What's at your CORE?

OnCore Suite 2.0

CRM

A relationship workspace built around credit union service, follow-up, and accountability.

Original Need

Disconnected relationship work needed one accountable home.

2.0 Platform

OnCore Suite 2.0 gives the suite a scalable foundation for growth.

United Solutions Company
XP2 Educational Conference — June 2026

Where It Started

The original vision was to bring disconnected work into one shared experience.

The first version proved there was real value in a unified suite.

The Problem

Important work lived in too many places: conversations, emails, notes, spreadsheets, and separate systems.

The Goal

Create a practical suite that made the work easier to capture, route, follow up, and report on.

The Result

The concept worked — users needed one place to see the work, own the work, and close the loop.

OnCore Suite 2.0 keeps that original purpose and rebuilds it on a stronger foundation.

Example Story: The Follow-Up That Gets Lost

A member conversation should not depend on memory or side notes.

Before CRM

A member asks about a loan product, account issue, or next step. The request may be captured in an email, a note, or a conversation. Later, follow-up depends on who remembers.

What Can Happen

The member calls back, but the next staff member does not have the full context. The work is not necessarily lost—but it is hard to prove who owns it.

With OnCore Suite

The interaction is captured, assigned, given a follow-up date, updated through status, and closed with notes and documents.

The product need: make follow-up visible, owned, and repeatable.

Example Story: The Shared Queue Problem

Branches, call centers, lending, and back-office teams need work to land somewhere clear.

A Request Comes In

A member request needs action from another team. It may start at a branch, call center, email inbox, or internal handoff.

Without a Queue

Ownership can be unclear. The work may sit with the person who first heard about it, even though another department needs to act.

With OnCore Suite

The request can be routed into a department queue, assigned to the right user, and tracked until completion.

Example Story: Leadership Needs Visibility

Managers need to know what is moving, what is stuck, and where teams need help.

Without visibility, leaders see fragments. With OnCore Suite, they see the work.

Overdue Work

What needs attention today?

Unassigned Work

What is sitting in a queue?

Follow-Up Dates

What is due soon?

Team Load

Who owns what?

Visibility changes the conversation from “Who has this?” to “Here is what needs action.”

OnCore Suite — Built for Member Relationship Work

A CRM-style product designed around credit union workflows.

One workspace to manage members, interactions, opportunities, campaigns, daily activities, queues, and team performance.

ACT | Activity Board

To Do, Pending, Completed, overdue tracking

INT | Interactions

Member requests, routing, priority, assignment

OPP | Opportunities

Products, follow-up, ownership, outcomes

MEM | Members

360° member profile with related records

CAM | Campaigns

Mail-merge-style outreach by email or text

The result: relationship work and outreach become visible, assignable, measurable, and auditable.

Campaigns: Outreach at Scale

A mail-merge-style system for mass marketing through email or text.

Why it matters

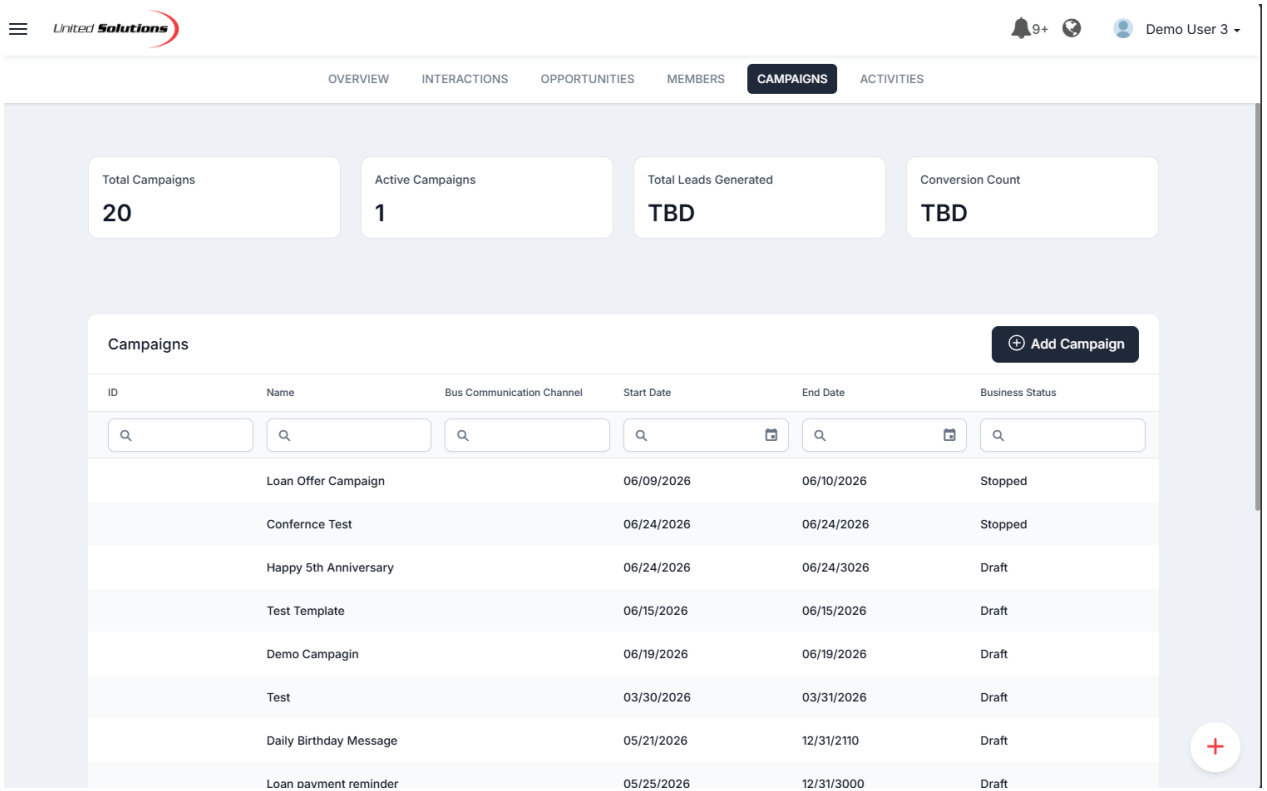
The gap

Marketing campaigns often start outside the CRM. That can split outreach from follow-up, ownership, and results.

With OnCore Suite

Campaigns give teams a place to create outreach, set dates, choose a communication channel, track status, and connect results back to relationship work.

Campaigns help credit unions reach groups of members while keeping follow-up visible.



What We Learned From Real Use

The first product gave us the blueprint for what 2.0 needed to become.

What Worked

- Users need one place to see what needs attention today
- Queues matter: work must be visible by person and department
- Follow-up dates and visual urgency drive action
- OnCore Suite only works if staff can enter work quickly

What We Needed Next

- Manager assignment controls and team visibility
- Status rules to protect completed work
- Audit history for service quality and compliance
- Member context visible without switching screens

Why We Moved to FintechOS

A stronger platform foundation for CRM and the broader OnCore Suite.

Scale

Supports product growth and broader adoption.

Flexibility

Adapts workflows, roles, forms, and business rules.

Integration

Creates a better path for connected systems and services.

Experience

Enables a more modern and consistent user interface.

Governance

Supports permissions, status rules, and auditable actions.

Future Growth

Positions the suite for dashboards, reporting, automation, and AI-assisted workflows.

What This Means for Your Credit Union

A CRM tool designed for service that is tracked, visible, and repeatable.

100% Visible Work

Open, overdue, and due-soon items stay in front of staff.

Zero Lost Follow-Ups

Interactions and opportunities carry status, owner, and due date.

Live Member Context

Related records and product information are visible before action.

Mass Outreach

Campaigns help teams reach groups of members by email or text.

Clear Accountability

Queues, assignments, and status rules make ownership visible.

Stronger Governance

Notes, timestamps, and read-only closed records support compliance.

Let’s take a look at the demo.

OnCore Suite 2.0

Demo path: Member need → Create work → Assign ownership → Launch outreach → Measure outcome

“Every member interaction deserves ownership.”