AGENTFORCE AGENT · NONPROFIT AND COMMUNITY · NOVEMBER 2026

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.



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 Donor Thank-You & Stewardship Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT Fundraisers, development directors, donor relations teams, executive directors and donors who receive the email

WHAT IT DOES

Everything the Donor Thank-You & Stewardship Agent handles.

01

Step 1

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

02

Step 2

No email is sent before approval.

03

Step 3

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

04

Step 4

Anonymous and Do Not Contact settings are honored.

05

Step 5

Drafts are under 120 words with no unsupported claims.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 No tax or deductibility advice.

02 No data about other donors or beneficiaries.

03 Escalate gifts of $5,000 or more, and notes mentioning a bequest, memorial or complaint, to the Head of Fundraising.

04 An approved thank-you always has a follow-up Task.

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

NEXT STEP

Get the Donor Thank-You & Stewardship 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/donor-thank-you-and-stewardship-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER