Phase 1) Org Setup & Company Settings

Company Configuration

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

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

- Setting up password Policies by enforcing complexity and minimum length

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.
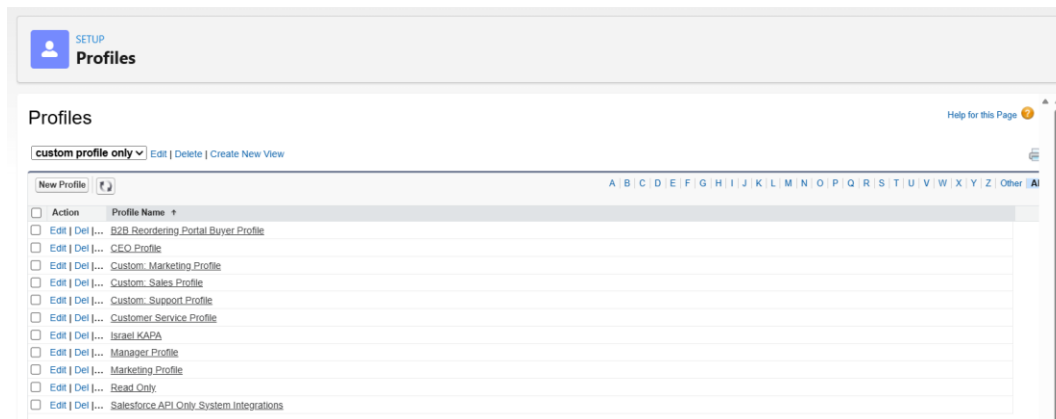
Users:

- 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

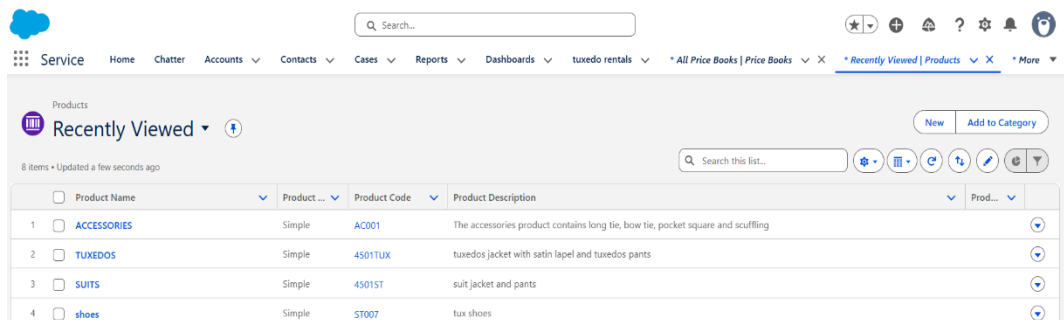- I used it for grouping multiple contacts and their rentals

Contacts

- Represents individuals renting suits or tuxedos

- Linked to Accounts via standard lookup relationship
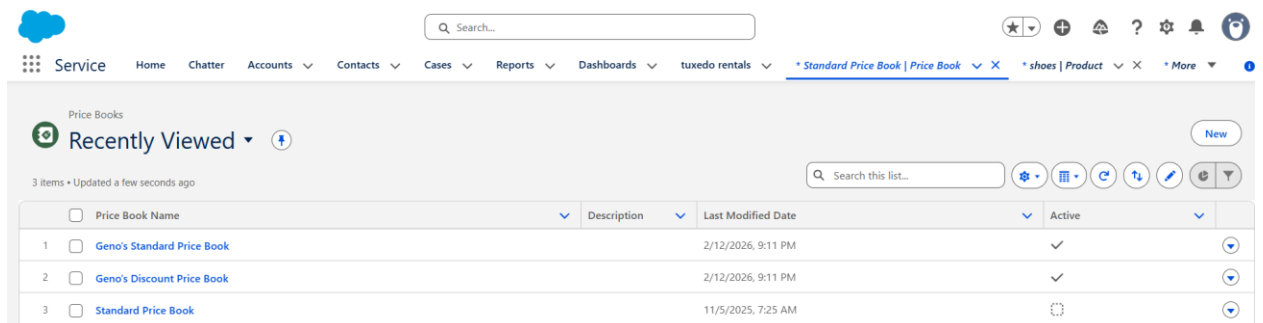
Products & Price Books

Products:

- Suits

- Tuxedos

- Accessories (tie or bow tie, shirt, pocket square,) buddle

- Shoes

Price Books:

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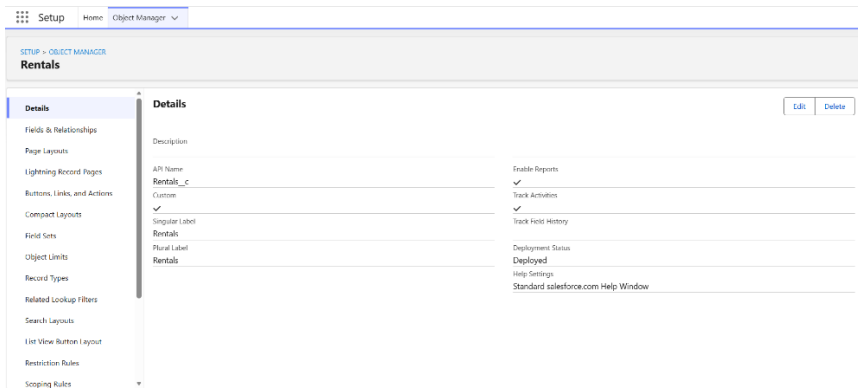
- On this step I have created a custom object named rental and add custom field to it and defined the relationship between the object and the account and contact object

Custom field created on the Rental object

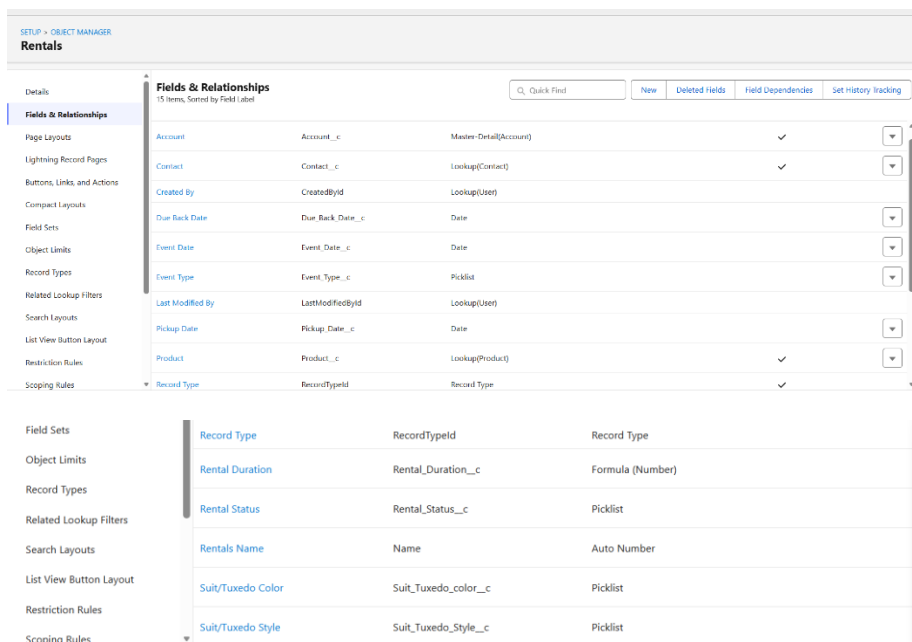- Relationship between the rental object and the Account object: Master detail relationship to have the possibility to delete all rentals records just by deleting the Account related to it, to be able to allow roll-up summary fields later and add to related list on the account layout page.

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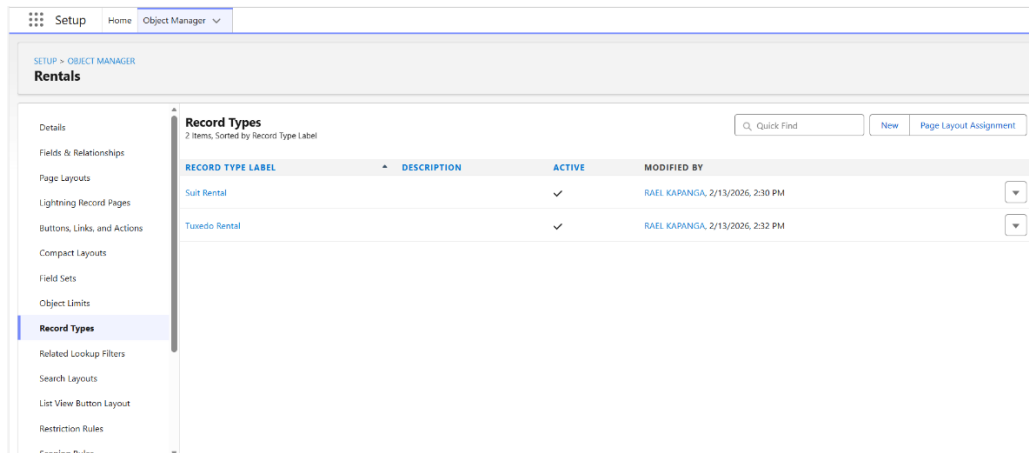
I implemented Record Types on the Rental object to support the two different rental service categories with customized page layouts for each.

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 Lape, 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

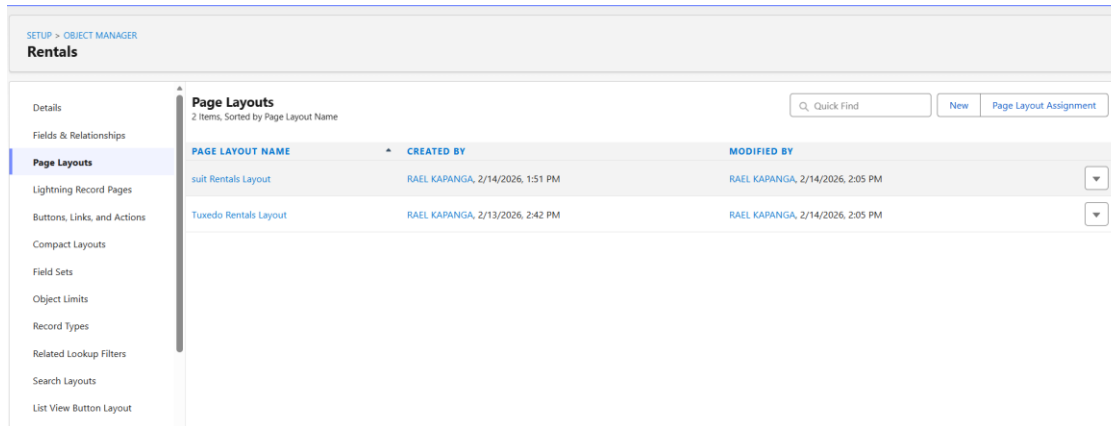When a user clicks "New" on the Rental object, they are prompted to select a Record Type.

The selected Record Type determines:

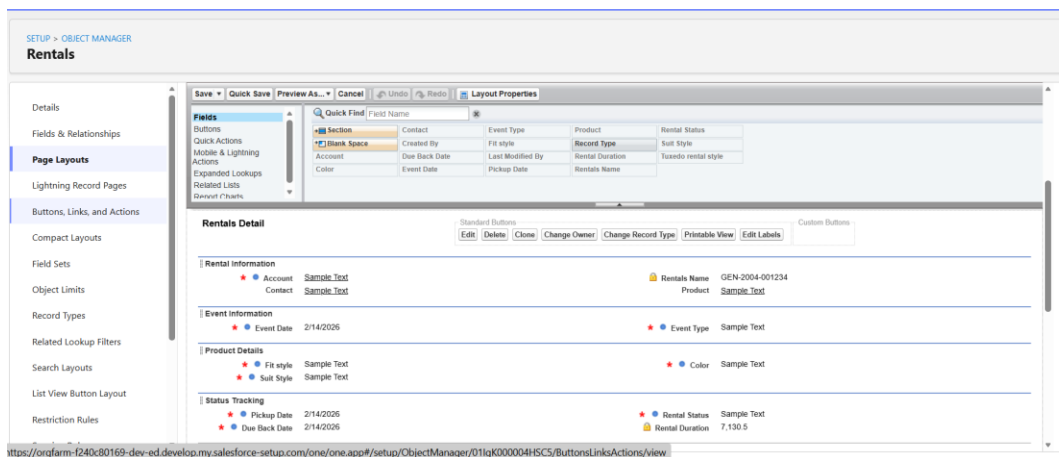- The Page Layout displayed

- The fields available for data entry

Output in the in salesforce

Page layout

Page layout configuration

- Suit page layout

- 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

Implementing Record Types provides:

- Clear categorization of rental services

- Improved data accuracy

- Enhanced reporting and segmentation

- Scalability for future rental categories