CUSTOMER SERVICE · AGENTFORCE SERVICE AGENT

Appointment Booking & Rescheduling Agent

Lets customers book, move and cancel appointments in a web chat or on WhatsApp.

The Appointment Booking and Rescheduling Agent lets customers book, move and cancel appointments in a web chat or on WhatsApp. It checks real availability, creates the booking record, sends a confirmation and enforces the cancellation policy. Booking no longer needs a phone call or an email thread with staff.



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SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Book new appointment
Create a first booking for a verified or new customer.

Reschedule or cancel
Change or cancel an existing booking under the policy.

Booking questions
Answer simple questions about services, duration and preparation from Knowledge.

THE RULES IT FOLLOWS

- Verify the customer before showing, changing or canceling any existing booking.
- Never offer a slot outside 09:00 to 17:00 Monday to Friday or in the past.
- Never create two bookings for the same Resource at overlapping times.
- **Never reveal another customer's booking**
  Only show bookings linked to the verified Contact.

NOT INCLUDED

- Salesforce Scheduler setup and multi-resource territory scheduling.
- Calendar sync with Google or Outlook.
- Recurring appointments.

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, WhatsApp

RUNS ON
Service Cloud, Messaging, Agentforce

BEST FOR
Customers booking visits, office staff who view the calendar, schedulers, front-desk teams and service managers

INDUSTRIES
Local services · Home services · Salons · Auto repair · Clinics · Pet grooming · Fitness studios · Cleaning services

WHAT YOU NEED

- ✓ Service Cloud with Messaging licenses and a WhatsApp Business account.
- ✓ Service types, durations, business hours and the cancellation policy text.

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