



Core3 is Ideal For:

- Small to medium size companies
- Consultants
- Construction
- Education
- Energy, environmental agencies
- Entertainment
- Financial advisors
- Government agencies
- Health services
- Printing & publishing
- Real estate
- Technology, engineering & science
- Travel & tourism
- and much more!

Product Tutorial Videos:

These videos were assembled to assist you with the basic installation, useability and functionality of our products.

Product Demos:

Mac: [Download](#)

Windows: [Download](#)

Product Forum:

Please visit our [Forum](#) for additional information or to post a question.

Product Questions:

Please e-mail your questions to sales@productivecomputing.com or give us a call at 760-510-1200.

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 10.4.11 - 10.7
- FileMaker Pro 11 or 12

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Updated: 5/10/12

The Core3 CRM provides a completely open and customizable CRM platform that includes company and individual contacts, tasks, letters, faxes, call log, e-mail, group calendaring, sales opportunities, estimates, orders, invoices, inventory, projects, time tracking, dashboards and reports. In addition, it is preprogrammed to work with 3rd party applications such as Outlook, QuickBooks, Apple Address Book, iCal, Authorize.net and PayPal through the use of optional add-on FileMaker Pro plug-ins.

The Core3 CRM allows you and your entire company to intuitively manage all your company and individual contacts, letters, faxes, calls and e-mail correspondence history, group calendaring, employee task lists, marketing e-mail or letter campaigns, notes and associated documents.

In addition to providing your company with a solid CRM foundation, Core3 has a complete sales and opportunities system that tracks opportunities, estimates, orders and invoices.

Not only can you track your sales leads and customers through the sales process, the Core3 also offers you the ability to track projects and time spent on those projects. Other features include management and employee dashboards, reports, integration with Outlook, QuickBooks, Apple's Address Book, iCal and credit card processing and if that isn't enough, the system can be 100% customized to fit your specific needs.

Built using the award winning FileMaker Pro cross-platform database engine, Core3 is also one of the few CRM solutions that will work on both Apple and Windows computers so that everyone in your organization can access a single solution no matter what platform they are using.

Customer Relationship Management:

- Specifically designed to handle both individuals and organizations and their relationship to each other. This cross-linking functionality allows you to see everyone that is associated with an organization and their roles. Easily view the associated Opportunities, Estimates, Orders, Invoices, Projects, Activities, Timers and Documents associated with any contact or organization.

Correspondence History and Campaigns:

- Have a complete correspondence history for every contact and every employee for all faxes, calls, letters, e-mails and notes from conversations. Use pre formatted templates for e-mails, letters and faxes. Send bulk HTML e-mail and mail merge letter campaigns.

Pricing



- Site License \$2,500
- Site + 1 FileMaker Pro License \$2,791.53
- Site + 5 FileMaker Pro Licenses + Maintenance \$3,889.38
- Site + 5 FileMaker Pro Licenses, FileMaker Server + Maintenance \$4,692.78
- Site + 10 FileMaker Pro Licenses, FileMaker Server + Maintenance \$6,082.15
- Installation Support \$499.00
- FileMaker Pro Single User \$291.53 (Pricing ONLY valid with purchase of Core3)

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Calendars and Activities:

- Create individual and overlapped group calendars quickly and easily. Display event data in traditional Day, Week and Month views, create individual or repeated events and link events to contact records.
- Assign activities such as meetings, phone calls and to-dos to individuals or groups. Activity alarms keep your staff on target with customer follow-up and deliverables.

Opportunities, Estimates, Orders and Invoices:

- This flexible module allows you to track your sales process from initial contact through to invoiced customer. Sales opportunities can be linked to individuals, companies or both. Quickly generate multiple related opportunities, estimates, orders and invoices from a single opportunity.

Payments:

- Create and track customer payments (supports multiple payments across multiple invoices). Automatically process credit cards using PayPal or Authorize.net with our FM Credit Card plug-in. Plug-in sold separately.

Items:

- Create and track all items (supports inventory, non-inventory, service and subtotal item types) including basic inventory tracking!

Project Management:

- Managers can easily setup projects, link individuals and contacts as well as define their roles. Create project items and track time against those items. Activities and calendar events can be linked to projects to provide a full history for managers to view and assess productivity.

Stage Progression and Tracking:

- Track the stage and number of days open for all opportunities, estimates, orders, invoices or projects. Filter records and see all related activities allowing for proper forecasting.

Dashboard:

- Track the stage and number of days open for all opportunities, estimates, orders, invoices or projects. Filter records and see all related activities allowing for proper forecasting.

Reporting:

- Copy the dashboard charts and graphs for a presentation or choose from an array of pre-formatted reports to communicate information to your teams.

Document Management and Storage:

- Have a centralized repository for your documents so anyone can see and access any documents associated with a respective contact. Document security allows staff to check documents in and out allowing for only one person to edit them at a time.

Data Exchange:

- The Core3 is preprogrammed to exchange data with Microsoft® Outlook, QuickBooks®, Apple's® Address Book and iCal. Plug-ins sold separately.

Windows Data Exchange and Mobile Access:

- With the use of our Outlook Manipulator plug-in you can push and pull contacts, tasks, events and mail items between the Core3 and Microsoft Outlook allowing you to have your data in your handheld device such as iPhone, Droid, or Blackberry. With the use of the FMBooks Connector plug-in you can push and pull customers, invoices and payments to and from QuickBooks. Plug-ins sold separately.

Mac Data Exchange and Mobile Access:

- With the use of the Outlook Manipulator for Mac plug-in you can push and pull contacts, tasks, events and mail items between the Core3 and Microsoft Outlook. With the use of our Address Book Manipulator plug-in you can push and pull contacts between the Core3 and Apple's Address Book. With the use of our iCal Manipulator you can push events and tasks to iCal. These powerful integrations allow you to have your data in your handheld device such as iPhone, Droid, or Blackberry. Plug-ins sold separately.

Stage Progression and Tracking:

- Unlike other software products, the Core3 is sold fully unlocked and built on FileMaker Pro. This enables you to customize and expand any feature or module within the Core3 using either Productive Computing's custom development services or using a different FileMaker developer of your choosing. With Core3 your organization will have a solution that can grow and change as the workflow and business demands change.

