EMPLOYEE AND INTERNAL OPS · AGENTFORCE EMPLOYEE AGENT

Expense Receipt Agent

Reads a receipt photo or PDF, extracts vendor, date, amount and tax.

An Agentforce Employee Agent that reads a receipt photo or PDF, extracts vendor, date, amount and tax, proposes a category and creates the expense line on the employee's open expense report after they confirm. Claims created in seconds instead of weeks of late receipts.



3	6	3	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Capture receipt
Receipt images or PDFs turned into confirmed expense lines.

Policy check
Warn when a line exceeds its category limit.

Manage report
View the open report and submit it.

THE RULES IT FOLLOWS

- Never change an extracted amount without the employee confirming the new value.
- If a duplicate is found, show the existing line and ask whether to continue.
- Reject images that are not receipts, such as photos of people or ID documents, and do not store them.
- **Do not extract or store card numbers**
  Ask the employee to hide them if visible.

NOT INCLUDED

- Reimbursement payment or accounting system export.
- Corporate card feeds and bank reconciliation.
- Mileage and per diem calculations.

WORKS WITH
Works with your team

WHERE IT WORKS
Website chat, Slack, Salesforce

RUNS ON
Agentforce, Salesforce Platform license, Prompt Builder

BEST FOR
Employees who travel or buy for the firm, finance approvers, line managers, accounts payable and office managers

INDUSTRIES
Cross-industry · Consulting · Field service · Sales teams on the road · Construction · Engineering firms · Agencies · Nonprofits

WHAT YOU NEED

- ✓ Agentforce and Prompt Builder access, and a model that supports image input.
- ✓ File upload in chat for Employee agents (rollout from 09/21/2026).
- ✓ Category list and limits.

Coming soon. Designed in full and built to the same standard as the live agents.

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.

salesforce PARTNER