



Dreamforce 2026

Build AI Origination Live: An Interactive Experience

Thursday, Sep 17 | 10:00 AM - 11:00 AM PDT | Moscone West, L2, Room 2006

Hands-On Workshop – Attendee Guide



Table of Contents

1. Session Overview
2. Welcome & Orientation
3. Stage Management Configuration
4. Digital Origination in Claude
5. Peek into Roadmap
6. Treasury Services Design Thinking Workshop
7. Wrap-up & Key Takeaways
8. Want to Learn More?

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 AI Origination Live: An Interactive Experience

LOB: Account Origination & Treasury Services

Focus Area: Deposit Account Origination

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 and design thinking workshop

Segment	Time (mins)
Welcome	2
Digital Origination Platform Orientation	3
Stage Management Configuration - Hands-on	20
Digital Origination in Claude	5
Peek into Roadmap	5
Design Thinking Workshop	20
Wrap-Up & Q&A	5

Welcome & Orientation (5 mins)

Welcome to **Build AI Origination Live: An Interactive Experience!**

In this segment, we will introduce you to **Salesforce Digital Origination** (formerly called Digital Lending). You will learn how Salesforce combines Financial Services Cloud and Digital Origination into a single, unified platform to orchestrate every major financial product journey—from simple retail deposit accounts and credit cards to complex commercial loans and treasury management

The Next-Gen Architecture & Key Capabilities

Rather than relying on heavy custom coding, our modern, metadata-driven architecture is built for **drag-and-drop configuration**. During this orientation, we will cover the core capabilities that drive speed, efficiency, and compliance:

- **Unified Origination Layer**
- **Configurable Platform Services**
- **Out-of-the-Box Integrations**
- **Stage Management**

Segue to the Hands-On Demo

We will transition directly into our pre-staged Salesforce sandbox environment. There, you will take on the role of an administrator to configure live stages, add integration calls, and experience first-hand how simple it is to orchestrate complex origination processes without writing a single line of code.

Org Access: You'll receive login credentials at the venue.

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.

Stage Management Configuration (20 mins)

- Open your preferred web browser and sign in to your Salesforce environment
- Locate and select **Setup**, then proceed to **Stage Management**
- Execute the configuration steps as prompted by the on-screen instructions

Step 1:

- Within the Submitted stage, insert a Callout step. Name it as Initiate Credit Scoring, ensuring the integration references the `fetch_credit_report_details` definition.
- Commit your changes by clicking Save

Submitted stage

Step	Type	Integration / Flow
Review Data Completeness	AutoTask	Data_Completeness_and_Match_Checks flow
Review Data Match with Documents	AutoTask	Data_Completeness_and_Match_Checks flow
Review Identity Verification Results	AutoTask	Data_Completeness_and_Match_Checks flow
Initiate AML Screenings	Callout	onfidoCreateApplicant → OnfidoIDV stub
Initiate Credit Scoring	Callout	fetch_credit_report_details → EquifaxCreditStub
Initiate Collateral Valuation	Callout	Register_Collateral_Lien → EquifaxCreditStub

Initiate Collateral Due Diligence	Callout	Register_Collateral_Lien → EquifaxCreditStub
Initiate Credit Scoring	Integration Definition - Auto	fetch_credit_report_details → EquifaxCreditStub

Step 2:

- Within the In Review stage, insert a Manual Task step. Name it as Generate Credit Memorandum, ensuring the flow references the `Generate Credit Assessment Memo` flow definition.
- Commit your changes by clicking Save
- Publish the Stage Management Definition

In Review stage

Step	Type	Integration / Flow / OmniScript
Review AML Results	AutoTask	Data_Completeness_and_Match_Checks flow
Review Credit Report	AutoTask	Data_Completeness_and_Match_Checks flow
Categorize Fraud Risk	AutoTask	Data_Completeness_and_Match_Checks flow
Categorize Credit Risk	AutoTask	Data_Completeness_and_Match_Checks flow

Review Collateral Valuation Report	ManualTask	<i>(no UI component — plain task)</i>
Review Collateral Due Diligence Results	ManualTask	OmniScript DigitalLending_CollateralDCT_multiLanguage_3; conditional on CollateralValuationBRE
Review Tradelines	ManualTask	Flow TradelinesAndCreditReviewFlow ← created in this work
Review Affordability	ManualTask	OmniScript DigitalLending_AffordabilityReviewStub_English_1
Analyze Financial Ratios	AutoTask	Data_Completeness_and_Match_Checks flow
Generate Credit Assessment Memorandum	OmniScript	Generate_Contract OmniScript

Auto Approved / Underwriter Approved stages

Step	Type	Integration
Generate Approval Letter	ManualTask	Generate_Approval_Letter flow
Register/Register Lien for Collateral	Callout	Register_Collateral_Lien → EquifaxCreditStub
Application Approval	Milestone	—

Contract Generation stage

Step	Type	Integration
Generate Contract	ManualTask	Generate_Contract flow
Sign Contract	Callout	E_sign_Contract → BookToCoreStub
Share Contract for Signatures	ManualTask	—

Book to Core stage

Step	Type	Integration
Book to Core Banking System	Callout	Book_to_Core → BookToCoreStub

Digital Origination in Claude (5 mins)

In this segment, explore how AIforce with the power of Headless technology enables developers and administrators to configure and manage Digital Origination workflows directly from the different interfaces like Slack, Claude, Teams and others. Claudeforce is one such opportunity for developers to use Salesforce in Claude.

Through a live demo, see how plain-language requests are transformed into automated, API-driven process orchestrations right within the Claude interface, demonstrating the power of headless configuration and seamless integration with the Salesforce backend.

Peek into Roadmap (5 mins)

In this section, attendees will get an exclusive look at the upcoming roadmap for Salesforce Digital Origination, moving from currently available capabilities to the next big frontiers in financial services.

What's Next: Expanding the Sector Horizon

With Digital Origination for Lending, Retail Deposit, and Commercial Deposit already in place, Salesforce is officially expanding its strategic scope:

Explore our upcoming platform capabilities designed to hyper-automate workflows and ensure lifecycle compliance:

- **AI-Powered Document Management**
- **Ongoing Due Diligence & Monitoring**
- **Goal-Based & Role-Based Agents**
- **Multi-Agent Orchestration**

Treasury Services Origination (Upcoming): Transitioning beyond deposits to transform B2B treasury onboarding into a major driver of commercial growth. This upcoming feature digitizes complex cash management setup, merchant onboarding, and account keying workflows, allowing financial institutions to deliver highly personalized, high-touch commercial client experiences.

Treasury Services Design Thinking Workshop (20 mins)

In this hands-on design thinking session, attendees will collaborate to explore, prototype, and validate end-to-end Treasury Services Origination and fulfillment workflows. Participants will get an interactive look at core treasury management service origination product capabilities (roadmap) – while actively sharing feedback and co-creating solutions to help shape future platform capabilities and product priorities.

Wrap-Up & Key Takeaways (5 mins)

Congratulations – you've explored the core of Salesforce Digital Origination & Upcoming Treasury Services Origination! Here are your **3 key takeaways** from today:

1. **Unified Digital Origination:** A metadata-driven platform for lending, deposits, and treasury services.
2. **Low-Code Stage Management:** The ability to build complex, integrated origination workflows without custom coding.
3. **Future-Ready Innovation:** Our roadmap focus on AI-powered document management, multi-agent orchestration, and commercial treasury growth.

CTAs & Q&A

- **Download this workbook** for reference after the session
- **Supporting Documentation** – visit help.salesforce.com for Digital Origination docs
- **Get in touch with your AE** to schedule a customized Digital Origination 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

Q&A

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

Want to Learn More?

Resource	Link / Reference
Product Webpage	Digital Origination Product Page
Pricing Page	Digital Origination Pricing Page
Datasheet	FY27 Digital Origination Datasheet
Demo Video	Digital Origination Demo Video
Trailhead Badge	Fundamentals of Digital Origination for Lending
Notebook LM	Sources: Digital Origination - RFI, RFP and Product Decks
Help Documentation	Digital Origination Documentation (formerly called Digital Lending)
Developer Guide	Agentforce Developer Guide
Release Notes	Financial Services Cloud Release Notes

Post-Dreamforce Resources

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

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