



# Financial Services Cloud Summer '25 Release

PMM Overview



# Release Scope

Summer '25 Release

salesforce

## Agentforce

[Financial Advisor Assistance](#)

[Banking Relationship Assistance](#)

[Banking Service Assistance](#)

[Insurance Service Assistance](#)

[Collections Assistance](#)

[Loan Product Assistance](#)

## Additional Innovation

[Wealth Management Product Enhancements](#)

[Digital Insurance Product Enhancements](#)

[Collections Product Enhancements](#)

[Digital Lending Product Enhancements](#)

[Insurance Brokerage Product Enhancements](#)





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



# Agentforce for Financial Services

salesforce

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

GA | June

Financial Advisor Assistance

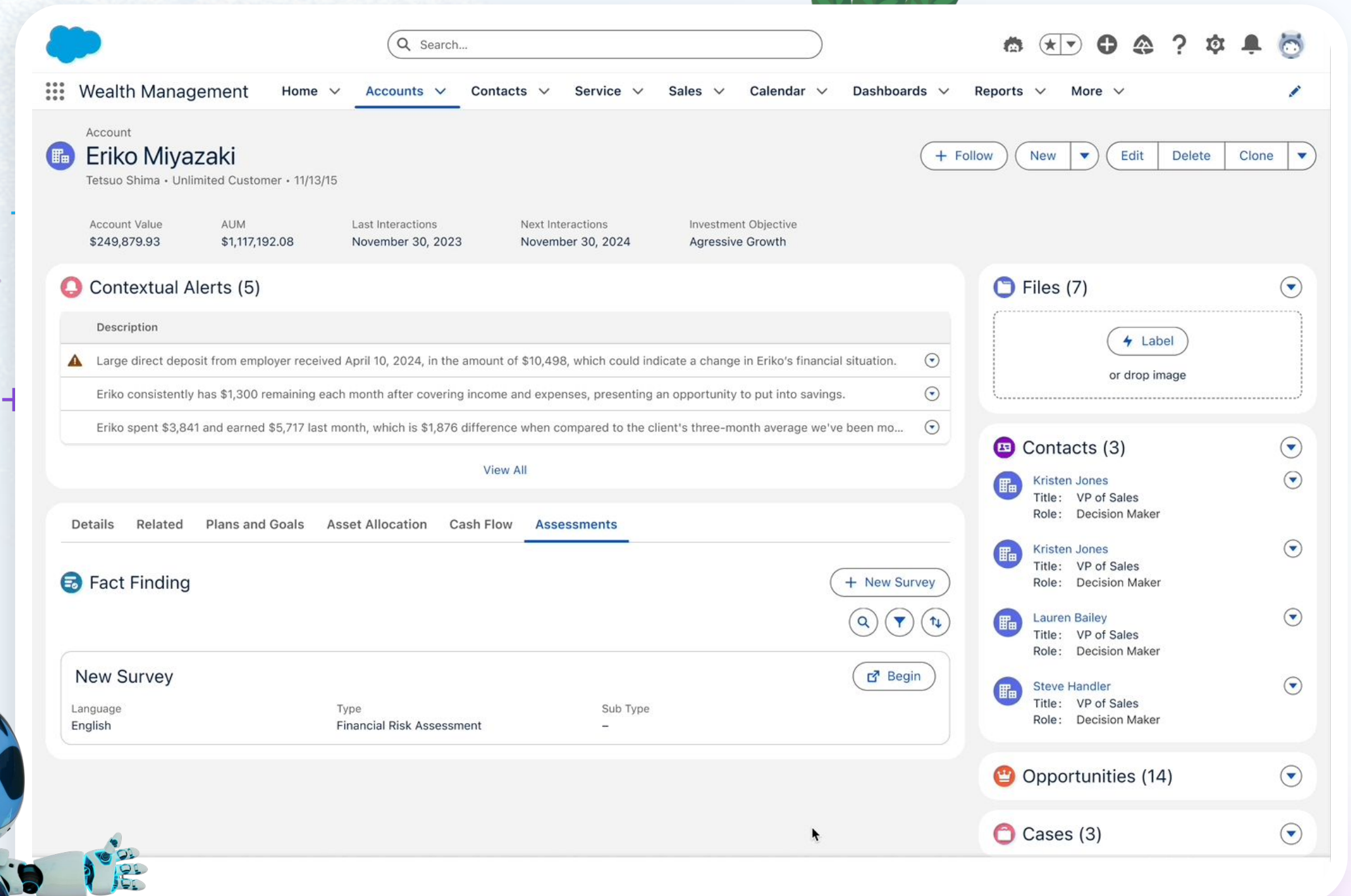
Banking Relationship Assistance

Banking Service Assistance

Insurance Service Assistance

Collections Assistance

Loan Product Assistance



\*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.



salesforce

# 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

salesforce

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



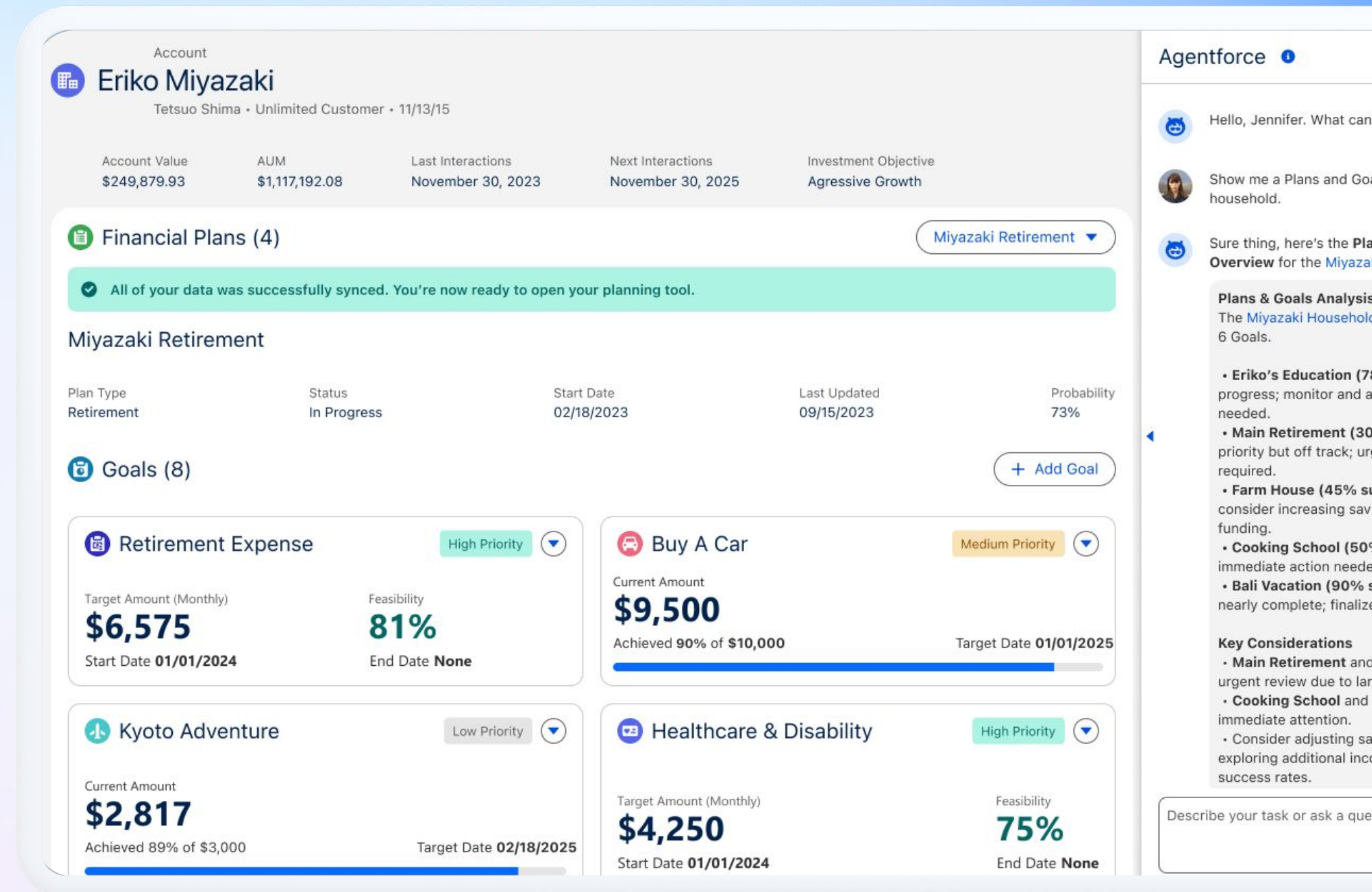
**Improve advisor efficiency and productivity** by automating meeting preparation and streamlining workflows



**Strengthen client relationships** by offering personalised experiences and anywhere anytime support



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

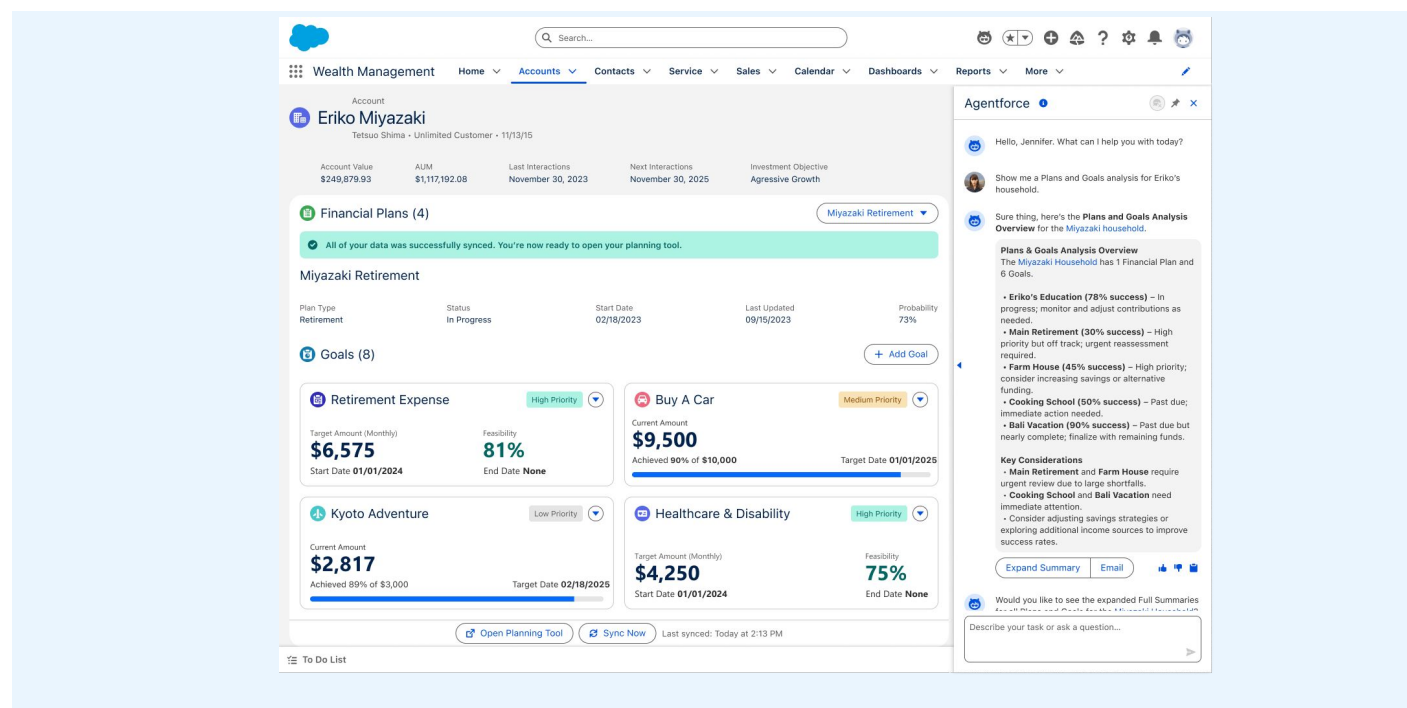


**Easy access to client information and portfolio summary**



# Wealth Management Release

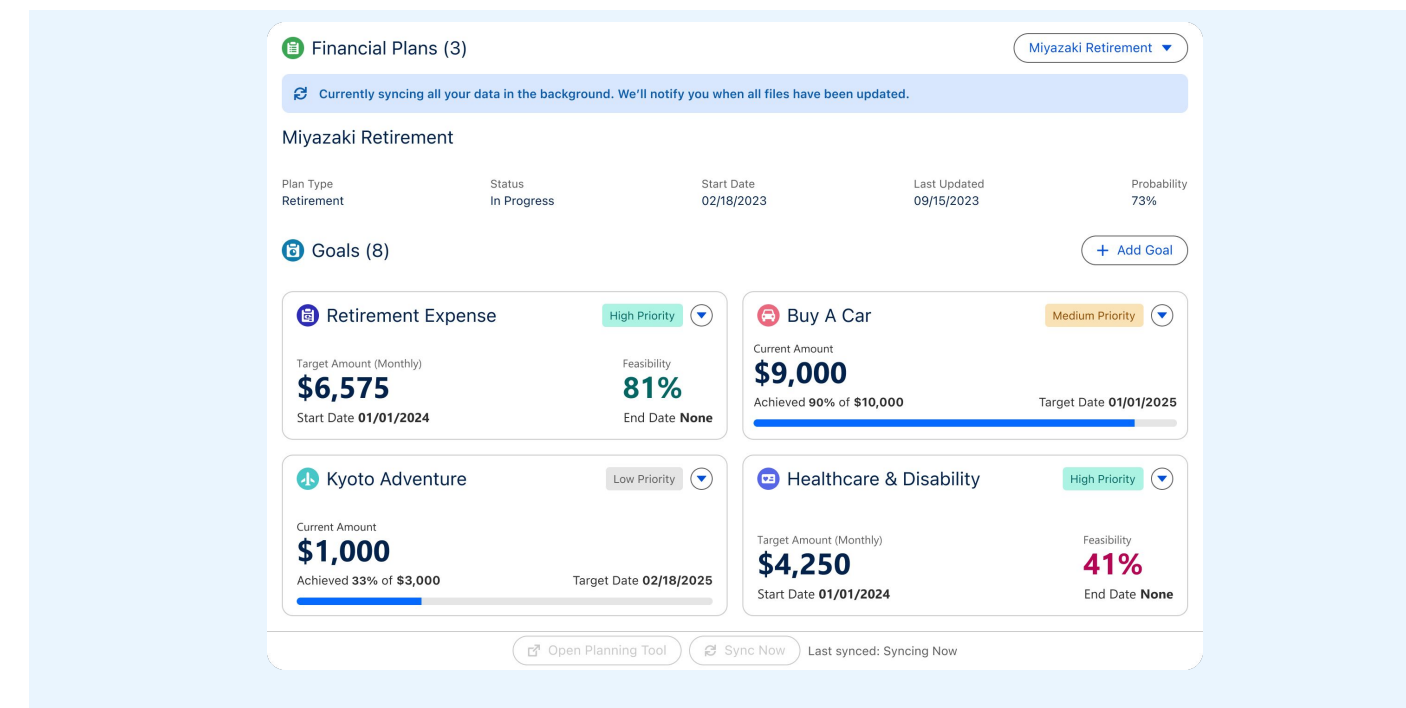
What's new Launching June '25



## 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.



## 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

## 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 for a client named Eriko Miyazaki. The top navigation bar includes a search bar and various utility icons. The main header shows the client's name and account details. Below this, a table provides key financial metrics: Account Value (\$249,879.93), AUM (\$1,117,192.08), Last Interactions (November 30, 2023), Next Interactions (November 30, 2024), and Investment Objective (Aggressive Growth). A section for Contextual Alerts (5) lists recent financial events, such as a large direct deposit. The interface also features a sidebar with lists of Contacts (3), Opportunities (14), and Cases (3). At the bottom, a 'New Survey' section is visible, and a 'To Do List' is shown in the bottom left corner. A small blue robot character is positioned at the bottom center of the interface.



# 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

Wealth Management

Home

Accounts

Contacts

Service

Sales

Calendar

Dashboards

Reports

More

Account

Eriko Miyazaki

Tetsuo Shima • Unlimited Customer • 11/13/15

Account Value

\$249,879.93

AUM

\$1,117,192.08

Last Interactions

November 30, 2023

Next Interactions

November 30, 2025

Investment Objective

Agressive Growth

Financial Plans (4)

All of your data was successfully synced. You're now ready to open your planning tool.

Miyazaki Retirement

Plan Type

Retirement

Status

In Progress

Start Date

02/18/2023

Last Updated

09/15/2023

Goals (8)

Retirement Expense

Target Amount (Monthly)

\$6,575

Start Date 01/01/2024

Feasibility

81%

End Date None

Kyoto Adventure

Current Amount

\$2,817

Achieved 89% of \$3,000

Target Date 02/18/2025

Buy A Car

Current Amount

\$9,500

Achieved 90% of \$10,000

Healthcare & Disability

Target Amount (Monthly)

\$4,250

Start Date 01/01/2024

End Date None

Agentforce

Show me the breakdown of Morris Roaster, LLC financials?

Morris Roasters, LLC is an enterprise account with a single location based in San Francisco, CA. The company operates in the retail industry and has 620 employees. The account is owned by Allen Carter.

Financially, Morris Roasters, LLC has an annual revenue of USD 10,000,000.00 and total investments amounting to USD 5,000,000.00. The company holds total nonfinancial assets worth USD 131,000,000.00 and total bank deposits of USD 3,205,500.00. The total liabilities of the company are USD 6,500,000.00, and the total financial accounts sum up to USD 8,205,500.00.

The account has a "Hot" rating and is privately owned. The KYC date for the account is June 14, 2020. The company has a sum amount in the open pipeline of USD 3,750,000.00. The top opportunities for Morris Roasters, LLC include:

1. Morris Roasters Expansion - Commercial:

Owner: Admin User

Stage: Discovery

Amount: USD 3,750,000.00

Close Date: November 1, 2024

Next Step: Preparing Credit Memo, waiting on business docs from Julie

2. Upstyle, Inc. - Add-On Business - 14K:

Owner: Vince West

Stage: Negotiation

Close Date: April 11, 2024

3. Upstyle, Inc. - Add-On Business - 12K:

Owner: Valerie East

Stage: Proposal/Quote

Close Date: August 9, 2024

4. Upstyle, Inc. - Services - 14K:

Owner: Vince West

Stage: Proposal/Quote

Close Date: August 8, 2024

5. Upstyle, Inc. - New Business - 14K:

Owner: Cindy Central

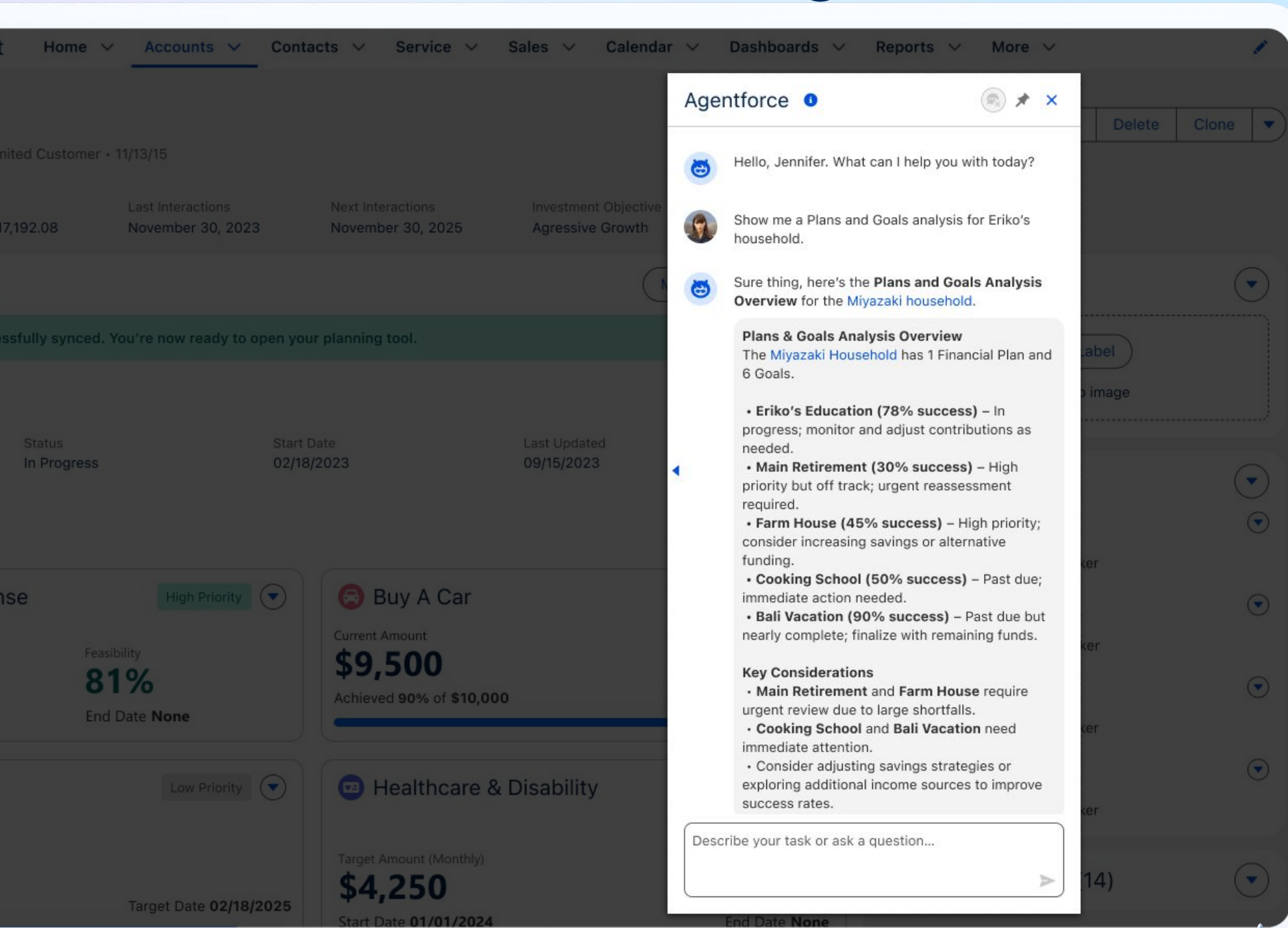
Describe your task or ask a question...

Generate Client & Portfolio Summary





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



## 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

Wealth Management

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Reports

More

Account

Eriko Miyazaki

Tetsuo Shima • Unlimited Customer • 11/13/15

Account Value

AUM

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Next Interactions

Investment Objective

\$249,879.93

\$1,117,192.08

November 30, 2023

November 30, 2025

Agressive Growth

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All of your data was successfully synced. You're now ready to open your planning tool.

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Plan Type

Status

Start Date

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Retirement

In Progress

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09/15/2023

Goals (8)

Retirement Expense

Target Amount (Monthly)

\$6,575

Start Date 01/01/2024

Feasibility

81%

End Date None

High Priority

Buy A Car

Current Amount

\$9,500

Achieved 90% of \$10,000

Kyoto Adventure

Current Amount

\$2,817

Achieved 89% of \$3,000

Target Date 02/18/2025

Low Priority

Healthcare & Disability

Target Amount (Monthly)

\$4,250

Start Date 01/01/2024

End Date None

Agentforce

Great, set this up as an email proposal with a follow-up meeting next week.

Got it. Here's proposal email draft for the Miyazaki Household for your review.

Miyazaki Household

Name

Eriko Miyazaki

Created Date

7/17/2025, 8:47AM

Email [DRAFT] for review

Miyazaki Plans & Goals Analysis

Close Date

8/16/2024

Amount

USD \$7,680

Edit

Send

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

salesforce

## Financial Plans (3)

Miyazaki Retirement ▼

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

High Priority

Target Amount (Monthly)

**\$6,575**

Start Date **01/01/2024**

Feasibility

**81%**

End Date **None**

### Buy A Car

Medium Priority

Current Amount

**\$9,000**

Achieved 90% of \$10,000

Target Date **01/01/2025**

### Kyoto Adventure

Low Priority

Current Amount

**\$1,000**

Achieved 33% of \$3,000

Target Date **02/18/2025**

### Healthcare & Disability

High Priority

Target Amount (Monthly)

**\$4,250**

Start Date **01/01/2024**

Feasibility

**41%**

End Date **None**

Most up-to-date financial data

Third-party Integration

Real time record rollup

Easy access with "Sync Now"

Enhanced Financial Planning Integration



salesforce

# 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



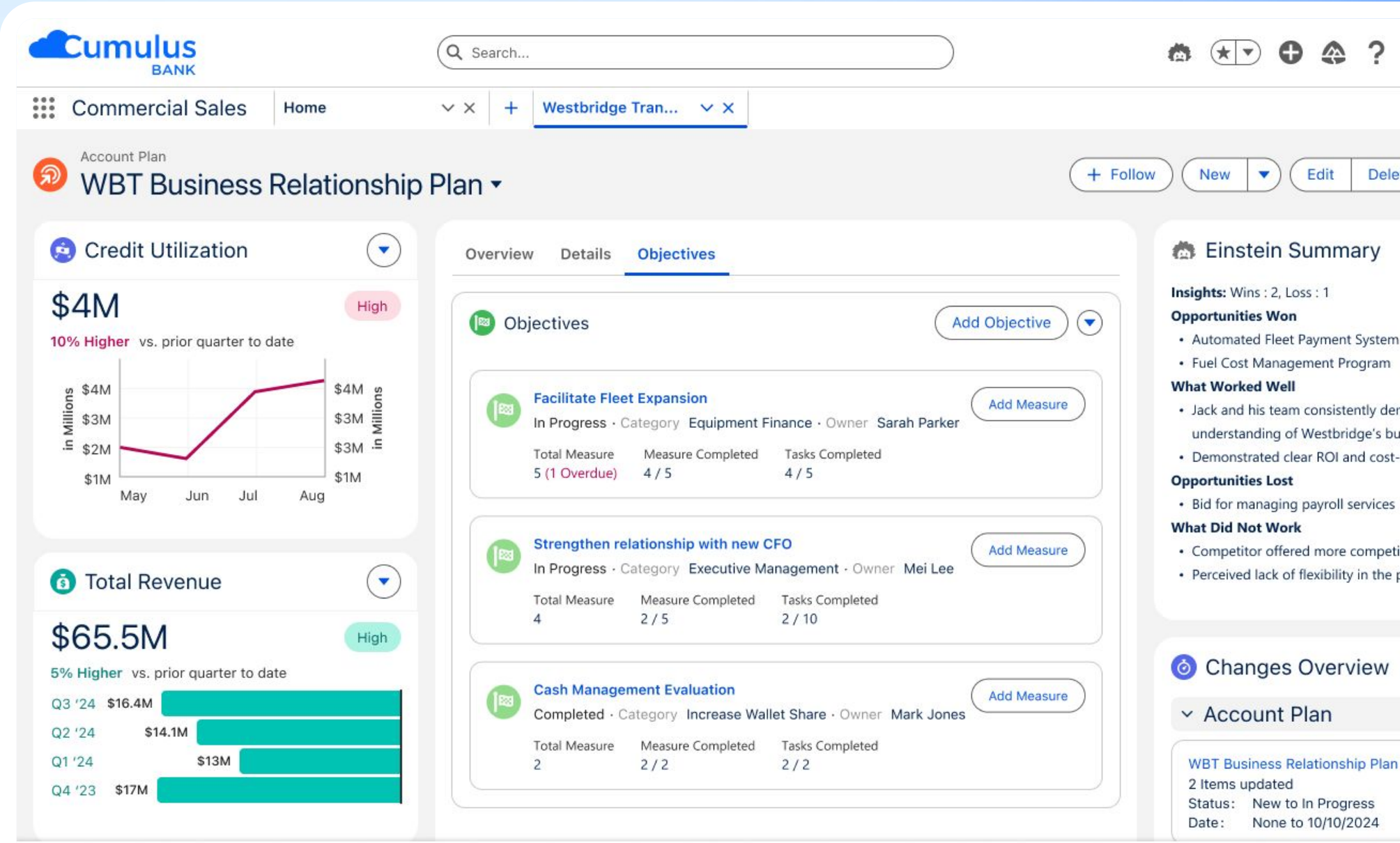
Build more effective sales strategies to boost revenue faster with unified client data and AI



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

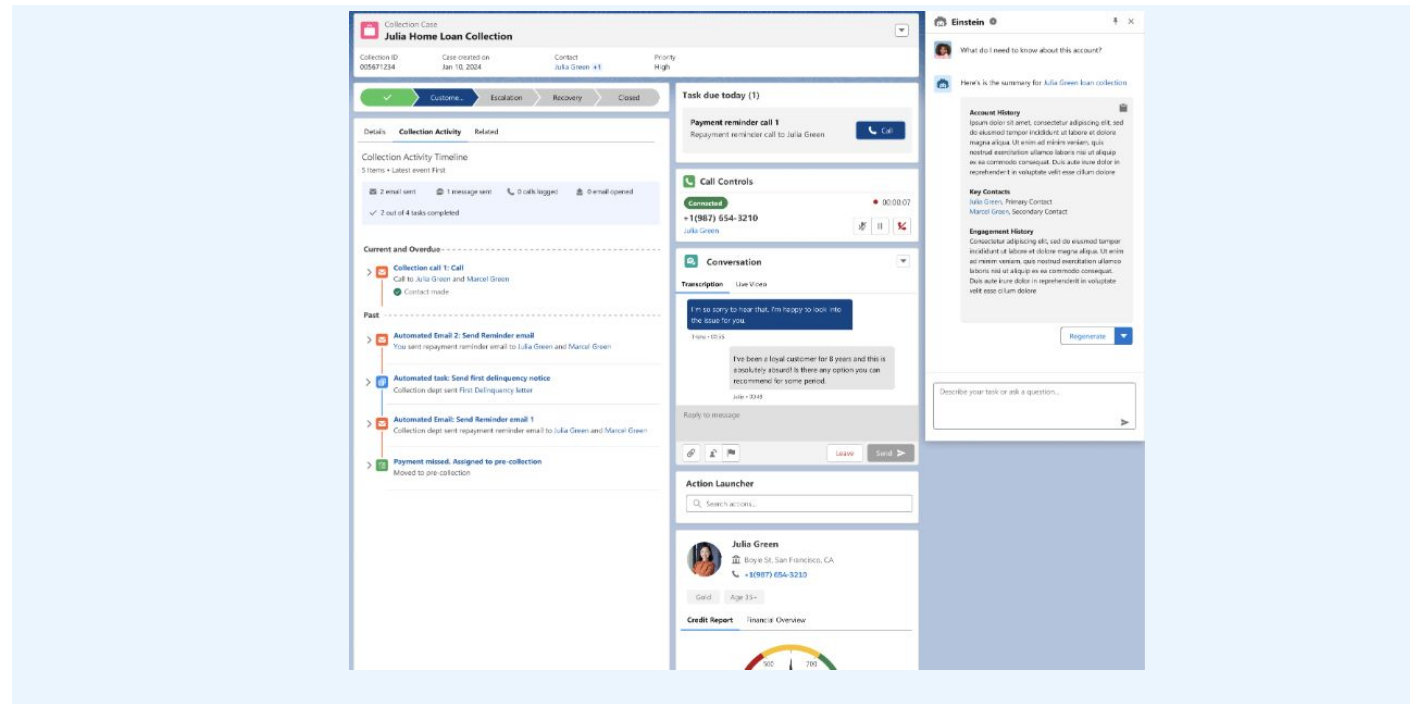


Preconfigured Solutions for Commercial Banking



# 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

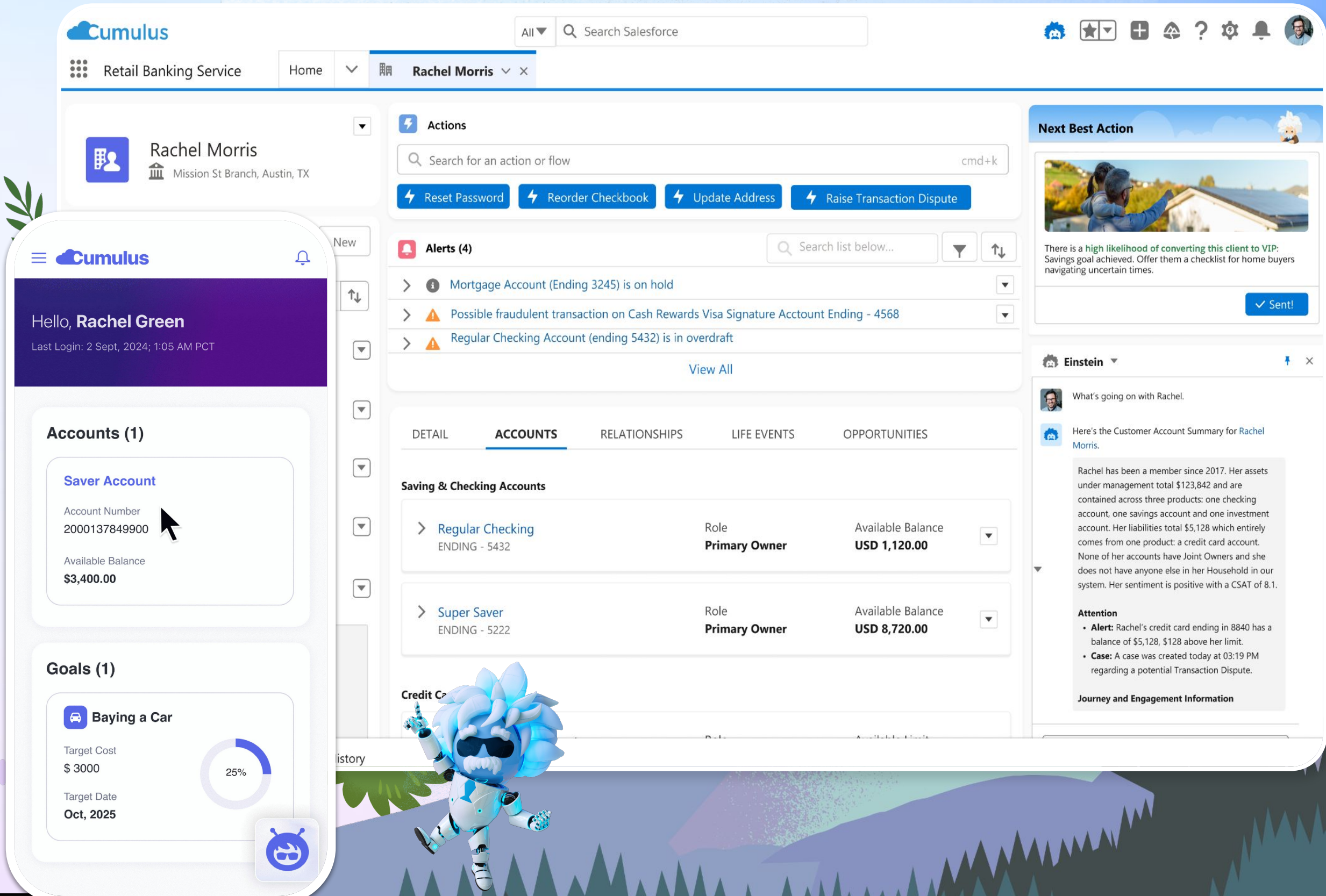
Empower relationship managers to forge deeper client relationships by automating routine tasks so they can focus on driving revenue growth

## Effortless Meeting Prep

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

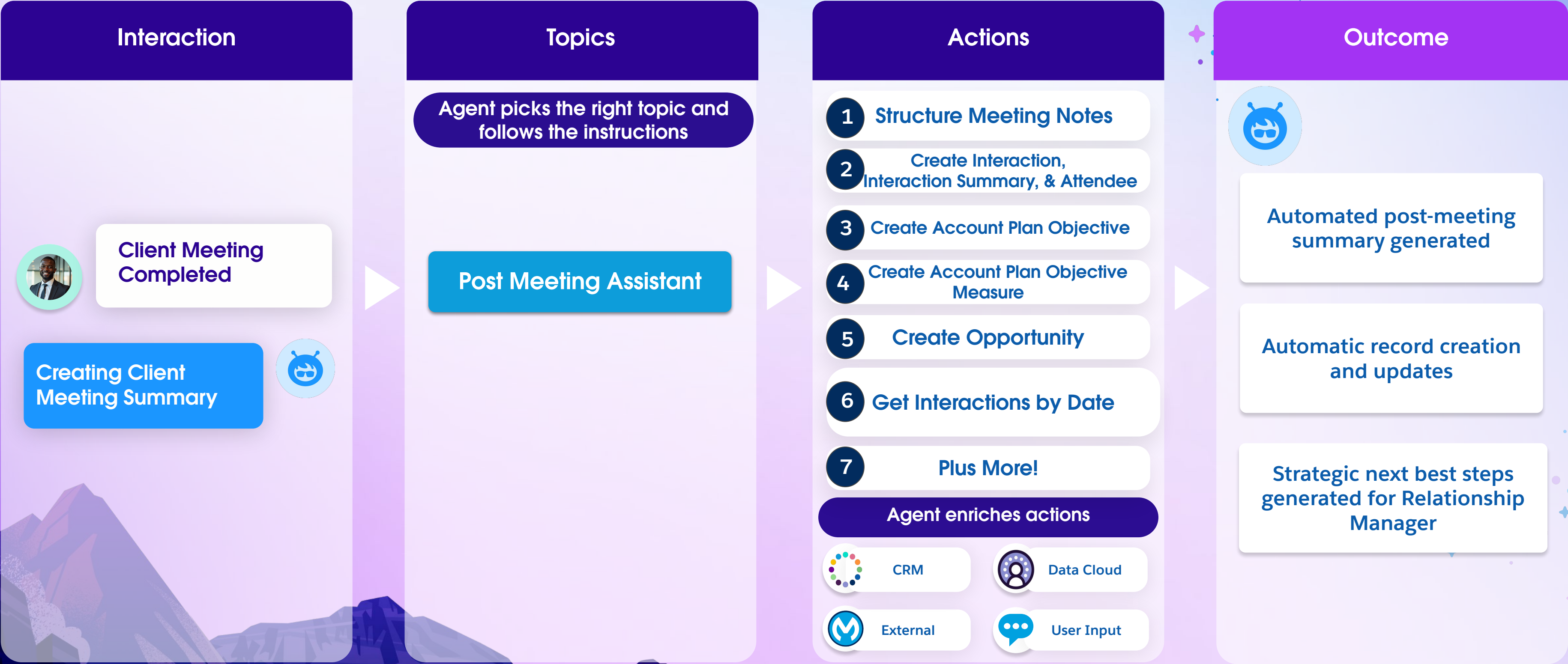
## Pre-Built and Easy to Deploy

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





# Banking Relationship Assistance Agent In Action





# 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.



Force Builder

Relationship Manager Assistant

Version 1 (Active) ▾

Details

Duration

This Topic's Actions

actions assigned to your topic. To add or remove an action, click the plus icon. An agent must be deactivated.

0 actions...

Sorted by Agent Action Label(asc)

Agent Action Label ▴ ▾

Upload for RM Meeting Notes

Unpublished Flow to get Content Document IDs 1

Interaction Summary

Opportunity

Record

Record by Name

Account Plan Objective Measure

Create a To Do

Revise Email

Interactions By Date Range

Interaction

Structure Meeting Notes

Account Plan Objective

Interaction Attendee

Records

Select Action

0.57 sec

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",  "description": "Met with Julie Morris, CEO of Morris Roas..."}
```

Output

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

Select Action

5.07 sec

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 account plan..."}
```

Output

```
{  "taskId": "00Tws0000080DCPMA4",  "resultMessage": "Sure, I created a task record:<br><strong>Subject</strong>: <a href=\"/00Tws0000080DCPMA4\">Add Richard Bennett as a contact</a>..."}
```

Select Action

2.95 sec

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 account plan. Here are the details...

Exp

Account ID: 001Ws00003naGX2IAM Morris Roas

Start Time: 5/14/2025, 5:14 PM

End Time: 5/14/2025, 5:14 PM

Description: Met with Julie Morris, CEO of Morris Roas to discuss expansion plans.

Account Plan: Account Plan for Morris Roas

Sure, I created the account plan. Here are the details...

Subject: Add Richard Bennett as a contact

Task Subject: Add Richard Bennett as a contact

Priority: High

Status: Not Started

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

Sure, I created the account plan. Here are the details...

Subject: Add Richard Bennett as a contact

Task Subject: Add Richard Bennett as a contact

Priority: High

Status: Not Started

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

Describe your task...

## Actionable Meeting Notes & Summaries



# Action: Create Account Plan Objective & Account Plan Objective Measure



Commercial Banking

Home

Acme | Account

Acme

View Edit New Contact

5555

owner  
art John

uring

ress  
Street, Suite 400  
d, IL 62701

Action Launcher

Search actions...

Details Related

Interactions (4)

New

Name	Interaction Type	Start Time	End Time
Meeting with Acme -...		5/8/2025, 8:24 AM	5/8/2025, 8:24 AM
Meeting with Acme		5/8/2025, 8:14 AM	5/8/2025, 8:14 AM
Meeting with Acme		5/8/2025, 8:04 AM	5/8/2025, 8:04 AM
Review of Account Pl...		3/16/2025, 5:00 PM	3/17/2025, 4:59 PM

View All

Interaction Summaries (6+)

New

Title	Interaction	Interaction Purpose	Status
-------	-------------	---------------------	--------

Banking Relationship Assist...

Here are the restructured meeting notes. Are you satisfied with this summary or would you like to regenerate it?

Client Needs & Requests:

- Plans to expand production capacity by 40% over the next 18 months.
- Seeking \$10M in equipment financing and \$3M in working capital.
- Desires flexible repayment options and rate benchmarking.
- Potential interest in sustainability-linked financing.

Challenges & Concerns:

- Need for funding to support expansion plans.

Feedback Received:

- Client is proactive in seeking financing solutions.

Describe your task or ask a question

## 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.

## Measurable Performance





# 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

This Topic's Actions

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

h actions...

Sorted by Agent Action Label(asc)

on Label

Upload for RM Meeting Notes

Unchained Flow to get Content Document IDs

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```

Output

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

Select Action

5.07 sec

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 remainder', 'Add a reminder', 'Create a task', 'Create a to do'

Input

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

Select Action

2.95 sec

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 remainder', 'Add a reminder', 'Create a task', 'Create a to do'

Conversation Preview

I've created the details...

Exp

Account ID

Morris Roas

Start Time

5/14/2025,

End Time

5/14/2025,

Description

Met with Julie Morris, CEO of Morris Roas...

Account Plan

Sure, I created...

Subject: Add

Task Subtype

Priority: High

Status: Not

Description

Operations,

Sure, I created...

Subject: Me

Task Subtype

Priority: High

Status: Not

Description

Describe your task...

## Capture Every Interaction Automatically





# Action: Create Opportunity & Get Interactions by Date

Instant opportunity creation for greater efficiency

salesforce

## Opportunity Creation

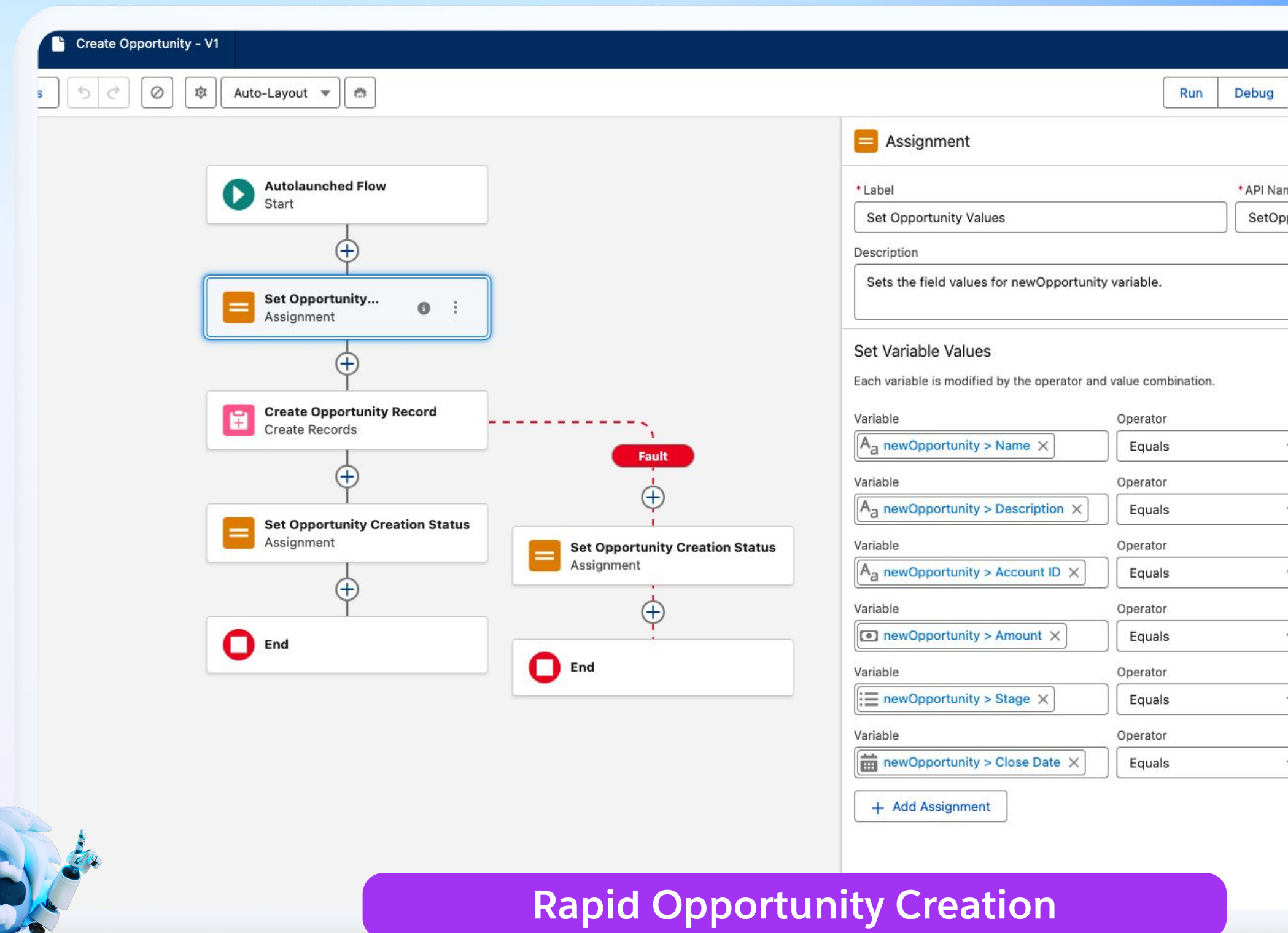
Automatically create a new sales opportunity directly from the account or relationship context.

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





salesforce

# 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

Cumulus

Search Salesforce

Retail Banking Service

Home

Rachel Morris

Rachel Morris

Mission St Branch, Austin, TX

Timeline

Quick Find

Dispute Transaction

February 15, 2024 4:05 PM

Fee Reversal

January 31, 2024 9:23 AM

Marketing Email Mortgage Offer

January 11, 2024 2:55 PM

Branch Interaction

December 01, 2023 10:05 PM

Account Inquiry

October 27, 2023 11:17 AM

Verified

Yes

Duration

00:11:47

On-behalf

Actions

Search for an action or flow

Reset Password

Reorder Checkbook

Update Address

Raise Transaction Dispute

Alerts (4)

Search list below...

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

View All

DETAIL

ACCOUNTS

RELATIONSHIPS

LIFE EVENTS

OPPORTUNITIES

Saving & Checking Accounts

Regular Checking

ENDING - 5432

Role

Primary Owner

Available Balance

USD 1,120.00

Super Saver

ENDING - 5222

Role

Primary Owner

Available Balance

USD 8,720.00

Credit Cards

Next Best Action

There is a high likelihood of converting this client to VIP: Savings goal achieved. Offer them a checklist for home buyers navigating uncertain times.

Sent!

Einstein

What's going on with Rachel.

Here's the Customer Account Summary for Rachel Morris.

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

Omni-Channel (Online)

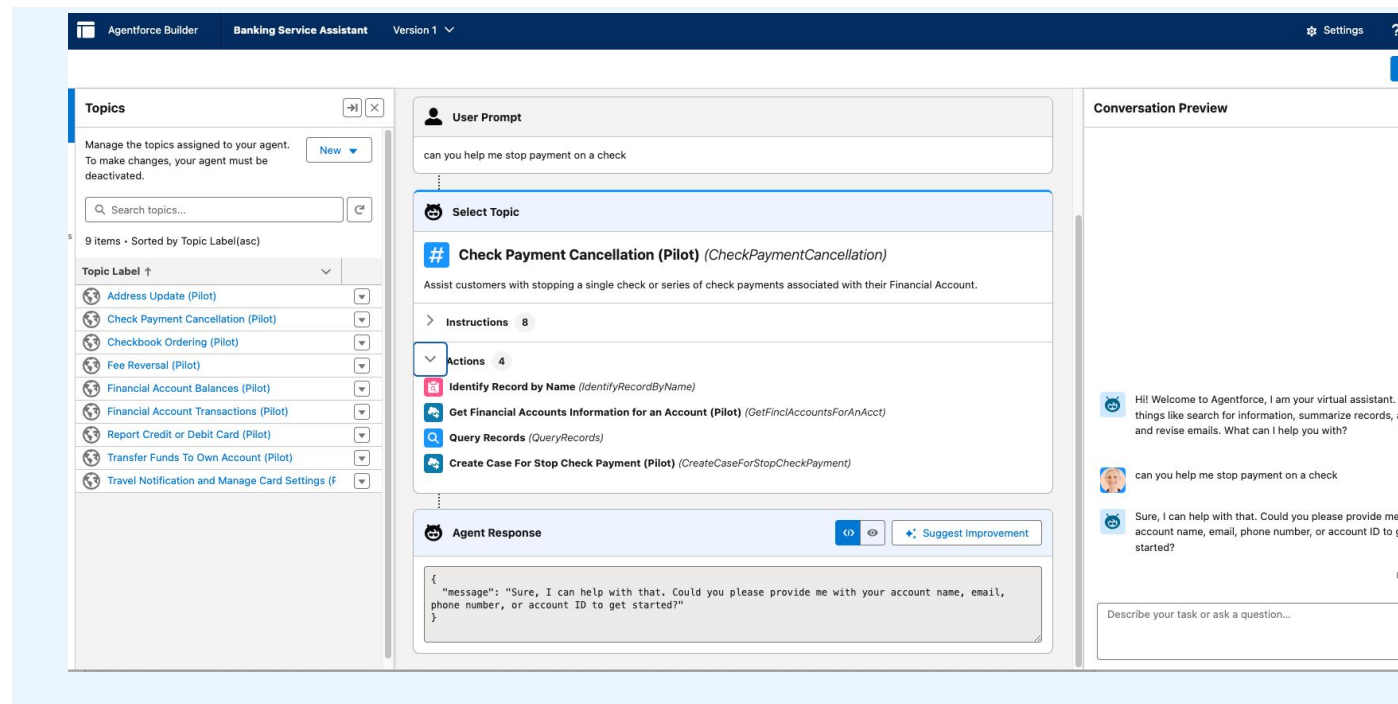
360 Customer View For Customer Single Source of Truth





# FSC For Service Release

What's new Launching June '25



## 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

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

25%

Actions

Search for an action or flow

Reset Password Reorder Checkbook Update Address Raise Transaction Dispute

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

View All

DETAIL ACCOUNTS RELATIONSHIPS LIFE EVENTS OPPORTUNITIES

Saving & Checking Accounts

Regular Checking ENDING - 5432	Role Primary Owner	Available Balance USD 1,120.00
Super Saver ENDING - 5222	Role Primary Owner	Available Balance USD 8,720.00

Credit Ca

Next Best Action

There is a high likelihood of converting this client to VIP: Savings goal achieved. Offer them a checklist for home buyers navigating uncertain times.

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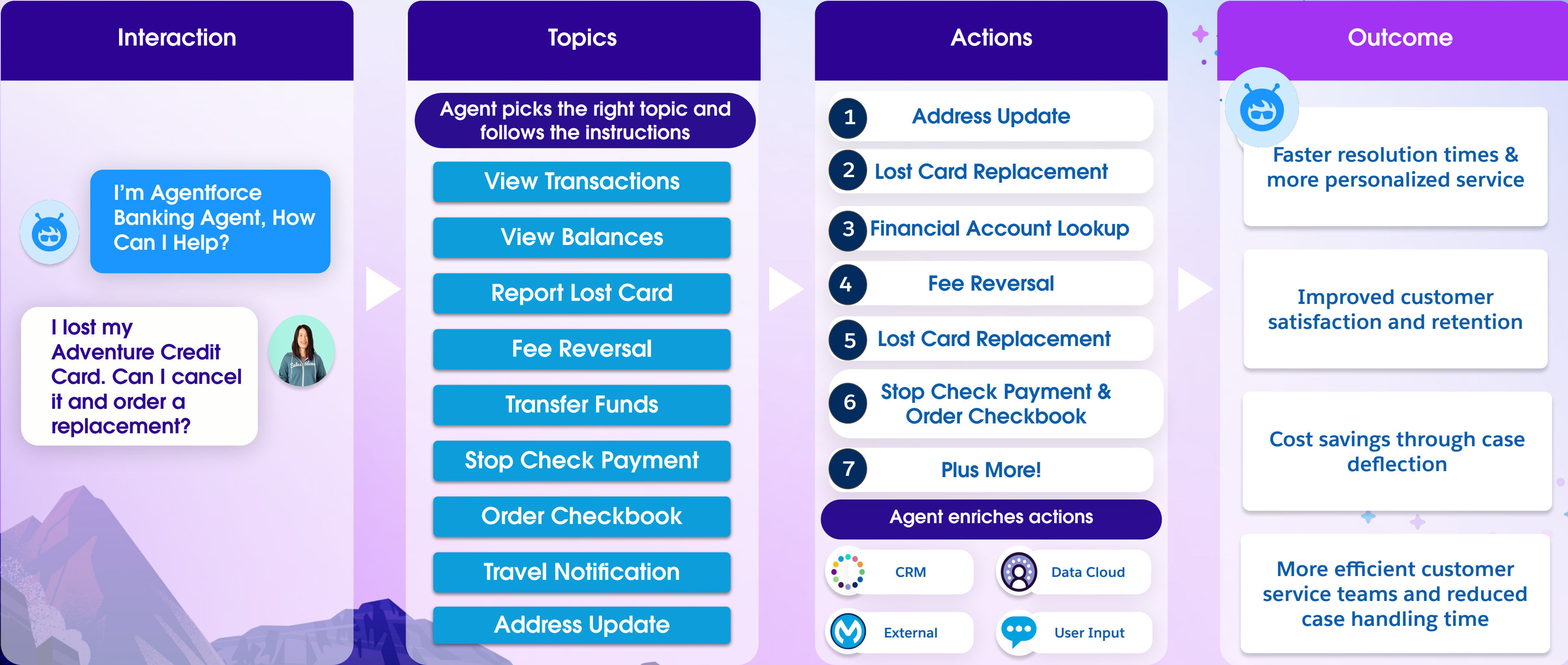
Attention

- Alert: Rachel's credit card ending in 8840 has a balance of \$5,128, \$128 above her limit.
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Journey and Engagement Information



# Banking Service Assistance Agent In Action





# 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.

to your agent.  
it must be

New

bel(asc)

ation (Pilot)

ilot)

ices (Pilot)

actions (Pilot)

Card (Pilot)

Account (Pilot)

Manage Card Settings (F

Banking Service Assistant Version 1

Settings

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 7.28 sec

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 1.21 sec

Conversation Preview

Hi! Welcome to Agentforce, I am your virtual assistant. I can help you with things like search for information, summarize records, 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 94102  
Account ID : 001Ws00003nanU...

☐ Rewards Card - 9954 : Looks like a Visa  
Financial Account ID : a7kWs000...

☐ Stratus Personal Loan - 6985 : Looks like a Loan  
Financial Account ID : a7kWs000...

☐ Stratus Checking - 2390 : 136 Cl...  
Financial Account ID : a7kWs000...

☐ Auto Loan - Standard - 3762 : 13...  
Financial Account ID : a7kWs000...

Submit

Describe your task or ask a question...

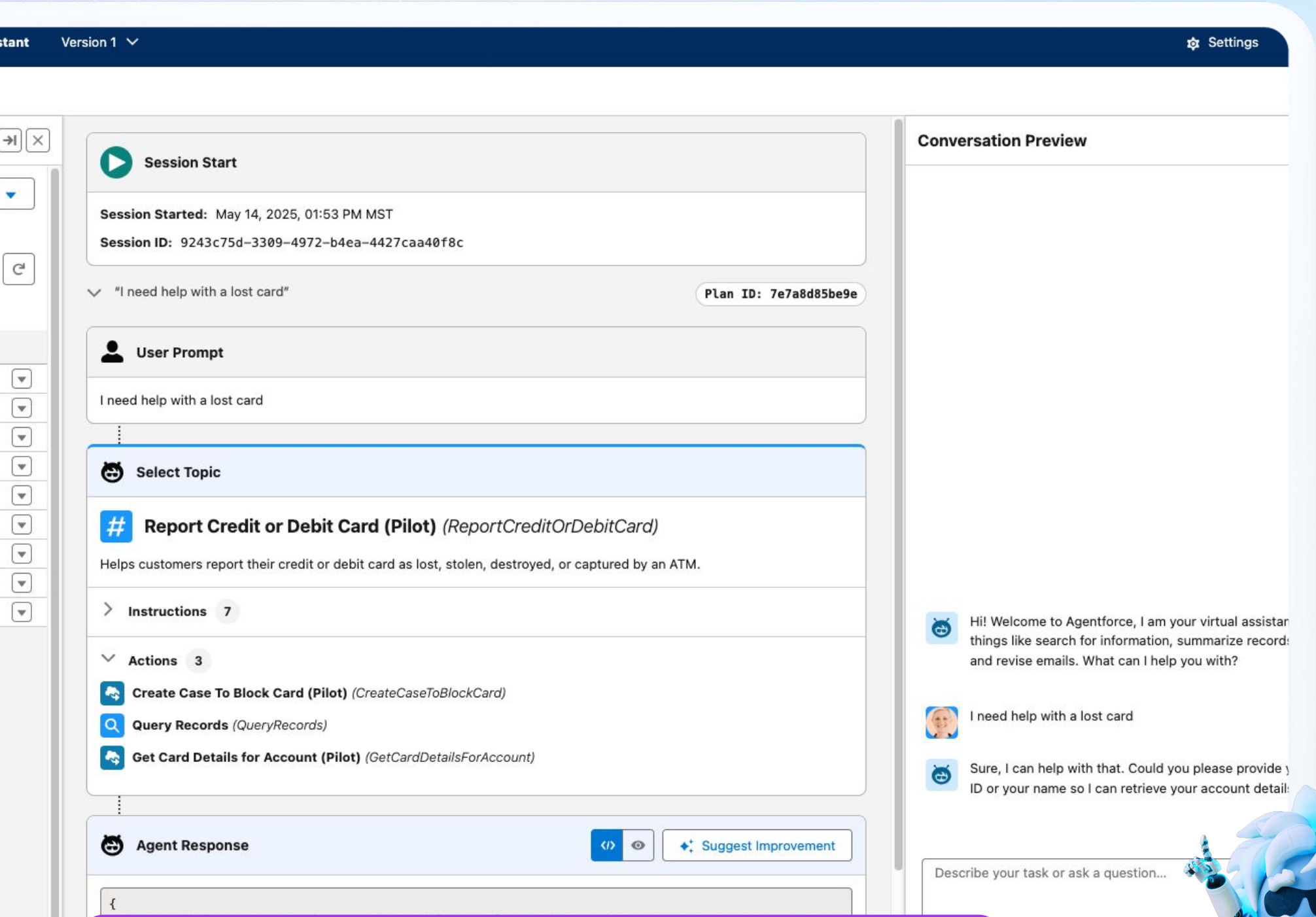
Fast Address Changes





# Action: Create Lost Card Case

Peace of mind and streamlined service team operations



## 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.

Stress Free Lost Card Resolution





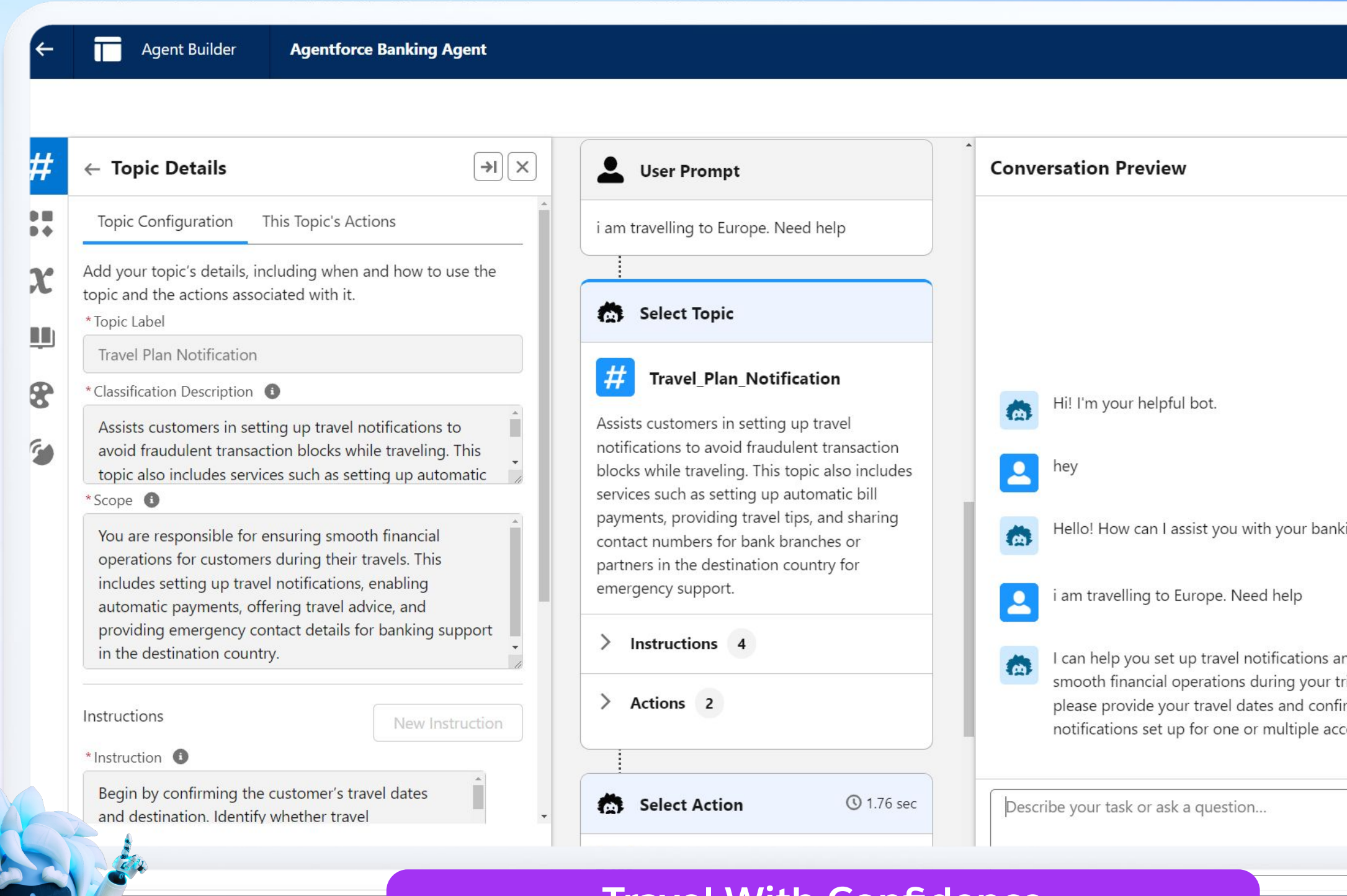
# Action: Create Travel Notification & Update International Use Settings



## 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.



## Travel With Confidence





salesforce



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

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.



Banking Service Assistant

Version 1

Assigned to your agent.  
Our agent must be

New

Topic Label(asc)

(Pilot)

Cancellation (Pilot)

ering (Pilot)

ilot)

nt Balances (Pilot)

nt Transactions (Pilot)

Debit Card (Pilot)

To Own Account (Pilot)

on and Manage Card Settings (F

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) (GetFinclAccountsForAnAcct)

Query Records (QueryRecords)

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

Agent Response

Suggest Improvement

```
{
  "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?"
}
```

Conversation

Hi! We  
things  
and re

can yo

Sure, I  
accoun  
starte

Describe yo

Fast & Error Free Workflows



salesforce

# 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

Search Salesforce

Salesforce Insurance

Home

Opportunities

Policies

Orders

Accounts

More

Insurance Policy

Auto Policy

Policy Number

90295000

Policy Start Date

04/01/2024

Policy End Date

12/31/2024

Total Standard Premium

\$ 750.00

Policy Status

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

Exniration Date

Manage the entire policy lifecycle with ease and efficiency



# Insurance Service Assistance

## AI Agents with Insurance Expertise

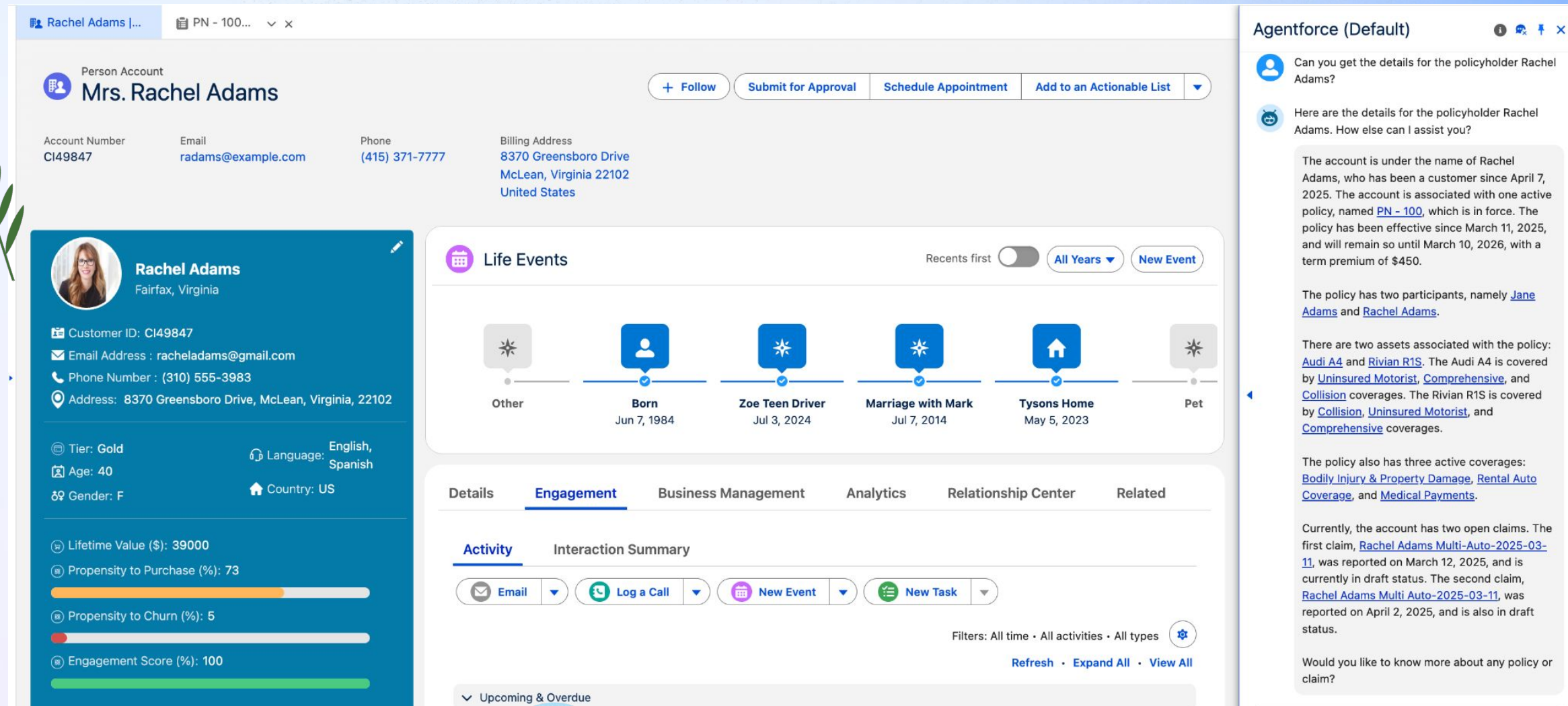
Deliver fast, trusted customer service with Agentforce powered by pre-built insurance workflows and policyholder data

## 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



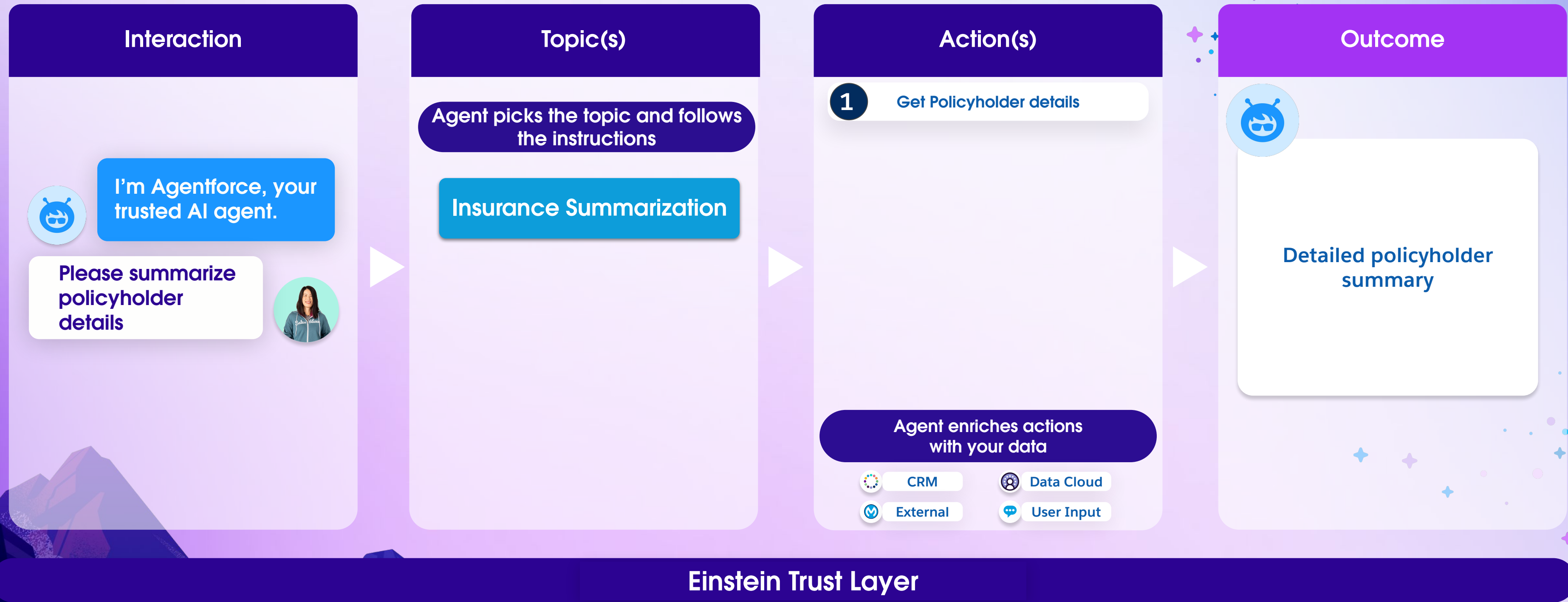
The screenshot displays the Salesforce Agentforce interface for a policyholder named Mrs. Rachel Adams. The interface is divided into several sections:

- Person Account:** Mrs. Rachel Adams, with fields for Account Number (CI49847), Email (radams@example.com), Phone ((415) 371-7777), and Billing Address (8370 Greensboro Drive, McLean, Virginia 22102, United States). Action buttons include Follow, Submit for Approval, Schedule Appointment, and Add to an Actionable List.
- Life Events:** A timeline showing key events: Born (Jun 7, 1984), Zoe Teen Driver (Jul 3, 2024), Marriage with Mark (Jul 7, 2014), Tysons Home (May 5, 2023), and Pet. A "Recents first" toggle and "All Years" filter are present.
- Details:** Engagement, Business Management, Analytics, Relationship Center, and Related tabs. The Engagement tab is active, showing an Activity section with an Interaction Summary and buttons for Email, Log a Call, New Event, and New Task. Filters are set to All time, All activities, and All types.
- Agentforce (Default):** A sidebar chat window with a default greeting: "Can you get the details for the policyholder Rachel Adams?" and a summary of the account details, including the policy name (PN - 100), effective date (March 11, 2025), and term premium (\$450).



# Insurance Service Assistance In Action

salesforce





# 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

AccountState

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...

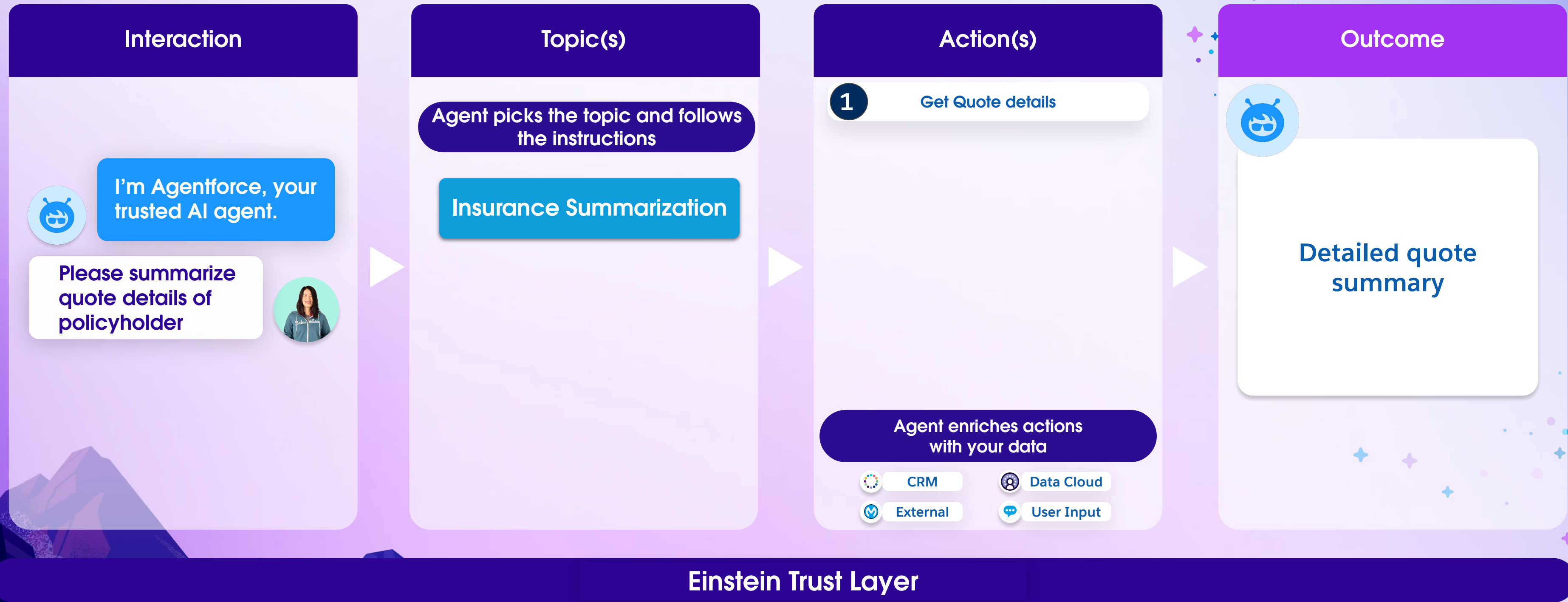
Generate Policyholder Summary





# Insurance Service Assistance In Action

salesforce





# Action: Get Quote Details



## 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

AccountState

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



Product Catalog Management

Home

All Insurance Policies

Insurance Policies

All Insurance Policies

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

Success Message

10 Policies have been successfully renewed.

[View All](#)

Bulk Renewal

New

Delete

Clone

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

salesforce

BIAN inspired APIs for all integrations

Deploy same processes across channels

Customizable service process templates

Support multiple languages

The screenshot displays the Salesforce Agentforce interface. At the top, there's a navigation bar with tabs for 'Insurance Service.', 'Contacts', and a search bar. Below this, a header shows the user 'Jenny Will' and a list of active processes: '00:00:07 Debbie...', '00001967', '00001968', and '00001969'. The main content area is divided into three sections. The left section, 'Actions', lists various service processes: 'Auto FNOL', 'Proof of Insurance', 'Cancel Policy' (highlighted with a pink border), 'Address Update', 'Change billing cycle', 'Manage Beneficiaries for Wealth', 'Profile Changes for Wealth', 'Manage Standing Instructions for Wealth', 'Manage Complaints', and 'Transaction Disputes'. The middle section shows a search bar and a list of claims, including 'Jenny Will - Auto Claim 2024' with a status of 'Open'. The right section, 'Agentforce', displays a comparison summary between two auto quotes, including details on coverage limits, deductibles, policy terms, and premiums. A 'Generate' button is visible at the bottom right of the Agentforce section.



# Simplify the Policy Cancellation Service Process



Retail Banking

Accounts

Andy Flower | Acco...

Cancel I...

Search...

Star

Plus

Shield

Question

Settings

Notifications

Avatar

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

i

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



salesforce

# 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

Collection Case

Julia Home Loan Collection

Collection ID

005671234

Case created on

Jan 10, 2024

Contact

Julia Green +1

Priority

High

✓

Custom...

Escalation

Recovery

Closed

Details

Collection Activity

Related

Collection Activity Timeline

5 Items • Latest event First

✉ 2 email sent

💬 1 message sent

📞 0 calls logged

📧 0 email opened

✓ 2 out of 4 tasks completed

Current and Overdue

>

Collection call 1: Call

Call to Julia Green and Marcel Green

✓ Contact made

Past

>

Automated Email 2: Send Reminder email

You sent repayment reminder email to Julia Green and Marcel Green

>

Automated task: Send first delinquency notice

Collection dept sent First Delinquency letter

>

Automated Email: Send Reminder email 1

Collection dept sent repayment reminder email to Julia Green and Marcel Green

>

Payment missed. Assigned to pre-collection

Moved to pre-collection

Task due today (1)

Payment reminder call 1

Repayment reminder call to Julia Green

Call

Call Controls

Connected

+1(987) 654-3210

Julia Green

00:00:07

Conversation

Transcription

Live Video

I'm so sorry to hear that. I'm happy to look into the issue for you.

Trisha • 00:55

I've been a loyal customer for 8 years and this is absolutely absurd! Is there any option you can recommend for some period.

Julia • 00:49

Reply to message

Leave

Send

Action Launcher

Search actions...

Julia Green

Boyle St, San Francisco, CA

+1(987) 654-3210

Gold

Age 35+

Credit Report

Financial Overview

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, s repayment plan, settlement, or extension 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

4.Payment Methods:

Explain the available payment methods (mail, etc.). Be ready to assist with the pa if necessary.

Few Recommendation

Restructure Loan Terms

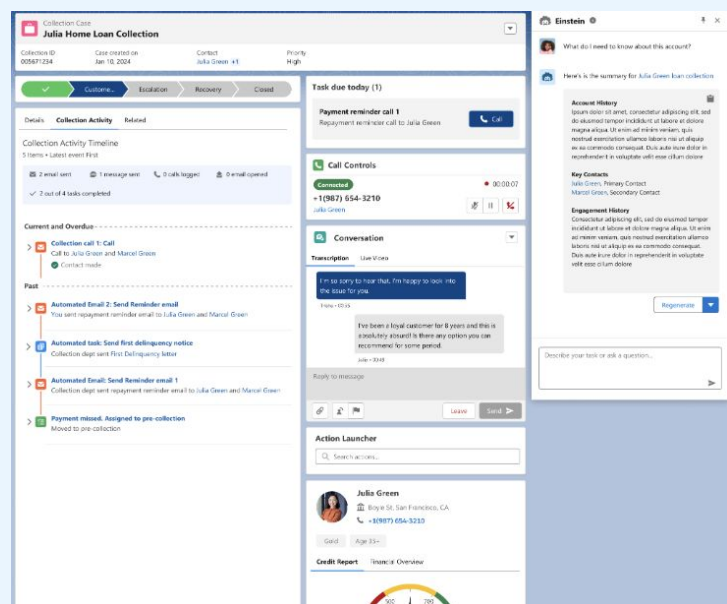
Apply for moratorium

360 Customer View to Increase Collection Success



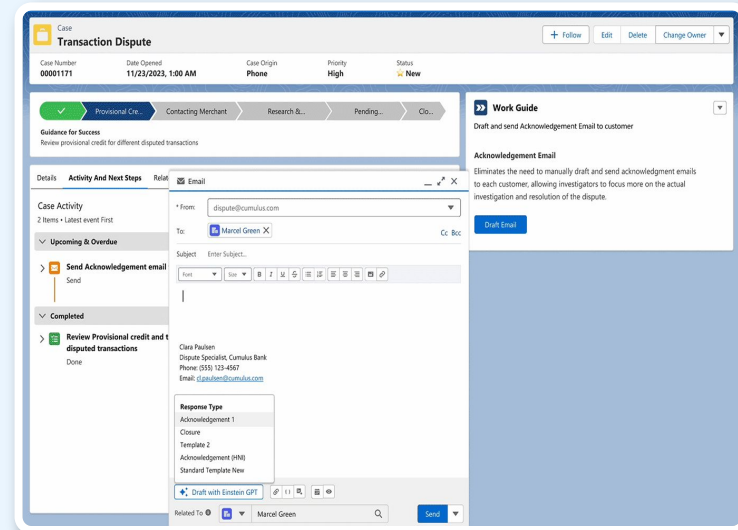
# Collections Product Enhancements

What's new Launching June '25



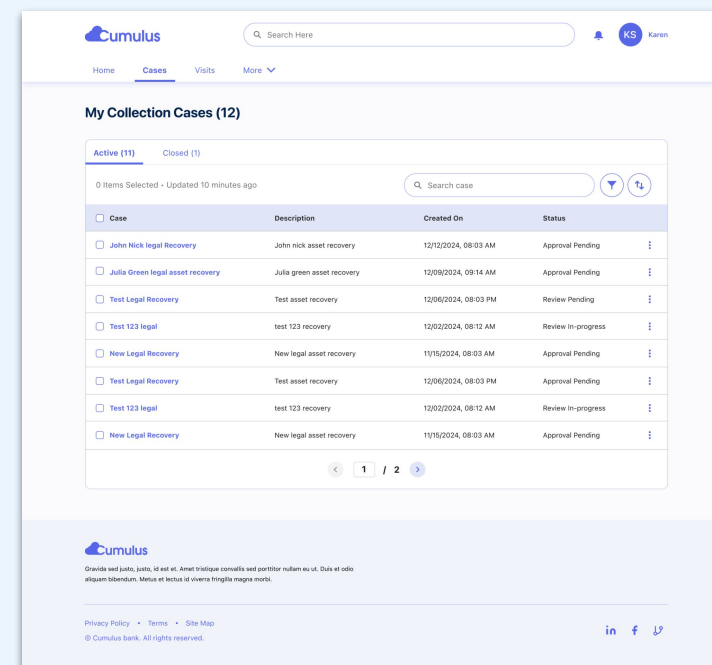
## Agentforce Collections Assistance

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



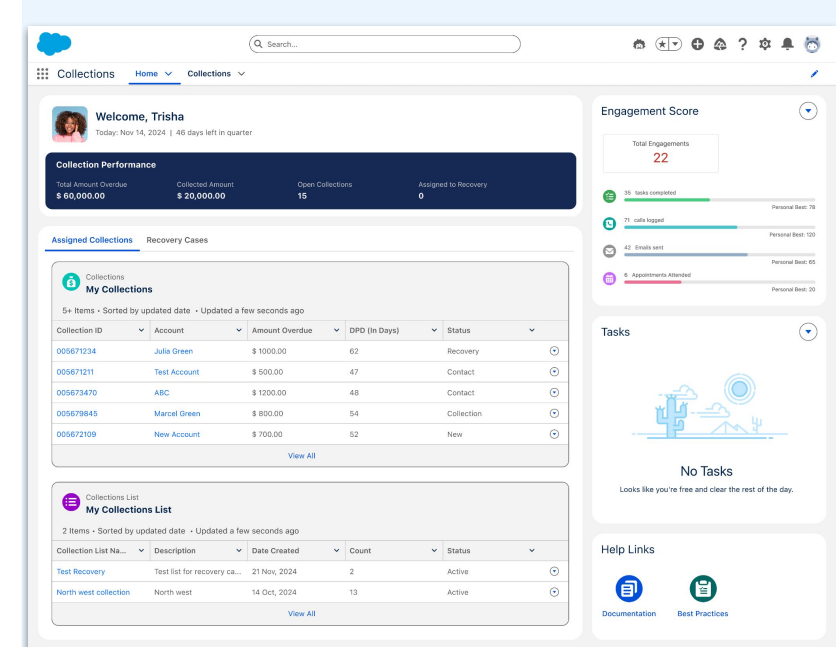
## Marketing Cloud Integration

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

## 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 image shows a web application interface for managing collections. At the top, there's a navigation bar with a search bar and several icons. Below the navigation bar, the interface is divided into several sections. On the left, there's a sidebar with a user profile for 'Julia Green' and a 'Collection Plan Activities' section. The main content area features a 'Collections' section with a search bar and a 'New Promise to Pay' button. Below this, there's an 'Alerts' section showing 'No Active Alerts'. The 'Promise to Pay' section is expanded, showing details for a specific item 'PP-0094589213' with a table of payment schedules. On the right, there's a 'Knowledge' section with a search bar and 'Einstein Recommendations'. A cartoon robot character is positioned at the bottom center of the interface.



# Collections Assistance Agent In Action

salesforce





# Action: Generate Talking Points

Provides employees with structured and contextual communication guidance

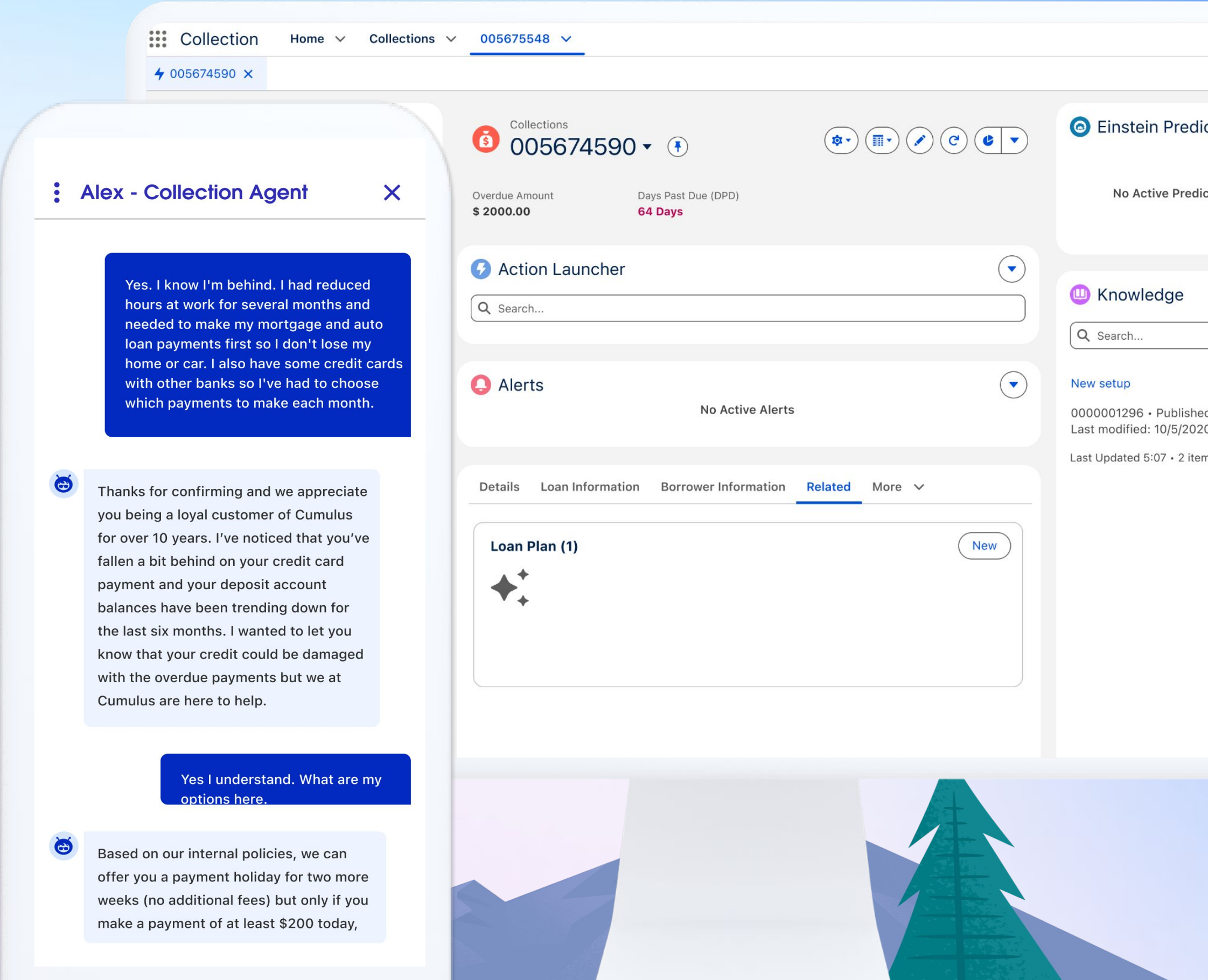


## Personalized Talking Points

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

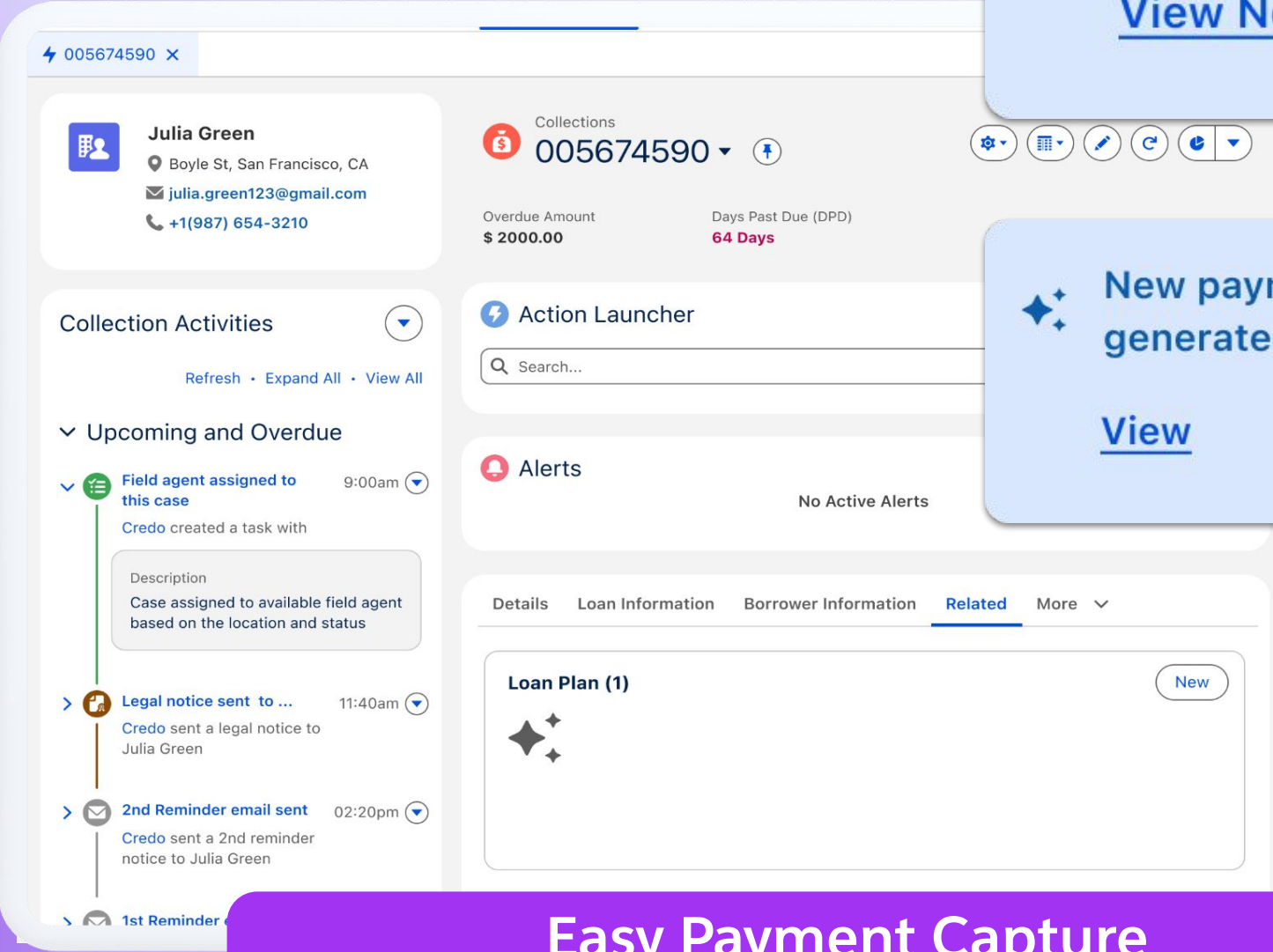
Real-time on-screen prompts recommend the next best question, payment option, or compliant disclosure, helping agents navigate every discussion smoothly toward resolution





# Action: Generate Promise to Pay & Payment Link

Instantly capture collections commitments and payments on Salesforce Pay Now



✦ 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

## Easy Payment Capture





# 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

005674590 X

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

**Collections**  
005674590

Update Status

**Edit Action**

Collection Status  
In-progress

Action  
Initiate Bankruptcy

Origin  
Call

☒ Create Case

**Case Details**

Case Type  
Priority  
High

Case Owner

Description

Cancel Save

**Collection Activities**  
Refresh Expand All View All

Upcoming and Overdue

Field agent assigned to this case 9:00am  
Credo created a task with  
Description  
Case assigned to available field agent based on the location and status

Legal notice sent to ... 11:40am  
Credo sent a legal notice to Julia Green

2nd Reminder email sent 02:20pm  
Credo sent a 2nd reminder notice to Julia Green

1st Reminder email sent 02:20pm

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

+ Follow

New

Edit

Dele

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

Clos

Details

Activity

Related

Refresh

Expand All

View All

▼ 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 Re**

Total Due Amount recovered: **\$1000**

Payment Receipt (1)

Receipt	Created On
#200134578244	04/02/202

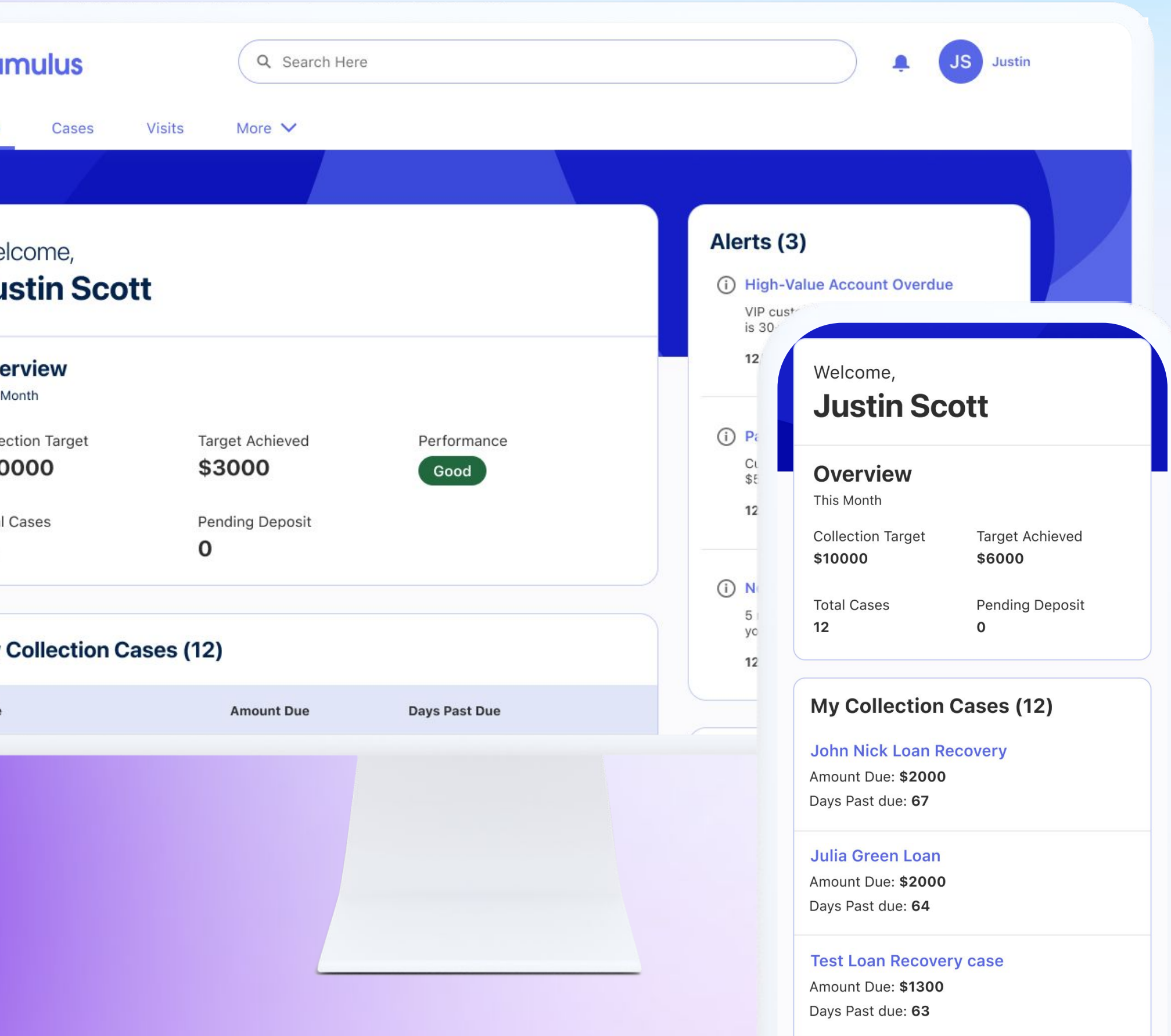
Select Action

☐ Approve

☐ Reject



# Collections Recovery Portal



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



salesforce

# 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

Cumulus

Search

★ + ? 🔔 👤

Cumulus Bank

Home Applications

Application

Michael Smith – 168795

Approve application Reject application Submit for approval

Application Number	Applicant Name	Requested Amount	Requested Term	Loan Product	Stage	Submitted Date
168795	Michael Smith	\$10,000.00	48 months	Unsecured loan	-	04/10/2023

✓

✓

Offer / Final review

Doc Prep

Booked

Closing

Complete

Mark Status as Complete

Applicant Details

Applicant Profile

Offers

Loan Documents

Application History

Related

Applicant Profile

12 items • Sorted by Number • Filtered by All

Primary Applicant

> KYC

> Credit Profile

> Employment and Income

> Expenses

> Liabilities

Run KYC

Account 1

Title	Type
Home Mortgage Loan	Mortgage

Description	Account Number
-------------	----------------

Action Items

Task Type

Select the type of task

Assignee Type

Select the assignee type

Assignee

Select the assignee

Subject

Subject of the subject

Description

Describe your message

Due date

mm / dd / yyyy

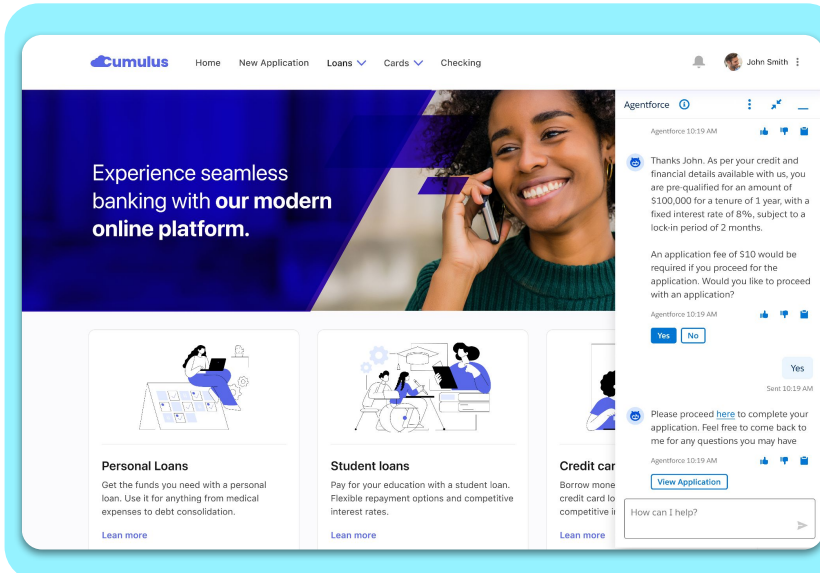
Preconfigured Solutions for Secured and Unsecured Loans





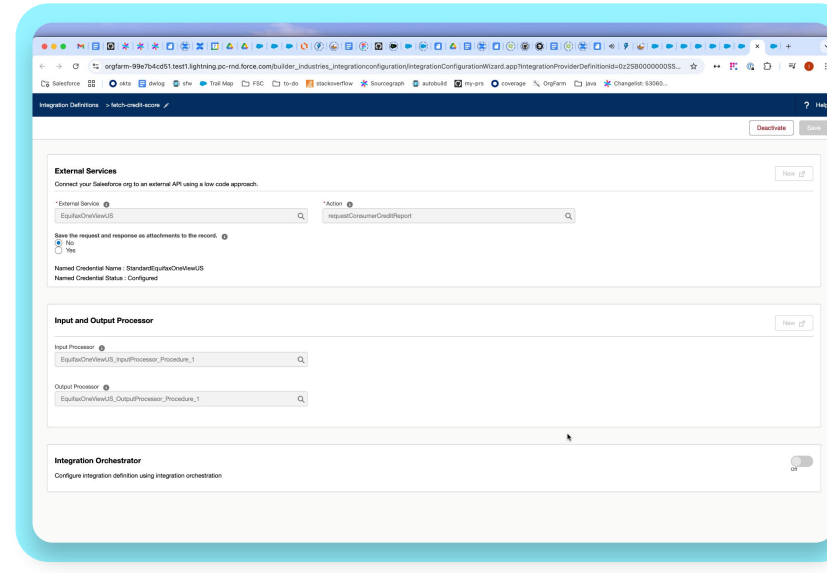
# Digital Lending Enhancements

Coming in June '25



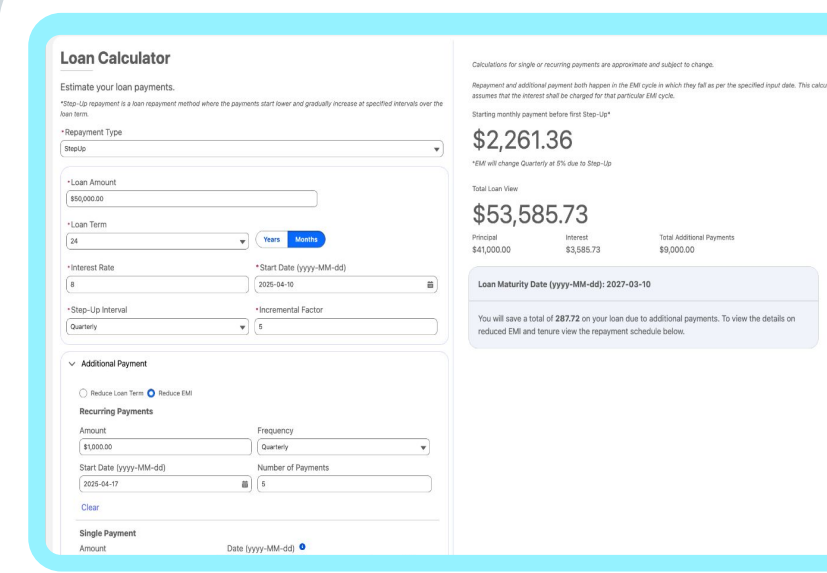
## Agentforce Loan Product Assistance

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



## Equifax Integration

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



## 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



Agentforce Builder

Loan Officer

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

Data

Connections

Context

Language

Events

← 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

Compare this with the other personal loans

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:\n\n1. Interest Rates\n2. Fees\n3. Terms\n\nWhich parameters would you like to compare?"

Plan ID: cd37b4d2f44b

User Prompt

Describe your task or ask a question...

Cumulus

Home

New Application

Loans

Cards

Cumulus Loan Agent

John Smith

Cumulus Loan Agent

Cumulus Loan Agent 10:19 AM

I am planning a family vacation to Hawaii, and looking for a loan.

Sent 10:19 AM

That's great! For your purpose, we offer the following personal loans

1. Cumulus Personal Loan

2. Cumulus FlexiPay Loan

3. Revolving Fund Loan

Would you like to learn more about any of these?

Cumulus Loan Agent 10:20 AM

I am looking for a short term loan with a small loan amount that I can quickly pay back.

Sent 10:20 AM

How can I help?



# Loan Product Assistance Agent In Action

salesforce





# Action: Retrieve Loan Product Categories



Agentforce Builder

Lending Product Assistance Agentforce Service Agent

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

Data

Connections

Context

Language

Events

← 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...

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

what loans do you offer?

Plan ID: a2e8d7bfcd2d

User Prompt

What loans do you offer?

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

0.22 sec

Retrieve Loan Product Categories (RetrieveLoanProductCategories)

Retrieves the loan product categories.

Input

{}

Output

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

Reasoning

GROUNDING: 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.

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:

- 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?

Describe your task or ask a question...

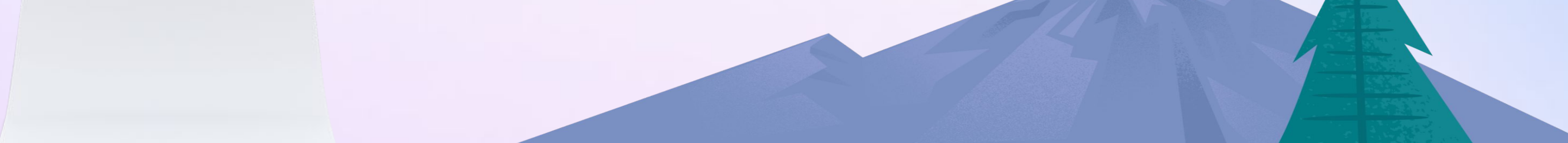


Agentforce Loan Product Assistance

Retrieve Loan Product Categories

Retrieves active loan categories

Describe your task or ask a question...





# Action: Retrieve Products By Category



Agentforce Builder

Lending Product Assistance Agentforce Service Agent

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

Data

Connections

Context

Language

Events

Checklist

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...

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

“What products do you offer under home loans?”

Plan ID: 840c659845bc

User Prompt

What products do you offer under home loans?

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

0.28 sec

Retrieve Products By Category (RetrieveProductsByCategory)

Retrieves the active product records that belong to the specified category.

Input

Output

Reasoning

GROUNDING: The response accurately lists the home loan products retrieved from the function call, including their names and descriptions.

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:

- 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?

Describe your task or ask a question...

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



Agentforce Builder

Lending Product Assistance Agentforce Service Agent

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

Data

Connections

Context

Language

Events

← 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...

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

“Tell me about programs under this loan”

Plan ID: 7c791ba1990c

User Prompt

Tell me about programs under this 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

0.30 sec

Retrieve Programs By Product (RetrieveProgramsByProduct)

This action retrieves all programs associated with the specified product.

Input

Output

Reasoning

GROUND: The response provides details about the Cumulus Bank DreamHome Loan Program, which were retrieved using the function /lendProgDcwr\_RetrieveProgramsByProduct.

Conversation Preview

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...

## Retrieve Programs by Product

Retrieves all programs associated with the given product.



Agentforce Loan Product Assistance



# Action: Retrieve Program Details



Agentforce Builder

Lending Product Assistance Agentforce Service Agent

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

Data

Connections

Context

Language

Events

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...

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

"Tell me more about this"

Plan ID: f67a1862cef0

User Prompt

Tell me more about this

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

0.44 sec

Retrieve Program Details (RetrieveProgramDetails)

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

Input

Output

{ "programId": "11WSG0000007JM52AM" }

{ "Prompt": "Program: {\nCategory: ,\nEffectiveYear: ,\nEndData: ,\nId: 11WSG0000007JM52AM.\nActive: true.\nStatus: " }

Conversation Preview

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?

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



Agentforce Builder

Lending Product Assistance Agentforce Service Agent

Version 1 (Active)

Settings

Help

Batch Test

Deactivate

# Topics

← 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...

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

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

0.49 sec

Retrieve Product Details (RetrieveProductDetails)

Retrieves product and its related records such as product fee, product list rate, term related object, and term.

Input

Output

Reasoning

Agent Response

Suggest Improvement

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?

Describe your task or ask a question...

## 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.



## Agentforce Loan Product Assistance



# Action: Analyze Estimated Loan Amount



# Topics

Data

Connections

x Context

Language

Events

Checklist

← 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

Output

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

```
{  "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.

Batch Test Deactivate

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...

Agentforce Loan Product Assistance

## 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

salesforce

## 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.

The screenshot shows the Salesforce Integration Configuration Wizard for Equifax OneView US. The browser address bar displays the URL: `orgfarm-99e7b4cd51.test1.lightning.pc-rnd.force.com/builder_industries_integrationconfiguration/integrationConfigurationWizard.app?integrationProviderDefinitionId=0z2SB0000000SS...`. The page title is "Integration Definitions > fetch-credit-score".

The configuration is divided into three main sections:

- External Services:** Connect your Salesforce org to an external API using a low code approach. It includes a "New" button and a search bar. The "External Service" is set to "EquifaxOneViewUS" and the "Action" is "requestConsumerCreditReport". There is a checkbox for "Save the request and response as attachments to the record." with "No" selected. The "Named Credential Name" is "StandardEquifaxOneViewUS" and the "Named Credential Status" is "Configured".
- Input and Output Processor:** Includes a "New" button and search bars. The "Input Processor" is "EquifaxOneViewUS\_InputProcessor\_Procedure\_1" and the "Output Processor" is "EquifaxOneViewUS\_OutputProcessor\_Procedure\_1".
- Integration Orchestrator:** Configure integration definition using integration orchestration. It has a toggle switch that is currently "Off".



# 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

\$41,000.00

Interest

\$3,585.73

Total Additional Payments

\$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



Insurance Agency

Account ▾

ABC Enterprises ▾

Insurance Policies

All Insurance Policies ▾

13 items • Updated a few seconds ago

Notifications

Mark all as read X

Insurance Policies Renewed

Renewal of 30 insurance policies successfully completed

Dec 9, 2024, 9:32 PM

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

Renew and Cancel Policies in Bulk



# Insurance Brokerage Enhancements



Brokerage

Home

Demo-Split-Flat-David-Team

Search...

Send

Clone

Split-Flat-David-Team

Split Arrangement Type

First Term

Effective

1/1/202

Details

Related

Producer Split Arranger

Producer Split Assignm

Round Off  
Producer Splits

New Producer Split Arrangement Line Item

Producer Split Arrangement

House - Sally First Year PSA

Split Type

Commission

Producer

Search Producers...

Producer Relation Type

Input text

Producer Role

-- None --

Subsequent Producer Split Arrangement

Search Producer Split Arrangements...

Split Percentage

Enter Split Percentage...

Flat Currency Amount

Enter Amount...

☒ Round Off

Selecting this option will remove rounding off for any other Producer Split Arrangement Line Item

Cancel

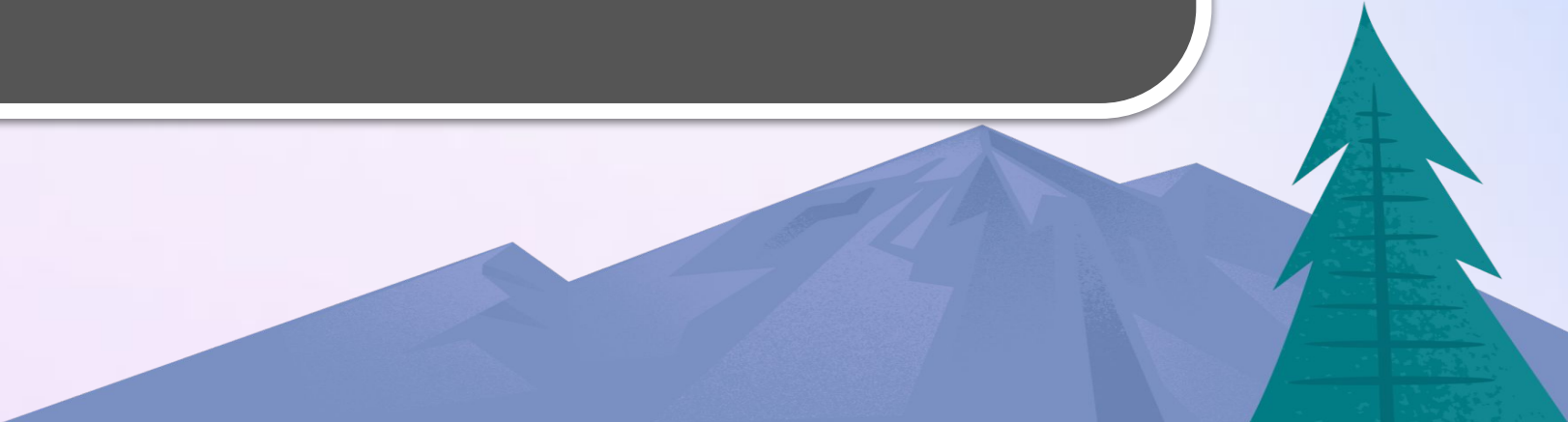
Save & New

Save

Indicate where amounts from rounding should be allocated

Commission Splits Using Flat Amounts

Split producer commissions based on percentages or flat amounts





# Insurance Brokerage Enhancements

Commission Split Using Flat Amounts - alternate screenshot



Commission Splits  
Using Flat Amounts

Search...

Brokerage

Home

Demo-Split-Flat-David-Team

Producer Split Arrangement

Split-Flat-David-Team

SendClone

Split Arrangement Type

Effective Date

End Date

First Term

1/1/2025

Details

Related

Producer Split Arrangement Line Items (4)

	Name	Producer	Split Percentage	Split Amount	
<input type="checkbox"/>	PSALI-00001	Becky Hickie		USD 500.00	
<input type="checkbox"/>	PSALI-00002	Violet Kilback	10%		
<input type="checkbox"/>	PSALI-00003	Jason Renner	70%		
<input type="checkbox"/>	PSALI-00004	House	20%		

View All

Producer Split Assignment (0)

New

Activity

Timeline

Filters: All time • All activities • All types

RefreshExpandView All

> Upcoming & Overdue

No activities to show.  
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

