



What is CLEAR to Salesforce Integration?

CLEAR to Salesforce integration is a more convenient way for businesses to access CLEAR data. It was designed as an API that is versatile for companies across various industries. It allows companies to access accurate and transparent public records research with minimal setup time. The integration streamlines the process and allows a user to get the data directly from Salesforce.

Why should you get it?

With CLEAR to Salesforce integration, your business can make assertive decisions by detecting information that would be difficult to find otherwise. With transparent and holistic data, the analyst or investigator can stay within one tool and work cases in minutes that used to take them hours. They can analyze high volumes of data at once, conduct person and business research, verify the identity of subjects, get sophisticated analytics, resolve fraud concerns, generate red flags alerting of possible risks, and receive reports directly from Salesforce, delivered via PDF.

What licenses are required?

To get started with CLEAR to Salesforce integration, you need to be a customer of Thomson Reuters CLEAR, Cloudsquare, and Salesforce. Cloudsquare will provision the CLEAR to Salesforce Integration licenses.

How does the implementation work?

Option 1: Self-installed

You will be provided with an installation link and a user guide to install and configure the application on your own. With this option, Cloudsquare would not be providing further support.

Option 2: White Glove

Cloudsquare will install and configure the application on your behalf or with your IT team. Additionally, Cloudsquare will work with you to ensure that the application fits into your existing Salesforce workflow. Your business can reach out to Cloudsquare for any support-related requests throughout the license term. You can find the list of services that will be performed in one Salesforce environment (sandbox or production), as chosen by you through the white-glove service:

- Configure the desired CLEAR products to be accessible in Salesforce
- Configure CLEAR to be used off any object
- Configure CLEAR to be utilized on any page layout
- Configure, as desired, the need to constantly run Risk Inform
- Configure, as desired, the need to automatically run CLEAR ID Confirm Reports
- Configure the data sources in Salesforce to be utilized within the integration
- Configure the desired Lightning Pages with applicable CLEAR components: Search, CLEAR Reports, CIDC/ Risk Inform Charts, Quick Analysis Flags
- Configure permissible purposes
- Configure report notifications settings
- User license assignments and permissions
- End-user Training
- User Acceptance Testing Support
- If configured in a sandbox, deployment to production

