PROJECT DOCUMENTATION

Salesforce Deal Validation

How every awarded deal in a contractor's CRM came to be checked by AI against the order the customer signed.

DURATION	READS	CRM ACCESS	STATUS
6 weeks	AR and EN	Read only	Live
Discovery to support	Scans included	Never written to	Cairo, Egypt

CLIENT	REFERENCE	DURATION
Confidential	PD-Ektra_0012	6 weeks
CATEGORY	**VERSION**	**PREPARED BY**
AI and Automation	1.0	Ektra Tech

IN THIS DOCUMENT

01 Overview 02 The constraint 03 How we found it 04 The solution 05 Modules and features 06 How it works 07 Project steps 08 Pictures 09 Delivery timeline 10 Results 11 Support and next steps

Ektra Tech
info@ektra-eg.com
Commercial register 307628

01 OVERVIEW

The project at a glance

An AI layer over a contractor's CRM: for every awarded deal it reads the signed purchase order or contract and checks what it says against the deal.

CLIENT **Confidential**	KIND OF PROJECT **AI document checks**	PLATFORM **CRM, AI, dashboards**	DURATION **6 weeks**
DELIVERED BY **Ektra Tech**	STATUS **Live**	LOCATION **Cairo, Egypt**	LIVE LINK **Private, client network**

VALUES READ
6 per document
Date, type, total, currency, rate, brands

LANGUAGES
2
Arabic and English, scans included

CRM WRITES
None
Read only, by design

02 THE CONSTRAINT

What held the client back

The sales team recorded every awarded deal in Salesforce and attached the signed purchase order or contract as a file. The figures inside those files were never typed anywhere.

- **No way to compare:** nobody could tell whether a deal in the CRM matched what the customer actually signed.
- **Locked in files:** the date, the total and the currency lived only inside PDFs and pictures, not in any field.
- **Hard to read:** scanned pages, Arabic and English documents, totals with VAT inside, contracts in two currencies.
- **Too many to check by hand:** a manual check could not keep up with the deals being awarded.

The risk in one line: the CRM and the signed documents could disagree, and the gap was found by chance, if at all.

03 HOW WE FOUND IT

Discovery

We followed awarded deals and their files in the CRM and looked at where the recorded figures drift from the signed paper.

01 **Walked the files.** How documents are attached to a deal, how they are named, and how often a deal carries several versions.

02 **Sorted the documents.** Purchase orders and contracts, in Arabic and English, clean PDFs and phone scans, and the deals that only hold an offer or a letter of intent.

03 **Named the values.** The date, the document type, the total without VAT, the currency, the rate and the brands: what a reviewer needs to compare a deal with its document.

04 **Set the rules for a person.** Scans and handwriting, totals with VAT inside, two currencies in one contract, and any total that disagrees with the deal go to a human.

04 THE SOLUTION

What Ektra built

An AI layer that reads the documents themselves, checks every value against the deal, and shows the result to the people who need it.

- **Read-only sync:** the deals are copied from Salesforce into a database of their own every few minutes; deletions are reconciled and kept on record.
- **Document finder:** the purchase order or contract is found among the deal's files by its name in Arabic or English; unnamed scans are sorted by AI.
- **AI reading:** each document is turned into page images and read by a vision model, which returns every value with its confidence.
- **Checks against the deal:** the document total is compared with the CRM, VAT-inclusive totals are brought back to net, and every total is converted to US dollars.
- **Review list:** anything that disagrees, or that the AI is not sure of, is listed with a link straight to the document.
- **New deals on their own:** a workflow watches for newly awarded deals without a reading and starts the extraction.

The CRM is only ever read, never written to. The checks point at the deal; the sales team corrects it at the source.

The stack

SOURCE **Salesforce, read only**	SYNC **Salesforce CLI, scheduled**	DATABASE **PostgreSQL**	AI **Vision model, AR and EN**
DOCUMENTS **PDF to page images**	ORCHESTRATION **n8n workflow**	DASHBOARDS **Metabase, read only**	AUDIT **Review flags, delete log**

05 MODULES AND FEATURES

What the system holds

Eight parts, from the deal in the CRM to the dashboard and the training.

MODULE	WHAT IT DOES	STATUS
M1 CRM sync	Deals copied from Salesforce on a schedule, changes only, deletions reconciled and logged	Live
M2 Document finder	The purchase order or contract picked from the deal's files, the latest one when there are several, with a note	Live
M3 AI reader	Pages read in Arabic or English, scans included: date, type, total without VAT, currency, rate, brands	Live
M4 Deal checks	Each value against the deal; VAT, currency and rate handled; a confidence on every reading	Live
M5 Review list	Mismatches and low confidence, each with a link to the document in the CRM	Live
M6 Auto-extract	A newly awarded deal without a reading starts the extraction by itself	Live

MODULE	WHAT IT DOES	STATUS
M7 Dashboards	The official document per deal and the needs-review tab, for leadership and audit	Live
M8 Data accuracy training	A short training for the sales team on keeping deals right at the source	Delivered

Features worth a line

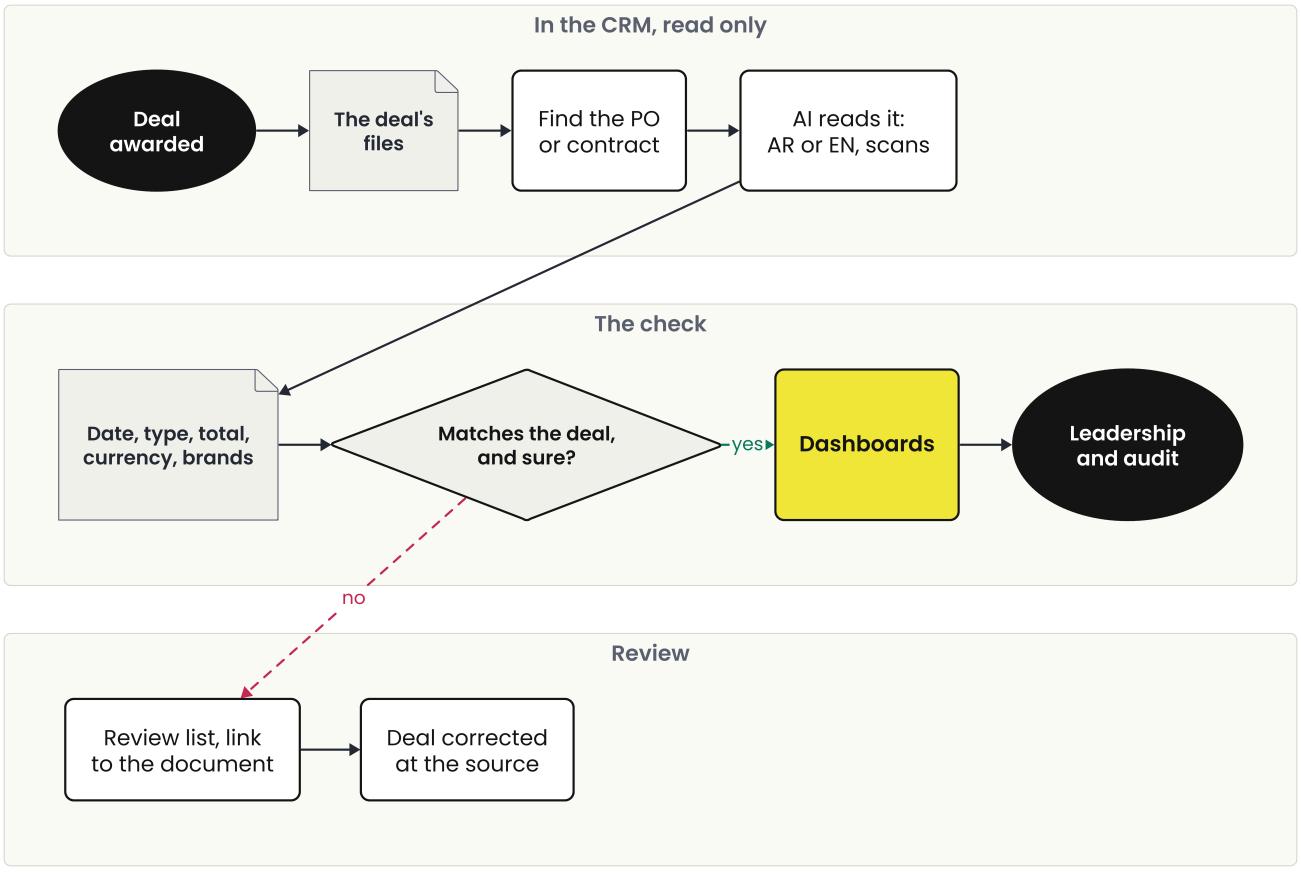
- Arabic and English documents, scans included
- Two-currency contracts flagged for a person
- Latest document chosen when there are several
- Deletions in the CRM kept on an audit record
- Totals with VAT inside brought back to net
- Every total also shown in US dollars
- A link from every row to its document
- Nothing written back to the CRM

06 HOW IT WORKS

The flow, start to end

From the moment a deal is awarded, its document is found, read, checked and shown, without anyone typing a figure.

FROM AN AWARDED DEAL TO A CHECKED RECORD



The CRM is only read. Corrections are made by the sales team in the CRM itself, and the next sync picks them up.

01 **The deal is awarded.** The sales team marks it won in the CRM and attaches the signed purchase order or contract.

02 **The document is found.** Among the deal's files, by name in Arabic or English, or by AI when the file is an unnamed scan.

03 **AI reads it.** In Arabic or English, scans included: the date, the type, the total without VAT, the currency, the rate and the brands.

04 **The values are checked.** Against the deal in the CRM, with VAT and currency taken into account.

05 **Doubts go to review.** A mismatch or a low confidence lands on the review list with a link to the document.

06 **Leadership and audit see it.** Live dashboards show the official document behind every deal and what still needs a look.

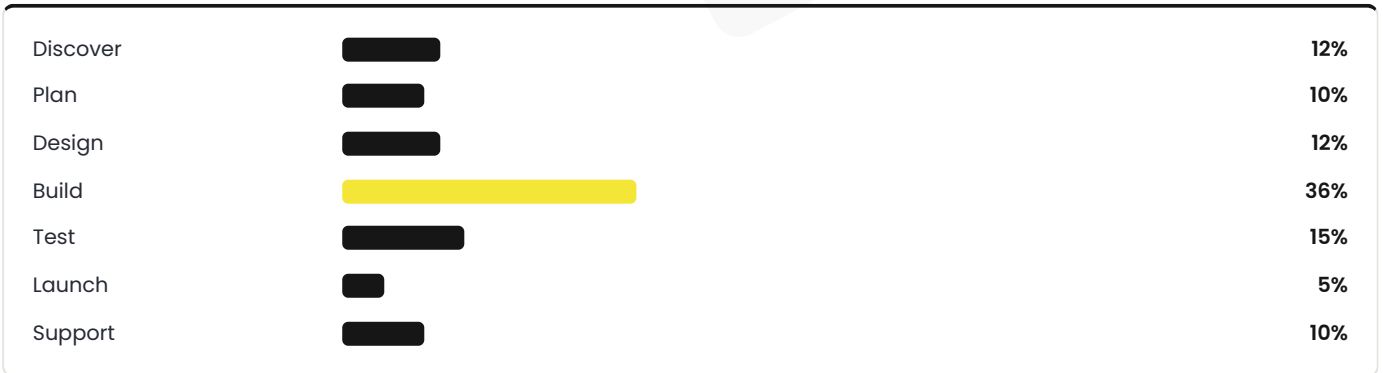
07 PROJECT STEPS

6 weeks, seven phases

Six weeks in seven phases; here is what each one did for the deal checks and the share of the time it took.

PHASE	WHAT WAS DONE	SHARE	TIME
01 Discover	How deals and their documents live in the CRM Where the figures drift from the signed paper	12%	5 days
02 Plan	The fields to read and the checks against each deal The rules for what needs a person	10%	4 days
03 Design	The review list The dashboards for leadership and audit	12%	5 days
04 Build	Document selection, AI reading in Arabic and English The checks, and the sync from Salesforce	36%	15 days
05 Test	Every reading compared with its document The unclear ones routed to review	15%	7 days
06 Launch	The dashboards opened to leadership and audit	5%	2 days
07 Support	The data accuracy training for the sales team The review rounds that followed	10%	4 days

Share of the duration

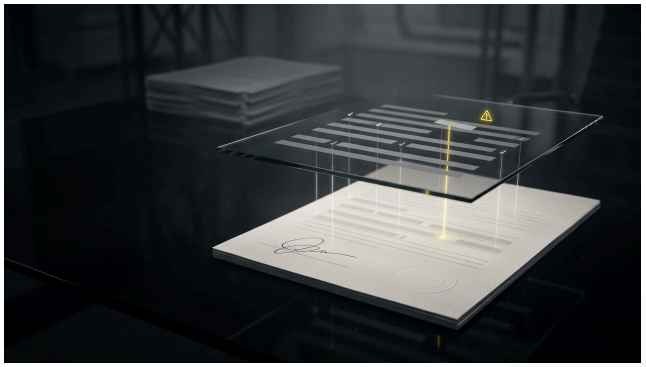


08 PICTURES

AI-generated

Pictures made with AI for this project. No screen of the client's systems is shown: the client's data stays private.

SALESFORCE DEAL VALIDATION, AS PICTURED



The deal and its signed document, read side by side



The document read in Arabic or English, scans included



Each value checked against the deal



Mismatches surfaced for review

09 DELIVERY TIMELINE

42 days end to end

The 6 weeks, phase by phase, from the first conversation to the first weeks in use.

DAYS 1 TO 5 **Discover**
The document kinds, the values and the gaps.

DAYS 6 TO 9 **Plan**
The checks and the review rules agreed.

DAYS 10 TO 14 **Design**
What each reader sees, approved.

DAYS 15 TO 29 **Build**
The pipeline, end to end.

DAYS 30 TO 36 **Test**
Readings proven against the paper.

DAYS 37 TO 38 **Launch: go-live**
The checks live for every awarded deal.

DAYS 39 TO 42 **Support**
Deals kept right at the source.

10 RESULTS

What changed

What changed, as confirmed by the people who use it. No figure is published: the client's data stays private.

- One source of truth between the CRM and the signed documents.
- Mismatches are surfaced for review instead of found by chance.
- Every awarded deal shows the official document behind it, one click away.
- Leadership and audit follow it on live dashboards, and the sales team keeps deals right at the source.

> Deal counts, amounts and dates are the client's own and are never published.

11 SUPPORT AND NEXT STEPS

After launch

The checks run by themselves; people step in only where the AI is not sure.

- **Running:** new awarded deals are read without anyone starting a job; deletions in the CRM are reconciled on a schedule.
- **Review:** the needs-review list is worked through and the deals are corrected in the CRM.
- **People:** the data accuracy training keeps new sales staff entering deals the same way.

Next steps

- More values checked as the team asks for them
- Refresher sessions of the data accuracy training

End of document
Version 1.0. An AI layer that keeps your CRM honest: info@ektra-eg.com.

REFERENCE
PD-EKTRA_0012