Productive Computing

Quick Start Guide For The

Core² CRM™

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I. Introduction

Purpose:

The purpose of the Core² CRM Quick Start Guide is to provide you with the "out of the box" set up and features of the Core² CRM. A series of training videos that go over the features and functions of Core² CRM can be viewed at www.core2crm.com . The Core² CRM can be used "as is" or can be customized to fit your specific needs.

Your need for assistance is going to be directly related to how much experience you have with FileMaker Pro. This document assumes that you have a basic knowledge of FileMaker Pro and that you have already installed FileMaker Pro and FileMaker Server (if applicable). Productive Computing does provide user and developer training sessions. If you have additional questions about any features, customization options, training sessions or FileMaker set up, please contact us at sales@productivecomputing.com .

Demo vs. Purchased Version:

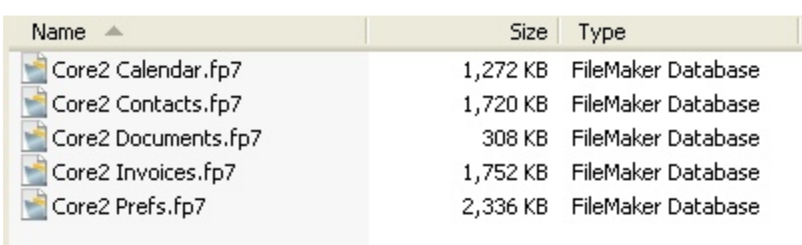
The demo allows you a limited number of records. FileMaker is not required to open and use the demo as the demo is in a runtime. This enables all users to demo the Core² CRM regardless if FileMaker is installed on their machine. The data you create within the demo will not be preserved when you upgrade to a full version of this product.

The purchased version comes to you fully unlocked and ready for use. FileMaker is required in order to open and use the full purchased version. The purchased version contains various files depending on your order. Files in your package may vary. Please note that these files are interconnected and should not be separated or renamed without the proper developer tools. The developer tools are available with FileMaker Pro Advanced.

<u>Core² CRM consists of the following files:</u>
Core2 Contacts.fp7*
Core2 Calendar.fp7
Core2 Documents.fp7
Core2 Preferences.fp7

<u>Core² CRM with Invoices consists of the following files:</u>
Core2 Contacts.fp7*
Core2 Calendar.fp7
Core2 Documents.fp7
Core2 Preferences.fp7
Core2 Invoices.fp7

Figure 1.0 – Example of Core² CRM with Invoices files



Name	Size	Type
Core2 Calendar.fp7	1,272 KB	FileMaker Database
Core2 Contacts.fp7	1,720 KB	FileMaker Database
Core2 Documents.fp7	308 KB	FileMaker Database
Core2 Invoices.fp7	1,752 KB	FileMaker Database
Core2 Prefs.fp7	2,336 KB	FileMaker Database

* denotes primary file

II. Getting Started

Using the Core² CRM involve the following steps.

1) Install FileMaker Software and Host Core Files

In order to properly run the Core² CRM, each user will need the FileMaker program on their machine. If more than one person is going to use the Core² CRM simultaneously, it is strongly recommended that you acquire and install FileMaker Server software and properly "host" the file within your environment. The FileMaker Server software can help you improve the security, availability and performance of your Filemaker Pro databases.

We also strongly recommend that you use FileMaker Pro Advanced when customizing the Core² CRM. FileMaker Pro Advanced includes all the abilities of FileMaker Pro plus a suite of advanced development and customization tools.

Please visit www.filemaker.com to learn more about the benefits of using FileMaker Server and FileMaker Pro Advanced. When you are ready to purchase your FileMaker licenses, please contact Productive Computing for a competitive price quote.

Single User (Requires FileMaker Pro software)

If there is only going to be one user of the Core² CRM, you need to make sure ALL Core² CRM FileMaker files are in the same folder. Please open the solution by double clicking the "Core2 Contacts.fp7" file first. This is primary file and the best file to use when opening the system. For example, if you open the "Core2 Documents.fp7" file first, the Core² CRM will not initialize properly.

Multiple Users (Requires FileMaker Pro and optional FileMaker Server Software)

If there is going to be more than one person using the Core² CRM, it is best to use FileMaker Server. Once you have moved and hosted the Core files in FileMaker Server, then only the "Core2 Contacts" file is displayed as this file is the primary file.

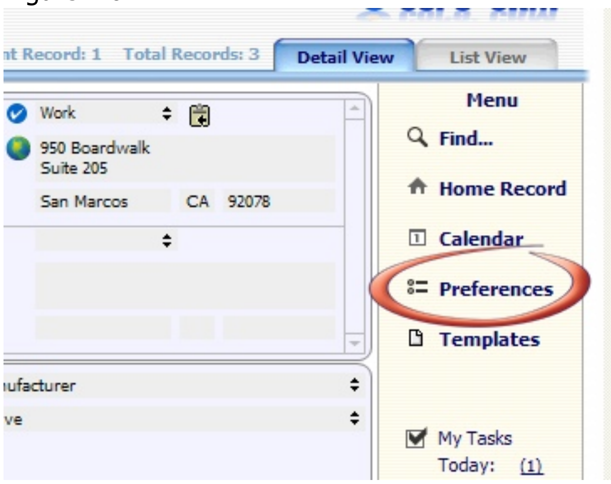
FileMaker openers can also be created in order to provide a "quick launch" to open the Core. Productive Computing can assist with creating openers. Please contact us at sales@productivecomputing.com for more information.

Note: The proper installation and configuration of FileMaker Server is beyond the scope of this document. Go to www.filemaker.com for more information on the proper installation and configuration of FileMaker Server software or contact us for a configuration estimate.

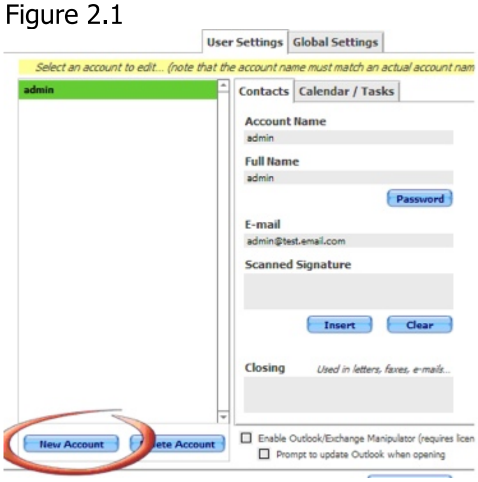
2) Set up Core User Preferences, Accounts and Security

The Core² CRM uses a dedicated record to maintain the preferences of the Core² CRM for each user. In order for the preferences for each user to work properly, it is necessary to have one corresponding FileMaker account for each user record in each Core² CRM file. This is done for you automatically when you create a new user in the Core² CRM from the preferences area.

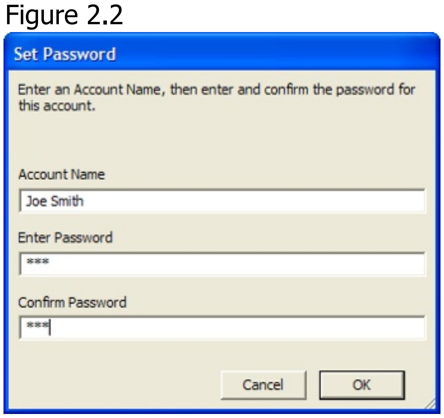
To create a new user simply follow these steps:
1) Select the "Preferences" button on the right side as shown in figure 2.0
Figure 2.0



2) Select the "New Account" button as shown in figure 2.1 New accounts cannot be created in the demo.
Figure 2.1

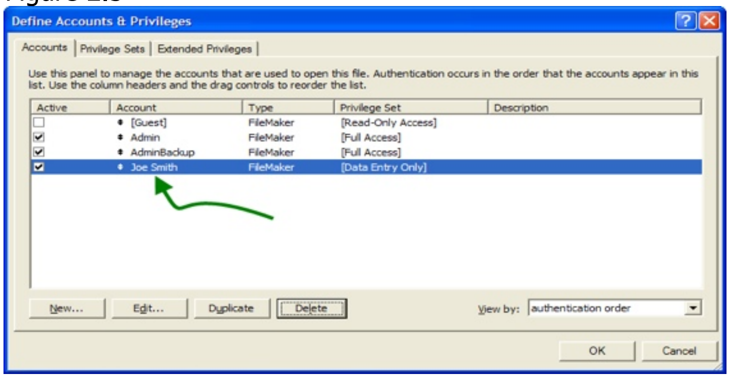


3) Enter the user account name, password and password confirmation as shown in figure 2.2
Figure 2.2



After creating a new account, the Core² CRM automatically creates a new FileMaker account in all other necessary Core² CRM files. Each new account is created with the built-in FileMaker "Data Entry Only" privilege set as shown in figure 2.3.

Figure 2.3



The Core² CRM comes programmed with the following three privilege sets:
- Data Entry Only
- Full Access
- Read-Only Access

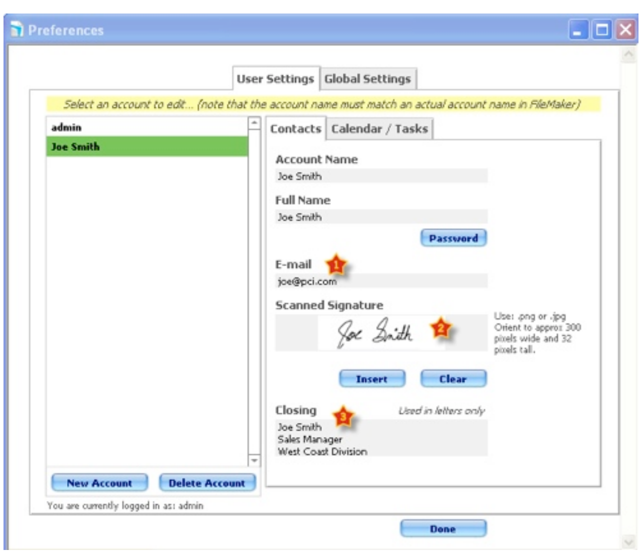
TIP: If you need to setup additional security options, you can create your own custom privilege set by referring to the FileMaker built-in help or by contacting a FileMaker developer. If you need to add or edit a privilege set or a specific user account privilege, then this needs to be done manually in EACH Core² CRM file using FileMaker's "Accounts & Privileges". However we recommend always using the preferences in the Core² CRM to create new users. Please only use FileMaker's "Accounts & Privileges" if you are an advanced user/developer and understand FileMaker accounts and privileges.

The Core² CRM comes with the following two "Full Access" admin accounts:
User = Admin and no password
User = AdminBackup, password = "we do not disclose"

The "AdminBackup" account was created as a back door to assist in the event that you loose your Admin account password. For additional security please change the passwords for these two accounts on ALL Core files and store all passwords in a safe location. Productive Computing assumes no liability or responsibility for lost passwords and issues associated with negligent security set up.

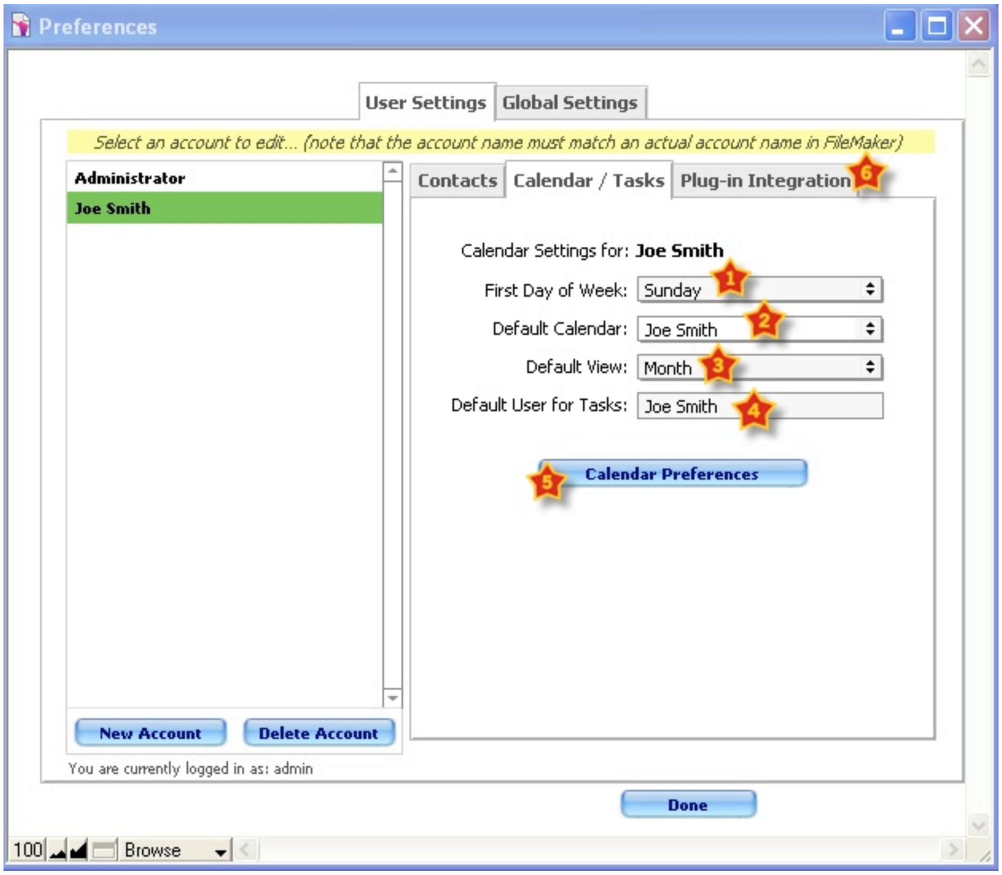
4) Next insert the account user's Email, Scanned Signature and Closing as shown in figure 2.4:

Figure 2.4



5) Navigate to the Calendar/Tasks tab as shown in figure 2.5 to set up the account user's calendar and task preferences.

Figure 2.5



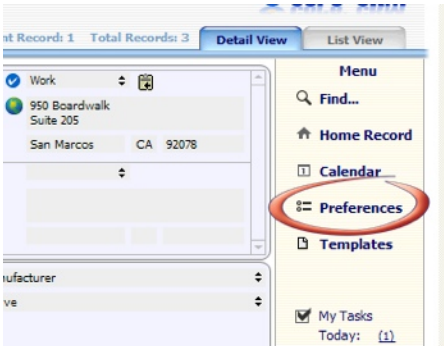
1. First Day of Week = Day of week the user Calendar will start typically either Sunday or Monday.
2. Default User Calendar = The calendar associated with the user. You will need to create each user calendar in the "Calendar Preferences" area.
3. Default View = Default calendar view such as Month, Week or Day.
4. Default User Tasks = The tasks associated with the user.
5. Calendar Preferences = Here you will create and manage all user and group calendars. Calendar names must be unique.
6. Plug-in Integration Tab = Applicable only if using the Outlook, Entourage, or iCal Manipulators. Please see Plug-in Integration section for further clarification.

Congratulations as you have now successfully created your user accounts for the Core² CRM!

3) Set up Core Global Preferences

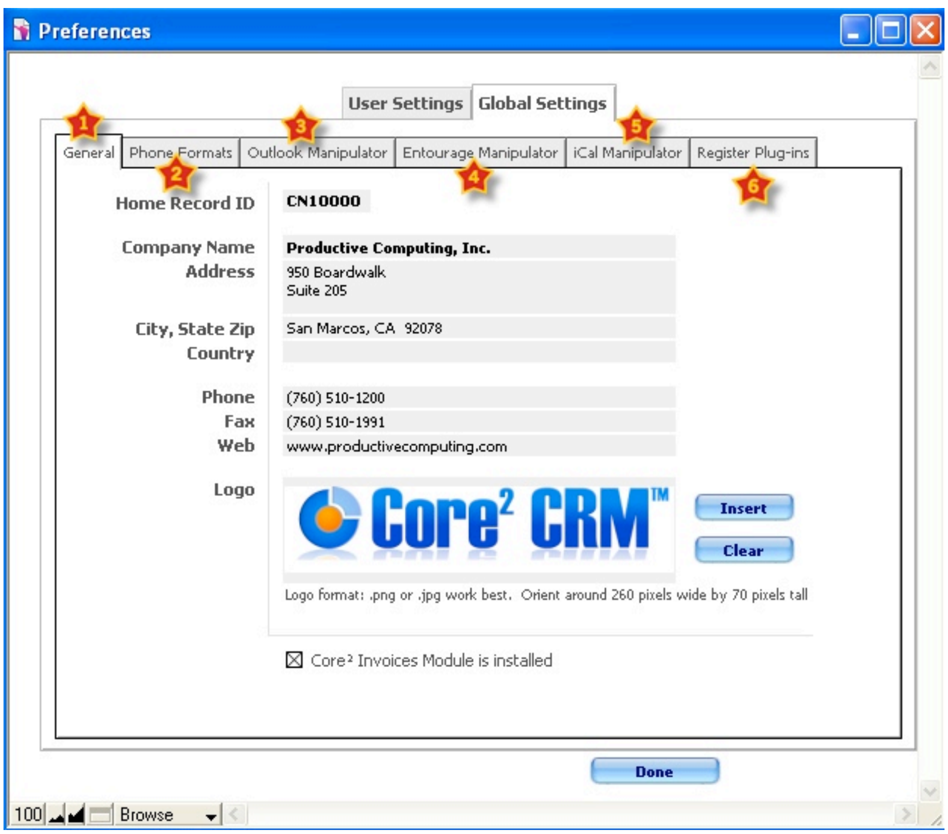
Next let's set up your Global Preferences by navigating to the Core Preferences as shown in figure 3.0.

Figure 3.0



Here you will find five tabs as shown in figure 3.1.

Figure 3.1



1. General = Here you specify your home record and upload your company logo.
The specified logo and contact information appear as the header on all letters and faxes. We recommend that you upload your logo offline before hosting the Core² CRM files.
2. Phone Formats = Optional area to specify international country phone formats.
3. Outlook Manipulator = Here you set up your Outlook Manipulator settings if applicable.
4. Entourage Manipulator = Here you set up your Entourage Manipulator settings if applicable.
5. iCal Manipulator = Here you set up your iCal Manipulator settings if applicable.
6. Register Plug-ins = Area where you register all manipulators/plug-ins if applicable.

4) Import Your Data

The Core² CRM is a built using a multi-table relational database structure. This essentially means that each major piece of data regarding your contact is stored in its own area or "table." Storing data like this in multiple tables give you great flexibility and expandability whereby you can have a single contact with multiple addresses, phone numbers and internet addresses. Because of this structure, it is not possible to use the traditional FileMaker "Import Records" script step to import your data unless you are familiar and with relationships, scripts and the act of importing into multiple related tables.

Fortunately, the Core² CRM comes with a special "Batch Contact Import" process that allows you to import your basic data by matching your fields with select fields in the Core² CRM. The routine will then move your data into all the necessary tables and properly link them. This basic "out of box" import functionality provides you with a starting point, however your data may be formatted in a more complex structure than this process supports. Productive Computing can be hired to assist you with your data import process if you need additional assistance.

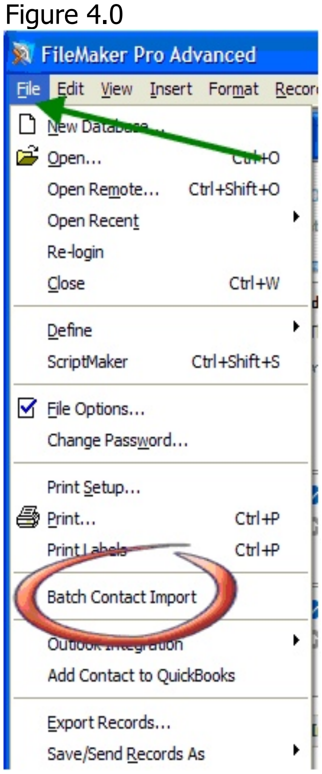
Please note that multiple batch imports are not supported with this process and should be done only at your own risk. We recommend performing the "Batch Contact Import" prior to using the Core² CRM as this import should be your starting point. If you have additional data files that need to be imported, then consolidate these data files into one master import file. Afterwards you can perform your "Batch Contact Import" using your single master import file. This is often the best method for basic users. However if you are an advanced user or you work with a developer then you may prefer to use the "Batch Contact Import" for more advanced data imports. All imports outside the standard use are supported by us under our paid support program.

The Import steps are as follows:

1) Start with a clean copy of the Core and delete all existing records.

2) Select "Batch Contact Import" from the File menu as shown in figure 4.0.

Figure 4.0

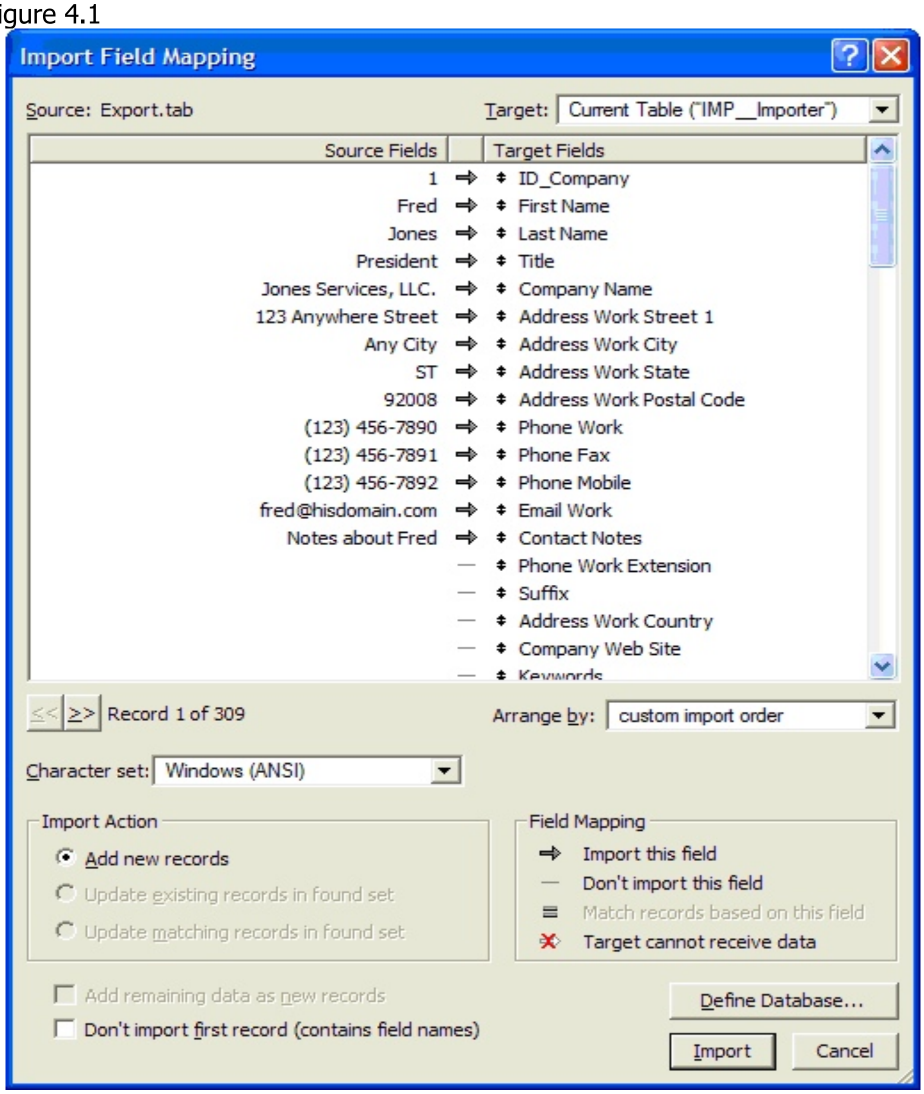


3) Select your data file. Supported data files are:
- FileMaker Files *.fp7
- Tab-Separated Text Files *.tab or *.txt
- Comma Separated Text Files *.csv or *.txt
- Merge Files *.mer
- Excel 95 - 2004 Workbooks *.xls
- Excel Workbooks *.xlsx
- other file types supported by FileMaker

Basically any file type that FileMaker supports can be imported. A complete list of file types is listed in FileMaker's help area.

4) Match your fields with fields in the Core² CRM as shown in figure 4.1. The fields from your data file (shown on the left side below) should be matched to the fields in the Core² CRM (shown on the right below). The "Arrange By" option in the lower corner can assist with arranging fields. The most common "Arrange By" selection is "Field Names" however please choose the option most appropriate for you. Fields are one to one. For example, one work phone and one note for one contact record. After matching the fields, select the "Import" button at the bottom to import your data into the Core² CRM.

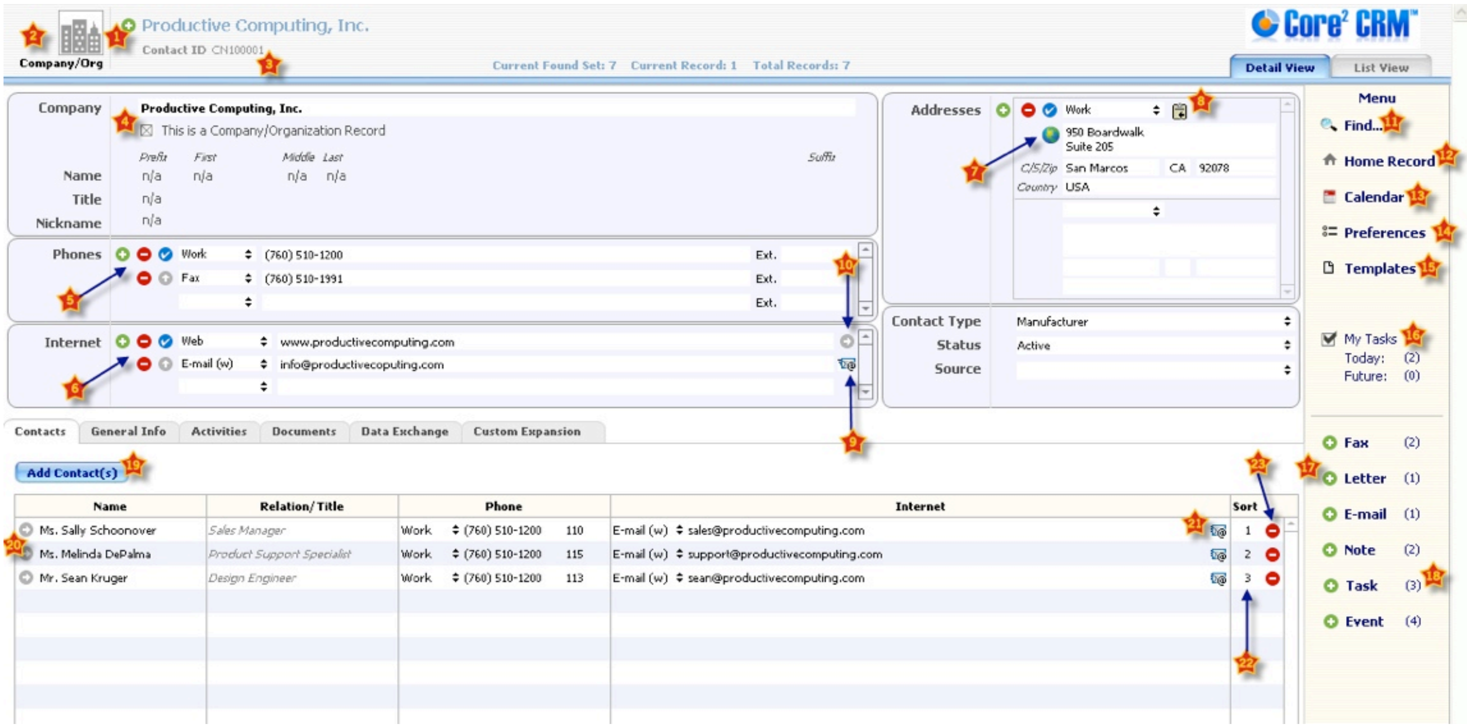
Figure 4.1



III. Basic Features and Functions

5) Contacts Overview

Figure 5.0 - Core² CRM Contacts Screen

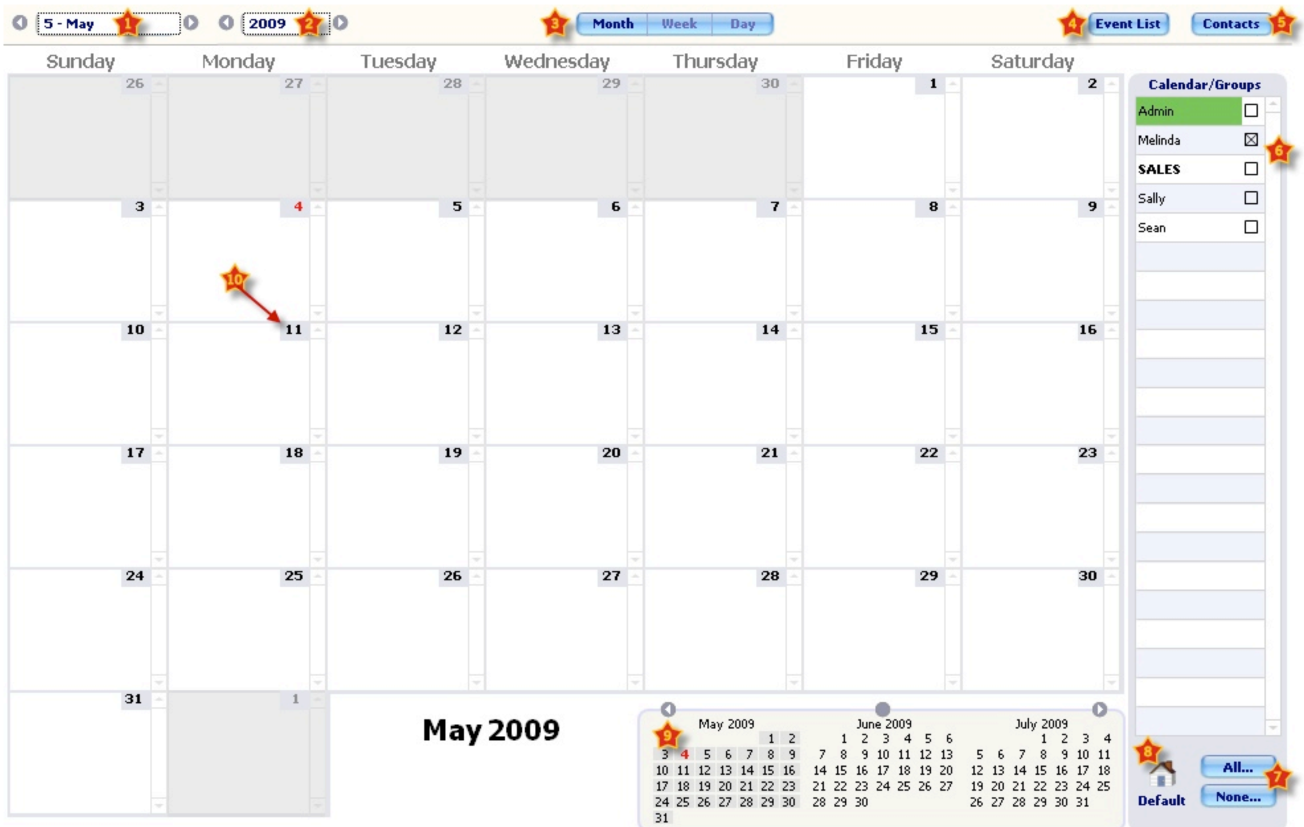


1. Add a new contact.
2. Icon and label indicates if the contact is either a company or an individual.
3. Contact ID: Unique ID that is incremented automatically with every new record.
4. Company/Organization Checkbox. Check if company or organization. Leave blank for individual.
5. Add, delete or promote a phone number. "Promoting" a number means moving it to the top slot in portal.
6. Add, delete or promote an internet address (similar to #5 above).
7. Map this address in Google Maps. Also allows you to map from one contact address to another (opens a separate web browser window).
8. Copy this address and name to the computer clipboard to paste it into another application.
9. Send email to this email address.
10. Open a new web browser window and go to this web address.
11. Find: Performs a find simultaneously in the following fields: company/organization, keywords, individual name, phone numbers, internet address, street addresses, and contact ID.
12. Home Record: This will find the home record. The home record can be setup in preferences area (see #14).
13. Calendar: Navigates to the calendar.
14. Preferences: Navigates to the Core preferences area. In the preferences area you can edit both the preferences for each user of the system as well as global settings that affect all users.
15. Templates: Navigates to the templates area where you can create "boilerplate" letters, faxes and email messages for use in mass mailings or for standard messages that are used repeatedly.
16. My Tasks/Task Manager: Navigates to an area where you can manage and overview all tasks for all users.
17. Create a new activity record such as a Fax, Letter, E-mail, Note, Task or Event.
18. Counts the number of activity records for the current contact.
19. Add/Link Contacts: Create, link or re-link contacts between company and individuals.
20. Go to Related Contact: Navigates to this contact record by selecting the arrow button.
21. Send email to this email address.
22. Sort contacts. Contact with #1 will appear at the top of the list in the portal.
23. Delete/Unlink Contacts: Delete or unlink contacts either company and individual contacts.

6) Calendar Overview

The Core² CRM comes complete with a Calendar specifically designed to handle individual and group calendars. You can manage calendars for employees, meeting rooms, equipment, or just about anything. You can overlap individual or group calendars to show availability or event density.

Figure 6.0 - Sample Calendar Month View



1. Navigate to different month.
2. Navigate to different year.
3. Change Calendar view to either Month, Week or Day view.
4. List view of all Calendar events.
5. Navigate back to main contacts page.
6. Select specific calendar or calendars. Selecting various calendars will display all events for each calendar selected. Group calendars are in upper case. For example the SALES group above.
7. Quick "All" and "None" buttons to select all or no calendars.
8. Quick "Home" button to select only the default user's calendar.
9. Quick buttons to easily change calendar months.
10. Add a new event for a specific day by selecting the corresponding numer.

Figure 6.1 - Sample Calendar Week View

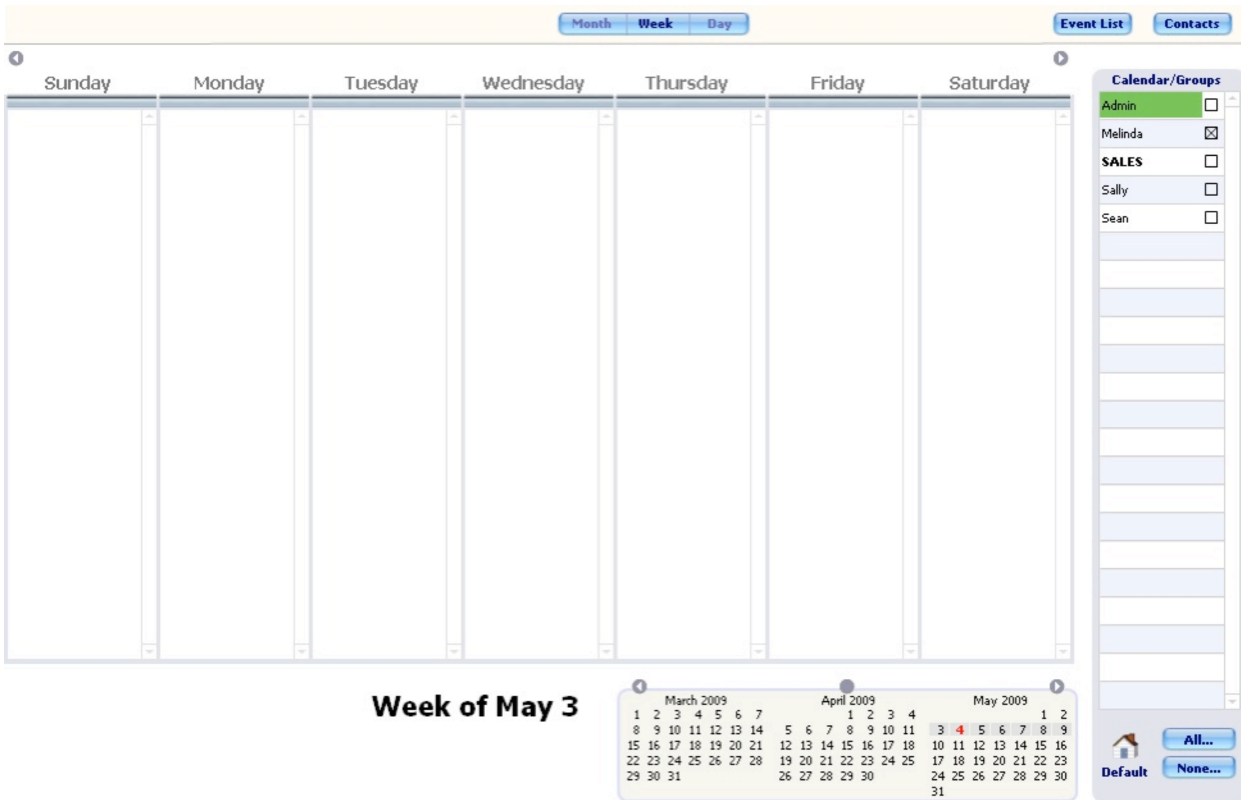
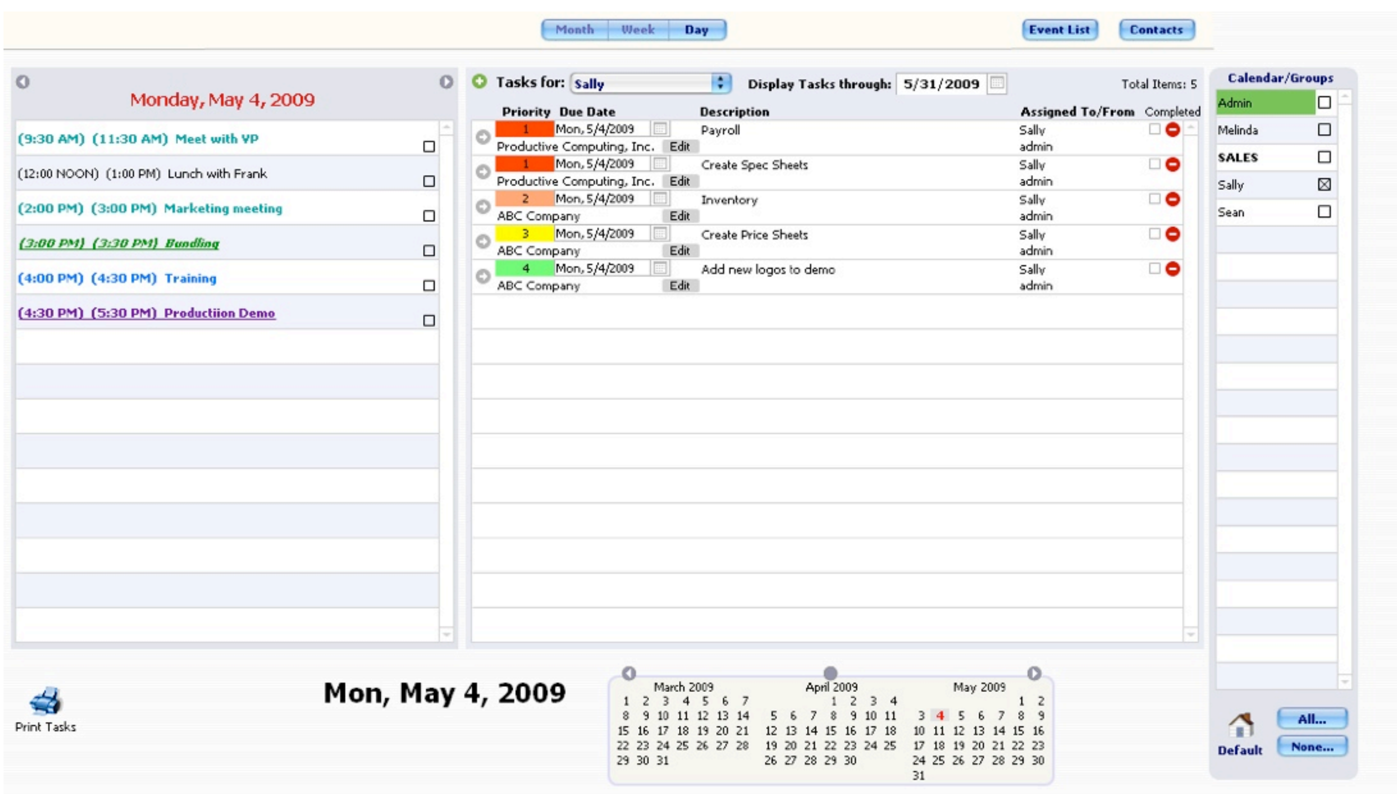


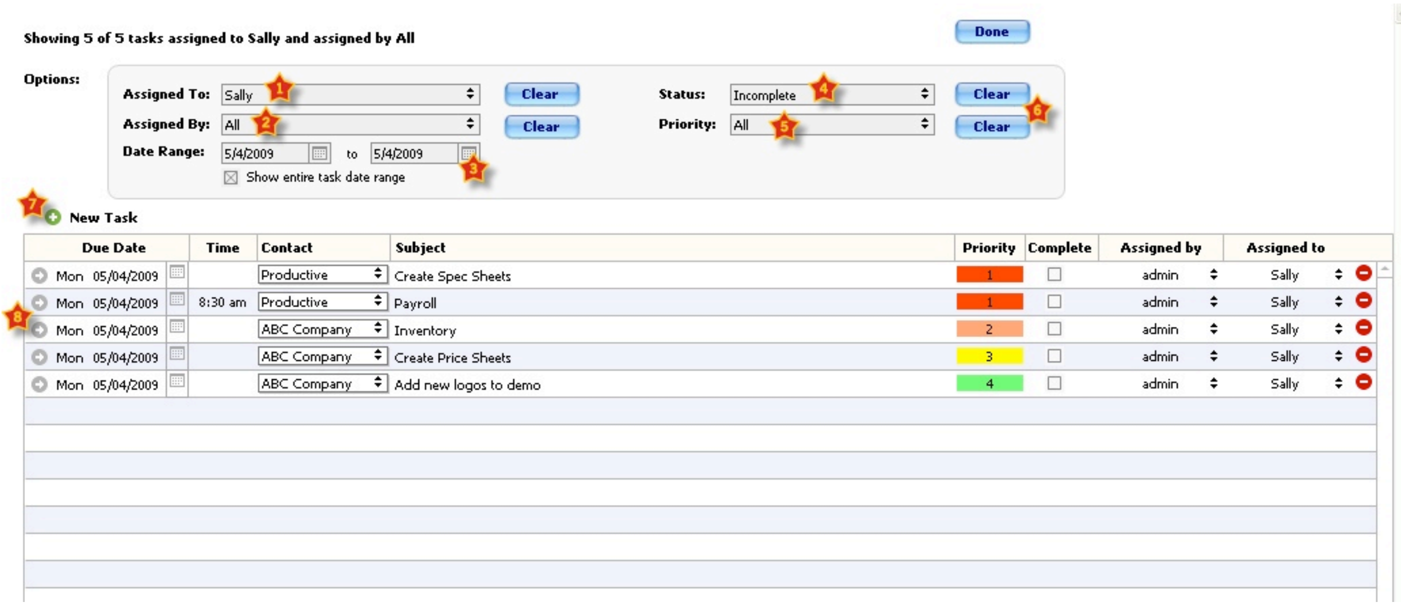
Figure 6.2 - Sample Calendar Day View
Please note that the day view also displays each corresponding user's tasks as shown below.



7) Task Management

The Core² CRM comes complete with Task Management. Manage tasks for yourself or others. Prioritize tasks by number and color, view all tasks for each employee or view all tasks for each client.

Figure 7.0 - Task Management View

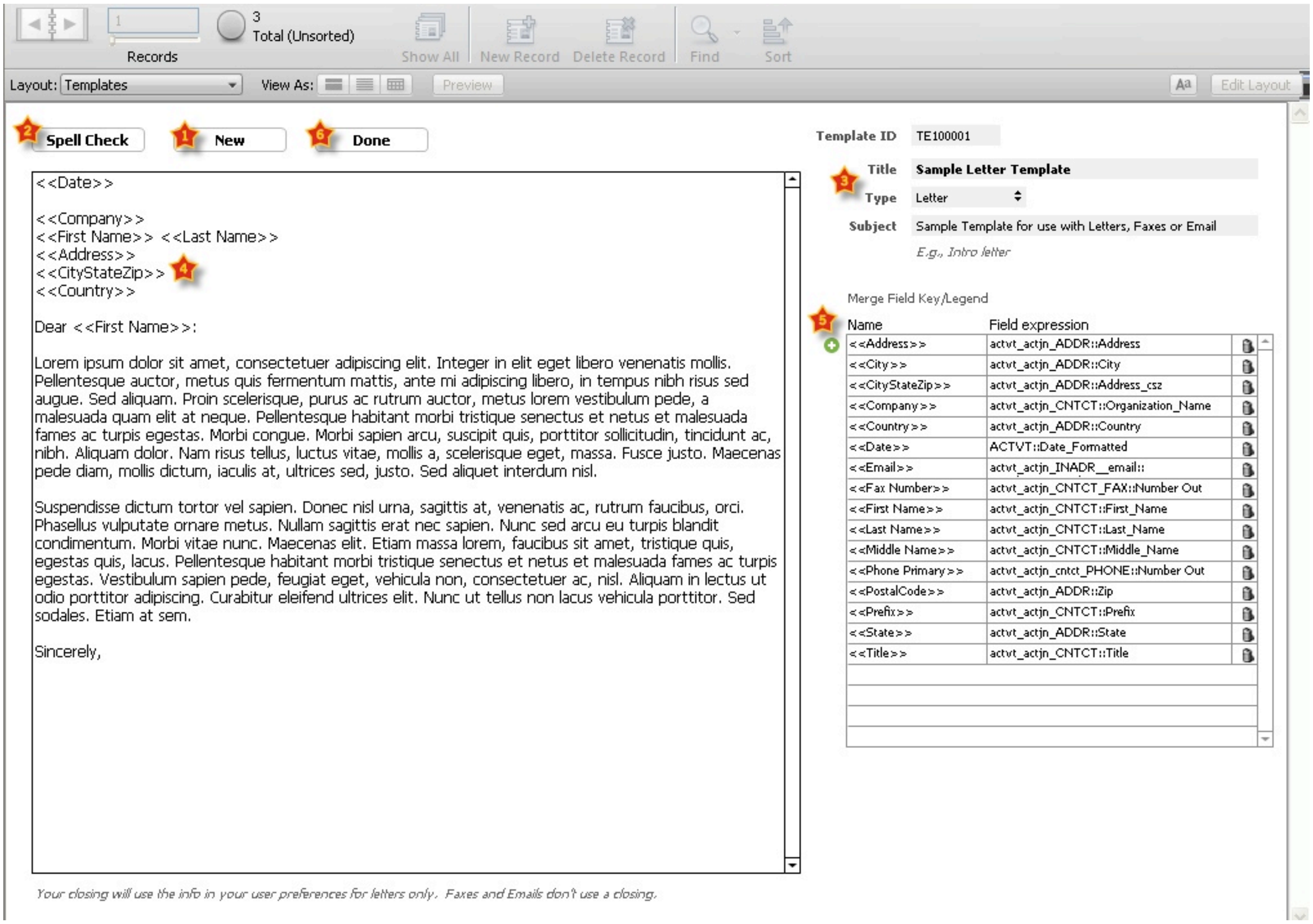


1. Select filter options and search for all tasks "Assigned To" the specified user.
2. Select filter options and search for all tasks "Assigned By" the specified user.
3. Select filter options and search for all tasks within the specified "Date Range"
4. Select filter options and search for all tasks with a specific "Status".
5. Select filter options and search for all tasks with a specific "Priority".
6. "Clear" or show all buttons.
7. Create a new task.
8. Navigate to the specific task details by selecting the arrow.

8) Templates

Create custom templates with merge fields specifically for use with emails, letters, or faxes.

Figure 8.0 - Sample Template Screen

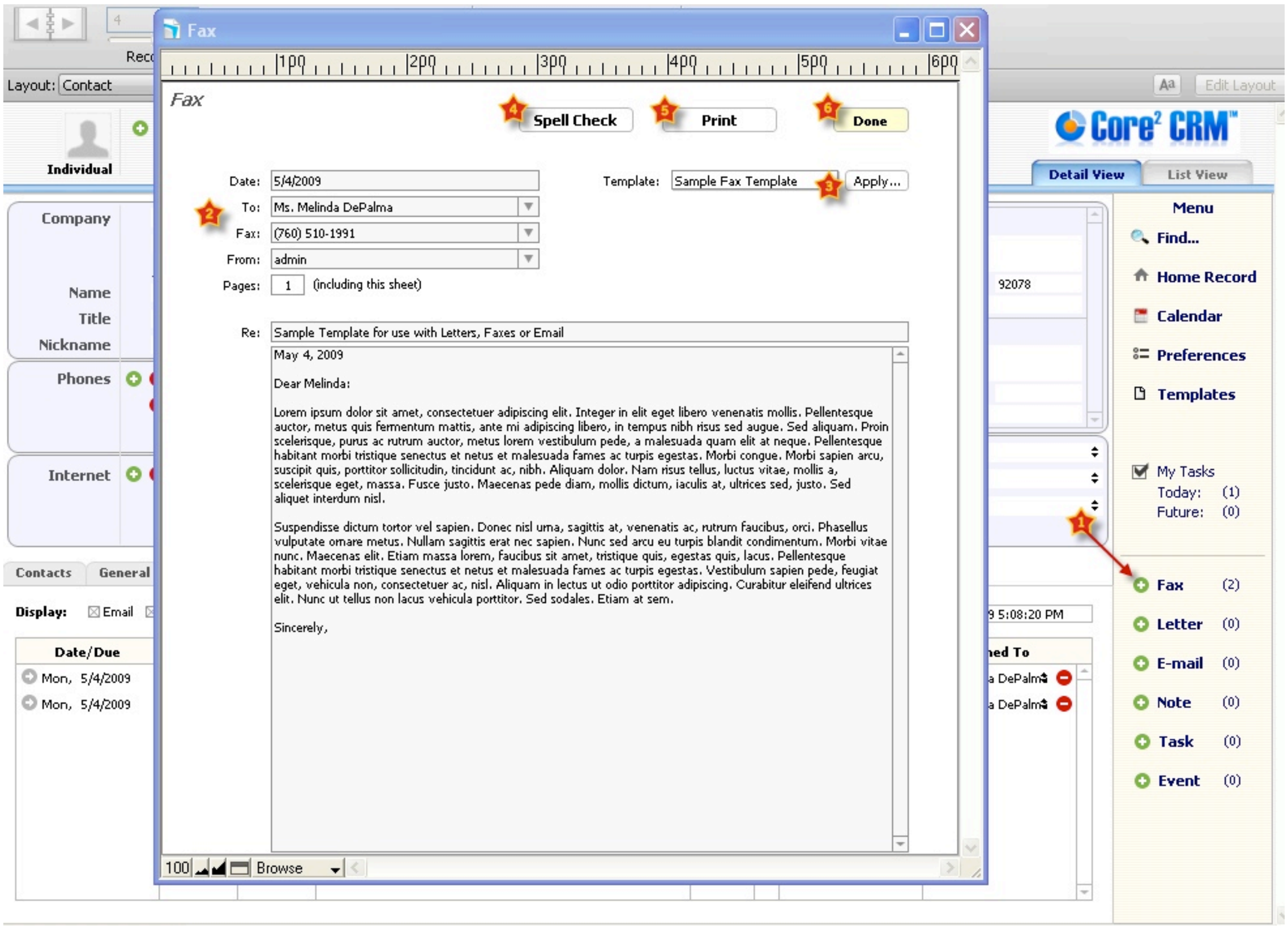


1. Create new template.
2. Perform Spell Check .
3. Specify the Title, Type and Subject of template.
4. Compose template and specify specific merge fields..
5. Add new merge field. This requires knowledge of the field expression and may require developer assistance.
6. Select done to close Template window.

9) Faxes

Manage and maintain a complete fax correspondence history for each contact.

Figure 9.0 - Sample Fax

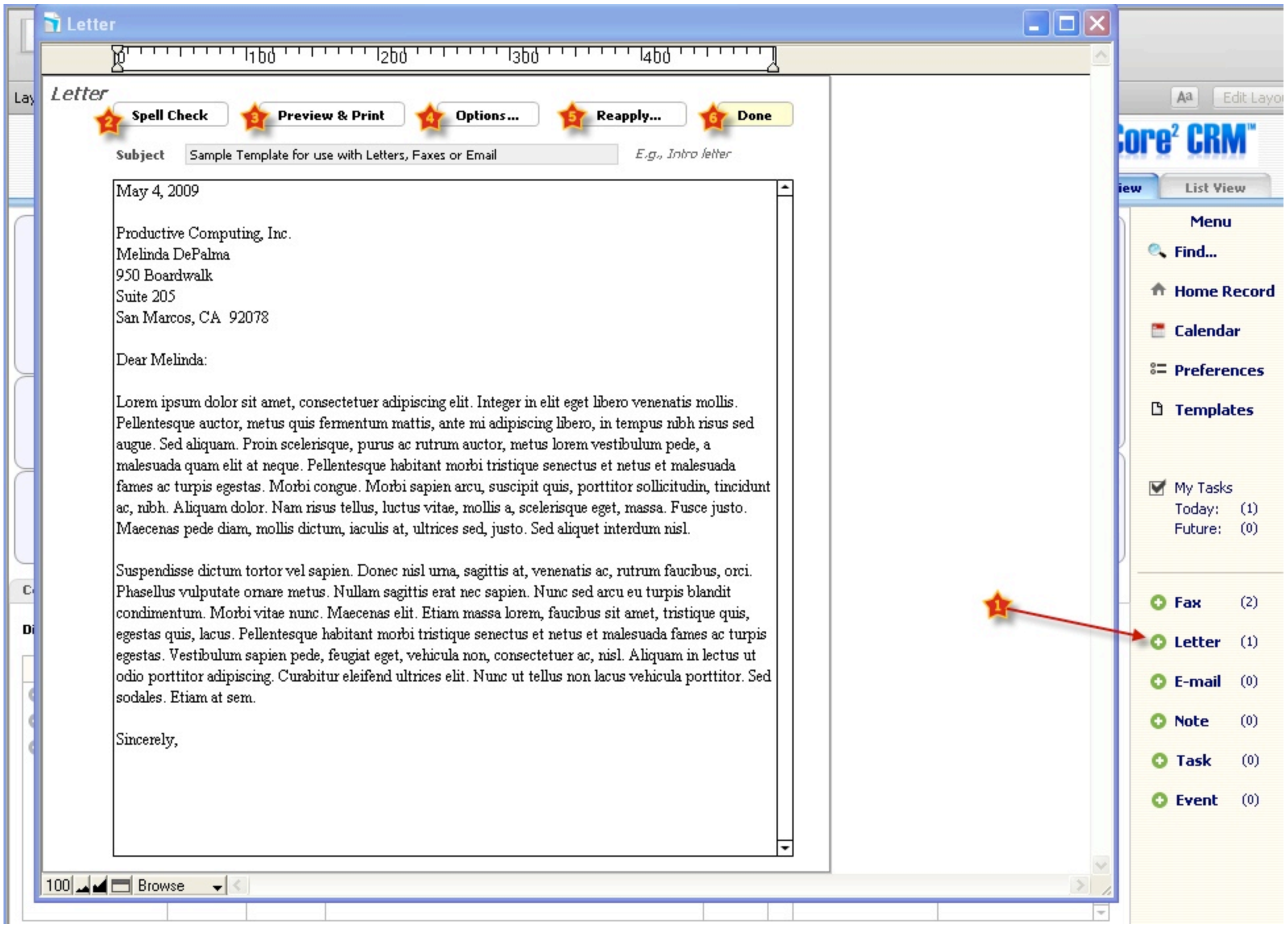


1. Create new fax for specified contact.
2. Enter Fax details. Please note that fax numbers are auto populated for the specified contact.
3. Option to apply a template.
4. Perform spell check.
5. Print fax or send fax using using electronic fax ability if configured.
6. Select done to exit fax details screen.

10) Letters and Labels

Manage and maintain a complete letter correspondence history for each contact. Create and track letter campaigns using mail merged templates. You also have the ability to print individual or company labels for each letter printed by selecting "Print Labels" from the FileMaker file menu. The default label is set to print to Avery 5160 label templates.

Figure 10.0 - Sample Letter

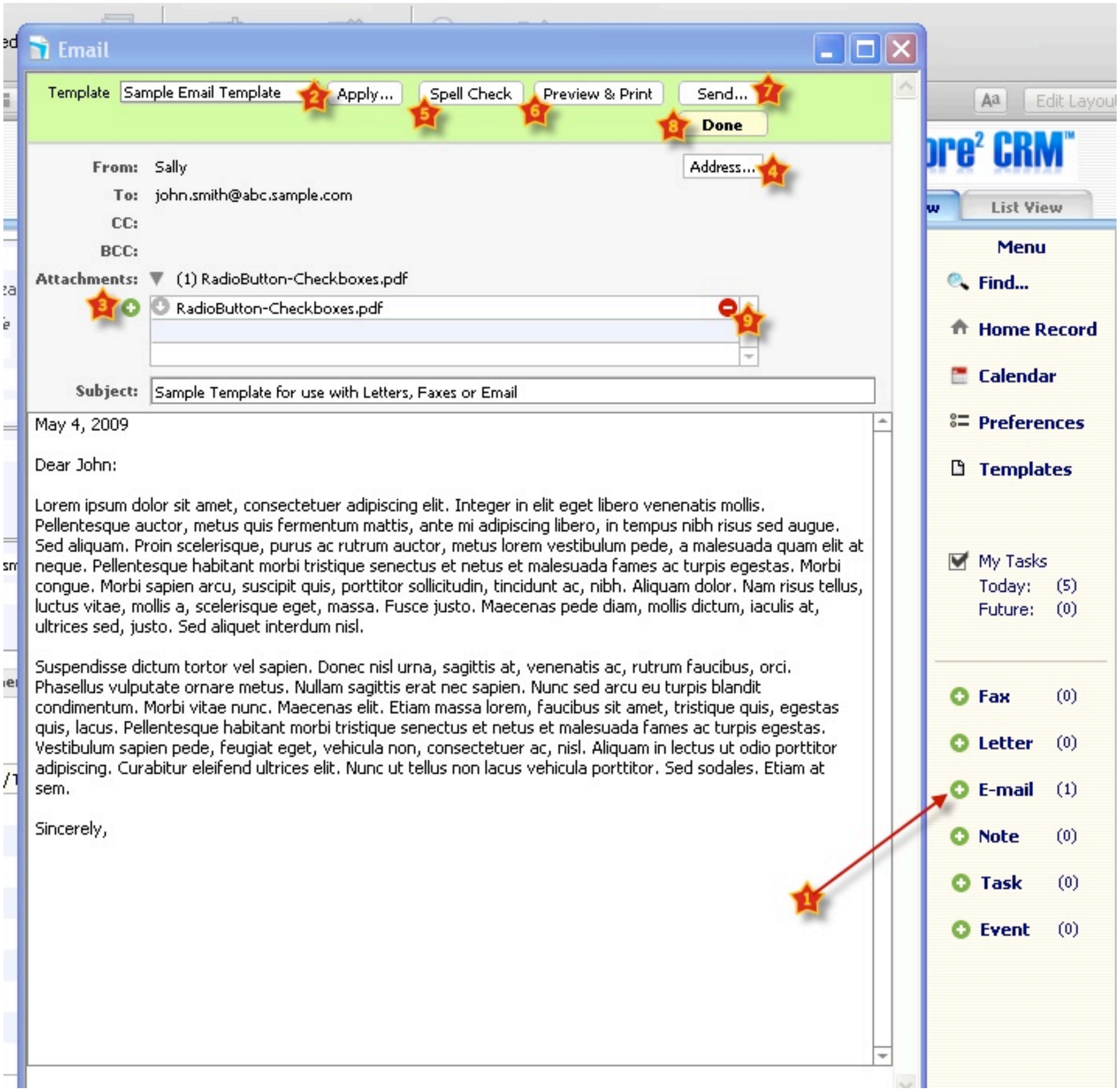


1. Create a new letter.
2. Perform spell check.
3. Preview and print letter.
4. Options to apply letter template and to send letter to an individual, mailing list or found set.
5. Reapply template if needed.
6. Select done to exit letter detail screen.

11) Emails

Manage and maintain a complete email correspondence history for each contact. Create and track email campaigns using mail merged templates.

Figure 11.0 - Sample Email

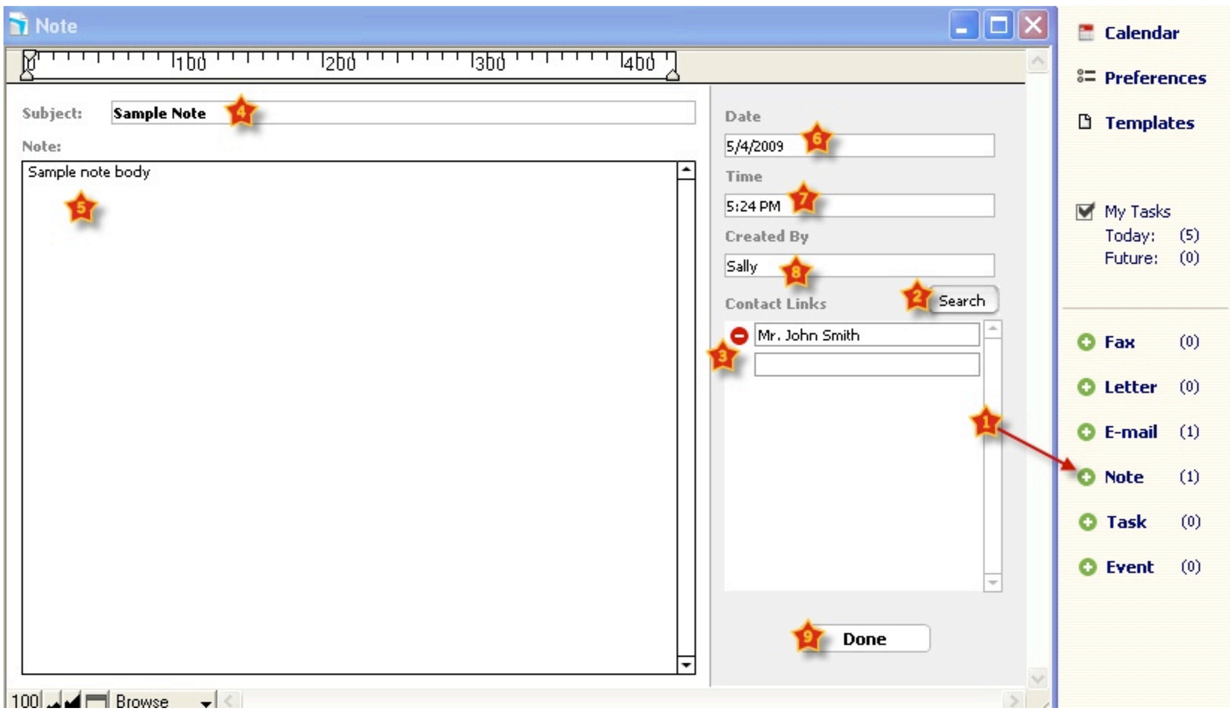


1. Create new email
2. Apply email template with merged fields.
3. Add various attachments.
4. Options to send email to an individual, mailing list or found set.
5. Perform spell check.
6. Preview and print email(s).
7. Send email(s).
8. Select done to exit email detail screen.
9. Delete or remove attachments.

12) Notes

Manage and maintain a complete note correspondence history for each contact.

Figure 12.0 - Sample Note

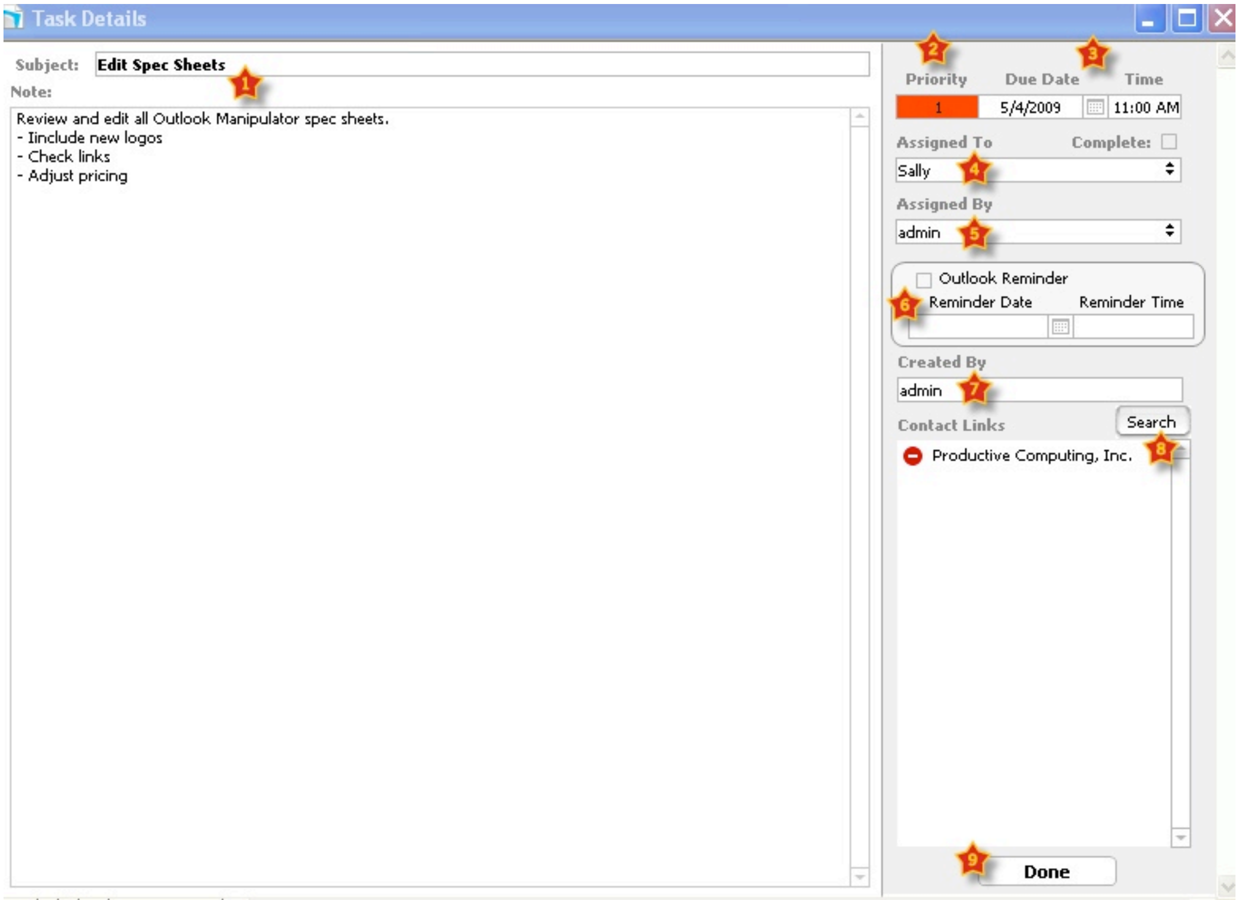


1. Create a new note.
2. Option to add note to an individual, mailing list or found set.
3. Option to delete or unlink note from specified contact.
4. Add note subject.
5. Add note body.
6. Assign date to note.
7. Assign time to note.
8. Track who created the note.

13) Tasks

Manage and maintain a complete task correspondence history for each contact.

Figure 13.0 - Sample Task

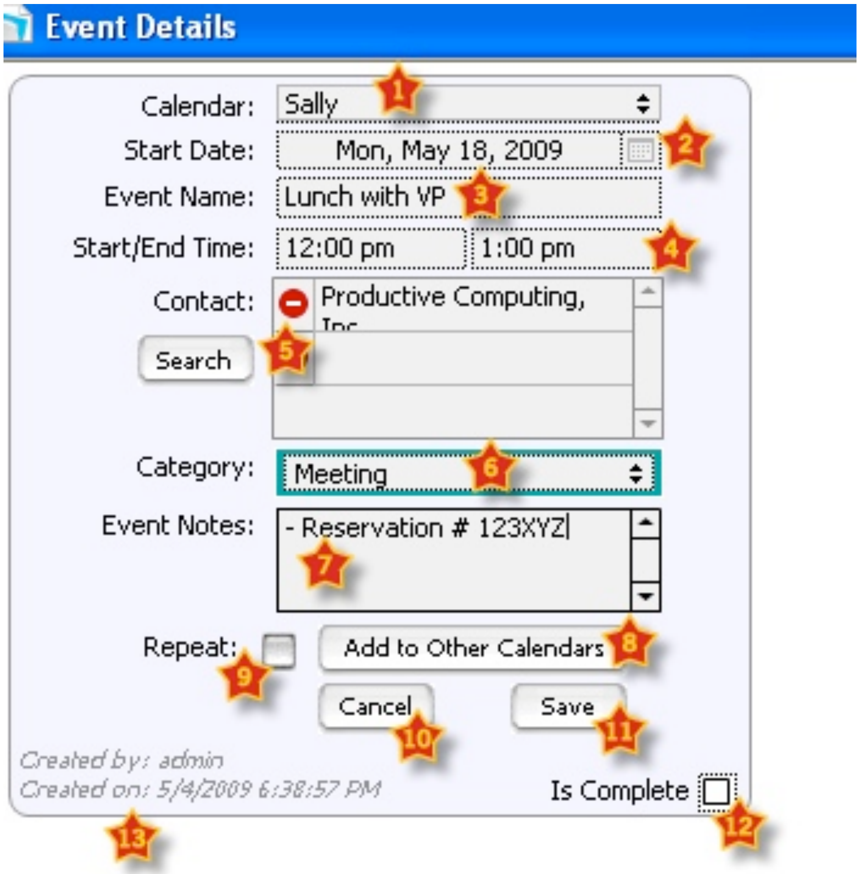


1. Add task subject and body.
2. Assign priority level to task.
3. Assign due date and time to task.
4. Assign task To specified user.
5. Assign task From specified user.
6. Set an Outlook reminder. This option is only applicable if using the Outlook Manipulator to push tasks to Outlook.
7. Track who originally created the task.
8. Options to add task to an individual, mailing list or found set.
9. Select done to exit task detail screen.

14) Events

Manage and maintain a complete event correspondence history for each contact.

Figure 14.0 - Sample Event

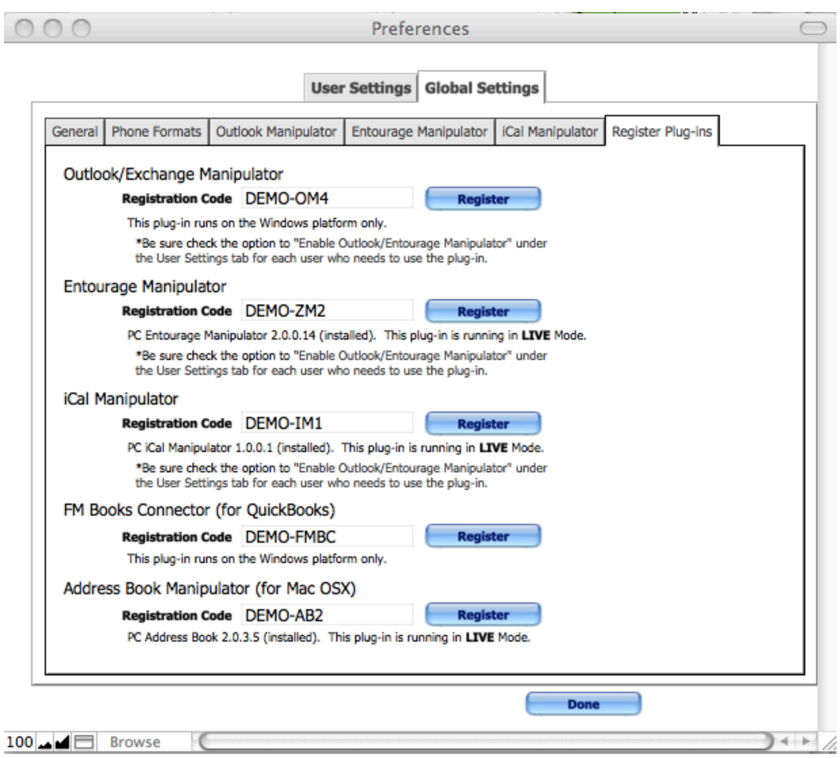


1. Assign event to specific calendar.
2. Set event start date.
3. Specify event name.
4. Set event start and end time.
5. Option to add or remove event associated to an individual, mailing list or found set.
6. Add event to specific category. Categories are created in the Core Preferences area.
7. Add event notes.
8. Add event to other calendars.
9. Set event specific repeat criteria.
10. Cancel event.
11. Save event record.
12. Mark event status as complete.
13. Automatic tracking of who originally created event and when the event was created.

IV. Plug-in Integration

The Core² CRM is specifically designed to exchange data with Microsoft Outlook® , Microsoft Entourage®, Apple's Address Book and Apple's iCal using our plug-ins. The Core² Invoices module is specifically designed to exchange data with QuickBooks® on Windows using our plug-in. The plug-ins are sold separately giving you the flexibility to pick and choose the right option for your users and environment. Exchanging data between FileMaker and your desired application eliminates double entry and allows you to have your data virtually anywhere you need it.

Before you begin working with any plug-in, please ensure that you register the plug-in. All plug-in registrations can be done by navigating to the Core Preferences > Global Settings > Register Plug-ins tab, entering your license ID in the corresponding Registration Code field and selecting the Register button as shown below. You can also register a demo by using the default demo registration codes. After registering a licensed plug-in, the plug-in should be running in LIVE mode.



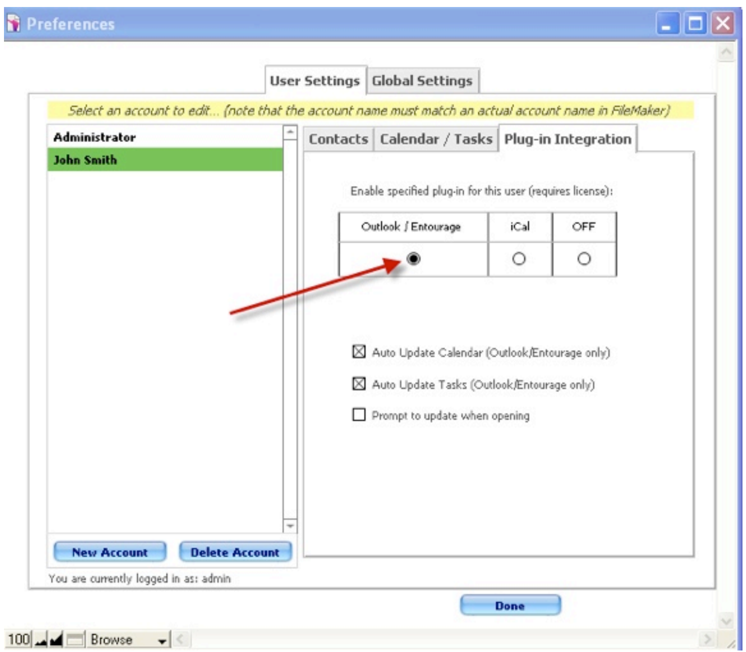
Next let's look at the "out of the box" functionality. The "out of the box" functionality are the most commonly used features, however, additional integration with these applications can be customized. Please contact us for a free estimate if you would like additional functionality.

15) Functionality with Outlook

The Core² CRM has the following “out of box” functionality with Outlook:

- Ability to send plain text formatted emails with multiple attachments without an Outlook security dialog.
- Ability to import Outlook email items with attachments into FileMaker. The email items are parsed into FileMaker and linked up to the corresponding contact based on the To, From and CC email addresses. You can choose to embed email attachments in FileMaker or store the attachments as a reference.
- Unidirectional data exchange from the Core to Outlook for all contacts, task and calendar items.
- Auto update feature from the Core to Outlook for all task and calendar items.

In order to take advantage of the Outlook data exchange, you will need to enable the plug-in for each user using the plug-in by selecting the radio box below found in Preferences > User Settings > Plug-in Integration.

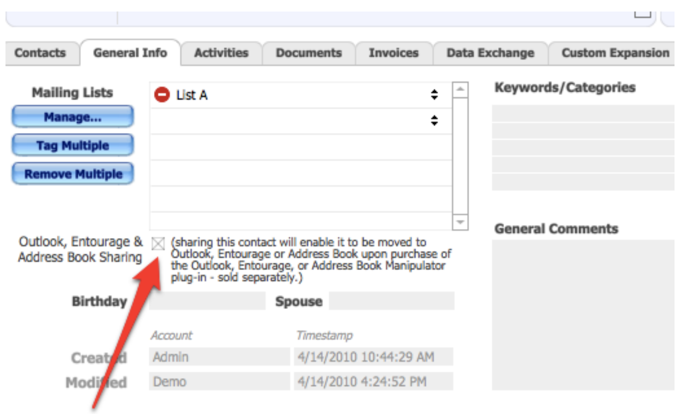


Once you have enabled the plug-in for a specific user, then that user can use the buttons shown below to exchange data for each area in Outlook. These buttons can be found on the Data Exchange tab in Core.

Let's look at the "out of box" functionality for each corresponding Outlook area when using the Outlook Manipulator with the Core:

Contacts

You can perform a unidirectional data exchange from the Core to Outlook for all contacts. All contacts pushed from the Core into Outlook are tagged in the Outlook category field as FMP. The next time you select the "Populate" button, a purge and push occurs. This means that all contacts records in Outlook tagged as FMP are deleted from Outlook and freshly repopulated with the selected Core contacts. You can cherry pick what Core contacts are pushed to Outlook, by selecting the check box for each Core contact shown in the image below.



We try to populate all necessary fields, but additional fields can be customized depending on your needs. These 3 caveats should be noted:

1) The email labels "E-mail (w)," "E-mail (h)" and "E-mail (o)" in the Core will populate the "E-mail," "E-mail 2" and "E-mail 3" labels in Outlook. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push emails and the email labels into Outlook. Since Outlook can only support three email addresses, the first three email addresses in the Core are pushed to Outlook in the same order they appear in FileMaker.

2) The phone number labels "Work," "Home," "Mobile," "Fax," and "Pager" in the Core correspond to the "Business," "Home," "Mobile," "Business Fax," and "Pager" labels in Outlook. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push phone number and phone number labels into Outlook.

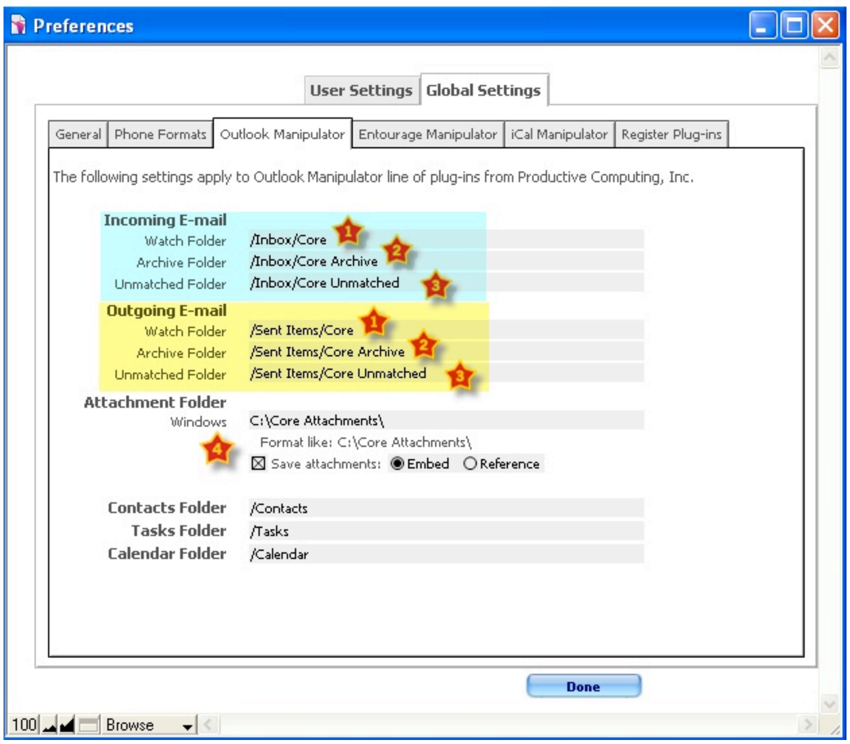
3) The physical address labels "Work" and "Home" in the Core correspond to the "Business" and "Home" address labels in Outlook. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push address and address labels into Outlook.

Mail

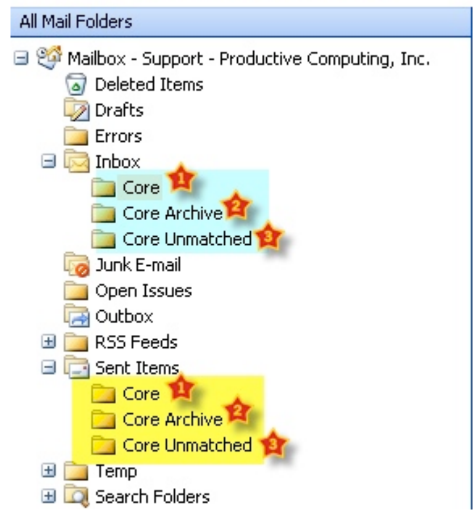
You can send plain text formatted emails with multiple attachments without an Outlook security dialog. The option to send HTML formatted emails is possible, but not built into the Core. This option can be customized.

You can also import Outlook emails with attachments into the Core allowing you to keep a complete email correspondence history. The emails are parsed into the Core and linked up to the corresponding contact based on the To, From and CC email addresses. You have the option to embed email attachments in the Core or store the attachments as a reference. To set up the mail import functionality navigate to Preferences > Global Settings > Outlook Manipulator tab and refer to the screen shots and corresponding stars below as a guide.

Core Preferences



Outlook Folder List

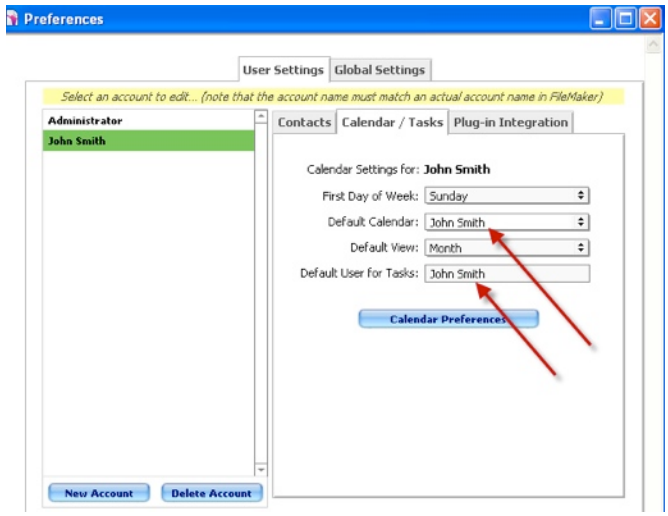


1. Incoming and Outgoing Watch Folders = All emails in these Outlook folders will be imported into the Core.
2. Incoming and Outgoing Archive Folders = After emails are successfully imported into the Core and linked to a corresponding Core contact, these emails are moved into this archive folder.
3. Incoming and Outgoing Unmatched Folders = If during the email import an email is not successfully linked to a corresponding Core contact, then the email is moved to this unmatched folder allowing you too add the email address and re-import these unmatched emails.
4. Attachment Folder = Option to embed email attachments directly in the Core or store as a reference.

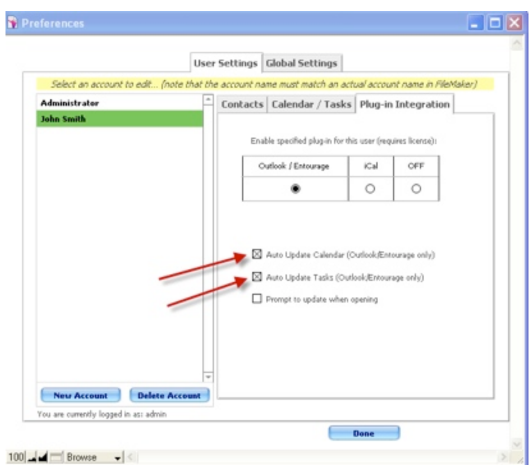
**You can create your own Watch, Archive, and Unmatched folder names, but please be mindful that the corresponding folder exists in Outlook as shown in the "Outlook Folder List" screen shot above. Also a "/" indicates a subfolder, so please do not use "/" in your Outlook folder names.

Calendar and Tasks

You can perform a unidirectional data exchange from the Core to Outlook for all task and calendar items. All calendar and task items pushed to Outlook are tagged in the Outlook category as FMP. The next time you select the "Populate" button, a purge and push occurs. This means that all calendar and task records in Outlook tagged as FMP are deleted and freshly repopulated with the USER's default calendar and tasks. The user's default calendar and tasks can be set up in Preferences > User Settings > Calendar / Tasks tab as shown in the image below. Please also note that calendar and task items also have the ability to auto update, which eliminates the need to purge and push. The auto update is explained below.



Calendar and Task items also have an auto update feature, which eliminates the need to perform this purge and push. First you will need to enable the check boxes shown below found on the Preferences > User Settings > Plug-in Integration tab.



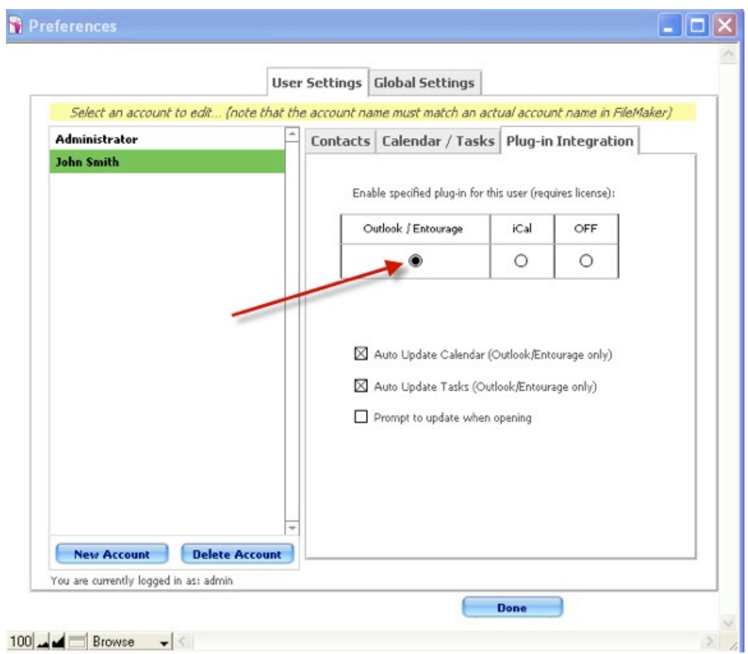
Then you must initially push your calendar and task items by selecting the "Populate" button as previously explained. Afterwards each time you add or update a Core calendar or task item, the new or updated item will auto populate in Outlook without having to push any buttons and go through the purge and push process. This feature allows you to auto update Outlook with each Core calendar or task item as they are created or edited.

16) Functionality with Entourage

The Core² CRM has the following "out of box" functionality with Entourage:

- Ability to send plain text formatted emails with multiple attachments without a security dialog.
- Ability to import Entourage email items with attachments into FileMaker. The email items are parsed into FileMaker and linked up to the corresponding contact based on the To, From and CC email addresses. You can choose to embed email attachments in FileMaker or store the attachments as a reference.
- Unidirectional data exchange from the Core to Entourage for all contacts, task and calendar items.
- Auto update feature from the Core to Entourage for all task and calendar items.

In order to take advantage of the Entourage data exchange, you will need to enable the plug-in for each user using the plug-in by selecting the radio box below found in Preferences > User Settings > Plug-in Integration.

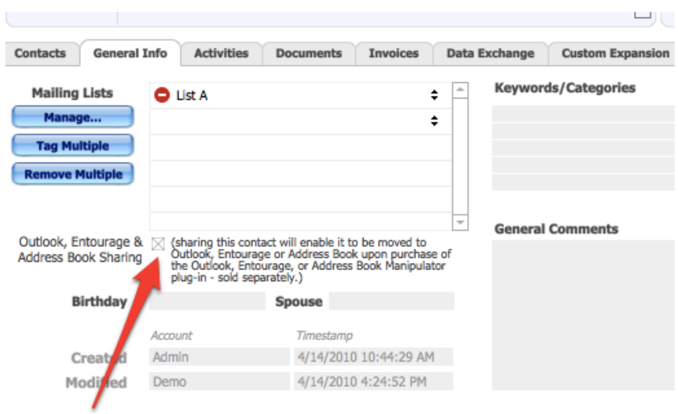


Once you have enabled the plug-in for a specific user, then that user can use the buttons shown below to exchange data for each area in Entourage. These buttons can be found on the Data Exchange tab in Core.

Let’s look at the “out of box” functionality for each corresponding Entourage area when using the Entourage Manipulator with the Core:

Contacts

You can perform a unidirectional data exchange from the Core to Entourage for all contacts. All contacts pushed from the Core into Entourage are tagged in the Entourage category field as FMP. The next time you select the “Populate” button, a purge and push occurs. This means that all contacts records in Entourage tagged as FMP are deleted from Entourage and freshly repopulated with the selected Core contacts. You can cherry pick what Core contacts are pushed to Entourage, by selecting the check box for each Core contact shown in the image below.



We try to populate all necessary fields, but additional fields can be customized depending on your needs. These 3 caveats should be noted:

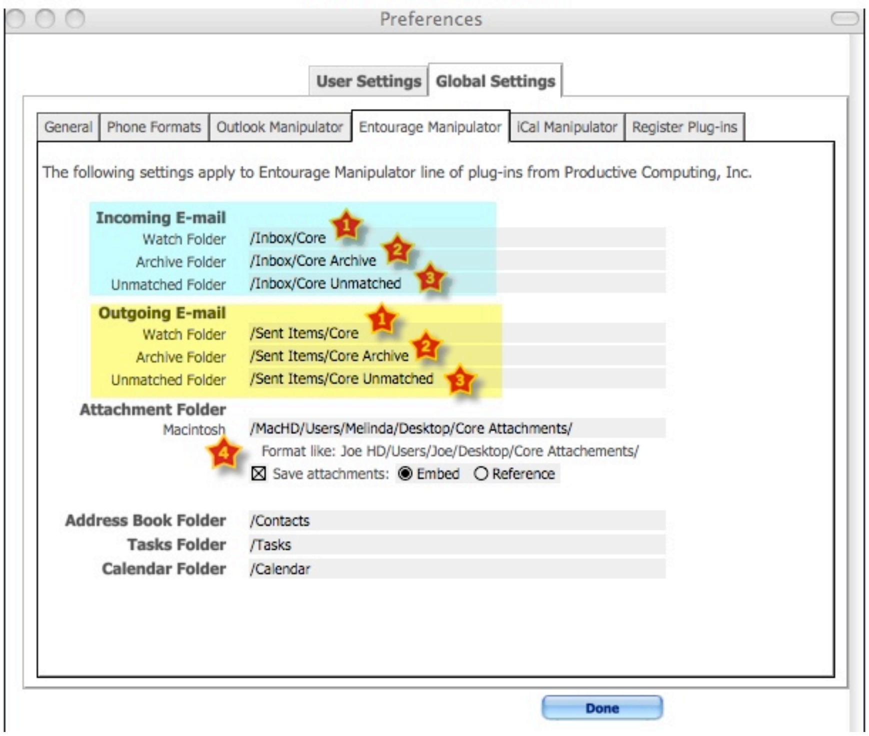
1) The email labels “E-mail (w),” “E-mail (h)” and “E-mail (o)” in the Core correspond to the “work,” “home” and “other” labels in Entourage. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push emails and the email labels into Entourage. The first three email addresses are pushed to Entourage.
2) The phone number labels “Work,” “Home,” “Mobile,” “Fax,” and “Pager” in the Core correspond to the “Work,” “Home,” “Mobile,” “Work Fax,” and “Pager” labels in Entourage. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push phone number and phone number labels into Entourage.
3) The physical address labels “Work” and “Home” in the Core correspond to the “Work address” and “Home address” labels in Entourage. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push address and address labels into Entourage.

Mail

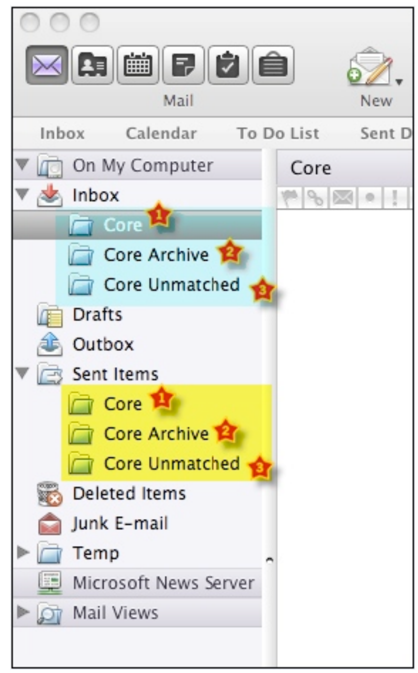
You can send plain text formatted emails with multiple attachments without an Entourage security dialog. The option to send HTML formatted emails is possible, but not built into the Core. This option can be customized.

You can also import Entourage emails with attachments into the Core allowing you to keep a complete email correspondence history. The emails are parsed into the Core and linked up to the corresponding contact based on the To, From and CC email addresses. You have the option to embed email attachments in the Core or store the attachments as a reference. To set up the mail import functionality navigate to Preferences > Global Settings > Entourage Manipulator tab and refer to the screen shots and corresponding stars below as a guide.

Core Preferences



Entourage Folder List

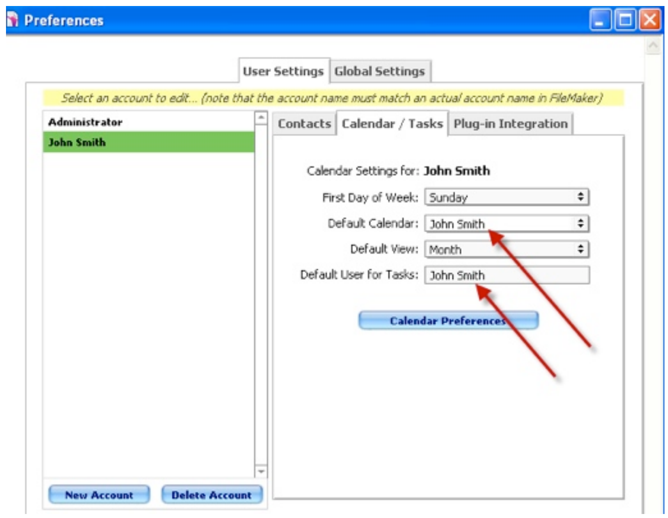


1. Incoming and Outgoing Watch Folders = All emails in these Entourage folders will be imported into the Core.
2. Incoming and Outgoing Archive Folders = After emails are successfully imported into the Core and linked to a corresponding Core contact, these emails are moved into this archive folder.
3. Incoming and Outgoing Unmatched Folders = If during the email import an email is not successfully linked to a corresponding Core contact, then the email is moved to this unmatched folder allowing you too add the email address and re-import these unmatched emails.
4. Attachment Folder = Option to embed email attachments directly in the Core or store as a reference.

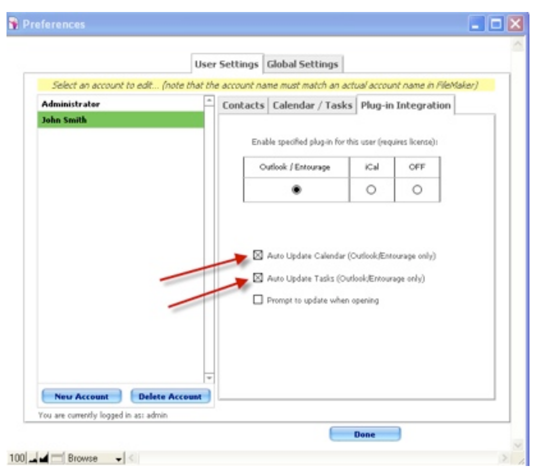
**You can create your own Watch, Archive, and Unmatched folder names, but please be mindful that the corresponding folder exists in Entourage as shown in the "Entourage Folder List" screen shot above. Also a "/" indicates a subfolder, so please do not use "/" in your Entourage folder names.

Calendar and Tasks

You can perform a unidirectional data exchange from the Core to Entourage for all task and calendar items. All calendar and task items pushed to Entourage are tagged in the Entourage category as FMP. The next time you select the "Populate" button, a purge and push occurs. This means that all calendar and task records in Entourage tagged as FMP are deleted and freshly repopulated with the USER's default calendar and tasks. The user's default calendar and tasks can be set up in Preferences > User Settings > Calendar / Tasks tab as shown in the image below. Please also note that calendar and task items also have the ability to auto update, which eliminates the need to purge and push. The auto update is explained below.



Calendar and Task items also have an auto update feature, which eliminates the need to perform this purge and push. First you will need to enable the check boxes shown below found on the Preferences > User Settings > Plug-in Integration tab.



Then you must initially push your calendar and task items by selecting the "Populate" button as previously explained. Afterwards each time you add or update a Core calendar or task item, the new or updated item will auto populate in Entourage without having to push any buttons and go through the purge and push process. This feature allows you to auto update Entourage with each Core calendar or task item as they are created or edited.

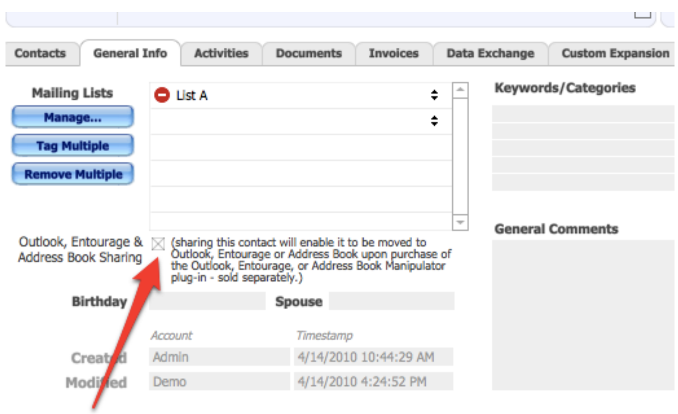
17) Functionality with Apple's Address Book

The Core² CRM has the following "out of box" functionality with Apple's Address Book:

- Unidirectional data exchange from the Core² CRM to Apple's Address Book for all contacts.

In order to take advantage of the Address Book data exchange, you simply select the "Populate" button as shown below. This button can be found on the Data Exchange tab in Core.

All contacts pushed from the Core into Apple's Address Book are tagged as FMP in the "other" field in Apple's Address Book. The next time you select the "Populate" button, a purge and push occurs. This means that all contacts records in Apple's Address Book tagged as FMP are deleted from Apple's Address Book and freshly repopulated with the selected Core contacts. You can cherry pick what Core contacts are pushed to Apple's Address Book, by selecting the check box for each Core contact shown in the image below.



We try to populate all necessary fields, but additional fields can be customized depending on your needs. These 3 caveats should be noted:

1) The email labels "E-mail (w)," "E-mail (h)" and "E-mail (o)" in the Core correspond to the "work," "home" and "other" labels in Address Book. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push emails and the email labels into Address Book. An unlimited number of email addresses can be pushed to Address Book.

2) The phone number labels "Work," "Home," "Mobile," "Fax," and "Pager" in the Core correspond to the "work," "home," "mobile," "work fax," and "pager" labels in Address Book. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push phone number and phone number labels into Address Book.

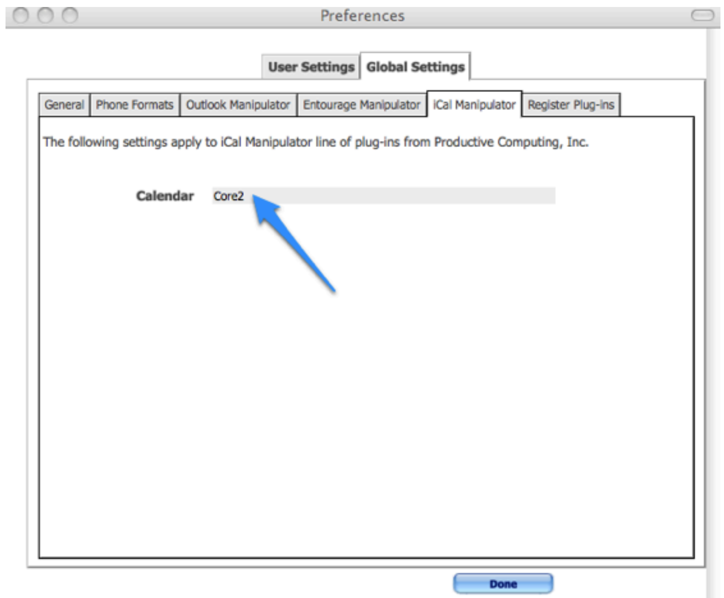
3) The physical address labels “Work” and “Home” in the Core correspond to the “work” and “home” address labels in Address Book. If these labels are changed in the Core, then the related scripts will also need to be adjusted in order to correctly push address and address labels into Address Book. All other physical address labels pushed from the Core to Address Book are labeled as “other” in Address Book.

18) Functionality with Apple's iCal

The Core² CRM has the following "out of box" functionality with Apple's iCal:

- Unidirectional data exchange from the Core² CRM to Apple's iCal for all calendar events and tasks.

You can perform a unidirectional data exchange from the Core to iCal for all events and tasks. All events and tasks are pushed to iCal on a new calendar. This new calendar in iCal will take the name of whatever you specify in the Core Preferences > Global Settings > iCal Manipulator tab as shown in the image below.



In order to take advantage of the iCal data exchange, you simply select the "Populate" button as shown below. This button can be found on the Data Exchange tab in Core.

Each time you select the "Populate" button, a purge and push occurs. This means that the entire iCal calendar created by the Core is deleted and is freshly repopulated with the Core calendar events and tasks. This means that you should never directly use the calendar in iCal created by the Core for anything as each time you select "Populate," this iCal calendar and ALL its contents will be completely deleted and repopulated with the Core calendar events and tasks. **I repeat, please do not make any changes directly in iCal to this new iCal calendar or else you risk losing all changes made directly in iCal.**

We try to populate all necessary fields, but additional fields can be customized depending on your needs. Please note that the repeat settings are not pushed over to iCal. Each event in the Core is pushed to iCal as a separate event for that specific date/time. The repeat settings can be added as a customization and are not included in the "out of box" Core functionality.

19) Functionality with QuickBooks

The Core² Invoices has the "out of box" functionality to perform a bidirectional data exchange with Quick Books for specific areas. The plug-in can talk to additional QuickBooks areas and can be customized to meet your specific needs. This functionality typically provides a good foundation to build upon or can just be use as is.

The Data Transfer Matrix below shows the "out of box" QuickBooks integration ability of the Core² Invoices. For specific functionality please refer to the Core² Invoices QuIck Start Guide.

QuickBooks Area	FileMaker QuickBooks Data Transfer Matrix					
	FM to QB Add	FM to QB Mod	FM to QB Del	QB to FM Add	QB to FM Mod	QB to FM Del
Customers	Yes	Yes	-	Yes	Yes	-
Invoices & Inv Line Items	Yes	Yes	-	Yes	Yes	-
Payments & Pymt Line Items	Yes	Yes	Yes	Yes	Yes	-
Items	Yes	Yes	-	Yes	Yes	Update Indicator
Accounts	-	-	-	Yes	Yes	Yes
Payment Methods	Yes	-	-	Yes	-	Update Indicator
Sales Reps	-	-	-	Yes	-	Update Indicator
Payment Terms	-	-	-	Yes	-	Update Indicator
Shipping Methods	Yes	-	-	Yes	-	Update Indicator
Customer Messages	Yes	-	-	Yes	-	Update Indicator

V. Contact Us

There are several other features that are not described in this document. It would be very beneficial for the user to review the in-depth Core² CRM videos we have created at www.core2crm.com. These videos explore the features visually in greater detail and depth. In addition they provide the end user with basic visual training of the Core² CRM Solution.

The Core comes fully unlocked allowing you to customize the solution according to your needs. Implementing customizations require knowledge of FileMaker scripting, relationships and calculations. If you need additional support for scripting, customization or setup, then please contact us via the avenues listed below.

Phone: 760-510-1200
Email: support@productivecomputing.com
Forum: www.productivecomputing.com/forum

Please note assisting you with customizations and set up is billable at our standard hourly rate. We bill on a time and materials basis billing only for the time in minutes it takes to assist you. We will be happy to provide you with a free estimate if you fill out a Request For Quote (RFQ) at www.productivecomputing.com/rfq . We are ready to assist and look forward to hearing from you!