Agentic Drawdown — Installation & Configuration Guide

AGENTIC DRAWDOWN | SALESFORCE AGENTFORCE | ILPA STANDARD | NOXTARA LLC

Version: 1.2.0 **Package Type:** 2GP Managed Package **Namespace:** `noxtara` **API Version:** 66.0

Prerequisites

Before installing Agentic Drawdown, ensure you have:

- [ ] Salesforce **Enterprise Edition** or higher
- [ ] **Agentforce license** assigned to users who will interact with the AI agent
- [ ] **Lightning Experience** enabled (Classic UI is not supported)
- [ ] **System Administrator** profile or equivalent permissions

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Step 1: Install the Managed Package

1. Navigate to the Agentic Drawdown listing on Salesforce AgentExchange
2. Click **"Get It Now"**
3. Select your target org and log in
4. Choose **"Install for All Users"** (recommended) or "Install for Admins Only"
5. Click **Install**

Verify installation: - Navigate to: **Setup → Installed Packages** - Confirm the `Agentic Drawdown` package with namespace `noxtara` appears - All custom objects will be prefixed: `noxtara__Fund__c`, `noxtara__Capital_Call__c`, etc.

Step 2: Assign Permission Sets

The package includes two permission sets. Assign them based on user role:

Agentic_Drawdown_User

Assign to: Fund managers, operations staff, investor relations

Object	Create	Read	Edit	Delete	ViewAll
Fund__c	❌	✅	❌	❌	✅
LP_Commitment__c	❌	✅	❌	❌	✅
Capital_Call__c	✅	✅	✅	❌	✅
Call_Transaction_Line__c	❌	✅	❌	❌	✅
Capital_Call_Target__c	✅	✅	✅	❌	✅

Object	Create	Read	Edit	Delete	ViewAll
Capital_Call_Excuse__c	✅	✅	✅	❌	✅
Drawdown_Log__c	✅	✅	❌	❌	❌

Agentic_Drawdown_Admin

Assign to: System administrators who configure funds and LP data

Grants full CRUD + Delete + ModifyAll on ALL custom objects (Fund, LP Commitment, Capital Call, Transaction Lines, Targets, Excuses, Logs). This is the only permission set that allows creating/editing Fund and LP Commitment records.

To assign: 1. Navigate to: **Setup** → **Permission Sets** 2. Click the permission set name 3. Click **Manage Assignments** → **Add Assignment** 4. Select users and save

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Step 3: Configure Global Branding (CMDT)

The Drawdown Global Setting stores org-wide defaults for notices and emails.

1. Navigate to: **Setup** → **Custom Metadata Types**
2. Click **"Manage Records"** next to `Drawdown Global Setting`
3. Click **Edit** on the "Default" record

Critical: Edit the V2 fields only. V1 fields are locked by the managed package (DeveloperControlled). V2 fields are subscriber-editable (SubscriberControlled).

V2 Field	Purpose	Example Value
`Firm_Name_V2__c`	Your firm's name on notices	"Apex Capital Partners LLC"
`Global_Signatory_Name_V2__c`	Default signatory on letters	"Jane Smith"
`Global_Signatory_Title_V2__c`	Default signatory title	"Chief Financial Officer"
`Support_Email_Address_V2__c`	Reply-to and support email	"ir@apexcapital.com"
`Support_Phone_Number_V2__c`	Support phone number	"+1 (555) 123-4567"
`Default_LPA_Citation_V2__c`	Default LPA section reference	"Section 3.1 (Capital Contributions)"
`Email_Footer_Disclaimer_V2__c`	Email footer disclaimer text	"CONFIDENTIAL: This communication..."

> **How V1/V2 resolution works:** Apex code uses `resolveV2()` — if V2 is non-blank, V2 is used; otherwise V1 (the factory default) is used as fallback.

Step 4: Configure Org-Wide Email Address

The `SendNoticesBatch` uses Org-Wide Email Addresses (OWEA) for SMTP deliverability.

1. Navigate to: **Setup** → **Organization-Wide Email Addresses**
2. Click **Add** and enter the support email (must match `Support_Email_Address_V2__c`)

3. **Verify** the email by clicking the link sent to that address
4. Ensure your email domain has **SPF** and **DKIM** records configured for deliverability

> **OWEA Display Name:** If you set a display name on the OWEA, the system will NOT call `setSenderDisplayName` on outgoing emails — this prevents the `DUPLICATE_SENDER_DISPLAY_NAME` platform error.

Step 5: Activate the Agentforce Topic

1. Navigate to: **Setup** → **Agents**
2. Select your **Employee Agent**
3. Go to the **Subagent** tab
4. Find **"Agentic Drawdown"** and **add** it
5. Verify that all 5 actions appear under the subagent:
6. Extract Funding Request
7. Calculate ILPA Allocations
8. Submit Capital Call For Approval
9. Process Capital Call Approval
10. Draft Capital Call Notices

Step 6: Create Fund Records

Navigate to the **Funds** tab and create a new Fund record.

Required Fields

Field	Type	Description
`Name`	Text	Fund name (e.g., "Apex Ventures Fund IV")
`Target_Size__c`	Currency	Fund target size — used as pro-rata denominator
`Base_Currency__c`	Picklist	Currency code (e.g., "USD")
`Status__c`	Picklist	Fund status (e.g., "Active")

> **Important:** `Designated_Approver__c` (User Lookup) is not required at the field level, but is **functionally required** for the approval workflow. Capital calls cannot be approved or rejected without a designated approver on the Fund. Set this before creating capital calls.

Recommended Fields

Field	Type	Description
`Designated_Approver__c`	User Lookup	The only user who can approve/reject capital calls for this fund
`Vintage_Year__c`	Text	Fund vintage year

Field	Type	Description
`GP_Commitment_Amount__c`	Currency	GP co-investment amount
`Mgmt_Fee_Rate__c`	Percent	Management fee rate
`Mgmt_Fee_Calculation_Basis__c`	Picklist	Fee calculation basis (e.g., "Committed Capital")
`Mgmt_Fee_Commitment_Type__c`	Picklist	Inside or Outside Commitment for management fees
`Max_Call_Percentage_Threshold__c`	Percent	Maximum call percentage guardrail

Wire Instructions (for ILPA notices)

Field	Type	Description
`Bank_Name__c`	Text	Receiving bank name
`ABA_Routing_Number__c`	Text	ABA routing number
`Account_Number__c`	Text	Account number
`Bank_Address__c`	Text Area	Bank address
`Bank_Contact__c`	Text	Bank contact name/phone
`SWIFT_BIC_Code__c`	Text	SWIFT/BIC code for international wires

Subscription Credit Facility (optional — ILPA-required when calling Sub. Facility Fees)

Field	Type	Description
`Subscription_Facility_Size__c`	Currency	Facility size
`Subscription_Facility_Lender__c`	Text	Lender name
`Subscription_Facility_Maturity__c`	Date	Maturity date
`Subscription_Facility_Outstanding__c`	Currency	Outstanding balance
`Subscription_Facility_Drawdown_Limit__c`	Currency	Drawdown limit
`Subscription_Facility_Use_of_Proceeds__c`	Long Text Area	Use of proceeds

Fund-Level Branding Overrides (optional — override CMDT defaults per fund)

Field	Type	Description
`Override_Signatory_Name__c`	Text	Overrides Global Signatory Name for this fund
`Override_Signatory_Title__c`	Text	Overrides Global Signatory Title for this fund
`Override_Support_Email__c`	Email	Overrides Support Email Address for this fund
`Default_Notice_Email_Body__c`	Rich Text (Html)	Custom email body template with merge tokens

Email template merge tokens: - `{fundName}` → Fund name - `{capitalCallNumber}` → Capital Call auto-number (e.g., CC-0005) - `{lpName}` → LP entity name - `{totalCallAmount}` → LP-specific total amount (formatted with commas)

Per-Category Commitment Type Overrides (optional)

Field	Type	Description
`Partnership_Exp_Commitment_Type__c`	Picklist	Inside/Outside Commitment for partnership expenses
`Placement_Fee_Commitment_Type__c`	Picklist	Inside/Outside Commitment for placement fees
`Other_Exp_Commitment_Type__c`	Picklist	Inside/Outside Commitment for other expenses

Step 8: Create LP Commitment Records

Each LP is represented as a **Contact** record linked to a Fund via an **LP Commitment** record.

1. **Create Contact records** for each LP entity (e.g., "California Teachers Pension", "Nordic Sovereign Fund")
2. `FirstName` and `LastName` fields used for LP entity name
3. `Email` field used for notice delivery

4. **Create LP Commitment records:**

5. Navigate to the Fund record → Related Lists → LP Commitments → New

Field	Type	Required	Description
`LP_Contact__c`	Contact Lookup	✅	The LP entity
`Fund__c`	Master-Detail (Fund)	✅	The parent fund (master-detail — LP Commitment cannot exist without a Fund)
`Committed_Capital__c`	Currency	✅	LP's committed capital amount

1. **Verify formula fields auto-calculate:**
2. `Pro_Rata_Percentage__c` = `Committed_Capital__c / Fund__r.Target_Size__c` (formula — never set manually)
3. `Unfunded_Commitment__c` = `Committed_Capital__c - Funded_Capital__c` (formula)

> **Note:** `Total_Funded_Approved_Calls__c` is maintained by the `CallTransactionLineTrigger` — it automatically updates when allocation lines are created or deleted.

Step 9: Configure Debug Settings (Optional)

`Drawdown_Debug_Setting__c` is a **hierarchy custom setting** that controls logging behavior.

1. Navigate to: **Setup** → **Custom Settings**
2. Click **"Manage"** next to `Drawdown Debug Setting`
3. Create a new record (org-wide, profile, or user level)

Field	Type	Default	Description
`Enable_Detailed_AI_Logging__c`	Checkbox	`false`	When true, INFO and WARN logs persist to `Drawdown_Log__c`
`Disable_Async_Processing_For_Tests__c`	Checkbox	`false`	Test-only flag — leave `false` in production

> **Note:** ERROR logs **always persist** regardless of this setting. The Logger class uses severity-aware `System.debug` routing (ERROR → `LoggingLevel.ERROR`, WARN → `WARN`, others → `INFO`).

Step 10: Set Up the Capital Call Command Center

The Command Center LWC (`capitalCallApprovalManager`) is packaged but **not auto-placed** on a page. You must create a Lightning App Page for it.

1. Navigate to: **Setup** → **Lightning App Builder**
2. Click **New** → select **App Page**
3. Enter label: **"Capital Call Command Center"**
4. Choose a **One Region** layout → click **Finish**
5. In the component palette (left side), search for **"Capital Call Command Center"** (under Custom components)
6. **Drag** the component into the main region
7. Click **Save** → then **Activate**
8. In the activation dialog:
9. Click **Add page to app** → select your Lightning App
10. Optionally set as the **default** tab
11. Click **Save**

Verify: Open the Lightning App → confirm the dashboard loads.

Step 11: Add the Audit Timeline to the Capital Call Record Page

The Audit Timeline LWC (`capitalCallAuditTimeline`) is designed for the Capital Call record page. It must be manually added via Lightning App Builder.

> **Note:** You can configure this step at any time, but to verify it works you'll need at least one Capital Call record. You may prefer to do this after Step 13 (first capital call). Field history tracking is auto-enabled by the managed package — no additional configuration needed.

1. Navigate to any **Capital Call** record (or create one first via Step 13)
2. Click the **gear icon (⚙)** → select **Edit Page** (opens Lightning App Builder)
3. In the component palette, search for **"Capital Call Audit Timeline"** (under Custom components)
4. **Drag** the component to your preferred location on the page (recommended: below the record detail section, or in a dedicated tab)
5. Click **Save** → then **Activate**
6. Choose activation scope:
7. **Org Default** — applies to all users (recommended)

8. Or assign to specific apps/profiles

Verify: Return to any Capital Call record → confirm the Audit Timeline displays with filter tabs (All, Approvals, Field Changes, System Logs).

