



Originate. Underwrite. **Onboard.**

Any Bank Product.

Onboard 🚀 supercharges 🚀 Salesforce Financial Services Cloud with
real-world, end-to-end banking and lending workflows and integrations

Features Include:

Lending

Account
Opening

Online, mobile-friendly applications	✓	✓
Intuitive step-by-step wizards for bankers	✓	✓
Client / borrower portal	✓	✓
Core booking	✓	✓
Robust File Manager	✓	✓
Automated tax return spreading	✓	
IRS integration	✓	
Covenant & tickler management	✓	
Disclosure management	✓	✓
Ownership & guarantor management	✓	✓
Exception tracking	✓	✓
Compliant document generation	✓	✓
Collateral management	✓	
KYC & KYB automation	✓	✓
Renewals & modifications	✓	
Credit, flood, appraisal ordering	✓	
Electronic signature	✓	✓
Compliance management	✓	✓
Employment & income verification	✓	
Check ordering		✓
Account funding		✓

Consumer &
Business Deposits



Consumer Lending



Residential Home
Lending



Small Business &
Commercial Lending



Business & Consumer
Credit Cards



Treasury Onboarding



No-code iPaaS with pre-built connectors to banking
cores & fintechs, including:

