



Agentforce Merchant Agent Custom Actions

Installation Guide for Salesforce
Admins

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About the Agentforce Merchant Agent Custom Actions Unmanaged Package

The Agentforce Merchant Agent custom actions are packaged and available for download from AppExchange. With these custom actions, you can automate certain tasks relating to managing products in your B2B or D2C store. Download the package and deploy the components to your Salesforce org. You can either use these custom actions out-of-the-box or customize them to suit your business purpose.

The package contains these topics.

TOPIC NAME	What It Does	ACTIONS
Answer B2B D2C Questions	Responds to general queries related to B2B and D2C stores.	Answer-B2B-D2C-Question
Import Products	Extracts product details from a Google spreadsheet and imports these products to the B2B or D2C store.	Create Product
Attach Promotion to Campaign	Creates promotions and attaches new promotions to a campaign.	Attach Promotion to Campaign
Find Low Selling Products	Generates a list of low-selling products in the B2B or D2C store.	Find Low Selling Products
Find Suggested Bundles	Suggests product bundles based on products that are frequently bought together. Also creates bundles in the store and assigns products to the new bundle.	Assign Products to Bundles Create Product Bundle Find Suggested Bundles
Category Management in Commerce Webstore	Creates categories with or without products and updates categories in the B2B or D2C store.	CreateOrUpdateCategory
Commerce Merchandizer Topics	Performs admin-specific tasks, such as creating products in a store, writing product descriptions, creating product bundles, and assessing the readiness of products.	Fetch Active Products not ready but already in storefront Fetch Ready to Activate Products Update Product IsActive

Product Exposure - Promo and Boost	Creates boost and bury rules for products and suggests strategies to promote the sale of certain products.	Save Boost/Bury Rules
Product SEO	Retrieves SEO scores and generates SEO meta tags and descriptions for products in the B2B or D2C store.	Generate Meta Description Generate Product Description Generate SEO Meta Title Tag for Products Get SEO Store
Update Product Price	Updates product prices in the B2B or D2C store.	Update Price for Products

See Also:

- [What are Agents?](#)

Deploy the Package from AppExchange

The Merchant Agent topics and actions are available in a package that you can download from AppExchange. After you install the unmanaged package, configure it for your environment and use.

REQUIRED LICENSES

You need these licenses to deploy the Agentforce Merchant Agent Custom Actions unmanaged package in your B2B or D2C store.

- Order Management Licenses
- Agentforce Service Agent licenses
 - CdpSegmentsActivationCard(10)
 - ChatbotEnabled(10)
 - EinsteinGPTPlatformAddOn(10)
 - EinsteinGPTPromptBuilderAddOn(10)
 - GenieDataPlatformStarter(10)
 - EinsteinGPTCommerceAddOn(10)
 - Identity(10)

1. [Set up your agent.](#)
2. Download and install the Commerce Merchant Agent Toolkit - Store and Merchandising Actions package from AppExchange for all users. See [Installing Packages](#). After the package is installed, the **Commerce Merchant Agent Toolkit - Store and Merchandising Actions** package is listed under Installed Packages under Setup. The agent actions are listed under Agentforce Assets under Setup.
3. Add the Merchant Agent topics to your existing agent.
 - a. At the top of the page, click  and select **Setup**.
 - b. In the Quick Find box, find and select **Agentforce Agents**.

- c. Click the agent you want to add the Merchant Agent topics to.
 - d. Click **Open in Builder**.
 - e. Click **New**, and then click **Add from Asset Library**.
 - f. Select the topics you want to add, and then click **Finish**.
For the list of topics in the Merchant Agent Custom Actions package, see [About the Agentforce Merchant Agent Custom Actions Unmanaged Package](#).
 - g. Use the conversation preview to test each action.
 - h. After verifying that the agent responds correctly and completes the intended actions, click **Activate**.
4. Assign the Merchant_Agent_PSG permission set group to your merchant user, so that the merchant user can further configure the agent.
 - a. At the top of the page, click  and select **Setup**.
 - b. In the Quick Find box, find and select **Permission Set Groups**
 - c. Click the Merchant_Agent_PSG permission set group.
 - d. Click **Manage Assignments**.
 - e. Select the merchant from the list, and then click **Next**.
If your merchant isn't on the list, make sure that they've been assigned the AgentforceServiceAgentUserPsg permission set group. See [Assign Permission Set Groups to Users](#).
 - f. Click **Assign**.
5. To use the AttachPromotionToCampaign action, include the **Promotion** field under Related on the campaign page, edit the page layout.
 - a. At the top of the page, click  and select **Setup**.
 - b. Select **Object Manager**, and in the Quick Find box, find and select **Campaign**.
 - c. Click **Page Layouts**, and then click **Campaign Layout**.
 - d. Add **Promotions** under **Related Lists**, and save your changes.
6. To use the Create Product action, integrate your Google instance with your Salesforce org.
 - a. Create a Google Cloud Project. See [Create a Google Cloud project](#).
 - b. Enable Google Sheet API and Google Drive API. See [Enable Google Workspace APIs](#).
 - c. Create the OAuth Credential and OAuth Client ID. See [Setting up OAuth 2.0](#).
 - d. In Setup, search for and select **Auth. Providers**.
 - e. Click the **Edit** button next to GoogleSheet.
 - f. Update the consumer key and the consumer secret, and save your changes.
 - g. In Setup, search for and select **Named Credential**.
 - h. Edit the GoogleSheetAPI named credential, and save the credential without making any changes.
 - i. Create a Google Sheets file with the name productData and with columns labeled Product Name, Product Description, SKU, Category, Price (sale) USD, and Price (original) USD.
Specify this Google Sheet when you use the Create Product action to import product data into your Salesforce org.
7. To use the B2B_D2C_Questions action, [create a search retriever](#) that filters the Commerce Cloud Release Notes. After you create the search retriever, complete these steps.
 - a. At the top of the page, click  and select **Setup**.
 - b. In Setup, search for and select **Prompt Builder**.
 - c. Select the AnswerB2B D2C Question prompt template.

- d. Replace INSERT_RETRIEVER_NAME_HERE with the name of the retriever you created, and save the prompt as a new version.
- e. Activate the prompt template.

See Also:

- [Installing Packages from App Exchange](#)
- [Google: Create a Google Cloud project](#)
- [Google: Enable Google Workspace APIs](#)
- [Google: Setting up OAuth 2.0](#)

Custom Action: Answer-B2B-D2C-Question

Use this action to make decisions and generate conversational responses to questions about your B2B or D2C store.

Action Detail

API Name	Answer_B2B_D2C_Question
Action Type	Custom
Reference Action Type	Prompt Template
Inputs (as part of a prompt)	chunks query Citation Mode
Outputs	Prompt Response Citations
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising Agentforce for Guided Shopping for B2B and D2C Commerce

Examples of Utterances That Trigger This Action

- “How can I improve my B2B sales strategy?”
- “Help me understand the differences between B2B and D2C models.”
- “I need help with setting up a B2B e-commerce platform.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Assign Products to Bundles

Use this action to assign a group of products to a product bundle.

Action Detail

API Name	Assign_Products_to_Bundles
Action Type	Custom
Reference Action Type	Flow

Inputs (as part of a prompt)	productBundleId productRecords
Outputs	updatedBundleRecord
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Assign these products to the XYZ bundle.”
- “Add product IDs [123, 456, 789] to the ABC bundle.”
- “Can you include these items in the XYZ product bundle?”

See Also:

- [Agentforce for Commerce](#)

Custom Action: AttachPromotionToCampaign

Use this action to create a Salesforce Promotion record. Use this action immediately after the identifyRecordByName action, to get a record ID for the input.

Action Detail

API Name	AttachPromotionToCampaign
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	Campaign Id Promotion Id Promotion Segment Id WebStore Id
Outputs	Information Campaign Record
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Attach the new promotion to the Spring Sale campaign.”

- “Can you link this promotion to the Holiday Discount Campaign?”
- “Add the created promotion to the Summer Campaign.”
- “I need to attach the XYZ promotion to the ABC campaign.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: CreateOrUpdateCategory

Use this action to either create a category or to update a category with products.

Action Detail

API Name	Create_Category_for_Products
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	categoryDescription categoryId categoryName parentCategoryId productRecords webStoreId
Outputs	categoryRecord
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “In my web store [store name], create a category [category name] for the products [product 1] and [product 2].”
- “Create a new category called ‘Electronics’ in the webstore.
- “Update the ‘Clothing’ category by including these new products.”
- “Create a category named ‘Books’ under the ‘Media’ parent category and add these products to it.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Create Product Bundle

Use this action to create a bundle in your Commerce store.

Action Detail

API Name	Create_Product_Bundle
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	bundleName
Outputs	productBundle
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “In my web store [store name], create a product bundle [bundleName].”
- “Create a new product bundle for the holiday season.”
- “Create a bundle named ‘Summer Essentials’.”
- “Create a bundle for items that are frequently bought together.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Create Product

Use this action to import products from Google Drive. Use this action immediately after the identifyRecordByName action to get a record ID as input for the WebStore ID.

Action Detail

API Name	Create_product
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	User Prompt: Google spreadsheet URL User Prompt: webStoreId

Outputs	infoMessage numberOfRowsError numberOfRowsProcessed numberOfRowsRead
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Create products from this Google spreadsheet URL: [Google Sheets URL]”
- “Use this spreadsheet to create products in the B2C store: [Google Sheets URL].”
- “Add new products from the following Google sheet: [Google Sheets URL].”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Fetch Active Products not ready but already in storefront

Use this action to fetch a list of products from your Commerce store that have been marked Active but aren't ready.

Action Detail

API Name	Fetch_Active_Products_not_ready_but_already_in_storefront
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	webStoreId
Outputs	Information Product Records
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Show me the products that are active but not ready in the storefront.”

- “Fetch the active products that are not ready in the webstore.”
- “Which products are active in the store but not yet ready?”
- “List the products that are active in the storefront but should not be.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Fetch Ready to Activate Products

Use this action to fetch a list of products that are ready to be activated in your Commerce store.

Action Detail

API Name	Fetch_Ready_to_Activate_Products
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	webStoreId
Outputs	Information Product Records
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Show me the products that are ready to be activated in the storefront.”
- “Fetch the products that are ready for activation in the webstore.”
- “Which products are ready to be activated in the store?”
- “List the products that are ready for activation in the storefront.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Find Low Selling Products

Use this action to view a list of products that are low-selling.

Action Detail

API Name	Find_low_selling_products
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	count webStoreName
Outputs	Information result
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Show me the low selling products in the B2C Store.”
- “Find the products with the least sales in the webstore.”
- “Which products are not selling well in the online store?”
- “List the low selling products in the B2C Store.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Find Suggested Bundles

Use this action to view suggested product bundles related to a particular product bundle.

Action Detail

API Name	Find_suggested_bundles
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	productInput webStoreName
Outputs	count Information result

Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Show me the suggested bundles for the B2C Store.”
- “Find product bundles that are frequently brought together in the webstore.”
- “What are the suggested bundles for the XYZ product?”
- “Give me some bundle suggestions for the online store.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Generate Meta Description

Use this action to generate the description for a product metadata.

Action Detail

API Name	Generate_Meta_Description
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	productRecords
Outputs	updatedProducts
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Generate meta descriptions for these product IDs: [list of product IDs].”
- “Create SEO meta descriptions for the products in the B2C Store.”
- “I need meta descriptions for the following products: [list of product IDs].”
- “Can you generate meta descriptions for these products?”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Generate Product Descriptions

Use this action to generate a description for a product.

Action Detail

API Name	Generate_Product_Descriptions
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	productRecords
Outputs	updatedProducts
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Generate new descriptions for these product IDs: [list of product IDs].”
- “Create product descriptions for the following products.”
- “I need updated descriptions for these products: [list of product IDs].”
- “Can you generate descriptions for these product records?”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Generate SEO Meta Title Tag for Products

Use this action to generate the search-engine optimized Title tag for the product metadata.

Action Detail

API Name	Generate_SEO_Meta_Title_Tag_for_Products
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	productRecords

Outputs	updatedProducts
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Generate SEO meta title tags for these product IDs: [list of Product IDs].”
- “Create SEO meta titles for the products in the B2C Store.”
- “I need SEO meta title tags for these products: [list of Product IDs].”
- “Can you generate SEO meta titles for these products?”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Get SEO Score

Use this action to get the SEO score and insights for a product page.

Action Detail

API Name	Get_SEO_Score
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	productId webstoreId
Outputs	result
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Get the SEO score for product ID [Product ID] in the B2C Store.”
- “Retrieve the SEO score for the following product.”
- “What is the SEO score for this product in the webstore?”
- “Show me the SEO score and insights for product ID [product ID].”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Save Boost/Bury Rules

Use this action to save boost and bury rules for your web store.

Action Detail

API Name	Save_Boost_Bury_Rules
Action Type	Custom
Reference Action Type	Apex
Inputs (as part of a prompt)	End Date Level Product Ids List Rule Name Rule type Start Date Webstore Id
Outputs	Information
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Boost the visibility of product IDs [list of product IDs] in the B2C Store.”
- “Create a rule to bury these products in the webstore.”
- “I need to boost the following products for the next month.”
- “Set up a rule to bury product IDs [list of product IDs] starting today.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Update Product IsActive

Use this action to update the IsActive flag for products in your web store.

Action Detail

API Name	Update_Product_IsActive
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	activateProducts productIDs
Outputs	FaultMessage productIDs
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “Activate Product ID [product ID] in the B2C Store.”
- “Deactivate the following product in the webstore.”
- “Set the product ID [product ID] to active.”
- “Update the active status of these products.”

See Also:

- [Agentforce for Commerce](#)

Custom Action: Update Price for Products

Use the Update Price for Products action to set a new price for products in your Commerce store.

Action Detail

API Name	Update_Price_for_Products
Action Type	Custom
Reference Action Type	Flow
Inputs (as part of a prompt)	productId sellingPrice webstoreId
Outputs	updatedProductRecord
Does this action execute one or more prompt templates?	No
Required Setup	Agentforce Skills for Merchandising

Examples of Utterances That Trigger This Action

- “In my web store [name of web store] update the price of the product [product name] to USD [price].”
- “Change the selling price of this product.”
- “Set the new price for product ID [product ID] in the B2C Store.”
- “Adjust the prices of these products to \$[new price].”

See Also:

- [Agentforce for Commerce](#)