

## Performance and Testing

Date	30 October 2025
Team ID	NM2025TMID06238
Project Name	CRM Application for Jewel Management
Maximum Marks	4 Marks

### Model Performance Testing

#### Salesforce Developer Edition Signup Page

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First name: Sarulekha ✓ Last name: M ✓

Job title: Developer ✓ Work email: m.sarulekha@gm ✓

Company: sri bharathi engine ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☐ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org,

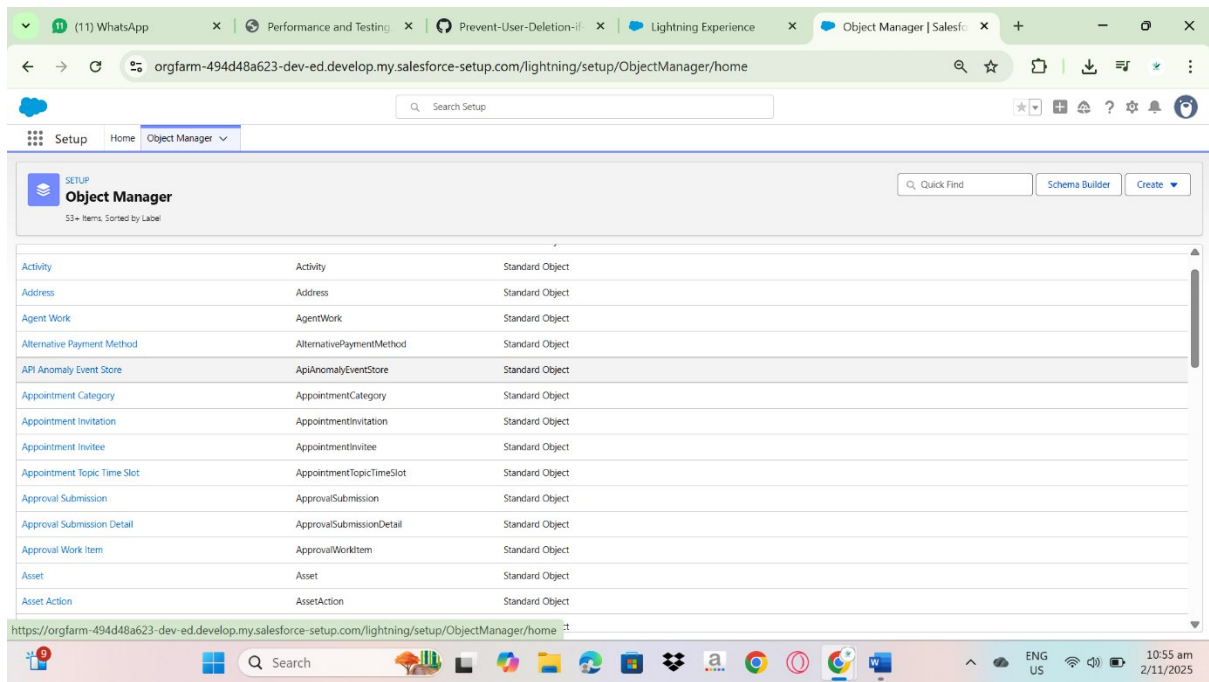
#### Parameter Value

**Objective** To create a Salesforce Developer Edition environment for building the CRM Application for Jewel Management.

**Description** The Developer Edition provides a personal Salesforce environment with full access to customization, automation tools, and CRM functionalities. It allows creating custom objects for managing customers, jewelry items, orders, and billing.

**Tool Used** Salesforce Developer Edition

#### Custom Tabs Setup



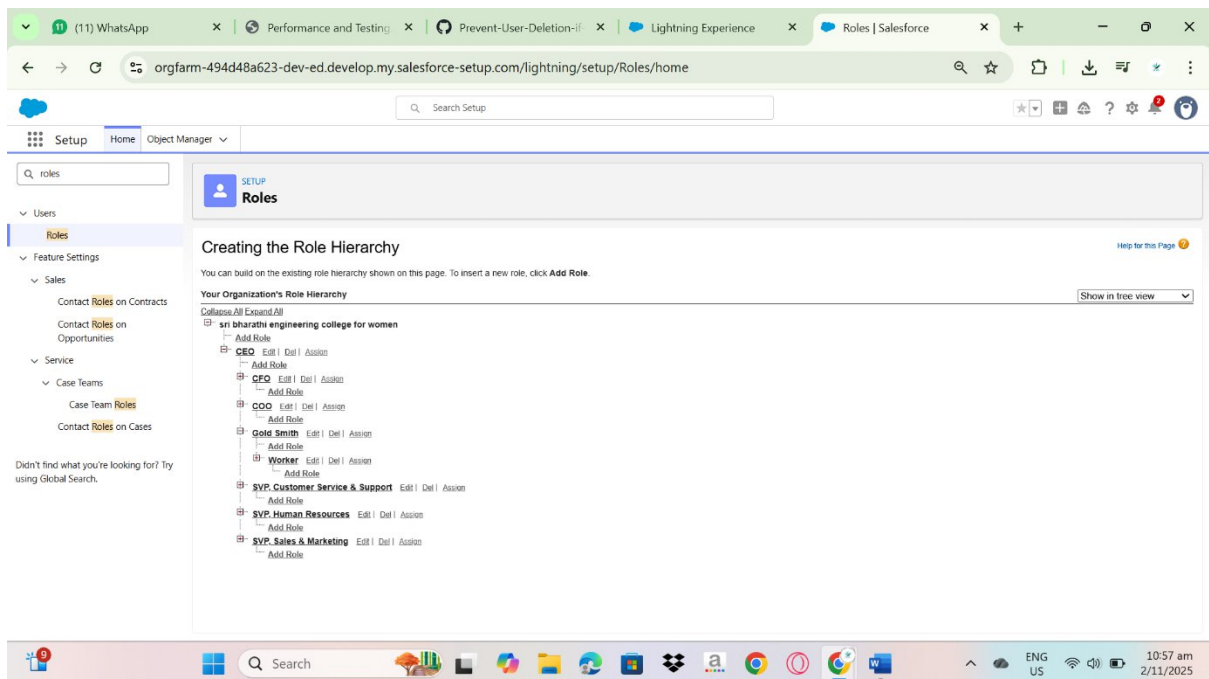
## Parameter Value

**Objective** To define and organize main custom objects for the Jewel Management CRM System.

**Description** Tabs were created for custom objects such as *Customers*, *Jewelry Items*, *Orders*, and *Billings* to streamline navigation and data management.

**Tool Used** Salesforce Object Manager → Tabs

## Roles Setup



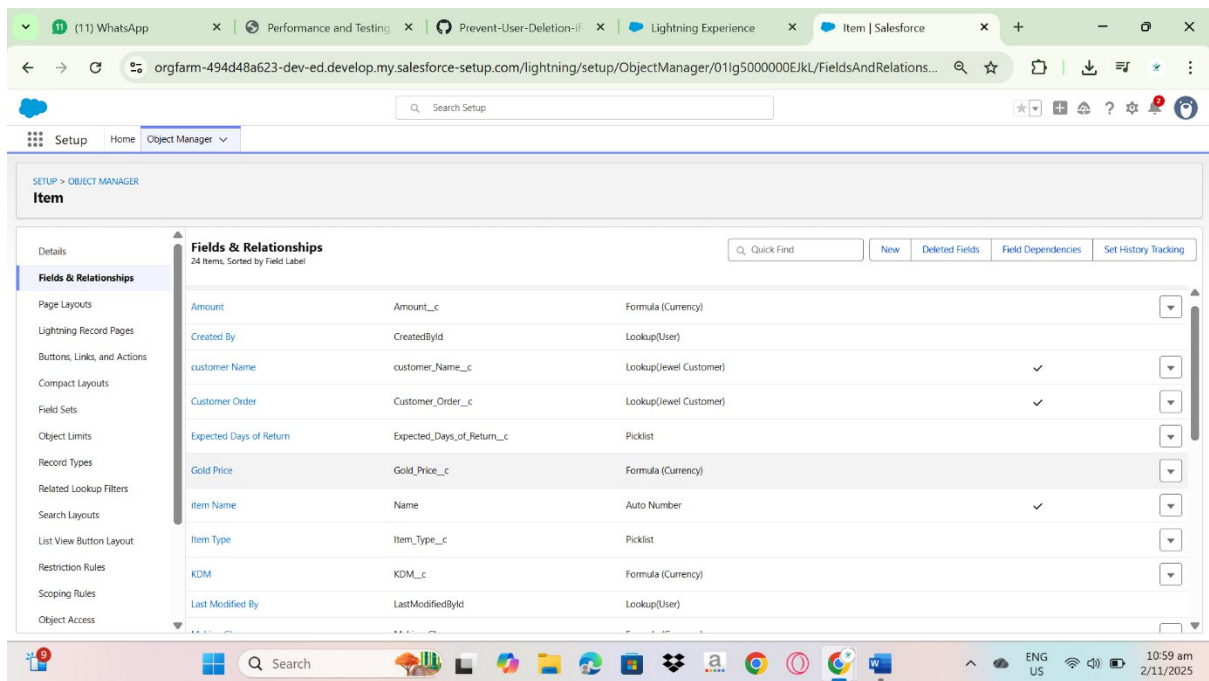
**Parameter** Value

**Objective** To implement a role hierarchy for managing data access and visibility across the jewelry store.

**Description** Roles were assigned, such as *Sales Executive*, *Store Manager*, and *Administrator*, ensuring secure access and accountability for customer and billing records.

**Tool Used** Salesforce Setup → Roles

## Jewelry Item Object Fields & Relationships



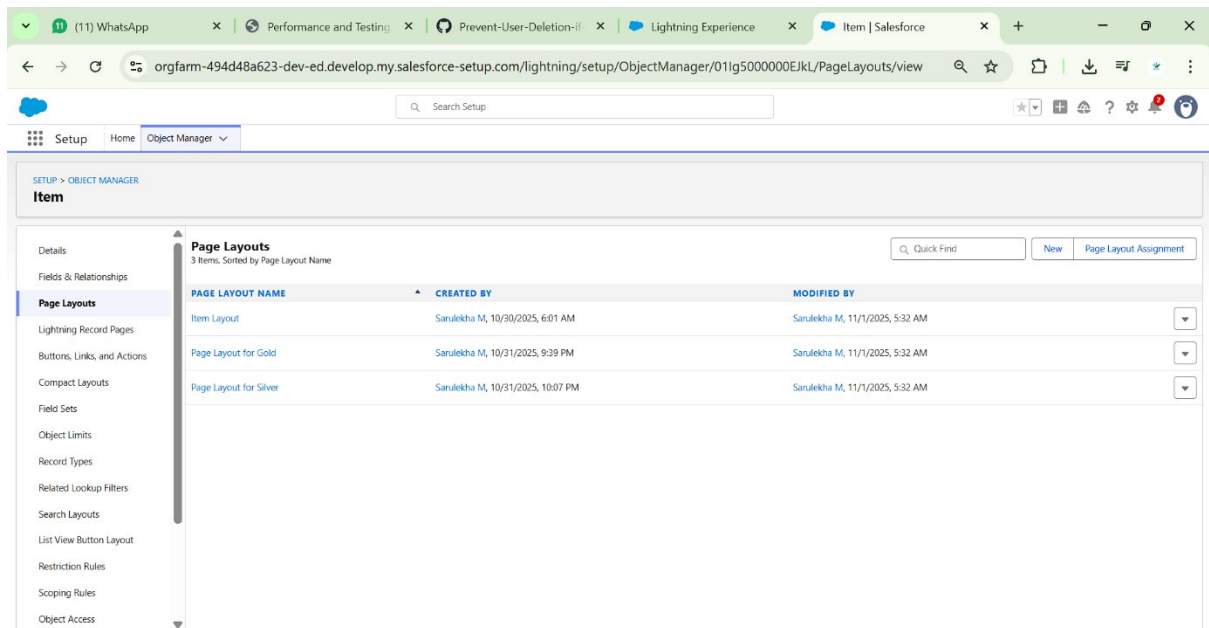
**Parameter** Value

**Objective** To define key fields that store jewelry item details and maintain data relationships with customers and billing.

**Description** Custom fields such as *Item ID*, *Item Name*, *Category (Gold/Silver/Diamond)*, *Price*, and *Stock Quantity* were created. Lookup relationships were established with *Orders* and *Billings*.

**Tool Used** Salesforce Object Manager → Item → Fields & Relationships

## Item Page Layout Design



**Parameter** Value

**Objective** To organize fields visually for better user interaction and clarity.

**Description** The *Item Layout* includes fields such as *Item ID*, *Item Name*, *Price*, *Stock Quantity*, and *Customer Order Reference*. The layout improves visibility and user efficiency.

**Tool Used** Salesforce Object Manager → Item → Page Layouts

## Flow Builder (Automated Email Notification Flow)

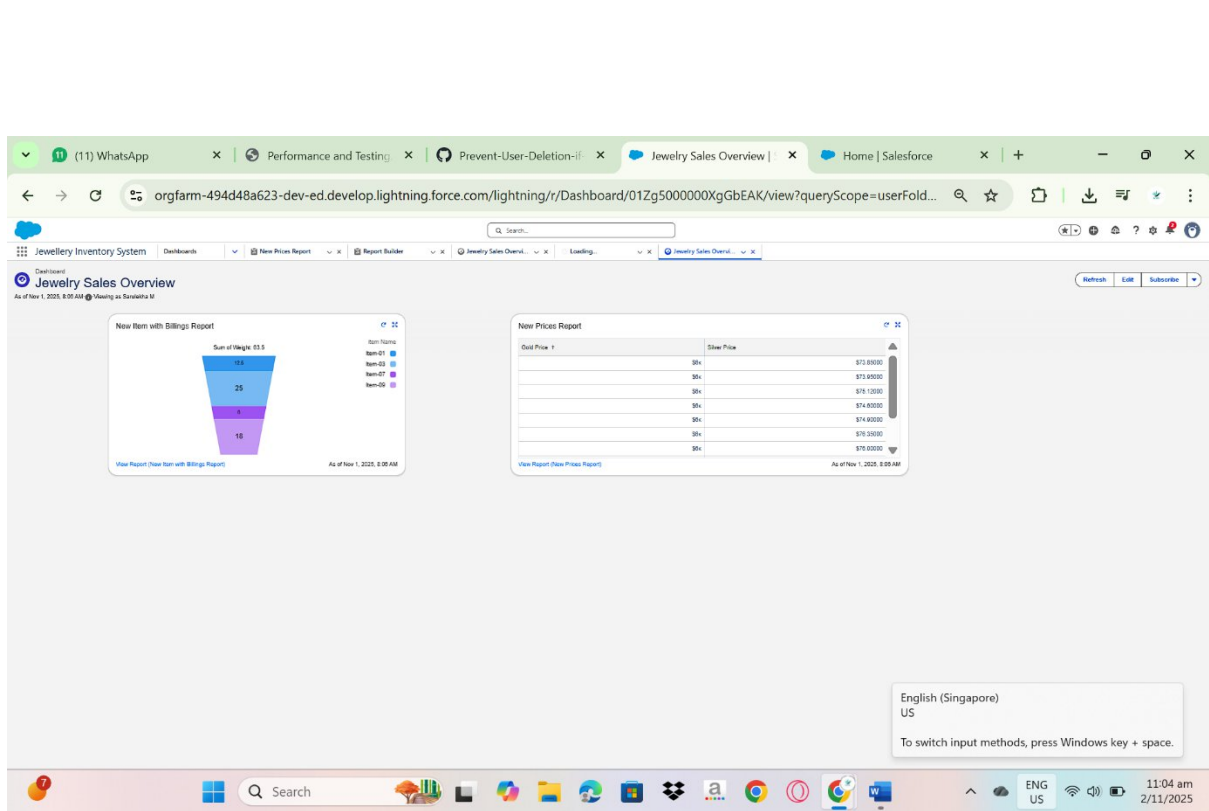
**Parameter** Value

**Objective** To automate email notifications when a new customer order or billing record is created.

**Description** A record-triggered flow was created to automatically send a welcome or billing confirmation email to the customer when a new record is added in Salesforce.

**Tool Used** Salesforce Flow Builder

## CRM Dashboard



**Parameter** Value

**Objective** To visualize and monitor customer, order, and billing data in real-time.

**Description** A Salesforce dashboard was designed to display *total sales*, *most purchased jewelry categories*, *top customers*, and *monthly billing reports*.

**Tool Used** Salesforce Dashboard & Reports