

Ortoo Orchestrator for Insurance Claims Operations in Salesforce

Run claims from First Notice of Loss (FNOL) to resolution without manual fixing

Control end-to-end claims processing

Ortoo Orchestrator removes the operational work claims teams shouldn't have to do, such as FNOL intake, triage, routing, document handling, and follow-ups.

You define how claims run step by step, and each step is executed by a specialized agent, ensuring consistent execution without manual intervention.

AI is used where it adds value, such as FNOL intake and document understanding — while routing, validation, and assignment remain controlled and predictable. Complex or high-risk claims are surfaced to the right person with full context for review.



Key benefits

Control how claims are handled

Define and execute claims processing end-to-end

Specialist agents per step

Each stage of the claims process has a clear role, not one general AI

Salesforce-native setup

Runs entirely inside Salesforce using your data, flows, and security model

Predictable cost model

Execution is tied to work completed, not token usage

No-code configuration

Operations teams can build agents and update workflows without IT

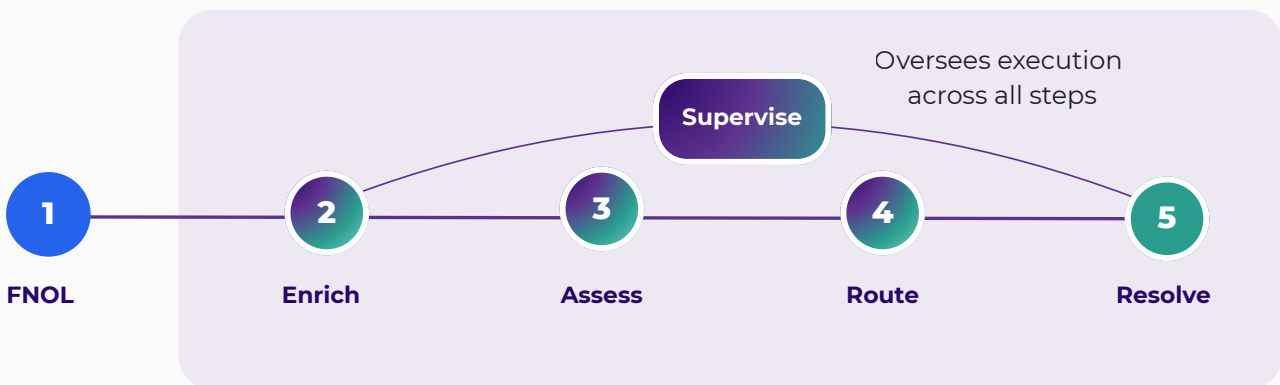
Data security and governance

All data remains in Salesforce, with controlled AI usage and no unintended exposure

Eliminate manual fixes

Workflows execute efficiently – teams do what they should

From FNOL to resolution without manual fixes



Each step in the claims process is handled by agents — with or without AI — as you define it.

Trusted by enterprises with complex Salesforce operations

Orchestrate claims workflows with full control over execution and AI usage

Built for how complex insurance operations run on Salesforce

Salesforce-native

Runs directly inside Salesforce, using your claims data, workflows, and automation — no external systems added

Works across systems

Connects to policy admin, billing, document systems, and external partners to retrieve and update data

Controlled execution

Claims are handled step by step by specialized agents, with full visibility and governance of each stage

Build

Design claims workflows
Define how claims should run from FNOL to resolution

Compose agents from reusable functions and tools
Combine data access, API actions, AI steps, and routing logic into structured agents

Design agent-to-agent workflows
Chain specialised agents together to handle each step of the process

Configure without code
Build and update workflows without code, scripts or IT

Control inputs, outputs, and behaviour
Define what data is used in and out of Salesforce, how it is used, and what each step is allowed to do

Execute

Step-by-step execution
Each step is carried out in sequence as defined

Coordinated claims handling
FNOL, triage, routing, and processing run as one controlled workflow

Event-based triggers
Start workflows from FNOL submission, updates, or new information

External system actions
Update policy systems, trigger vendors, and call APIs

Predictable execution
Each step runs as configured, so claims don't stall or require constant manual fixes

Operate & Monitor

Full visibility for monitoring
See how claims are handled at every step natively in Salesforce

Trace every action
Understand what happened and why through complete audit trails

Control where AI is used
Apply AI where it adds value, and bring your own model — full governance and control

Predictable cost model
Tie cost to claims processed, not variability — no token sprawl

Secure, Salesforce-native execution
All actions run within Salesforce permissions, roles, and data access controls

See how this would work for your claims workflows?

Let's map your claims processes in Salesforce, see how they run today, and where they could be improved?

[Book a session](#)

