



Stengthen
Your Core
with Ours



Core4 is an easy to use business information tool that serves as the central nervous system (the Core) for every business it is used in.



Get Organized
and get a Handle
on your Business

Sick and Tired of not being organized and finding it difficult to get a handle on your business?



Keep Up
with your
Competition

Fearful of being left behind by the competition?



Be Confident
in your System

Worried that your current systems and processes establish little accountability, lack security, and make it difficult to train new staff?

Core4 if Ideal for:

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

Product Tutorial Videos:

The [Core4 Video Library](#) offers a wide assortment of videos to assist you with the basic installation, usability and functionality of our products.

Product Demos & Questions:

Core4 demos are available upon request. Please e-mail your request or questions to sales@productivecomputing.com or call at 760-510-1200.

Product Forum:

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

System Requirments:

(System requirements are subject to change without notice. Please consult the web site for the latest information.)

- Windows 7/8/10
- macOS 10.11 - 10.12
- FileMaker® Pro 16
FileMaker Pro 16 is included with Core4 subscription packages
- Plug-in specs may vary
- iPad connectivity available via the FileMaker Go app
- Browser connectivity available via FileMaker WebDirect on Safari 6.1-8 and Internet Explorer 10-11

Core4 Features and Modules



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.



Sales 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.

Purchase Orders

Track all data for your P.O. process (vendors, customer, items, status, etc.)

Inventory Management

Create and track inventory, including items, sub-items, reorder levels, quantity on hand, etc. Supports kits and inventory assemblies.

Invoicing and Payment Tracking

Generate and send invoices; receive and track payments, including multiple payments across multiple invoices. Optionally interface invoice data with QuickBooks using our FM Books Connector.



Communication History and Campaign Management

Track every contact with your opportunities, customers, and employees: phone calls, emails, and meeting notes. Easily send email marketing campaigns using our Outlook Manipulator.

Document Management

Secure document storage and checkout management mean everyone has access to the information they need and no one can overwrite another user's updates.



Calendars and Activities

Individual and overlapped group calendars provide insight into one-off and repeating events or meetings. Easily assign to individuals or groups with at-a-glance status view and automated reminders to keep everyone on track.

Project and Task Management with Time Tracking

Our CRM project management module allows you to define projects, tasks and roles; easily assign tasks to individuals or groups; and track time against projects for internal reports or client invoicing.

Work Orders

Create and dispatch work orders to field technicians' iPads; completed work is signed off electronically on-site. No more tracking paper documents and deciphering illegible handwriting.



Dashboard

Key performance indicators and graphs viewed at-a-glance for opportunities, estimates, orders, and invoices.

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.



Data Exchange

Depending on your needs, the Core4 CRM seamlessly exchanges information with Microsoft® Outlook for Windows, Intuit® QuickBooks desktop for Windows, Apple® Calendar, and Apple Address Book.



Web Access, iPad and WAN Optimized

Conveniently access Core4 from any computer with a web browser with FileMaker WebDirect. This solution has been optimized to run on the free FileMaker® Go app for iPad with additional functionality added for technicians who fulfill work orders in the field. Access your data more efficiently with increased speed across your Wide Area Network.

Multi-Platform Support

Whether you need PC or Mac CRM software, Core4 works seamlessly in all platforms, including iPads for technicians and project teams or sales reps at remote locations.

Customize and Expand

Using Productive Computing's development services, you can customize and expand modules and features within the Core4 user interface to adjust and adapt to workflow and project demands.