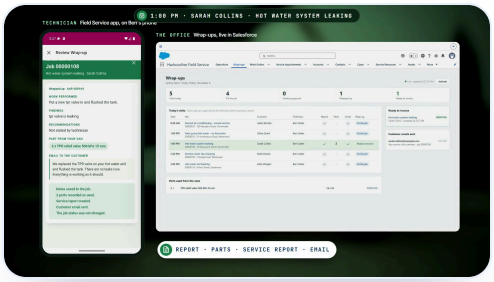
FIELD SERVICE AND OPERATIONS · AGENTFORCE EMPLOYEE AGENT

Job Wrap-up Agent

It writes down what really happened.

The Job Wrap-up Agent turns what your technician says about a job into the job report, the parts used from their van and the customer's email, inside the Salesforce Field Service app. Nothing is saved until they approve it once, and the office sees the job ready to invoice.



5	8	222	355	95%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Finds the right job
From what the technician calls it: the customer, the suburb or the kind of job, among their own open jobs.

Parts from their van
Named parts are matched to the stock on the technician's own van.

A report in their words
Work performed, findings and recommendations, written only from what they said.

Changes in plain words
Add a line or correct a quantity, and the draft is replaced.

Approve once
Review Wrap-up shows exactly what will be saved, then applies it once.

Four places updated
Job notes, parts consumed, a service report PDF and the customer email.

THE RULES IT FOLLOWS

- **Nothing saved without approval**
  Every wrap-up is a draft until the technician approves the exact text on Review Wrap-up.
- **Their access, nothing more**
  It runs as the signed-in technician: their own jobs, their own van, no prices or costs.
- **Only what they said**
  Completion wording only when the technician stated the outcome; customer text never carries prices, part codes or phone numbers.
- **Safety goes first**
  A reported hazard becomes an urgent follow-up for Dispatch at once, and a "never mind" in chat never cancels it.

PROVEN IN A LIVE RUN

Just say it. Spoken with the app's voice input, or typed, the way they'd tell a mate.

Their own jobs, their own van. Parts are matched to real van stock.

Approved once, applied once. Report, parts, service report and email together.

WORKS WITH
Works with your team

WHERE IT WORKS
Field Service app

RUNS ON
Agentforce, Salesforce Field Service, the Field Service mobile app

BEST FOR
Field technicians, service and operations managers, dispatchers, billing and invoicing teams, and service business owners

INDUSTRIES
Plumbing, electrical, heating and cooling, Appliance and equipment repair, Property and facilities maintenance, Utilities and field operations, Pest control, Pool and spa service

WHAT YOU NEED

- ✓ **Field Service**
  Technicians, vans and van stock.
- ✓ **The Field Service app**
  For your technicians, and Agentforce.
- ✓ **Your report and email wording**
  Headings, branding and the sender.
- ✓ **A Dispatch queue**
  Where safety follow-ups go.

Live. Recorded on a real Salesforce org and last validated Nov 5, 2026.

Free scoping: a 60-minute review with an architect.

We map it to your org, your rules and your data, and give you a fixed plan before work starts.

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