NONPROFIT AND COMMUNITY · AGENTFORCE EMPLOYEE AGENT

Donor Thank-You & Stewardship Agent

Reacts to each new gift, drafts a personal thank-you from the donor's history, flags major gifts, and schedules the follow-up.

An autonomous Agentforce agent that reacts to each new gift, drafts a personal thank-you from the donor's history, flags major gifts, and schedules the follow-up. Fundraisers approve drafts in Slack instead of writing them.



5	7	3	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Step 1
Every new gift yields a draft or a documented skip within 2 minutes.

Step 2
No email is sent before approval.

Step 3
Major gifts alert the Head of Fundraising and create a call Task.

Step 4
Anonymous and Do Not Contact settings are honored.

Step 5
Drafts are under 120 words with no unsupported claims.

THE RULES IT FOLLOWS

- No tax or deductibility advice.
- No data about other donors or beneficiaries.
- Escalate gifts of $5,000 or more, and notes mentioning a bequest, memorial or complaint, to the Head of Fundraising.
- An approved thank-you always has a follow-up Task.

NOT INCLUDED

- Printed letters and mail merges.
- Tax receipts.
- Prospect research and wealth screening.

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email, Salesforce

RUNS ON
Salesforce Platform with NPSP or Nonprofit Cloud, Agentforce, Prompt Builder, Slack

BEST FOR
Fundraisers, development directors, donor relations teams, executive directors and donors who receive the email

INDUSTRIES
Charities · Foundations · Schools · Universities · Hospitals · Museums · Faith-based organizations · Arts organizations

WHAT YOU NEED

- ✓ Tone samples, tier thresholds and the Do Not Contact policy.

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