SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · NONPROFIT AND COMMUNITY · NOVEMBER 2026

Beneficiary Intake Agent

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



STATUS
COMING SOON

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, WhatsApp

CONTACT
contact@synconai.com

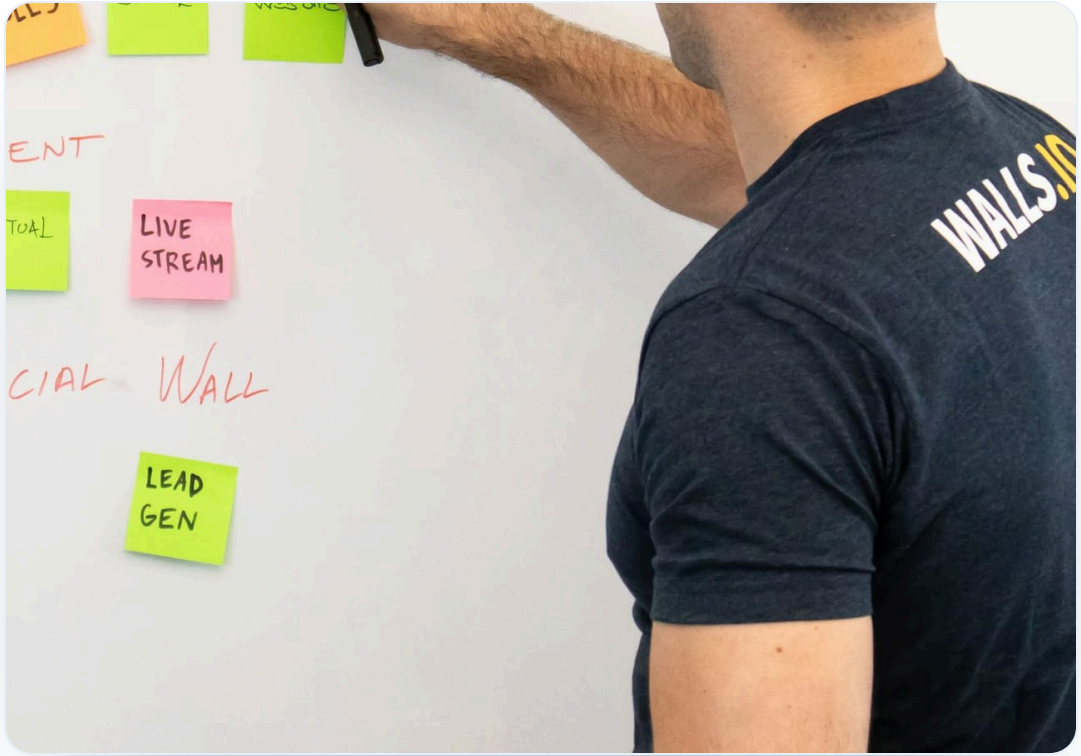
salesforce PARTNER

THE JOB IT TAKES ON

What the Beneficiary Intake Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT People seeking help, intake workers, duty workers, case managers and program managers

WHAT IT DOES

Everything the Beneficiary Intake Agent handles.

01

Step 1

Urgent phrases always stop intake and show the exact message.

02

Step 2

No forbidden data appears in any record.

03

Step 3

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

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never collect health diagnoses, immigration status, criminal history or bank or card numbers.

02 Reflect only what the person says; do not speculate.

03 Apply Einstein Trust Layer masking and restrict Case visibility by sharing rules.

04 Escalate urgent cases to the duty worker and requests for a person to a case manager.

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

NEXT STEP

Get the Beneficiary Intake 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/beneficiary-intake-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER