressed.

### a. Integrated customer view

The Magic CRM Suite provides a fully integrated shared customer view. This philosophy is carried further through the fulfillment process. The Magic CRM Suite enables integration with the back-office and third-party products to ensure that all customer-related applications have uniform, up-to-date information. The Suite's interoperability with legacy systems makes end-to-end customer service a reality. The interfaces to the disparate information systems are not only to map the data from one application to another, but also to use the information in the context of the business processes for more effective and consistent service.

**b. Manageability**

It is imperative that the CRM business philosophy be managed from the top and by high executives across all the relevant customer-facing departments. The Magic CRM Suite provides an arsenal of tools for management to assist in the forecasting, planning, coordinating, and tracking of tasks across the enterprise. Workloads need to be intelligently routed to available resources, bottlenecks lifted, and analysis of ROI must be an integral part of the CRM business process. A well managed CRM strategy will provide an enhanced customer experience, directly influencing the company's profitability.

**c. Multiple communication channels management**

The Magic CRM Suite understands the significance of coordinating the diverse communication channels. The customer should be able to contact the enterprise via any media: phone, fax, web, email, chat, video or any other in the future, and receive the same up-to-date information.

**d. Intelligent workflow**

Customer management goes well beyond managing data in a particular front-office application. The business processes go across applications and must be managed at each step of the process to allow for better customer management. Specific customer interactions frequently trigger actions in multiple departments, which are then coordinated by the Magic CRM Suite to ensure optimization of resources and the most satisfactory results for both the enterprise and the end customer.

**e. Customization and personalization**

CRM is actually a business strategy and the technology is an enabling factor to implement this strategy. Companies clearly have different business strategies and therefore must have the CRM solution tailored to meet their own enterprise's needs. The Magic CRM Suite is built of modular components that can be easily customized to the enterprise's specific requirements.

**f. Scalability**

A successful business most likely will grow, particularly with the advantage of the web, which facilitates a global presence and reaching out beyond geographical boundaries. The technological foundation on which the CRM business strategy lies must provide for such expansion. Long term success is dependent on the scalability of the solutions that are being offered today. It is not only the web application that must be scaled. Also the call center must be able to grow as more calls actually come in from additional web exposure. The Magic CRM Suite is based on Magic's proven scalable architecture and provides the foundation for the enterprise's growing needs.

**g. Flexibility and adaptability to change**

As new requirements come up, or new technologies emerge, the Magic CRM Suite's architecture will enable a response to change. Shifting market conditions often demand flexibility from the solution's architecture. This is true for the fast growing area of communication channels, as well as for new operating systems such as Linux.

## h. Investment protection

It is essential that new solutions integrate with the existing underpinnings of the organization. The Magic CRM Suite has been designed to enable smooth integration of existing systems and data with the new technology, thus ensuring the ongoing functioning of legacy systems.

## i. Time-to-market

Today's competitive market requires not only the best solutions, but also those that can be up and running faster than the competition. The Magic CRM Suite is built on the Magic engine technology, which has proven time and again its competitive advantage in getting solutions deployed in record time, particularly in heterogeneous environments. This advantage of having a production system up and running sooner, speaks directly to the requirement for faster ROI.

unprecedented and can be confusing and misleading.

As so many vendors are jumping on the CRM bandwagon, it is particularly important to be careful when choosing a CRM solution provider. As products become commodities and all other things being equal, the added value provided by Customer Relationship Management will determine the success or failure of one player over another. Since a corporation's installed base is one of its greatest assets it must be carefully managed with superior service to ensure acquiring, developing, and retaining this asset.

Magic Software Enterprises has identified the market requirement for a comprehensive CRM solution. The Magic CRM Suite introduced in this paper describes the key individual modules required for a total solution. Magic is well aware of the business realities and has incorporated an evolutionary rather than revolutionary approach to an overall CRM solution.

The Magic CRM Suite supplies management with the tools and capabilities to ensure a superior customer experience, which is directly correlated with the company's profitability. This paper illustrates Magic's competitive advantage in answering the true needs of world-wide corporations.

## 6. Conclusion

The CRM market is hot and is said to be getting hotter. Analysts estimate that the market will nearly triple over the next three years, reaching \$11 billion by 2003. CRM is becoming one of the largest application segments ever. This phenomenon is not only a new application area but will eventually change the business models of the enterprise. One need just look around and count the number of CRM players, and note their line of business; CRM is flooded with vendors from all areas. Traditional vendor categories no longer fit and the accepted boundaries among hardware, software, and service vendors are blurred. The wide variance of players in the hyped CRM market is

**Australia**

Magic Software Australia  
Tel: (61) 2-9386-0560  
Fax: (61) 2-9386-0562  
amiry@magic-sw.com

**France**

Magic Software Enterprises France  
Tel: (33) 1-49-04-1414  
Fax: (33) 1-49-04-1415  
infofrance@magic-sw.com

**Germany**

Magic Software Enterprises Germany  
Tel: (49) 89-962-73-0  
Fax: (49) 89-962-73-100  
dtimmerm@magic-sw.com

**Hungary**

Magic (Onyx) Software Enterprises  
Hungary Ltd.  
Tel: 36-1-216-9910  
Fax: 36-1-216-7271  
sales@onyx.hu

**India**

Magic Software Enterprises India Pvt. Ltd.  
Tel: (91) 20-426-3025  
Fax: (91) 20-426-3085  
uchil@magic-sw.com

**Israel**

Magic Software Enterprises Ltd.  
Tel: (972) 3-538-9408  
Fax: (972) 3-538-9402  
sales@magic-sw.com

**Italy**

Magic Software Enterprises Italy s.r.l.  
Tel: (39) 02-760-200-67  
Fax: (39) 02-760-208-11  
info-it@magic-sw.com

**Japan**

Magic Software Japan K.K.  
Tel: (81) 3-5365-1600  
Fax: (81) 3-5365-1690  
eyal@magic-sw.com

**The Netherlands**

Magic Software Enterprises Nederland  
Tel: (31) 30-656-6266  
Fax: (31) 30-656-6277  
info-nl@magic-sw.com

**Thailand**

Magic Software (Thailand) Corp Ltd.  
Tel: (66) 2-955-0555  
Fax: (66) 2-955-0339  
bunrak@betagro.com

**UK**

Magic Software Enterprises (UK) Ltd.  
Tel: (44) 1344-667-000  
Fax: (44) 1344-667-001  
ukinfo@magic-sw.com

**USA**

Magic Software Enterprises Inc.  
Tel: (800) 345-6244  
(949) 250-1718  
Fax: (949) 250-7404  
info@magic-sw.com

**Canada**

Magic Software Enterprises of Canada, Inc.  
Tel: (800) 345-6244  
(514) 334-3878  
Fax: (514) 334-4368  
info@magic-sw.com

**International**

Magic Software Enterprises Ltd.  
Tel: (972) 3-538-9292  
Fax: (972) 3-538-9333, 538-9393  
sales@magic-sw.com

**Internet**

e-mail: sales@magic-sw.com  
http://www.magic-sw.com

Magic Software Enterprises  
A Formula Group Company

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www.magic-sw.com

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