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

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
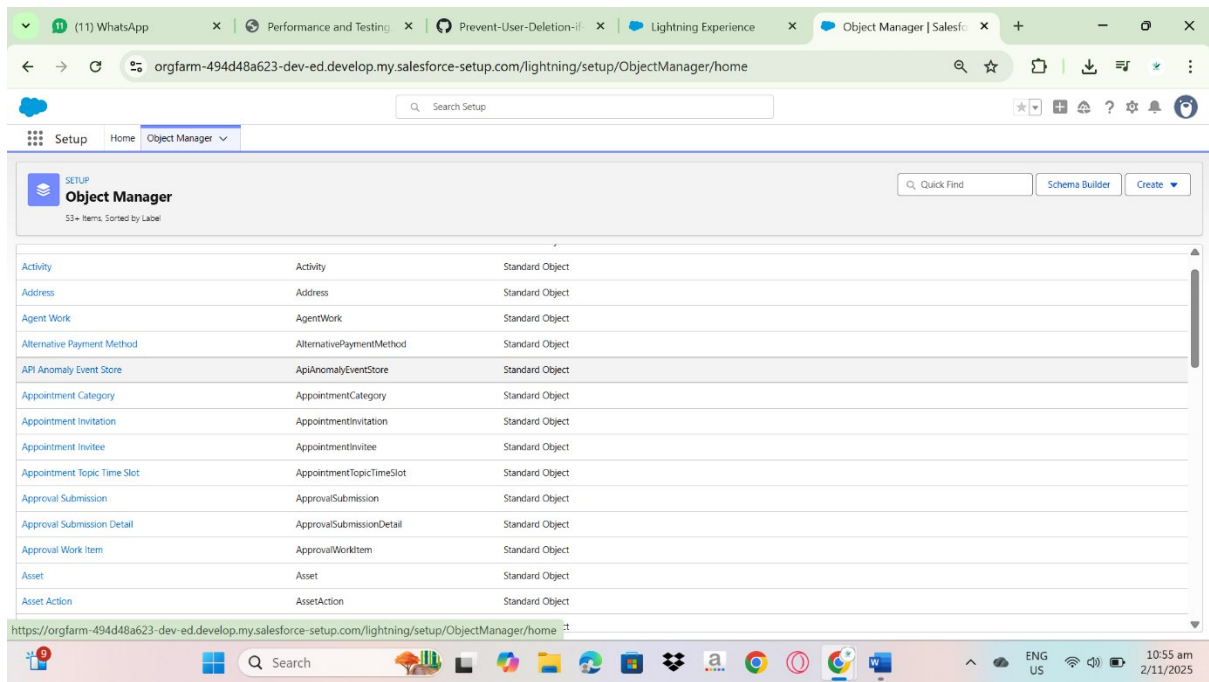
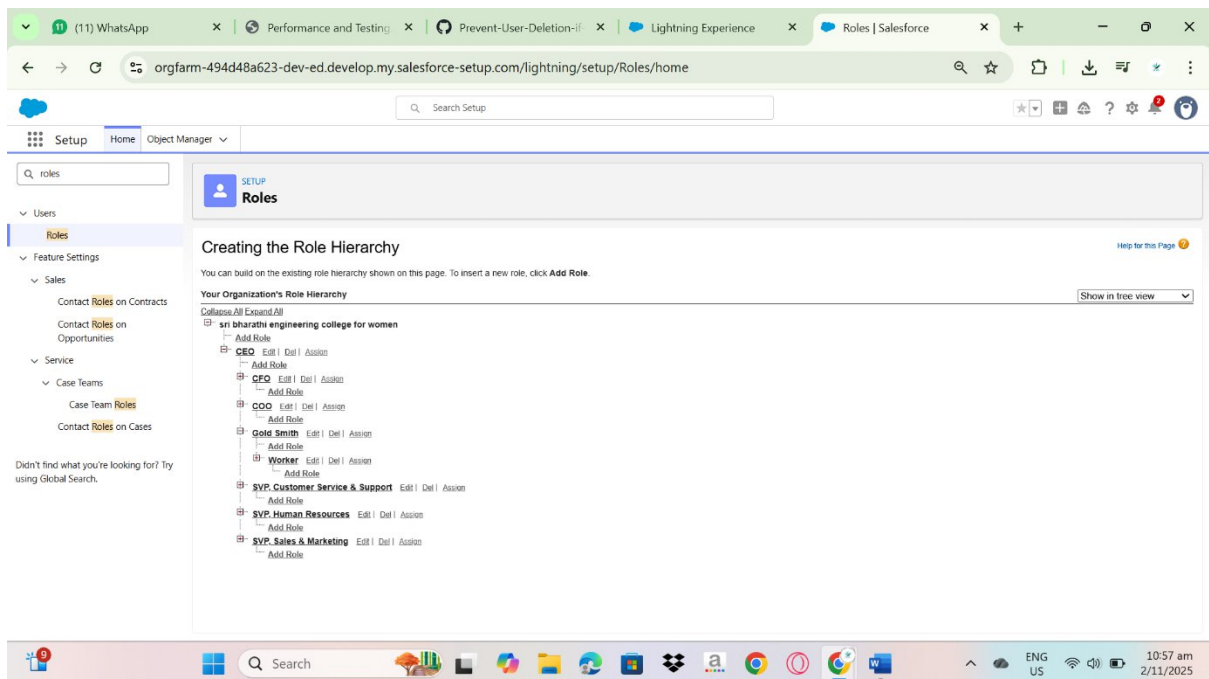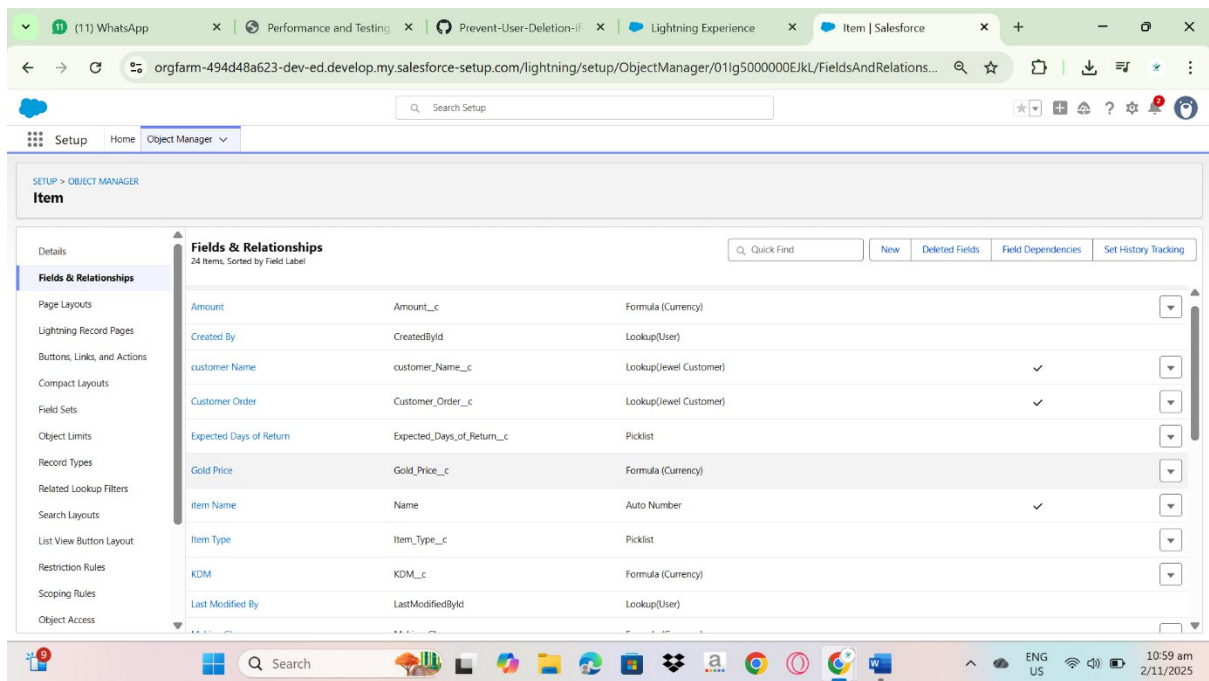| Parameter	Value
Objective	To define and organize main custom objects for the Jewel Management CRM System.
Description	Tabs were created for custom objects such as *Customers*, *Jewelry Items*, *Orders*, and *Billings* to streamline navigation and data management.
Tool Used	Salesforce Object Manager → Tabs

Roles Setup

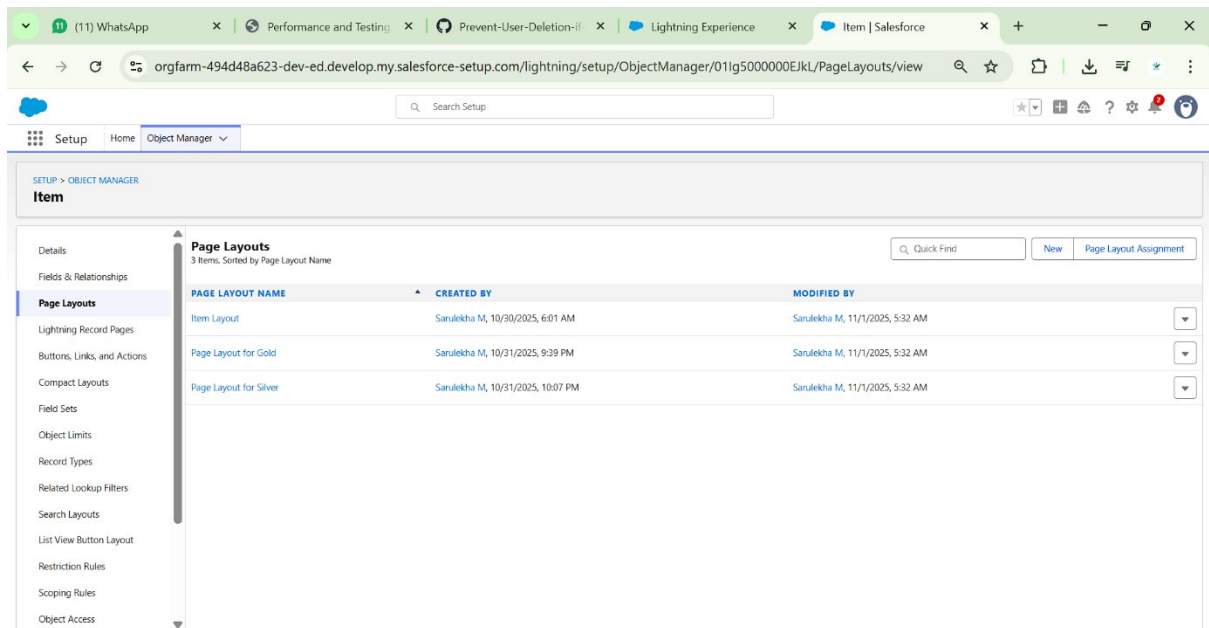| Parameter	Value
Objective	To implement a role hierarchy for managing data access and visibility across the jewelry store.
Description	Roles were assigned, such as *Sales Executive*, *Store Manager*, and *Administrator*, ensuring secure access and accountability for customer and billing records.
Tool 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
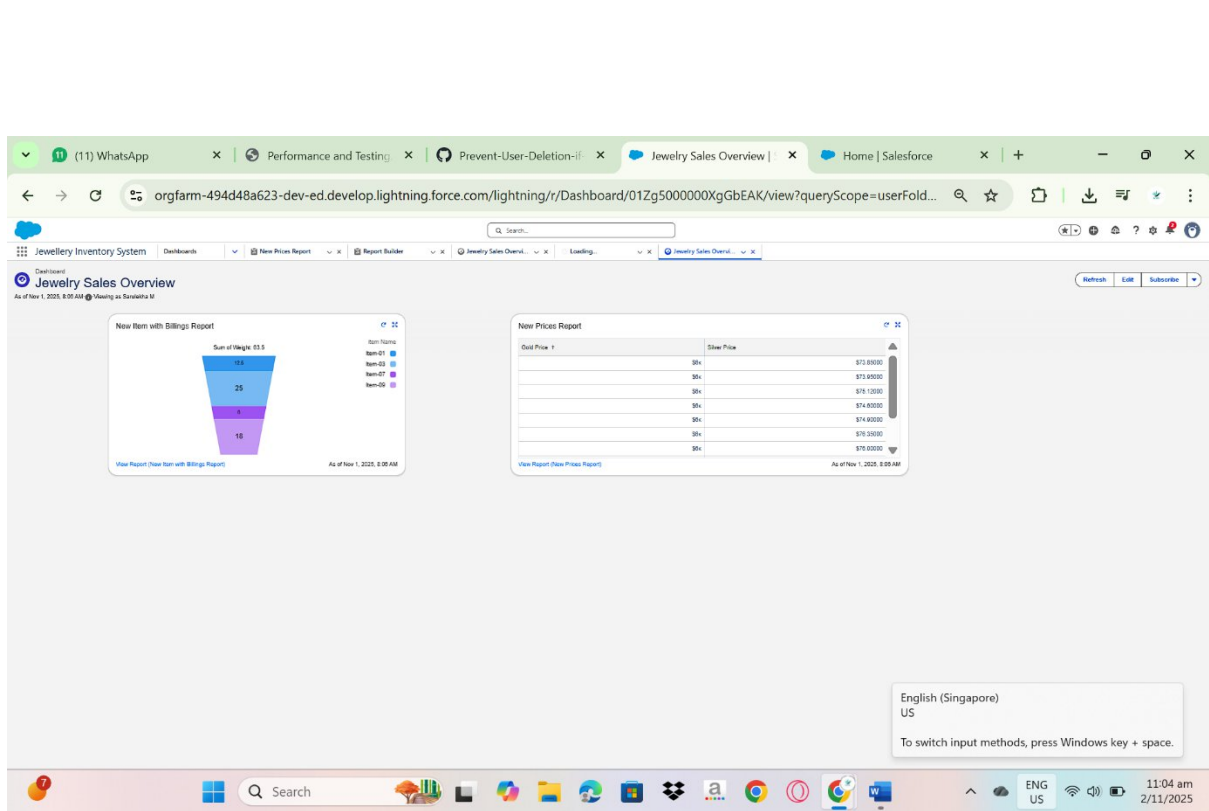
Parameter	Value
Objective	To visualize and monitor customer, order, and billing data in real-time.
Description	A Salesforce dashboard was designed to display *total sales*, *most purchased jewelry categories*, *top customers*, and *monthly billing reports*.
Tool Used	Salesforce Dashboard & Reports