



Transform Service into Trust and Loyalty

Here's how it works.

Go beyond just resolving common service issues quickly. With automation and AI built specifically for financial services out-of-the-box, you can deliver the hyperpersonalized interactions and prompt resolutions customers expect at scale, ensuring they leave every conversation feeling seen, heard, and deeply loyal.



Deflect Cases with Intelligent Self Service

Make resolving common service issues and finding key answers effortless via self-service. Improve satisfaction and lower your cost to serve, positioning your financial institution as the trusted place for advice and resolution, not a public AI model.

Resolve Issues Quickly in the Contact Center

Make your CSRs' jobs easier by scaling the habits of your top performers with AI. Resolve issues faster using pre-built workflows grounded in the customer's complete financial picture, ensuring highly personal, consistent service while remaining in compliance..

Automate Service Operations & Investigations

Take the friction out of processing complex financial requests like transaction disputes, complaints, and claims. Use automation and AI to simplify upfront information gathering and eliminate manual handoffs, driving complete transparency and consistent execution so a critical back-office step is never missed

Drive Performance, Growth & Proactive Loyalty

Turn your reactive cost center into a proactive profit center. Spot service bottlenecks early, guide meaningful coaching, and make banking, wealth, or lending referrals seamless so everyday service interactions naturally lead to their next financial product.

See what's included in this solution:

Trusted Autonomous Self-Service: Deflect routine requests securely using AI grounded strictly in your institution's approved policies.

Seamless Omni-Channel Engagement: Deliver continuous, cross-channel experiences. Equip CSRs with unified view to pick up the conversation where it left off

Pre-Built Service Processes
Accelerate resolution using out-of-the-box workflows for complex financial services processes like complaints, claims, and transaction disputes

Industry-Specific Service AI Agents: Deploy ready-to-use AI agent templates, topics, & actions built specifically for banking customer service, insurance, and employees.

How can automated and AI -powered service help your financial institution?



Inquiries can be resolved by AI

[Gartner Research Press Release 2025](#)



Productivity increase for FINs teams

[Bain & Company Technology Report](#)



Reduction in operational costs

[NVIDIA State of AI in Financial Services, 2026](#)

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Deflect

Intelligent Self-Service

Position your financial services institution as the primary source for advice and resolution while reducing cost-to-serve via digital-first channels.

Banking Customer Service Agent

Provide secure, conversational self-service that answers common financial services and account queries as well as handles common service issues across any channel, available 24/7.

Banking & Insurance Self-Service Portals

A branded, traditional self-service portal where clients access a searchable library of articles to find answers and resolve issues before creating a case.

Autonomous Scheduling

Enable clients to book branch appointments or consultations with financial advisors instantly through AI agents, improving accessibility and driving high-value branch traffic.

AI-Enhanced Self-Service for Financial Services

Transform static FAQs into interactive AI-powered answers with instant summaries and contextual guidance

Knowledge Base Self-Service

Provide a comprehensive, searchable library of FAQs and "how-to" guides, allowing customers to resolve common banking or insurance issues quickly on their own.

Workflow-Based Bots

Resolve routine banking inquiries using structured, rules-based workflows and pre-defined decision trees to guide customers through simple, repetitive service tasks automatically



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Intake



Modernize the Contact Center

Equip CSRs with unified data and AI-powered assistance to deliver hyperpersonalized, high-speed service across every interaction.

CSR Service Console

Unify the 360-degree customer view, financial history, and AI insights into one screen to deliver seamless, highly personalized service for every customer

Action Launcher

Launch compliant, guided workflows like fee reversals, card replacements, or policy updates with a single click to ensure fast, accurate, and regulated resolution.

Flex Cards (Omnistudio)

Display real-time holdings, policy details, and transactions at a glance, giving CSRs the critical data needed to solve issues without toggling between systems.

Record Alerts

Instantly flag high-value clients, potential churn risks, or compliance warnings on-screen so agents can proactively prioritize and protect your most important relationships.

Banking Employee Service Agent

An internal AI assistant that executes routine banking service tasks and summarizes customer history, financial details, and past conversations to increase CSR productivity

Insurance Service Agent

Empowers insurance reps with AI-driven policy summaries and step-by-step guidance for common transactions like processing quotes, reducing manual effort and handling times.

Interactive Timeline

View past engagements, claims history, and life events chronologically to give every conversation immediate context without forcing the customer to repeat their story.

Service Cloud Voice

Integrate phone systems with real-time AI transcription to reduce wrap-up time and ensure airtight regulatory compliance for every banking and insurance call.

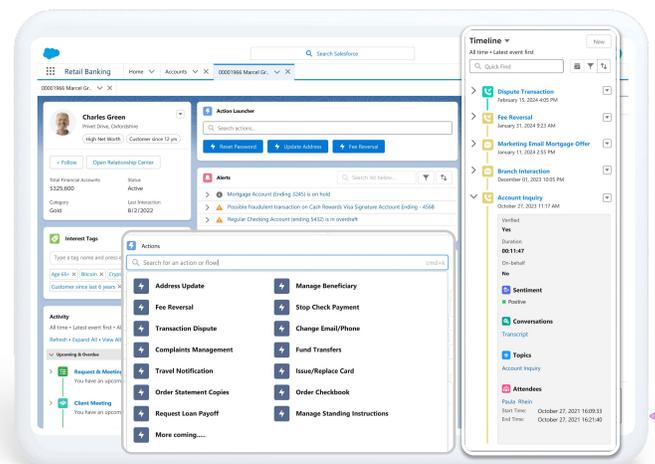
Reply Recommendations

Draft chat and email responses that follow compliance guidelines instantly with AI-generated suggestions based on your institution's approved voice and specific financial product guidelines.

1.4x more likely to achieve a highly successful AI implementation when organizations integrate their service data into one unified platform*

72% of financial institutions now cite AI as a top strategic priority to combat rising contact center costs*

20% overall productivity gain across financial services firms using AI tools*



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Intake

Modernize the Contact Center

Equip CSRs with unified data and AI-powered assistance to deliver hyperpersonalized, high-speed service across every interaction.

Financial Accounts & Households

Gain a complete view of a customer's total financial footprint, including bank accounts, investment holdings, and household relationships, to drive deeply personalized service

Financial Services Data Models

Leverage out-of-the-box industry architectures that organize complex financial data instantly, ensuring your team works from a consistent, compliant, and unified record

Life Events & Milestones

Capture and visualize major life changes like marriage or home buying, enabling agents to offer proactive, empathetic advice that builds long-term loyalty.

Identity Verification

Securely verify customer identities and validate transaction details directly within the console before sharing sensitive data, reducing fraud and ensuring regulatory compliance.

Discovery Framework

Streamline "fact-finding" and needs analysis using compliant, questionnaire-driven tools that gather the right data to provide tailored financial recommendations.

Guided Intake

Use structured, step-by-step screens to capture all necessary information correctly the first time, ensuring faster processing for complex banking or insurance requests.

Social Customer Service

Monitor and respond to customer questions, complaints, and mentions across social media platforms directly from the unified service console.

Omnichannel Routing

Automatically distribute incoming customer inquiries across all digital and voice channels to the most available, skilled, and appropriately licensed specialist

Person Accounts

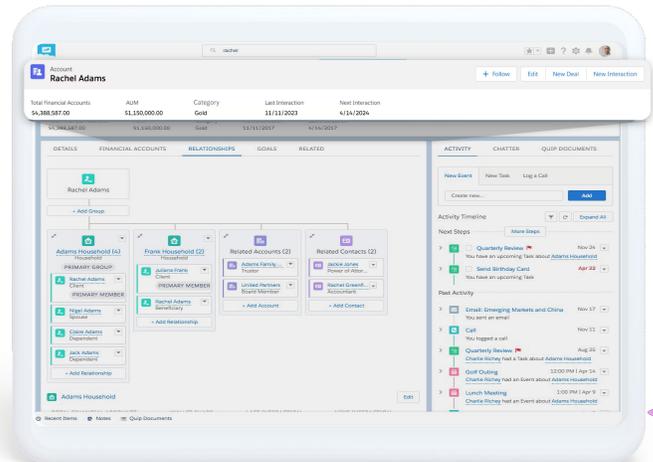
Combine account and contact data into one unified record designed specifically for managing individual retail consumers, such as personal banking clients or individual policyholders.

Live Agent Chat

Engage with customers in real-time through secure, embedded web and mobile chat to provide immediate assistance and deflect expensive phone calls.

Unified Knowledge

Break down information silos by connecting external data sources into Salesforce, giving agents one search bar for all banking policies and procedures.



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Process & Resolve

Transparent and Connected Service Operations

Streamline complex back-office workflows and centralize operational assets to ensure consistent, compliant, and transparent service delivery.

Unified Catalog

An AI-ready platform to build and deploy agentic or human workflows, centralizing all financial products and service definitions for consistent cross-channel execution.

Case Escalation & Queues

Automatically prioritize and route critical client issues to the right experts, ensuring high-value requests never sit idle or bypass necessary management oversight.

Stage Management

Simplify complex business processes by defining clear stage transition criteria, giving teams greater visibility and control over the progress of every financial request.

Transaction Dispute Management

Streamline the dispute lifecycle with automated chargebacks and partner connectivity to resolve card issues and unauthorized transactions in record time with total transparency.

OmniStudio

Rapidly build and deploy guided, dynamic digital experiences and complex industry workflows without writing custom code using a powerful suite of drag-and-drop UI and data tools.

FlexCards (OmniStudio)

Build data-rich, actionable UI components that display critical customer information from multiple sources, allowing agents to launch processes directly from a single card.

Integration Procedures (OmniStudio)

Execute multiple data actions—like calling a core banking API and updating Salesforce—in a single server-side call to maximize performance and minimize latency.

Data Mappers (OmniStudio)

Declaratively read, transform, and write Salesforce data to supply your OmniScripts and FlexCards with the exact information needed for every service interaction.

OmniScripts (OmniStudio)

Design guided interactions that lead customers or employees through complex financial processes with conditional logic and real-time data validation

Data Processing Engine

Extract, transform, and aggregate massive volumes of complex financial data at scale to power advanced rollups, territory calculations, and analytics directly within the CRM.

Document Management

Securely organize and track critical financial documents, ensuring version control and audit readiness while eliminating manual search time for back-office teams.

Case Management

The foundational system of record for every customer request, providing an auditable, end-to-end history of all banking and insurance service interactions

SLAs & Entitlements

Guarantee contractually obligated service levels by automatically tracking and flagging cases that risk breaching internal turnaround times or strict regulatory deadlines.

Integration Orchestration

Break down silos by orchestrating real-time data flows between Salesforce and core banking systems, ensuring legacy data is available for every automated service process.

Complaint Management

Turn regulatory requirements into loyalty-building experiences by ensuring every grievance is tracked, managed, and resolved according to strict financial services regulations.





Process & Resolve

Transparent and Connected Service Operations

Streamline complex back-office workflows and centralize operational assets to ensure consistent, compliant, and transparent service delivery.

Case Routing

Intelligently direct requests to the exact specialist required based on skill, capacity, and complexity to reduce wait times and improve resolution.

AI Autofill for Financial Services

Eliminate manual data entry by automatically populating records from documents or transcripts, significantly reducing errors and accelerating total case resolution time.

Timeline & Engagement

A chronological visualization of every interaction providing deep contextual awareness immediately, allowing agents to understand the full customer journey at a glance

Business Rules Engine

Automate intricate financial policies and eligibility checks to ensure every transaction follows internal guidelines and external regulations automatically and consistently.

Action Plans

Standardize operations with automated, repeatable task checklists that ensure consistency and compliance for complex, multi-step financial processes.

Flow Orchestration

Automate multi-user, multi-stage financial processes from start to finish, coordinating approvals across departments for frictionless, end-to-end service delivery.

Flow Builder

Automate complex business processes using a visual, drag-and-drop interface, allowing you to build multi-step workflows without writing custom code

Data Consumption Framework

Seamlessly aggregate and display data from external core systems (like banking ledgers or policy administration) directly within the CRM without needing to duplicate records

Case Milestone Tracker

Monitor service level agreements (SLAs) with visual countdowns and automated alerts to guarantee every customer issue is resolved on time.

Disclosure & Consent Management

Design guided interactions that lead customers or employees through complex financial processes with conditional logic and real-time data validation

Automated Email Templates

Use pre-approved messaging libraries to ensure brand-compliant communication while dramatically accelerating response times for routine banking and insurance inquiries.

Work Order Management

Create, track, and coordinate complex service requests that require multi-department collaboration, specialized processing, or field service execution.

Integrated Alerts

Proactive system nudges that prevent missed deadlines and immediately flag critical account updates to ensure timely responses and risk mitigation.

Cross-Object History Log

Gain instant visibility by rolling up historical changes from dozens of related child records into one unified, easy-to-read timeline directly on the parent record.

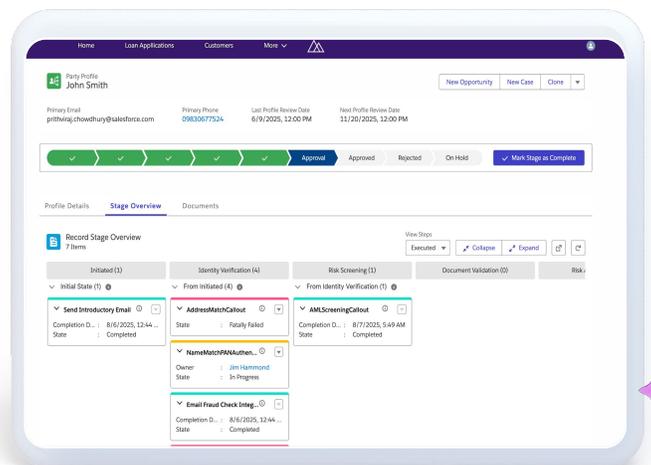
Service Process Library

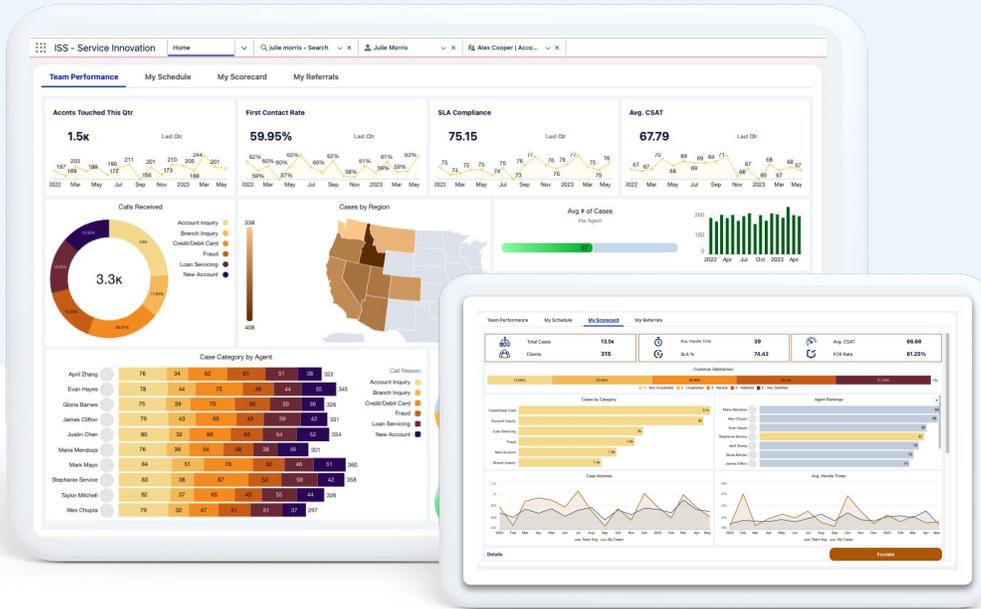
Access 30+ pre-built service processes:

Banking: Address Update, Card Activation, Card Replacement, Close Account, Fee Reversal, Order Checks, Stop Payment, Travel Notice, Dispute Transaction (Credit/Debit/ACH), Lost/Stolen Card Reporting, Fraud Reporting, Limit Increase Request.

Insurance: First Notice of Loss (FNOL), Add/Remove Beneficiary, Add/Remove Driver, Cancel Policy, Evidence of Insurance Request, Policy Loan Request, Policy Surrender, Beneficiary Change, Address Change, Update Payment Method.

Wealth: Distribution Request, Standing Instruction Setup, Risk Profile Update, Address Update, Beneficiary Change, Account Opening/Onboarding, Asset Transfer Request, Goal Profile Update.





Refer & Improve

Performance and Growth in Service

Turn service data into a strategic opportunity for customer retention, operational efficiency, and proactive revenue generation.

Referral Management

Capture and track high-quality referrals across departments, ensuring wealth, lending, and insurance opportunities are routed to the right specialist to maximize share-of-wallet and customer lifetime value.

Service Manager Dashboard

Equip leaders with real-time visibility into team performance, case volumes, and operational bottlenecks, enabling data-driven coaching and resource allocation to ensure consistent service excellence.

Conversation Mining

Analyze chat and voice transcripts at scale using AI to uncover exactly why customers are calling and identify hidden service friction points.

Workload Management

Automatically track and balance team capacity based on skills and availability, preventing burnout while ensuring that high-priority cases always move to the head of the queue.

Command Center

Give contact center leaders a real-time command center to monitor agent workloads, queue wait times, and active conversation sentiment to optimize team performance.

Customer Signal Intelligence

Use AI-driven sentiment analysis to detect experience breakdowns and churn risks across all channels, allowing managers to intervene proactively and preserve critical banking and insurance relationships.

Next Best Action

Use predictive AI to suggest the most relevant product or service during a live interaction, turning every service call into a personalized opportunity for cross-selling and retention.

Feedback Management

Deploy personalized, branded surveys natively in Salesforce to capture real-time customer sentiment, mapping responses directly to financial profiles for deeper insights into satisfaction and loyalty.

Real-Time Team Monitoring

Monitor live interactions across chat, voice, and digital channels to provide instant coaching or "whisper" support, ensuring every banker and agent remains compliant and effective..

Audit Trails

Automatically track and maintain a secure, time-stamped log of every change made to customer data and system configurations to ensure strict regulatory compliance and simplify internal oversight.

Contact us to learn more about the Agentforce Financial Services.

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Grow & Scale

The AF1FSC Enterprise Solution

Unlock the full power of the Salesforce ecosystem with the Agentforce 1 for Financial Services Cloud SKU, designed for total institutional transformation.

Agentforce (AI Agents)

Deploy autonomous AI agents that independently retrieve data, execute complex financial tasks, and resolve inquiries 24/7 within your specific regulatory guardrails, dramatically increasing your total service capacity.

Data Cloud for FSC

Unify structured and unstructured data from legacy cores and external sources into a single, real-time profile, providing the "brain" needed for hyper-personalized AI and automated service.

MuleSoft for Financial Services

Connect core banking systems via secure, industry-specific APIs and pre-built integration templates, ensuring that AI agents and human teams have real-time access to critical account and policy data.

Digital Origination Platform

Streamline the entire loan lifecycle from guided intake to automated underwriting and funding, delivering a faster, frictionless borrowing experience that wins market share and reduces operational overhead.

Process Compliance Navigator

Ensure every service interaction meets strict regulatory standards with built-in compliance checks and validation procedures that protect your institution from costly legal, regulatory, and non-compliance risks.

Digital Insurance

Manage the entire policy lifecycle—including automated claims processing, policy administration, and underwriting—on a single unified platform that streamlines operations and delivers a modern, frictionless experience for policyholders.

Collections & Recovery

Automate and humanize the recovery process with intelligent outreach and "Promise to Pay" tracking, reducing delinquencies while maintaining positive customer relationships during difficult financial periods for the client.

Agentforce Financial Services for Sales

Drive growth with a platform that natively understands financial services sales, with industry-specific AI to automate workflows, prep, and wrap-ups, Agentforce frees your sellers to focus entirely leading the loyalty-building conversations that fuel growth.

Informatica for Financial Services

Seamlessly manage high volumes of complex data from disparate enterprise systems with high-performance connectivity, ensuring your Salesforce environment remains the trusted, clean, and compliant "Single Source of Truth."

Slack for Financial Services

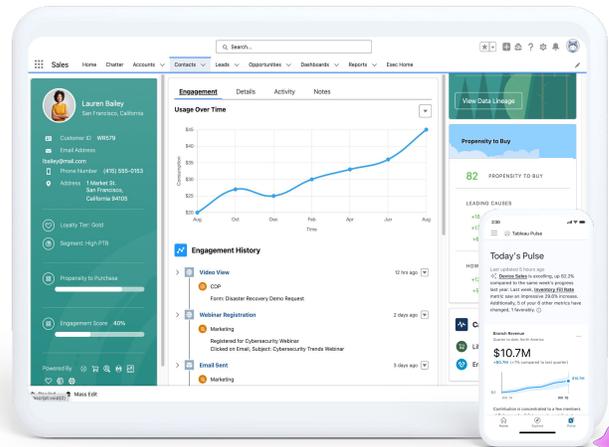
Bring teams and data together in a secure collaboration space to swarm complex cases, accelerate approvals, and improve internal workstreams across the front, middle, and back office.

Collections & Recovery

Deploy industry-specific analytics to monitor credit risk, visualize wealth management portfolio performance, and identify new insurance sales opportunities through AI-driven, executive-ready dashboards.

Insurance Brokerage

Empower brokers and account managers with a unified view of renewals, commissions, and policy books, using AI-driven insights to identify coverage gaps and retention risks before they impact revenue.





Intelligent Self-Service & Deflection

24/7 Intelligent Deflection

Respond instantly to routine inquiries using AI and knowledge bases, satisfying the 61% of customers who prefer self-service for simple support issues rather than speaking with a live agent.

Industry-Specific Processes

Empower clients to execute multi-step requests on their own by exposing pre-built workflows—like Address Updates, Travel Notices, or First Notice of Loss (FNOL)—directly in your digital channels.

Frictionless Human Escalation

Never leave a customer stranded. When complex financial issues arise, seamlessly transition conversations from AI agents to the right human specialist with full context and history intact.

Personalized Digital Experiences

Deliver personalized, authenticated portals that protect loyalty, directly addressing the reality that 64% of customers would consider switching to a competitor for a better digital self-service experience.

Core Solution Features

Feature	Financial Services Cloud Service Enterprise	Financial Services Cloud Service Unlimited	Agentforce 1 for Financial Services Service	Financial Services Specific Feature
Banking Customer Service Agent	Requires foundations and FlexCredits	Requires foundations and FlexCredits	✓	✓
Financial Services Self-Service Portals	Available for purchase	Available for purchase	Available for purchase	✓
AI-Enhanced Self-Service for Fins	Available for purchase	Available for purchase	Available for purchase	✓
Knowledge Base	✓	✓	✓	✓
Autonomous Scheduling	✓	✓	✓	Core Service Cloud
Workflow-Based Bots	Available for purchase	✓	✓	✓

Learn more about Agentforce Financial Services Pricing.
salesforce.com/ca/financial-services/pricing/



Modernize the Contact Center

The Unified Service Workspace

Eliminate the "swivel chair" effect and the Financial Services Franken-stack. Give your service teams a single, 360-degree view of the customer's entire financial life, so they never have to ask a client to repeat themselves.

Pre-built Financial Services Workflows

Accelerate resolution with over 30 out-of-the-box service processes specifically built for banking, wealth, and insurance. CSRs can execute multi-step requests, like fee reversals, address changes, or beneficiary updates, directly from the console.

AI-Powered CSR Productivity

Reduce Average Handle Time (AHT) and administrative burden. AI works to automatically transcribe calls, draft contextual emails, and perform manual tasks, driving prompt resolutions and hyper-personalized experiences so CSRs can focus entirely on the customer

Intelligent Omnichannel Routing

Ensure customers reach the right expert every time. Automatically route inquiries across voice, email, chat, and SMS based on real-time team member capacity, specialized skill sets, and specific regulatory licensing (e.g., Series 7 or P&C licenses).

Core Solution Features

Feature	Financial Services Cloud Enterprise	Financial Services Cloud Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Financial Services Data Models	✓	✓	✓	✓
Banking Employee Service Agent*	Available for purchase	Available for purchase	✓	✓
Insurance Service Agent	Available for purchase	Available for purchase	✓	✓
CSR Service Console	✓	✓	✓	✓
Action Launcher	✓	✓	✓	✓
OmniStudio	✓	✓	✓	✓
Record Alerts	✓	✓	✓	✓
Financial Accounts	✓	✓	✓	✓
Household & Relationship Groups	✓	✓	✓	✓

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Modernize the Contact Center

Core Solution Features

Feature	Financial Services Cloud Service Enterprise	Financial Services Cloud Service Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Life Events & Business Milestones	✓	✓	✓	✓
Identity Verification	✓	✓	✓	✓
Discovery Framework	✓	✓	✓	✓
Guided Intake	✓	✓	✓	✓
FlexCards (OmniStudio)	✓	✓	✓	✓
Interactive Timeline	✓	✓	✓	✓
Service Cloud Voice	Available for purchase	Available for purchase	Available for purchase	Core Service Cloud
Reply Recommendation	Available for purchase	Available for purchase	✓	Core Service Cloud
Unified Catalog	✓	✓	✓	Core Service Cloud
Unified Knowledge	✓	✓	✓	Core Service Cloud
Audit Trail	✓	✓	✓	Core Service Cloud
Live Agent Chat	Available for purchase	✓	✓	Core Service Cloud
Person Account	✓	✓	✓	Core Service Cloud
Social Customer Service	✓	✓	✓	Core Service Cloud
Omnichannel Routing	✓	✓	✓	Core Service Cloud

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Transparent and Connected Service Operations

End-to-End Process Orchestration

Automate multi-user, multi-stage financial processes from start to finish. Coordinate approvals seamlessly across the front, middle, and back offices to ensure frictionless, end-to-end service delivery without needing to write custom code.

Seamless Core Integration

Break down massive data silos by orchestrating real-time data flows between Salesforce and your core banking systems or policy administration ledgers. Ensure legacy data is instantly available for every automated service process without duplicating records.

Accelerated Dispute & Case Resolution

Automate complex service processes, like transaction disputes, wealth transfers, or insurance claims, from start to finish. Eliminate bottlenecks by seamlessly connecting your departments and instantly routing critical issues to the exact licensed specialist needed to dramatically reduce resolution times.

Built-In Compliance & Transparency

Turn regulatory requirements into loyalty-building experiences. Ensure every grievance, disclosure, and consent form is tracked, managed, and resolved according to strict financial services regulations with complete audit readiness.

Core Solution Features

Feature	Financial Services Cloud Enterprise	Financial Services Cloud Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
OmniStudio	✓	✓	✓	✓
OmniScripts (OmniStudio)	✓	✓	✓	✓
FlexCard (OmniStudio)	✓	✓	✓	✓
Integration Procedures (OmniStudio)	✓	✓	✓	✓
Data Mappers (OmniStudio)	✓	✓	✓	✓
Business Rules Engine	✓	✓	✓	✓
Data Processing Engine	✓	✓	✓	✓
Data Consumption Framework	✓	✓	✓	✓
Timeline & Engagements	✓	✓	✓	✓
Integrated Alerts	✓	✓	✓	✓
Action Plans	✓	✓	✓	✓



Transparent and Connected Service Operations

Core Solution Features

Feature	Financial Services Cloud Service Enterprise	Financial Services Cloud Service Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Service Process Library	✓	✓	✓	✓
Transaction Dispute Management	✓	✓	✓	✓
Complaint Management	✓	✓	✓	✓
Disclosure & Consent Management	✓	✓	✓	✓
Stage Management	✓	✓	✓	✓
Integration Orchestration	✓	✓	✓	✓
Flow Builder	✓	✓	✓	Core Service Cloud
Flow Orchestration	✓	✓	✓	Core Service Cloud
Case Management	✓	✓	✓	Core Service Cloud
Case Routing	✓	✓	✓	Core Service Cloud
Case Escalation & Queues	✓	✓	✓	Core Service Cloud
SLAs & Entitlements	✓	✓	✓	Core Service Cloud
Case Milestone Tracker	✓	✓	✓	Core Service Cloud
Unified Catalog	✓	✓	✓	Core Service Cloud
Document Management	✓	✓	✓	Core Service Cloud
AI Autofill	Available for Purchase	Available for Purchase	Available for Purchase	Core Service Cloud
Work Order Management	✓	✓	✓	Core Service Cloud



Performance and Growth in Service

Turn Service into Growth

Transform your contact center from a cost center into a growth driver. Empower service teams to seamlessly capture and route high-quality leads across departments, ensuring wealth, lending, and insurance cross-sell opportunities reach the right specialist instantly.

Deliver Proactive Service

Stop guessing why customers are calling. Automatically scan chat and voice transcripts at scale to uncover hidden frustrations and detect churn risks early, allowing managers to intervene proactively and preserve critical relationships

Monitor Live Queues and Prevent Delays

Give contact center leaders a clear view of exactly what is happening in the moment. Equip managers with live dashboards to monitor agent workloads, queue wait times, and active conversation sentiment so they can fix delays before they impact the customer

Balance Workloads & Prevent Burnout

Protect your team and guarantee service levels. Automatically track and balance workloads based on specific agent skills and real-time availability, ensuring high-priority cases are handled promptly without overwhelming your staff

Core Solution Features

Feature	Financial Services Cloud Enterprise	Financial Services Cloud Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Referral Management	✓	✓	✓	✓
Customer Signal Intelligence	Available for Purchase	Available for Purchase	✓	Core Service Cloud AI Feature
Conversation Mining	✓	✓	✓	Core Service Cloud AI Feature
Next Best Action	✓	✓	✓	Core Service Cloud AI Feature
Service Manager Dashboard	✓	✓	✓	Extend with Tableau
Command Center	✓	✓	✓	Core Service Cloud Feature
Real-Time Monitoring	✓	✓	✓	Core Service Cloud Feature
Workload Management	✓	✓	✓	Core Service Cloud Feature
Feedback Management	Available for Purchase	Available for Purchase	✓	Core Service Cloud Feature
Audit Trails	✓	✓	✓	Core Service Cloud Feature

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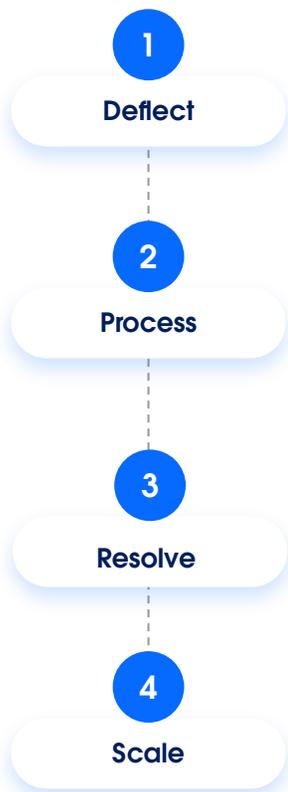
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Transform Dispute Anxiety into Trust and Loyalty

Here's how it works.

Transaction disputes are banking's fastest-growing service challenge. Agentforce Financial Services transforms how institutions handle them by unifying every step—from customer intake to chargeback resolution—in a single, AI-powered platform. We automatically enforce compliance and drive prompt, personalized resolutions to turn customer anxiety into lasting loyalty.



Deflect Disputes & Prevent Chargebacks

Intercept inquiries upstream. Instantly validate transactions by sharing rich transaction and merchant data to clarify confusing charges, and proactively alert merchants to refund "friendly fraud" before a formal chargeback is ever filed.

Process Issues Quickly in the Contact Center

Capture all required information accurately the first time. Use dynamic, multi-step logic that adapts to customer responses in real-time, eliminating incomplete or non-compliant dispute intakes and reducing costly rework.

Streamline Resolution with Network Automation

Resolve network claims in minutes, not weeks. Eliminate manual "swivel-chair" processes by integrating natively with Visa (VROL) and Mastercard (Mastercom). Statuses sync automatically via polling, ensuring faster resolution with zero data errors.

Scale Operations with AI Agents

Manage exploding transaction volumes without increasing headcount. Deploy Agentforce AI to act as an elastic workforce that handles 24/7 intake, answers routine inquiries autonomously, and preps complex cases for human review.

See what's included in this solution:

Transaction Enrichment:
Real-time API integration that maps confusing merchant descriptors to clear logos and digital receipts, reducing call volume.

Agentforce for Disputes:
An AI teammate pre-trained on dispute processes that suggests next steps, drafts compliant responses, and summarizes cases for faster resolutions.

Native Network Integrations:
First out-of-the-box Visa and Mastercard connectivity embedded within the CRM to automate merchant communication, chargeback workflows, and credit issuance.

Polling & Orchestration:
Automatically sync network decisions in real-time. The system pulls the latest dispute updates directly into Salesforce, updates the case and lines up the next task automatically.

How can automated and AI-powered disputes help your bank?



Reduction in customer-impacting errors

[McKinsey Data via Rezo.ai \(Jan 2026\)](#)



Straight-through digital processing rates

[KPMG Data via The Financial Brand \(2026\)](#)



Reduction in overall fraud losses for

[KPMG Data via The Financial Brand \(2026\)](#)

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Deflect & Intake

Intelligent Self-Service & Streamlined Intake

Intercept routine inquiries and stop "friendly fraud" upstream via digital channels. When human assistance is needed, capture dispute data on the first try with guided, automated workflows.

Intelligent Dispute Resolution (Self-Service)

Empower customers to securely view transactions, initiate disputes, and track claim statuses 24/7 on their own schedule without calling the contact center.

Transaction Enrichment

Translate cryptic merchant codes into clear names and digital receipts, eliminating "I don't recognize this charge" inquiries instantly.

Visa & Mastercard Integrations

Connect directly to Visa and Mastercard from the intake screen to validate transaction eligibility and map required evidence instantly.

Banking Customer Service Agent

Deploy an AI agent to instantly answer "What is this charge?" questions and autonomously categorize incoming requests before they reach a human.

Identity Verification (IDV)

Block bad actors at the point of engagement with guided authentication flows that generate a timestamped, audit-ready log for compliance.

Discovery Framework

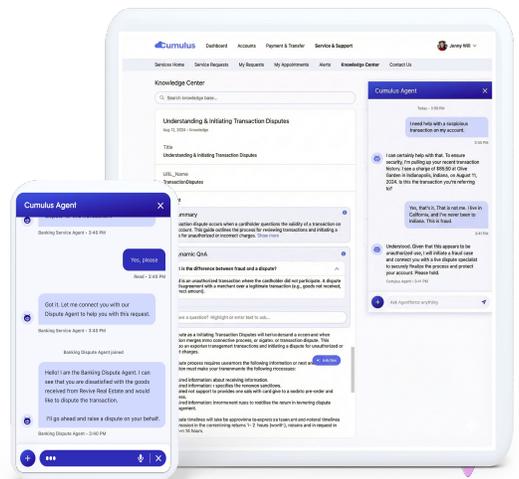
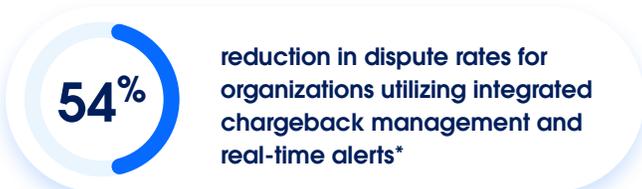
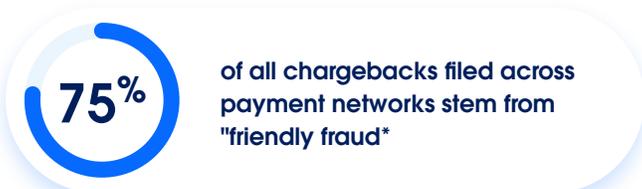
Capture perfect data with dynamic, multi-page intake forms that adapt in real-time based on the specific dispute reason code selected.

ACH Dispute Intake

Navigate ACH complexities with guided workflows built around NACHA rules, automatically generating the required Written Statement of Unauthorized Debit (WSUD).

Action Launcher

Standardize service delivery by surfacing the most relevant dispute actions and intake flows for agents with a single click.



Contact us to learn more about the Agentforce Financial Services.
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*Chargeblast: Chargeback Prevention 2026 (Jan 2026); PYMNTS Data via Chargeblast (Jan 2026); Ethoca and Aite Group Research (2024)



Processing & Investigation

Automate & Orchestrate Complex Investigations

Eliminate "swivel-chair" manual work and enforce regulatory compliance with automated workflows, AI-assisted investigation, and real-time payment network connectivity.

OOTB Pre-Built Dispute Workflow

Accelerate time-to-value with a standardized transaction dispute workflow available directly in the Unified Catalog. This out-of-the-box template eliminates heavy custom development and ensures consistent execution.

Case Management

Unify all dispute data, customer communications, and network evidence into a single, auditable case record. This creates a centralized source of truth for both front-line agents and back-office investigators.

SLAs and Milestones

Automatically track strict regulatory clocks (like Regulation E or Z) from the moment the dispute is initiated. Prevent liability shifts by alerting supervisors instantly via visual flags or Slack..

Integration Orchestration

Automate complex cross-system tasks by syncing data across Salesforce and legacy core banking systems in the background. This ensures seamless data flow and integrity without requiring manual agent coordination.

Visa Integration (VROL)

Native connectivity to Visa Resolve Online allows agents to package and submit evidence directly to Visa without leaving Salesforce. It automates representations and manages the complex back-and-forth of liability shifts seamlessly.

Mastercard Integration (Mastercom)

API-based integration with Mastercom allows back-office teams to adjudicate claims and push decisions directly to the network. It eliminates manual portal hopping and ensures every merchant inquiry is tracked natively within the CRM.

Merchant Alerts

Utilize real-time Mastercard network alerts to intercept charges and push pre-dispute signals directly to merchants. This triggers proactive refunds, preventing the financial loss and operational cost of a formal chargeback.

Banking Employee Service Agent

Empower specialists with an Agentforce AI assistant that instantly summarizes complex case histories, evidence, and interaction logs. It reduces cognitive load by recommending the next best steps.

Case Routing

Eliminate manual triage by automatically assigning complex or high-value dispute cases to the most qualified, available back-office analyst.

Automated Polling

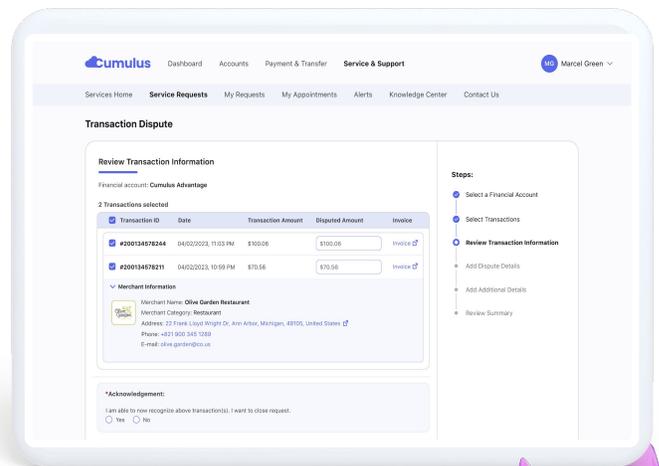
Keep every record accurate without manual portal checks. The system automatically pulls real-time status updates from Visa and Mastercard directly into the Salesforce case and triggers the next required task.

Business Rules Engine (BRE)

Remove guesswork by digitizing complex logic—such as instant write-off thresholds for low-value claims. This ensures consistent, compliant decisions without requiring manual review.

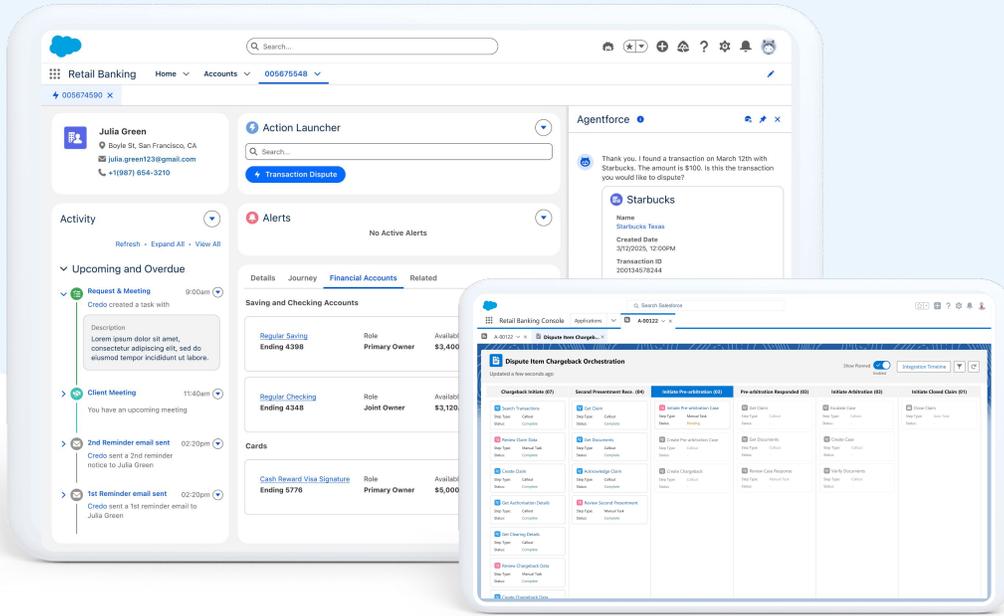
Stage Management

Provide a clear, visual chevron indicator of exactly where a dispute sits in its lifecycle. This gives operations teams instant visibility into progress to help identify and clear bottlenecks quickly.



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Resolve & Improve

Resolve Quickly & Always Improve to Build Lasting Loyalty

Deliver the fast, transparent resolutions customers expect to turn moments of anxiety into lasting trust. By empowering managers with real-time data and insights, you can continuously optimize dispute operations, track SLA compliance, and build deep, lasting customer loyalty.

Resolution with Visa (RDR)

Leverage native Visa integration to settle qualified low-value disputes instantly through automated Rapid Dispute Resolution (RDR) rules. This bypasses manual review entirely to accelerate final outcomes and reduce analyst workload.

Document Management

Safely store all customer-provided evidence, merchant receipts, and network responses directly tied to the unified case record. This ensures all required documentation is perfectly organized and instantly accessible for regulatory audits.

GenAI Dispute Email Generation

Use Agentforce to automatically draft personalized, empathetic emails explaining the final dispute outcome to the customer. Agents can generate, review, and send tailored resolution letters in a single, fluid motion.

Audit Trails

Automatically generate and maintain solid, immutable records of all process steps and document interactions. This ensures every dispute is fully traceable and audit-ready for easy regulatory reporting.

Resolution with Mastercard

Capture the final win/loss decision directly from Mastercom and push representations or chargeback reversals to the network. This allows agents to finalize cases and update statuses natively within the CRM without portal hopping.

Dispute Letter Templates

Standardize communication with a library of pre-approved templates for every dispute scenario, from initial acknowledgment to final closure that can be sent via email or traditional mail. Enforcing consistency and compliance.

Tableau Dashboards for Service (add-on)

Empower managers with real-time visual insights into SLA adherence, dispute volumes, and agent efficiency metrics. This transforms raw operational data into actionable strategies to identify bottlenecks and continuously improve overall customer satisfaction.

Process Compliance Navigator (add-on)

Enforce rigid workflow governance with an add-on that actively monitors processes against regulatory guidelines. It embeds compliance controls directly into the workflow to ensure no required step is ever skipped by human or agentic teams.



Transaction Dispute Management

Deflect Disputes & Prevent Chargebacks

Intercept routine inquiries upstream via digital channels. Stop "friendly fraud" instantly by sharing clear merchant data and digital receipts, resolving customer confusion before a formal chargeback case is ever created.

Streamline Dispute Intake

Capture complete, audit-ready data on the first try. Guided, multi-page frameworks adapt to customer responses in real-time, mapping exact evidence requirements and verifying identity to drastically reduce network rejections.

Automate Complex Investigations

Eliminate manual "swivel-chair" work and enforce strict regulatory compliance. Background workflows seamlessly orchestrate data across legacy core banking systems while AI co-pilots and automated network polling keep cases moving instantly.

Accelerate Resolution

Settle claims faster and optimize operations. Native integrations to Visa and Mastercard push decisions in real-time, while generative AI instantly drafts personalized, empathetic resolution letters to turn a moment of anxiety into lasting loyalty.

Core Solution Features

Feature	Financial Services Cloud Enterprise	Financial Services Cloud Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Intelligent Dispute Resolution (Self-Service Portals)	Available with Experience Cloud Add-on	Available with Experience Cloud Add-on	Available with Experience Cloud Add-on	✓
Banking Customer Service Agent	Available for Purchase (Agentforce)	Available for Purchase (Agentforce)	✓	✓
Transaction Enrichment	✓	✓	✓	✓
Identity Verification	✓	✓	✓	✓
Discovery Framework	✓	✓	✓	✓
Visa and Mastercard Integrations	✓	✓	✓	✓
ACH Dispute Intake	✓	✓	✓	✓
Action Launcher	✓	✓	✓	✓
Timeline & Engagements	✓	✓	✓	✓
OOTB Pre-built Dispute Workflow	✓	✓	✓	✓
Case Management	✓	✓	✓	Core Service Functionality



Transaction Dispute Management

Core Solution Features

Feature	Financial Services Cloud Service Enterprise	Financial Services Cloud Service Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Case Routing	✓	✓	✓	Core Service Functionality
SLAs & Milestones	✓	✓	✓	Core Service Functionality
Business Rules Engine	✓	✓	✓	✓
Stage Management	✓	✓	✓	✓
Visa Integration (VROL)	✓	✓	✓	✓
Mastercard Integration (Mastercom)	✓	✓	✓	✓
Merchant Alerts	✓	✓	✓	✓
Banking Employee Service Agent	Available for purchase	Available for purchase	✓	✓
Automated Polling	✓	✓	✓	✓
Integration Orchestration	✓	✓	✓	✓
Resolution with Visa (RDR)	✓	✓	✓	✓
Resolution with Mastercard	✓	✓	✓	✓
Document Management	✓	✓	✓	✓
Dispute Letter Templates	Marketing Cloud to Unlock	Marketing Cloud to Unlock	Marketing Cloud to Unlock	✓
GenAI Dispute Email Generation	Available for purchase	Available for purchase	✓	✓



Transaction Dispute Management

Core Solution Features

Feature	Financial Services Cloud Service Enterprise	Financial Services Cloud Service Unlimited	Agentforce 1 for Financial Services - Service	Financial Services Specific Feature
Audit Trails				
Process Compliance Navigator	Available for purchase	Available for purchase	Available for purchase	
Tableau Dashboard for Service	Available for purchase	Available for purchase		