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

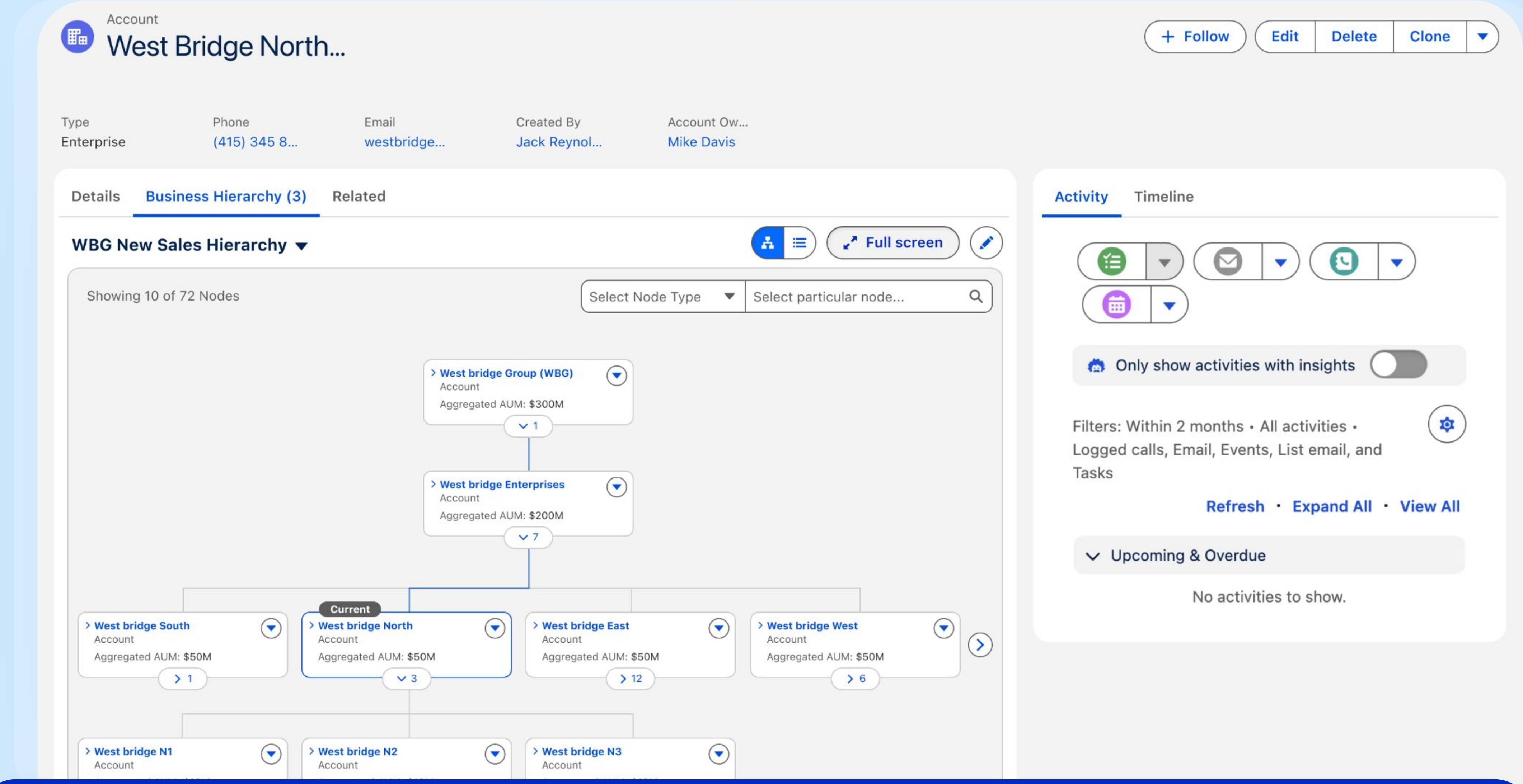
Find related influential decision-makers across the hierarchy without navigating record by record

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



Model complex, multi-dimensional B2B relationships to drive growth

The Agentic Advisor Experience Suite

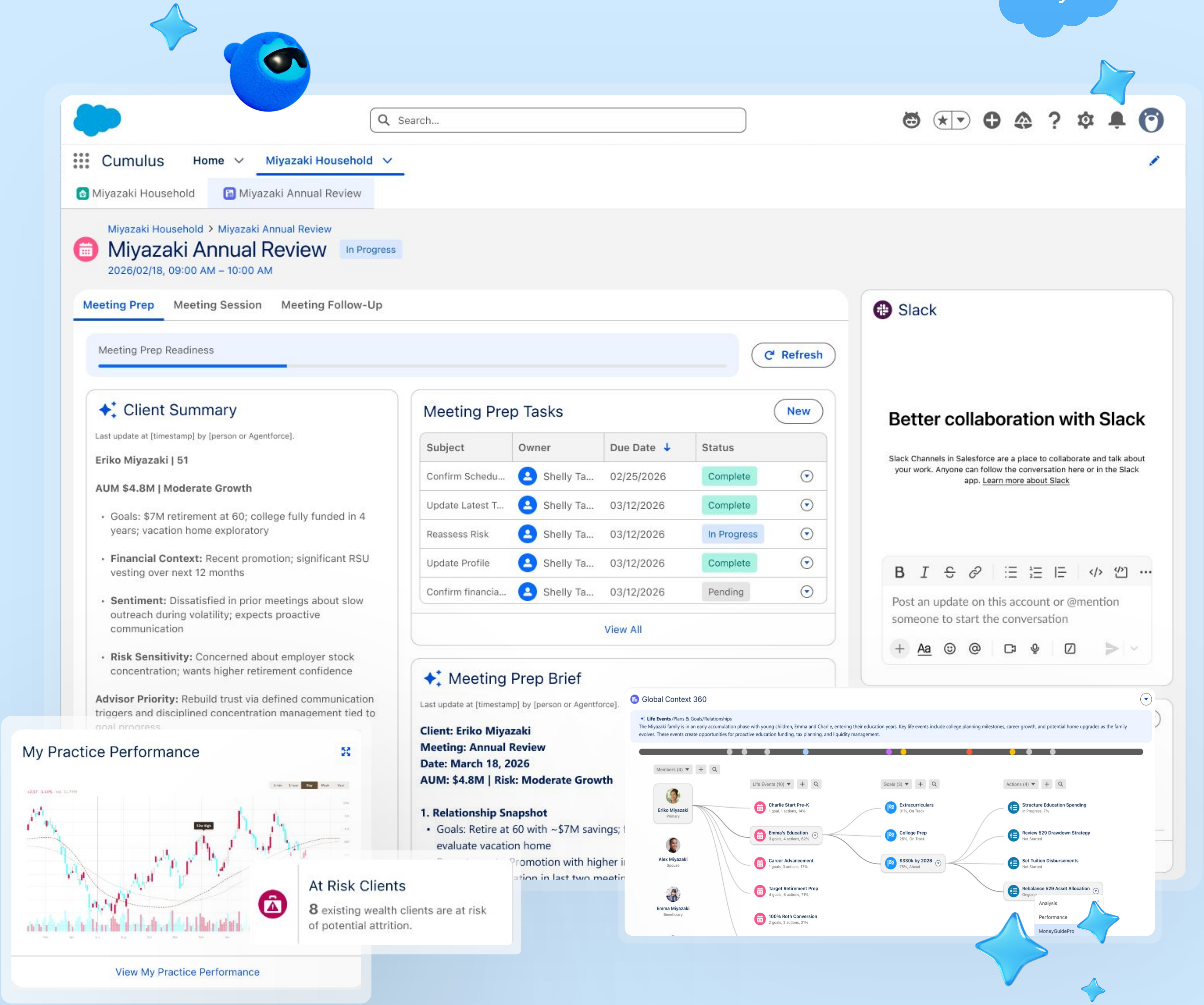
Reimagine high-touch relationship management

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**

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

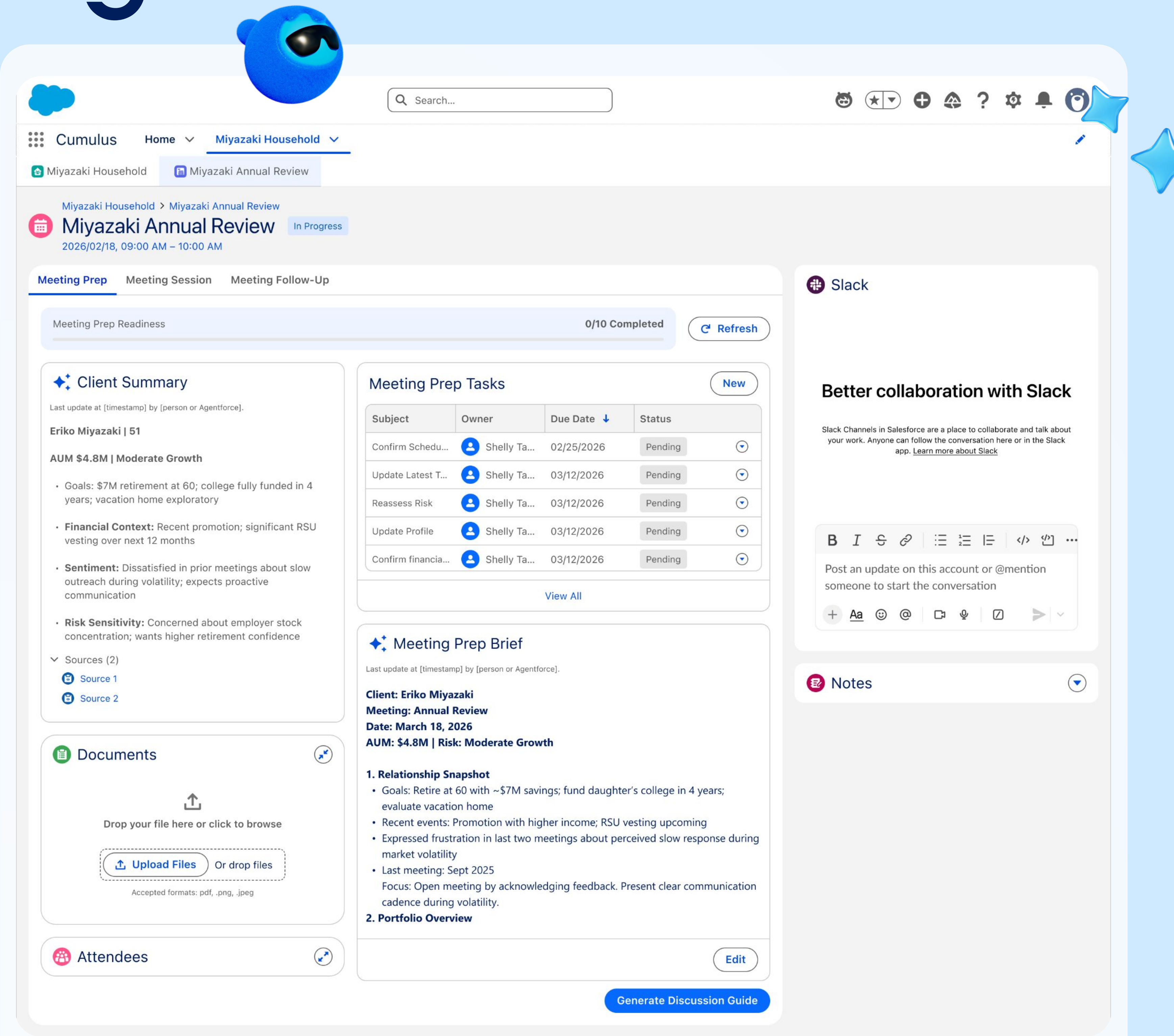
Turn real-time client data into intelligent summaries, tailored recommendations, and live in-conversation guidance.

Personalize every client interaction at scale

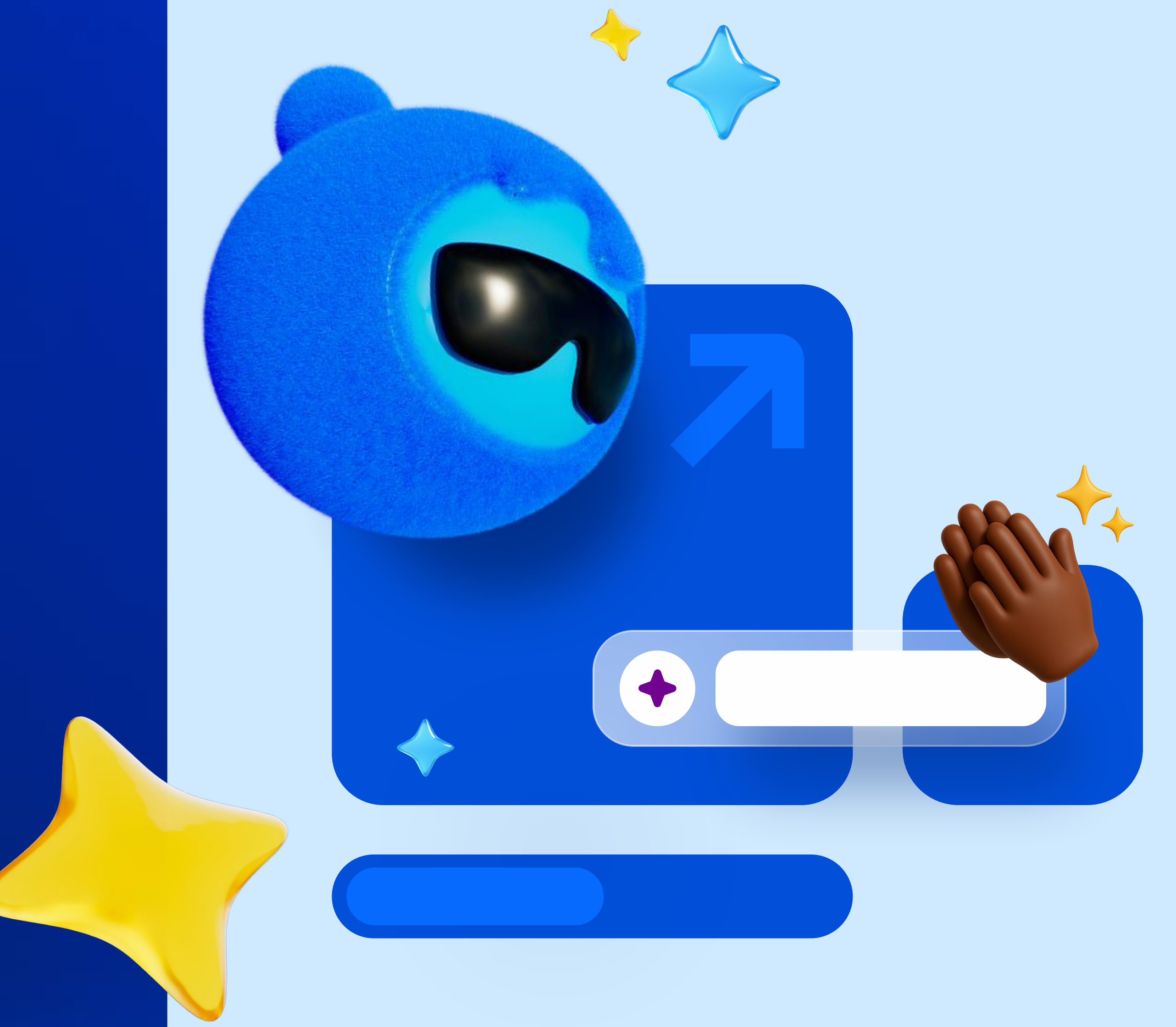
Enter every meeting with full context and deliver consistent, high-touch guidance across the entire book.

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.



Pre Meeting | In Meeting | Post Meeting | Meeting Mgmt



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

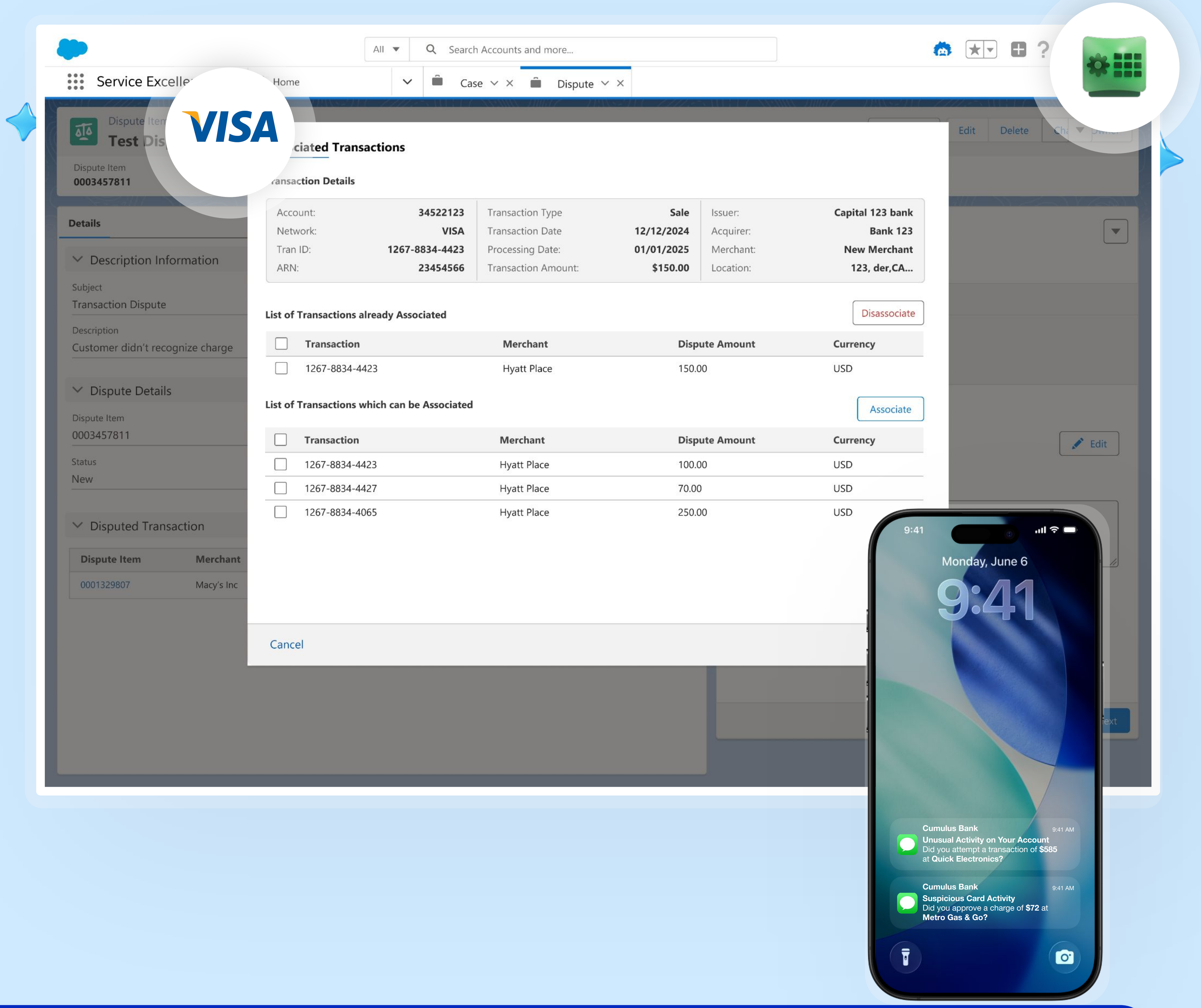
Execute official chargebacks and pull real time merchant evidence directly from partners like Visa without leaving your workspace.

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.

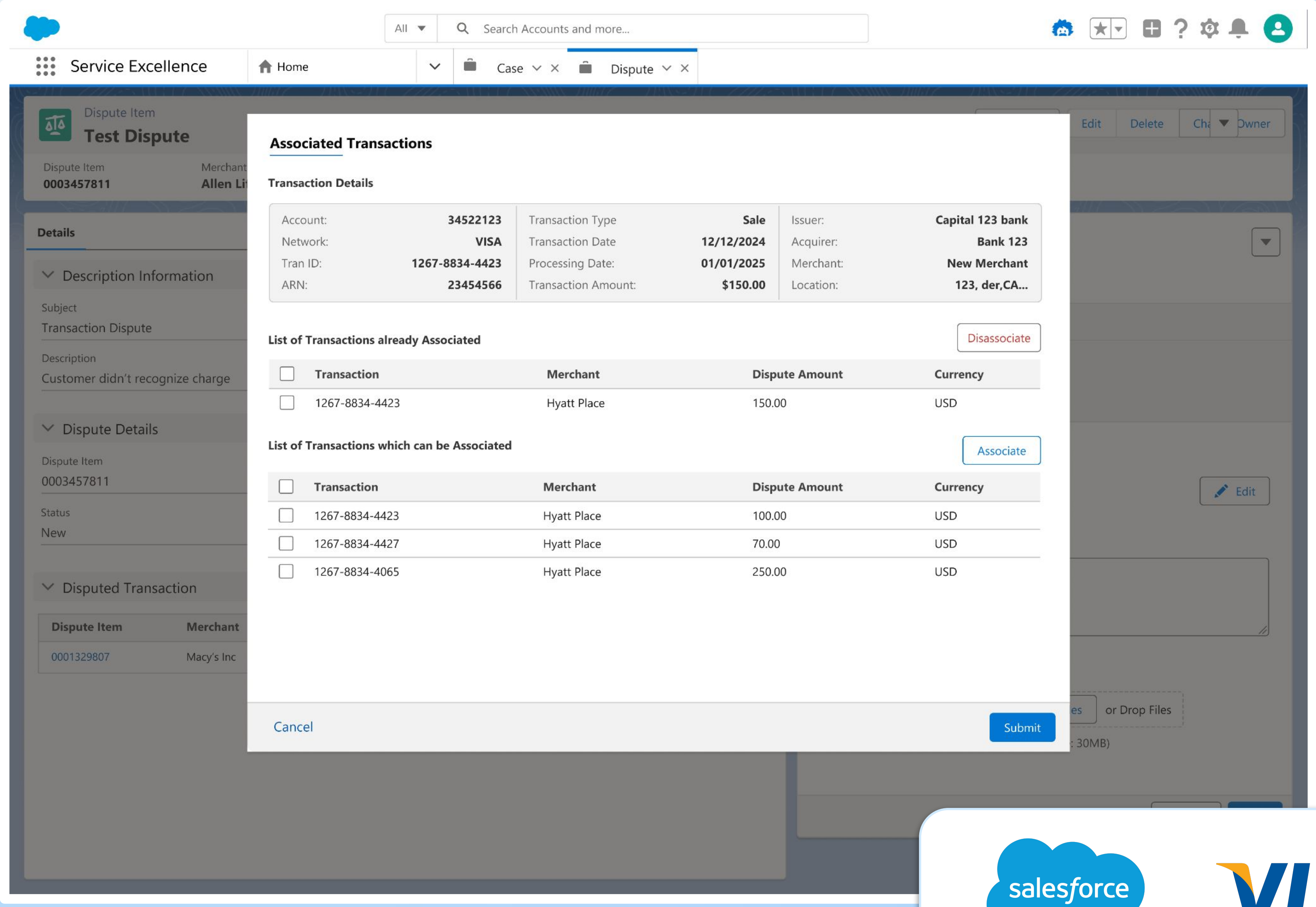
Automated Case Progression

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

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

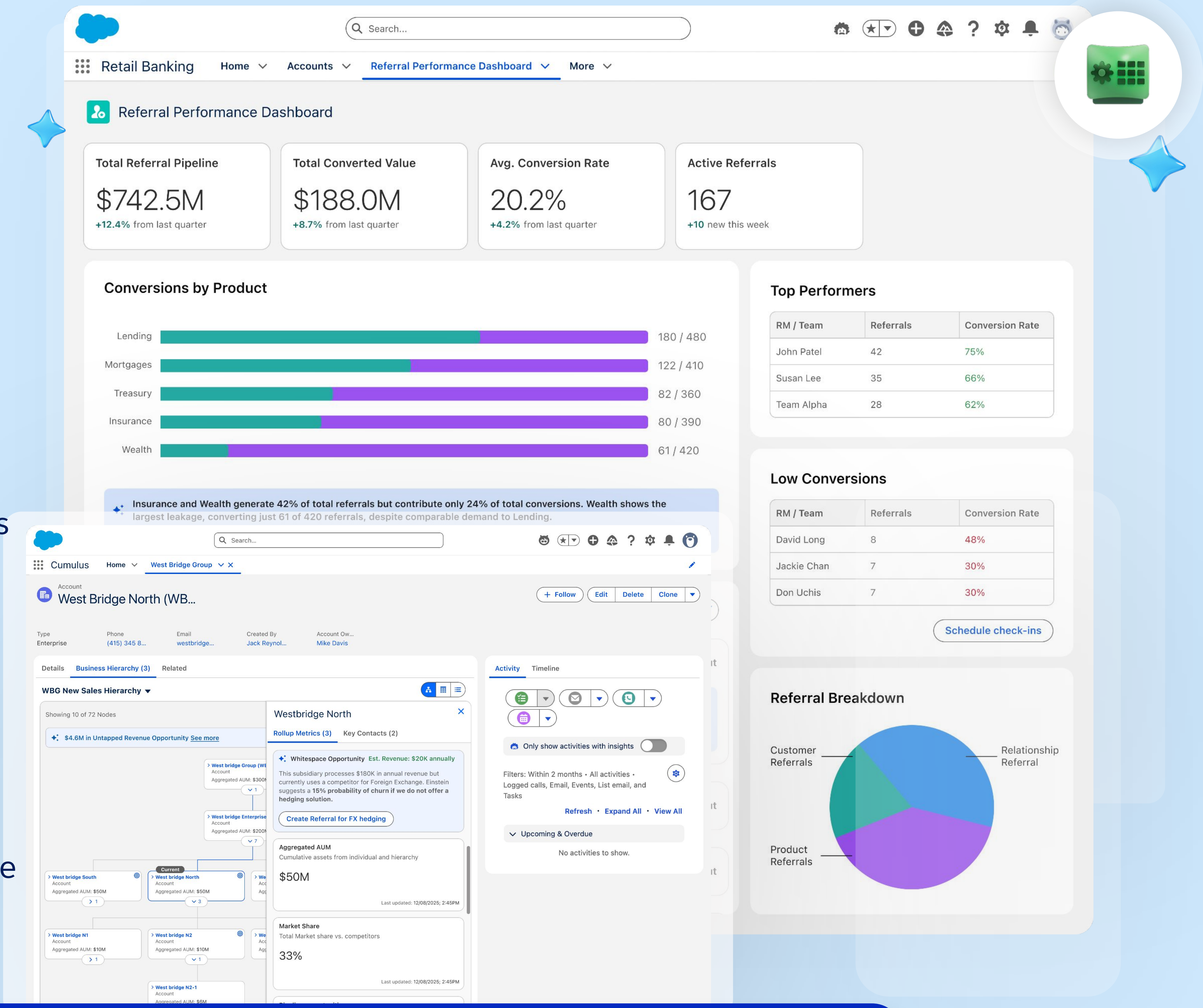
Eliminate handoff friction by intelligently matching service referrals to the ideal banker based on expertise and capacity.

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.



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
- Account Closure

*(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

- Create Promise to Pay

**Requires add-on*

Learn more about FINS Agentforce Use Cases

*This is not the comprehensive list.

New!

Banking Customer Service Agent In Action

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Interaction

I'm Agentforce Banking Agent, How can I help?

I need to dispute a recent charge on my adventure card.

Subagents

Agent picks the right Subagent and follows the instructions

- Check Payment Cancellation
- Travel Notification
- Card Setting Management
- Loan Payoff Statement
- Billing Cycle Management
- Transaction Dispute
- Secure PIN Services
- Card Activation
- Manage Standing Instructions
- Check Number Inquiry
- Complaint Intake
- Credit Limit Management
- Credit Card Tracking
- Account Closure

Actions

1. Get Financial Accounts
2. Get Financial Transactions
3. Get Enriched Transaction Details
4. Get Reason Code for Transaction
5. Reason Subcode for Transaction
6. Create a case for Transaction Dispute
7. Transaction Dispute Questionnaire

Agent enriched actions

- CRM
- Data 360
- External
- User Input

Outcome

- Faster resolution times & more personalized service
- Improved customer satisfaction and retention
- Cost savings through call deflection
- Limitless scale without adding headcount

Agentforce Trust Layer

New!

Agentforce for Financial Services on Email

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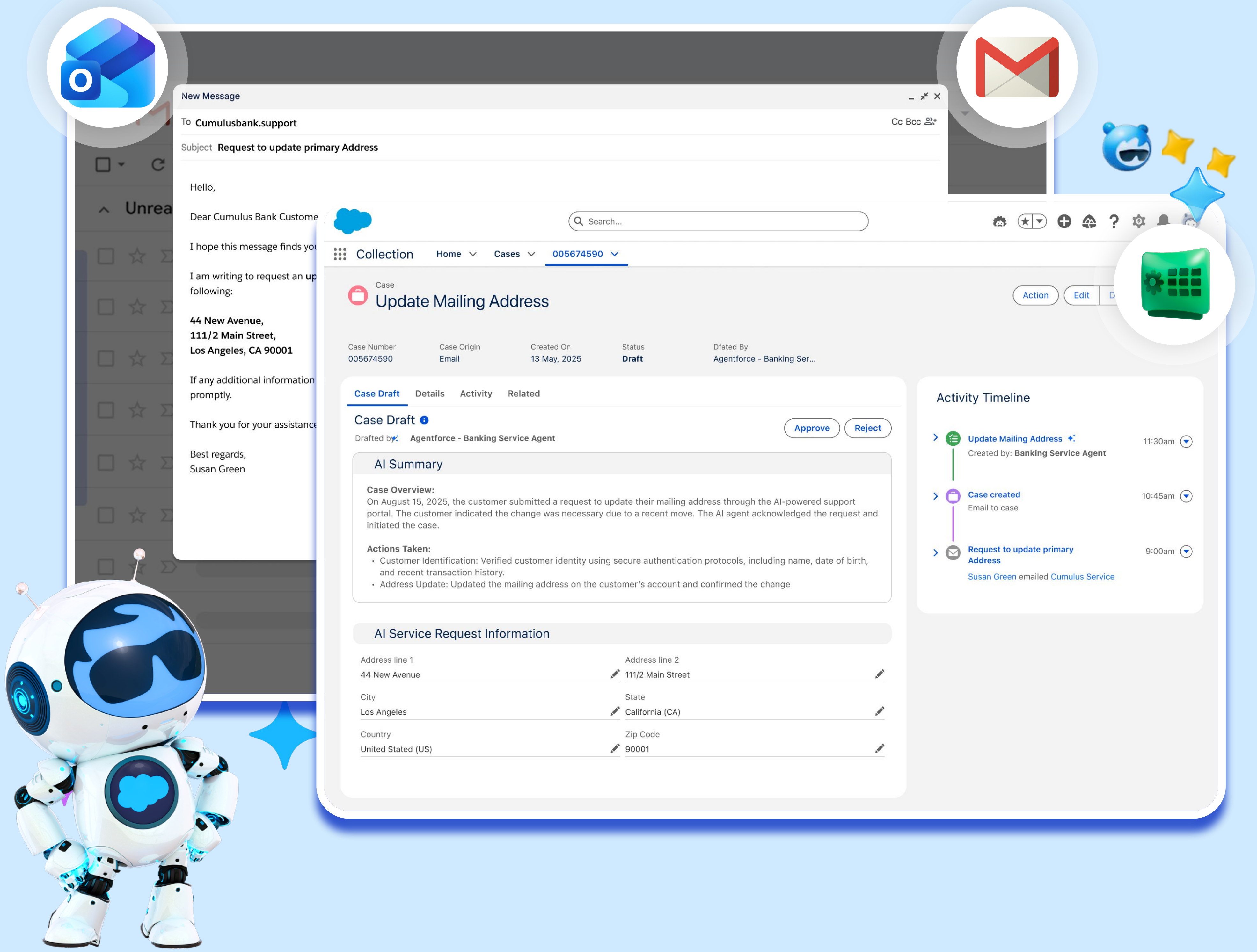


Protect Brand Reputation & Compliance

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

Introducing Agentforce For Insurance

Employee-facing

salesforce

Claims Service Agent

Foster Empathy and Build Loyalty

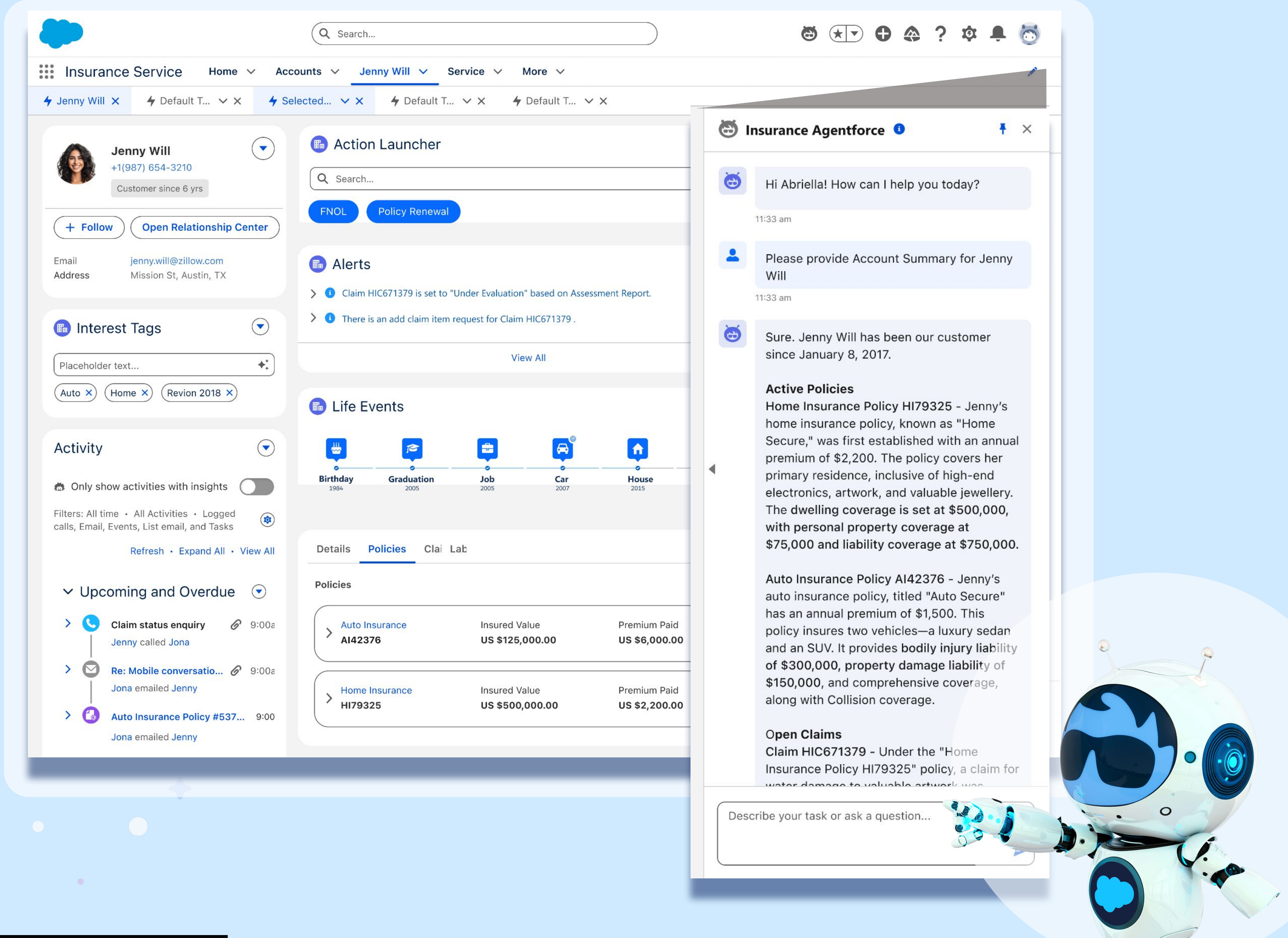
Reduce manual claims intake freeing human teams to focus on empathetic communication to build policyholder loyalty at moments that matter.

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



Employee-facing

Claims Service Agent In Action

salesforce

Interaction

I'm Insurance Claims Agent. How can I help?

I need to initiate an auto claim

Subagent(s)

Agent picks the Subagent and follows the instructions

First Notice of Loss

Action(s)

1. Get Insurance Policies
2. Get Insurance Claims
3. Draft Claims Summary Email
4. Get Business Line Instructions
5. Create Insurance Claim
6. Draft Attachment Intake Email
7. Get Policy Participants
8. Get Policy Assets
9. Get Dynamic Enum Values

Agent enriched actions with your data

CRM

Data Cloud

External

User Input

Outcome

Intake and process high claim volume efficiently, without adding headcount

Reduce manual data entry across disparate systems

Free human teams to deliver empathy and speed when it matters

Agentforce Trust Layer

Process Compliance Navigator

Introducing

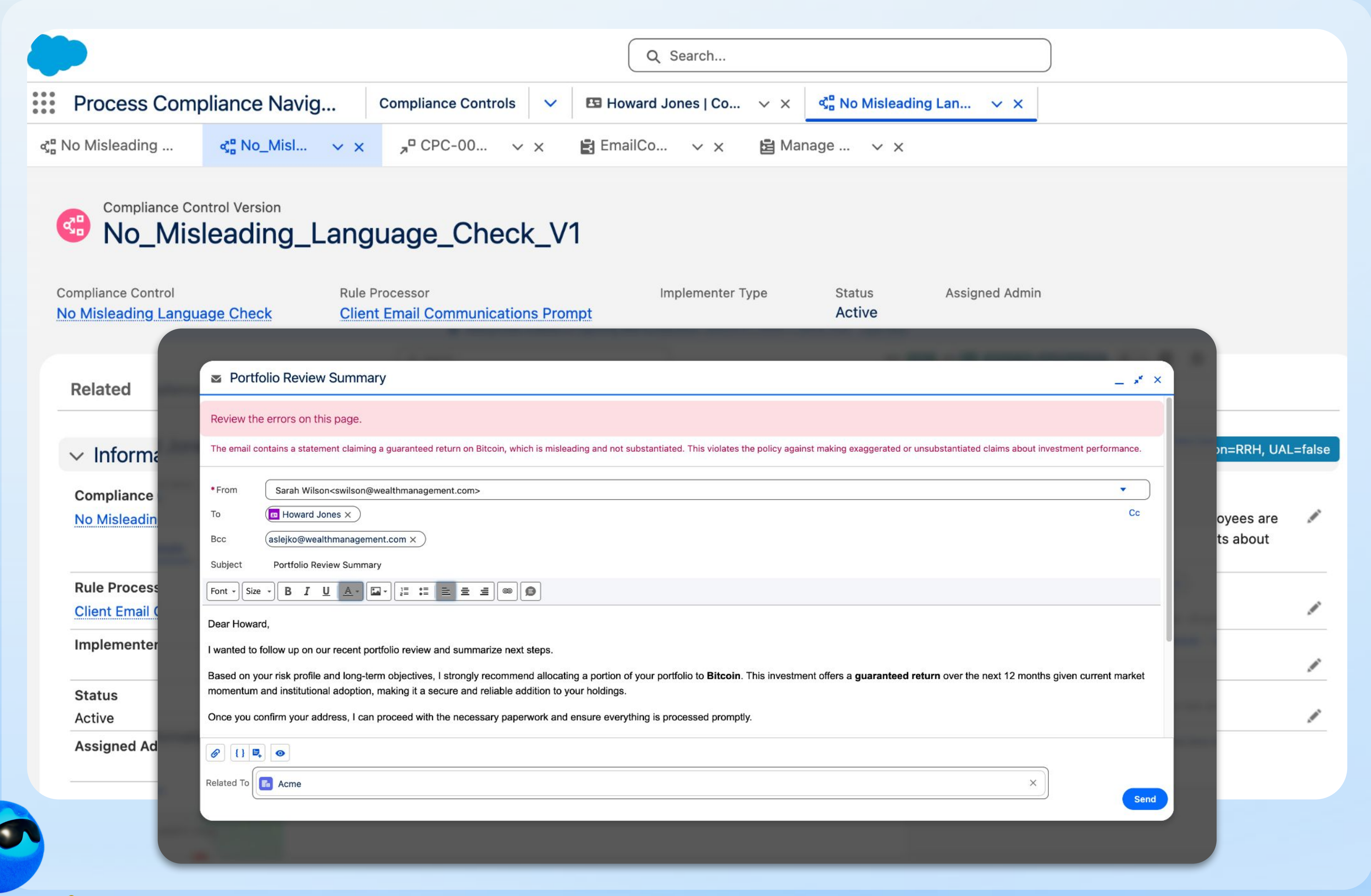
Process Compliance Navigator

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.



Any unreleased services or features referenced here are not currently available and may not be delivered on time or at all. Customers should make their purchase decisions based upon features that are currently available.

Unify Risk Frameworks and Business Process Execution

Key Features in AI Features

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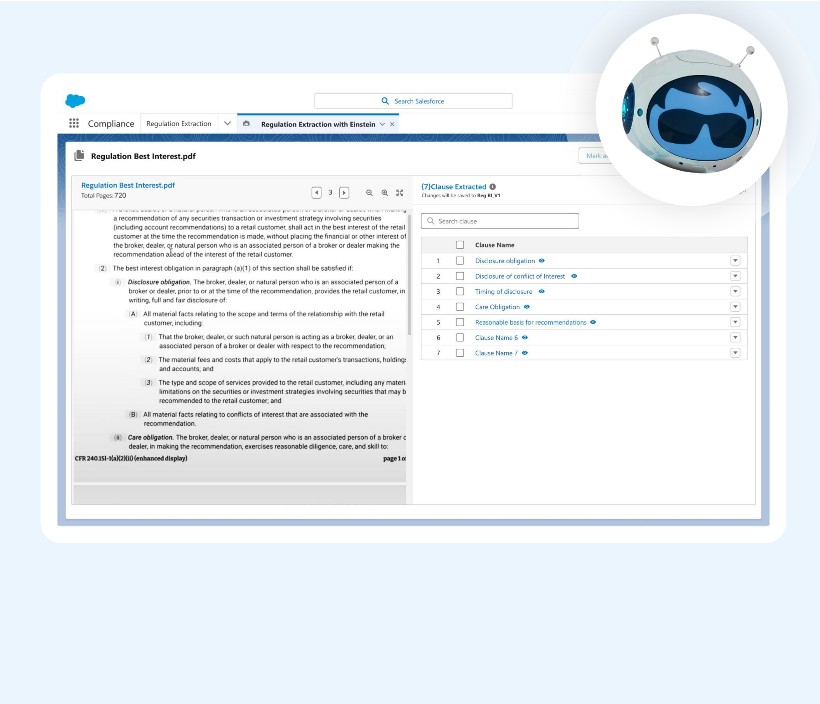
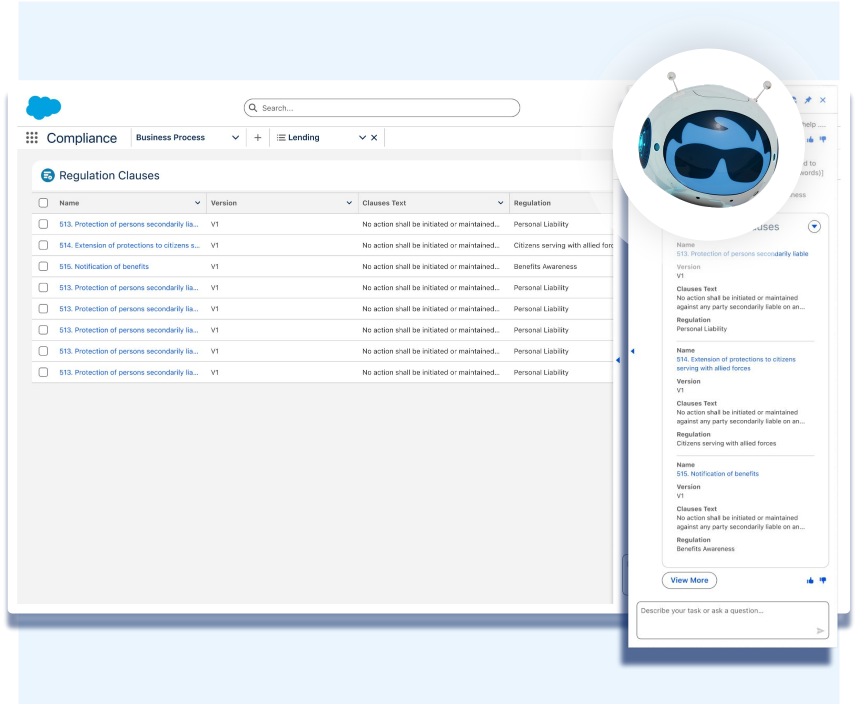
What's new?



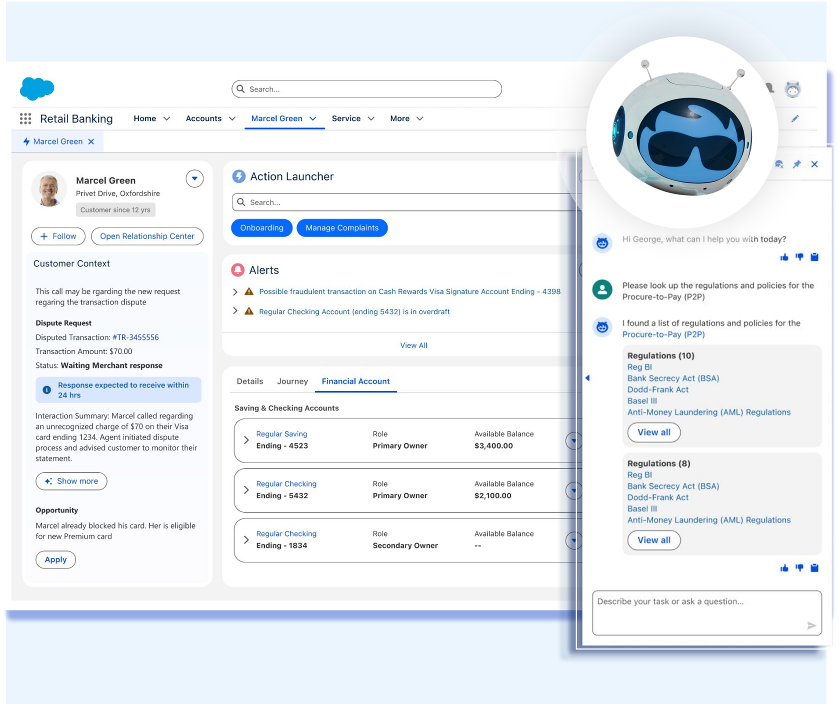
AI-Assisted Clause Extraction

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



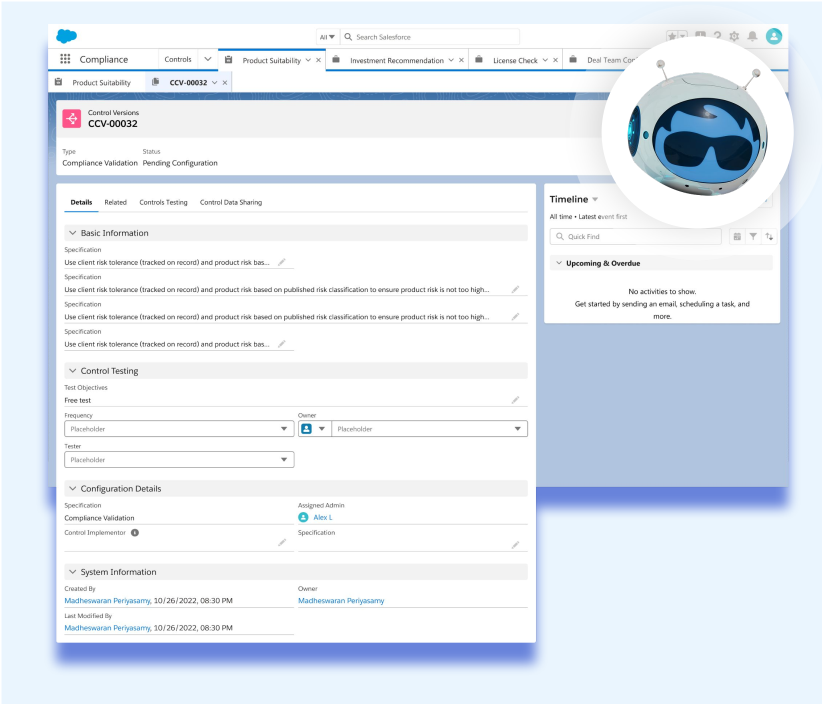
AI Impact Analysis

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 wor



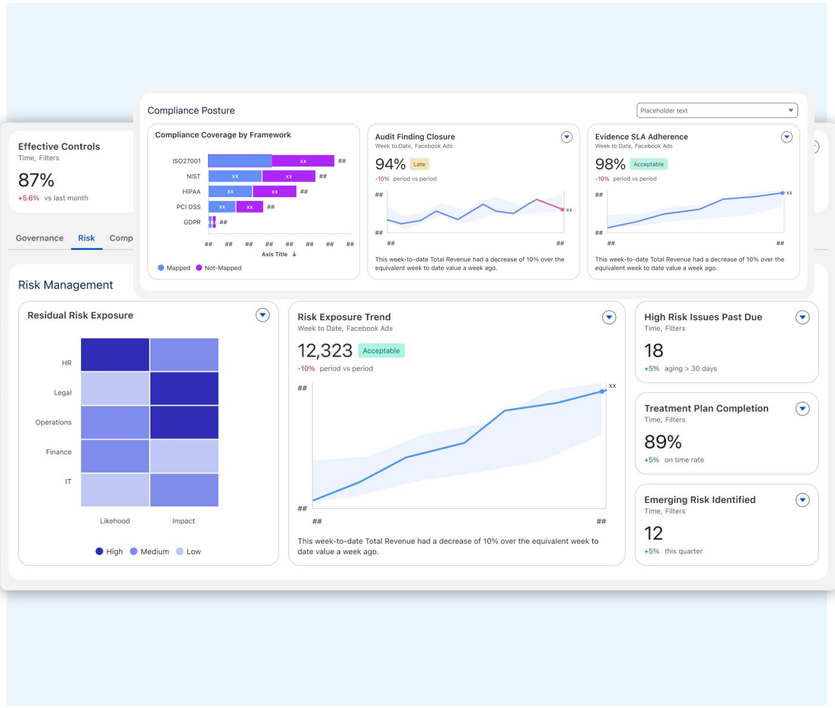
Natural Language Policy Controls

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

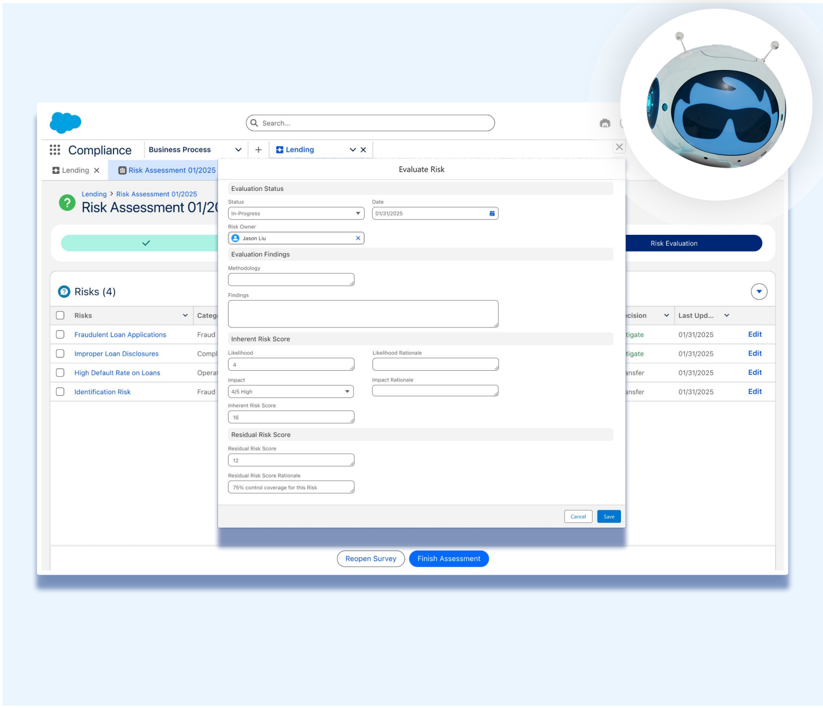
Key Risk & Policy Management Features

What's new?



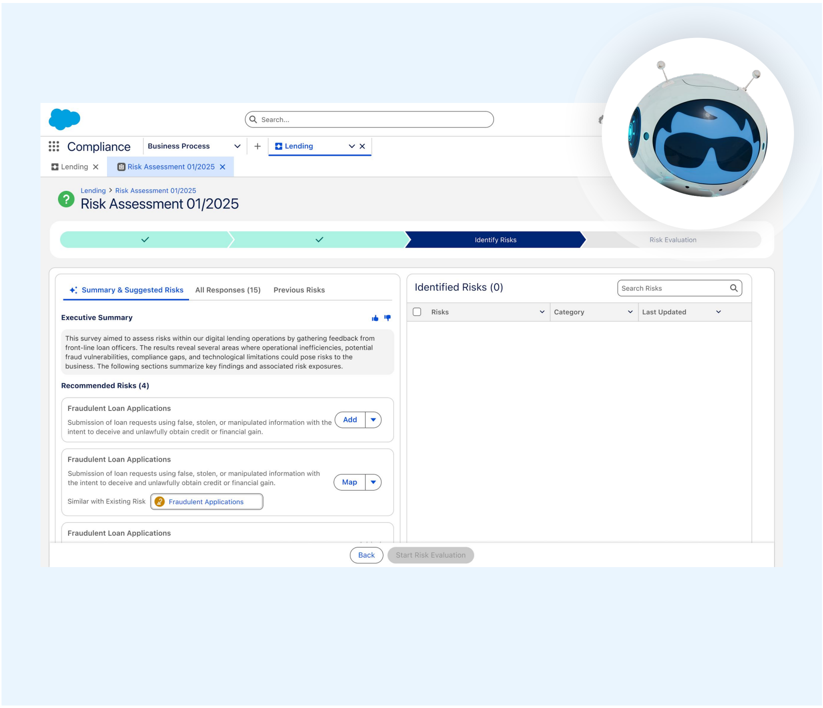
Risk and Compliance Dashboards

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.



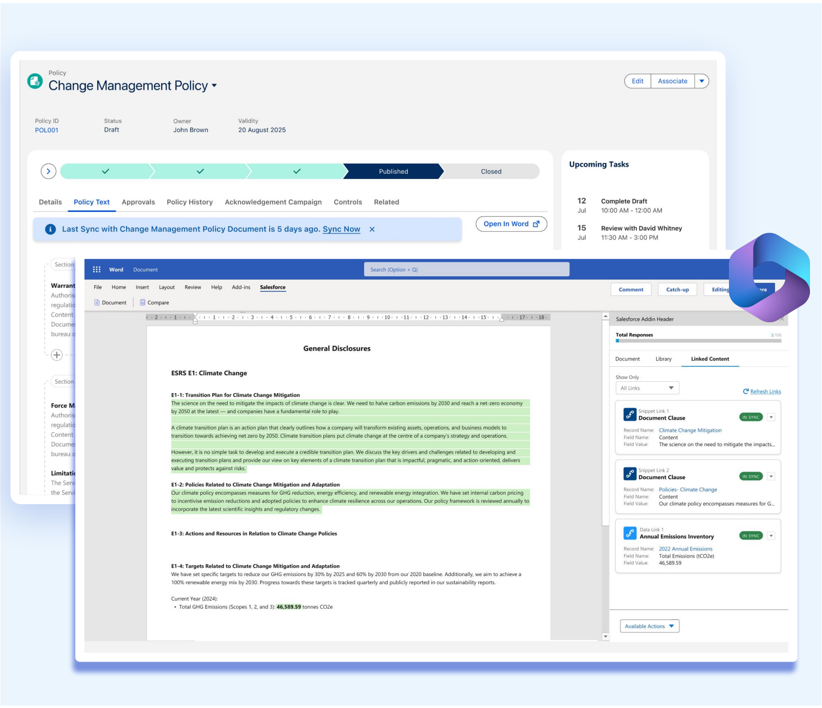
AI-Assisted Risk Assessment

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

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.

Define & Revise Policies

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

Implement Controls

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.

Enforce Compliance

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.

Remediate & Monitor Risk

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.

Audit & Report

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

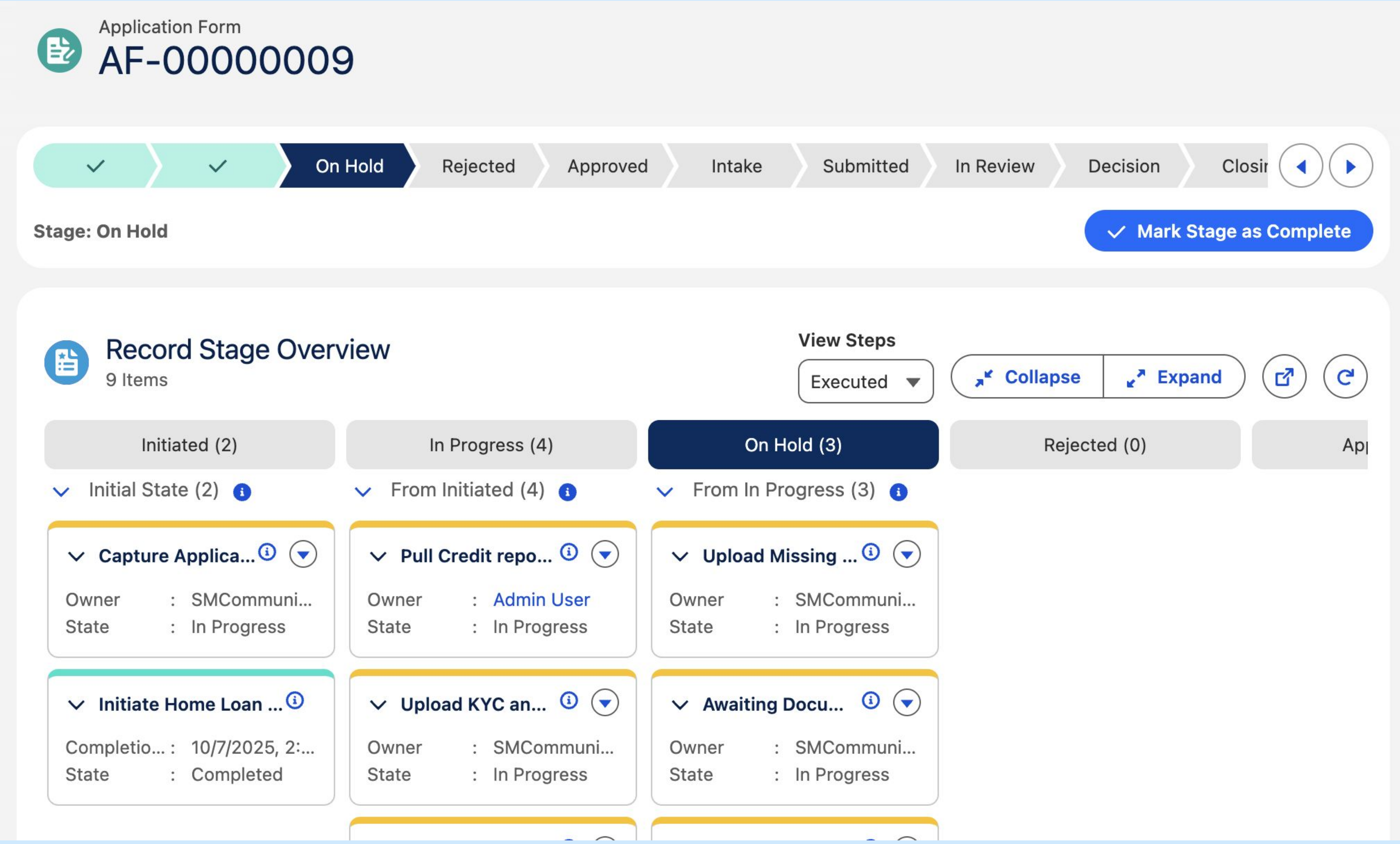
Salesforce Digital Origination *(Formerly called Digital Lending)*

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

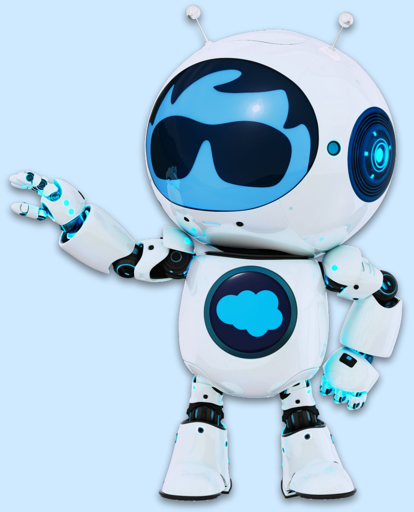
Digital Origination for Deposit Accounts | **GA Jun 26**

Intelligent Document Validation | **Upcoming**

AI Powered Underwriter Console | **Upcoming**

Söderberg & Partners

30% Increase in advisor productivity



Source: FY26 Customer Success Metrics

salesforce

Increase your Deposits with Faster, Smarter Account Opening

Launch Ready-to-Use Digital Origination for Deposit Accounts

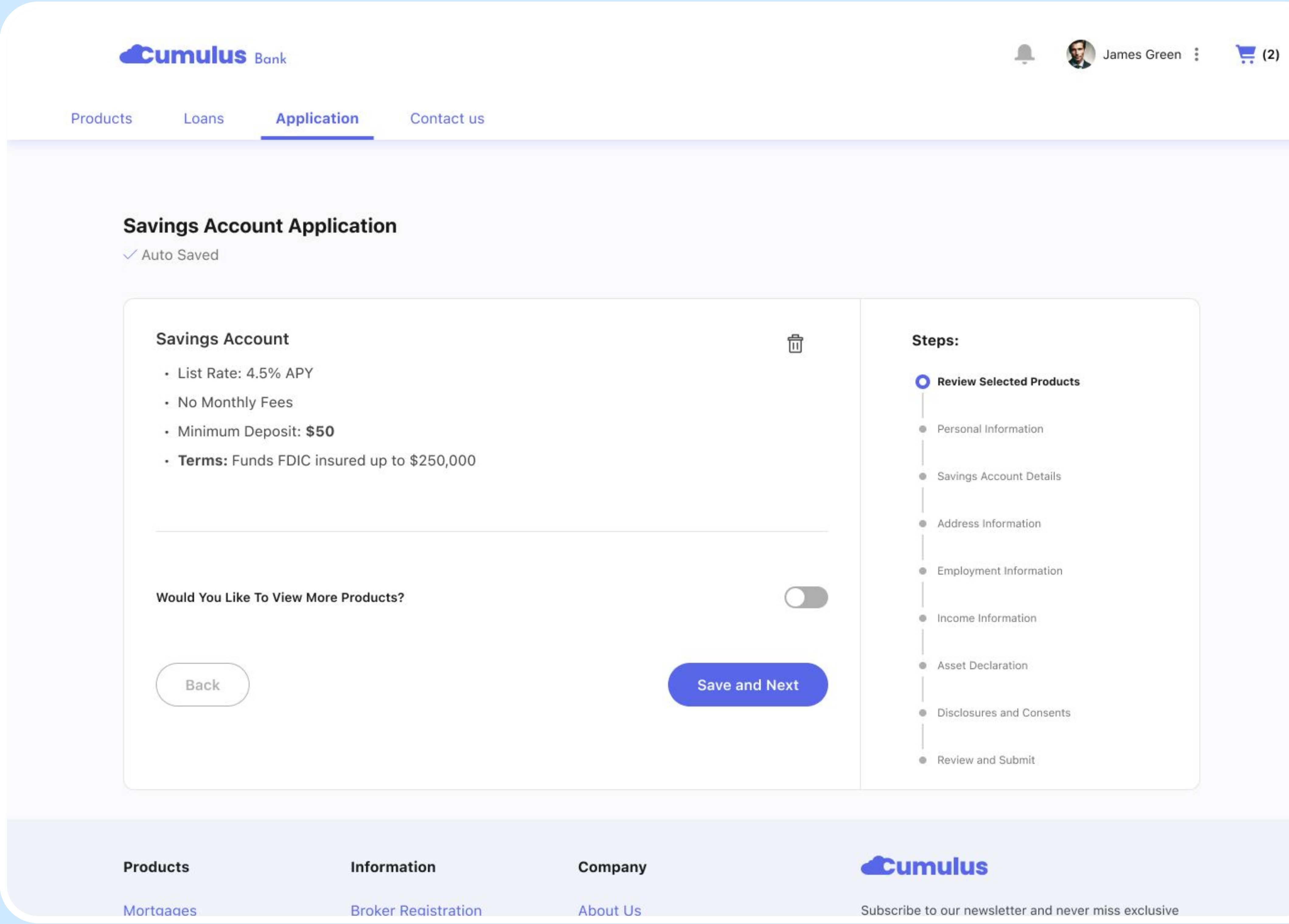
Deploy simple, pre-built templates that let customers open new accounts on their own from anywhere. Remove the need for physical branch visits and paperwork, making first impressions effortless.

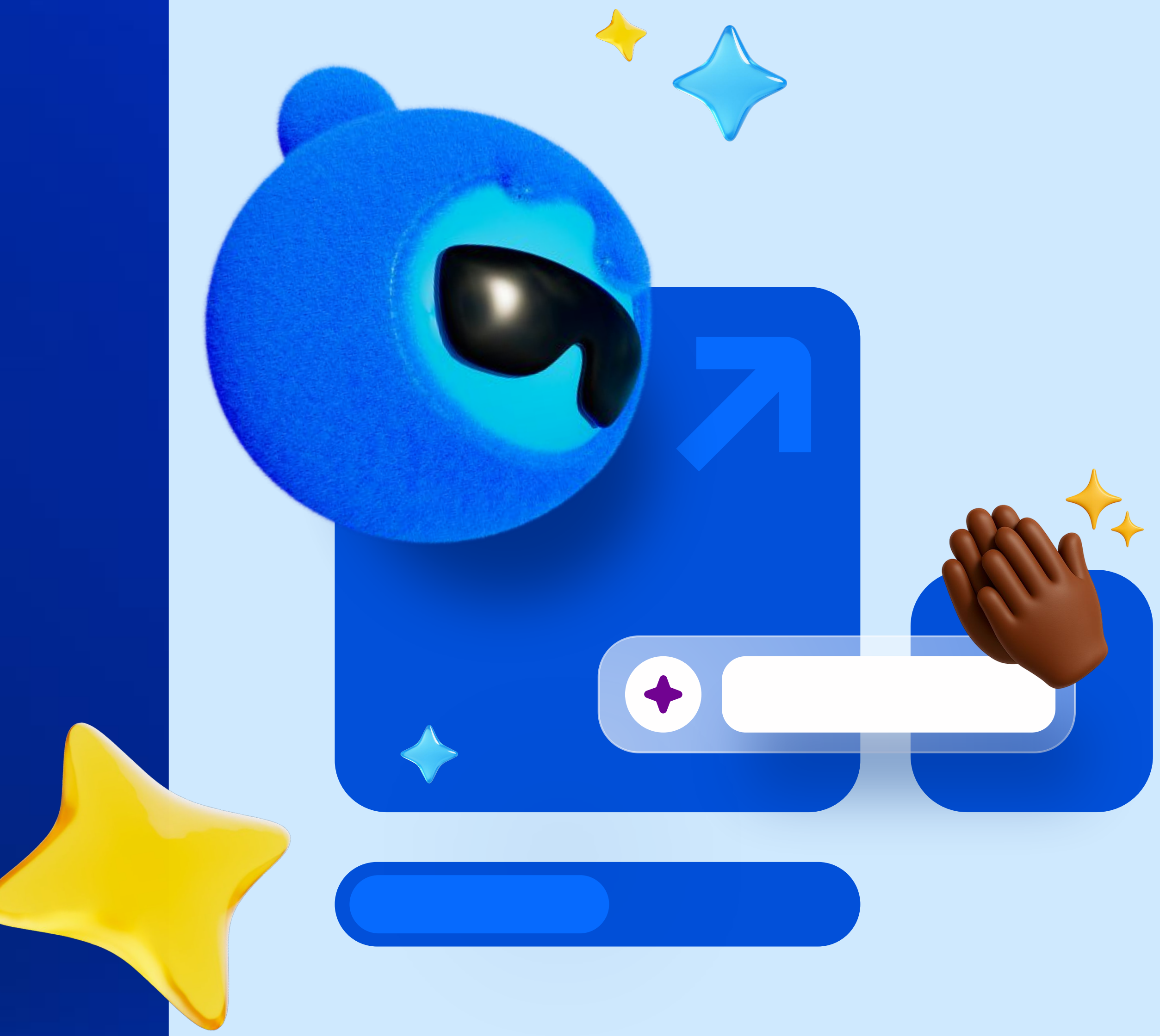
Remove Verification Delays

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.





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”

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.

Source: IDC, 2025

Digital Insurance

Insurance Foundations

Enhancements

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

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

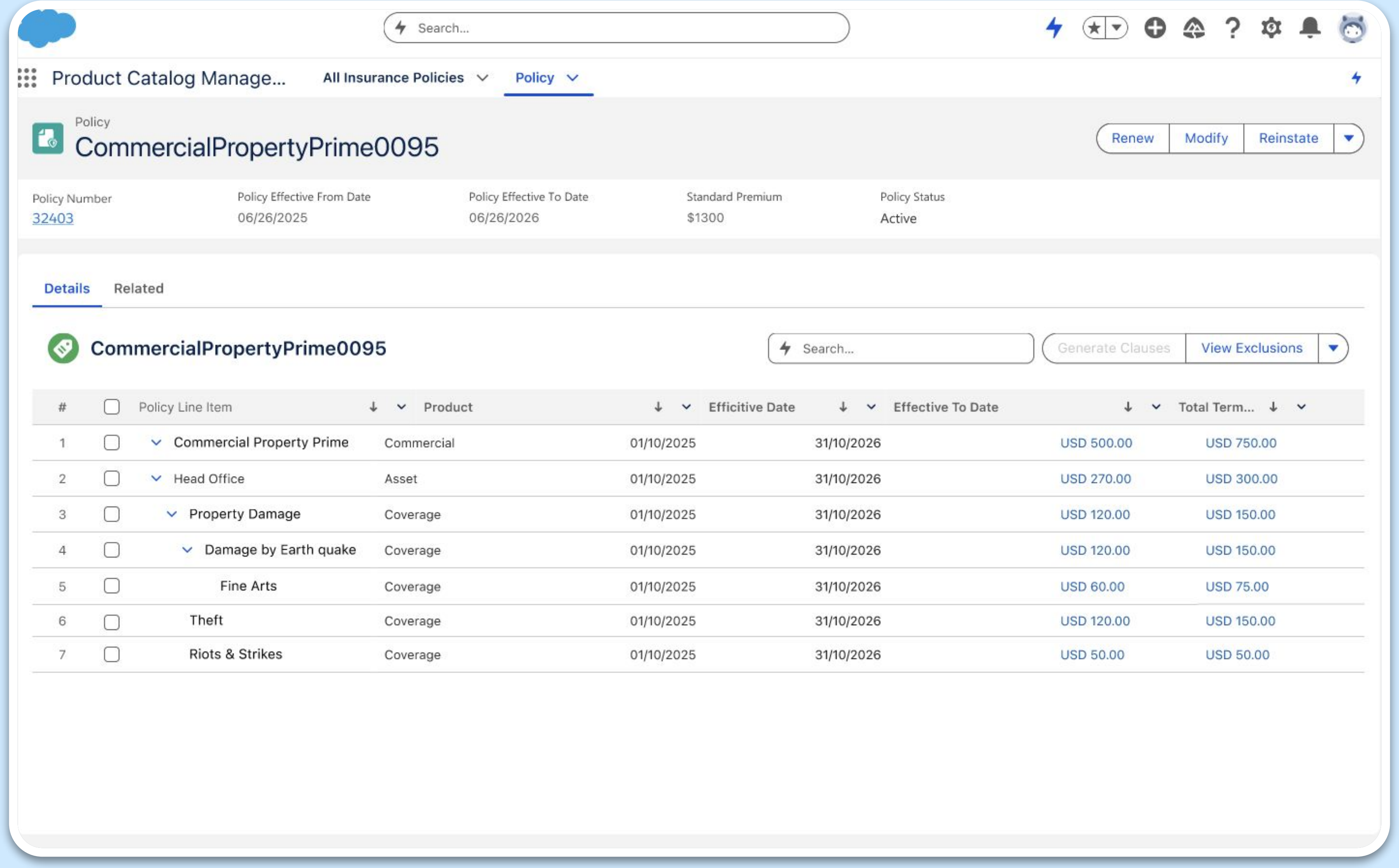
Eliminate manual workarounds with automated endorsements, exclusions, and financial roll-ups that maintain accuracy across up to five levels of nested coverage.

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

Claims Management Enhancements

Increase financial precision and operational scale

Bulkification of Claims Payment API

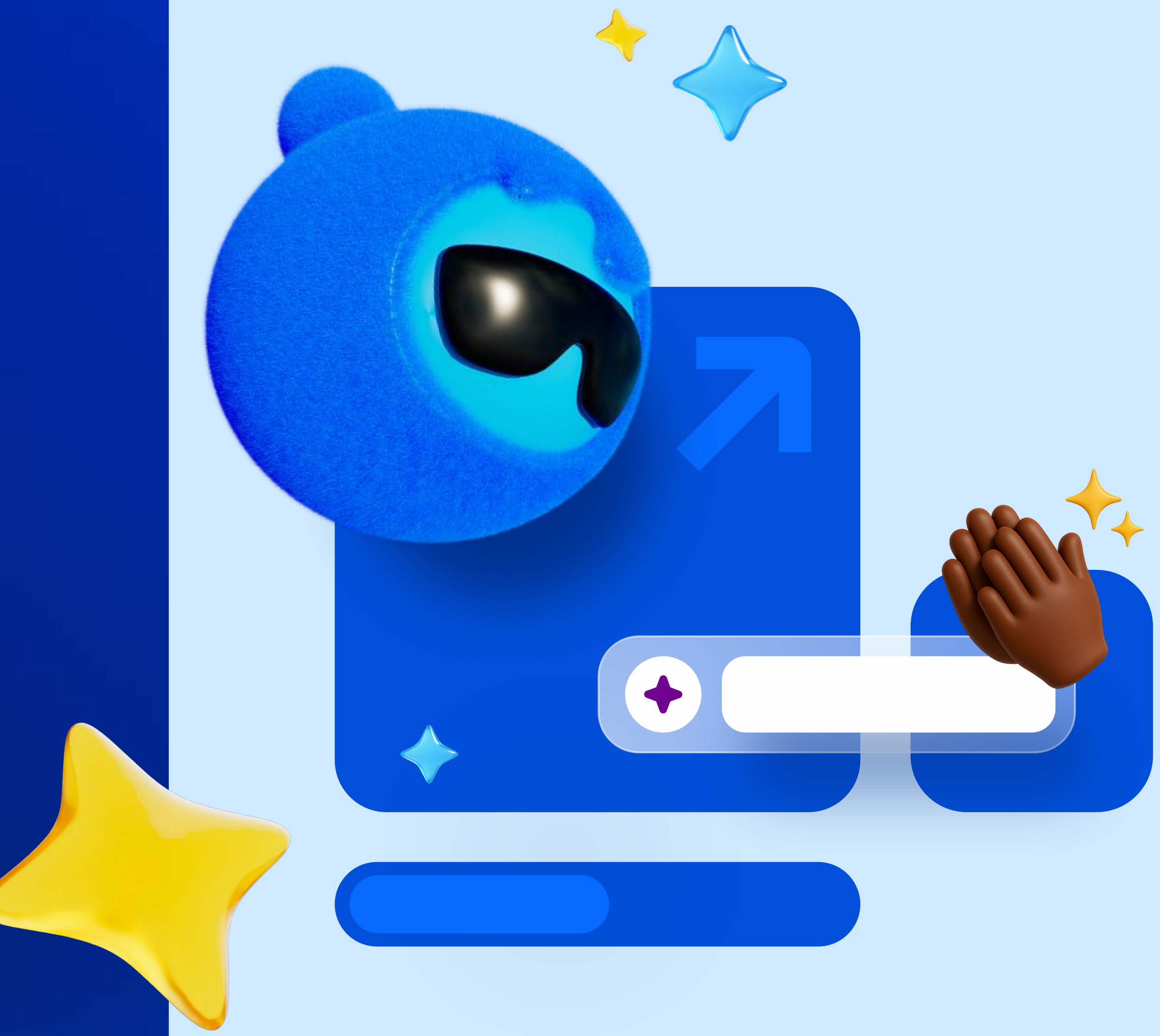
Processes up to 18,000 payment records across multiple claims and policies simultaneously via asynchronous bulk execution while natively maintaining all limit checks, validations, and custom calculations.

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

Salesforce Go: Vision

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