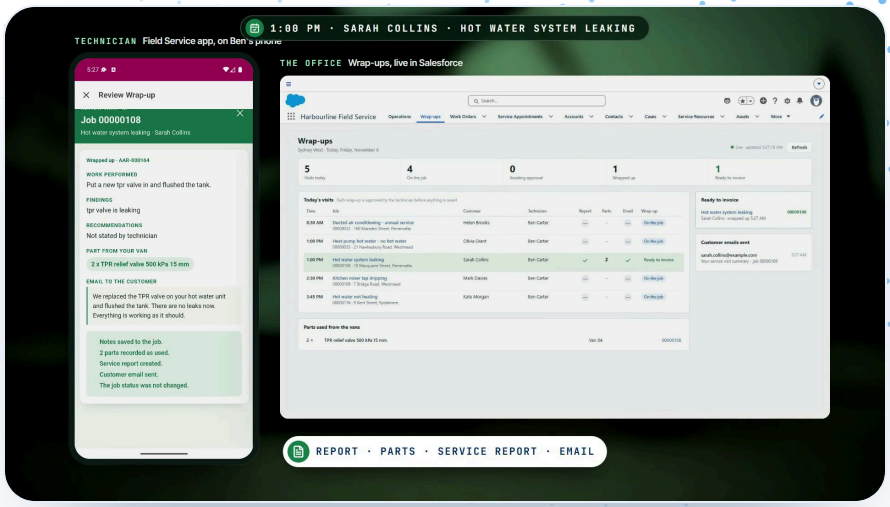
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · FIELD SERVICE AND OPERATIONS · NOVEMBER 2026

It writes down what really happened.

Job Wrap-up Agent. It 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.



STATUS
● LIVE DEMO

WORKS WITH
Works with your team

WHERE IT WORKS
Field Service app

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

The job takes an hour. The paperwork takes the evening.

The work is done by early afternoon. The report, the parts and the email to the customer wait until tonight, typed up from memory. By then the details are fuzzy, the van stock is wrong, and the office can't invoice until it arrives.

- **The report**
- **The parts he used**
- **The email to the customer**

THE COST Tomorrow the office chases it. The invoice waits a day.

WHAT IT DOES

Everything the Job Wrap-up Agent handles.

01
Finds the right job
From what the technician calls it: the customer, the suburb or the kind of job, among their own open jobs.

02
Parts from their van
Named parts are matched to the stock on the technician's own van.

03
A report in their words
Work performed, findings and recommendations, written only from what they said.

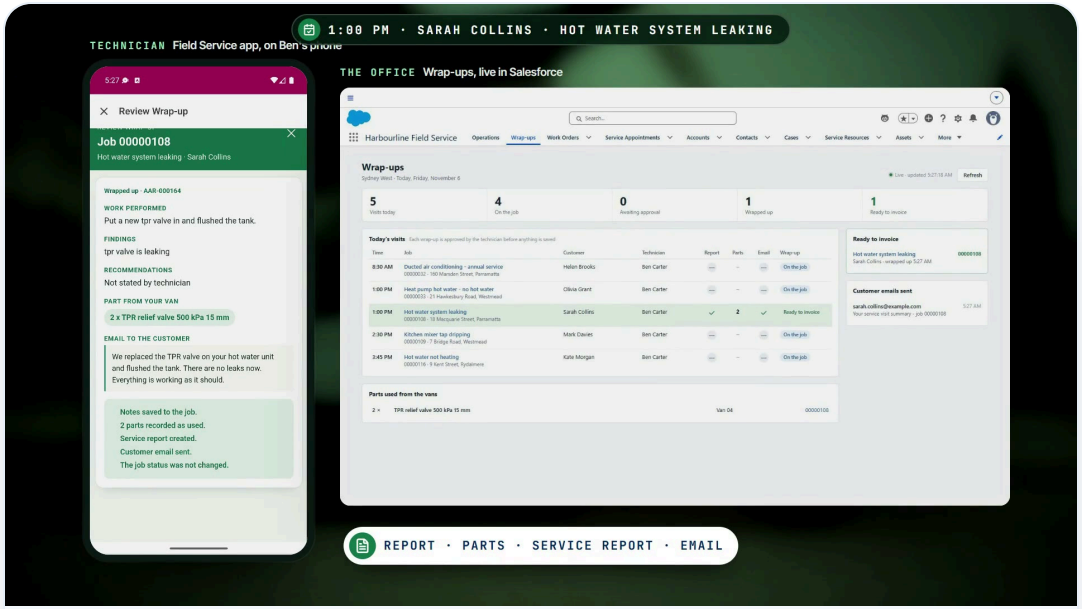
04
Changes in plain words
Add a line or correct a quantity, and the draft is replaced.

05
Approve once
Review Wrap-up shows exactly what will be saved, then applies it once.

06
Four places updated
Job notes, parts consumed, a service report PDF and the customer email.

PROOF

Recorded live on a real Salesforce org.



Watch the full run (3:17) at synconai.com/ai-agents/job-wrap-up-agent

- **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.
- **Only what they said.** "Fixed it" gets a question, never an invented report.

SARAH'S HOT WATER, SPOKEN

A draft on the right job. Nothing written yet.

A CORRECTION

One live draft, corrected in plain words.

APPROVE ONCE

One tap, four places updated.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Nothing saved without approval

Every wrap-up is a draft until the technician approves the exact text on Review Wrap-up.

02 Their access, nothing more

It runs as the signed-in technician: their own jobs, their own van, no prices or costs.

03 Only what they said

Completion wording only when the technician stated the outcome; customer text never carries prices, part codes or phone numbers.

04 Safety goes first

A reported hazard becomes an urgent follow-up for Dispatch at once, and a "never mind" in chat never cancels it.

05 The status is yours

The agent never changes the job status.

TESTED BY REPLAY Technician conversations, replayed before every release: a straight note, "Fixed it.", a correction, prices in the email, two parts in one message, an ambiguous job, a hazard and a retraction, and out-of-scope requests.

THE DIFFERENCE

A form waits for typing. This agent listens and checks.

WHEN	A TYPICAL JOB-NOTES FORM	THIS AGENT
The technician finishes	Fills fields in the van or at night	**Says it once, in plain words**
Parts used	Picked from a list, or forgotten	**Matched to their own van's stock; stock drops on approval**
"Fixed it."	Accepted as the report	**One question: what did you actually do?**
A detail changes	Edit several fields	**"Actually it was two valves": the draft is replaced**
The customer email	Written separately, or not at all	**Drafted from the technician's own words, no prices or phone numbers**
A hazard on site	A note someone reads later	**An urgent safety follow-up for Dispatch, at once**
What lands in Salesforce	Whatever was typed	**Notes, parts consumed, a service report PDF and a sent email, applied once**

DELIVERY

Your report, your vans, your wording.

1

Map your wrap-up

The headings, the parts process, the customer email and your safety procedure.

2

Configure in your org

The agent, its actions, Review Wrap-up in the app, the report branding and the office panel.

3

Test with your technicians' words

Real notes from your jobs, replayed before go-live and before every change.

4

Go live and hand over

A pilot with a few technicians, then the whole team, 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 · The Field Service app · Your report and email wording · A Dispatch queue

NEXT STEP

Get the Job Wrap-up 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/job-wrap-up-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER