inflow.ai

INDUSTRY SOLUTION

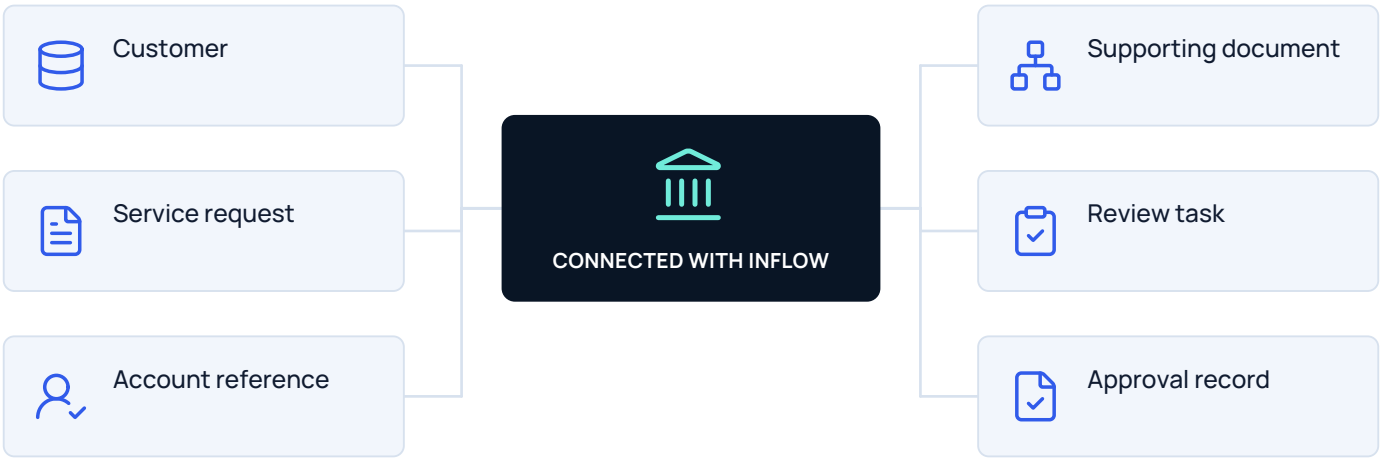
Inflow for Banking and Financial Services

Connect financial work without losing the decision trail.

Coordinate customer requests, document-intensive reviews and operational exceptions across banking teams. Connect enterprise context, configured decisions and human authority in the same journey.

CONNECTED INDUSTRY CONTEXT

The information behind the next action.



Illustrative industry information model

An operational request can pass through relationship teams, document review, specialist checks and core services. Each handoff introduces information needs and responsibility boundaries. Inflow can be configured around those handoffs, keeping the next action and its owner clear.

INDUSTRY OPPORTUNITIES

Six journeys. One connected platform.

Configure the information, decisions and handoffs around the work your teams are responsible for.

Customer onboarding coordination

Capture onboarding information, gather supporting documents and route the case through institution-defined review requirements.

An owned onboarding case with visible prerequisites.

Interface Designer / Data models / BPM / Document management

Service request handling

Coordinate changes, enquiries and operational service requests across customer channels and back-office teams.

Connected progress from customer intake to authorized response.

Lifecycles / Business applications / Integrations / Human tasks

Credit-review preparation

Assemble permitted applicant information and supporting files for an authorized analyst; use AI assistance for preparation, not an autonomous credit decision.

A structured review pack for accountable human assessment.

AI agents / Data fabric / Document management / Rules engine

Operational exception management

Create an owned case when an integration, reconciliation or review encounters a defined exception.

Explicit exception paths rather than untracked follow-up.

Events / Lifecycles / Rules engine / Operational reports

Complaint and investigation workflows

Connect correspondence, relevant records, specialist referrals and response approvals for a complaint journey.

A coherent record of review and approved communication.

BPM / Document generation / Human tasks / Access control

Internal approvals and servicing

Model delegation, approval routing and supporting information for internal operational requests.

