SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · CUSTOMER SERVICE · NOVEMBER 2026

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.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Escalation Summary Agent takes off your team.

WHAT IT DOES

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.

WHAT CHANGES

Customers never have to repeat themselves after a handoff.

A TYPICAL FIT

A SaaS support team where Tier 1 escalates to Tier 2.



WHO USES IT Tier 2 support agents, team leads, supervisors, service managers and account managers

WHAT IT DOES

Everything the Escalation Summary Agent handles.

01

Summarize handoff

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

02

Answer questions about this case

Let the human agent ask follow-up questions in plain language.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **The agent writes internal notes only**
It never contacts the customer and never changes Status or owner.

02 Mask card numbers, passwords and government identifiers in the summary and in any answer.

03 **Never state a cause or promise that is not in the record**
Use Not stated instead.

04 If the history exceeds 50 items, summarize the latest 50 and say so.

05 Sentiment is chosen from the fixed list and based only on the customer's own words.

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

NEXT STEP

Get the Escalation Summary 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

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THE AGENT

synconai.com/ai-agents/escalation-summary-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER