

RESOURCEONE'S
FEATURE FUNCTIONALITY

CUSTOM
REPORT
WRITER

PROFITABILITY
TRACKING

LEAD &
REFERRAL
TRACKING

INCENTIVE &
COMPENSATION
TRACKING

WEBSITE
OPPORTUNITY
TRACKING

AUTOMATED
ONBOARDING
& TASK
MANAGEMENT

INTEGRATION TO YOUR
CORE, MS OUTLOOK,
LOTUS NOTES, AND
OTHER SYSTEMS SUCH AS
BROKERAGE AND TRUST

CLIENT
MANAGEMENT
FOR ALL RETAIL
AND COMMERCIAL
CLIENTS

NEXT BEST
PRODUCT
RECOMMENDATION

SERVICE
CENTER CASE
MANAGEMENT

MARKETING
CAMPAIGN
MANAGEMENT

RESOURCEONE FEATURE FUNCTIONALITY

CoreTrac

Power • Performance • Success

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