



### Product Forum:

Please visit our Forum for additional information or to post a question.

### Product Demo & Training Videos:

Macintosh Download

Windows Download

Online Training Videos

### Pricing:

(Pricing subject to change with out notice. Please consult the web site for the latest information.)

Core² CRM . . . . . \$499.95

Core² CRM With:

1 FileMaker Pro Seat . . . . . \$784.00

5 FileMaker Pro Seats . . . . . \$1,853.70  
(1 year maintenance included)

5 FileMaker Pro Seats and  
1 FileMaker Server . . . . . \$2,636.50  
(1 year maintenance included)

10 FileMaker Pro Seats and  
1 FileMaker Server . . . . . \$3,824.00  
(1 year maintenance included)

Core² CRM with Invoices . . . . . \$999.95

### System Requirements:

(System requirements are subject to change with out notice. Please consult the web site for the latest information.)

- Windows® XP/Vista/7
- Mac OS X v10.4.8 or 10.5
- FileMaker Pro 8.0v3 through 11 for CRM Module
- FileMaker Pro 9.0v3 through 11 for Invoice Module

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Core² CRM is the perfect multi-user, cross-platform solution for getting your company's data centralized and organized. Built using the award winning FileMaker® Pro database engine, the Core² CRM allows you and your entire company to intuitively manage all your company and individual contacts, letters, faxes and e-mail correspondence history, group calendaring, employee task lists, marketing e-mail or letter campaigns, notes and associated documents. The Core² CRM can be used "as is" or can be customized to fit your specific needs.



#### Contacts:

Designed to handle both individuals and organizations and their relationship to each other.



#### Correspondence History:

Have a complete correspondence history for every contact and every employee for all faxes, letters, e-mails and notes.



#### Calendar:

Designed to handle individual and overlapped group calendars.



#### Tasks:

Manage tasks for yourself or assign them to others.



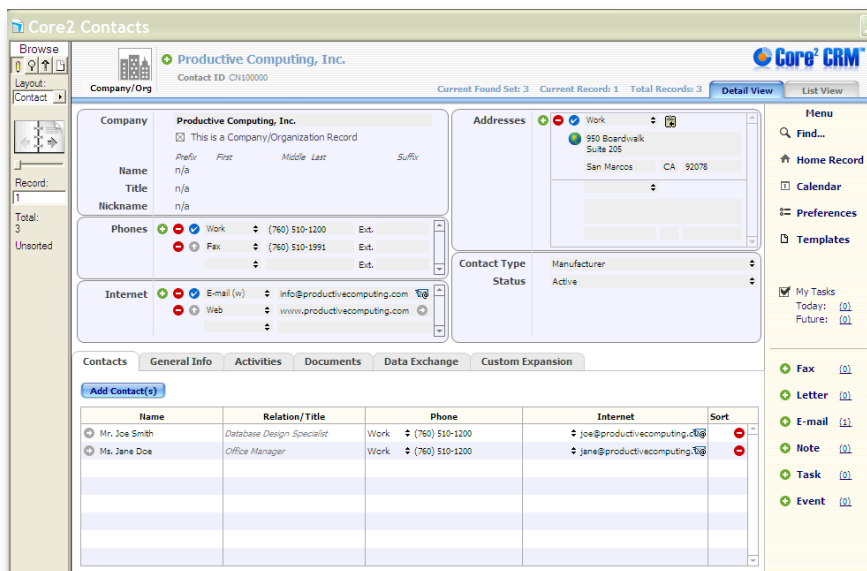
#### Documents:

Have a centralized repository for your documents so anyone can see and access any documents associated with a respective contact.



#### Data Exchange:

Specifically designed to exchange data with either Microsoft Outlook® or Entourage®, QuickBooks® and Apple's® Address Book or iCal.



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# Why Core<sup>2</sup> CRM?



## Centralized Rolodex of Contacts:

Your entire organization can simultaneously access, share and update a single centralized rolodex of contacts. Cross-link multiple individuals to an organization/company or multiple companies to an individual and much more.

