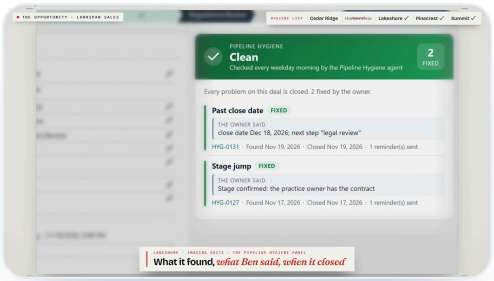
SALES AND REVENUE · AGENTFORCE EMPLOYEE AGENT

Pipeline Hygiene Agent

Your forecast, proofread every morning.

The Pipeline Hygiene Agent reads every open opportunity each weekday morning. It finds past close dates, quiet late-stage deals, missing next steps, stage jumps and amounts set to zero or changed by more than half. It tells each owner what is on their list, in Slack and in Salesforce, and the owner fixes it in one sentence in the Agentforce panel. What the owner says is what is saved; far-out dates are confirmed twice and flagged for the manager.



4	6	147	537	97%
SUBAGENTS	ACTIONS	COMPONENTS	APEX TESTS	CODE COVERAGE

WHAT IT DOES

Reads every open deal
Each weekday morning: past close dates, quiet late-stage deals, missing next steps, stage jumps of two or more steps, amounts set to zero or changed by more than half.

Tells each owner
What is on their list, in Slack and in Salesforce, at most five problems in a message and one contact per deal every three days.

A fix in one sentence
The owner says what really happened in the Agentforce panel, and exactly that is saved to the opportunity.

Far dates asked twice
A close date more than 90 days out is confirmed once more and flagged for the manager to review.

Dismiss with a reason
Duplicate, not a deal, customer paused or other, kept on the record. After two reminders and three days of silence, the manager is told.

Scores and the deal panel
Hygiene scores per owner, fixed against raised over 30 days, lowest first; and the Pipeline Hygiene panel on every opportunity.

THE RULES IT FOLLOWS

- **Never changes an amount**
  It flags an amount set to zero or changed by more than half; only the owner edits it.
- **Never closes a deal from a chat**
  For a closed stage it sends a link to the record, and the owner closes it there.
- **Writes only what the owner said**
  The close date, next step or stage the owner gave, and nothing else.
- **Polite by design**
  At most five problems in a message and one contact per deal every three days.

PROVEN IN A LIVE RUN

Every morning. Every open deal read each weekday, before the forecast call.

One sentence. The owner says the fix in their own words; that is what is saved.

Never the amount. It never changes an amount and never closes a deal from a chat.

WORKS WITH
Works with your team

WHERE IT WORKS
Slack, Salesforce

RUNS ON
Agentforce, Salesforce Sales Cloud, Slack, Lightning Experience

BEST FOR
Sales managers, revenue operations, sales operations, account executives, sales leaders who own the forecast, Salesforce admins

INDUSTRIES
B2B software and SaaS, Professional services, Manufacturing, Staffing and recruitment, Medical and dental equipment, Wholesale and distribution

WHAT YOU NEED

- ✓ **Sales Cloud**
  Opportunities with stages, close dates, next steps and owners in Salesforce.
- ✓ **Agentforce**
  Agentforce for employees, in Lightning Experience.
- ✓ **Slack (recommended)**
  Your Slack workspace connected to Salesforce, for the morning message to each owner.
- ✓ **Your thresholds**
  Your sign-off on stage names, days without activity and the far-date limit.

Live. Recorded on a real Salesforce org and last validated Nov 19, 2026.

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