

Agent Advantage™ for Salesforce

Elevate application experiences with
Application Intake Agent

BUSINESS CHALLENGE

Government program applications are often difficult for citizens and organizations to navigate. Applicants struggle to find the right information on agency websites, face complex forms with unclear requirements, and must submit extensive details – leading to frustration, errors and abandoned applications. Manual processes create bottlenecks for agencies as well, requiring staff to review incomplete or incorrectly filled submissions, delaying approvals and increasing administrative burdens. The lack of real time guidance results in back-and-forth queries, straining resources and slowing down the approvals. These inefficiencies can undermine the program accessibility, disproportionately affecting communities, while increasing compliance risks and operational costs for agencies.

AGENTIC SOLUTION

The application intake agent transforms the application filling process into a seamless experience by guiding users step-by-step through submission requirements. As a 24/7 virtual assistant, it helps applicants navigate complex forms by providing natural language explanations, auto filling fields using document scanning and validating entries in real time to prevent errors. For those unsure where to start, the AI agent offers personalized checklists and answers questions about eligibility or required documents. It proactively flags missing documents or details before submission, maintaining policy compliance, ensuring applications meet all criteria.

VALUE PROPOSITION

Effortless application completion for reduced drop-off rates

Guided user experience through complex forms with intuitive, conversational support reduces ambiguity, helping applicants confidently complete applications.

Improved submission quality and accuracy

Real time input validation and auto filled fields from uploaded documents facilitate accurate applications, reducing error, rework, delays and enables faster submissions.

Increased access and equity

Plain language explanations and inclusive prompts makes the application filling process accessible to users with varying literacy and digital comfort levels.

Reduced processing time and administrative burden

Improved submission completeness and accuracy dramatically cuts down on manual follow ups and backlogs – freeing staff to focus on higher value activities.

AGENT CAPABILITIES



Interactive guidance with conversational UI

AI agent provides dynamic conversational prompts to guide applicants through each section of the form based on real time user input and required submission input logic.



Pre-screening for basic eligibility

AI Agent engages user in a short series of policy-based questions to help determine if they meet the minimum eligibility criteria before initiating the full application process.



Intelligent document scanning and auto-fill

AI Agent uses OCR to extract relevant data from uploaded documents and populates the form fields with validated information.



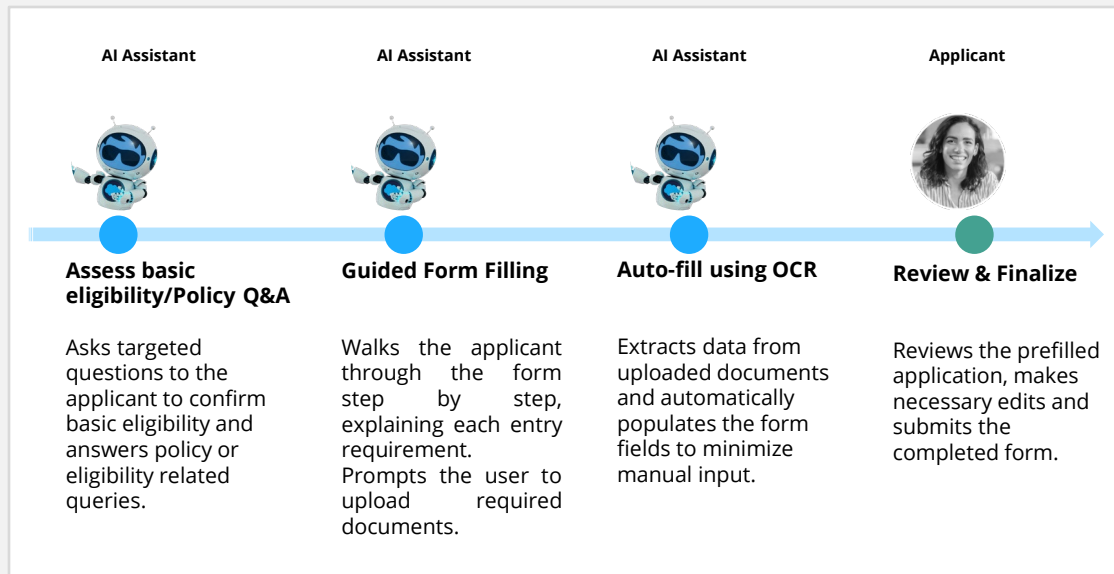
Real time field validation and error detection

AI agent verifies the entered details highlighting missing, incorrect or non-compliant entries instantly to help reduce errors at the point of entry.



Real time policy Q&A support

AI agent answers applicant questions about program rules, eligibility criteria.



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