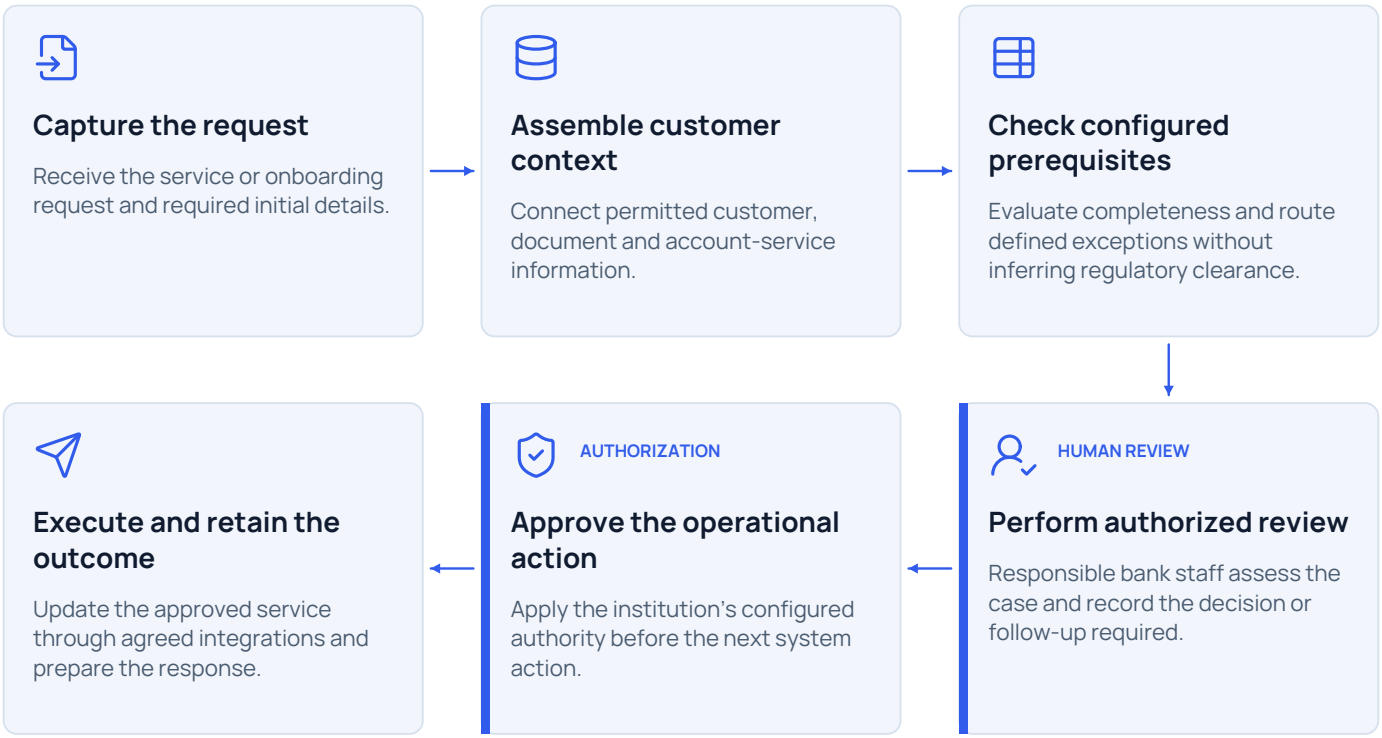
Defined responsibility and permitted actions across teams.

Rules engine / Lifecycles / Interface Designer / Integrations

JOURNEY AND DECISIONS

From request to accountable action.

An illustrative configured journey. Human review and authority are explicit parts of the design.



Illustrative service-review routing

Required information	Review condition	Owner	Next action
Missing	Not ready	Service team	Request information
Complete	Standard review	Authorized reviewer	Assess the request
Complete	Exception recorded	Specialist team	Review the exception
Review recorded	Approval required	Delegated approver	Authorize the operational action

Illustrative operational routing. This is not a credit policy, compliance determination or financial advice. Institution-specific controls require separate review.

PLATFORM AND OPERATING CONTEXT

One platform. The context to act.

Sovereign AI, agentic automation and modern digital transformation. Connect the platform capabilities needed for your industry journey.

Enterprise context

Data models, relationships, data fabric, queries and permitted information.

Intelligence and business logic

AI agents, MCP, rules, BPM, lifecycles and human review.

Experiences and action

Interface Designer, applications, documents, integrations and operational insight.

Connect existing systems.

- Core banking and customer service platforms
- Institution-approved identity and verification services
- Document repositories, correspondence and operational data sources

Define the controls.

- Distinguish preparation, assessment and authorization.
- Use permitted information and role-defined access.
- Agree data flows and integration authority for each deployment.

See Inflow in your operating context.

Bring a banking service or review journey to a focused demonstration.

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