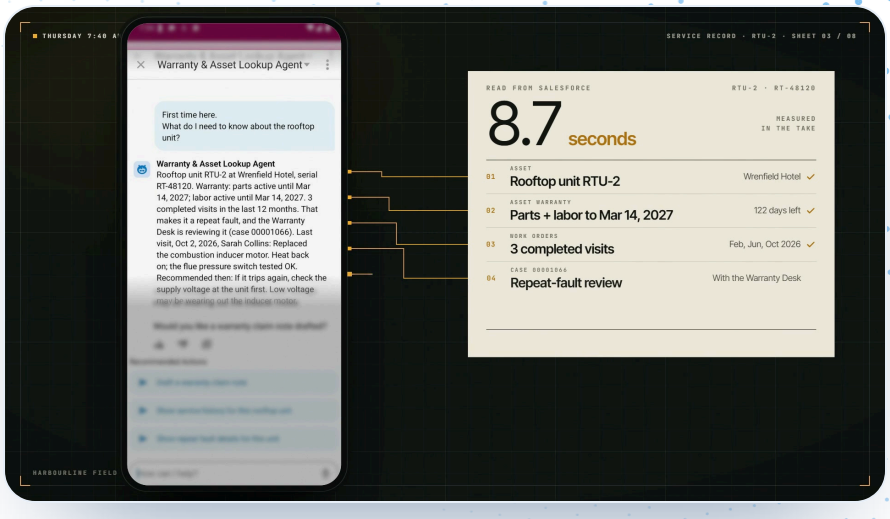
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · FIELD SERVICE AND OPERATIONS · NOVEMBER 2026

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

Warranty and Asset Lookup Agent. It 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.



STATUS
LIVE DEMO

WORKS WITH
Works with your team

WHERE IT WORKS
Field Service app

CONTACT
contact@synconai.com

salesforce PARTNER

THE PROBLEM

A new technician walks in blind.

The unit has a history: three visits, a part already replaced, a warranty that still covers it. Finding that means calling the office or clicking through records on a phone. So the fault gets fixed again, the warranty goes unclaimed and the customer pays twice.

- **The same fault, fixed the same way again**
- **A warranty claim nobody makes**
- **A call to the office for every unit**

THE COST The history is in Salesforce. It just never reaches the roof.

WHAT IT DOES

Everything the Warranty and Asset Lookup Agent handles.

01

By voice, in the app

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

02

No serial number

The unit comes from today's job; a serial or a description also works.

03

One briefing

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

04

Cover, as recorded

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

05

A claim note from the records

The unit, cover, history and job, with the fault in his words.

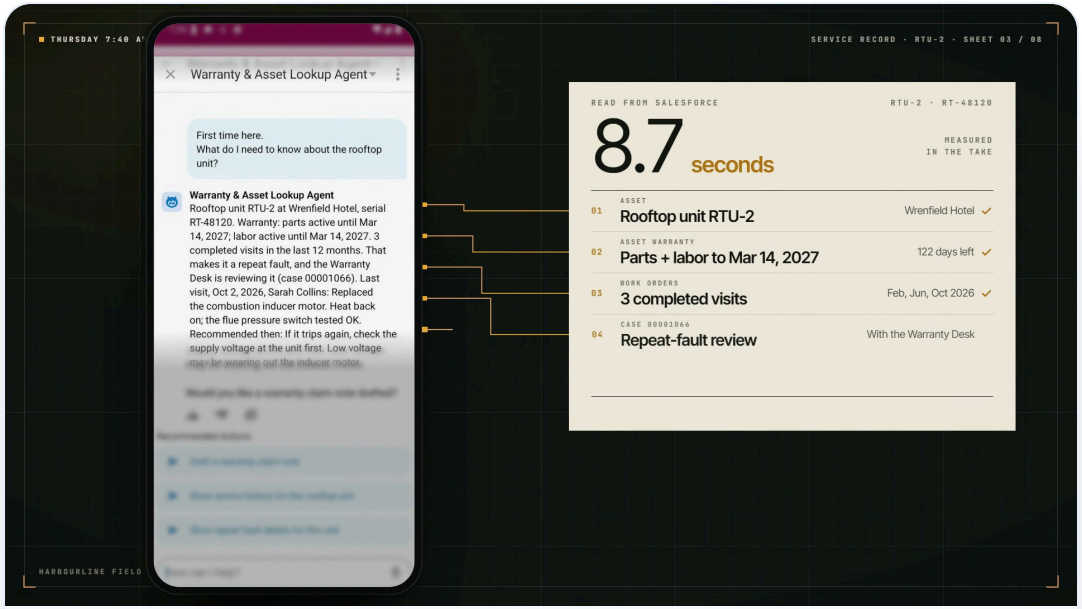
06

Approved once

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

PROOF

Recorded live on a real Salesforce org.



Watch the full run (2:57) at synconai.com/ai-agents/warranty-and-asset-lookup-agent

- **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.
- **One approval.** A claim note from the records, saved only when he approves it.

THE WHOLE HISTORY
Read from Salesforce in under nine seconds.

THE CLAIM NOTE
Built from the records, in his words.

APPROVED ONCE
One approval, on the job.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Cover exactly as recorded**

Parts and labor said separately with their dates; with no record it says so and never assumes cover.

02 **Never changes a warranty**

The agent cannot extend, change or approve a warranty, a contract or a claim.

03 **A draft until approved**

The claim note is saved only when the technician approves it, once, on the job; the manufacturer decides the claim.

04 **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.

05 **Only what he may see**

It reads as the signed-in technician, never gives repair prices and never lists another customer's equipment.

TESTED BY REPLAY Technician conversations, replayed before every release: the briefing from today's job, a description, two units that fit, attempts to extend cover or skip the review, expired and missing cover, contract-only units, a claim approved once, another customer's unit, and cancelling a draft.

THE DIFFERENCE

A search screen finds a record. This agent briefs the technician.

WHEN	LOOKING IT UP ON A PHONE	THIS AGENT
He arrives at a new site	Calls the office, or clicks through records	**One question by voice; the unit from today's job**
Is it under warranty?	A guess, or a dig through tabs	**Parts and labor with dates, exactly as recorded**
Has it failed before?	Nobody knows until it fails again	**Every visit, and the repeat-fault review already open**
What did the last technician find?	Buried in old job notes	**The last visit's notes and recommendation, read out**
The part fails again	Fixed and billed; the warranty goes unclaimed	**A claim note in his words, approved once on the job**
At the office	Notes in emails and on paper	**Every note to send on the Warranty Desk**

DELIVERY

Your units, your cover, your desk.

1

Map your equipment

Your assets, their warranties and contracts, and who runs the warranty desk.

2

Configure in your org

The agent in the Field Service app, the Warranty Desk, the unit pages and your repeat rule, in your wording.

3

Test with your technicians' words

Real questions from your jobs, replayed before go-live and before every change.

4

Go live and hand over

A pilot with one crew, then everyone, with a runbook and the test set.

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 Field Service · Agentforce · Your equipment · A warranty desk

NEXT STEP

Get the Warranty and Asset Lookup 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/warranty-and-asset-lookup-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER