Agentforce Financial Services Winter '26 Release

Agent*force*
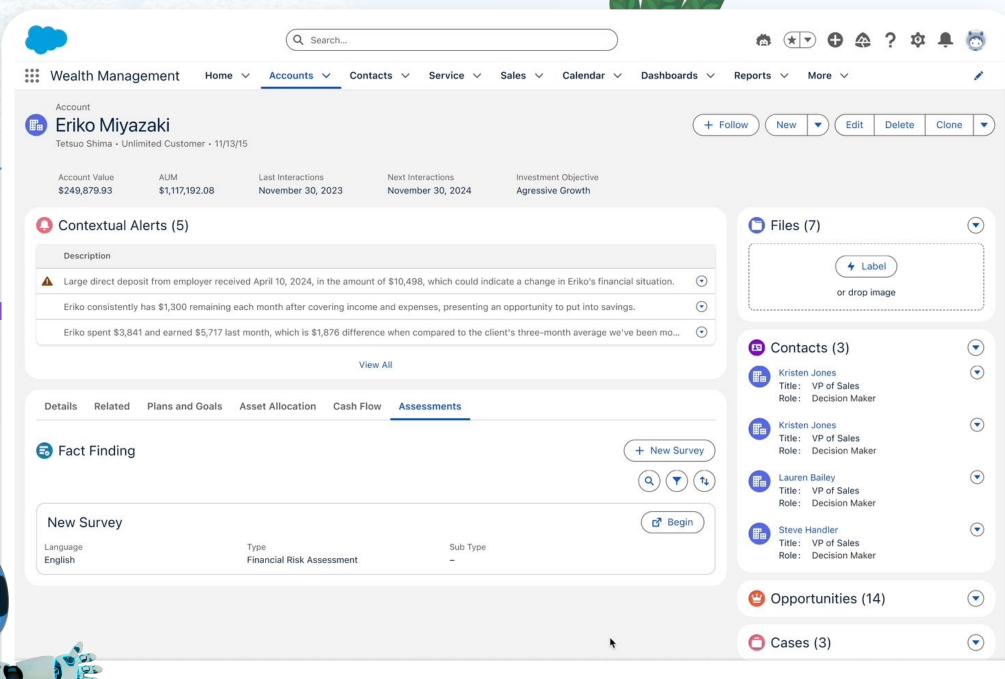# Financial Services

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 | Oct'25

Financial Advisor Assistance Enhancements

Collections Assistance Enhancements

Banking Service Assistance Enhancements

Insurance Service Assistance Enhancements

Salesforce Go

*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.
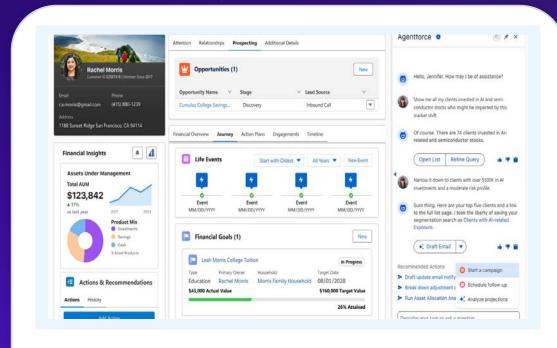

Q Search...

Wealth Management Home ⌄ Accounts ⌄ Contacts ⌄ Service ⌄ Sales ⌄ Calendar ⌄ Dashboards ⌄ Reports ⌄ More ⌄

Account
Eriko Miyazaki
Tetsuo Shima • Unlimited Customer • 11/13/15

+ Follow   New ⌄   Edit   Delete   Clone ⌄

Account Value	AUM	Last Interactions	Next Interactions	Investment Objective
$249,879.93	$1,117,192.08	November 30, 2023	November 30, 2024	Agressive Growth

🔔 **Contextual Alerts (5)**

Description
⚠ Large direct deposit from employer received April 10, 2024, in the amount of $10,498, which could indicate a change in Eriko's financial situation.
Eriko consistently has $1,300 remaining each month after covering income and expenses, presenting an opportunity to put into savings.
Eriko spent $3,841 and earned $5,717 last month, which is $1,876 difference when compared to the client's three-month average we've been mo...

View All

Details   Related   Plans and Goals   Asset Allocation   Cash Flow   **Assessments**

🔲 **Fact Finding**

+ New Survey

New Survey

Begin

Language	Type	Sub Type
English	Financial Risk Assessment	–

📁 **Files (7)**

⚡ Label
or drop image

📇 **Contacts (3)**

Kristen Jones
Title: VP of Sales
Role: Decision Maker

Kristen Jones
Title: VP of Sales
Role: Decision Maker

Lauren Bailey
Title: VP of Sales
Role: Decision Maker

Steve Handler
Title: VP of Sales
Role: Decision Maker

👑 **Opportunities (14)**

🗂 **Cases (3)**

Agentforce For Financial Services: Financial Advisor Assistance

Your trusted autonomous agent for every service experience

Agentforce Financial Services - Wealth Management

Financial Advisor Assistance

Assist advisors to help in generating meeting agenda, create action plans and set alerts. Significantly improve the advisor productivity and empower them to deliver next-gen experience to their clients.

New Topic: Post-Meeting Follow-ups

Wealth Innovation

Introducing **Agentforce** Financial Services

salesforce

Financial Advisor Assistance

Reduce meeting preparation time
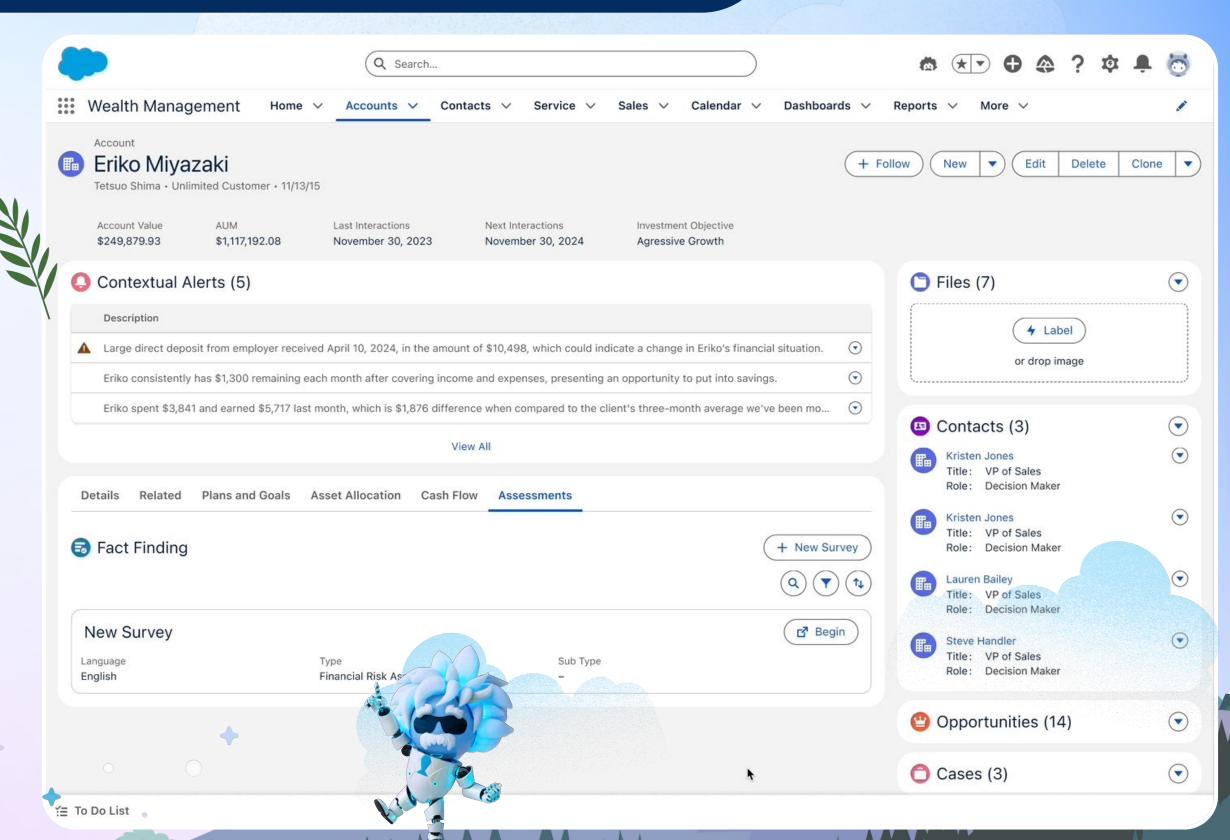
Automate mundane tasks like gathering client information and portfolio performance help advisor to prepare quickly

Review client data

Assist advisor by sharing current and target allocation data, notifying on key life events and updating on plans and goals

Create critical tasks

Let advisor stay on top of things by creating a meeting agenda and an action plan to share with clients

Topic: Meeting Preparation

Actions

Preparation for client meetings is now seamless and intuitive. With the new actions, advisors can ensure they are always prepared and organized.
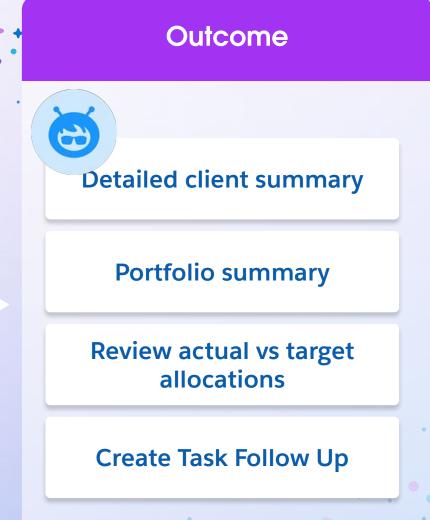
- Summarize Account Financial Details
- Summarize Financial Plans and Goals
- Summarize Household Financial Details
- Summarize Portfolio Performance
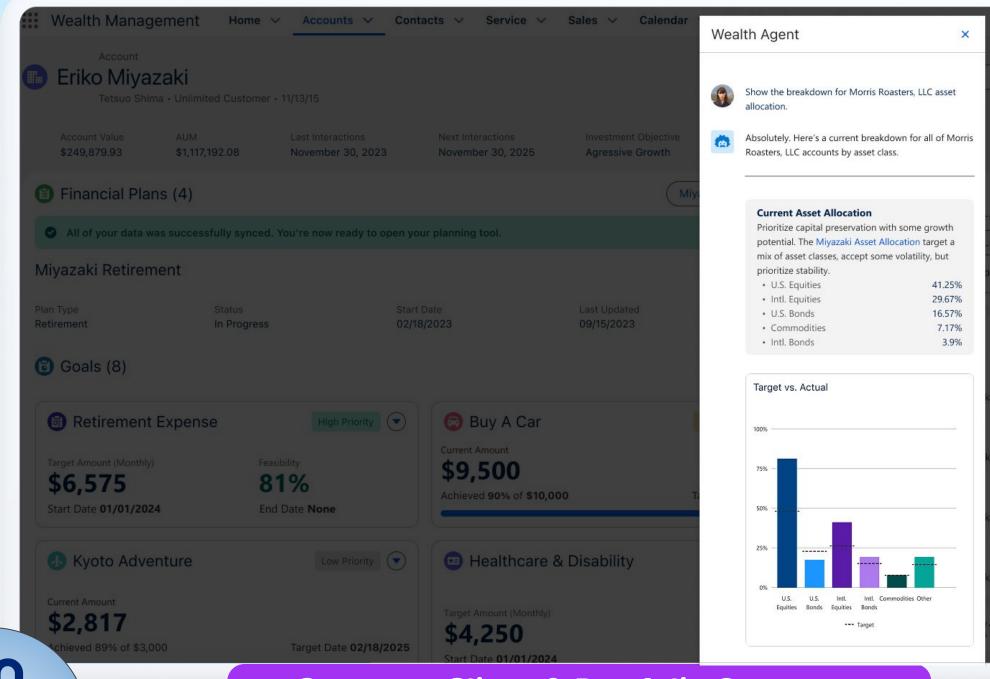- Review Asset Allocation
- Get Client Life Events
- Summarize Account Record Alerts
- Summarize Agenda Drafts
- Create or Update Agenda Draft
- Create Record Alert

60 minutes of advisor time saved per meeting

Wealth Management — Home · Accounts · Contacts · Service · Sales · Calendar

Account
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Tetsuo Shima · Unlimited Customer · 11/13/15

Account Value	AUM	Last Interactions	Next Interactions	Investment Objective
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Financial Plans (4)

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

Miyazaki Retirement

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

Goals (8)

Retirement Expense — High Priority
Target Amount (Monthly) **$6,575**   Feasibility **81%**
Start Date 01/01/2024   End Date None

Buy A Car
Current Amount **$9,500**
Achieved 90% of $10,000

Kyoto Adventure — Low Priority
Current Amount **$2,817**
Achieved 89% of $3,000   Target Date 02/18/2025

Healthcare & Disability
Target Amount (Monthly) **$4,250**
Start Date 01/01/2024

Wealth Agent

Show the breakdown for Morris Roasters, LLC asset allocation.

Absolutely. Here's a current breakdown for all of Morris Roasters, LLC accounts by asset class.

Current Asset Allocation
Prioritize capital preservation with some growth potential. The Miyazaki Asset Allocation target a mix of asset classes, accept some volatility, but prioritize stability.

U.S. Equities	41.25%
Intl. Equities	29.67%
U.S. Bonds	16.57%
Commodities	7.17%
Intl. Bonds	3.9%

Target vs. Actual

Generate Client & Portfolio Summary
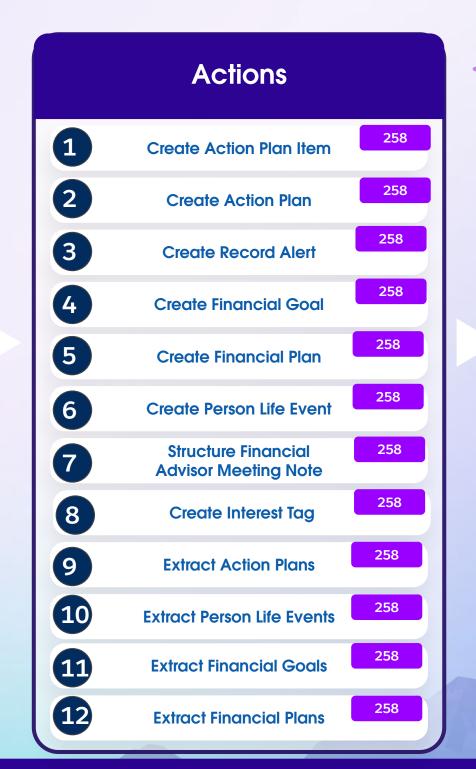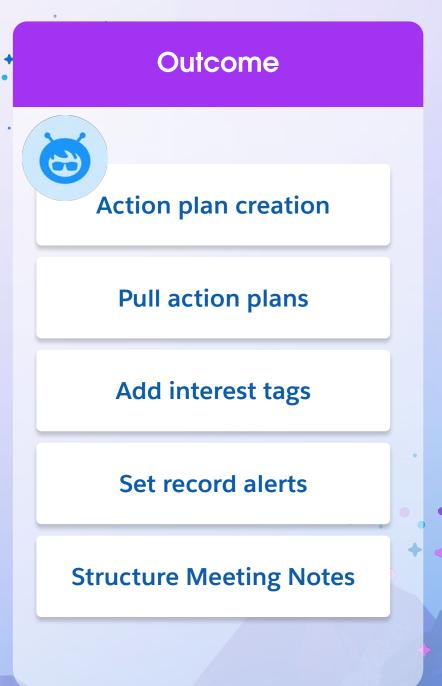
Topic: Post-meeting Follow-up

salesforce

Actions

Post-meeting activities are never so easy. The latest actions streamlines advisor activities giving them more time to build meaningful relationships.

- Create Action Plan Item
- Create Action Plan
- Create Record Alert
- Create Financial Goal
- Create Financial Plan
- Create Person Life Event
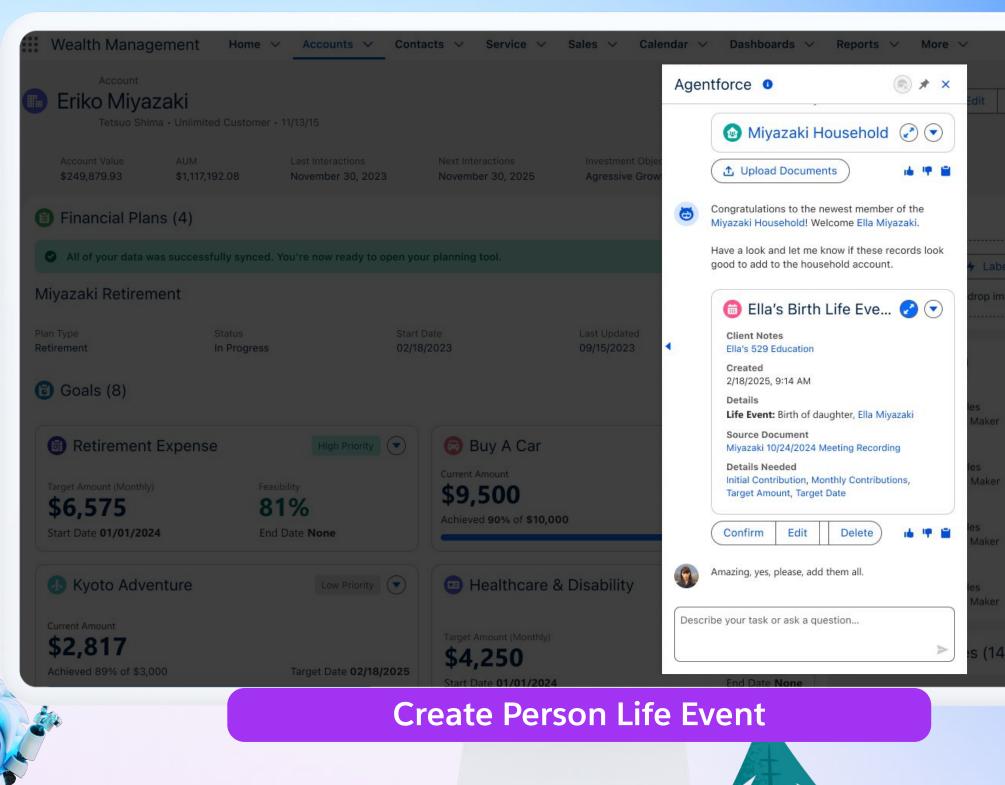- Structure Financial Advisor Meeting Note
- Create Interest Tags
- Extract Action Plans
- Extract Person Life Events
- Extract Financial Goals
- Extract Financial Plans

Wealth Management   Home ⌄   Accounts ⌄   Contacts ⌄   Service ⌄   Sales ⌄   Calendar ⌄   Dashboards ⌄   Reports ⌄   More ⌄

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$6,575 81%
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Target Amount (Monthly)
$4,250
Start Date 01/01/2024 End Date None

Agentforce ⓘ

🏠 Miyazaki Household ⤢ ⌄

⬆ Upload Documents

Congratulations to the newest member of the Miyazaki Household! Welcome Ella Miyazaki.

Have a look and let me know if these records look good to add to the household account.

📅 Ella's Birth Life Eve... ⤢ ⌄
Client Notes
Ella's 529 Education
Created
2/18/2025, 9:14 AM
Details
Life Event: Birth of daughter, Ella Miyazaki
Source Document
Miyazaki 10/24/2024 Meeting Recording
Details Needed
Initial Contribution, Monthly Contributions, Target Amount, Target Date

Confirm   Edit   Delete

Amazing, yes, please, add them all.

Describe your task or ask a question...

Create Person Life Event

Agentforce For Financial Services: Banking Service Assistance

Your trusted autonomous agent for every service experience

Agentforce Financial Services - Service
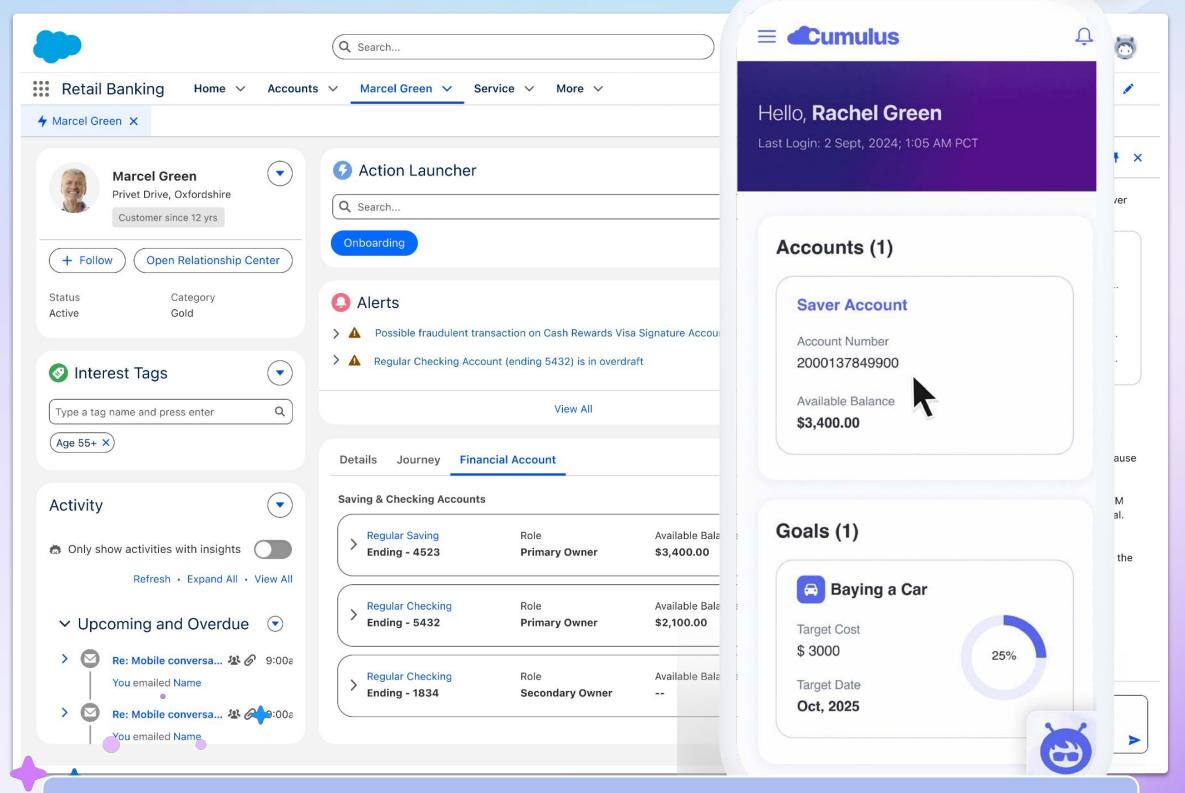
Get a headstart with a data model designed to meet the needs of your bank

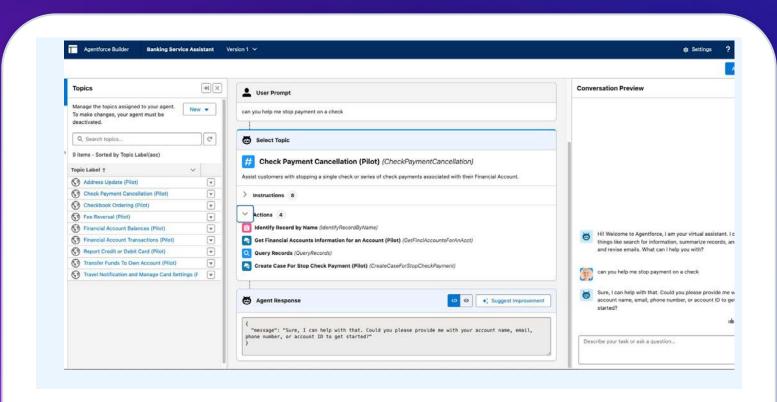Automate with pre-built banking workflows designed to help enforce compliance

Replace departmental silos with universal transparency

Institutionalize what makes your top CSRs successful with AI for banking in the flow of work

Make every interaction a defining moment

Agentforce Financial Services For Service Release

Agentforce Banking Service Assistance Enhancements

Deliver prompt, personalized banking service without overwhelming CSRs. Banking Service Assistance can now perform routine banking tasks, like disputes intake, end to end fee reversals and fund transfers, freeing your agents for complex tasks.

Service Innovation

Banking Service Assistance Agent
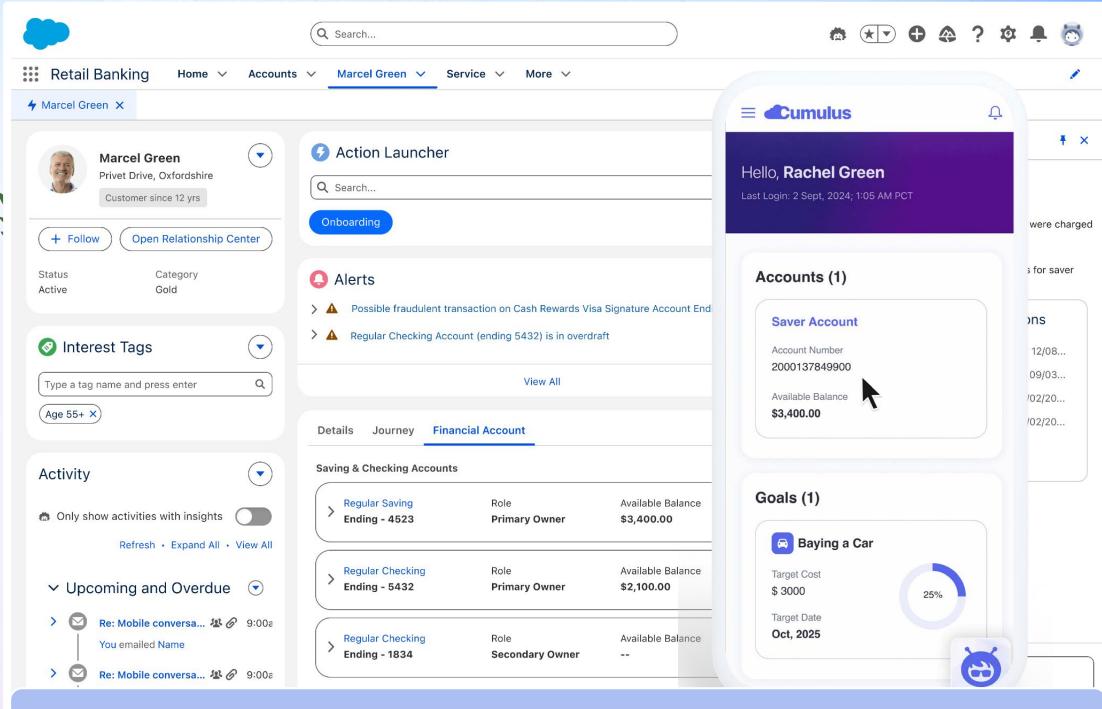
Interaction

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

Pull recent statements for Rachel and send a link to her via text.

Topics

7 New

Agent picks the right topic and follows the instructions

- Transfer Funds
- Transfer Disputes
- Change Billing Cycle
- Order Statement Copies
- Request Loan Payoff
- Reset PIN
- Lock/Unlock Card

Actions

13 New

1. Initiate Funds Transfer — 258
2. Collect Dispute Reason Code — 258
3. Get Lock/Unlock Card Settings — 258
4. Get Card Details — 258
5. Get Financial Accounts — 258
6. Get Loan Payoff Details — 258
7. Fee Reversal Fulfillment — 258
8. And more… — 258

Agent enriches actions

- CRM
- Data Cloud
- External
- User Input

Outcome

- Faster resolution times & more personalized service
- Improved customer satisfaction and retention
- Cost savings through case deflection
- More efficient customer service teams and reduced case handling time

Einstein Trust Layer

Topic: End-to-End Fee Reversal

Automate the fee reversal process, freeing up your middle and back office teams for higher-value work

salesforce

Banking Service Assistant   Version 1 ⌄

⚙ Settings

ned to your agent.
agent must be

New ▾

ic Label(asc)

⟳

ᵥ

ilot)
ncellation (Pilot)
g (Pilot)

Balances (Pilot)
Transactions (Pilot)
ebit Card (Pilot)
Own Account (Pilot)
and Manage Card Settings (F

▸ Session Start

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

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

⌄ "i need to reverse a fee"   Plan ID: e5ca5d5f83d5

👤 User Prompt

i need to reverse a fee

🤖 Select Topic

Fee Reversal (Pilot) *(FeeReversal)*

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

▸ Instructions   10

▸ Actions   4

🤖 Agent Response   ⟨⟩ 👁   ✦ Suggest Improvement

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

Conversation Preview

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

🙂 i need to reverse a fee

🤖 Sure, I can help with that. Could you please provide n account ID or customer nam to g arted?

Describe your ta

Reverse a Fee in a Single Call

Actions

Resolve customer fee inquiries with first-call resolution. AgentForce equips CSRs to process a full fee reversal within a single interaction by automatically screening the customer's profile against company's business rules. This determines customer eligibility instantly, eliminating the need for escalations to MIBO teams.

New
Fee Reversal Fulfillment

Fee Reversal Intake

Display Real-Time Accounts And Balances
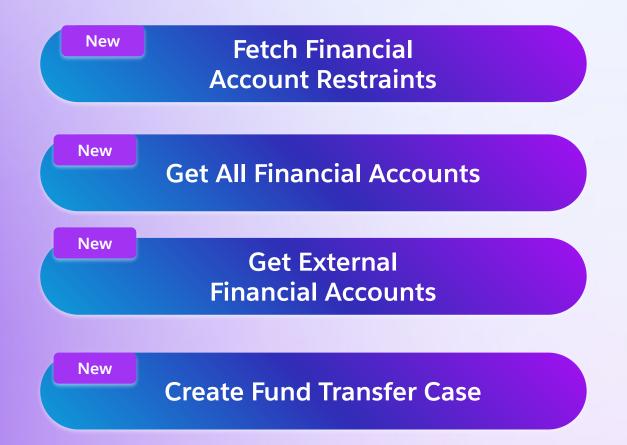
Topic: Transfer Funds
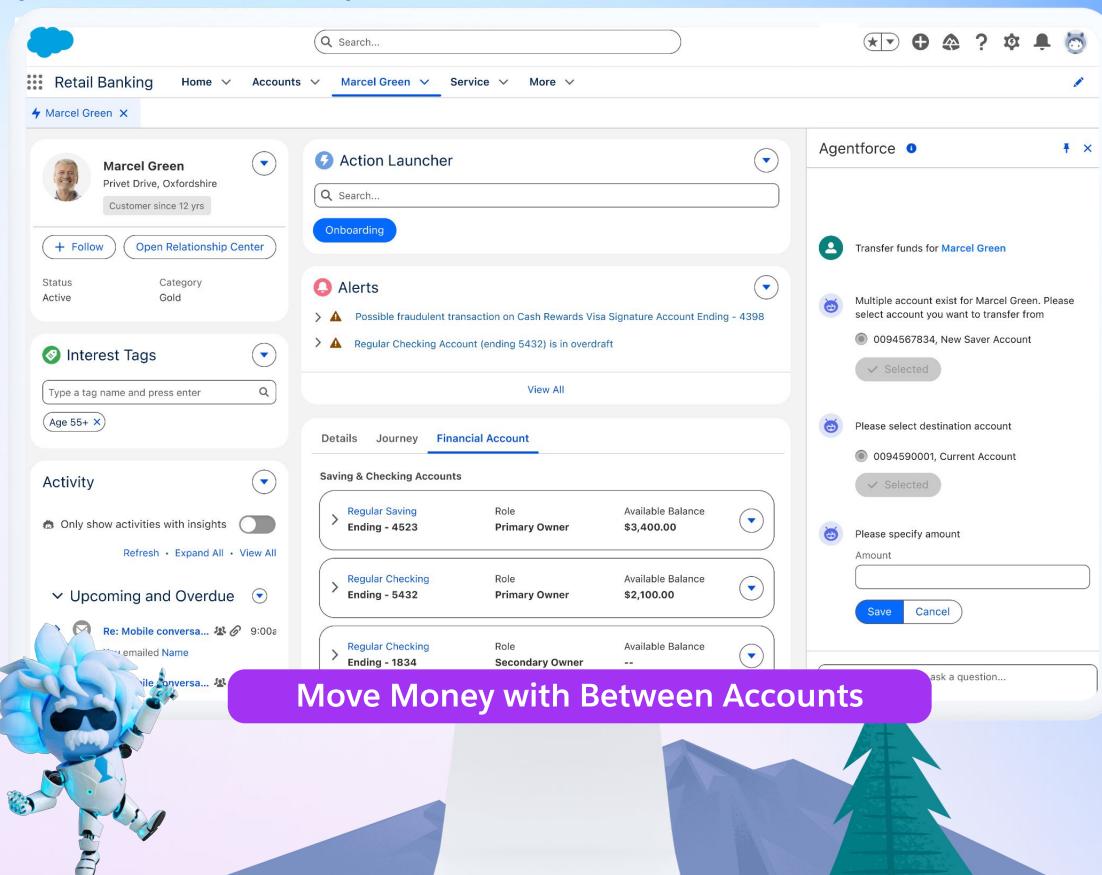
Make fund transfers straightforward for both your customers and your CSRs.

salesforce

Actions
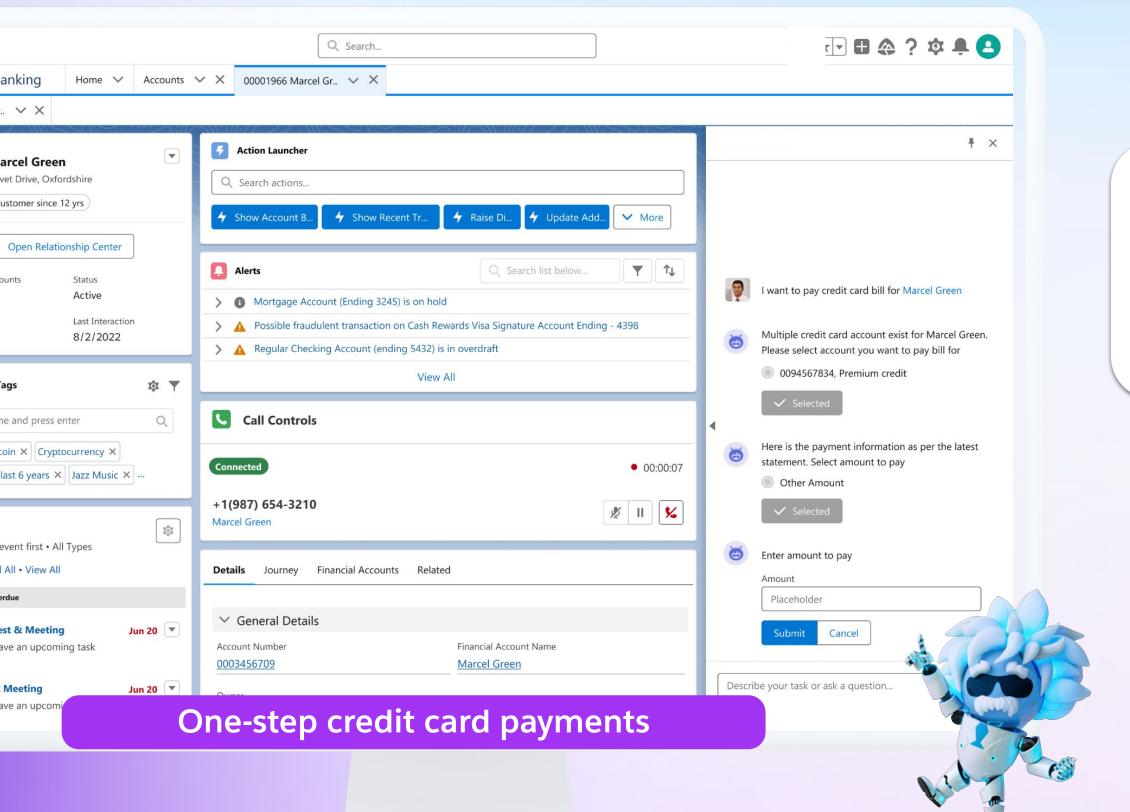
CSRs can handle a customer's request to move money to an internal or external account with a simple instructions to their Banking Service Assistance, getting the job done quickly and accurately.

New — Fetch Financial Account Restraints

New — Get All Financial Accounts

New — Get External Financial Accounts

New — Create Fund Transfer Case

Move Money with Between Accounts

Topic: Credit Card Bill Payment
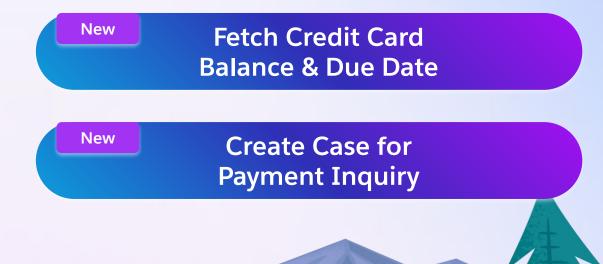
Set up and adjust credit card payments in seconds

salesforce

Actions

Turn complex billing questions into simple, one-step solutions. Instantly process payments, adjust due dates, and resolve inquiries in seconds with a simple conversational command.

New Fetch Credit Card Balance & Due Date

New Create Case for Payment Inquiry

One-step credit card payments

Topic: Loan Payment
Simplify complex loan payments into one easy step

salesforce
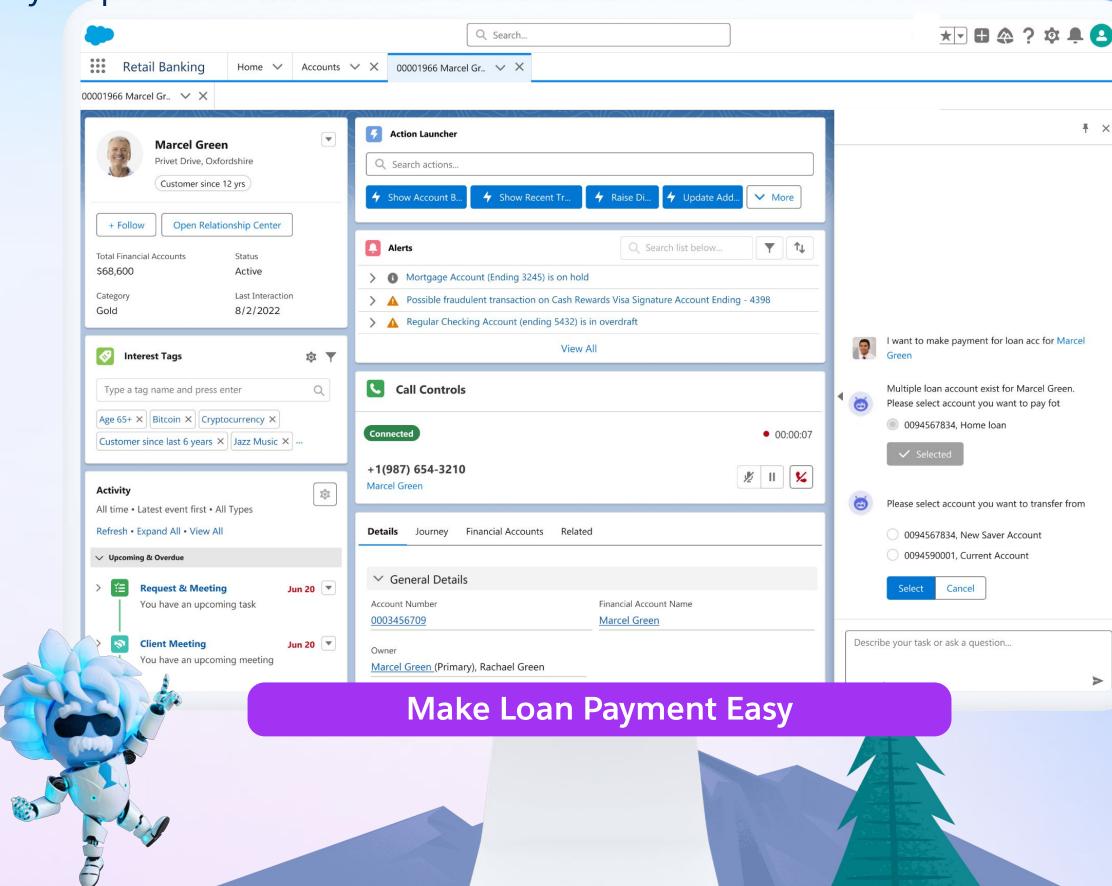
Actions

Make loan payments effortless for your CSRs and customers. This capability transforms a traditionally complex process into a single, straightforward action, allowing agents to schedule or modify loan payments in seconds via a natural language conversation.
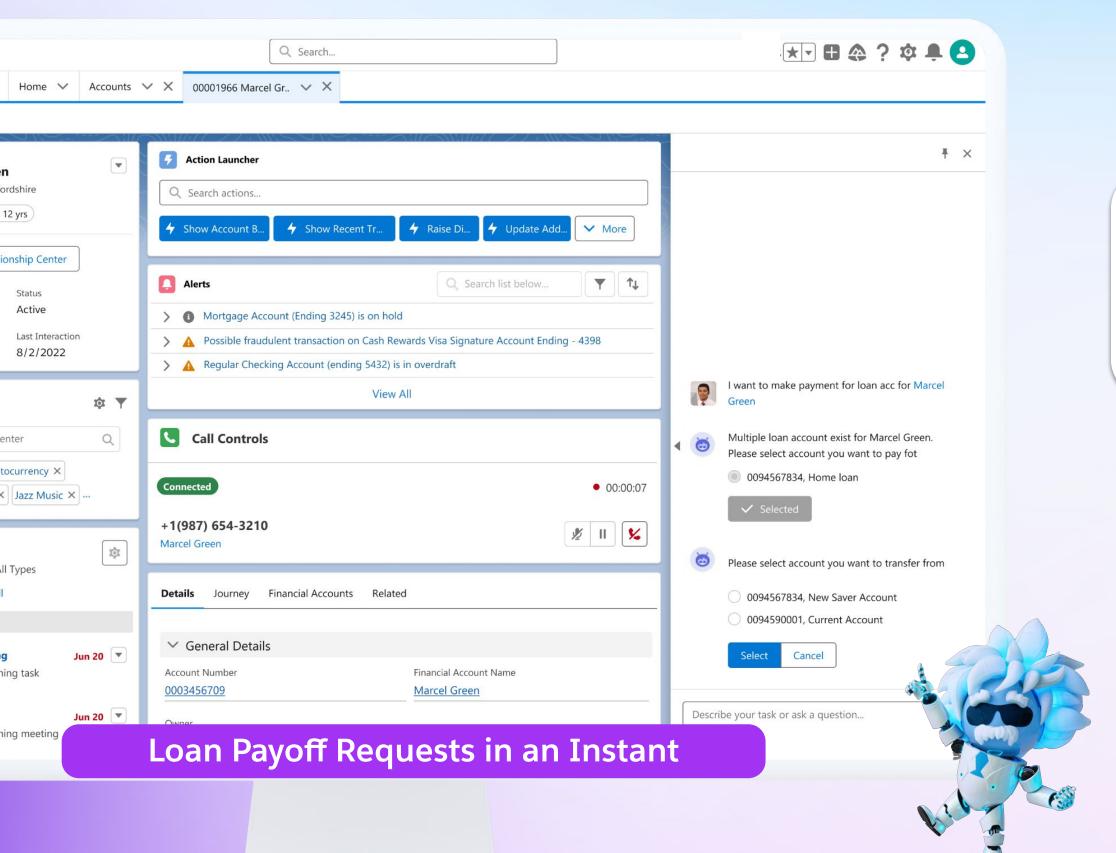
New   Retrieve Current Loan Payment Amount & Due Date

New   Create a Case for Loan Payment

Make Loan Payment Easy

Topic: Loan Payoffs

Simplify the high-stakes process of a loan payoff

Actions

Equip your CSRs with the ability to generate accurate payoff statements with a simple request, dramatically reducing handling time and ensuring a smooth customer experience.

New **Create a Case for a Loan Payoff Request**
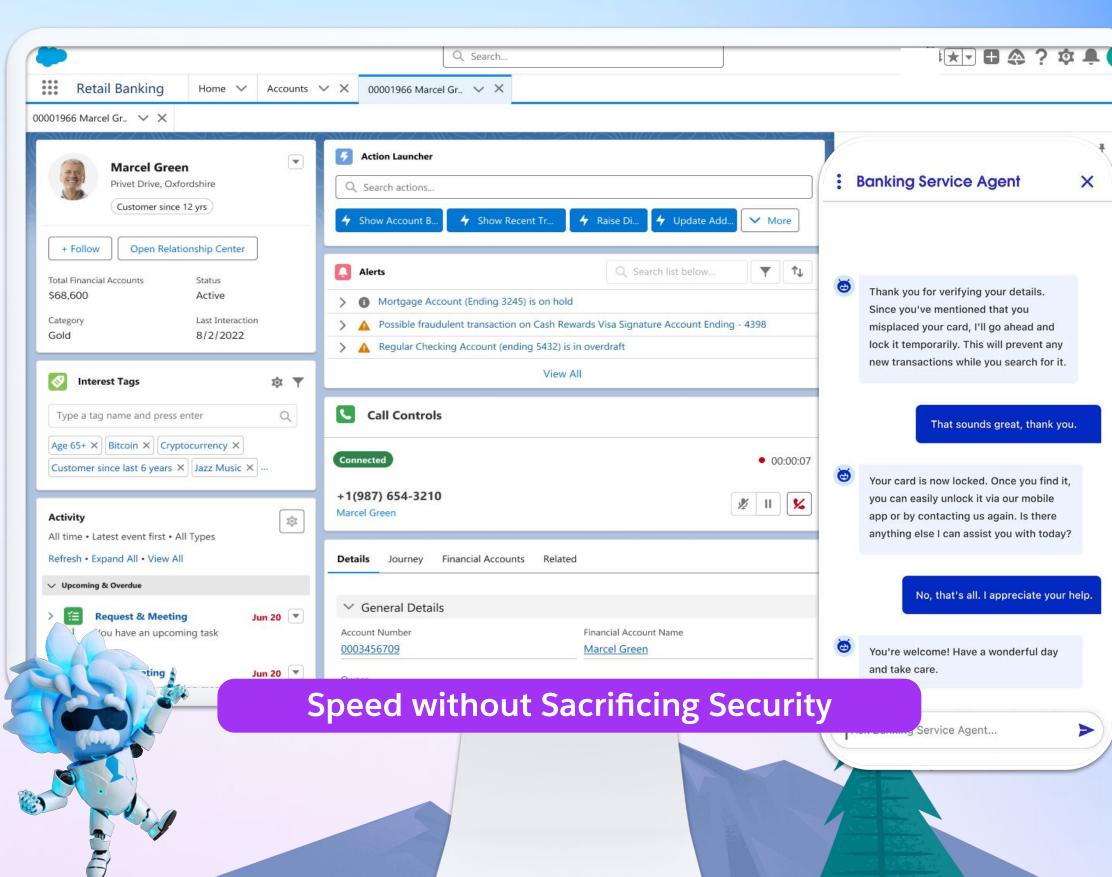
Loan Payoff Requests in an Instant
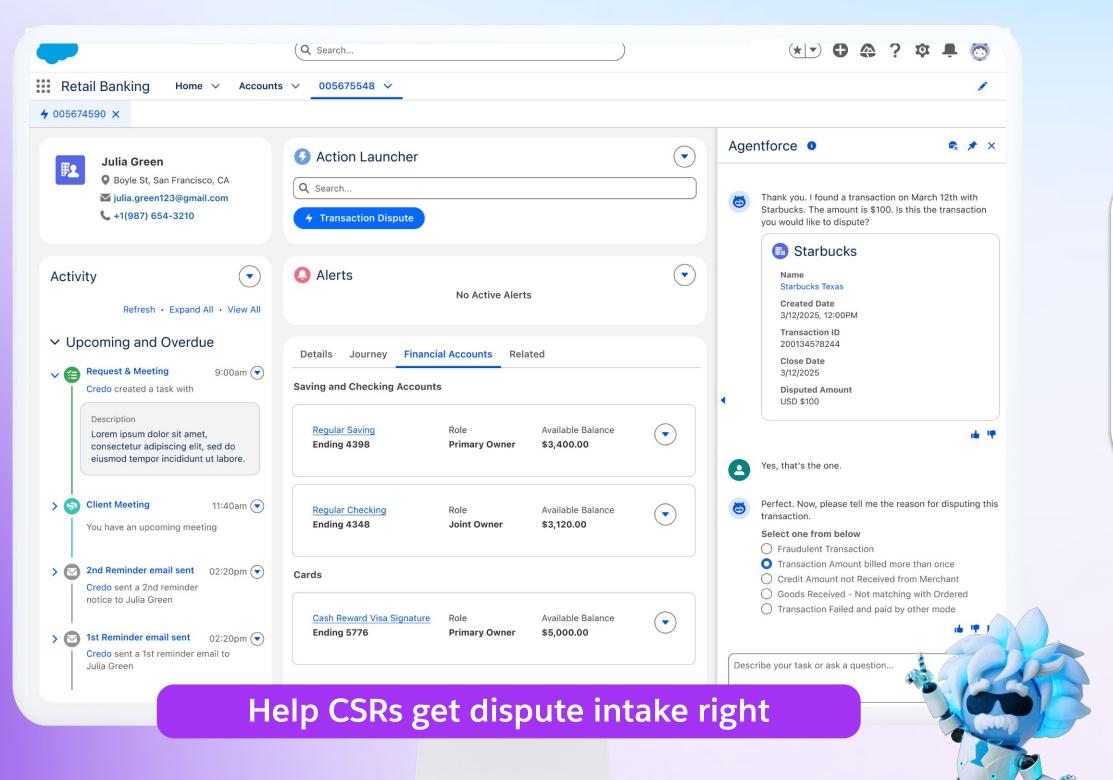
Topic: Transaction Dispute Intake

