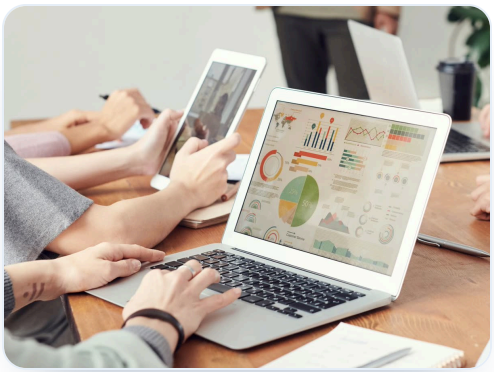
NONPROFIT AND COMMUNITY · AGENTFORCE EMPLOYEE AGENT

Impact Report Writer Agent

Pulls program outcomes, participation and gift totals from Salesforce and drafts board, funder or public impact reports.

An Agentforce Employee Agent that pulls program outcomes, participation and gift totals from Salesforce and drafts board, funder or public impact reports. Every figure comes from a retrieved record and is shown with its source.



4	3	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Step 1
Every figure matches a source row with zero mismatches in the numeric check.

Step 2
Missing measures are named and never estimated.

Step 3
No donor or beneficiary names appear; counts under 5 are suppressed.

Step 4
The agent respects the requesting user's access.

THE RULES IT FOLLOWS

- Every number in the draft must come from a retrieved row and appear in the Figures table with its source.
- A missing measure is shown as "Not recorded for this period" and never estimated.
- Use aggregates only; suppress any count under 5 people.
- No invented quotes, stories or names.

NOT INCLUDED

- Graphic design and charts.
- Publishing and sending to funders.
- Survey and qualitative analysis.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Salesforce Platform or Nonprofit Cloud, Agentforce, Prompt Builder, Slack

BEST FOR
Program managers, communications staff, development staff, executives and board members

INDUSTRIES
Nonprofit programs · Foundations · Charities · Social enterprises · Universities · Health nonprofits · Community development groups · Arts organizations

WHAT YOU NEED

- ✓ Report formats per audience and the suppression threshold.

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