AGENTFORCE AGENT · NONPROFIT AND COMMUNITY · NOVEMBER 2026

Grant Deadline Tracker Agent

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



STATUS
COMING SOON

WORKS WITH
Runs in the background

WHERE IT WORKS
Slack, Email

CONTACT
contact@synconai.com

salesforce PARTNER

THE JOB IT TAKES ON

What the Grant Deadline Tracker Agent takes off your team.

WHAT IT DOES

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.



WHO USES IT Grants managers, program managers, development directors, finance teams and executive directors

WHAT IT DOES

Everything the Grant Deadline Tracker Agent handles.

01

Step 1

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

02

Step 2

Missing measures are named in alert and draft.

03

Step 3

The agent never sets Submitted.

04

Step 4

Escalation occurs at 7 days with over half missing.

05

Step 5

Slack questions return a correct deadline list.

BUILT TO BE TRUSTED

The rules it cannot talk its way around.

01 Never estimate a missing value or reuse a prior year figure.

02 Never mix one funder's data into another funder's report.

03 Financial reports are flagged for the finance team and not drafted.

04 Escalate to the Head of Programs when a report is within 7 days and more than half the measures are missing.

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 Funder templates and required measures per grant.

NEXT STEP

Get the Grant Deadline Tracker 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/grant-deadline-tracker-agent

GLOBAL DELIVERY

United States · Australia · India

BUILT BY

SynconAI, Salesforce Select Partner · 5.0/5 CSAT

salesforce PARTNER