

CUSTOMER STORY

Creating an Online Paycheck Protection Program Loan Application

With the launch of the [Paycheck Protection Program \(PPP\)](#), Tri Counties Bank needed a way to collect loan applications from customers quickly, without the time or cost of custom development. They used Forms for Salesforce and Documents for Salesforce to create an online PPP loan application in just one week, which helped deliver \$436.7 million in loans to businesses within the communities they serve.



Established in 1975, Tri Counties Bank is a wholly-owned subsidiary of TriCo Bancshares (NASDAQ:TCBK) headquartered in Chico, California. They provide a unique brand of customer service with solutions available in stand-alone and in-store bank branches in communities throughout Northern and Central California.

Industry	Customer Since
Banking	2018
Use Case	Products
Online Loan Application	Forms for Salesforce, Documents for Salesforce

Features
Conditional Logic, Salesforce Drag-and-Drop Form Builder, Document Automation

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Challenge

When Tri Counties Bank was awarded PPP loan funds to disperse, they began looking for a way to create an online loan application process that could collect hundreds of data points and easily integrate with their current systems. They needed to build an automated process that eliminate manual data entry, considering the time sensitivity of the project and the need to approve and originate loans quickly. The biggest challenge was finding a tool that required zero coding and could easily integrate data with Salesforce Financial Services Cloud through nCino.

\$436.7 million

in loans delivered by Tri Counties Bank to small businesses through the Paycheck Protection Program

Solution

Within one week, they were able to create a secure online PPP loan application using **Forms for Salesforce**. Thanks to the simple drag-and-drop interface, native capabilities, and ability to build off of Salesforce objects, the entire process was built within their Salesforce account—no mapping of fields, coding, or syncing of data needed. They also built loan documents within **Documents for Salesforce** to complete the process. Official documents were automatically generated using submitted form data and could be managed within their Salesforce account.

“

Formstack is a Swiss Army knife that helps me solve problems. When the challenge of quickly creating a digital PPP loan application came up, I was ready and didn't need an army of developers.



Todd McGregor

VP, Digital Platform Manager at
Tri Counties Bank

The Results



Launched a comprehensive PPP loan application process in one week



Originated and funded 2,908 loans totaling \$436.7 million



Completely automated the entire loan application process from data collection to documentation



Preserved 25,000+ jobs from businesses within the communities they serve



Created entire process and stored all data points within Salesforce



Saved countless hours by eliminating manual data entry and hard coding

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