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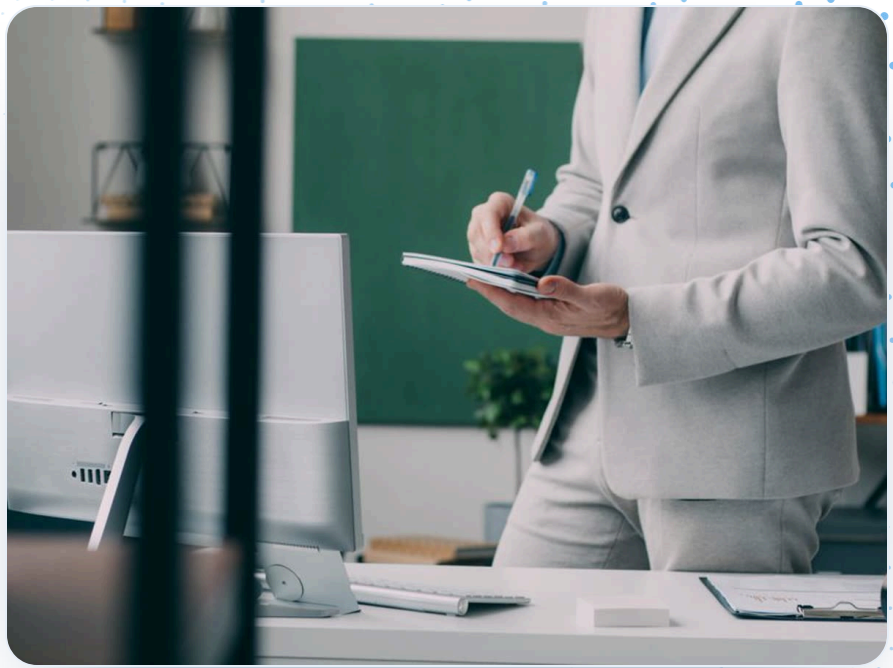
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · EMPLOYEE AND INTERNAL OPS · NOVEMBER 2026

Policy & Handbook Q&A Agent

Answers staff questions about company policy directly from the handbook and policy documents, quotes the clause it used.



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

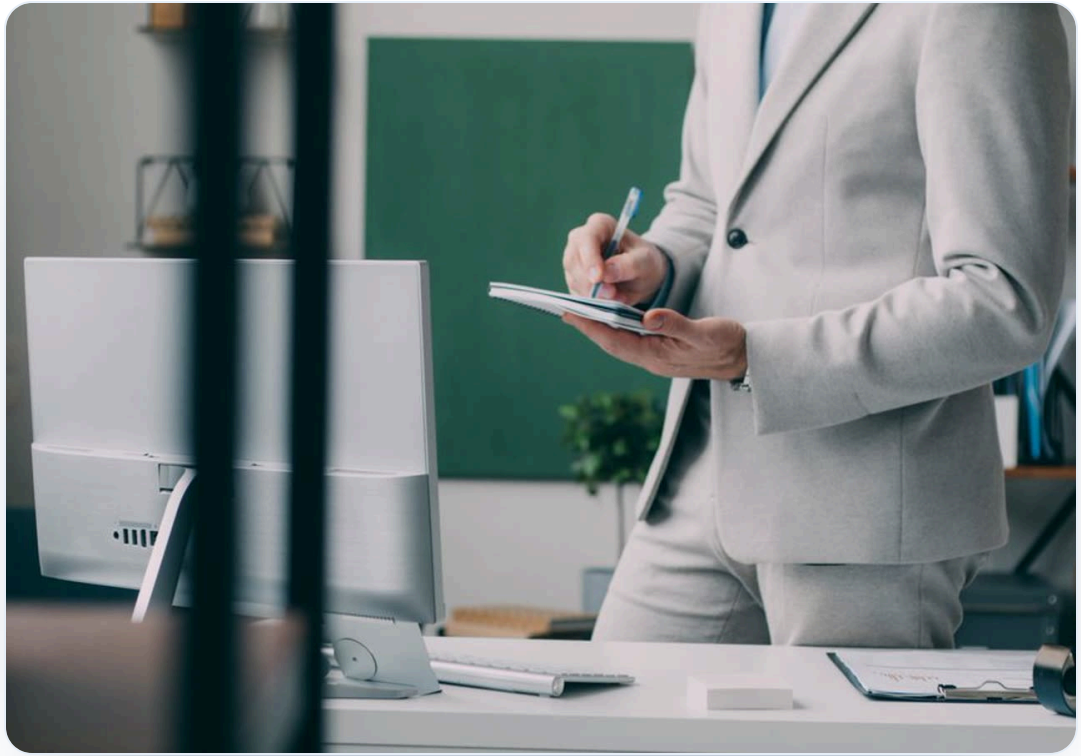
What the Policy & Handbook Q&A Agent takes off your team.

WHAT IT DOES

An Agentforce Employee Agent that answers staff questions about company policy directly from the handbook and policy documents, quotes the clause it used, and hands off to the policy owner when the documents do not cover the question.

WHAT CHANGES

Fewer repeat questions to HR and operations, with every answer traceable to a document.



WHO USES IT Employees, new hires, team leads, HR teams and office managers

WHAT IT DOES

Everything the Policy & Handbook Q&A Agent handles.

01

Policy answers

Policy questions answered from the library with a cited source.

02

Policy owner handoff

Unanswered or personal questions logged and routed to the policy owner.

03

Sensitive topics

Harassment, bullying, discrimination, whistleblowing and wellbeing. No policy summary, confidential contact given.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Answer only from the Data Library**
Never use general knowledge for policy.

02 Never give legal advice or say what an employee is legally entitled to beyond the document text.

03 **Every answer must carry a document name**
If the grounding result has no source, return the "not covered" message.

04 **Never reveal manager-only or salary information**
Keep manager-only policies in a separate library that the agent does not use.

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 and Slack for Salesforce licenses in the org. · Current policy documents and one named owner per policy area.

NEXT STEP

Get the Policy & Handbook Q&A 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/policy-and-handbook-qa-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER