EMPLOYEE AND INTERNAL OPS · AUTONOMOUS AGENT

Weekly Status Report Agent

Compiles a weekly status report for each active project from Salesforce records and posts it to Slack and email every Friday.

An autonomous Agentforce agent that compiles a weekly status report for each active project from Salesforce records and posts it to Slack and email every Friday. A consistent one page summary with a rule-based red, amber or green status, produced in minutes instead of hours.



3	6	3	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Compile project data
Gathers the week's facts for one project.

Draft status report
Writes the four section narrative from those facts only.

Publish report
Approval for Red projects and delivery to Slack and email.

THE RULES IT FOLLOWS

- **Red reports require project manager approval before posting**
  Green and Amber post automatically.
- Never include customer names from cases in a channel that has guests.
- **Post once per project per week**
  A re-run updates the draft only.
- If a project has no activity, post a one line "no change" report.

NOT INCLUDED

- Financial reporting and invoicing.
- Pulling data from Jira or other tools.
- Portfolio dashboards across projects.

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email, Salesforce

RUNS ON
Agentforce, Salesforce Platform license, Slack for Salesforce, Prompt Builder

BEST FOR
Project managers, delivery leads, executives, account managers and client-facing teams

INDUSTRIES
Professional services · Agencies · IT delivery · Consulting · Software companies · Engineering firms · Construction projects · Managed services

WHAT YOU NEED

- ✓ Agentforce, Slack for Salesforce and Platform licenses.
- ✓ RAG thresholds and the report layout they want.

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