



MARQUIS

Marquis Development Road Map: A Path to Excellence

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Cloud Solutions

Industry and Peer Comparative Analytics

3rd Party Integrations

Seamless Integration Across All Solutions

ExecuTrax NEXT MCIF

Business Insights Reporting | Dashboards

DocuMatix Digital Platform

CenTrax NEXT HDMA | Fair Lending | CRA

CallTrax NEXT CRM

NEXT STOP...

CallTrax NEXT

- Add Prospects directly in CallTrax Next and have ExecuTrax automatically updated.
- Expanded Role Permissions for Adding Comments to Activity Logs and changing Assigned For Officer
- Expanded Bulk Logs functionality to include reassignment of logs
- Enhanced Activity Log Report to incorporate Log comments
- Symbol for Alert Logs in Activity Summary Section for more visibility





NEXT STOP...

Business Insights

- Enhanced grouping of Campaign Tracking Reports – easier to organize view of reports and summarize reports groups
- Expanded delete option for Campaign Tracking reports to include “mass delete” option
- Enhanced Campaign Tracking Setup page by including cost setting



NEXT STOP...

CenTrax NEXT

- Auto-fill exempt codes in proper fields for activity years of 2018 or later
- Option to include Distressed/Underserved tracts
- Improvements and enhancements to existing reports
- 2022 HMDA Validity and Quality Edits
- 2020 CRA Aggregate Data

DOCUMATIX
Digital Platform

Seamless
Integrations Across
All Solutions



EXECUTRAX NEXT

- Unified Product Suite
- Faster and Smarter Daily Processing
- Intuitive Campaign Management
- Improved Results Tracking down to the Account Level
- Easy-to-use distributed application and accessible in your favorite browser
- And so much more

Comparative Analytics

- Applying Data Science to your and Industry Wide Results
- Making your data more powerful.
- Data from marketing campaigns across the industry - ROI, conversion, response rate - compiled so that you can compare your results to your peers and competitors.

3rd Party Integration

- Integrating with Software and Systems you are already using.

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