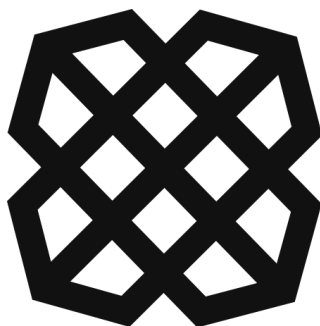




cloudsquare



PLAID HERO

Manual

Cloudsquare
hello@cloudsquare.io

TABLE OF CONTENTS

Admin Guide	3
Post-Installation Steps	3
Register Public Site	3
Add Related Lists	6
Contact Object	6
Page Layout	6
Lightning Record Page	7
Account Object	9
Page Layout	9
Lightning Record Page	9
Plaid Hero Summary Component	10
Contact Object	10
Opportunity Object	11
Update Email Templates	12
Update Org-wide Emails.	12
Configurations	14
Plaid Hero App	14
Authentication	15
Using Your Plaid Account	16
Transactions	19
Identity	20
Balances	21
Buttons	22
Embed Plaid Hero Authentication Process in Your Website	23
URL parameters:	23
User Guide	24
Using Plaid Hero App	24
Authorize Contact(s)	24
Sending Authorization Email	24
Sending Re-authorization Email	27
Plaid Hero Records/Fields	28
Plaid Authorization	28
Bank Account	30
Bank Account Month	31
Summary Component	31
Export Transactions	33
Transactions	35



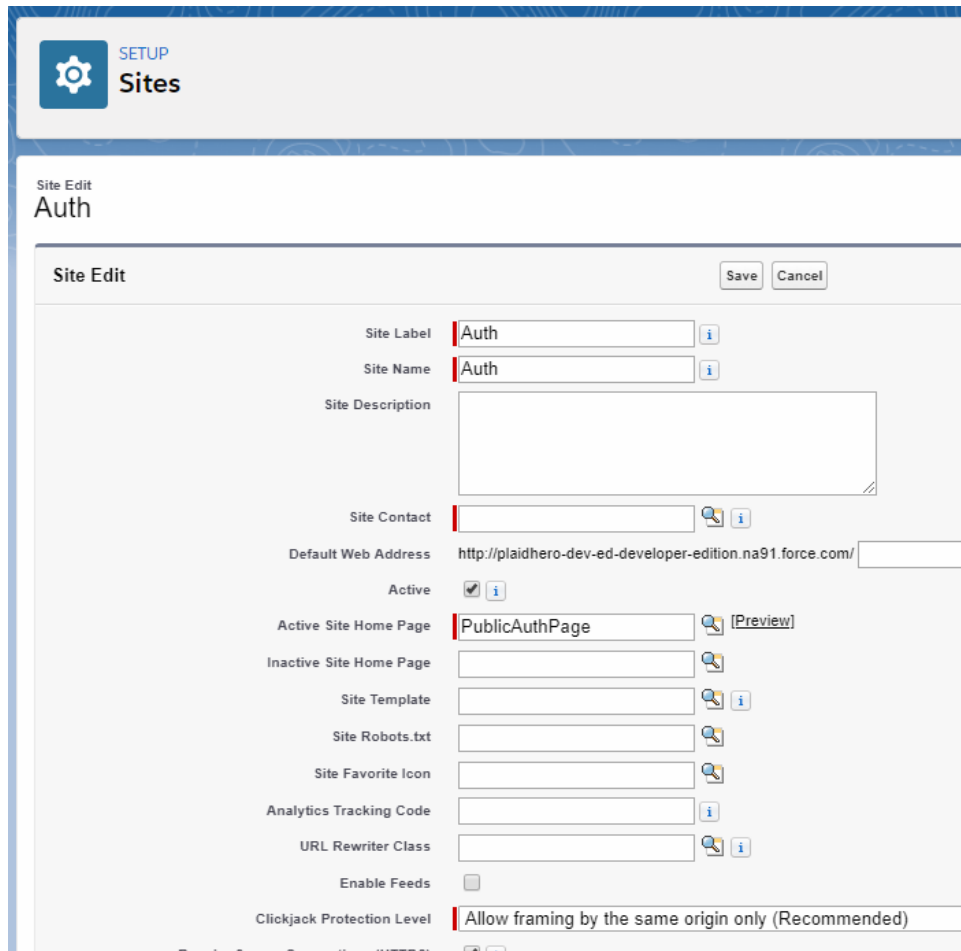
Plaid Hero Dashboard and Reports	36
Dashboard Components	36

ADMIN GUIDE

POST-INSTALLATION STEPS

REGISTER PUBLIC SITE

1. If this is the first site being created on this organization, you will first need to provide a domain for the site page.
2. From Setup, enter Setup, enter Sites in the Quick Find box, then select Sites.
 - a. Create a site page like screenshot below:



The screenshot shows the 'Site Edit' form for a site named 'Auth'. The form is titled 'Site Edit' and has 'Save' and 'Cancel' buttons. The fields are as follows:

- Site Label: Auth
- Site Name: Auth
- Site Description: (empty text area)
- Site Contact: (empty text field)
- Default Web Address: http://plaidhero-dev-ed-developer-edition.na91.force.com/
- Active: ☒
- Active Site Home Page: PublicAuthPage (with a [Preview] link)
- Inactive Site Home Page: (empty text field)
- Site Template: (empty text field)
- Site Robots.txt: (empty text field)
- Site Favorite Icon: (empty text field)
- Analytics Tracking Code: (empty text field)
- URL Rewriter Class: (empty text field)
- Enable Feeds: ☐
- Clickjack Protection Level: Allow framing by the same origin only (Recommended)

- b. You can provide alternative name instead of 'Auth'
 - c. Once complete, click Save.
3. Define Site Security
 - a. We need to enable Apex Class and Visualforce access for the site profile. To configure the security access for the site guest user (profile) click on **"Public"**

Access Settings”.


SETUP
Sites

Site Details
Auth

« [Back to List: Sites](#)

Site Detail

Edit
Public Access Settings
Login Settings
URL Redirec

Site Label	Auth	Site Nan
Site Description		Site Conta
Active	☒	Log
Active Site Home Page	plaidhero.PublicAuthPage [Preview]	Site Favorite Ico
Inactive Site Home Page		Site Robots.t
Site Template		Enable Fee
Analytics Tracking Code		URL Rewriter Cla
Clickjack Protection	Allow frames by the same origin only (Recommended)	Service Service Connectio


SETUP
Profiles

Profile
Auth Profile

Edit Properties

Profile Overview

Assigned Users

Description	User License	Guest User License	Custom Profile
	☒		Created By
Last Modified By	Cloudsquare, 6/25/2019 3:42 PM		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps
Settings that specify which apps are visible in the app n

Assigned Connected Apps
Settings that specify which connected apps are visible i

Object Settings
Permissions to access objects and fields, and settings t are visible

App Permissions
Permissions to perform app-specific actions, such as "n

Anex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sourc

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

- b. Click on “**Apex Class Access**” and then on Edit. Select ‘**plaidhero.PublicAuthController**’ and ‘**plaidhero.TransactionsWebhookRestResource**’ and move them to the Enabled Apex Classes list on the right side.

[Profile Overview](#) > **Apex Class Access** ▼

Apex Class Access

Save
Cancel

Available Apex Classes

- ChangePasswordController
- ChangePasswordControllerTest
- ForgotPasswordController
- ForgotPasswordControllerTest
- MyProfilePageController
- MyProfilePageControllerTest
- SiteLoginController
- SiteLoginControllerTest
- SiteRegisterController
- SiteRegisterControllerTest
- plaidhero.AdminController
- plaidhero.AdminControllerTest
- plaidhero.AuraResponse
- plaidhero.AuthControllerTest
- plaidhero.AuthService

Add

▶

Remove

◀

Enabled Apex Classes

- plaidhero.AuthController
- plaidhero.TransactionsWebhookRestResource

- c. Click on ‘**Visualforce Page Access**’ and then on Edit. Select ‘**plaidhero.AuthPage**’ and ‘**plaidhero.PublicAuthPage**’ and move them to the Enabled Visualforce Pages list on the right side.

[Profile Overview](#) > **Visualforce Page Access** ▼

Visualforce Page Access

Save
Cancel

Available Visualforce Pages

- AnswersHome
- ChangePassword
- IdeasHome
- MyProfilePage
- StdExceptionTemplate
- UnderConstruction
- plaidhero.RecalculateBalancePage
- plaidhero.RefreshAuthenticationInformation
- plaidhero.UserSessionPage

Add

▶

Remove

◀

Enabled Visualforce Pages

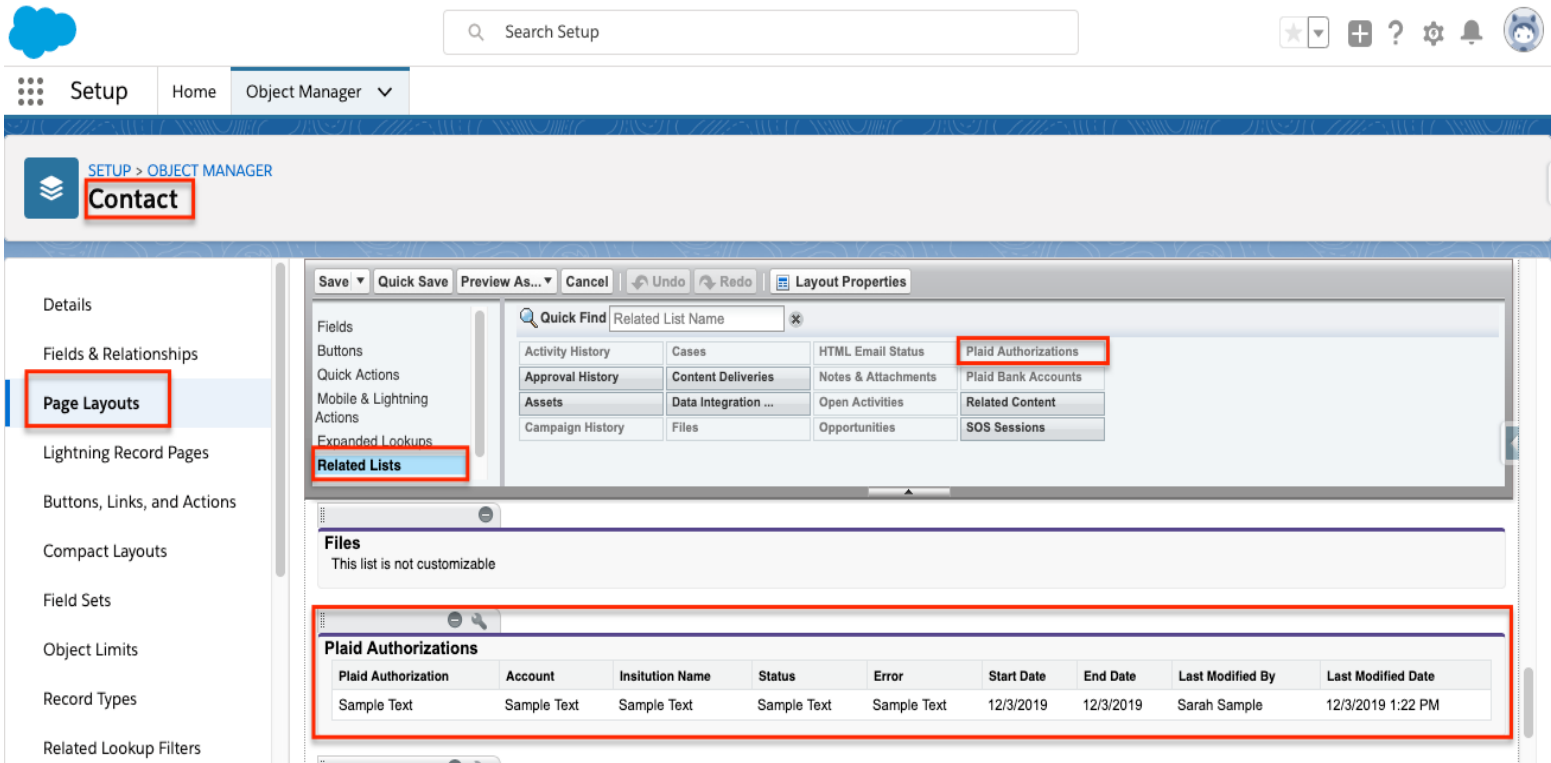
- BandwidthExceeded
- Exception
- FileNotFoundException
- ForgotPassword
- ForgotPasswordConfirm
- InMaintenance
- SiteLogin
- SiteRegister
- SiteRegisterConfirm
- SiteTemplate
- Unauthorized
- plaidhero.AuthPage
- plaidhero.PublicAuthPage

ADD RELATED LISTS

CONTACT OBJECT

PAGE LAYOUT

1. On Contact object go to Page Layout
2. Choose related List and drag Plaid Authorizations to your desire area



Setup > Object Manager > **Contact**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Related List Name

Activity History	Cases	HTML Email Status	Plaid Authorizations
Approval History	Content Deliveries	Notes & Attachments	Plaid Bank Accounts
Assets	Data Integration ...	Open Activities	Related Content
Campaign History	Files	Opportunities	SOS Sessions

Expanded Lookups

Related Lists

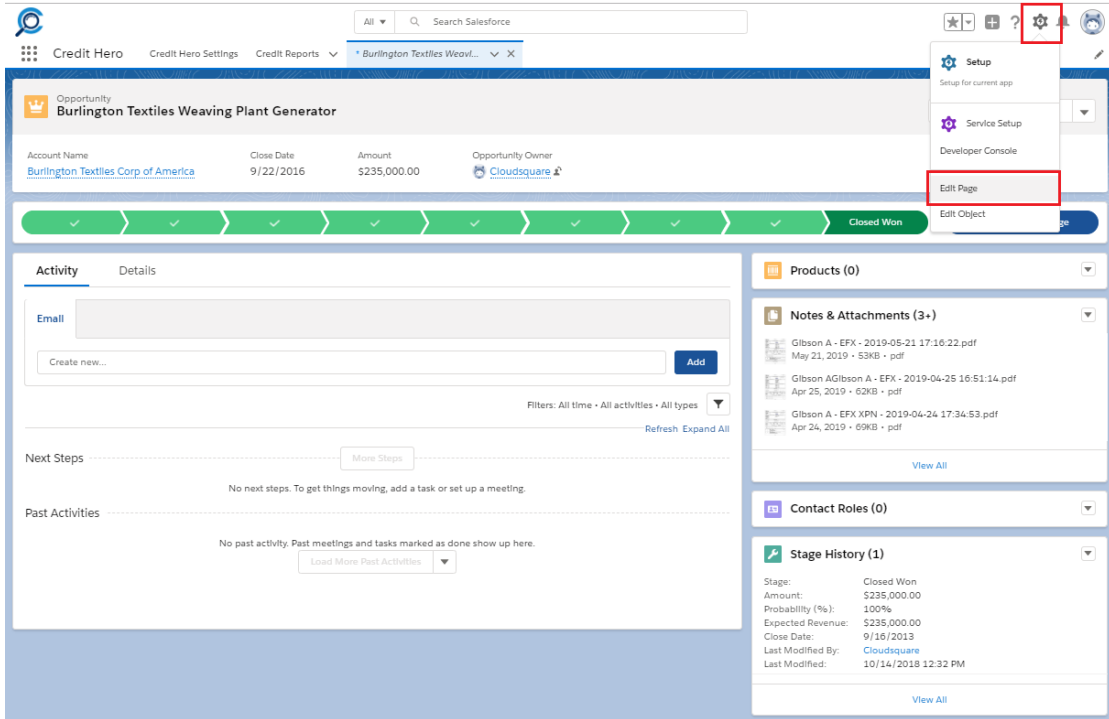
Files
This list is not customizable

Plaid Authorizations

Plaid Authorization	Account	Insitution Name	Status	Error	Start Date	End Date	Last Modified By	Last Modified Date
Sample Text	Sample Text	Sample Text	Sample Text	Sample Text	12/3/2019	12/3/2019	Sarah Sample	12/3/2019 1:22 PM

LIGHTNING RECORD PAGE

1. On Contact record page click on  go to Edit Page



The screenshot shows the Salesforce Lightning Record Page for an Opportunity. The page header includes the Salesforce logo, a search bar, and a navigation menu. The main content area displays the Opportunity details for 'Burlington Textiles Weaving Plant Generator'. A red box highlights the 'Edit Page' option in the top right corner of the page header.

2. Add related List – Single to your desire place
3. On Related List choose Plaid Authorizations
4. On Related List Type choose Enhanced List

5. Set Number of Records to Display to 5

Lightning App Builder Pages Contact Record Page Back Help

Desktop Shrink To View Refresh Save Activation...

Lightning Components

Search components...

- Path
- Potential Duplicates
- Quip
- Quip Document
- Quip Notifications
- Recent Items
- Recommendations
- Record Detail
- Related List - Single**
- Related List Quick Links
- Related Lists
- Related Record
- Report Chart
- Rich Text
- Tabs
- Topics

Get more on the AppExchange

Details Related Plaid Hero

We found no potential duplicates of this contact.

Opportunities

Cases

Campaign History

Files (0)

Plaid Authorizations

Plaid Hero

Activity

Page > Related List - Single

* Parent Record

Use This Contact

* Related List

Plaid Authorizations

Related List Type

Enhanced List

Enhanced related lists can show up to 10 columns at once. Enhanced related lists also let you sort, perform mass actions, resize columns, and wrap text.

Number of Records to Display

5

Show list view action bar

Include the related list you want to use in the page layout for your users. If using a parent

Plaid Hero Plaid Hero Admin Plaid Authorizations Plaid Bank Accounts * Contacts

Contact Mr. Alex Shev

Cases

0 items • Sorted by Date/Time Opened • Updated 30 minutes ago

Campaign History

0 items • Sorted by Created Date • Updated 30 minutes ago

Files (0)

Upload Files

Or drop files

Plaid Authorizations

1 item • Sorted by Account • Updated 3 minutes ago

	Plaid Autho...	Account	Insitution N...	Status	Error	Start Date	End Date	Last Modifi...	Last Modifie
1	PA-000757	Atas LLC	Chase	Lapsed	You have unco...	10/1/2018	1/21/2020	Automated Pro...	12/3/2019 4

View All

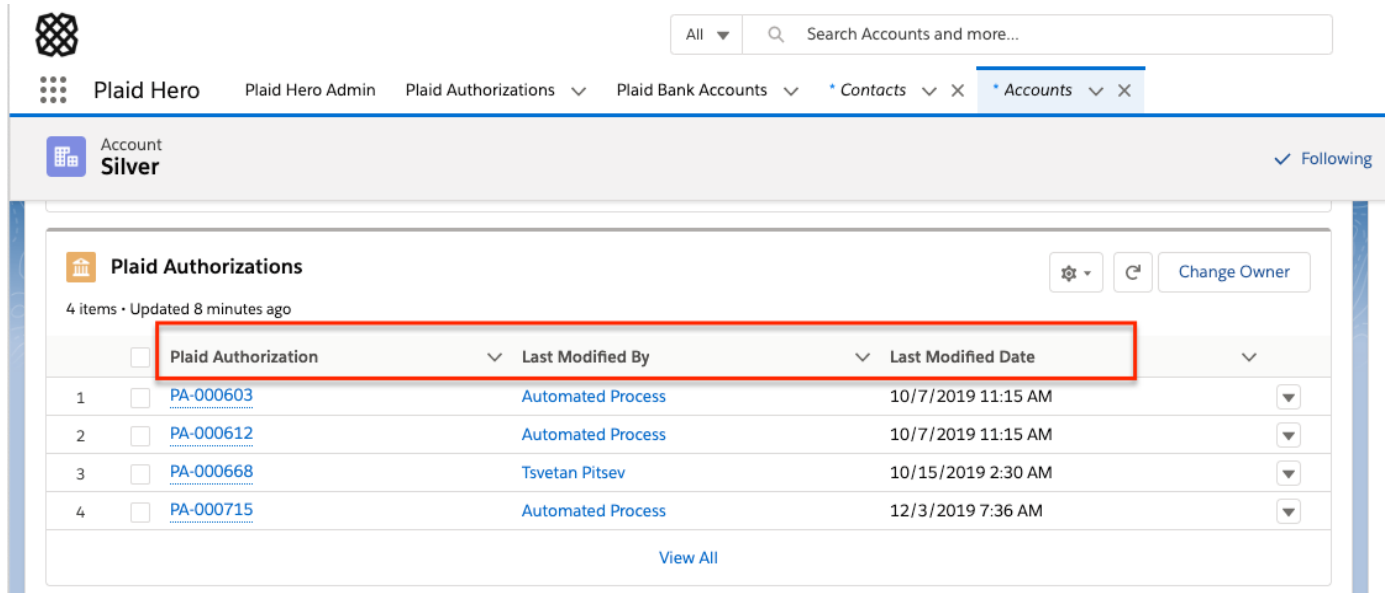
ACCOUNT OBJECT

PAGE LAYOUT

1. Same as Contact Object
2. On Account Object go to Page Layout
3. Choose related List and drag Plaid Authorizations to your desire area

LIGHTNING RECORD PAGE

1. On Contact record page click on  go to Edit Page
2. Add related List – Single to your desire place
3. On Related List choose Plaid Authorizations
4. On Related List Type choose Enhanced List
5. Set Number of Records to Display to 5



The screenshot shows the Plaid Hero interface. At the top, there's a navigation bar with a search bar and several tabs: Plaid Hero, Plaid Hero Admin, Plaid Authorizations, Plaid Bank Accounts, * Contacts, and * Accounts. The * Accounts tab is selected. Below the navigation bar, there's a header for the Account Silver, with a 'Following' status. The main content area displays the 'Plaid Authorizations' list. The list has a table with columns: Plaid Authorization, Last Modified By, and Last Modified Date. The table contains 4 items, updated 8 minutes ago. The first item is PA-000603, created by Automated Process on 10/7/2019 11:15 AM. The second item is PA-000612, also created by Automated Process on 10/7/2019 11:15 AM. The third item is PA-000668, created by Tsvetan Pitsev on 10/15/2019 2:30 AM. The fourth item is PA-000715, created by Automated Process on 12/3/2019 7:36 AM. A 'View All' link is at the bottom of the list.

	Plaid Authorization	Last Modified By	Last Modified Date
1	PA-000603	Automated Process	10/7/2019 11:15 AM
2	PA-000612	Automated Process	10/7/2019 11:15 AM
3	PA-000668	Tsvetan Pitsev	10/15/2019 2:30 AM
4	PA-000715	Automated Process	12/3/2019 7:36 AM

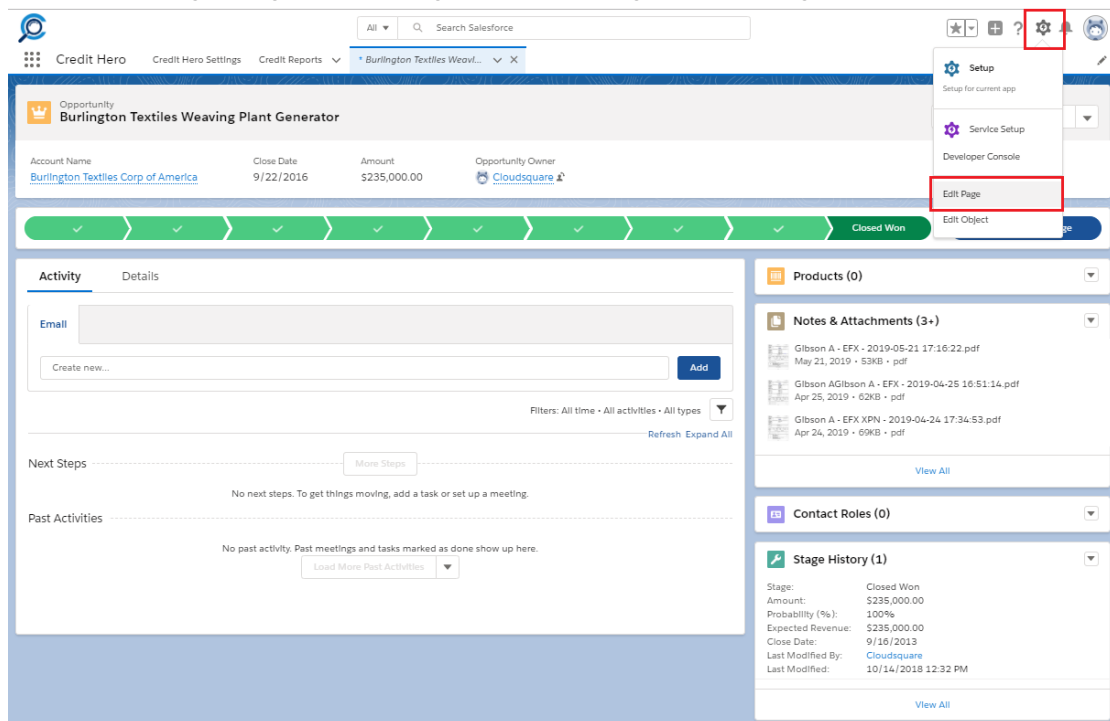
[View All](#)

PLAID HERO SUMMARY COMPONENT

- This component can be included in either the contact or opportunity lightning record page.
- This component contains the main action button that kicks the whole Authorization process off and we will discuss this in detail after learning how to add the component to the appropriate objects Lightning Record Page(s).
- This component provides a summary of all bank accounts for each contact that has successfully completed the authorization process with each corresponding banking institution.

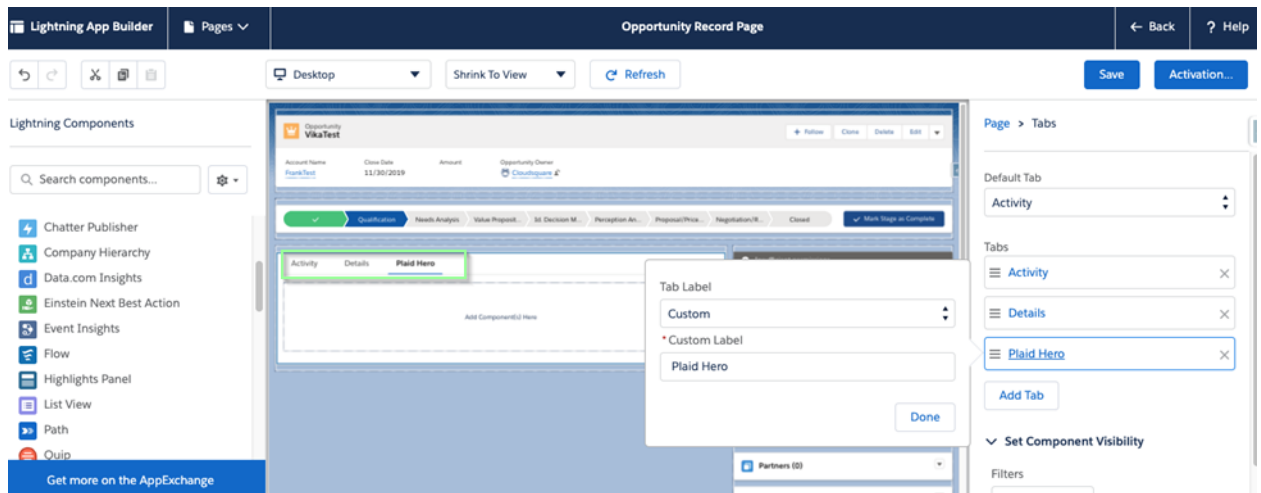
CONTACT OBJECT

1. On Contact Lightning Record Page click on  go to Edit Page



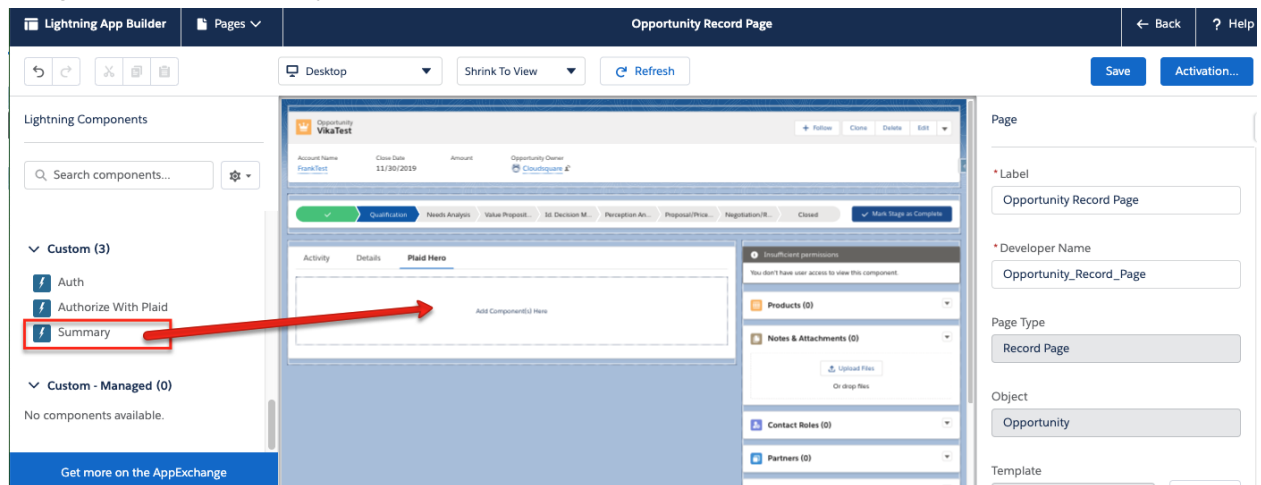
2. Click on Tabs

3. Add Custom Tab and name its Plaid Hero



4. Under Custom Components

5. Drag and drop Summary into this new tab

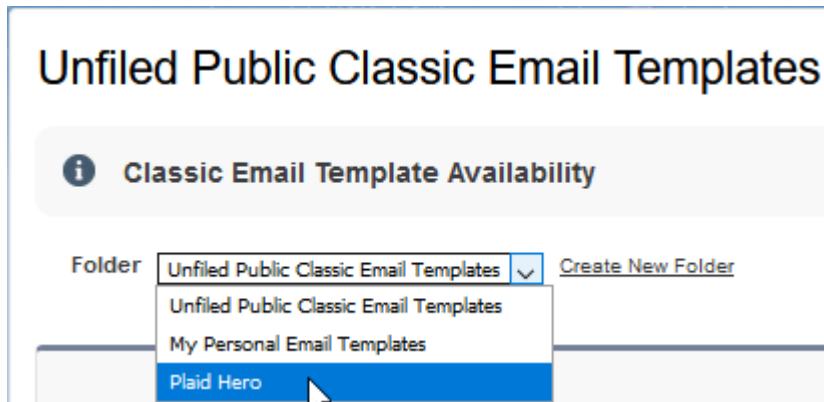


OPPORTUNITY OBJECT

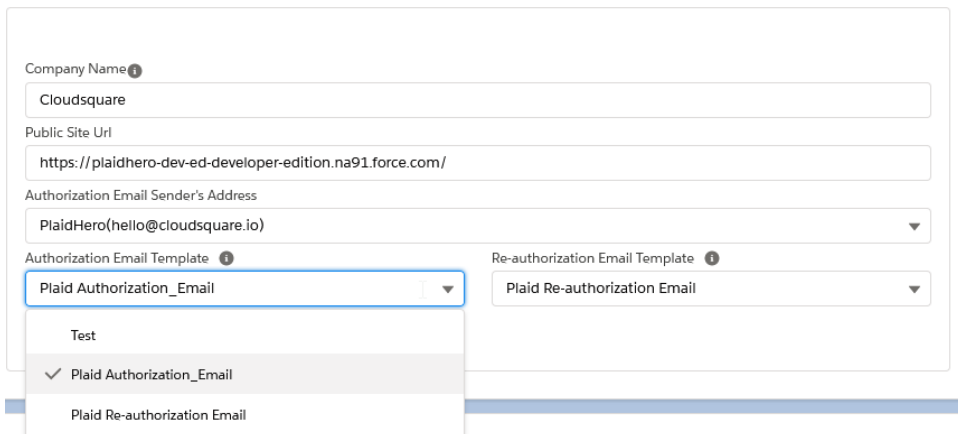
1. Do the same as Contact Object

UPDATE EMAIL TEMPLATES

1. Go to Setup and navigate to the **Classic Email Templates**
2. Click on Folder and choose Plaid Hero



3. You can add your custom email templates or edit the existing templates.
 - a. To add the Authentication Link to your custom email templates, add **[Link]** in the email.
4. Navigate to Plaid Hero Admin page
5. Under Authentication section, you can pick the email template that you want for Authorization Email Template and Re-authorization Email Template



6. Pick the email templates as your desire.

UPDATE ORG-WIDE EMAILS.

1. In Setup, navigate to **Organization-Wide Addresses**.



2. Add emails you want to use to send out authentication email.

Organization-Wide Email Addresses			Add
Actions	Display Name	Email Address	
Edit Del	PlaidHero	hello@cloudsquare.io	
Edit Del	test org wide	jeff@cloudsquare.io	
Edit Del	Fundingly Connect	connect@fundingly.com	
Edit Del	Huey	huey@cloudsquare.io	

3. Navigate to the Plaid Hero Admin page
4. Under Authorization Email Sender's Address, you can select the email you want to send out email.

Company Name ⓘ

Cloudsquare

Public Site Url

<https://plaidhero-dev-ed-developer-edition.na91.force.com/>

Authorization Email Sender's Address

PlaidHero(hello@cloudsquare.io) ▼

--None--

✓ PlaidHero(hello@cloudsquare.io)

test org wide(jeff@cloudsquare.io)

Fundingly Connect(connect@fundingly.com)

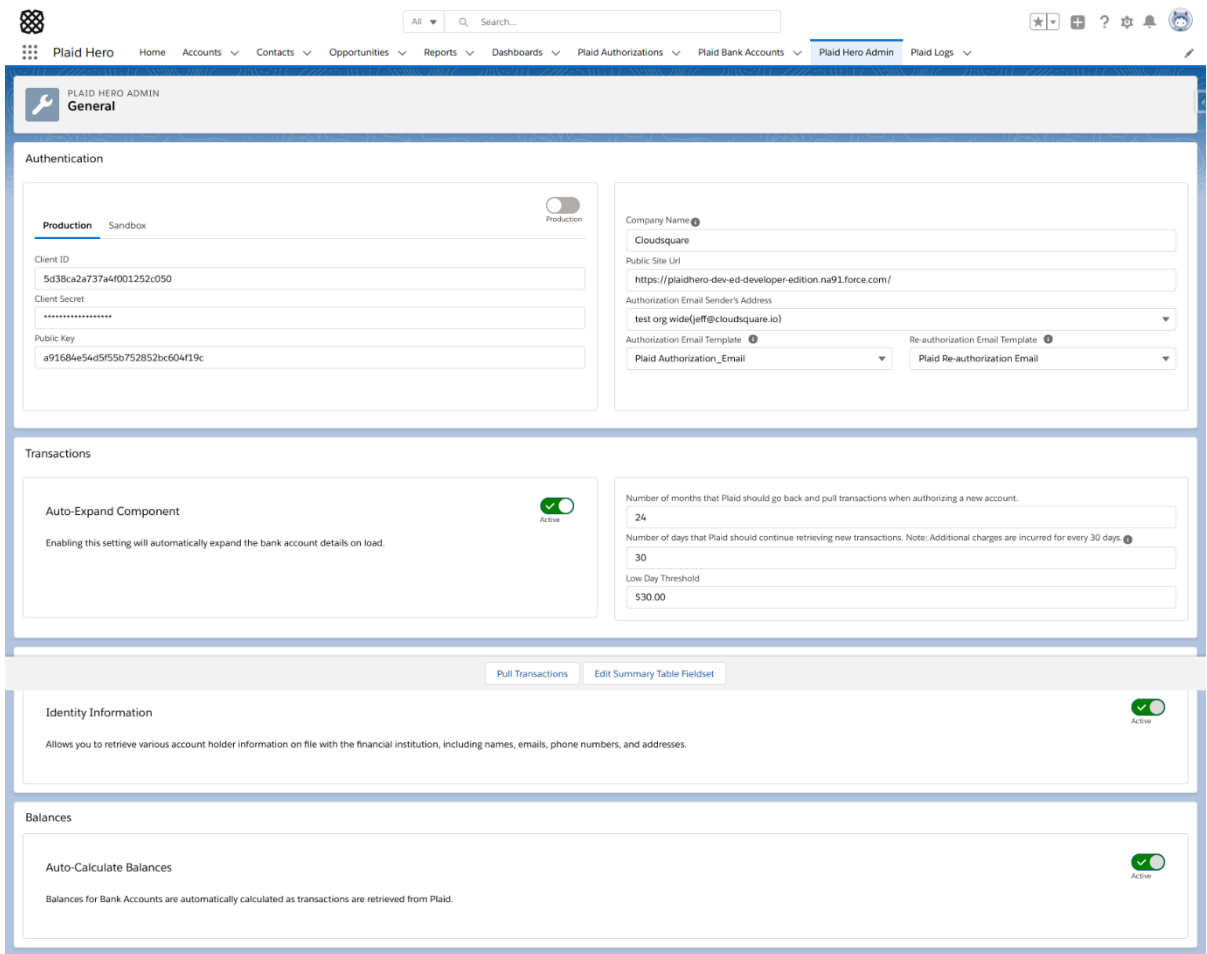
Huey(huey@cloudsquare.io)

CONFIGURATIONS

PLAID HERO APP

After installing the package:

- Access the App Launcher by clicking () symbol at the top left corner and selecting **Plaid Hero** app.
- Select **Plaid Hero Admin** tab



The screenshot shows the Plaid Hero Admin configuration page. The top navigation bar includes a search bar and several tabs: Home, Accounts, Contacts, Opportunities, Reports, Dashboards, Plaid Authorizations, Plaid Bank Accounts, Plaid Hero Admin (selected), and Plaid Logs. The main content area is titled "PLAID HERO ADMIN General" and is divided into three sections: Authentication, Transactions, and Balances.

Authentication

Production ☒ Sandbox

Client ID: 5d38ca2a737a4f001252c050

Client Secret: *****

Public Key: a91684e54d5f55b752852bc604f19c

Company Name: Cloudsquare

Public Site Url: https://plaidhero-dev-ed-developer-edition.na91.force.com/

Authorization Email Sender's Address: test.org.wide(jeff@cloudsquare.io)

Authorization Email Template: Plaid Authorization_Email

Re-authorization Email Template: Plaid Re-authorization_Email

Transactions

Auto-Expand Component ☒ Active

Enabling this setting will automatically expand the bank account details on load.

Number of months that Plaid should go back and pull transactions when authorizing a new account: 24

Number of days that Plaid should continue retrieving new transactions. Note: Additional charges are incurred for every 30 days: 30

Low Day Threshold: \$30.00

Identity Information ☒ Active

Allows you to retrieve various account holder information on file with the financial institution, including names, emails, phone numbers, and addresses.

Balances

Auto-Calculate Balances ☒ Active

Balances for Bank Accounts are automatically calculated as transactions are retrieved from Plaid.

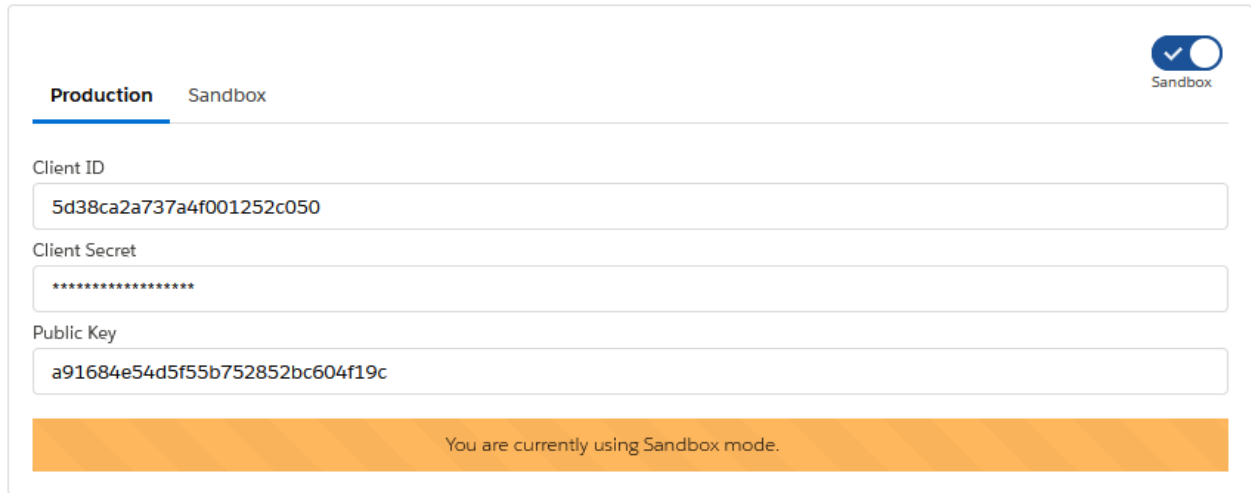
AUTHENTICATION

Authentication Information is required in order to use Plaid Hero package

- **Switch Mode** – Switch between Production and Sandbox Mode



When switch to Sandbox mode you will see **You are currently using Sandbox mode** under **Public Key**



Production **Sandbox**

Client ID

5d38ca2a737a4f001252c050

Client Secret

Public Key

a91684e54d5f55b752852bc604f19c

You are currently using Sandbox mode.

- **Production** **Sandbox** – Production and Sandbox information tab
- **Client ID / Sandbox Client ID** - private API keys; used in conjunction with an access_token to access data for an Item (Plaid Authorization)
- **Client Secret / Sandbox Client Secret** - private API keys; used in conjunction with an access_token to access data for an Item (Plaid Authorization)
- **Public Key / Sandbox Public Key** - a public API identifier; used to initialize Link

Company Name ⓘ	Cloudsquare
Public Site Url	https://plaidhero-dev-ed-developer-edition.na91.force.com/
Authorization Email Sender's Address	test org wide(jeff@cloudsquare.io)
Authorization Email Template ⓘ	Re-authorization Email Template ⓘ
Plaid Authorization_Email	Plaid Re-authorization Email

- **Company Name** - Your company name will appear when users are asked to link their bank account.
- **Public Site Url** - Salesforce Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password.
- **Authorization Email Sender's Address** - Salesforce allows you to share a common email alias. If this is configured every email that Plaid Hero sends will be from the configured email.
- **Authorization Email Template** - Provide quick access to select authorization email template.
- **Re-authorization Email Template** - Provide quick access to edit re-authorization email template.

USING YOUR PLAID ACCOUNT

Head over to <https://dashboard.plaid.com/> login to your account

- Click on **Team Settings** -> **Keys**

Overview Activity Support Customize **Team Settings**

TED

id ! Welcome to Plaid

a path below to begin building with Plaid

FREE 100 FREE

nk Account Live Bank Accounts • 55 remain

- Company
- Application
- Keys**
- API
- Members
- Integrations
- Sandbox BETA

- Fill out your **Authentication** with **client_id**, **public_key**, and **Secrets**

Production

Sandbox

Client ID

5d38ca2a737a4f001252c050

Client Secret

Public Key

a91684e54d5f55b752852bc604f19c

Production

Sandbox

Sandbox Client ID

5d38ca2a737a4f001252c050

Sandbox Client Secret

Sandbox Public Key

a91684e54d5f55b752852bc604f19c

You are currently using Sandbox mode.



cloudsquare

Keys

[Learn more in the docs](#) >

client_id

5d38ca2a737a4f001252c050



public_key

a91684e54d5f55b752852bc604f19c



 An integration upgrade is ready

As of July 23, 2020, the `public_key` is no longer used for new implementations of Link. View our [migration guide](#) to upgrade to `link_tokens`. Once you've upgraded, head over to [API settings](#) to ensure your `public_key` is no longer being used. You can also view our [maintenance guide](#) to troubleshoot any `public_key` issues before you upgrade.

Secrets

Development 1

Sandbox  1

Request Production access

7+ day approval

Request access

TRANSACTIONS

Transactions is used to pull banking information. You can change the setting to see more detail of the transactions, when to pull the transactions and for how long.

- **Auto-Expand Component** - Enabling this will auto-expand the Plaid Hero Summary in the Contact/Opportunity Plaid Hero tab.

Auto-Expand Component

Enabling this setting will automatically expand the bank account details on load.


Active

- **Number of months** - Required: Number of months that Plaid should go back and pull transactions when authorizing a new account.
- **Number of days** - Required: Number of days that Plaid should continue retrieving new transactions. Note: Additional charges are incurred for every 30 days. This can be adjusted manually by changing the End Date on the desired Plaid Authorization record.
- **Low Day Threshold** - The threshold for an account balance that Plaid will utilize to calculate the number of low balance days.

Number of months that Plaid should go back and pull transactions when authorizing a new account.

6

Number of days that Plaid should continue retrieving new transactions. Note: Additional charges are incurred for every 30 days. ⓘ

90

Low Day Threshold

IDENTITY

Identity is optional; it allows you to retrieve various account holder information on file with the financial institution, including names, emails, phone numbers, and addresses.

Identity

Identity Information



Active

Allows you to retrieve various account holder information on file with the financial institution, including names, emails, phone numbers, and addresses.

- **Identity Information:** this ensures the identity information provided by the client matches with the Identity information related to the Bank Account.
 - This information is provided in the Plaid Hero Summary component that you will place on your desired object ([Link](#)).
 - Simply hover over the “Identity” button and a modal will appear with the captured information.



Contact
Mr. Jason Strickland


Title

VP, Facilities

Account Name

[Burlington Textiles Corp of America](#)

Phone (2) ▼

(312) 596-1000

Related



▼ Jason St

▼ Chase

▼ [Total](#)

Names:

Alberta Bobbeth Charleson

Addresses:

2992 Cameron Road, Malakoff, NY (Primary)

2493 Leisure Lane, San Matias, CA

Emails:

accountholder0@example.com (Primary)

accountholder1@example.com (Secondary)

extraordinarily.long.email.username.123456@real

lylonghostname.com (Other)

Phones:

1112223333 (Home)

1112224444 (Work)

1112225555 (Mobile1)

Identity	Avail Balance	Type
	\$36,083.40	Checking

BALANCES

Balances is for Bank Accounts and using the automation to calculate as transactions are retrieved from Plaid.

Balances

Auto-Calculate Balances

Balances for Bank Accounts are automatically calculated as transactions are retrieved from Plaid.

Active

- The initial sync will show the balances of the previous months requested.
- As new transaction information is pulled or retrieved the Summary will update the Plaid Hero

Identity	Curr Bal	Pend Trans	Avail Bal	Type	Account	Routing	Last Updated Date		
	\$110.00	\$0.00	\$110.00	Checking	111122223333...	011401533	1/12/2020, 8:20 PM		

	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal	
Average	\$115.79	4.77	\$461.54	0.92	0	26.85	0	-\$2,116.47	-\$1,745.22	
1-2020	\$89.40	1	\$0.00	0	0	1	0	\$110.00	\$110.00	
12-2019	\$117.46	5	\$500.00	1	0	14	0	-\$272.54	\$199.40	
11-2019	\$117.46	5	\$500.00	1	0	30	0	-\$655.08	-\$183.14	
10-2019	\$123.79	6	\$500.00	1	0	31	0	-\$948.22	-\$565.68	
9-2019	\$117.46	5	\$500.00	1	0	30	0	-\$1,330.76	-\$941.89	
8-2019	\$117.46	5	\$500.00	1	0	31	0	-\$1,713.30	-\$1,324.43	
7-2019	\$117.46	5	\$500.00	1	0	31	0	-\$2,095.84	-\$1,706.97	
6-2019	\$117.46	5	\$500.00	1	0	30	0	-\$2,478.38	-\$2,089.51	
5-2019	\$117.46	5	\$500.00	1	0	31	0	-\$2,860.92	-\$2,472.05	

BUTTONS

- **Pull Transactions** - Initialize the process of pulling transactions for each Plaid Authorization with Sync Transactions checked. This should be used only if there were problems with the automatic transaction pull.
- **Edit Summary Table Fieldset** - Provide quick access to edit which columns should be visible on the Summary Table. This is the Summary Table the user will see when viewing the Plaid Hero component on the Contact and/or Opportunity record page.

 PLAID HERO ADMIN
General

Authentication

Client ID

5ccf325c79118c001287ee07

Client Secret

Public Key

131cc52f837b8595143916f5b3da7a

Company Name

Cloudsquare

API Url

https://development.plaid.com

Public Site Url

https://plaidhero-dev-ed-developer-edition.na91.force.com/

Transactions

Parse Transaction Data

 Active

Enabling this setting will store the data in Salesforce as Transaction records.

Number of months that Plaid should go back and pull transactions when authorizing a new account.

6

Number of days that Plaid should continue retrieving new transactions. Note: Additional charges are incurred for every 30 days.

90

Low Day Threshold

Identity

Pull Transactions

Edit Summary Table Fieldset

EMBED PLAID HERO AUTHENTICATION PROCESS IN YOUR WEBSITE

- Plaid Hero allows you to embed the authentication page in your website so that it can become part of your process.
- In order to take advantage of this functionality first you need to copy your **Public Site URL**.
- The format of the URL is as follows:

Public Site Url/?contactId={contactID}&accountId={accountId}&returnUrl={returnUrl}

- For example, if your **Public Site Url** is <https://salesforce.com> and you want to start the authentication process for an Account with ID 0014P0000279P8cQAE and a Contact with ID 0034P00002TrobtQAB the url would look like this:

<https://salesforce.com/?contactId=0034P00002TrobtQAB&accountId=0014P0000279P8cQAE>

URL PARAMETERS:

- **contactId** - *Required*: Salesforce ID of the contact that you want to start the authentication process for
- **accountId** - *Required*: Salesforce ID of the account that you want to start the authentication process for
- **returnUrl** - *Optional*: After successful authentication, the user will be redirected to the url provided by this parameter.

USER GUIDE

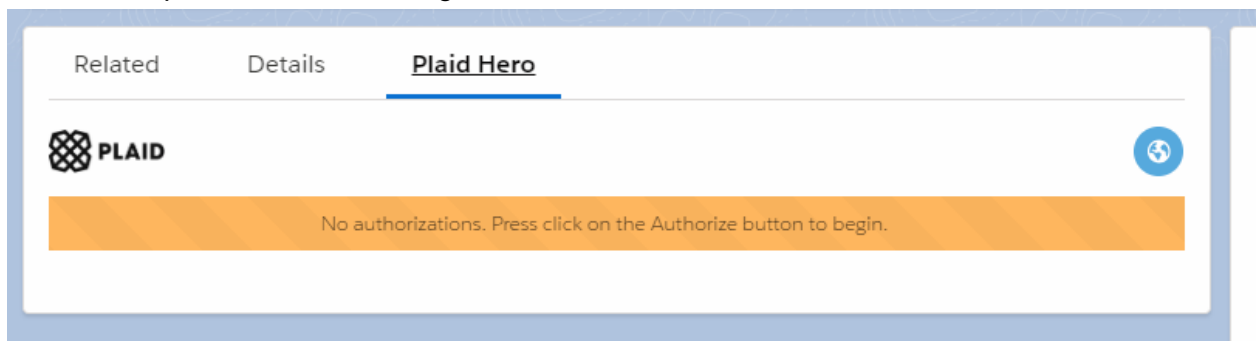
USING PLAID HERO APP

AUTHORIZE CONTACT(S)

Now you are ready to start using the application and retrieve your first set of banking information. The authorization can be initiated from either the Contact or Opportunity record.

SENDING AUTHORIZATION EMAIL

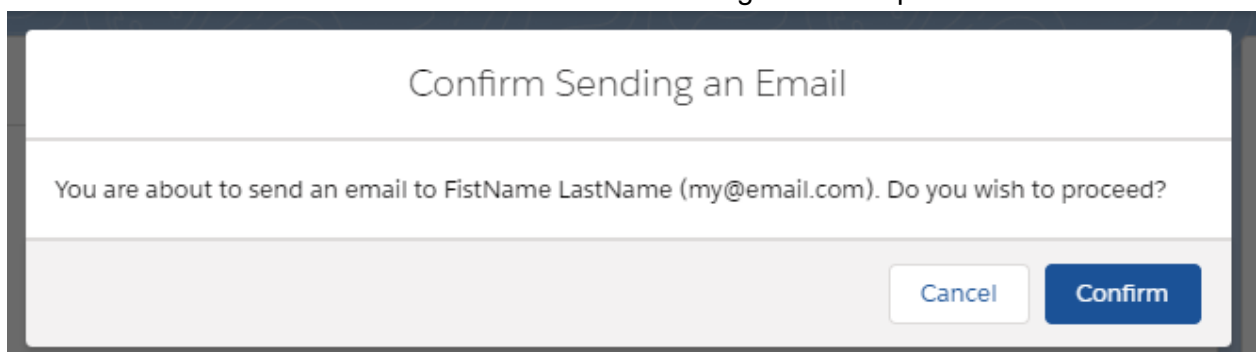
- Navigate to the Contact or Opportunity record you would like to Authorize and click on the newly created tab.
- To start the process, click on the globe icon.



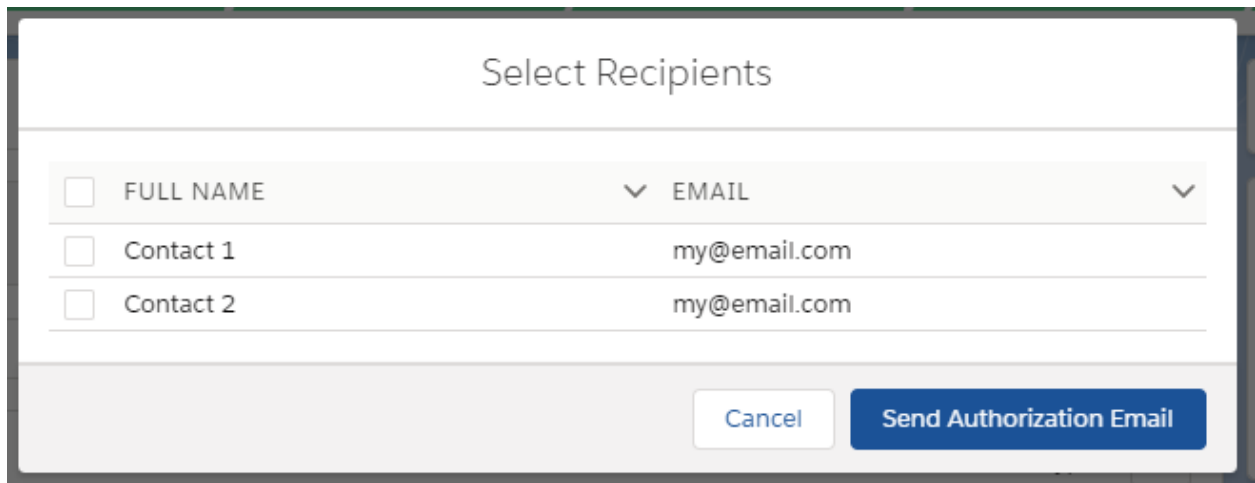
Authorize - This is where the magic starts and this sends an authorization email to the contact on the contact record or will provide a list of all the contacts on the account related to the opportunity record, from which you can choose one or many.

- **Contact Record:**

- After click on the globe icon, a confirmation window appears to confirm the information is correct before continuing to next step



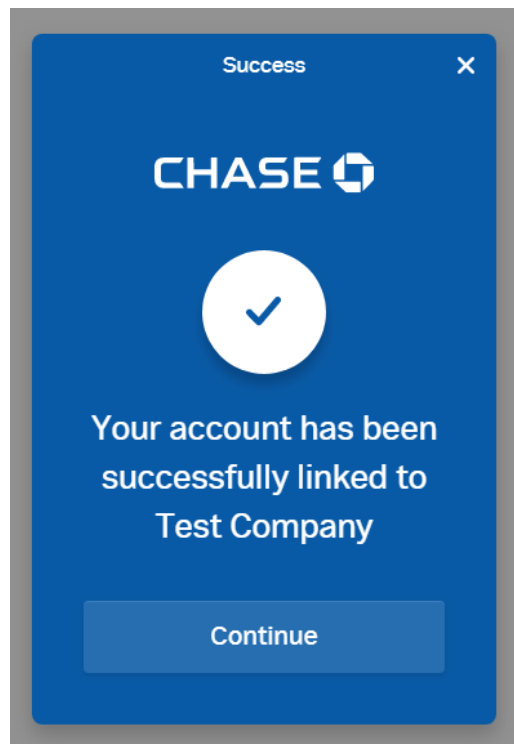
- **On Opportunity Record:**
 - When request an authorization from an Opportunity Record, you have the option to choose whom you would like to send an authorization email.
 - These contacts from the account and related to the opportunity
 - The window included a list of all related contacts to this opportunity
 - Simply select the checkbox on which contacts you want to send the email
 - You can send email to multiple contacts



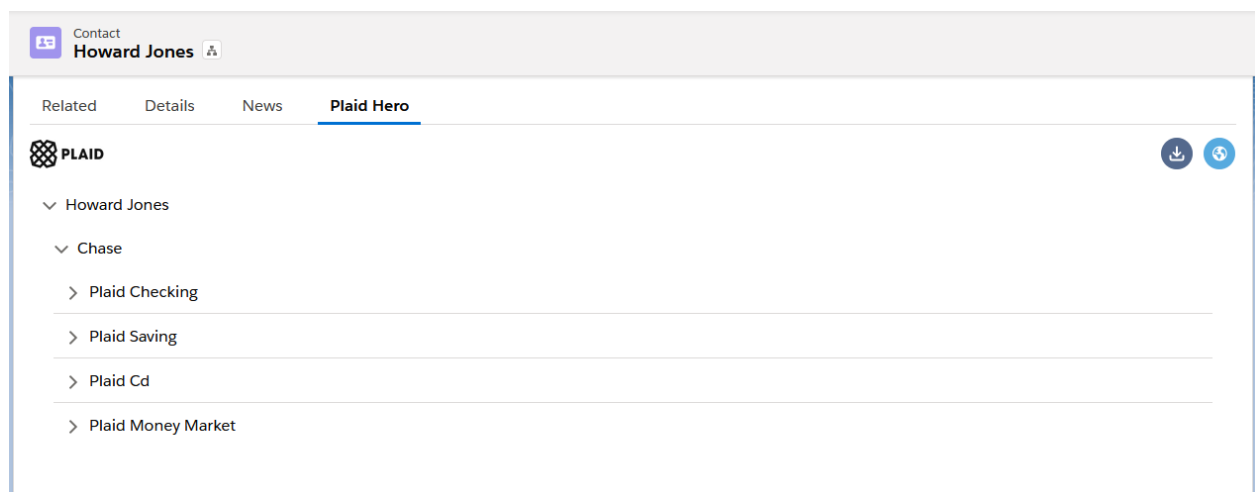
☐ FULL NAME	EMAIL
☐ Contact 1	my@email.com
☐ Contact 2	my@email.com

Cancel Send Authorization Email

- Once email is sent, the clients will receive a link in their email
- Simply click on the link to authorize their bank



- After the authorization, Plaid Hero will begin the process to pull all banking information of the clients



Contact

Howard Jones

Related

Details

News

Plaid Hero

PLAID

Howard Jones

Chase

Plaid Checking

Identity	Curr Bal	Pend Trans	Avail Bal	Type	Account	Routing	Last Updated Date	
0	\$110.00	\$0.00	\$110.00	Checking	*****0000	011401533	10/16/2020, 7:16 PM	

	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal
Average	\$117.21	4.96	\$500.00	1	29.64	29.64	0	-\$4,876.31	-\$4,493.52
10-2020	\$111.13	4	\$500.00	1	10	10	0	-\$288.87	\$100.00
9-2020	\$117.46	5	\$500.00	1	30	30	0	-\$671.41	-\$288.87
8-2020	\$117.46	5	\$500.00	1	31	31	0	-\$1,053.95	-\$671.41
7-2020	\$117.46	5	\$500.00	1	31	31	0	-\$1,436.49	-\$1,053.95
6-2020	\$117.46	5	\$500.00	1	30	30	0	-\$1,819.03	-\$1,436.49
5-2020	\$117.46	5	\$500.00	1	31	31	0	-\$2,201.57	-\$1,819.03

NOTE:

- The user is required to press the "Continue" button at the last step of the authentication process. Failing to do so will not be considered as a successful authentication.
- Plaid pulls bank information between 6 hours to about 24 hours after the transaction has been created.

SENDING RE-AUTHORIZATION EMAIL

In case of error or expired credentials you can ask the use to re-authorize.

- Navigate to the summary component.
- Identify which contact you want to re-authorize
 - Under the bank account click the three dots on the right side of the table.
 - Click the Re-authenticate button.

▼ Plaid Checking

Identity	Curr Bal	Pend Trans	Avail Bal	Type	Account	Routing	Last Updated Date		
	\$110.00	\$0.00	\$110.00	Checking	1111222233330000	011401533	1/14/2020, 11:24 AM		
	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal
Average	\$117.04	4.92	\$500.00	1	0	26.85	0	-\$2,116.47	-\$1,745.22

...

View Bank Account

View Bank Authorization

Re-authenticate

PLAID HERO RECORDS/FIELDS

After a successful authorization, several records will be created to allow end-users to analyze the contact(s) banking information, to aid in making funding decisions. Transactions pulling should occur automatically after all data is gathered.

PLAID AUTHORIZATION

This record displays the basic high-level information of what is being requested.

- **Status:**
 - **Active** – Bank information is still being pulled.
 - **Lapsed** – Bank information is no longer being pulled. (If the “End Date” field is in the past, bank information will no longer be pulled).
 - **Deactivated** – The record synchronization has been manually turned off.
- **Start Date** – The first date that bank information was pulled
- **End Date** – The last date that bank information will be pulled
- **Total Transactions** – The total number of transactions that are related to the Bank Account from the *Start Date* to the *Current Date*
- **Error Field** – Display the reason the Status field is in the Lapsed Status



Plaid Authorization
PA-000006

Details	Bank Accounts	Identity Names	Identity Addresses	Identity Emails
Plaid Authorization PA-000006				Status Active
Contact Howard Jones				Start Date 10/1/2018
Account Acme				End Date 11/15/2020
Institution Name Chase				Total Transactions Count 397



Here the sample Plaid Authorization record page. On the right you will see the related Bank Account(s). In this example, there is only one, but in the case of more than one you would see the first three and if there were more it would display the amount and you would click “View All” to see a list of all of them.

Plaid Authorization
PA-000392

Details

Plaid Authorization
PA-000392

Contact
Jason Strickland

Account
Burlington Textiles Corp of America

Institution Name
Chase

Owner
Tsvetan Pitsev

Created By
Tsvetan Pitsev, 7/25/2019 2:23 AM

Status
Active

Start Date
1/1/2019

End Date
10/31/2019

Total Transactions Count
356

Error

Last Modified By
Cloudsquare, 7/25/2019 11:31 AM

Bank Accounts (1)

Total Checking
37,060.98

Available Balance
37,060.98

Type
depository

Subtype
Checking

Click here to go to related Bank Account

View All

BANK ACCOUNT

This page provides a summary of all the months that have been pulled and provides detailed information on the key information. Fields on this page are informational and cannot be edited.

Details	Bank Account Months	Transactions	Names	Addresses	Emails	Phones
Bank Account Name	Plaid Checking			Type	depository	
Plaid Authorization	PA-000999			Subtype	Checking	
Account	United Oil & Gas Corp.			Routing	011401533	
Contact	Stella Pavlova			Account Number	1111222233330000	
				Wire Routing	021000021	
▼ Balance Information						
Curr Balance	\$110.00			Last Update Date	1/12/2020 10:20 AM	
Pend Trans	\$0.00			Last Modified By	Automated Process, 1/12/2020 10:20 AM	
Avail Balance	\$110.00					
▼ Averages						
Average Debit \$	\$115.79			Average Debit #	4.77	
Average Credit \$	\$461.54			Average Credit #	0.92	
Average Deposit \$	\$0.00			Average Deposit #	0.00	
Average Beg Balance	-2,116.47			Average Low Days	0.00	
Average End Balance	-1,745.22			Average Neg Days	26.85	
				Average NSFs	0.00	
▼ Totals						
Total Debit \$	\$1,505.25			Total Debit #	62	
Total Credit \$	\$6,000.00			Total Credit #	12	
Total Deposit \$	\$0.00			Total Deposit #	0	
Total End Balance	(\$22,687.87)			Total Low Days	0	
Total Beg Balance	(\$27,514.12)			Total Neg Days	349	
				Total NSFs	0	
▼ System Information						
Account ID	Mra6273vwkC6G5bxJ55zHL1Gnn5qKpu99EonM			Created By	Automated Process, 1/12/2020 10:20 AM	

You will also have access to further detailed information related to this Bank Account through the related lists separated as tabs.

- **Bank Account Month** – List of all the months summary details about that month. You can choose the month you want to view by click on it to see more information.
- **Transactions** – List of every transaction related to this Bank Account during the period information has been pulled.
- **Names, Addresses, Email, Phones** – List with all the identity has been pulled.

BANK ACCOUNT MONTH

This provides a summary detail monthly of transactions for the bank account. None of the fields are editable.

Details

Bank Account Months

Transactions

Names

Addresses

Emails

Phones

Plaid Bank Account Months (12+)

12+ Items · Sorted by Year/Month · Updated a few seconds ago

Bank Account Month ...

Year/Month ↓

Beg Bal

End Bal

Debit \$

Debits #

Credit \$

Credits #

Last Mo...

Last Mo...

1

BAM-053224

2020/06

\$22,792.02

\$9,560.55

\$54,365.14

24

\$38,052.50

11

6/25/2020 ...

Automated ...

2

BAM-053230

2020/05

\$28,688.91

\$22,792.02

\$542,971.99

20

\$537,075.10

17

6/25/2020 ...

Automated ...

3

BAM-053234

2020/04

\$35,118.59

\$28,688.91

\$45,574.14

17

\$39,144.46

18

6/25/2020 ...

Automated ...

4

BAM-053241

2020/03

\$24,298.50

\$35,118.59

\$34,689.91

24

\$45,510.00

25

6/25/2020 ...

Automated ...

5

BAM-053249

2020/02

\$40,264.61

\$24,298.50

\$65,381.81

19

\$49,415.70

29

6/25/2020 ...

Automated ...

6

BAM-053257

2020/01

\$36,011.34

\$40,264.61

\$38,668.13

23

\$42,921.40

13

6/25/2020 ...

Automated ...

7

BAM-053262

2019/12

\$29,991.43

\$36,011.34

\$77,134.19

30

\$83,154.10

19

6/25/2020 ...

Automated ...

8

BAM-053269

2019/11

\$18,200.24

\$29,991.43

\$35,558.81

20

\$47,350.00

8

6/25/2020 ...

Automated ...

9

BAM-053275

2019/10

\$59,709.58

\$18,200.24

\$104,113.34

30

\$62,604.00

14

6/25/2020 ...

Automated ...

10

BAM-053284

2019/09

\$56,509.01

\$59,709.58

\$12,144.43

20

\$15,345.00

11

6/25/2020 ...

Automated ...

11

BAM-053287

2019/08

\$47,040.38

\$56,509.01

\$71,016.87

27

\$80,485.50

18

6/25/2020 ...

Automated ...

12

BAM-053297

2019/07

\$21,955.39

\$47,040.38

\$12,392.51

22

\$37,477.50

13

6/25/2020 ...

Automated ...

- To see all the Transactions of specific month. Simply click on Bank Account Month to view.
- This will redirect you to the record and you can view individual Transaction (More on this here)

SUMMARY COMPONENT

Summary component allows you to quickly check all key metrics for given Contact/Opportunity.

- The information is grouped by:
Contact -> Institution -> Bank Account.

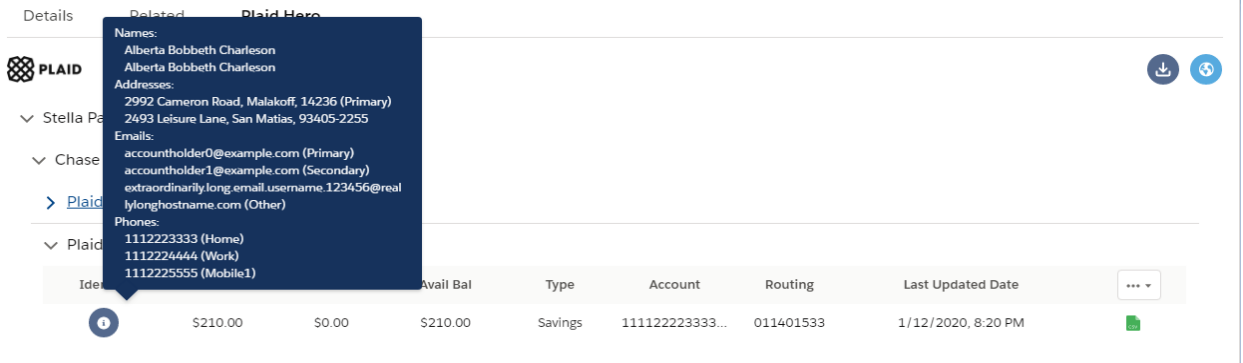
▼ Stella Pavlova

▼ Chase

▼ Plaid Checking

Identity	Curr Bal	Pend Trans	Avail Bal	Type	Account	Routing	Last Updated Date	...
	\$110.00	\$0.00	\$110.00	Checking	111122223333...	011401533	1/12/2020, 8:20 PM	

- The information in the component will be automatically expanded if [Auto-Expand Component](#) option is enabled.
- Hovering over the Identity icon will show you the collected Identity information if the module is enabled.



Details Related Plaid Hero

PLAID

Names:
Alberta Bobbeth Charleson
Alberta Bobbeth Charleson

Addresses:
2992 Cameron Road, Malakoff, 14236 (Primary)
2493 Leisure Lane, San Matias, 93405-2255

Emails:
accountholder0@example.com (Primary)
accountholder1@example.com (Secondary)
extraordinarilylongemailusername.123456@real
lylonghostname.com (Other)

Phones:
1112223333 (Home)
1112224444 (Work)
1112225555 (Mobile1)

Iden	Avail Bal	Type	Account	Routing	Last Updated Date	
\$210.00	\$0.00	\$210.00	Savings	111122223333...	011401533	1/12/2020, 8:20 PM

- If there is an error with the authentication. The identity icon is replaced by a Status icon. Hovering over that status icon will show you more information about the error.

Plaid Checking

Stat Authentication is required.

Stat	Avail Bal	Type	Account	Routing	Last Updated Date	
\$110.00	\$0.00	\$110.00	Checking	111122223333...	011401533	1/12/2020, 8:22 PM

	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal
Average	\$115.79	4.77	\$461.54	0.92	0	26.85	0	-\$2,116.47	-\$1,745.22

- For every bank account the information is summarized by month.

	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal
Average	\$115.79	4.77	\$461.54	0.92	0	26.85	0	-\$2,116.47	-\$1,745.22
1-2020	\$89.40	1	\$0.00	0	0	1	0	\$110.00	\$110.00
12-2019	\$117.46	5	\$500.00	1	0	14	0	-\$272.54	\$199.40
11-2019	\$117.46	5	\$500.00	1	0	30	0	-\$655.08	-\$183.14
10-2019	\$123.79	6	\$500.00	1	0	31	0	-\$948.22	-\$565.68
9-2019	\$117.46	5	\$500.00	1	0	30	0	-\$1,330.76	-\$941.89
8-2019	\$117.46	5	\$500.00	1	0	31	0	-\$1,713.30	-\$1,324.43
7-2019	\$117.46	5	\$500.00	1	0	31	0	-\$2,095.84	-\$1,706.97
6-2019	\$117.46	5	\$500.00	1	0	30	0	-\$2,478.38	-\$2,089.51
5-2019	\$117.46	5	\$500.00	1	0	31	0	-\$2,860.92	-\$2,472.05

- The top row of the tables is average information based on all months for the selected bank account.

	Debit \$	Debits #	Credit \$	Credits #	Low Days	Neg Days	NSFs	Beg Bal	End Bal	
Average	\$115.79	4.77	\$461.54	0.92	0	26.85	0	-\$2,116.47	-\$1,745.22	
1-2020	\$89.40	1	\$0.00	0	0	1	0	\$110.00	\$110.00	

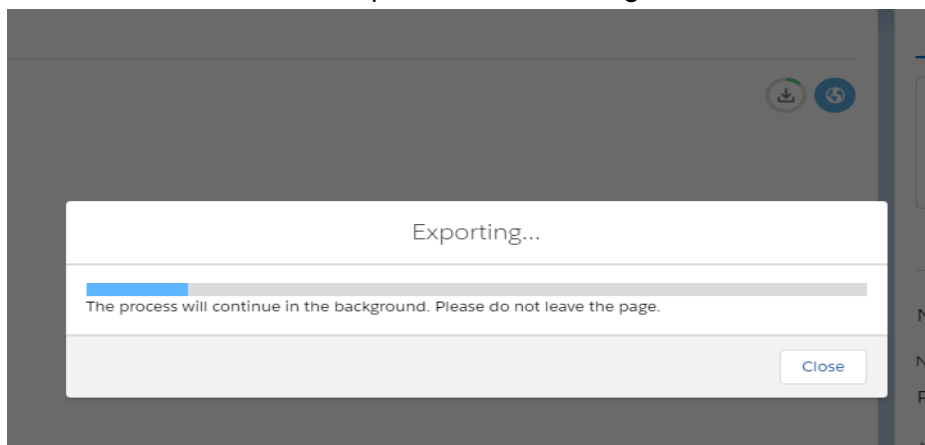
EXPORT TRANSACTIONS

This functionality is available in the Plaid Hero Summary Component and allows a user the ability to export all monthly transactions that are contained within the component or to export by individual month to a .csv file



Export All – This will allow user to export all transactions available in a CSV file.

- If clicked from a contact record it will get all transactions for that contact. If clicked from an opportunity record it will get all transactions for all contacts for that opportunity.
- A window will pop up to show you the progress when after clicked **Export All**. You can close the window to run the process in the background.



- You can also check the process by the progress circle around the button.

This button is controlled by a Custom Permission called “Export”. Profiles that have this will be able to use this feature. Profiles without this permission will get an error message instead.



Export – This will allow user to export specific month in a CSV file with file name - “FirstName LastName BankAccountName Year Month.csv”

Related Details **Plaid Hero**

PLAID

Export All



Jason Strickland

Chase

Total Checking

Identity	Avail Balance	Type	Account	Routing	Wire Routing	Last Updated Date				
	\$37,060.98	Checking	*****3925	322271627		7/25/2019, 02:23 AM				
	Credit \$	Credits	Debit \$	Debits	Neg Days	NSFs	Low Days	Beg Balance	End Balance	Export Monthly
Average	\$13,563.36	35.86	\$16,381.12	14.29	0	0	0	\$18,563.75	\$16,182.80	
June - 2019	\$13,276.71	34	\$5,148.96	11	0	0	0	\$18,106.32	\$9,978.57	
July - 2019	\$9,367.08	28	\$35,779.49	12	0	0	0	\$9,978.57	\$0.00	
May - 2019	\$21,642.42	44	\$16,975.19	14	0	0	0	\$22,773.55	\$18,106.32	
April - 2019	\$14,432.77	48	\$12,199.02	15	0	0	0	\$25,007.30	\$22,773.55	
March - 2019	\$13,777.55	37	\$18,443.06	16	0	0	0	\$20,341.79	\$25,007.30	
February - 2019	\$10,726.23	37	\$13,995.92	19	0	0	0	\$17,072.10	\$20,341.79	
January - 2019	\$11,720.73	23	\$12,126.20	13	0	0	0	\$16,666.63	\$17,072.10	

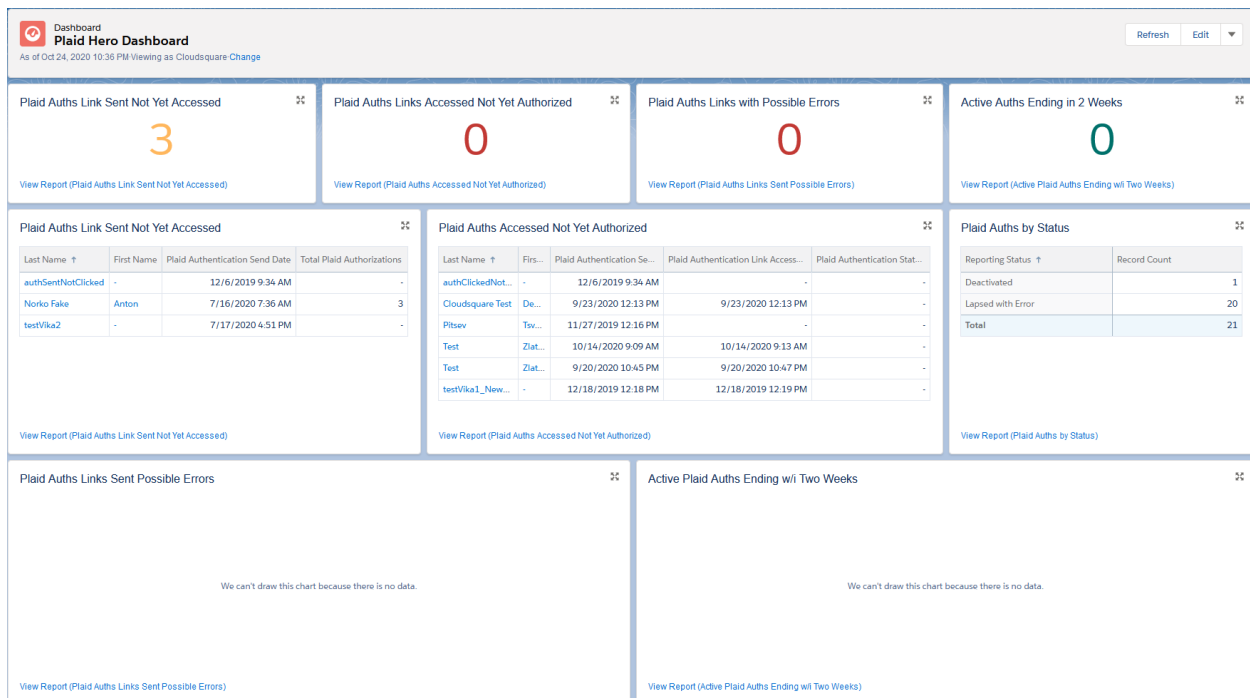
TRANSACTIONS

This provides details of the transaction, no field is available for editing, and this will only be available if set up by your admin.

Related	Details
Transaction Name Uber 072515 SF**POOL**	Bank Account Plaid Checking
Amount (\$6.33)	Bank Account Month BAM-039166
Date 1/4/2019	Account Owner
Pending ☐	ISO Currency Code USD
Running Balance (\$4,391.08)	Category Travel/nCar Service/nRide Share
Country	
Region	
Account ID Mra6Z73vwkC6G5bxJ55zHL1Gnn5qKpu99EonM	
▼ Payment Information	
Payee	Transaction Type special
Payer	Reason
Payment Method	Reference Number
Payment Processor	Transaction ID Mra6Z73vwkC6G5bxJ55zHL16bWJPeDc99EMXG
By Order Of	
▼ Address Information	
Address	City
State	Zip
Created By Automated Process , 1/12/2020 10:20 AM	Last Modified By Automated Process , 1/12/2020 10:20 AM

PLAID HERO DASHBOARD AND REPORTS

- Dashboards help you visually understand changing Plaid Hero data so you can make decisions based on the real-time data you have gathered with reports.
- The app comes with “Plaid Hero Dashboard” configured for you, so that you can monitor key metrics and take actions based on them.
- This dashboard is based on Plaid Hero reports. You can find all reports in the “Plaid Hero Reports” report folder.



DASHBOARD COMPONENTS

- **Plaid Auths Link Sent Not Yet Accessed** – Summarizes Contacts by Account that have not yet accessed the authorization link sent via email.
- **Plaid Auths Accessed Not Yet Authorized** – Summarizes Contacts by Account that have accessed the authorization link sent via email but have not yet completed the authorization, due to an error.
- **Plaid Auths Links Sent Possible Errors** – Summarizes Contacts by Account that may have ran into errors while authenticating.
- **Active Plaid Auths Ending w/i Two Weeks** – Summarizes Active Authorizations by Account by Contact that are expiring within the next two weeks.
- **Plaid Auths by Status** – Summarizes Authorizations by Status, Account, and Contact.