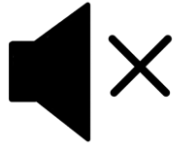


10 Mar, 2026

# Connecting Master Data to Agentforce

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# Housekeeping Tips



- Today's Webinar is scheduled for **1 hour**
- The session will include a webcast and then your questions will be answered live at the end of the presentation
- All dial-in participants will be muted to enable the speakers to present without interruption
- Questions can be submitted to "All Panelists" via the **Q&A option** and we will respond at the end of the presentation
- The webinar is **being recorded** and will be available on our [Success Portal](#) - where you can download the **slide deck** for the presentation. The link to the recording will be emailed as well.
- Please take time to complete the **post-webinar survey** and provide your feedback and suggestions for upcoming topics.

# Safe Harbor

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# Agenda

1

Equip AI Agents with trusted context

2

Agentforce Engine

3

Demo-  
Enable AI agents to access real-time master data

4

Agentic AI in Master Data Value Chain

5

MDM Extension for Agentforce-CAI processes+ API

6

Agentforce + MDM  
Usecase across Verticals

Equip AI Agents with trusted context

# Is your AI guessing? Give Agentforce the truth

AI agents are only as good as the data they access

Poor Data Quality + Silos - Incomplete, inconsistent, or outdated data leads to:

- Inaccurate recommendations
- Poor customer experiences
- Lost business opportunities
- Decreased trust in AI-driven insights

Don't let your AI guess. Power Agentforce with Informatica MDM to deliver accurate, trustworthy AI experiences that drive business value

# Agentforce Fundamentals

Agentforce is Salesforce's Agentic AI platform, enabling businesses to build and deploy autonomous AI agents for various tasks across business functions

## Agentforce Agents

Core of the Platform: Intelligent systems capable of understanding natural language and performing tasks.

Includes pre-built agents (e.g., Service, SDR, Personal Shopper) and allows for custom agent creation.

## Topics

Foundational Building Blocks: Define the scope and context of what an agent can do.

Contain Classification Description (when to use), Scope (high-level overview), and Instructions (specific guidelines)

## Actions

Specific Tasks: The actual tasks an Agentforce agent performs within a topic

Tools that agents use to execute an action or to fetch information from Salesforce data or external systems

### Example Agent:

- Sales Agent
- Service Agent
- Personal Shopper Agent

### Example Topic:

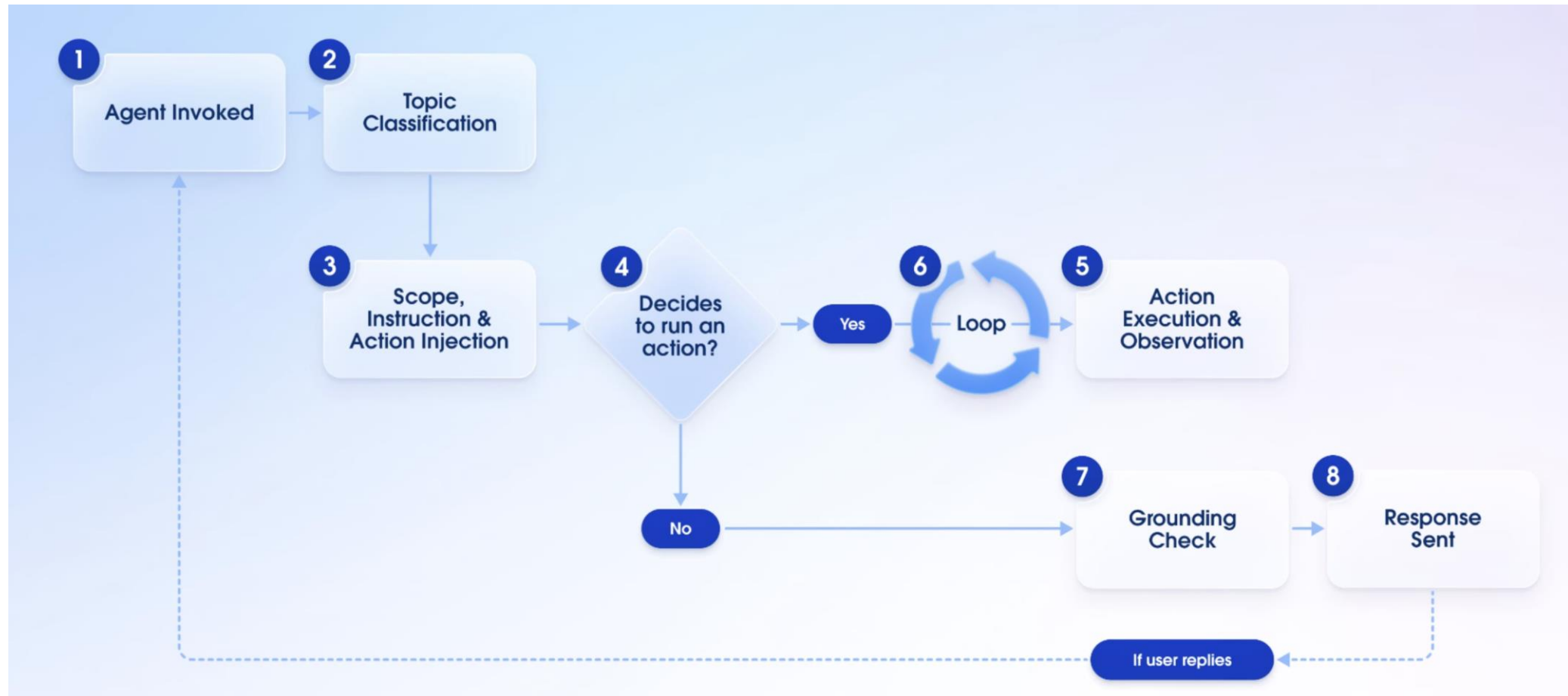
- Sales Agent
- Lead Qualification
  - Product Inquiry

### Example Action:

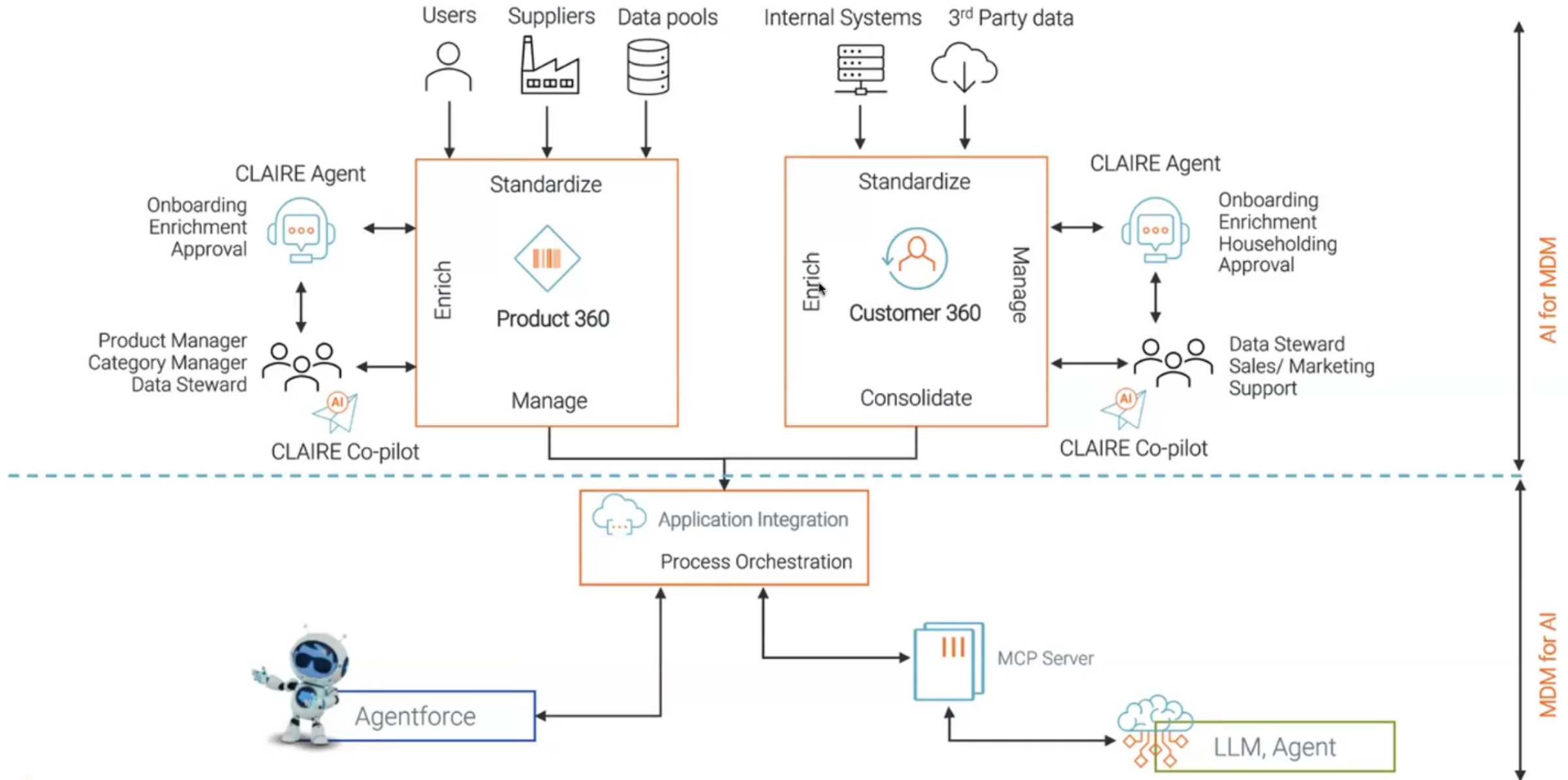
- Lead Qualification Topic
- Identify a Customer
  - Create an Opportunity

# Agentforce Brain

How Atlas Reasoning Engine empower agents



# Agentic AI in Master Data Value Chain



# DEMO



## MDM for AI

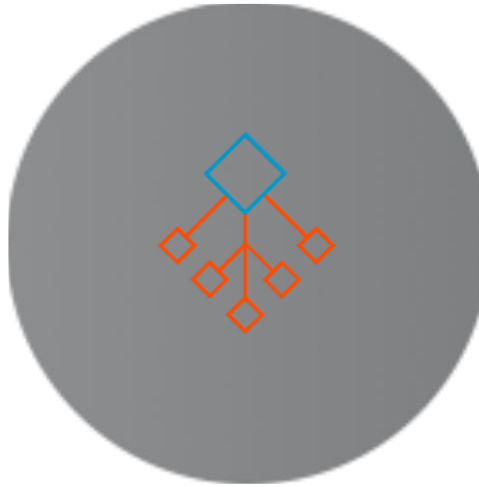
Enable AI agents to perform on-demand searches access accurate, complete, and real-time master data

# MDM Extension for Agentforce

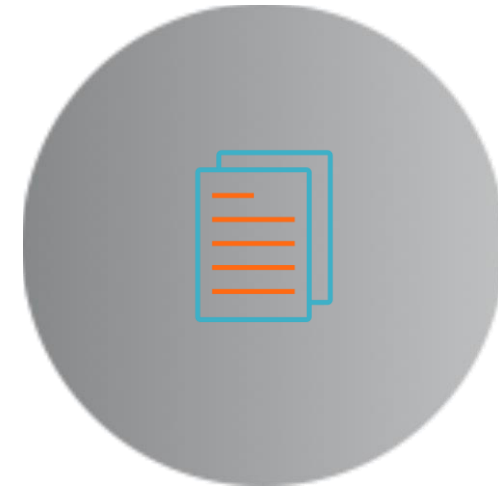
Unlocking the Full Potential of AI Agents with access to Trusted Master Data



Empowers Agentforce Agents with on-demand and seamless access to your trusted, high-quality master data in Informatica MDM



Out-of-the-box Agentforce Actions to Identify and retrieve golden customer & product records including relationships and hierarchies for additional context



Delivered as an easy-to-deploy Salesforce App and a pre-configured Informatica Cloud Application Integration Recipe

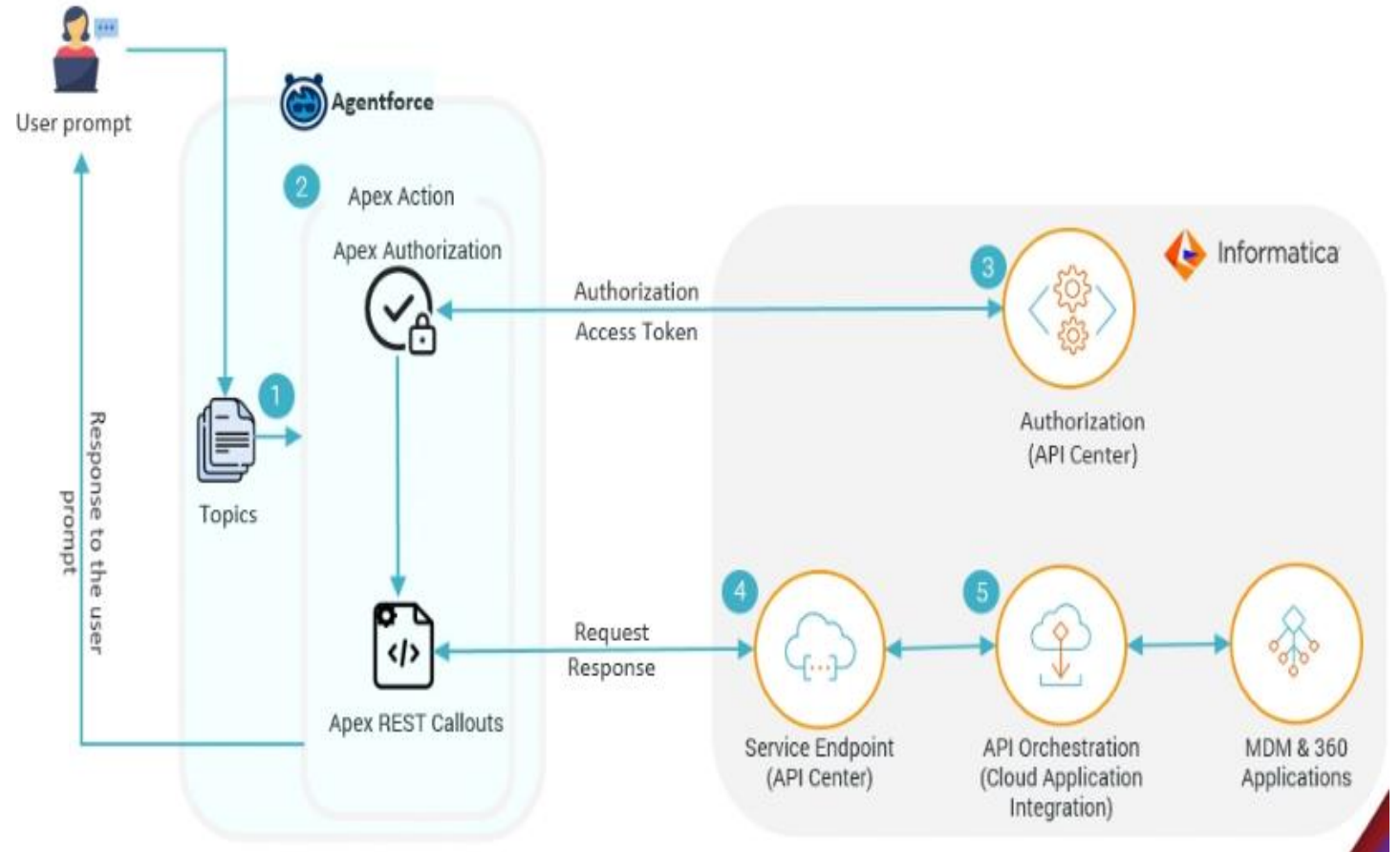
## Business Value

Empowers Agentforce AI Agents to make smarter, more reliable business decisions with a single source of truth

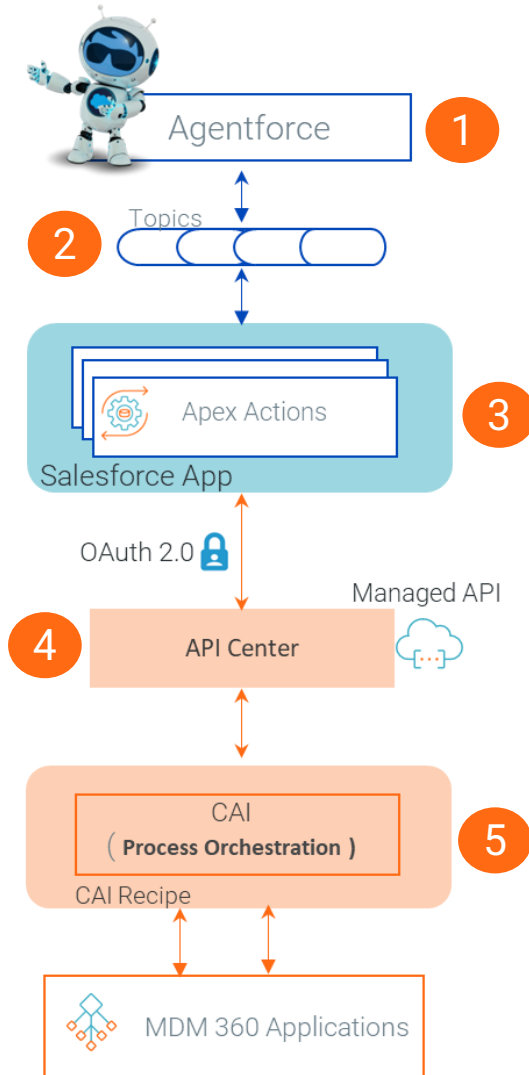
# INFORMATION MDM EXTENSION FOR AGENTFORCE

## ARCHITECTURE

- ✓ Information MDM Extension for Agentforce : Pre-built agent actions, named credential and permissions set and custom label for Apex
- ✓ MDM data tools for AI Agent: Leverages REST APIs to seamlessly connect AI Agents with MDM SAAS



# Solution Approach



## Solution

1. Salesforce's Intelligent systems capable of understanding natural language and performing tasks
2. Define the scope and context of what an agent can do. Contains Classification Description, Scope and Instructions
3. The actual tasks an Agentforce agent performs within a topic. Tools that agents use to execute an action or to fetch information from Salesforce data or external systems
4. The API Center serves as the centralized platform for managing APIs published via CAI Recipe. OAuth 2.0 authorization is used to establish secure, token-based authentication and delegated access between Apex Actions within Salesforce and the IDMC-managed APIs
5. IDMC CAI platform is used as composable layer which interact with MDM 360 applications via public API(s)

# Extension Assets

## A list of Out of the box Agentforce actions

- List of 6 actions to retrieve customer & product records including relationships from Informatica Customer 360 and Product 360
- Agentforce actions that can be customized to retrieve golden records from other data domains based on the user request

← Agentforce Builder Sales Development Agent Version 1

# Topics

← Topic Details

Topic Configuration This Topic's Actions

Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated. New

Search actions...

6 items • Sorted by Agent Action Label(asc)

Agent Action Label ↑	Description	Source	Refere...
Search Product Records from Informatica Product 360	Searches for records in Informatica Product 360 and r...	Custom	Apex
Get Product Details from Informatica Product 360	Retrieves additional details about a selected product b...	Custom	Apex
Get Product Relationships from Informatica Product 360	Retrieves relationship data of a product based on the ...	Custom	Apex
Get Customer Profile from Informatica Customer 360	Retrieves additional details about a selected customer...	Custom	Apex
Get Customer Relationships from Informatica Customer 360	Retrieves relationship data of a selected customer bas...	Custom	Apex
Identify Customer Records from Informatica Customer 360	Searches for records in Informatica Customer 360 and...	Custom	Apex

## Pre-configured Informatica CAI Recipes

- A list of 6 Informatica Cloud Application Integration (CAI) processes to retrieve master data in MDM
- An MDM Service Connector and an App Connection to connect and retrieve data from MDM Public APIs

Informatica Application Integration Extns-Dev10

Explore All Projects Default MDM Data Tools for AI Agents

MDM Data Tools for AI Agents (8)

Name	Type	Updated On	Description	Tags	Status	Published
Get Customer Record Details	Process	Sep 30, 2025, 1:09 AM	Process that uses all required inputs to retrieve additional customer record details f...	Agentforce	Valid	Published
Get Customer Relationships	Process	Sep 30, 2025, 1:07 AM	Process that uses all required inputs to retrieve all relationships associated with a c...	Agentforce	Valid	Published
Get Product Record Details	Process	Sep 30, 2025, 1:09 AM	Process that uses all required inputs to retrieve additional product record details fr...	Agentforce	Valid	Published
Get Product Relationships	Process	Sep 30, 2025, 1:07 AM	Process that uses all required inputs to retrieve all relationships associated with a p...	Agentforce	Valid	Published
Identify Customers	Process	Sep 30, 2025, 4:05 AM	Process that uses all required inputs to match & identify customer records within Inf...	Agentforce	Valid	Published
MDM Connector	Service Connector	Sep 29, 2025, 4:13 AM	Service connector that retrieves data from MDM APIs	Agentforce	Valid	Published
MDMConnection	App Connection	Sep 29, 2025, 4:14 AM	App connection that retrieves data from MDM APIs	Agentforce	Valid	Published
Search Products	Process	Sep 30, 2025, 1:06 AM	Process that uses all required inputs to search for and retrieve a list of matching pr...	Agentforce	Valid	Published

# Agentforce Actions

Employee, SDR, Service and Personal Shopper Agents

Actions	Parameters	Acceptance Criteria
Identify Customer	Match Fields (Name, Phone Number, Email, Identifier, Address)	<ul style="list-style-type: none"> <li>Support identification by any combination of <b>Name, Phone Number, Email, Address</b> or <b>Identifier (Tax ID)</b></li> <li>Returns a list of up to <b>5 customers</b>, across both <b>Person &amp; Organization</b> entity types, ranked by <b>match score</b></li> <li>Each search result includes the <b>MDM Business ID, Entity Type</b> and all default searchable fields</li> </ul>
Get Customer Profile	MDM Business ID	<ul style="list-style-type: none"> <li>Retrieves a comprehensive, enriched golden profile for a single identified customer record (Person or Organization) using the mandatory <b>MDM Business ID</b></li> </ul>
Get Customer Relationships	MDM Business ID	<ul style="list-style-type: none"> <li>For Person, returns <b>household/family relationships</b>.</li> <li>For Organization, returns <b>corporate hierarchy</b> and <b>key contacts</b></li> <li>Includes relationship type &amp; a related entity record summary in a simple JSON structure</li> </ul>
Search Product(s)	Product Identifier/GTIN Product Description Product Brand	<ul style="list-style-type: none"> <li>Supports <b>flexible product search</b> by any combination of the input fields</li> <li>Returns a concise list of up to <b>5 matching products</b>, ranked by <b>match score</b>, with essential details for initial review</li> </ul>
Get Product Specifications	MDM Business ID	<ul style="list-style-type: none"> <li>Provides a rich set of product attributes for a single golden product record</li> <li>Supports product lookup using either the <b>GTIN</b> or the <b>MDM Business ID</b></li> </ul>
Get Related Products	MDM Business ID	<ul style="list-style-type: none"> <li>Must retrieve a list of products related to a given product.</li> <li>Input must include the <b>MDM Business ID</b> and a <b>Configurable Relationship Type</b>.</li> <li>Output must be a list of related products, each with its basic product details.</li> </ul>

# CAI Processes and MDM APIs

List of CAI processes and MDM public APIs mapped to each of the Agentforce actions

Actions	CAI Processes	MDM APIs Used
Identify Customer	Agentforce Identify Customers	Search Match API
Search Product(s)	Agentforce Identify Products	Search API
Get Customer Profile	Agentforce Get Customer Record Details	Read Master Record by Business ID
Get Product Specifications	Agentforce Get Product Record Details	
Get Customer Relationships	Agentforce Get Customer Relationships	Related Entities API
Get Related Products	Agentforce Get Product Relationships	

# Transformational Use Cases

## Product Installation Scheduling - Service Agent

### Challenge:

Automate the scheduling of B2B service appointments for a complex enterprise.

### Solution:

A dynamic service agent that orchestrates a series of intelligent actions to solve the customer's problem.

### MDM in Action:

When a local search fails, the agent uses an MDM action to find the customer record, get relationships, & retrieve all associated order and location details.

### Value:

Seamless, intelligent B2B customer service, even with fragmented data.

## From Manual Chaos to Automated Excellence - SDR Agent

### Challenge:

Automate the manual, time-consuming lead qualification process.

### Solution:

An SDR agent that handles inbound inquiries from start to finish.

### MDM in Action:

The agent uses MDM actions to look up and verify customer data, identify existing records, and prevent the creation of duplicate leads.

### Value:

Instant, personalized responses to new inquiries and a streamlined sales funnel, saving time and improving data quality.

## Finding the Perfect Gift - Personal Shopper Agent

### Challenge:

Provide personalized gift recommendations to customers.

### Solution:

An AI agent that understands customer requests and preferences.

### MDM in Action:

The agent uses MDM actions to retrieve customer profiles, demographics, and family relationships to find the ideal gift and identify upsell opportunities.

### Value:

Increased customer loyalty and higher sales through hyper-personalized suggestions.

## Increased Life Insurance - Upsell Agent

### Challenge:

Proactively identify and act on cross-sell and upsell opportunities.

### Solution:

An autonomous AI agent that monitors client records for significant life events.

### MDM in Action:

The agent uses an MDM action to retrieve the complete household financial picture and risk profile, identifying opportunities for increased life insurance and other products.

### Value:

Automated opportunity creation and proactive outreach to clients, ensuring no opportunity is missed.

# Questions ?

Kamal Abrol – Architect, Customer Success

Aishwarya A - Architect, Customer Success

Where data & AI come to **LIFE**

# References

- <https://democentral.informatica.com/demo-central/d/d1542b3f-569f-41e8-8473-870faaca46ea>
- [Understanding the Atlas Reasoning Engine Workflow](#)