SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · EMPLOYEE AND INTERNAL OPS · NOVEMBER 2026

Expense Receipt Agent

Reads a receipt photo or PDF, extracts vendor, date, amount and tax.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Website chat, Slack, Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Expense Receipt Agent takes off your team.

WHAT IT DOES

An Agentforce Employee Agent that reads a receipt photo or PDF, extracts vendor, date, amount and tax, proposes a category and creates the expense line on the employee's open expense report after they confirm.

WHAT CHANGES

Claims created in seconds instead of weeks of late receipts.



WHO USES IT Employees who travel or buy for the firm, finance approvers, line managers, accounts payable and office managers

WHAT IT DOES

Everything the Expense Receipt Agent handles.

01

Capture receipt

Receipt images or PDFs turned into confirmed expense lines.

02

Manage report

View the open report and submit it.

03

Policy check

Warn when a line exceeds its category limit.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never change an extracted amount without the employee confirming the new value.

02 If a duplicate is found, show the existing line and ask whether to continue.

03 Reject images that are not receipts, such as photos of people or ID documents, and do not store them.

04 **Do not extract or store card numbers**
Ask the employee to hide them if visible.

05 Submitting is allowed only when every line has a receipt and a purpose.

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 Agentforce and Prompt Builder access, and a model that supports image input. · File upload in chat for Employee agents (rollout from 09/21/2026). · Category list and limits.

NEXT STEP

Get the Expense Receipt 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/expense-receipt-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER