

Performance and Testing

Custom Object Creation:

We create five main custom objects for Jewel Customer, Item, Customer Order, Price, Billing.

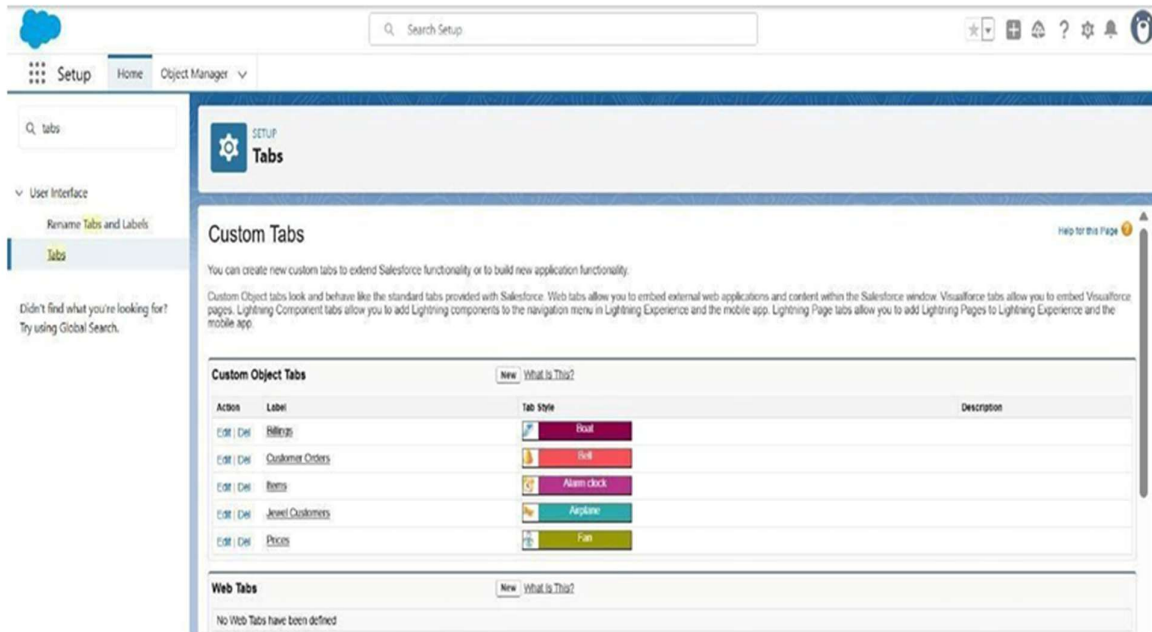
The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes a description field, API Name (Jewel_Customer__c), Custom checkbox (checked), Singular Label (Jewel Customer), Plural Label (Jewel Customers), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

Field	Value
Description	
API Name	Jewel_Customer__c
Custom	✓
Singular Label	Jewel Customer
Plural Label	Jewel Customers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The screenshot shows the Salesforce Setup interface for the 'Item' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Details' and includes a description field, API Name (Item__c), Custom checkbox (checked), Singular Label (Item), Plural Label (Items), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are in the top right.

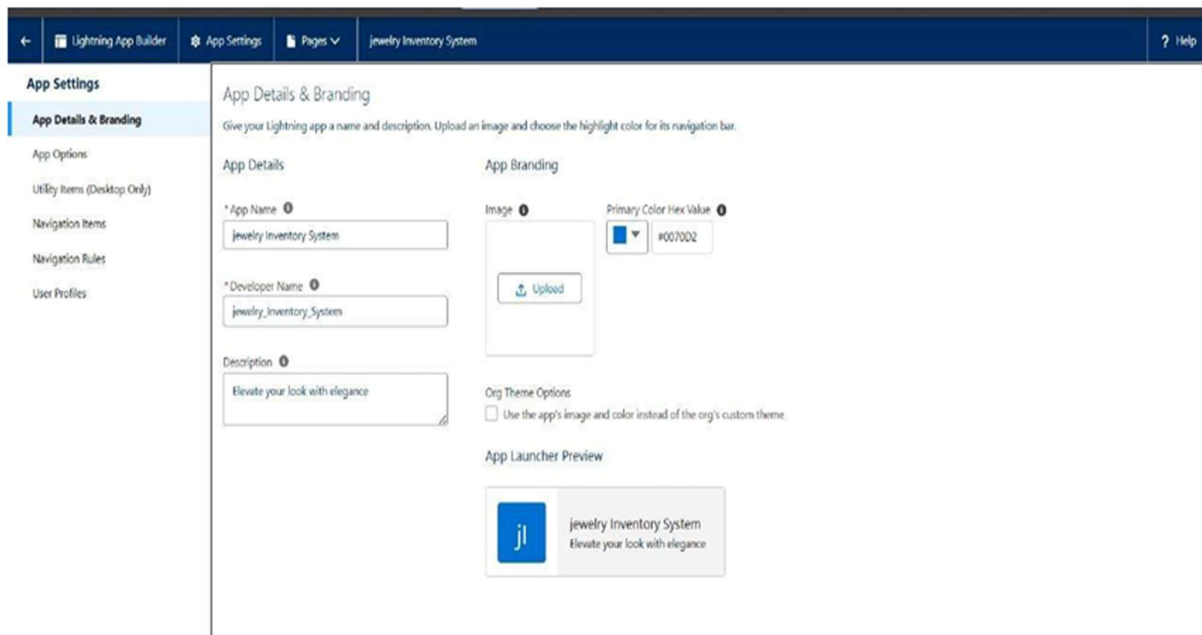
Field	Value
Description	
API Name	Item__c
Custom	✓
Singular Label	Item
Plural Label	Items
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

So we get the required all custom tabs as below

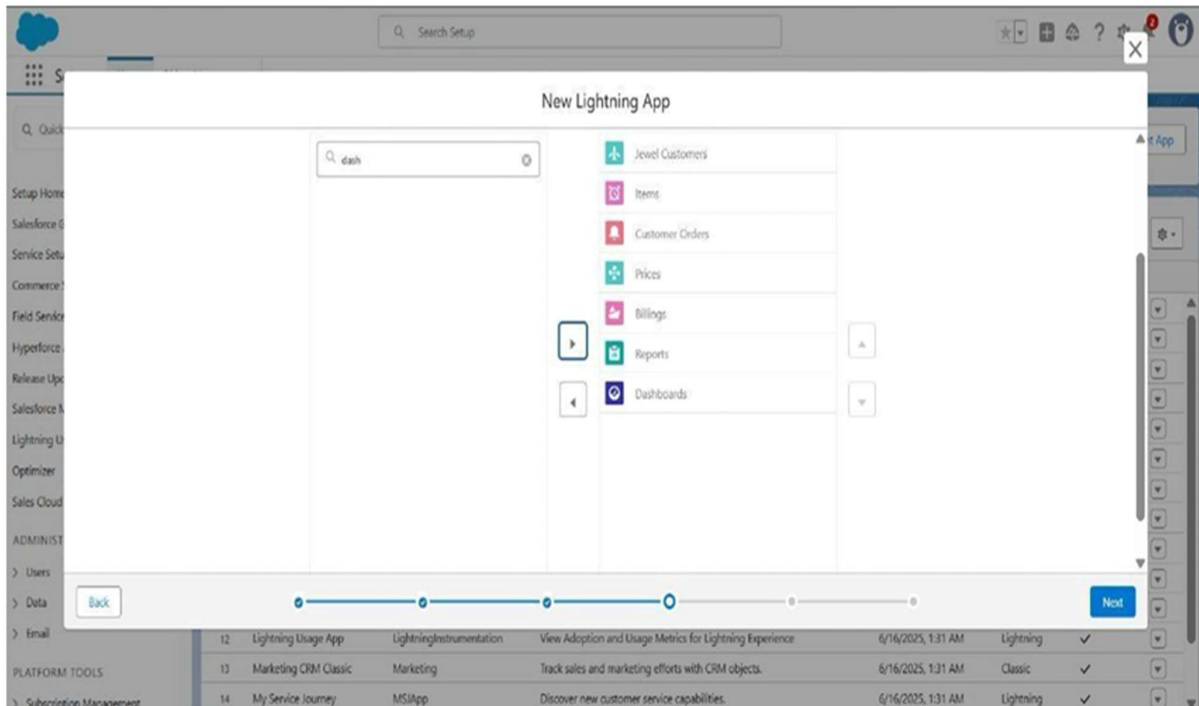


Creation of Lightning App:

App Name: Jewellery Inventory System



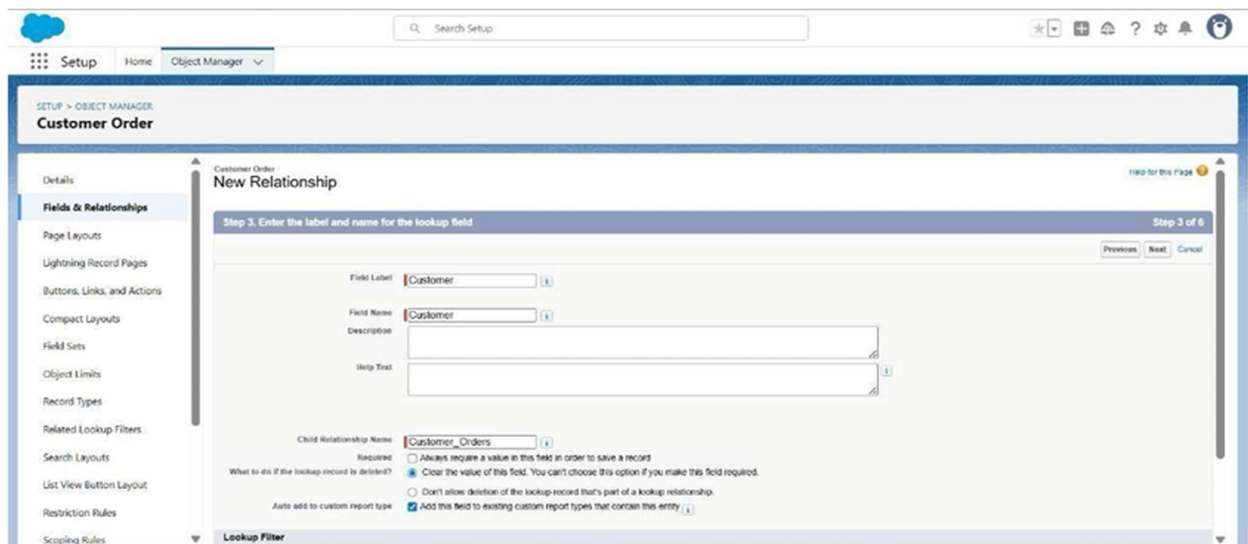
Navigation Items



Creation of Fields:

Creating lookup relationship

To Create a relationship between Jewel Customer & Customer Order Objects.



Setup Home Object Manager

Customer Order

Details

Fields & Relationships

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

Restriction Rules

Scoping Rules

New Relationship

Step 6. Add custom related lists

Field Label Item

Data Type Master Detail

Field Name Item

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label Customer Orders

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name

Item Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Creating Text Fields:

Setup Home Object Manager

Jewel Customer

Details

Fields & Relationships

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

Restriction Rules

Scoping Rules

New Custom Field

Step 2. Enter the details

Field Label City

Length 20

Field Name City

Description

Help Text

Required

Unique

External ID

Auto add to custom report type

Always require a value in this field in order to save a record

Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

Set this field as the unique record identifier from an external system

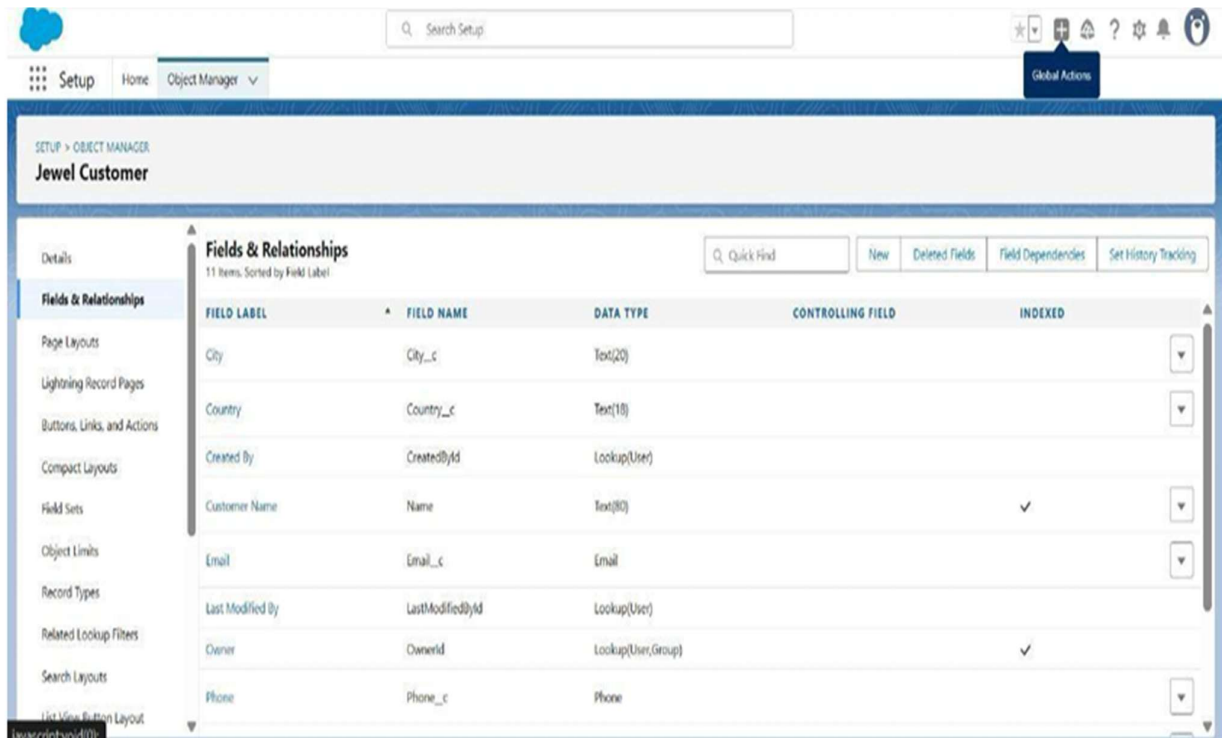
Add this field to existing custom report types that contain this entity

Previous Next Cancel

Creating Remaining Fields in Objects:

Creating remaining fields in the objects

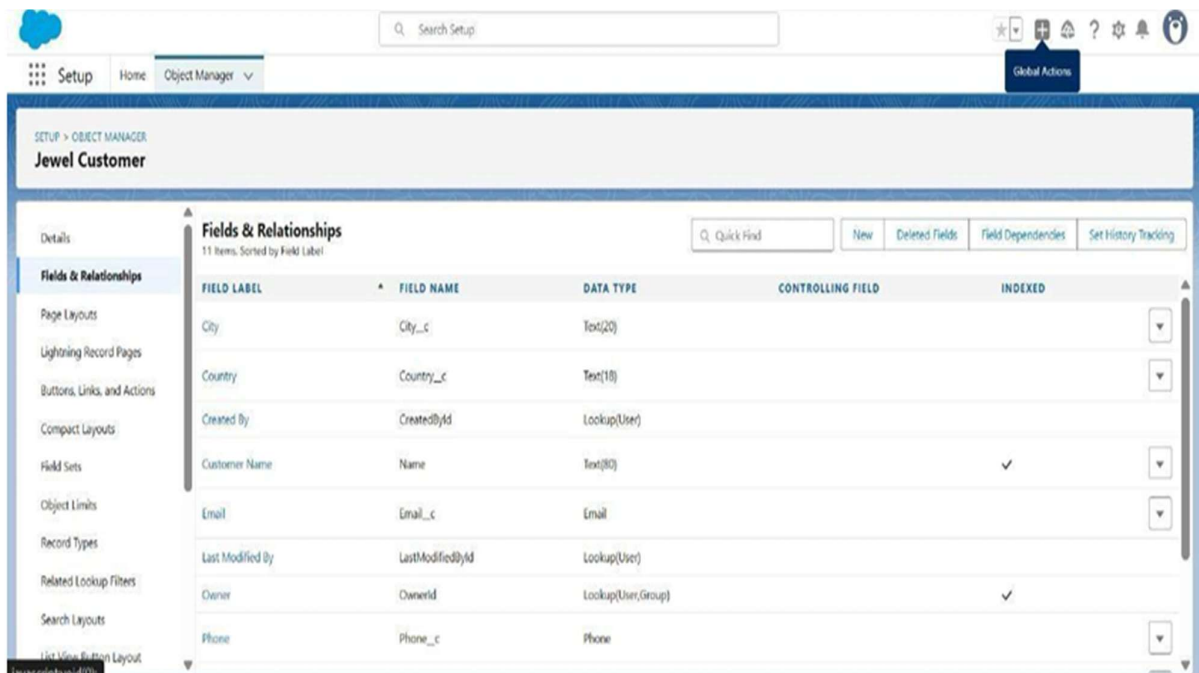
1. Jewel Customer : State, Street, Country, Zip/Postal code.



The screenshot shows the Salesforce Setup interface for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: City, Country, Created By, Customer Name, Email, Last Modified By, Owner, and Phone. The 'Indexed' column shows checkmarks for Customer Name and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

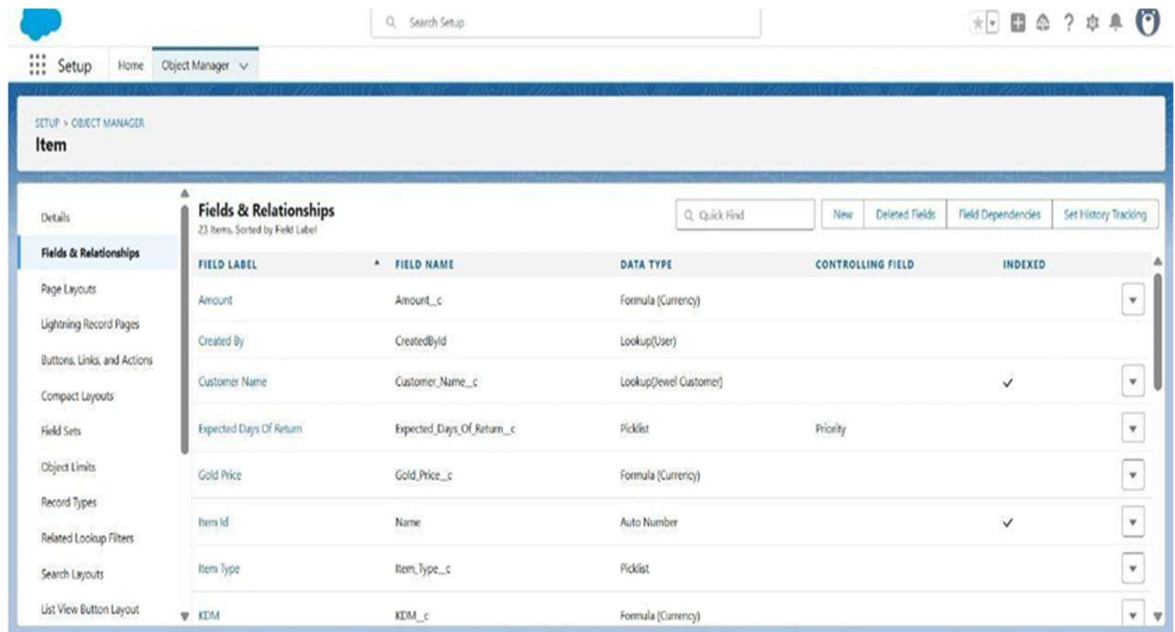
2. Price : Silver Price



This screenshot is identical to the one above, showing the Salesforce Setup interface for the 'Jewel Customer' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: City, Country, Created By, Customer Name, Email, Last Modified By, Owner, and Phone. The 'Indexed' column shows checkmarks for Customer Name and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Country	Country__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

3.Item : Field Label-Customer Name, Ornament, Weight, Stone Weight, Percentage, Stone/Other Price, Expected Days of Return, Priority, Silver Price, Purity Gold Price, Total weights, Amount, KDM, Making Charges.



Setup > OBJECT MANAGER
Item

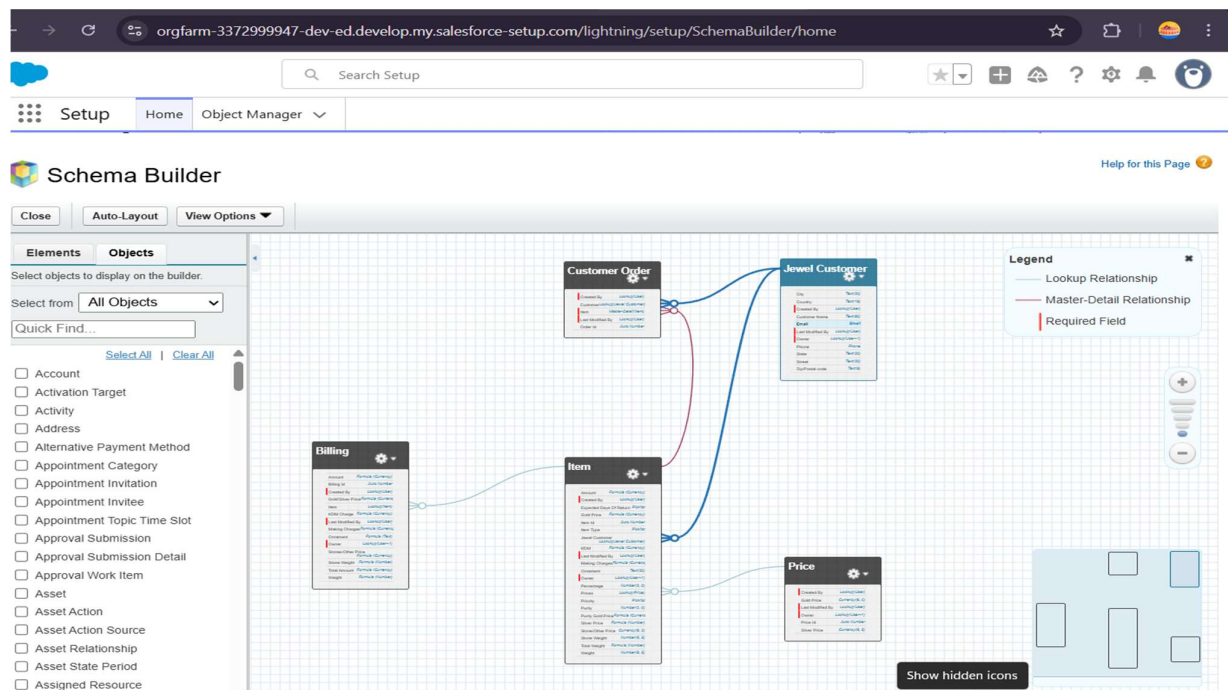
Details

Fields & Relationships
23 Items, Sorted by Field Label

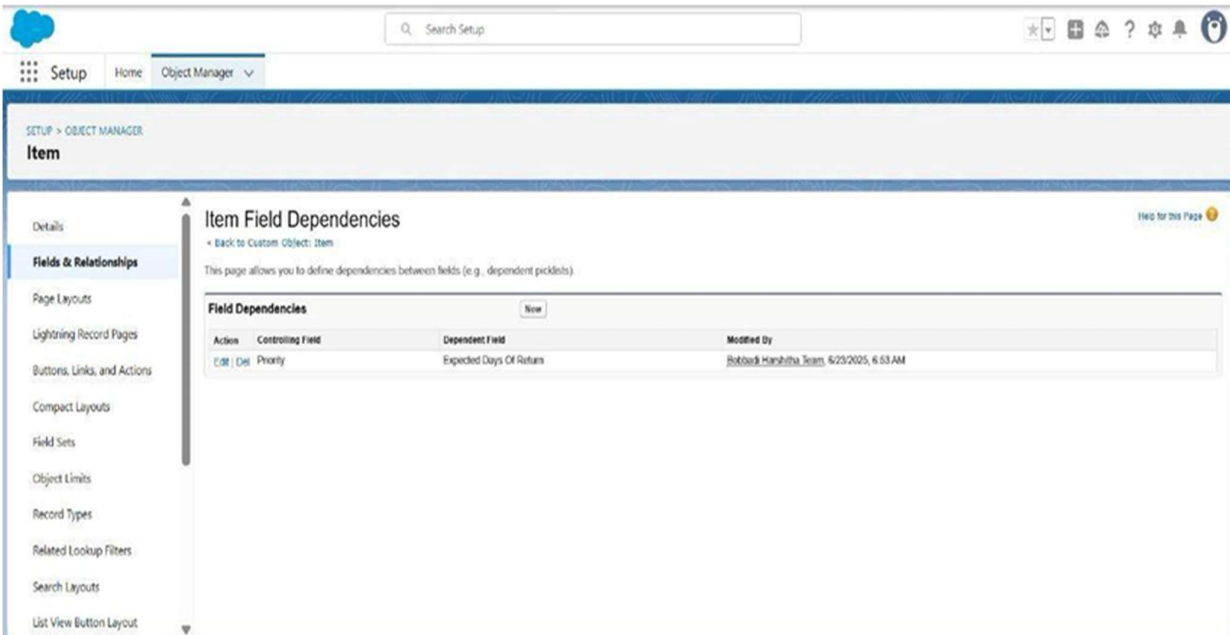
Q. Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Customer Name	Customer_Name_c	Lookup(Jewel Customer)		✓
Expected Days Of Return	Expected_Days_Of_Return_c	Picklist	Priority	
Gold Price	Gold_Price_c	Formula (Currency)		
Item Id	Name	Auto Number		✓
Item Type	Item_Type_c	Picklist		
KDM	KDM_c	Formula (Currency)		

Creation of Schema Builder:

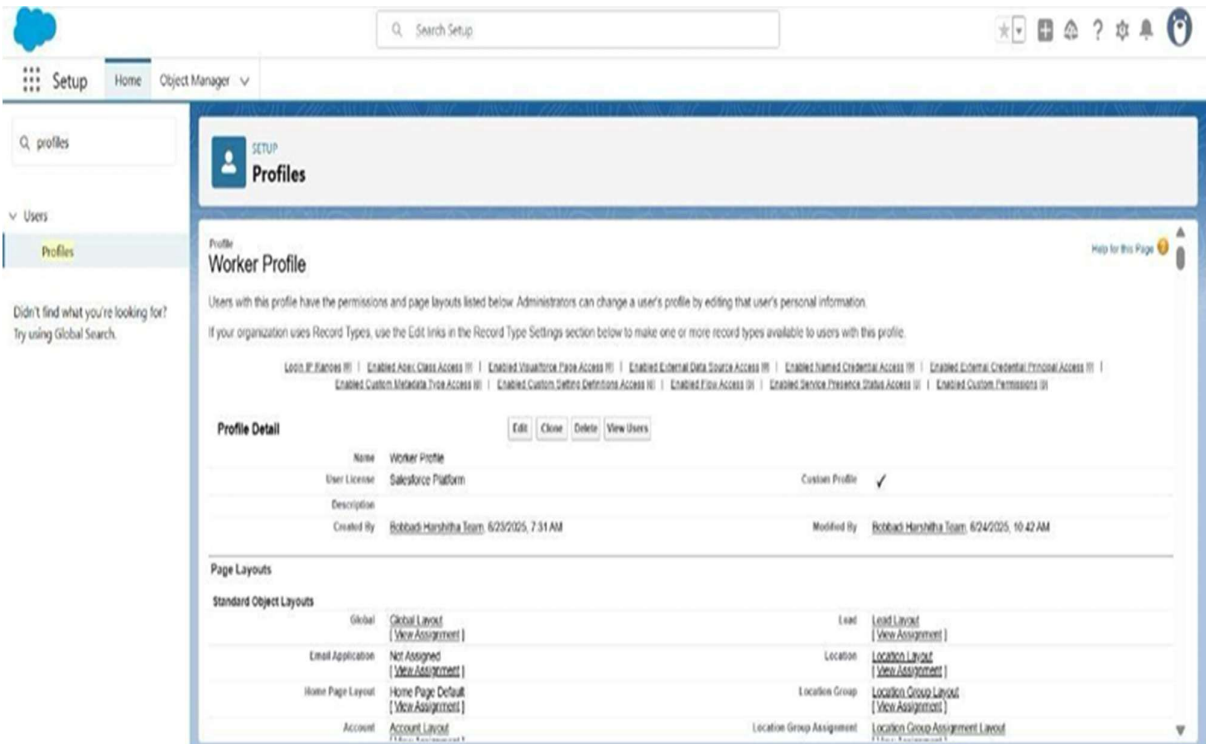


Creation of Field Dependencies:



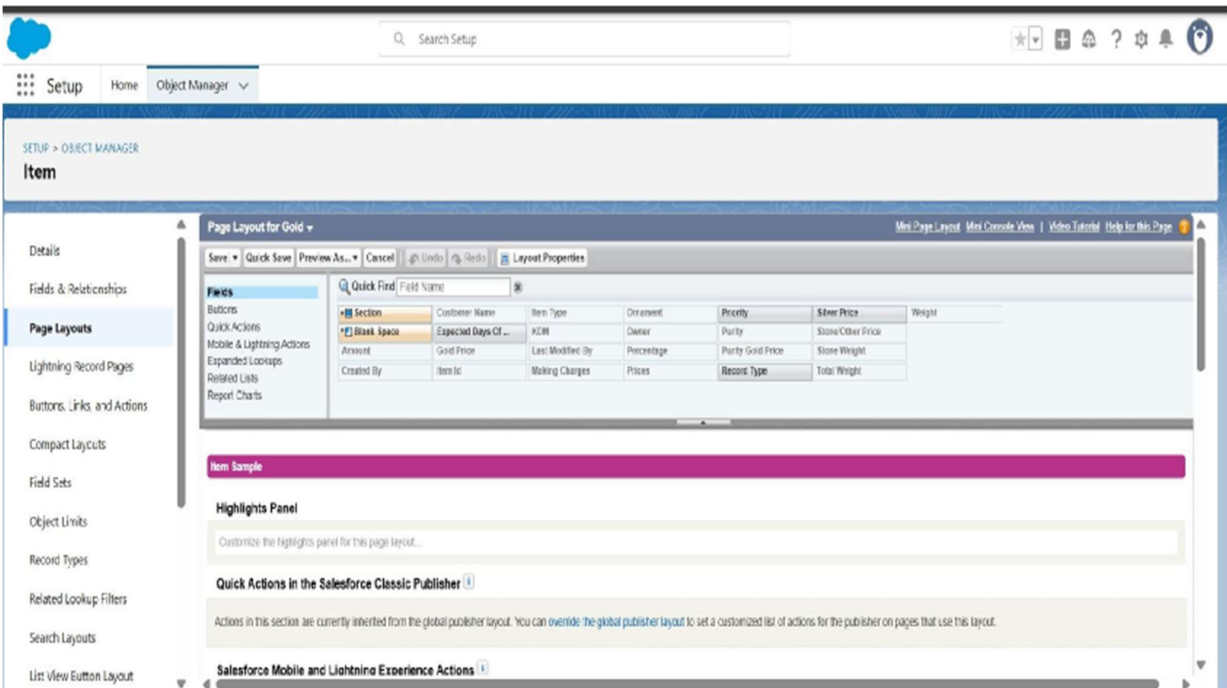
Creation of Profiles:

We create the goldsmith profile and the worker profile

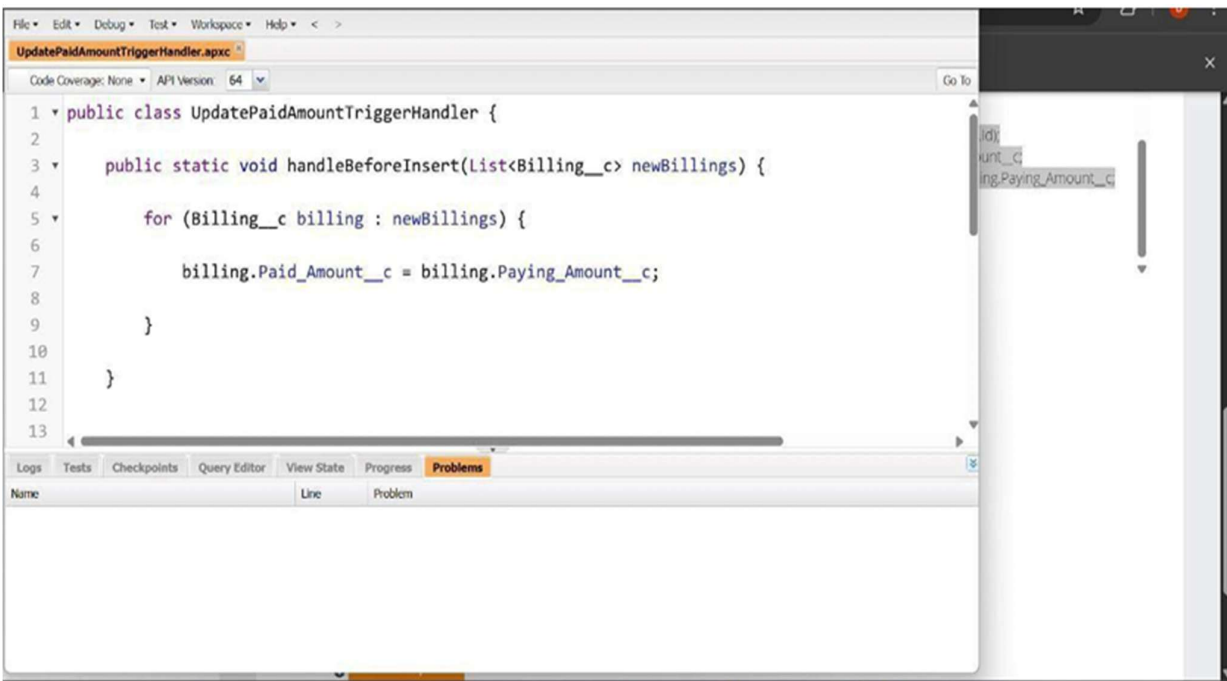


Creation of Page Layouts:

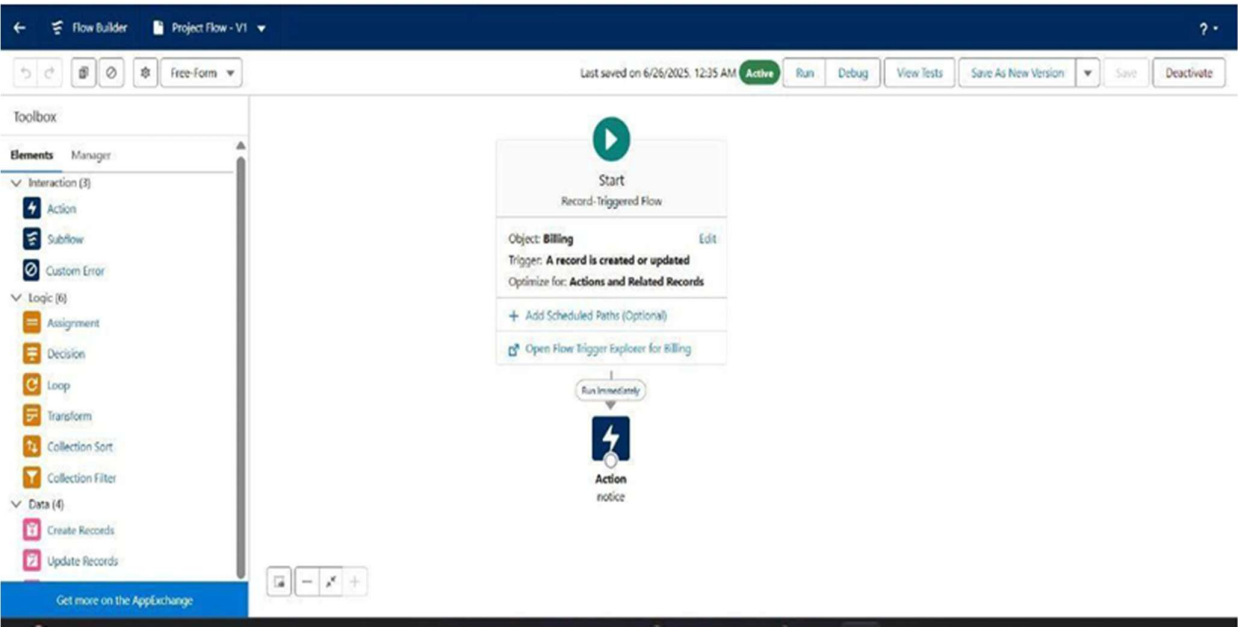
We create the page layouts for gold and silver items



Creation of Trigger:

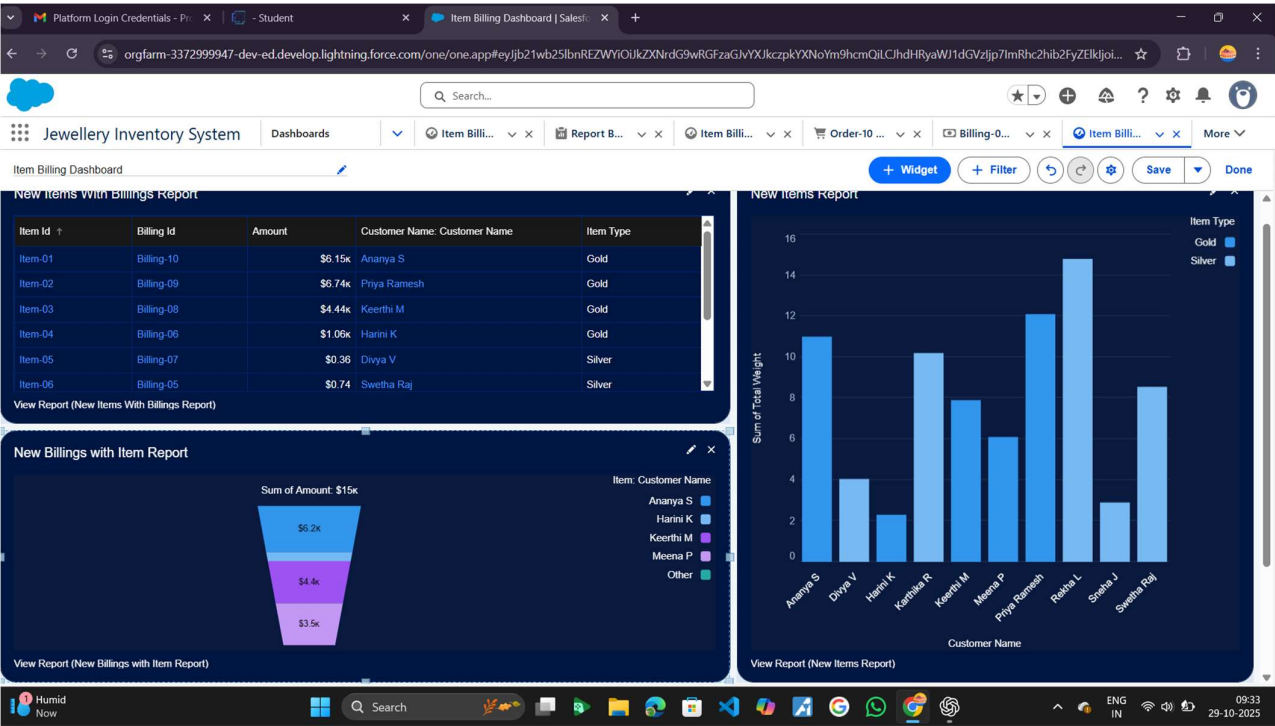


Creation of Flows:



Performance Observations (Phase Testing) for Dashboard:

Dashboard-1:



Dashboard-1 Testing Summary

1. Accurate Data Display:

All charts (donut, bar, funnel) show real-time and correct values for Gold and Silver items.

2. Working Reports:

“View Report” links open detailed Salesforce reports, confirming proper backend connection.

3. Clear Price Segments:

Funnel chart correctly shows price ranges (₹5k–₹76k) with accurate total values.

4. Stable UI:

Dashboard loads quickly and runs smoothly with no errors or delays.

5. Balanced Data:

Bar chart confirms equal Gold and Silver billing entries (5 each).

6. Test Results:

No missing data or incorrect values found — dashboard ready for review and UAT.

Project Objectives (Jewellery Inventory System - Salesforce CRM)

1. Improve Inventory & Billing Accuracy:

Track jewellery items and billing in real time to reduce manual errors.

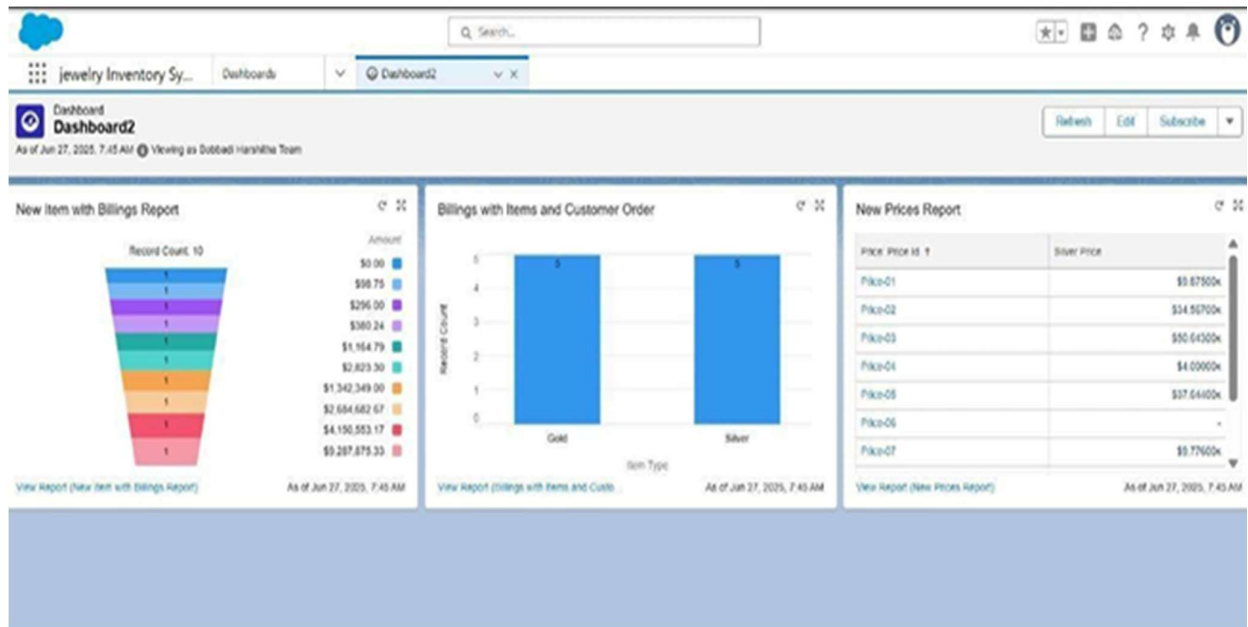
2. Enhance Customer Order Management:

Link jewellery items to customer orders for faster and more accurate service.

3. Support Data-Driven Decisions:

Use dashboards and reports to analyze trends and improve pricing and inventory planning.

Dashboard-2:



Performance Observations – Dashboard-2

1. New Item with Billings Report:

10 billed items found, ranging from \$0.00 to \$9,287,875.33. One zero-value entry suggests a data error or free item.

2. Billings by Item Type:

Gold and Silver each have 5 records — showing balanced and accurate item categorization.

3. New Prices Report:

Some items (e.g., Price-03, Price-05) have high

values, while others (like Price-06) lack price data, requiring validation.

Project Objectives – Jewellery Inventory Management (Dashboard-2)

1. Track New Items with Billing:

Monitor new jewellery items and their billing values, including unusual or zero-value entries.

2. Analyze Orders by Item Type:

Compare billing trends between Gold and Silver items for better customer insights.

3. Monitor and Update Prices:

Review current jewellery prices to ensure accuracy and alignment with market rates.

The performance testing phase successfully validated the core functionalities of the Jewellery Inventory Management System, including customer record creation, item billing, inventory tracking, and dashboard visualization. The system demonstrated strong accuracy and reliability, maintaining real-time synchronization between items and billing modules. Validation rules and automation flows effectively ensured data integrity and prevented duplicate or incorrect entries. Overall, the testing confirmed that the CRM solution is stable, efficient, and production-ready—meeting all business objectives for accuracy, performance, and user satisfaction.