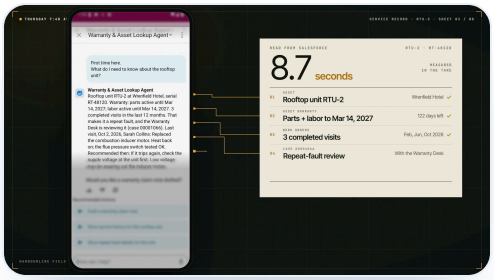
FIELD SERVICE AND OPERATIONS · AGENTFORCE EMPLOYEE AGENT

Warranty and Asset Lookup Agent

The unit's whole history, before the door opens.

The Warranty and Asset Lookup Agent works in the Salesforce Field Service app. A technician asks about the unit on today's job, by voice and in plain words, and the agent answers from Salesforce: the warranty and contract cover, every completed visit, a repeat fault and its open review, and what the last technician found. On the roof, it drafts the warranty claim note in his own words; he approves it once on the job, and it reaches your warranty desk.



5	10	306	422	93%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

By voice, in the app
The Field Service app's voice to text, in the technician's own words.

One briefing
Cover, contract, visits, repeat fault and the last notes in one answer.

A claim note from the records
The unit, cover, history and job, with the fault in his words.

No serial number
The unit comes from today's job; a serial or a description also works.

Cover, as recorded
Parts and labor with dates; "No warranty record found" when there is none.

Approved once
Saved on the job only when he approves; never twice.

THE RULES IT FOLLOWS

- **Cover exactly as recorded**
  Parts and labor said separately with their dates; with no record it says so and never assumes cover.
- **Never changes a warranty**
  The agent cannot extend, change or approve a warranty, a contract or a claim.
- **A draft until approved**
  The claim note is saved only when the technician approves it, once, on the job; the manufacturer decides the claim.
- **Repeat faults by rule**
  A review is raised automatically when a job is completed and the unit meets your repeat rule; the agent only reports it.

PROVEN IN A LIVE RUN

No serial number needed. "The rooftop unit" on today's job is enough.

Cover, exactly as recorded. Parts and labor with their end dates; never assumed, never changed.

The whole history. Every visit, the repeat fault and the last technician's notes.

WORKS WITH
Works with your team

WHERE IT WORKS
Field Service app

RUNS ON
Agentforce, Salesforce Field Service, Field Service mobile app

BEST FOR
Field technicians, warranty and service desks, service managers, dispatchers and new hires

INDUSTRIES
HVAC and building services, Commercial refrigeration, Equipment service and repair, Facilities maintenance, Medical and lab equipment service, Industrial machinery service

WHAT YOU NEED

- ✓ **Field Service**
  Work Orders and Service Appointments for your technicians, and the Field Service mobile app.
- ✓ **Agentforce**
  Agentforce for employees, in the Field Service app.
- ✓ **Your equipment**
  Assets with their warranties, and any service contracts, in Salesforce.
- ✓ **A warranty desk**
  The team that sends claims to manufacturers.

Live. Recorded on a real Salesforce org and last validated Nov 12, 2026.

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.

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