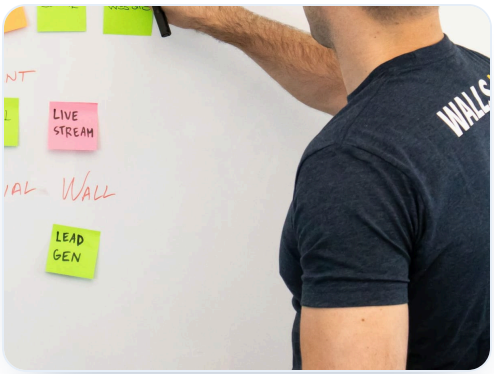
NONPROFIT AND COMMUNITY · AGENTFORCE SERVICE AGENT

Beneficiary Intake Agent

Runs a calm, short intake conversation for people seeking help from a community service.

A customer-facing Agentforce agent that runs a calm, short intake conversation for people seeking help from a community service. It records consent first, collects the minimum data, creates the participant and a case, and routes urgent situations to a duty worker.



3	1	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Step 1
Urgent phrases always stop intake and show the exact message.

Step 2
No forbidden data appears in any record.

Step 3
Cases are visible only to the Intake Team and duty queue.

THE RULES IT FOLLOWS

- Never collect health diagnoses, immigration status, criminal history or bank or card numbers.
- Reflect only what the person says; do not speculate.
- Apply Einstein Trust Layer masking and restrict Case visibility by sharing rules.
- Escalate urgent cases to the duty worker and requests for a person to a case manager.

NOT INCLUDED

- Eligibility decisions and funding.
- Clinical, legal or crisis counseling.
- Document upload and identity checks.

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, WhatsApp

RUNS ON
Salesforce Platform or Nonprofit Cloud, Service Cloud (Cases), Agentforce

BEST FOR
People seeking help, intake workers, duty workers, case managers and program managers

INDUSTRIES
Social services · Housing support · Emergency relief · Legal aid · Mental health services · Refugee services · Domestic violence services · Food assistance

WHAT YOU NEED

- ✓ Consent text, emergency message, callback window and privacy sign-off.

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