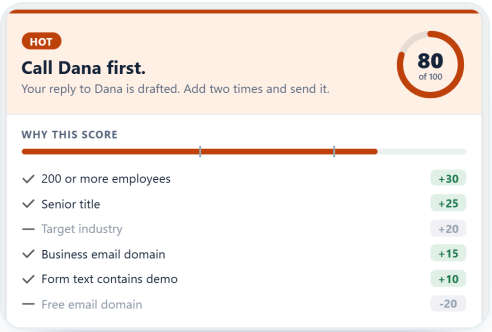
ADMIN AND SECURITY GUIDE · VERSION 1.1

Set up Lead to Deal

Installed and running in about 30 minutes.

For the Salesforce admin who installs Lead to Deal, and for security reviewers. Install the free package, give access, set your rules in Setup, connect Slack if you use it, add the three Agentforce agents in one step, then send a test lead.

L2D Lead to Deal



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MINUTES TO SET UP	AGENTFORCE AGENTS	RULE TYPES IN SETUP	FLOWS TO SWITCH ON	CODE CHANGES

THE SETUP, STEP BY STEP

1 · Check the requirements
Sales Cloud Enterprise or above, Agentforce and Einstein generative AI.

2 · Install and give access
Admins Only, then the Lead to Deal Admin permission set.

3 · Point it at your web form
Only leads with a Web Form value are triaged.

4 · Set your rules
Score points, territories, service areas and thresholds in custom metadata.

5 · Connect Slack
Optional. Salesforce's own Slack action; no webhook, no token.

6 · Add the three agents
One step: the installer, or the Lead to Deal Setup page.

7 · Turn on the flows
Triage on create; daily scans and digests; a weekly summary.

8 · Check, then test
Run the configuration checks and send a test lead.

WHAT THE THREE AGENTS DO

- **Inbound Lead Triage**
  Answers "how did this lead score?" and "what happened to this lead?" from the records.
- **Meeting Prep**
  Builds the brief for a meeting: who is in the room, the risks, the last contact.
- **Pipeline Hygiene**
  Shows each owner's pipeline problems, applies fixes after the owner confirms, and scores each owner.

PACKAGE
Lead to Deal, managed, namespace leadtodeal

PRICE
Free. Salesforce bills Agentforce and Einstein generative AI usage under your own agreement.

INSTALL FOR
Admins Only

RUNS AS
Record-triggered and scheduled flows, Apex actions, prompt templates

AGENTS
Added after install, in one step

WHAT YOU NEED

- ✓ **Sales Cloud**
  Enterprise Edition or above.
- ✓ **Agentforce**
  With Einstein generative AI turned on.
- ✓ **Slack**
  Optional, for hot-lead cards and pipeline messages.
- ✓ **Your rules**
  What you sell, your territories and your service area.

Published by SynconAI.

Free on AgentExchange: free guided setup, too.

Ask through the listing and we install the package, your rules and the three agents with you.

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PART 1 · INSTALL

Before you start, and the first ten minutes.

1 Check what you need

YOU NEED	WHY	WHERE
Sales Cloud, Enterprise Edition or above	Leads, opportunities, activities	**Your edition**
Agentforce and Einstein generative AI turned on	Prompt templates (summary, fit check, draft reply) and the agents	**Setup > Einstein Setup; Setup > Agentforce Agents**
Slack OPTIONAL	Hot-lead cards and pipeline messages	**Setup > Slack**
Quotes OPTIONAL	Meeting briefs show the latest quote when Quotes are on	**Setup > Quote Settings**
Opportunity field history OPTIONAL	Stage-skip and amount-jump rules read it; without it those two rules find nothing	**Object Manager > Opportunity > Fields & Relationships > Set History Tracking (Stage, Amount)**

2 Install and give access

1. Install the package for **Admins Only**.
2. Assign the **Lead to Deal Admin** permission set to your admins and to every rep and manager who uses the agents, the Lead Triage panel, the Inbound Desk or the Deal Hygiene panel.
3. Open the **Lead to Deal** app from the App Launcher.

3 Tell it which web forms to triage

1. On your Web-to-Lead form, add a hidden field for **Web Form** (`Web_Form__c`) with the value `website` . Only leads with a Web Form value are triaged, so leads from other teams are never touched.
2. To use another value, or several forms, change **Lead Triage Setting > Web_Forms** (comma-separated).

COST Lead to Deal is free. Salesforce bills Agentforce and Einstein generative AI usage (Flex Credits or conversations) separately, under your own Salesforce agreement.

PART 1 · CONFIGURE

Your rules, in Setup.

Every rule is a custom metadata record with its own page layout. No code changes are needed.

4 Set your rules

SETUP > CUSTOM METADATA TYPES

SETTING TYPE	WHAT IT CONTROLS	SHIPS WITH
Lead Score Rule	Points for employee count, title, email domain, industry, words in the request	**Six example rules: edit the points and values**
Lead Triage Setting	Hot and warm thresholds, minimum size, free email domains, blocked addresses, services offered, business description, reply-time rules, Slack channel	**Safe defaults; services and Slack channel blank**
Lead Territory	Which active user owns each state or country. Enter the state and country as they appear on your leads (for example `OH` or `Ohio`); matching ignores case	**One Default row with no owner, so the current owner (for example from your lead assignment rules) is kept**
Service Area	Which states you serve (In Area) and which you do not	**None: no lead is ever closed as out of area until you add rows**
Meeting Prep Setting	Look-back windows, renewal window, how many contacts, cases and meetings a brief shows	**Defaults**
Pipeline Hygiene Setting	Stale days, stages that need a next step, close-date and amount rules, record types to skip, reminder limits	**Defaults**

FILL IN AT LEAST

- **Lead Triage Setting > Services_Offered**
  What you sell, comma-separated. While it is blank, every enquiry counts as in scope.
- **Lead Triage Setting > Business_Description**
  How the fit check should describe your company, for example “a commercial insurance broker”.
- **Lead Territory**
  One row per state or country with the owner’s username. Inactive users are skipped.

NEW IN 1.1: THE SETTINGS

LEAD TRIAGE SETTING · ROUND_ROBIN_GROUP
The public group for backup routing when no territory owner matches. Window: Round_Robin_Window_Days (7).

LEAD TRIAGE SETTING · SPEED_TO_LEAD_MINUTES
30. A routed hot or warm lead still at Open - Not Contacted is re-alerted in Slack once.

PIPELINE HYGIENE SETTING · STUCK_STAGE_DAYS
60. Deals in one stage this long are flagged.

MEETING PREP SETTING · AUTO_BRIEF_BEFORE_MEETING
On. The brief is sent as a Salesforce notification about 20–30 minutes before a meeting on an account.

NEW IN 1.1 Every routed lead now records its **Routing Reason**: territory, default territory, round robin or kept owner.

PART 1 · CONNECT

Slack, then the three agents.

5 Slack (optional, no secrets)

SETUP > SLACK

Lead to Deal posts to Slack with Salesforce's own **Send Slack Message** action. There is no webhook, no token and no external endpoint in the package.

1. Connect Salesforce to Slack: Setup > Slack > Slack setup, and install the Salesforce app for Slack in your workspace.
2. Assign the Slack permission sets your org uses for Slack actions in flows (for example **Sales Cloud for Slack** or **Slack Service User**) to the user that runs the automation.
3. In Slack, invite the Salesforce app to the channel: `/invite @Salesforce`.
4. Copy the channel ID (channel name > About > Channel ID) into:
   - **Lead Triage Setting > Slack_Channel_Id** for hot and warm lead cards and the disqualification digest;
   - **Pipeline Hygiene Setting > Slack_Channel_Sales_Pipeline** for escalations and the manager summary.
5. Leave a channel blank to switch that Slack post off. A Slack error never stops the triage.

6 Add the three agents (one step)

Lead to Deal is built for three Agentforce agents: Inbound Lead Triage, Meeting Prep and Pipeline Hygiene. Salesforce does not yet let a package carry Agent Script agents, so the agents are added in one step after the package is installed. Pick one route:

ROUTE 1 · ABOUT 3 MINUTES

Installer script

With Salesforce CLI 2.120 or later. It deploys the three Agent Scripts, publishes and activates each agent, and gives you the **Lead to Deal Agent Access** permission set.

ROUTE 2

Lead to Deal Setup page

App Launcher > Lead to Deal > Lead to Deal Setup. Copy each agent's script (already namespaced), then in Agentforce Builder choose **New Agent > From script**, paste, save, publish and activate.

ROUTE 3

Free guided setup

Ask SynconAI through the listing and we install the agents with you.

```
./scripts/install-agents.ps1 -TargetOrg <your org alias> -Namespace leadtodeal     (Windows)
./scripts/install-agents.sh <your org alias> leadtodeal                            (Mac, Linux)
Add -AssignTo user1@x.com,user2@x.com to give the agents to more users.
```

AGENTS IN SLACK Optional: connect each agent to Slack in Agentforce Builder (Connections > Slack) after the Slack setup above, and add it to the channels or direct messages where your reps work.

PART 1 · GO LIVE

Switch it on, then prove it.

7 Turn on the schedules

SETUP > FLOWS

Check that these flows are active and set their start time to suit your team.

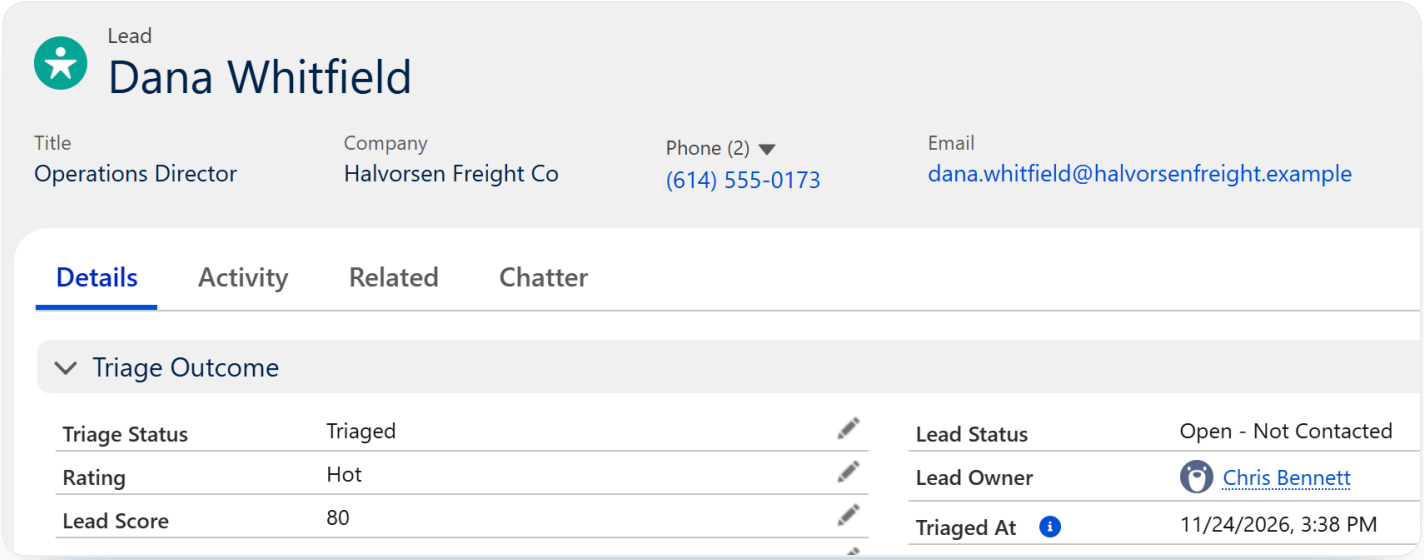
FLOW	RUNS	DOES
Lead Triage Start	When a web-form lead is created	**Runs the full triage in the background**
Hygiene Daily Scan	Daily	**Finds pipeline problems and messages each owner**
Escalate Stale Issues	Daily	**Escalates problems that stayed open past the reminder limit**
Disqualification Digest	Daily	**Posts the leads that were closed, with their reasons**
Post Manager Summary	Weekly	**Posts the pipeline hygiene summary to the manager channel**

8 Check your setup

Run the configuration checks from the Lead Triage panel and the Deal Hygiene panel, or ask the agents "check my setup". They list every missing or invalid setting.

9 Test it

Submit your web form with a test lead. Within a minute the lead shows a score, a reason, an owner, a summary and (for hot and warm leads) a draft reply task with two free times from the owner's calendar. Delete the test lead afterwards.



What a passing test looks like: the lead is triaged, rated, scored and given an owner.

PART 2 · THE AGENTS

Three employee agents, one set of actions.

The package ships every action, flow, prompt template, page and setting the agents use. The background work never depends on an agent: the triage runs as a record-triggered flow, and the pipeline scan and digests run as scheduled flows. The agents let people ask about that work in Agentforce, in Salesforce or in Slack.

