

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 with the 'Object Manager' selected. A new object named 'Jewel Customer' is being created. The 'Details' tab is selected, showing the following configuration:

Setting	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 left sidebar lists various configuration options for the object: 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 screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Item' is being created. The 'Details' tab is selected, showing the following configuration:

Setting	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

The left sidebar lists various configuration options for the object: 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.

So we get the required all custom tabs as below

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected under 'Customize' > 'User Interface'. The page title is 'Custom Tabs'. It includes a brief description of what custom tabs are and how they can be used. Below this, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section lists several tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	Riflos	Boat	
Edit Del	Customer Orders	Ball	
Edit Del	Items	Alarm clock	
Edit Del	Jewel Customers	Airplane	
Edit Del	Prices	Fan	

The 'Web Tabs' section shows a message: 'No Web Tabs have been defined'.

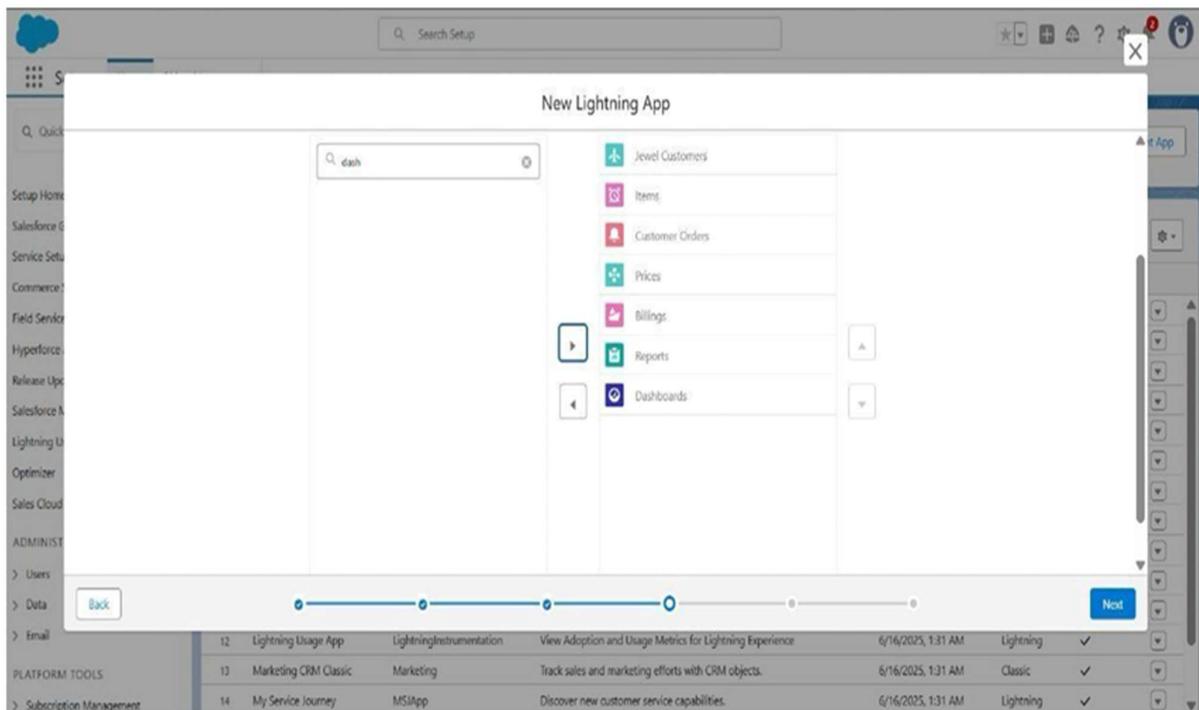
Creation of Lightning App:

App Name: Jewellery Inventory System

The screenshot shows the Lightning App Builder interface with the 'App Details & Branding' tab selected. The left sidebar shows other tabs like 'App Settings', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', 'Navigation Rules', and 'User Profiles'. The main area displays the app's details and branding options:

- App Details**: Fields for 'App Name' (Jewelry Inventory System) and 'Developer Name' (jewelry.Inventory.System).
- App Branding**: Fields for 'Image' (Upload button), 'Primary Color Hex Value' (#007002), and 'Org Theme Options' (checkbox for using the app's image and color instead of the org's custom theme).
- Description**: A text input field containing 'Elevate your look with elegance'.
- App Launcher Preview**: A preview window showing the app icon (a blue square with 'jl') and the app name 'jewelry Inventory System' with the description 'Elevate your look with elegance'.

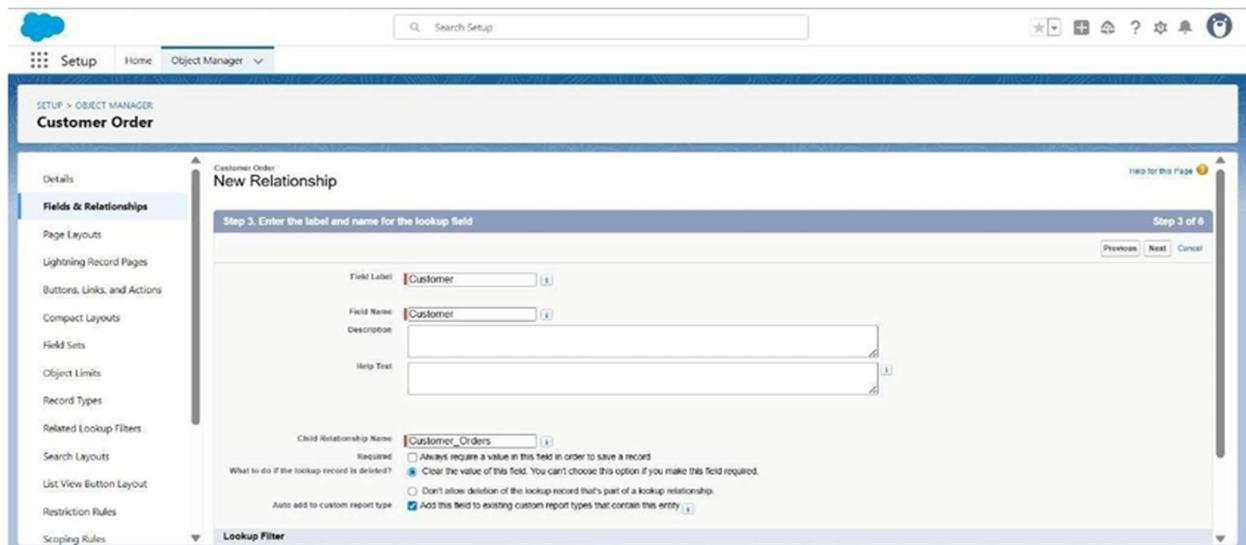
Navigation Items



Creation of Fields:

Creating lookup relationship

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



The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: Customer Order

Fields & Relationships

New Relationship

Step 6. Add custom related lists

Field Label: Item
Data Type: Master-Detail
Field Name: Item
Description: (empty)

Related List Label: Customer Orders

Add Related List: Page Layout Name
 Item Layout

Append related list to users' existing personal customizations

Buttons: Previous, Save & New, Save, Cancel

Creating Text Fields:

The screenshot shows the Salesforce Setup interface with the following details:

Object Manager: Jewel Customer

Fields & Relationships

New Custom Field

Step 2. Enter the details

Field Label: City
Length: 20
Field Name: City
Description: (empty)
Help Text: (empty)

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

Unique: Do not allow duplicate values
 Treat "ABC" and "abc" as duplicate values (case insensitive)
 Treat "ABC" and "abc" as different values (case sensitive)

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

Auto add to custom report type: Add this field to existing custom report types that contain this entry

Buttons: 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 Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and 'Global Actions'. The main title is 'Jewel Customer'. On the left, a sidebar lists various configuration options: 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 central area is titled 'Fields & Relationships' and displays a table of 11 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Country	Country_c	Text(10)		
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 'Fields & Relationships' page for the 'Jewel Customer' object. The table displays the same 11 items and their details, including the newly added 'Country' field. The 'INDEXED' column shows checkmarks for 'Customer Name', 'Owner', and 'Indexed'.

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.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	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:

The Schema Builder interface displays the following elements:

- Elements Tab:** Shows a list of available objects: Account, Activation Target, Activity, Address, Alternative Payment Method, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource.
- Objects Tab:** Shows the selected objects: Customer Order, Jewel Customer, Item, and Price.
- Diagram Area:** Shows the relationships between the objects. Customer Order has a blue line (Master-Detail) to Jewel Customer. Item has a blue line (Master-Detail) to Price. There are also red lines (Required Field) from Customer Order to its fields and from Item to its fields.
- Legend:**
 - Blue line: Lookup Relationship
 - Red line: Master-Detail Relationship
 - Red line with a vertical bar: Required Field
- Show hidden icons:** A button in the bottom right corner.

Creation of Field Dependencies:

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup" and various navigation icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Page Title:** Item
- Left Sidebar:** Fields & Relationships (selected), followed by 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.
- Main Content:**
 - Section Header:** Item Field Dependencies < Back to Custom Object: Item
 - Description:** This page allows you to define dependencies between fields (e.g., dependent picklists).
 - Table:** Field Dependencies

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Priority	Expected Days Of Return	Robbabi Harsihha Team, 6/23/2025, 6:53 AM

Creation of Profiles:

We create the goldsmith profile and the worker profile

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup" and various navigation icons.
- Breadcrumbs:** SETUP > Profiles
- Page Title:** Worker Profile
- Left Sidebar:** Users (selected), followed by Profiles.
- Main Content:**
 - Section Header:** Profile Worker Profile
 - Description:** Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
 - Permissions:** A long list of permissions including Lead.Edit, Enabled, Admin, Client, Access, Enabled, Volunteer, Case, Page, Access, Enabled, External, Data, Source, Access, Enabled, Named, Credential, Access, Enabled, External, Credential, Credential, Access, Enabled, Custom, Metadata, Access, Enabled, Custom, Setting, Definition, Access, Enabled, Email, Access, Enabled, Device, Preference, Status, Access, Enabled, Custom, Extension, Access.
 - Profile Detail:**

Name	Worker Profile	Custom Profile
User License	Salesforce Platform	✓
Description		
Created By	Robbabi Harsihha Team, 6/23/2025, 7:31 AM	Modified By Robbabi Harsihha Team, 6/24/2025, 10:42 AM
 - Page Layouts:** Standard Object Layouts table

Creation of Page Layouts:

We create the page layouts for gold and silver items

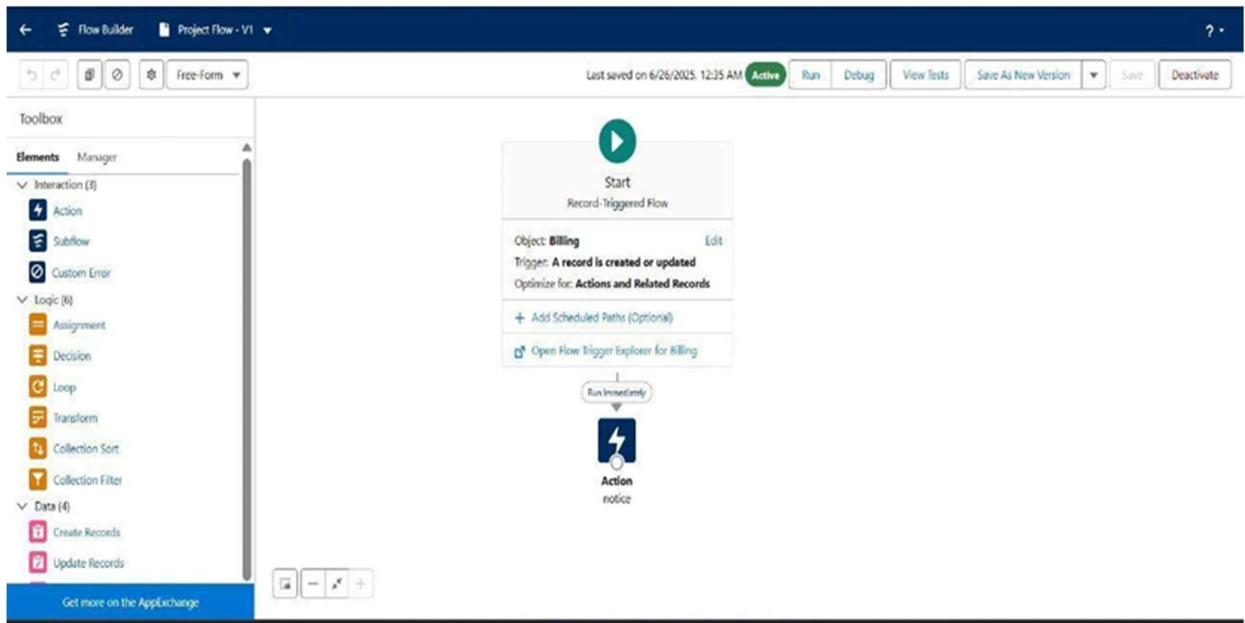
The screenshot shows the Salesforce Setup interface for creating a Page Layout. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main area is titled "Page Layout for Gold". It contains a "Fields" section with a table showing fields like Container Name, Item Type, Onement, Priority, Silver Price, Weight, and others. Below this are sections for "Item Sample", "Highlights Panel", "Quick Actions in the Salesforce Classic Publisher", and "Salesforce Mobile and Lightning Experience Actions".

Creation of Trigger:

The screenshot shows the Salesforce Developer Console with the file "UpdatePaidAmountTriggerHandler.apxc" open. The code defines a public class "UpdatePaidAmountTriggerHandler" with a static void method "handleBeforeInsert" that iterates through a list of Billing__c records and updates the Paid_Amount__c field to match the Paying_Amount__c field. The right side of the screen shows a code editor with the same code and a preview pane showing the results of the code execution.

```
1 public class UpdatePaidAmountTriggerHandler {
2
3     public static void handleBeforeInsert(List<Billing__c> newBillings) {
4
5         for (Billing__c billing : newBillings) {
6
7             billing.Paid_Amount__c = billing.Paying_Amount__c;
8
9         }
10    }
11 }
```

Creation of Flows:



Performance Observations (Phase Testing) for Dashboard:

Dashboard-1:

The screenshot shows the Item Billing Dashboard in the Salesforce Platform. The dashboard includes the following components:

- New Items With Billings Report:** A table showing new items with their corresponding billings. The data is as follows:

Item Id	Billing Id	Amount	Customer Name	Item Type
Item-01	Billing-10	\$6.15k	Ananya S	Gold
Item-02	Billing-09	\$6.74k	Priya Ramesh	Gold
Item-03	Billing-08	\$4.44k	Keerthi M	Gold
Item-04	Billing-06	\$1.06k	Harini K	Gold
Item-05	Billing-07	\$0.36k	Divya V	Silver
Item-06	Billing-05	\$0.74k	Swetha Raj	Silver

- New Billings with Item Report:** A funnel chart showing the sum of amounts for different items. The data is as follows:

Item	Sum of Amount
Sum of Amount: \$15k	\$6.2k
	\$4.4k
	\$3.5k

- New Items Report:** A bar chart comparing the sum of total weight for Gold and Silver items across various customers. The data is as follows:

Customer Name	Item Type	Sum of Total Weight
Ananya S	Gold	11.5
Divya V	Gold	4.0
Harini K	Gold	2.0
Karthika R	Gold	10.5
Keerthi M	Gold	8.0
Meena P	Gold	6.0
Priya Ramesh	Gold	12.5
Rakha L	Gold	15.0
Sneha J	Gold	2.0
Swetha Raj	Gold	8.5

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.

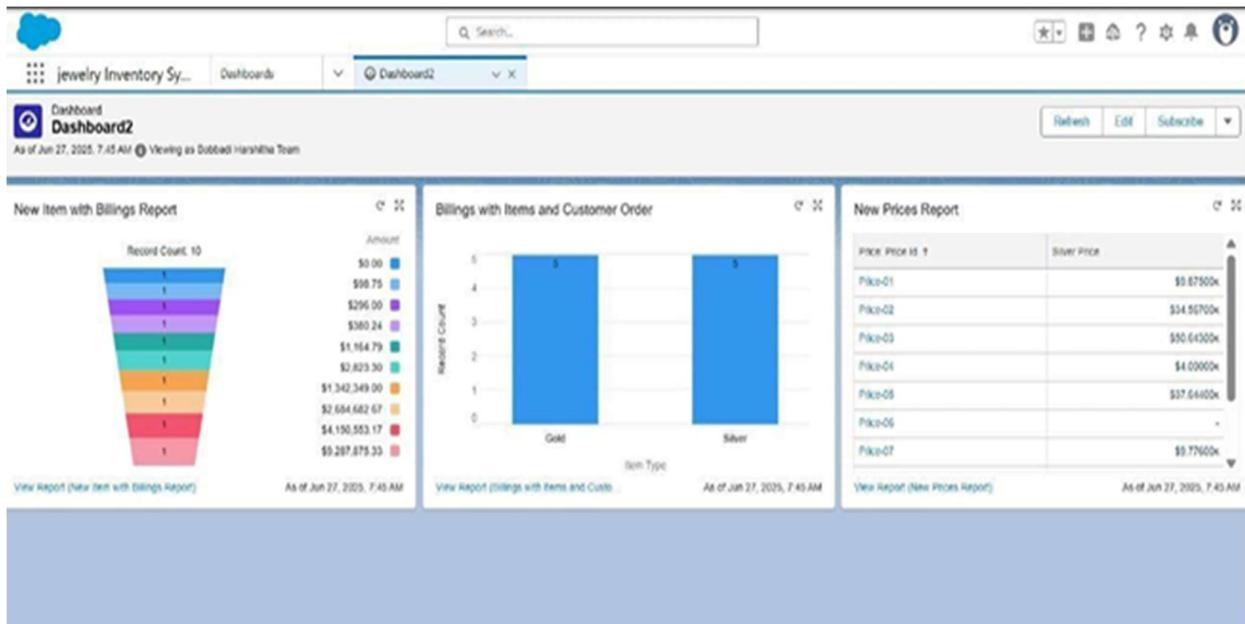
2. Enhance Customer Order Management:

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.