SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · SALES AND REVENUE · NOVEMBER 2026

Quote Request Agent

Builds a quote from a rep's Slack request, checks the discount against policy and routes it for approval.



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 Quote Request Agent takes off your team.

WHAT IT DOES

An Agentforce Employee Agent that lets a rep request a quote in Slack. The agent finds products, builds the Quote with line items, checks the discount against a policy table and submits it for approval when the discount is above the rep's limit.

WHAT CHANGES

Quotes no longer wait on sales operations.



WHO USES IT Account executives, sales operations, inside sales teams, deal desk teams and sales managers

WHAT IT DOES

Everything the Quote Request Agent handles.

01

Product search

Matches names to price book entries.

02

Quote build

Creates the Quote and lines.

03

Discount and approval

Checks policy and submits.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Discount of 10 percent or less saves with no approval; above 10 up to 20 needs manager approval; above 20 up to 30 needs Finance approval; above 30 is blocked with a message to contact Sales Operations.

02 The agent never edits list prices or creates products.

03 Quotes are created only on opportunities the user can edit.

04 Always show total, discount and approver before submitting.

05 Quote PDF generation is out of scope; the agent returns the Quote link.

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 Quotes enabled and a maintained price book. · Your discount policy and approvers.

NEXT STEP

Get the Quote Request 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/quote-request-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER