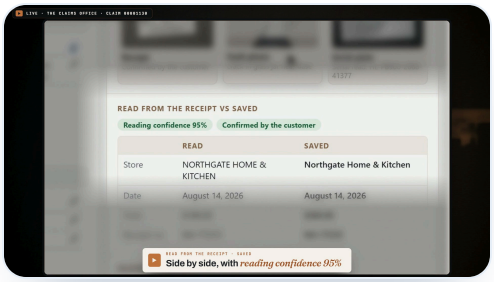
CUSTOMER SERVICE · AGENTFORCE SERVICE AGENT

Document Intake Agent

Snap the receipt. The claim fills itself.

The Document Intake Agent takes a warranty claim in the chat on your website. It checks the customer against their order, reads the receipt, the photo of the fault and the serial plate they send, and reads the receipt back for them to confirm. Only after their yes is anything saved. Then it matches the serial number to the product registered to them, checks the warranty terms you already keep in Salesforce, and hands your team a claim that is complete and ready to review.



2	2	275	22	89%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Checks who the customer is
The order number and the email they used, matched to the order in Salesforce before anything is opened or shown.

Saves only on a yes
It reads the values back. Only when the customer confirms are they written to the claim, and the reading stays beside them.

Checks the warranty
In warranty or not, from the warranty terms you already keep in Salesforce, recorded for the team to confirm.

Reads the receipt photo
Store, date, total and receipt number, read from a photo or PDF in the chat, even a creased, crumpled receipt.

Matches the serial plate
The serial number is read from a photo and matched to the product registered to that customer.

Leaves a full record
A complete claim, a timeline of every step, and quiet flags for a reused receipt, ready for the team to review.

THE RULES IT FOLLOWS

- **Never decides a claim**
  It never approves, rejects or promises a claim, a refund or a replacement; your team does.
- **Nothing saved without a yes**
  Every value it reads is read back, and saved only after the customer confirms it.
- **No IDs or bank cards**
  Photos of identity documents, bank statements or cards are deleted and nothing is kept from them.
- **Instructions in a file are ignored**
  Text printed inside an upload never changes what the agent does; it is noted for the team.

PROVEN IN A LIVE RUN

Three photos. The receipt, the fault and the serial plate, read in the chat.

One yes. Nothing is saved until the customer confirms what was read.

Never a decision. It never approves or rejects a claim; your team does.

WORKS WITH
Talks to customers

WHERE IT WORKS
Phone

RUNS ON
Agentforce, Salesforce Service Cloud, Messaging for In-App and Web, Prompt Builder

BEST FOR
Warranty and claims managers, customer service leaders, returns and after-sales teams, contact center operations, product support managers, Salesforce admins

INDUSTRIES
Consumer appliances, Consumer electronics, Home improvement and tools, Furniture and mattresses, Sporting goods and outdoor, Automotive parts and accessories

WHAT YOU NEED

- ✓ **Service Cloud**
  Cases, with your orders, products and registered products in Salesforce.
- ✓ **Agentforce**
  Agentforce for service, with messaging on your website.
- ✓ **Warranty terms**
  Your warranty periods in Salesforce's standard warranty records, or your sign-off to load them.
- ✓ **Sample documents**
  A few real receipts and serial-plate photos to test with.

Live. Recorded on a real Salesforce org and last validated Nov 24, 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