

Empower Teams and Delight Borrowers by Humanizing the Recovery Experience

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

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



Agentic Collections and Recovery

Proactive

Predictive Borrower Outreach

Identify at-risk accounts using AI-driven insights to initiate proactive support before defaults occur

Empathetic

Empathetic Agentforce Recovery

Deploy autonomous agents to provide rapid, compassionate financial solutions that prioritize the customer relationship

Efficient

Streamlined Case Management

Centralize and simplify complex collection workflows to improve representative efficiency and reduce administrative friction

Comprehensive

End-to-End Resolution

Manage every stage of the recovery lifecycle from initial payment plans through formal litigation.

Unified

Integrated Borrower 360

Connect seamlessly with core banking platforms to gain a unified view of every borrower.



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

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Here’s how it works.

- 1

Predict & Prevent
Spot risk early and engage borrowers proactively before a missed payment occurs
- 2

Unify Visibility
See the complete borrower financial picture by replacing fragmented, legacy systems with a single platform
- 3

Empower Collection Specialists
Equip your teams with AI, data, and guided workflows to drive successful recoveries and reduce specialist burnout



Why Choose Salesforce Collections & Financial Recovery?



Pricing: Collections & Financial Recovery

Collections & Financial Recovery

Included in all
**Financial Services Cloud
Advanced & Max SKUs**
(comes with one time per org seed credits)

+

Add-ons
Purchased Separately

Collection Credits
\$1000 per 1000 additional credits

Collections & Financial Recovery

Capability Matrix

Feature	Description	Collections
Included in FSC Advanced & Max Editions		
Delinquency Prediction & Mitigation		
Automated Outreach	Orchestrate collections campaigns and segments based on likelihood to and account currently in default	✓
Delinquency Signal Prediction Builder	Configurable predictive model to predict delinquency and classify loans by severity of default	✓
Empowering Collections Specialists		
Action Launcher	Allow collections agents to launch actions quickly based on borrower responses. Action launcher can now automatically launch actions based on keyword detected via phone and chat.	✓
Collections Analytics Dashboards	Use ready-made dashboards to track recovery rates, agent productivity, and portfolio health so you can optimize faster.	✓
Collections Customer Agent	Serve customers faster and collect more efficiently with this AI Collections Agent designed to service borrowers and collect 24/7 to scale support and recovery efforts without adding headcount.	✓
Collections Employee Agent	AI agents pre-built to understand the complex world of collections and designed to automate manual work to allow human collections specialists to focus on turning high-emotion moments into successful opportunities to collect and build customer loyalty	✓
Dialer Integration	Seamlessly integrate an automated dialer to execute prioritized outreach lists, ensuring agents only connect with live borrowers, eliminating manual dialing and idle time.	✓
Engagement & Timeline	All information related to in-person meetings (engagements) and correspondence and an interactive timeline of client information	✓
Flex Cards	Easy to figure and display data	✓
Identity Verification	Verify the identity of a borrower before you share any sensitive information with them	✓

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Late-Stage Recovery Console	Give recovery teams a purpose-built workspace. Track collateral, manage repossessions, and coordinate fieldwork all in one console.	
One-Click Call Logging	Specialist can log results, trigger next steps, and stay compliant without losing momentum.	
Record alerts	Alerts from third-party systems that can trigger workflows in Collections & Financial Recovery	
Talking Points	Increase collections agents throughput by leveraging generative AI to suggest context aware talk track	
Flexible Repayment		
Borrower Repayment Comparison	Allow borrowers to compare repayment and restructuring options side by side to choose what works best for them.	
Flexible Repayment Modeling	Explore repayment options and model outcomes directly in the workflow to guide better decisions	
Legal Correspondence Letter Templates	Eliminate manual work by instantly generating correspondence templates to support legal processes from pre-built templates	
Payment Restructuring	Allow specialists to resolve accounts faster by easily restructuring payment terms within predefined company policies, ensuring both customer flexibility and consistent business compliance on every interaction.	
Promise to Pay Flow	Systematically record the borrower commitment to clear outstanding due via dedicated screen flow and data model objects	
Promise to Pay Widget	Easily configure and track promise to pay with reminder, escalations, and configure based on loan/invoice type and amount.	
Salesforce "Pay Now" Integrations*	Allow collections agents to generate payment links that direct customers to a mobile-responsive web page where they can make immediate payments	

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Feature	Description	Collections
Simplify Collection Case Management		
Audit Trail	Easily show update to and changes made to financial accounts	✓
Automation Templates	Streamline common collection processes using templates that allow for customization	✓
Collections Agent Console	Single console to view data from multiple systems with pre-built integration and embedded recommendations to personalize collections conversations and drive efficiency	✓
Collections Bulk Actions	Bulk assignment and deletion of collection records actions in an actionable list to trigger processes like an account redebit or revision to a collections case prior to needing formal outreach	✓
Collections Case Management	Simplify the management of cases related to specific collections activities by consolidating multiple cases into a single, comprehensive collection.	✓
Collections Case Prioritization	Predictive model used to identify and score cases based on likelihood to make contact and recoup funds.	✓
Collections Case Segmentation	Input and categorize collections segments in bulk	✓
Collections Compliance & Controls	Built-in customizable controls to ensure your collections processes remain compliant – whether they are managed by a human or Agentforce collections agent	✓
Collections Data Model	A pre-built data model organizes every part of the collections process so your data stays connected, accurate, and ready for analytics.	✓
Collections Interaction Outcomes	Easily capture collections outcomes linked to a collections case	✓
Consolidated Collections	Eliminate screen switching by providing agents with a 360-degree view of all outstanding collection accounts in a single, unified view, enabling faster and more informed decisions.	✓

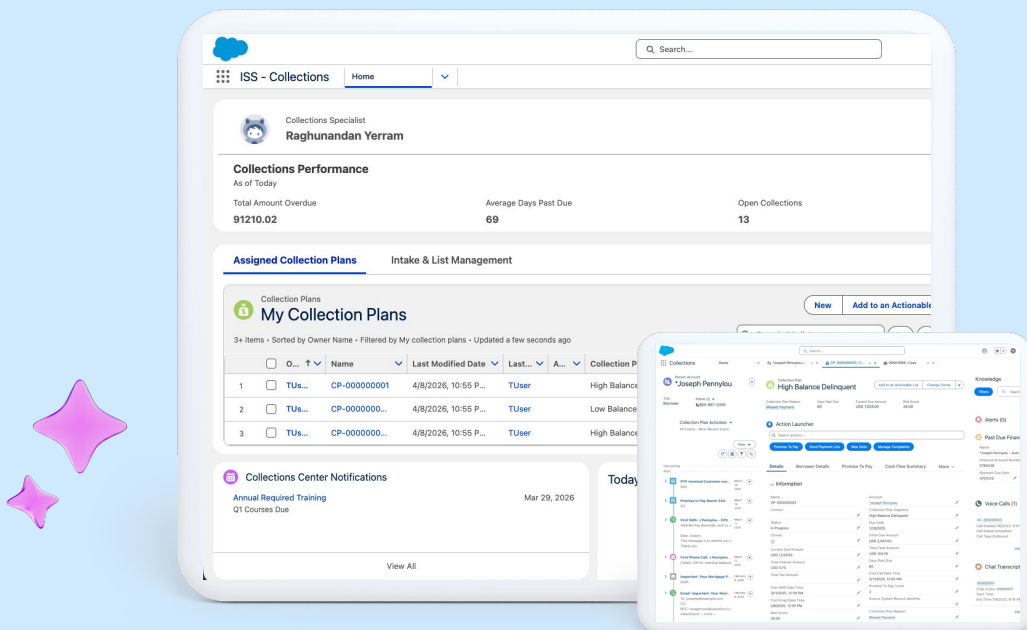
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Collections & Financial Recovery

Capability Matrix

Feature	Description	Collections
Core Banking Integration	Connect to third-party systems with prebuilt integrations and execute core banking processes directly in Collections & Financial Recovery	✓
Data Consumption Framework	Confidently import large volumes of collections data into Salesforce with assurance that the platform can handle advanced error management	✓
Intake & Collections List Management	Standardize intake and assignment of a prioritized list of financial accounts / invoices earmarked for collections	✓
Intelligent Collections Case Scoring	Automatically score and prioritize cases, allowing your collections team to focus on the most recoverable accounts first and significantly increasing overall recovery rates and efficiency.	✓
Loan Management System Integrations	Integration with debt servicing and loan management systems end-points (direct or via Mulesoft)	✓
Process Automation Studio	Build end-to-end collections processes with low/no code tools	✓



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