## Complete Correspondence History:

Have a complete linear correspondence history for every contact from every employee to include faxes, letters, and e-mails from conversations.

## Company Shared Calendar:

Have a calendar system that your entire organization can share, view and schedule client appointments, employee vacations, internal meetings and everything else you would put on a calendar. You can view calendars individually or overlap multiple calendars to find availability!

## Centralized Task and Document Management:

Have a centralized task management and repository for your documents. Now anyone can see what tasks they have for the day, week or month as well as see documents associated with a respective contact.

## Mail Campaigns:

Easily maintain, distribute and track e-mail or letter campaigns. Quickly see for any given contact what email campaigns they have received.

## Customer Invoice and Payment History (optional):

Have an easy to use and centralized invoicing system where employees can create and view invoices and payment history without giving those employees access to sensitive accounting information. Can be configured to facilitate pushing and pulling of data to and from QuickBooks with our FMBooks Connector plug-in.

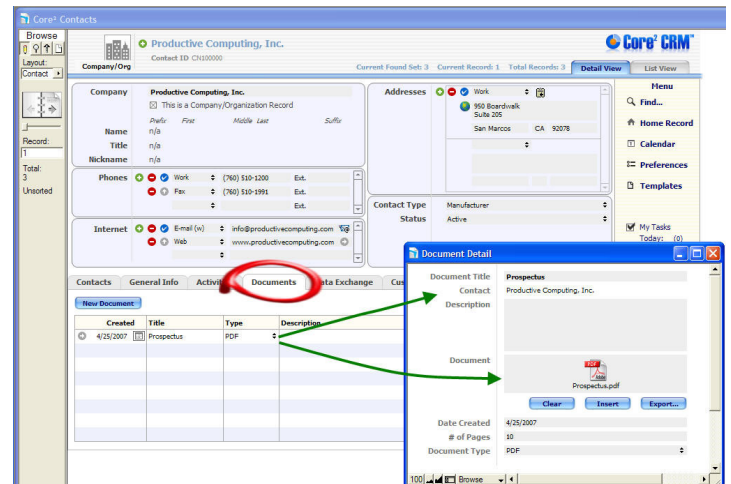
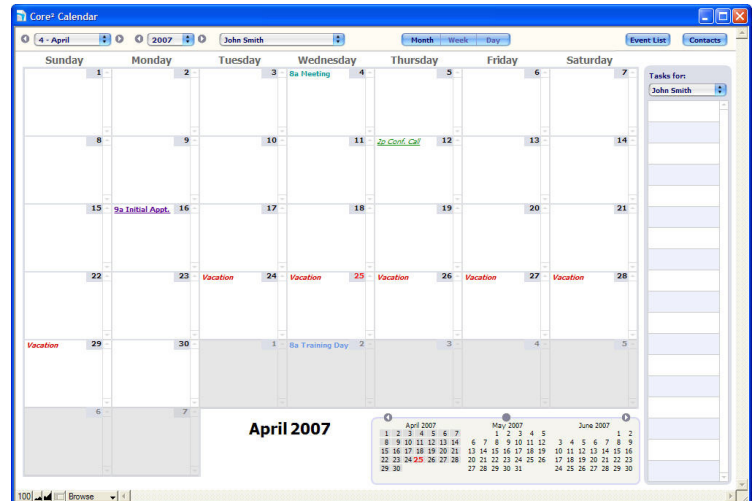
## Integrate with Outlook, QuickBooks, Address Book, iCal or Entourage:













Specifically designed to exchange data with either Microsoft Outlook® or Entourage®, QuickBooks® and Apple's® Address Book and iCal. Although the Core2 CRM is preprogrammed to exchange data with these 3rd party applications you will need to purchase the plug-ins separately.

Push your customer contact information and other pertinent billing data to QuickBooks to eliminate double entry. Additional integration with these applications can be customized.

## Easily Customized:

The Core<sup>2</sup> CRM is sold as an "unlocked" solution and is built on the award winning FileMaker Pro database technology. This combination allows you to add modules or features to Core<sup>2</sup> CRM that are specific to your organization. For more information on customizing this solution contact us or fill out a Request For Quote form.



Contacts									
General Info		Activities		Documents		Data Exchange		Custom Expansion	
Display: <input type="checkbox"/> Email <input type="checkbox"/> Fax <input type="checkbox"/> Letter <input type="checkbox"/> Note <input type="checkbox"/> Task <input type="checkbox"/> Event									
<div>All...None...</div>						Last Contacted: 7/18/2007 12:15:26 PM			
Date/Due	Time	Type	Subject	Priority	<input checked="" type="checkbox"/> From/Assigned by	To/Assigned To			
 Wed, 07/18/07		Task	Call Mr.	1	<input type="checkbox"/> Admin	 Admin	 		
 Fri, 07/06/07	9:55 AM	Email	Sample Template for use with Letters, Faxes		<input type="checkbox"/> Admin	 Mr. John Doe	 		
 Tue, 07/10/07	9:55 AM	Note	Call Mr. Smith		<input type="checkbox"/> Admin	 Mr. John Doe	 		

## Plug-in Information:

Successful integration of FileMaker plug-ins requires the creation of integration scripts within your FileMaker solution. A working knowledge of FileMaker Pro, especially in the areas of scripting and calculations is necessary. If after review of our overview videos, sample scripts and documentation you find you need assistance, please contact us or fill out a Request For Quote.

# Solution Support



After review please contact our Sales department should you have any questions as to which support option is right for you.

How do I know if my question falls under FREE or Premium Support?

## FREE and Startup Support Questions Include:

- Does your product do ".....?"
- Will your product work in this "....." situation?
- What are the software requirements to use your product and what is your pricing?
- I can't get your demo to install properly, can you help me?
- I am unable to register your product properly, can you help me?

## PREMIUM Support Questions Include:

- How do I .....?
- I don't understand your documentation, your demo or your videos. Can you walk me through how to use your product?
- I have read your documentation, reviewed the scripts in your demo files and watched your videos and I still cannot get your product to work correctly. Can you troubleshoot my solution to see why it isn't working?

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Productive Computing, Inc. wants to ensure you get the most out of your investment, therefore we have outlined a few support options below.



## FREE Support Options:

1. **Tutorial Videos:** Located on the Core2 CRM web site these videos cover everything from installation to setting up a mail campaign. Each topic is indexed allowing you to watch specific chapters.
2. **Documentation:** Each download comes complete with a documentation folder.
3. **Forum:** Visit our Forum for questions and answers on all of our products.
4. **Phone & E-mail Support:** Our Support Department is available by phone Monday - Friday 8am - 5pm PST at 760-510-1200 or by e-mail at support@productivecomputing.com. E-mails will receive a response within 1 business day



## BASIC Support Options:

Covers questions about installation, basic usability, functionality and troubleshooting. It **DOES NOT** cover questions on customizations, script writing or training.

1. **First 30 Days From Date of Purchase OR Delivery .....FREE**
2. **After 30 Days:** You pay for support as you need it by calling 760-510-1200 for one incident at a time..... \$39.00/call  
*NOTE: Should the incident be beyond our level 1 technician you will have the option of speaking to a level 2 developer, which falls under our Premium Support listed below.*
3. **Annual Support Contract:** This is designed to help the individual or small group by providing phone and e-mail support for a period of **12 months**.....\$399.00
4. **Installation Support:** In addition to the Annual Support Contract above you can get assistance with the installation and setup of the software for your office or remote locations.
  - a. FileMaker® Server Installation Including Setting Up a Backup Routine
  - b. Core2 CRM Installed On Your Server
  - c. Installation Of A Single Copy of FileMaker Pro + Instructions For Remaining Seats
  - d. Testing Client Access Into The FileMaker Database
  - e. Includes the Annual Support Contract described above

Per Site Installation.....\$499.00



## PREMIUM Support Options:

Gives you access to our level 2 developers for assistance with functions, script writing or plug-in integration.