Inbound Lead Triage EMPLOYEE AGENT

Answers "how did this lead score?", "what happened to the lead from Northwind?" and "triage this lead again" from the records.

TOPIC	INSTRUCTIONS (SHORT)	ACTIONS
Lead look-up	Find the lead by name, email or Id. Never guess.	Find Lead (`LeadFinder`)
Lead outcome	Say what happened to the lead, word for word from the action.	Finish Lead Triage (`LeadTriageOutcome`), Lead Scorecard (`LeadScorecardAction`)
Score explanation	Explain the score from the scorecard only. A request to change a score is refused: scores come from the rule table.	Lead Scorecard

Meeting Prep EMPLOYEE AGENT

"Prep me for my meeting with Acme."

TOPIC	INSTRUCTIONS (SHORT)	ACTIONS
Meeting brief	Find the person's meeting, confirm it, build the brief, repeat it word for word, show the card.	Find Meeting (`FindMeetingAction`), Build Meeting Brief (`BuildMeetingBriefAction`), Show Meeting Brief Card (`ShowMeetingBriefCardAction`)
Prep task	Create the prep task only when the person asks.	Create Prep Task (`CreatePrepTaskAction`), confirmation required

Pipeline Hygiene EMPLOYEE AGENT

"What's wrong with my pipeline?", "move the Acme close date to 15 January", "hygiene scores".

TOPIC	INSTRUCTIONS (SHORT)	ACTIONS
Issue detection	Scan only when asked.	Scan Pipeline (`HygieneScanAction`)
Owner follow-up	Find the opportunity, take the fix or a dismissal with a reason, apply it only after the owner confirms.	Find Issue (`HygieneFindIssueAction`), Apply Reply (`HygieneReplyAction`), confirmation required; My List (`HygieneMyListAction`)
Manager summary	Show each owner's issues and score, lowest first.	Hygiene Scorecard (`HygieneScorecardAction`), Board Card (`HygieneBoardCardAction`)

PART 3 · FOR SECURITY REVIEWERS

The rules every agent follows.

AGENT RULES

- **Grounded answers**
  Every number, date and name the agent says comes from an action. The agent repeats it; it does not compose it.
- **Confirmation before change**
  Actions that change data or send something (Create Prep Task, Apply Reply) require confirmation.
- **Untrusted text stays data**
  Text a lead or a customer typed is treated as information, never as instructions.
- **Least access**
  Assign Lead to Deal Admin (or a narrower permission set) to the agent user and to the people who use the agent.

HOW THE AGENTS ARE DELIVERED

Salesforce cannot package Agent Script agents yet, and agent templates cannot be made from Agent Script agents: `sf agent generate template` refuses them (checked 27 Nov 2026 with plugin-agent 2.4.0, the latest). So the package ships every action, flow, prompt template and setting, and the agents are added in one step afterwards. The Agent Script files are in `agents/`; `scripts/install-agents` deploys, publishes and activates them.

Proved on 27 Nov 2026 in a fresh org with the package installed: the installer published and activated all three agents, and each answered a real conversation (`docs/proof/agent-previews.txt`).

SECURITY AT A GLANCE

SLACK
Salesforce's own Send Slack Message action. No webhook, no token, no external endpoint in the package.

CHANGES
Pipeline fixes apply only after the owner confirms. Personal replies stay drafts.

SCORES
Come from the rule table. A request to change a score is refused.

CONFIGURATION
Custom metadata records in Setup. No code changes.

BACKGROUND WORK
Record-triggered and scheduled flows. None of it depends on an agent.

ACCESS
Lead to Deal Admin; Lead to Deal Agent Access for agent users.

RELEASE CHECKS, VERSION 1.0.0.8

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CODE ANALYZER VIOLATIONS	APEX CODE COVERAGE	WEBHOOKS OR TOKENS	AGENTS PROVEN IN A FRESH ORG

Code Analyzer with the AppExchange and Recommended:Security rules (`docs/security-review/CodeAnalyzerReport.html`). Installed cleanly in a customer-like org with no namespace. All data stays in Salesforce, and the AI runs through the Einstein Trust Layer.

Free guided setup: we install the agents with you.

Ask through the AgentExchange listing. We set up the package, your rules and the three agents in your org.

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