CUSTOMER SERVICE · AGENTFORCE EMPLOYEE AGENT

Escalation Summary Agent

Gives a human agent a short, accurate briefing the moment a chat or case is handed over from an AI agent or another team.



The Escalation Summary Agent gives a human agent a short, accurate briefing the moment a chat or case is handed over from an AI agent or another team. It summarizes the history, the customer's sentiment, what has been tried and a suggested next step, and saves it on the Case. Customers never have to repeat themselves after a handoff.

2	6	1	2	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Summarize handoff
Create the structured five item summary when a case is escalated.

Answer questions about this case
Let the human agent ask follow-up questions in plain language.

THE RULES IT FOLLOWS

- **The agent writes internal notes only**
  It never contacts the customer and never changes Status or owner.
- Mask card numbers, passwords and government identifiers in the summary and in any answer.
- **Never state a cause or promise that is not in the record**
  Use Not stated instead.
- If the history exceeds 50 items, summarize the latest 50 and say so.

NOT INCLUDED

- Replying to the customer or changing case ownership.
- Sentiment trend dashboards beyond one report.
- Summaries for non-Case objects such as Opportunities.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Service Cloud, Messaging (for transcripts), Agentforce

BEST FOR
Tier 2 support agents, team leads, supervisors, service managers and account managers

INDUSTRIES
Cross-industry · Software companies · Telecommunications · Financial services · Insurance · Retail · Utilities · Managed IT services

WHAT YOU NEED

- ✓ Service Cloud with Messaging if chat transcripts are included.
- ✓ Your escalation triggers and queue names.

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