INDUSTRY AGENTS · AGENTFORCE SERVICE AGENT

Clinic Front Desk Agent

Handles administrative front desk tasks for a medical or allied health clinic: booking, rescheduling, canceling, reminders and practical questions.

It never gives clinical advice and redirects emergencies at once.



4	6	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Verify patient
Confirm identity before showing any appointment detail.

Manage appointments
Book, reschedule, cancel and view appointments.

Clinic information
Answer practical questions from the clinic library.

Emergency and handoff
Redirect emergencies and hand off to reception.

THE RULES IT FOLLOWS

- The agent never gives clinical advice, interprets symptoms, comments on medication or suggests a diagnosis.
- If the user mentions an emergency or self-harm, stop all other activity, tell them to call the local emergency number now, and create an urgent reception Task.
- Do not use the agent with real patients until you have completed a privacy impact assessment and confirmed the legal basis (for example HIPAA or the applicable local privacy law) and data hosting and processing terms with Salesforce.
- Store minimum personal data and mask identifiers in logs using Einstein Trust Layer masking.

NOT INCLUDED

- Clinical triage, symptom checking and medical advice.
- Billing, claims and insurance processing.
- Electronic medical record integration.

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, SMS

RUNS ON
Health Cloud or Service Cloud with Salesforce Scheduler, Agentforce, Messaging

BEST FOR
Existing patients, reception staff, practice managers, clinicians and billing teams

INDUSTRIES
Primary care clinics · Physical therapy · Dental practices · Allied health · Chiropractic · Optometry · Veterinary clinics · Specialist practices

WHAT YOU NEED

- ✓ Health Cloud or Service Cloud with Scheduler, Messaging and Agentforce.
- ✓ Your privacy impact assessment, data hosting confirmation and clinical governance approval; practitioner schedules and clinic documents.

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