

# The Salesforce Banking Hub

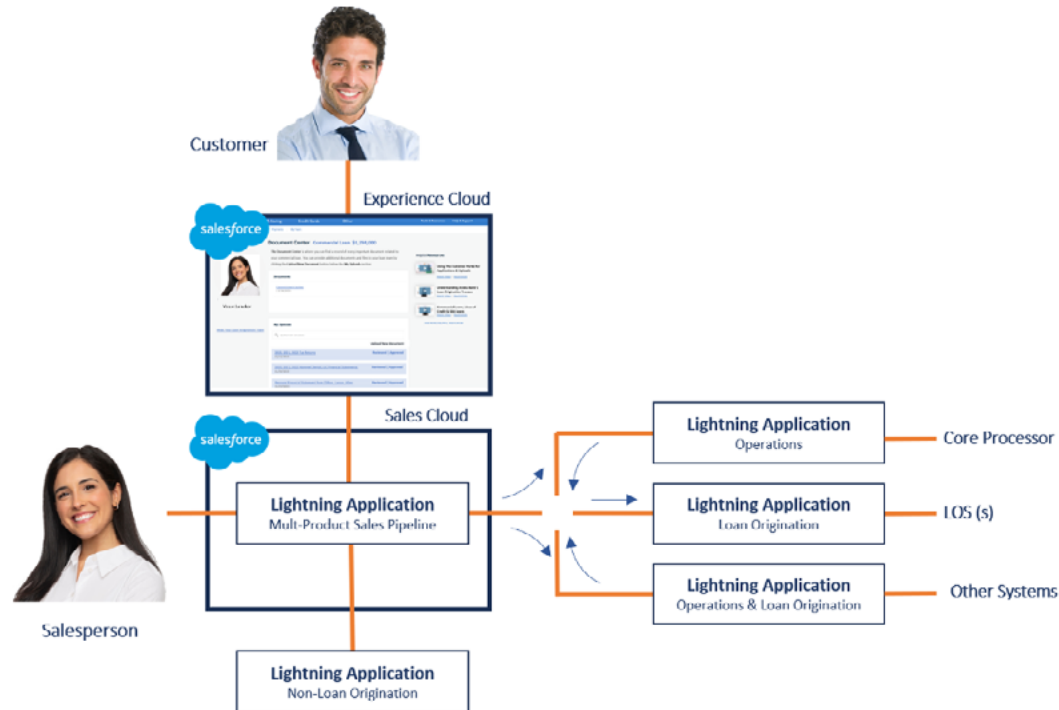
Turn your entire sales stack into one system!



# Imagine the Possibilities of One System

With The Salesforce Banking Hub, your sales stack will function as one system that includes:

- A **paperless and exceptionally easy experience** for both the borrower and lender with less data entry thus reducing human error.
- A **'single point of entry'** to one system that is guided, intuitive, and validated eliminating human error.
- **No toggling** between bank systems
- **No duplicate/dual data entry** with less data entry reducing human error.
- A **'guided & validated' experience** for all parties with real-time data checks ensuring accuracy, format, and attribution while reducing data entry errors.
- A **single point-of-data entry** for each user in sales, operations, support, loan origination, and your customer!
- **100% data reconciliation** across the entire sales stack with no data silos by using proprietary reconciliation algorithms designed by the highest performing banks.



100%

Data reconciliation across the entire sales stack with no data silos.

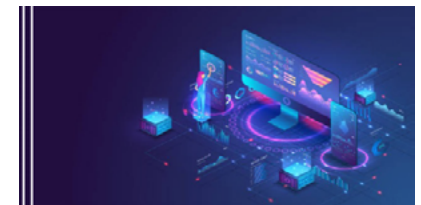
# An Exceptional 'Lightning Experience' Tailored for You

## A Lightning Platform for The Future

Lightning is simply a better option for banks, with an exceptionally easy interface with guided and validated data entry. It includes security features, pre-built bank process automation, and integrations with all popular core processors, most loan origination systems, and over 30 other bank systems. Additionally, the Salesforce Banking Hub uses proprietary data reconciliation algorithms to ensure a higher level of data quality for multiproduct pipelines, incentive compensation reports, portfolio management, reporting, and analytics.

## Modular and Customized for Your Bank

The Salesforce Banking Hub is a set of configurable Lightning Applications (a set of 'Lego-like' building blocks) including a hub that seamlessly integrates with core processors, loan origination systems, Microsoft Outlook, other CRM systems, data warehouses, data storage systems, and over 30 other banking systems. This approach saves time and money with very little organizational disruption during installation. The dynamic screen designs with customizable components provide bankers with a more tailored and responsive workspace, enabling them to adapt the system to their specific sales, operational, and loan origination workflows.



### A Library of pre-built API connectors for:

Salesforce | LOS | Microsoft Outlook  
Core Processor | Data Storage Systems  
other CRMs | 30+ Others

# One System Integration

## Focused on Data Quality

- **Lightning Data Entry** is guided and uses data validation rules to eliminate human error.
- **Proprietary Data Reconciliation Algorithms** ensure no data silos and data reconciliation across the entire sales stack.
- **Minimum Data Entry** (and no dual entry)
- **Relationship Mapping** for 100% portfolio management data attribution.
- **An 'Opportunity Credentials' Schema** tracks multiproduct opportunities (loan, deposits, cards, etc.) provides 100% attribution across the entire pipeline from Salesforce, customer portal, loan origination, non-loan origination, and the core processor. This schema provides 100% attribution for pipeline and incentive reporting.

## Integrating the Entire Sales Stack

The Salesforce Banking Hub is paperless and eliminates the need to grab paper from one system and entering that paper into another system. There is no 'togglng' between your Salesforce system, LOS, and core processor. There is a single data-entry-point for every user in the bank (sales, support, operations, and loan origination).

Additionally, the Salesforce Banking Hub provides a single Lightning connector with multiple end-points for each system in the sales stack.

100%

Portfolio management  
data attribution.

# Provide the Digital Experience Your Clients Expect

## Encrypted Client Data (PII)

Stay compliant with client interactions, messages, files and access. The Salesforce Banking Hub is SOC 2, Type 2 compliant.



## Configurable Just For Your Needs

The Salesforce Banking Hub is quickly configurable to meet your unique needs. The Salesforce Banking Hub uses modern Lightning Applications that are like customizable building blocks. This user-first approach is fast and affordable for large and small banks.

## API & Integrations

The Salesforce Banking Hub use a set of innovative Lightning Applications as configurable building blocks to meet each bank's needs – Multi-Product Pipelines, Loan Origination, and Non-Loan Origination. These Lightning Applications are configurable building blocks that integrate with all core processors, all popular loan origination systems (LOS), various storage systems (Google Drive, One Drive, Drop Box, Box), document management systems (like Medici, CSi), and over thirty other popular banking systems that may be in your sales stack.

Call us today for a quote:

**480-212-6082**

