Agentic Drawdown — User Guide

AGENTIC DRAWDOWN | SALESFORCE AGENTFORCE | ILPA STANDARD | NOXTARA LLC

Version: 1.2.0 **Namespace:** `noxtara`

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1. Getting Started

Who This Guide Is For

This guide is for fund operations professionals who will use Agentic Drawdown daily:

- **Fund Managers** — Create capital calls via natural language prompts
- **CFOs / Managing Partners** — Review and approve capital calls in the Command Center
- **Investor Relations** — Monitor notice delivery status
- **Fund Operations** — Manage fund data and troubleshoot issues

Prerequisites

Before using Agentic Drawdown, your administrator should have:

1. Installed the managed package and assigned your permission set (`Agentic_Drawdown_User` or `Agentic_Drawdown_Admin`)
2. Configured org-wide branding in the Custom Metadata Type
3. Set up the Org-Wide Email Address for notice delivery

4. Deployed the Agentforce topic and actions
5. Created Fund and LP Commitment records

See the **Installation & Configuration Guide** for detailed setup steps.

Navigating the App

Access Agentic Drawdown components from your Lightning App:

Tab	Purpose
Funds	View and manage fund records
LP Commitments	View LP ↔ Fund commitment records
Capital Calls	List all capital call records
Capital Call Command Center	Split-view dashboard for review and approval
Drawdown Logs	System audit logs

To interact with the AI agent, use the **Agentforce chat panel** accessible from the Agentforce icon in the Lightning Experience utility bar.

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2. Creating Capital Calls with Agentforce

The Basics

Open the Agentforce chat panel and describe your capital call in natural language. At minimum, include:

1. **Fund name** — Must match an existing Fund record
2. **Total amount** — The total capital call amount
3. **Due date** — The payment due date

Example — Simple request:

```
Create a $10,000,000 capital call for Apex Ventures Fund IV due August 15, 2026
```

The agent will: 1. Match "Apex Ventures Fund IV" to the Fund record 2. Create a Draft Capital Call record 3. Return a confirmation with the record details

Adding ILPA Category Breakdown

For Granular methodology (the default), specify individual ILPA categories. **Category amounts must sum to the total exactly.**

```
Create a $10M capital call for Apex Ventures Fund IV due August 15, 2026
with $7M Investments, $2M Management Fees, $750K Partnership Expenses,
and $250K Working Capital
```

Adding Deal Disclosure

ILPA requires 7 deal parameter fields. Include them naturally:

```
Create a $15M capital call for Apex Ventures Fund IV due September 1, 2026
with $12M Investments and $3M Management Fees.
Deal: TechCorp Inc., a SaaS analytics platform.
Enterprise Value: $250M. TTM EBITDA: $18.5M.
Closing: September 30, 2026. Geography: North America.
Industry: Software. Strategy: Buyout.
```

Adding Fee Transparency Details

Include management fee periods, waivers, offsets, and recallable amounts:

```
Create a $12M capital call for Apex Ventures Fund IV due August 15, 2026
with $8M Investments, $3M Management Fees for Q1-Q2 2026
with a $50,000 fee waiver, $750K Partnership Expenses including
legal fees $10,000 and audit fees $8,000, and $250K Working Capital.
$2M is recallable. Per Section 3.1 of the LPA.
```

What the Agent Extracts

The agent supports **32 parameters** total (3 required + 29 optional). See the **Prompt Engineering Guide** for the complete parameter reference and advanced examples.

Important Rules

- **Category amounts must sum to the total** — The agent will reject calls where they don't match
- **Fund name must match** — The system uses two-phase resolution (exact → fuzzy)
- **Carried Interest Clawback is NOT a capital call category** — It's a distribution type
- `dealName` **and** `dealNonDisclosureReason` **are mutually exclusive** — Use one or the other

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3. Understanding the Capital Call Lifecycle

Every capital call follows a 5-stage lifecycle:

```
Draft  →  Pending Approval  →  Approved  →  [Draft Notices]  →  Distributed
                ↓
           Rejected
```

Stage Details

Status	What Happens	Who Acts	Editable?
Draft	Record created by Agentforce. Categories, deal info, and amounts populated.	AI Agent	✅ Yes
Pending Approval	Allocation calculated (async Queueable). ILPA notice JSON generated. Designated Approver auto-stamped from Fund.	System	❌ Locked
Approved	Designated Approver reviews allocation and approves. Email drafts can now be generated.	Approver	❌ Locked
Rejected	Designated Approver rejects with reason. Record can be edited and resubmitted.	Approver	✅ Yes

Status	What Happens	Who Acts	Editable?
Distributed	All email notices successfully sent to LPs. Terminal state.	System	❌ Locked

Allocation Status (runs in parallel)

Status	Meaning
None	Allocation not yet attempted (default for new Draft records)
Calculating	Queueable job running — computing pro-rata allocations
Complete	Allocations finished — notice JSON and transaction lines created
Failed	Allocation aborted — check `Allocation_Failure_Reason__c` for details

> **Note:** If the Queueable crashes unexpectedly, the Finalizer automatically sets status to "Failed" and populates the failure reason. This prevents permanent "Calculating" lock.

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4. The Capital Call Command Center

The Command Center is the primary workspace for reviewing and approving capital calls. It uses a **split-view layout**: a master list on the left, and a detail panel on the right.

KPI Top Bar

Three metrics are displayed at the top:

Metric	Description
Total Pending	Sum of `Total_Call_Amount__c` across all Pending Approval calls
Pending Calls	Count of capital calls in Pending Approval status
Urgent (≤ 48h)	Count of pending calls with due date within 2 days

Three Tabs

Tab	Content	Data Source
Active	Pending Approval + Approved calls, sorted by due date (soonest first)	`getPendingCapitalCalls()`
Historical	Distributed + Rejected calls, sorted by last modified (newest first), capped at 100	`getHistoricalCapitalCalls()`
Failed	Draft calls where `Allocation_Status__c = 'Failed'`, sorted by last modified, capped at 50	`getFailedCapitalCalls()`

Master List (Left Pane)

The left pane shows capital call cards with: - Fund name and Capital Call number - Total amount (formatted in fund's base currency) - Due date - Status badge (color-coded) - Allocation status

Controls: - **Search** — Filter by fund name or CC number - **Sort** — Sort by due date (default) or amount - **Status filter** — Filter Active tab by All Statuses, Pending Approval, or Approved

Detail Panel (Right Pane)

When you select a capital call from the master list, the right pane loads the ILPA Approval Dashboard (`capitalCallApprovalDashboard`), which displays:

- **Section A — Fund Level Summary** — Fund name, call number, total amount, notice/due dates, methodology, category breakdown, and deal disclosure
- **Section B — LP Level Detail** — Per-LP allocation details with pro-rata percentages, category amounts, unfunded impact, and commitment reconciliation
- **Distribution Queue** — Drafted LP notice emails with attachment links (visible after notice drafting)
- **Approval Actions** — Approve/Reject buttons (visible only for the designated approver when status is Pending Approval)

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5. Reviewing ILPA Notice Data

When you select a capital call in the Command Center, the detail panel renders the ILPA notice data from the stored JSON file.

Section A — Fund-Level Summary

Displays the fund-level capital call parameters:

Field	Description
Fund Name	Name of the fund
Total Call Amount	Total capital being called
Due Date	Payment due date
Notice Date	Date notices were sent
Methodology	Granular or Gross Up
Category Breakdown	Individual ILPA category amounts
Deal Disclosure	7 ILPA deal fields (name, description, enterprise value, EBITDA, closing date, geography, industry, strategy)
Fee Transparency	Fee period, waivers, offsets, recallable amount, expense descriptions
LPA Reference	Cited LPA section

Section B — Per-LP Allocations

For each LP:

Field	Description
LP Name	LP entity name (from Contact)
Committed Capital	LP's committed amount
Pro-Rata Percentage	LP's share (`Committed_Capital / Fund Target_Size`)
Per-Category Amounts	Each ILPA category allocated to this LP
Total Amount	Sum of LP's allocated amounts
Inside/Outside Fund	Whether each category is Inside Fund or Outside Fund
Inside/Outside Commitment	Whether each category reduces unfunded balance
Unfunded Impact	Amount reducing LP's unfunded balance (0 for Outside Commitment categories)
Cumulative Funded	LP's total funded amount including this call
% of Commitment Funded	Percentage of commitment called to date (capped at 100%)
Remaining Commitment	LP's unfunded balance after this call
Excused	Whether this LP is excused from excusable categories

> **Note:** Wire instructions (bank name, ABA routing number, account number, SWIFT/BIC code, etc.) are included in the generated ILPA notice letter and Excel attachment sent to each LP — they are not displayed in the Command Center dashboard.

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6. Approving & Rejecting Capital Calls

Who Can Approve

Only the **Designated Approver** can approve or reject a capital call. This is enforced at three levels:

1. **Apex guard** — The `ProcessCapitalCallApprovalAction` checks `UserInfo.getUserId() == Designated_Approver__c`
2. **LWC controller** — The `CapitalCallCommandCenterController` performs the same check
3. **Validation Rule** — `Enforce_Designated_Approver` blocks the transition at the platform level

The Designated Approver is auto-stamped from `Fund__c.Designated_Approver__c` during the Draft → Pending Approval transition by the before-update trigger.

Approving via the Command Center

1. Navigate to the **Capital Call Command Center**
2. Select a **Pending Approval** call from the Active tab
3. Review the ILPA notice data in the detail panel:
4. Verify category amounts and totals
5. Review per-LP allocation percentages
6. Check deal disclosure fields

7. Confirm wire instructions
8. Click **Approve**
9. The status transitions to **Approved**

Approving via Agentforce

The AI agent can also process approvals when prompted by the designated approver:

```
Approve capital call CC-0005
```

The agent calls `ProcessCapitalCallApprovalAction` which performs the same authorization check.

Rejecting a Capital Call

1. Select the Pending Approval call in the Command Center
2. Click **Reject**
3. The status transitions to **Rejected**
4. The record becomes editable again — it can be modified and resubmitted

After Approval

Once approved: - The record is locked (status fields excepted) - Draft email notices can be generated - The call appears in the Distribution Queue view

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7. Drafting & Sending Notices

Step 1: Draft Notices

After a capital call is Approved, generate email drafts:

Via Agentforce:

```
Draft notices for capital call CC-0005
```

What happens: - The `DraftNoticesBatch` runs asynchronously (batch size: 50) - For each LP, it creates: - An `EmailMessage` record (Status = `'5'` = Draft) - An ILPA-compliant Excel (`.xlsx`) file attached as a `ContentVersion` - The email body is resolved from: 1. `Fund__c.Default_Notice_Email_Body__c` (fund-level override) 2. A system default template (if no fund override) - Merge tokens are replaced: `{fundName}` , `{capitalCallNumber}` , `{lpName}` , `{totalCallAmount}`

Step 2: Review Drafts (Optional)

In the Command Center, select an Approved call to see the **Distribution Queue**:

Column	Description
LP Email	LP email address (from Contact)
Subject	Email subject line (clickable link to EmailMessage record)
Attachment	ILPA Excel file download link
Status	Draft or Sent

Step 3: Send Notices

Via Agentforce:

```
Send notices for capital call CC-0005
```

What happens: - The `SendNoticesBatch` runs asynchronously (batch size: 25) - Resolves sender identity: - Looks up Org-Wide Email Address matching `Support_Email_Address_V2__c` - If found: uses `setOrgWideEmailAddressId` for authenticated SMTP delivery - If the OWEA has a display name: does NOT call `setSenderDisplayName` (prevents platform error) - Fallback: uses `setSenderDisplayName` with the resolved signatory name - Each email includes the ILPA Excel attachment - On success: `EmailMessage.Status` updates from `'5'` (Draft) to `'3'` (Sent) - After all sent: Capital Call status transitions to **Distributed** (only when `totalFailed == 0 && totalSent > 0`)

Branding Resolution Hierarchy

Signatory and support email are resolved in this order:

1. **Fund-level override** (`Override_Signatory_Name__c`, `Override_Signatory_Title__c`, `Override_Support_Email__c`) — checked first
2. **CMDT default** (`Global_Signatory_Name_V2__c`, etc.) — used as fallback
3. **CMDT V1** (factory defaults) — final fallback via `resolveV2()`

> **Important:** Changes to CMDT or Fund overrides do NOT update already-drafted emails. Delete the existing drafts and re-run `Draft Notices` to apply updated branding.

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8. Working with Excuse Rights

Excuse rights allow specific LPs to opt out of certain capital call categories based on side letter provisions (e.g., ESG restrictions, regulatory compliance).

Which Categories Are Excusable?

Category	Excusable?
Investments	✅ Yes
Working Capital	✅ Yes
Placement Agent Fees	✅ Yes
Subscription Facility Fees	✅ Yes
Subsequent Close Interest	✅ Yes
Other	✅ Yes
Management Fees	❌ No — all LPs must pay
Partnership Expenses	❌ No — all LPs must pay

How to Excuse an LP

Include the excuse in your Agentforce prompt:

```
Create a $10M capital call for Apex Ventures Fund IV due August 15, 2026
with $8M Investments and $2M Management Fees.
Excuse California Teachers Pension due to ESG restriction per side letter Section 4.2.
```

For multiple excused LPs:

```
Excuse California Teachers Pension due to ESG restriction
and excuse Nordic Sovereign Fund due to geopolitical compliance.
```

What Happens Under the Hood

1. A `Capital_Call_Excuse__c` junction record is created for each excused LP
2. The allocation engine uses **Dual-Denominator Logic**:
3. **Non-excusable categories** (Mgmt Fees, Partnership Expenses): All LPs pay → denominator = Fund Target Size
4. **Excusable categories** (Investments, etc.): Only active LPs pay → denominator = Fund Target Size − Excused Commitments
5. Excused LPs receive **$0** for excusable categories but still owe their pro-rata share of non-excusable categories
6. Excuse reasons appear in the ILPA notice JSON and the notice letter narrative

Rules & Restrictions

- Excuse rights are **incompatible with Targeted scope** — you cannot use both in the same call
- Excuse reason extraction uses fuzzy matching on LP names
- Unresolved excused LP names produce a **WARN** log but do NOT abort the call (conservative — fewer LPs excused is safe)

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9. Targeted Capital Calls

Targeted capital calls allow you to call specific LPs instead of the entire fund.

Setting the Scope

The scope is set via `Capital_Call__c.Scope__c`: - **Fund-Wide** (default) — All LPs, standard pro-rata - **Targeted** — Only specified LPs

Exact Amount Mode

Each targeted LP receives a specific amount. All amounts must sum to the total.

```
Create a $5M targeted capital call for Apex Ventures Fund IV due August 15, 2026
with LP Investor 1 receiving $3,000,000 and LP Investor 3 receiving $2,000,000.
```

A `Capital_Call_Target__c` junction record is created for each LP with `Amount_Override__c` populated.

Relative Pro-Rata Mode

No individual amounts specified — the system allocates using targeted LP commitments as the denominator.

```
Create a $5M targeted capital call for Apex Ventures Fund IV due August 15, 2026
targeting LP Investor 1 and LP Investor 3.
```

Rules & Restrictions

Rule	What Happens If Violated
All or none amounts	**Hard abort** — mixed mode (some LPs with amounts, some without) is invalid
Mutually exclusive with excuse rights	**Hard abort** — cannot target specific LPs AND excuse others
LP name must resolve	**Hard abort** — any unresolved targeted LP name prevents allocation (unlike excused LPs)

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10. Gross Up Methodology

Gross Up methodology is for GPs who **cannot itemize** individual ILPA categories.

When to Use

Use Gross Up when: - The GP tracks capital calls as a single lump sum - Category breakdown is not available at call time - The GP prefers simplified allocation

How to Request

```
Create a $10M capital call for Apex Ventures Fund IV due August 15, 2026
using Gross Up methodology.
```

How It Works

1. The entire amount is allocated as a single `Capital Call: Total Amount` line per LP
2. SCI (Subsequent Close Interest) is automatically **remapped** to `Total Amount` with `Inside_Outside_Fund__c = 'Outside'`
3. The ILPA Excel generator **expands** each LP's lump sum into per-category rows using:
4. Scaling fraction: `LP Inside Amount / Fund insideFundTotal`
5. This is **presentation-only** — actual allocation stays as a single line
6. Penny-dust remainder correction adjusts the largest category to ensure the total matches exactly
7. Outside Fund lines restore their original category name during expansion

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11. The Audit Timeline

The Audit Timeline component provides a unified audit trail on each Capital Call record page. It aggregates two data sources:

1. **Field History** (`Capital_Call__History`) — Tracks changes to key fields
2. **System Logs** (`Drawdown_Log__c`) — System events from all processing stages

Tracked Fields (Auto-enabled)

Field	Events Tracked
`Allocation_Status__c`	None → Calculating → Complete/Failed
`Allocation_Failure_Reason__c`	Populated on failure, cleared on success
`Total_Call_Amount__c`	Amount changes
`Methodology__c`	Granular ↔ Gross Up changes
`Due_Date__c`	Date changes
`Status__c`	Lifecycle transitions
`Scope__c`	Fund-Wide ↔ Targeted changes
`Designated_Approver__c`	Auto-stamped during Draft → Pending Approval

Filter Buttons

Filter	Shows
All	All events combined, sorted by date descending
Approvals	Status transitions, approval/rejection events
Field Changes	Field-level history records
System Logs	`Drawdown_Log__c` records (AI Execution, Allocation, Notice Generation, etc.)

