INDUSTRY AGENTS · AGENTFORCE SERVICE AGENT

Professional Services Intake Agent

Captures a prospect's matter for a law, accounting or consulting firm, runs a conflict pre-check and books the first consultation.

A client-facing agent for law, accounting and consulting firms that captures a prospect's matter, collects names for an internal conflict pre-check, sets up the engagement records, requests the right documents and books an initial consultation.



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SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Matter capture
Understand the need and service line.

Conflict pre-check
Collect related party names and run the internal check silently.

Engagement setup
Create records and send the document request.

Book consultation
Offer and confirm an initial consultation.

THE RULES IT FOLLOWS

- Never give legal, tax or accounting advice or predict outcomes. Say a qualified professional advises after the consultation.
- **Collect the minimum facts needed**
  Ask the prospect not to send privileged detail or sensitive documents in chat.
- Show a short confidentiality notice at the start of the chat.
- Escalate urgent court, regulator or deadline matters to a human immediately.

NOT INCLUDED

- Engagement letters and e-signature.
- Time recording and billing.
- Formal conflict clearance (partners decide).

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, Email

RUNS ON
Sales Cloud, Agentforce, Experience Cloud (optional for uploads)

BEST FOR
Prospective clients, intake coordinators, partners, practice managers and associates

INDUSTRIES
Law firms · Accounting practices · Advisory consultancies · Financial planners · Tax advisers · Immigration services · Engineering consultancies · Architecture practices

WHAT YOU NEED

- ✓ Sales Cloud, Messaging and Agentforce enabled.
- ✓ Service lines, checklists, conflict matching rules, partner calendars and a reviewed confidentiality notice.

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