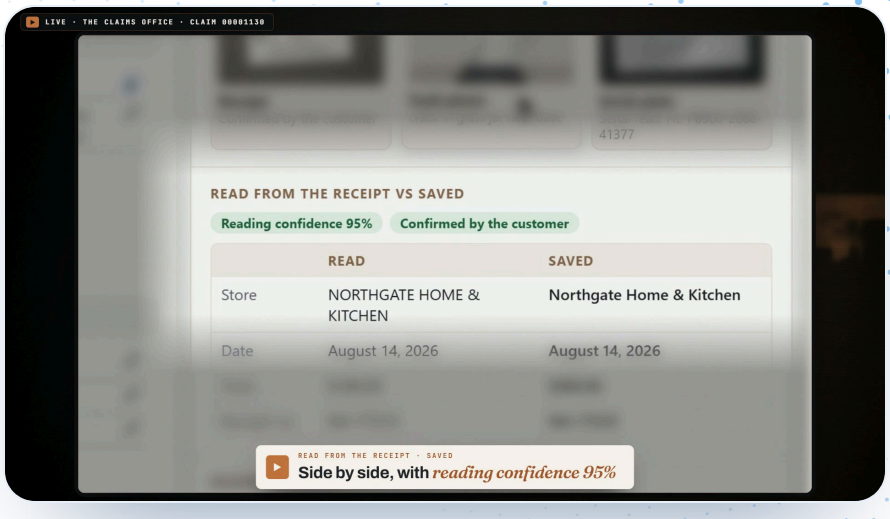
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · CUSTOMER SERVICE · NOVEMBER 2026

Snap the receipt. The claim fills itself.

Document Intake Agent. It 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.



STATUS
LIVE DEMO

WORKS WITH
Talks to customers

WHERE IT WORKS
Phone

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

The claim is easy. The paperwork is not.

A warranty claim usually arrives as an email with a blurry photo attached, or none at all. Someone downloads it, squints at the receipt, retypes the store, date and total, writes back for the serial number, and looks up whether the product is still covered. Two or three emails later the claim is finally complete, and the customer has been waiting the whole time.

- **A receipt photo nobody can read, and a request for a clearer one**
- **The serial number missing, so another email goes out**
- **Store, date and total retyped by hand, with the odd typo**
- **A receipt already used on another claim, noticed by luck**

THE COST Everything the team needs is in the customer's photos. Nobody should have to retype it.

WHAT IT DOES

Everything the Document Intake Agent handles.

01

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.

02

Reads the receipt photo

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

03

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.

04

Matches the serial plate

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

05

Checks the warranty

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

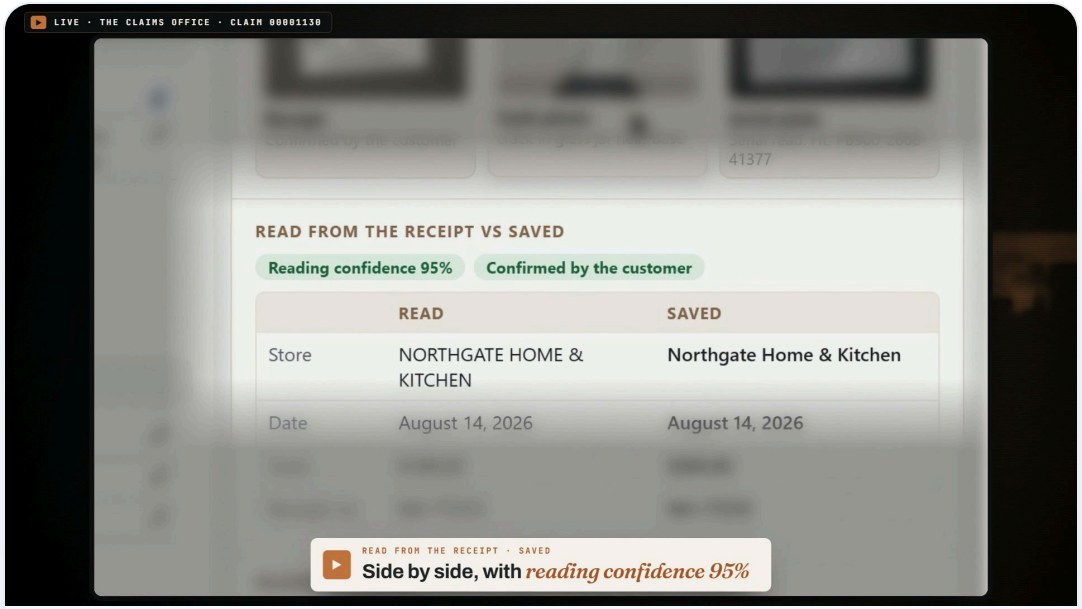
06

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.

PROOF

Recorded live on a real Salesforce org.



Watch the full run (3:13) at synconai.com/ai-agents/document-intake-agent

- **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.
- **Privacy first.** Photos of IDs or bank cards are deleted, never kept.

SHE STARTS A CLAIM
Matched to her order, claim opened.

THE RECEIPT, READ BACK
Read, not yet saved.

SAVED ON HER YES
Exactly what she confirmed.

FAULT PHOTO AND SERIAL PLATE
Complete and ready to review.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never decides a claim

It never approves, rejects or promises a claim, a refund or a replacement; your team does.

02 Nothing saved without a yes

Every value it reads is read back, and saved only after the customer confirms it.

03 No IDs or bank cards

Photos of identity documents, bank statements or cards are deleted and nothing is kept from them.

04 Instructions in a file are ignored

Text printed inside an upload never changes what the agent does; it is noted for the team.

05 Only their own claim

A customer sees and adds to their own claims, after the order number and email match.

06 Your rules, your words

File types, sizes, confidence levels and every sentence the agent says are settings and labels you control.

TESTED BY REPLAY Eight live scenarios on the real chat channel with real uploads before go-live: a crumpled receipt, an ID instead of a receipt, a reused receipt, printed instructions, two blurry photos, an old receipt, a status question and an unsupported file.

THE DIFFERENCE

An upload box collects files. This agent collects a complete claim.

WHEN	A CLAIM FORM OR AN EMAIL INBOX	THIS AGENT
The customer has a receipt	Attached to an email, retyped by staff	**Read in the chat and confirmed by the customer**
The photo is blurry	A reply asking for a better one, days later	**A tip on the spot; a person after two tries**
The serial number is needed	Another email to the customer	**Read from the plate and matched to their product**
Is it still covered?	Someone looks it up	**Checked against your warranty records for the team**
The receipt was used before	Noticed by luck, if at all	**Flagged quietly for review**
Someone sends an ID or a bank card	It sits in the inbox	**Deleted, nothing kept, receipt asked for instead**
The customer asks where it is	A call or another email	**Status in the chat, after checking who they are**

DELIVERY

Your products, your warranty rules, your claims.

1

Map your claims process

What a complete claim needs, your warranty terms, and when a person takes over.

2

Configure in your org

The chat on your website, your brand, your thresholds and your wording.

3

Test with real receipts

Your own receipt and serial-plate samples, replayed before go-live and before every change.

4

Go live and hand over

One product line first, then everything, 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 · Warranty terms · Sample documents

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NEXT STEP

Get the Document Intake 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/document-intake-agent

GLOBAL DELIVERY
United States · Australia · India

BUILT BY
SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER