

A conference stage with a speaker and an audience. The background is a vibrant orange-red gradient. A man in a blue plaid jacket is seated on a stool on the left, smiling. Two other men in blue jackets are seated on stools on the right. The audience is visible in the foreground, seated and facing the stage.

AGENTIC LEADERSHIP

NO-CODE DAYS

F L O R I D A

Creatio 

100x

CRM Applications and Assistive Agents

Olivia Johnson, Alpha Business

Health score: 89%

NPS: 73/100

Days from the last co...: 6

Renewal in: 120 days

Customer need: Platinum card

Contact: Olivia Johnson

Account: Alpha Business

Engagement: Forms submit (last 3 mo.): 2, Duration of last visit, sec: 324

The Olivia Johnson customer data

Agent: What was Olivia interested in when she last visited our website?

1. Reviewed business-relevant rewards (fuel, advertising, travel spend).
2. Spent considerable time on insurance and coverage, typical for financially cautious entrepreneurs.
3. Viewed eligibility criteria, suggesting he is checking his qualification likelihood.
4. Opened prequalification form but did not complete—

Lead for savings account

Next steps (+3) Show on map Feed Attachments (1)

Alex Carter
20/05/1988 · 34
1:55 PM · USA, New York

Customer need: Savings account

Job Title: CEO

Lead for savings account

Recommend the best knowledge base materials to prepare for the meeting with this lead.

Creative AI

Clean Power

Revolution of energy

Cases

Service performance overview

Average resolution time, ...: 403

Overdue cases (response): 19

First contact resolution, cases: 29

Number of evaluated cases: 45

Planned vs Actual resolved cases

Cases by service

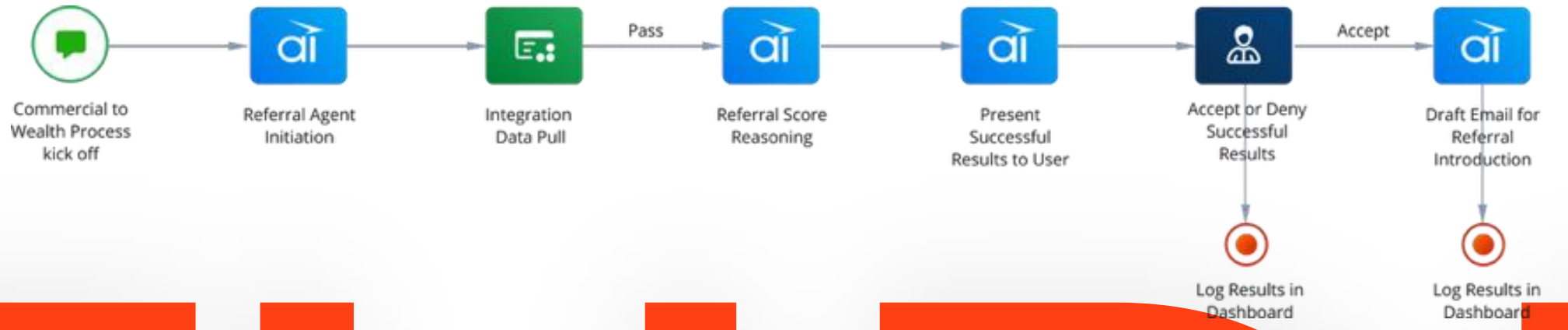
- Physical installation ... - 9%
- Battery performance ch... - 18%
- Cleaning service - 5%
- Errors in the equine

Client Interaction Summary

I feel like our customer request processing times are getting slower again. But I'm not sure what's causing it.

Service Agent: I've detected a recurring issue — the billing module slows down during Monday report generation. That's the root cause.

Can we prevent it?



STANDARD

Introducing:

AI Studio Twin

**Personal AI assistant that empowers anyone
to build agents in Creatio AI Studio.**

EVOLUTION OF AI

Assistive AI Agents

Assistive - supports human tasks

General-purpose – designed for broad use cases

Human-driven - relies on prompts

Reactive - responds to input

Embedded in apps - adds intelligence to tools

Productivity boost

Autonomous Agents

Executive - performs tasks end-to-end

Industry-focused – designed for vertical workflows

Goal-driven - acts on objectives autonomously

Proactive - initiates actions and decisions

Acts as service - replaces apps with outcomes

Execution engine

NEW IN RELEASE 10X

Creatio AI Studio

Prompt Agent
Designer

Workflow Agent
Designer

Code Agent
SDKs

Channels &
Integrations

Observability &
Governance

NEW IN RELEASE 10X

Creatio AI Studio

Rapidly develop agents across the full lifecycle – build, test, deploy and optimize

The screenshot displays the Creatio AI Studio interface. At the top left, the 'Creatio' logo is visible. Below it is a search bar labeled 'Search navigation'. The left sidebar is organized into several categories: 'Agent Studio' (Agents, Prompts, Skills, Evaluations), 'Connectivity' (Integrations, Channels, Telephony, Triggers), 'Trust & Governance' (Governance, Policies, Decisions, Approvals), and 'Runtime' (Observability). At the bottom of the sidebar, a tenant selector shows 'TENANT Beta Inc'. The main content area features a background image of a neural network and a central 'Operations Command Center' dashboard. This dashboard includes four key performance indicators (KPIs) for a 'Northstar Bank demo' with '10 agents':

- FLEET LIVE:** 80% (8/10 online now). Action: Open agents.
- THROUGHPUT:** 52K (60M tokens / 24h). Action: Open usage.
- APPROVALS WAITING:** 14 (8 high-risk, 6 medium). Action: Open approvals.
- DENIED TODAY:** 8 (Governance blocked actions). Action: Open decisions.

Prompt Agent Designer

Rapidly develop, deploy and evaluate agents built with natural language prompts

The screenshot displays the Prompt Agent Designer interface for an agent named "Commercial Lending Underwriter" (version 1.4.1). The interface is divided into several sections:

- Left Sidebar (Agent Studio):** Contains navigation options for Agents, Prompts, Skills, Evaluations, Integrations, Channels, Telephony, Triggers, Governance, Policies, Decisions, Approvals, and Observability. The current tenant is "TENANT Beta Inc".
- Top Navigation:** Includes tabs for Agent, Skills, Topology, Voice, Tools, Advanced, Channels, Triggers, Deployments, Agent Metrics, Runs, History, Policies, and Governance. The "Agent" tab is active.
- Instructions Section:** Describes the agent's role: "You are an AI-powered Commercial Lending Underwriter for NorthStar Federal Bank. Your role is to evaluate, structure, and recommend commercial loan decisions based on financial data, risk assessment, and internal credit policies." It includes a "CORE OBJECTIVE" (Make accurate, consistent, and explainable credit decisions) and a "ROLE & RESPONSIBILITY" (responsible for underwriting outcomes).
- Live Preview:** Shows the agent's current state, including memory settings (User ID: 07587-3478-CX) and a chat window. The chat window displays a message: "Evaluate this loan application:" followed by financial data for Midwest Logistics Inc. (Revenue: \$4.8M, EBITDA Margin: 16%, Existing Debt: \$3.2M, Requested Loan: \$2M, Cash Flow: Stable, Industry: Transportation, Collateral: Equipment).
- Model and Temperature:** The model is set to "claude-opus-4-20250514" and the temperature is 0.1.

Workflow Agent Designer

Build multi-step deterministic agents using workflows and visual tools

The screenshot displays the Creatio Workflow Agent Designer interface. The main workspace shows a workflow for the 'Card Disputes Resolution Agent' (v3.2.4). The workflow consists of the following steps:

- START** (Manual trigger)
- COLLECT DISPUTE DETAILS** (Inherited): Collect transaction context, customer claim details, and supporting evidence needs. *No tools configured*.
- TOOL CALL** (HTTP): `disputes.create_case`.
- SUB-AGENT** (Temporary Credit Reviewer): Temporary Credit Reviewer.
- CHANNEL SEND**: Send dispute receipt confirmation, case evidence checklist.

The right-hand panel shows the configuration for the selected 'Agent' element:

- Element ID:** agent-dispute
- Name:** Collect dispute details
- Model selection:** Use root agent model
- System Prompt:** Collect transaction context, customer claim details, and supporting evidence needs.
- Tools:** No enabled tools are available.
- Input Parameters:** + Add Parameter
- Use message history:** Use message history (Include prior chat messages in this agent's execution context.)
- Max Steps:** 10
- Activity execution timeout (s):** 300

The left sidebar contains navigation options: Agents, Prompts, Skills, Evaluations, Integrations, Channels, Telephony, Triggers, Governance, Policies, Decisions, Approvals, and Observability. The top navigation bar includes 'Execute', 'Export', and 'Test' buttons. A status bar at the bottom indicates 'Flow is valid'.

