AGENTFORCE AGENT · EMPLOYEE AND INTERNAL OPS · NOVEMBER 2026

Internal Knowledge Concierge

Answers internal questions by searching documents in a Data Library, wiki and drive content through MCP server tools, and Slack history.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Internal Knowledge Concierge takes off your team.

WHAT IT DOES

An Agentforce Employee Agent that answers internal questions by searching documents in a Data Library, wiki and drive content through MCP server tools, and Slack history, then returns one short answer with up to three linked sources.

WHAT CHANGES

Staff finding past quotes, approaches and decisions in seconds, with a clear note when sources conflict or nothing is found.



WHO USES IT All staff, sales teams, delivery teams, new hires, support teams and team leads

WHAT IT DOES

Everything the Internal Knowledge Concierge handles.

01

Find answers

Search every active source, compose a cited answer and log it.

02

Rate and log

Record whether the answer helped and escalate unanswered questions.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Respect source permissions**
Prefer per-user authentication for the MCP server so each person only sees what they can already open.

02 **An answer needs at least 1 source**
With none, reply "I could not find this in the connected sources" and log Status No answer.

03 If sources conflict, show both with dates and say they conflict. Do not pick one.

04 Never use knowledge outside the returned extracts.

05 Do not surface customer personal data found in Slack messages.

06 **Log every question for review**
Questions rated Not helpful twice go to the knowledge owner.

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, Data 360, Slack for Salesforce and an MCP server for your wiki or drive. · The source list, the Restricted labels and a knowledge owner.

NEXT STEP

Get the Internal Knowledge Concierge 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/internal-knowledge-concierge

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

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