

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

The screenshot shows a web browser window with multiple tabs open at the top. The active tab is titled "Developer Edition". The main content area displays the "Sign up for your Developer Edition" form. The form fields include "First name" (Sarulekha), "Last name" (M), "Job title" (Developer), "Work email" (m.sarulekha@gmail.com), "Company" (sri bharathi engin.), and "Country/Region" (India). Below the form, a note states: "Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure." At the bottom, there is a checkbox for agreeing to the "Main Services Agreement – Developer Services and Salesforce Program Agreement" and a link to "Developer Documentation".

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

The screenshot shows the Salesforce Object Manager page. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main content area displays a table of standard objects, each with a name, label, and object type. The table has columns for Name, Label, and Type. The objects listed include Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, Asset, and Asset Action. All objects are categorized as Standard Object.

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

The screenshot shows the Salesforce Roles setup page. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main content area displays a table titled "Creating the Role Hierarchy". It shows a hierarchical structure of roles under "Your Organization's Role Hierarchy". The hierarchy starts with "sri bhanu engineering college for women", which contains "CEO", "COO", "Gold Smith", "Worker", "SVP.Customer.Service & Support", "SVP.Human.Resources", and "SVP.Sales & Marketing". Each role has "Edit | Del | Assign" options. A sidebar on the left shows a tree view of users, sales, service, and case teams, with "Roles" selected. A message at the bottom encourages using global search.

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main area displays the 'Item' object's details, specifically the 'Fields & Relationships' section. This section lists 24 items, sorted by Field Label. Each item has a name, a formula or type, and a description. For example, 'Amount' is a formula (Currency) field, 'Created By' is a lookup (User) field, and 'Customer Order' is a lookup (Jewel Customer) field. The interface also features a sidebar with various configuration options like Page Layouts, Lightning Record Pages, and Field Sets.

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for WhatsApp, Performance and Testing, Prevent-User-Deletion, Lightning Experience, and Item | Salesforce. The main area is titled 'Item' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories 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, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The right pane displays a table titled 'Page Layouts' with three items: 'Item Layout' (created by Sarulekha M on 10/30/2025 at 6:01 AM), 'Page Layout for Gold' (created by Sarulekha M on 10/31/2025 at 9:39 PM), and 'Page Layout for Silver' (created by Sarulekha M on 10/31/2025 at 10:07 PM). There are also 'Quick Find', 'New', and 'Page Layout Assignment' buttons at the top of the table.

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)

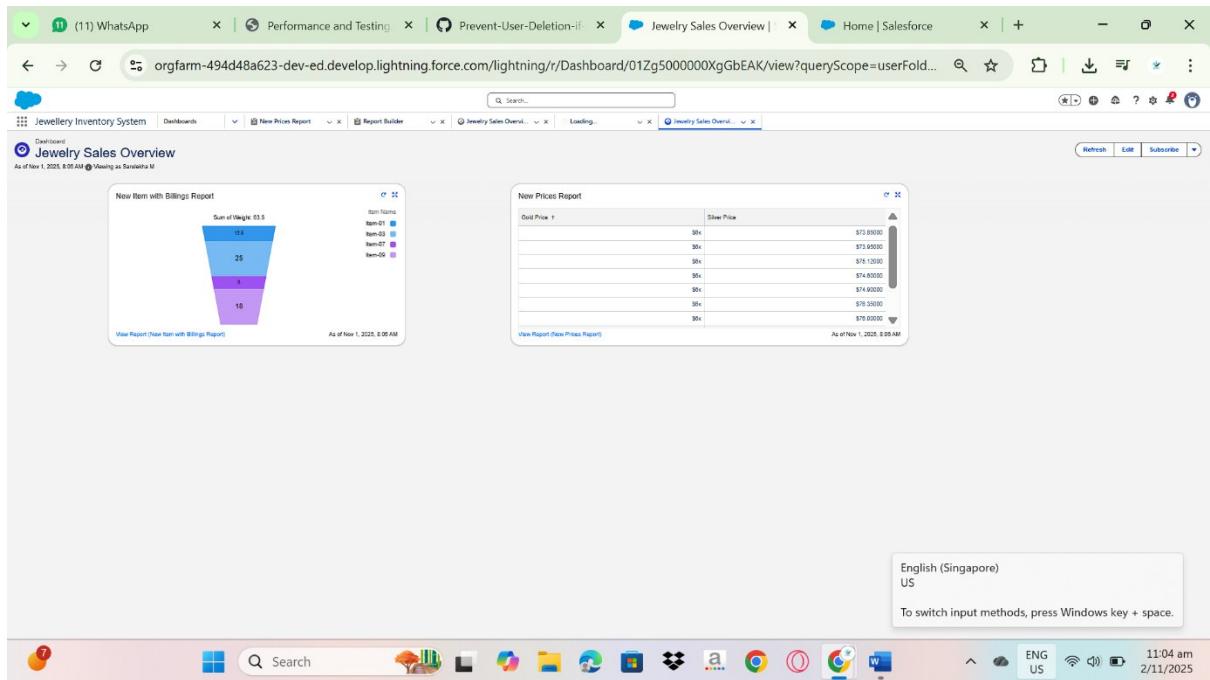
Parameter Value

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