AGENTFORCE AGENT · EMPLOYEE AND INTERNAL OPS · NOVEMBER 2026

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.



STATUS

COMING SOON

WORKS WITH

Runs in the background

WHERE IT WORKS

Slack, Email, Salesforce

CONTACT

contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Weekly Status Report Agent takes off your team.

WHAT IT DOES

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.

WHAT CHANGES

A consistent one page summary with a rule-based red, amber or green status, produced in minutes instead of hours.



WHO USES IT Project managers, delivery leads, executives, account managers and client-facing teams

WHAT IT DOES

Everything the Weekly Status Report Agent handles.

01

Compile project data

Gathers the week's facts for one project.

02

Draft status report

Writes the four section narrative from those facts only.

03

Publish report

Approval for Red projects and delivery to Slack and email.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 **Red reports require project manager approval before posting**
Green and Amber post automatically.

02 Never include customer names from cases in a channel that has guests.

03 **Post once per project per week**
A re-run updates the draft only.

04 If a project has no activity, post a one line "no change" report.

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

NEXT STEP

Get the Weekly Status Report 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/weekly-status-report-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER