SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · INDUSTRY AGENTS · NOVEMBER 2026

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.



STATUS
COMING SOON

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat, Email

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Professional Services Intake Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT Prospective clients, intake coordinators, partners, practice managers and associates

WHAT IT DOES

Everything the Professional Services Intake Agent handles.

01

Matter capture

Understand the need and service line.

02

Conflict pre-check

Collect related party names and run the internal check silently.

03

Engagement setup

Create records and send the document request.

04

Book consultation

Offer and confirm an initial consultation.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never give legal, tax or accounting advice or predict outcomes. Say a qualified professional advises after the consultation.

02 **Collect the minimum facts needed**
Ask the prospect not to send privileged detail or sensitive documents in chat.

03 Show a short confidentiality notice at the start of the chat.

04 Escalate urgent court, regulator or deadline matters to a human immediately.

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

NEXT STEP

Get the Professional Services Intake 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/professional-services-intake-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER