

Datasheet: ISO 20022 Reconciler for Salesforce Agentforce

Automate Bank Reconciliation with Native AI & ISO 20022 Parsing

The Problem: Manual "Chair Swiveling"

Finance teams waste hours every week manually downloading bank statements, converting CSVs, and cross-referencing payments against Salesforce Invoices. Service Agents struggle to answer simple questions like *"Where is my payment?"* without escalating to Finance.

The Solution: Autonomous Reconciliation

The **ISO 20022 Reconciler** is a native Agentforce Action that empowers your AI Agents to understand global banking standards (camt.053, camt.052). Agents can now accept file uploads, parse complex XML structures, and automatically reconcile payments against your ledger-instantly.

Key Benefits

Zero-Touch Automation

Eliminate manual data entry. Agents process end-of-day (camt.053) and intraday (camt.052) files in seconds, matching thousands of transactions to Invoices or Opportunities without human intervention.

Intelligent Matching

The engine uses **Deterministic Logic** to match payments by Amount, Reference ID, and Date. It automatically handles "fuzzy" scenarios (e.g., Penny variances, unstructured descriptions) using configurable Regex and Tolerance settings.

100% Native & Secure

Your financial data never leaves Salesforce. Unlike API-based solutions that send data to external third-party servers, our Reconciler runs entirely within your **Salesforce Trust Boundary** using Apex and DataWeave.

Technical Specifications

Feature	Specification
Supported Files	ISO 20022 XML (camt.053.001.x, camt.052.001.x)
Matching Targets	Custom Objects (Invoice__c), Standard Objects (Opportunity)
Parsing Engine	DataWeave (Native Salesforce)
Security	100% Native Apex (No External APIs/Callouts)
Architecture	Agentforce Action (Invocable Method)
Compatibility	Sales Cloud, Revenue Cloud, Financial Services Cloud

ROI: Why Agents Love It

- **Service Agents:** "I can solve 'Where is my payment' cases in 10 seconds just by asking the customer for the file."
- **Finance Managers:** "I get a clean 'Discrepancy Report' every morning instead of a pile of raw data."
- **IT Admins:** "It's a native package. No integration servers to maintain, no security holes to plug."

Get It Now

Available on Salesforce AgentExchange

- **Trial:** 30 Days Free
- **Support:** 24/48hr Business Day Support

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