SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · CUSTOMER SERVICE · NOVEMBER 2026

Appointment Booking & Rescheduling Agent

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



STATUS
COMING SOON

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, WhatsApp

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Appointment Booking & Rescheduling Agent takes off your team.

WHAT IT DOES

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.

WHAT CHANGES

Booking no longer needs a phone call or an email thread with staff.

A TYPICAL FIT

A home energy assessment company with 4 assessors who take 60 minute site visits.



WHO USES IT Customers booking visits, office staff who view the calendar, schedulers, front-desk teams and service managers

WHAT IT DOES

Everything the Appointment Booking & Rescheduling Agent handles.

01

Book new appointment

Create a first booking for a verified or new customer.

02

Reschedule or cancel

Change or cancel an existing booking under the policy.

03

Booking questions

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

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Verify the customer before showing, changing or canceling any existing booking.

02 Never offer a slot outside 09:00 to 17:00 Monday to Friday or in the past.

03 Never create two bookings for the same Resource at overlapping times.

04 **Never reveal another customer's booking**
Only show bookings linked to the verified Contact.

05 If the customer is upset or asks for a person, transfer immediately.

06 **Do not quote prices**
Direct price questions to Knowledge or a person.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

Deployable source
The agent, actions, objects and screens as Salesforce metadata.

Solution design
A Solution Design Document with UML for your architects.

Test suite
Apex tests plus replayed conversations, run before every release.

Least-privilege access
Permission sets for the agent user and for your staff.

Runbook and handover
How to run it, change its rules and roll back.

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

NEXT STEP

Get the Appointment Booking & Rescheduling Agent scoped for your org.

A free 60-minute review with an architect: what it would do in your org, what it needs and how long it takes.

EMAIL

contact@synconai.com

THE AGENT

synconai.com/ai-agents/appointment-booking-and-rescheduling-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER