

Innovative Salesforce Solutions, Lifelong Consulting Partners



STREAMLINED FINANCIAL ACCOUNT VERIFICATIONS

Cloudsquare BankLink empowers businesses to run effortless cash flow analysis, make faster and more accurate credit decisions, and fully automate underwriting processes, by integrating Salesforce with the safest and most customer-friendly financial account verification platform, Plaid.

CS BankLink provides access to borrowers' bank account data across 11,000 institutions worldwide, allowing underwriters to see transactional data in real-time and for up to 24 months.

Fully built and easy to customize, BankLink is ready to be integrated into your online application. Instantly get results along with the application, and if desired, plan an automated flow to analyze and make credit decisions.

Effortless Cash Flow Analysis

By connecting to Plaid Transactions and Balances products, Banklink gives you instant access to borrower data and helps you determine if they will be able to pay back a loan.

Fast, Accurate Credit Decisions

In addition to transactions, balances, and financial bank details, Banklink pulls identity and assets info into your Salesforce CRM as well, helping you validate the borrower and make more confident and accurate decisions.

Fully Automate Your Underwriting Process

Banklink parses all relevant borrower details onto useable fields in the system, allowing you to define custom business logic based on your unique requirements and fully automate approvals and declines. Faster, smarter, and more accurate underwriting.

Cash Flow User Interface

- Our custom UI that goes above and beyond the competition, helping you see everything you need relating to the applicant's transactions and balances for up to 24 months.
- Removes the need for complex Excel spreadsheets, formulas, and lengthy cash flow analysis

Connected to the Following Plaid Products

- Auth: Account & routing numbers
- Balance: Real-time balance checks
- Identity: Bank account-holder information
- Transaction: Up to 24 months of categorized data
- Assets: Point-in-time snapshots of users' finances

See Borrower Banking Information and Transactions Details Directly in Salesforce

- Our easy-to-use user interface saves underwriters hours of analysis, as details are not just parsed but automatically run through our configurable Cash Flow UI to begin processing the results.

Sends an Email to the Applicant, So They Can Authorize the Bank Verification

- Applicants select the bank account, enter their credentials, and submit from desktop or mobile
- When authorized, the data is then sent direct from Plaid to Salesforce
- Full Results Are Displayed on In-Depth and User-Friendly Tables and Summary Screens

Instantly Summarizes Applicant Data in an Overview Section

- Allows faster and more accurate borrower verification and underwriting

All Information Is Also Parsed Out into Data Points

- Details have been parsed down granularly, to the transaction level, for in-depth analysis and borrower transparency
- Configure important fields, such as low balance days and anegative balance days

Useable Fields and Custom Objects Allow Lenders to Automate Their Underwriting Process

- Approvals and declines can be fully automated based on their specifications and custom logic. Automation can be set easily by the end user and changed as necessary.

HEAR IT FROM OUR SATISFIED CLIENTS

“

“They're quick, efficient, and extremely responsive and communicative on a personal level. Cloudsquare's work has driven efficiencies in our sales and management processes and helped us scale our business. They showed genuine commitment to our success by communicating well, devoting their utmost attention, and providing optimal solutions for our needs.”

Zach Fiddle, Co-Founder, President & CEO, CapFront