



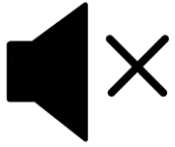
14 Apr, 2026

Powering Agentforce: The IDMC Trusted Context Engine

- Kamal Abrol, Senior Success Architect

Where data & AI come to LIFE™

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

Disclaimer: The information being provided herein is for informational purposes only. The development, release and timing of any Informatica product, service or functionality described herein remain at the sole discretion of Informatica and should not be relied upon in making a purchasing decision. Statements made herein are based on information currently available, which is subject to change. Such statements should not be relied upon as a representation, warranty or commitment to deliver specific products, services or functionality in the future.

14 Apr, 2026

Powering Agentforce: The IDMC Trusted Context Engine

Where data & AI come to 



Kamal Abrol

MDM-SaaS 360 Architect

Customer Success

Agenda

1

Contextualizing AI

2

Agentforce Solution

3

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

4

Powering Agentforce with
Hierarchy Intelligence

5

Agentforce + MDM Usecase
across Verticals

6

MDM Extension
for Agentforce-
CAI processes+ API

Contextualizing AI: Empowering Agentforce with trusted context and memory

How Salesforce + Informatica Give AI the Context It Needs?



Unified "Golden Records"



Reduced Hallucinations



Contextual Accuracy



Don't let your AI guess.



Power Agentforce with Informatica MDM to deliver accurate, trustworthy AI experiences that drive business value

Agent force Fundamentals-RECAP

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.

Example Agent:

- Sales Agent
- Service Agent
- Personal Shopper Agent

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)

Example Topic:

- Sales Agent
- Lead Qualification
 - Product Inquiry

Actions

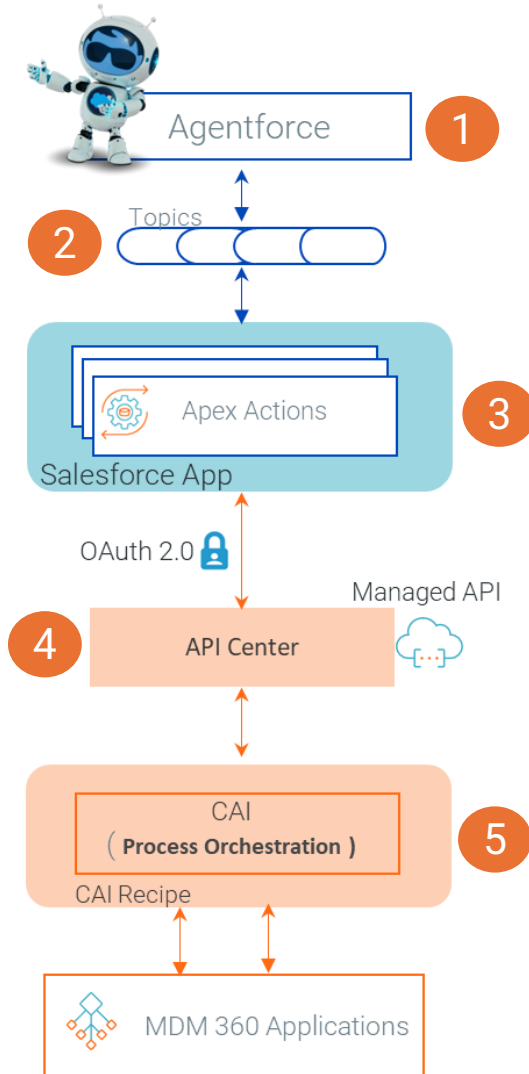
Specific Tasks: The actual tasks an Agentforce agent performs within a topic

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

Example Action:

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

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)

DEMO



MDM for AI

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

Powering Agentforce with Hierarchy Intelligence

GOAL: Make Agents "Organizationally Aware"

Optimized Lead Routing & Account Ownership

The Problem: When a lead comes in from "**Wing**," Agentforce treats it as a standalone SMB lead. It routes it to a mid-market rep, ignoring its lineage.

The Solution: Agentforce instantly identifies **Wing** as a subsidiary of **Google LLC/Alphabet**.

Benefit: The agent automatically routes the lead to the **Global Strategic Account Manager**, preventing "account poaching" and ensuring a unified sales strategy + Strategic Upsell.

Enhanced White-Space Analysis (Cross-Selling)

•**The Problem:** Standard agents only see data on a single account record, missing connections to "sibling" companies that might already be customers.

•**The Solution:** MDM allows agents to query complex sibling subsidiary relationships.

•**Benefit:** Agents can proactively suggest **enterprise-level upgrades** based on a sibling's usage, transforming a basic service bot into a proactive revenue generator.

Capability	Standard CRM Without Informatica MDM Hierarchy	With Agentforce + Informatica MDM Hierarchy
Parent/Child Vision	Agent only sees data (contacts, leads, orders) attached to the open account record .	Agent sees activity across the entire organizational tree , including parent entities and all subsidiaries.
Sibling Recognition	Agent treats "Company A - India" and "Company A - UK" as unrelated strangers .	Agent identifies them as sibling subsidiaries under the same global parent, allowing for consolidated service or sales.
Lead Routing	A lead from a subsidiary might be treated as a small "new lead" and sent to a local rep.	Agent recognizes the Parent relationship and routes the lead to the Global Account Manager for that "Golden Record".
Risk & Compliance	Agent might approve a new order for a subsidiary while unaware the Parent company is on credit hold.	Agent rolls up financial health across the entire hierarchy to enforce global credit or compliance policies.

Agentforce SDR Agent in action

Trigger The Inbound Email

From: Mark Johnson (markj.crestwoodcorp@gmail.com)

Company: Crestwood Corporation, 123 Business Ave

Subject: New Product Inquiry

"Hi, I'm interested in learning about your latest security software solutions..."

Step 1 MDM Lookup & Verification

Agent Action

- Parse company information from email
- Query MDM using “**Identify Customer**” action
- Confirm “Crestwood Corporation” = existing customer

Result

- ✓ Existing customer and contact identified in seconds & automates lead qualification

Step 2 Direct Opportunity Creation

Agent Action

- Automate entire lead qualification funnel
- Create new Contact record (if not found) for Mark & link to existing Account
- Generate Opportunity record instantly

Result

- ✓ Complete CRM setup in one efficient step. No duplicate lead records created.

Step 3 Intelligent Assignment & Response

Agent Action

- Find dedicated account manager & assign opportunity automatically
- Query MDM using “**Search Product (s)**” to get the product details
- Creates a draft email for the opportunity owner to review & send

Result

- ✓ Mark receives immediate, personalized response acknowledging existing relationship.

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.

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

CAI Processes and MDM APIs

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

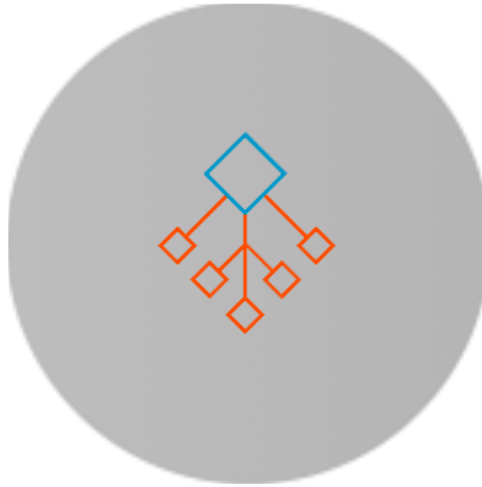
Actions	CAI Processes	MDM APIs Used
Identify Customer	Agentforce Identify Customers	Search Match API
Search Product(s)	Agentforce Identify Products	Search API
Get Customer Profile	Agentforce Get Customer Record Details	Read Master Record by Business ID
Get Product Specifications	Agentforce Get Product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

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

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

The screenshot shows the 'Agentforce Builder' interface for the 'Sales Development Agent' (Version 1). The main content area is titled 'Topic Details' and shows the 'This Topic's Actions' tab. A message states: 'Manage the actions assigned to your topic. To add or remove actions, your agent must be deactivated.' Below this is a search bar for actions and a table listing 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

The screenshot shows the Informatica Application Integration interface. The left sidebar contains navigation options: New..., Home, Explore, My Processes, My Import/Export Logs, Configure Guides, and Recipes. The main content area displays a table of '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



Questions ?

Kamal Abrol – 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](#)