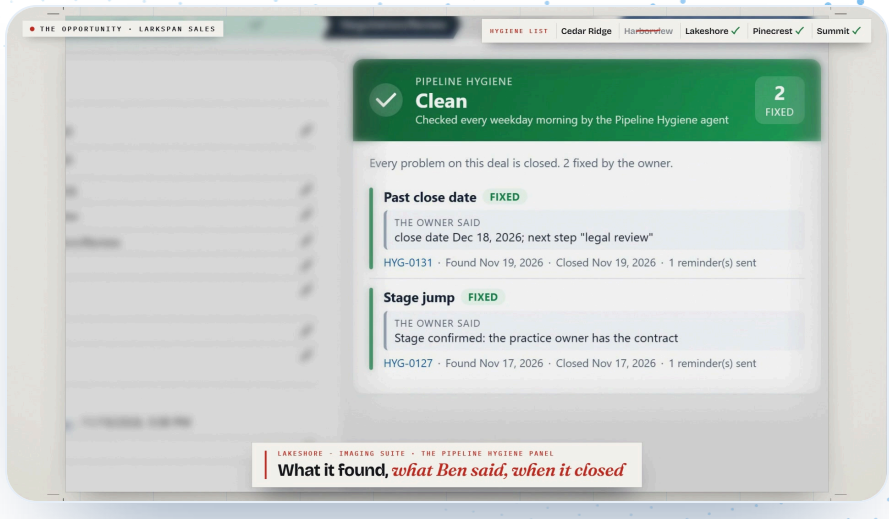
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

Your forecast, proofread every morning.

Pipeline Hygiene Agent. It reads every open opportunity each weekday morning. It finds past close dates, quiet late-stage deals, missing next steps, stage jumps and amounts set to zero or changed by more than half. It tells each owner what is on their list, in Slack and in Salesforce, and the owner fixes it in one sentence in the Agentforce panel. What the owner says is what is saved; far-out dates are confirmed twice and flagged for the manager.



STATUS
● LIVE DEMO

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

Nobody made it up. It just got old.

A forecast goes wrong one small field at a time. A close date passes and nobody moves it. A next step is never written down. A deal skips half its stages in one click. The manager finds out on the forecast call, by asking each rep about each deal, and the spreadsheet of "please update" goes round again.

- **A close date that passed in October, still open**
- **A next step nobody wrote down**
- **A deal that jumped from prospecting to proposal in one edit**
- **A quiet late-stage deal, or an amount halved overnight**

THE COST Every problem is already visible in Salesforce. Nobody has time to look every morning.

WHAT IT DOES

Everything the Pipeline Hygiene Agent handles.

01

Reads every open deal

Each weekday morning: past close dates, quiet late-stage deals, missing next steps, stage jumps of two or more steps, amounts set to zero or changed by more than half.

02

Tells each owner

What is on their list, in Slack and in Salesforce, at most five problems in a message and one contact per deal every three days.

03

A fix in one sentence

The owner says what really happened in the Agentforce panel, and exactly that is saved to the opportunity.

04

Far dates asked twice

A close date more than 90 days out is confirmed once more and flagged for the manager to review.

05

Dismiss with a reason

Duplicate, not a deal, customer paused or other, kept on the record. After two reminders and three days of silence, the manager is told.

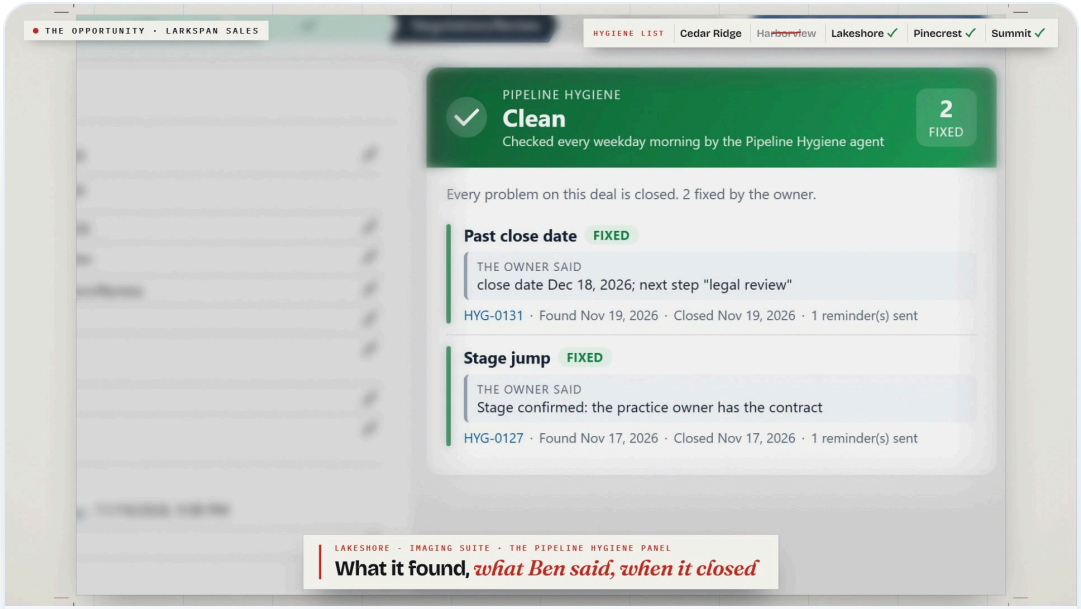
06

Scores and the deal panel

Hygiene scores per owner, fixed against raised over 30 days, lowest first; and the Pipeline Hygiene panel on every opportunity.

PROOF

Recorded live on a real Salesforce org.



Watch the full run (2:37) at synconai.com/ai-agents/pipeline-hygiene-agent

- **Every morning.** Every open deal read each weekday, before the forecast call.
- **One sentence.** The owner says the fix in their own words; that is what is saved.
- **Never the amount.** It never changes an amount and never closes a deal from a chat.
- **The manager sees it.** Far dates flagged, silence escalated, scores per owner.

THE HYGIENE LIST
Found in his own opportunities.

A FIX IN ONE SENTENCE
Saved exactly as he said it.

A FAR DATE, ASKED TWICE
Confirmed, saved and flagged for the manager.

STAGE JUMPS AND DUPLICATES
One line each, with the reason on the record.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never changes an amount
It flags an amount set to zero or changed by more than half; only the owner edits it.

02 Never closes a deal from a chat
For a closed stage it sends a link to the record, and the owner closes it there.

03 Writes only what the owner said
The close date, next step or stage the owner gave, and nothing else.

04 Polite by design
At most five problems in a message and one contact per deal every three days.

05 Counts and names only
The manager summary shows how many and whose, never deal details.

06 Your rules, your words
Every threshold is a setting and every word the agent uses is a label you can change.

TESTED BY REPLAY Real conversations replayed in Agentforce testing before every release: the hygiene list, fixes, far dates, stage changes, dismissals, scores and requests it should not take on.

THE DIFFERENCE

A report lists stale deals. This agent gets them fixed.

WHEN	A PIPELINE REPORT AND A MANAGER	THIS AGENT
A close date passes	Found on the forecast call	**On the owner's list the next weekday morning**
A late-stage deal goes quiet	Nobody notices for weeks	**Flagged after the days you set**
A deal skips stages in one click	Invisible in a list view	**Caught from the stage history**
An amount drops to zero or halves	Spotted when the total looks wrong	**Flagged; the agent never edits the amount**
The owner knows the fix	Open the record, find the field, save	**One sentence in the Agentforce panel**
A date is pushed far out	The deal quietly leaves the quarter	**Confirmed twice, flagged for the manager**
Nobody answers	The manager chases each rep	**Two reminders, then the manager is told**

DELIVERY

Your stages, your rules, your pipeline.

1

Map your sales process

Your stages, what late stage means, and the thresholds your managers trust.

2

Configure in your org

The agent in the Agentforce panel, the morning message in Slack, the deal panel and your settings and wording.

3

Test with your real pipeline

Last month's deals replayed before go-live and before every change.

4

Go live and hand over

One team first, then everyone, 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 (recommended) · Your thresholds

NEXT STEP

Get the Pipeline Hygiene 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/pipeline-hygiene-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER