SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · ADMIN, DATA AND PLATFORM · NOVEMBER 2026

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.



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 Report & Dashboard Q&A Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT Sales managers, service managers, executives, revenue operations and Salesforce admins

WHAT IT DOES

Everything the Report & Dashboard Q&A Agent handles.

01

Metric lookup

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

02

Metric explanation

Explain a metric definition.

03

Missing metric

Log a request when nothing matches.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Every numeric answer includes the as of time and the report link.

02 **Reports run as the user so sharing rules apply**
Return summary groupings only, never row level contact details.

03 If a report has more than 25 groupings, show the top 10 and link the report.

04 Every figure matches the linked report at the same time of day.

05 Every answer includes the as of time and report link.

06 Restricted metrics are blocked outside their audience.

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 Slack integration and Agentforce enabled. · The metric list and owners.

NEXT STEP

Get the Report & Dashboard 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

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THE AGENT

synconai.com/ai-agents/report-and-dashboard-qa-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER