

salesforce

Agentforce for Commerce

B2C Workshop Handbook

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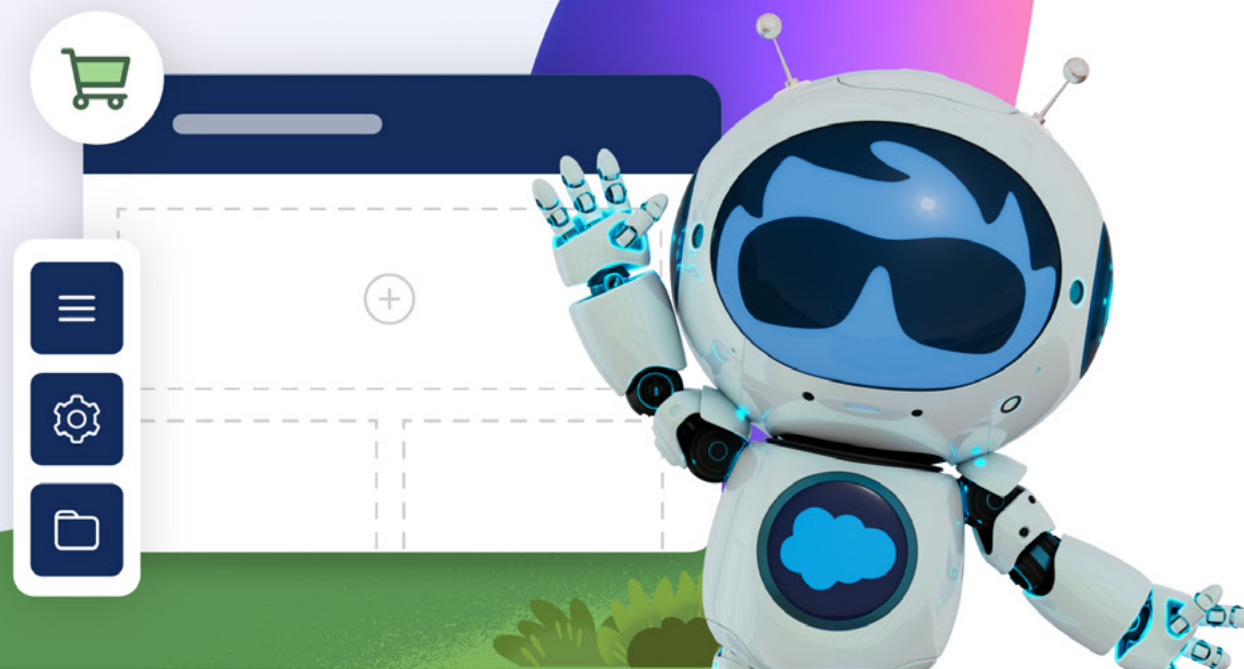
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Welcome



Today's workshop will equip you with the skills and tools necessary to transform commerce interactions using Agentforce within the Salesforce Commerce Cloud. As you navigate through the sessions, you will learn to set up, customize, and optimize commerce shopping agents, thereby enhancing customer satisfaction and streamlining operational efficiencies across various commerce scenarios.

Your Own Workshop Environment

You'll receive credentials to access your own Salesforce environment, or 'org'. No development skills are needed to participate – this space is designed for hands-on exploration of Salesforce's capabilities. You'll have access to your org for the next **7 days**, giving you time to revisit and share the exciting features you created during the workshop.

Let's get started.

Trail 1: Build a Commerce Shopper Agent with Order Management

In this section, you'll set up your first agent with things like product recommendations and order management, setting the stage for more complex actions later in the workshop.

Next Steps

[Log in to Your Org](#)

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Log In to Your Org

Visit login.salesforce.com. Complete the form to receive your login credentials. Your unique workshop code will then be provided to you by the trail guide.


Fill out your credentials below:

Username:

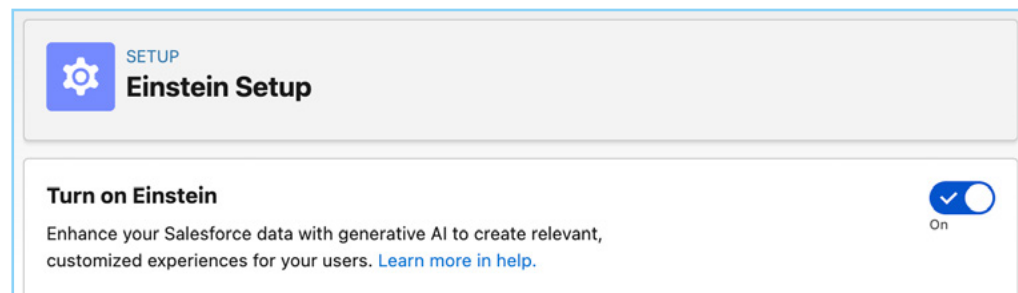
Password:

Initial Org Configuration



Activate Einstein Generative AI

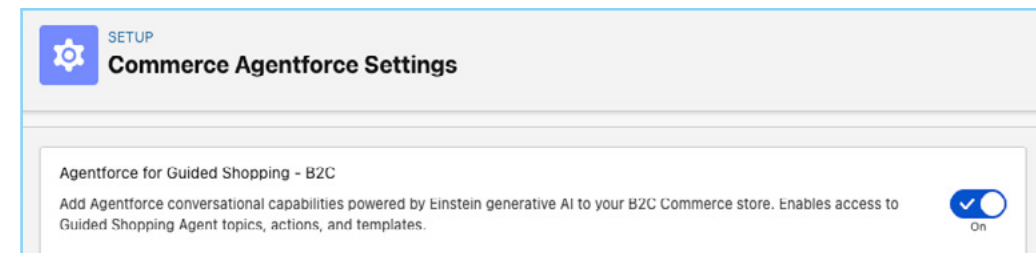
1. Click the **Gear** icon ⚙️ in the top-right corner to open **Setup**.
2. In the **Quick Find** search bar, type **Einstein Generative AI** and select **Einstein Setup**.
3. Toggle the switch to **On**. 
4. Refresh the page.

That's it! Einstein and Agentforce are now enabled and ready to be used across commerce.






Activate Agentforce for B2C Commerce

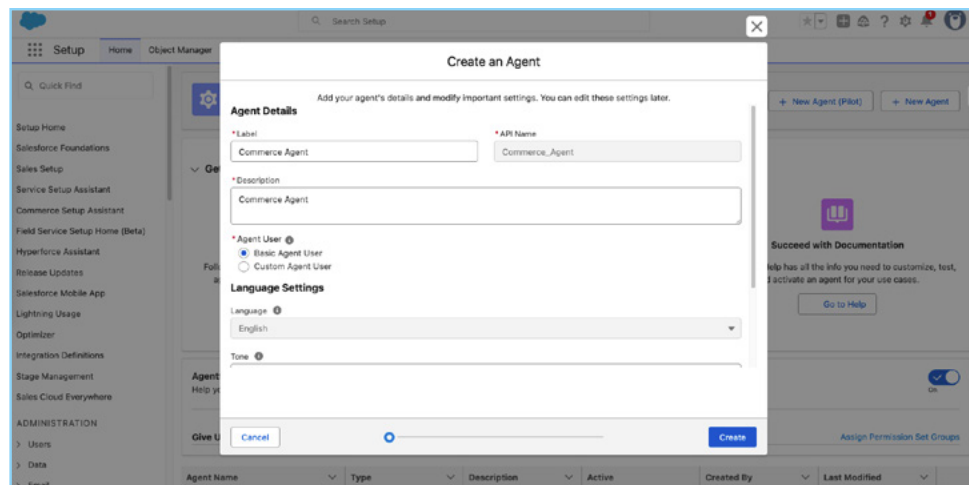
1. Using the **Quick Find** search bar within Setup, type **Commerce Agentforce Settings**.
2. Toggle the switch to **On**. 
3. Refresh the page.
4. Search for Agentforce agents.
5. Toggle the **Agentforce** switch **On**. 





Build Your Commerce Agent

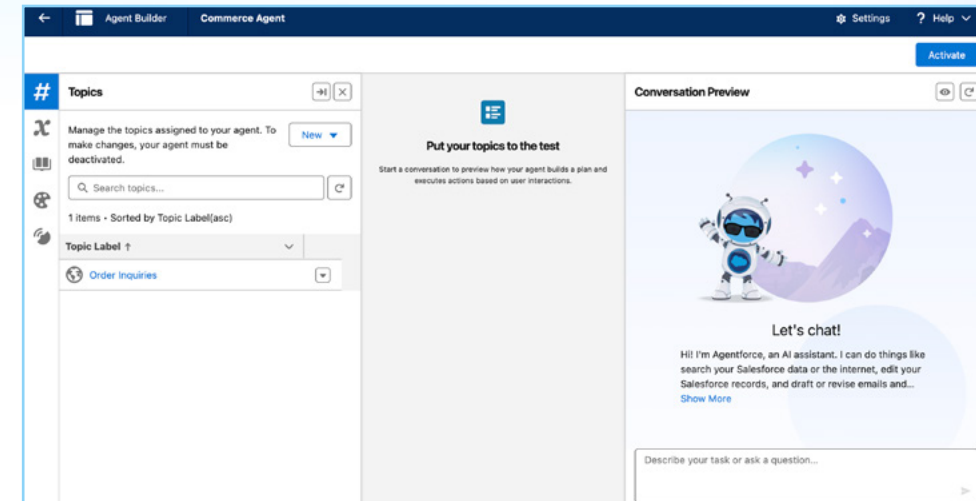
1. In the Quick Find box, Search for Agentforce Agents
2. Click **+ New Agent**. 
3. Select the **Agentforce for Guided Shopping – B2C** template.
4. Hit **Next**  in the top right corner.
5. Remove the **Search for B2C Order** topic by clicking the Added box to its right.
6. Hit **Next** in the top right corner.

7. Complete the **Define Settings** required fields.
 - In the **Role** field, enter “You are a commerce agent to help customers shop”.
 - In the **Company** field, enter “You sell sporting equipment for Northern Trail Outfitters”.
8. Hit **Next** in the top right corner.
9. Click **Create**  to finalize the agent setup.



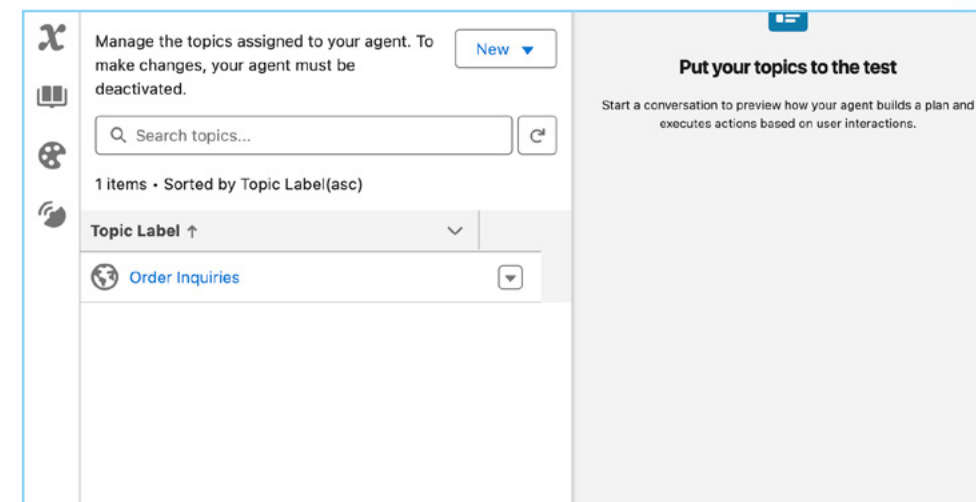
Configure Your Agent

1. In the Agent Builder screen, select **New**  and **Add from the Asset Library**.  Add from Asset Library
2. From the library, add the **Order Inquiries** topic.
3. Select **Finish** in the bottom right corner.

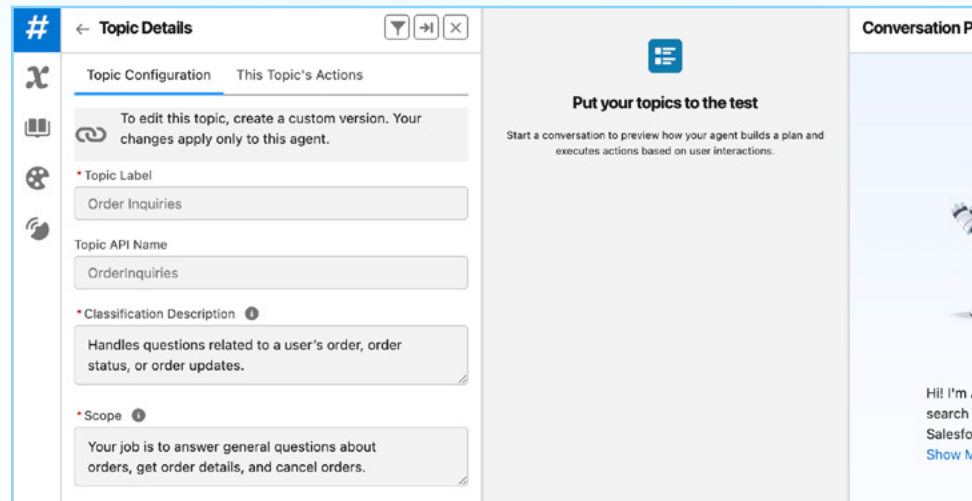


Review and Test Your Commerce Agent in the Builder

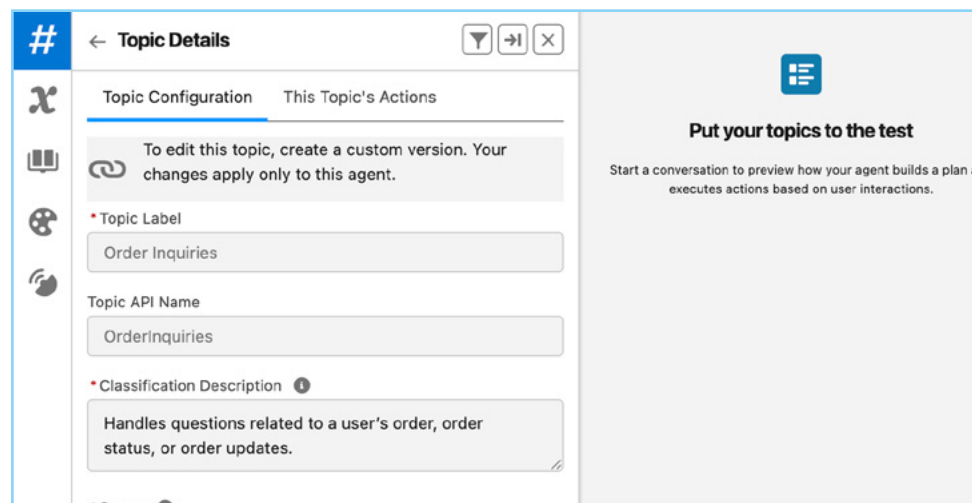
1. Select the **Order Inquiries** Topic label in the left-hand pane.



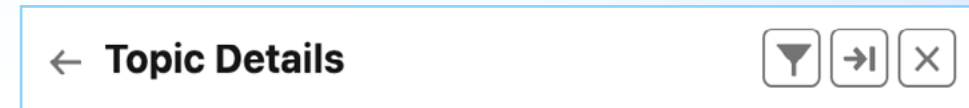
2. Review the **Topic Configuration** and associated **Instructions** sections.



3. Review **This Topic's Actions** section.



4. Click the **back arrow** next to the **Topic Details** label in the left-hand pane.



5. In the Agent Builder, click the **Got It** button in the chat preview then the refresh icon at the top right of the **Conversation Preview** text box.



6. Test what you have just created. Type “Where is my order” in the **Conversation Preview** text box:
- When prompted, enter this email address:
lbailey@example.com
 - When prompted, enter this order number:
PUAWZ-6J7KK-4GOLE-ZQR27
 - Type “Cancel this order”.

Congratulations!

You just created a commerce agent with an order management topic.



Trail 2:

Enhance Your Agent with Product Recommendations

Our next trail focuses on integrating advanced product recommendation functionalities. This enhancement will personalize customer interactions and boost sales through your commerce agent.


Next Steps

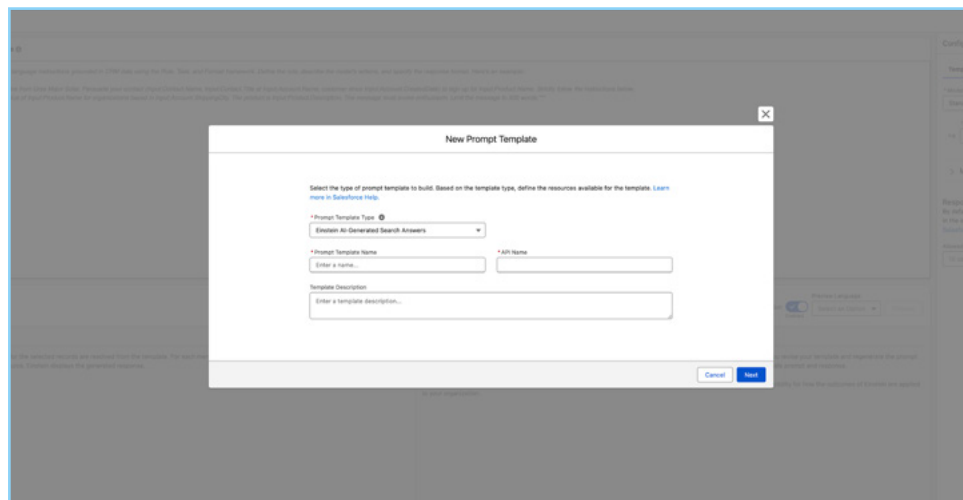
[Create Prompt Template](#)

[Build Agent Action from a Prompt](#)



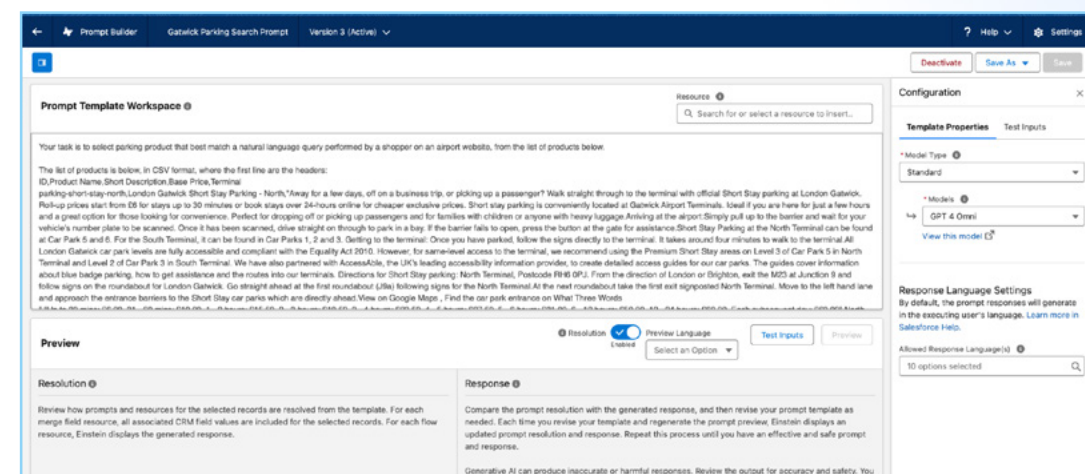
Create Prompt Template

1. Go to **Setup** and select **Prompt Builder**.
2. Click “New Prompt Template”.
3. Set the Prompt Template Type to “Flex” and enter the following information in the specified fields:
 - a. **Name:** Airport Parking Search
 - b. **API Name:** Airport_Parking_Search
4. Next add the source information:
 - a. **Name:** User Query
 - b. **API Name:** User_Query
 - c. **Source Type:** Free Text
5. Click **Next**. 





Configure the Prompt Template

1. In the **Configuration Panel**, navigate to the **Template Properties** tab.
 - a. Set the **Model Type** field to **Standard**.
 - b. Select **GPT 4 Omni** from the **Models** field.
2. In the **Prompt Template Workspace**, copy the content from [Parking Search Prompt](#).
 - a. Click the link to open the Google Drive folder
 - b. Click **More actions** ⋮ on the upper right corner and select **Download**
 - c. Open the .txt file in your Downloads folder
3. Click **Save and Activate** the prompt.



Build an Agent Action from a Prompt

- Return to **Setup** via the in-app back icon from the top left and search for **Agentforce Assets** and tab over to **Actions** then select **+ New Agent Action**.
- In the form that appears, enter the following details:
 - Reference Action Type:** “Prompt Template”
 - Reference Action:** “Airport Parking Search”
 - Agent Action Label:** “Airport_Parking_Search”
 - Agent Action API Name:** “Airport_Parking_Search”
- Click **Next**. 
- In the subsequent setup fields, complete the required information:
 - Agent Action Instructions:** “This action helps the customer find the right parking solution”.
 - Loading text:** “Finding Parking”.
 - Input Query Instructions:** “Provide the customer context needed for the query”.
 - Outputs – Prompt Response:** Ensure it is set to “Show in Conversation” to display responses in the chat. Click **Finish**. 

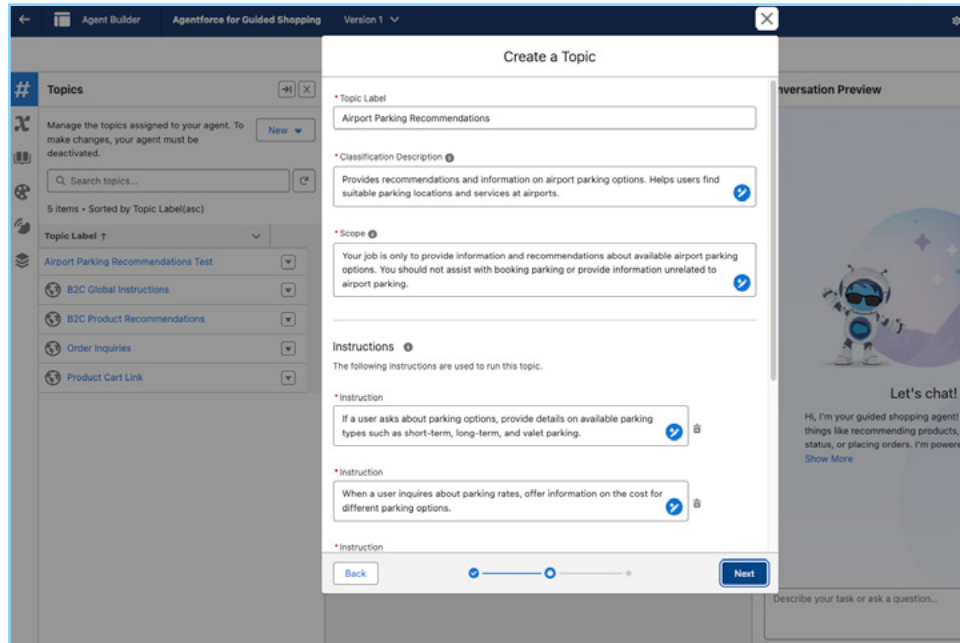
Enhance Your Agent with Product Recommendation Topic

Add a New Topic for Recommendations

- Find and open your **Commerce Agent**, which should be open in another tab.
- Click **New** then select **+ New Topic** to start creating a new topic.
- Populate the text field with “Help customers find airport parking”.
- Review the AI generated topic details.



- Hit the refresh icon in the popup widows top right corner & search for **Parking**.

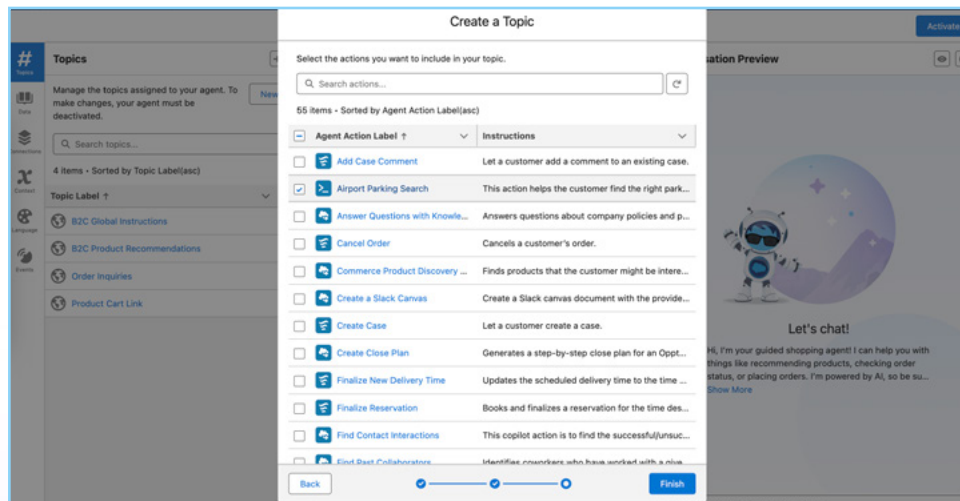


Now let's test your agent

- Refresh the agent conversation preview in the top right corner.
- Ask the agent for help with finding parking.
- Provide future travel dates and converse with the agent to find the right parking solution.

Congratulations!

- Select **Finish**.



Trail 3:

Connect Your Agent to B2C Commerce and Enable Store Search

Lastly, you'll integrate your commerce agent with B2C Commerce, enabling it to perform complex store searches and provide timely, location-based product information.


Next Steps

[Connect with B2C Commerce](#)




Connect with B2C Commerce

Configure to B2C Commerce


1. Go to **Setup** and select **Remote Site Settings**.
2. Click **New Remote Site** and input the following:
 - a. **Name:** sfcc_zzse_022
 - b. **URL:**
<https://zzse-022.dx.commercecloud.salesforce.com>
3. Click **Save and New** to add another Remote Site:
 - a. **Name:** sfcc_slas_auth
 - b. **URL:**
<https://kv7kzm78.api.commercecloud.salesforce.com>
4. Click **Save**. 

Configure CORS Settings


1. In Setup, select **CORS** and click **New**.
2. Enter the Origin URL Pattern:
https://*.dx.commercecloud.salesforce.com
3. Click **Save**. 

Configure and Enable Store Search

Add Store Search Code

1. Go to **Setup**, find **Apex Classes**, and click **New**.
2. Paste the code from [CommerceCloudStoreSearch](#) into the new class.
 - a. Click the link to open the Google Drive folder
 - b. Click **More actions** ⋮ on the upper right corner and select **Download**
 - c. Open the .txt file in your Downloads folder
3. Click **Save**. 

Turn APEX Class Into Agent Action

1. Search for **Agentforce Assets** and tab over to **Actions** then select **+ New Agent Action**.
2. Insert setup details:
 - a. **Reference Action Type:** Apex
 - b. **Reference Action Category:** Invocable Method
 - c. **Reference Action:** CC Store Search by Postcode
 - d. **Agent Action Label:** CC Store Search by Postcode
 - e. **Agent Action API Name:** CC_Store_Search_by_Postcode
3. Click **Next**. 

Configure Agent Action for Store Search

Enter the following details to configure the Agent Action for searching stores in B2C Commerce Cloud by postcode. Ensure each field is correctly filled as described.

1. Instructions and Loading Text:

- Loading Text:** "Finding Nearest Store".

2. Input **postalCodes** section:

- Instructions:** "Enter the postal code used for searching the store".
- Required:** "Yes"

3. Output Section:

a. Address:

- Instructions:** "This is the address of the store".
- Show in Conversation:** "Yes"

b. City:

- Instructions:** "This is the city of the store".
- Show in Conversation:** "Yes"

c. ID:

- Instructions:** "This is the ID of the store."
- Show in Conversation:** "No"

d. Name:

- Instructions:** "This is the name of the store".
- Show in Conversation:** "Yes"

e. PostalCode:

- Instructions:** "This is the postal of the store".
- Show in Conversation:** "Yes"

4. Click finish.

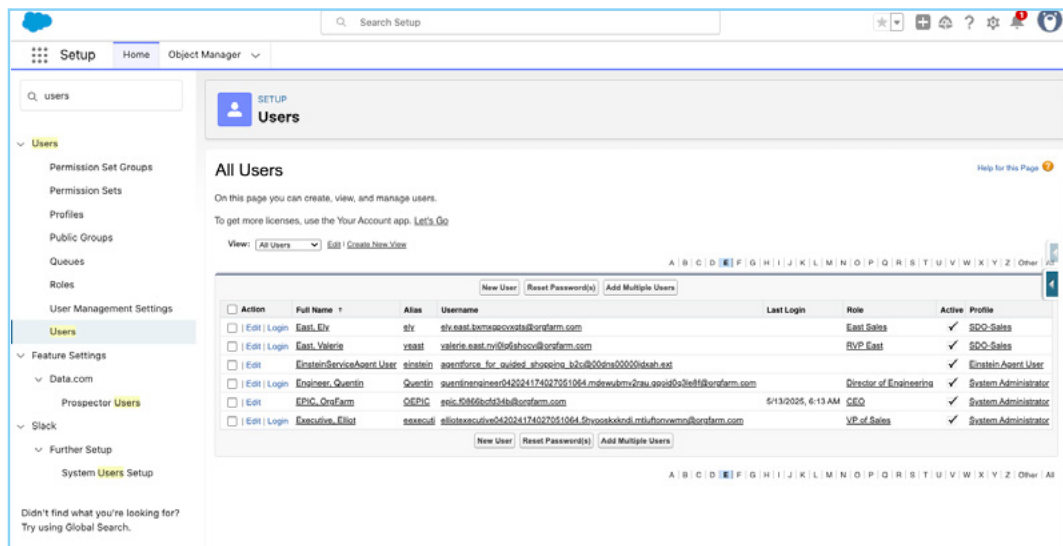
Finish

The screenshot shows the 'Create an Agent Action' configuration page. At the top, it says 'Agent Action Label: CC Store Search by Postcode'. Below that is a text box for 'Agent Action Instructions' with the value 'Search for stores on Commerce Cloud by postcode'. The 'Input' section contains a field for 'postalCodes' with instructions 'This is the post code used for searching the store'. It has checkboxes for 'Require input' (checked) and 'Collect data from user' (unchecked). The 'Outputs' section contains two fields: 'address' with instructions 'This is the address of the store' and 'city' with instructions 'This is the city of the store'. Both output fields have checkboxes for 'Filter from agent action' (unchecked) and 'Show in conversation' (checked). At the bottom, there are 'Back' and 'Finish' buttons.

Assign Agent Permissions

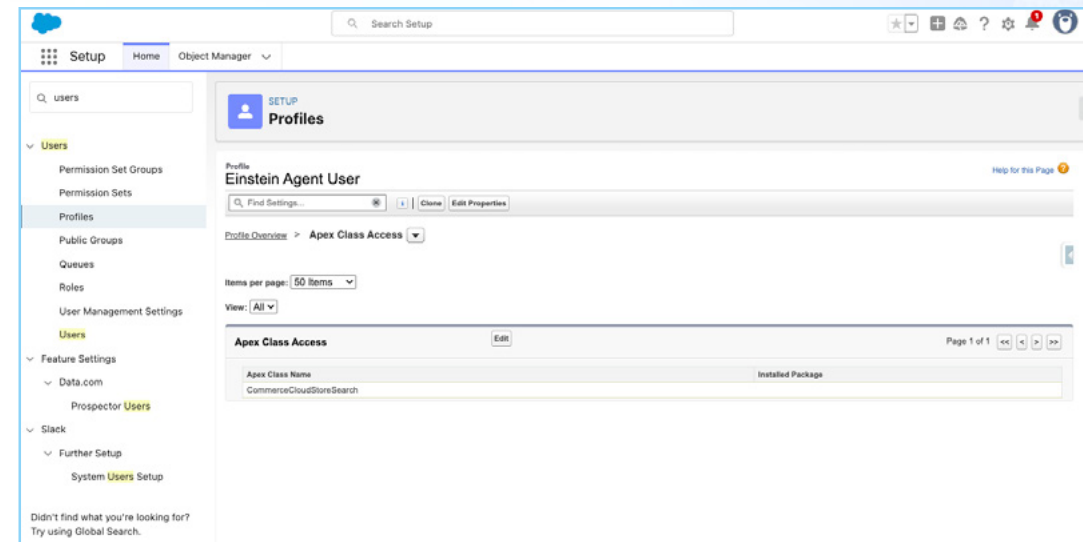
Agents need to be assigned access to apex, objects, and other pieces of data in order to leverage it, maintaining security controls.

- ## 1. Go to **Setup** and select **Users**



2. In the **View** drop down select **All Users**
3. Filter by the letter **E** for Einstein where we will see an EinsteinServiceAgent User
4. To the far right of that users list view row click the hyperlink for the profile named **Einstein Agent User**
5. Select **Apex Class Access** followed by **Edit**



6. Find **CommerceCloudStoreSearch** and check the box

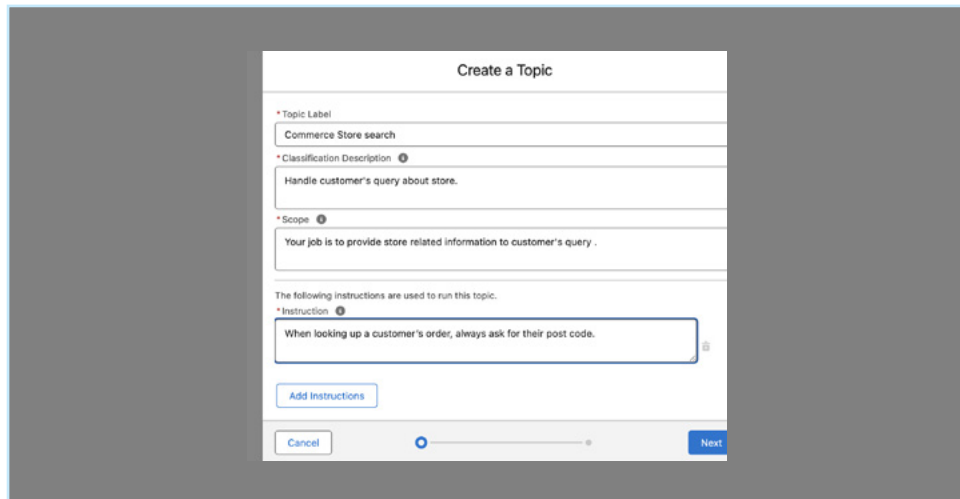


- ## 7. Hit Save



Create Topic for Store Searching from B2C Commerce

1. Find and open your **Commerce Agent**, which should be open in another tab.
2. Click **New**, select **+ New Topic** to begin.
3. Create the new topic with **Store Search by Zip Code** and hit **Next**. 
4. Hit the refresh icon in the popup widows top right corner & search for **CC Store Search by Postcode**.
5. Check the box for CC Store Search Postcode and hit finish. 




Create a Topic



* Topic Label
Commerce Store search

* Classification Description ⓘ
Handle customer's query about store.

* Scope ⓘ
Your job is to provide store related information to customer's query .

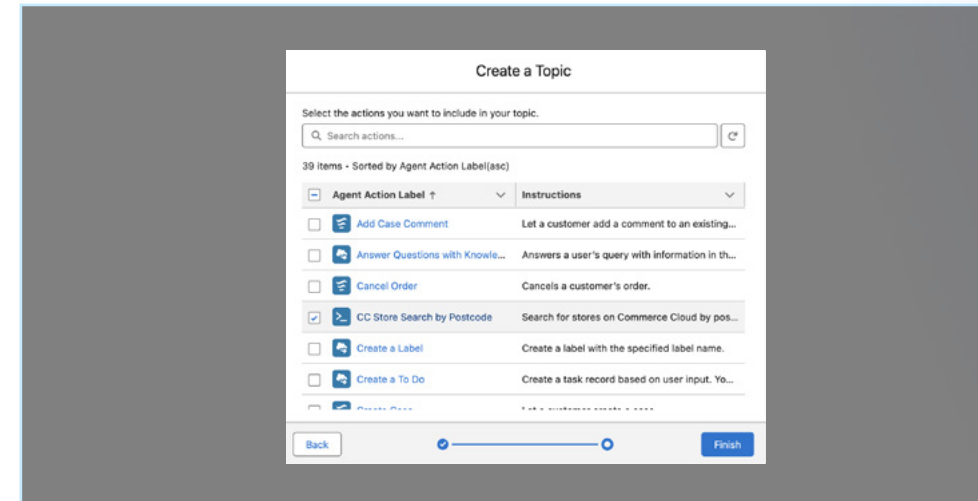
The following instructions are used to run this topic.
* Instruction ⓘ
When looking up a customer's order, always ask for their post code.




 

Now let's test your agent

1. Refresh the agent conversation preview in the top right corner.
2. Ask the agent “Can you find the closest store?”.
3. When the agent asks, leverage zip code **75001**.


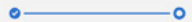



Create a Topic

Select the actions you want to include in your topic.
Q Search actions... 

39 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑	Instructions
<input type="checkbox"/> Add Case Comment	Let a customer add a comment to an existing...
<input type="checkbox"/> Answer Questions with Knowle...	Answers a user's query with information in th...
<input type="checkbox"/> Cancel Order	Cancels a customer's order.
<input checked="" type="checkbox"/> CC Store Search by Postcode	Search for stores on Commerce Cloud by pos...
<input type="checkbox"/> Create a Label	Create a label with the specified label name.
<input type="checkbox"/> Create a To Do	Create a task record based on user input. Yo...
<input type="checkbox"/> Create a Topic	Create a topic based on user input.

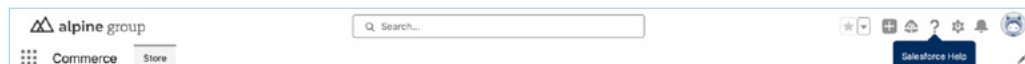
Congratulations!

Keep Exploring

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