Ensure every dispute is handled with precision

Actions

Free your CSRs to focus on the customer, not intake forms. When a dispute is initiated via natural language, our Banking Service Assistance automates manual transaction dispute intake. This guides a compliant, error-free workflow, giving your agents the space to deliver superior service that builds unshakable customer trust

New
Collect Dispute Details with a Guided Script

New
Automate Creation of the Case, Dispute, and Items

Help CSRs get dispute intake right

Topic: Card Security
Give customers instant control and peace of mind

salesforce
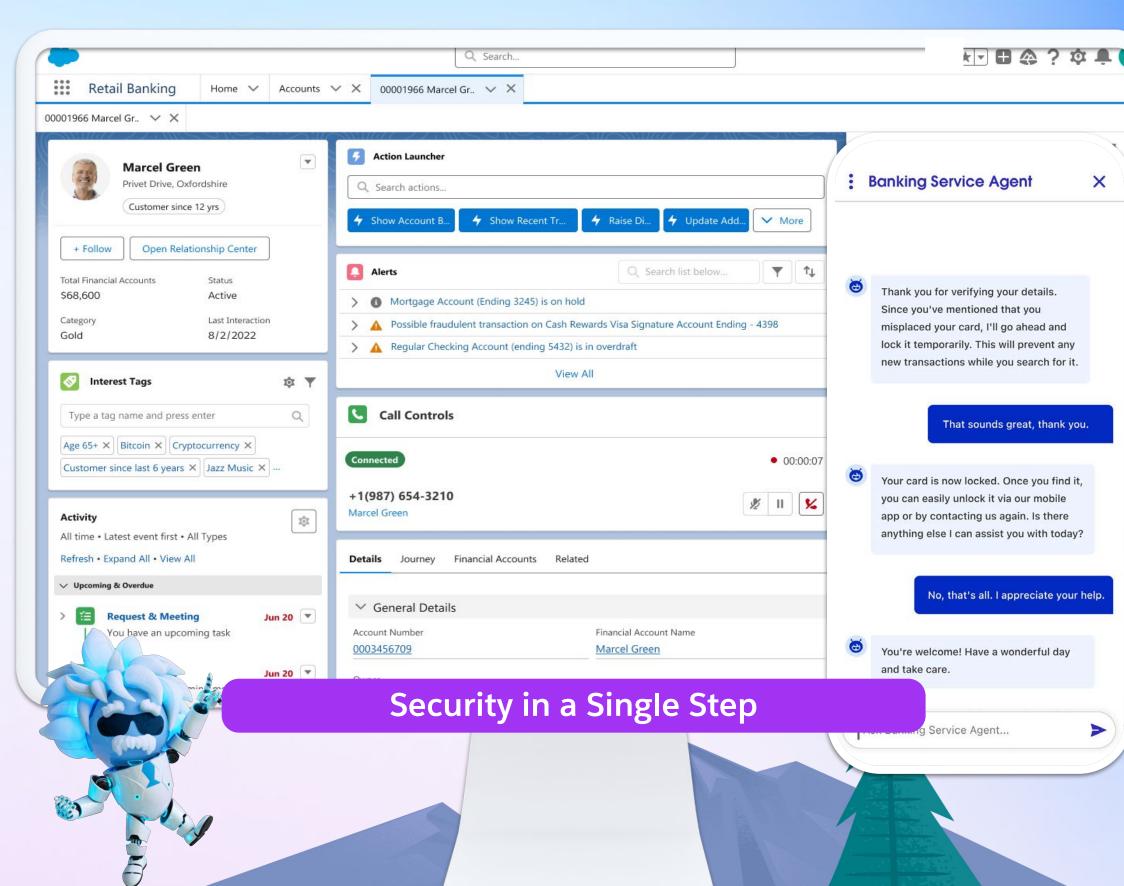
Actions

Allow CSRs to immediately lock a compromised card or unlock it for a customer, resolving urgent security issues in a single step.

New
Get Current Settings for All Customer's Cards
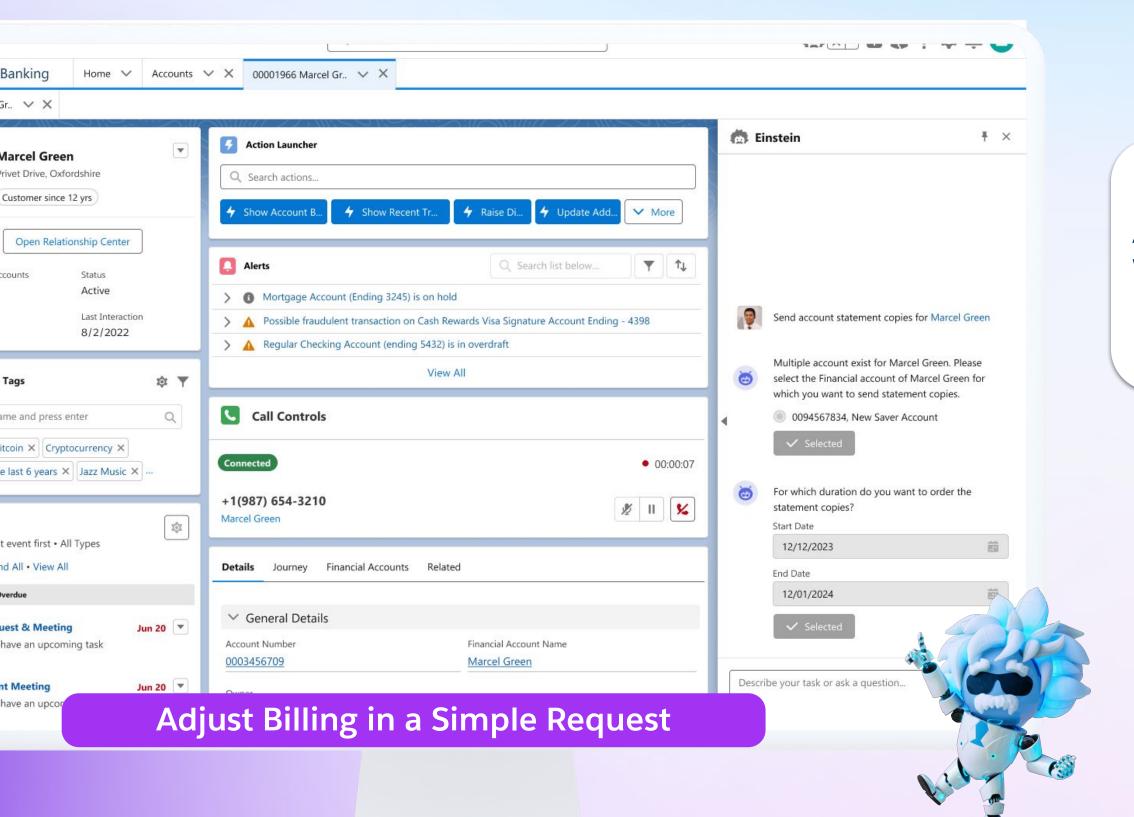
New
Create a Case to Instantly Lock or Unlock a Card

Security in a Single Step

Topic: Statement Services

Provide on-demand service without the wait
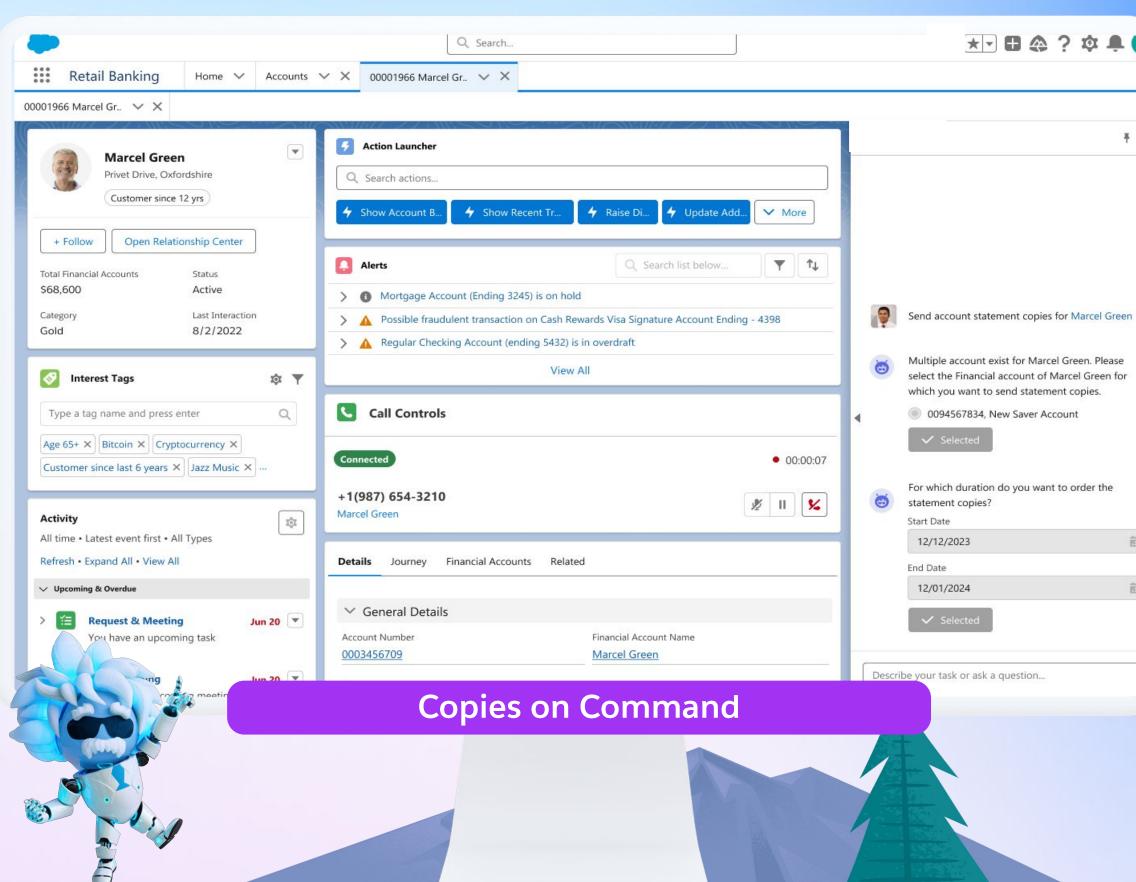
Actions

CSRs can instantly pull and deliver account statements for any date range, turning a routine request into an opportunity to showcase the bank's efficiency.

New

Fetch & Confirm Customers Email Address

New

Create a Case to Order Statement Copies

Copies on Command

Agentforce For Financial Services: Collections Assistance

Agentforce Financial Service's First OOTB Customer-Facing Agent!

Become an *Agentic Enterprise* with

Collections Customer Assistance

salesforce

Improve the Borrower Experience
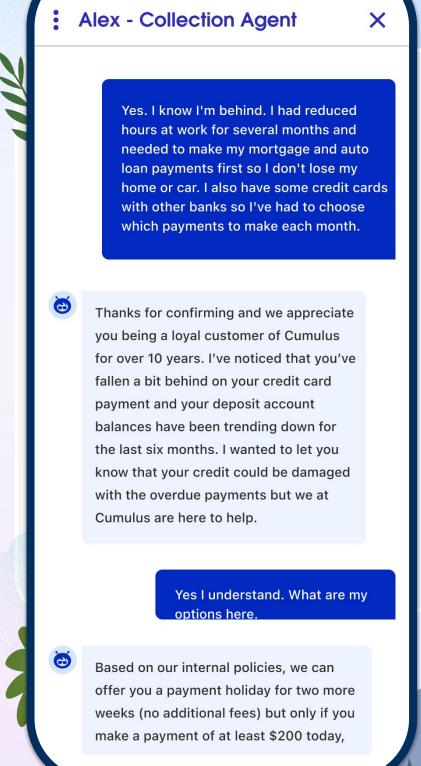
24/7 AI agents offer instant, policy-grounded answers for collections account details and payment options, fostering customer self-service and prompt resolution.
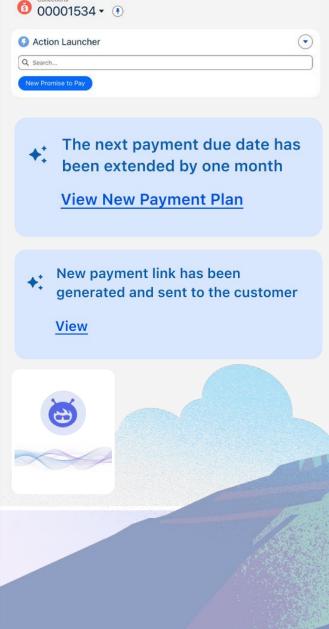
Drive Down the Cost to Collect

Automate routine collections interactions and enable proactive, digital-first outreach,deflecting calls and significantly improving early-stage collection efficiency.

Automate Work, Lead with Empathy

Free human collections specialists from manual work and routine inquiries, allowing them to apply their expertise and empathy to high-value, sensitive collections scenarios.
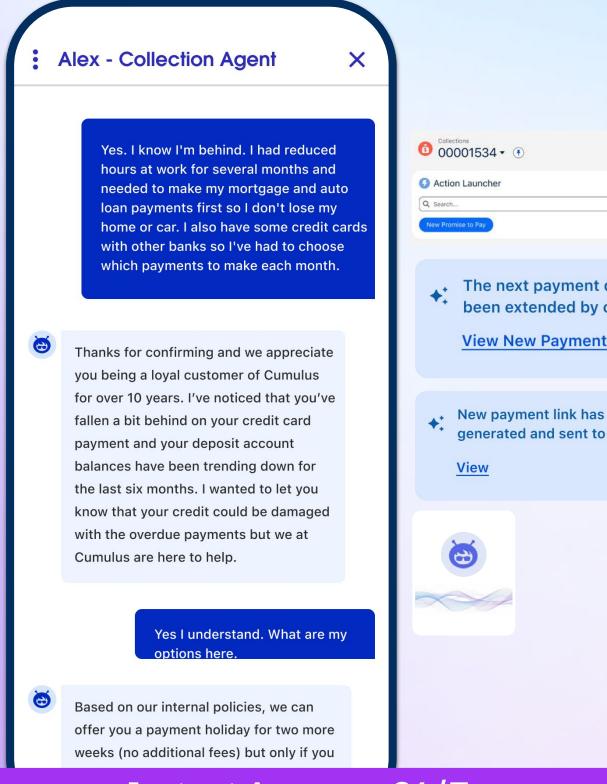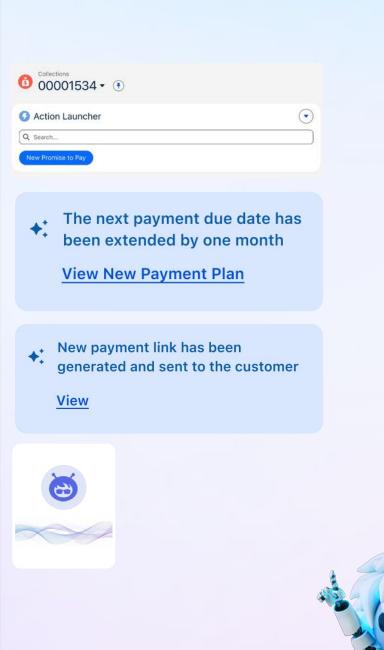
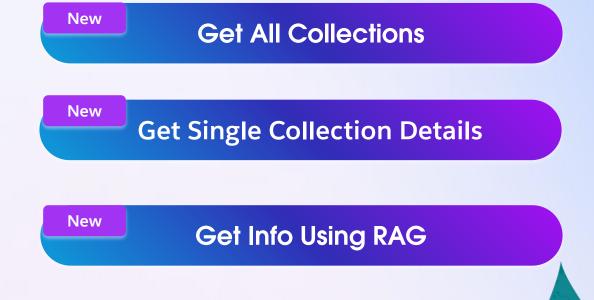**Alex - Collection Agent**

Yes. I know I'm behind. I had reduced hours at work for several months and needed to make my mortgage and auto loan payments first so I don't lose my home or car. I also have some credit cards with other banks so I've had to choose which payments to make each month.

Thanks for confirming and we appreciate you being a loyal customer of Cumulus for over 10 years. I've noticed that you've fallen a bit behind on your credit card payment and your deposit account balances have been trending down for the last six months. I wanted to let you know that your credit could be damaged with the overdue payments but we at Cumulus are here to help.

Yes I understand. What are my options here.

Based on our internal policies, we can offer you a payment holiday for two more weeks (no additional fees) but only if you make a payment of at least $200 today,

Collections
00001534

Action Launcher

Search...

New Promise to Pay

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

Powered by **Agentforce**

Topic: FAQ

Let digital agents handle common collections questions, freeing human agents for complex issues.

Alex - Collection Agent

Yes. I know I'm behind. I had reduced hours at work for several months and needed to make my mortgage and auto loan payments first so I don't lose my home or car. I also have some credit cards with other banks so I've had to choose which payments to make each month.

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Yes I understand. What are my options here.

Based on our internal policies, we can offer you a payment holiday for two more weeks (no additional fees) but only if you

Instant Answers, 24/7

Collections
00001534

Action Launcher

Search...

New Promise to Pay

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

Actions

Deliver 24/7 self-service and scale operations with an intelligent digital AI agent that handles the most common borrower inquiries, freeing human agents for complex negotiations.

New **Get All Collections**

New **Get Single Collection Details**

New **Get Info Using RAG**

Become an *Agentic Enterprise* with

Collections Employee Assistance

salesforce

AI with Collections Expertise
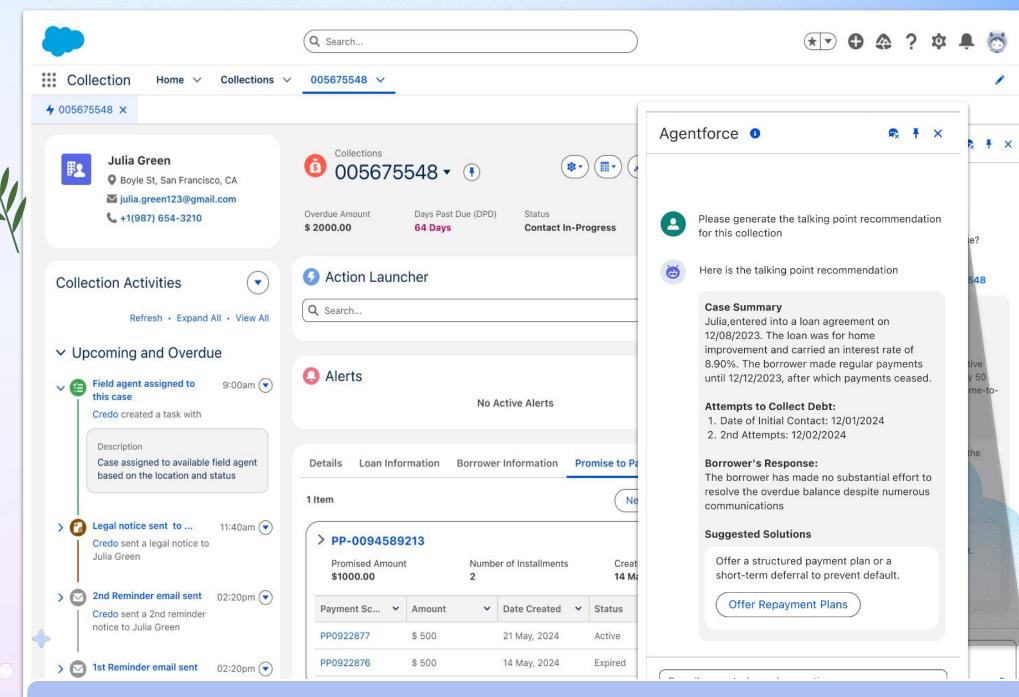
Agents are pre-trained on delinquency stages, promise-to-pay rules, and business rules, speaking the language your collections and recovery teams use every day

Automate Work, Maximize Recovery

AI handles the manual work like capturing promises and payments, freeing collections specialists to focus on negotiation and successful recovery

Institutionalize Collections Knowledge

Arm your collections team with auto-generated talking points, real-time insights, and next-best-action suggestions to drive greater recovery success.

Powered by **Agentforce**

Automate the routine and humanize the relationship

Collections Employee Assistance In Action

salesforce

Interaction
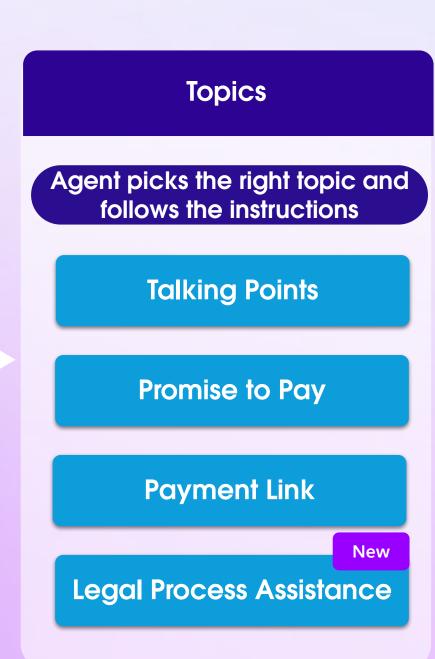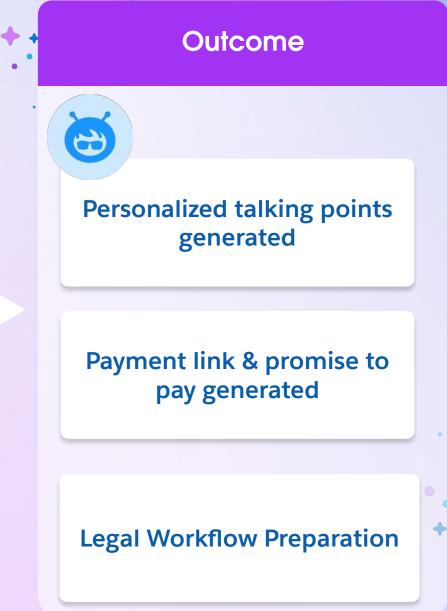
I'm Agentforce, your trusted AI agent.

Help me initiate a promise to pay.

Topics

Agent picks the right topic and follows the instructions

Talking Points

Promise to Pay

Payment Link

Legal Process Assistance
New

Actions

1. Generate Talking Points
2. Generate Payment Link
3. Create Promise to Pay **258**
4. Update Attorney Details **258**
5. Initiate Legal Workflow **258**

Agent enriches actions with your data

CRM

Data Cloud

External

User Input

Outcome

Personalized talking points generated

Payment link & promise to pay generated

Legal Workflow Preparation

Einstein Trust Layer

Topic: Promise to Pay

Formalize commitments and collect payment with a single command

salesforce

Actions

Turn verbal commitments into successful payments. Collections Assistance instantly captures a borrower's promise-to-pay, documents the details, and automates follow-up reminders to ensure agreements are fulfilled with minimal manual effort.

005674590 ✕

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

Collections
005674590 ▾

Overdue Amount
$ 2000.00

Days Past Due (DPD)
64 Days

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

Action Launcher
Search...

Alerts
No Active Alerts

0000001296 · Published · Newsletter
Last modified: 10/5/2020

Details Loan Information Borrower Information Relat

Loan Plan (1)

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

Commitment to Payment

Payment Commitment

New **Create Promise to Pay**

Payment Collection

Topic: Legal Workflow Support

Automate manual legal activities and check for legal-readiness with ease

salesforce

Actions
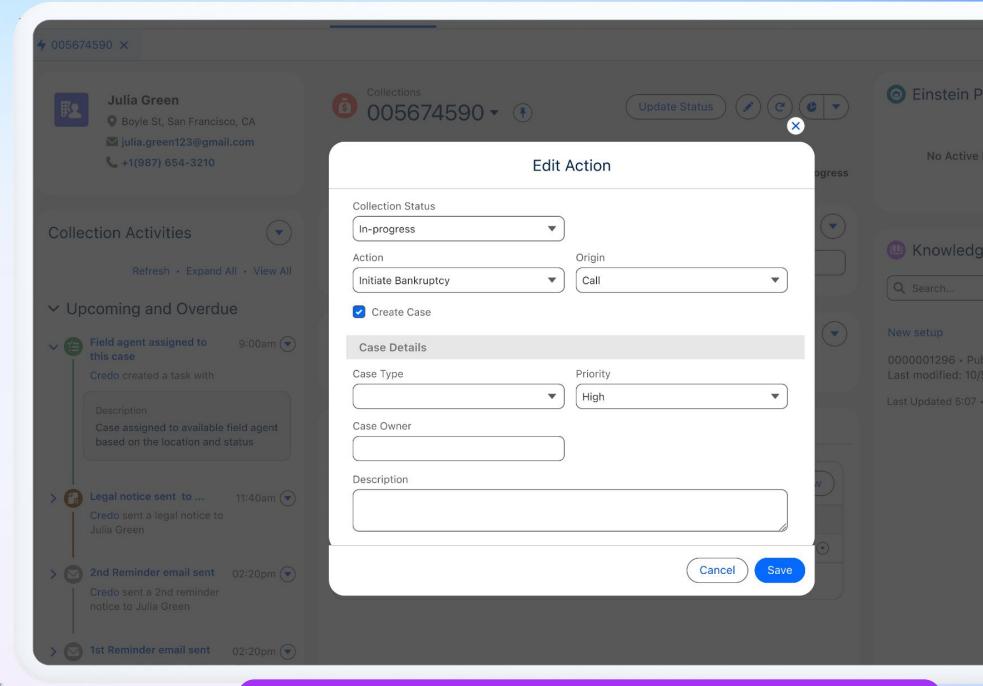
Turn manual legal processes into simple, automated tasks. Allow collections agents to instantly assess a case and documentation for legal readiness and prepare for handoff to a legal team

New **Financial Account Linked to Collection Plan**

New **Borrower Contact Details from External Sources**

New **Update Attorney Contact Details**

Review for Legal Action Readiness

Documentation for Legal Case Initiation

⚡ 005674590 ✕

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

Collections
005674590 ⌄   ⚡   Update Status

Einstein P

No Active

Collection Activities   ⌄

Refresh · Expand All · View All

Knowledg

Search...

⌄ Upcoming and Overdue

New setup

Field agent assigned to   9:00am ⌄
this case
Credo created a task with

Description
Case assigned to available field agent
based on the location and status

0000001296 - Pul
Last modified: 10/8

Last Updated 5:07

> 🔒 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 ⌄

Edit Action   ✕

Collection Status
In-progress   ▾

Action   Origin
Initiate Bankruptcy ▾   Call   ▾

☑ Create Case

Case Details

Case Type   Priority
                    ▾   High   ▾

Case Owner

Description

Cancel   Save

Automated Support for Legal Activities

Agentforce For Financial Services: Insurance Service Assistance

Your trusted agent for every insurance service experience

Insurance Service Assistance In Action
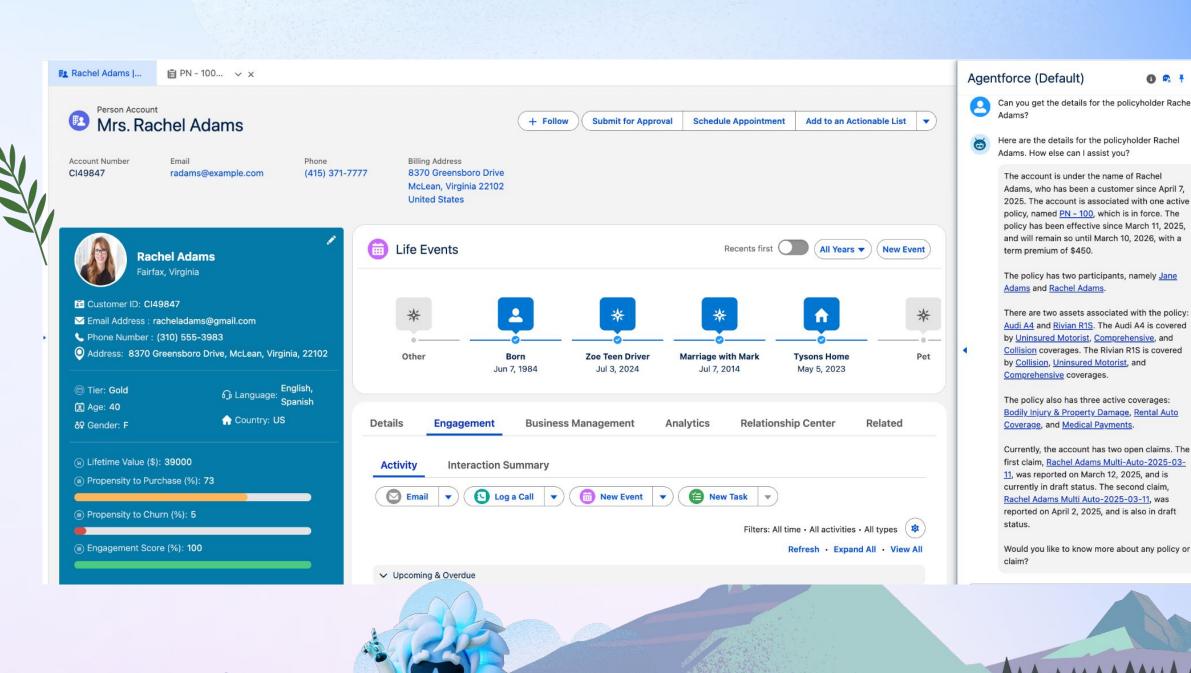
salesforce

Interaction

I'm Agentforce, your trusted AI agent.

Please summarize policyholder details

Please summarize quote details of policyholder

258

Please provide proof of insurance

Topic(s)

Agent picks the topic and follows the instructions

Insurance Summarization

258

Policy Servicing

Action(s)

1. Get Policyholder Details

2. Get Quote Details

258

3. Generate Proof of Insurance

Agent enriches actions with your data

- CRM
- Data Cloud
- External
- User Input

Outcome

Detailed policyholder summary

Detailed quote summary

258

Proof of insurance
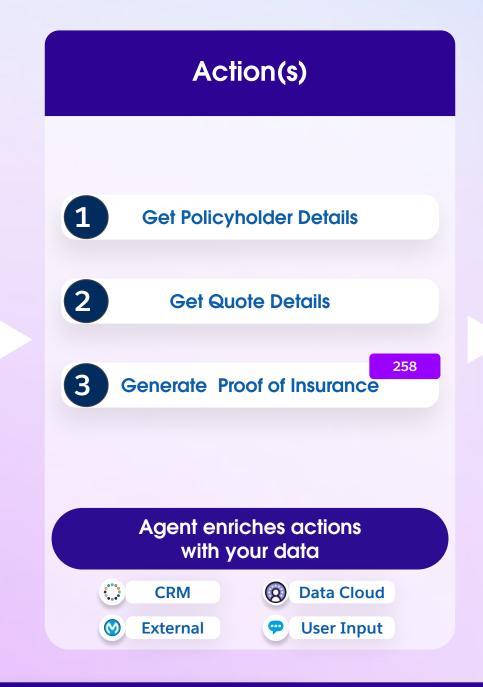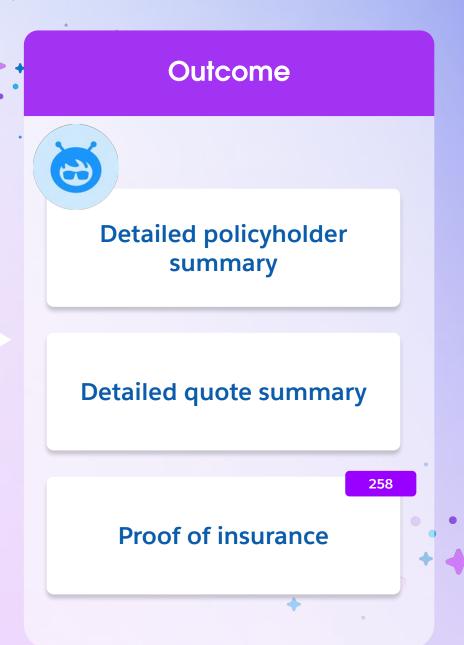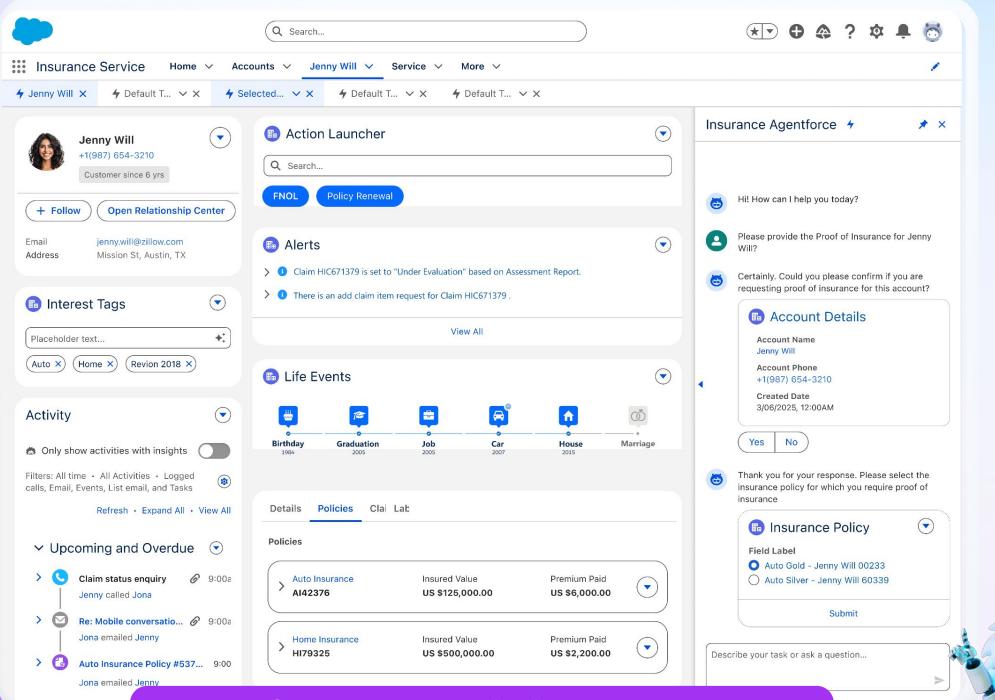
Einstein Trust Layer

Topic: Policy Servicing

Proof of Insurance

Insurance contact center reps face long handle times and complex systems. The Insurance Service Assistant now guides representatives through the process of producing proof of insurance – reducing effort, speeding resolution, and improving customer satisfaction.

Actions:

New

Generate Proof of Insurance

Generate Proof of Insurance
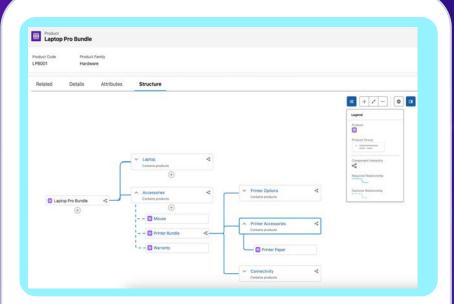
Digital Insurance Enhancements

Claims Management
Group Benefits
Policy Admin Enhancement

GA | Oct. 21, 2025

salesforce
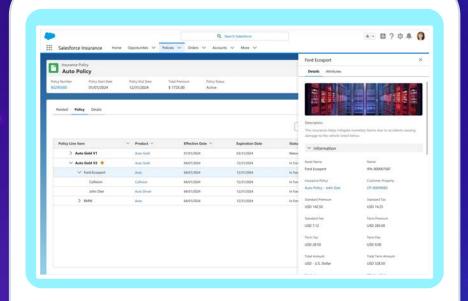
Digital Insurance Products
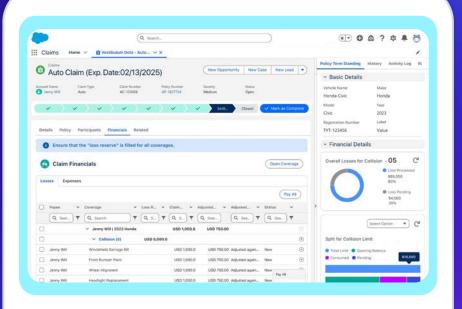
Digital Insurance Foundation

Modernize your insurance with Digital Insurance: Unify systems, personalize experiences, and improve efficiency. Launch products fast, scale easily, and build strong policyholder relationships.
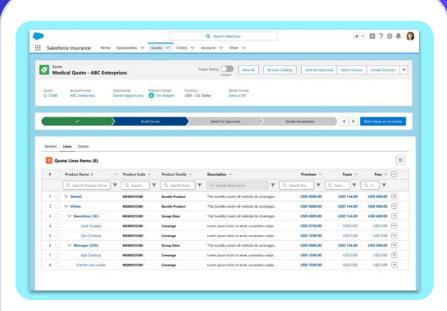
Policy Administration

Manage the entire policy lifecycle–from quoting and issuance to billing and renewals–on a single, customer-centric platform to improve efficiency and agility with Policy Administration.

Claims Management

Revolutionize claims with Salesforce: deliver fast, personalized experiences, eliminate silos, automate routine tasks, and boost efficiency, all while driving customer loyalty and profitable growth.

Group Benefits

Accelerate the launch of group benefits products and simplify the management of the entire policy lifecycle, from quoting and enrollment to policy issuance, through a configurable and centralized platform.

Digital Insurance Platform

Digital Insurance

Accelerate Business Innovation and Time-to-Market

salesforce
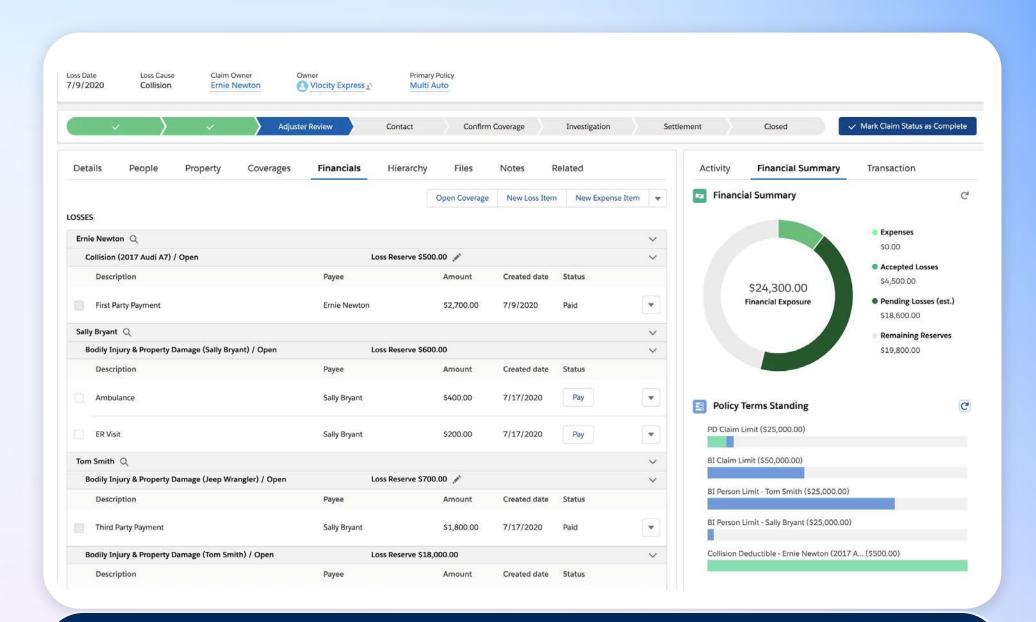
Automate routine tasks and drive straight-through processing with intelligent automation

Unify the insurance value chain on a single platform to accelerate innovation and growth.

Deliver personalized experiences that enhances policyholder experiences

Loss Date	Loss Cause	Claim Owner	Owner	Primary Policy
7/9/2020	Collision	Ernie Newton	Vlocity Express	Multi Auto

Adjuster Review | Contact | Confirm Coverage | Investigation | Settlement | Closed | Mark Claim Status as Complete

Details | People | Property | Coverages | **Financials** | Hierarchy | Files | Notes | Related

Activity | **Financial Summary** | Transaction

Open Coverage | New Loss Item | New Expense Item

LOSSES

Ernie Newton

Collision (2017 Audi A7) / Open   Loss Reserve $500.00

Description	Payee	Amount	Created date	Status
First Party Payment	Ernie Newton	$2,700.00	7/9/2020	Paid

Sally Bryant

Bodily Injury & Property Damage (Sally Bryant) / Open   Loss Reserve $600.00

Description	Payee	Amount	Created date	Status
Ambulance	Sally Bryant	$400.00	7/17/2020	Pay
ER Visit	Sally Bryant	$200.00	7/17/2020	Pay

Tom Smith

Bodily Injury & Property Damage (Jeep Wrangler) / Open   Loss Reserve $700.00

Description	Payee	Amount	Created date	Status
Third Party Payment	Sally Bryant	$1,800.00	7/17/2020	Paid

Bodily Injury & Property Damage (Tom Smith) / Open   Loss Reserve $18,000.00

Description	Payee	Amount	Created date	Status

Financial Summary

$24,300.00 Financial Exposure

- Expenses $0.00
- Accepted Losses $4,500.00
- Pending Losses (est.) $18,600.00
- Remaining Reserves $19,800.00

Policy Terms Standing

PD Claim Limit ($25,000.00)

BI Claim Limit ($50,000.00)

BI Person Limit - Tom Smith ($25,000.00)

BI Person Limit - Sally Bryant ($25,000.00)

Collision Deductible - Ernie Newton (2017 A... ($500.00)

Preconfigured Solutions for Secured and Unsecured Loans

Policy Admin Enhancement - Out of Sequence Endorsement

Auto Apply Changes to all policy versions

Out of Sequence Transaction Calculation

Dedicated APIs and Invocable actions

- **Process backdated** policy changes across terms
- **Automate change** application on all policy versions
- **Provide customers flexibility** for corrections or additions.

Digital Lending Enhancements
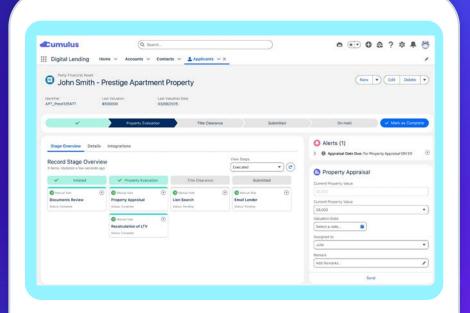
Digital Lending Enhancements

Collateral Management

Support end-to-end processes for secured loans, by performing ownership and lien checks, validate collateral against loan policies, and accurately track the asset's lendable value for better efficiency and compliance

Stage Management

Stage management provides a clear, visual way to track the progress of a loan application process. This feature has been enhanced to be available in Experience Cloud, allowing users like brokers and agents to monitor progress.
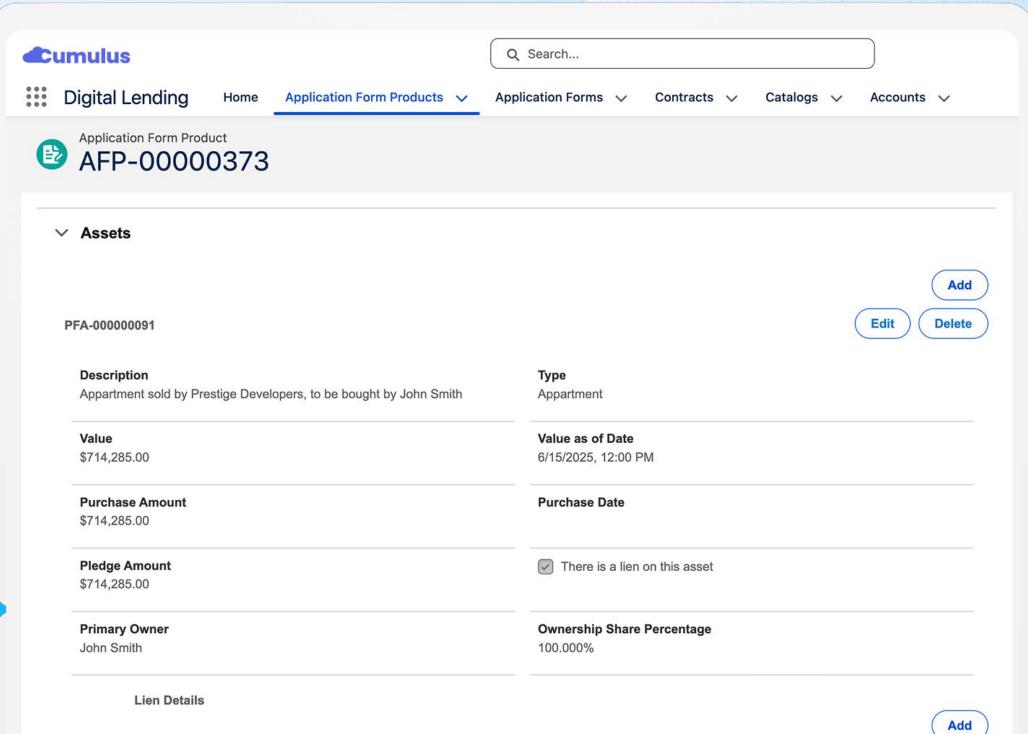
Digital Lending Innovation

Collateral Management Enhancements

Comply with loan policies

- **Enhanced collateral data** model for secured loan processes
- **Validate collateral,** track lendable value, and monitor liens
- Supports physical assets (property and vehicles), group of assets (group of buildings) and financial assets (stocks, bonds and others)
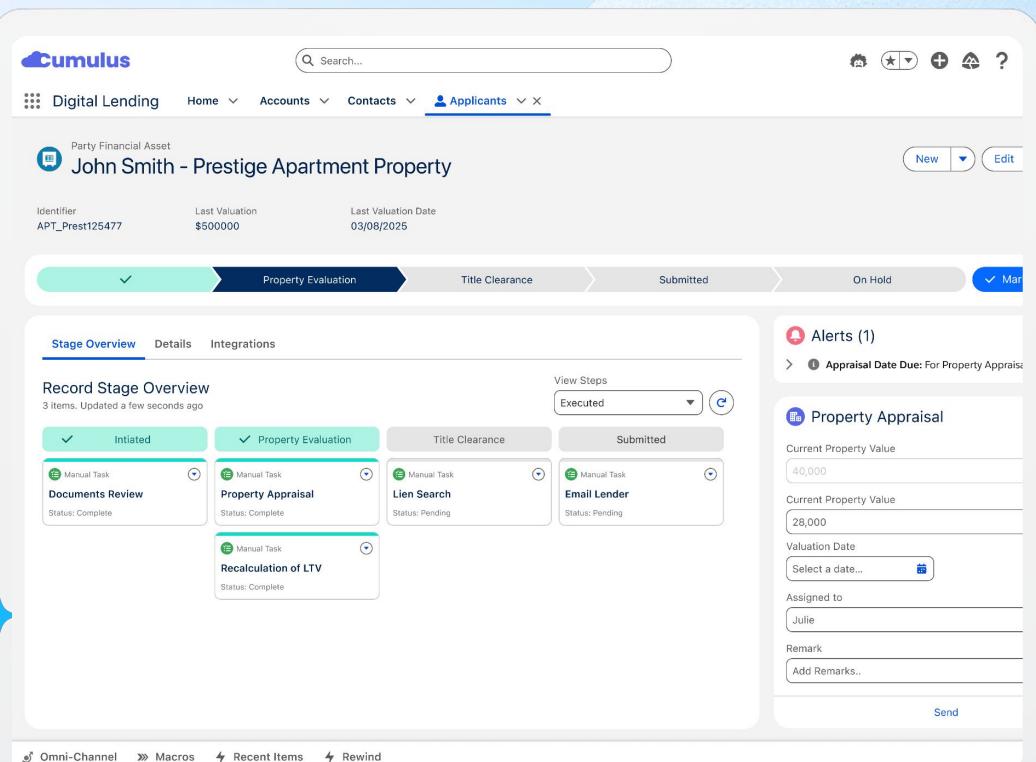
New Collateral Data Model

Perform ownership & lien checks

Stage Management Enhancements

Extend Stage Management to External Users

Enhanced User Experience

Track Progress on a Unified Platform

- Record stage overview component available in Experience Cloud
- Users, including brokers and agents, can now track process progress outside of CRM
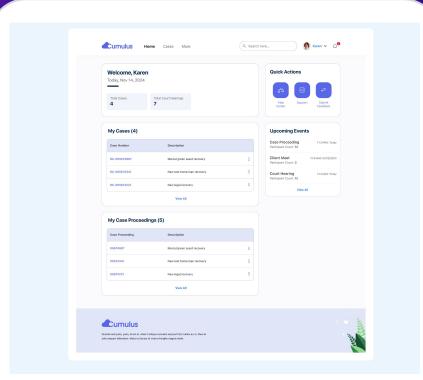- Drive greater user adoption and efficiency with the intuitive design that provides better readability

Collections Enhancements
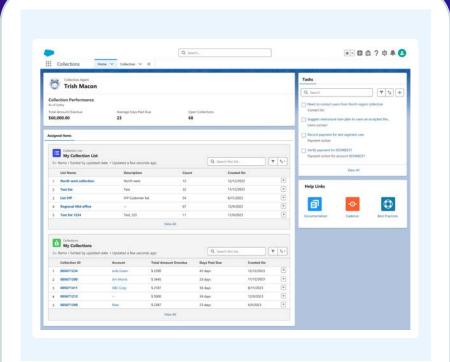
Collections & Financial Recovery product enhancements

salesforce

Collections Product Enhancements

What's new Launching Oct '25
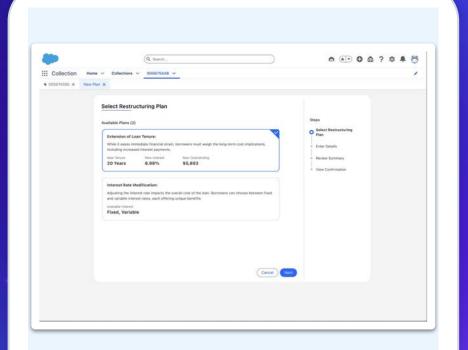
Roadmap

Templates for Legal Correspondence

Accelerate the collections process with legal considerations by generating accurate correspondence templates to support legal processes.
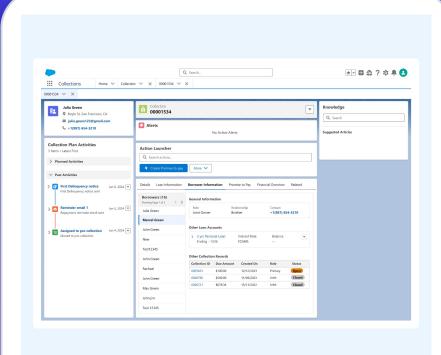
Intelligent Collections Case Prioritization

Use AI to automatically score and prioritize cases, allowing collections team to focus on the most recoverable accounts first, significantly increasing overall recovery rates and efficiency.

Payment Restructuring

Allow agents to resolve accounts faster by easily restructuring payment terms within pre-defined company policies, ensuring both customer flexibility and adherence to business guidelines

Consolidated Collections

Eliminate screen switching by providing agents with a 360-degree view of all outstanding collection accounts in a single, unified console, enabling faster and more informed decisions.

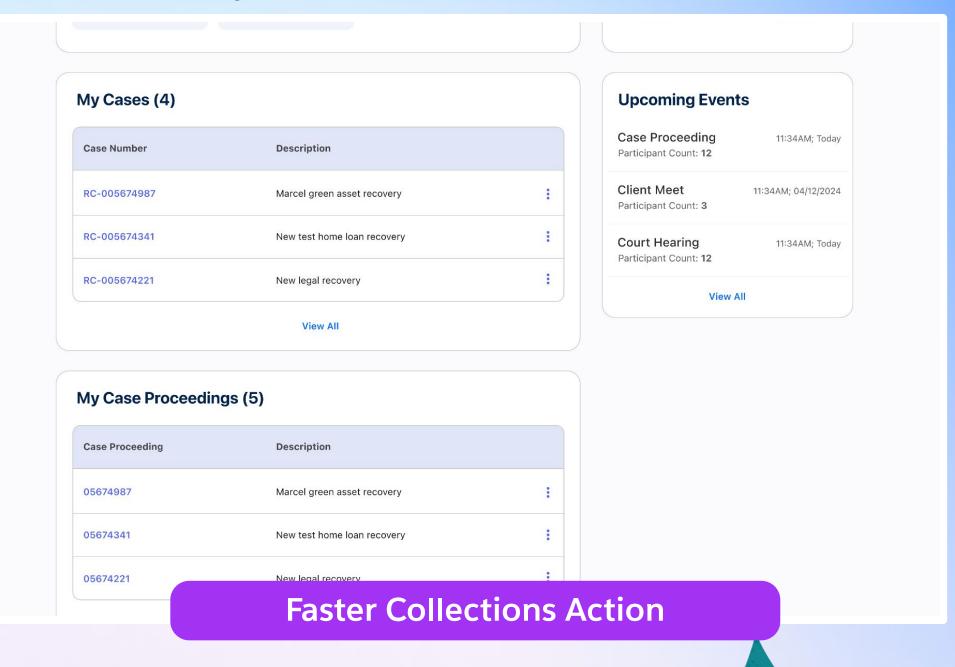## Collections & Financial Recovery Innovation

Templates for Legal Correspondence

Instantly generate collections communications from pre-built, dynamic templates
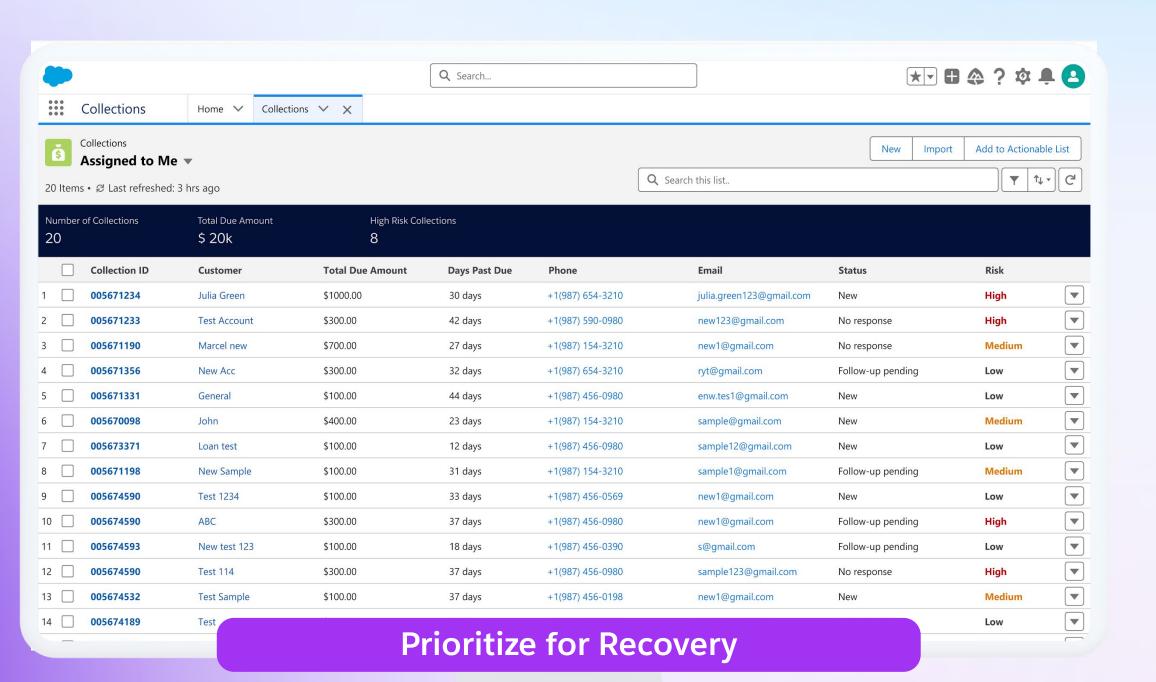
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Automated Collections Support

A library of pre-approved templates for collections-related communications enables the instant generation of accurate letters designed to support compliance right from the collections case.

My Cases (4)

Case Number	Description	
RC-005674987	Marcel green asset recovery	⋮
RC-005674341	New test home loan recovery	⋮
RC-005674221	New legal recovery	⋮

View All

My Case Proceedings (5)

Case Proceeding	Description	
05674987	Marcel green asset recovery	⋮
05674341	New test home loan recovery	⋮
05674221	New legal recovery	⋮

Upcoming Events

Case Proceeding   11:34AM; Today
Participant Count: **12**

Client Meet   11:34AM; 04/12/2024
Participant Count: **3**

Court Hearing   11:34AM; Today
Participant Count: **12**

View All

Faster Collections Action

Intelligent Collections Case Prioritization

Automatically score and prioritize every case, ensuring teams focus on the most recoverable accounts first
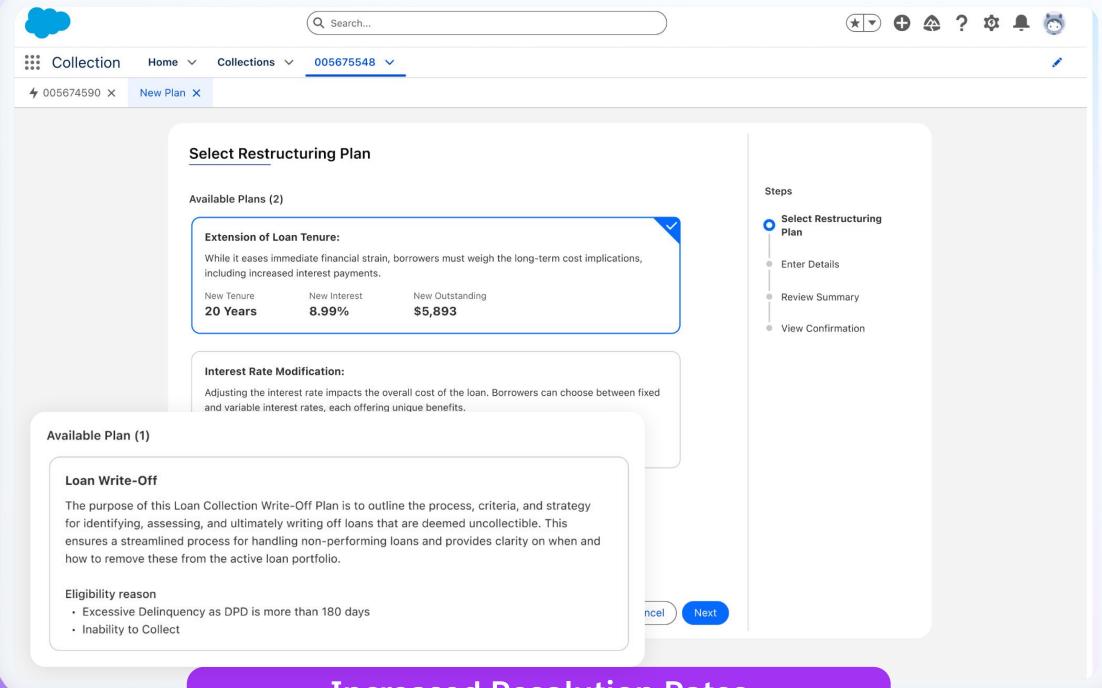
salesforce

Focus on Winnable Cases

Stop guessing and start collecting with precision. Our AI-powered triage system analyzes every new collections case, automatically assigning a score based on the likelihood of contact and successful recovery.

Prioritize for Recovery

Payment Restructuring

Provide payment terms to increase recovery rates and provide flexibility for borrowers
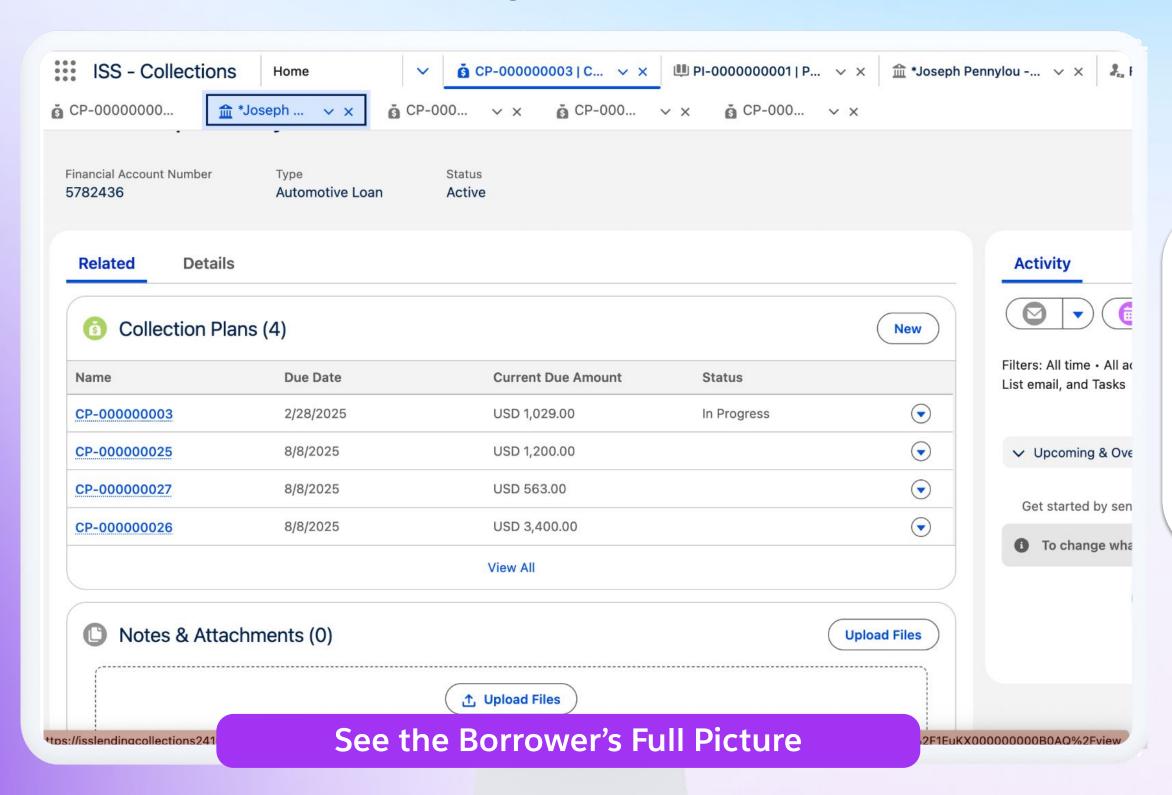
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Guided, Compliant Restructuring

Turn difficult negotiations into collaborative solutions. This pre-built guided workflow allows agents to model and formalize new payment terms directly within the collections console, helping to enforce compliance while meeting the borrower's needs.

Increased Resolution Rates

Consolidated Collections

A unified view of all outstanding collections accounts to promote informed and effective conversations

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More Effective Negotiations

Eliminate the swivel chair and provide collections specialists with a complete financial picture. Aggregate all of a borrower's outstanding collections accounts into a single, unified view for fully informed conversations.

See the Borrower's Full Picture

Pre-built Service Processes (Winter' 26)

Service Processes in Agentforce Financial Services

30

Transactions and Payment (Banking):

Stop Check Payment

Fee Reversal

Transaction Dispute Management

Request Loan Payoff

Change Billing Cycle

Transfer Funds to Own Account

Account Services (Banking):

Address Update

Manage Standing Instructions Update Email or Phone

Order Checkbook

Order Statement Copies

Travel Notification

Card Service (Banking)

Lock/Unlock Card

Reset PIN

Manage Credit Limit

Manage Card Usage

Portfolio Services (Wealth)

Manage Beneficiary

ACAT

Required Minimum Distribution

Profile Changes

Manage Standing Instructions

Account & Portfolio Planning (Banking)

Customer Bereavements/Estate Planning

Manage Beneficiary

Claims (Insurance)

Auto FNOL

258 Home FNOL

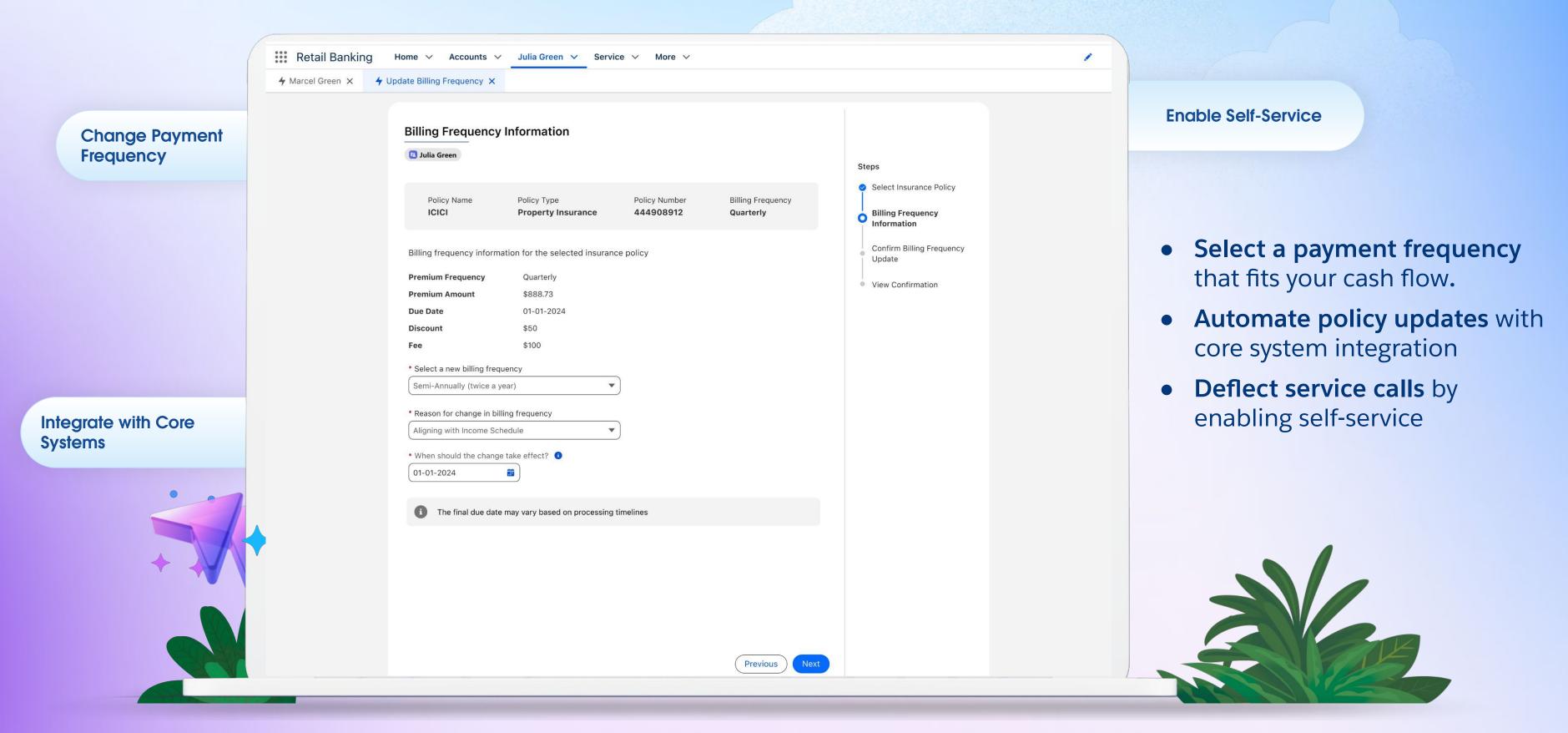### Account Information (Insurance)

Proof of Insurance

258 Update Billing Frequency

Service Process Library Enhancements - Update Billing Frequency

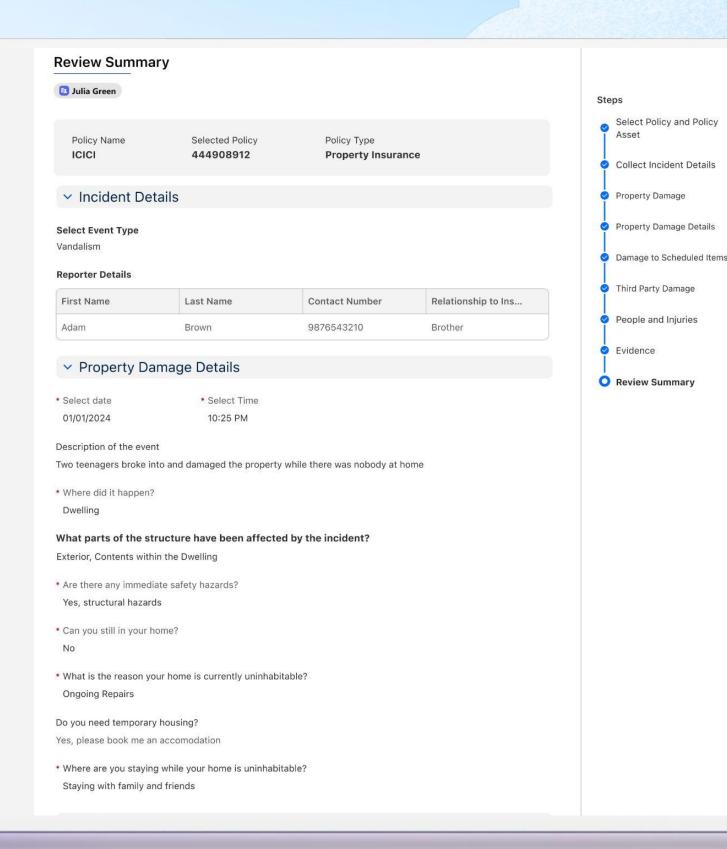
Change Payment Frequency

Integrate with Core Systems

Enable Self-Service

- **Select a payment frequency** that fits your cash flow.
- **Automate policy updates** with core system integration
- **Deflect service calls** by enabling self-service

Service Process Library Enhancements - Homeowner FNOL

Streamline incident detail capture

Expedite damage intake process

Simplify evidence and submission

- Accelerate claim filing instantly.
- Guide users through damage assessment.
- Centralize all incident files and evidence.

Review Summary

Julia Green

Policy Name	Selected Policy	Policy Type
ICICI	444908912	Property Insurance

Incident Details

Select Event Type
Vandalism

Reporter Details

First Name	Last Name	Contact Number	Relationship to Ins...
Adam	Brown	9876543210	Brother

Property Damage Details

* Select date
01/01/2024

* Select Time
10:25 PM

Description of the event
Two teenagers broke into and damaged the property while there was nobody at home

* Where did it happen?
Dwelling

What parts of the structure have been affected by the incident?
Exterior, Contents within the Dwelling

* Are there any immediate safety hazards?
Yes, structural hazards

* Can you still in your home?
No

* What is the reason your home is currently uninhabitable?
Ongoing Repairs

Do you need temporary housing?
Yes, please book me an accomodation

* Where are you staying while your home is uninhabitable?
Staying with family and friends

Steps

- Select Policy and Policy Asset
- Collect Incident Details
- Property Damage
- Property Damage Details
- Damage to Scheduled Items
- Third Party Damage
- People and Injuries
- Evidence
- **Review Summary**

Introducing **Salesforce GO for Agentforce Financial Services**

Simplifying how customers **explore, try, and configure features** with product feature discovery and guided setup.

Empowers customers with **hands-on trials**, ensuring a clear understanding of it's value.

All-in-one configuration interface streamlines adoption, **reducing the time from exploration to implementation**.
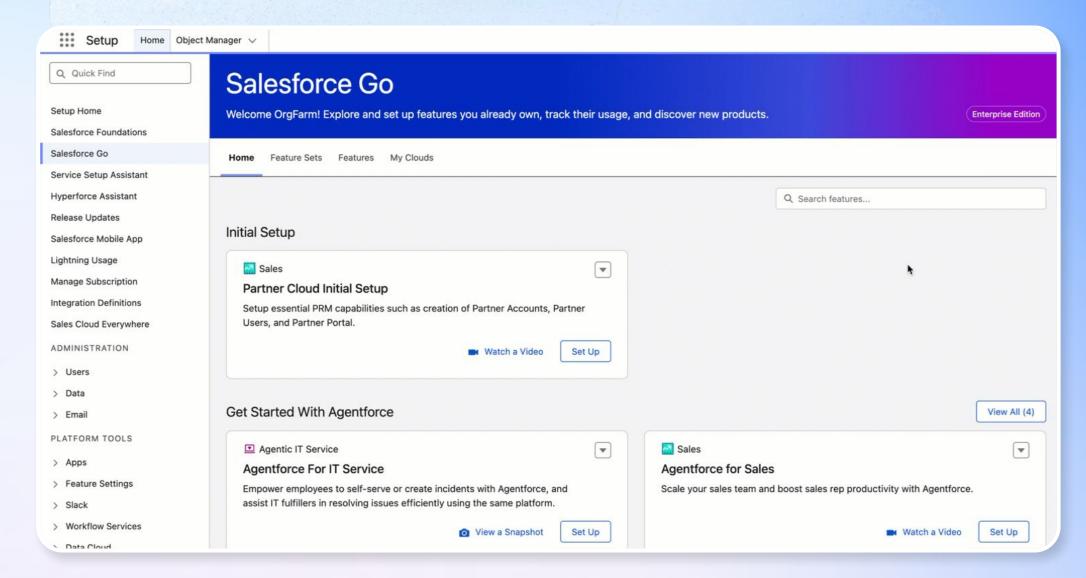
GA

Effortless Discovery of Product Capabilities
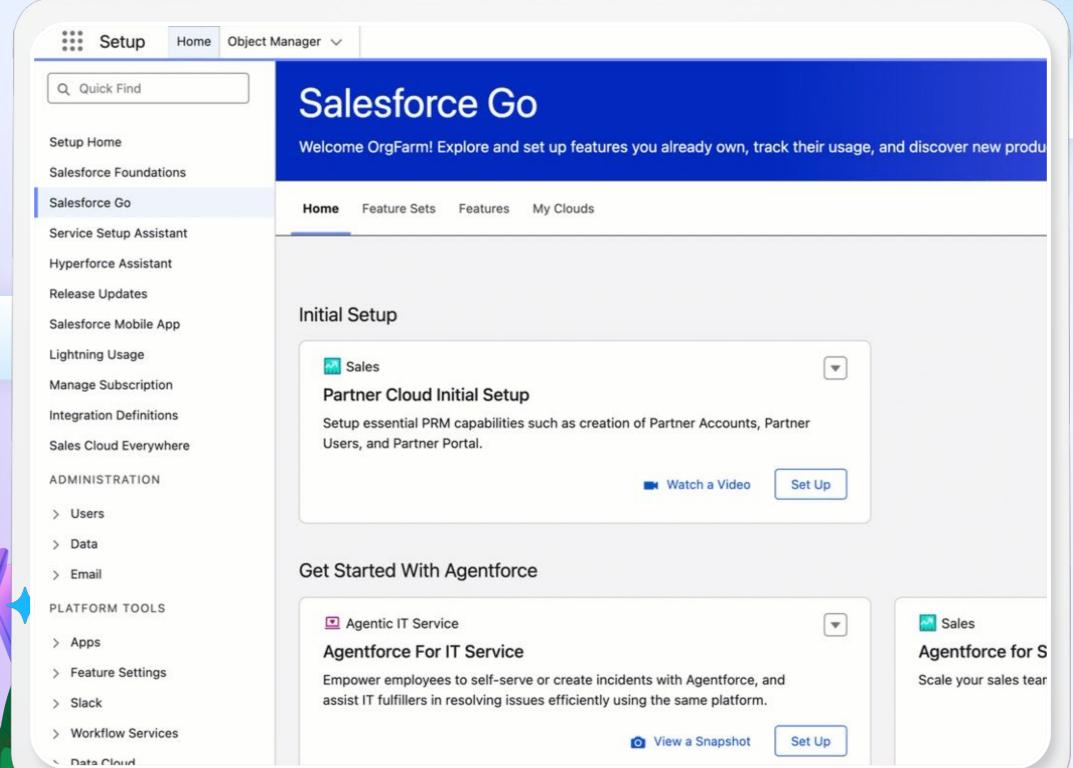
Oct'25

All-in-One Configuration within a unified interface

Feb'26

Prebuilt Solutions for a Curated Journey

Salesforce GO for Agentforce Financial Services

All-in-One Configuration within a unified interface

- Simplifying how customers explore, try, and configure features with product feature discovery and guided setup.
- Empowers customers with hands-on trials, ensuring a clear understanding of it's value.
- All-in-one configuration interface streamlines adoption, reducing the time from exploration to implementation.

Effortless Discovery of Product Capabilities

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Thank you