1. **Paid Tech Support:** ..... \$155.00/hour  
*\*\*Billed by the minute so you are only billed for the time used to resolve the incident .*
2. **Customization Services:** If you feel that you need assistance with customizing any of our solutions to fit your specific business needs then please fill out a Request For Quote (RFQ) form by clicking on the following URL [www.productivecomputing.com/rfq](http://www.productivecomputing.com/rfq). By completing the RFQ our developers will be able to assist you in determining the best path to reach your objective whether it be technical support billable by the minute for small jobs, consultation to plan out the best solution to fit within your budget or a full project estimate for large jobs. We want to work with you in whatever capacity that is comfortable for your budget.



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# Additional Support Options:



Productive Computing, Inc. also offers the following additional support options:



**Training Services:** Getting your staff on board and using the new tools being implemented is critical to the success of any solution deployment. We offer the following approaches to learning our solutions as well as "*basic*" FileMaker Pro functionality. To make an appointment please contact our support department by phone or e-mail your inquiry to [sales@productivecomputing.com](mailto:sales@productivecomputing.com).

- a. 1 Hour Class For Up To 5 Staff Members. .... \$99.00  
- *Classes held at Productive Computing Headquarters in San Marcos, CA.*
- b. 1 Hour Online Webinar Q&A Session ..... \$99.00  
- *Remote training session to answer your specific questions.*

Please note that if Productive Computing, Inc. customized a solution for you, training is typically included in the estimate.



**Systems Assistance:** Small business that have limited or no IT Department can utilize our services to manage and maintain their FileMaker databases, networks and computer systems. Unattended maintenance issues can often lead to technical difficulties that can be costly to repair or recover from. Utilizing our IT Department you can be assured that your investment is protected and maintained properly through the following Mac - PC Cross Platform Services:

- a. Computer Consulting and Training
- b. On Site and Phone Tech Support
- c. iPhone and Smart Phone Integration
- d. Network Set-up and Configuration
- e. Backup Monitoring and System Setup
- f. Hardware and Software Sales
- g. Virus Protection & Spam Filtering Services

Pricing on the above services vary please contact our sales department at [sales@productivecomputing.com](mailto:sales@productivecomputing.com) or call 760-510-1200.

## Plug-in Information:

Successful integration of FileMaker plug-ins requires the creation of integration scripts within your FileMaker solution. A working knowledge of FileMaker Pro, especially in the areas of scripting and calculations is necessary. After review of our overview videos, sample scripts and documentation you find you need assistance please contact us or fill out a Request For Quote.

## Terms and Conditions:

These terms and conditions, as amended from time to time, govern the use of the Core<sup>2</sup> CRM or Core<sup>2</sup> Invoices by the individual designated as the Customer contact on the sales order ("You").

Technical Support: Productive Computing, Inc., reserves the right to limit each per incident telephone call to one hour and "per incident" to be defined as a single support issue or question. Support availability may occasionally deviate from stated hours due to downtime for systems and server maintenance, observed U.S. holidays or for other business reasons. Support services will be provided to You only. The resale or transfer of the Plan or any of the Plan benefits is strictly prohibited.

Support Topic Limitations: Support is limited to the following Core<sup>2</sup> CRM and Core<sup>2</sup> Invoice modules: installation, basic usability, and basic functionality, as described in Core<sup>2</sup> CRM and Core<sup>2</sup> Invoice documentation. Plan support does not cover inquiries on business practices. Productive Computing, Inc. does not provide support at your site or any other location. Productive Computing, Inc., shall not be required to provide any support relating to problems arising out of your use of the software in a manner for which it was not designed, or your negligence, misuse or modification of the solutions.