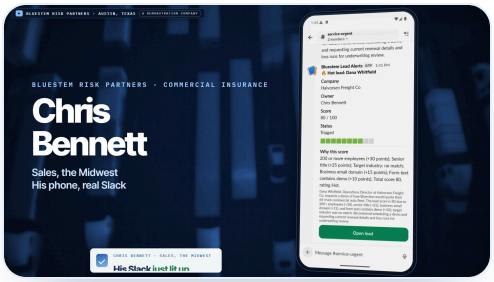
SALES AND REVENUE · AUTONOMOUS AGENT

Inbound Lead Triage Agent

Every lead, scored and routed.

The Inbound Lead Triage Agent reads every lead from your website form the moment it arrives and asks it the same five questions: is this an existing customer, a duplicate or spam, somewhere you work, something you do at a size you take, and how strong is the fit. Good leads are scored from your rule table, routed to the territory owner, who gets a Slack card within seconds and a reply drafted in their name with their next two free call times; the rest are closed with their reason.



6	15	273	52	96%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Reads every website lead
The moment your form creates the lead in Salesforce, and only leads from the forms you name.

Alerts the owner in Slack
A card with the score, the reasons and one Open lead button, seconds after the form.

Closes what is not a fit
Each with its reason; existing customers to their account owner, cold leads to nurture.

Checks, then scores
Customer, duplicate, spam, area, services and size first; then points from your rule table, every line shown.

Drafts the reply, times included
In the owner's name, with their next two free call times from the calendar, for the owner to send.

Answers the manager
The scorecard on request in the Agentforce panel, and every lead on the Inbound Desk.

THE RULES IT FOLLOWS

- **Your rules decide the score**
  The score comes from a rule table your team edits; words in the form never change it.
- **One email on its own**
  The only email the agent sends is the acknowledgement you approved; the personal reply stays a draft.
- **Triaged once**
  A lead that was already triaged is shown, never processed or emailed again.
- **A reason for every close**
  Every closed lead carries its reason: spam, duplicate, out of area, out of scope or below minimum size.

PROVEN IN A LIVE RUN

Every lead. Read the moment it arrives, and the right owner told in Slack within seconds.

Your rules. The score comes from your rule table, and every line of it is shown.

Drafted, not sent. Only the approved acknowledgement goes out; the personal reply, with real call times, waits for the owner.

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email

RUNS ON
Agentforce, Salesforce Sales Cloud, Web-to-Lead, Slack, Lightning Experience

BEST FOR
Sales managers, founders of small sales teams, sales development reps, marketing teams, revenue operations, Salesforce admins

INDUSTRIES
Commercial insurance brokers, B2B software and SaaS, Professional services, Manufacturing, Logistics and transportation, Financial services

WHAT YOU NEED

- ✓ **Sales Cloud**
  Leads in Salesforce from your website form (Web-to-Lead), with owners and territories.
- ✓ **Agentforce**
  Agentforce for employees, in Lightning Experience.
- ✓ **Slack (optional)**
  A Slack webhook for the channel where owners get their alerts.
- ✓ **Your rules**
  Your sign-off on the score table, territories, service area, services and minimum size.

Live. Recorded on a real Salesforce org and last validated Nov 26, 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