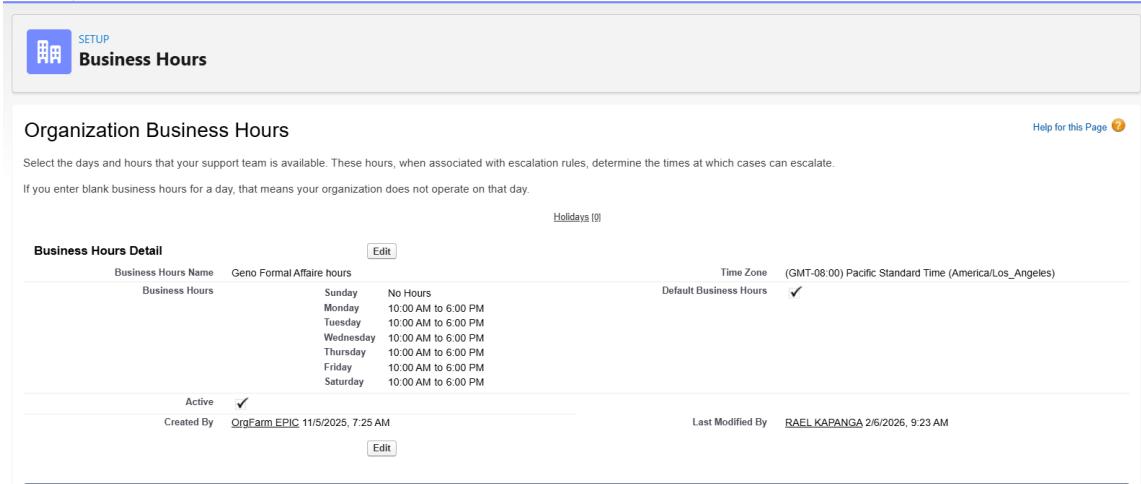


Phase 1) Org Setup & Company Settings

Company Configuration

- Setting up business Hours, what day and time the business is open during the week.



Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

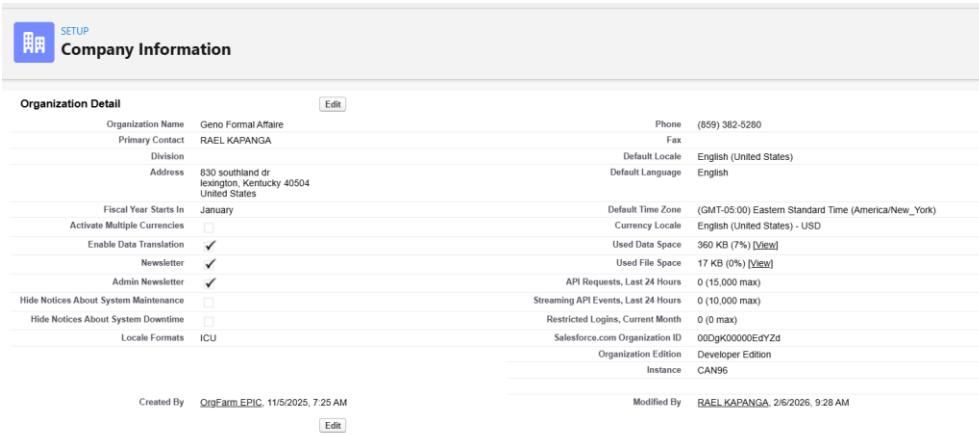
Business Hours Name	Geno Formal Affairs hours	Time Zone	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Business Hours	Sunday Monday Tuesday Wednesday Thursday Friday Saturday	No Hours 10:00 AM to 6:00 PM 10:00 AM to 6:00 PM	Default Business Hours ✓

Active ✓

Created By [OrgFarm EPIC](#) 11/5/2025, 7:25 AM

Last Modified By [RAEL KAPANGA](#) 2/6/2026, 9:23 AM

- Setting up the locale of the company, Address, Default Language, Currency Locale, Default Locale



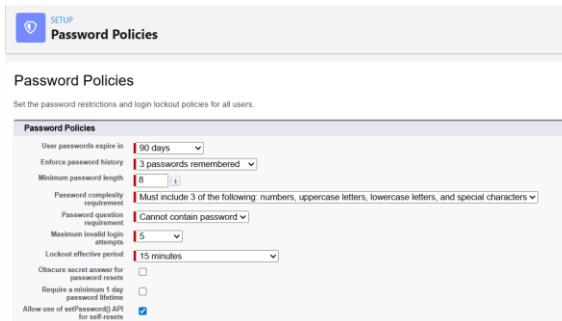
Organization Detail

Organization Name	Gino Formal Affairs	Phone	(859) 382-5280
Primary Contact	Rael Kapanga	Fax	
Division		Default Locale	English (United States)
Address	630 southland dr Lexington, Kentucky 40504 United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-05:00) Eastern Standard Time (America/New_York)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input checked="" type="checkbox"/>	Used Data Space	360 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK0000EY2z2d
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#) 11/5/2025, 7:25 AM

Modified By [RAEL KAPANGA](#) 2/6/2026, 9:28 AM

- Setting up password Policies by enforcing complexity and minimum length



Password Policies

Set the password restrictions and login lockout policies for all users.

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include 3 of the following: numbers, uppercase letters, lowercase letters, and special characters
Password question	Cannot contain password
Maximum invalid login attempts	5
Lockout after invalid login attempts	15 minutes
Obscure secret answer for password reset	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Allow use of selfPassword@!API for self-resets	<input checked="" type="checkbox"/>

Setting up User and Profiles

Roles hierarchy for data access

Role:

- CEO: report to no one
- Managers: report to the CEO
- Marketing associate: report to the managers
- Sales Associate: report Managers
- Customer service: report Managers

Profiles

- CEO Profile
- Manager Profile
- Sales Profile
- Marketing Profile
- Customer Service Profile

For best practice, I will clone standard User profiles and customize it for the manager, sales, marketing and customer service profiles. Giving them basic access and use permissions to give additional data access to profiles.

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The page title is 'Profiles'. At the top, there are buttons for 'New Profile' and 'Edit'. Below the buttons, there is a search bar and a 'Help for this Page' link. The main content area displays a list of profiles with columns for 'Action', 'Profile Name', and 'Last Modified'. The 'Profile Name' column lists profiles such as 'B2B Reordering Portal Buyer Profile', 'CEO_Profile', 'Custom_Marketing_Profile', 'Custom_Sales_Profile', 'Custom_Support_Profile', 'Customer_Service_Profile', 'Israel KAPA', 'Manager_Profile', 'Marketing_Profile', 'Read Only', and 'Salesforce API Only System Integrations'. The 'Last Modified' column shows dates like '10 hours ago' and '1 day ago'. A vertical scrollbar is visible on the right side of the list.

Users:

- Matthew Guarneri under the CEO Profile and has a CEO Role
- Carrie Thomas under the Manager Profile and has a Manager Role
- Allison Parker under the Marketing Profile and has a Marketing Role
- Zoe Smith under the Sales Profile and has a Sales Role
- Lucy Hill under the Marketing Profile and has a marketing Role

PHASE 2) STANDARD OBJECTS SETUP

Accounts

- I used the Account object to represents customers or wedding parties
- I used it for grouping multiple contacts and their rentals

Contacts

- Represents individuals renting suits or tuxedos
- Linked to Accounts via standard lookup relationship

Products & Price Books

Products:

- Suits
- Tuxedos
- Accessories (tie or bow tie, shirt, pocket square,) bundle
- Shoes

The screenshot shows the Salesforce Product list view. At the top, there's a search bar and a toolbar with various icons. Below that, a header bar displays 'Recently Viewed' and other navigation links. The main area is a table listing four products: ACCESSORIES, TUXEDOS, SUITS, and shoes. Each row includes columns for Product Name, Product Type, Product Code, and Product Description.

	Product Name	Product ...	Product Code	Product Description
1	ACCESSORIES	Simple	AC001	The accessories product contains long tie, bow tie, pocket square and scuffing
2	TUXEDOS	Simple	4501TUX	tuxedos jacket with satin lapel and tuxedos pants
3	SUITS	Simple	4501ST	suit jacket and pants
4	shoes	Simple	ST007	tux shoes

Price Books:

The screenshot shows the Salesforce Price Book list view. At the top, there's a search bar and a toolbar with various icons. Below that, a header bar displays 'Recently Viewed' and other navigation links. The main area is a table listing three price books: Geno's Standard Price Book, Geno's Discount Price Book, and Standard Price Book. Each row includes columns for Price Book Name, Description, Last Modified Date, and Active status.

	Price Book Name	Description	Last Modified Date	Active
1	Geno's Standard Price Book		2/12/2026, 9:11 PM	✓
2	Geno's Discount Price Book		2/12/2026, 9:11 PM	✓
3	Standard Price Book		11/5/2025, 7:25 AM	○

I have created 2 price books for products with different prices, standard prices and discounted prices and related each product to the price book to allow me to add products to opportunities with the right prices.

Rental Custom Object :

The screenshot shows the 'Object Manager' interface for the 'Rental' custom object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Details' tab for the 'Rental' object. It includes fields for API Name ('Rental__c'), Singular Label ('Rental'), Plural Label ('Rentals'), and several checkboxes for 'Enable Reports', 'Track Activities', 'Track Field History', and 'Deployment Status'. Deployment status is set to 'Deployed'.

- On this step I have created a custom object named rental and add custom field to it and defined the relationship between the object and the account and contact object

Custom field created on the Rental object

The screenshot shows the 'Fields & Relationships' section for the 'Rental' object. The left sidebar lists configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel lists various fields and their relationships. Under 'Fields & Relationships', there are entries for Account (Master-Detail/Account), Contact (Lookup(Contact)), Created By (Lookup(User)), Due Back Date (Date), Event Date (Date), Event Type (Picklist), Last Modified By (Lookup(User)), Pickup Date (Date), Product (Lookup(Product)), and Record Type (Record Type). Below this, under 'Record Type', there are custom fields: Rental Duration (Formula (Number)), Rental Status (Picklist), Rentals Name (Name), Suit/Tuxedo Color (Picklist), and Suit/Tuxedo Style (Picklist).

- Relationship between the rental object and the Account object: Master detail relationship to have the possibility to delete all rentals records just by deleting the Account related to it, to be able to allow roll-up summary fields later and add to related list on the account layout page.

Relationship between the rental object and the Contact object: look up relationship, this links the individual renter.

PHASE 3) RECORD TYPES & PAGE LAYOUTS

Because the company is doing suits and tuxedos rental, I have created 2 different record types

The screenshot shows the Salesforce Object Manager interface for the 'Rental' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Record Types' option is selected and highlighted in blue. The main content area is titled 'Record Types' and displays two items: 'Suit Rental' and 'Tuxedo Rental'. A table provides details for each record type:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Suit Rental		✓	RAEL KAPANGA, 2/13/2026, 2:30 PM
Tuxedo Rental		✓	RAEL KAPANGA, 2/13/2026, 2:32 PM

Buttons at the top right include 'Quick Find', 'New', and 'Page Layout Assignment'.

I implemented Record Types on the Rental object to support the two different rental service categories with customized page layouts for each.

Assign Page Layouts

For each Record Type:

- Assigned a dedicated Page Layout
- Configured layout sections to display relevant fields per rental type

Suit Rental Layout includes Single breasted, Double breasted, Three pieces

Tuxedo Rental Layout includes Notch Lapel, Peak Lapel, Shawl Lapel

This ensures users only see fields relevant to the selected rental record type.

Profile Assignment

Assigned both Record Types to appropriate user profiles.

Configured Available Record Types for profile and default Record Type selection.

This allows users to choose the correct rental category when creating new records.

Functional Outcome

When a user clicks "New" on the Rental object, they are prompted to select a Record Type.

The selected Record Type determines:

- The Page Layout displayed

- The fields available for data entry

Output in the in salesforce

Page layout

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
suit Rentals Layout	RAEL KAPANGA, 2/14/2026, 1:51 PM	RAEL KAPANGA, 2/14/2026, 2:05 PM
Tuxedo Rentals Layout	RAEL KAPANGA, 2/13/2026, 2:42 PM	RAEL KAPANGA, 2/14/2026, 2:05 PM

Page layout configuration

- Suit page layout

Fields

Section	Contact	Event Type	Product	Rental Status
Blank Space	Created By	Fit Style	Record Type	Suit Style
Account	Due Back Date	Last Modified By	Rental Duration	Tuxedo rental style
Color	Event Date	Pickup Date	Rentals Name	

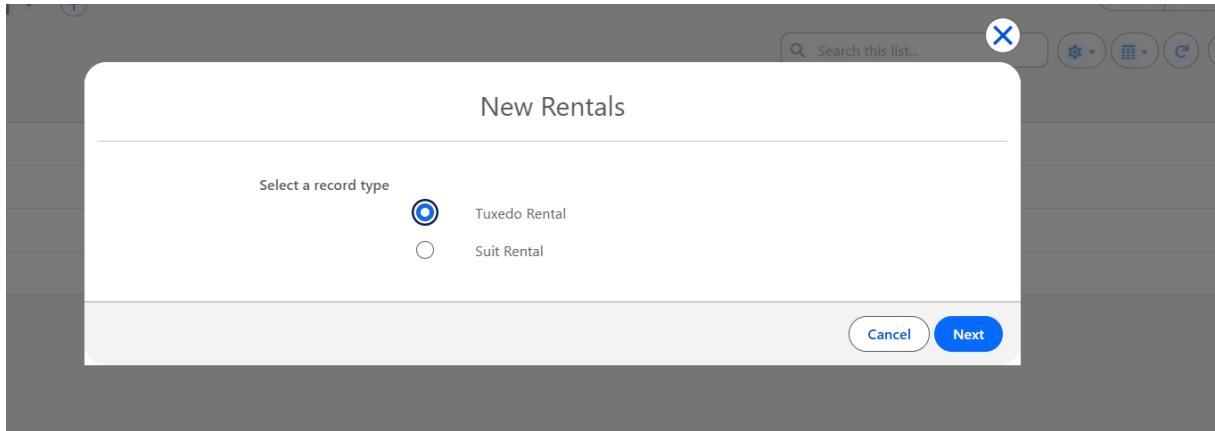
Rentals Detail

Rental Information	Rentals Name: GEN-2004-001234
Event Date: 2/14/2026	Product: Sample Text
Event Type: Sample Text	
Product Details	Color: Sample Text
Pickup Date: 2/14/2026	
Due Back Date: 2/14/2026	Rental Status: Sample Text
	Rental Duration: 7:130:5

- Tuxedos page layout

- Output when creating a new record on the Rental object

User has to select one record type before creating a new rental record.



- Data input in custom field on the Rental object

- Details page

The screenshot shows a Salesforce interface for a 'Rental' record. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Rentals, Standard Price Book, Price Book, ACCESSORIES, Product, More, and a search bar. The main content area displays the following fields:

- Rental Information:**
 - Account: Reel Kapanga
 - Rentals Name: TA-00005
 - Contact: first name
 - Product: TUXEDOS
- Event Information:**
 - Event Date: 2/14/2026
 - Event Type: Wedding
- Product Details:**
 - Fit style: Classic
 - Color: Navy
 - Tuxedo rental style: Peak Lapel
- Status Tracking:**
 - Pickup Date: 2/14/2026
 - Rental Status: in Process
 - Due Back Date: 2/21/2026
 - Rental Duration: 7.0

On the right side, there is a sidebar with various icons for New Contact, Edit, New Opportunity, and other actions. It also includes a section for Upcoming & Overdue activities, which currently shows no results.

Implementing Record Types provides:

- Clear categorization of rental services
- Improved data accuracy
- Enhanced reporting and segmentation
- Scalability for future rental categories