NONPROFIT AND COMMUNITY · AGENTFORCE EMPLOYEE AGENT

Grant Deadline Tracker Agent

Watches grant report deadlines, alerts the owner at 30, 14 and 7 days, checks which required measures have recorded results.

An autonomous Agentforce agent that watches grant report deadlines, alerts the owner at 30, 14 and 7 days, checks which required measures have recorded results, and drafts the report for review. Grant managers stop tracking deadlines in spreadsheets.



5	6	2	8
SUBAGENTS	ACTIONS	CHANNELS	TEST CONVERSATIONS

WHAT IT DOES

Step 1
One alert per open report at each of 30, 14 and 7 days.

Step 2
Missing measures are named in alert and draft.

Step 3
The agent never sets Submitted.

Step 4
Escalation occurs at 7 days with over half missing.

Step 5
Slack questions return a correct deadline list.

THE RULES IT FOLLOWS

- Never estimate a missing value or reuse a prior year figure.
- Never mix one funder's data into another funder's report.
- Financial reports are flagged for the finance team and not drafted.
- Escalate to the Head of Programs when a report is within 7 days and more than half the measures are missing.

NOT INCLUDED

- Grant applications and prospecting.
- Submitting to funder portals.
- Financial reconciliation.

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email

RUNS ON
Salesforce Platform (custom grant objects) or Nonprofit Cloud grantmaking, Agentforce, Prompt Builder, Slack

BEST FOR
Grants managers, program managers, development directors, finance teams and executive directors

INDUSTRIES
Grant-funded charities · Foundations · Research institutes · Universities · Health nonprofits · Arts organizations · Community development groups · Social enterprises

WHAT YOU NEED

- ✓ Funder templates and required measures per grant.

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