


## Phase 1) Org Setup & Company Settings

### Company Configuration

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

 **Business Hours**

#### 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** [Edit](#)

Business Hours Name	Geno Formal Affaire hours	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>No Hours</td></tr><tr><td>Monday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Tuesday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>10:00 AM to 6:00 PM</td></tr></table>	Sunday	No Hours	Monday	10:00 AM to 6:00 PM	Tuesday	10:00 AM to 6:00 PM	Wednesday	10:00 AM to 6:00 PM	Thursday	10:00 AM to 6:00 PM	Friday	10:00 AM to 6:00 PM	Saturday	10:00 AM to 6:00 PM	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)
Sunday	No Hours															
Monday	10:00 AM to 6:00 PM															
Tuesday	10:00 AM to 6:00 PM															
Wednesday	10:00 AM to 6:00 PM															
Thursday	10:00 AM to 6:00 PM															
Friday	10:00 AM to 6:00 PM															
Saturday	10:00 AM to 6:00 PM															
Active	<input checked="" type="checkbox"/>	Default Business Hours <input checked="" type="checkbox"/>														
Created By	OrgFarm EPIC, 11/5/2025, 7:25 AM	Last Modified By RAEI KAPANGA, 2/6/2026, 9:23 AM														

[Edit](#)

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

 **Company Information**


#### Organization Detail

[Edit](#)

Organization Name	Geno Formal Affaire	Phone	(859) 362-5280
Primary Contact	RAEL KAPANGA	Fax	
Division		Default Locale	English (United States)
Address	830 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%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
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	00DgK00000EdYzd
		Organization Edition	Developer Edition
		Instance	CAN56
Created By	OrgFarm EPIC, 11/5/2025, 7:25 AM	Modified By	RAEL KAPANGA, 2/6/2026, 9:28 AM

[Edit](#)

- Setting up password Policies by enforcing complexity and minimum length

 **Password Policies**

#### Password Policies

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

**Password Policies**

How 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 requirement **Cannot contain password**

Maximum invalid login attempts **5**

Lockout effective period **15 minutes**

Obscure secret answer for password resets ☐

Require a minimum 1 day password lifetime ☐

Allow use of self-password() API for self resets ☒

## Setting up User and Profiles

### Roles hierarchy for data access

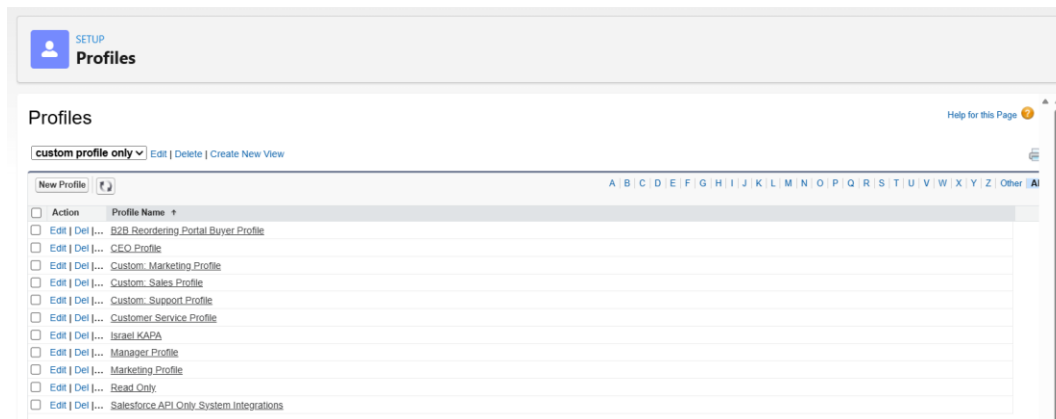
#### Role:

- 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

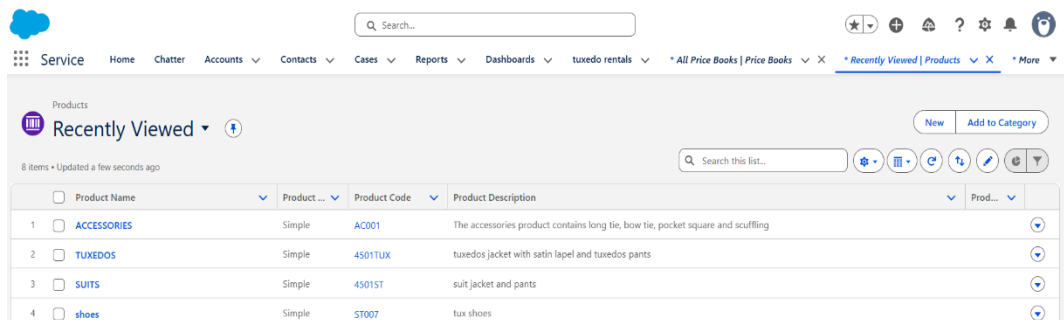
### Contacts

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

### Products & Price Books

#### Products:

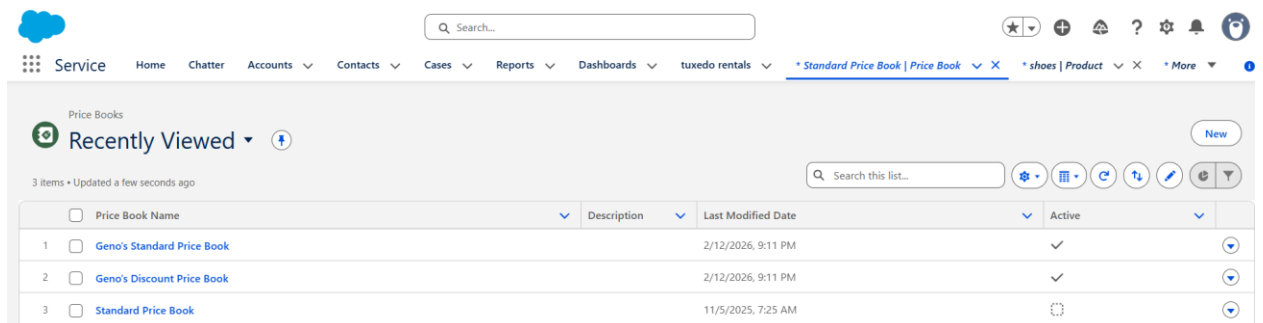
- Suits
- Tuxedos
- Accessories (tie or bow tie, shirt, pocket square, ) buddle
- Shoes



The screenshot shows the Salesforce 'Products' page with the 'Recently Viewed' tab selected. The table lists four products: ACCESSORIES, TUXEDOS, SUITS, and shoes. Each row includes a checkbox, product name, product type (Simple), product code, and product description.

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

#### Price Books:

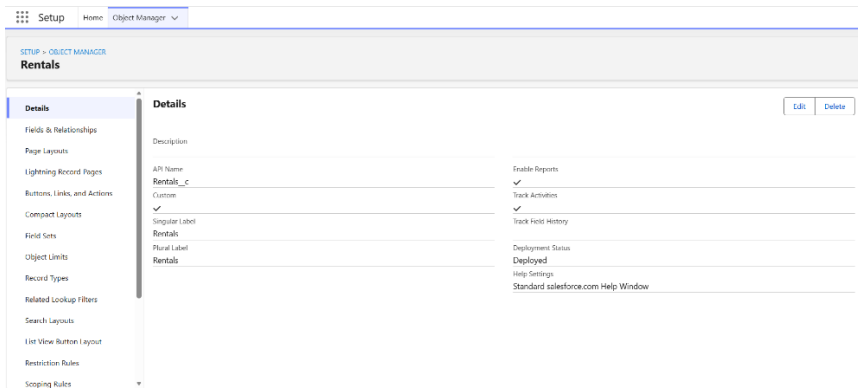


The screenshot shows the Salesforce 'Price Books' page with the 'Recently Viewed' tab selected. The table lists three price books: Geno's Standard Price Book, Geno's Discount Price Book, and Standard Price Book. Each row includes a checkbox, price book name, description, last modified date, and active status.

<input type="checkbox"/>	Price Book Name	Description	Last Modified Date	Active
1 <input type="checkbox"/>	Geno's Standard Price Book		2/12/2026, 9:11 PM	✓
2 <input type="checkbox"/>	Geno's Discount Price Book		2/12/2026, 9:11 PM	✓
3 <input type="checkbox"/>	Standard Price Book		11/5/2025, 7:25 AM	✗

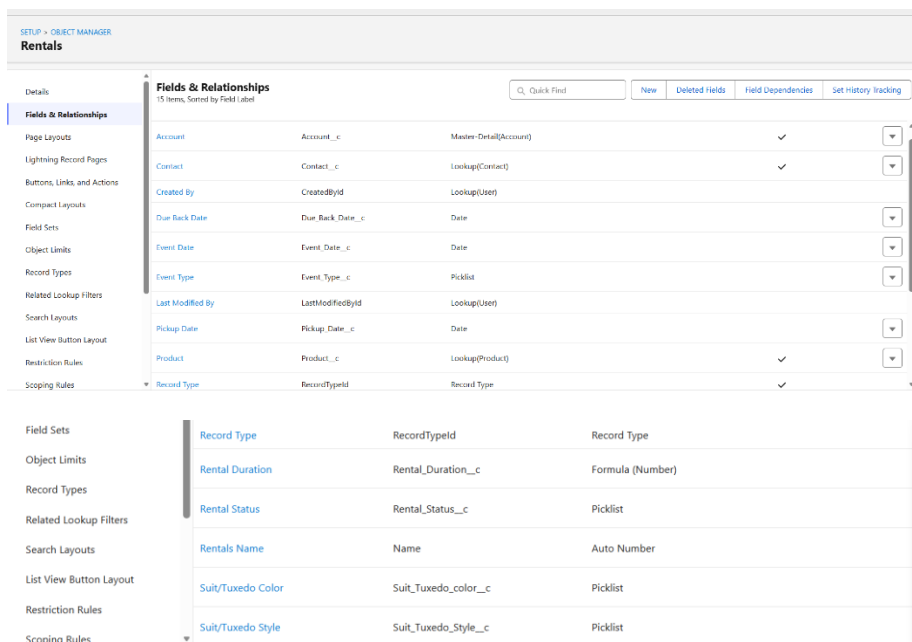
I have created 2 price books for products with different prices, standard prices and discounted prices and related each product to the price book to allow me to add products to opportunities with the right prices.

## Rental Custom Object :



- 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

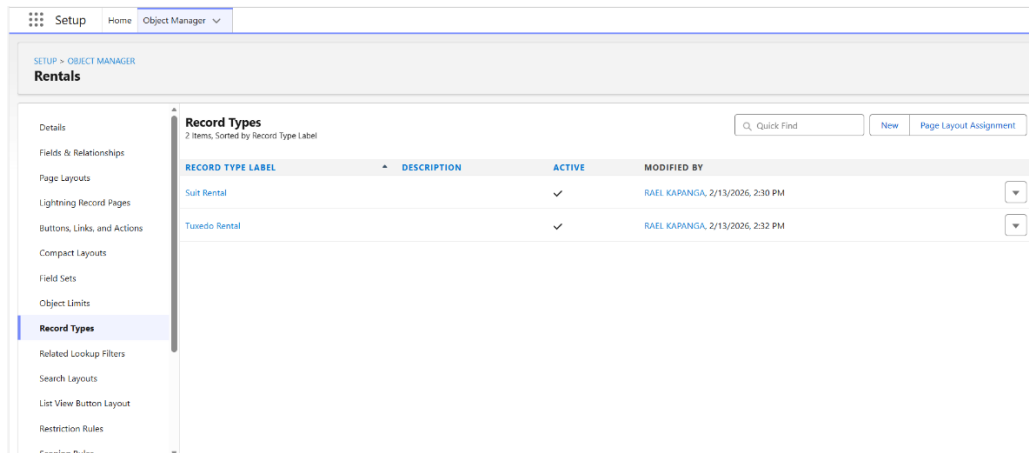


- Relationship between the rental object and the Account object: Master detail relationship to have the possibility to delete all rentals records just by deleting the Account related to it, to be able to allow roll-up summary fields later and add to related list on the account layout page.

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.

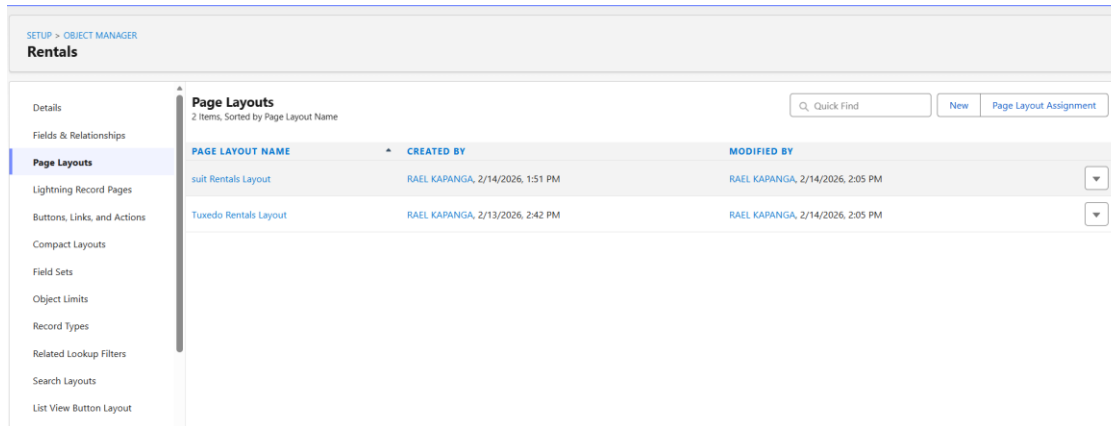
The selected Record Type determines:

- The Page Layout displayed

- The fields available for data entry

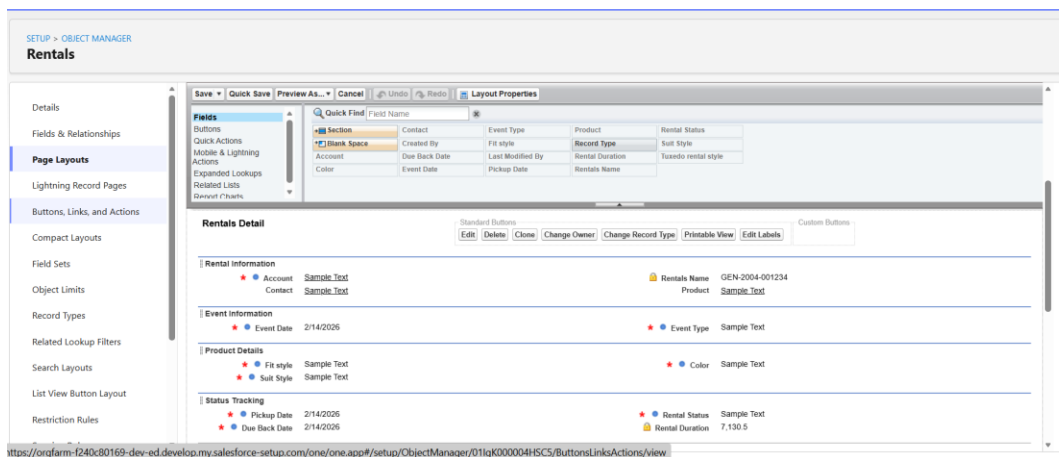
## Output in the in salesforce

### Page layout



### Page layout configuration

- Suit page layout



- Tuxedos page layout

SETUP > OBJECT MANAGER

## Rentals

Details
Fields & Relationships
Page Layouts
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

Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties

Quick Find

Field Name

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	

Standard Buttons
Edit
Delete
Clone
Change Owner
Change Record Type
Printable View
Edit Labels
Custom Buttons

Rental Information

Account

Contact

Sample Text

Rentals Name

Product

GFN 2004-001234

Sample Text

Event Information

Event Date

2/14/2026

Event Type

Sample Text

Product Details

Fit style

Sample Text

Tuxedo rental style

Sample Text

Color

Sample Text

Status Tracking

Pickup Date

2/14/2026

Rental Status

Sample Text

Due Back Date

2/14/2026

Rental Duration

6,121.3

- Output when creating a new record on the Rental object

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

Search this list...

New Rentals

Select a record type

☒

Tuxedo Rental

☐

Suit Rental

Cancel

Next

- Data input in custom field on the Rental object

Rental Information

Account

Rael Kapanga

Contact

first name

Rentals Name

Product

TUXEDOS

Event Information

Event Date

2/14/2026

Event Type

Wedding

Product Details

Fit style

Classic

Tuxedo rental style

Peak Lapel

Color

Navy

Status Tracking

Pickup Date

Rental Status

In Progress

Cancel

Save & New

Save

- Details page

The screenshot displays a CRM interface for a 'Rentals' record. The top navigation bar includes a search bar and various menu items like 'Service', 'Home', 'Chatter', 'Accounts', 'Contacts', 'Cases', 'Reports', 'Dashboards', and 'Rentals'. The main content area is titled 'Rentals TA-00005' and features four expandable sections:

- Rental Information:**

Account Rael 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

The right sidebar contains a 'New Contact', 'Edit', and 'New Opportunity' section, followed by filters (All time, All activities, All types) and an 'Upcoming & Overdue' section with a message: 'No activities to show. Get started by sending an email, scheduling a task, and more.' A 'Show All Activities' button is also present.

Implementing Record Types provides:

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