AGENTFORCE AGENT · INDUSTRY AGENTS · NOVEMBER 2026

Clinic Front Desk Agent

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



STATUS
COMING SOON

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, SMS

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Clinic Front Desk Agent takes off your team.

WHAT IT DOES

A patient-facing agent that 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.



WHO USES IT Existing patients, reception staff, practice managers, clinicians and billing teams

WHAT IT DOES

Everything the Clinic Front Desk Agent handles.

01

Verify patient

Confirm identity before showing any appointment detail.

02

Manage appointments

Book, reschedule, cancel and view appointments.

03

Clinic information

Answer practical questions from the clinic library.

04

Emergency and handoff

Redirect emergencies and hand off to reception.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 The agent never gives clinical advice, interprets symptoms, comments on medication or suggests a diagnosis.

02 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.

03 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.

04 Store minimum personal data and mask identifiers in logs using Einstein Trust Layer masking.

05 Hand off billing disputes, complaints, referrals, prescription requests and results inquiries to reception.

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 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.

NEXT STEP

Get the Clinic Front Desk 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/clinic-front-desk-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER