

CoreTrac Link™

Product Sheet



Affordable Sales Force Automation Built Specifically for Community Financial Institutions

CoreTrac Link™ is custom built for the banking industry and its unique operational workflows

No longer will you have to force fit your business model into generic solutions that service multiple industries, instead, begin leveraging the tools of Contact Management, Lead/Referral Tracking, Pipeline Management, Compensation Scoring and Management Reports that make sense to community financial institutions from day one!

Never lose track of a referral, lead, or pipeline opportunity again

CoreTrac Link™ lead management allows you to create and track leads for clients and prospects. You can manage the lead through its entire life cycle, from the creation of the lead, follow up phone calls, meetings, notes, and finally, winning the new business. Employees can refer business opportunities to each other independent of department, branch or geographic location.

CoreTrac Link™ Contact Management helps track your client and prospect contact information, profile demographics (such as age, income, tax bracket), sales opportunities and more

You can pull or push leads between employees to ensure the client gets a seamless transition when working with multiple employees, even in different branches. From the client view, you also can schedule events and assign tasks to other employees, and track them through to resolution.

Stay informed with timely management reports

As an employee or a supervisor, you can stay informed with timely reports on referrals, pipelines, production, goals, lost business, performance, and call reports. CoreTrac Link™ reports can be run by branch, user, product, and/or by date. Reports give executives and supervisors an overall view of how employees, branches and the organization as a whole are performing.

CoreTrac Link™ is banking-specific for the way you do business

This is an easy-to-use, scaled-down, non-integrated version of CoreTrac's popular core-integrated, banking-specific CRM/Sales Force Automation solution—ResourceOne. In addition, it is upgradeable to the full suite of ResourceOne!

If you're not quite ready for an end-to-end comprehensive enterprise CRM/Sales Force Automation solution right now, but are in need of an easy-to-use, secure, browser-based software application running on your internal network, then CoreTrac Link™ is the tool you need today.

Oh yeah... CoreTrac Link™ provides your organization with unlimited seats included with your license, not just the 5 seats other systems offer – so bring the whole organization together to win more business!