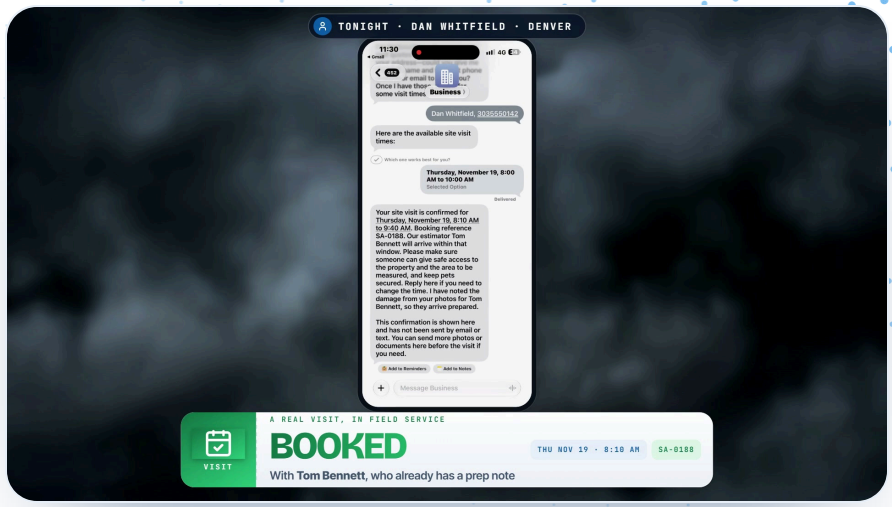
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · FIELD SERVICE AND OPERATIONS · NOVEMBER 2026

Every roof answered, before the office opened.

Quote and Site Visit Agent. It 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.



STATUS
LIVE DEMO

WORKS WITH
Talks to customers

WHERE IT WORKS
Website chat

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

After a storm, the first roofer to answer wins the work.

Homeowners message at night, the office opens at eight, and by then they have asked three other roofers. Every enquiry needs a price conversation, a visit, and someone who knows what was in the photos.

- **The job, to whoever answered first**
- **Calls back and forth for a visit time**
- **An estimator who arrives knowing nothing**

THE COST The morning starts with a full voicemail.

WHAT IT DOES

Everything the Quote and Site Visit Agent handles.

01
Answered at any hour
Apple Messages for Business and your website chat, in the customer's own words.

02
An indicative range
From your price bands, in your wording, never a guarantee.

03
It reads what they send
Photos and documents, each once; key facts copied exactly.

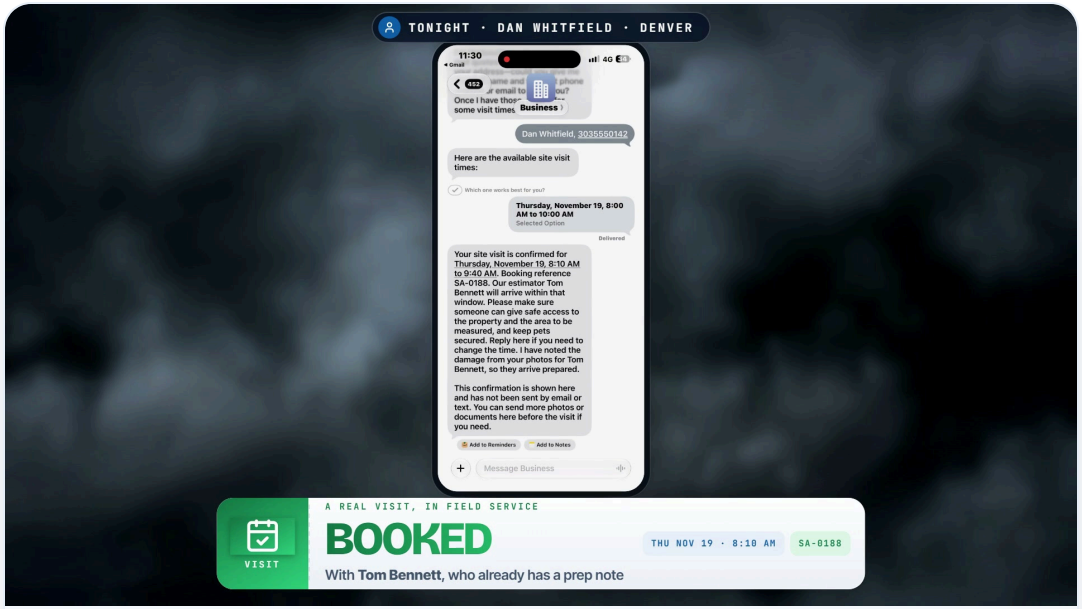
04
Real visit times
Up to three windows from Field Service, ranked by your scheduling policy.

05
Booked with proof
"Booked" only when Salesforce confirms the visit, with its reference.

06
A prepared estimator
The damage and the claim noted before the visit, even when sent late.

PROOF

Recorded live on a real Salesforce org.



Watch the full run (3:28) at synconai.com/ai-agents/quote-to-site-visit-agent

- **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.
- **A prepared estimator.** Real times from Field Service; the damage and the claim noted before the visit.

A RANGE IN SECONDS
A range from your rates, not a guess.

THE PHOTOS
What the photos show, noted for the estimator.

BOOKED
A real visit in Field Service.

THE INSURER'S LETTER
Sent after booking, still saved.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Indicative, never a promise**

Every figure comes from your price bands with "final price is confirmed after the site visit".

02 **Booked only when it is**

The agent says "booked" only after Salesforce confirms the visit and its estimator.

03 **What it saw, nothing more**

Files are described from what the agent read, once each; another company's price is never repeated.

04 **People for the big ones**

Large or unusual jobs, and anyone who asks for a person, go to your sales team.

05 **Safe and private**

Nobody is asked to climb a roof for a photo, and other customers are never mentioned.

TESTED BY REPLAY Homeowner conversations, replayed before every release: a quote and booking, roof and gutters with a correction, vague answers, out of the area, an upset customer, a very large job, an unsafe roof, insurance questions.

THE DIFFERENCE

A chatbot takes a message. This agent quotes and books.

WHEN	A TYPICAL WEBSITE CHATBOT	THIS AGENT
A homeowner writes at night	"We'll get back to you"	**An answer in seconds, in the chat they already use**
They send photos	Ignored, or "please describe them"	**Each photo read and noted for the estimator**
They ask how much	No answer, or a made-up number	**An indicative range from your own rates, in fixed wording**
They want a visit	A call back to find a time	**Three real times from your schedule, booked with a reference**
An insurance letter arrives	Lost in an inbox	**Claim details saved for the estimator**
The next morning	A list of messages to return	**Every enquiry on a map, quoted and booked**

DELIVERY

Your rates, your area, your wording.

1

Map your quoting

Your services and price bands, the area you cover, who estimates and who sells.

2

Configure in your org

The agent, your channels, the Storm Board and the customer pages, in your wording.

3

Test with your customers' words

Real enquiries from your business, replayed before go-live and before every change.

4

Go live and hand over

A pilot in one area, then everywhere, 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 Field Service · Messaging · Your price bands · Your service area

NEXT STEP

Get the Quote and Site Visit 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/quote-to-site-visit-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER