Dreamforce 2026

Build Core Insurance Processes on Digital Insurance

Hands-On Workshop – Attendee Guide

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Disclaimer: This workshop uses a pre-configured Salesforce demonstration environment ("org"). The data, companies, people, and scenarios depicted in this guide are fictional and used for illustrative purposes only. Any resemblance to real persons, companies, or events is purely coincidental.

The features and functionality shown in this session reflect capabilities available at the time of Dreamforce 2026. Salesforce product capabilities, pricing, and availability are subject to change. This content does not constitute a binding commitment by Salesforce to deliver any feature, functionality, or enhancement.

Attendees explore and validate pre-staged configurations – this is not a from-scratch build session. Screenshots in this guide may differ slightly from what you see on screen due to org configuration or release updates.'

Session Overview

Session Title: Build Core Insurance Processes on Digital Insurance
LOB: Auto Insurance
Focus Area: Policy Administration, and Claims Service Agent
Abstract: Walk away with hands-on experience configuring core auto insurance processes on Digital Insurance – from policyholder 360 views and agentic product configuration, to policy issuance and AI-powered claims intake on a unified, customer-centric platform.
Duration: 60 Minutes
Format: Hands-on exploration in a pre-staged Salesforce org

Segment	Time (mins)
Welcome & Orientation	5
Digital Insurance Platform	5
Configuration using Claude	10
Module 1: Policy Management – Quote to Issuance	10
Module 2: Account 360 / Unified Policyholder View	10
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Welcome & Orientation (5 mins)

Welcome to the **Digital Insurance Hands-On Workshop** at Dreamforce 2026! Here's what this session will cover today: **transforming your Digital Insurance workflows** – and the tools to get you there:

- **Demo org** – a pre-staged Salesforce environment ready for you to explore
- **This workbook** – your step-by-step guide through every module

In this session, you will explore Salesforce's **Digital Insurance** – a purpose-built solution for auto insurers to modernize core operations across policy administration and claims management on a single, unified, customer-centric platform.
What to Expect:

- Your Salesforce org is **pre-staged** – no setup required from you
- You are here to **explore and validate**, not build from scratch
- Follow the steps in this guide at your own pace; facilitators are here to help
- Screenshots are provided as reference – your screen may vary slightly

Org Access: Your login credentials will be shared with you during the session. Please visit:https://orgfarm.salesforce.com/signup.

Having trouble logging in? Raise your hand and a facilitator will assist you. Do not spend more than 2 minutes on login – we want you exploring, not troubleshooting.

Scenario: Meet Cumulus Insurance

Cumulus Insurance is a mid-size regional insurer offering personal auto, home, and group benefits products. Like many insurers today, Cumulus is dealing with:

- Fragmented customer data spread across legacy policy and claims systems
- Claims adjusters spending too much time on manual intake and routing
- Reps struggling to get a complete view of a policyholder's history
- Growing demand for digital-first, self-service experiences from policyholders

Cumulus has chosen **Salesforce Digital Insurance** to unify their operations – from onboarding a policyholder and issuing a policy, to managing a claim end-to-end with AI-assisted service.

Your role: You are a Salesforce administrator and business analyst at Cumulus. You've been tasked with exploring the platform's capabilities across key areas before Cumulus's go-live. Let's get started.

Platform Orientation: Digital Insurance Architecture (5 mins)

Before diving in, let's orient ourselves to the Digital Insurance platform.
Salesforce **Digital Insurance** is built on Financial Services Cloud and brings together three core modules:

- **Policy Administration** – Manage the full policy lifecycle: quoting, issuance, endorsements, renewals, and cancellations
- **Claims Management** – Handle FNOL intake, adjuster assignment, investigation, and resolution – with AI at every step
- **Group Benefits** – Manage group plan setup, member enrollment, billing, and contract management for employer-sponsored benefits

All three modules share a **unified data model** centered on the policyholder – giving every team a single 360-degree view of the customer across products and interactions.

Digital Insurance Configuration Made Easy! (10 mins)

A Quick Look

Quick sneak peek at something we're actively building: **agentic configuration of insurance products and rules** using Claude Code, planned for eventual inclusion within the product itself.

The idea is that instead of navigating complex setup menus, admins could use Claude skills to build claims products, establish product relationships, define coverage rules, and support financials – all through a conversational AI interface.

What we're showing:

- A first look at Claude setup and connecting to a Salesforce org
- An early skills reference for insurance product configuration
- A glimpse of how product structure and coverage rules get defined
- Just how fast products and rules can come together with Claude, compared to manual setup

What you'll see

This is an early, behind the scenes, work-in-progress look. You'll see an Insurance Product being configured with Claude Code. Keep an eye out for:

1. How Claude interprets a plain-English product description and maps it to Digital Insurance's data model
2. How product relationships get established automatically
3. How supporting rules for financials and coverage verification get generated and applied
4. The speed difference – work that used to take hours is looking like minutes

✓ **Key Takeaway:** Agentforce doesn't just power customer-facing service – it can supercharge administrator productivity too. Claude skills make product configuration faster, more accurate, and accessible to non-developers.

Module 1: Policy Management — Quote to Issuance (15 mins)

Overview

Digital Insurance's **Policy Administration** module manages the full auto policy lifecycle. In this module, you'll explore a pre-configured quoting and issuance workflow – simulating the journey from an initial quote request through to policy issuance for an auto insurance customer.

The scenario: A new customer, **Jordan Lee**, has requested a quote for auto insurance. The quote has been generated and is awaiting issuance.

Step 1: Find the Quote

1. In the left navigation, click **Quotes**
2. Select the list view: **Workshop – Active Quotes**
3. Click into **Quote #QT-2026-00089 – Jordan Lee Auto**

Review the quote summary: coverage type, vehicle details, premium breakdown, and effective date.

Step 2: Review the Policy Configuration

1. Scroll to the **Coverage Details** section
2. Review the coverage lines: Liability, Collision, and Comprehensive
3. Click into **Collision Coverage** to review limits and deductibles
4. Click back to return to the quote

Step 3: Issue the Policy

1. Click the **Issue Policy** button (top right of the quote record)
2. Review the pre-populated policy details on the issuance screen
3. Confirm the **Effective Date** is set to today's date
4. Click **Confirm & Issue**

Salesforce creates the policy record and updates the quote status to **Issued**.

Step 4: Verify the New Policy

1. In the left navigation, click **Policies**
2. Select the list view: **Workshop – Recently Issued**
3. Confirm **Policy #AUTO-2026-00143 – Jordan Lee** appears with a status of **Active**

✓ **Checkpoint:** Is Jordan Lee's new policy showing as Active? If yes, you've completed Module 1.

Module 2: Account 360 / Unified Policyholder View (10 mins)

Overview

One of the biggest pain points for insurance teams is the lack of a unified view of the customer. Adjusters, agents, and service reps often work in separate systems and can't see the full picture. Digital Insurance solves this with **Account 360** – a single, consolidated policyholder profile that surfaces the **Product Catalog**, contacts, policies, claims history, and interactions in one view.
In this module, you will explore a pre-configured policyholder record for **Alex Rivera**, a Cumulus auto insurance customer with an active policy and an open claim.

Step 1: Navigate to the Account Record

1. Click the **App Launcher** (grid icon, top left)
2. Search for and select **Digital Insurance**
3. In the left navigation, click **Accounts**
4. From the list view, select **Alex Rivera**

> You are now on Alex's Account 360 page. Take a moment to explore what you see.

Step 2: Explore the Policyholder Profile

Review the following sections on Alex's account:

1. **Contact Details** – Verify Alex's contact information, preferred communication channel, and linked household members
2. **Product Catalog** – Review the insurance products associated with Alex's account
3. **Active Policies** – Note the active auto policy (Policy #: AUTO-2026-00142) and its status, effective date, and premium
4. **Claims History** – Review Alex's open claim (Claim #: CLM-2026-00387) – notice the claim type, date of loss, and current status
5. **Recent Interactions** – Scroll to the Activity timeline to see recent service interactions

Step 3:

1. Click into **Policy #AUTO-2026-00142**
2. Review the policy details page – note the coverage summary, insured vehicle, and renewal date
3. Click the **back arrow** to return to Alex's Account 360

✓ **Checkpoint:** Can you see Alex's open claim directly from their account page? If yes, you've successfully explored Account 360 and completed Module 2.

Module 3: Claims Service Agent with Agentforce (15 mins)

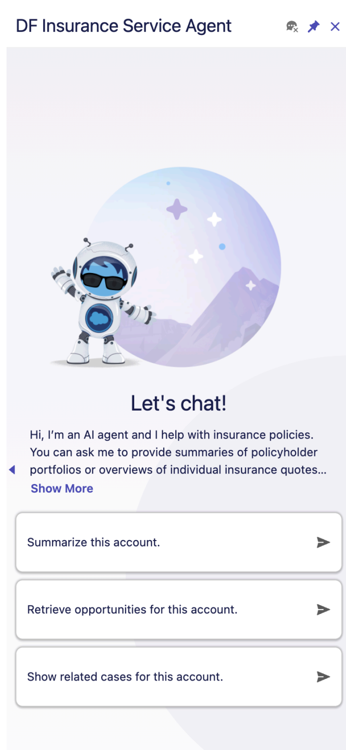
Overview

This is the highlight of today's session. Digital Insurance integrates **Agentforce** – Salesforce's agentic AI platform – directly into the claims workflow. The **Claims Service Agent** is a pre-configured AI agent that handles automated claims intake, triages incoming claims, and provides adjusters with an AI-generated case summary – without manual data entry.

You'll explore a pre-configured Claims Service Agent for Cumulus and see how it handles Alex Rivera's open claim

Step 1: Review the Insurance Service Agent

1. From Alex Rivera's account page, click on the age of force icon on the top right of the screen.
2. Click on Summarize this account:



Step 2: Try to create a claim

1. Ask the agent to create a claim.
    a. the agent may try to create a claim. This is a hallucination, but it's a good illustration of why we want to create guard rails in all of our employee-facing agents.
2. If the agent does try to create a claim, notice the questions it asks are very general of any insurance claim.

Now let's add in the financial services cloud, industry agent for claims intake, and see the difference in the claims intake process

Step 1: Navigate to the Insurance Service Agent

3. Click the **Setup** icon (gear, top right) and select **Setup**
4. In **Quick Find**, type **Agents** and select **Agents** under Einstein Generative AI → Agent Studio
5. Locate **Insurance Service Agent** and click to open it

Notice it is opening in the new Agentforce Builder UI. Review the agent's configuration: its purpose, connected data sources, and available actions.

Step 2: Create a new version of the agent

1. In the top right corner, click on **New Version**
    a. If you don't see **New Version** in the top right, you may need to save and commit the existing version of the agent.
    b. click **Save** and then click **Commit** The **New Version** button should show after that

Step 3: Review the Agent's Actions

2. In the Explore panel on the left side, hover over the Subagent header.
    a. You should see a + sign appear
3. Click the **+** to add a new sub agent
    a. Notice the options:
        i. Add from Asset Library
        ii. New Agent
4. Click **Add from Asset Library**
    a. The Asset Library contains out of the box assets that are delivered from Salesforce in addition to any new assets you create and add to the library
5. Search for 'claims' and select the **Claims Intake** asset
    a. Optional:Look at the details of the agent to see all of the actions that agent can take
6. Review the following pre-configured actions:
    a. **Summarize Open Claim** – Generates an AI summary of a claim's status for the adjuster
    b. **Triage Incoming FNOL** – Automatically categorizes and routes a new First Notice of Loss
    c. **Draft Customer Update** – Generates a draft status message to send to the policyholder
7. Click into **Summarize Open Claim** to review its configuration

Step 3: Activate + Test the Insurance Service Agent

Now that the claims intake sub agent is added, we can Save, Commit, and Activate the agent.

1. Click **Save**
2. Click **Commit**
3. Click **Activate**
4. Click the **Launch** button next to Cumulus Claims Service Agent
5. In the agent chat window that opens, type:

Step 4: See the FNOL Claim Intake In Action

1. Navigate back to the Alex Rivera account page
2. Open the insurance service agent
3. Click "Summarize open claim for Alex Rivera"
    a. Review the AI-generated response – note how it pulls claim details, status, and next steps automaticallyIn the same agent chat window, type.
4. In the same chat window, type:
    a. "I'd like to file a new claim for Alex Rivera"
5. Answer the agent's questions as it walks you through intake – incident date/time/location, point of impact and drivability, other parties involved, injuries, and whether a police report was filed
6. Confirm the derived claim details when prompted
7. Review the Claims tab – a new claim should appear with status Initial

✓ **Checkpoint:** Did the agent generate a claim summary for Alex Rivera? If yes, you've successfully explored Module 3.

Wrap-Up & Key Takeaways (5 mins)

Congratulations – you've explored the core of Salesforce Digital Insurance for Auto! Here are your **3 key takeaways** from today:

1. **Module 1: End-to-End Policy Management:** From quote evaluation to policy issuance, Digital Insurance streamlines the entire auto policy lifecycle on a single platform with zero data re-keying.
2. **Module 2: Unified Account 360 View:** Account 360 provides a single, consolidated profile for policyholders, bringing together product catalogs, active policies, open claims, and interaction timelines.
3. **Module 3: AI-Powered Insurance with Agentforce:** The Claims Service Agent automates instant claim summaries, and assists with employee communications to dramatically accelerate processing.

CTAs & Q&A

- **Download this workbook** for reference after the session
- **Supporting Documentation** – visit help.salesforce.com for Digital Insurance docs
- **Get in touch with your AE** to schedule a customized Digital Insurance demo or Proof of Concept for your organization
- **Share your feedback** – use the QR code at the front of the room to complete the session survey

UPDATING DECISION TABLES

- You may have to refresh a number of decision tables in order to get quoting to work. This can be labor intensive. Our product team has supplied instructions and a script to be able to move you through this easily:

With this script, there's no longer a need to manually refresh each decision table. Simply run the script, and it will handle the refresh tasks sequentially (It will refresh all ACTIVE decision tables.). This allows you the freedom to take a well-deserved break ☕. By the time you return, you'll find that all decision tables have been updated with the latest timestamp.

Instructions:

The script is designed to be user-friendly and does not require any additional information such as user credentials or org URLs–I've taken care of these details for you.

To use the script, follow these simple steps:

1. Navigate to the **Developer Console**.
2. Go to **Debug > Open Execute Anonymous Window**.
3. Paste the script and **Execute**

```
TypeScript
public class DecisionTableManager {
    private List<String> decisionTableNames;
    public DecisionTableManager() {
    }
    public void refreshDT() {
        // Endpoint for the refreshDecisionTable action
        String endpoint = URL.getOrgDomainURL().toExternalForm() +
'/services/data/v61.0/actions/standard/refreshDecisionTable';

        // Prepare the HttpRequest
        HttpRequest req = new HttpRequest();
        req.setEndpoint(endpoint);
        req.setMethod('POST');
        req.setHeader('Content-Type', 'application/json');
        req.setHeader('Authorization', 'Bearer ' + UserInfo.getSessionId());

        // Iterate over each Decision Table and make the call
        for (String dtName : this.decisionTableNames) {
            // Prepare the JSON body
            String body = JSON.serialize(new Map<String, Object>{
                'inputs' => new List<Object>{
                    new Map<String, String>{'decisionTableApiName' => dtName}
                }
            });
            req.setBody(body);
            // Make the callout
            try {
                Http http = new Http();
```

```
                HttpResponse res = http.send(req);

                // Check if the response is successful
                if (res.getStatusCode() != 200) {
                    // If the response is not successful, throw an exception
                    throw new DecisionTableRefreshException('Failed to refresh
Decision Table ' + dtName + '. Response Status: ' + res.getStatus() +'\n error is
' +res.getBody());
                }

                System.debug('Response for ' + dtName + ': ' + res.getBody());
            } catch (Exception e) {
                throw e; // Rethrow the exception to indicate failure
            }
        }
    }
    public void refreshAllDecisionTables() {
        // Query all Active Decision Tables for their Developer Names
        List<String> decisionTableNameslocal = new List<String>();
        for (DecisionTable dt : [SELECT DeveloperName FROM DecisionTable WHERE
Status = 'Active']) {
            decisionTableNameslocal.add(dt.DeveloperName);
        }
        this.decisionTableNames = decisionTableNameslocal;
    }
}
// Custom exception class, we can update it in future as needed
public class DecisionTableRefreshException extends Exception {}
// Initiate the refresh process
DecisionTableManager dTManager = new DecisionTableManager();
dTManager.refreshAllDecisionTables();
dTManager.refreshDT();
```

Q&A

Time for your questions! Facilitators are here – raise your hand or approach the stage.

Want to Learn More?

Trailhead

Explore Digital Insurance and Financial Services Cloud on Trailhead:

- Financial Services Cloud Basics
- Agentforce for Service
- Salesforce Certified Financial Services Cloud Accredited Professional

Documentation

- Digital Insurance Documentation
- Agentforce Developer Guide
- Financial Services Cloud Release Notes

Post-Dreamforce Resources

Want more hands-on time? Reach out to your Salesforce account team to schedule:

- A **Digital Insurance Discovery Workshop** tailored to your organization
- A **Technical Architecture Review** with our FSC Solution Engineers
- Access to the **Digital Insurance Trailhead Playground**