



Financial Services Cloud Summer '25 Release

PMM Overview

Release Scope

Summer '25 Release



Agentforce

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**Agentforce
for Financial
Services Cloud
is here!!**



Agentforce for Financial Services



Deliver efficiency with intelligent actions and real-time data

Scale personalised Financial Services experiences with a digital workforce

Maintain compliance with built-in guardrails on a trusted, secure platform



*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.

Agentforce For Financial Services: Financial Advisor Assistance

Enabling financial advisors to shift their focus from administrative tasks to business growth



Financial Services Cloud for Wealth Management

Stay ahead of client needs with automated meeting preparation and real-time insights for wealth advisors



Improve advisor efficiency and productivity by automating meeting preparation and streamlining workflows



Strengthen client relationships by offering personalised experiences and anywhere anytime support



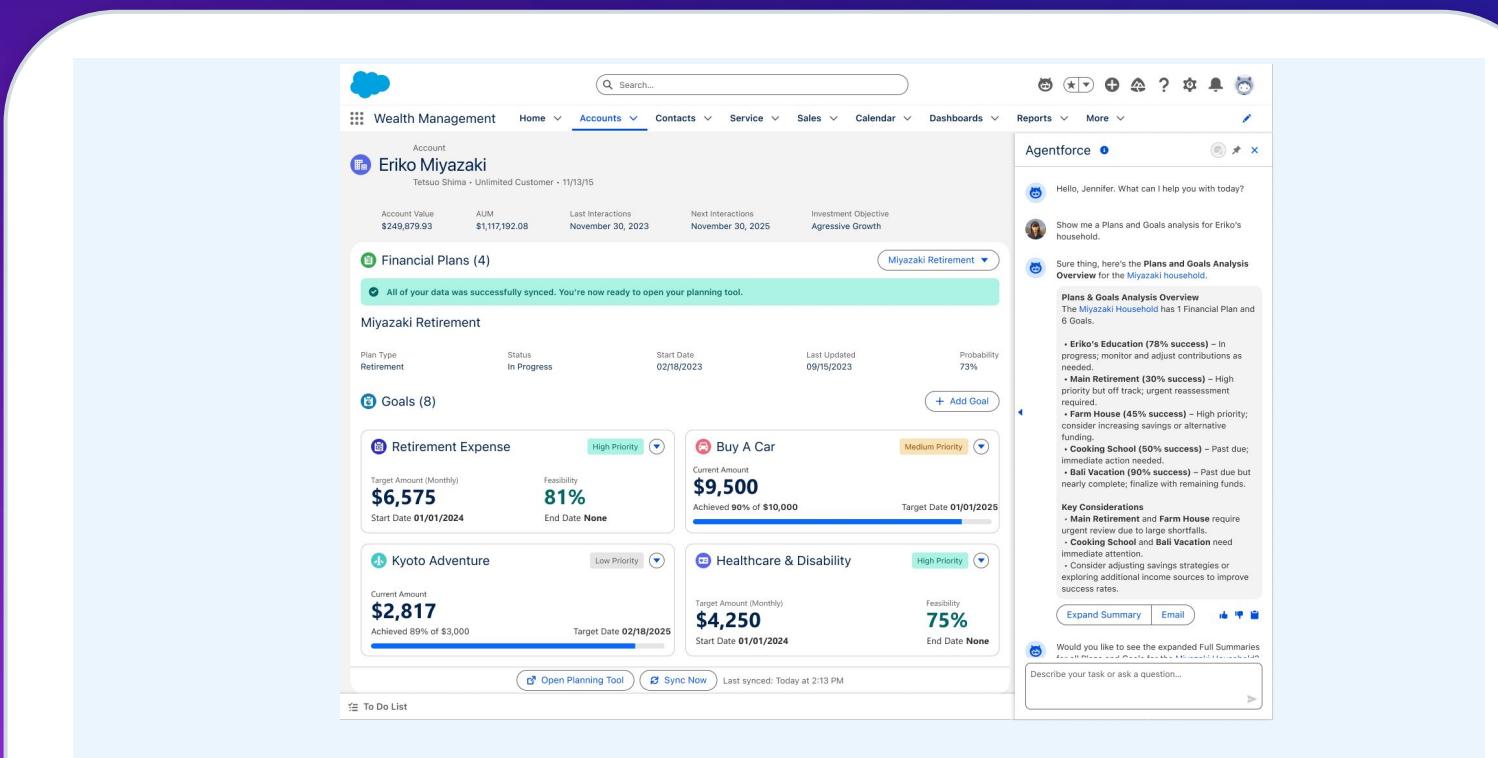
Grow book of business by acting on real-time insights and proactive recommendations

The screenshot displays the Financial Services Cloud interface for a client named Eriko Miyazaki. The top section shows account details: Account Value (\$249,879.93), AUM (\$1,117,192.08), Last Interactions (November 30, 2023), Next Interactions (November 30, 2025), and Investment Objective (Aggressive Growth). Below this, the 'Financial Plans (4)' section indicates that all data was successfully synced, ready for planning. The 'Miyazaki Retirement' plan is detailed with a Plan Type of Retirement, Status In Progress, Start Date of 02/18/2023, Last Updated on 09/15/2023, and a Probability of 73%. The 'Goals (8)' section lists four goals: 'Retirement Expense' (High Priority, \$6,575 target, 81% feasibility, start 01/01/2024), 'Buy A Car' (Medium Priority, \$9,500 current, 90% achieved of \$10,000, target 01/01/2025), 'Kyoto Adventure' (Low Priority, \$2,817 current, 89% achieved of \$3,000, target 02/18/2025), and 'Healthcare & Disability' (High Priority, \$4,250 target, 75% feasibility, start 01/01/2024). The right side of the interface shows a sidebar for 'Agentforce' with a chat history and a 'Plans & Goals Analysis' section for the Miyazaki Household. A large blue button at the bottom right encourages users to 'Get started'.

Easy access to client information and portfolio summary

Wealth Management Release

What's new Launching June '25

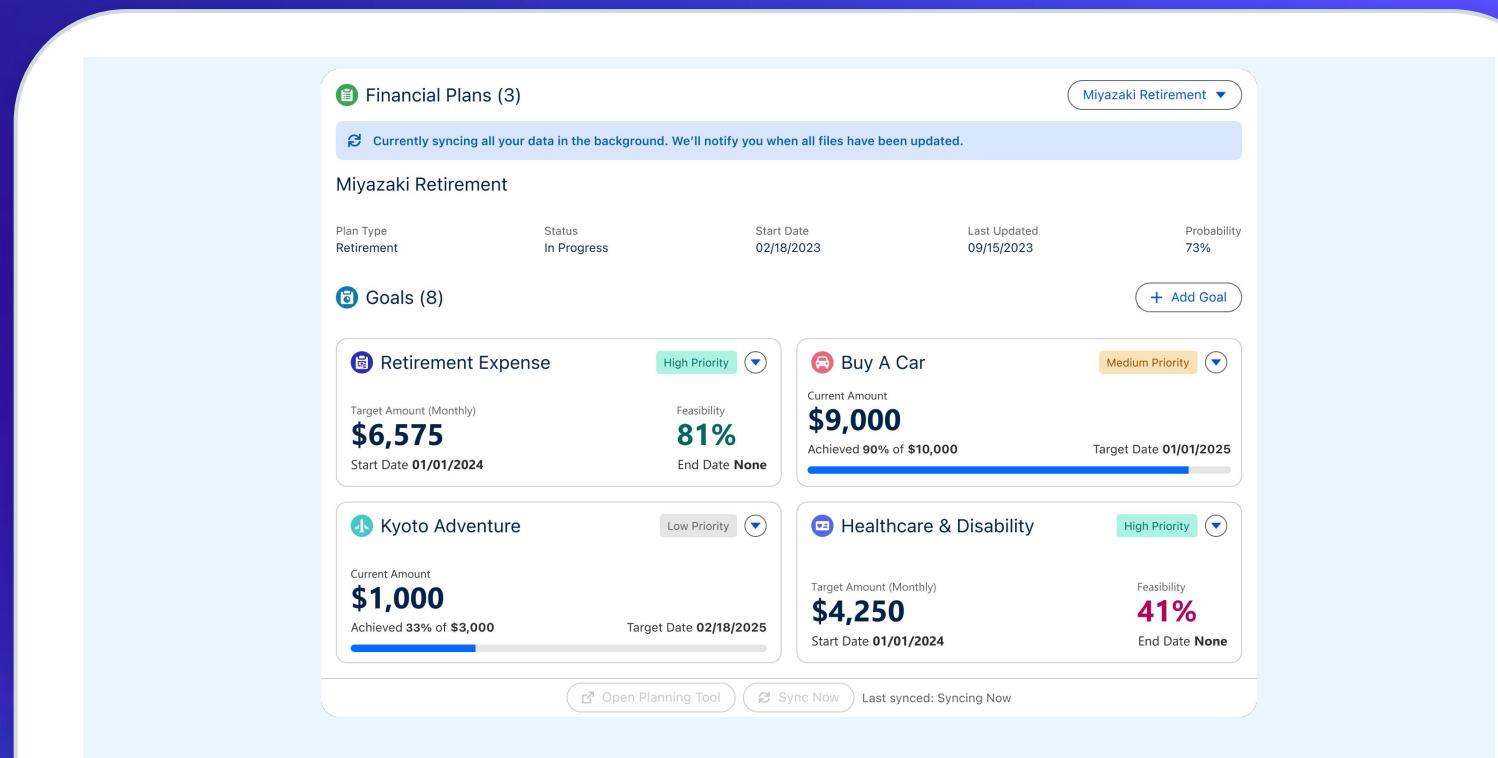


The screenshot shows a wealth management dashboard for a client named Eriko Miyazaki. The top navigation bar includes 'Wealth Management', 'Home', 'Accounts', 'Contacts', 'Service', 'Sales', 'Calendar', 'Dashboards', 'Reports', and 'More'. The 'Accounts' tab is selected. The main content area displays a 'Financial Plans (4)' section for 'Miyazaki Retirement', showing four goals: Retirement Expense (\$6,575, High Priority), Buy A Car (\$9,500, Medium Priority), Kyoto Adventure (\$2,817, Low Priority), and Healthcare & Disability (\$4,250, High Priority). A sidebar on the right shows a conversation with an Agentforce AI agent named Jennifer, discussing the client's financial situation and providing analysis.

Agentforce Financial Advisor Assistance

Automate meeting preparation by generating client information and portfolio summaries, review allocations, life events, financial plans and goals, draft meeting agenda and create action plan.

Helping advisors to get rid of administrative tasks and focus on client relationships.



The screenshot shows a 'Financial Plans (3)' section for 'Miyazaki Retirement'. It displays three goals: Retirement Expense (\$6,575, High Priority), Buy A Car (\$9,000, Medium Priority), and Kyoto Adventure (\$1,000, Low Priority). The 'Goals (8)' section shows eight additional goals with their respective target amounts, feasibility, and priority levels. A status bar at the top indicates 'Currently syncing all your data in the background. We'll notify you when all files have been updated.'

Financial Planning with Real-time Rollups

Help advisors sync the latest financial information, such as assets and accounts, ensuring accurate financial health data.

Admins configure real-time record rollup definitions, and advisors can click 'Sync Now' to update client information.

Wealth Management Innovation

Financial Advisor Assistance

salesforce

AI Agents with Wealth Expertise

Automate mundane tasks like gathering client information and portfolio performance help financial advisor to prepare quickly

Reduce preparation time

Assist advisor by presenting client and portfolio summary, current and target allocations, and updating on plans and goals

Pre-Built and Easy to Deploy

Provides out-of-the-box wealth-specific context with ready-to-use templates and actions

The screenshot displays the Salesforce Financial Services Cloud interface. At the top, the navigation bar includes 'Wealth Management', 'Home', 'Accounts' (selected), 'Contacts', 'Service', 'Sales', 'Calendar', 'Dashboards', 'Reports', and 'More'. Below the navigation is a search bar and a toolbar with icons for 'Follow', 'New', 'Edit', 'Delete', and 'Clone'. The main content area shows an account record for 'Eriko Miyazaki' with details like Account Value (\$249,879.93), AUM (\$1,117,192.08), Last Interactions (November 30, 2023), Next Interactions (November 30, 2024), and Investment Objective (Agressive Growth). A section titled 'Contextual Alerts (5)' lists three items: a large direct deposit from employer, consistent monthly savings, and spending vs. earnings. Below this is a 'Fact Finding' section with a 'New Survey' form for 'Financial Risk As...' (Type: Financial Risk As...). To the right, a sidebar lists 'Files (7)', 'Contacts (3)', 'Opportunities (14)', and 'Cases (3)'. A blue cloud-shaped character is visible at the bottom.

Financial Advisor Assistance In Action



Action: Wealth Client Summary & Portfolio Performance Summary



Client Profile Summary

Presents key client information including financial accounts, financial goals, cases, household and associated accounts.

Summarize unstructured data like call and activity notes

Portfolio Performance Summary

Provides comprehensive overview of a client's portfolio performance, including top-performing and underperforming holdings

The screenshot shows the Salesforce Wealth Management interface. At the top, the navigation bar includes 'Wealth Management', 'Home', 'Accounts' (selected), 'Contacts', 'Service', 'Sales', 'Calendar', 'Dashboards', 'Reports', and 'More'. The main content area is titled 'Account' and shows details for 'Eriko Miyazaki'. Key metrics include 'Account Value: \$249,879.93', 'AUM: \$1,117,192.08', 'Last Interactions: November 30, 2023', 'Next Interactions: November 30, 2025', and 'Investment Objective: Aggressive Growth'. Below this, there are sections for 'Financial Plans (4)', 'Miyazaki Retirement' (Plan Type: Retirement, Status: In Progress, Start Date: 02/18/2023, Last Updated: 09/15/2023), 'Goals (8)', 'Retirement Expense' (Target Amount: \$6,575, Feasibility: 81%, Start Date: 01/01/2024), 'Buy A Car' (Current Amount: \$9,500, Achieved: 90% of \$10,000), 'Kyoto Adventure' (Current Amount: \$2,817, Achieved: 89% of \$3,000), 'Healthcare & Disability' (Target Amount: \$4,250, Start Date: 01/01/2024), and 'Upstyle, Inc.' (multiple sections for different business units). A sidebar on the right is titled 'Agentforce' and shows a message: 'Show me the breakdown of Morris Roasters, LLC financials?'. The message details the company's financials and opportunities. A large purple button at the bottom right says 'Generate Client & Portfolio Summary'.



Generate Client & Portfolio Summary

Action: Review Allocations, Life Events, and Plans & Goals Progress



Agentforce

Hello, Jennifer. What can I help you with today?

Show me a Plans and Goals analysis for Eriko's household.

Sure thing, here's the [Plans and Goals Analysis Overview](#) for the [Miyazaki household](#).

Plans & Goals Analysis Overview

The [Miyazaki Household](#) has 1 Financial Plan and 6 Goals.

- **Eriko's Education (78% success)** – In progress; monitor and adjust contributions as needed.
- **Main Retirement (30% success)** – High priority but off track; urgent reassessment required.
- **Farm House (45% success)** – High priority; consider increasing savings or alternative funding.
- **Cooking School (50% success)** – Past due; immediate action needed.
- **Bali Vacation (90% success)** – Past due but nearly complete; finalize with remaining funds.

Key Considerations

- **Main Retirement and Farm House** require urgent review due to large shortfalls.
- **Cooking School** and **Bali Vacation** need immediate attention.
- Consider adjusting savings strategies or exploring additional income sources to improve success rates.

Describe your task or ask a question...

High Priority

Buy A Car

Current Amount
\$9,500

Achieved 90% of \$10,000

Feasibility
81%

End Date None

Low Priority

Healthcare & Disability

Target Amount (Monthly)
\$4,250

Start Date 01/01/2024

End Date None

Target Date 02/18/2025

Plans and Goals Analysis

Review Current and Target Asset Allocation

Compare current allocation with target, flagging deviations. Suggest rebalancing actions based on current vs. target allocation and risk tolerance.

Review Upcoming Life Events

Identify recent and upcoming life events such as marriages, births, retirements and home purchases and provides advisors with timely insights

Review Financial Planning & Goals Progress

Track progress toward financial goals like retirement, education funding, etc. and helps wealth advisors efficiently prepare for client meetings



Action: Draft Meeting Agenda & Create Action Plan Tasks



Draft Meeting Agenda

Generate personalized agenda based on key client insights including client summary, portfolio review and financial goals and draft an email

Create Action Plan Tasks

Review and alerts all pending tasks that should be completed before the meeting and improves advisor's meeting preparation efficiency

The screenshot shows the Salesforce Agentforce interface. At the top, the navigation bar includes 'Wealth Management', 'Home', 'Accounts' (which is selected), 'Contacts', 'Service', 'Sales', 'Calendar', 'Dashboards', 'Reports', and 'More'. The main content area is for the account 'Eriko Miyazaki'. It displays account details: Account Value (\$249,879.93), AUM (\$1,117,192.08), Last Interactions (November 30, 2023), Next Interactions (November 30, 2025), and Investment Objective (Aggressive Growth). Below this, there are sections for 'Financial Plans (4)' and 'Goals (8)'. The 'Financial Plans' section shows 'Miyazaki Retirement' with a plan type of 'Retirement', status 'In Progress', start date '02/18/2023', and last updated '09/15/2023'. The 'Goals' section lists four items: 'Retirement Expense' (High Priority, \$6,575 target, 81% feasibility, start 01/01/2024), 'Buy A Car' (\$9,500 current, 90% achieved of \$10,000), 'Kyoto Adventure' (Low Priority, \$2,817 current, 89% achieved of \$3,000), and 'Healthcare & Disability' (\$4,250 target, start 01/01/2024). To the right, a sidebar for 'Miyazaki Household' shows details: Name (Eriko Miyazaki), Created Date (7/17/2025, 8:47AM), Email [DRAFT] for review (Miyazaki Plans & Goals Analysis), Close Date (8/16/2024), and Amount (USD \$7,680). Below the sidebar is a text input field: 'Describe your task or ask a question...'.

Draft Email and Create Tasks



Wealth Management Enhancements

Bulk Renewals

GA | June 2025

Get a complete view of the Household with connected financial plans and goals



Financial Plans (3)

Currently syncing all your data in the background. We'll notify you when all files have been updated.

Miyazaki Retirement

Plan Type	Status	Start Date	Last Updated	Probability
Retirement	In Progress	02/18/2023	09/15/2023	73%

Goals (8)

+ Add Goal

Retirement Expense Target Amount (Monthly) \$6,575 Start Date 01/01/2024	Buy A Car Current Amount \$9,000 Achieved 90% of \$10,000 Target Date 01/01/2025
Kyoto Adventure Current Amount \$1,000 Achieved 33% of \$3,000 Target Date 02/18/2025	Healthcare & Disability Target Amount (Monthly) \$4,250 Start Date 01/01/2024

Real time record rollup

Easy access with "Sync Now"

Open Planning Tool **Sync Now** Last synced: Syncing Now

Most up-to-date financial data

Third-party Integration

Enhanced Financial Planning Integration

Agentforce For Financial Services: Banking Relationship Assistance

Empowering deeper client relationships and Accelerated revenue growth



Financial Services Cloud for Commercial Banking

From client onboarding and KYB to business relationship planning - simplify B2B Banking and accelerate growth with pre-built solutions, tailored to commercial banking



Build more effective sales strategies to boost revenue faster with unified client data and AI



Empower relationship managers to become trusted advisors with actionable insights and reliable AI tools



Simplify Complex Process Like KYB and onboarding with automation and best in class partner integrations

Objectives

- Facilitate Fleet Expansion: In Progress - Category: Equipment Finance - Owner: Sarah Parker
 - Total Measure: 5 (1 Overdue)
 - Measure Completed: 4 / 5
 - Tasks Completed: 4 / 5
- Strengthen relationship with new CFO: In Progress - Category: Executive Management - Owner: Mei Lee
 - Total Measure: 4
 - Measure Completed: 2 / 5
 - Tasks Completed: 2 / 10
- Cash Management Evaluation: Completed - Category: Increase Wallet Share - Owner: Mark Jones
 - Total Measure: 2
 - Measure Completed: 2 / 2
 - Tasks Completed: 2 / 2

Changes Overview

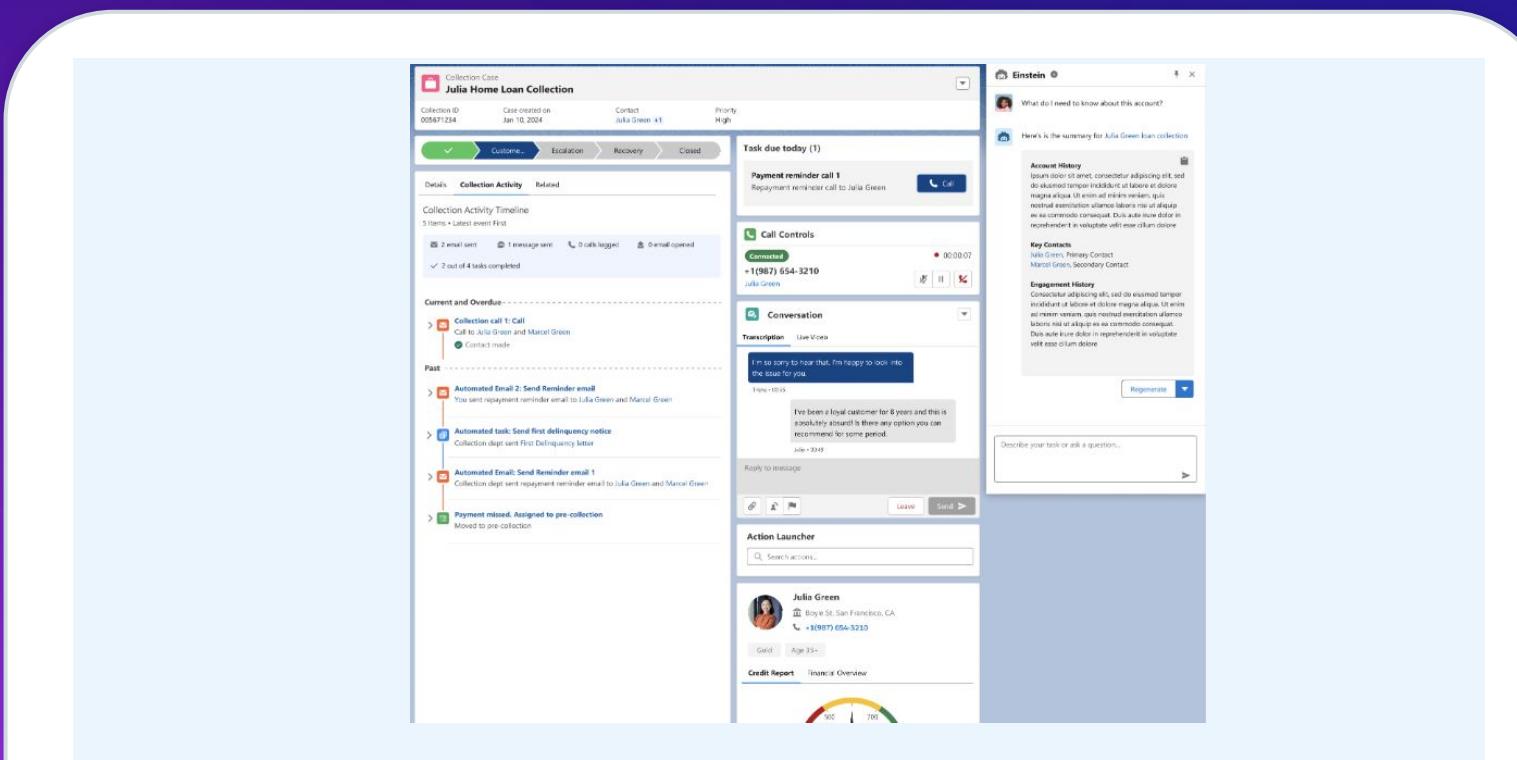
Account Plan

WBT Business Relationship Plan
2 Items updated
Status: New to In Progress
Date: None to 10/10/2024

Preconfigured Solutions for Commercial Banking

Commercial Banking Release

What's new Launching June '25



Agentforce Banking Relationship Assistance

Summarize meeting insights, define follow-up tasks, and update CRM records instantly.

Boost productivity by automating post-meeting actions, reducing admin time, and helping RMs focus on building stronger client relationships.



Commercial Banking Innovation

Banking Relationship Assistance

Built In Banking Relationship Expertise

Empower relationship managers to forge deeper client relationships by automating routine tasks so they can focus on driving revenue growth

Effortless Meeting Prep

Instantly generate tailored meeting briefs and arm relationship managers with insights that drive sales and performance

Pre-Built and Easy to Deploy

Structure meeting notes, update account plans, and summarize client conversations automatically, reducing admin work and keeping your CRM always up to date.

The image displays the Cumulus mobile application and the Salesforce Financial Services Cloud interface side-by-side. The mobile app on the left shows a client profile for 'Rachel Morris' and account details for a 'Saver Account' with an available balance of '\$3,400.00'. The Salesforce interface on the right shows a client profile for 'Rachel Morris' with alerts for a mortgage account on hold, a possible fraudulent transaction, and a regular checking account in overdraft. It also displays account summaries for 'Regular Checking' and 'Super Saver' accounts, and an Einstein AI sidebar providing a 'Next Best Action' for converting the client to VIP status.

Cumulus Mobile App (Left):

- Client Profile: Rachel Morris, Mission St Branch, Austin, TX
- Accounts (1): Saver Account (Account Number: 2000137849900, Available Balance: \$3,400.00)
- Goals (1): Baying a Car (Target Cost: \$3000, Target Date: Oct, 2025, Progress: 25%)

Salesforce Financial Services Cloud (Right):

- Client Profile:** Rachel Morris
- Alerts (4):**
 - Mortgage Account (Ending 3245) is on hold
 - Possible fraudulent transaction on Cash Rewards Visa Signature Account Ending - 4568
 - Regular Checking Account (ending 5432) is in overdraft
- Accounts (Summary):**

Account Type	Role	Available Balance
Regular Checking	Primary Owner	USD 1,120.00
Super Saver	Primary Owner	USD 8,720.00
- Einstein AI Sidebar:**
 - Next Best Action: High likelihood of converting this client to VIP. Offer them a checklist for home buyers navigating uncertain times.
 - What's going on with Rachel: Rachel has been a member since 2017. Her assets under management total \$123,842 and are contained across three products: one checking account, one savings account and one investment account. Her liabilities total \$5,128 which entirely comes from one product: a credit card account. None of her accounts have Joint Owners and she does not have anyone else in her Household in our system. Her sentiment is positive with a CSAT of 8.1.
 - Attention: Alert: Rachel's credit card ending in 8840 has a balance of \$5,128, \$128 above her limit. Case: A case was created today at 03:19 PM regarding a potential Transaction Dispute.
 - Journey and Engagement Information: (partial view)

Banking Relationship Assistance Agent In Action



Interaction



Client Meeting Completed



Creating Client Meeting Summary

Topics

Agent picks the right topic and follows the instructions

Post Meeting Assistant

Actions

- 1 Structure Meeting Notes
- 2 Create Interaction, Interaction Summary, & Attendee
- 3 Create Account Plan Objective
- 4 Create Account Plan Objective Measure
- 5 Create Opportunity
- 6 Get Interactions by Date
- 7 Plus More!

Agent enriches actions



CRM



Data Cloud



External



User Input

Outcome



Automated post-meeting summary generated

Automatic record creation and updates

Strategic next best steps generated for Relationship Manager

Einstein Trust Layer

Action: Restructure Meeting Notes

Provides relationship managers with structured and contextual communication guidance



Automated Post Meeting Notes

Logs notes from a completed client meeting directly into the account record. Automatically associates the notes with the relevant account plan and updates the relationship history for full team visibility.

Structured Meeting Notes

Uses AI to reformat raw meeting notes into a clean, structured summary. Highlights key discussion points, decisions made, and follow-up actions, making it easier for teams to stay aligned.

Details

Configuration This Topic's Actions

Actions assigned to your topic. To add or remove, your agent must be deactivated.

Sort by Agent Action Label(asc)

On Label ↑

Upload for RM Meeting Notes

Unlocked Flow to get Content Document IDs f

Interaction Summary

Opportunity

Record

Record by Name

Account Plan Objective Measure

To Do

Revise Email

Interactions By Date Range

Interaction

Structure Meeting Notes

Account Plan Objective

Interaction Attendee

Records

Select Action

Create Interaction (CreateInteraction)

Creates interaction records for meetings and conversations with clients or partners. Requires an Account ID or Interaction ID to proceed.

Input

```
{ "accountId": "001Ws00003naGX2IAM", "startDateTime": "2025-05-14T21:18:09.686748780Z", "name": "Expansion Plans Discussion", "duration": "00:00:00" }
```

Output

```
{ "newInteraction": { "sObjectInfo": { "apiName": "Interaction", "label": "Interaction" } } }
```

Select Action

Create a To Do (CreateAToDo)

Create a task record based on user input. You must call this createAToDo when user explicitly asks for 'Set a reminder', 'Add a reminder', 'Create a task', 'Create a to do'

Input

```
{ "subject": "Add Richard Bennett as a contact", "description": "Add Richard Bennett, the new Director of Operations, as a key contact on the project." }
```

Output

```
{ "taskId": "00Tw0000080DCPMA4", "resultMessage": "Sure, I created a task record:<br><strong>Subject</strong>: <a href=\"/00Tw0000080DCPMA4\\\">Add Richard Bennett as a contact</a>." }
```

Select Action

Create a To Do (CreateAToDo)

Create a task record based on user input. You must call this createAToDo when user explicitly asks for 'Set a reminder', 'Add a reminder', 'Create a task', 'Create a to do'

Conversation Preview

I've created the interaction. Here are the details:

Account ID: Morris Roas

Start Time: 5/14/2025, 11:18:09 AM

End Time: 5/14/2025, 11:18:09 AM

Description: Met with Ju to discuss expansion plans.

Account Plan: Expansion

Sure, I created the task.

Subject: Add Richard Bennett as a contact

Task Subtype: Create

Priority: High

Status: Not Started

Description: Add Richard Bennett, the new Director of Operations, as a key contact on the project.

Sure, I created the task.

Subject: Add Richard Bennett as a contact

Task Subtype: Create

Priority: High

Status: Not Started

Description: Add Richard Bennett, the new Director of Operations, as a key contact on the project.

Describe your task.

Actionable Meeting Notes & Summaries



Action: Create Account Plan Objective & Account Plan Objective Measure

salesforce

The screenshot shows the Salesforce interface for managing account interactions. The top navigation bar includes 'Commercial Banking', 'Home', and the current account 'Acme | Account'. The main content area displays the 'Action Launcher' and 'Banking Relationship Assist...' panels. The 'Action Launcher' panel shows a search bar and a list of interactions. The 'Banking Relationship Assist...' panel displays restructured meeting notes and a summary of client needs, requests, challenges, and concerns. The 'Interactions' section lists four interactions, including meetings with Acme and a review of the account plan. The 'Interaction Summaries' section shows six summaries. A purple banner at the bottom of the interface reads 'Measurable Performance'.

Account Plan Objective

Initiates a new strategic goal within an existing account plan. Relationship managers can define key objectives aligned to client needs, such as expanding wallet share or deepening product adoption.

Account Plan Objective Measure

Adds measurable KPIs to a specific account plan objective. Enables tracking of progress against goals using quantifiable metrics like revenue growth, product uptake, or engagement levels.

Action: Create Interaction, Interaction Summary, and Interaction Attendee



Capture Every Interaction With Clarity

Log meetings in real time, create a to-do, summarize key takeaways with AI, and tag participants, automatically ensuring complete and accurate records without the manual effort.



Force Builder Relationship Manager Assistant Version 1 (Active) ▾

Details

Configuration This Topic's Actions

Actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Sort by Agent Action Label(asc)

Agent Label ↑

Upload for RM Meeting Notes

Unlinked Flow to get Content Document IDs

Interaction Summary

Opportunity

Lead Record

Key Record by Name

Account Plan Objective Measure

To Do

Or Revise Email

Interactions By Date Range

Interaction

Structure Meeting Notes

Account Plan Objective

Interaction Attendee

Records

Select Action

Create Interaction (CreateInteraction)

Creates interaction records for meetings and conversations with clients or partners. Requires an Account ID or Interaction ID to proceed.

Input

```
{ "accountId": "001Ws00003naGX2IAM", "startDateTime": "2025-05-14T21:18:09.686748780Z", "name": "Expansion Plans Discussion", "duration": "00:00:00" }
```

Output

```
{ "newInteraction": { "sObjectInfo": { "apiName": "Interaction", "label": "Interaction" } } }
```

Select Action

Create a To Do (CreateToDo)

Create a task record based on user input. You must call this createToDo when user explicitly asks for 'Set a reminder', 'Add a reminder', 'Create a task', 'Create a to do'

Input

```
{ "subject": "Add Richard Bennett as a contact", "description": "Add Richard Bennett, the new Director of Operations, as a key contact on the project." }
```

Output

```
{ "taskId": "00Tw0000080DCPMA4", "resultMessage": "Sure, I created a task record:  
Subject: <a href=\"/00Tw0000080DCPMA4\">Add Richard Bennett as a contact</a>." }
```

Select Action

Create a To Do (CreateToDo)

Create a task record based on user input. You must call this createToDo when user explicitly asks for 'Set a reminder', 'Add a reminder', 'Create a task', 'Create a to do'

Conversation Preview

I've created the interaction record. Here are the details:

Account ID: Morris Roas

Start Time: 5/14/2025, 11:18:09 AM

End Time: 5/14/2025, 11:18:09 AM

Description: Met with Ju to discuss expansion plans.

Account Plan Objective: Expansion

Sure, I created the task record.

Subject: Add Richard Bennett as a contact

Task Subtype: Create

Priority: High

Status: Not Started

Description: Add Richard Bennett, the new Director of Operations, as a key contact on the project.

Sure, I created the task record.

Subject: Add Richard Bennett as a contact

Task Subtype: Create

Priority: High

Status: Not Started

Description: Add Richard Bennett, the new Director of Operations, as a key contact on the project.

Describe your task.

Capture Every Interaction Automatically

Action: Create Opportunity & Get Interactions by Date

Instant opportunity creation for greater efficiency



Opportunity Creation

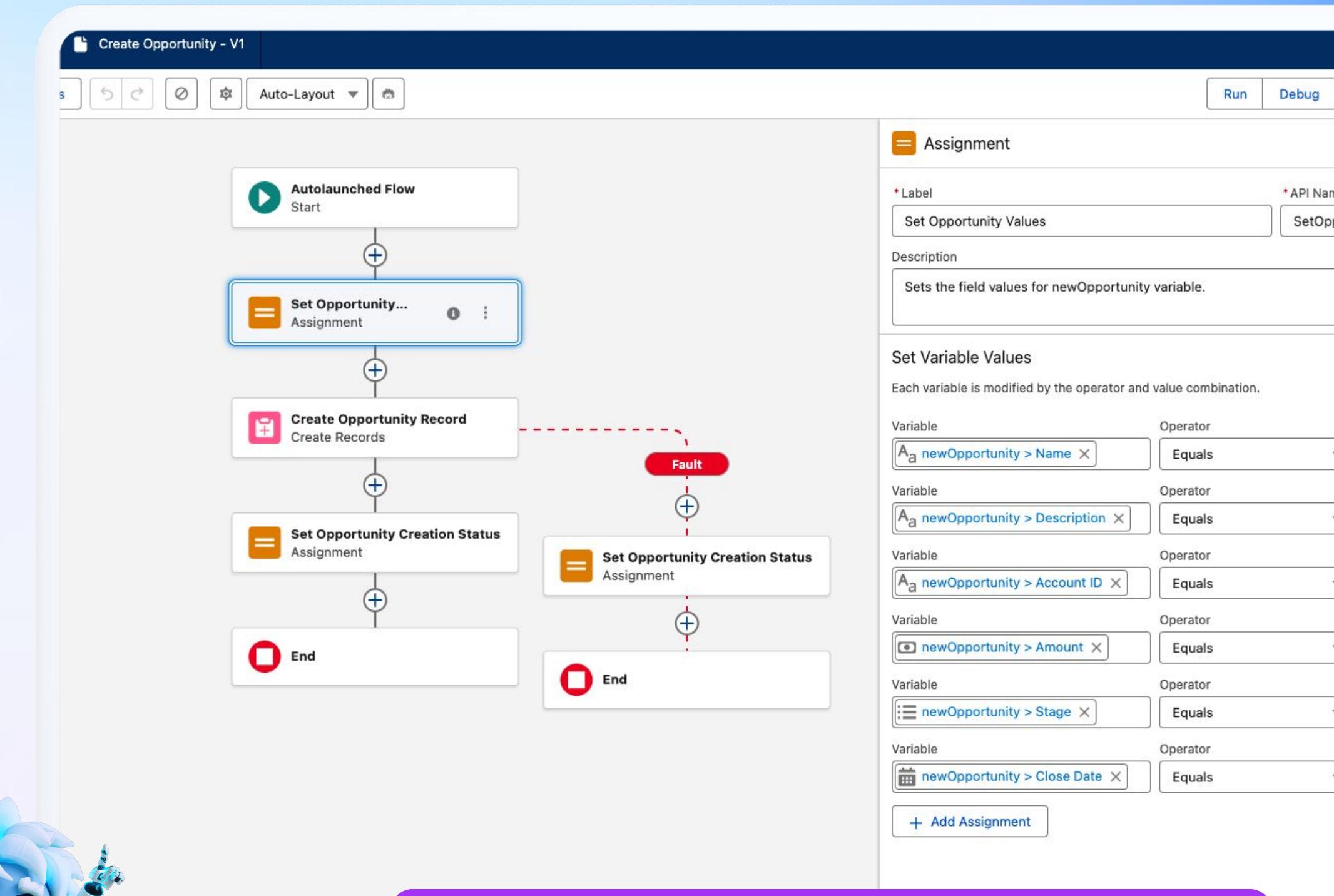
Automatically create a new sales opportunity directly from the account or relationship context.

Pre-fills key fields like account name, contact, and related products to streamline pipeline creation and accelerate deal tracking.

Get Interactions by Date

Pulls a chronological list of all client interactions: calls, meetings, emails within a specified timeframe

Helps bankers quickly review recent touchpoints before meetings or during account planning



Rapid Opportunity Creation

Agentforce For Financial Services: Banking Service Assistance

Your trusted autonomous agent for every service experience



Financial Services Cloud for Retail Banking Service

Service purpose-built for how Banks actually work



Rapid request resolution with preconfigured templates for disputes, account changes, and more



Connect front office to core systems giving reps real-time account and transaction data and a complete view of the customer



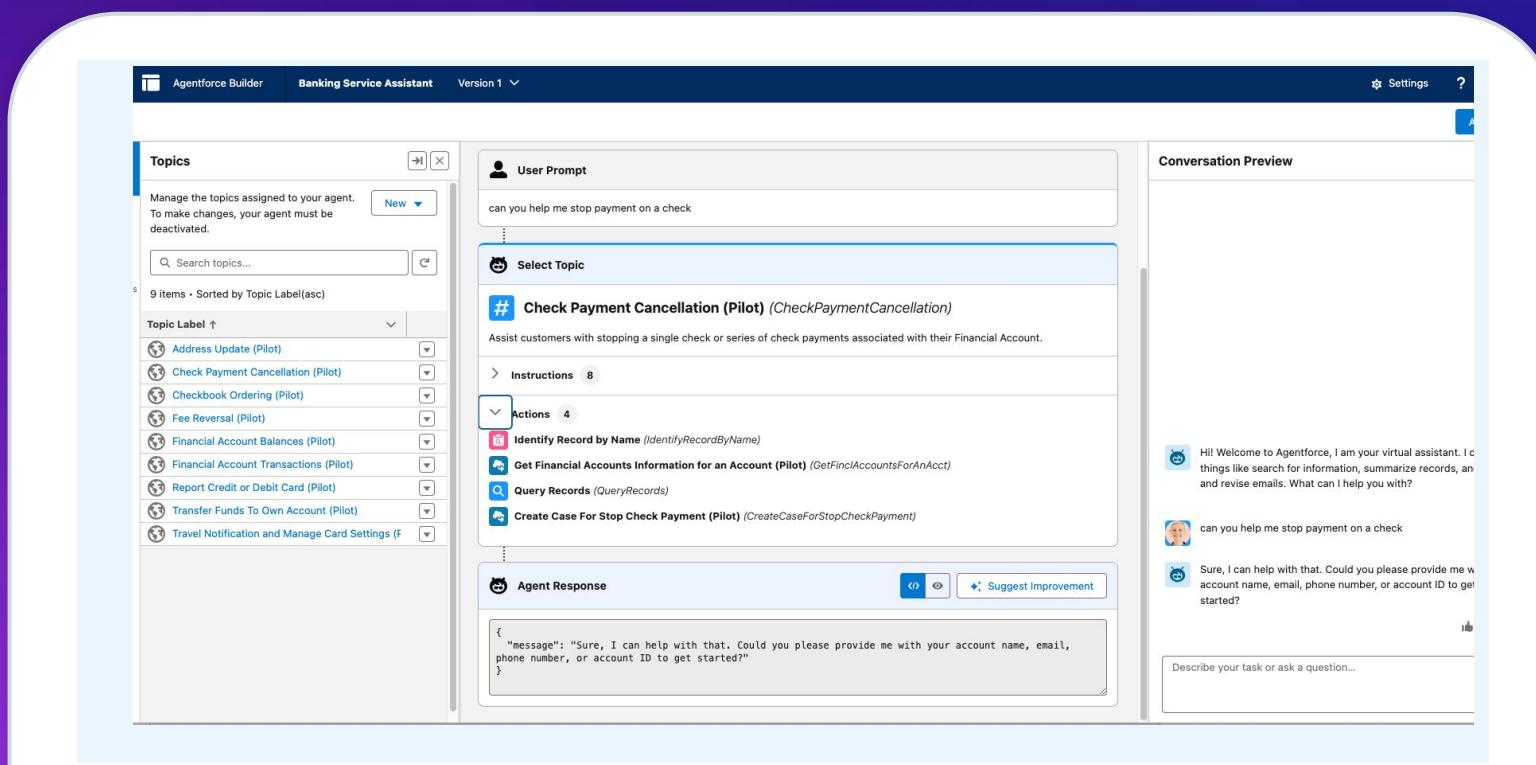
Automate routine tasks with intelligent agents so service agents can spend more time on complex issues and supporting customers

A screenshot of the Salesforce interface for the Financial Services Cloud. The top navigation bar shows "Cumulus" and "Retail Banking Service". The main area is focused on a customer record for "Rachel Morris" from "Mission St Branch, Austin, TX".

- Timeline:** Shows a list of recent interactions: "Dispute Transaction" (February 15, 2024), "Fee Reversal" (January 31, 2024), "Marketing Email Mortgage Offer" (January 11, 2024), "Branch Interaction" (December 01, 2023), and "Account Inquiry" (October 27, 2023). The "Account Inquiry" entry includes details: Verified: Yes, Duration: 00:11:47, and On-behalf.
- Actions:** A section with buttons for "Reset Password", "Reorder Checkbook", "Update Address", and "Raise Transaction Dispute".
- Alerts:** A list of 4 alerts: "Mortgage Account (Ending 3245) is on hold", "Possible fraudulent transaction on Cash Rewards Visa Signature Account Ending - 4568", and "Regular Checking Account (ending 5432) is in overdraft".
- Accounts:** A tabbed section showing "Saving & Checking Accounts" and "Credit Cards". Under "Saving & Checking Accounts", it lists "Regular Checking" (Ending - 5432, Primary Owner, USD 1,120.00) and "Super Saver" (Ending - 5222, Primary Owner, USD 8,720.00).
- Next Best Action:** A sidebar with a section titled "There is a high likelihood of converting this client to VIP: Savings goal achieved. Offer them a checklist for home buyers navigating uncertain times." with a "Sent!" button.
- Einstein:** A sidebar with a "What's going on with Rachel" section, a "Customer Account Summary" for Rachel Morris, and an "Attention" section with a credit card alert and a case regarding a potential Transaction Dispute.
- 360 Customer View For Customer Single Source of Truth:** A large, bold text at the bottom of the interface.

FSC For Service Release

What's new Launching June '25



Agentforce Builder Banking Service Assistant Version 1

Topics

User Prompt

can you help me stop payment on a check

Select Topic

Check Payment Cancellation (Pilot) (CheckPaymentCancellation)

Assist customers with stopping a single check or series of check payments associated with their Financial Account.

Instructions 8

Actions 4

Identify Record by Name (IdentifyRecordByName)

Get Financial Accounts Information for an Account (Pilot) (GetFinAccountsForAnAcct)

Query Records (QueryRecords)

Create Case For Stop Check Payment (Pilot) (CreateCaseForStopCheckPayment)

Agent Response

```
{ "message": "Sure, I can help with that. Could you please provide me with your account name, email, phone number, or account ID to get started?" }
```

Agentforce Banking Service Assistance

Handle everyday banking requests like card issues, address changes, fee questions, transfers, and more with a conversational agent that is trained on your core banking data and workflows.



Service Innovation

Banking Service Assistance

AI Agents with Banking Expertise

Deliver fast, trusted customer service with Agentforce powered by pre-built banking workflows and your customer data.

Lower Cost to Serve

Resolve everyday requests faster, reducing costs and allowing service teams to focus on relationship-driven work.

Pre-Built and Easy to Deploy

Get setup in minutes with templates in Financial Services Cloud and customize fast with clicks not code

Cumulus Mobile App:

- Accounts (1):** Saver Account, Account Number 2000137849900, Available Balance \$3,400.00.
- Goals (1):** Baying a Car, Target Cost \$3000, Target Date Oct, 2025, Progress 25%.

Salesforce Financial Services Cloud:

- Customer Profile:** Rachel Morris, Mission St Branch, Austin, TX.
- Alerts:** Mortgage Account (Ending 3245) is on hold, Possible fraudulent transaction on Cash Rewards Visa Signature Account Ending - 4568, Regular Checking Account (ending 5432) is in overdraft.
- Accounts:**

Account Type	Ending	Role	Available Balance
Regular Checking	5432	Primary Owner	USD 1,120.00
Super Saver	5222	Primary Owner	USD 8,720.00

Banking Service Assistance Agent In Action



Interaction



I'm Agentforce
Banking Agent, How
Can I Help?



I lost my
Adventure Credit
Card. Can I cancel
it and order a
replacement?

Topics

Agent picks the right topic and follows the instructions

View Transactions

View Balances

Report Lost Card

Fee Reversal

Transfer Funds

Stop Check Payment

Order Checkbook

Travel Notification

Address Update

Actions

1

Address Update

2

Lost Card Replacement

3

Financial Account Lookup

4

Fee Reversal

5

Lost Card Replacement

6

Stop Check Payment & Order Checkbook

7

Plus More!

Agent enriches actions



CRM



Data Cloud



External



User Input

Outcome



Faster resolution times & more personalized service

Improved customer satisfaction and retention

Cost savings through case deflection

More efficient customer service teams and reduced case handling time

Einstein Trust Layer

Action: Get Address & Update Address



Streamlined Address Updates

Retrieves customer address and updates across core systems automatically, validating against approved sources and eliminating errors, keeping every downstream process compliant and audit-ready.

The screenshot shows the Banking Service Assistant interface, Version 1. On the left, a sidebar lists various actions: New, bel(asc),ation (Pilot), ilot,ices (Pilot), actions (Pilot), Card (Pilot), Account (Pilot), and Manage Card Settings (F). The main area displays the "Address Update (Pilot) (AddressUpdate)" action. It includes instructions, actions (Query Records, Get Financial Account Addresses (Pilot), Create Case For Financial Account Address Update (Pilot)), and a "Select Action" step for "Query Records (QueryRecords)". The input is a JSON query: { "query": "Find the account for Rachel Morris" }. The output is a partial JSON response: { "result": [{ "sObjectInfo": { "apiName": "Account", "id": "001Ws00003nanU" }] }. A message at the bottom says "Missing information. User input required." A "Select Action" step follows. On the right, a "Conversation Preview" shows a conversation between an AI agent and a user named Rachel Morris. The user asks to update a customer address, and the AI asks for the customer name or account ID. The AI then lists several account records for Rachel Morris, including Billing, Shipping, Rewards Card, Stratus Personal Loan, Stratus Checking, and Auto Loan records, each with their respective account IDs. A "Submit" button is at the bottom of the conversation preview.

Banking Service Assistant Version 1

Select Topic

Address Update (Pilot) (AddressUpdate)

Helps customers update their account-related and financial account-related addresses.

Instructions 9

Actions 3

Query Records (QueryRecords)

Get Financial Account Addresses (Pilot) (GetFinancialAccountAddresses)

Create Case For Financial Account Address Update (Pilot) (CreateCaseForFinclAcctAddrUpdt)

Select Action

Query Records (QueryRecords)

Finds and retrieves Salesforce CRM records based on user input and specific conditions, such as field values. This action automatically identifies the correct records and object type. e.g. 'Find all open opportunities created in the last 5 days sorted by created date.'

Input

```
{ "query": "Find the account for Rachel Morris" }
```

Output

```
{ "result": [ { "sObjectInfo": { "apiName": "Account", "id": "001Ws00003nanU" } } ] }
```

Missing information. User input required.

Select Action

Conversation Preview

Hi! Welcome to Agentforce, I am your virtual assistant. things like search for information, summarize record, draft and revise emails. What can I help you with?

I need to update an customer address

Sure, I can help with that. Could you please provide customer name or account ID?

Rachel Morris

Please select the address you want to update for Rachel Morris.

Billing : 590 Geary St., San Francisco, CA 94102
Account ID : 001Ws00003nanU...

Shipping : 1 Market Street, San Francisco, CA 94103
Account ID : 001Ws00003nanU...

Rewards Card - 9954 : Looks like a rewards card.
Financial Account ID : a7kWs0000...

Stratus Personal Loan - 6985 : Looks like a personal loan.
Financial Account ID : a7kWs0000...

Stratus Checking - 2390 : 136 CI...
Financial Account ID : a7kWs0000...

Auto Loan - Standard - 3762 : 136 CI...
Financial Account ID : a7kWs0000...

Submit

Describe your task or ask a question...

Fast Address Changes

Action: Create Lost Card Case

Peace of mind and streamlined service team operations



Session Start

Session Started: May 14, 2025, 01:53 PM MST
Session ID: 9243c75d-3309-4972-b4ea-4427caa40f8c

"I need help with a lost card"

Plan ID: 7e7a8d85be9e

User Prompt

I need help with a lost card

Select Topic

Report Credit or Debit Card (Pilot) (ReportCreditOrDebitCard)
Helps customers report their credit or debit card as lost, stolen, destroyed, or captured by an ATM.

Instructions 7

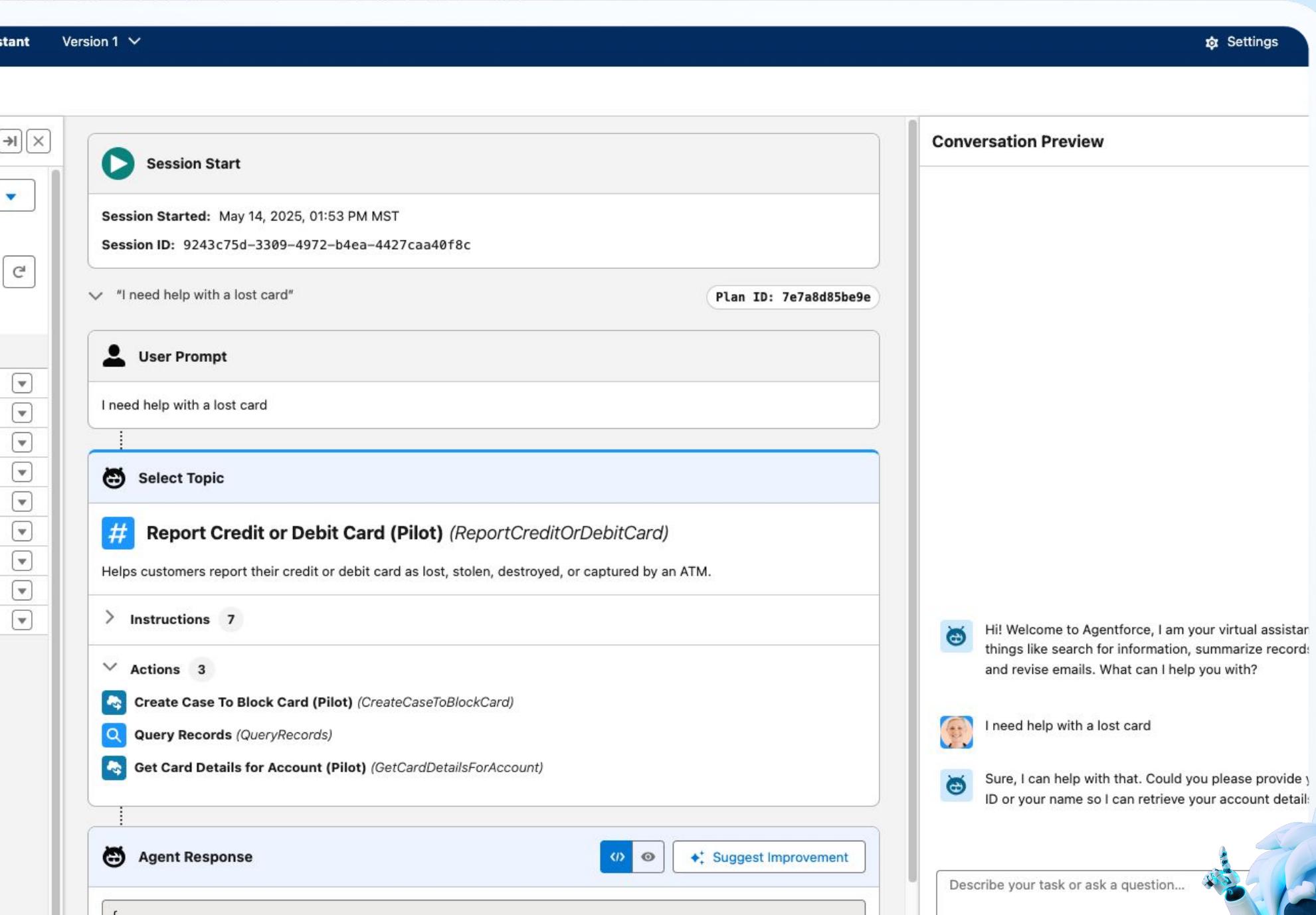
Actions 3

Create Case To Block Card (Pilot) (CreateCaseToBlockCard)
Query Records (QueryRecords)
Get Card Details for Account (Pilot) (GetCardDetailsForAccount)

Agent Response

Suggest Improvement

Stress Free Lost Card Resolution



Report Lost or Stolen Card

Lost or stolen cards closed quickly and a lost card case created to provide transparency on the customer's recent interaction

Customers stay protected faster while service teams avoid the manual back-and-forth that drives up handle time.



Describe your task or ask a question...



Action: Create Travel Notification & Update International Use Settings



Stress Free Travel

Capture travel and flip international flag in real time so customers never face an unexpected card declined abroad.

Built-in geo-fencing safeguards and case logging protect the bank while delivering swipe-anywhere freedom.

The screenshot shows the Salesforce Agent Builder interface. The top navigation bar says "Agent Builder" and "Agentforce Banking Agent". The main area is titled "Topic Details" with a sub-tab "Topic Configuration" selected. The "Topic Label" is set to "Travel Plan Notification". The "Classification Description" is "Assists customers in setting up travel notifications to avoid fraudulent transaction blocks while traveling. This topic also includes services such as setting up automatic bill payments, providing travel tips, and sharing contact numbers for bank branches or partners in the destination country for emergency support." The "Scope" is described as "You are responsible for ensuring smooth financial operations for customers during their travels. This includes setting up travel notifications, enabling automatic payments, offering travel advice, and providing emergency contact details for banking support in the destination country." Below this, there are sections for "Instructions" and "Actions". The "Instructions" section contains the text "Begin by confirming the customer's travel dates and destination. Identify whether travel". The "Actions" section shows a list of actions. To the right, a "User Prompt" box contains the message "i am travelling to Europe. Need help". The "Select Topic" section shows the topic "Travel_Plan_Notification" with its description. The "Conversation Preview" on the right shows a series of messages: "Hi! I'm your helpful bot.", "hey", "Hello! How can I assist you with your banki", "i am travelling to Europe. Need help", and "I can help you set up travel notifications and smooth financial operations during your trip. Please provide your travel dates and confirmation details to set up notifications for one or multiple accounts." A text input field at the bottom says "Describe your task or ask a question...".



Travel With Confidence

Action: Get Financial Account Transactions, Fee Transactions & Fee Reversal



Banking Service Assistant Version 1

Session Start

Session Started: May 14, 2025, 01:35 PM MST

Session ID: 3ef969f0-2462-4852-997b-4d8a5aedd912

Plan ID: e5ca5d5f83d5

Conversation Preview

"i need to reverse a fee"

User Prompt

i need to reverse a fee

Select Topic

Fee Reversal (Pilot) (FeeReversal)

Helps customers reverse fees charged to their financial accounts, such as maintenance fees, overdraft fees, and other service-related fees.

Instructions 10

Actions 4

Agent Response

{ "message": "Sure, I can help with that. Could you please provide me with your account ID or customer name to get started?" }

Suggest Improvement

Instant Account & Fee Transaction Data

Display Real-Time Accounts And Balances

Quickly surfaces a customer's transaction history in real-time, pulled straight from the core banking system, so CSRs can launch a service flow, all without leaving the console

Rapid Fee Reversals

Surfaces any fees and explains charges in plain language, and when policy allows, reverses them instantly.

Auto-routed approvals and audit trails make fee reversals a 30-second task, not a 3-day saga.

Action: Stop Check, Transfer Funds, Order Checkbook



Stop Payment

Quickly place a stop payment on any check or ACH from a single workflow, simplifying the process and delivering a better experience

Order Checkbook

Place a check order without accessing another system, slashing back-office touchpoints for greater efficiency.

Convenient Funds Transfers

Move money between customer accounts in seconds. Customers receive instant confirmation so transfers are fast, error-free, and fully auditable.



The screenshot shows the Banking Service Assistant interface. At the top, it says "Banking Service Assistant Version 1". The "User Prompt" section contains the message "can you help me stop payment on a check". In the "Select Topic" section, the topic "# Check Payment Cancellation (Pilot) (CheckPaymentCancellation)" is selected, with a description: "Assist customers with stopping a single check or series of check payments associated with their Financial Account." The "Actions" section lists four actions: "Identify Record by Name (IdentifyRecordByName)", "Get Financial Accounts Information for an Account (Pilot) (GetFinclAccountsForAnAcct)", "Query Records (QueryRecords)", and "Create Case For Stop Check Payment (Pilot) (CreateCaseForStopCheckPayment)". The "Agent Response" section contains the following JSON message:

```
{
  "message": "Sure, I can help with that. Could you please provide me with your account name, email, phone number, or account ID to get started?"
}
```

Fast & Error Free Workflows



Agentforce For Financial Services: Insurance Service Assistance

Augment CSRs with secure, AI-powered policy & quote summaries to enhance policyholder interactions



Digital Insurance

Integrate core insurance processes with modern digital engagement, unified customer data, and trusted, intelligent automation



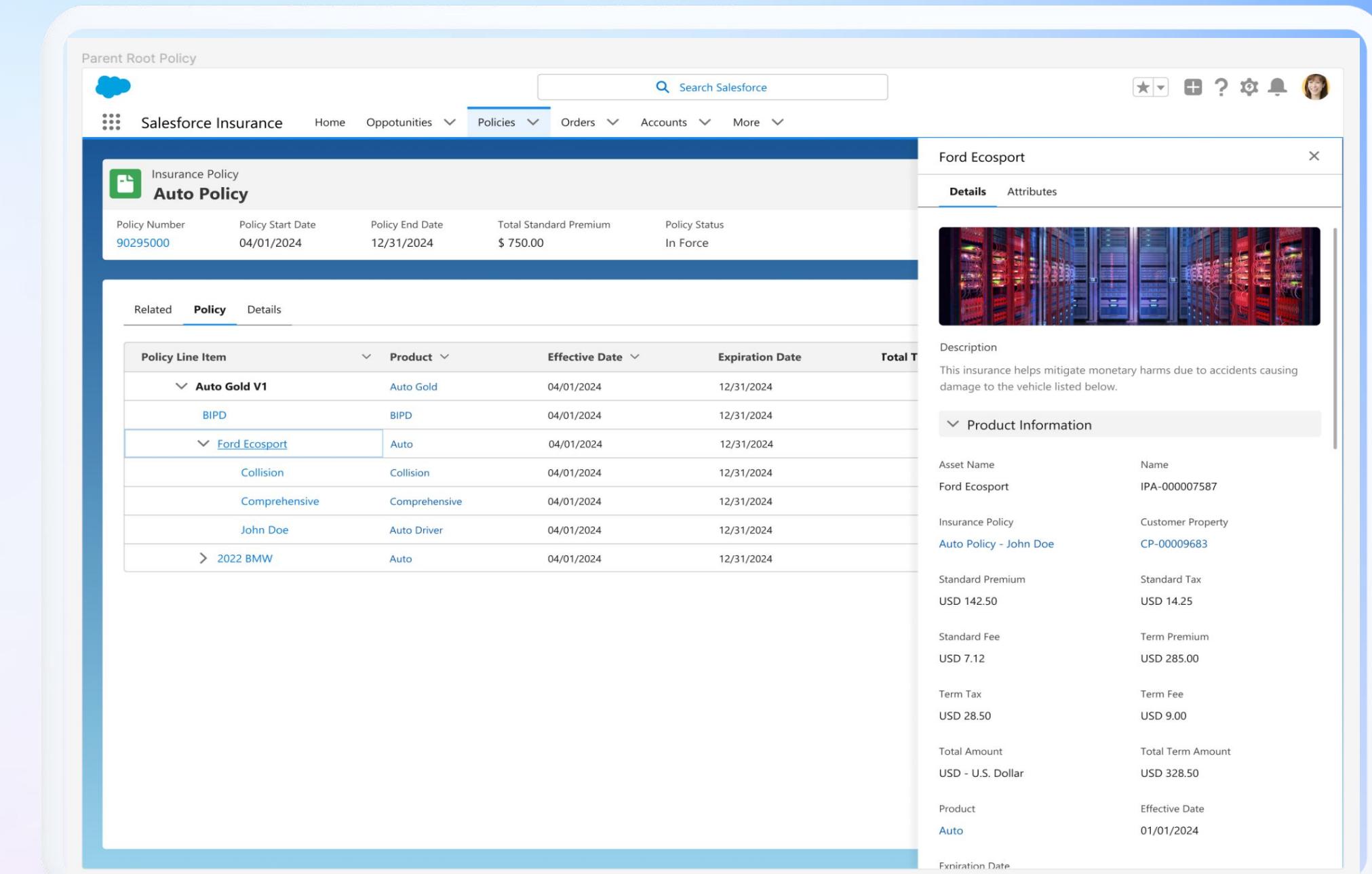
Grow revenue with faster product innovations & launches



Empower insurance teams to focus on high-value tasks, while AI agents handle routine ones



Reduce cost and increase operational efficiency through process automation



Parent Root Policy

Insurance Policy
Auto Policy

Policy Number	Policy Start Date	Policy End Date	Total Standard Premium	Policy Status
90295000	04/01/2024	12/31/2024	\$ 750.00	In Force

Related **Policy** Details

Policy Line Item	Product	Effective Date	Expiration Date	Total T
Auto Gold V1	Auto Gold	04/01/2024	12/31/2024	
BIPD	BIPD	04/01/2024	12/31/2024	
Ford Ecosport	Auto	04/01/2024	12/31/2024	
Collision	Collision	04/01/2024	12/31/2024	
Comprehensive	Comprehensive	04/01/2024	12/31/2024	
John Doe	Auto Driver	04/01/2024	12/31/2024	
2022 BMW	Auto	04/01/2024	12/31/2024	

Ford Ecosport

Details Attributes

Description

This insurance helps mitigate monetary harms due to accidents causing damage to the vehicle listed below.

Product Information

Asset Name	Name
Ford Ecosport	IPA-000007587
Insurance Policy	Customer Property
Auto Policy - John Doe	CP-00009683
Standard Premium	Standard Tax
USD 142.50	USD 14.25
Standard Fee	Term Premium
USD 7.12	USD 285.00
Term Tax	Term Fee
USD 28.50	USD 9.00
Total Amount	Total Term Amount
USD - U.S. Dollar	USD 328.50
Product	Effective Date
Auto	01/01/2024
	Expiration Date

Manage the entire policy lifecycle with ease and efficiency

Insurance Service Assistance

salesforce

AI Agents with Insurance Expertise

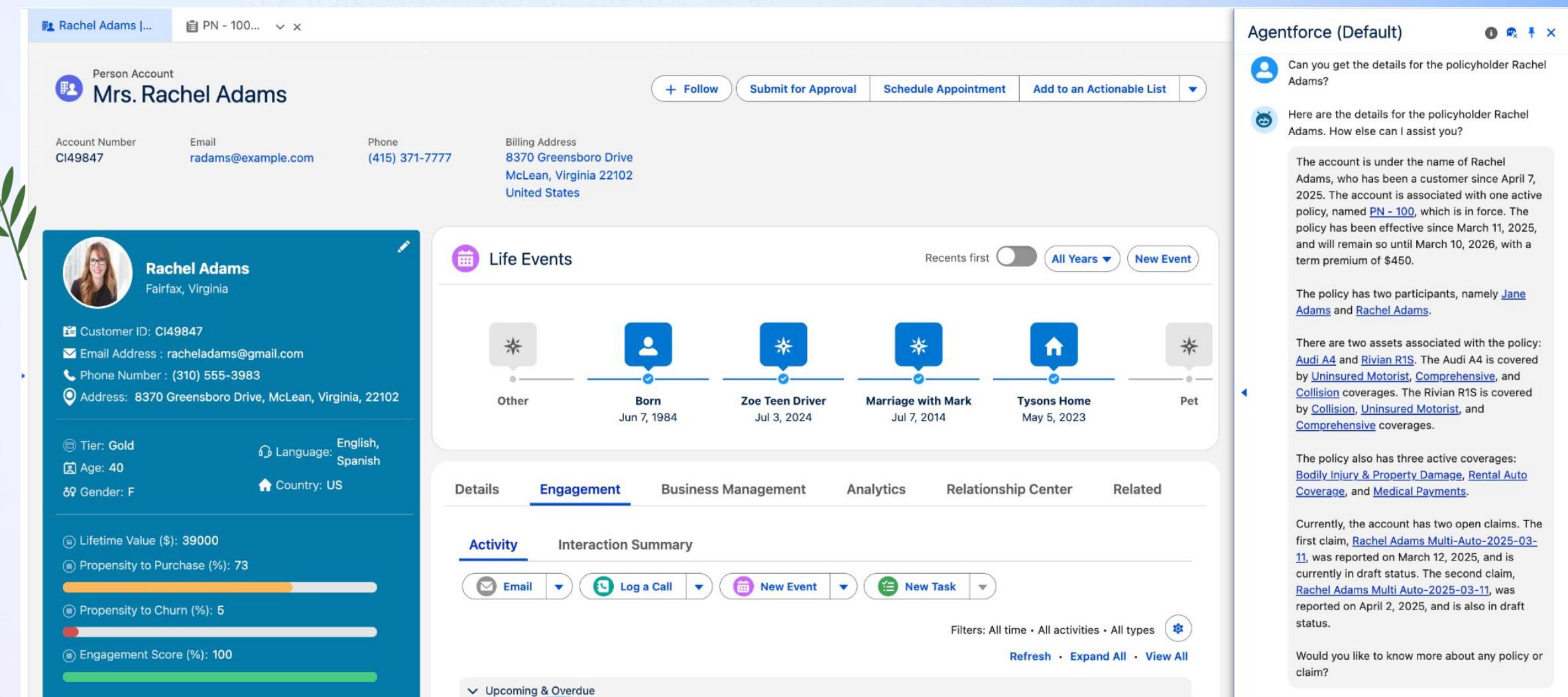
Deliver fast, trusted customer service with Agentforce powered by pre-built insurance workflows and policyholder data

Improve Efficiency with AI-powered Policyholder & Quote Summaries

Streamline processes by summarizing policyholder & quote details helping reps deliver faster, more accurate resolutions

Pre-Built and Easy to Deploy

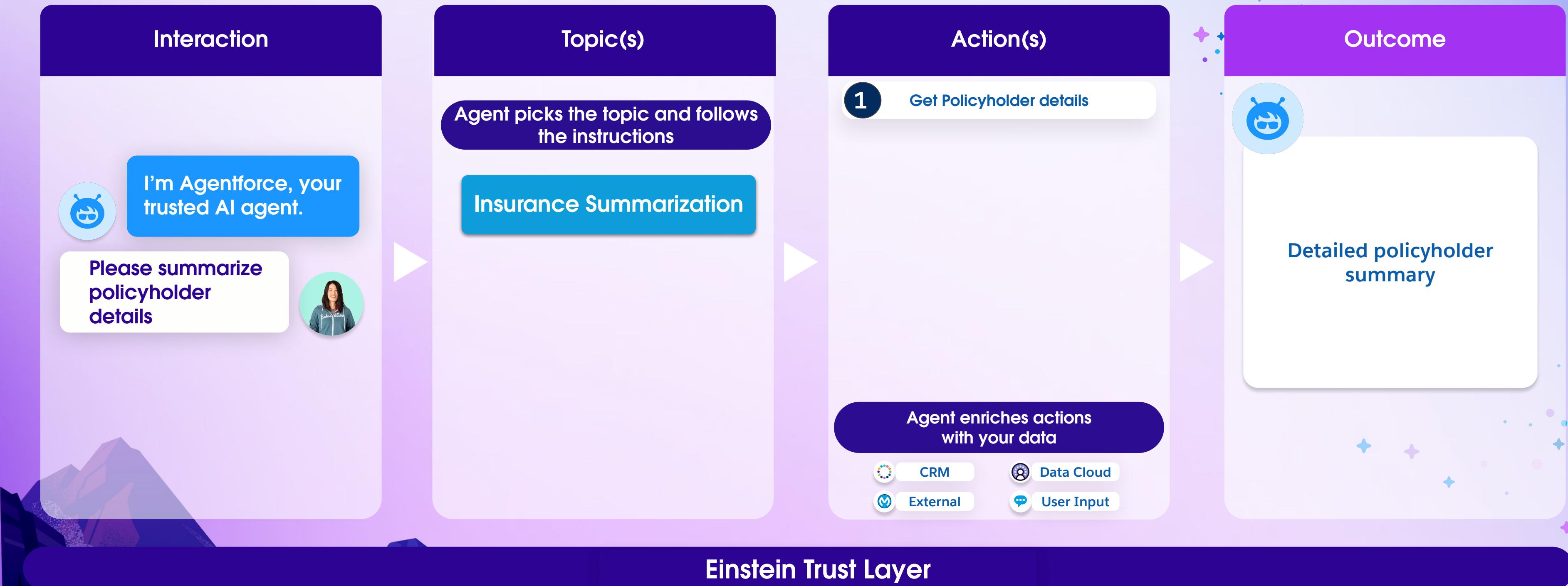
Get set up in minutes and customize fast - with clicks not code, to enhance policyholder retention



The screenshot displays the Agentforce interface within the Salesforce Financial Services Cloud. The main view shows a policyholder profile for 'Mrs. Rachel Adams' with details like Account Number CI49847, Email radams@example.com, and Phone (415) 371-7777. Below this is a summary card for 'Rachel Adams' from 'Fairfax, Virginia' with fields for Customer ID, Email Address, Phone Number, and Address. The summary also includes demographic information (Tier: Gold, Age: 40, Gender: F) and engagement metrics (Lifetime Value: \$39000, Propensity to Purchase: 73%, Propensity to Churn: 5%, Engagement Score: 100%). To the right, a sidebar titled 'Agentforce (Default)' provides an AI-generated summary of the policyholder's details, mentioning her as a customer since April 7, 2025, with a policy named 'PN - 100' effective from March 11, 2025, to March 10, 2026, with a term premium of \$450. The sidebar also notes two assets: an Audi A4 and a Rivian R1S, and three active coverages: Bodily Injury & Property Damage, Rental Auto Coverage, and Medical Payments. It also mentions two open claims, one for March 12, 2025, and another for April 2, 2025, both in draft status. The interface includes tabs for 'Details', 'Engagement' (which is selected), 'Business Management', 'Analytics', 'Relationship Center', and 'Related'. Below the engagement tab are buttons for 'Email', 'Log a Call', 'New Event', and 'New Task'. A filter bar at the bottom allows for 'All time', 'All activities', 'All types', 'Refresh', 'Expand All', and 'View All'.



