

Cosmetics Store Management – Phase 2

Phase 2: Org Setup & Configuration

Step 1: Define Clear Role Requirements

The first step was to define what each role—**Store Supervisor**, **Billing Operator**, and **Admin**—should be able to do within the Salesforce system.

- **Store Supervisor:** Can manage store inventory, oversee customer interactions, approve consultant/retailer activities, and view dashboards.
 - **Billing Operator:** Can create and manage billing records, process payments, and handle retailer/consultant invoices.
 - **Admin:** Has full access to all configurations, manages onboarding of users, ensures compliance, and customizes store operations.
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Step 2: Create or Confirm Profiles for Each Role

Profiles were created by cloning standard profiles and customizing them:

- **Store Supervisor Profile:** Based on *Standard User*, extended with access to Customers, Retailers, Consultants, and Dashboards.
- **Billing Operator Profile:** Based on *Salesforce Platform User*, limited to Billing-related objects with controlled access.
- **Admin Profile:** Based on *System Administrator*, fine-tuned for complete access to store management and compliance.

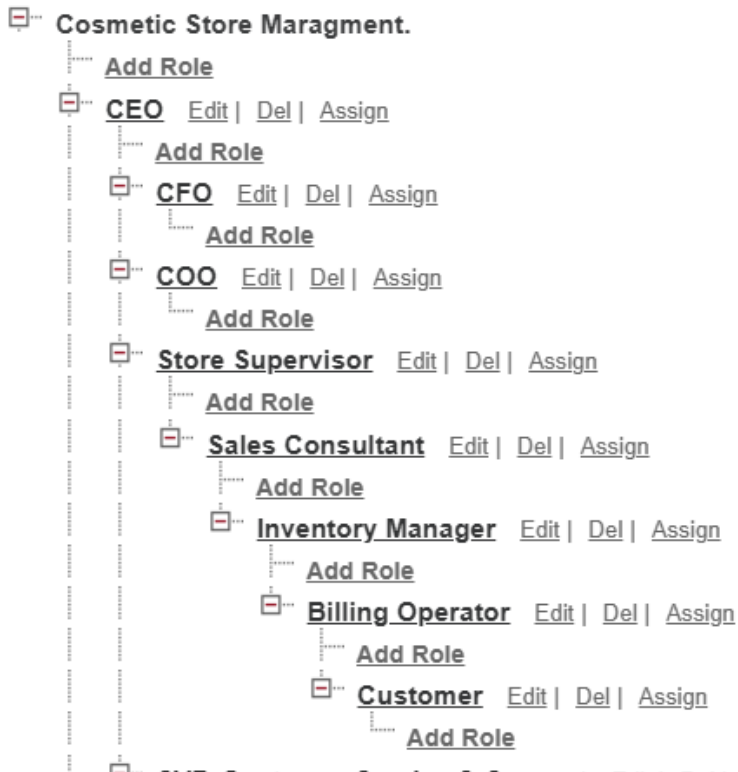
These profiles enforce role-based access, ensuring each user only interacts with relevant objects.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



Step 3: Assign Object Access Permissions for Standard and Custom Objects

- **Store Supervisors:** Full CRUD on Customers, Consultants, Retailers, Others, and Reports.
- **Billing Operators:** Create & Read permissions on Billing objects, limited edit on assigned records.
- **Admins:** Full CRUD access on all objects, including Inventory, Customer Data, Billing, and Reports.

Step 4: Configure Field-Level Security

Field-level security was applied to protect sensitive store and customer data:

- **Store Supervisors:** Full access to product-related fields, restricted from sensitive billing/finance fields.
- **Billing Operators:** Access to payment and invoice fields, but restricted from customer personal data not required for billing.
- **Admins:** Complete visibility of all fields across all objects.

Step 5: Set Tab Visibility in Profiles

- **Store Supervisors:** Customers, Consultants, Retailers, Inventory, Reports, Dashboards.
- **Billing Operators:** Billing, Invoices, Payments, Customers.
- **Admins:** All tabs including Setup, Compliance, and Reports.

Step 6: Assign Profiles to Users

- **Store Supervisors → Store Supervisor Profile**
- **Billing Operators → Billing Operator Profile**
- **Admins → Admin Profile**

Verification confirmed no user could escalate access beyond their role.

Profile Analyst

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to manage record types.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[2\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled Field Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) |

Profile Detail

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Analyst
User License	Salesforce
Description	
Created By	Alidandla nawaz , 9/24/2025, 11:32 PM

Step 7: Configure Business Hours and Holidays

- Business hours set to reflect store operating timings.
- Company-wide holidays configured to prevent scheduling conflicts.
- Approval workflows aligned to store timings to avoid non-working hours triggers.



Holiday Detail

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

[Business Hours \[0\]](#)

Holiday Detail

[Edit](#) [Delete](#)

Holiday Name	Gandhi Jaynathi
Description	
Date and Time	10/2/2026 All Day
Created By	Alidandla nawaz , 9/24/2025, 11:03 PM

[Edit](#) [Delete](#)

Step 8: Setup Sharing Rules

- **Employees (Operators):** Can only view/edit their own billing and assigned records.
- **Store Supervisors:** Can access records of customers, consultants, and retailers under their store.
- **Admins:** Full access to all records.

Role hierarchies and sharing rules maintain strict privacy while ensuring collaboration.

Step 9: Test User Access

Testing was conducted using the *Login As* feature:

- **Store Supervisors:** Could successfully view inventory, manage customers, and check reports.
- **Billing Operators:** Could create invoices, manage payments, and access billing data only.
- **Admins:** Verified complete access to all configurations, reports, and compliance dashboards.

All access controls, tab visibility, and field restrictions worked as intended.

 **Phase 2 Completion: Cosmetics Store Management Org Setup & Configuration Successfully Implemented.**
