AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

Prospect-to-Offer Matching Agent

Matches a prospect to the best offers in a catalog (service packages, partners or investment vehicles) using fixed filters and weights.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Prospect-to-Offer Matching Agent takes off your team.

WHAT IT DOES

An Agentforce agent that matches a prospect to the best offers in a catalog (service packages, partners or investment vehicles) using fixed filters and weights, then writes a short rationale per match. The user enters a prospect profile and receives a ranked shortlist with reasons.

WHAT CHANGES

A repeatable matching process instead of manual spreadsheet filtering.



WHO USES IT Business development, partnership managers, sales operations, account executives and alliance teams

WHAT IT DOES

Everything the Prospect-to-Offer Matching Agent handles.

01

Profile capture

Gathers and confirms the prospect profile.

02

Match and rank

Filters, scores, explains.

03

Match follow-up

Explains, reruns, saves.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 The rationale may state only facts present in the profile or the offer record; missing facts are written as "not recorded".

02 The agent never contacts prospects or offer owners.

03 Scores follow the fixed weights exactly.

04 Hard filters are never bypassed.

05 Runs and results are stored for audit.

06 Shortlist returns in under 20 seconds for 25 offers.

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 Your offer catalog in a loadable format. · Agreement on the weights and the minimum score. · Data 360 only if the catalog exceeds a few thousand records.

NEXT STEP

Get the Prospect-to-Offer Matching 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/prospect-to-offer-matching-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER