

PLATFORM OVERVIEW

Credit Unions' CORE and LOS systems have stringent security for direct API access to import and transform data into HubSpot. While some vendors have access, it can be costly and access may be revoked. At WebStrategies, the preferred solution is using SFTP with a middleware ETL/ELT tool to connect to HubSpot.

Platform/System	Category	Purpose	Data Integration: SFTP via Middleware
Blend	Mortgage Tech/LOS	Digital mortgage origination	Yes
Bottomline	Core / Payments	Payments, cash management, fraud detection	Yes
CRIF	Consumer Lending	LOS and decisioning for consumer and small business loans	Yes
CUDL	Indirect Lending	Auto dealership financing integration	Yes
CUMA	Mortgage CUSO	Full-service mortgage solutions	Yes
Decision Assist	Consumer Lending	Automated underwriting/decisioning	Yes
Encompass	Mortgage Tech/LOS	End-to-end mortgage loan processing	Yes
FiServe	Core / Payments	Core banking, digital banking, payments	Yes
FiVision	Digital Services	Digital account opening	Yes
Homeowners Advantage	Mortgage CUSO	Mortgage origination and servicing	Yes
Lending360	Consumer Lending	Consumer/auto loan origination	Yes
Member First Mortgage	Mortgage CUSO	Mortgage origination, servicing, secondary market sales	Yes
MeridianLink	Mortgage Tech/LOS	Mortgage/consumer lending, digital account opening	Yes
MortgageBot	Mortgage Tech/LOS	Mortgage loan origination, member portal	Yes
Mortgage Click	Mortgage Tech/LOS	Front-end mortgage application portal	Yes
NetIt	Digital Services	Online banking tools and consulting	Yes
Velocity	Consumer Lending	Consumer/auto loan decisioning	Yes