

FINSYNC's PPP Lending Workflow

Starting by helping your customers apply for SBA's PPP Loan online and following through with additional tools and services, we are here to help you support your business customers in new and empowering ways.

New Lending Partner



Online Application & Lender's Portal

In minutes, get Your¹ own custom electronic loan application URL to host on Your own marketing website, for "Apply for Financing Online" links, and get Your own Lender's Portal for receiving applications online.



Pre-Approval

The business clicks "Apply for Financing" and is directed to complete their loan application online. The loan offered is determined based on PPP criteria and the results are automatically posted in Your Lender's Portal.



E-Signed Documents & Uploads

As part of the business submitting the loan application, electronic signatures are captured on required SBA documents, and the customer uploads required documents including proof of payroll costs and other forms.



Final Approval & SBA Boarding

You receive an email alert when all documents are ready for your final review, approval and boarding with the SBA.²



Automated Forgiveness Check & More

When the business applies, they sync their bank accounts. Keeping their bank accounts synced allows FINSYNC to automatically run reports on cash flow, forgiveness eligibility and help You and the business get in sync concerning further financing needs.³

- ¹ "You" and "Your" refer to your financial institution.
- ² As of 4/1/2020, the onboarding process is still to be determined. E-Tran is moving to Amazon Web Services and may publish a new API. FINSYNC will work with E-Tran or third parties to help provide the best possible experience.
- ³ Optionally, Your customer can continue to use FINSYNC for cash flow management, accounting, payroll and other services and You benefit with new non-interest income and a more efficient way to grow with Your customer long term.

Your business customers get a streamlined experience



Apply Online

We partnered with FINSYNC to help you apply online and receive other benefits. Once you have all your payroll data and supporting documents together, it can take less than 30 minutes to complete the process online.



Pre-Approval

FINSYNC's platform and calculators helps you confirm eligibility based on your business and payroll information and supporting documents. FINSYNC also provides access to trained advisors if you need help.



E-Signed Documents & Uploads

You will be granted access to a secure portal for signing documents electronically, uploading supporting documentation and expediting delivery of all necessary information to us.



Final Approval & Funding

After you complete your application through FINSYNC, we will review all your information as quickly as possible as part of final approval and funding. You will receive a direct deposit when your loan is approved.



Automated Forgiveness Check & More

After funding, you can continue using FINSYNC for free to track cash flow and loan forgiveness eligibility. You can optionally enable more features, operate more efficiently and track access to additional capital as your business grows.