



tote

Every store, agent-buyable.

Tote is making the commercial web **transactable by AI agents**, starting with the millions of stores that already speak a common language. It finds the stores, proves each one works by putting a real item in a real cart, and hands the agent five tools that end at a checkout link a human clicks to pay. No work from the merchant, ever.

For developers building AI assistants, and for the people who shop through them.

PRE-SEED · CONFIDENTIAL · ISHAAN SAMANTRAY · ZARIA NAQVI · USETOTE.DEV



Every AI shopping conversation dies at the same moment.

My girlfriend does all her online shopping through Claude. She asks it what to buy, it helps her decide, and then **it stops**. It cannot check whether the thing is in stock, what it actually costs today, or put it in a cart.

So she opens a browser, searches the product again, finds the store, and starts over. **She does the research in Claude and the buying somewhere else.** Half the time she never finishes.

I watched that happen enough times to realize the assistant isn't missing intelligence. **It is missing hands.**

WHAT AN ASSISTANT CAN DO TODAY

- ✓ Recommend a product
- ✓ Compare specs it remembers
- ✓ Describe where you might buy it

WHAT IT CANNOT DO

- × Know today's price
- × Know if it is in stock
- × Put it in a cart
- × Get you to checkout

This is not a niche. It is every product conversation, in every assistant, for every one of the hundreds of millions of people now asking an AI what to buy.



The buying moment moved into the chat. The rails only got built for one chat.

2024 → 2025

Agents got hands

MCP standardized how assistants call outside tools. Claude, Cursor, and every major client speak it. Connecting an assistant to a service stopped being a custom integration.

SEPT 2025

OpenAI shipped checkout

Instant Checkout launched with Stripe and Etsy. The largest AI company decided buying inside the chat was the product. Demand confirmed by the incumbent.

FEB 2026

Supply went agentic

Shopify flipped 1M+ merchants into OpenAI's protocol; PayPal joined. Merchants stopped being the blocker. The head of the market is wired.

NOW

Everyone else has nothing

OpenAI retired in-chat checkout in March 2026 for a buy-on-site handoff to eight enrolled retailers, inside ChatGPT only. Claude, Perplexity, Cursor and every assistant startup have **zero** commerce. So do millions of stores off the protocol.

The window is the gap between "buying in chat is now normal" and "every assistant has a way to do it." That gap is open today and it closes once someone neutral fills it.



Tote gives any assistant the ability to actually buy things.

A user says "I'm running low on coffee." Their assistant searches real stores, reads live prices and stock, builds a real cart, and hands back a checkout link. The user clicks it and pays on the store's own site. **One line of setup. No work from the merchant. Tote never touches payment.**

01 · FIND

Real stores

Search an index of stores proven to work, ranked by what people actually buy through them.

02 · READ

Live prices

Today's price, today's stock, real variants. Read from the store at the moment of asking.

03 · CART

A real cart

Items go into an actual cart at the actual store, across multiple items and multiple stores.

04 · HAND OFF

Checkout link

A real checkout the human completes. We never see a card, so there is nothing to breach.

For the user: the conversation finishes instead of sending them to a browser.

For the developer: commerce in one install, not a year of merchant deals.

For the merchant: agent customers, no integration, checkout stays on their site.



This is a real cart at a real store, built inside Claude.

– in a normal Claude conversation –

> restock my coffee and grab a grinder

`tote.search_stores` (coffee) 9ms

↳ 3 verified stores · ranked by real usage

`tote.list_products` (deathwishcoffee.com) 507ms

`tote.add_to_cart` (Pumpkin Chai × 2) 1928ms

Pumpkin Chai Coffee × 2 \$27.98

Power Surge Pods, 20ct \$29.98

cart total \$57.96 USD

CHECKOUT · YOU PAY ON THEIR SITE

deathwishcoffee.com/cart/42123927486519:1,41181425631287:1

Actual session. The link opens Death Wish Coffee's own checkout with both items and the correct total.

Five tools, two surfaces

`search_stores` · `list_products` · `get_product` · `add_to_cart` · `checkout_url`. Available over MCP (Claude, Cursor, any client) and plain REST. Setup is one line.

It triggers on normal speech

73 natural shopping phrases route in: "running low on", "my headphones broke", "gift for my mom", "what should I get". **The user never says the word Tote.**

Unknown stores work instantly

Ask for a store we have never seen and Tote verifies it live in about 7 seconds, then serves it. Brandy Melville went from unknown to shoppable in 5.6s.



Anyone can list stores. We prove they actually work.

Before any store enters the index, Tote **adds a real item to a real cart, reads the cart back, and checks the price charged matches the price listed.** Stores that fail are flagged, not served. A listing is a claim; a completed cart is proof.

This is the unglamorous part, and it is where the real engineering is. Three findings that cost days and are not in any documentation:

47% of stores redirect their cart endpoints to a primary domain while serving the catalog elsewhere. Cookies do not follow, so the cart silently reads empty. This one bug looked like 126 broken stores.

Catalogs lie about stock. Stores report an item available, then reject it at the cart. Only the read-back tells the truth.

One store charged \$23.00 for a \$4.99 listing. The price check caught it and refused to serve the store.

THE COMPOUNDING PART

Every call makes the index better.

Each search, cart, and checkout re-ranks the map: stores that actually convert rise, stores that break fall. A competitor can copy the crawler in a month. They cannot copy the usage, because usage only exists downstream of being the thing agents already call.

The asset is not the code. It is the verified list plus the record of what worked.

24/7

re-verified, so the index cannot rot

0

merchant integrations required

0

payment data we ever touch



Built and running. Not yet used by anyone but us.

2,504

stores verified end to end, each proven with a real cart

242,442

products indexed, live prices read at the moment of asking

2

platforms live (Shopify, WooCommerce) plus a marketplace adapter

67,901

verification probes run, the raw material the ranking compounds on

WHAT IS PROVEN

- The full loop works in a normal Claude tab: real cart, real checkout, correct total.
- ~85% of live-probed stores pass verification on clean batches.
- Unknown stores onboard in about 7 seconds, with no merchant involvement.
- Two platforms and a marketplace adapter run on one interface.
- Discovery and verification run continuously without supervision.

WHAT IS NOT PROVEN

- **Zero external users.** Every call in that ledger is our own testing.
- **No retention data**, because there is no cohort yet.
- **No revenue.** GMV handed to checkout is instrumented live (gmw_handed_usd); it reads \$0 today.
- The x402 seller rail is built and running dark; no wallet has paid it yet.

Next 30 days: onboard the first 100 users, hand the first real GMV to checkout, and produce the retention curve this slide is missing.

Every number above is a query against a live ledger, not an estimate. The system was built over one weekend in August 2026.



We earn a few cents every time an agent finishes a purchase.

WHO HAS THIS PROBLEM

Two customers, counted separately.

Developers: roughly **40,000** teams building AI assistants and agents today (MCP server authors, AI app startups, agent frameworks). Each needs commerce and none will build it.

Consumers: **~800M** weekly users across ChatGPT, Claude, Gemini and Perplexity. Conservatively **5%** ask about buying something in a given month = **40M** shoppers.

WHAT WE MAKE PER UNIT

Affiliate: average agent basket **\$60**, blended commission **4%** = **\$2.40** per completed purchase.

API: paid tiers at **\$99/mo** for teams past the free volume.

Merchant services: **\$50/mo** for agent analytics and a verified badge, once we send stores real traffic.

THE MATH

If **2%** of those 40M shoppers buy through an agent monthly, at **1.5** purchases each:

\$2.3B/yr

routed commission opportunity, affiliate line alone

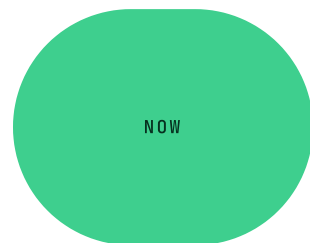
Add 4,000 paying developer teams (\$4.8M/yr) and 20,000 merchants (\$12M/yr) and the serviceable near-term line is **tens of millions** without touching the transaction-fee endgame.

Why the denominator grows: retail sites measured AI-referred traffic up more than 10x through the 2025 holidays, converting better than social. The behavior is not hypothetical; it is already showing up in merchant analytics.

The honest bound: these are our assumptions, not observed conversion. The first 100 users replace the 2% guess with a measured number, which is exactly what this raise buys.



Three payers, in order of arrival.



Agent platforms and developers: metered API keys, plus x402 per-call USDC micropayments on a seller rail that is built and running dark. They pay because renting a verified index is cheaper than operating one; verification is a full-time machine (canonical domains, throttle maps, freshness) and we run it once for everyone. The comparable is Plaid charging per bank connection. → funds the early company



Merchants: affiliate commission on handed-off checkouts (2–8% industry standard) maturing into direct agent-channel deals, plus subscriptions for demand analytics only Tote sees, such as what agents tried to buy and could not find. GMV handed to checkout is instrumented live (gmw_handed_usd), the number that turns this from pitch into arithmetic. Ranking is never for sale. → proves stores pay

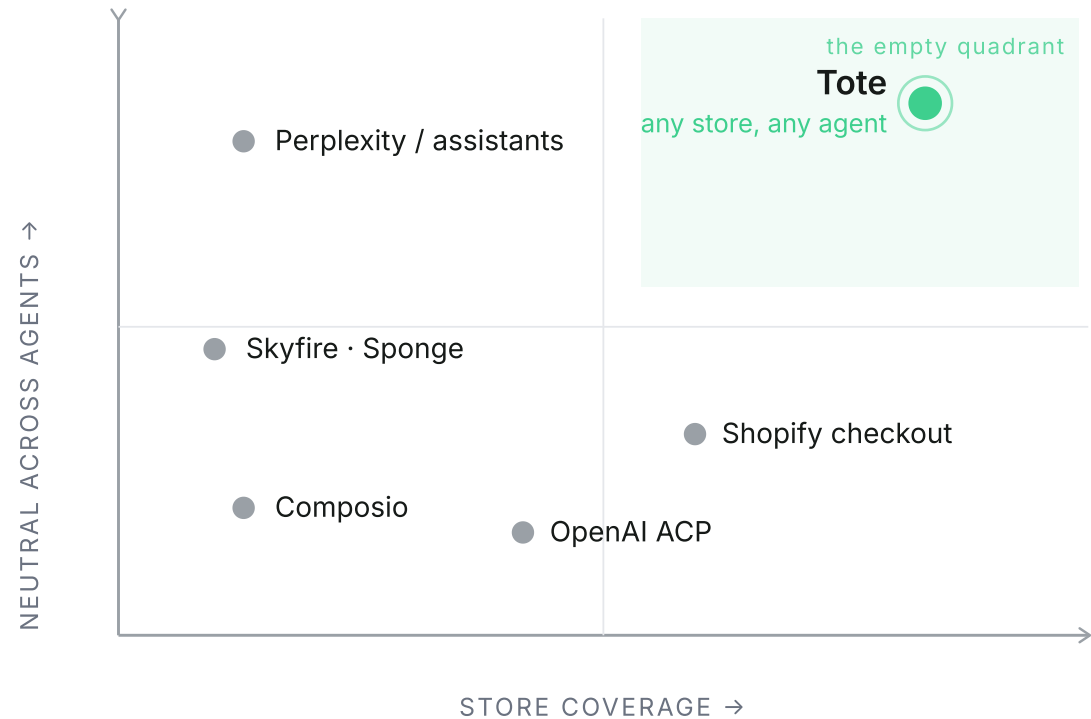


Agents themselves: autonomous agents with wallets paying x402 micropayments per call, no contract, no signup. The rail exists in the product today, a first of its kind. → the venture-scale outcome

The scenarios, not promises: McKinsey puts agentic commerce at \$3–5T by 2030, and access layers historically take 1–3% of the flow they enable. Routing \$3–4B GMV at a 3% blended take is ~\$100M ARR; the pure-API road, 1B verified-commerce calls a month at Plaid-like pricing, is ~\$60M ARR. Two roads, one wedge feeding both.



Everyone covers one chat or one catalog. Nobody is neutral across both.



OpenAI

Ran the in-chat checkout experiment with Stripe and enrolled merchants, measured it converting **roughly 3x worse than a click-through to the merchant** (Walmart's own data), and retired it in March 2026 for a discover-in-AI, buy-on-site handoff to eight big-box retailers.

Shopify

Agentic checkout across its merchant base. **Covers its own stores, and hands distribution to whoever owns the agent surface.**

Skyfire · Sponge

Agent wallets and payment rails with real capital. **They move money; they do not know which store has the item.** Complements, not competitors.

Composio · Zero

Tool discovery and integration routing. **No live verification, no cart, no commerce specificity.**

Scrapers

Bright Data, Apify, Firecrawl extract from any site. **Generic data tools; nothing verifies a cart or ends at a checkout.**

The market has converged on Tote's architecture: in-chat buying was tested and retired; the handoff won. The game is now what gets handed off at the boundary: OpenAI passes a product link to eight enrolled retailers; Tote passes a filled cart, one click from payment, on any of 2,500+ verified stores with no merchant enrollment. Deeper handoff, broader coverage, same trust model the industry just validated. The honest risk stays: a model vendor ships this natively. Neutrality is the structural defense, the same reason DNS is not run by one ISP.



Show the failure, then the fix.

The channel is **demo video, posted daily**. Not SEO, not paid ads, not "partnerships." One format, repeated: the same shopping request twice, side by side.

Left: Claude alone. "Here are some options you might like." Dead end.

Right: Claude with Tote. Live prices, a real cart, a checkout link. Done in 12 seconds.

That contrast **is** the pitch. Nobody installs a shopping tool on a random Tuesday; they install it the moment they watch their assistant fail at something they just tried.

Why this channel and not another: the product is visual, the moment is universal, and distribution is free. Every video ends with one pasteable line, so **watching and installing are the same action**.

THE FUNNEL, CONCRETELY

1 video/day across TikTok, Reels, Shorts, X.

~1 in 20 breaks out; that is the volume game, not a hope.

One breakout ≈ 50k views → ~500 link taps → ~100 installs at a 20% paste-through rate.

Install = 2 minutes, no account, no card.

FIRST 100 USERS, SPECIFICALLY

Cornell and NYU move-in week is happening now. Dorm shopping is a list-based, deadline-driven purchase, and I am on campus with the exact demographic. **Ten friends this week, their group chats next.**

THEN IT COMPOUNDS

Directory listing in Anthropic's connector catalog turns install into one click. And every AI app that integrates the API brings its whole user base without them ever hearing our name. **B2B2C is the scale channel; video is how we earn the right to it.**



We build agent infrastructure, and we have the problem we are solving.

Ishaan Samantray

CO-FOUNDER

Shipped this entire system in a weekend. Crawler, live verifier, index, MCP server, REST API, and the site: 2,504 verified stores and a working checkout, built and deployed solo.

Engineering at Cornell, currently interning at **ion**, a YC company, working on production agent tooling.

31 merged pull requests into the agent stack itself: LanceDB, Sentry, Cohere, and Pydantic. I contribute to the frameworks this runs on.

Founded Kids For Code, a nonprofit that has taught programming to **10,000+ students**. I have built an organization from zero before.

I live the problem. I watched the person closest to me abandon carts in Claude for months. This company started as a fix for that, not a market map.

Zaria Naqvi

CO-FOUNDER

Harvard University, Computer Science + Economics.

THE UNFAIR ADVANTAGE

Making stores agent-buyable is not one insight; it is a hundred small undocumented ones (cart redirects, lying catalogs, per-IP throttles, nonce handshakes). **Those are already paid for, and they are in the code.** A competitor starts that clock at zero.

FIRST HIRE

First hire with this raise is a founding engineer for distributed verification, so the index can grow from thousands of stores to millions.

Advisors: founders at ion (YC) and Roam, whose crawl data seeded the first index.



\$500K pre-seed for 18 months to turn a working index into a used one.

USE OF FUNDS

- 50% — founding engineer, distributed verification
- 25% — infrastructure to probe millions of stores
- 15% — distribution: video, directory, developer relations
- 10% — legal and operations

MILESTONES THIS BUYS

- 10,000 agent users actively shopping
- 100,000+ verified stores across four platforms
- First affiliate revenue, with measured basket and conversion
- A real retention curve, the one number missing today

WHAT THAT UNLOCKS

Those milestones are exactly the evidence a Series A needs, and the same evidence that turns a platform conversation from a cold email into an inbound one. **We are not asking for money to find out whether it works. It works. We are asking for the runway to be the one that gets used.**

Commerce is moving into the conversation.

OpenAI proved the demand and built the rails for one chat. Every other assistant, and every store off that protocol, still has nothing. Tote is the neutral layer, live today, that gets better every time someone uses it.

CONTACT

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