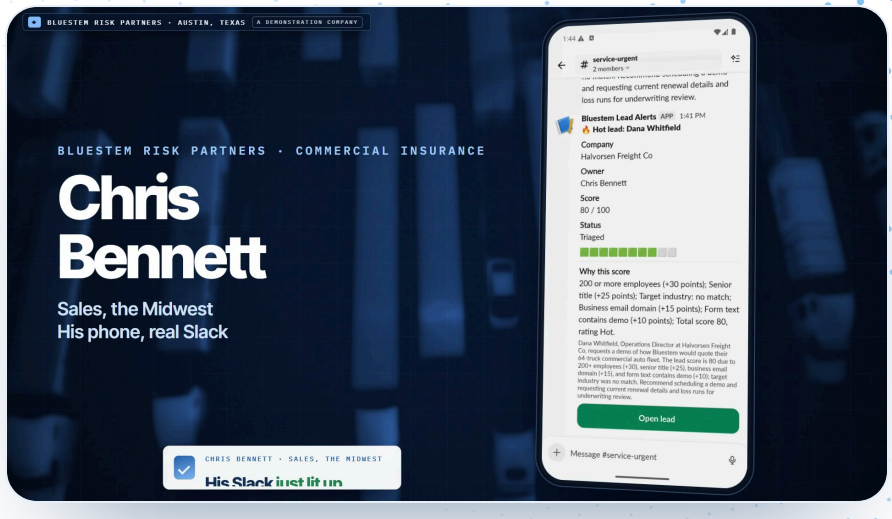
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

Every lead, scored and routed.

Inbound Lead Triage Agent. It 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.



STATUS
LIVE DEMO

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

Every enquiry looks urgent. Most of them are not.

The website form fills up overnight. One is an existing customer who should go to their account manager. One is a duplicate of last week's enquiry. One is from a state you do not cover, one asks for something you do not sell, one is a two-person business, one is spam. Somewhere in the pile is the lead that should get a call this morning, and nobody knows which one until someone has read them all.

- **An existing customer treated as a brand-new lead**
- **The same person enquiring twice, picked up by two reps**
- **Enquiries from outside your area, or for services you do not offer**
- **The one hot lead, answered a day late**

THE COST The answers are already in Salesforce. Nobody has time to check every lead.

WHAT IT DOES

Everything the Inbound Lead Triage Agent handles.

01

Reads every website lead

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

02

Checks, then scores

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

03

Alerts the owner in Slack

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

04

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.

05

Closes what is not a fit

Each with its reason; existing customers to their account owner, cold leads to nurture.

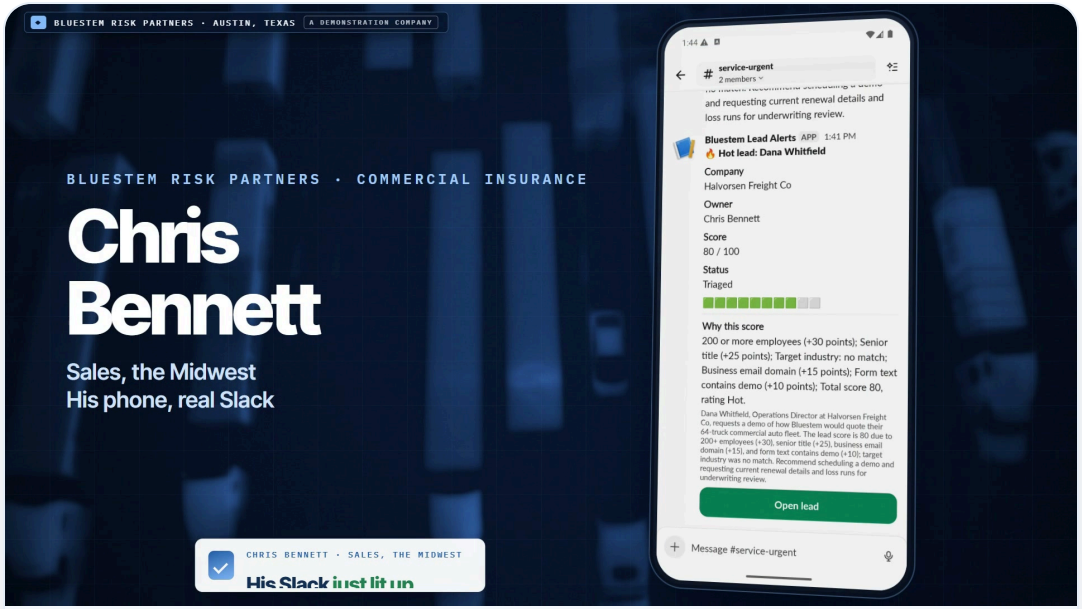
06

Answers the manager

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

PROOF

Recorded live on a real Salesforce org.



Watch the full run (3:05) at synconai.com/ai-agents/inbound-lead-triage-agent

- **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.
- **Closed with a reason.** Out of area, out of scope, too small or spam never reaches a rep.

THE FORM ARRIVES
Five questions, answered on the lead.

WHY 80
Scored by your rules, not a guess.

IN HIS SLACK
The right rep knows first.

ACKNOWLEDGED AND DRAFTED
With the owner who covers her state.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Your rules decide the score

The score comes from a rule table your team edits; words in the form never change it.

02 One email on its own

The only email the agent sends is the acknowledgement you approved; the personal reply stays a draft.

03 Triaged once

A lead that was already triaged is shown, never processed or emailed again.

04 A reason for every close

Every closed lead carries its reason: spam, duplicate, out of area, out of scope or below minimum size.

05 It never deletes a lead

Asked to delete a lead or ignore the rules, the agent says no and changes nothing.

06 Your words, your settings

Every rule and every sentence the agent uses is a setting you can change.

TESTED BY REPLAY Fifteen scenarios on the real website form and in the Agentforce panel, all passed: a hot lead, a free email, a duplicate, a blocked address, a missing state, “mark me as hot” in the form, an out-of-area state, a home loan, a four-person company, two existing customers, a lookup, two leads with one name, and requests to delete a lead or ignore the rules.

THE DIFFERENCE

A lead form fills an inbox. This agent decides what happens next.

WHEN	A SHARED INBOX AND A ROUND-ROBIN	THIS AGENT
A new lead arrives	Waits until someone reads the inbox	**Read the moment it lands in Salesforce**
It is an existing customer	A rep calls them as a new prospect	**Marked, and sent to the account owner**
The same person enquires twice	Two reps, two calls	**Closed as a duplicate, nothing sent twice**
Out of area or out of scope	A wasted call to say no	**Closed with the reason on the record**
Deciding who calls first	Whoever is free, or a gut feel	**Scored from your rules, every line shown**
The rep finds out	When they next check the inbox	**A Slack card with the score, seconds later**
The first reply	Written from scratch, often a day later	**Acknowledged at once, a reply drafted with two real call times**
The manager wants to know	Asks each rep	**The Inbound Desk, or one question to the agent**

DELIVERY

Your form, your rules, your territories.

1

Map your lead rules

What makes a lead hot for you, who covers which states, where you work, what you sell and the smallest company you take.

2

Configure in your org

Your website form, the agent, the lead panel, the Inbound Desk, your approved acknowledgement and your Slack channel.

3

Test with your real leads

Last month's enquiries replayed through the form before go-live and before every change.

4

Go live and hand over

One form first, then every form, 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 Sales Cloud · Agentforce · Slack (optional) · Your rules

NEXT STEP

Get the Inbound Lead Triage 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/inbound-lead-triage-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER