

Performance and Testing

Date	06 NOV 2025
Team ID	NM2025TMID07115
Project Name	CRM Application for Jewel Management - (Developer)
Maximum Marks	4Marks

Model Performance Testing

High-level goals

- Centralize customers, sales, inventory, repairs, appraisals, and warranties.
- Speed up in-store and remote sales with accurate inventory and pricing.
- Reduce accidental data loss (e.g., deleting records with active orders).
- Improve customer retention with follow-ups, service reminders, and targeted campaigns.

Core Objects (Salesforce Standard + Custom)

Use Accounts/Contacts for businesses and people. Add these custom objects:

- Jewelry_Item (SKU, item_type, metal, gemstone, weight, dimensions, cost_price, retail_price, warranty_period, photos)
- Inventory_Location (store, safe_box, vendor consignment)
- Sales_Order (status, order_date, total, payment_method, salesperson, items (child junction))
- Sales_Order_Line_Item (lookup to Jewelry_Item, qty, unit_price, discount)
- Repair_Request (customer, item, issue_description, estimated_cost, status, received_date, return_date)
- Appraisal_Record (item, appraiser, value, date, certificate_id, pdf_attachment)

- Consignment / Vendor (vendor details, consigned_items, commission_rate)
- Follow_Up (type, due_date, channel, outcome)
- Lifetime_Warranty or Service_Plan (if offering subscriptions)
- Transaction / Payment (for receipts, refunds, layaways)

Key Features & UX

- Item-level photos and gallery (use Files).
- Quick-sell UI: POS-style Lightning page with barcode/QR scan support.
- Hold / Layaway workflow with balance tracking.
- Repair intake form with service ticket automation.
- Prevent deletion of customer with active records.
- Duplicate review and merge.
- Appraisal certificate PDF generation.
- Mobile Lightning pages for staff.

Automation & Business Logic

- Validation rules for pricing and data integrity.
- Record-triggered flows for:
 - Inventory decrement on sales.
 - Auto follow-up creation on repair close.
 - Prevent delete if related records exist.
- Approval processes for discounts.
- Scheduled flows for reminders.
- Analytics for demand forecasting.

Reports & Dashboards

- Daily Sales by Store / Salesperson
- Top-selling SKUs by time range
- Inventory aging report
- Repair turnaround time dashboard
- High-value customer engagement report
- Consignment vendor performance dashboard
- Open holds/layaways view

Security & Sharing

- Profiles: Sales Associate, Store Manager, Appraiser, Finance, Admin.
- Permission Sets for cost-sensitive fields.
- Store-level data visibility via Sharing Rules.
- Field history tracking for critical values.

7) Integrations

- POS hardware (barcode, receipt printer)
- Payment gateways
- QuickBooks/Xero accounting sync
- SMS/Email notifications
- DocuSign for agreements
- CDN for images

Data Migration

- Clean SKUs and standardize fields.
- Import master data first, then customers, then order history.
- Use External IDs for upserts.

Implementation Roadmap (6 Sprints)

- Sprint 0: Discovery & Design
- Sprint 1: Core CRM & Inventory
- Sprint 2: Sales workflows & POS UI
- Sprint 3: Repairs & Appraisals
- Sprint 4: Automations & Dashboards
- Sprint 5: Integrations & Training
- Sprint 6: Go-live & Support

Delete Logic Example

Before-delete flow checks:

- Active Sales Orders
- Open Repair Requests
- Pending Follow Ups

If any exist → Show message and stop delete.