

Plaid Connect

Instant bank, income, and identity verified data inside Salesforce

Plaid Connect is a Salesforce-native app that pulls verified bank account data, transaction history, income records, and identity information into your CRM. A customer links their bank, payroll, or identity through Plaid, and verified accounts, balances, income, employment, and ID data land on the Salesforce record. No files are scanned or entered manually by the user.

47% Faster Onboarding

Shorten verification and approval cycles

64% Less Manual Review

Replace paperwork with verified data

39% Better Fraud Detection

Identify risky accounts earlier

99% Account Coverage

Connect across 12,000+ financial institutions

Why Businesses choose Plaid Connect

- **No fraud from AI-generated documents.** Beat fraud by pulling verified data directly from trusted sources instead of relying on uploaded documents that may be altered, manipulated, or AI-generated.
- **No more paperwork.** Send white-labeled invites via email or SMS. Customers connect in seconds and complete verification in a single session.
- **One connection, three verifications.** Our Plaid integration Salesforce solution connects to 12k+ financial institutions, 85% of US payroll, 16k+ ID types, and 200+ countries with one authentication.
- **Verification runs automatically.** Trigger checks on record creation, stage change, or field updates via Flow, Apex, or API. Data stores automatically on the record.

Trusted by —      

What it does

Bank, Income & Identity Checks

- **Bank** connections to 12,000+ financial institutions, with secure login, MFA, and OAuth redirection
- **Verify** income across nearly 85% of the US workforce through payroll providers, with document fallback for pay stubs, W-2s, and 1099s
- **Confirm** identity against 16,000+ ID types across 200+ countries, with selfie and liveness checks
- **Watchlist** and data-source screening for KYC and AML are built into the identity flow

Cash Flow, Payments & Automation

- **Live** balance checks prior to each transfer to prevent NSF returns and overdrafts
- **ACH-ready** accounts for one-time and recurring transfers, with payment tokens for secure gateway payments
- **Analyze** cash flow, transaction history, and spending behavior through advanced analytics dashboard
- **Surface** overdraft, NSF, and negative balance risk indicators in real time for faster risk assessment

4.93/5 customer satisfaction • **1,500+ projects delivered** • **400+ customers**

Bank, income, and identity from a single connection.

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