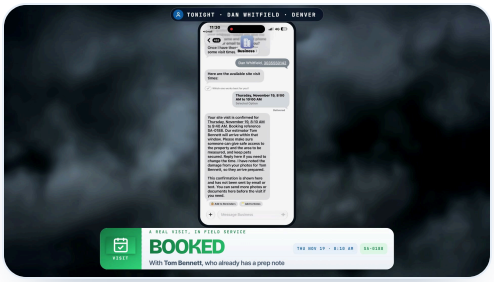
FIELD SERVICE AND OPERATIONS · AGENTFORCE SERVICE AGENT

Quote and Site Visit Agent

Every roof answered, before the office opened.

The Quote and Site Visit Agent answers homeowners in Apple Messages and your website chat, at any hour. It reads the photos and documents they send, gives an indicative range from your own rates, books a real estimator visit in Salesforce Field Service, and prepares the estimator before they drive out.



4	16	187	405	90%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Answered at any hour
Apple Messages for Business and your website chat, in the customer's own words.

It reads what they send
Photos and documents, each once; key facts copied exactly.

Booked with proof
"Booked" only when Salesforce confirms the visit, with its reference.

An indicative range
From your price bands, in your wording, never a guarantee.

Real visit times
Up to three windows from Field Service, ranked by your scheduling policy.

A prepared estimator
The damage and the claim noted before the visit, even when sent late.

THE RULES IT FOLLOWS

- **Indicative, never a promise**
  Every figure comes from your price bands with "final price is confirmed after the site visit".
- **Booked only when it is**
  The agent says "booked" only after Salesforce confirms the visit and its estimator.
- **What it saw, nothing more**
  Files are described from what the agent read, once each; another company's price is never repeated.
- **People for the big ones**
  Large or unusual jobs, and anyone who asks for a person, go to your sales team.

PROVEN IN A LIVE RUN

Answered in seconds. In the customer's own words, on the phone they already have.

It reads what they send. Photos and documents, each described once; a claim number copied exactly.

Your rates, never a promise. An indicative range from your price bands, in fixed wording.

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat

RUNS ON
Agentforce, Salesforce Field Service, Apple Messages for Business

BEST FOR
Roofing and home-improvement businesses, estimators, owners, office and sales teams, and storm-response crews

INDUSTRIES
Roofing and exteriors, Solar and home improvement, Storm and restoration work, Windows, siding and gutters, Remodeling and renovation, HVAC replacement and installation

WHAT YOU NEED

- ✓ **Field Service**
  A territory, a site-visit work type and estimators set up for scheduling.
- ✓ **Messaging**
  Apple Messages for Business or your website chat, with Agentforce.
- ✓ **Your price bands**
  A low and high rate per unit for each service.
- ✓ **Your service area**
  The ZIP or postal codes you cover.

Live. Recorded on a real Salesforce org and last validated Nov 11, 2026.

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