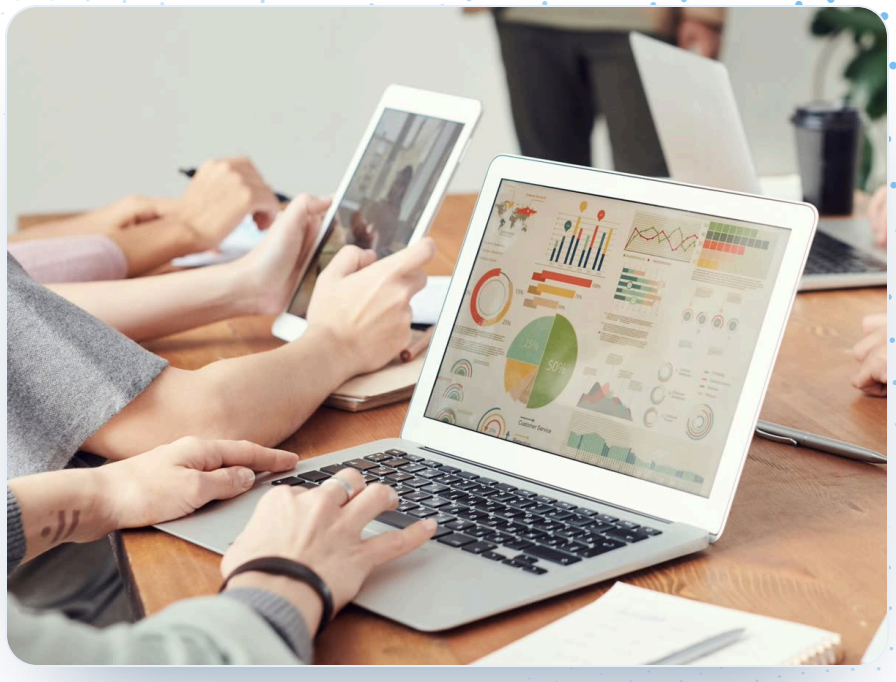
SYNCONAI
WHERE DREAMS DRIVE DATA

AGENTFORCE AGENT · NONPROFIT AND COMMUNITY · NOVEMBER 2026

Impact Report Writer Agent

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



STATUS
COMING SOON

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

CONTACT
contact@synconai.com

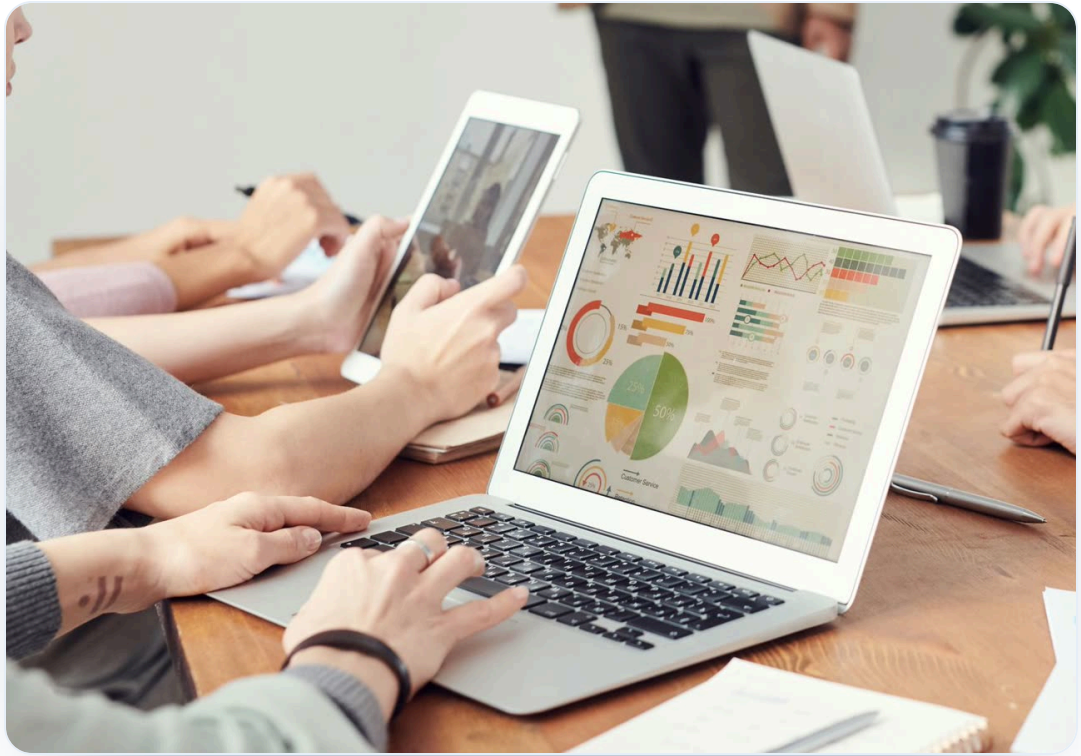
salesforce PARTNER

THE JOB IT TAKES ON

What the Impact Report Writer Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT Program managers, communications staff, development staff, executives and board members

WHAT IT DOES

Everything the Impact Report Writer Agent handles.

01

Step 1

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

02

Step 2

Missing measures are named and never estimated.

03

Step 3

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

04

Step 4

The agent respects the requesting user's access.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Every number in the draft must come from a retrieved row and appear in the Figures table with its source.

02 A missing measure is shown as "Not recorded for this period" and never estimated.

03 Use aggregates only; suppress any count under 5 people.

04 No invented quotes, stories or names.

05 Run in the requesting user's context so sharing rules apply.

06 Escalate to the Head of Programs when over 30 percent of measures for the period are missing.

TESTED BY REPLAY Scripted conversations, including the awkward ones, are replayed against the records they should create before go-live and before every change.

DELIVERY

Scoped with you, built in your org.

1

Scope with you

The actions it needs, the rules it follows and who approves what, in a fixed plan.

2

Build in your org

The agent, its Apex actions, objects and screens, as deployable Salesforce metadata.

3

Test by replay

Your own conversations replayed against your records before go-live.

4

Go live and hand over

A runbook, the test set and a walkthrough, so your team owns it from day one.

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 Report formats per audience and the suppression threshold.

NEXT STEP

Get the Impact Report Writer 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/impact-report-writer-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER