ADMIN, DATA AND PLATFORM · AGENTFORCE EMPLOYEE AGENT

Report & Dashboard Q&A Agent

Lets leaders ask for a business number in Slack and get the answer with an as of time and the report link.

The Report & Dashboard Q&A Agent lets leaders ask for a business number in Slack and get the answer with an as of time and the report link. It answers only from a catalog of approved metrics, so the figure always matches the dashboard.



3	5	7	2	8
SUBAGENTS	ACTIONS	OBJECTS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Metric lookup
Match a question to an approved metric and return the number.

Metric explanation
Explain a metric definition.

Missing metric
Log a request when nothing matches.

THE RULES IT FOLLOWS

- Every numeric answer includes the as of time and the report link.
- **Reports run as the user so sharing rules apply**
  Return summary groupings only, never row level contact details.
- If a report has more than 25 groupings, show the top 10 and link the report.
- Every figure matches the linked report at the same time of day.

NOT INCLUDED

- Free form questions across any object.
- Creating or editing reports and dashboards.
- Charts or images in replies.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Any Cloud with reports, Agentforce, Slack integration

BEST FOR
Sales managers, service managers, executives, revenue operations and Salesforce admins

INDUSTRIES
Cross-industry · B2B sales · Customer service · Financial services · Software companies · Manufacturing · Healthcare · Nonprofits

WHAT YOU NEED

- ✓ Slack integration and Agentforce enabled.
- ✓ The metric list and owners.

Coming soon. Designed in full and built to the same standard as the live agents.

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.

salesforce PARTNER