



CASE STUDY & KNOWLEDGE GUIDE

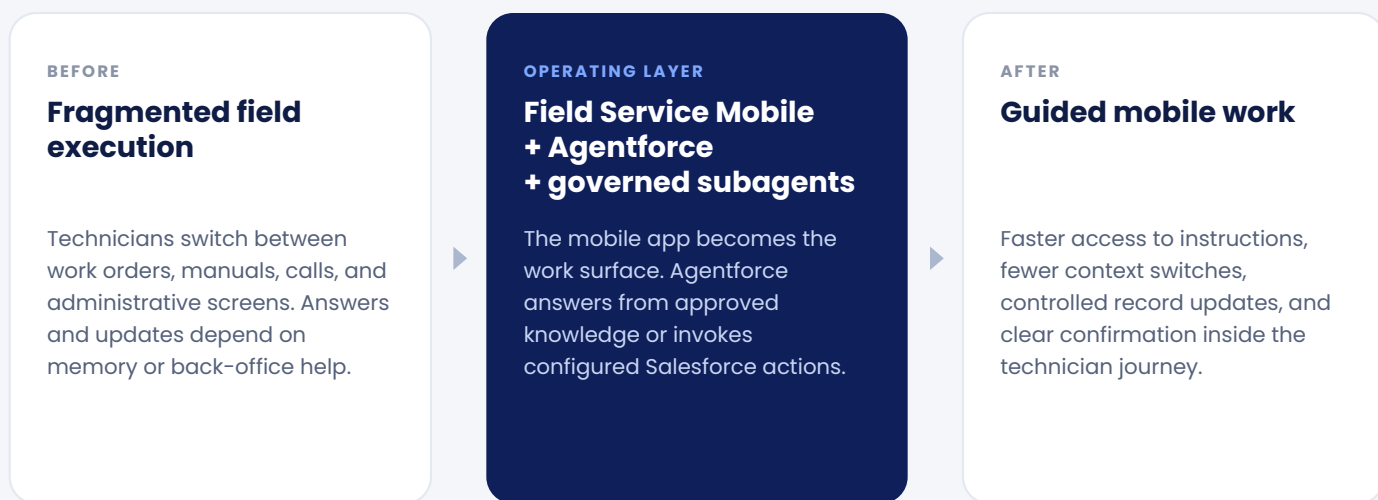
Agentforce on the Field Service Mobile App AI at the Point of Work

A governance-first guide for grounded answers, approved Salesforce actions, and controlled mobile workflows across Salesforce Field Service.

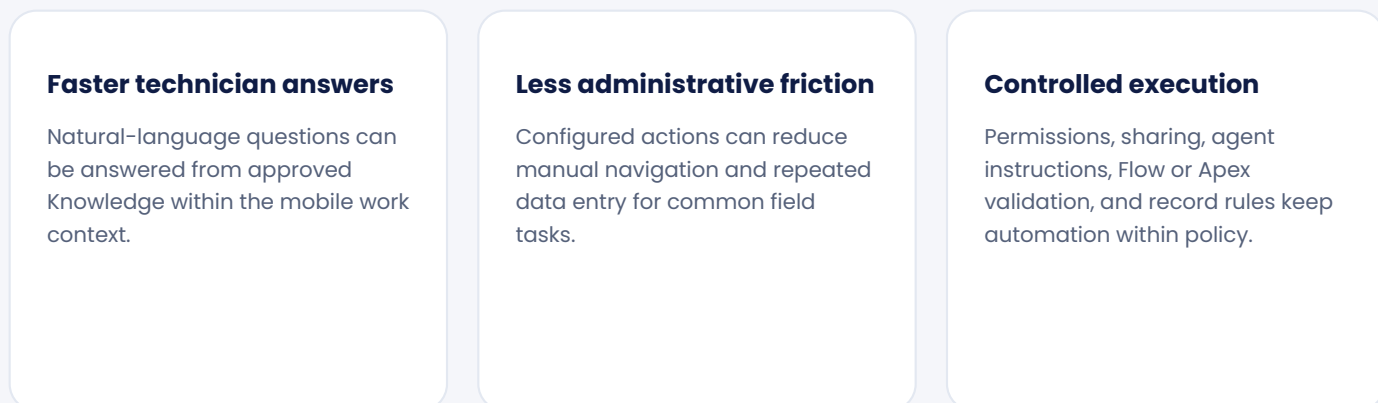
THE CXO QUESTION

AI assistance in the field – without weakening operational control.

The operating pattern places Agentforce inside the Field Service mobile experience while Salesforce remains the control plane for identity, permissions, Knowledge, approved actions, business logic, and service records.



Executive value model

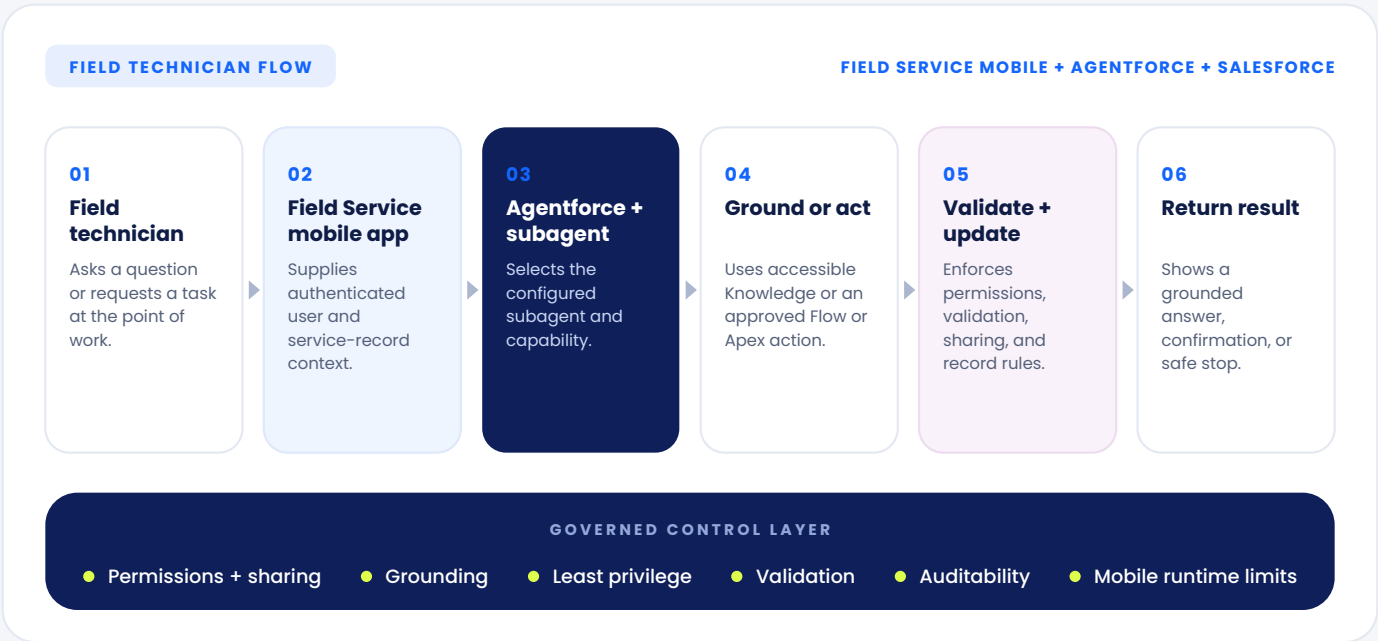


Source basis: Salesforce Help – Agentforce for Field Service Mobile Workers; Build Your Agentforce for Field Service Mobile Experience.

DEPLOYMENT MODEL

Field Service Mobile as the governed AI work surface.

A mobile worker asks in natural language. Agentforce routes the request to a configured subagent, grounds an answer in permitted Knowledge, or invokes an approved action. Salesforce validates and updates the record, then returns confirmation.



Two repeatable mobile paths

GENERAL QUESTION / FAQ

Ask › Answer Questions with Knowledge › accessible articles only › grounded response

The Knowledge action respects permissions and sharing, so the response uses only content the requesting user can access.

OPERATIONAL REQUEST

Request › subagent › approved action › Flow / Apex › validation › record update › confirmation

Custom Apex actions can be exposed through @InvocableMethod. Salesforce also documents a product-order example that uses Flow and a subagent.

References: Answer Questions with Knowledge; Create Custom Actions Using Apex Invocable Method; Example: Create a Field Service Product Order with Agentforce.

USE CASE BLUEPRINT

Three operating motions in the mobile app.

The Field Service mobile pattern can be organized into three repeatable motions: answer from trusted Knowledge, execute a configured Salesforce action, or stop and follow the approved exception path when the request is unsupported or high risk.

01
Knowledge-guided field assistance

A technician asks a procedure, troubleshooting, or FAQ question and receives a grounded response from accessible Knowledge.

1

2

3

AskGroundAnswer

BUSINESS VALUE
Faster access to repeatable guidance without leaving the mobile journey.

02
Governed field transaction

A technician requests an approved task, such as creating a product order or updating a service record through a configured action.

1

2

3

4

IdentifyValidateActConfirm

BUSINESS VALUE
Moves routine field administration from navigation to controlled task completion.

03
Controlled exception and safe stop

Ambiguous, unsupported, sensitive, or low-confidence requests do not bypass policy. The technician follows the defined human or operational path.

1

2

3

Detect limitStopEscalate

BUSINESS VALUE
Prevents fabricated answers and uncontrolled record changes.

Decision matrix for leadership review

Motion	Best-fit use cases	Primary governance question
Knowledge-guided assistance	Procedure lookup, troubleshooting, installation steps, safety guidance, service documentation	Is the answer grounded in approved sources and filtered to the technician context?
Governed transaction	Product order, case creation, appointment or work-order updates, inventory or service forms	Which permissions, validation, and confirmation are required before execution?
Controlled exception	Unsupported requests, sensitive changes, unusual service conditions, low-confidence answers	When must automation stop, and what approved escalation path applies?

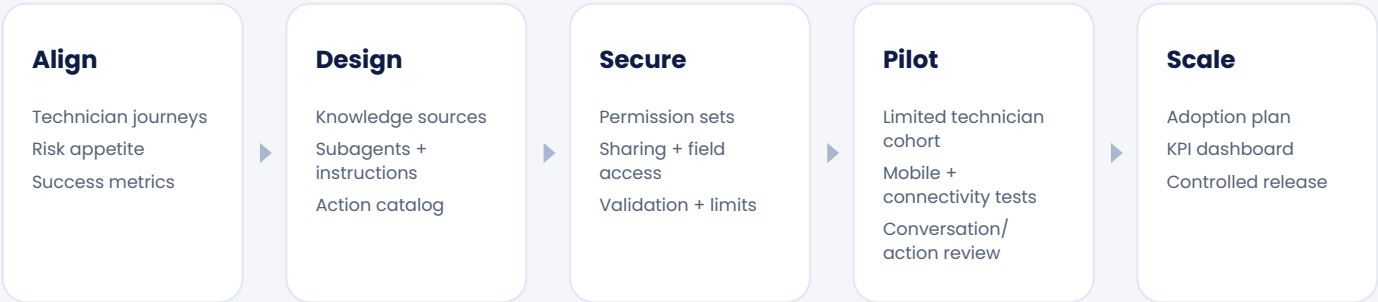
Implementation note: operational examples require configured actions, permissions, validation, and testing in the target Salesforce org.

ANTRAZAL DELIVERY LENS

From mobile demo to governed field scale.

A production rollout is not simply enabling an AI panel. It is a controlled field-service program: identify technician journeys, prepare Knowledge, design subagents and actions, verify permissions, test mobile behavior, measure outcomes, and scale after proof.

90-day implementation roadmap



Outcome	Primary KPI	Why it matters
Knowledge resolution	Qualified mobile questions answered from approved Knowledge without an external call	Measures whether Agentforce is reducing avoidable technician interruption.
Time to useful answer	Median time from technician question to accepted guidance	Shows whether field workers reach the next safe action faster.
Action reliability	Approved actions completed with valid permissions, inputs, validation, and confirmation	Confirms that operational automation remains predictable.
Data quality	Correction rate, incomplete updates, failed validations, and duplicate records	Tests whether convenience is improving - not degrading - the system of record.
Adoption and trust	Eligible technicians using Agentforce, repeat usage, feedback, and safe-stop rate	Creates the control loop required before broader production scale.

Release note: validate current licensing, availability, supported functionality, and mobile limitations in the Salesforce documentation for your release.