

Agentforce Financial Services

Summer '26 Release (262)
Key Highlights



Forward-looking statements

This presentation contains forward-looking statements about, among other things, trend analyses and statements regarding future events, anticipated growth and industry prospects, and our strategies, expectation or plans regarding product releases and enhancements. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, results or outcomes could differ materially from those expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to our ability to meet the expectations of our customers; uncertainties regarding AI technologies and their integration into our product offerings; the effect of evolving domestic and foreign government regulations; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including related to AI and Agentforce; our ability to execute our business plans; the pace of change and innovation and our ability to compete in the markets in which we participate; and our ability to maintain and enhance our brands.

Agentforce Financial Services

B2B Sales



Flexible Hierarchies Enhancements



See the full picture of complex business relationships and the insights to grow them.

Gain true wallet view with Summary Rollups

Deliver aggregated KPIs at every hierarchy node automatically with summary rollups.

Engage with key contacts

Find related influential decision-makers across the hierarchy without navigating record by record

Discover opportunities across the hierarchy

Identify product penetration gaps and cross-sell opportunities at every node

Empower Admins to deliver faster resolutions

In-app notifications and downloadable reports flag data load failures immediately with actionable resolution guidance

The screenshot displays a Salesforce Account page for 'West Bridge North...'. The main content area shows a 'Business Hierarchy (3)' for 'WBG New Sales Hierarchy'. The hierarchy is a tree structure with nodes representing different levels of the organization. The top node is 'West bridge Group (WBG)' with an aggregated AUM of \$300M. Below it is 'West bridge Enterprises' with an aggregated AUM of \$200M. The 'West bridge Enterprises' node is expanded to show four regional nodes: 'West bridge South' (\$50M), 'West bridge North' (Current, \$50M), 'West bridge East' (\$50M), and 'West bridge West' (\$50M). Each node has a dropdown arrow and a count of sub-nodes. The 'West bridge North' node is currently selected. The interface includes a search bar, filters, and an activity panel on the right.

Model complex, multi-dimensional B2B relationships to drive growth

The Agentic Advisor Experience Suite

Reimagine high-touch relationship management

Elevate advisor capacity

Guide advisors with smarter insights

Personalize every client interaction

Unify data, apps, and workflows

Agentforce Meeting Concierge | June '26

Run My Day | July '26

Connector Library | Roadmap

The screenshot displays the Salesforce Cumulus interface for a client's annual review meeting. The interface is organized into several key sections:

- Client Summary:** Provides a high-level overview of the client, Eriko Miyazaki, with an AUM of \$4.8M and a moderate growth rate. It lists key goals, such as a \$7M retirement at 60 and college funding, and includes sections for Financial Context, Sentiment, and Risk Sensitivity.
- Meeting Prep Tasks:** A table listing tasks assigned to Shelly Ta... with due dates and completion statuses (Complete, In Progress, Pending).
- Meeting Prep Brief:** Offers a detailed snapshot of the client's relationship, including goals like retiring at 60 with \$7M in savings and evaluating a vacation home.
- Global Context 360:** A comprehensive view of the client's life events, goals, and actions, such as education funding, career advancement, and retirement planning.
- My Practice Performance:** A chart showing performance metrics over time.
- At Risk Clients:** A notification indicating that 8 existing wealth clients are at risk of potential attrition.
- Slack Integration:** A sidebar showing a Slack channel for collaboration, with a message input field and a "Post an update" button.

The interface is decorated with blue starburst graphics and the Salesforce logo in the top right corner.

Agentforce Meeting Concierge



Help advisors do their best work

Turn hours of meeting work into seconds

Help advisors prepare for meetings in seconds and automate information gathering, notes, record updates, and follow-up.

Drive better conversations with smarter insights

Turn real-time client data into intelligent summaries, tailored recommendations, and live in-conversation guidance.

Personalize every client interaction at scale

Enter every meeting with full context and deliver consistent, high-touch guidance across the entire book.

Manage the meeting lifecycle in one place

Eliminate swivel across systems with a single hub for past and upcoming meetings unifying history, conversations, and actions.

The screenshot displays a user interface for 'Miyazaki Annual Review' with the following sections:

- Meeting Prep Readiness:** 0/10 Completed, with a Refresh button.
- Client Summary:** Last update at [timestamp] by [person or Agentforce]. Client: Eriko Miyazaki | 51. AUM \$4.8M | Moderate Growth. Includes goals, financial context, sentiment, and risk sensitivity.
- Documents:** Upload area with 'Upload Files' and 'Or drop files' buttons. Accepted formats: pdf, .png, .jpeg.
- Attendees:** Section for managing meeting participants.
- Meeting Prep Tasks:** A table with columns: Subject, Owner, Due Date, Status. Tasks include 'Confirm Schedu...', 'Update Latest T...', 'Reassess Risk', 'Update Profile', and 'Confirm financia...'. All are 'Pending'.
- Meeting Prep Brief:** Client: Eriko Miyazaki, Meeting: Annual Review, Date: March 18, 2026, AUM: \$4.8M | Risk: Moderate Growth. Includes a 'Relationship Snapshot' and 'Portfolio Overview'.
- Slack:** Integration section for better collaboration.
- Notes:** Section for taking meeting notes.
- Generate Discussion Guide:** A button at the bottom right.



Agentforce Financial Services

Service



Automating the trusted dispute lifecycle



One platform to resolve disputes in days, not months

Proactive customer outreach

Clarify unrecognized charges early by connecting with cardholders on their preferred digital channel before a formal claim is ever filed.

Access real-time partner network data

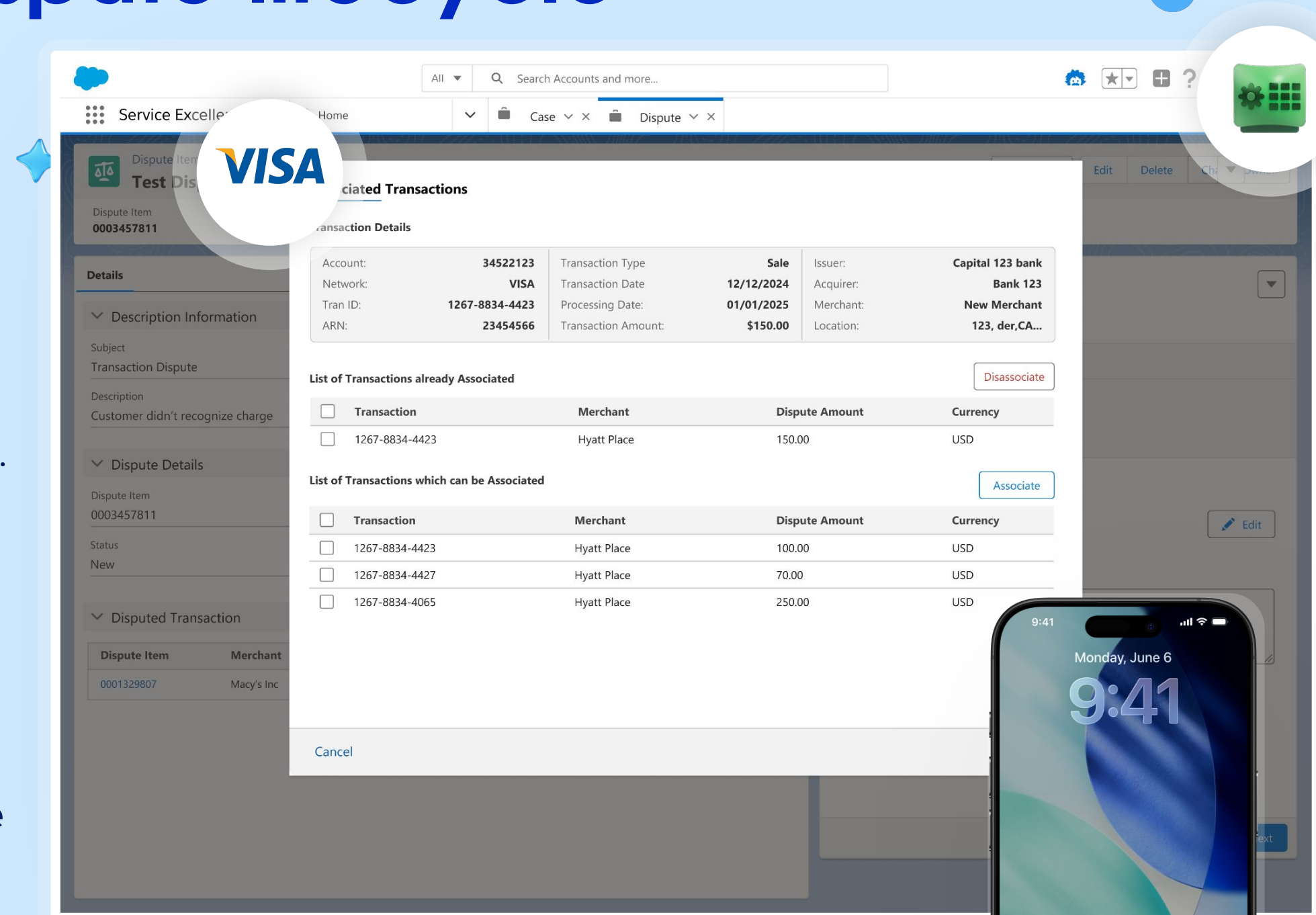
Execute official chargebacks and pull real time merchant evidence directly from partners like Visa without leaving your workspace.

Automated & efficient processing

Replace manual data entry with intelligent routing to instantly issue provisional credit and accelerate investigation & resolution.

Deliver prompt and accurate resolution at scale

Deploy pre built dispute AI agents to reduce manual work and enforce accurate intake data capture at scale.



Banks do not just compete on checking account features anymore. You compete on trust.

Real Time Visa Integration: Turning Anxiety Into Loyalty

Eliminate Manual Portal Hopping

Native connectivity pushes real time network updates directly into the primary workspace. Eliminating the “swivel chair” so they can focus on complex investigations and deliver exceptional service.

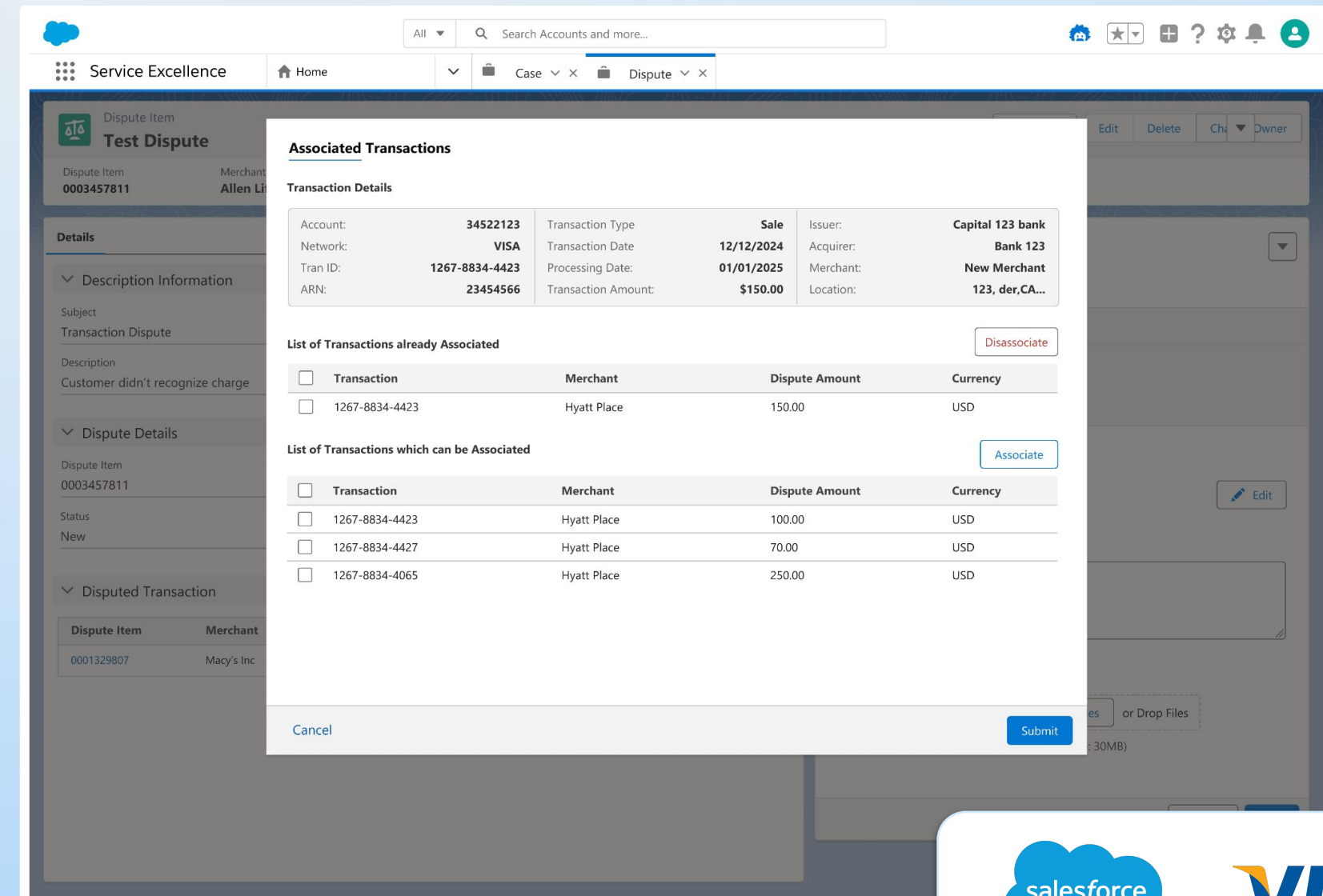
Automated Case Progression

The moment Visa pushes an update, the platform automatically advances the dispute to the next stage in the lifecycle, reducing manual human dependency that often causes processing backlogs.

Enhanced Customer Transparency

Parallel workflows automatically trigger proactive communication journeys the second a case advances. Keeping customers completely informed at every single step turns high anxiety moments into lifelong loyalty.

**Licensing: Requires FSC Service SKUs*



Why Visa Integration?

Expedite the entire resolution process by bringing vital network data directly into the flow of work.

Ensure perfect regulatory compliance by automating required timeline communications.

Empower dispute specialists to process higher volumes at global scale without adding headcount.

Intelligent Referral Management

salesforce

One platform to resolve the service-to sales gap and drive growth

Discover hidden revenue with AI

Automatically extract customer intent from live service calls and instantly flag portfolio gaps to build pipeline.

Instantly route leads to the proper banker

Eliminate handoff friction by intelligently matching service referrals to the ideal banker based on expertise and capacity.

Convert deals faster with context

Equip bankers and with predictive lead scores and auto-generated call summaries to enter every meeting prepared.

Reward teams to drive growth

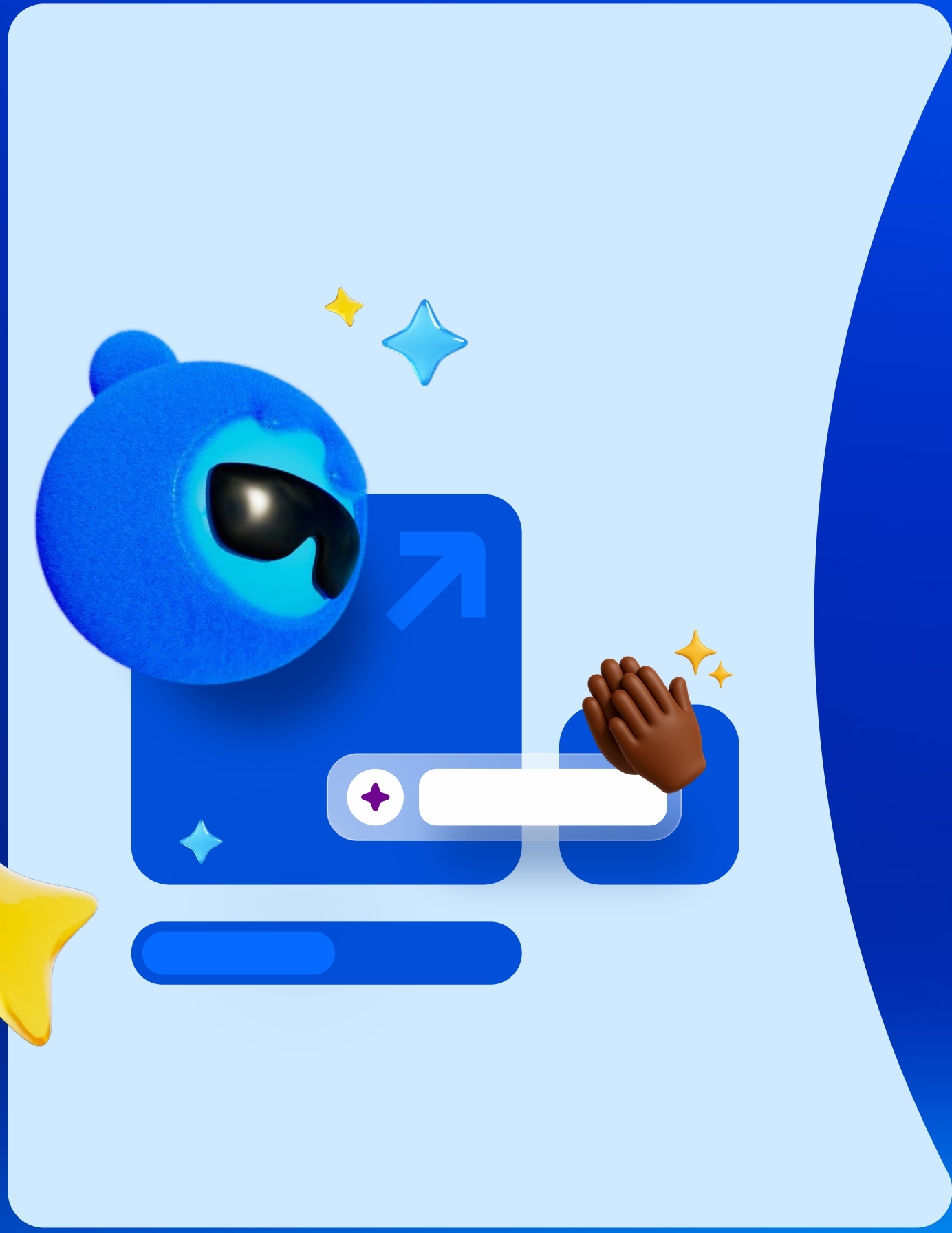
Keep service representatives highly engaged with real-time pipeline visibility and automated commission payouts natively integrated.

The image displays two screenshots of the Salesforce interface. The top screenshot is the 'Referral Performance Dashboard' for 'Retail Banking'. It features four key metrics: Total Referral Pipeline (\$742.5M, +12.4% from last quarter), Total Converted Value (\$188.0M, +8.7% from last quarter), Avg. Conversion Rate (20.2%, +4.2% from last quarter), and Active Referrals (167, +10 new this week). Below these are two tables: 'Conversions by Product' showing Lending (180/480), Mortgages (122/410), Treasury (82/360), Insurance (80/390), and Wealth (61/420); and 'Top Performers' listing John Patel (42 referrals, 75% conversion), Susan Lee (35 referrals, 66%), and Team Alpha (28 referrals, 62%). A 'Low Conversions' table lists David Long (8 referrals, 48%), Jackie Chan (7 referrals, 30%), and Don Uchis (7 referrals, 30%). A 'Referral Breakdown' pie chart shows Customer Referrals, Relationship Referral, and Product Referrals. A text box notes: 'Insurance and Wealth generate 42% of total referrals but contribute only 24% of total conversions. Wealth shows the largest leakage, converting just 61 of 420 referrals, despite comparable demand to Lending.'

The bottom screenshot shows an account hierarchy for 'West Bridge North (WB...)'. It includes a 'Business Hierarchy' tree with nodes for West Bridge Group, West Bridge Enterprise, West Bridge South, West Bridge North, West Bridge N1, West Bridge N2, and West Bridge N2-1. A 'Westbridge North' rollup card shows 'Whitespace Opportunity Est. Revenue: \$20K annually' and 'Aggregated AUM: \$50M'. A 'Market Share' card shows 'Total Market share vs. competitors: 33%'. An 'Activity' timeline is also visible on the right.

Turn every service interaction into a revenue opportunity

Agentforce for Financial Services





Financial Services

250+

prebuilt agents, Subagents & actions

Banking Service

Template: Banking Service Customer Agent

Subagents

- Frequently Asked Questions
- View Balances & Transactions
- Transfer Funds
- Credit Card Bill Payment
- Loan Payment
- One Time Payment
- One Time ACH-Deposit
- Transaction Dispute Intake
- Secure PIN Services
- Request Loan Payoff
- Card Security (Lock/Unlock)
- Report Lost Card
- Travel Notification
- Flexible Billing Management
- Statement Services
- Fee Reversal
- Address Update
- Stop Check Payment
- Order Checkbook
- Check Payment Cancellation
- Checkbook Order
- Travel Notification
- Card Setting Management
- Loan Payoff Statement
- Billing Cycle Management
- Card Activation
- Manage Standing Instructions
- Check Number Inquiry
- Complaint Intake
- Credit Limit Management
- Credit Card Tracking

*Due to the volume of banking Subagents and actions, we have only included topics/subagents numerous actions per Subagent)

[See full list](#)

Template: Banking Service Employee Agent
Subagents

- View Balances & Transactions
- Transfer Funds
- Credit Card Bill Payment
- Loan Payment
- One Time Payment
- One Time ACH-Deposit
- Transaction Dispute Intake
- Secure PIN Services
- Request Loan Payoff
- Card Security (Lock/Unlock)
- Report Lost Card
- Travel Notification
- Flexible Billing Management
- Statement Services
- Fee Reversal
- Address Update
- Stop Check Payment
- Order Checkbook
- Card Activation
- Manage Standing Instructions
- Check Number Inquiry
- Payment Deferral
- Payment Due Date Modification
- Credit Limit Management
- Credit Card Tracking
- Account Closure

Complaint Management

Template: Complaints Management
Employee Agent

Subagent: Complaints Management

- Find Similar Complaints
- Find Similar Unresolved Complaints
- Suggest Next Steps
- Analyze Assessment for Public Complaint
- Email Complaint Participant

Compliance (Pilot) *

Template: Frontline Compliance Agent

Subagent: Compliance Requirements

- Find Policy Clauses
- Find Regulations

Banking Sales

Template: Relationship Agent

Subagent: Pre-Meeting Prep

- Generate a Tear Sheet (Meeting Brief)

The following actions are coming soon

- Review Upcoming Business Milestone

- Review My Day

- Book an Appointment

- Prepare Talk Track Based on Account Activity

- Relationship Insights Uptake (Pilot/Beta)

Subagent: Post-Meeting Wrap-Up

- Structure Meeting Notes

- Create Interaction

- Create Interaction Summary

- Create Interaction Attendee

- Create a To Do

- Draft or Revise Email

- Create Client Plan Objectives

- Create Client Plan Measures

- Create Opportunity

- Add an Interest Tag

- Get Interactions by Date

- Identify Record by Name

- Update Records

- Query Records

Insurance Claims (GA in June)

Template: Claims Service Agent

Subagent: First Notice of Loss (FNOL)

- Get Insurance Policies
- Get Insurance Claims
- Draft Claim Creation Email
- Get Insurance Business Line Instructions
- Create Insurance Claim
- Create Claim Item
- Create Claim Participant
- Draft Attachment Intake Email
- Get Policy Participants
- Get Policy Assets
- Get Dynamic Enumeration Values

Insurance Service

Template: Insurance Service Agent

Subagent: Insurance Summarization

- Get Policyholder Details

- Get Quote Details

Subagent: Policy Servicing

- Generate Proof of Insurance

Wealth Management

Template: Financial Advisor Agent

Subagent: Advisor Meeting Preparation

- Wealth Client Summary

- Wealth Household Summary

- Portfolio Performance Summary

- Current vs Target Allocation

- Recent and Upcoming

- Life Events for Client

- Financial Planning and

- Goals Progress

- Create Agenda Draft

- Summarize Agenda Draft

- Summarize Record Alerts

- Setting Alerts

- Dynamic Note Addition to Agenda

Sub Agent: Post-Meeting Follow-up

- Structure Meeting Notes

- Create Financial Plan

- Create Financial Goal

- Create Person Life Event

- Create Action Plan

- Create Action Plan Item

- Create Interest Tag

- Create Record Alert

- Extract Action Plans from Meeting

- Notes

- Extract Financial Plans from Meeting

- Notes

- Extract Financial Goals from Meeting

- Notes

- Extract Person Life Events from

- Meeting Notes

- Extract Interest Tags from Meeting

- Notes

Lending*

Template: Loan Product Discovery

Subagent: Loan Product Discovery

- Analyze Estimated Loan

- Retrieve Programs By Product

- Retrieve Product Details

- Retrieve Products By Category

- Retrieve Loan Product Categories

Collections*

Template: Collections Employee Agent

Subagent: Promise-to-Pay

Agreements

- Create Promise to Pay

Subagent: Talking Points

- Compile Scripted Talking Points for

- Next Call

Subagent: Payment Link for

Collection Plan

- Generate and Send Payment Link

Subagent: Case Management

- Create Case and Related Case

- Proceeding

Subagent: Legal Process Assistance

- Update attorney contact details

- Get borrower contact details from

- external sources

Template: Collections Customer

Agent

Subagent: Collections General FAQ

- Get all collections

- Get single collection details

- Get info using RAG

Subagent: Promise to Pay *Requires add-on

- Create Promise to Pay



Learn more about FINS Agentforce Use Cases

*This is not the comprehensive list.

New!

Banking Customer Service Agent In Action



Agentforce Trust Layer

New!

Agentforce for Financial Services on Email

salesforce

New Message

To: Cumulusbank.support
Subject: Request to update primary Address

Hello,

Dear Cumulus Bank Customer,

I hope this message finds you well.

I am writing to request an update to your mailing address as follows:

44 New Avenue,
111/2 Main Street,
Los Angeles, CA 90001

If any additional information is needed, please contact me promptly.

Thank you for your assistance.

Best regards,
Susan Green

Collection Home Cases 005674590

Case Update Mailing Address

Case Number: 005674590 | Case Origin: Email | Created On: 13 May, 2025 | Status: Draft | Drafted By: Agentforce - Banking Ser...

Case Draft | Drafted by: Agentforce - Banking Service Agent

AI Summary

Case Overview:
On August 15, 2025, the customer submitted a request to update their mailing address through the AI-powered support portal. The customer indicated the change was necessary due to a recent move. The AI agent acknowledged the request and initiated the case.

Actions Taken:

- Customer Identification: Verified customer identity using secure authentication protocols, including name, date of birth, and recent transaction history.
- Address Update: Updated the mailing address on the customer's account and confirmed the change.

AI Service Request Information

Address line 1	Address line 2
44 New Avenue	111/2 Main Street
City	State
Los Angeles	California (CA)
Country	Zip Code
United States (US)	90001

Activity Timeline

- Update Mailing Address (11:30am) - Created by: Banking Service Agent
- Case created (10:45am) - Email to case
- Request to update primary Address (9:00am) - Susan Green emailed Cumulus Service

Protect Brand Reputation & Compliance

Safeguard your bank's reputation by using AI to draft accurate responses to reduce compliance risk and unprofessional typos often found in manual written correspondence.

Scale Email Operations Instantly

Handle unlimited spikes in inbox volume without adding headcount by leveraging AI to instantly parse inquiries and draft responses, clearing backlogs faster than humanly possible.

Drive Loyalty & Deflect Voice Calls

Boost CSAT and prevent frustrated follow-up calls by delivering prompt, accurate resolutions directly in the email channel.

Claims Service Agent

Foster Empathy and Build Loyalty

Reduce manual claims intake freeing human teams to focus on empathetic communication to build policyholder loyalty at moments that matter.

Scale Intake Capacity Efficiently

Process high claim volumes rapidly using AI agents, scaling operational capacity without adding new headcount.

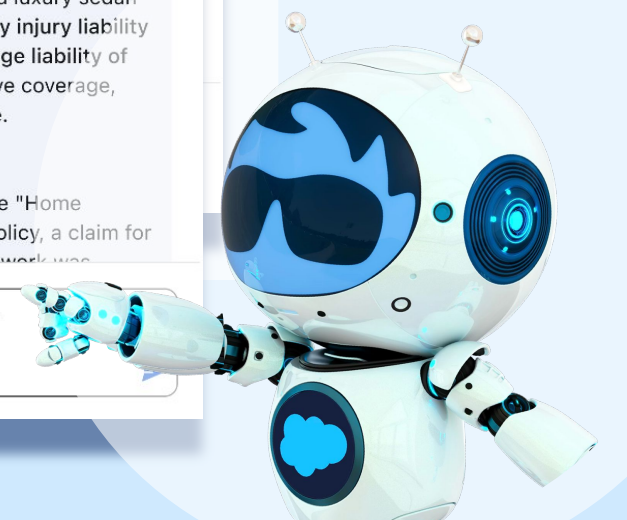
Maintain Vital Data Integrity

Consolidate data surfacing, capture, and updates using AI agents, reducing manual screen switching to maintain precise records

The screenshot displays the Salesforce Agentforce interface for an insurance service agent. The main view shows a customer profile for Jenny Will, including contact information and relationship details. Key sections include:

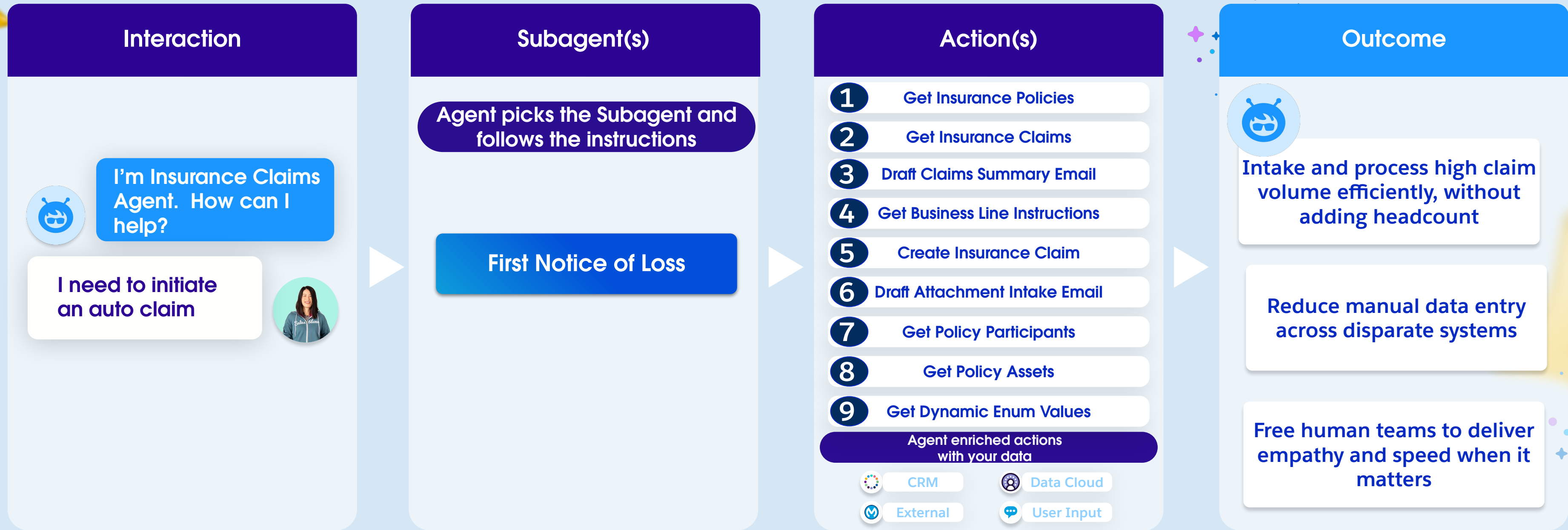
- Action Launcher:** Search bar and buttons for 'FNOL' and 'Policy Renewal'.
- Alerts:** Notifications such as 'Claim HIC671379 is set to "Under Evaluation" based on Assessment Report.' and 'There is an add claim item request for Claim HIC671379.'
- Life Events:** Timeline showing events like Birthday (1984), Graduation (2005), Job (2005), Car (2007), and House (2015).
- Policies Table:**

Policy Type	Policy ID	Insured Value	Premium Paid
Auto Insurance	AI42376	US \$125,000.00	US \$6,000.00
Home Insurance	HI79325	US \$500,000.00	US \$2,200.00
- Activity:** Log of recent interactions, including 'Claim status enquiry' and 'Auto Insurance Policy #537...'.
- Insurance Agentforce Chat:** A chat window on the right showing a conversation where the AI agent provides account information and policy details for Jenny Will.





Claims Service Agent In Action



Process Compliance Navigator



Introducing

Process Compliance Navigator

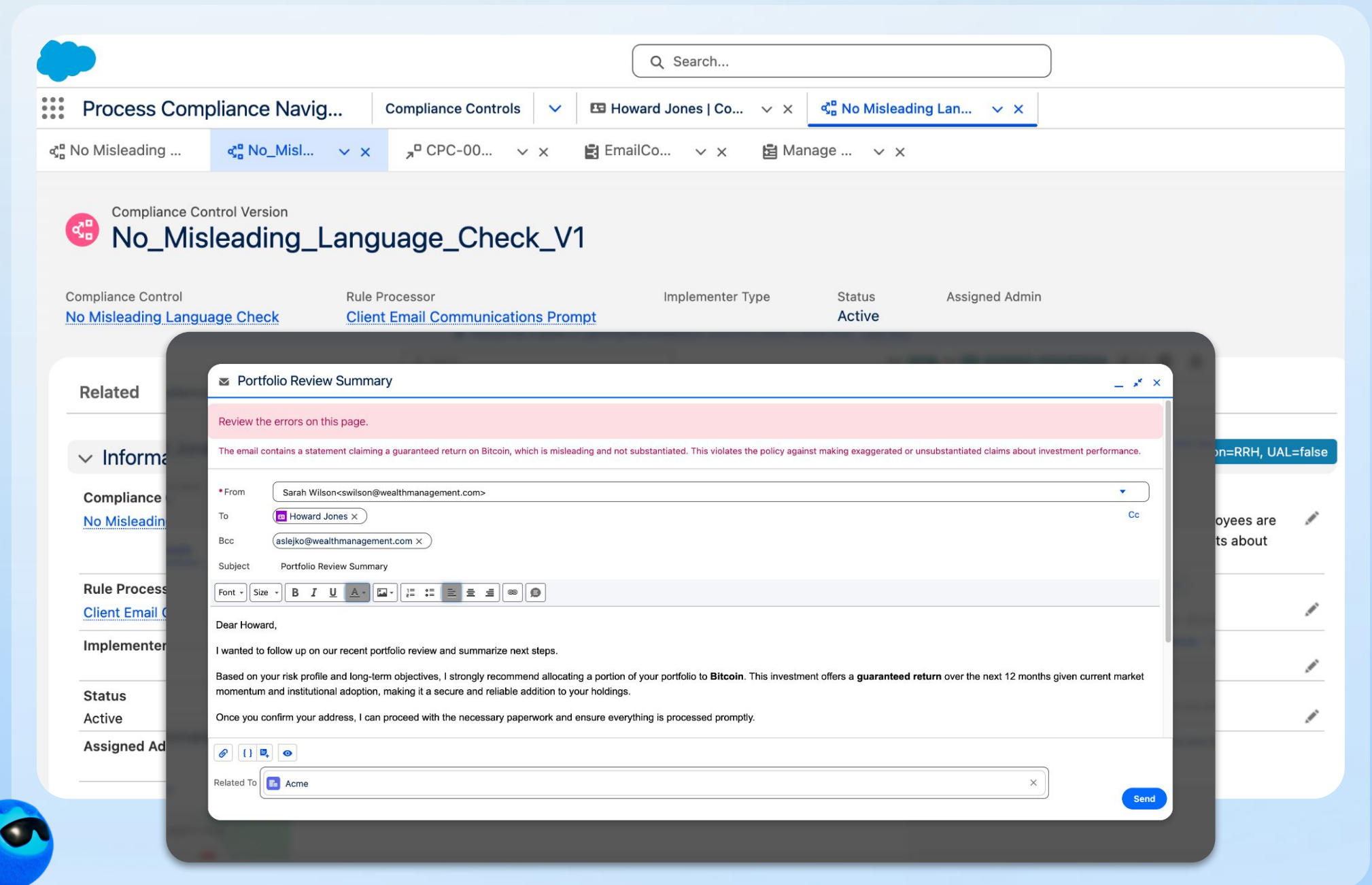
salesforce

Eliminates the Execution Gap: Connects back-office policy to frontline execution seamlessly.

Built-in vs. Bolted-on: Transforms compliance from a static checklist to an automated defense natively inside Salesforce.

Real-Time Compliance Controls: Enforces automated controls in the flow of work, intercepting risk in real-time.

Immutable Audit Trails: Generates transaction-level proof for regulators instantly.



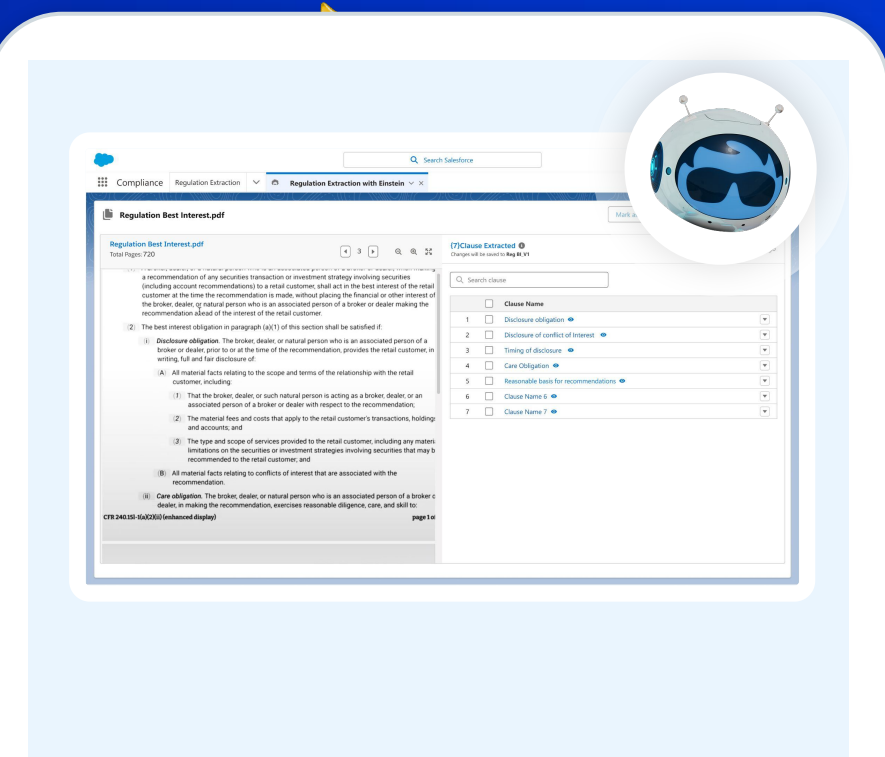
Unify Risk Frameworks and Business Process Execution



Key Features in AI Features

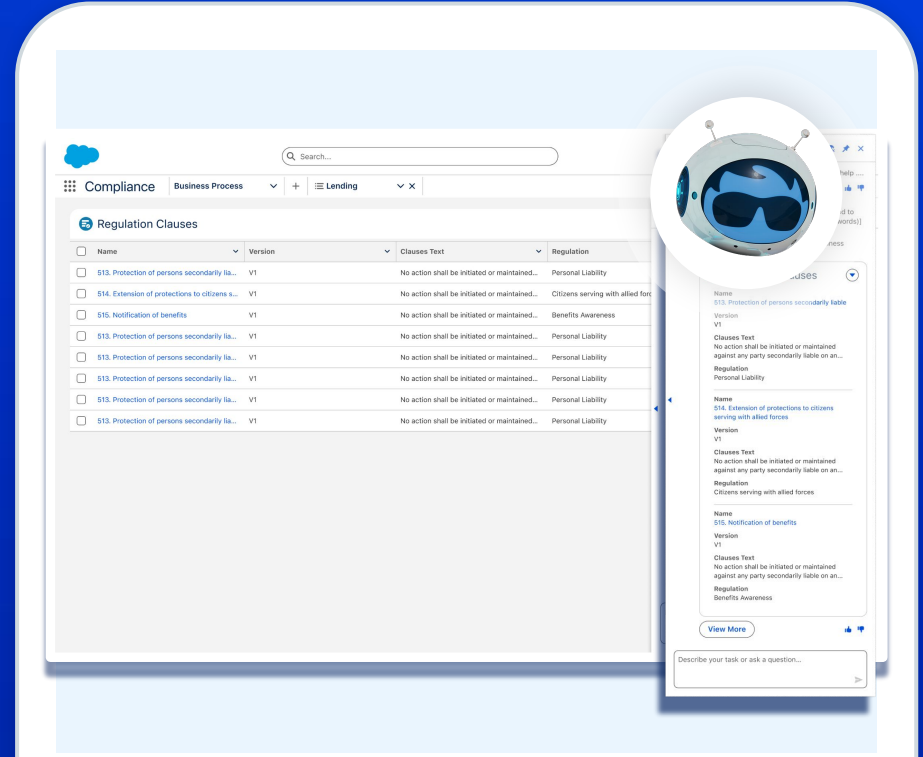


What's new?



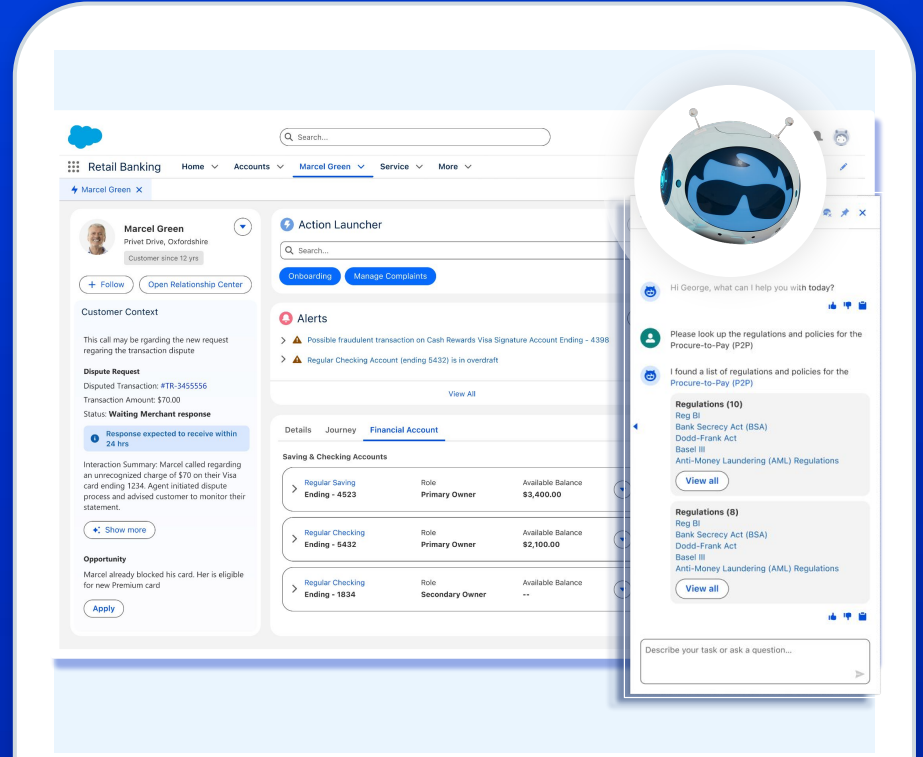
AI-Assisted Clause Extraction

Automatically identify and extract critical policy and regulatory clauses without manual entry accelerating your governance lifecycle and eliminating costly human error.



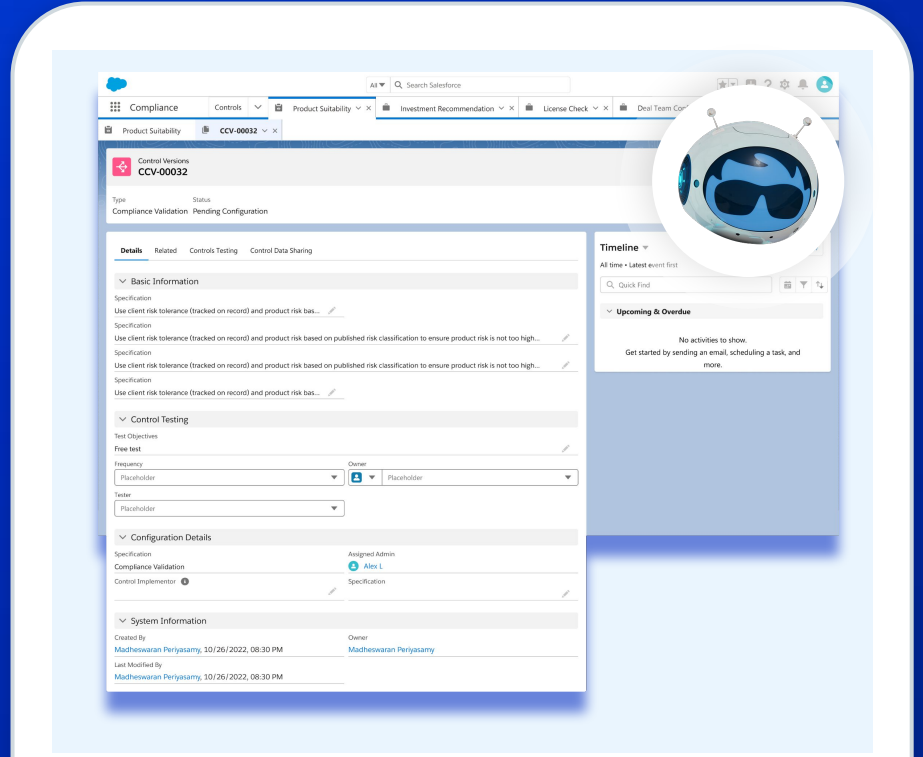
AI Impact Analysis

Proactively scope the "blast radius" of new rules. Use GenAI to instantly map hidden dependencies across your processes and controls, ensuring no risk goes undetected



Frontline Compliance Agent

Give employees a dedicated AI assistant to answer complex policy questions instantly. Ensure staff act with confidence by providing grounded, real-time guidance directly in their flow of work



Natural Language Policy Controls

Build controls using natural language prompting. Automatically intercept and validate AI prompts against your specific policy logic to prevent hallucinations and enforce strict compliance on the frontline

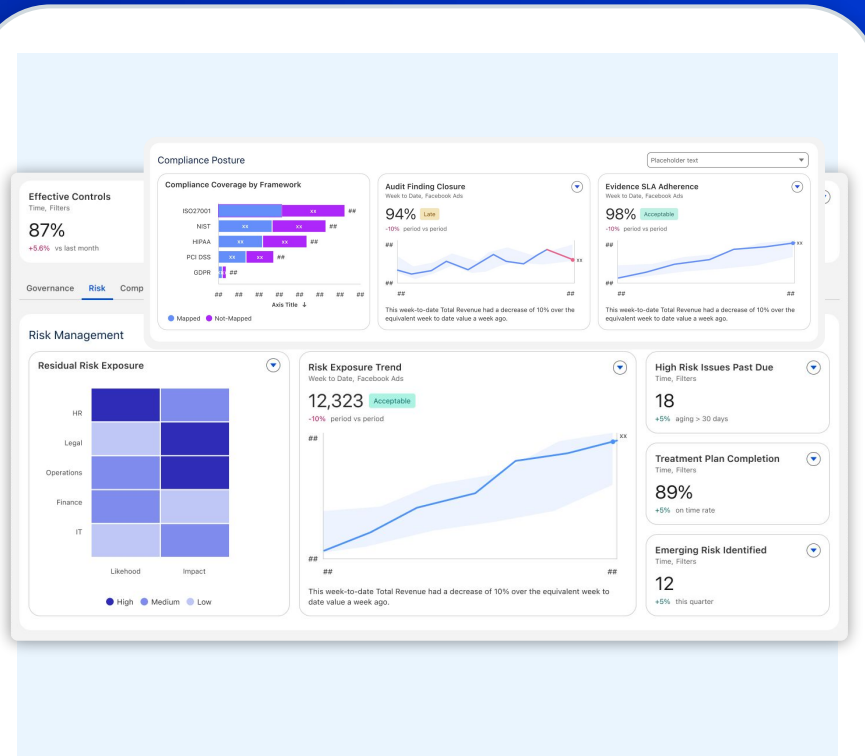


AI Innovation

Key Risk & Policy Management Features

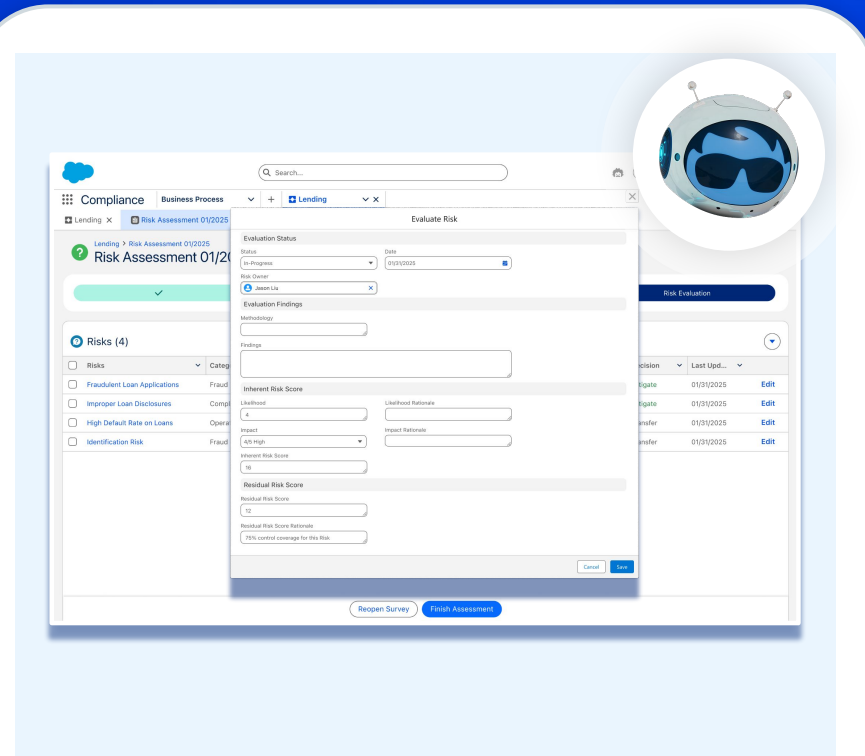


What's new?



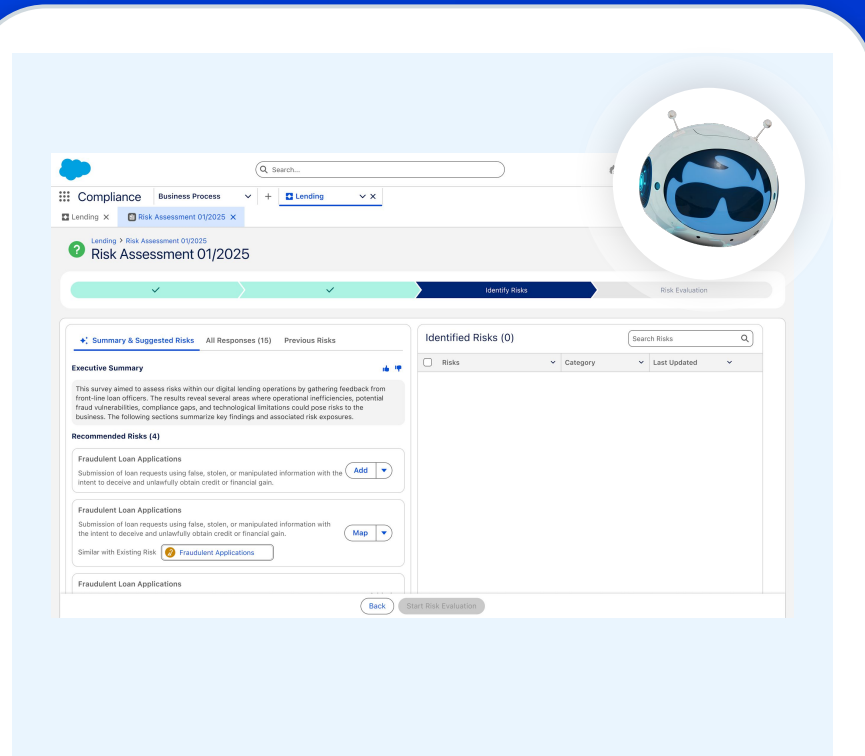
Risk and Compliance Dashboards

Visualize your entire compliance posture at a glance. Use embedded dashboards as a daily command center to surface critical vulnerabilities identify overdue tasks and monitor real time risk heatmaps across the enterprise.



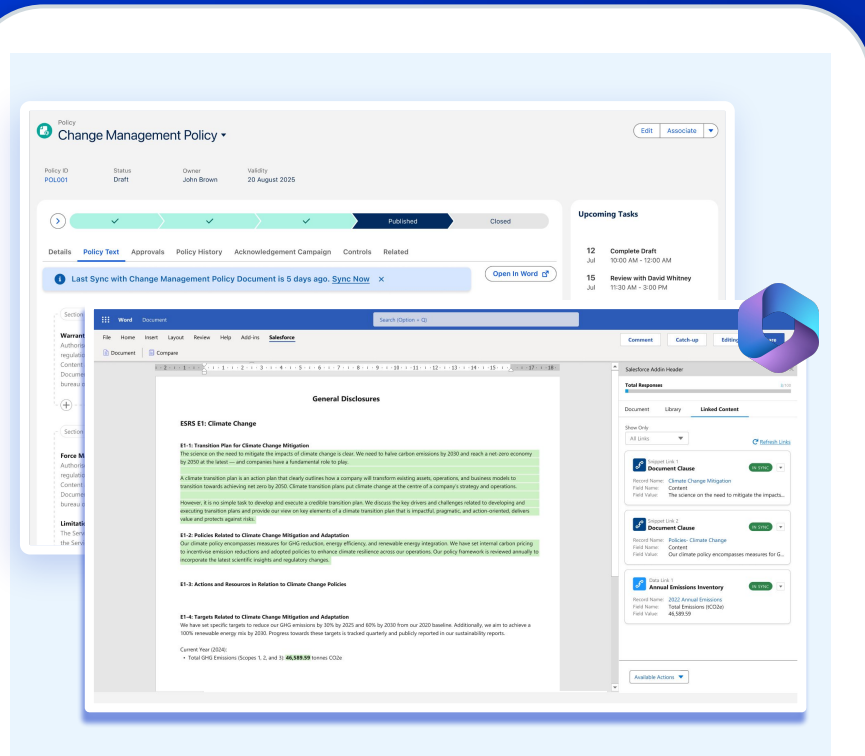
AI-Assisted Risk Assessment

Use AI to draft and launch targeted surveys directly to business unit leaders to continuously evaluate compliance and gather the exact data needed to score risks accurately.



AI Assisted Risk Evaluation

Drive higher efficiency and remove human bias. Leverage advanced AI models to automatically evaluate survey responses providing highly accurate and objective impact scores in seconds so analysts can make faster decisions.



Policy Authoring and Acknowledgment

Collaborate and redline policies directly in Microsoft Word. Edits syncs to Salesforce. Once finalized instantly distribute policies to capture digital employee acknowledgment with a full audit trail.



Risk Management Innovation

End-to-end System of Action for embedding, enforcing, and auditing compliance in the flow of work



Ingest & Interpret

Map & Align

Guide & Enforce

Report & Prove

Ingest Regulations

Define & Revise Policies

Implement Controls

Enforce Compliance

Remediate & Monitor Risk

Audit & Report

Automate regulatory intake and management.

Automate the ingestion of complex regulatory documents, extract material clauses, and instantly identify the "blast radius" of downstream impacts without manual data entry.

Centralize and digitize policy management.

Create a single source of truth for your rulebook. Draft, version, and manage internal policies collaboratively directly in Salesforce to ensure strict alignment with external mandates

Build active guardrails with low-code.

Translate written policies into automated controls using clicks, not code. Empower business process owners to deploy reusable guardrails directly into business workflows.

Intercept risk on the frontline.

Make compliance an invisible part of the daily workflow. Act as a "hard gate" to physically block non-compliant actions in real-time, and provide AI-driven, policy-backed guidance to employees exactly when they need it.

Continuously track and resolve threats.

Model and track enterprise risk in a unified register mapped to CRM data . Use background agents to continuously monitor signals and automatically trigger actionable treatment plans to close compliance gaps before they escalate.

Easily prove compliance.

Generate immutable, transaction-level audit trails natively. Replace manual evidence gathering with real-time coverage reports that definitively prove exactly which policy versions and controls were active during any transaction.

Digital Origination



Salesforce Digital Origination (Formerly called Digital Lending)



Originate multiple loan types and consumer deposits through a single, connected solution



Unified origination solution for multiple product lines



Agentforce helping customer make informed choices



Empowering teams with AI-powered summarization and validations

Future Innovations

Digital Origination for Deposit Accounts | GA Jun 26

Intelligent Document Validation | Upcoming

AI Powered Underwriter Console | Upcoming

Application Form
AF-00000009

Progress: Initiated (2) | On Hold (3) | Rejected (0) | Approved | Intake | Submitted | In Review | Decision | Closed

Stage: On Hold [Mark Stage as Complete]

Record Stage Overview (9 Items)

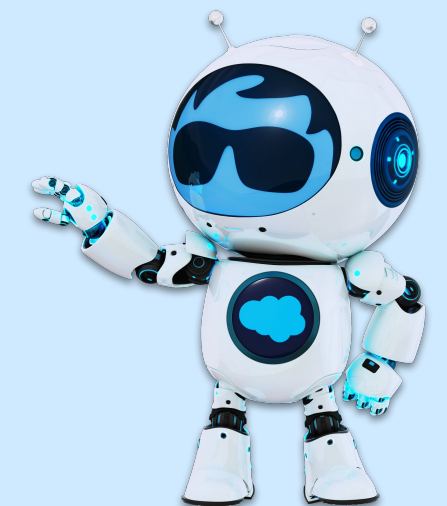
Initiated (2)	In Progress (4)	On Hold (3)	Rejected (0)	Approved
Initial State (2)	From Initiated (4)	From In Progress (3)		
Capture Applica... Owner: SMCommuni... State: In Progress	Pull Credit repo... Owner: Admin User State: In Progress	Upload Missing ... Owner: SMCommuni... State: In Progress		
Initiate Home Loan ... Completi...: 10/7/2025, 2:... State: Completed	Upload KYC an... Owner: SMCommuni... State: In Progress	Awaiting Docu... Owner: SMCommuni... State: In Progress		



Söderberg & Partners

30%

Increase in advisor productivity





Digital Origination for Deposit Account

Increase your Deposits with Faster, Smarter Account Opening

salesforce

Launch Ready-to-Use Digital Origination for Deposit Accounts

Deploy simple, pre-built templates that let customers open new accounts on their own from anywhere. Remove the need for physical branch visits and paperwork, making first impressions effortless.

Remove Verification Delays

Run instant, automated identity and background checks to stop fraud before it starts. Ensure your institution stays fully compliant with regulations without forcing customers to wait for manual approvals or follow-up questions.

Grow Faster with Existing Resources

Link your digital applications directly to your core banking systems to handle more volume automatically. Rapidly grow your deposits and scale your business without the need to hire additional staff.

The screenshot displays the Cumulus Bank website's 'Savings Account Application' page. The header includes the Cumulus Bank logo, navigation links for 'Products', 'Loans', 'Application' (which is underlined), and 'Contact us'. On the right, there is a user profile for 'James Green' and a shopping cart icon with '(2)' items. The main content area is titled 'Savings Account Application' with a sub-header 'Auto Saved'. Below this, a card displays account details: 'Savings Account' with a trash icon, 'List Rate: 4.5% APY', 'No Monthly Fees', 'Minimum Deposit: \$50', and 'Terms: Funds FDIC insured up to \$250,000'. A toggle switch for 'Would You Like To View More Products?' is currently turned off. At the bottom of the card are 'Back' and 'Save and Next' buttons. To the right of the card is a 'Steps:' sidebar with a progress indicator. The current step is 'Review Selected Products', which is highlighted with a blue circle. Other steps in the list include 'Personal Information', 'Savings Account Details', 'Address Information', 'Employment Information', 'Income Information', 'Asset Declaration', 'Disclosures and Consents', and 'Review and Submit'. The footer contains links for 'Products' (with 'Mortgages' below it), 'Information' (with 'Broker Registration' below it), and 'Company' (with 'About Us' below it). The Cumulus logo is on the right, and a newsletter subscription link is at the bottom right.



Insurance

Salesforce named a Leader in the IDC MarketScape

Worldwide Cloud-based Core P&C Insurance Platforms 2025 Vendor Assessment.

”Salesforce Digital Insurance should be considered when an insurer prioritizes scalable digital distribution, rapid process innovation, cross-functional integration, and AI-driven automation, particularly where a global ecosystem and robust CRM capabilities are important, and the business seeks a platform for ongoing DX”



Source: IDC, 2025



IDC MarketScape

Worldwide Software Platforms for National Civilian, 2025-2026



“IDC MarketScape Worldwide Software Platforms for National Civilian Government AI-Powered Personalized Digital Experiences 2025 Vendor Assessment,” September 2025, IDC #US53009125
IDC MarketScape vendor analysis model is designed to provide an overview of the competitive fitness of technology and suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each supplier’s position within a given market. The Capabilities score measures supplier product, go-to-market and business execution in the short-term. The Strategy score measures alignment of supplier strategies with customer requirements in a 3-5-year timeframe. Supplier market share is represented by the size of the icons.





Digital Insurance

Insurance Foundations

Enhancements



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Insurance Taxes and Fees Enhancements



Unified Fees & Taxes Framework

"Fees" will now be supported for quoting and policy management, utilizing the exact same calculation logic and setup as taxes. The primary difference is data persistence: taxes will continue to use the Quote Item Tax Item (QITI) object, while fees will be stored in the Quote Item Premium Adjustment (QIPA) object.

Advanced Calculation Logic

The system will now support sequencing logic to determine the exact order of tax and fee calculations. Additionally, it enables hybrid processing, allowing an organization to use both internal calculations and external tax engines simultaneously for the same product (e.g., external taxes combined with platform-managed fees).

Multi-level Coverage

Policy Administration Enhancements

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Multi-level Coverage



Power sophisticated bundles with multi-level hierarchies and eliminate rigid, flat policy structures.

Launch complex products faster

Outpace the market by deploying sophisticated, multi-level insurance bundles in weeks rather than months using a flexible, hierarchical data model designed for modern risks.

Automate lifecycle precision

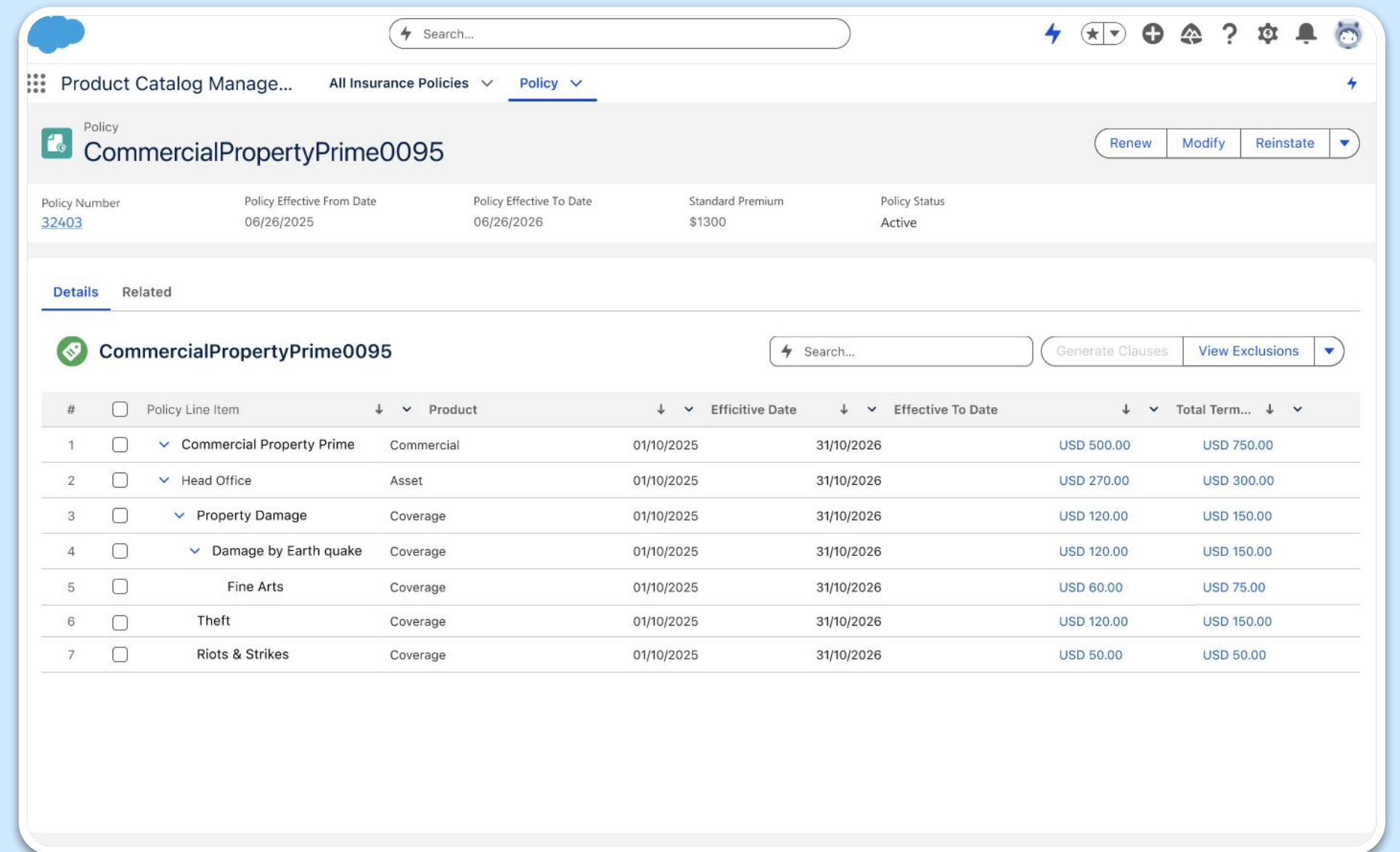
Eliminate manual workarounds with automated endorsements, exclusions, and financial roll-ups that maintain accuracy across up to five levels of nested coverage.

Maximize underwriting agility

Empower your team to offer highly granular commercial and personal lines with specific limits and deductibles at the sub-coverage level for pinpoint risk management.

Eliminate administrative friction

Reduce operational errors and service overhead by ensuring the "Policy of Record" perfectly mirrors the complex quote, providing total clarity from issuance to claims.



Claims Management



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Claims Management Enhancements



Increase financial precision and operational scale

Bulkification of Claims Payment API

Processes up to 18,000 payment records across multiple claims and policies simultaneously via asynchronous bulk execution while natively maintaining all limit checks, validations, and custom calculations.

Child Coverage Support

Enforces up to four levels of hierarchical coverage across the entire policy and claims lifecycle, featuring an optional, automated consumption roll-up to give carriers ultimate flexibility in structuring parent-child risks.

Additional Fields for Custom Calculations

Enables users to pass advanced backend data—such as payment codes, discounts, and provider names—to expression sets and integration procedures to drive more precise, custom deduction calculations.

Insurance Brokerages



Insurance Brokerage Enhancements



Streamline operations and boost efficiency

Reinstatement Invoicing for Brokerage

Streamline the policy lifecycle with a quick-action reinstatement service that enables the immediate restoration and automated invoicing of canceled policies.

Price Change Endorsement Billing

Expand current mid-term adjustment (MTA) functionality by automating mid-term premium adjustments to generate delta invoices and support end-to-end price change endorsements for both Carrier and Brokerage billing.

Plan Benefits Enhancements

Enforce data integrity by mandating required entry for critical benefit attributes like limits and copays, while utilizing default values to eliminate repetitive data entry.

Policy LWC Porting and Enhancements

Deliver a unified, 360-degree view of complex policy hierarchies and assets by porting the comprehensive Policy LWC (Lightning Web Component) to the brokerage product with added support for customizable columns.

[New Insurance Brokerage Product Datasheet](#)

Salesforce Go

For Insurance

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Salesforce Go: Vision

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Empower industry professionals (Admins, PMs, Architects, ISVs) to *smartly* **discover, configure and evaluate** Salesforce features through a *unified experience*, thereby enabling them to solve business challenges effectively and efficiently

Salesforce Go Adoption in Insurance across:

**Foundations & Policy
Administration**

Claims Management

Brokerage



Thank
you

