

Salesforce Project Documentation

TOPIC:

AI-Powered Sales Forecasting

Problem Statement:

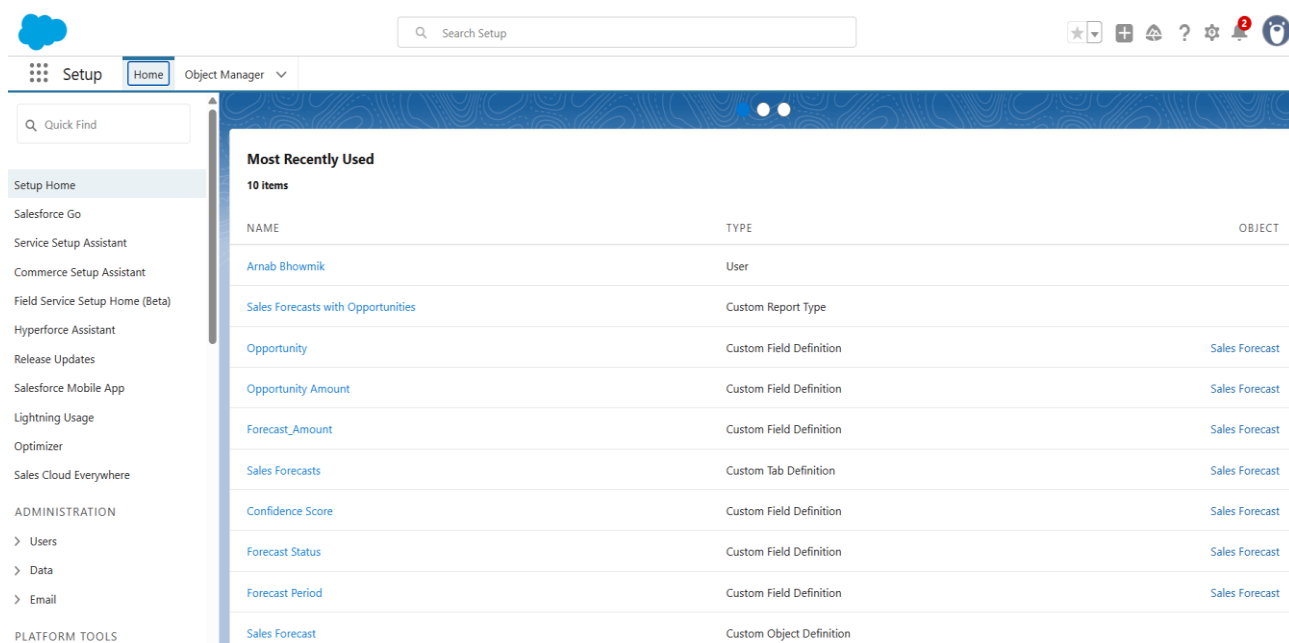
A technology company is struggling with inaccurate sales forecasting due to inconsistent pipeline management, manual processes, and lack of predictive insights. This leads to misallocated resources, missed revenue targets, and a lack of proactive decision-making, resulting in inefficiencies across sales operations. The company needs an AI-driven solution to automate, enhance, and improve the accuracy of its sales forecasts to optimize sales strategies and resource allocation.

Phase 1: Problem Understanding & Industry Analysis (Requirement Gathering)


- Identified the core problem: inaccurate sales forecasting caused by manual processes.
- Documented inefficiencies like missed revenue targets and resource misallocation.
- Set project objective: build an automated forecasting solution inside Salesforce.
- Outlined scope: rule-based scoring, flows, reports, and dashboards.
- Chose Salesforce Developer Playground as the environment.
- Planned timeline to build a working project in less than 10 days.
- Defined roles: Admin (configuration) and Developer (customization).
- Prioritized deliverables to keep the build lean and achievable.

Phase 2: Org Setup & Configuration

- Created a Salesforce Playground environment.
- Configured basic org settings like currency, fiscal year, and locale.
- Verified user permissions to allow creating objects, fields, flows, and reports.
- Enabled access to App Launcher and navigation tabs for easier testing.
- Added required profiles and ensured visibility of new fields to users.
- Organized workspace by grouping related items under a Sales app.
- Screenshot Placeholders:
- Developer Org Home



- Company Information / Settings page

 **SETUP**

Company Information

Company Information

Gyan Ganga Institute of Technology and Sciences

The organization's profile is below.

User Licenses [10+]

 |

Permission Set Licenses [10+]


 |

Organization Detail

Edit

Organization Name	Gyan Ganga Institute of Technology and Sciences
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Created By OrgFarm EPIC, 9/8/2025, 3:55 PM

 **SETUP**

Company Information

User Licenses

User Licenses Help ?

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	2	2	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	6	0	6	
Customer Community Login	Active	5	0	5	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	10	0	10	
Identity	Active	110	0	110	

Show 10 more » | Go to list (25) »

Permission Set Licenses

Permission Set Licenses Help ?

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations	Custom Permission Set License
Agent platform builder	Active	5	0	5		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce (Default)	Active	5	1	4		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce Service Agent Builder	Active	10,000	1	9,999		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce Service Agent User	Active	200	0	200		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Builder	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Explorer	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>

- User Profiles / Permission setup

The screenshot displays the Salesforce Setup interface for user profiles. The top navigation bar includes a 'SETUP' link and a 'Profiles' header. The main content area shows two profiles: 'System Administrator' and 'Standard User'. Each profile page includes a 'Profile Detail' section with a table of attributes and a list of enabled permissions.

System Administrator Profile Detail:

Attribute	Value
Name	System Administrator
User License	Salesforce
Created By	salesforce.com, inc., 9/8/2025, 3:55 PM
Modified By	Arnab.Bhowmik, 9/11/2025, 2:52 AM

Standard User Profile Detail:

Attribute	Value
Name	Standard User
User License	Salesforce
Created By	salesforce.com, inc., 9/8/2025, 3:55 PM
Modified By	Arnab.Bhowmik, 9/11/2025, 2:52 AM

- Navigation bar with Sales Forecasts tab added

The screenshot shows the Salesforce Seller Home dashboard. The navigation bar at the top includes a search bar and a list of tabs: Sales, Sales Forecasts, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area displays several widgets for sales performance and activity tracking.

Seller Home Widgets:

- Close Deals:** Opportunities owned by me and closing this quarter. Total Pipeline: \$0. Status: 0 Open, 0 Won, 0 Lost.
- Plan My Accounts:** Accounts owned by me. Status: 0 Upcoming Activity, 0 Past Activity, 0 No Activity.
- Grow Relationships:** Contacts owned by me and created in the last 90 days. Status: 0 Upcoming Activity, 0 Past Activity, 0 No Activity.
- Build Pipeline:** Leads owned by me and created in the last 30 days. Status: 0 Upcoming Activity.
- My Goals:** Set personal weekly or monthly goals for emails, calls, and meetings.
- Today's Events:** A calendar view of upcoming events.

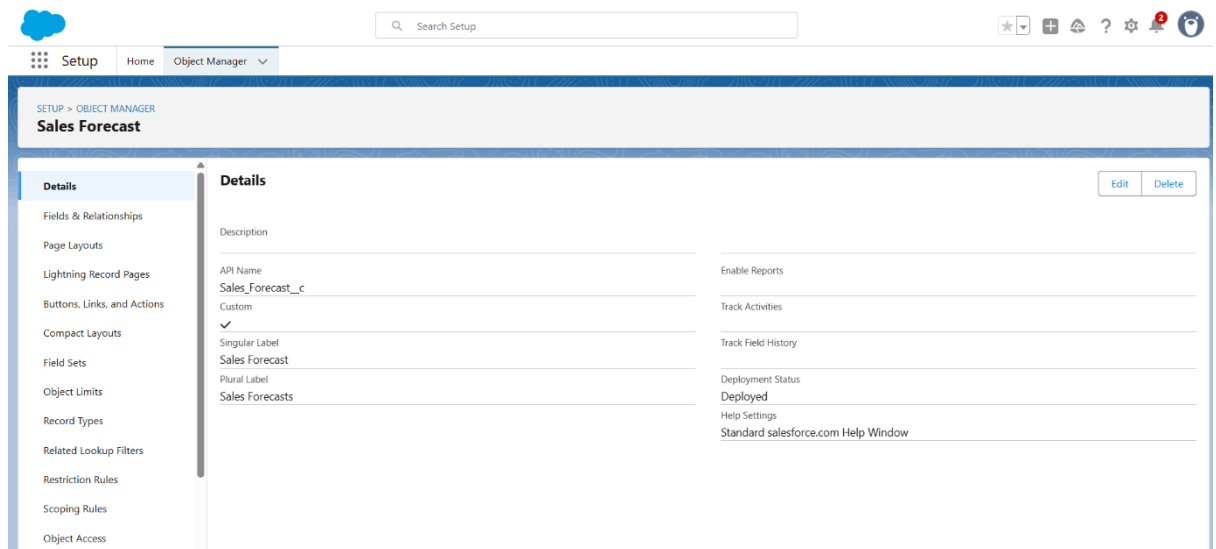
Phase 3: Data Modeling & Relationships

- Created custom object **Sales_Forecast__c** with fields:
- Forecast Amount (Currency)
- Forecast Period (Date)
- Forecast Status (Picklist: Draft, Approved, Closed)
- Confidence Score (Percent)
- Opportunity (Lookup to Opportunity)
- Added a custom tab for Sales Forecasts to make them accessible.
- Built relationships so Sales Forecasts are directly tied to Opportunities.
- Defined formula fields on Opportunity:
- **Score__c** (rule-based probability by stage)
- **Weighted_Amount__c** (Amount × Score%)
- Ensured data consistency by making key fields required.
- Sales Forecast Object Manager overview

The screenshot displays the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is on the right. Below the navigation bar, the 'Object Manager' section is active, showing a list of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One object is listed: 'Sales Forecast' with API name 'Sales_Forecast__c' and type 'Custom Object'. The 'LAST MODIFIED' date is '9/11/2025' and it is 'DEPLOYED' (indicated by a checkmark). The interface also includes a 'Schema Builder' button and a 'Create' dropdown menu.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Sales Forecast	Sales_Forecast__c	Custom Object		9/11/2025	✓

- Details page

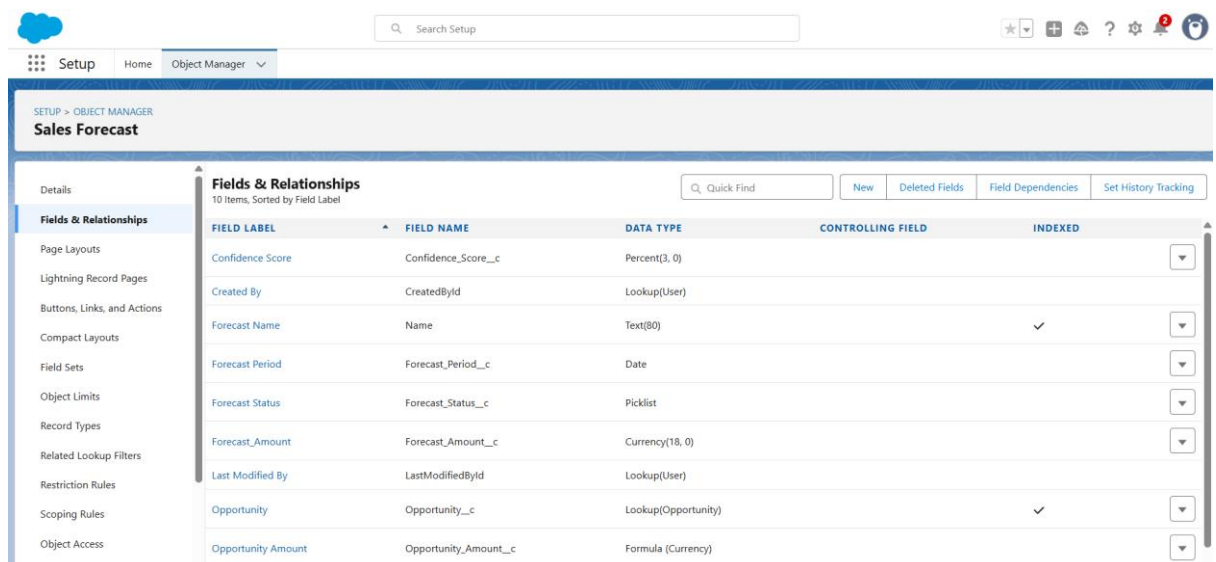


The screenshot shows the Salesforce Setup interface for the 'Sales Forecast' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The 'Details' tab is selected, displaying a form with the following fields:

- Description
- API Name: Sales_Forecast__c
- Custom: Custom
- Singular Label: Sales Forecast
- Plural Label: Sales Forecasts
- Enable Reports
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

- List of custom fields for Sales Forecast



The screenshot shows the Salesforce Setup interface for the 'Sales Forecast' object, with the 'Fields & Relationships' tab selected. The left sidebar is the same as in the previous screenshot. The main content area displays a table of 10 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table is filtered by 'Quick Find'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Confidence Score	Confidence_Score__c	Percent(3, 0)		
Created By	CreatedById	Lookup(User)		
Forecast Name	Name	Text(80)		✓
Forecast Period	Forecast_Period__c	Date		
Forecast Status	Forecast_Status__c	Picklist		
Forecast Amount	Forecast_Amount__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Opportunity	Opportunity__c	Lookup(Opportunity)		✓
Opportunity Amount	Opportunity_Amount__c	Formula (Currency)		

Buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are located in the top right corner of the table section.

- Formula field setup for Score__c

The screenshot shows the 'Edit Opportunity Custom Field' page for the 'Scorec' field. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Screening Rules. The main content area is titled 'Custom Field Definition Edit' and includes a 'Field Information' section with the following fields: Field Label (Scorec), Field Name (Scorec), Description, Help Text, Data Owner (User), Field Usage (-None-), Data Sensitivity Level (-None-), and Compliance Categorization. The Compliance Categorization section shows a list of categories: Available (PII, HIPAA, GDPR, PCI) and Chosen.

The screenshot shows the 'Formula Options' page for the 'Scorec' field. The left sidebar is the same as the previous screenshot. The main content area is titled 'Formula Options' and includes a 'Formula Return Type' dropdown set to 'Percent' and a 'Decimal Places' dropdown set to '2'. Below this is a 'Simple Formula' tab and an 'Advanced Formula' tab. The 'Simple Formula' tab is selected, and the formula is displayed as: `Scorec (Percent) = CASE (StageName, "Prospecting", 10, "Qualification", 25, "Needs Analysis", 35, "Value Proposition", 45, "Id. Decision Makers", 55, "Perception Analysis", 65, "Proposal/Price Quote", 75, "Negotiation/Review", 85, "Closed Won", 100, "Closed Lost", 0, 20)`. The 'Advanced Formula' tab is also visible, and a 'Quick Tips' link is present in the top right corner.

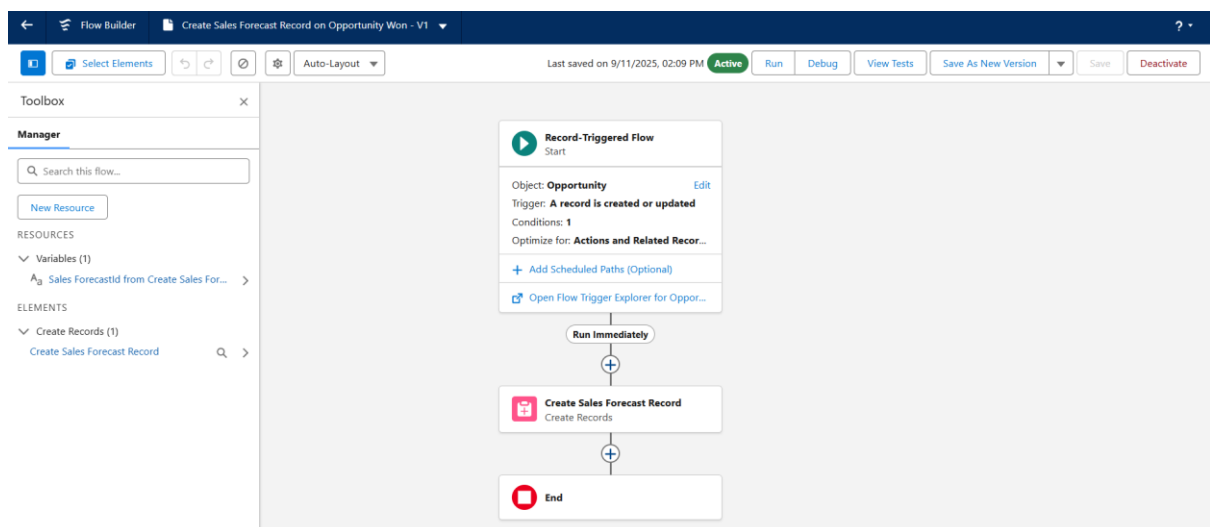
- Relationship diagram showing Opportunity ↔ Sales Forecast

Sales_Forecast__c	
Confidence_Score__c	Percent(3, 0)
CreatedBy	Lookup(User)
Forecast_Amount__c	Currency(18, 0)
Forecast_Period__c	Date
Forecast_Status__c	Picklist
LastModifiedBy	Lookup(User)
Name	Text(80)
Opportunity__c	Lookup(Opportunity)
Opportunity_Amount__c	Formula (Currency)
Owner	Lookup(User+1)

Opportunity	
Account	Lookup(Account)
Amount	Currency(16, 2)
Campaign	Lookup(Campaign)
CloseDate	Date
Contract	Lookup(Contract)
CreatedBy	Lookup(User)
CurrentGenerators__c	Text(100)
DeliveryInstallationStatus__c	Picklist
Description	Long Text Area(32000)
ExpectedRevenue	Currency(16, 2)
ForecastCategoryName	Picklist
IqScore	Number(9, 0)
IsPrivate	Checkbox
LastModifiedBy	Lookup(User)
LeadSource	Picklist
MainCompetitors__c	Text(100)
Name	Text(120)
NextStep	Text(255)
OrderNumber__c	Text(8)
Owner	Lookup(User)
Pricebook2	Lookup(Price Book)
Probability	Percent(3, 0)
Scorec__c	Formula (Percent)
Show More Fields	

Phase 4: Automation with Flows

- Designed a Record-Triggered Flow on Opportunity.
- Flow automatically creates a Sales Forecast when Opportunity is marked Closed Won.
- Field mappings ensure Forecast Amount, Period, Status, and Confidence Score are captured.
- Configured Flow condition using IsWon = True to trigger only on successful deals.
- Activated the flow and tested by closing test Opportunities.
- Verified new Sales Forecast records are automatically created.
- Considered extending automation with scheduled flows to refresh Confidence Scores daily.
- Future extension: email alerts when Confidence Score falls below threshold.
- Flow canvas showing Start + Create Records element



- Flow condition setup with IsWon = True]

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Opportunity

Configure Trigger

Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

Won


Operator

Equals

Value

True

- Activated flow list in Setup



SETUP

Flows

Flow

Create Sales Forecast Record on Opportunity Won

[Help for this Page](#)

[Back to List: Flows](#)

Flow Detail

Edit

Open

Run

Delete

Flow Label	Create Sales Forecast Record on Opportunity Won	Flow API Name	Create_Sales_Forecast_Record_on_Opportunity_Won
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Create_Sales_Forecast_Record_on_Opportunity_Won
Trigger	Record—Run After Save	Activated/Deactivated By	Amab Bhowmik 9/11/2025, 1:39 AM
Modified By	Amab Bhowmik 9/11/2025, 1:39 AM	Created By	Amab Bhowmik 9/11/2025, 1:38 AM

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow	Log Metrics to Data Cloud
Open Run Deactivate	Create Sales Forecast Record on Opportunity Won	1		Flow Builder	9/11/2025, 1:38 AM	Autolaunched Flow	Active	Activated	Default Mode	64.0	<input type="checkbox"/>






- Create Records element field mapping

Create a Record of This Object

*Object


Sales Forecast

Set Field Values for the Sales Forecast

Field		Value	
# Confidence Score ×	←	# Triggering Opportunity > Scorec ×	
📺 Forecast_Amount ×	←	📺 Triggering Opportunity > Amount ×	
📅 Forecast Period ×	←	📅 Triggering Opportunity > Close Date ×	
☰ Forecast Status ×	←	A _a Closed ×	
A _a Opportunity ×	←	A _a Triggering Opportunity > Opportunity ID ×	


Phase 5: Apex Programming (Developer)

- Declarative automation with Flows is fully functional for forecast creation.
- Apex introduced to extend automation and handle advanced cases.
- Apex classes used to prepare data for external reporting systems.

 **Apex Classes**

Apex Classes

Apex Code is an object oriented programming language that allows developers to develop on-demand business applications on the Lightning Platform.



Percent of Apex Used: 0.05%
You are currently using 3,097 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.


Estimate your organization's code coverage [\[+\]](#)

Compile all classes [\[+\]](#)

View: [All](#) [Create New View](#)


								A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Other	All
								Developer Console		New	Generate from WSDL		Run All Tests		Schedule Apex																				
Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags																												
Edit Del Security	RefreshSalesForecastBatch		64.0	Active	1,631	Amab Bhowmik, 9/22/2025, 3:10 AM	<input type="checkbox"/>																												
Edit Del Security	ScheduleForecastRefresh		64.0	Active	237	Amab Bhowmik, 9/22/2025, 3:10 AM	<input type="checkbox"/>																												

- Triggers can recalculate Confidence Score automatically on Opportunity updates.

 **Apex Triggers**

Apex Triggers

This page allows you to view and modify all the triggers in your organization. To create a new trigger, navigate to the appropriate sObject triggers page.



Percent of Apex Used: 0.05%
You are currently using 3,097 characters of Apex Code (excluding comments and @isTest annotated classes) in your organization, out of an allowed limit of 6,000,000 characters. Note that the amount in use includes both Apex Classes and Triggers defined in your organization.

Console all triggers [\[+\]](#)

View: [All](#) [Create New View](#)

								A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All																											
								Developer Console																											
Action	Name	Namespace Prefix	sObject Type	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags																											
Edit Del	OpportunityAfterUpdate		Opportunity	64.0	Active	1,229	Amab Bhowmik, 9/22/2025, 3:10 AM	<input type="checkbox"/>																											

- Batch Apex jobs refreshes forecasts for all Opportunities at quarter-end.
- Apex callouts could connect to external AI/ML APIs for predictive scoring.
- Provides flexibility to implement complex business logic beyond Flow capabilities.
- Ensures system is scalable as transaction volume increases.

Phase 6: Reporting & Dashboards

- Built Pipeline by Stage report with Weighted Amount field. Grouped Opportunities by Stage and visualized pipeline value with bar chart.
- Created Forecast vs Actual report using custom report type (Sales Forecasts with Opportunities).
- Added row-level formula to calculate variance between Forecast and Actual Opportunity Amount.
- Grouped by Forecast Period (Calendar Month) for time-based insights.
- Built Top Opportunities report, limited to 10 rows, sorted by Forecast Amount.
- Combined all three reports into Sales Forecasting Executive Dashboard.
- Dashboard includes:
 - Pipeline by Stage chart
- Added dashboard filters (Owner, Stage, Period) for flexible analysis.
- Ensured dashboard is user-friendly for executives and managers.
- Reports and dashboards provide both detailed and high-level visibility.

- Pipeline by Stage report table

Sales

Sales Forecasts

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

People

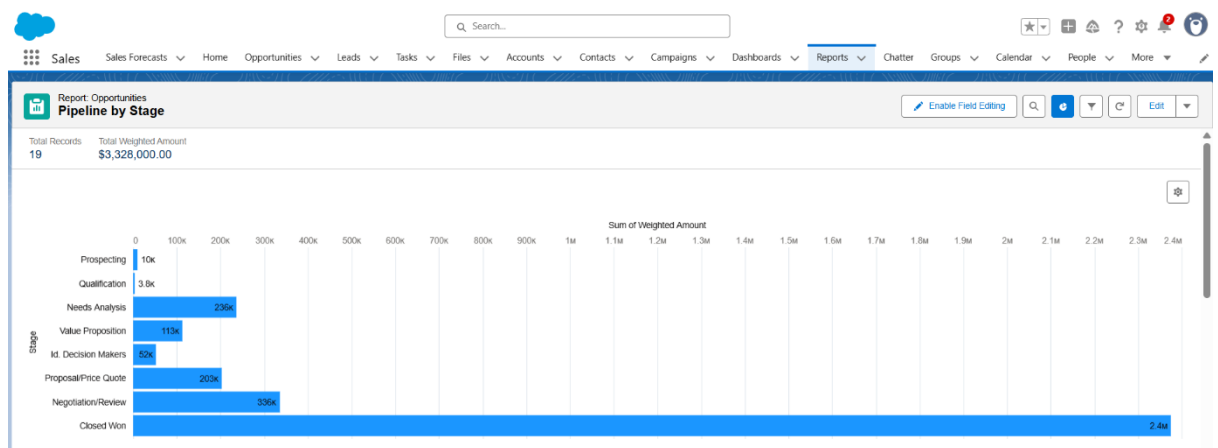
Cases

Forecasts


Search

<

- Pipeline by Stage report chart



- Top Opportunities report table



[Sales](#)
[Sales Forecasts](#)
[Home](#)
[Opportunities](#)
[Leads](#)
[Tasks](#)
[Files](#)
[Accounts](#)
[Contacts](#)
[Campaigns](#)
[Dashboards](#)
[Reports](#)
[Chatter](#)
[Groups](#)
[Calendar](#)
[People](#)
[More](#)

Report: Opportunities
Top Opportunities

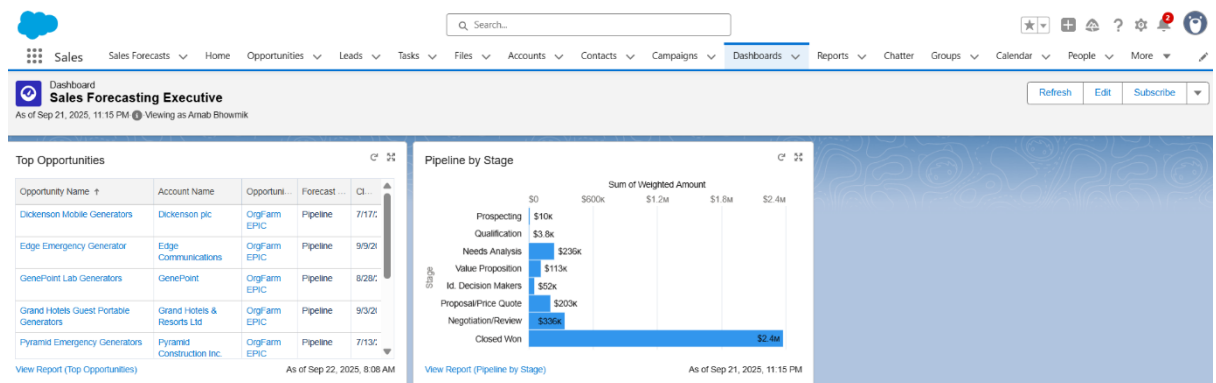
[Enable Field Editing](#)

Total Records
9

Total Amount
\$1,800,000.00

	Opportunity Name	Account Name	Opportunity Owner	Forecast Category	Close Date	Amount
1	Edge Emergency Generator	Edge Communications	OrgFarm EPIC	Pipeline	9/9/2025	\$35,000.00
2	United Oil Plant Standby Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/29/2025	\$675,000.00
3	United Oil Installations	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/1/2025	\$270,000.00
4	GenePoint Lab Generators	GenePoint	OrgFarm EPIC	Pipeline	8/28/2025	\$60,000.00
5	Pyramid Emergency Generators	Pyramid Construction Inc.	OrgFarm EPIC	Pipeline	7/13/2025	\$100,000.00
6	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	OrgFarm EPIC	Pipeline	9/3/2025	\$250,000.00
7	United Oil Refinery Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	8/19/2025	\$270,000.00
8	United Oil Office Portable Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/5/2025	\$125,000.00
9	Dickenson Mobile Generators	Dickenson plc	OrgFarm EPIC	Pipeline	7/17/2025	\$15,000.00
10						\$1,800,000.00

- Dashboard tab/panel



Phase 7: Integration & External Access

- Salesforce provides multiple options for integration and external access.
- Possible Google Sheets integration for managers who prefer spreadsheets.

Pipeline by Stage

As of 2025-09-22 08:34:04 Pacific Standard Time/PST • Generated by Arnab Bhowmik

Filtered By

Date Field: Close Date equals Current FQ (7/1/2025 to 9/30/2025)

Show: All opportunities

Opportunity Status: Any

Probability: All

Stage	1	Owner	Rc	Opportunity	Da	Account	Name	Opportunity	Name	Fiscal	Period	Amount	Expected	Rev.	Probability	%	Age	Close	Date	Created	Date	Next	Site	Lead	Source	Type	Weighted	Amount	
Prospecting				OrgFarm EPIC		Pyramid Construction Inc.		Pyramid Emergency Generators		Q1-2015	\$100,000.00	\$10,000.00			10%	14	7/13/2025	9/8/2025						Phone Inquiry		\$10,000.00	\$10,000.00		
Subtotal			Sum	Count	1																						\$3,750.00	\$3,750.00	
Qualification				OrgFarm EPIC		Dickenson plc		Dickenson Mobile Generators		Q1-2015	\$15,000.00	\$1,500.00			10%	14	7/17/2025	9/8/2025						Purchased List	New Customer		\$2,36,250.00	\$2,36,250.00	
Subtotal			Sum	Count	1																						\$12,500.00	\$12,500.00	
Needs Analysis				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Plant Standby Generators		Q1-2015	\$6,75,000.00	\$1,35,000.00			20%	14	7/23/2025	9/8/2025							Existing Customer - Upgrade		\$23,250.00	\$23,250.00	
Subtotal			Sum	Count	1																						\$112,500.00	\$112,500.00	
Value Proposition				OrgFarm EPIC		Grand Hotels & Resorts Ltd		Grand Hotels Guest Portable Generators		Q2-2015	\$2,50,000.00	\$1,25,000.00			50%	14	9/3/2025	9/8/2025						Employee Referral	Existing Customer - Upgrade		\$33,000.00	\$33,000.00	
Subtotal			Sum	Count	1																						\$19,250.00	\$19,250.00	
Id Decision Makers				OrgFarm EPIC		GenePoint		GenePoint Lab Generators		Q2-2015	\$35,000.00	\$21,000.00			60%	14	8/28/2025	9/8/2025								Existing Customer - Replacer		\$22,500.00	\$22,500.00
Subtotal			Sum	Count	1																						\$2,02,500.00	\$2,02,500.00	
Proposal/Price Quote				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Refinery Generators		Q2-2015	\$2,70,000.00	\$2,02,500.00			75%	14	8/19/2025	9/8/2025							Existing Customer - Upgrade		\$23,500.00	\$23,500.00	
Subtotal			Sum	Count	1																						\$106,250.00	\$106,250.00	
Negotiation/Review				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Office Portable Generators		Q1-2015	\$1,25,000.00	\$1,12,500.00			90%	14	7/5/2025	9/8/2025							Existing Customer - Upgrade		\$23,500.00	\$23,500.00	
Subtotal			Sum	Count	1																						\$3,35,750.00	\$3,35,750.00	
Closed Won				OrgFarm EPIC		GenePoint		GenePoint Standby Generator		Q1-2015	\$85,000.00	\$85,000.00			100%	0	7/8/2025	9/8/2025						Partner	New Customer		\$85,000.00	\$85,000.00	
				OrgFarm EPIC		United Oil & Gas Corp.		United Oil SLA		Q2-2015	\$1,20,000.00	\$1,20,000.00			100%	0	9/28/2025	9/8/2025						Partner	Existing Customer - Upgrade		\$1,20,000.00	\$1,20,000.00	
				OrgFarm EPIC		Edge Communications		Edge Emergency Generator		Q2-2015	\$75,000.00	\$75,000.00			100%	0	9/3/2025	9/8/2025						Word of mouth	New Customer		\$75,000.00	\$75,000.00	
				OrgFarm EPIC		GenePoint		GenePoint SLA		Q2-2015	\$30,000.00	\$30,000.00			100%	0	8/19/2025	9/8/2025						Partner	Existing Customer - Upgrade		\$30,000.00	\$30,000.00	
				OrgFarm EPIC		Grand Hotels & Resorts Ltd		Grand Hotels Generator Installations		Q2-2015	\$3,50,000.00	\$3,50,000.00			100%	0	8/17/2025	9/8/2025						External Referral	Existing Customer - Upgrade		\$3,50,000.00	\$3,50,000.00	
				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Refinery Generators		Q2-2015	\$9,15,000.00	\$9,15,000.00			100%	0	8/12/2025	9/8/2025						Partner	New Customer		\$9,15,000.00	\$9,15,000.00	
				OrgFarm EPIC		Burlington Textiles Corp of America		Burlington Textiles Weaving Plant Generator		Q1-2015	\$2,35,000.00	\$2,35,000.00			100%	0	7/10/2025	9/8/2025						Web	New Customer		\$2,35,000.00	\$2,35,000.00	
				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Installations		Q1-2015	\$2,35,000.00	\$2,35,000.00			100%	0	7/12/2025	9/8/2025						External Referral	Existing Customer - Upgrade		\$2,35,000.00	\$2,35,000.00	
				OrgFarm EPIC		United Oil & Gas Corp.		United Oil Standby Generators		Q2-2015	\$1,20,000.00	\$1,20,000.00			100%	0	8/27/2025	9/8/2025						External Referral	Existing Customer - Upgrade		\$1,20,000.00	\$1,20,000.00	
				OrgFarm EPIC		Grand Hotels & Resorts Ltd		Grand Hotels Emergency Generators		Q2-2015	\$2,10,000.00	\$2,10,000.00			100%	0	8/15/2025	9/8/2025						External Referral	New Customer		\$23,75,000.00	\$23,75,000.00	
Subtotal			Sum	Count	10																						\$33,28,000.00	\$33,28,000.00	
Total			Sum	Count	19																								

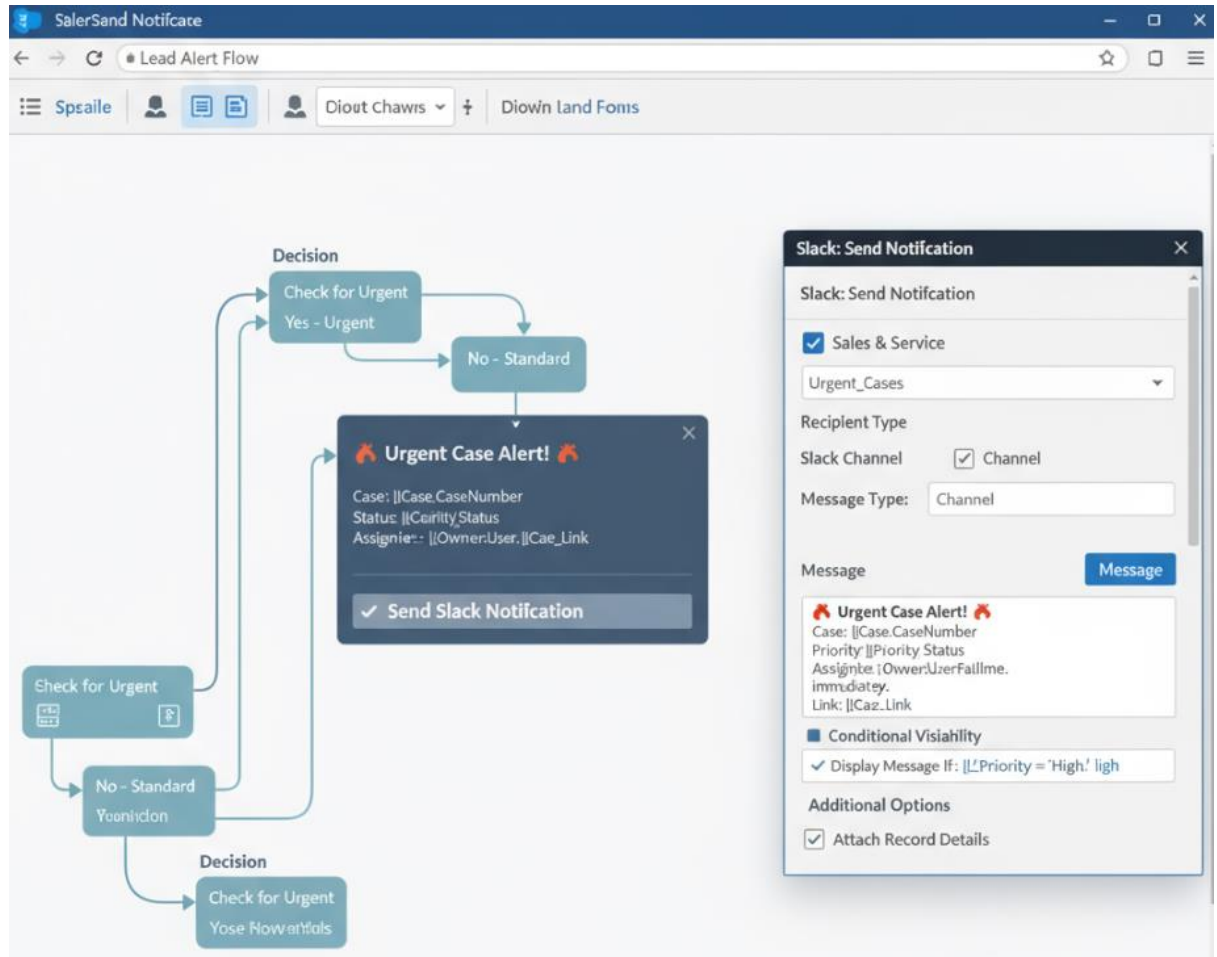
Top Opportunities

As of 2025-09-22 08:36:10 Pacific Standard Time/PST • Generated by Arnab Bhowmik

Filtered By
Date Field: Close Date equals Current FQ (7/1/2025 to 9/30/2025)
Show: All opportunities
Opportunity Status: Open
Probability: All

Opportunity Name	Account Name	Opportunity Owner	Forecast Category	Close Date	Amount
Edge Emergency Generator	Edge Communications	OrgFarm EPIC	Pipeline	9/9/2025	\$35,000.00
United Oil Plant Standby Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/29/2025	\$6,75,000.00
United Oil Installations	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/1/2025	\$2,70,000.00
GenePoint Lab Generators	GenePoint	OrgFarm EPIC	Pipeline	8/28/2025	\$60,000.00
Pyramid Emergency Generators	Pyramid Construction Inc.	OrgFarm EPIC	Pipeline	7/13/2025	\$1,00,000.00
Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	OrgFarm EPIC	Pipeline	9/3/2025	\$2,50,000.00
United Oil Refinery Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	8/19/2025	\$2,70,000.00
United Oil Office Portable Generators	United Oil & Gas Corp.	OrgFarm EPIC	Pipeline	7/5/2025	\$1,25,000.00
Dickenson Mobile Generators	Dickenson plc	OrgFarm EPIC	Pipeline	7/17/2025	\$15,000.00
Total	Sum				\$18,00,000.00
	Count	9			

- Slack or Email alerts could notify sales teams about high or low confidence deals (work in progress).



- External portals or Communities can provide executives secure real-time forecast access.
- API-based connections allow syncing with CRM or pipeline management tools.
- Enhancements can include automated push of monthly forecast summaries to leadership.
- REST API could be used to sync forecasts with ERP or Finance systems.
- Data can be exported into analytics platforms like Tableau or Power BI.

Phase 8: Deployment & Maintenance

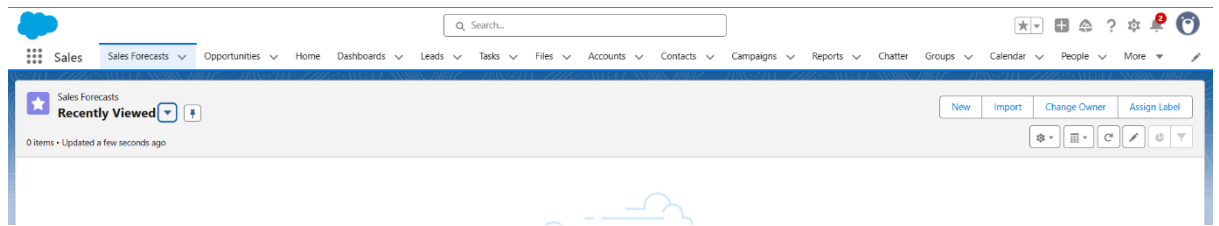
- Verified the entire solution in the Salesforce Developer Playground environment.
- Migrated metadata and configuration changes with Change Sets (if moving to production).
- Ensured visibility of all custom fields and objects for intended users.
- Conducted testing with sample data across multiple scenarios.
- Set up dashboards for continuous monitoring of forecasts.
- Prepared user documentation for sales teams.
- Scheduled periodic reviews for data model, automation, and reports.
- Future improvements: adjust scoring logic as business rules change.
- Maintenance plan includes regular backup and testing after Salesforce releases.
- Dashboard refresh history page

[illegible]

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, and Object Manager. The main content area is titled 'Profiles' and includes a sub-section for 'Custom Object Permissions'. This section contains a table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The table rows represent different objects, such as 'Sales Forecasts', with checkboxes indicating the permissions assigned to the current profile.

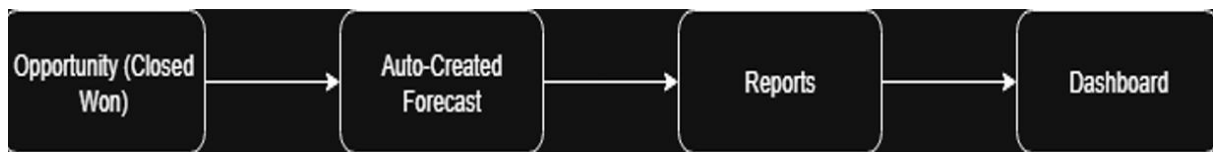
Phase 9: User Training & Adoption

- Conducted walkthrough sessions with sales users on the new forecasting process.
- Demonstrated how Opportunities automatically generate Sales Forecasts.
- Trained users to read and interpret Weighted Amount and Confidence Score.
- Showed navigation to custom reports and dashboards.
- Collected feedback from users about report layouts and chart preferences.
- Created a short reference guide for quick learning.
- Added the Sales Forecasts tab to Sales app navigation for easier access.
- Encouraged adoption by highlighting how automation saves time and improves accuracy.
- Planned ongoing user Q&A sessions during initial rollout.
- Sales app navigation bar with Forecasts tab



- Training slide or Flowchart

Sales Forecast Flowchart



- New Sales Forecast Creation Screen and App Launcher Search

Cloud logo

Search...

Sales Sales Forecasts Opportunities Home Dashboards Leads Tasks Files Accounts Contacts Campaigns Reports

Groups Calendar People More

Sales Forecasts Recently Viewed 0 items • Updated a few seconds ago

New Sales Forecast

* = Required Information

Information

Forecast Name

Owner Arnab Bhowmik

Forecast Amount

Forecast Period

Forecast Status

Confidence Score

Opportunity

Cancel Save & New Save

Cloud logo

Setup Home Object Manager

App Launcher

Search sales

Apps

- Salesforce Chatter**
- Sales Console**
- Sales**
- Salesforce Scheduler Setup**

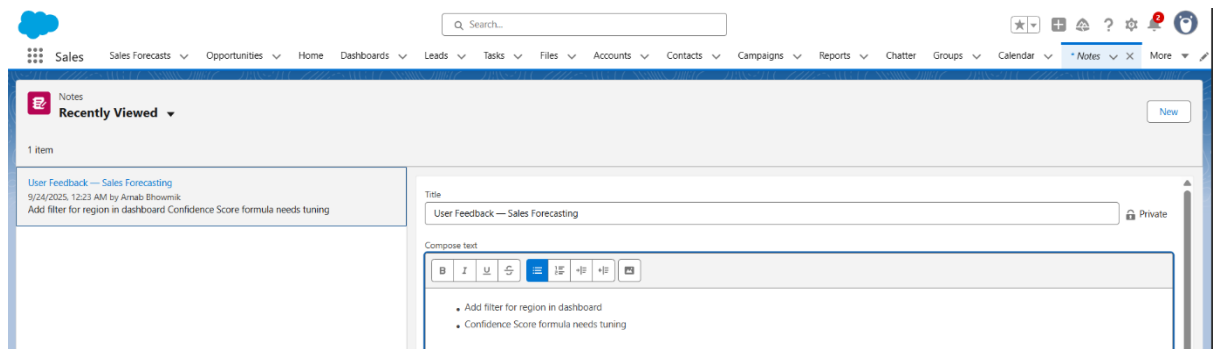
Items

- Sales Forecasts**
- Salesforce Scheduler Setup Assistant**

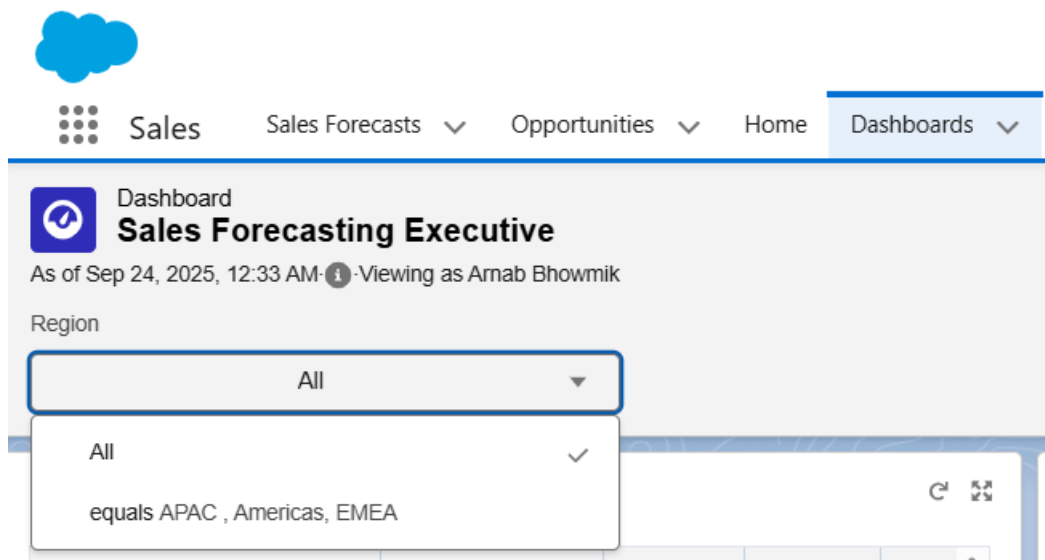
[View More](#)

Phase 10 — Maintenance & Continuous Improvement

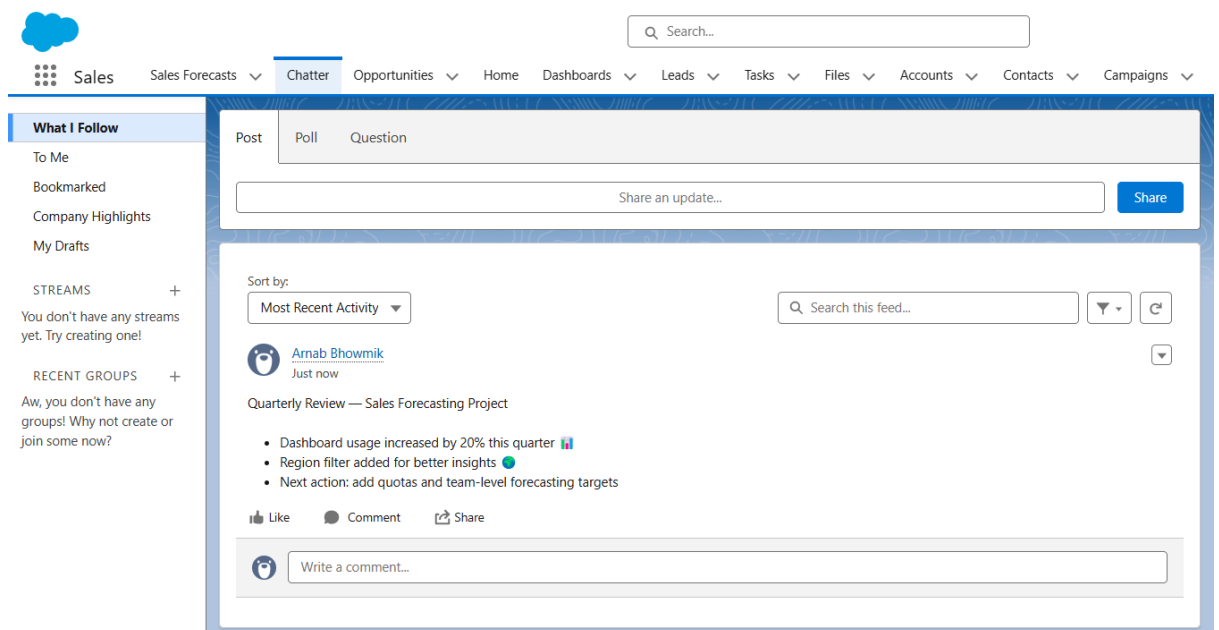
- Identified areas for improvement in report grouping and dashboard visuals.
- Evaluated automation logic to ensure flows trigger correctly.
- Gathered mentor/peer feedback for enhancements.
- Logged potential future features like AI integration and mobile dashboard access.
- Established a review cycle to refine forecasting logic quarterly.
- Planned scaling approach if migrated to production org.
- Continuous improvement process ensures long-term usability and accuracy.
- Documented lessons learned from each project phase.
- Feedback or Improvisation notes.



- Dashboard with highlighted improvements



- Chatter Post (Quarterly Review / Project Notes).



Conclusion

This project successfully demonstrates the design and implementation of a Sales Forecasting Process in Salesforce, built using standard Salesforce features like Objects, Flows, Reports, and Dashboards. By automating forecast creation and providing analytical reports, the solution improves sales visibility, accuracy, and decision-making.

The project highlights how structured implementation across phases — from setup and automation to reporting, dashboards, and user adoption — can deliver tangible business value in a short time.

Prepared by -

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College - Gyan Ganga Institute of technology and Science

Branch - Computer Science and Engineering

Github Repository Link -

<https://github.com/ArB-tech/SalesforceProject.git>

Demo Video Link -

https://docs.google.com/videos/d/11f_WGaScAwtFaMbRsQBJWndkiyNbEfXbEVONO4-wHks/edit?scene=id.p#scene=id.p