Step 12: Configure the Lightning App & Object Tabs

The managed package creates object tabs automatically, but they need to be added to a Lightning App for user navigation.

Create or Update a Lightning App

1. Navigate to: **Setup** → **App Manager**
2. Either:
3. **Edit an existing app** (e.g., your firm's primary app) → click ▼ → **Edit**
4. Or **New Lightning App** → name it "Agentic Drawdown"
5. Go to the **Navigation Items** step
6. **Add the following tabs** from "Available Items" to "Selected Items":

Tab	Purpose
Funds	Manage fund records — target size, approver, wire instructions
LP Commitments	View and manage LP ↔ Fund commitments
Capital Calls	List and create capital call records
Capital Call Command Center	The dashboard page created in Step 10
Drawdown Logs	System audit logs for troubleshooting

Optional tabs (less frequently accessed): | Tab | Purpose | |---|---| | Call Transaction Lines | View allocation lines (read-only for standard users) | | Capital Call Targets | View targeted LP junction records | | Capital Call Excuses | View excused LP junction records |

1. **Order** the tabs as desired (drag to reorder)
2. Click **Save**
3. Assign user profiles to this app: **Setup** → **App Manager** → ▼ → **Manage Profiles**

Verify: Open the App Launcher → select your Lightning App → confirm all tabs appear in the navigation bar.

Step 13: Run Your First Capital Call

1. Open the **Agentforce chat panel** (top-right of Lightning Experience)
2. Type a natural language request: `Create a $10,000,000 capital call for Apex Ventures Fund IV due August 15, 2026 using Granular methodology with $7,000,000 Investments, $2,000,000 Management Fees, $750,000 Partnership Expenses, and $250,000 Working Capital`
3. The agent will:
4. **Step 1:** Extract parameters and create a Draft Capital Call record
5. **Step 2:** Calculate ILPA allocations (async Queueable)
6. **Step 3:** Present allocation summary → HITL confirmation gate

7. **Step 4:** Submit for approval → HITL confirmation gate
8. **Step 5:** Await designated approver's decision (Approve/Reject)
9. **Step 6:** Draft email notices with ILPA Excel attachments (async Batch)
10. **Step 7:** Send notices to LPs (async Batch)
11. Monitor progress in the **Capital Call Command Center** tab

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Troubleshooting

Allocation stuck in "Calculating"

- Check `Allocation_Failure_Reason__c` on the Capital Call record
- The Queueable Finalizer should catch crashes and set status to "Failed"
- If still stuck: manually update `Allocation_Status__c` to "Failed" and re-run

Permission errors

- Verify permission set assignment for the affected user
- Check that V2 CMDT fields are populated (V1 fields are read-only)
- Ensure the user has the Agentforce license assigned

LP name not matched

- Check that Contact `LastName` matches the LP name used in the prompt
- System uses two-phase resolution: exact match → fuzzy match
- Targeted LP failures cause a hard abort; excused LP failures log a warning

Approval denied — "Unauthorized"

- Only `Fund__c.Designated_Approver__c` can approve or reject
- Verify the approver User lookup on the Fund record
- The `Enforce_Designated_Approver` validation rule enforces this at the platform level

No emails sent — "Failed" status

- Verify Org-Wide Email Address is verified and active
- Check email daily sending limits (Setup → Email Administration)
- Review `Drawdown_Log__c` for batch processing errors

Missing ILPA category data

- The 8 category amounts must sum to the total call amount exactly
- Carried Interest Clawback is NOT a capital call category — it's a distribution type

Inspect system logs

- Navigate to: **App Launcher** → **Drawdown Logs**
- Filter by: Capital Call record, Log Type (`AI Execution`, `Allocation`, `Notice Generation`, `Batch Processing`, `Approval Workflow`, `Validation Error`), or Severity (`ERROR`, `WARN`, `INFO`)

Agentic Drawdown by Noxtara LLC Available on Salesforce AgentExchange