

Innovative Salesforce Solutions, Lifelong Consulting Partners



THOMSON REUTERS **CLEAR** FOR SALESFORCE

Faster, More Efficient and More Accurate Risk Investigations

Risk investigations and background checks are complex processes that usually take many hours to complete. Between pulling reports, searching for various data points, and collecting all the data together, the process can become very time-consuming and error-prone.

Essential background data on both individuals and businesses can be spread across multiple sources and require multiple logins and validations, and in many cases, requires manual entry to get it into your system.

If you are using inefficient risk investigation processes, you are losing money! To recoup those dollars, you need a solution that can save you time, reduce errors, manage compliance and risk, all while can also improve the customer experience by providing access to accurate public records information.

Run Background Check Directly in Salesforce

The Thomson Reuters CLEAR integration connects your Salesforce CRM to one of the most trusted investigative services on the market, powered by billions of data points and leveraging cutting-edge public records technology. You get access to a collection of comprehensive public and proprietary records, along with sophisticated analytics, all within a single working environment.

With the TR CLEAR integration for Salesforce, you can easily access essential background information, simplify and speed up the investigative process, and get tools to make more accurate decisions.

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“Impressive high-quality work. Cloudsquare has continued to impress with their superior work. They have become a truly reliable partner for our SFDC needs. Very responsive, highly recommended.”

Rafael Vasquez, Berkman Capital

Get the Best of TR CLEAR and Salesforce in One Single Place

Tap into the trusted TR CLEAR investigative services.

- ✓ Access millions of public records from sources such as the top credit agencies, criminal and civil court records, licenses, real property records, phone files, FEIN data, and corporate filing data.

Thorough risk management

- ✓ Run quick ID Confirm/Risk Inform checks with customized risk scoring, data preferences, and filters to have a consistent approach to risk assessment throughout your Salesforce portfolio.
- ✓ Access deep-dive due diligence reports to get the full picture of a person or a business and see all the underlying data.
- ✓ Search a comprehensive court record repository complete with federal and state records. TR Clear Court records include criminal, civil, bankruptcy, liens, judgments, and UCCs.

See Quick Analysis Flags

- ✓ Shows a high-level overview of risk possibilities with simple Yes or No results, such as: Criminal record, Bankruptcies, or Multiple SSN's
- ✓ Get a quick snapshot of the person before ordering a full report

Currently Integrated with 5 TR CLEAR Products

- ✓ Person Search
- ✓ Business Search
- ✓ Court Search
- ✓ CLEAR ID Confirm & Risk Inform Search
- ✓ Quick Analysis Flags
- ✓ Adverse Media Searching Coming Soon

Simplify and Speed Up the Investigative Process

Locate, identify, and connect the facts you need

Thomson Reuters CLEAR is one of the most trusted and comprehensive investigative services on the market, giving creditors, law and tax professionals, financial services professionals, commercial customers, and government investigators the risk management and due diligence information to make smart business decisions.

Faster, simpler, and effective

The TR CLEAR integration for Salesforce reduces the investigation process to a matter of minutes. Pulls can be run in seconds, and the results are quickly returned to Salesforce, parsed onto usable fields, and the full report stored on the record. Say goodbye to multiple screens, multiple logins, and copy/paste.

Intelligent tools for more accurate decisions

TR CLEAR customizable risk scoring allows you to create custom preferences and filters according to your exact risk tolerance levels, and Quick Analysis Flags give you a high-level, instant snapshot of a person or business to help determine if a more thorough investigation is needed.

Contact Us!

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