

# Extending the Use of Salesforce into Loan Originations, KYC, Marketing and Analytics

Many financial firms have made Salesforce the go-to solution for customer relationship management (CRM). However, connecting Salesforce with the internal and external systems needed to execute complex risk analytics and decisioning is not easy. Banks, card issuers and fintech companies are forced to manually extract and duplicate data from Salesforce to complete required credit checks, risk scoring and due diligence processes using legacy systems.

Companies need a fast, simple way to connect Salesforce to their credit and lending decisioning processes. That's exactly what Provenir does with its pre-built integration adapter for Salesforce. The easily configured adapter integrates the Provenir Risk Decisioning Platform with Salesforce for seamless data exchange and real-time risk analytics and decisioning using a single data set. With the Provenir adapter, financial companies can quickly and easily automate complex analytics and decisioning processes for credit and loan applications - all from within their Salesforce environment.

## How Provenir Extends the Value of Salesforce

The combination of the Provenir adapter for Salesforce and [Provenir Risk Analytics and Decisioning Platform](#) can extend the value of Salesforce in multiple ways.

### Increase the Use of Salesforce CRM Data throughout the Organization

Provenir can extend the use of Salesforce data throughout the organization. The Provenir adapter orchestrates data exchange between Salesforce and other internal and external systems, such as legacy databases and third-party credit bureaus.

With Provenir's ability to listen for, read and write data into and out of Salesforce, organizations can eliminate manual work needed to move data from Salesforce to legacy systems. In addition, Provenir can enrich native Salesforce data with information maintained in other systems. For easy tracking, Provenir keeps a record of native and non-native data elements.



# Provenir Integration Adapter for Salesforce

## Use Salesforce for Loan Originations and Underwriting

Leveraging the Provenir integration adapter, organizations can use Salesforce to manage [loan originations](#) and underwriting.

Provenir can extract all of the data needed for decisioning from Salesforce and other systems within the Provenir platform. Using real-time risk analytics and decisioning capabilities, the platform can automatically decision an application and return the result to an originations interface within Salesforce. The platform includes the ability to [operationalize industry-standard risk models in minutes](#) and without any coding. This ensures decisioning is always using the most up-to-date risk models.

## Use Salesforce for KYC Compliance

Provenir makes it possible for organizations to manage [compliance with KYC, AML](#) and other regulations through Salesforce. Provenir can automatically extract all of the required data from internal systems, KYCnet and other external systems and make this available to a compliance interface built within Salesforce.

The Provenir platform can also orchestrate and simplify compliance from end-to-end. Capabilities such as business rules that ensure only the right data is aggregated for each client and automated workflow that identifies, verifies and validates the customer streamline the process.

## Use Salesforce for BI and Reporting

With the Provenir integration adapter, both structured and unstructured data can be used within Salesforce for on-demand analytics and reporting.

Provenir's integration adapter makes it equally easy to use Salesforce data within third-party BI solutions, such as Tableau. Data maintained in Salesforce can be automatically aggregated and shared with these BI solutions. In addition, Provenir integrates directly with Tableau, eliminating the need to duplicate Tableau templates in Salesforce before creating reports.

## Use Salesforce to Enhance Marketing Campaigns

The Provenir adapter helps companies leverage Salesforce data to improve their marketing and sales campaigns.

Relevant data in Salesforce can be easily shared with marketing systems to enrich understanding of the customer and create highly targeted campaigns and offers. Sales and marketing can also be improved directly within Salesforce, such as in-bound customer engagements, that leverage information aggregated from other systems to generate customer-specific, real-time offers.

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