Insurance Service Assistance In Action



Action: Get Policyholder Details



Policyholder Summary

Presents key policyholder information including insurance policies, premiums, coverage and open claim details.

Person Account
Mr. Will Young

Related Details Assets

Account Owner
 Admin User

Account Name
Mr. Will Young

Make

Model

Account State
California

Social Security Number
US-SSN1290

Account Currency
USD - U.S. Dollar

> Additional Information

Agentforce

The account name is Will Young, and the customer has been with us since April 21, 2025. The account holds 2 active policies.

****Policy Details****

[Yong-Pol-Health-1002](#) is a policy effective from April 2, 2025, to December 31, 2025, with a term premium of \$631.48.

[Yong-Pol-Health-1001](#) is a policy effective from March 1, 2025, to February 28, 2026, with a term premium of \$838.14.

****Policy Coverage Details****

No active coverages are linked directly to the policies.

****Policy Participant Details****

The participant [Primary Member](#) is associated with the policy [Yong-Pol-Health-1002](#). The participant is not the policyholder.

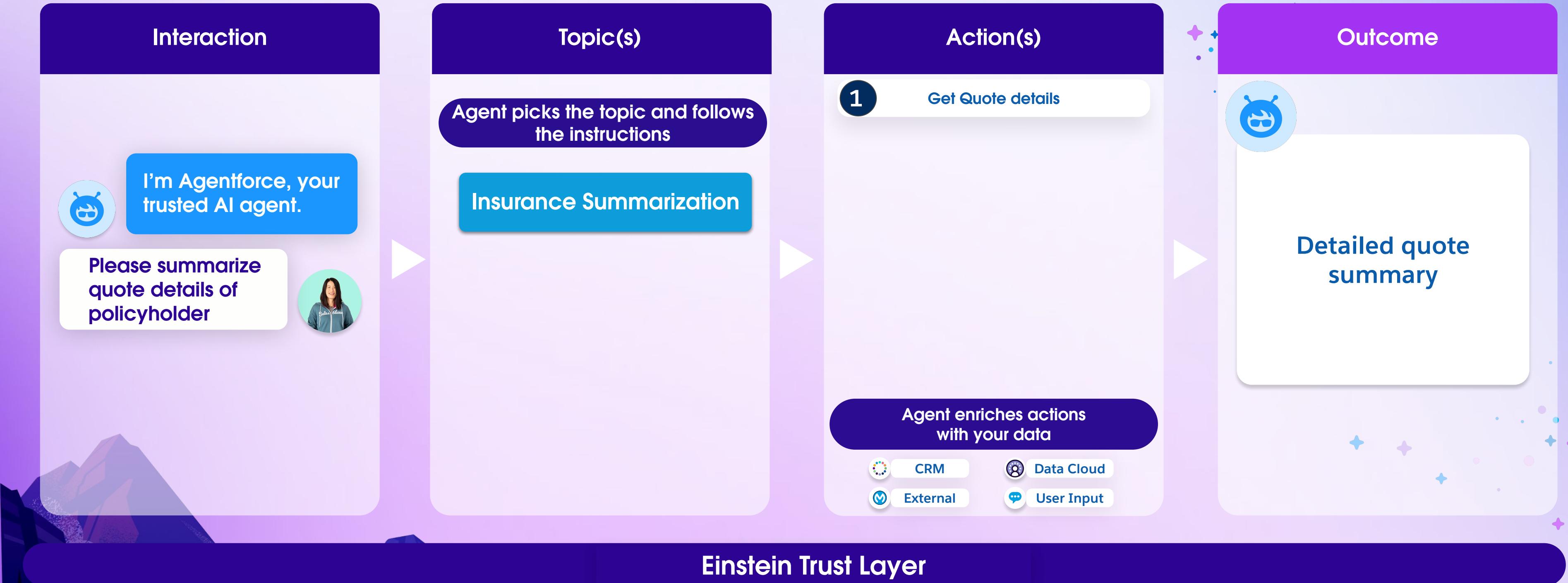
The participant [Primary Member](#) is associated with the policy [Yong-Pol-Health-1001](#). The participant is not the policyholder.

Describe your task or ask a question...

Generate Policyholder Summary



Insurance Service Assistance In Action



Action: Get Quote Details

salesforce

Quote Summary

Presents all quote related information including vehicle information, coverage options, limits, deductibles, and premium cost.

Person Account
Mr. Will Young

Related Details Assets

Account Owner
Admin User

Account Name
Mr. Will Young

Make

Model

Account State
California

Social Security Number
US-SSN1290

Account Currency
USD - U.S. Dollar

> Additional Information

Agentforce

The quote Adam Smith Auto Quote for Audi A3 is in Approved status. The Start Date is 2025-04-01, and the End Date is 2025-11-30. The Total Amount is \$1,690.35.

The quote line item Collision has a deductible of \$100 and a limit of \$1,000. The Net Total Price is \$151.88.

The quote line item Bodily Injury & Property Damage has a bodily injury per person limit of \$1,500, a bodily injury per accident limit of \$1,000, a property damage per accident limit of \$1,000, and a deductible of \$100. The Net Total Price is \$189.85.

The quote line item Driver includes the insured party Adam Smith, with an age first licensed of 15 and driver accident points of 5. The Net Total Price is \$0.67.

The quote line item Uninsured Motorist has a limit of \$5,000 and a deductible of \$100. The Net Total Price is \$284.78.

The quote line item Auto includes an Audi SUV with an auto value of \$100,000. The Net Total Price is \$436.66.

The quote line item Auto Silver has a Net Total Price of \$626.51.

how many drivers are added on above quote

The quote Adam Smith Auto Quote for Audi A3 includes one driver, Adam Smith.

Describe your task or ask a question...

Generate Quote Summary

Digital Insurance Enhancements

Bulk Policy & Quote Renewals

Bulk Renewals

GA | June 2025

Digital Insurance Enhancements

salesforce

Product Catalog Management Home [All Insurance Policies](#)

Insurance Policies [All Insurance Policies](#)

20 items • Sorted by Policy Name • Updated a few seconds ago

	<input type="checkbox"/> Policy Number	Name Insured	Expiration Date	Premium Amount	Status
1	<input type="checkbox"/> Auto Gold - 90295	John Smith	09/25/25	\$1700	Initial
2	<input type="checkbox"/> Auto Platinum - 84237	John Smith	09/25/25	\$1700	Expired
3	<input type="checkbox"/> Auto Platinum v2 - 77230	John Smith	09/25/25	\$1700	Initial
4	<input type="checkbox"/> Auto Gold V2 - 32403	John Smith	09/25/25	\$1700	Expired
5	<input type="checkbox"/> Auto Gold V3 - 32403	Cindy Baker	11/03/25	\$1400	Active
6	<input type="checkbox"/> Auto Platinum v2 - 77230	Cindy Baker	11/03/25	\$1400	Initial
7	<input type="checkbox"/> Home Sure - 233900	John Smith	11/03/25	\$1400	Expired
8	<input type="checkbox"/> Home Sure Plus - 233900	John Smith	11/03/25	\$1400	Active
10	<input type="checkbox"/> Home Sure v2 - 233900	John Smith	12/01/25	\$3200	Initial
11	<input type="checkbox"/> Home Sure v3 - 233900	John Smith	12/01/25	\$3200	Active
12	<input type="checkbox"/> Home Basic - 127713	Cindy Baker	12/01/25	\$3200	Initial
13	<input type="checkbox"/> Home Basic v3 - 127713	Cindy Baker	12/01/25	\$3200	Active
14	<input type="checkbox"/> Lorem Ipsum	John Smith	mm/dd/yy	\$1400	Initial
15	<input type="checkbox"/> Lorem Ipsum	John Smith	mm/dd/yy	\$1400	Initial
16	<input type="checkbox"/> Lorem Ipsum	John Smith	mm/dd/yy	\$1400	Initial
17	<input type="checkbox"/> Lorem Ipsum	John Smith	mm/dd/yy	\$1400	Initial

To Do List

Bulk Policy & Quote Renewals

Prebuilt Service Processes Enhancement

Cancel Insurance Policy

Cancel Insurance Policy

GA | June 2025

Pre-built Service Process Library



Actions

- Auto FNOL
- Proof of Insurance
- Cancel Policy
- Address Update
- Change billing cycle
- Manage Beneficiaries for Wealth
- Profile Changes for Wealth
- Manage Standing Instructions for Wealth
- Manage Complaints
- Transaction Disputes

Marketing - Home Loan Offer

Bank visit - Loan

Agentforce

Here's the comparison summary between the auto quotes.

Coverage Limit : Quote 1234567890 provides comprehensive coverage up to \$15,000, with collision coverage capped at \$6,000. Quote 7364571821 has greater coverage limits, with comprehensive protection up to \$20,000 and collision coverage up to \$7,500.

- Recommendation** : Quote 7364571821

Coverage Deductible : Quote 1234567890 has a \$500 comprehensive deductible and \$250 collision deductible. Quote 7364571821 has the same comprehensive deductible of \$500, but the collision deductible is also \$500.

- Recommendation** : Quote 7364571821

Policy Term : Both quotes have similar policy terms that last one year. This means that the coverage offered by each policy remains consistent for the set time period, providing stability and predictability in insurance coverage.

Premium : Quote 1234567890 has the lowest yearly price of \$1,200 and provides complete coverage for a single car. Quote 7364571821 has a higher yearly cost of \$1,900, which reflects additional vehicle coverage as well as the benefit of insuring another vehicle at a 20% premium discount.

BIAN inspired APIs for all integrations

Deploy same processes across channels

Customizable service process templates

Support multiple languages

Simplify the Policy Cancellation Service Process



Search...

Retail Banking Accounts Andy Flower | Acco... Andy Flower | ... Cancel I... X

Confirm Cancel Insurance Policy

Andy Flower

Policy Number	Effective Date	Expiry Date	Status
21312332	1/1/2025	12/31/2025	In Force

Cancel Insurance Policy Request Summary

Cancellation Effective Date	06/02/2025
Original Premium Amount	\$ 120.00
Modified Premium Amount	\$ 49.78
Refund Amount	\$ 70.22

Refunds and any outstanding premiums are processed after the cancellation date.

Insurance Policy Assets

Asset Name	Asset Code
Andy's Asset	1227398

Important Information About Policy Cancellation

- Coverage End Date:** Coverage under this policy ends on the selected cancellation date.
- Legal and Financial Impact:** Understand the legal or financial implications of not having coverage after cancellation.
- Refunds and Due Premiums:** Refunds or any outstanding premiums are processed only after the policy is canceled.
- Impact on Claims:** All ongoing claims must be resolved before cancellation. New claims aren't accepted after the policy cancellation process is initiated.

Previous Next

Cancel
Insurance Policy

Agentforce For Financial Services: Collections Assistance

Assistive agent and collections product enhancements



Collections & Financial Recovery For Financial Services



Optimize your collections process to keep lending accounts current and recoup funds faster



Boost the volume of collections cases you can efficiently manage with integrated outreach and automation



Enhance your rate of financial recovery with accurate customer data and AI



Help customers avoid default with predictive financial insights and payment options



I came up with a shorter version...

Here are some talking points

1. Outstanding Debt Overview:
Clearly state the amount owed, including fees or interest.

2. Offer Solutions
Present options for resolving the debt, such as a repayment plan, settlement, or extension. Explain the benefits of cooperation, like avoiding collection actions.

3. Negotiation and Agreement:
Be prepared to negotiate terms that are acceptable, within the guidelines of your organization.

4. Payment Methods:
Explain the available payment methods (online, mail, etc.). Be ready to assist with the payment process if necessary.



Re

Few Recommendation

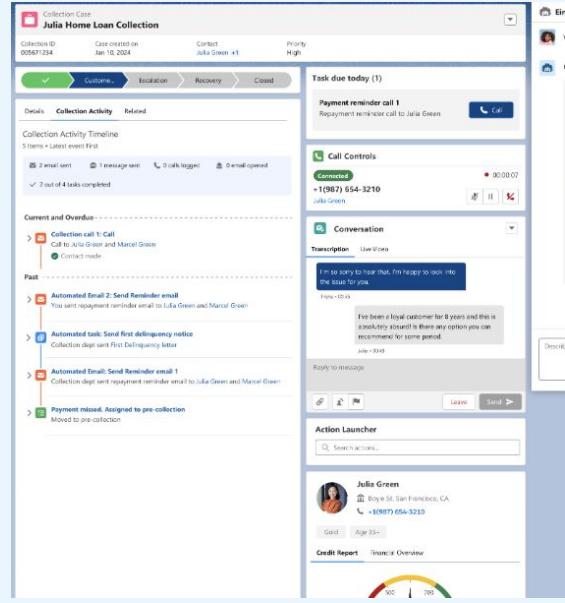
Restructure Loan Terms

Apply for moratorium

360 Customer View to Increase Collection Success

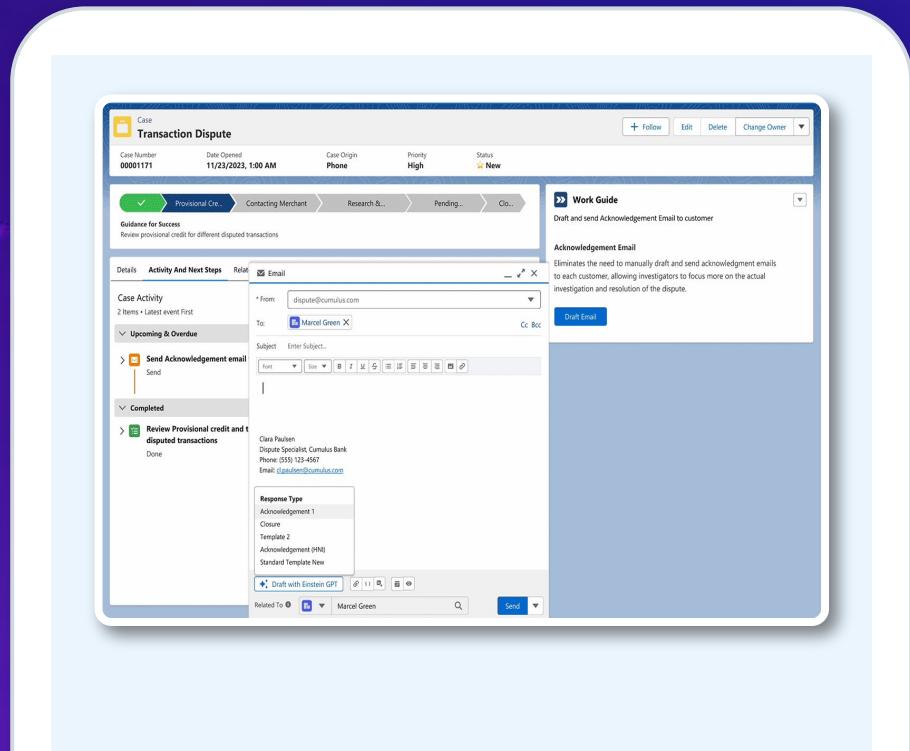
Collections Product Enhancements

What's new Launching June '25



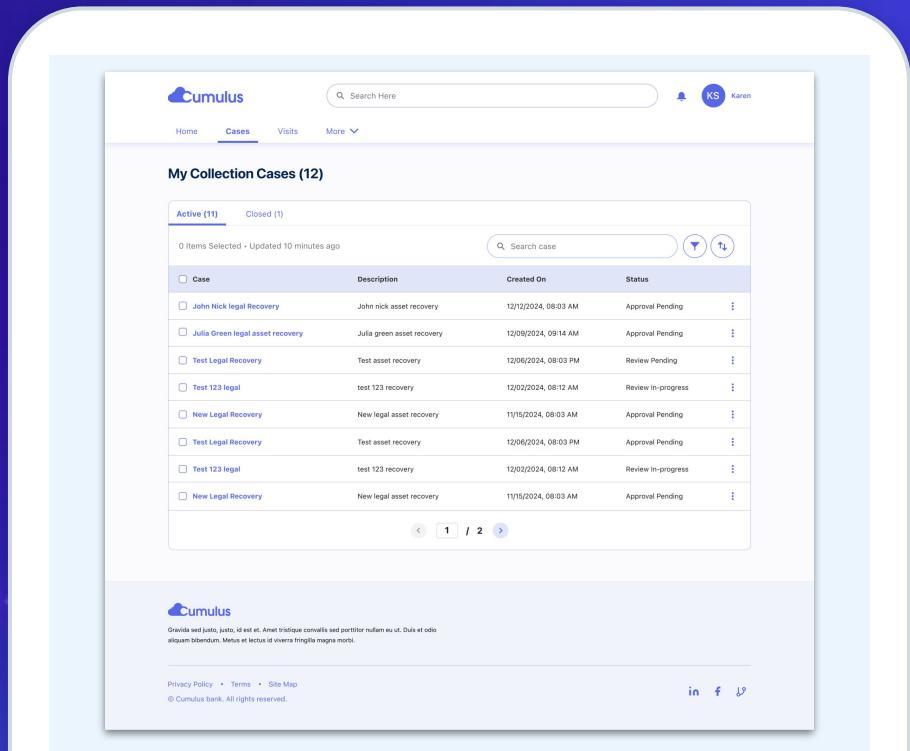
Agentforce Collections Assistance

Autonomous AI that drives more efficient collections teams and accelerates successful financial recovery



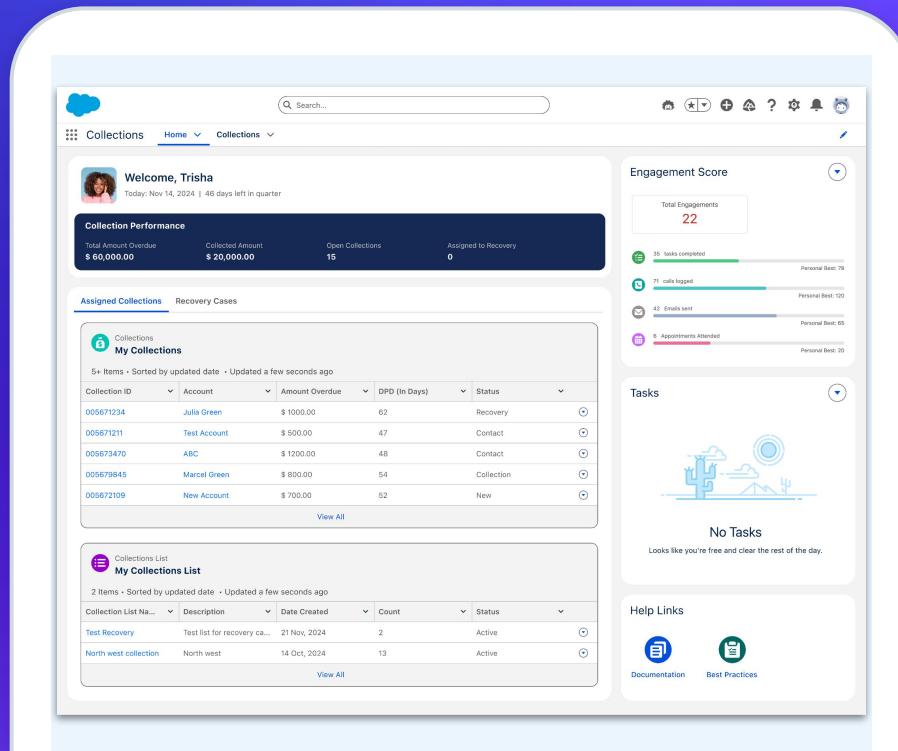
Marketing Cloud Integration

Run personalized outreach campaigns directly from Salesforce using Marketing Cloud on Core and Leverage collections data to trigger timely email/SMS reminders.



Recovery Portal

Launch a secure Experience Cloud portal for recovery agencies and enable real-time case tracking, data sharing, and status reporting.



Interaction Outcomes

Easily log collections interactions on Collection Plan records. Easily document call outcomes and trigger follow-up actions – ensuring compliance and faster resolution.

Collections & Financial Recovery Innovation

Collections Assistance

salesforce

AI Agents with Collections Expertise

Agents are pre-trained on delinquency stages, promise-to-pay rules, and legal requirements, speaking the exact language your collections and recovery teams use every day

Friction-Free Recovery

Teams book recoveries faster with auto-generated promise to pay capture and payment links for borrowers

Pre-Built and Easy to Deploy

Auto-generated personalized talking points and call scripts with real time guidance, arming collections teams with data and insights for greater recovery success

The screenshot shows the Salesforce Financial Services Cloud interface. The top navigation bar includes 'Collection', 'Home', 'Collections' (selected), and 'CC-0001534'. A search bar is at the top right. The main content area displays a collection plan for 'Julia Green' (Boyle St, San Francisco, CA, julia.green123@gmail.com, +1(987) 654-3210). It shows 'Collection Plan Activities' with a toggle for 'Only show activities with insights' and a 'New Promise to Pay' button. Below this is an 'Upcoming and Overdue' section with items like 'First Delinquency no...', 'Reminder email 1', and 'Assigned to pre-collection'. The 'Promise to Pay' tab is selected in the 'Details' section, showing a table with 1 item: PP-0094589213. The table includes columns for Promised Amount (\$1000.00), Number of Installments (2), and Created Date (14 May, 2024). The table also shows two payment records: one for \$500 on 21 May, 2024 (Active), and one for \$500 on 14 May, 2024 (Expired). To the right, there are sections for 'Knowledge' (Search...), 'Einstein Recommendations' (Last Updated 5:07 • 2 items, Relevance score 98%), and 'New setup' (0000001296 • Published • Newsletter, Last modified: 10/5/2020). A blue robot character is running at the bottom of the screen.

Collections Assistance Agent In Action



Action: Generate Talking Points

Provides employees with structured and contextual communication guidance



Personalized Talking Points

AI-Generated personalized call scripts and talking points rooted in your data, giving collections teams tailored openers and key balance, delinquency, and prior promise data for more efficient collections

Conversation Guidance

Real-time on-screen prompts recommend the next best question, payment option, or compliant disclosure, helping agents navigate every discussion smoothly toward resolution

The screenshot shows the Salesforce Collections interface. At the top, the navigation bar includes 'Collection', 'Home', 'Collections', and a dropdown for '005675548'. Below this, a card for '005674590' displays the 'Collections' section, showing an 'Overdue Amount' of '\$ 2000.00' and 'Days Past Due (DPD)' of '64 Days'. The 'Action Launcher' and 'Alerts' sections are also visible. The main content area shows a conversation with a customer named 'Alex - Collection Agent'. The AI-generated talking point is: 'Yes. I know I'm behind. I had reduced hours at work for several months and needed to make my mortgage and auto loan payments first so I don't lose my home or car. I also have some credit cards with other banks so I've had to choose which payments to make each month.' Below this, a real-time on-screen prompt from the AI recommends: 'Thanks for confirming and we appreciate you being a loyal customer of Cumulus for over 10 years. I've noticed that you've fallen a bit behind on your credit card payment and your deposit account balances have been trending down for the last six months. I wanted to let you know that your credit could be damaged with the overdue payments but we at Cumulus are here to help.' At the bottom, a user response is shown: 'Yes I understand. What are my options here.' Another AI-generated response follows: 'Based on our internal policies, we can offer you a payment holiday for two more weeks (no additional fees) but only if you make a payment of at least \$200 today.'

Action: Generate Promise to Pay & Payment Link

Instantly capture collections commitments and payments on Salesforce Pay Now



005674590

Julia Green
Boyle St, San Francisco, CA
julia.green123@gmail.com
+1(987) 654-3210

Collections
005674590

Overdue Amount
\$ 2000.00

Days Past Due (DPD)
64 Days

Einstein Prediction
No Active Prediction Available

Action Launcher
Search...

Alerts
No Active Alerts

Collection Activities
Refresh • Expand All • View All

Upcoming and Overdue

- Field agent assigned to this case
Credo created a task with
Description
Case assigned to available field agent based on the location and status
- Legal notice sent to ...
Credo sent a legal notice to Julia Green
- 2nd Reminder email sent
Credo sent a 2nd reminder notice to Julia Green
- 1st Reminder

Loan Plan (1)

Easy Payment Capture

◆ The next payment due date has been extended by one month

[View New Payment Plan](#)

◆ New payment link has been generated and sent to the customer

[View](#)

Payment Commitment

Auto-creates a Promise-to-Pay record with the agreed-upon amount and due date, links it to the collection case, and schedules reminders so borrowers and collections teams stay on track

Payment Collection

Generates a secure, one-click Salesforce Pay Now link tied to the customer's account, enabling immediate online payment and automatically logging transactions



Action: Legal Case Eligibility Check & Creation

Efficient legal actions rooted in your legal thresholds and customer data



Legal Case Eligibility Check

AI evaluates balance, days-past-due, prior outreach, and legal thresholds to confirm the account meets criteria for legal escalation, returning an instant go/no-go recommendation

Legal Case Creation

After eligibility check is confirmed, the agent auto-generates a fully documented case file; borrower profile, transaction history, and compliance notes, and creates the legal case



The screenshot shows a Salesforce interface for managing a collection case. The main window displays a collection activity for account 'Julia Green' (Boyle St, San Francisco, CA). The 'Edit Action' modal is open, showing the following details:

- Collection Status:** In-progress
- Action:** Initiate Bankruptcy
- Origin:** Call
- Create Case:** Checked

The background shows a list of collection activities:

- Field agent assigned to this case (Credo created a task with)
- Legal notice sent to ... (Credo sent a legal notice to Julia Green)
- 2nd Reminder email sent (Credo sent a 2nd reminder notice to Julia Green)
- 1st Reminder email sent (Credo sent a 1st reminder notice to Julia Green)

Streamlined Legal Case Creation

Collections Enhancements

Collections & Financial Recovery
product enhancements

3 Collections Enhancements

GA | June 2025

Collections Marketing Cloud Integration



Easily send personalized reminders and campaigns on marketing cloud

Execute targeted email and SMS campaigns to remind
overdue customers on Salesforce Marketing Cloud

Impact

Streamline the customer experience by simplifying
payments and improve positive collections outcomes

Recovery Cases

Recovery from Julia Green-Home Loan

New • 11/13/2024

Case Number	Account Name	Created On	Case Owner	Case Worker	Status	Overdue Am...
RC-005674...	Julia Green	13 Nov, 2024	CredCollect	Justin	New	\$ 2000.00

Physical Recovery

Legal

Closed

Details Activity Related

Upcoming and Overdue

Field agent uploaded the receipt against the payment and updated the status to review

9:00am

CredCollect created a task

Description Amount recover

Case has been assigned to to CredCollect.

9:00am

CredCollect created a task

Description Case assigned to CredCollect based on the location abd status

Workguide

Review payment status and select action

Payment Status

Due Amount Status: **Full Amount Recovered**
Total Due Amount recovered: **\$1000**

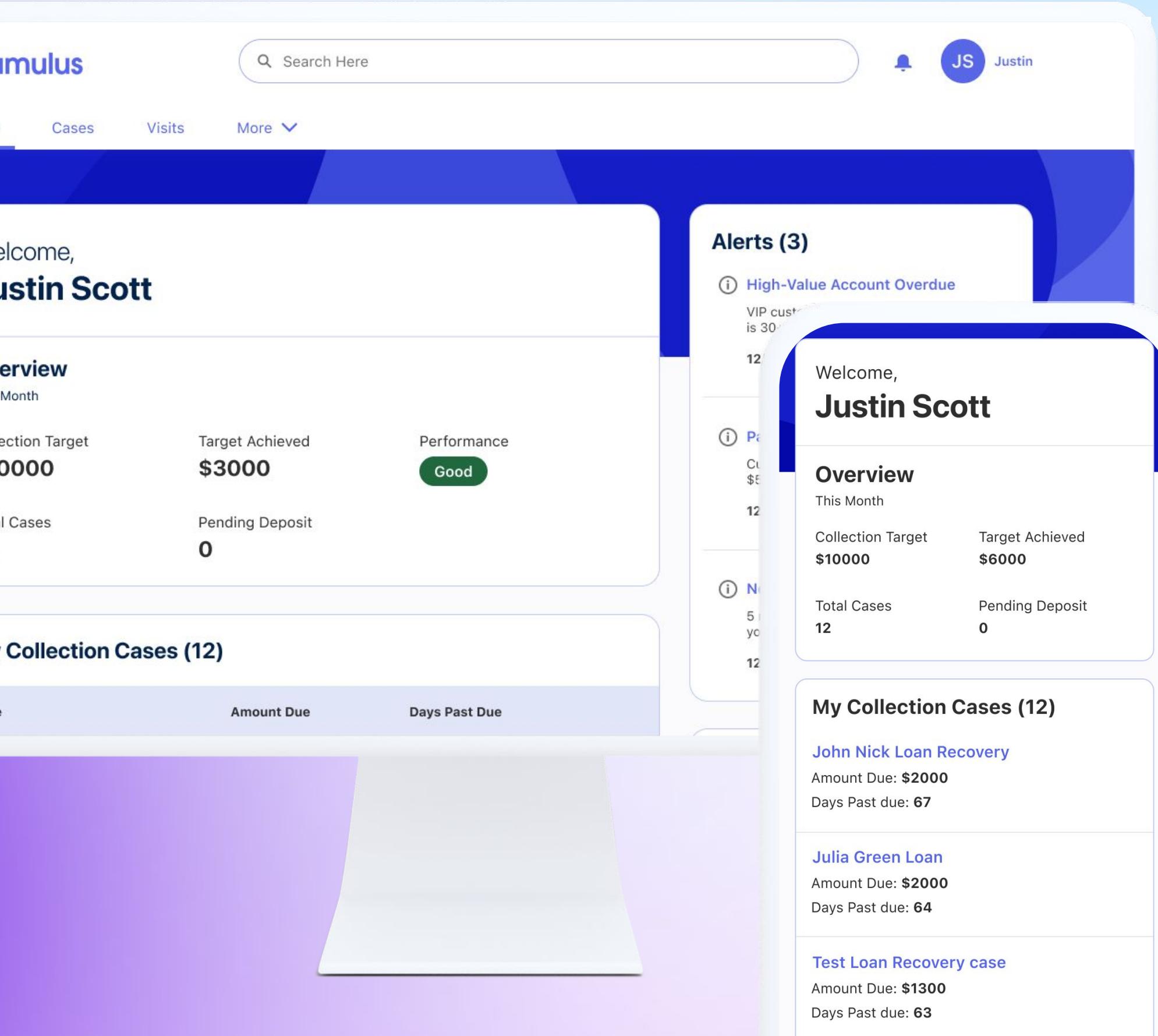
Payment Receipt (1)

Receipt	Created On
#200134578244	04/02/2024

Select Action

Approve
 Reject

Collections Recovery Portal



The screenshot shows the Collections Recovery Portal interface. At the top, there is a search bar with the placeholder "Search Here" and a user profile for "Justin". Below the search bar, there are navigation links for "Cases", "Visits", and "More". The main dashboard area features a large blue header with the text "Welcome, Justin Scott". Below this, there is a "Performance" section showing "Target Achieved: \$3000" (Status: Good) and "Pending Deposit: 0". To the right, there is a "Collection Cases (12)" section with columns for "Amount Due" and "Days Past Due". A large callout box highlights the "Alerts (3)" section, which lists "High-Value Account Overdue" and "VIP customer is 30 days past due". The "Overview" section shows "Collection Target: \$10000" and "Target Achieved: \$6000". The "My Collection Cases (12)" section lists three cases: "John Nick Loan Recovery" (Amount Due: \$2000, Days Past due: 67), "Julia Green Loan" (Amount Due: \$2000, Days Past due: 64), and "Test Loan Recovery case" (Amount Due: \$1300, Days Past due: 63).

Pre-configured, shared and centralized platform

For seamless collaboration between lenders and recovery agencies

Easily track recovery progress

Manage accounts, update statuses, and provide reports back to the lender

Improve coordination between lenders and recovery agencies

Reducing manual effort and improving recovery times

Collections Interaction Outcomes



Collections (Pilot) | Collection Plans | CP-000000028 | C...

CP-000000028... | Update ...

Update Collection Plan Status and Create Collection Event and Case

* Collection Status: Active

* Interaction Outcome: Bankruptcy Declared - Verification Pending

Origin: Call

Description: Just spoke to the borrower regarding this Collection. Unfortunately, they stated that they have filed for Bankruptcy (Chapter 11) and expressed inability to repay t
Created a case to Investigate into Bankruptcy - Mr Tate

Create Case

Case Details

* Type: Problem

Priority: High

* Owner: Coll Agent01

Subject: Bankruptcy Verification - Mr Tate

Description:

Instant Account & Fee Transaction Data

Log Collections Interactions in Seconds

Capture key details from overdue account interactions instantly using a new quick action on Collection Plan records.

Easily log outcomes, trigger case creation for legal or recovery steps, and auto-link all activity to the ongoing Collection Plan, ensuring fast response times and seamless documentation.

Agentforce For Financial Services: Loan Product Assistance

Customer-facing Agentforce loan assistance, Equifax integration, & digital lending enhancements

Lori Borg
Financial Services Cloud Senior Product Marketer



Digital Lending Enhancements

Agentforce + Equifax +
Loan Calculator

GA | June 2025

Digital Lending

From point of sale to origination - simplify lending origination on a flexible, customer centered platform



Design profitable lending products and bring them to market quickly on a flexible, connected platform



Deploy modern experiences for Borrowers and Brokers with Agentforce providing loan assistance



Reduce the cycle time and manual process for underwriters to gather information and make decisions



Preconfigured Solutions for Secured and Unsecured Loans

Digital Lending Enhancements

Coming in June '25

Experience seamless banking with **our modern online platform**.

Personal Loans
Get the funds you need with a personal loan. Use it for anything from medical expenses to debt consolidation.

Student loans
Pay for your education with a student loan. Flexible repayment options and competitive interest rates.

Credit cards
Borrow more credit card to competitive rates.

Agentforce 10:19 AM

Thanks John. As per your credit and financial details available with us, you are pre-qualified for an amount of \$100,000 for a tenure of 1 year, with a fixed interest rate of 8%, subject to a lock-in period of 2 months.

An application fee of \$10 would be required if you proceed for the application. Would you like to proceed with an application?

Agentforce 10:19 AM

Yes No

Yes

Agentforce 10:19 AM

Please proceed [here](#) to complete your application. Feel free to come back to me for any questions you may have.

View Application

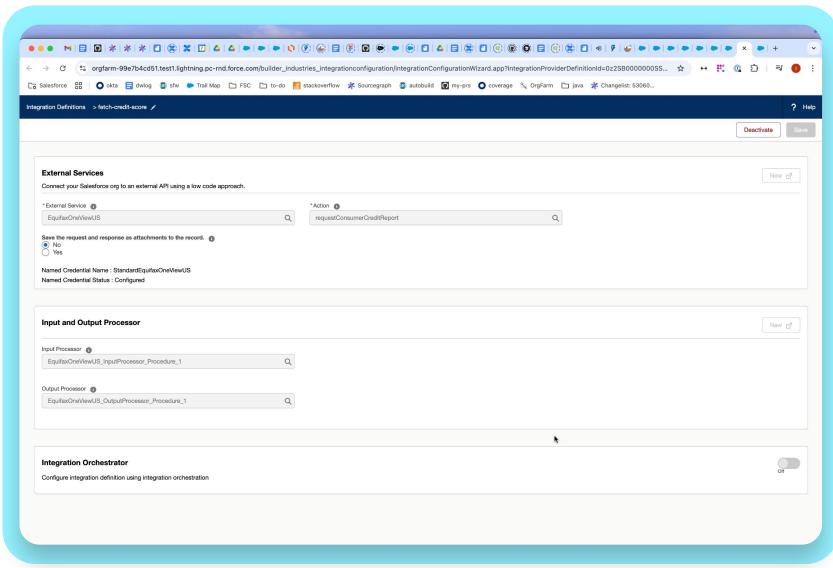
How can I help?

Agentforce Loan Product Assistance

Increase loan volume & efficiency with Agentforce purpose-built for lending. Provide borrowers with loan assistance with loan product discovery and estimated loan amount analysis.

Agentforce Loan Product Assistance

Increase loan volume & efficiency with Agentforce purpose-built for lending. Provide borrowers with loan assistance with loan product discovery and estimated loan amount analysis.



The screenshot shows the Salesforce Integration Configuration Wizard interface. The current step is 'External Services', titled 'Fetch credit score'. The configuration details are as follows:

- External Service:** EquifaxOneViewUS
- Action:** requestConsumerCreditReport
- Save the request and response as attachments to the record:** Yes (radio button selected)
- Named Credential Name:** StandardEquifaxOneViewUS
- Named Credential Status:** Configured

Input and Output Processor:

- Input Processor:** EquifaxOneViewUS_InputProcessor_Procedure_1
- Output Processor:** EquifaxOneViewUS_OutputProcessor_Procedure_1

Integration Orchestrator: Configuration status is off.

Equifax Integration

Drive efficiency by embedding real-time Equifax credit scores directly into your workflows for streamlined decision-making.

Equifax Integration

Drive efficiency by embedding real-time Equifax credit scores directly into your workflows for streamlined decision-making.

Loan Calculator

Estimate your loan payments.

*Step-Up repayment is a loan repayment method where the payments start lower and gradually increase at specified intervals over the loan term.

• Repayment Type

StepUp

• Loan Amount
\$50,000.00

• Loan Term
24 Years Months

• Interest Rate
8% Start Date (yyyy-MM-dd)
2025-04-10

• Step-Up Interval
Quarterly Incremental Factor
5

• Additional Payment
 Reduce Loan Term Reduce EMI

Recurring Payments

Amount
\$1,000.00 Frequency
Quarterly

Start Date (yyyy-MM-dd)
2025-04-17 Number of Payments
5

Single Payment
Amount
Date (yyyy-MM-dd)

Calculations for single or recurring payments are approximate and subject to change.

Repayment and additional payment both happen in the EMI cycle in which they fall as per the specified input date. This calculation assumes that the interest shall be charged for that particular EMI cycle.

Starting monthly payment before first Step-Up*

\$2,261.36

*EMI will change Quarterly at 8% due to Step-Up

Total Loan View

\$53,585.73

Principal	Interest	Total Additional Payments
\$41,000.00	\$3,585.73	\$9,000.00

Loan Maturity Date (yyyy-MM-dd): 2027-03-10

You will save a total of 287.72 on your loan due to additional payments. To view the details on reduced EMI and tenure view the repayment schedule below.

Loan Calculator Enhancements

Enable borrowers to understand the impact of one-time and recurring payments and help them determine affordability of loans.

Loan Calculator Enhancements

Enable borrowers to understand the impact of one-time and recurring payments and help them determine affordability of loans.

Digital Lending Innovation

Loan Product Assistance

AI Agents with Loan Expertise

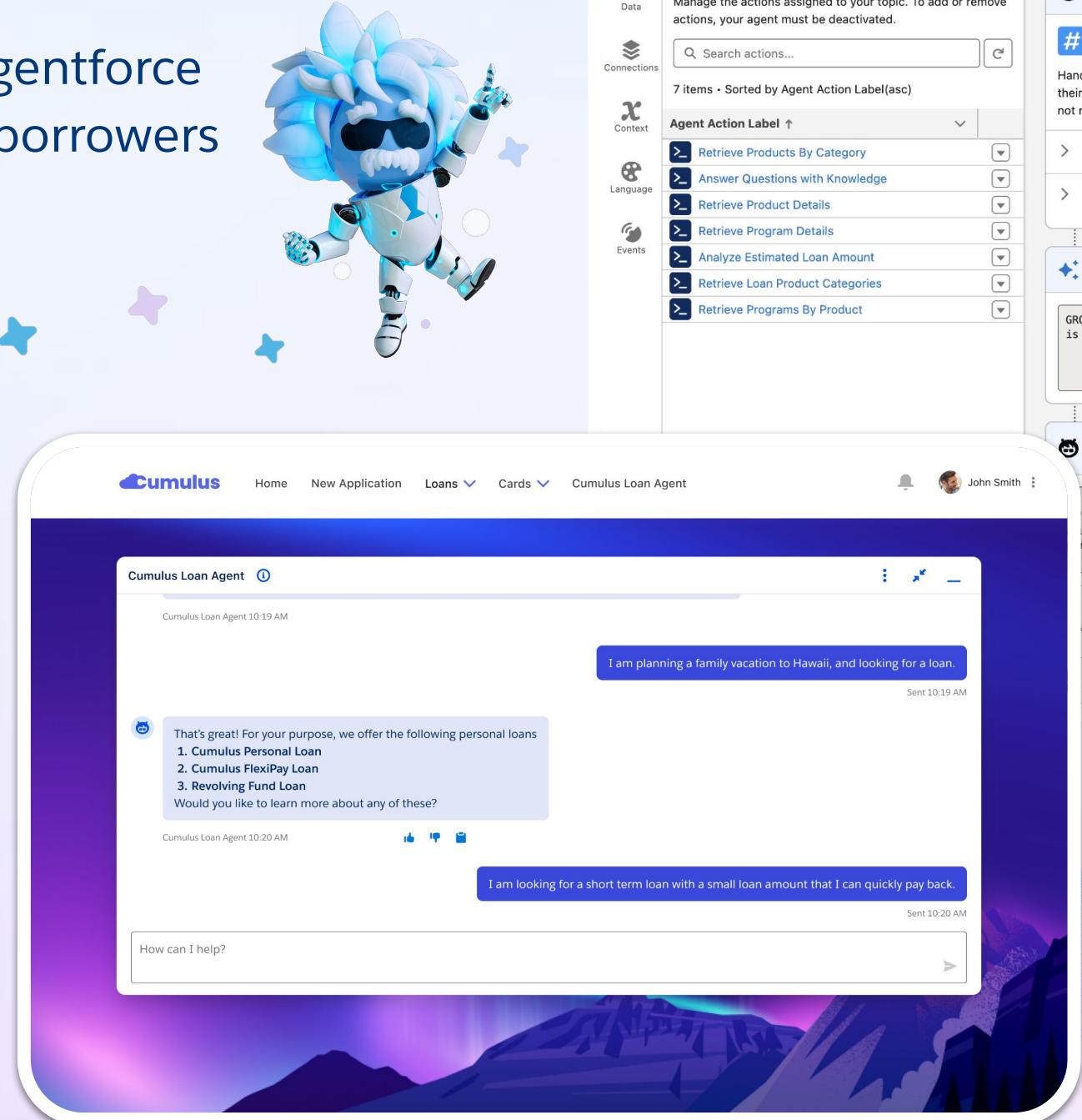
Automate routine loan inquiries with Agentforce powered by prebuilt templates to help borrowers identify the right loan products

Empower Borrowers

Provide instant access to information about loan options and estimated loan amounts, issuing more loans with less human intervention

Use Pre-Built Templates

Launch Agents in minutes with templates in Financial Services Cloud and customize fast with clicks not code



Topic Details

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Search actions...

7 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑

- Retrieve Products By Category
- Answer Questions with Knowledge
- Retrieve Product Details
- Retrieve Program Details
- Analyze Estimated Loan Amount
- Retrieve Loan Product Categories
- Retrieve Programs By Product

Select Topic

Lending Product Discovery (LendingProductDiscovery)

Handles customer enquiries about available loan products, addressing questions on loan categories, products and their respective program details. Marks any question not related to lending product discovery as off-topic and does not respond to it. Handles only the products related to lending or loans.

Instructions 10

Actions 7

Reasoning

GROUNDED: The response correctly asks the user to specify the parameters for comparison, which is grounded in the context provided.

Agent Response

message: "Sure! To compare the personal loan products, please specify the parameters you would like to compare. Here are some options:\n1. Interest Rates\n2. Fees\n3. Terms\nWhich parameters would you like to compare?"

Plan ID: cd37b4d2f44b

User Prompt

Describe your task or ask a question...

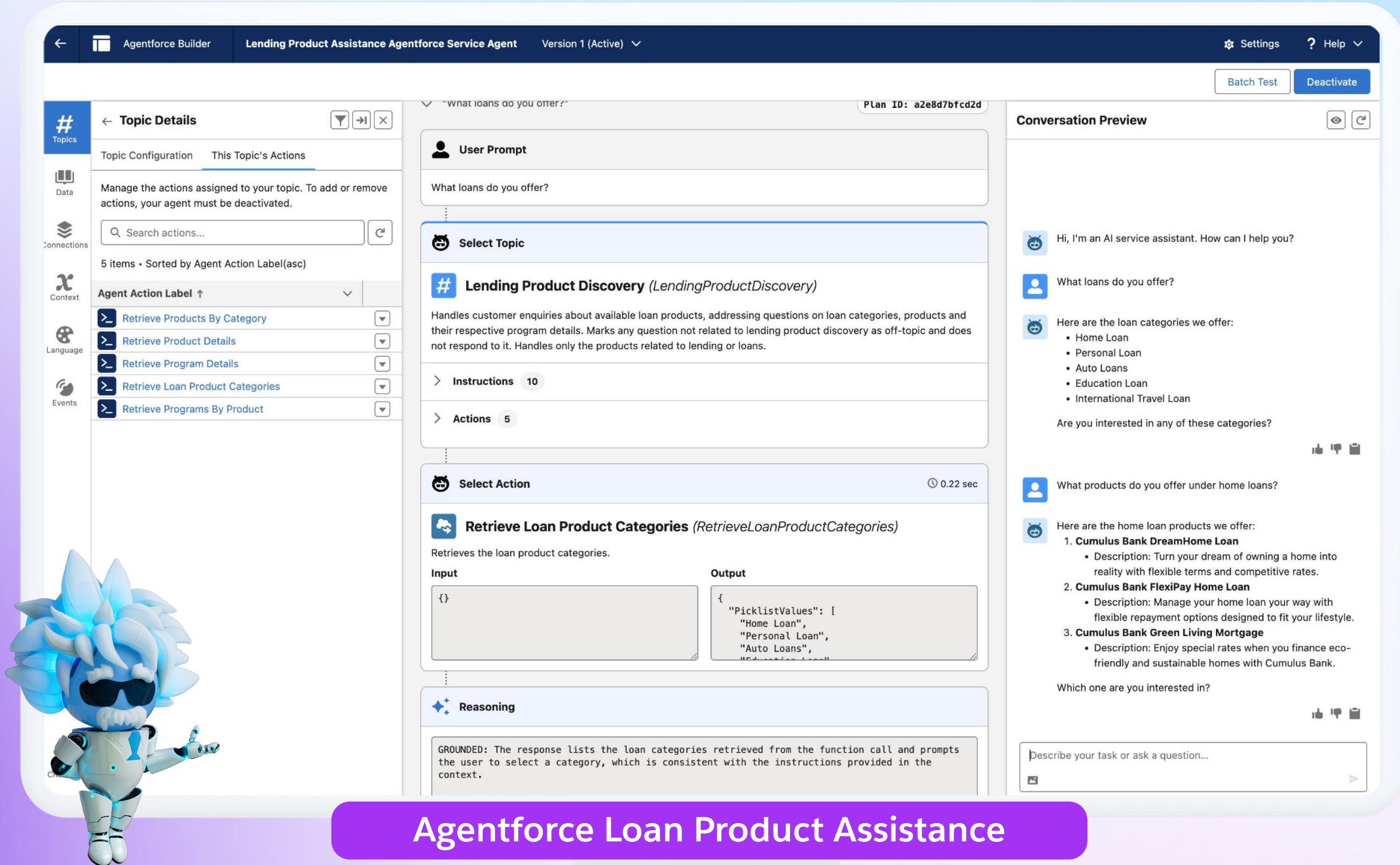
salesforce

Loan Product Assistance Agent In Action



Action: Retrieve Loan Product Categories

salesforce



The screenshot shows the Agentforce Builder interface for a topic named "Lending Product Assistance". The "This Topic's Actions" tab is selected. A user prompt "What loans do you offer?" is displayed. The "Select Topic" section shows "Lending Product Discovery (LendingProductDiscovery)" selected. The "Select Action" section shows "Retrieve Loan Product Categories (RetrieveLoanProductCategories)" selected. The "Input" field is empty, and the "Output" field shows the following JSON:

```
{ "PicklistValues": [ "Home Loan", "Personal Loan", "Auto Loans", "Education Loan", "International Travel Loan" ] }
```

The "Reasoning" section contains the text: "GROUNDED: The response lists the loan categories retrieved from the function call and prompts the user to select a category, which is consistent with the instructions provided in the context."

Agentforce Loan Product Assistance

Retrieve Loan Product Categories

Retrieves active loan categories

Action: Retrieve Products By Category

salesforce

Agentforce Builder | Lending Product Assistance Agentforce Service Agent | Version 1 (Active) | Plan ID: 840c659845bc | Settings | Help | Batch Test | Deactivate

Topic Details

User Prompt: "What products do you offer under home loans?"

Conversation Preview:

- Hi, I'm an AI service assistant. How can I help you?
- What loans do you offer?
- Here are the loan categories we offer:
 - Home Loan
 - Personal Loan
 - Auto Loans
 - Education Loan
 - International Travel Loan
- Are you interested in any of these categories?
- What products do you offer under home loans?
- Here are the home loan products we offer:
 1. Cumulus Bank DreamHome Loan
 - Description: Turn your dream of owning a home into reality with flexible terms and competitive rates.
 2. Cumulus Bank FlexiPay Home Loan
 - Description: Manage your home loan your way with flexible repayment options designed to fit your lifestyle.
 3. Cumulus Bank Green Living Mortgage
 - Description: Enjoy special rates when you finance eco-friendly and sustainable homes with Cumulus Bank.
- Which one are you interested in?

Describe your task or ask a question...

Topics

Topic Configuration | This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Search actions...

5 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑

- Retrieve Products By Category
- Retrieve Product Details
- Retrieve Program Details
- Retrieve Loan Product Categories
- Retrieve Programs By Product

Connections

Context

Language

Events

Checklist

Agentforce Loan Product Assistance

Retrieve Products By Category

Retrieves a list of active loan products based on the input category.



Action: Retrieve Programs by Product

salesforce

Agentforce Builder | Lending Product Assistance Agentforce Service Agent | Version 1 (Active) | Settings | Help | Batch Test | Deactivate

Topic Details

User Prompt: Tell me about programs under this loan

Plan ID: 7c791ba1990c

Conversation Preview

1. **Cumulus Bank DreamHome Loan**
Description: Turn your dream of owning a home into reality with flexible terms and competitive rates.

2. **Cumulus Bank FlexiPay Home Loan**
Description: Manage your home loan your way with flexible repayment options designed to fit your lifestyle.

3. **Cumulus Bank Green Living Mortgage**
Description: Enjoy special rates when you finance eco-friendly and sustainable homes with Cumulus Bank.

Which one are you interested in?

Tell me more about the DreamHome Loan

Here are the details for the **Cumulus Bank DreamHome Loan**:
• Description: Turn your dream of owning a home into reality with flexible terms and competitive rates.
• Origination Fee: \$1,500
• Closing Fee: \$700
• List Rate: 8.5%
• Term: Six month lock-in period

Would you like to proceed with the pre-qualification?

Tell me about programs under this loan

The **Cumulus Bank DreamHome Loan Program** is available under the DreamHome Loan. Here are the details:
• Program Name: Cumulus Bank DreamHome Loan Program
• Is Active: Yes

Would you like to proceed with the pre-qualification for this program?

Describe your task or ask a question...

Agent Action Label ↑

Agent Action Label ↑

Retrieve Products By Category

Retrieve Product Details

Retrieve Program Details

Retrieve Loan Product Categories

Retrieve Programs By Product

Select Topic

Lending Product Discovery (LendingProductDiscovery)
Handles customer enquiries about available loan products, addressing questions on loan categories, products and their respective program details. Marks any question not related to lending product discovery as off-topic and does not respond to it. Handles only the products related to lending or loans.

Instructions 10

Actions 5

Select Action

Retrieve Programs By Product (RetrieveProgramsByProduct)
This action retrieves all programs associated with the specified product.

Input

```
{ "productId": "01tSG000009B3DVYA0" }
```

Output

```
{ "programs": [ { "sObjectInfo": { "apiName": "Program", "id": "01tSG000009B3DVYA0" } } ] }
```

Reasoning

GROUNDED: The response provides details about the Cumulus Bank DreamHome Loan Program, which were retrieved using the function /lendProgDcvr__RetrieveProgramsByProduct.

Agentforce Loan Product Assistance



Retrieve Programs by Product

Retrieves all programs associated with the given product.

Action: Retrieve Program Details

salesforce

Agentforce Builder | Lending Product Assistance Agentforce Service Agent | Version 1 (Active) | Settings | Help

Topic Details | Plan ID: f67a1862cef0

User Prompt: Tell me more about this

Conversation Preview:

Here are the details for the **Cumulus Bank DreamHome Loan**:

- **Description:** Turn your dream of owning a home into reality with flexible terms and competitive rates.
- **Origination Fee:** \$1,500
- **Closing Fee:** \$700
- **List Rate:** 8.5%
- **Term:** Six month lock-in period

Would you like to proceed with the pre-qualification?

Tell me about programs under this loan

The **Cumulus Bank DreamHome Loan Program** is available under the DreamHome Loan. Here are the details:

- **Program Name:** Cumulus Bank DreamHome Loan Program
- **Is Active:** Yes

Would you like to proceed with the pre-qualification for this program?

Tell me more about this

Here are the details for the **Cumulus Bank DreamHome Loan Program**:

- **Origination Fee:** \$1,400
- **Closing Fee:** \$550
- **List Rate:** 7.8%

Agentforce Loan Product Assistance

Retrieve Program Details

Retrieves the program details containing product fee, product list rate and terms.



Action: Retrieve Product Details

salesforce

Agentforce Builder | Lending Product Assistance Agentforce Service Agent | Version 1 (Active) | Settings | Help | Batch Test | Deactivate

Topic Details

Tell me more about the DreamHome Loan

Select Topic

Lending Product Discovery (LendingProductDiscovery)
Handles customer enquiries about available loan products, addressing questions on loan categories, products and their respective program details. Marks any question not related to lending product discovery as off-topic and does not respond to it. Handles only the products related to lending or loans.

Instructions 10 | Actions 5

Select Action

Retrieve Product Details (RetrieveProductDetails)
Retrieves product and its related records such as product fee, product list rate, term related object, and term.

Input: { "productId": "01tSG000009B3DVYA0" }
Output: { "Prompt": "Product: {\nId: 01tSG000009B3DVYA0,\nName: Cumulus Bank DreamHome Loan\\nFamily: Home Loan\\nCode: CUMHOME000,\nDescription: Turn your dream of owning a home into reality with flexible terms and competitive rates." }

Reasoning

GROUNDED: The response accurately reflects the details retrieved from the function call for the product 'Cumulus Bank DreamHome Loan'. Nothing in the response indicates a prompt injection.

Agent Response

{ "message": "Here are the details for the **Cumulus Bank DreamHome Loan**:\\n\\n- **Description**: Turn your dream of owning a home into reality with flexible terms and competitive rates.\\n- **Origination Fee**: \$1,500\\n- **Closing Fee**: \$700\\n- **List Rate**: 8.5%\\n- **Term**: Six month lock-in period" }

Conversation Preview

What loans do you offer?
Here are the loan categories we offer:

- Home Loan
- Personal Loan
- Auto Loans
- Education Loan
- International Travel Loan

Are you interested in any of these categories?

What products do you offer under home loans?
Here are the home loan products we offer:

- Cumulus Bank DreamHome Loan**
 - Description: Turn your dream of owning a home into reality with flexible terms and competitive rates.
- Cumulus Bank FlexiPay Home Loan**
 - Description: Manage your home loan your way with flexible repayment options designed to fit your lifestyle.
- Cumulus Bank Green Living Mortgage**
 - Description: Enjoy special rates when you finance eco-friendly and sustainable homes with Cumulus Bank.

Which one are you interested in?

Tell me more about the DreamHome Loan
Here are the details for the **Cumulus Bank DreamHome Loan**:

- Description:** Turn your dream of owning a home into reality with flexible terms and competitive rates.
- Origination Fee:** \$1,500
- Closing Fee:** \$700
- List Rate:** 8.5%
- Term:** Six month lock-in period

Would you like to proceed with the pre-qualification?

Agentforce Loan Product Assistance

Retrieve Product Details

Retrieves all data for a Product and its related entities, including Product Fee, Product List Rate, Term Related Object, and Term. The data will be returned in JSON format.



Action: Analyze Estimated Loan Amount



Agentforce Loan Product Assistance

Topic Details

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.

Search actions...

7 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑

- Retrieve Products By Category
- Answer Questions with Knowledge
- Retrieve Product Details
- Retrieve Program Details
- Analyze Estimated Loan Amount
- Retrieve Loan Product Categories
- Retrieve Programs By Product

Select Topic

Lending Product Discovery (LendingProductDiscovery)

Handles customer enquiries about available loan products, addressing questions on loan categories, products and their respective program details. Marks any question not related to lending product discovery as off-topic and does not respond to it. Handles only the products related to lending or loans.

Instructions 10

Actions 7

Select Action

24.47 sec

Analyze Estimated Loan Amount (AnalyzeEstimatedLoan...)

Determines the estimated loan amount based on the user's input for monthly payment and loan tenure in months.

Input

```
{ "monthlyPayment": "500000", "loanTenure": "60", "listRate": "8.5" }
```

Output

```
{ "estimatedLoanAmount": 24370591.30657 }
```

Reasoning

GROUNDING: The response is grounded in the function history where the estimated loan amount was calculated based on the user's input. The context also supports the process of estimating the loan amount and providing necessary disclaimers.

Conversation Preview

Would you like to proceed with any other queries or assistance?

What would my loan amount be for this loan?

To estimate the loan amount for the **Cumulus Bank DreamHome Loan**, please provide:

1. Your intended monthly payment.
2. The loan tenure in months.

\$500000 for 5 years

Based on your intended monthly payment of \$500,000 and a loan tenure of 5 years (60 months) with an annual interest rate of 8.5%, the estimated loan amount you can avail is approximately \$24,370,591. Please note that this is a tentative estimate and does not take your credit score into account. The actual loan amount might vary based on your profile. It's recommended to contact the lender for a thorough analysis of your eligibility and affordability.

Would you like to proceed with any other queries or assistance?

No, I'm good, thanks

Thank you for using our service. Have a great day!

Describe your task or ask a question...

Analyze Estimated Loan Amount

Determines the estimated loan amount based on the user's input for monthly payment and loan tenure in months, and the list rate of the product that the borrower is interested in



Digital Lending Equifax Integration

OneView Credit Scoring



Accelerate Implementation

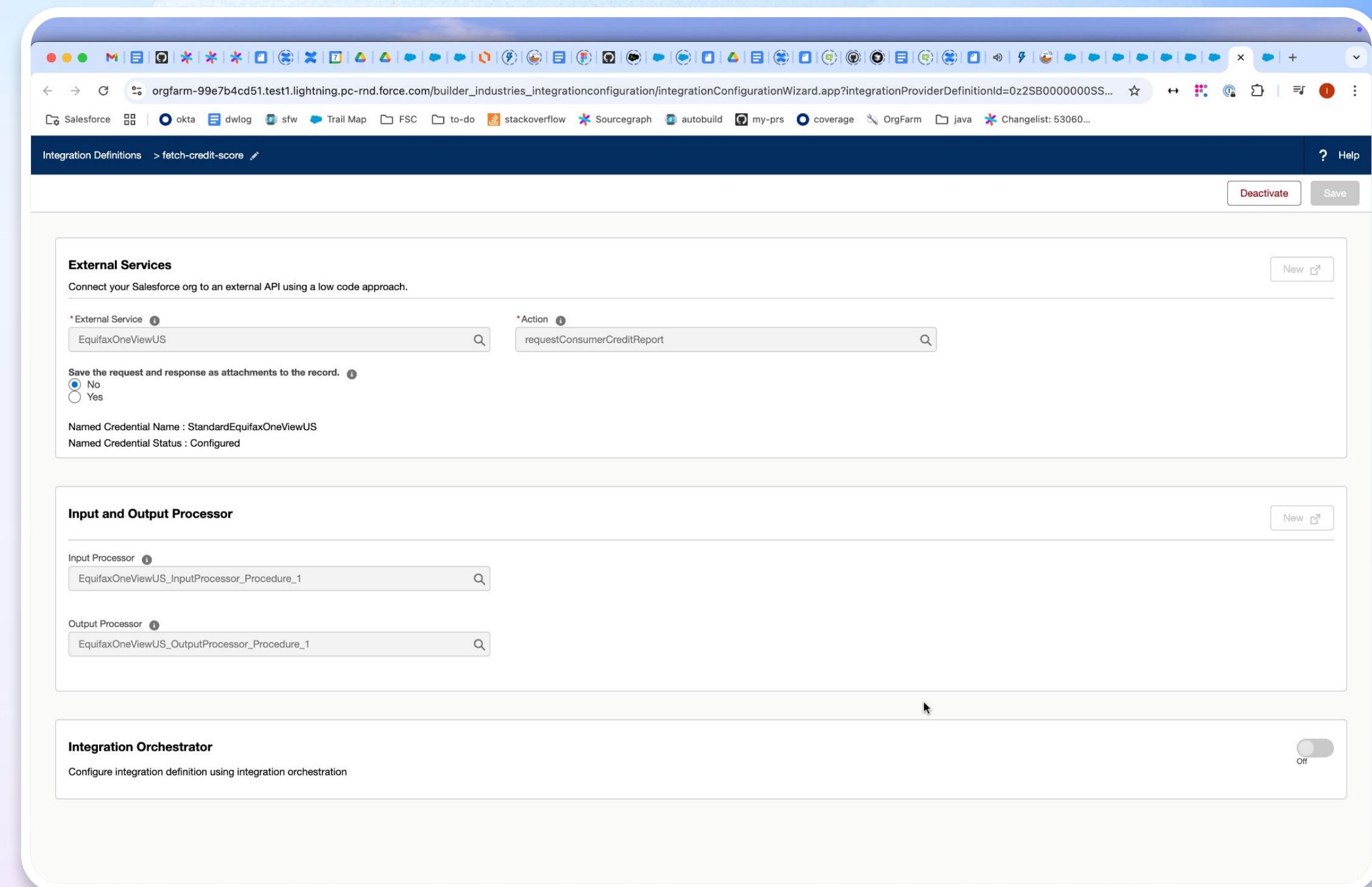
Go live faster with an out-of-the-box integration, eliminating complex setup and manual mapping

Boost Efficiency

Embed real-time Equifax credit scores directly into your workflows for streamlined decision-making

Enhance Customer Experience

Deliver quicker approvals and personalized interactions with seamless credit risk assessment.



Digital Lending Loan Calculator Enhancements

salesforce

Select
repayment type

Calculate one-time or
recurring payments

Loan Calculator

Estimate your loan payments.

*Step-Up repayment is a loan repayment method where the payments start lower and gradually increase at specified intervals over the loan term.

*Repayment Type

StepUp

*Loan Amount
\$50,000.00

*Loan Term
24 Years Months

*Interest Rate
8

*Start Date (yyyy-MM-dd)
2025-04-10

*Step-Up Interval
Quarterly

*Incremental Factor
5

Additional Payment

Reduce Loan Term Reduce EMI

Recurring Payments

Amount
\$1,000.00

Frequency
Quarterly

Start Date (yyyy-MM-dd)
2025-04-17

Number of Payments
5

[Clear](#)

Single Payment

Amount
\$4,000.00

Date (yyyy-MM-dd)
2025-05-02

[Add Payment](#)

[Calculate](#)

Calculations for single or recurring payments are approximate and subject to change.

Repayment and additional payment both happen in the EMI cycle in which they fall as per the specified input date. This calculation assumes that the interest shall be charged for that particular EMI cycle.

Starting monthly payment before first Step-Up*

\$2,261.36

*EMI will change Quarterly at 5% due to Step-Up

Total Loan View

\$53,585.73

Principal	Interest	Total Additional Payments
\$41,000.00	\$3,585.73	\$9,000.00

Loan Maturity Date (yyyy-MM-dd): 2027-03-10

You will save a total of **287.72** on your loan due to additional payments. To view the details on reduced EMI and tenure view the repayment schedule below.

Calculate Repayment Amount

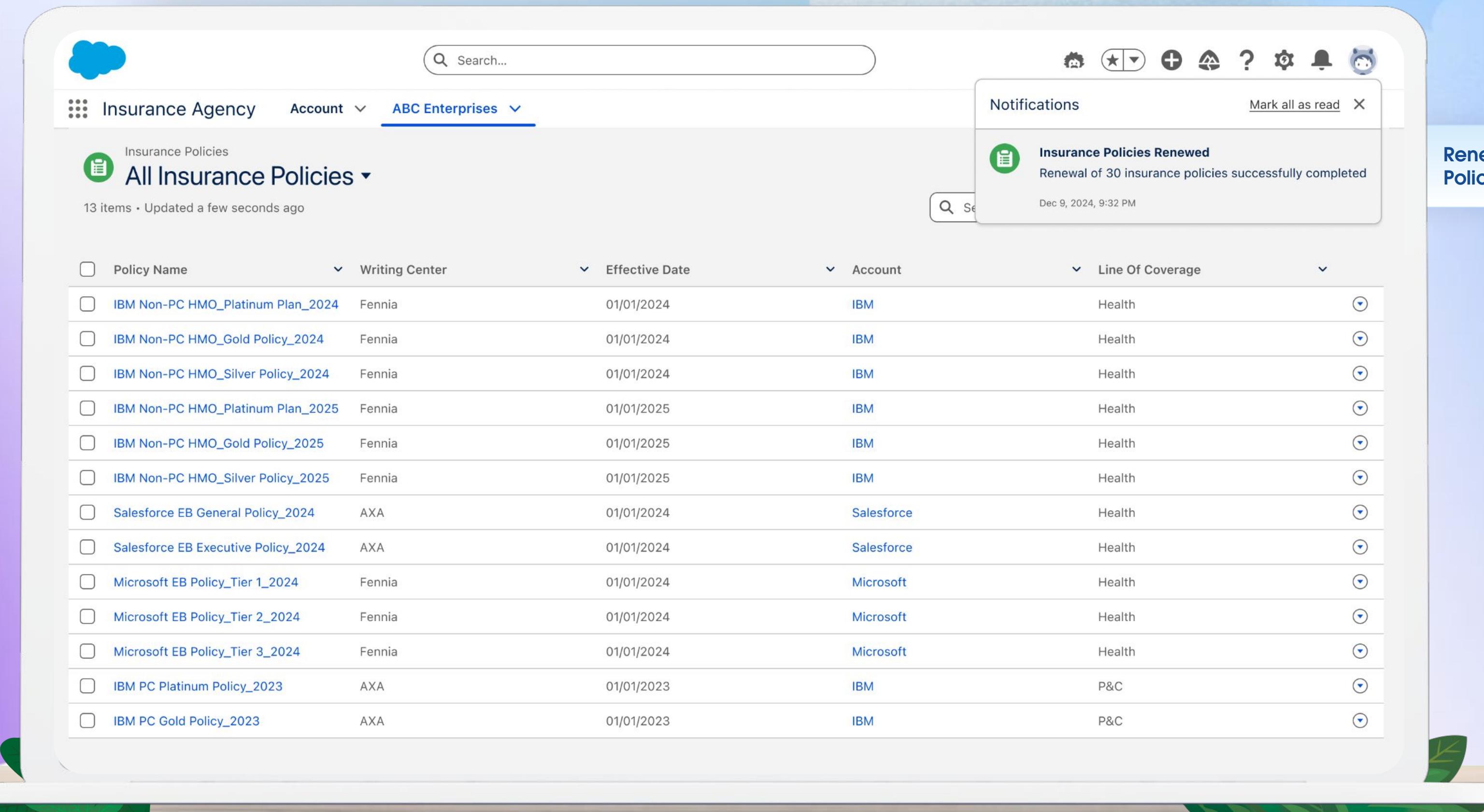
- Determine repayment amount or tenure savings.**
- Schedule prepayments as one-time or a recurring amounts.**
- Provide visibility of payments based on bullet, balloon, step-up, or step-down payment schedules in addition to the regular amortized schedule.**

Insurance Brokerage Enhancements

Commission Split
Enhancements

GA | June 2025

Insurance Brokerage Enhancements



Search... Notifications Mark all as read X

Insurance Agency Account ABC Enterprises

Insurance Policies All Insurance Policies

13 items • Updated a few seconds ago

<input type="checkbox"/> Policy Name	Writing Center	Effective Date	Account	Line Of Coverage
IBM Non-PC HMO_Platinum Plan_2024	Fennia	01/01/2024	IBM	Health
IBM Non-PC HMO_Gold Policy_2024	Fennia	01/01/2024	IBM	Health
IBM Non-PC HMO_Silver Policy_2024	Fennia	01/01/2024	IBM	Health
IBM Non-PC HMO_Platinum Plan_2025	Fennia	01/01/2025	IBM	Health
IBM Non-PC HMO_Gold Policy_2025	Fennia	01/01/2025	IBM	Health
IBM Non-PC HMO_Silver Policy_2025	Fennia	01/01/2025	IBM	Health
Salesforce EB General Policy_2024	AXA	01/01/2024	Salesforce	Health
Salesforce EB Executive Policy_2024	AXA	01/01/2024	Salesforce	Health
Microsoft EB Policy_Tier 1_2024	Fennia	01/01/2024	Microsoft	Health
Microsoft EB Policy_Tier 2_2024	Fennia	01/01/2024	Microsoft	Health
Microsoft EB Policy_Tier 3_2024	Fennia	01/01/2024	Microsoft	Health
IBM PC Platinum Policy_2023	AXA	01/01/2023	IBM	P&C
IBM PC Gold Policy_2023	AXA	01/01/2023	IBM	P&C

Renew and Cancel Policies in Bulk

Insurance Brokerage Enhancements



Indicate where amounts from rounding should be allocated

The screenshot shows the Salesforce Insurance Brokerage interface. A modal window titled "New Producer Split Arrangement Line Item" is open. The "Split Type" is set to "Commission". The "Producer" field contains "House - Sally First Year PSA". The "Split Percentage" field is empty, and the "Flat Currency Amount" field is also empty. A checkbox for "Round Off" is checked, with a note below explaining it removes rounding for other items. The modal has "Cancel", "Save & New", and "Save" buttons at the bottom. The background shows a "Split-Flat-David-Team" record with tabs for "Details" and "Related". A callout bubble points to the "Flat Currency Amount" field with the text "Commission Splits Using Flat Amounts".

Split producer commissions based on percentages or flat amounts

Insurance Brokerage Enhancements



Commission Split Using Flat Amounts - alternate screenshot

The screenshot shows the Salesforce Brokerage interface for a "Producer Split Arrangement" named "Split-Flat-David-Team".

Header: Brokerage, Home, Demo-Split-Flat-David-Team, Search bar, and various icons.

Section 1: Producer Split Arrangement

- Split Arrangement Type:** First Term
- Effective Date:** 1/1/2025
- End Date:** (not specified)

Section 2: Details

Producer Split Arrangement Line Items (4):

Name	Producer	Split Percentage	Split Amount
PSALI-00001	Becky Hickle		USD 500.00
PSALI-00002	Violet Kilback	10%	
PSALI-00003	Jason Renner	70%	
PSALI-00004	House	20%	

Section 3: Activity

Activity Timeline: Upcoming & Overdue. No activities to show. Get started by sending an email, scheduling a task, and more.

Timeline: Refresh, Expand, View All.

Section 4: Footer

Commission Splits Using Flat Amounts