



CORETRAC

EXTENDED PROFILE



OVERVIEW

CoreTrac is Aptean's CRM software solution designed specifically for financial institutions with over \$50m in assets. CoreTrac's aim is to break down silos and create a personalized customer experience that is consistent across all departments and communication channels.

The finance-specific platform offers features such as a profitability tracker, which enables users to actively monitor and evaluate their most profitable clients. An ad engine allows users to generate ads in real-time to capitalize on clients' behaviors and a lead capture tool automatically manages requests from visitors to the users' websites. Coupled together, this allows users to make targeted financial offers, such as a loan or credit card offer, to visitors to their site in real-time.

Integration with existing business software is another facet of CoreTrac's CRM solution, for example, the reports generator can be used with all SQL databases to create custom reports. Other core features include client, lead, and referral management that allow users to establish referral queues based on product, role, and department.

Aptean offers a choice of deployment options for CoreTrac, allowing clients to host the solution on-premise or on a dedicated cloud. Similarly, clients can choose a SaaS pricing model or 'Respond', a role-based access model that allows clients to pick only the features they require at the lowest price.

FEATURE OVERVIEW



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	CoreTrac
SOFTWARE FEATURES	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✗
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✓
QUOTATION HANDLING	✗

TASK ASSIGNMENT	X
TERRITORY/QUOTA MANAGEMENT	X
SUPPLEMENTARY FEATURES	
CPQ	X
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
FURTHER INFORMATION	