

Agentforce OMS Agent Architecture & Setup Guide

This guide will walk you through the steps to add these actions to an existing Agent.

Solution Overview and Architecture

This package contains three Agent Actions:

1. OMS Agent : Guest Order Lookup
2. OMS Agent : Create RMA
3. OMS Agent : Cancel Item

OMS Agent Guest Order Lookup:

Description:

This action uses a Flow to retrieve Order Summary Details and related Order Summary Item(s), and Order Shipment details. To use the Action, the user must provide the Order Number and Billing Email Address for an Order Summary record.

Action:

- OMSAgent : Guest Order Lookup

Flow:

- OMS_Agent_Guest_Order_Lookup

Inputs:

- OrderSummary.OrderNumber
- OrderSummary.BillingEmailAddress

Outputs:

- Order Summary (Single Record)
- Order Item Summaries (Collection Variable)
- Order Shipment (Collection Variable)
- reasonCodes (Text list, Reason Codes for Return or Cancel)

VIEW > AGENT ACTION DETAILS

OMS Agent: Guest Order Lookup

Agent Action API Name
OMS_Agent_Guest_Order_Lookup

Last Modified
12/15/2024, 01:10 AM

Assigned to Active Agent
[Avatar]

Reference Action

Agent actions make the functionality you already have in Salesforce available to use with an agent. These are the details of the action that your agent action references. Changes to the reference action can affect your agent action.

OMS_Agent_Guest_Order_Lookup

Reference Action Type
Flow

Last Modified
12/15/2024, 01:09 AM

Last Modified By
Warren Holmes

Status
Active

Description
Retrieve Order details from the OrderSummary and related OrderItemSummary records using the Order Number and Email address as inputs.

Agent Action Configuration

Agents use a large language model to make decisions and generate conversational responses. The instructions and settings for an agent action tell the LLM how and when to use the action.

Agent Action Label
OMS Agent: Guest Order Lookup

Agent Action Instructions
Retrieve Order details from the OrderSummary and related OrderItemSummary records using the Order Number and Email address as inputs.

Require user confirmation
☐

Inputs

1 OrderEmailInstructions
The email address the shopper used when they placed the order.

Advanced Settings

Data Type
lightning__textType

Require Input
☒

Collect data from user
☒

2 OrderNumberInstructions
The Order Number that identifies the specific order.

Advanced Settings

Data Type
lightning__textType

Require Input
☒

Collect data from user
☒

Outputs

1 OrderItemsInstructions
A collection of Order items, includes fields for the product name, description, and quantities.

Advanced Settings

Data Type
lightning__richText

Filter from agent action
☐

Show in conversation
☒

Output Rendering
List

2 OrderShipmentsInstructions
A collection of Order Shipments, includes fields for the tracking number, tracking url, and expected delivery date.

Advanced Settings

Data Type
lightning__richText

Filter from agent action
☐

Show in conversation
☒

Output Rendering
List

3 OrderSummaryInstructions
The details of the order that the user requested. The results include the order reference number, created date, order status, and total amount.

Advanced Settings

Data Type
lightning__recordTypeInfo

Filter from agent action
☐

Show in conversation
☒

Output Rendering
Object

4 reasonCodesInstructions
A text list of possible reasons used to create a return order or cancel an item

Advanced Settings

Data Type
lightning__richText

Filter from agent action
☐

Show in conversation
☒

Output Rendering
List

OMS Create RMA

Description:

This action uses a Flow to create a Return Order for a single item in an Order Summary. To complete the Return, the user must provide the Item, Quantity, Reason, and specify if the return is a Replacement or Refund. Return Reasons and OrderItemSummary.Id can be provided by the Guest Order Lookup Action.

Action:

- OMS Agent : Create RMA

Flow:

- OMSAgent_Create_RMA

Inputs:

- OrderItemSummary.Id (Single Record)
- QuantityToReturn (Number)
- Replacement Method(Text)
- ReturnReason (Text)

Outputs:

- ReturnOrderNumber (Text)

OMS Agent : Create RMA

Agent Action ID: OMSAgent_Create_RMA

Last Modified: 10/25/2024, 10:22 AM

Assigned to Agent: [User Icon]

Reference Action

Agent actions make the functionality you already have in Salesforce available to use with an agent. These are the details of the action that your agent action references. Changes to the reference action can affect your agent action.

