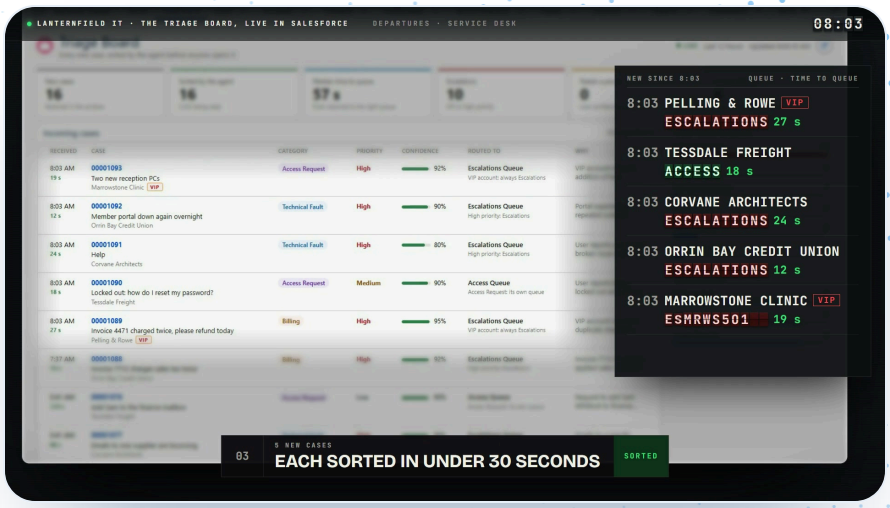
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · CUSTOMER SERVICE · NOVEMBER 2026

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

Case Triage & Routing Agent. It 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.




STATUS
LIVE DEMO

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email, In the background

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

# Every case waits to be read.

Customers write in before the team logs on. Someone has to open each case, decide what it is and send it to the right queue. Until then, a VIP's double charge looks exactly like a password question, and it waits in the same pile.

**An urgent case found an hour late**

**The first hour of every day spent sorting**

**Cases passed from queue to queue**

**THE COST** The answer is already in Salesforce. Nobody has read the case yet.

WHAT IT DOES

# Everything the Case Triage & Routing Agent handles.

## 01
### Reads every new case
In the background, the moment a case is created by email or web.

## 02
### Category, priority, sentiment
Decided from the whole case, with a confidence score and a reason.

## 03
### The right queue
From a fixed list of your queues; VIP and high priority always to escalations.

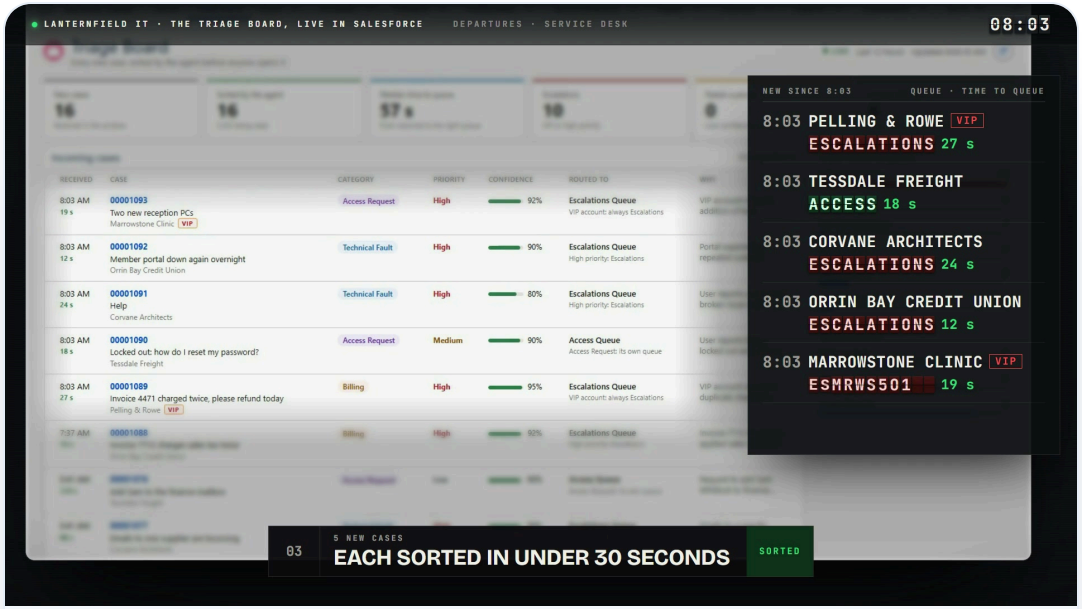
## 04
### The best Knowledge article
Attached to the case, so the reply starts from the right steps.

## 05
### A note for the team
On urgent cases, so nobody has to read the case twice.

## 06
### An alert in Slack
Urgent and VIP cases reach your team's channel straight away.

PROOF

# Recorded live on a real Salesforce org.




Watch the full run (3:15) at synconai.com/ai-agents/case-triage-and-routing-agent

- **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.
- **A person decides when unsure.** Below 70% confidence, it goes to a person, not a guess.

THE VIP DOUBLE CHARGE

**Read and routed in 27 seconds.**

THE LOCKED-OUT USER

**Read and routed in 18 seconds.**

THE ALERT IN SLACK

**On her phone before she reaches her desk.**

BUILT TO BE TRUSTED

# The rules it cannot talk its way around.

**01 Never talks to the customer**
It never replies, never closes a case and never changes its status.

**02 A person decides when unsure**
Below 70% confidence, the case goes to a person instead of a guess.

**03 Fixed lists**
Categories and queues come from your fixed lists; it cannot invent a new one.

**04 VIPs by rule**
VIP and high priority cases always go to escalations, decided in Salesforce.

**05 Card numbers kept out**
Tested to keep card numbers out of every note and alert.

**TESTED BY REPLAY** A set of real cases replayed in Agentforce testing before release, including Spanish-language cases, cases with card numbers and cases written to trick it.

THE DIFFERENCE

# A routing rule reads a field. This agent reads the case.

| WHEN | ASSIGNMENT RULES AND A SHARED INBOX | THIS AGENT |
|---|---|---|
| **A case arrives at 6:45 AM** | Waits in a general queue until someone opens it | **Read in seconds and routed to its queue** |
| **The subject says "Help"** | A rule cannot tell what it is | **Read in full; below 70% confidence a person decides** |
| **A VIP is charged twice** | Looks like every other billing email | **Escalated by rule, with the refund article attached** |
| **The customer is angry** | Nobody knows until they read it | **Sentiment set on the case** |
| **The answer is in Knowledge** | Searched for by the agent who picks it up | **The best article already attached** |
| **It is urgent** | Found when someone gets to it | **An alert in your team's Slack channel** |

DELIVERY

# Your queues, your rules, your cases.

1

### Map your queues

Your queues, categories, VIP accounts and what counts as urgent.

2

### Configure in your org

The agent on new cases, the Triage Board, the case panel and your Slack channel, in your wording.

3

### Test with your real cases

Last month's cases replayed before go-live and before every change.

4

### Go live and hand over

One queue first, then all of them, with a runbook and the test set.

**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 · Agentforce · Knowledge · Slack (optional)

NEXT STEP

# Get the Case Triage & Routing 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/case-triage-and-routing-agent**

GLOBAL DELIVERY

**United States · Australia · India**

BUILT BY

**SynconAI, Salesforce Select Partner · 5.0/5 CSAT**

salesforce PARTNER