



Empower Teams and Delight Borrowers by Humanizing the Recovery Experience

The number of accounts falling into serious delinquency is doubling every year, legacy collections processes are falling short. Traditional systems often lead to fragmented data, high specialist turnover, and adversarial interactions, where 69% of borrowers don't even receive information to verify their debt.

Salesforce Collections & Financial Recovery empower organizations to recover overdue payments and minimize collections costs through a configurable, intelligent, and seamlessly integrated Collections Application with advanced automation, AI, and personalization capabilities.



Agentic Collections and Recovery



Contact us to learn more about the Collections and Financial Recovery.

salesforce.com/collections-and-recovery



Here's how it works.

- 1 Predict & Prevent**
Spot risk early and engage borrowers proactively before a missed payment occurs
- 2 Unify Visibility**
See the complete borrower financial picture by replacing fragmented, legacy systems with a single platform
- 3 Empower Collection Specialistss**
Equip your teams with AI, data, and guided workflows to drive successful recoveries and reduce specialist burnout

Why Choose Salesforce Collections & Financial Recovery?

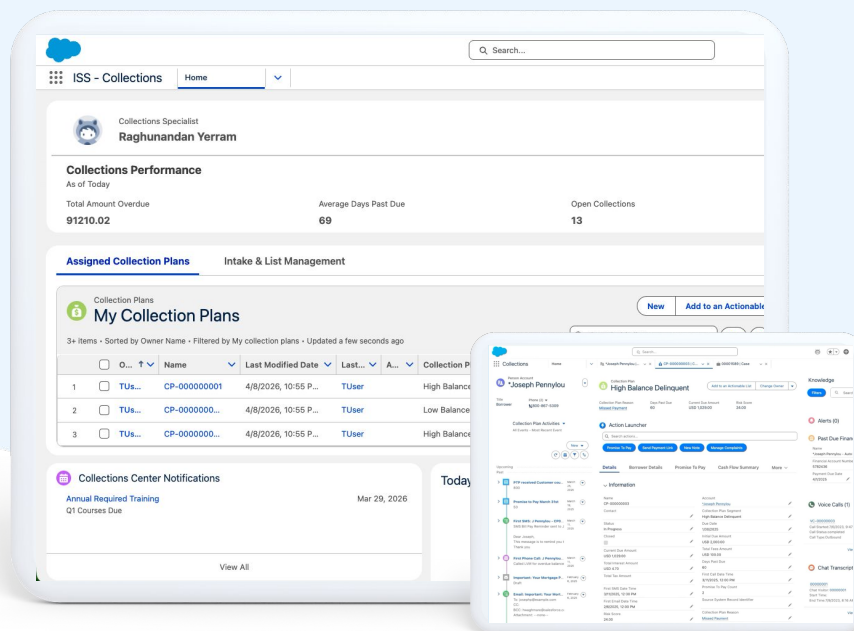
- Holistic Borrower View**
Unify all borrower's debts, financial accounts, and interaction history into a single console, giving the specialist a complete picture before every conversation
- Real-Time Specialist Guidance**
Guide every interaction with AI-driven talking points & next-best actions, empower specialists to navigate complex conversations with empathy and compliant manner
- AI-Powered Prioritization**
Use AI to automatically score and prioritize cases based on recovery likelihood, ensuring specialists focus their time on the most valuable accounts first
- The Single Source of Truth**
Create a unified platform for the entire recovery lifecycle, from front-office specialists to back-office legal teams, ensuring everyone is working from the same information
- Connected Recovery History**
Provide a complete, timeline of every touchpoint across every channel so the borrower never has to repeat their story and specialists have full context
- Guided, Compliant Workflows**
Launch guided processes –from structuring a promise-to-pay to sending a payment link–with a single click, reducing errors and increasing efficiency



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Collections and Financial Recovery



Scalable AI-Driven Collections and Recovery

Supercharge collection specialist's productivity and accelerate recovery rates with AI-driven workflows that prioritize positive customer experiences.

Action Launcher

Allow collections specialists to launch actions quickly based on borrower responses. Action launcher can now automatically launch actions based on keyword detected via phone and chat

Audit Trail

A comprehensive, chronological record of every action taken on a delinquent account. Maintains regulatory compliance and ensuring transparency during the debt recovery process. Easily show update to and changes made to financial accounts

Automation Templates

Accelerate standard recovery workflows with pre-built, customizable templates for Promise to Pay, Pay Now, and more designed to drive efficiency

Collections Agent Console

Single console to view data from multiple systems with pre-built integration and embedded recommendations to personalize collections conversations and drive efficiency

Collections Bulk Actions

Bulk assignment and deletion of collection records actions in an actionable list to trigger processes like an account debit or revision to a collections case prior to needing formal outreach

Collections Case Management

Simplify the management of cases related to specific collections activities by consolidating multiple cases into a single, comprehensive collection

Collections Compliance & Controls

Built-in customizable controls to ensure your collections processes remain compliant – whether they are managed by a human or Salesforce collections agent

Collections Customer Assistance 🗣️

Serve customers faster and collect more efficiently with this AI Collections Agent designed to service borrowers and collect 24/7 to scale support and recovery efforts without adding headcount

Collections Employee Assistance 🗣️

AI agents pre-built to understand the complex world of collections and designed to automate manual work to allow human collections specialists to focus on turning high-emotion moments into successful opportunities to collect and build customer loyalty

Collections Interaction Outcome

Easily capture collections outcomes linked to a collections case

Collections Legal Letter Templates

Eliminate manual work by instantly generating correspondence templates to support legal processes from pre-built templates

Collections Marketing Cloud Integration

Easily create outreach campaigns for sending personalized collections via marketing cloud growth edition

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Collections Recovery Portal

Give your collections specialists a 360-degree view of every borrower and transforms large caseloads into actionable insights, helping your team work smarter and maximize recovery rates

Collections Segmentation

Input and categorize collections segments in bulk

Consolidated Collections

Provide a single view of all outstanding collections accounts to enable faster more effective conversations

Contact Prioritization

Einstein predictive model used to identify and score cases based on likelihood to make contact and recoup funds.

Core Banking Integration

Connect to third-party systems with easy integrations and execute core banking processes directly in Collections & Financial Recovery

Dailer Integration

Eliminate manual effort by leveraging Service Cloud and Amazon Connect to power automated dialing, ensuring collection specialists bypass busy signals to connect instantly with live borrowers

Einstein Prediction Builder

Configurable Einstein model to predict delinquency and classify loans by severity of default

Engagement & Timeline

All information related to in-person meetings (engagements) and correspondence and an interactive timeline of client information

Flex Cards

Easy to figure and display data

Identity Verification

Verify the identity of a borrower before you share any sensitive information with them

Intelligent Collections Case Scoring

Automatically score and prioritize cases, allowing collections team to focus on the most recoverable accounts first

Loan Management System Integrations

Integration with debt servicing and loan management systems end-points (direct or via Mulesoft)

Outreach Automation

Orchestrate collections campaigns and segments based on likelihood to and account currently in default

Payment Restructuring

Allow specialists to resolve accounts faster by easily restructuring payment terms within pre-defined company policies

Process Automation Studio

Build end-to-end collections processes with low/no code tools

Promise to Pay Flow

Systematically record the borrower commitment to clear outstanding due via dedicated screen flow and data model objects

Promise to Pay Widget

Easily configure and track promise to pay with reminder, escalations, and configure based on loan/invoice type and amount

Record Alerts

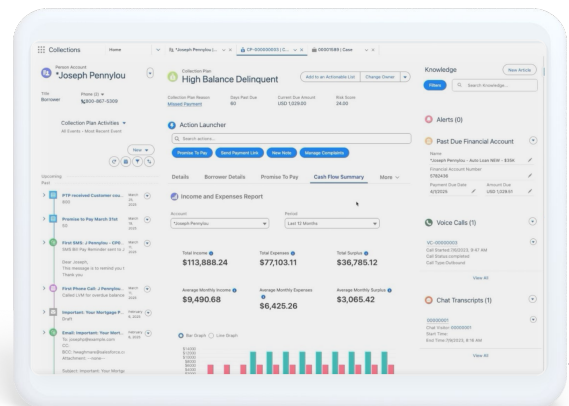
Alerts from third-party systems that can trigger workflows in Collections & Financial Recovery

Salesforce "Pay Now" Integrations

Allow collections specialists to generate payment links that direct customers to a mobile-responsive web page where they can make immediate payments

Talking Points 🗨️

Increase collections specialists throughput by leveraging generative AI to suggest context aware talk track



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