

CoreTrac Link™

Feature Functionality

CoreTrac Link is an affordable, secure, easy-to-use Sales Force Automation solution built specifically for community financial institutions.

Feature	Functionality	CoreTrac Link™ Advantage
Contact Management	The contact management view displays retail and commercial contact information, profile demographics, account relationships, opportunities, events, and notes.	View your prospect's and client's complete relationship with your institution, and provide a seamless transition when multiple employees are working with a single contact, even when in different branches.
Lead & Referral Management	Users create and track opportunities throughout their entire life cycle, from creation to follow-up phone calls, meetings, notes and, finally, winning the new business.	Never lose a lead again. Employees can refer business opportunities and manage pipelines in real-time--independent of department, branch or geographic location.
AutoLead	With AutoLead, the financial institution can establish referral queues based on product, role, department, branch etc.	AutoLead takes the guesswork out of sending referrals to the right person, department, or branch.
Compensation	Compensation plans can be set by role, by employee or by branch. Plans consist of rules that can be incentive or commission based.	Flexibility of rules provides user with a variety of employee compensation options that reward them for achievement of the financial institution's strategic sales and service goals.
Performance View	Users and managers monitor the potential business in their pipeline, their production, their goals, and their incentive compensation earned to date.	The performance view keeps employees focused on the rewards for their achievement of the financial institution's strategic goals, which can lead to broader team success.
Calendar	Schedule calls, meetings, and other events and tasks for yourself or other employees with CoreTrac Link's calendar.	Allows users to see any event scheduled with a contact so they are not stepping on each other's toes when working on a shared opportunity with a single contact.
Reports	Users receive reports on referrals, pipeline, production, goals, lost business, performance, and calls. Reports can be sorted by branch, user, product, and/or date.	The variety of detailed reports instantly provides senior management and supervisors an overall view of how employees, branches, and the organization as a whole are performing.
Administration	Administration functions provide key users with the ability to control customizable aspects of the software.	User friendly controls allow the Administrator to tailor the system to the financial institution's unique terms, products, permissions, etc., and is adaptable to the organization's changing needs.

The CoreTrac Link software is installed on your server behind your firewalls. Minimum requirements include: Mid-range business server with a minimum 4 GB RAM, Microsoft SQL Server 2005 or higher, Windows 2003 Server or higher running web services, Microsoft Internet Explorer, Version 6.0 or higher