

Boost Productivity in Slack with Agentforce

Reduce context switching by building agentic Slack interface





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Agenda

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02 Automate in Minutes: Your First Slack Workflow

03 Beyond Triggers: Workflows in Slack!

04 No Forms. No Clicks. Just a Message.

05 From Reactive to Proactive: Agents That Don't Wait to Be Asked

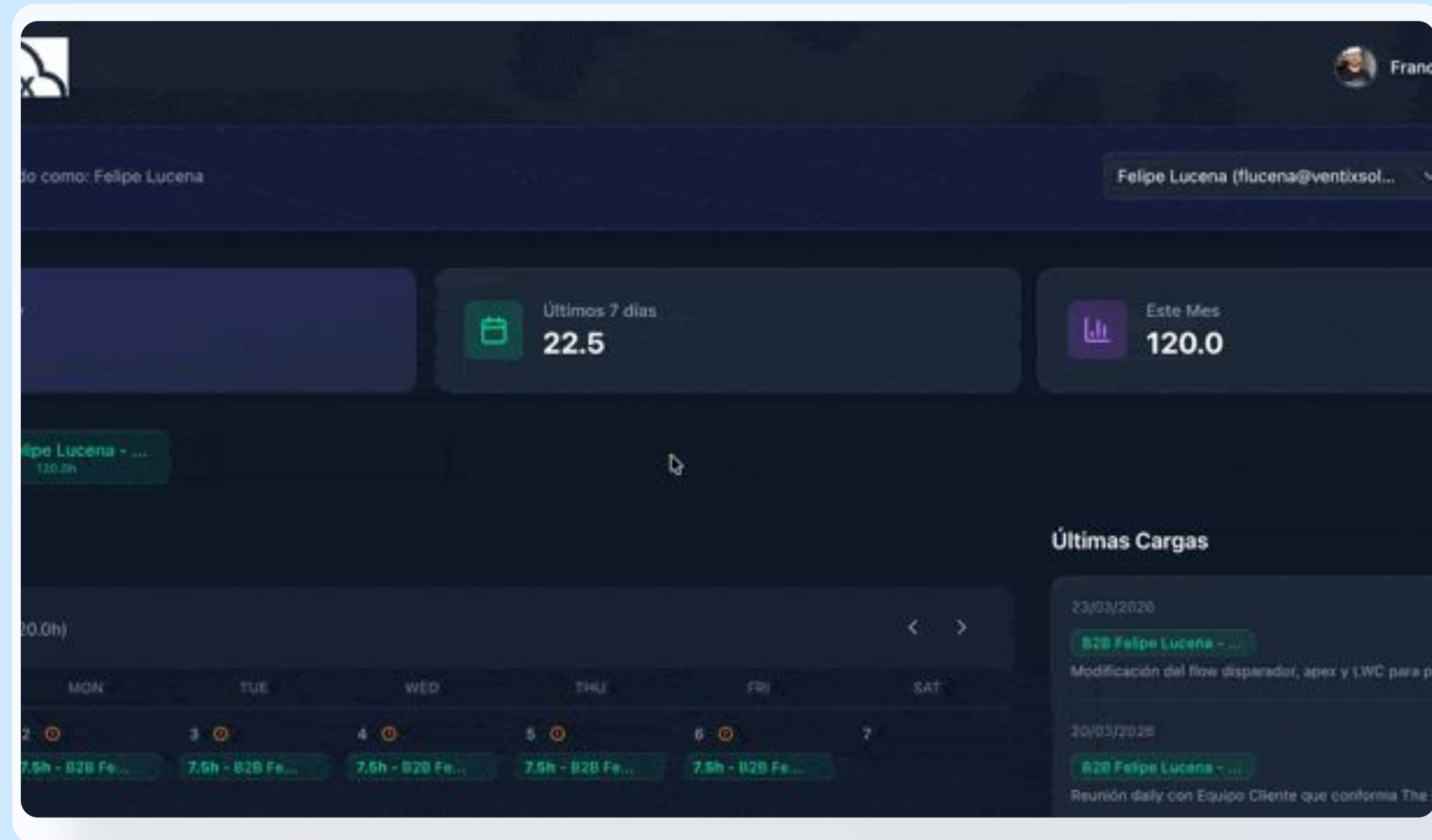
06 Things You Can Build Starting Tomorrow

The Hidden Cost of Context Switching ✨

salesforce

The problem, before we fixed it

- Developers had to leave Slack and navigate a 5-step portal just to log one hour of work
- Incomplete entries delayed client invoicing – every single week
- "Where's the link?" was the most common message in our #general channel



Automate in Minutes: Your First Slack Workflow

One simple Workflow, the beginning of the change.

In just 10 minutes we have created our first and very powerful workflow to create projects and assignments.



Beyond Triggers: Slack Workflows!



A workflow to create a project

billing-and-managment-team

Messages Add canvas Files Workflows +

Owner: 005gL000003Tp5RQAS
Hours: 78.2 / 40 Today

Create a Project

Project Name
TDX Rock!

Account
Grand Hotels & Resorts Ltd

Opportunity (optional)
Pick an option

Start Date (optional)
March 1st, 2026

End Date (optional)
May 1st, 2026

Close Submit

Create Project and Assignments

Messages Add canvas Files Workflows +

Create an Assignment

Project
TDX Rock!

End Date (optional)
March 10th, 2026

Start Date (optional)
April 10th, 2026

User (optional)
Esteban Morales

Allocated Hours (optional)
100

Capacity Max (optional)
100

Max Hours (optional)

Close Submit

Create Project and Assignments

billing-and-managment-team

Messages Add canvas Files Workflows +

Management: Assess project scope and resource allocation Today

Create Project and Assignments WORKFLOW 11:27 PM

Summary:
Project Name
TDX Rock!
Start Date
2026-03-01
End Date
2026-05-01
URL: <https://orgfarm-d9b507f5af-dev-ed.develop.my.salesforce.com/a01gL00000mnaMrQAI>
@Esteban Morales clicked Create Assignment

Project

TDX Rock!
Project · Vantegrade

Project Name
TDX Rock!

As of today at 11:27 PM

Allocated Hours
100
Billing Rate Per Hour
5
Capacity Max
100

No Forms. No Clicks. Just a Message.



What if we add Agentforce?

We have created one Agentforce that creates the time entries from one single message!

- Less clicks.
- More **productivity!**

The screenshot shows a Salesforce chat window. At the top, there is a search bar with the text "Search TH-Sd0AKLCHF4T" and a "New Thread" button. The chat header identifies the contact as "Vantegrade Agentforce" with a status "V.." and a note "This tool uses ge...".

The chat history shows a message from "Esteban Morales" (Today at 3:26 PM) with the text: "Hi can you please Submit 4 hours for Agentforce Project Working on Analysis Investigating issues Thanks!".

The response from "Vantegrade Agentforce" (Today at 3:26 PM) includes a green checkmark icon and the text: "26/3/2026 · Time logged: 4 hours · Working on Analysis, Investigating issues". Below this, it states: "This week you have logged 30 hours on this assignment (weekly guideline 40 hours; 10 hours still available). Week starting 23/3/2026." and asks: "Would you like to log more time or view your project summary?".

At the bottom of the chat, there is a heart icon with the number "1" and a smiley face icon.

Quick demo time!

Let's see how the agent works!



From Reactive to Proactive: Agents That Don't Wait to Be Asked

Autonomous agents that identify, remind, and execute important Slack tasks for your team!

- Zero prompting required
- Seamless background reasoning
- End-to-end task execution



billing-and-managment-team

Messages Add canvas Files Workflows +

2. Review assignment cap and adjust if necessary.
3. Notify project manager for compliance check. Today ▾

Action triggered by @Estepan Morales

2 replies Last reply today at 1:15 PM

Agentforce Management Assistant APP 1:36 PM
Daily Time Audit for 2026-04-02 - 2026-04-03:

Anomalies:

- Fran Morales logged 4.0 h on CPQ Project for 2026-04-03 (below daily expectation).
- Esteban Morales logged 16.0 h on Agentforce Project for 2026-04-02 (over daily expectation).
- Esteban Morales logged 16.0 h on Agentforce Project for 2026-04-03 (over daily expectation).
- Esteban Morales has logged 103.2 h on Agentforce Project (project cap: 40 h) — over the assign

Trajectory:

- Agentforce Project is HIGH BURN: 103.2 h logged vs 40 h cap (Esteban Morales).
- CPQ Project has 8.0 h logged this week (Fran Morales); project cap not set or not returned.

Actions:

1. Project managers must review overages and adjust assignments for Esteban Morales on Agent
2. Fran Morales should ensure daily hours meet expectations on CPQ Project.
3. Leadership to audit assignment caps and utilization for both projects.

Action triggered by @Estepan Morales

4 Salesforce records ▾

- User Vantegrate
- Salesforce record Vantegrate
- User Vantegrate
- Salesforce record Vantegrate

3 replies Last reply today at 1:52 PM

Create Project and Assignments

From Reactive to Proactive: Agents That Don't Wait to Be Asked



1

Trigger Agents from Event

Wake up the Agent Reasoning Engine to execute complex tasks

2

Targeted Execution

Direct Agentforce to execute predefined workflows, such as sending contextual messages directly to Slack.

3

Enrich Slack Notifications

Leverage agent insights to deliver context-rich alerts, providing your team with all the necessary details at a glance

4

In-Context Actions

Empower users to take immediate next steps and trigger follow-up tasks directly without switching apps.



Well, that's possible now!



No More Surprises: In this case we catch budget overages the moment they happen.

Stay in Your Flow: Teams get all the context they need directly in Slack without switching platforms.

Action-Oriented: The agent doesn't just inform; it drives the right next steps because it's fully grounded in your real-time CRM data

The screenshot shows a Slack channel named "# billing-and-managment-team". A message from the "Agentforce Management Assistant" app is displayed, containing a "Daily Time Audit for 2026-04-02 - 2026-04-03". The message includes sections for "Anomalies", "Trajectory", and "Actions".

Anomalies:

- Fran Morales logged 4.0 h on CPQ Project for 2026-04-03 (below daily expectation).
- Esteban Morales logged 16.0 h on Agentforce Project for 2026-04-02 (over daily expectation).
- Esteban Morales logged 16.0 h on Agentforce Project for 2026-04-03 (over daily expectation).
- Esteban Morales has logged 103.2 h on Agentforce Project (project cap: 40 h) – over the assignment limit.

Trajectory:

- Agentforce Project is HIGH BURN: 103.2 h logged vs 40 h cap (Esteban Morales).
- CPQ Project has 8.0 h logged this week (Fran Morales); project cap not set or not returned.

Actions:

- Project managers must review overages and adjust assignments for Esteban Morales on Agentforce Project.
- Fran Morales should ensure daily hours meet expectations on CPQ Project.
- Leadership to audit assignment caps and utilization for both projects.

The message also includes "4 Salesforce records" and "2 replies". A thread is visible on the right side of the screen, showing a reply from Esteban Morales asking to create a Slack channel for the CPQ Project, and a reply from the Agentforce Management Assistant asking to look up an existing channel.

Things You Can Build Starting Tomorrow



Thank
you



Session Summaries available soon.

A short recap of this session is on its way. You'll find it later today in the Salesforce Events mobile app or online on the sessions page.



Coffee on us.

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