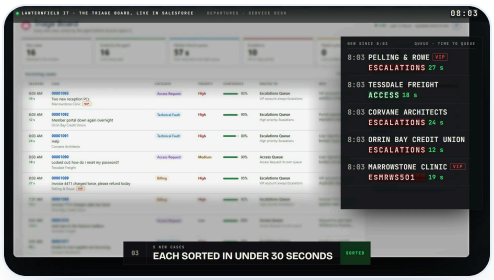
CUSTOMER SERVICE · AUTONOMOUS AGENT

Case Triage & Routing Agent

Every case, in the right queue, before anyone opens it.

The Case Triage & Routing Agent reads every new case the moment it arrives in Salesforce. It decides the category, the priority and the sentiment, routes the case to the right queue, attaches the best Knowledge article and leaves a note for the team. Urgent and VIP cases reach your team in Slack. It works in the background: no chat, and it never replies to the customer.



6	8	101	427	92%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Reads every new case
In the background, the moment a case is created by email or web.

Category, priority, sentiment
Decided from the whole case, with a confidence score and a reason.

The right queue
From a fixed list of your queues; VIP and high priority always to escalations.

The best Knowledge article
Attached to the case, so the reply starts from the right steps.

A note for the team
On urgent cases, so nobody has to read the case twice.

An alert in Slack
Urgent and VIP cases reach your team's channel straight away.

THE RULES IT FOLLOWS

- **Never talks to the customer**
  It never replies, never closes a case and never changes its status.
- **A person decides when unsure**
  Below 70% confidence, the case goes to a person instead of a guess.
- **Fixed lists**
  Categories and queues come from your fixed lists; it cannot invent a new one.
- **VIPs by rule**
  VIP and high priority cases always go to escalations, decided in Salesforce.

PROVEN IN A LIVE RUN

Read on arrival. Every new case, in seconds, before the team logs on.

The right queue. Category, priority and sentiment, with the reason for every call.

VIPs never wait. VIP and high priority cases always go to escalations, by rule.

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email, In the background

RUNS ON
Agentforce, Salesforce Service Cloud, Salesforce Knowledge, Slack

BEST FOR
Service team leads, support agents, service managers, contact center supervisors, customer success teams and VIP account teams

INDUSTRIES
IT and managed services, Software and SaaS support, Financial services, Insurance, Telecommunications, E-commerce and retail

WHAT YOU NEED

- ✓ **Service Cloud**
  Cases and queues in Salesforce, created by email, web or any channel.
- ✓ **Agentforce**
  Agentforce for service, running in the background.
- ✓ **Knowledge**
  Salesforce Knowledge with published articles.
- ✓ **Slack (optional)**
  The Salesforce app for Slack, for urgent and VIP alerts.

Live. Recorded on a real Salesforce org and last validated Nov 13, 2026.

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