Core² Invoices

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 Invoices $499.95

Core² Invoices 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 for through 11 for Invoice Module

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.

A complete invoicing and payment module that can be added on to any FileMaker® Pro database system or purchased with the Core² CRM solution.

It is completely preprogrammed to be tightly integrated with QuickBooks® using our FM Books Connector plug-in. Plus since this module is 100% customizable you can modify it to fit your specific business needs.

Invoices:
Create and track customer invoices, as well as send invoices via mail, e-mail or print to PDF. (supports unlimited invoice line items and invoice pages).

Payments:
Create and track customer payment history (supports multiple payments across multiple invoices).

Reporting: Includes aging reports, sales reports, customer balance reports and graphs.

Optional integration with QuickBooks® will provide:

The easy push button maintenance process assists you in importing and refreshing your customer list, invoice history, payment history, chart of accounts, payment methods, sales reps, payment terms, shipping methods, customer messages, and invoice items.

Smart QuickBooks logic identifies which transactions are already in QuickBooks vs. ones that are not. By integrating with QuickBooks you can greatly reduce processing time and eliminate double entry. Please note integration with QuickBooks is available only on the Windows platform.
Easy, one button "push to QuickBooks" for invoices and payments.

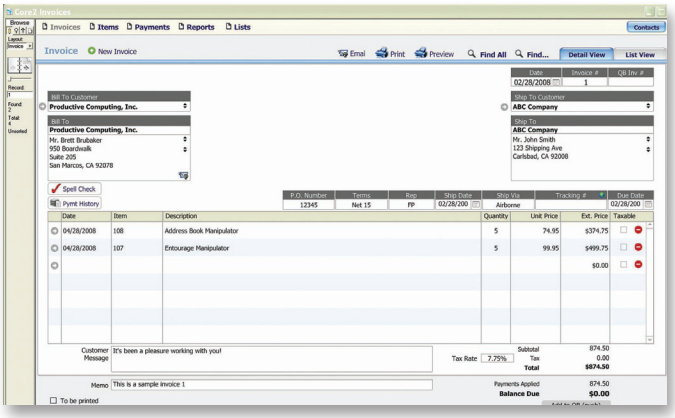
"View in QB" buttons distributed throughout Invoices module for viewing of invoices, payments, customers, and items within QuickBooks.

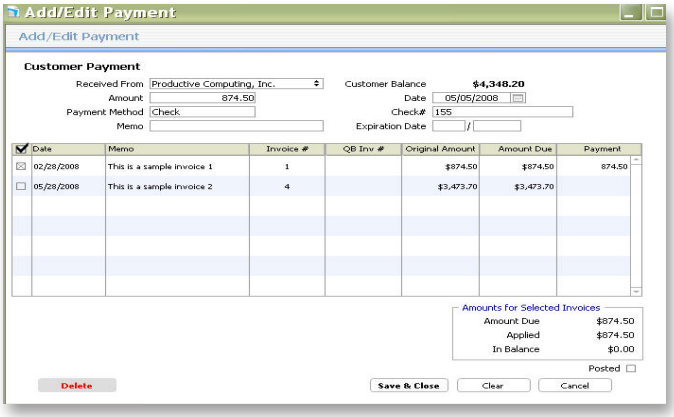
Why Core² Invoices?

Customer Invoices and Payments:

Easily tracks customer invoice and payment history and is completely integrated with QuickBooks.

- Create and track customer invoices.
- Send invoices via mail, e-mail or print to PDF.
- Create and track customer payment history (supports multiple payments across multiple invoices)





Reporting:

Quickly create reports with graphics from Core² without having to open your QuickBooks file including:

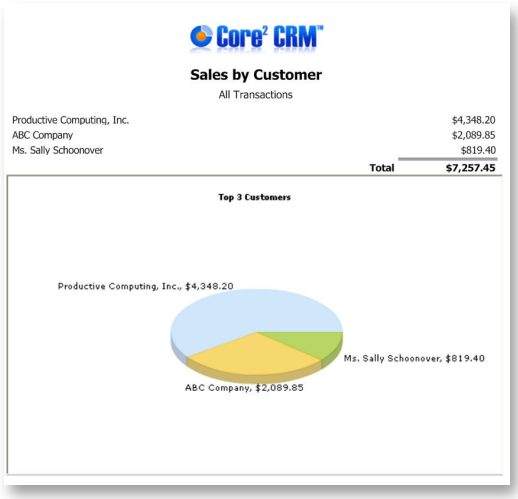
- Customers and Receivables aging summary and detail
- Sales Graph by Item
- Sales Graph by Sales Rep
- Customer Balance Detail
- Sales Graph by Customer
- Customer Sales by Month

Core² CRM

Custom Balance Detail

All Transactions

Date	Inv #	QB Inv #	PO #	Amount	Open Balance
ABC Company					
3/29/2008	2		7050803	$2,089.85	$2,089.85
Total ABC Company				$2,089.85	$2,089.85
Ms. Sally Schoonover					
4/28/2008	3			$819.40	$819.40
Total Ms. Sally Schoonover				$819.40	$819.40
Productive Computing, Inc.					
2/28/2008	1		12345	$874.50	
5/28/2008	4			$3,473.70	$3,473.70
Total Productive Computing, Inc.				$4,348.20	$3,473.70
Total				**$7,257.45**	**$6,382.95**



Core² CRM

Sales by Customer

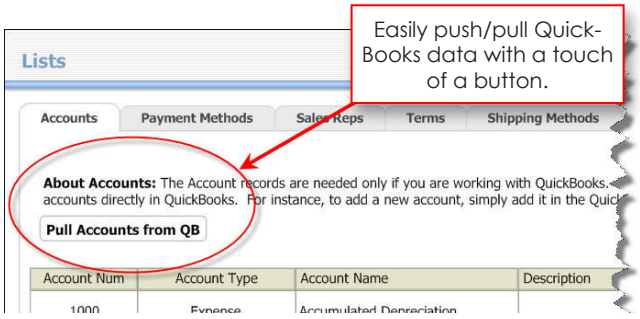
All Transactions

Productive Computing, Inc.	$4,348.20
ABC Company	$2,089.85
Ms. Sally Schoonover	$819.40
Total	**$7,257.45**

Top 3 Customers

Integration with QuickBooks:

The Core² Invoices module has been pre-programmed to be tightly integrated with QuickBooks using the FM Books Connector plug-in. After purchase and installation you can utilize the List Menu options to pull details from QuickBooks into the Core² Invoices. Should you need assistance with the setup or you want more items from QuickBooks then contact us or fill out a Request for Quote.



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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. 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.

Productive Computing

Creating Efficiency Through Automation

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.

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 or call 760-510-1200.

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Terms and Conditions:
These terms and conditions, as amended from time to time, govern the use of the Core² CRM or Core² 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 Core² CRM and Core² Invoice modules: installation, basic usability, and basic functionality, as described in Core² CRM and Core² 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.