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Salesforce Project Summary

Geno Formal Affair – Rental Management System

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1. Project Overview

This project is a full Salesforce org design for **Geno Formal Affair**; a suit and tuxedo rental business located in Kentucky.

Company Setup & Org Configuration

I started this project by setting up the company foundation in Salesforce for **Geno Formal Affair**, a suit and tuxedo rental business located in Kentucky.

During the initial setup, I configured:

- Business hours

- Company address and locale settings

- Default language and currency

- Password policies and security settings

After that, I created the **role hierarchy** to match how the business operates:

- CEO (top of hierarchy)

- Managers (report to CEO)

- Sales Associates (report to Managers)

- Marketing Associate (report to Managers)

- Customer Service (report to Managers)

Then I created and customized **profiles** by cloning standard profiles:

- CEO Profile

- Manager Profile

- Sales Profile

- Marketing Profile

- Customer Service Profile

Each profile has different object permissions depending on job responsibilities. This ensures proper access control from the beginning.

The goal was to build a structured, automated, and secure system to manage:

- Customers (Accounts & Contacts)

- Suit and tuxedo rentals

- Wedding party discounts

- Approval processes

- Reporting and dashboards

- Security & user access

This project demonstrates real-world Salesforce Admin skills including data modeling, automation, security configuration, reporting, and business process design.

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2. Data Model & Object Structure

Standard Objects Used:

- **Accounts** – Wedding parties / customers

- **Contacts** – Individual renters

- **Products & Price Books** – Suits, tuxedos, accessories, shoes

Custom Object:

- **Rental (Custom Object)**

    o Master-Detail relationship with Account

    o Lookup relationship with Contact

    o Includes rental dates, status, fit style, event type, return tracking

Record Types were created for:

- Suit Rentals

- Tuxedo Rentals

Each record type has its own page layout to improve user experience and data accuracy.

3. Automation & Business Logic

Multiple record-triggered flows were created to automate rental lifecycle stages:

- Automatically update status to **Order Placed**

- Change status to **Past Due** when rental is late

- Update status to **Returned**

- Send automated email notifications when rentals are overdue

Validation rules were implemented to:

- Prevent past due dates

- Ensure logical pickup and return dates

- Maintain clean and accurate data

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4. Reports & Dashboard

Five operational reports were created:

- Rentals Past Due

- Most Rented Style

- Returned Rentals

- Ready for Pickup

- Placed Orders

These reports are feed into the **Rental Management Dashboard**, which includes visual components (donut charts, bar charts, tables) to provide real-time business insights and support decision-making.

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5. Approval Processes

Two approval processes were designed:

1. Rental Extension Approval

- Triggered when rental duration exceeds 7 days

- Manager approval required

- Approval status field updates automatically

- Email notifications sent

2. Wedding Party Discount Approval

- For discounts beyond standard 15% for large wedding parties

- Manager must approve additional discount

- Automated status updates and email alerts

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6. Security Model

A complete 3-layer security model was implemented:

Object-Level Security

Controlled via Profiles:

- CEO (Full access)

- Manager

- Sales

- Marketing

- Customer Service

Record-Level Security

- Organization-Wide Defaults set to Private for Accounts

- Rentals controlled by parent

- Sharing rules allow Marketing & Customer Service read-only access

- Role hierarchy gives managers access to their team's records

Field-Level Security

Restricted sensitive fields based on job function.

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7. Business Impact

This Salesforce org:

- Automates rental tracking

- Reduces manual work

- Improves customer communication

- Prevents data errors

- Provides real-time reporting

- Ensures secure data access

It reflects a real-world rental management solution built using Salesforce best practices.

Tools & Features Used

- Salesforce Flows
- Approval Processes
- Validation Rules
- Record Types

- Sharing Rules
- Reports & Dashboards
- Field-Level Security
- Permission Sets
- Email Alerts

Key Takeaway

This project demonstrates end-to-end Salesforce administration skills from data modeling and security architecture to automation, reporting, and real-world business alignment.

It shows the ability to translate business requirements into a functional Salesforce solution that streamlines operations, improves data integrity, and supports decision-making through automation and analytics.