

Stock Market Predictions

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

The goal is to help investors and analysts manage stock data inside Salesforce.

- Store stock details (company name, ticker, sector, price).
- Allow investors to track their portfolios (buy/sell transactions).
- Show predictions (future price trends).
- Provide reports and dashboards (gains/losses, prediction accuracy).
- Send alerts when stock crosses certain thresholds.

2. Stakeholder Analysis


- Investors (End Users) → Want to see their portfolio and stock predictions.
- Financial Analysts → Need dashboards to compare stock performance.
- Admin/Developer → Setup objects, flows, automation, and integrations.
- Executives → Want summary dashboards for decision making.

3. Business Process Mapping

- Current Process (outside Salesforce):
- Investors use multiple apps like Yahoo Finance, Excel, TradingView.
- Predictions are either manual or from third-party websites.
- No single system to combine portfolio + real-time data + predictions.
- Proposed Process (inside Salesforce):
- Salesforce fetches stock data from an external API.
- Data is stored in custom objects (Stock, Portfolio, Transaction, Prediction).

- Automation updates portfolio value and prediction records.
- Reports and dashboards show insights (Top gainers, Loss %).
- Alerts sent to investors when price moves significantly.

4. Industry-Specific Use Case Analysis

- Retail Investors → Manage their personal stock portfolios inside Salesforce.
- Investment Firms → Track multiple client portfolios in one platform.
- Wealth Management Companies → Give AI-based recommendations using predictions.
-  Example: If an investor has 10 shares of Company, Salesforce shows:
- Current Value = Quantity × Price.
- Predicted Next Price = +5%.
- System sends an alert: “Your Company holdings may rise 5% tomorrow.”

5. AppExchange Exploration

- Existing apps provide stock tickers or financial dashboards.
- But there is no complete prediction-focused app on AppExchange.
- This project fills that gap by combining portfolio tracking + prediction + alerts.