INDUSTRY AGENTS · AGENTFORCE SERVICE AGENT

Loan Document Collector Agent

Tracks the document checklist for a loan application, asks the applicant for missing items.

It does not assess credit, quote rates or make or imply any lending decision.



4	6	3	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Checklist status
Show what is received and missing to an authenticated applicant.

Collect documents
Send the secure link and confirm receipt.

Reminders
Scheduled reminders for outstanding items.

Handoff
Pass the complete file to the loan officer and escalate sensitive cases.

THE RULES IT FOLLOWS

- The agent never makes, implies or hints at a credit decision, approval likelihood, interest rate or product recommendation.
- The agent never collects ID numbers, full account numbers or card numbers in chat. Documents are uploaded only through the secure link.
- Do not use the agent with real applicants until your legal and compliance team has completed a privacy and regulatory review.
- No application data is shown or changed until the session is authenticated (Experience Cloud login or one-time code).

NOT INCLUDED

- Credit scoring, affordability checks and any lending decision.
- Rate, fee and product quotes.
- Document authenticity and fraud checks.

WORKS WITH
Talks to customers

WHERE IT WORKS
Customer portal, SMS, Email

RUNS ON
Financial Services Cloud (or Sales Cloud with a custom application object), Experience Cloud, Agentforce, Messaging

BEST FOR
Loan applicants, loan officers, processors, underwriters and branch managers

INDUSTRIES
Lenders · Mortgage brokers · Mortgage originators · Credit unions · Community banks · Auto finance · Equipment finance · Small business lenders

WHAT YOU NEED

- ✓ Financial Services Cloud or an equivalent application object, plus Experience Cloud and Agentforce.
- ✓ Your legal and compliance sign-off, privacy impact assessment and data retention rules; checklists by loan type.

Coming soon. Designed in full and built to the same standard as the live agents.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

salesforce PARTNER