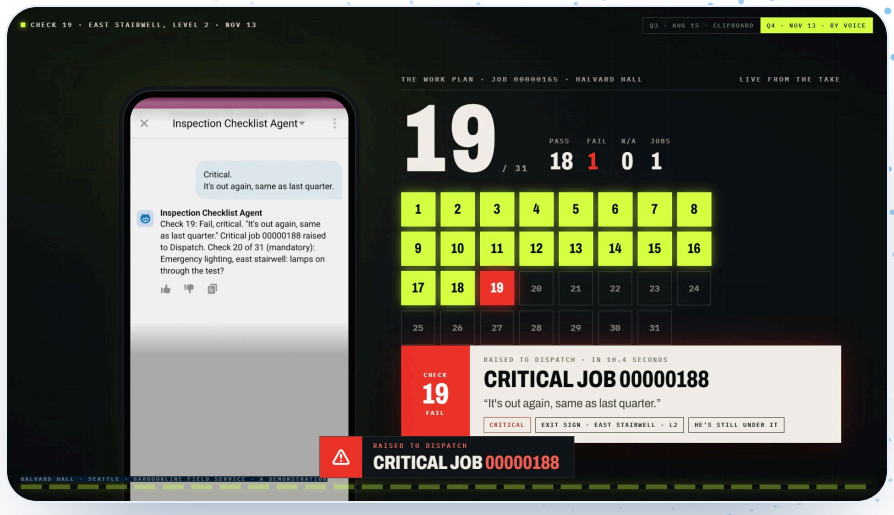
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · FIELD SERVICE AND OPERATIONS · NOVEMBER 2026

Same building. Same checks. This time, nothing got lost.

Inspection Checklist Agent. It works in the Salesforce Field Service app. The inspector walks the site and answers each check out loud; the agent records every answer on the job's work plan in his own words, raises a job for every failure while he is still standing there, and reads the summary back from the records. The site's representative signs on his phone, one approval locks it, and the office sees the whole inspection, check by check, the moment it is done.



STATUS
● LIVE DEMO

WORKS WITH
Works with your team

WHERE IT WORKS
Field Service app

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

A clipboard loses the one check that matters.

Thirty-one checks on paper, typed up at night. The note about the dark exit sign never makes it into the system, the record says every check passed, and the light stays out for weeks. Nobody lied; the note just fell between the clipboard and the screen.

- **Failures that never become jobs**
- **An evening of retyping after every inspection**
- **A record that says "pass" when it wasn't**

THE COST The inspector saw it. The system never did.

WHAT IT DOES

Everything the Inspection Checklist Agent handles.

01
The checklist, by area
The job's inspection checklist on the phone: every question in its area.

02
By voice
The Field Service app's voice to text, in the inspector's own words.

03
Check by check
Each answer on its own work step; the next check comes straight back.

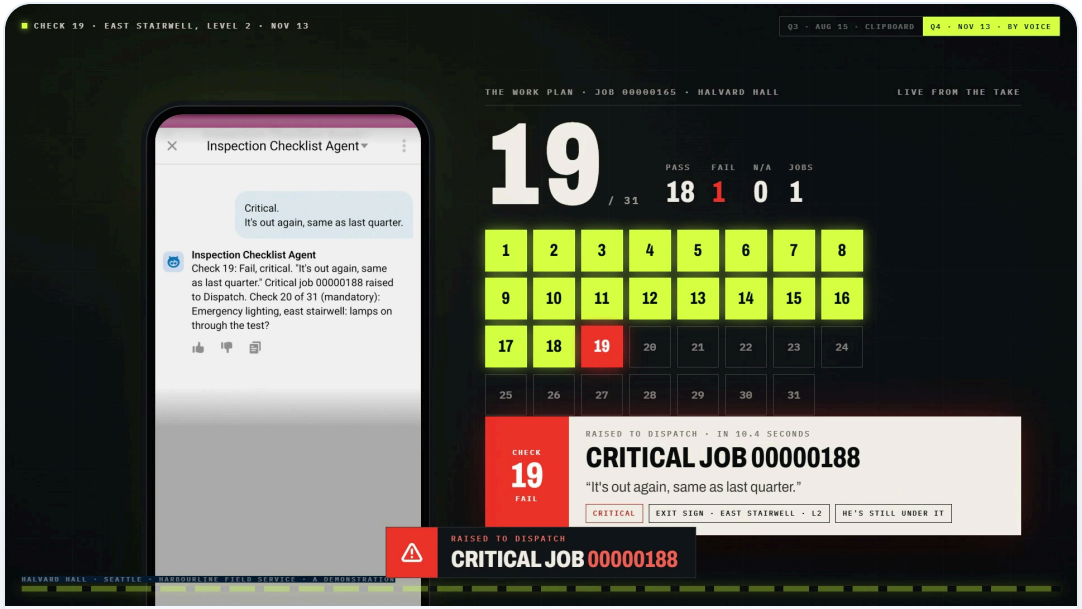
04
A failure is a job
One follow-up job per failure, raised to Dispatch in about ten seconds.

05
Signed on site
The site signs on the phone; one approval submits and locks it.

06
The office, live
Every check over the building, replayed, compared with last time.

PROOF

Recorded live on a real Salesforce org.



Watch the full run (3:55) at synconai.com/ai-agents/inspection-checklist-agent

- **By voice, check by check.** Answers in his own words, on the job's work plan.
- **A failure is a job.** Raised to Dispatch before he moves, with his words.
- **Signed on site.** The site signs on the phone; one approval locks it.
- **Nothing retyped.** The office sees every check the moment it is answered.

CHECK BY CHECK
Each answer on its own work step.

A FAILURE IS A JOB
A job before he moves.

SIGNED ON SITE
Signed by the site, approved once.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Answers from his words**
A question is never taken as an answer, and a hedge is never recorded as a pass; the agent asks again.

02 **Every failure becomes a job**
One follow-up job per failed check, linked to the inspection, with the inspector's words; Critical goes to Dispatch.

03 **Counted, not written**
The summary, the counts and every job number come from Salesforce and are said as written.

04 **Signed, then locked**
Nothing is submitted until the site signs and the inspector approves, once, on the job. After that nothing can change.

05 **Only his inspections**
It works as the signed-in inspector on the inspections assigned to him.

TESTED BY REPLAY Inspector conversations, replayed before every release: a whole 31-check walk, vague answers, questions mid-walk, a failure in two messages, corrections, not applicable checks, summaries, cancelling and approving.

THE DIFFERENCE

A digital form records what you tap. This agent walks the inspection with you.

WHEN	A CHECKLIST APP OR A CLIPBOARD	THIS AGENT
On the walk	Tap through the form, or write on paper	**Answer out loud; each answer lands on its work step**
Something fails	A note to raise a job later	**A job raised to Dispatch before he moves**
A vague answer	Recorded as whatever was tapped	**A hedge is never a pass; it asks again**
At the end	Counted by hand	**The summary counted from the records**
Sign-off	A signature on paper, scanned later	**The site signs on the phone; one approval locks it**
At the office	Typed up at night	**Every check, live, over the building**

DELIVERY

Your sites, your checks, your sign-off.

1

Map your inspections

Your inspection types, their checks and which are mandatory, and the areas of each site.

2

Configure in your org

The agent in the Field Service app, the checklist and sign-off, the Inspections tab and who receives failures.

3

Test with your inspectors' words

Real answers from your walks, replayed before go-live and before every change.

4

Go live and hand over

A pilot with one team, then everyone, 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 · Agentforce · Your checklists · Dispatch

NEXT STEP

Get the Inspection Checklist 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/inspection-checklist-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER