AGENTFORCE AGENT · ADMIN, DATA AND PLATFORM · NOVEMBER 2026

MCP-Connected Agent

Publishes two governed Salesforce tools on a Salesforce hosted MCP server so an outside AI assistant can look up an account and create a support case, and nothing else.



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, MCP

CONTACT
contact@synconai.com

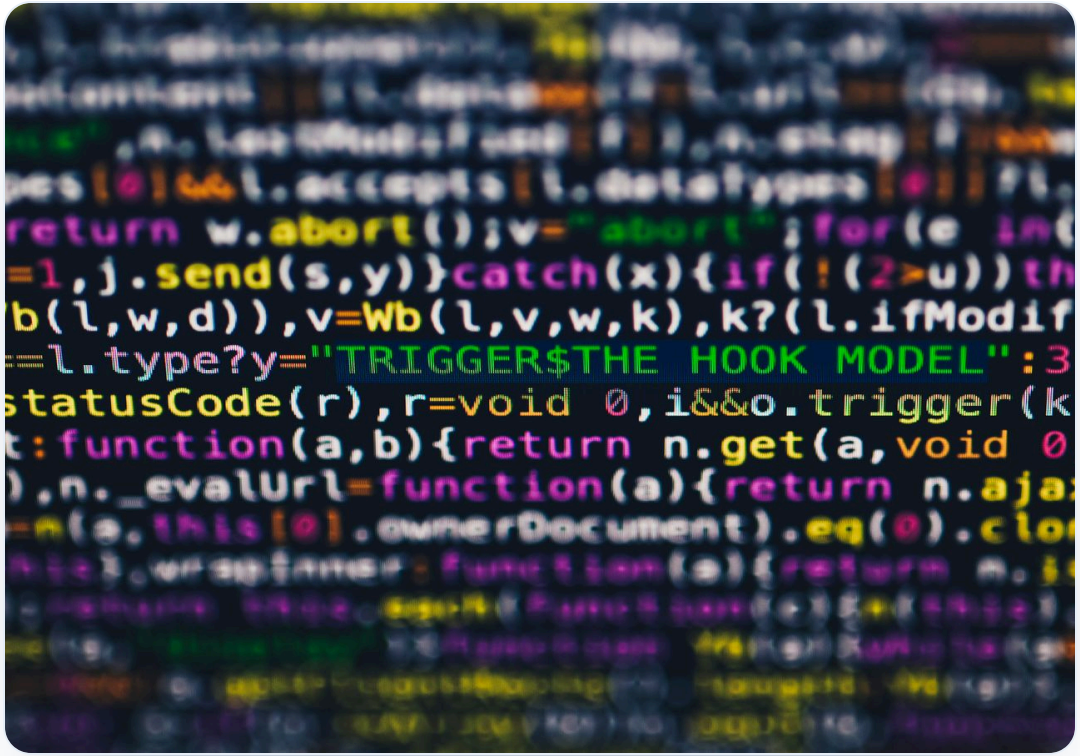
salesforce PARTNER

THE JOB IT TAKES ON

What the MCP-Connected Agent takes off your team.

WHAT IT DOES

The MCP-Connected Agent publishes two governed Salesforce tools on a Salesforce hosted MCP server so an outside AI assistant can look up an account and create a support case, and nothing else. It shows how to let an external assistant act in Salesforce without broad API access.



WHO USES IT Account managers using an external assistant such as Claude, the admin who governs the tools, sales managers, support teams and operations leads

WHAT IT DOES

Everything the MCP-Connected Agent handles.

01

Step 1

Only two tools are visible to the assistant.

02

Step 2

The integration user cannot update or delete any record.

03

Step 3

Priority, length and rate checks block bad calls.

04

Step 4

Cases carry Origin "External Assistant".

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Least privilege**
The server publishes two tools. No update, delete or open query tools.

02 **Rate limit**
Reject more than 20 write calls per caller per hour.

03 **Return only the five Account fields listed**
No revenue or contact details.

04 It may only create a Case and must refuse any other request.

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 Hosted MCP servers available in the org. · An external assistant that supports MCP. · Service Cloud for Case. · The names of allowed callers.

NEXT STEP

Get the MCP-Connected 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

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THE AGENT

synconai.com/ai-agents/mcp-connected-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER