

Salesforce Project Documentation

TOPIC:

AI-Powered Sales Forecasting

Problem Statement:

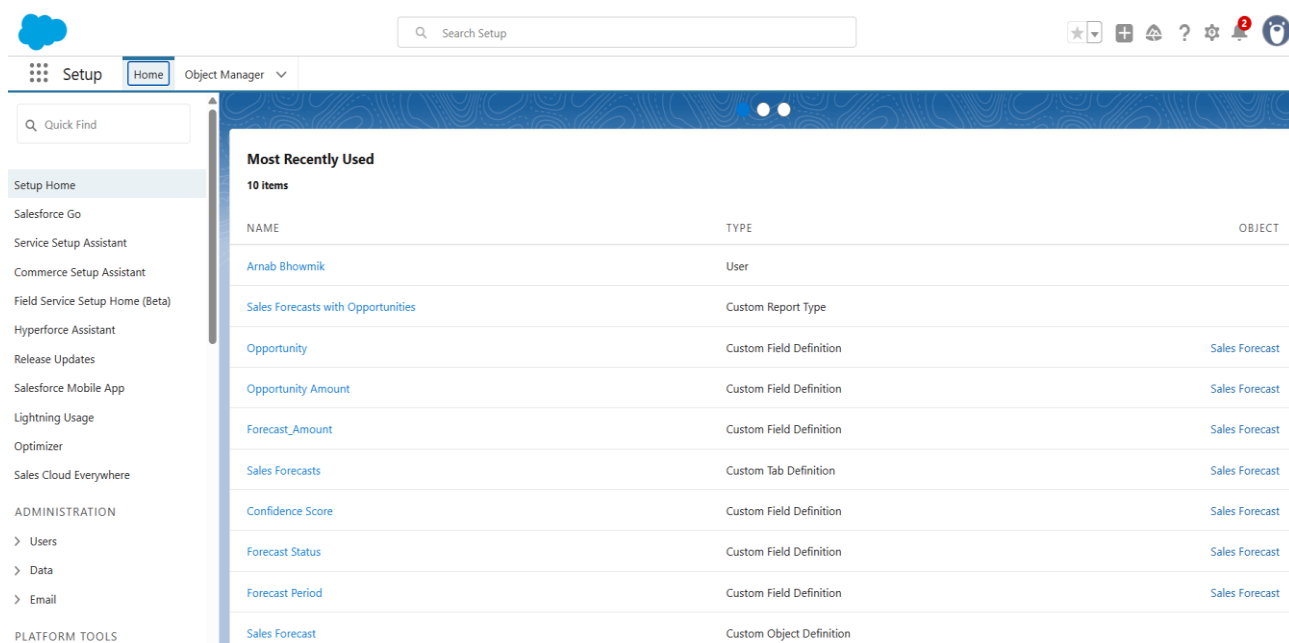
A technology company is struggling with inaccurate sales forecasting due to inconsistent pipeline management, manual processes, and lack of predictive insights. This leads to misallocated resources, missed revenue targets, and a lack of proactive decision-making, resulting in inefficiencies across sales 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: 'Close Deals' (Total Pipeline: \$0), 'Plan My Accounts' (Accounts owned by me: 0), 'Grow Relationships' (Contacts owned by me and created in the last 90 days: 0), 'Build Pipeline' (Leads owned by me and created in the last 30 days: 0), 'My Goals' (Set personal weekly or monthly goals for emails, calls, and meetings), and 'Today's Events'.

Phase 3: Data Modeling & Relationships

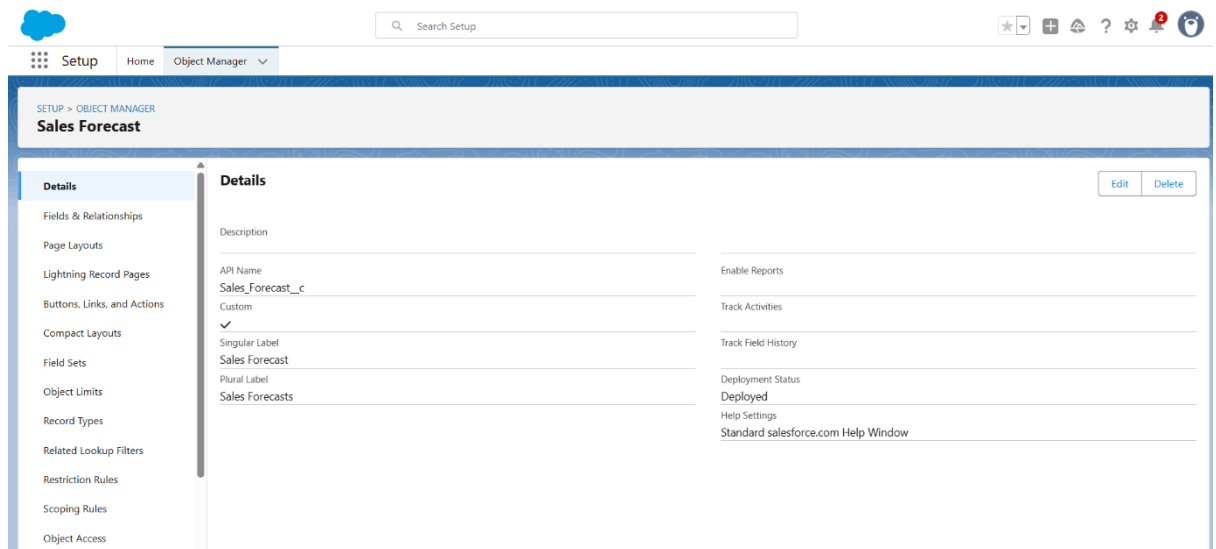
- Created custom object **Sales_Forecast__c** with fields:
- Forecast Amount (Currency)
- Forecast Period (Date)
- Forecast Status (Picklist: Draft, Approved, Closed)
- Confidence Score (Percent)
- Opportunity (Lookup to Opportunity)
- Added a custom tab for Sales Forecasts to make them accessible.
- 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 below lists the objects:

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

The interface also includes a search bar for 'sales f', a 'Schema Builder' button, and a 'Create' button with a dropdown arrow.

- Details page

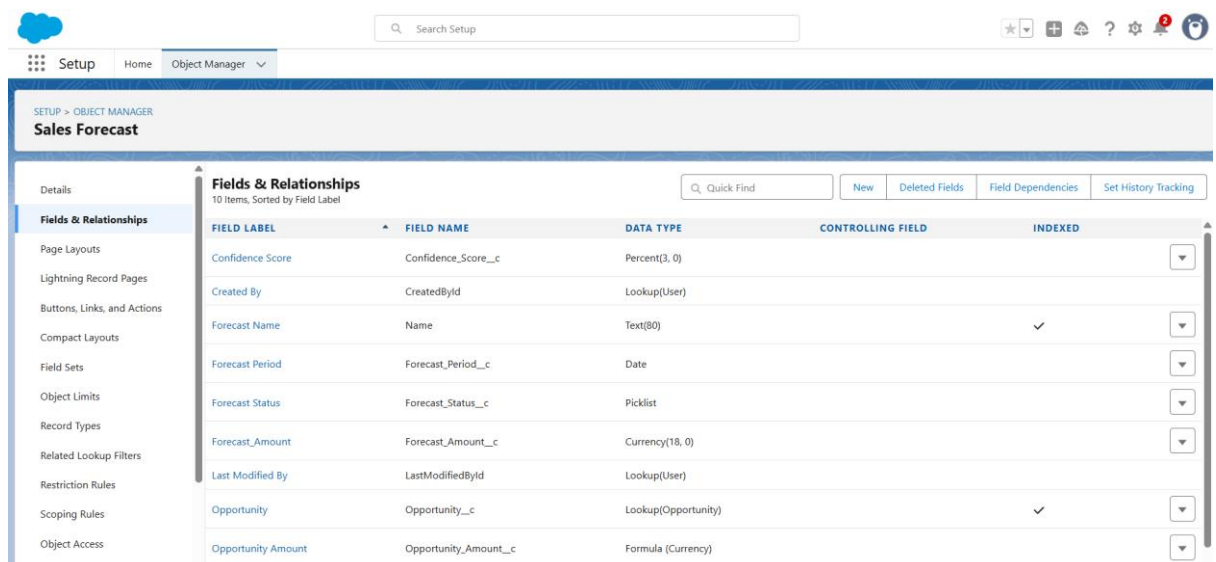


The screenshot shows the Salesforce Setup interface for the 'Sales Forecast' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, 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.

| 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) | | |

At the top of the table, there is a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

- Formula field setup for Score__c

The screenshot shows the 'Edit Opportunity Custom Field' page for a field named 'Scorec'. The page is titled 'Custom Field Definition Edit' and includes a 'Field Information' section. The 'Field Label' is 'Scorec', the 'Field Name' is 'Scorec', and the 'Description' is empty. The 'Data Owner' is 'User', and the 'Field Usage' is 'None'. The 'Data Sensitivity Level' is 'None'. The 'Compliance Categorization' section shows 'Available' categories: PII, HIPAA, GDPR, and PCI. The 'Chosen' category is empty. The 'Save', 'Quick Save', and 'Cancel' buttons are at the top right.

The screenshot shows the 'Formula Options' page for the 'Scorec' field. The 'Formula Return Type' is 'Percent' and the 'Decimal Places' are '2'. The 'Simple Formula' tab is selected, and the formula is: `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. The 'Quick Tips' section on the right provides links to 'Getting Started' and 'Operators & Functions'.

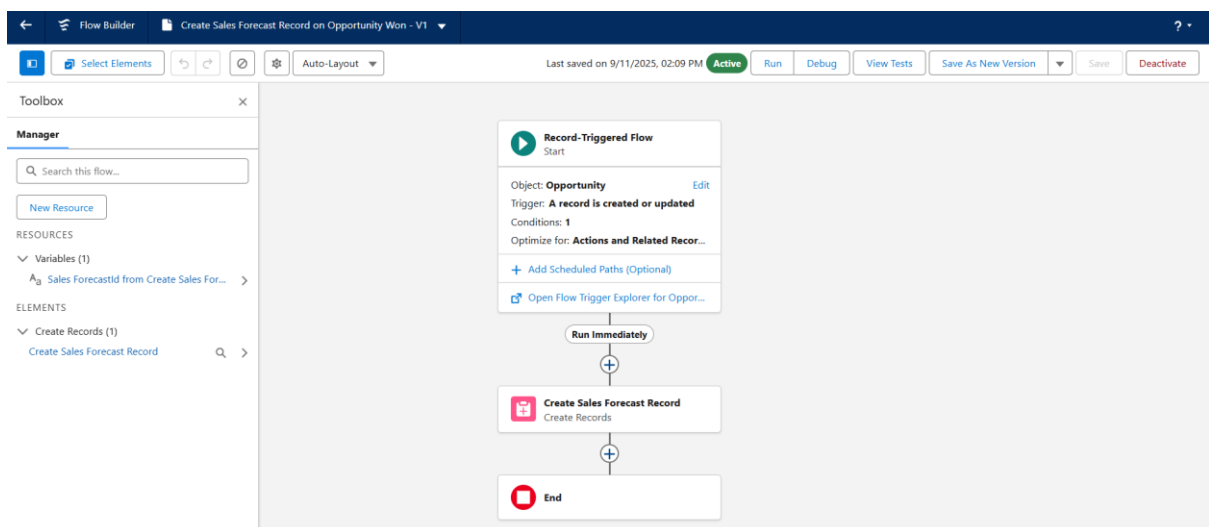
- Relationship diagram showing Opportunity ↔ Sales Forecast

| 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](#)

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](#)

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

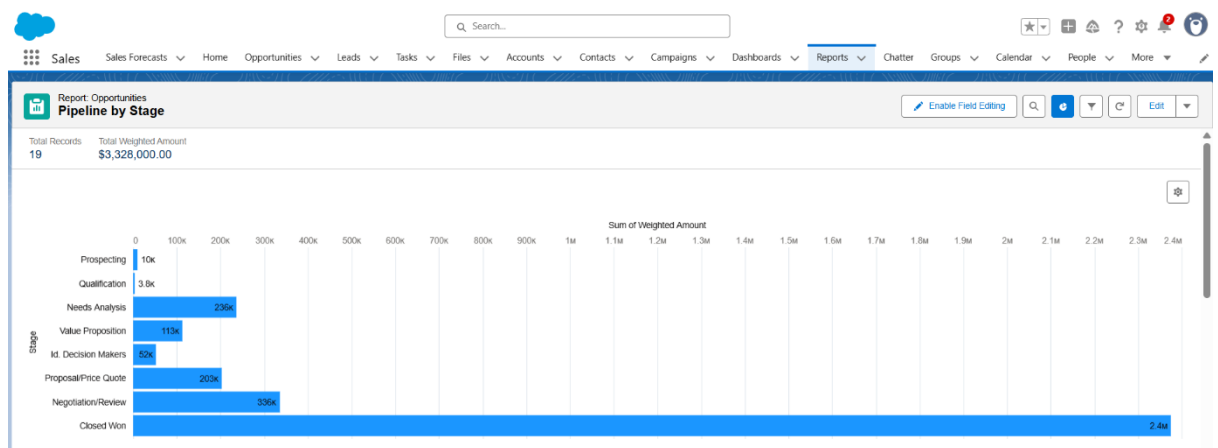
Cases

Forecasts

Search

<

- Pipeline by Stage report chart

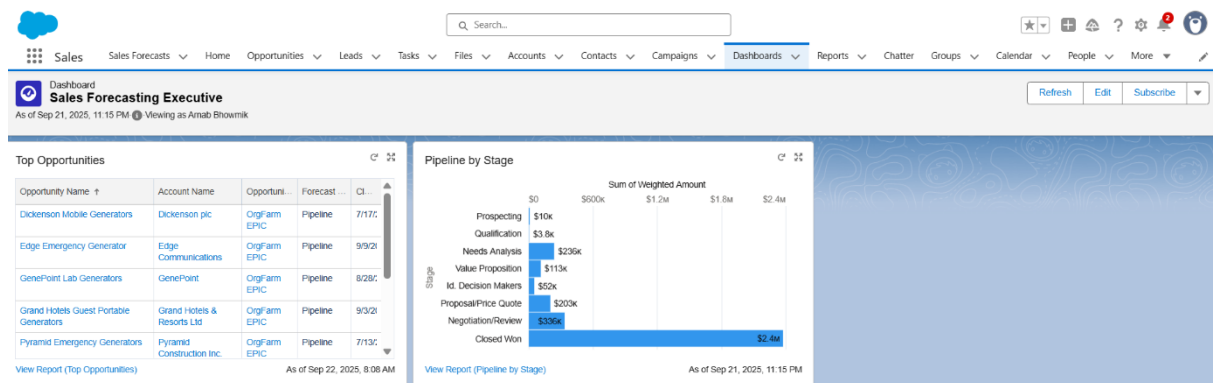


- Top Opportunities report table

The screenshot shows the Salesforce 'Top Opportunities' report. The header includes a search bar and navigation tabs like Sales, Sales Forecasts, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The report title is 'Report: Opportunities Top Opportunities'. Below the title, it shows 'Total Records: 9' and 'Total Amount: \$1,800,000.00'. The table has columns for Opportunity Name, Account Name, Opportunity Owner, Forecast Category, Close Date, and Amount. The data rows list various opportunities, all with a 'Pipeline' forecast category and a close date in 2025. The total amount for all opportunities is \$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 Perio | Amount | Expected Rev | Probability (%) | Age | Close Da | Created Da | Next Ste | Lead Source | Type | Weighted Amount |
|----------------------|---|-------|-------|--------------|----|-------------------------------------|---|--------------|---------------|---------------|-----------------|-----|-----------|------------|----------|-------------------|------------------------------|-----------------|
| Prospecting | | | | OrgFarm EPIC | | Pyramid Construction Inc. | Pyramid Emergency Generators | Q1-2015 | \$1,00,000.00 | \$10,000.00 | 10% | 14 | 7/13/2025 | 9/8/2025 | | Phone Inquiry | | \$10,000.00 |
| Subtotal | | Sum | Count | 1 | | | | | | | | | | | | | | \$10,000.00 |
| 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 | \$3,750.00 |
| Subtotal | | Sum | Count | 1 | | | | | | | | | | | | | | \$3,750.00 |
| 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 | 7/29/2025 | 9/8/2025 | | | Existing Customer - Upgrade | \$2,36,250.00 |
| Subtotal | | Sum | Count | 1 | | | | | | | | | | | | | | \$2,36,250.00 |
| 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 | \$1,12,500.00 |
| Subtotal | | Sum | Count | 1 | | | | | | | | | | | | | | \$1,12,500.00 |
| Id Decision Makers | | | | OrgFarm EPIC | | GenePoint | GenePoint Lab Generators | Q2-2015 | \$50,000.00 | \$36,000.00 | 60% | 14 | 8/28/2025 | 9/8/2025 | | | | \$33,000.00 |
| Subtotal | | Sum | Count | 1 | | Edge Communications | Edge Emergency Generator | Q2-2015 | \$35,000.00 | \$21,000.00 | 60% | 14 | 9/8/2025 | 9/8/2025 | | | Existing Customer - Replacer | \$19,250.00 |
| Subtotal | | Sum | Count | 2 | | | | | | | | | | | | | | \$52,250.00 |
| 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 | \$2,02,500.00 |
| Subtotal | | Sum | Count | 1 | | | | | | | | | | | | | | \$2,02,500.00 |
| 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 | \$1,06,250.00 |
| Subtotal | | Sum | Count | 1 | | United Oil Installations | | Q1-2015 | \$2,70,000.00 | \$2,43,000.00 | 90% | 14 | 7/1/2025 | 9/8/2025 | | | Existing Customer - Upgrade | \$2,23,500.00 |
| Subtotal | | Sum | Count | 2 | | | | | | | | | | | | | | \$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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| | | | | 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 |
| Subtotal | | Sum | Count | 10 | | | | | | | | | | | | | | \$33,28,000.00 |
| Total | | Sum | Count | 19 | | | | | | | | | | | | | | \$33,28,000.00 |

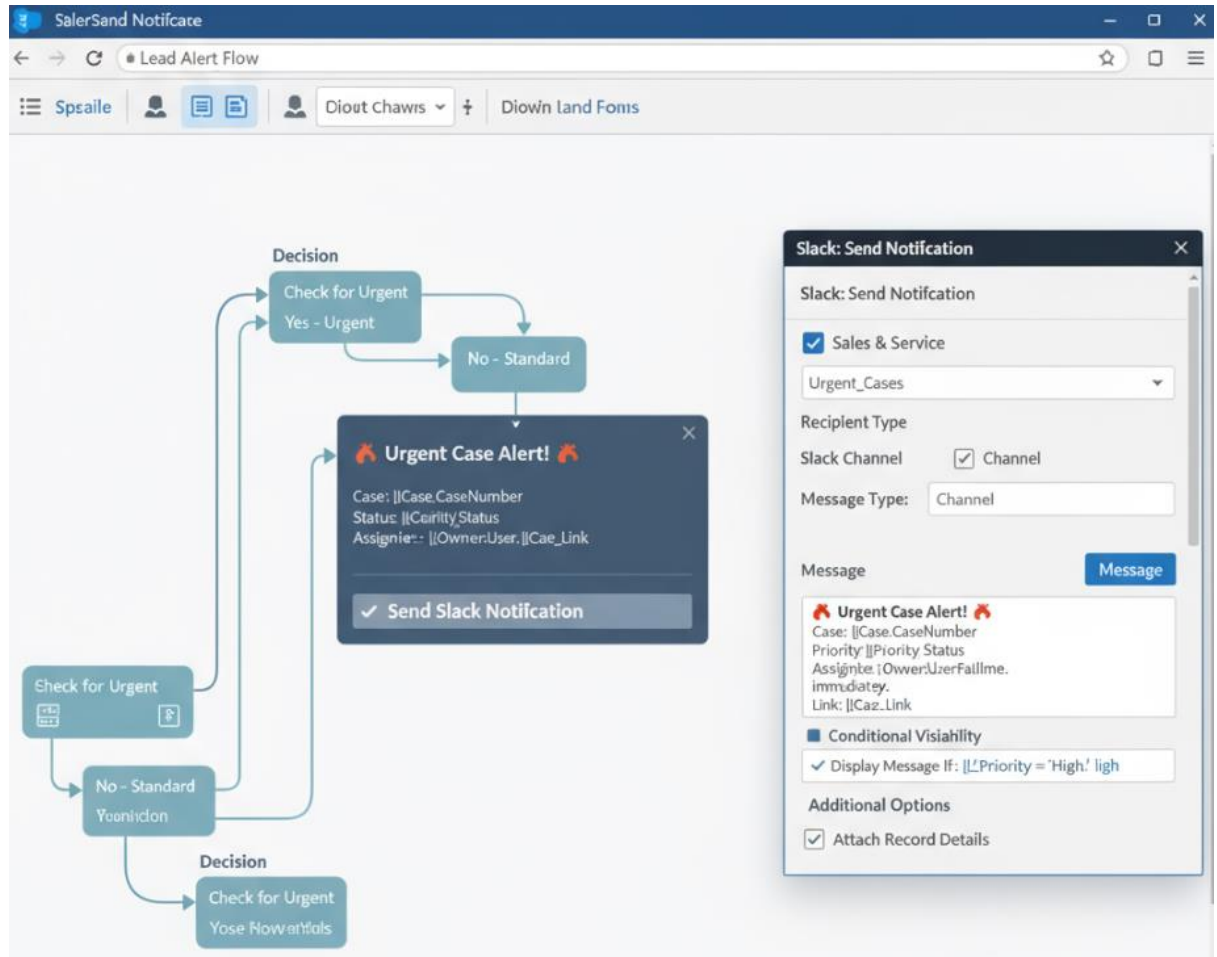
Top Opportunities

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 | Count | 9 | | \$18,00,000.00 |

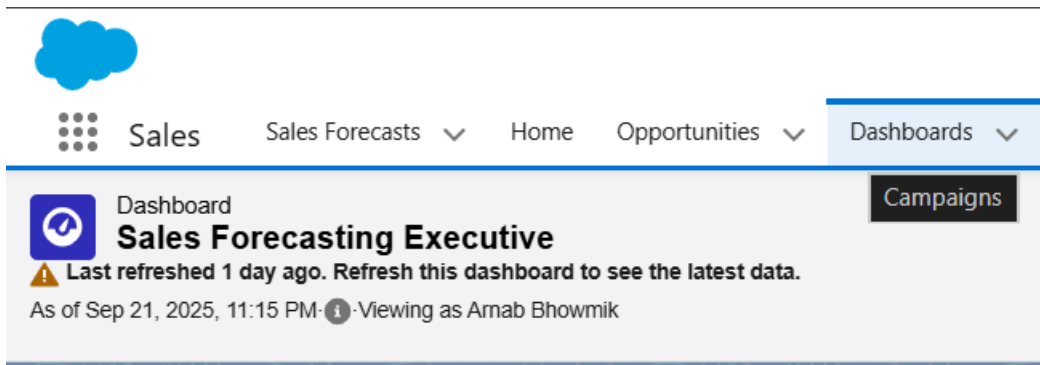
- Slack or Email alerts could notify sales teams about high or low confidence deals (work in progress).



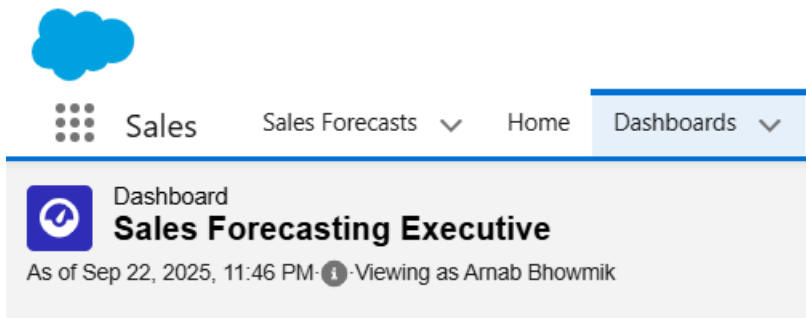
- External portals or Communities can provide executives secure real-time forecast access.
- API-based connections allow syncing with CRM or pipeline management tools.
- Enhancements can include automated push of monthly forecast summaries to leadership.
- REST API could be used to sync forecasts with 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

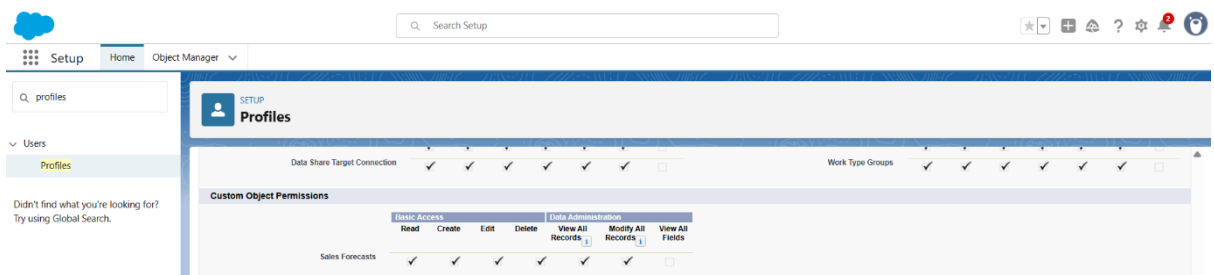


After refresh.

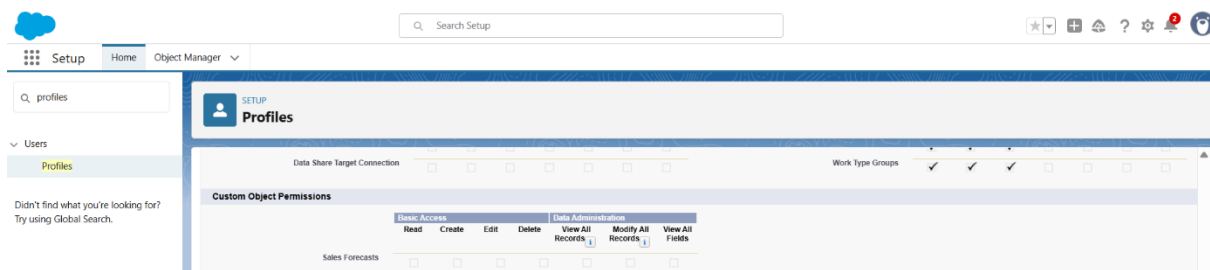


- User profile showing Sales Forecast object permissions

System Administrator (Profile)

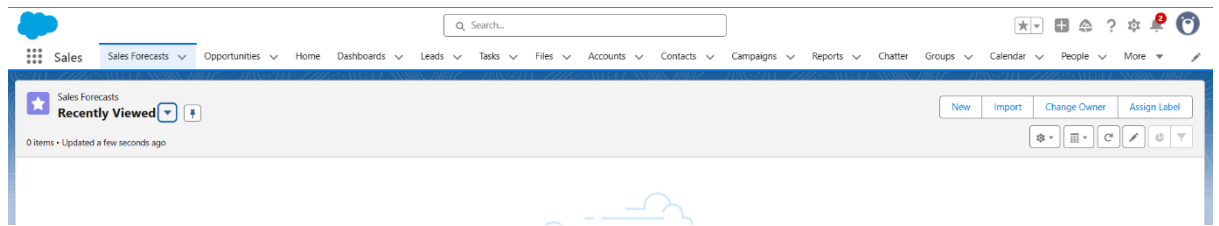


Standard User (Profile)



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**

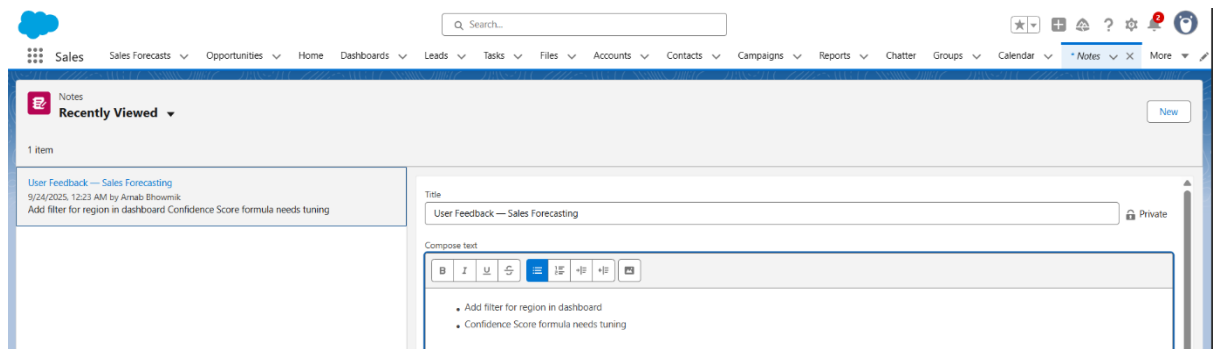
Items

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

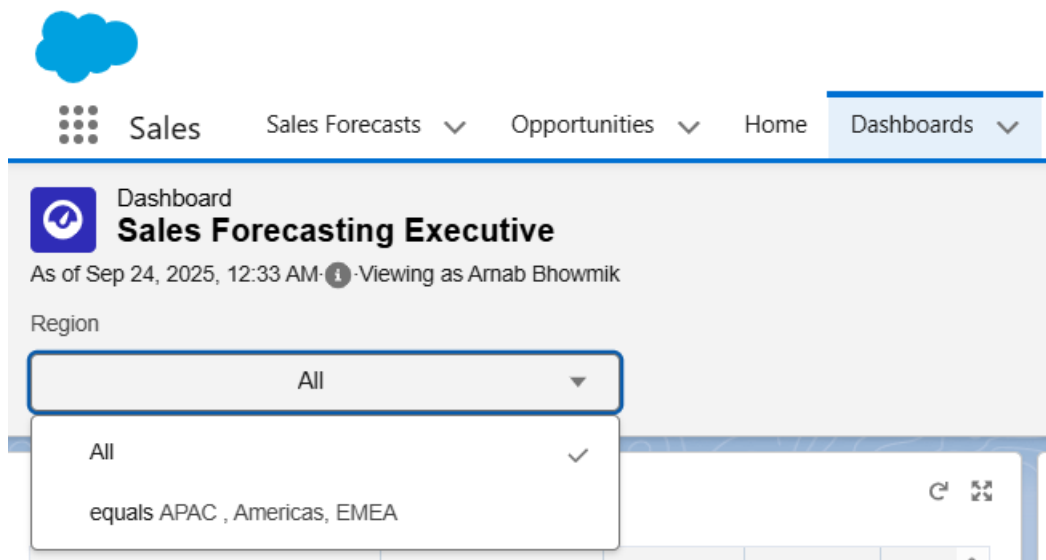
[View More](#)

Phase 10 — Maintenance & Continuous Improvement

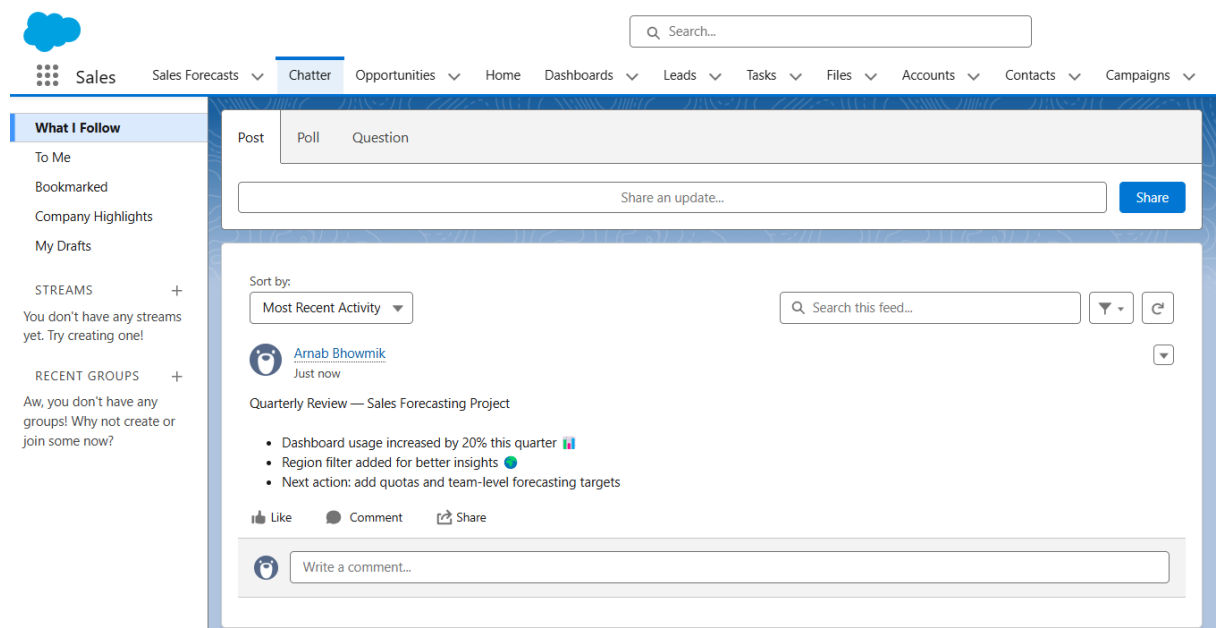
- Identified areas for improvement in report grouping and dashboard visuals.
- Evaluated automation logic to ensure flows trigger correctly.
- Gathered mentor/peer feedback for enhancements.
- Logged potential future features like AI integration and mobile dashboard access.
- Established a review cycle 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.



- [Insert Screenshot: 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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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