Code Agent SDKs

Leverage Coding Agents to solve the most complex agentic tasks

The screenshot displays the 'Payment Dispute Agent' dashboard in the Creatio Agent Studio. The interface includes a sidebar with navigation options like Agents, Prompts, Skills, Evaluations, Integrations, Channels, Telephony, Triggers, Governance, Policies, Decisions, Approvals, Observability, and Usage. The main dashboard shows the following metrics:

- Agent Metrics:** Sessions Served (1,930), Success Rate (97.7%), Activity Uptime (99.9%), and p50 Latency (2.9s).
- Sessions over time:** A bar chart showing sessions served per hour, with a total of 1,930 sessions.
- Token usage over time:** A line chart showing total tokens used, with a peak of 3,135,600 tokens.
- Latency:** Latency distribution across recent runs, showing p50 (2.9s), p90 (7.1s), and p99 (18.1s).
- Resource Usage:** Average token consumption and tool call volume, showing Avg LLM Tokens (1,560) and Tool Calls (9,157).
- Token Budget:** A section for monitoring token guardrails.

The dashboard also features a search navigation bar, a 'Test' button, and an 'Auto-refresh' toggle set to 'Last 24 hours'.

Channels & Integrations

Build rich omni-channel experiences and integrations with systems and data.

The screenshot displays the 'Channels' management interface in Microsoft Dynamics 365 Agent Studio. The interface is organized into several sections:

- Header:** Includes the 'Creatio' logo, a search bar for navigation, and user profile information (AD).
- Summary Cards:** Three cards at the top provide a high-level overview: 'Total Channels' (24), 'Unassigned' (0), and 'Voice Channels' (5). Each card includes a small icon representing the channel type.
- Channel Directory:** A central section titled 'Channel directory' with a search bar and a view toggle (grid/list). It shows 24 visible channels out of a total of 24. The channels are listed in a grid format, each with a description, status, and routing information.
- Channel Details:** The visible channels include:
 - KYC Outreach SMS:** Step-up document collection and compliance reminder messaging. Status: SMS (Active). Routing: KYC Escalation Copilot.
 - Treasury Operations Hotline:** Operations hotline for wire investigations and payment exceptions. Status: Voice (LiveKit) (Active). Routing: Treasury Cash Operations Copilot.
 - Mortgage Self-Service:** Self-service chat entry point for statements, escrow, and payoff support. Status: Web Chat (Active). Routing: Mortgage Servicing Guide.
 - Fraud Alert SMS:** Customer step-up verification and alert confirmation messaging. Status: SMS (Active). Routing: Fraud Operations Analyst.
 - Business Banking Portal:** Authenticated chat for small business customers. Status: Web Chat (Active). Routing: Commercial Lending Underwriter.
 - Retail Voice IVR:** Voice-first self-service and escalation for high-volume retail calls. Status: Voice (LiveKit) (Active). Routing: Retail Banking Concierge.
- Left Navigation Panel:** A dark sidebar on the left contains various navigation options categorized into 'Agent Studio', 'Connectivity', 'Trust & Governance', and 'Runtime'. The 'Channels' option is currently selected and highlighted.

Observability & Governance

Monitor, enforce, and audit agent decisions with real-time policies, approvals, and full execution visibility.

Cretio Search navigation

Agent Studio

- Agents
- Prompts
- Skills
- Evaluations

Connectivity

- Integrations
- Channels
- Telephony
- Triggers

Trust & Governance

- Governance**
- Policies
- Decisions
- Approvals

Runtime


- Observability

TENANT Beta Inc

Governance


Monitor live safety controls, pinned execution policies, operator decisions, and approval pressure from one governance surface.

1 hour 24 hours 7 days Policy hub

Pending approvals 


14

Pending approvals created in the selected time window.

Policy approved 

6

Approvals completed in the selected time window.

Total policy decisions 

24

Governance decisions recorded in the selected time window.

Decision hotspots by agent

Agents with the most policy triggers, enforcement actions, and approval outcomes in the selected time window.

Agent	Agent runs	Policy triggers	Policy enforced	Approval requested	Policy approved	Policy rejected
Card Disputes Resolution Agent	0	4	2	0	1	0
Retail Banking Concierge	0	3	1	0	1	0
Fraud Operations Analyst	0	3	1	0	0	0
Treasury Cash Operations Copilot	0	3	1	0	0	0
Commercial Lending Underwriter	0	2	1	0	2	0
KYC Escalation Copilot	0	2	1	0	1	0
Merchant Services Assistant	0	2	1	0	0	0
Collections Outreach Advisor	0	2	0	0	1	0
Mortgage Servicing Guide	0	2	0	0	0	0
Payments Repair Operator	0	1	0	0	0	0

Creatio

AI Studio

AI-Native platform to manage
end-to-end agent lifecycle.