OMSAgent_Create_RMA

Reference Action Type: Flow

Last Modified: 10/25/2024, 10:22 AM

Last Modified By: [User Icon]

Status: Active

Description: This reference action is a specific item in an order.

Agent Action Configuration

Agents use agent actions to make decisions and generate conversational responses. The instructions and settings for an agent action tell the system what to do when the action is used.

Agent Action ID: OMSAgent_Create_RMA

* Agent Action Instructions: This is the primary action for a specific item in an order. ✓

Prepares user information. ✓

Shows loading text for this action. ✓

Inputs

OrderItemSummaryId instructions

The unique Salesforce CRM record identifier for the item being returned. ✓

Advanced Settings

Date Type: [Dropdown]

Matching: [Dropdown]

Required Input: [Dropdown]

Collect data from user: [Dropdown] ✓

QuantityToReturn instructions

The quantity for the item to be returned. If not provided, the Quantity provided by the user is used. ✓

Advanced Settings

Date Type: [Dropdown]

Matching: [Dropdown]

Required Input: [Dropdown]

Collect data from user: [Dropdown] ✓

ReplacementMethod instructions

Text input of either "Replacement" or "Refund". ✓

Advanced Settings

Date Type: [Dropdown]

Matching: [Dropdown]

Required Input: [Dropdown]

Collect data from user: [Dropdown] ✓

ReturnReason instructions

The reason for the return. Agents provide additional context provided by the list variable ReturnReasons. ✓

Advanced Settings

Date Type: [Dropdown]

Matching: [Dropdown]

Required Input: [Dropdown]

Collect data from user: [Dropdown] ✓

Output

ReturnOrderNumber instructions

The return order number to share with the user. ✓

Advanced Settings

Date Type: [Dropdown]

Matching: [Dropdown]

Filter from agent action: [Dropdown] ✓

Show a connector: [Dropdown] ✓

Output formatting: Text ✓

OMS Cancel Order

Description:

This action uses a Flow to cancel a single item in an Order Summary. To cancel the item, the user must provide the Item, Quantity, Reason, OrderItemSummary.Id can be provided by the Guest Order Lookup Action.

Action:

- OMS Agent : Cancel Item

Flow:

- OMSAgent_Cancel_Item

Inputs:

- CancelReason (Text)
- OrderItemToCancel (Text)
- QuantityToCancel (Number)

Outputs:

- OutputMessage (Text)

Reference Action

Agent actions make the functionality you already have in Salesforce available to use with an agent. These are the details of the action that your agent action references. Changes to the reference action can affect your agent action.

OMSAgent_Cancel_Item

Reference Action Type

Flow

Last Modified

12/5/2024, 12:24 PM

Last Modified By

Sandra Gordon

Status

Active

Description

A flow that will cancel a product from an Order Item Summary. The user must provide the OrderItemSummary.Id, quantity to cancel, and the reason for cancellation.

Agent Action Configuration

Agents use a large language model to make decisions and generate conversational responses. The instructions and settings for an agent action tell the LLM how and when to use the action.

Agent Action Label

OMSAgent - Cancel Item

Agent Action Instructions

A flow that will cancel a product from an Order Item Summary. The user must provide the OrderItemSummary.Id, quantity to cancel, and the reason for cancellation.

Require user confirmation

Show loading text for this action

Inputs

1 CancelReason Instructions

The reason the user wants to cancel the order.

Advanced Settings

Data Type

lightning__textType

Require Input

Collect data from user

2 OrderItemToCancel Instructions

The unique id of the Order Item Summary record for the product the user wants to cancel.

Advanced Settings

Data Type

lightning__textType

Require Input

Collect data from user

3 QuantityToCancel Instructions

The quantity to cancel for the Order Item. The QuantityToCancel cannot exceed the items quantity available to cancel.

Advanced Settings

Data Type

lightning__numberType

Require Input

Collect data from user

Output

1 OutputMessage Instructions

The user message with details of the cancellation or an error if unsuccessful.

Advanced Settings

Data Type

lightning__textType

Filter from agent action

Show in conversation

Output Rendering

Text

Installation Guide

1. Pre Requisites

- Agentforce Add-On
- Salesforce Order Management
- Complete the Agentforce Setup Guide and create an Agent from a Type:
https://help.salesforce.com/s/articleView?id=ai.agent_setup_type.htm&type=5

2. Create a New Agent

If you would like to add these actions to an existing action, skip to step 3.

1. Click the + New Agent button
2. Select Agentforce Service Agent, then Next
3. Remove the standard “Order Management” Topic from the agent, we will replace this with the OMS Agent Topic. Additionally, you can remove any other topic you do not wish to include.
4. Complete the Name, Description, Role, and Company fields.
5. For Agent User, select “New Agent User”
6. (Recommended) Enable the checkbox “Enrich event logs with conversation data”
7. Click Create

3. Create a New Topic:

Order Management:

Topic Label	Order Management
Classification Description	Provide Order Status updates, a summary of items included in the order, assist users with returns or cancellations.
Scope	Your job is to handle inquiries related to order information. Ensure that users can obtain comprehensive order details.
Instructions	

1	When the user demonstrates the intention to check for an order, ask for their email address and order number before invoking the action OMS_Agent_Guest_Order_Lookup
2	After a successful response from OMS_Agent_Guest_Order_Lookup, use the information from the response to produce a output like the following:#### BEGIN EXAMPLE OUTPUT #### Here's information about your order {orderNumber}:The order has been created in {createdDate}, and the order status is {status}.Total: \${TotalAmount}The order has been created in {createdDate}, and the order status is {status}.Total: \${TotalAmount}2. Product Name: {Line Item 2 Product Name}Quantity: {Line Item 2 Quantity}SubTotal: \${Line Item 2 TotalLineAmount}Available to Cancel" Line Item 2 QuantityAvailabletoCancel}If you want to know more details about your orders go to: {Order Url} #### END EXAMPLE OUTPUT ####Dates should be in the format MM/DD/YY.
3	When a users asks to return or cancel an item, use the context of the conversation to determine if an ordersummaryId has already been provided, if not ask the user for their order number and email address so you can find their order using the OMS_Agent_Guest_Order_Lookup action.
4	Before invoking the OMSAgent_Create_RMA action, ask the user which item they would like to return, Only allow items where QuantityAvailableToReturn > 0, the quantity to return cannot be greater than QuantityAvailableToReturn, Always ask the user for the reason for the return by creating a list from reasonCodes, and ask the user for the replacement method: refund or replacement
5	For Order Url, use the order id retrieved by OMS_Agent_Guest_Order_Lookup as orderId to create a URL. The URL should be presented as text and not a link. The URL should be like this https://{mydomain}.my.site.com/{store}/ordersummary/orderId .
6	Before invoking the OMSAgent_Cancel Order action, ask the user which item they would like to cancel, Only allow items where QuantityAvailableToCancel > 0, the quantity to return cannot be greater than QuantityAvailableToCancel, Always ask the user for the reason for the return by creating a list from reasonCodes.
Actions	
1	OMS Agent: Guest Order Lookup

2	OMS Agent: Create RMA
3	OMS Agent: Cancel Item

4. Create a Permission Set for your Agent

Before you can test your agent, you will need to create a permission set to grant access to orders, returns, and cancellations. First create the permission set, then we will add it to your agent user.

1. In Setup, search for Permission Sets.
2. Find the Permission Set "Order Management Agent"
3. Click "Clone"
4. For Label, use "Agentforce OMS Agent Permissions"
5. Click save.
6. On the Permission Set, Click "Object Settings"
7. Find "Return Orders" and click edit.
8. Under Object Settings, enable "Edit" access.
9. Click Save.

5. Assign Permission Sets to your Agent

Before you can test your agent, you must grant Object and Permission access to the Einstein Agent User.

In Setup, search for Permission Sets.

10. Find the Permission Set "Agentforce OMS Agent Permissions"
11. Click Manage Assignments
12. Assign the Permission set to your Agent User (ie EinsteinServiceAgent User).

6. Test OMS Agent in the Builder

- In the Agent Builder screen, type "can I check my order" and see if you get a response
 - Use the OrderNumber from an OrderSummary (ie UVTCT-6ZEJD-U3Z2Y-QLDEU)
 - Use the BillingEmailAddress from the same OrderSummary record (if null, update with an email address)
- To Return an item:
 - Open the OrderSummary Record and look for the Fulfillment Order related list.
 - Open the Fulfillment Order and change the status to 'Fulfilled'
- To Cancel an item:
 - Open the OrderSummary Record and look for the Fulfillment Order related list.

- Open the Fulfillment Order and change the status to 'Cancelled'