Technical Details

- **2 SOQL queries, 0 DML** — Read-only component
- **Capped at 200 events** — Most recent events shown
- Events are sorted by date descending (newest first)
- Each event shows: timestamp, event type, field name (for changes), old → new values, and user who made the change

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12. Monitoring System Logs

The `Drawdown_Log__c` object provides append-only system audit logging.

Log Types

Log Type	Source
AI Execution	Agentforce action invocations (`ExtractFundingRequestAction`, etc.)
Allocation	`CalculateAndGenerateNoticeQueueable` processing
Notice Generation	`DraftNoticesBatch` email and Excel creation
Batch Processing	`SendNoticesBatch` email delivery

Log Type	Source
Approval Workflow	`ProcessCapitalCallApprovalAction` status transitions
Validation Error	Input validation failures

Severity Levels

Severity	Behavior
ERROR	**Always persisted** regardless of debug settings
WARN	Persisted only when `Enable_Detailed_AI_Logging__c` is true
INFO	Persisted only when `Enable_Detailed_AI_Logging__c` is true

Viewing Logs

1. Navigate to the **Drawdown Logs** tab
2. Use list view filters:
3. **Capital Call** — Filter by specific capital call record
4. **Log Type** — Filter by event category
5. **Severity** — Filter by ERROR, WARN, or INFO
6. Click a log record to see the full message and payload

Common Error Patterns

Error Message	Cause	Resolution
"Fund Target Size is zero or null"	`Target_Size__c` not set on Fund record	Set `Target_Size__c` on the Fund
"Category amounts do not sum to total"	Math error in prompt	Fix category amounts and retry
"Unauthorized: You are not the designated approver"	Wrong user attempting approval	Log in as the Designated Approver
"LP name not found" (Targeted)	Contact `LastName` doesn't match prompt text	Check Contact record naming
"Mixed mode: some targets have amounts, others don't"	Invalid targeted call configuration	Use all amounts or no amounts
"Excuse rights incompatible with Targeted scope"	Both excused and targeted LPs specified	Use one or the other

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13. Reference: ILPA Category Taxonomy

Inside/Outside Fund vs. Inside/Outside Commitment

These are **two distinct ILPA classifications** — never conflate them:

Classification	Question It Answers	Example
Inside/Outside Fund (ILPA Column L)	Does the Fund act as principal or conduit?	Management Fees = Always Inside Fund
Inside/Outside Commitment	Does this reduce the LP's unfunded balance?	Management Fees = Outside Commitment (does NOT reduce unfunded)

Category Matrix

Category	Inside/Outside Fund	Inside/Outside Commitment	Excusable	Reduces Unfunded
Investments	Inside	Inside	✅	✅ Yes
Management Fees	Inside	Outside*	❌	❌ No
Partnership Expenses	Inside	Outside*	❌	❌ No
Working Capital	Inside	Inside	✅	✅ Yes
Placement Agent Fees	Inside	Outside*	✅	❌ No
Subscription Facility Fees	Inside	Outside*	✅	❌ No
Subsequent Close Interest	Outside	Outside	✅	❌ No
Other	Inside	Configurable*	✅	Depends

*Configurable per fund via `Mgmt_Fee_Commitment_Type__c`, `Partnership_Exp_Commitment_Type__c`, `Placement_Fee_Commitment_Type__c`, `Other_Exp_Commitment_Type__c`.

Unfunded Impact

The `Unfunded_Impact_Amount__c` field on each `Call_Transaction_Line__c` record determines how much reduces the LP's unfunded balance: - **Inside Commitment categories:** `Unfunded_Impact_Amount__c = Amount__c` - **Outside Commitment categories:** `Unfunded_Impact_Amount__c = 0` - **Gross Up Total Amount (blended):** Per-LP inside-commitment portion

This field is the **single source of truth** for historical unfunded balance calculations.

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14. Reference: Capital Call Status Lifecycle

```
┌──────────┐    Submit for     ┌──────────────────┐       Approve       ┌──────────┐
│  Draft   │────Approval──────▶│ Pending Approval │────────────────────▶│ Approved │
└──────────┘                   └──────────────────┘                     └────┬─────┘
     ▲                                  │                                    │
     │                            Reject│                        Draft +     │
     │                                  ▼                        Send        │
     │                          ┌──────────┐                    Notices      │
     └────── Edit & ────────────│ Rejected │                                 │
             Resubmit           └──────────┘                                 │
                                                                             ▼
                                                                     ┌─────────────┐
                                                                     │ Distributed │
                                                                     └─────────────┘

Allocation Status (parallel track):
None → Calculating → Complete (or Failed)
```

Validation Rules Enforcing the Lifecycle

Rule	Purpose
`Enforce_Designated_Approver`	Only `Designated_Approver__c` can transition to Approved or Rejected
`Protect_Designated_Approver`	Prevents manual edits to `Designated_Approver__c` — only the trigger can set it
`Prevent_Locked_Record_Edits`	Locks Pending Approval, Approved, and Distributed records (except Status changes)

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15. Reference: Email Template Merge Tokens

When creating custom email templates in `Fund__c.Default_Notice_Email_Body__c`, use these merge tokens:

Token	Resolves To	Example Output
`{fundName}`	Fund name	"Apex Ventures Fund IV"
`{capitalCallNumber}`	Capital Call auto-number	"CC-0005"
`{lpName}`	LP entity name (Contact)	"California Teachers Pension"
`{totalCallAmount}`	LP-specific total amount (formatted)	"$2,500,000.00"

Example template:

```
Dear {lpName},

We are pleased to provide this Capital Call Notice for {fundName}
(Reference: {capitalCallNumber}).

Your total contribution amount is {totalCallAmount}.

Please remit payment by the due date specified in the attached
ILPA-compliant notice.

If you have any questions, please contact our investor relations team.

Best regards,
[Signatory Name]
[Signatory Title]
```

Note: The signatory name and title are resolved from the Fund-level override or CMDT default — they are not merge tokens.

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16. Troubleshooting

Capital Call Issues

Problem	Possible Cause	Resolution
Allocation stuck in "Calculating"	Queueable job crashed	Check `Allocation_Failure_Reason__c`. If blank, manually set `Allocation_Status__c` to "Failed"
Allocation failed: "Fund Target Size is zero"	`Target_Size__c` not set	Edit the Fund record and set `Target_Size__c`
Allocation failed: structural shortfall > $1.00	LP commitments sum to less than required amount	Verify LP commitment amounts
"Unauthorized" error on approval	Current user ≠ `Designated_Approver__c`	Log in as the designated approver from the Fund record
Categories don't match total	Math error in prompt	Verify category amounts sum exactly to the total

Notice Issues

Problem	Possible Cause	Resolution
No email drafts generated	Capital Call not yet Approved	Approve the call first, then draft notices
Emails not sent — batch failed	Org-Wide Email Address not verified	Verify the OWEA in Setup → Org-Wide Email Addresses
Emails show wrong signatory	Stale draft from before branding change	Delete existing drafts and re-run Draft Notices

Problem	Possible Cause	Resolution
`DUPLICATE_SENDER_DISPLAY_NAME` error	OWEA has a display name AND `setSenderDisplayName` was called	System auto-detects this — check OWEA display name settings
LP received no email	Contact email field blank	Populate the Contact `Email` field
Call stuck in Approved (not Distributed)	At least one email failed to send	Check `Drawdown_Log__c` for batch processing errors

LP Name Resolution

Scenario	Behavior
Exact match on Contact `LastName`	✅ Resolved immediately
Fuzzy match (partial name)	✅ Resolved with best match
No match found — **Targeted LP**	❌ **Hard abort** — allocation fails, status set to "Failed"
No match found — **Excused LP**	⚠️ **Soft warning** — proceeds with fewer LPs excused

Permission Issues

Symptom	Check
Cannot see Fund records	Verify `Agentic_Drawdown_User` permission set is assigned
Cannot create Capital Call records	Verify `Agentic_Drawdown_User` permission set (grants CC Create + Edit)
Cannot create/edit Fund records	Assign `Agentic_Drawdown_Admin` permission set (Admin only)
Agentforce doesn't show Agentic Drawdown topic	Verify Agentforce license + topic activation

Getting Help

1. **Drawdown Logs** — First stop for diagnosis. Filter by ERROR severity.
2. **Audit Timeline** — Check field change history on the Capital Call record.
3. **Setup** → **Debug Logs** — For Apex-level debugging.
4. Enable `Enable_Detailed_AI_Logging__c` in Custom Settings for verbose INFO/WARN logs.

Agentic Drawdown by Noxtara LLC Available on Salesforce AgentExchange

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