SUBSCRIPTION & BILLING MANAGEMENT – CRM PROJECT

Industry : SaaS / Subscription Billing

Project Type : Salsforce CRM solution for subscription-based companies to manage customer subscriptions, automate billing cycles, and track invoices and payments across multiple plans.

Target Users :

Sales Representatives : Need to create and track customer subscriptions, view customer billing history, and check real-time payment status.

Finance/Billing Team : Need to monitor invoices, payments and handle refunds or failed payment retries.

Customer Service Agents : Need to access a centralized view of customer accounts, subscription status, and payment histories to resolve issues quickly.

Management/Administrators : Need real-time dashboards for revenue trends, churn rate, and outstanding invoices to make data-driven decisions.

Problem Statement :
Subscription-based companies currently use manual processes or multiple disconnected systems for managing subscriptions, billing, and payments. This leads to billing errors, missed renewals, delayed revenue collection, and lack of consolidated financial data. A automated CRM is needed to streamline these operations, reduce errors, and provide actionable insights for management.

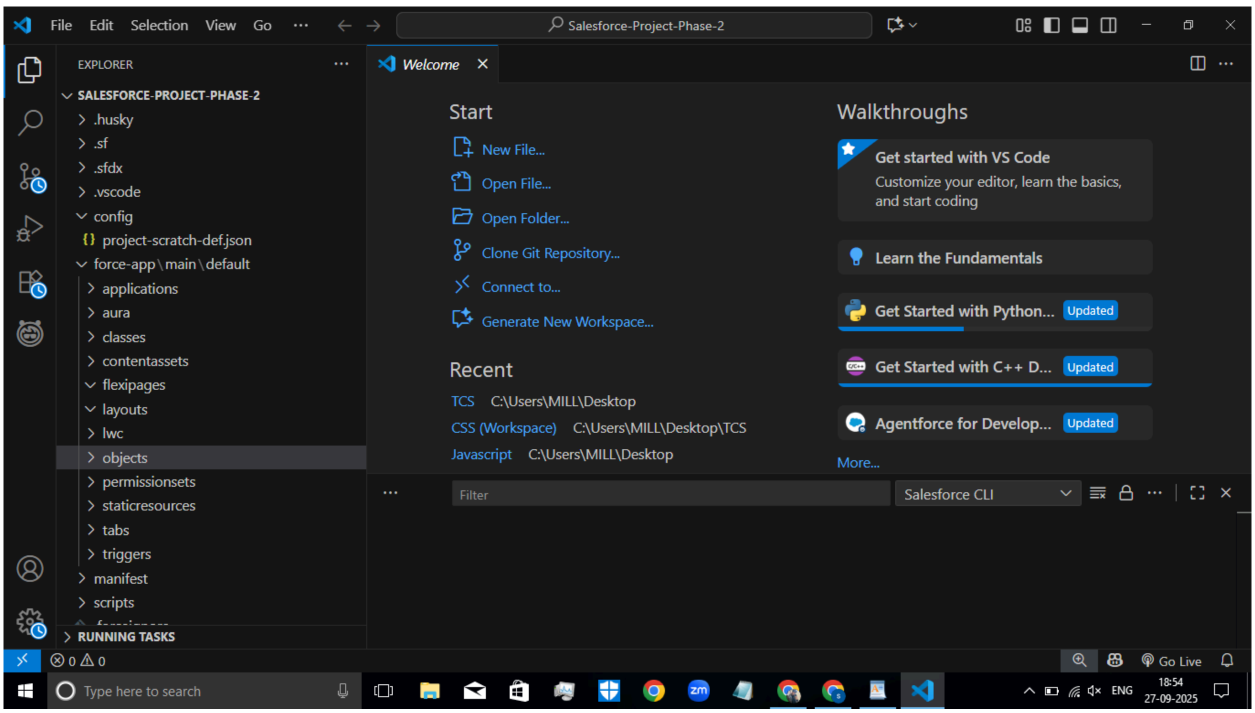
Phase 1: Problem Understanding & Industry Analysis

1. **Requirement Gathering**
    - Talk to stakeholders (Finance team, Subscription managers, Customers, Support).
    - Example requirements:
        - Manage subscriptions with start & end dates.
        - Auto-generate invoices when a subscription is created/renewed.
        - Track payments & outstanding balances.
        - Send reminders for renewals and overdue payments.
2. **Stakeholder Analysis**
    - Admin: System setup, data management.
    - Billing Manager: Approves invoices, manages disputes.
    - Finance Team: Tracks revenue, reconciles payments.
    - Customer Service: Handles cancellations, upgrades/downgrades.
    - Customer (End User): Subscribes, views invoices, makes payments.
3. **Business Process Mapping**
    - Flow:
      Customer subscribes → Subscription record created → Invoice auto-generated → Payment captured → Renewal reminders → Reports to Finance.
4. **Industry-Specific Use Case Analysis**
        - Recurring billing cycles.
        - Flexible subscription plans (monthly/annual).
          Payment gateway integration.

Phase 2: Org Setup & Configuration

Goal : To prepare the Salesforce environment by configuring user profiles, roles, and sharing settings to support the subscription and billing CRM solution.

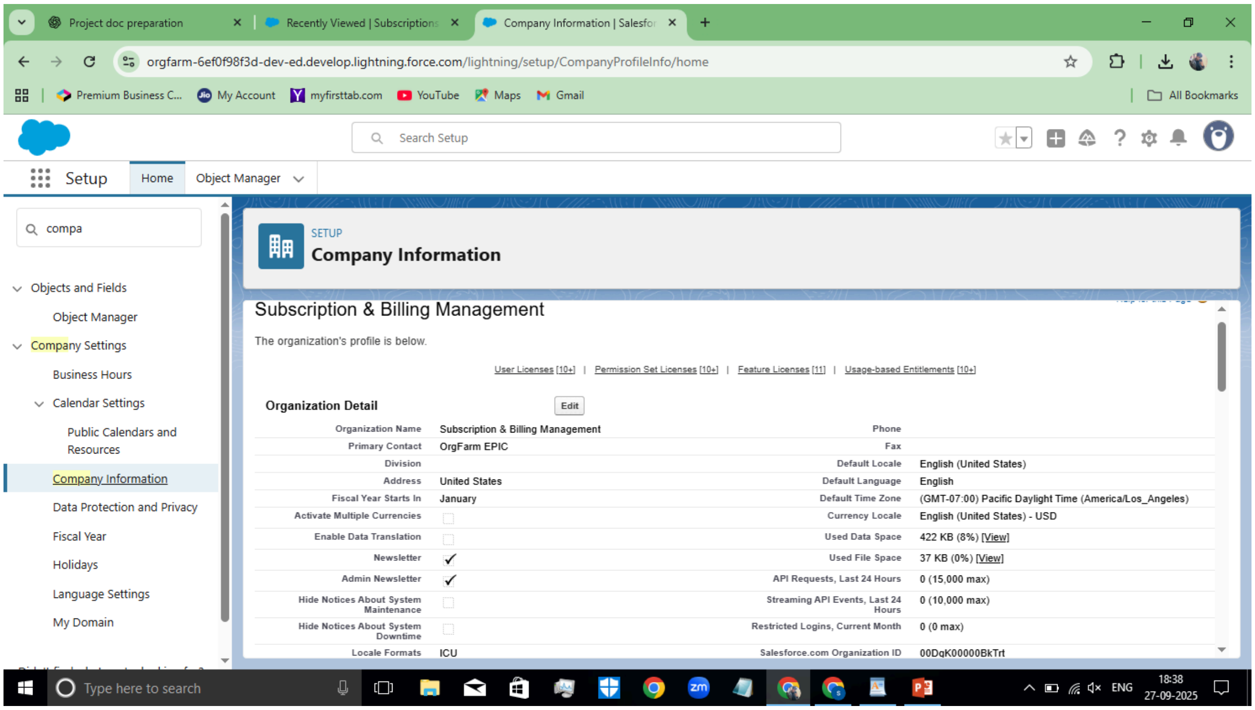
1. Salesforce Edition: Developer Org (free).



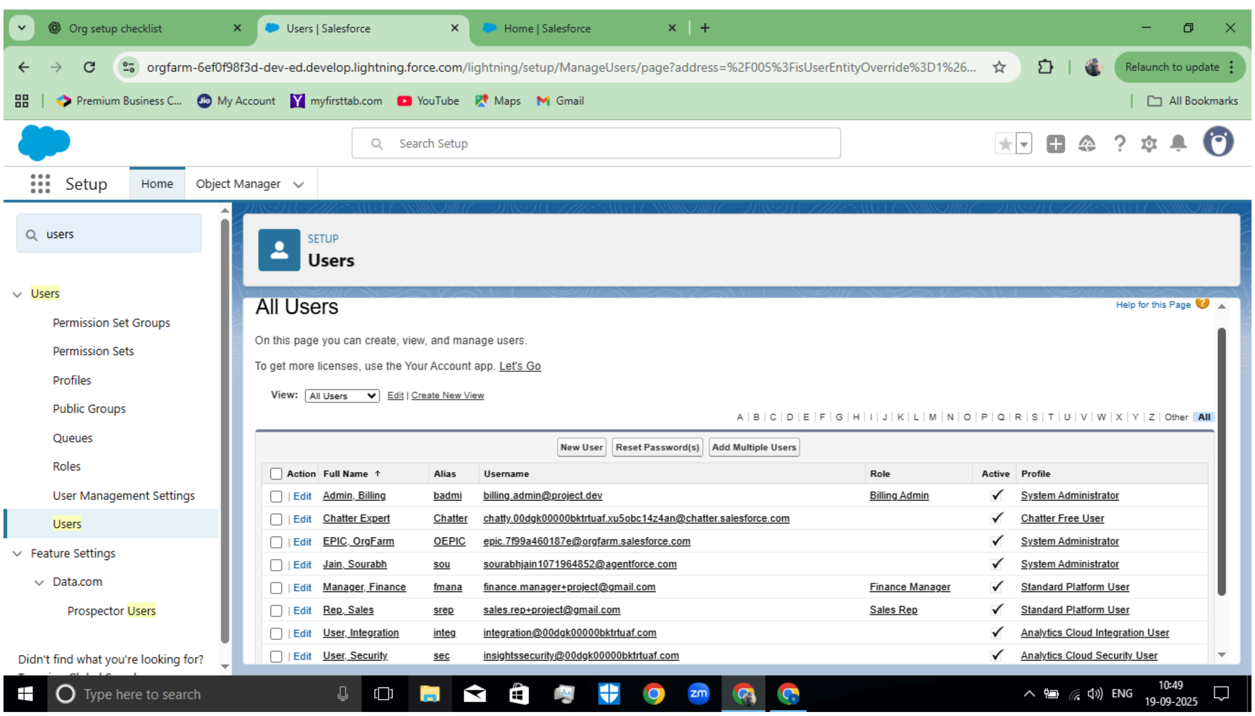
2. Company Profile Setup: Add company info, time zone, currency.

3. Business Hours: Define working hours (9am–6pm) for support.

4. Fiscal Year Settings: Standard (Jan–Dec) for revenue tracking.

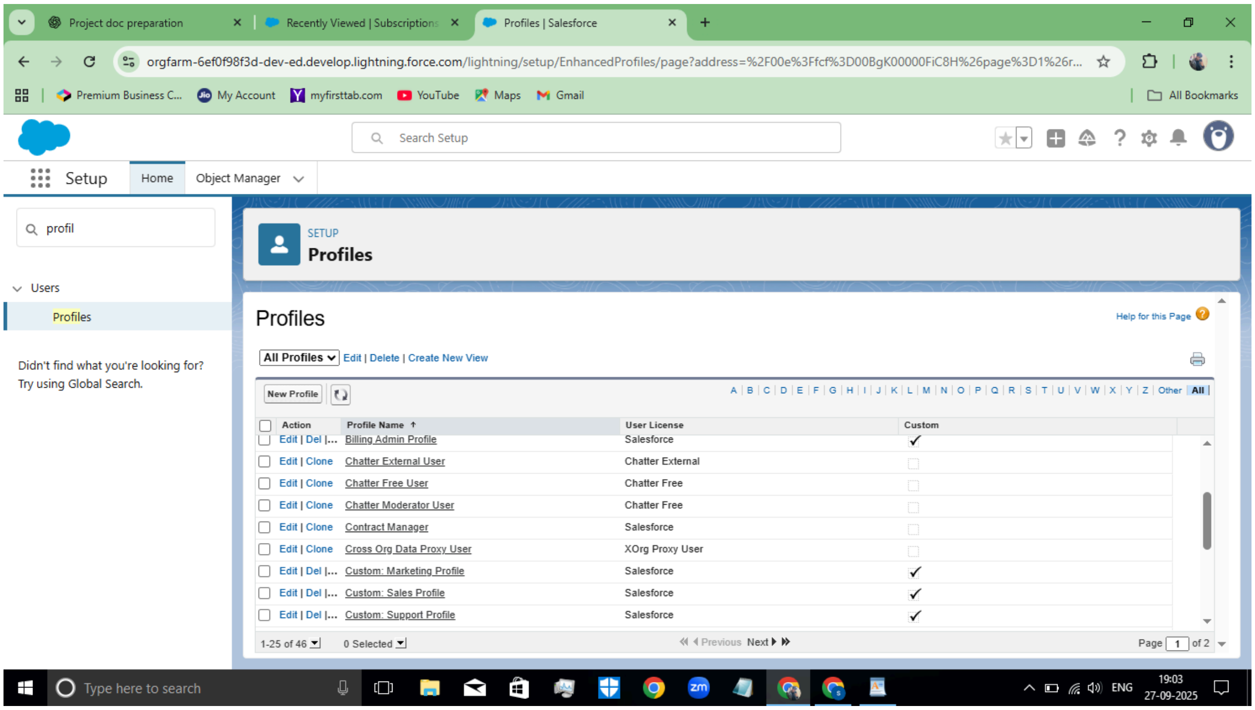


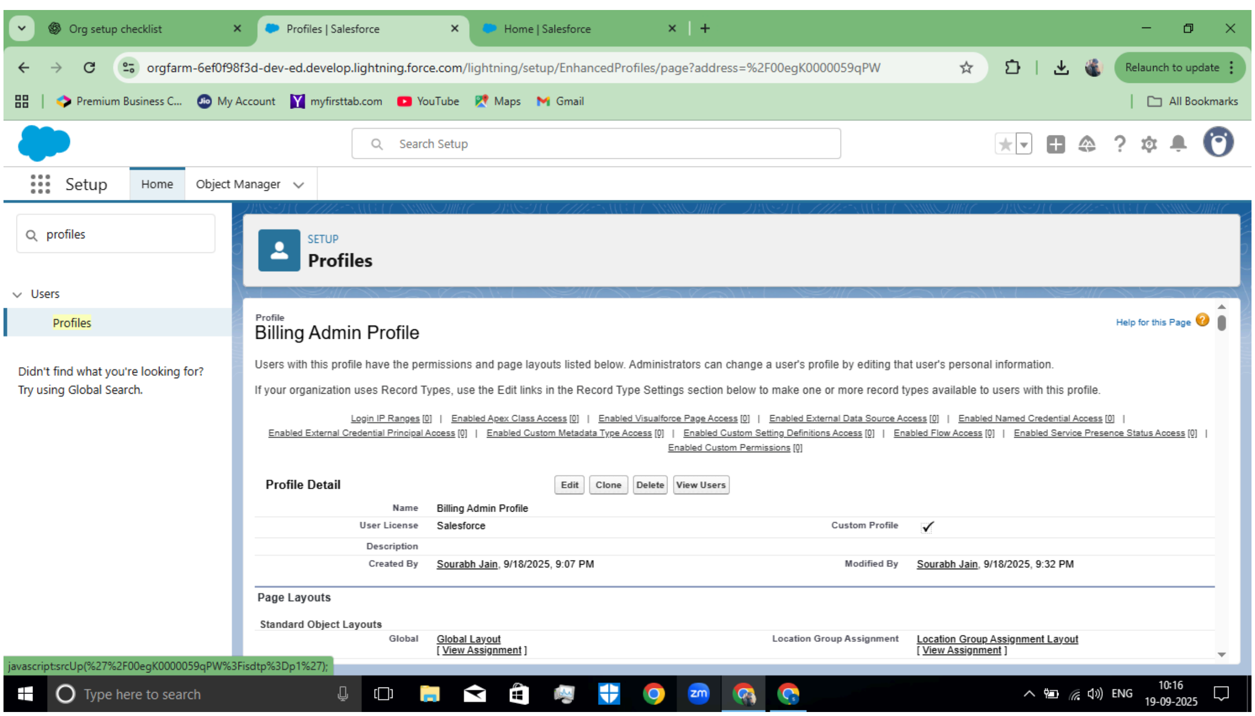
5. User Setup: Create Billing Manager, Finance User, Sales Rep



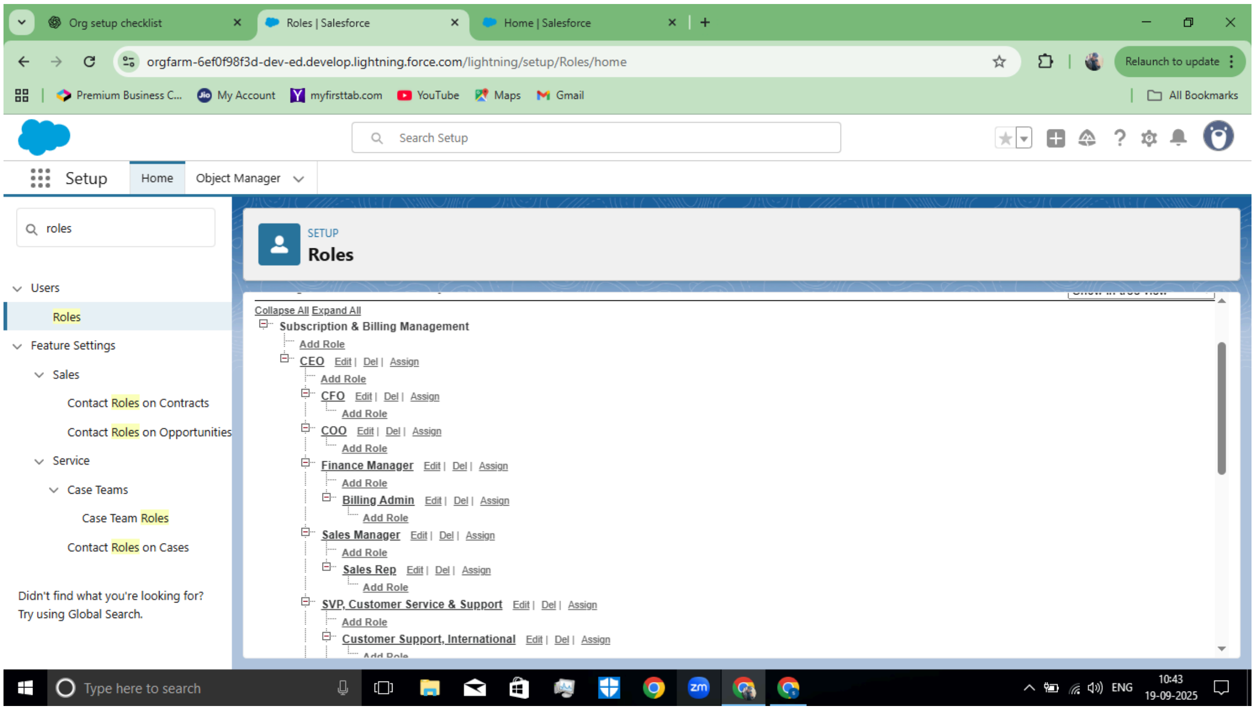
6. Profiles:

   - Finance: Access to invoices & reports.

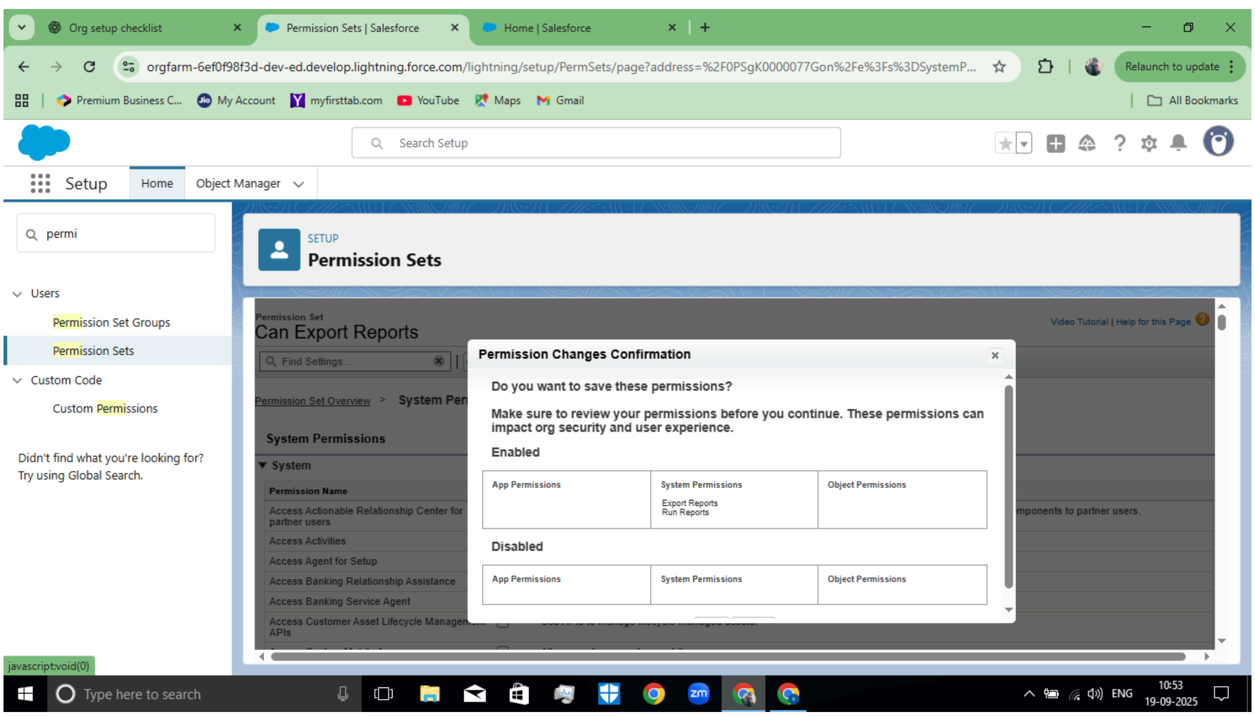


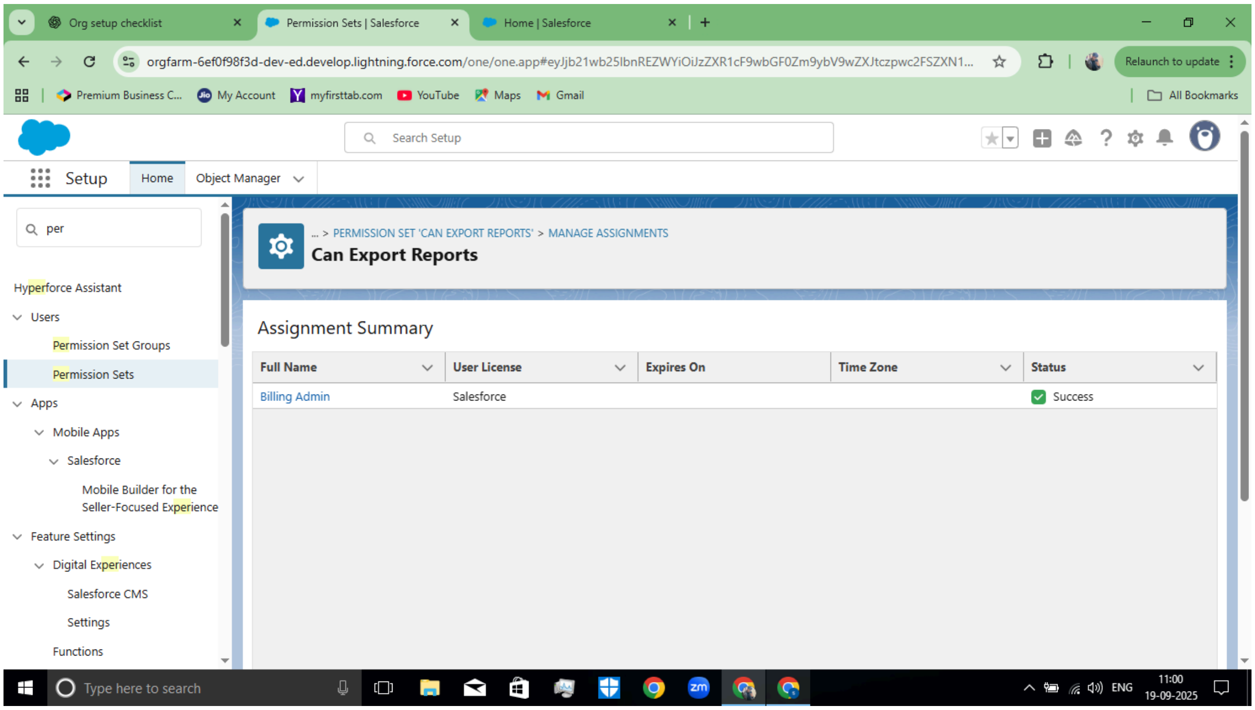


7. Roles: Finance Manager → Agents below.



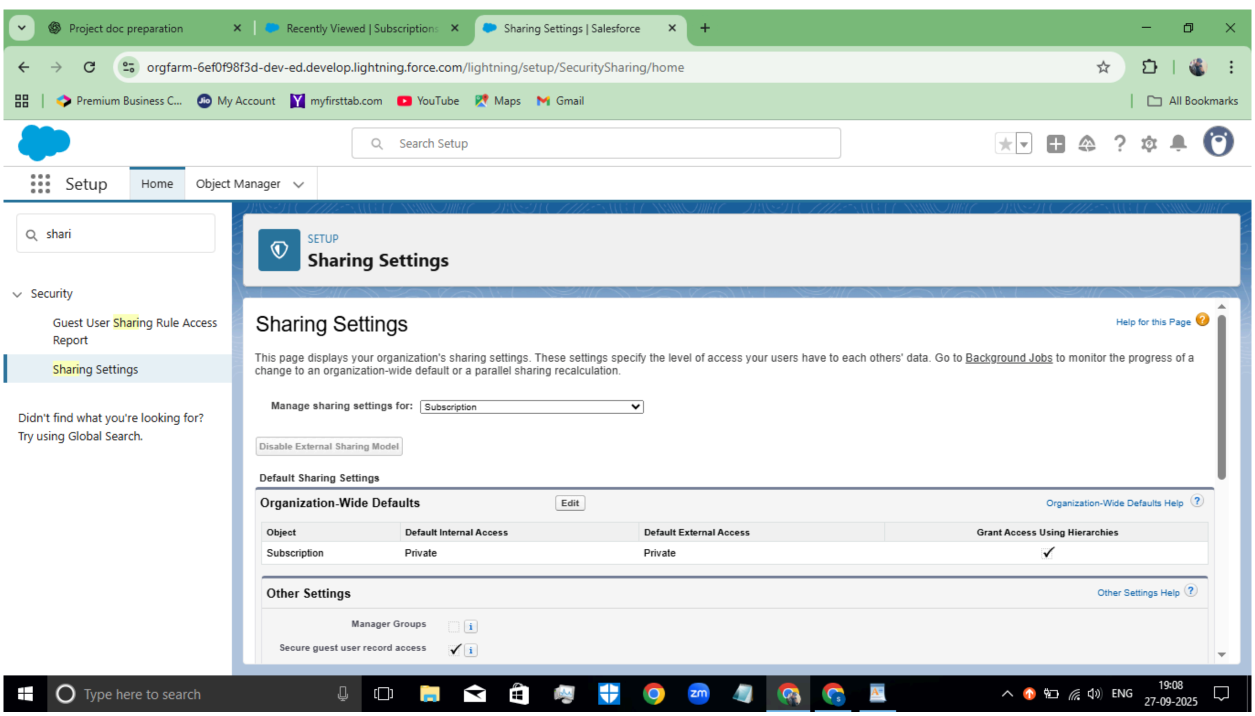
8. Permission Sets: Extra access (e.g., Reports).



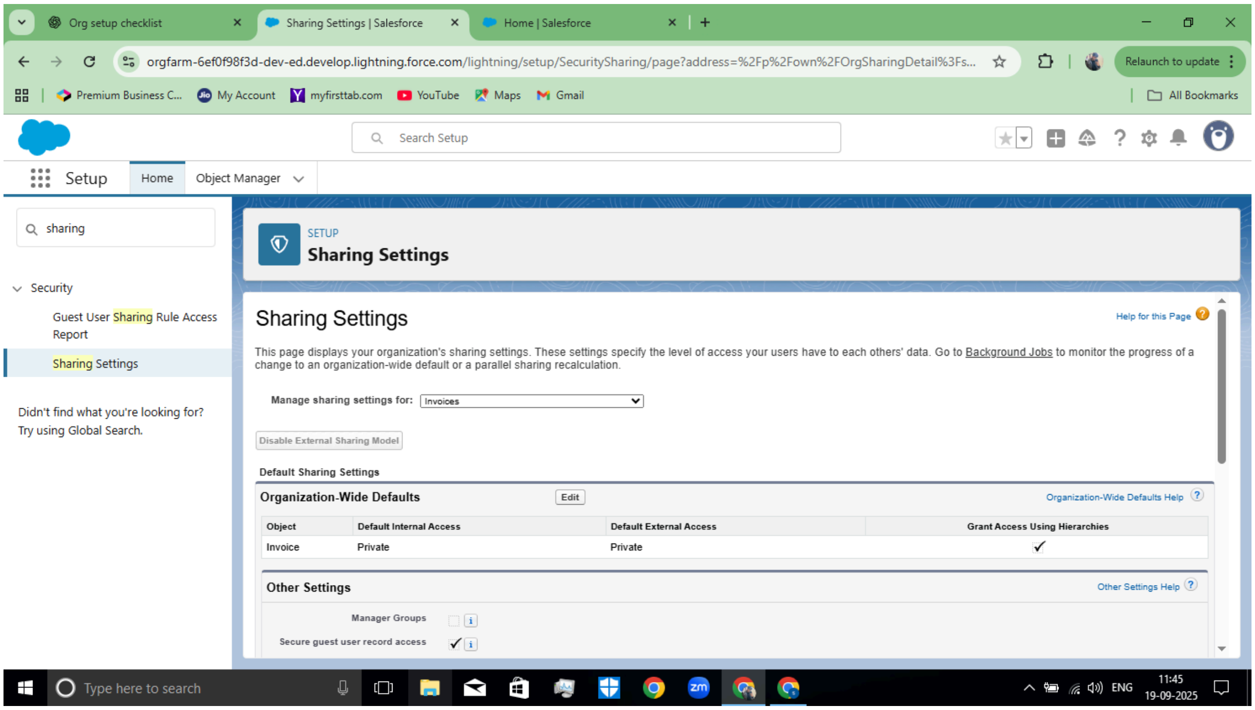


9. OWD:

   - Subscription: Private.



- Invoice: Private.



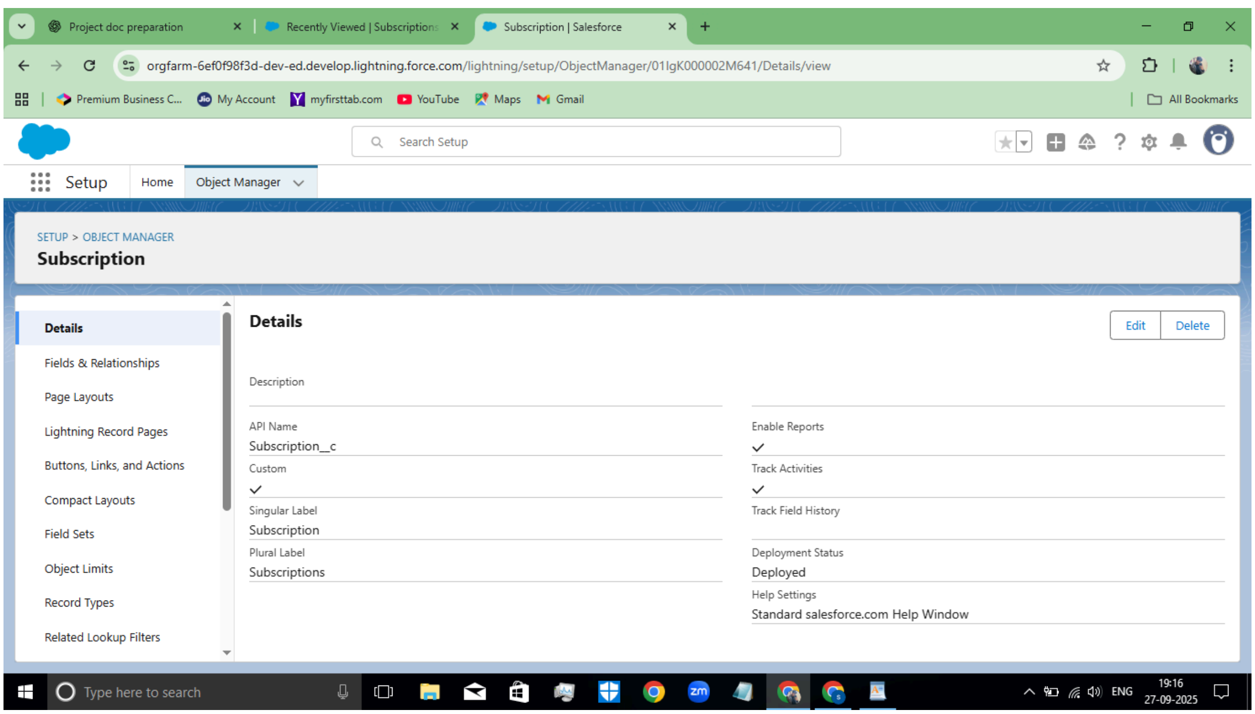
Phase 3: Data Modeling & Relationships

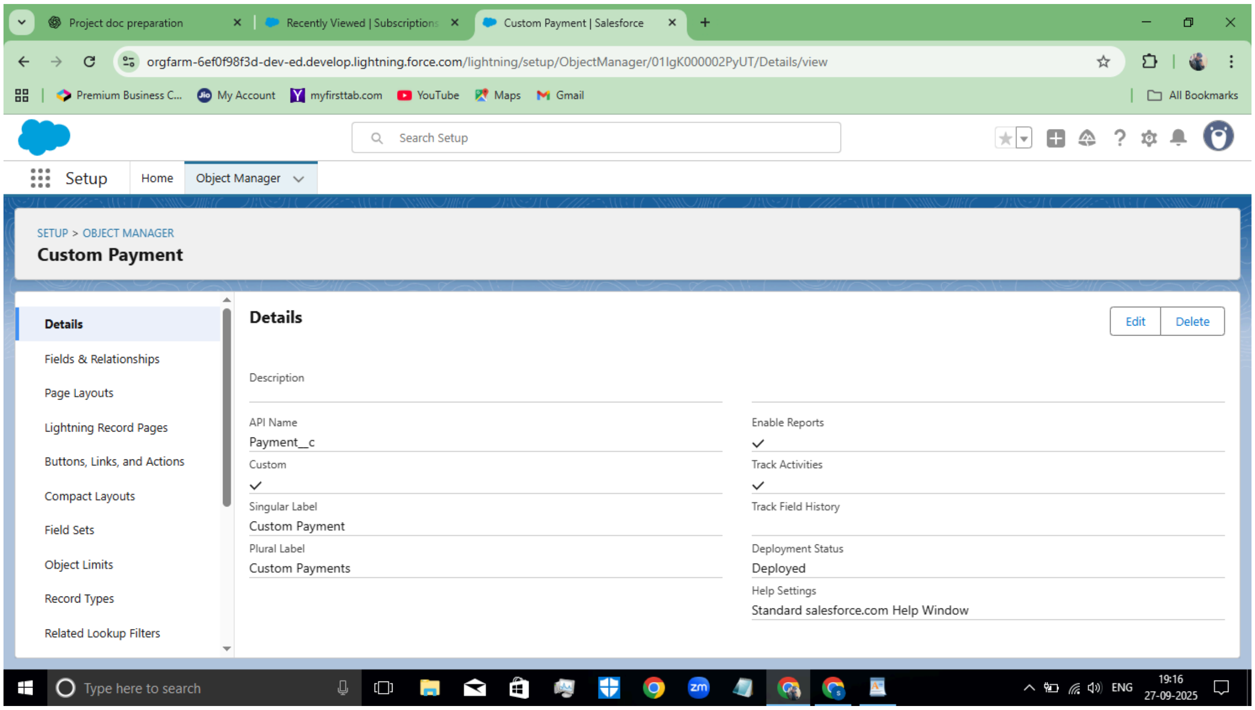
Goal : Design and implement a scalable data model in Salesforce to support subscription billing business processes.

1. Objects

    - Standard: Account (customer), Contact (billing contact), Product.

    - Custom Objects :
    - Subscription__c - To store subscription details.
    - Invoice__c - To store invoices linked to subscriptions.
    - Payment__c - To track payments against invoices.

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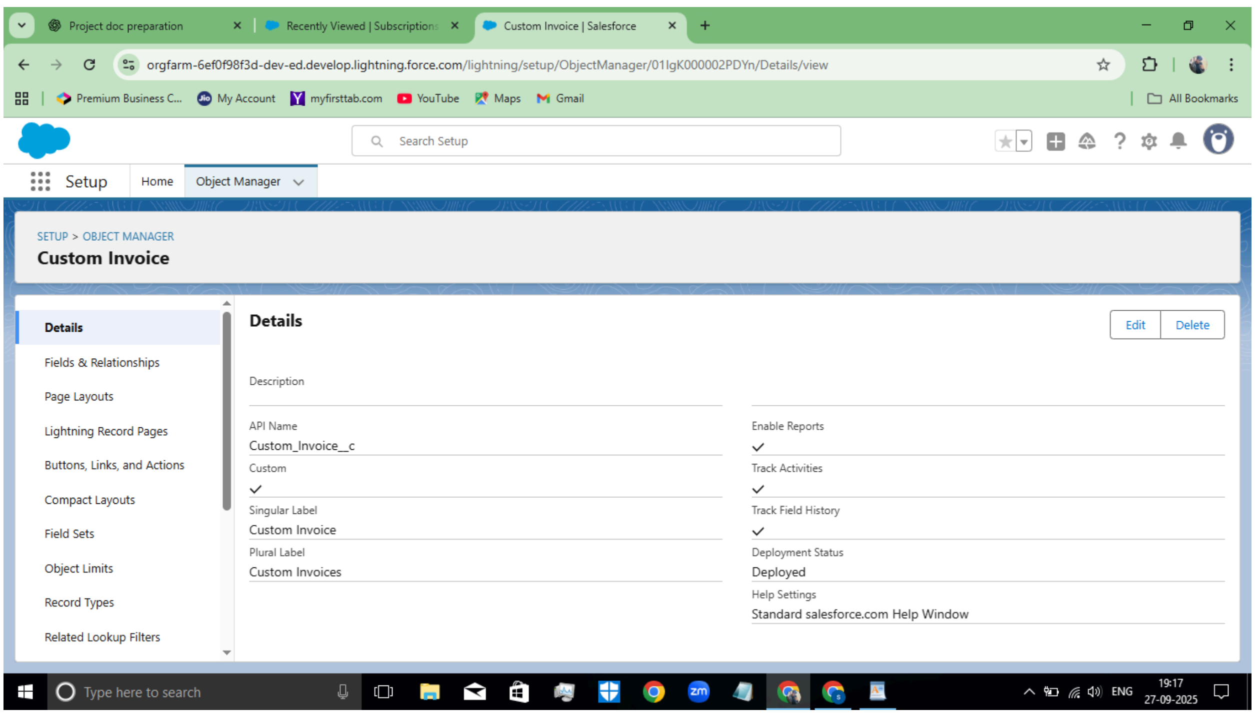
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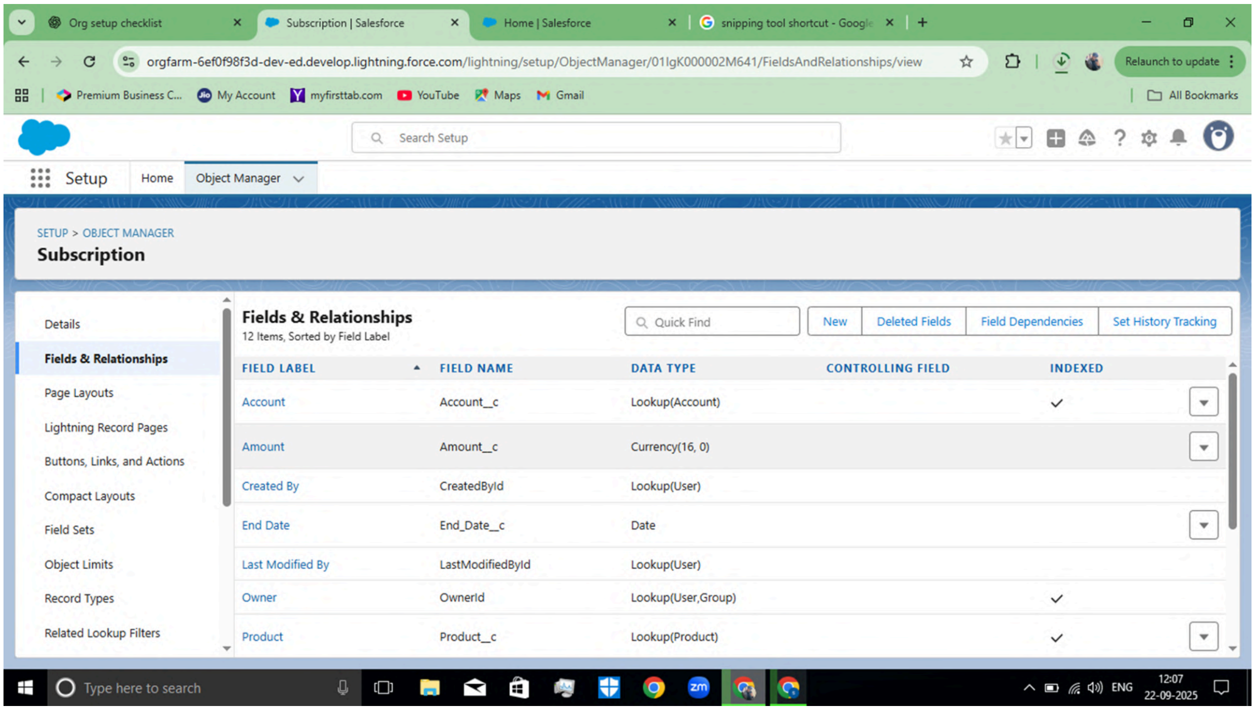
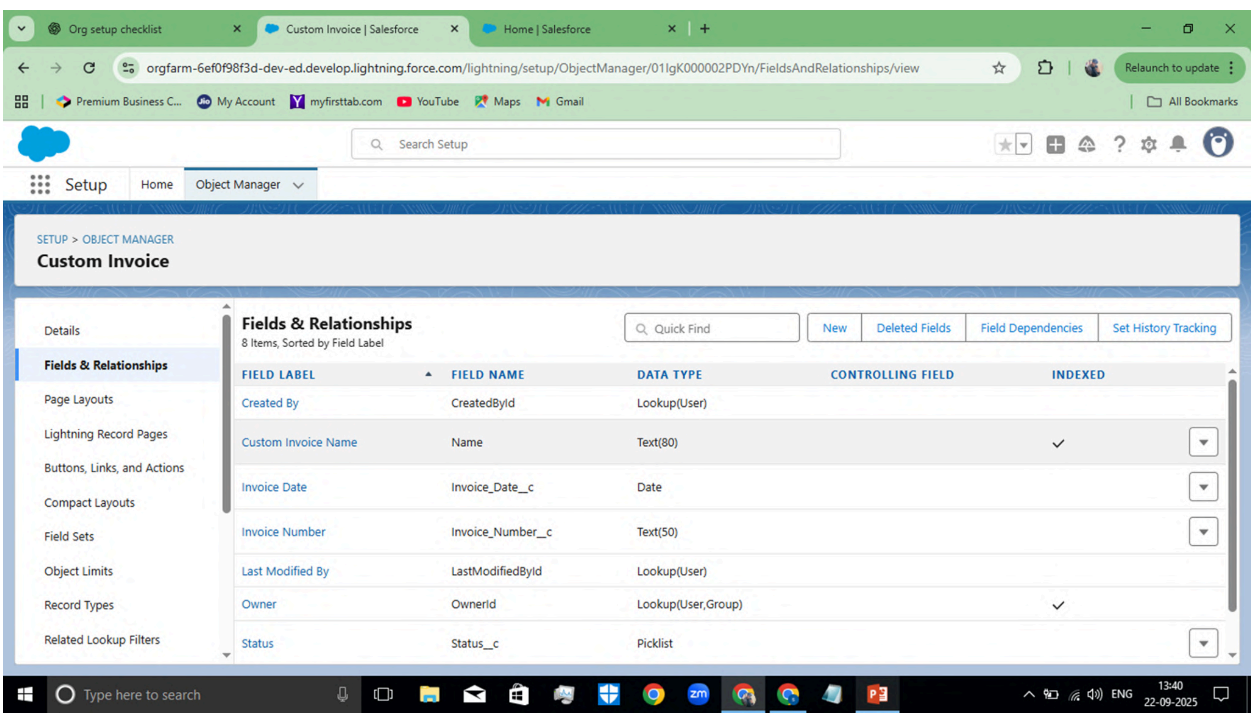
2. Fields

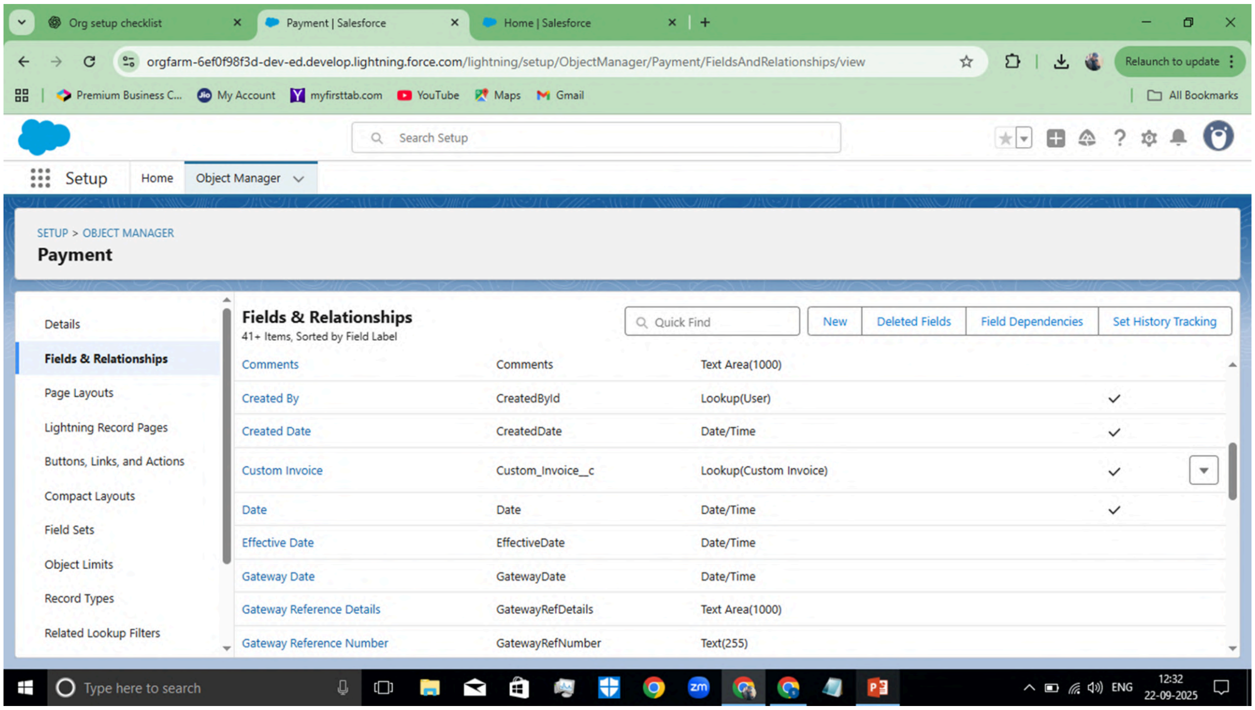
- Subscription: Start Date, End Date, Status, Plan Type.



- Invoice: Invoice Date, Due Date, Total Amount, Status.

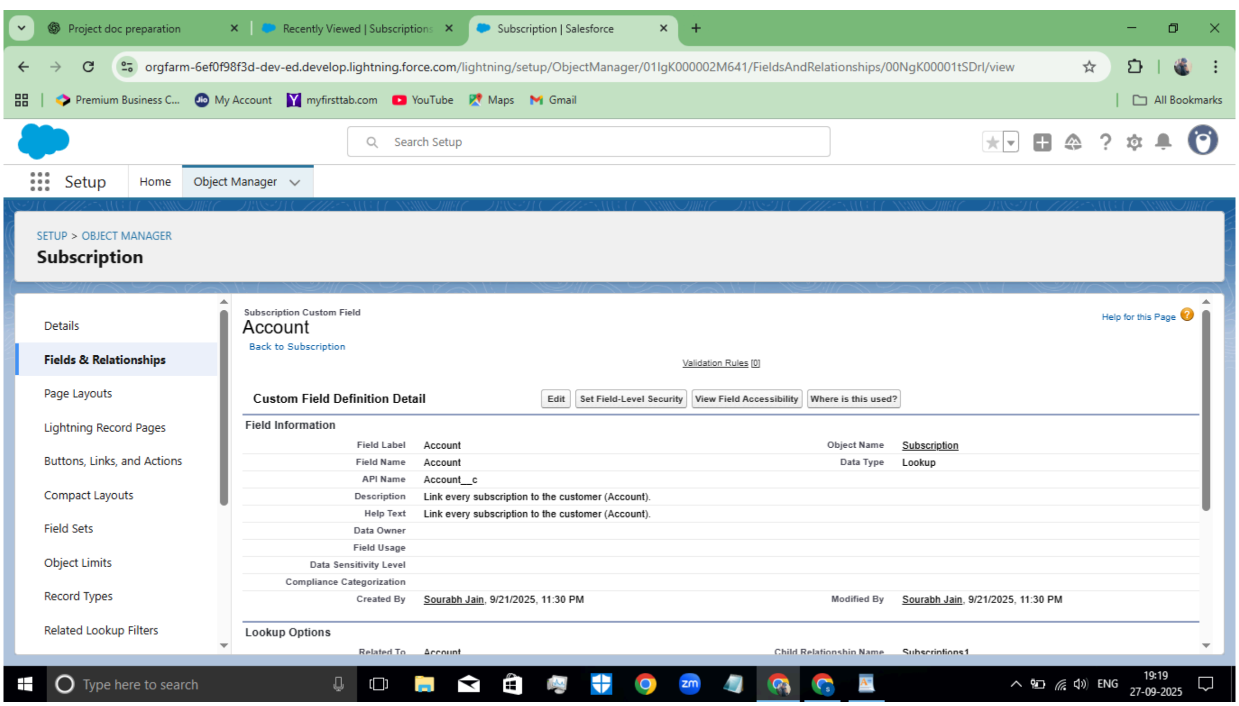


- Payment: Amount, Method, Status, Payment Date.

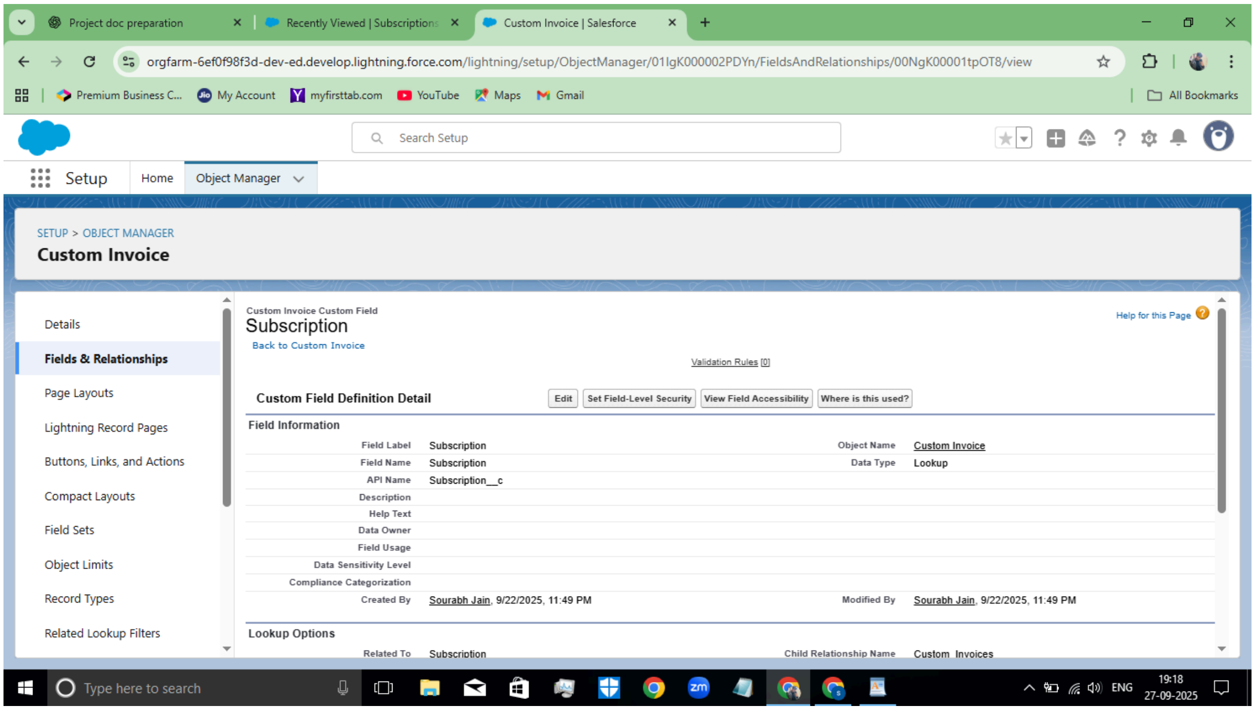


3. Relationships

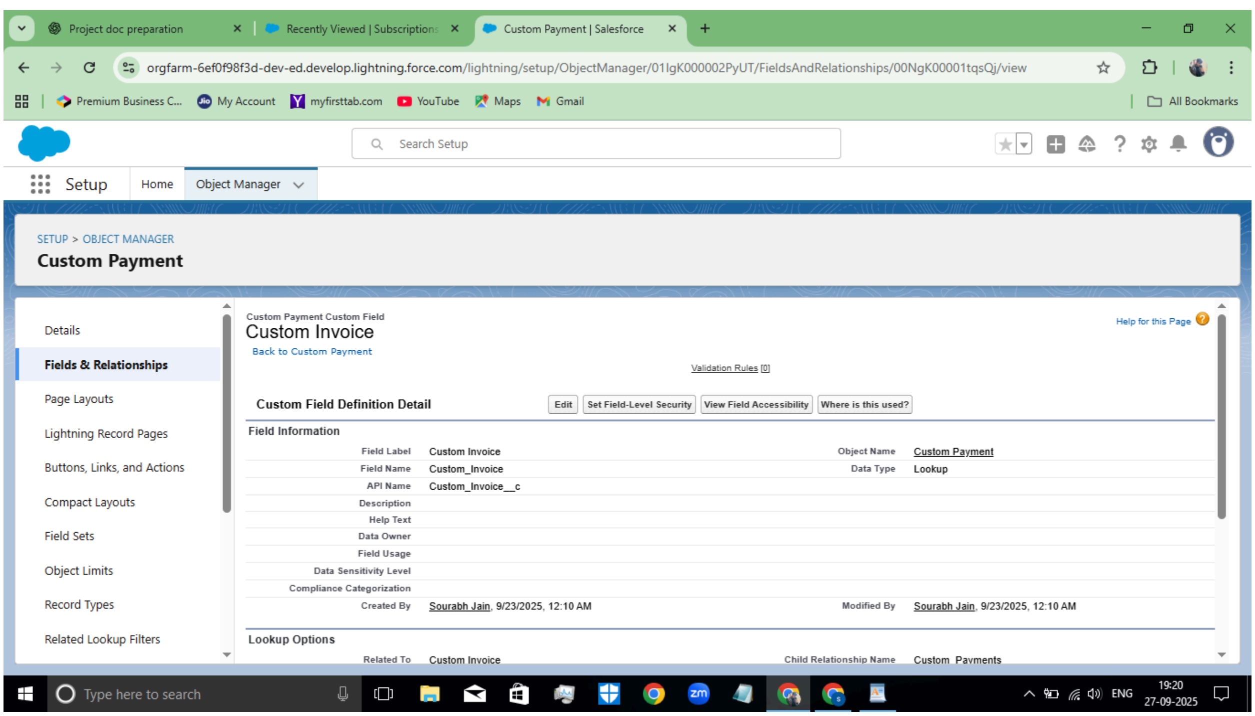
- Account ↔ Subscription (Lookup).



- Subscription ↔ Invoice (Master-Detail)

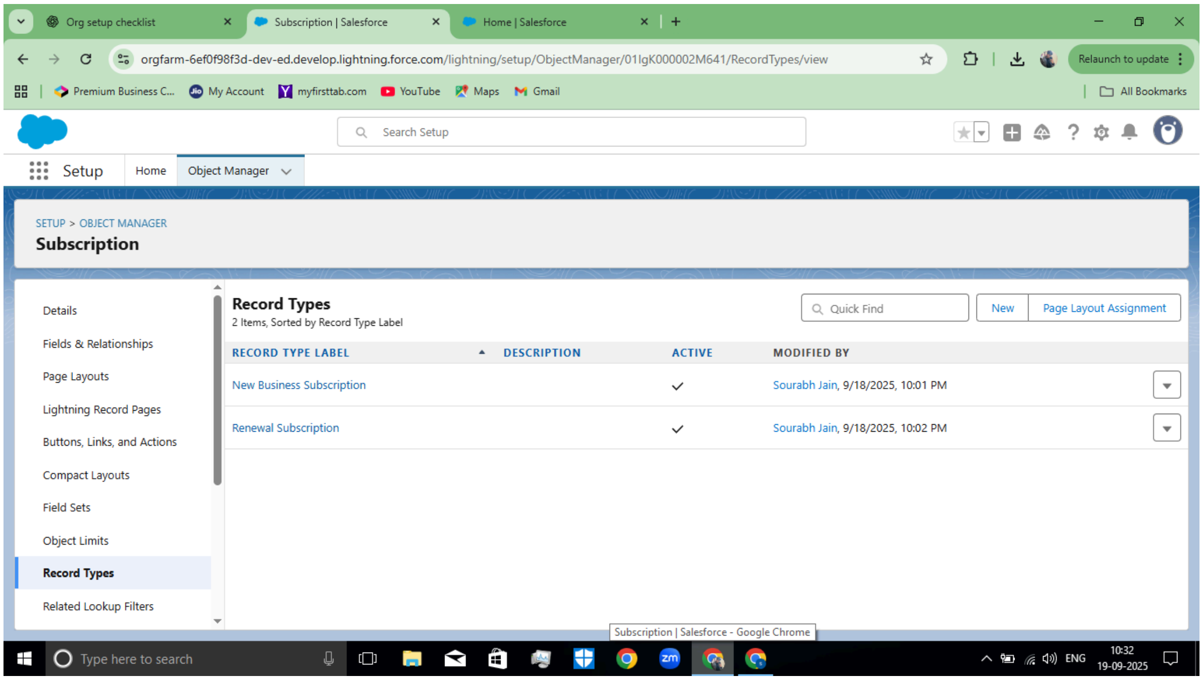


- Invoice ↔ Payment (Lookup)



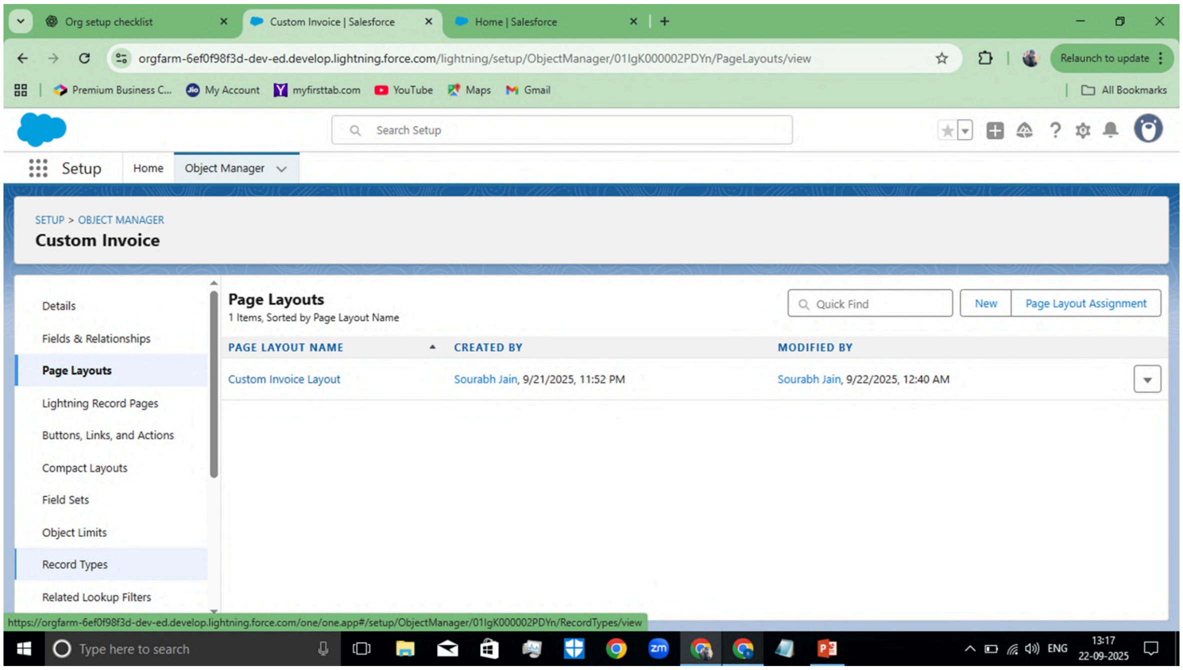
4. Record Types

    ○ Subscription: “Monthly Plan” vs “Annual Plan.”

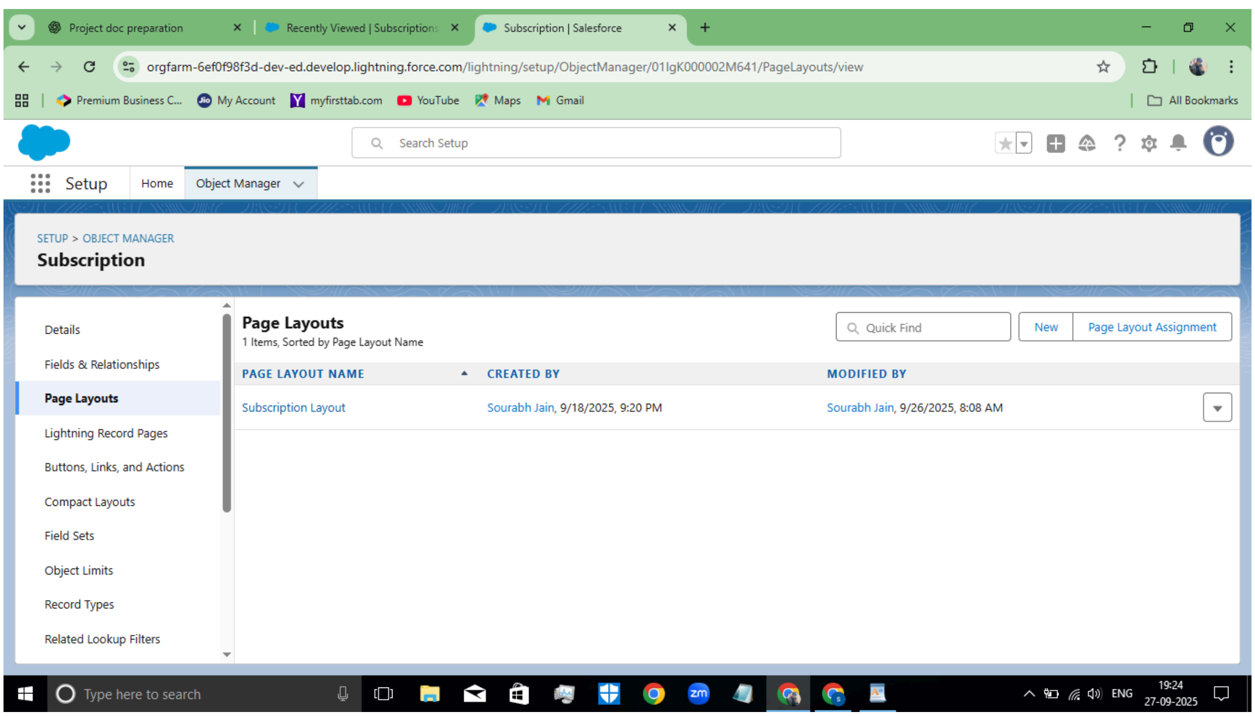


5. **Page Layouts :** Custom page layouts were created for each object to organize fields and related lists. Subscription related list added to Account page layout for quick access.

- Account page: Show related Subscriptions, Invoices

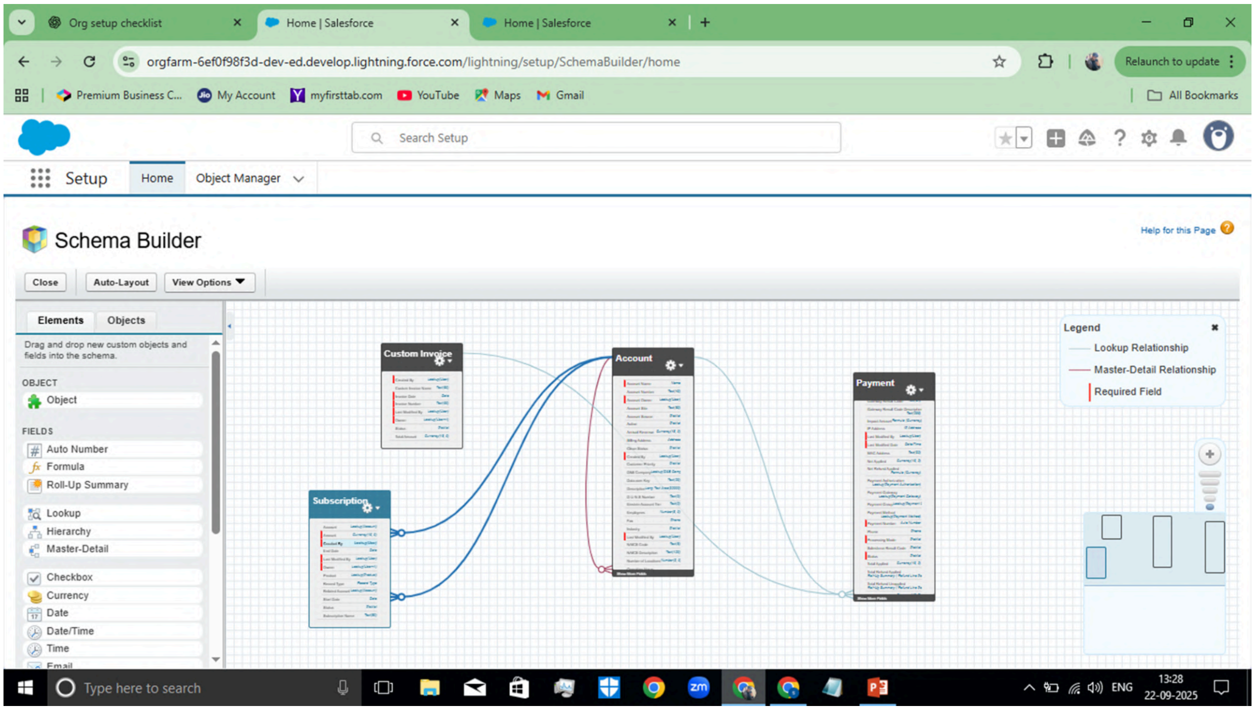


- Subscription page: Show Invoices, Renewal Date.

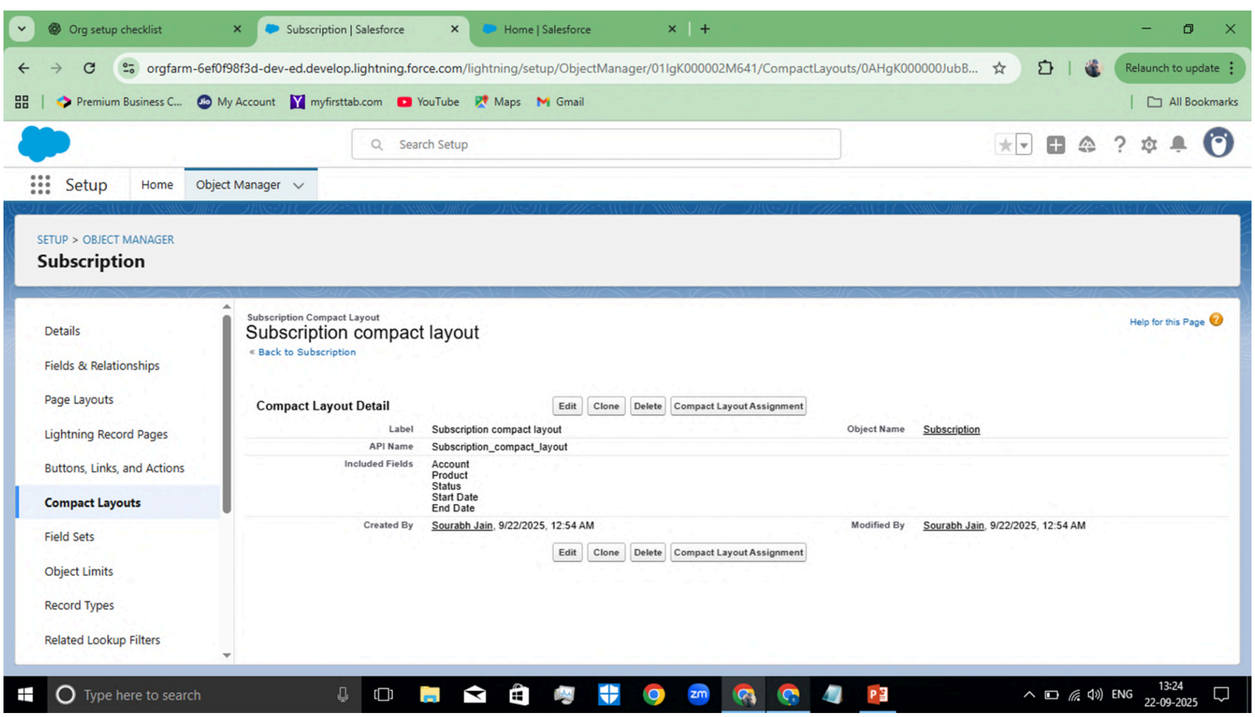


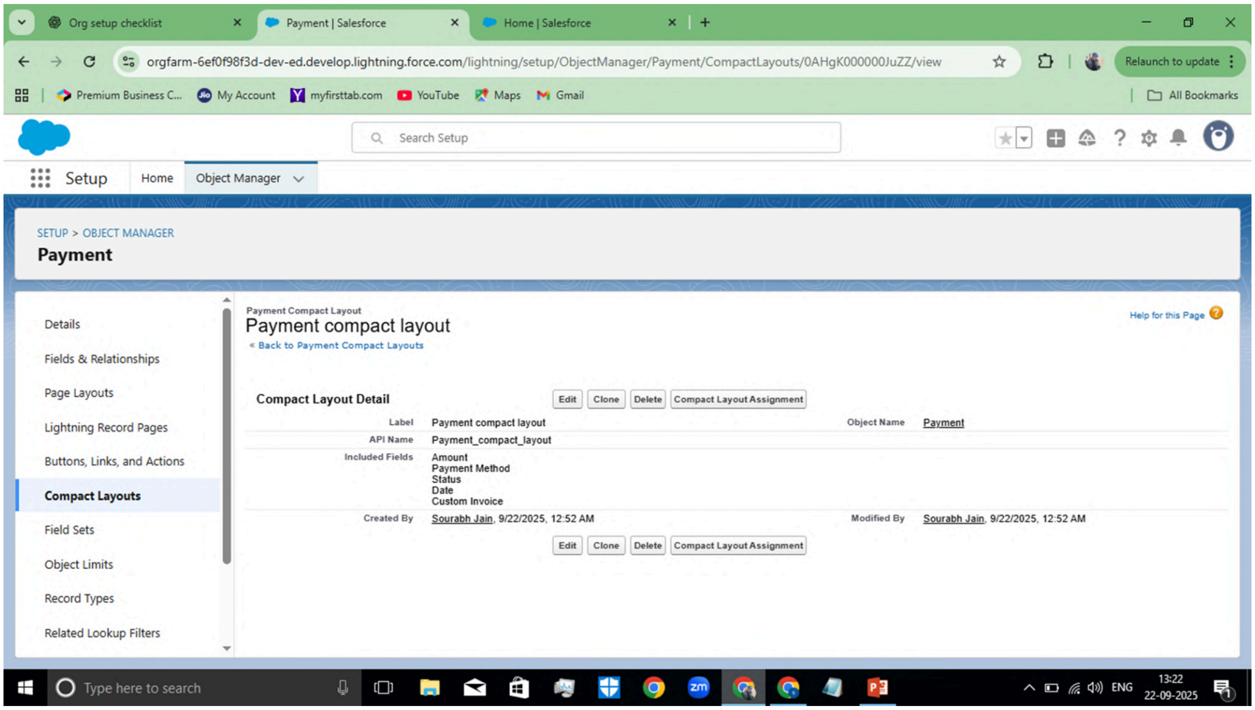
6. Schema Builder

   ○ Visualize relationships between Subscription, Invoice, Payment.



7. Compact Layout

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Created By
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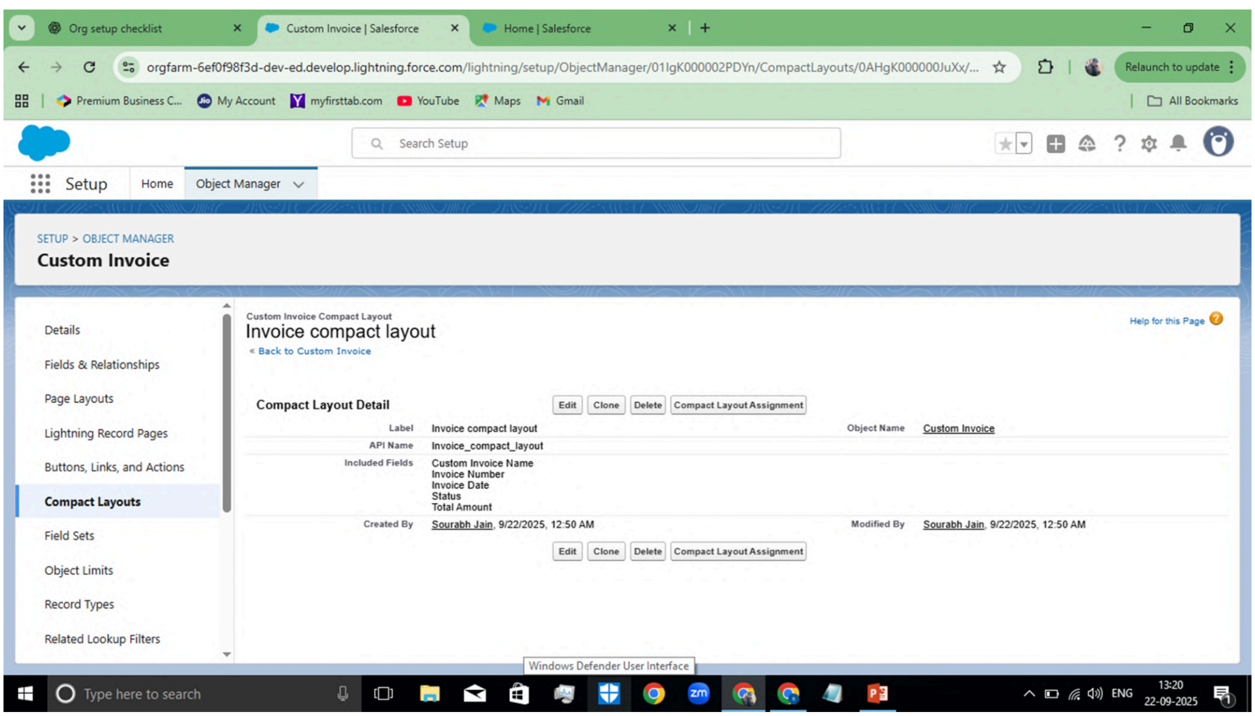
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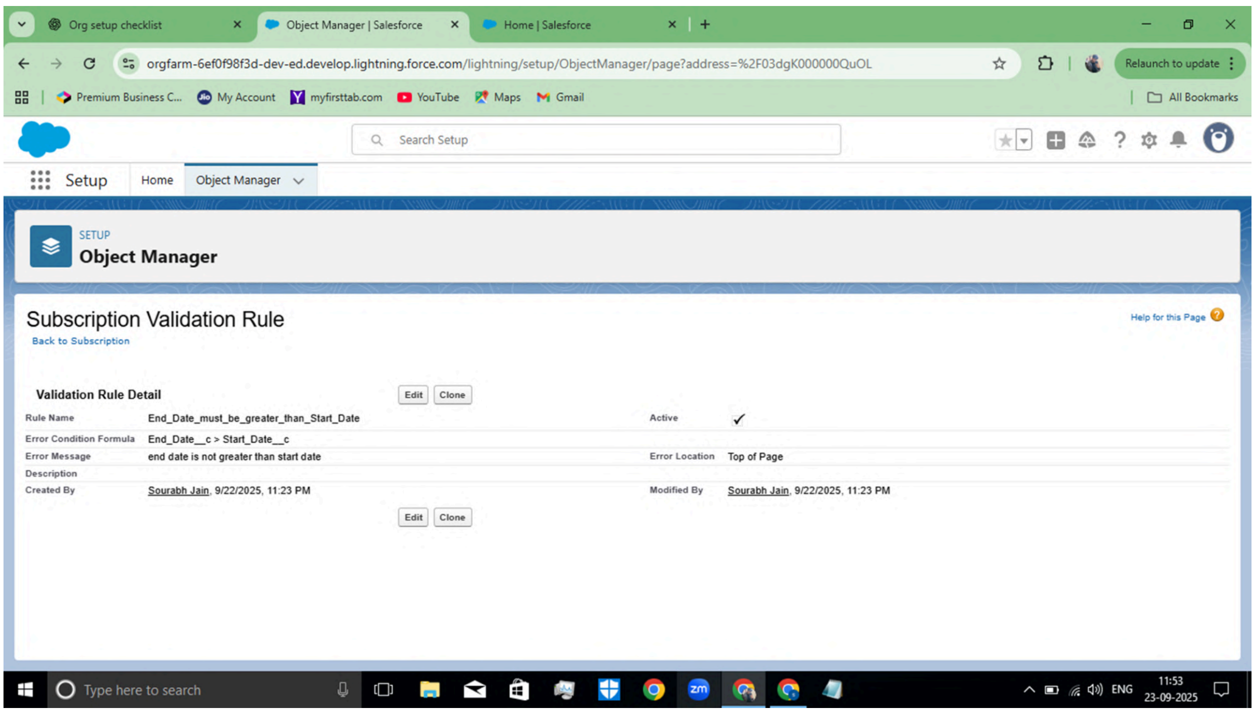
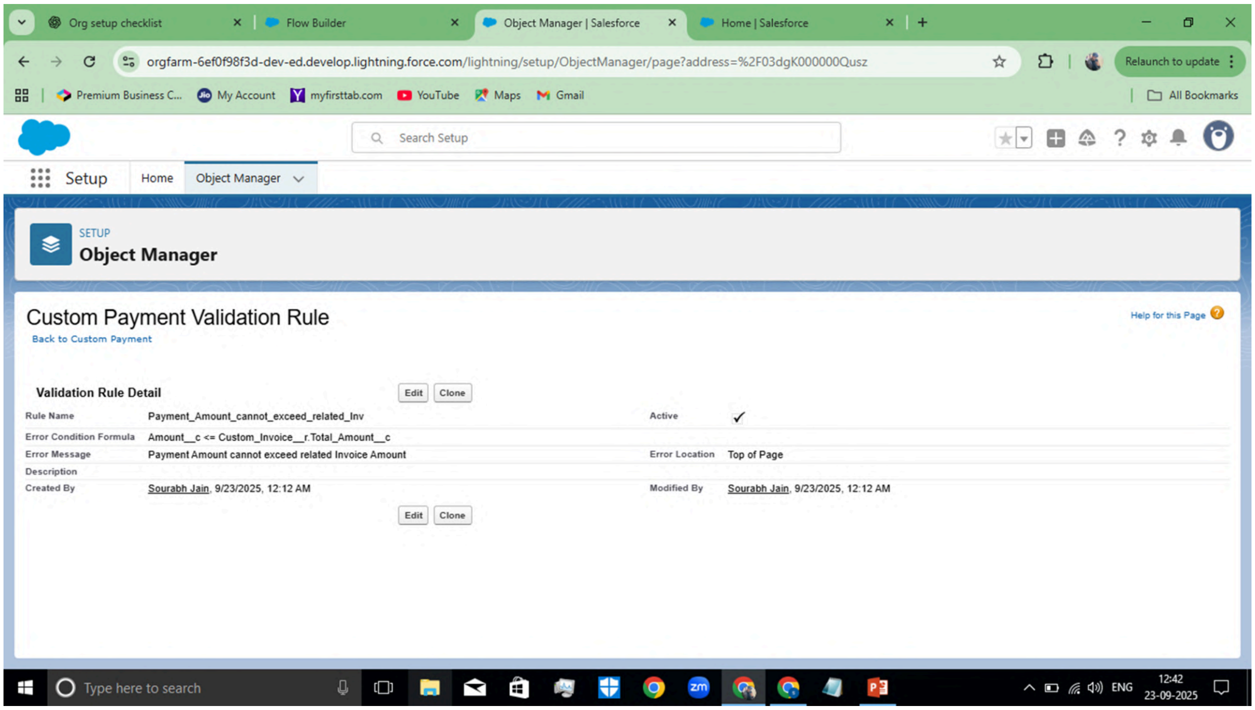
Phase 4 – Process Automation (Admin)

Goal : Streamline subscription and billing operations by automating recurring billing, invoice generation, and alerts using Salesforce declarative tools.

- Validation Rules (e.g., End Date > Start Date)

  Prevent_Zero_Invoice_Amount - prevents creation of invoices with zero amount.
  Payment_Amount_Validation - ensures Payment Amount <= Invoice Amount.

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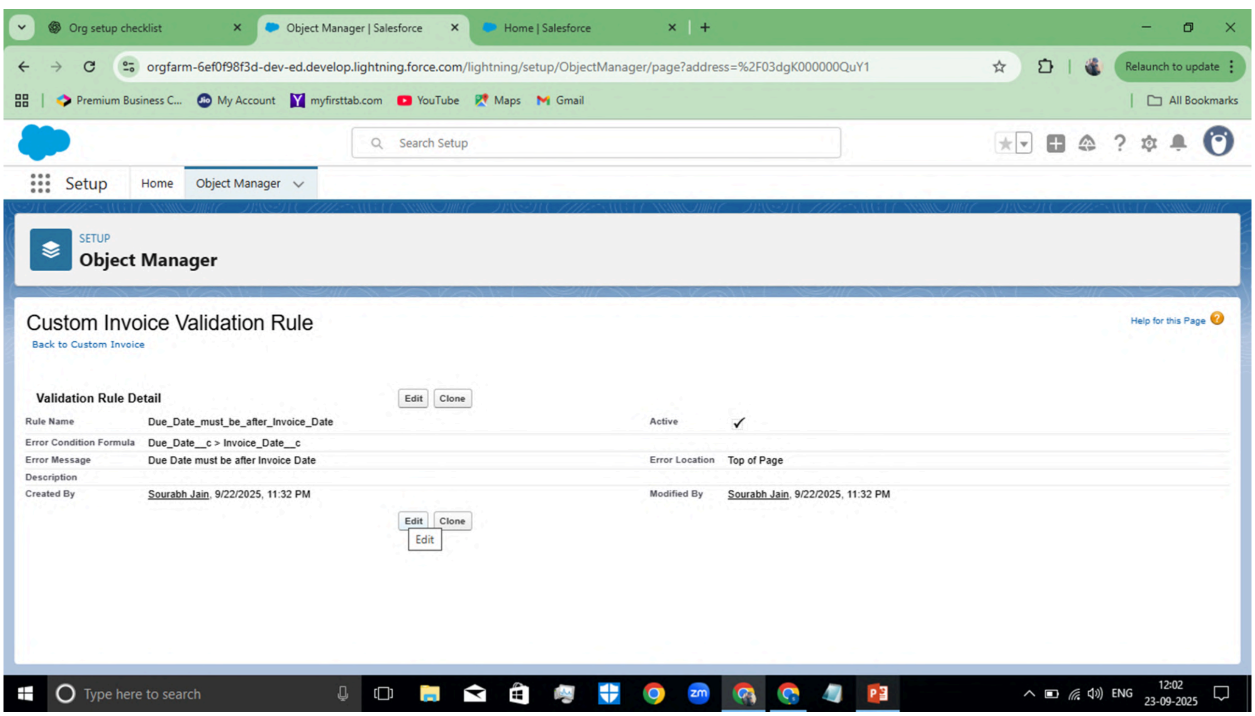
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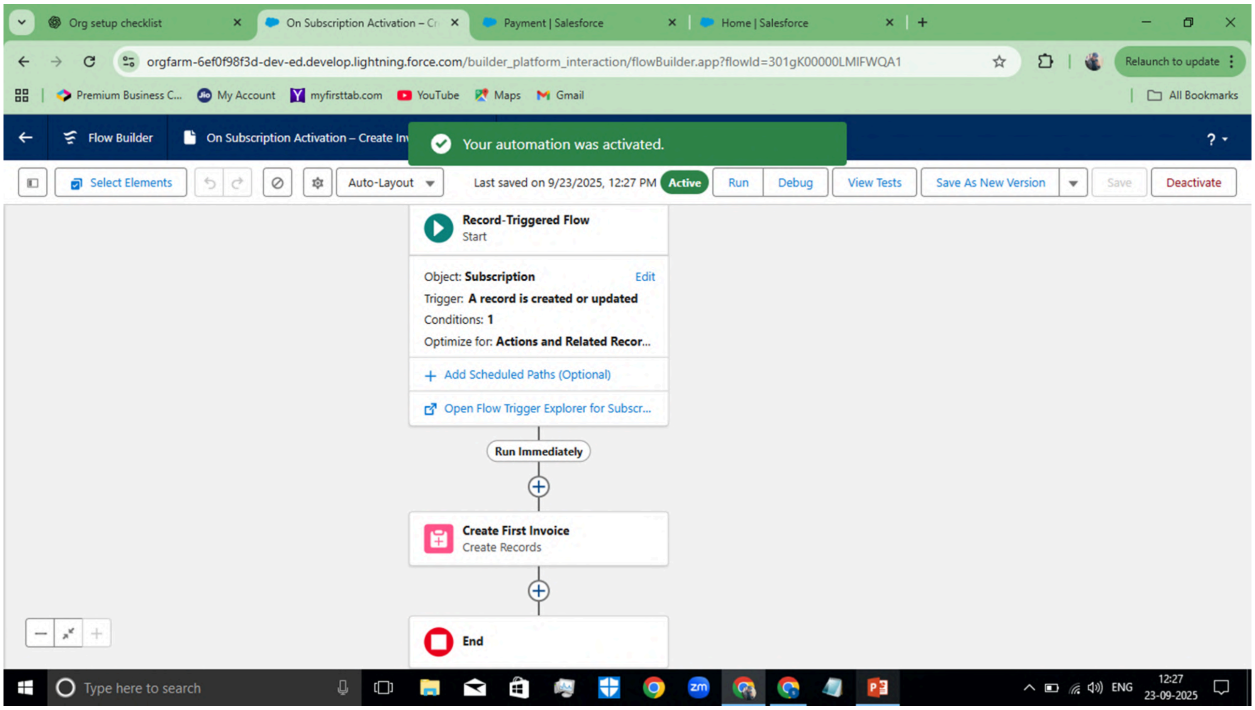
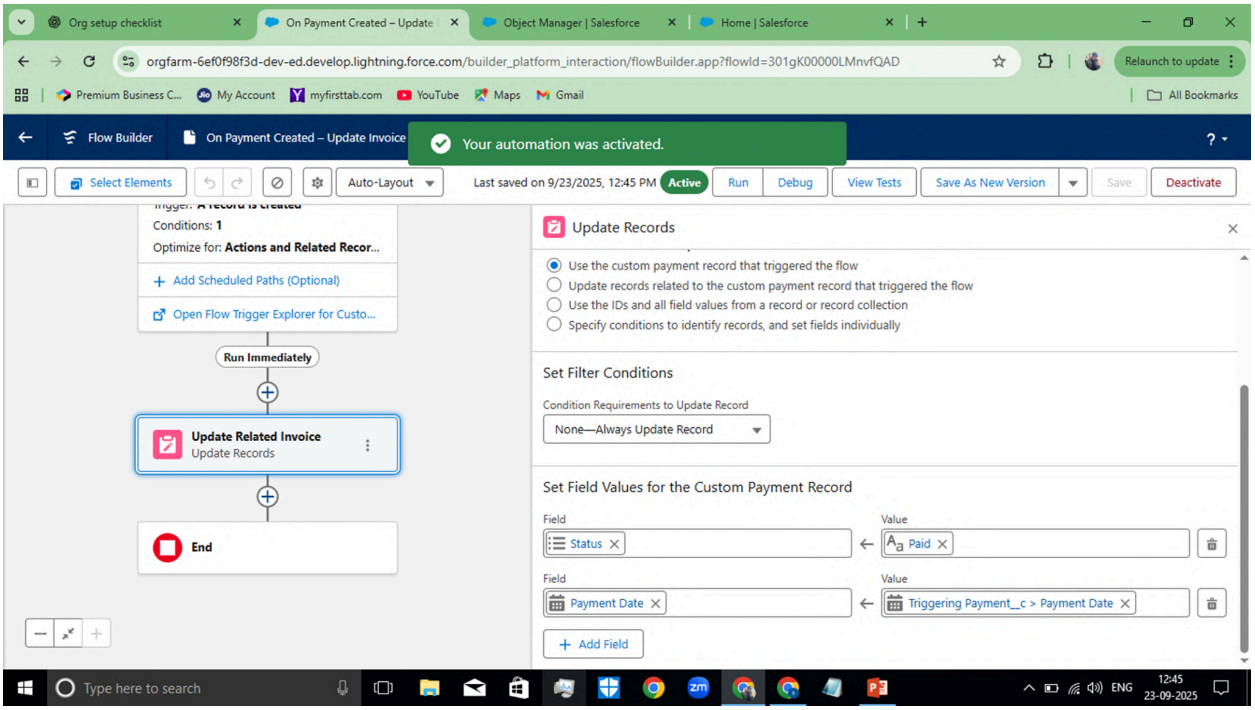
- **Build Record-Triggered Flows** : Automatically generate Invoice records at each billing cycle when Subscription is active. Auto-update Subscription Status to Expired after End Date.

– On Subscription Activation → Create first Invoice.

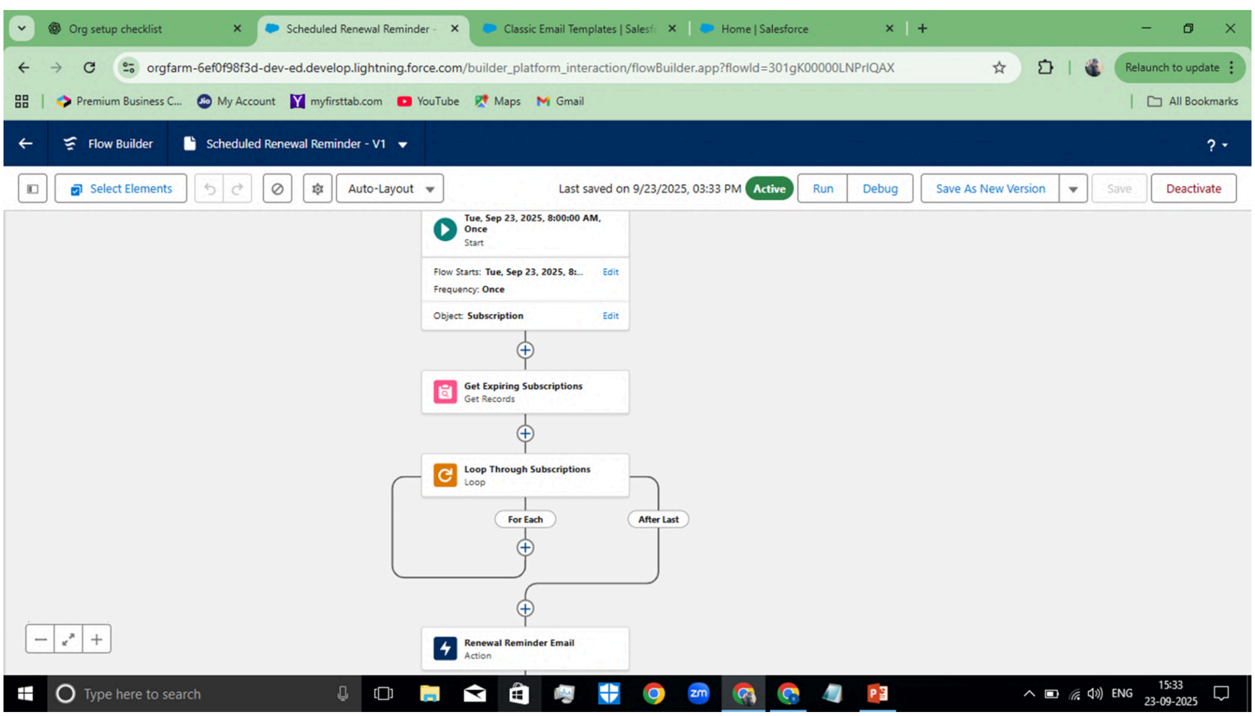
– On Payment Created → Update Invoice Status = Paid.



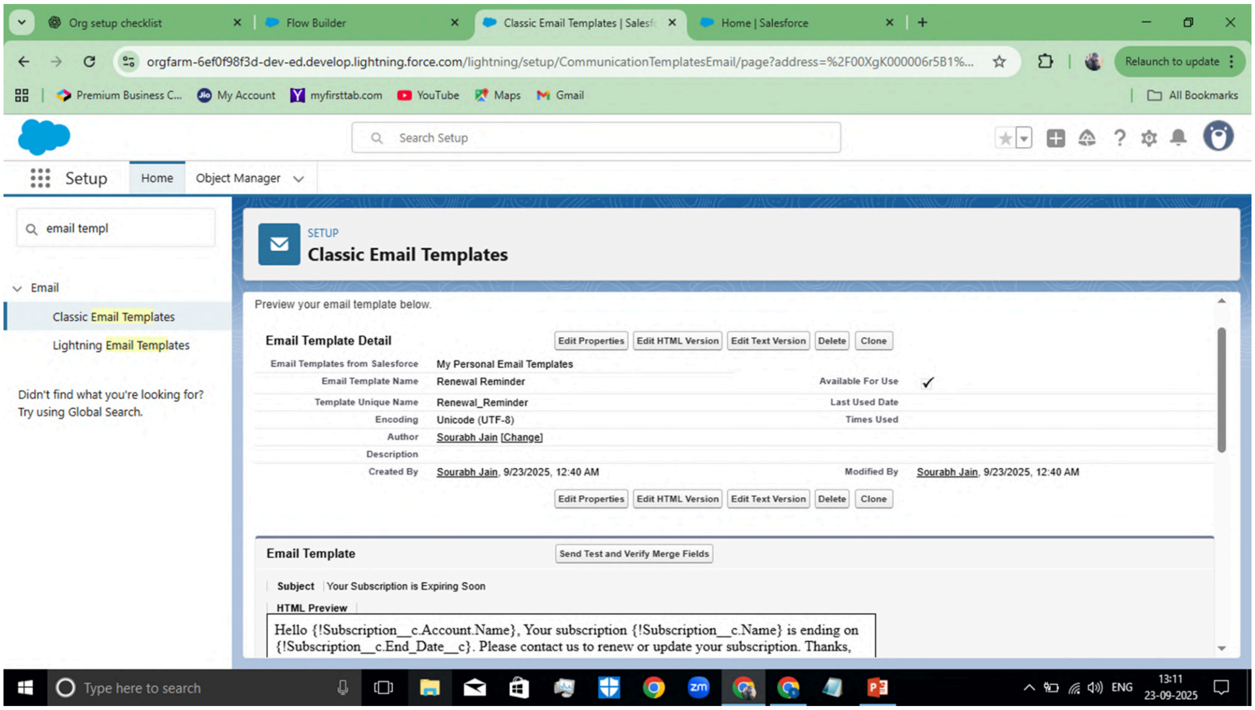
- Add Scheduled Flow to check expiring subscriptions daily → send renewal reminders.

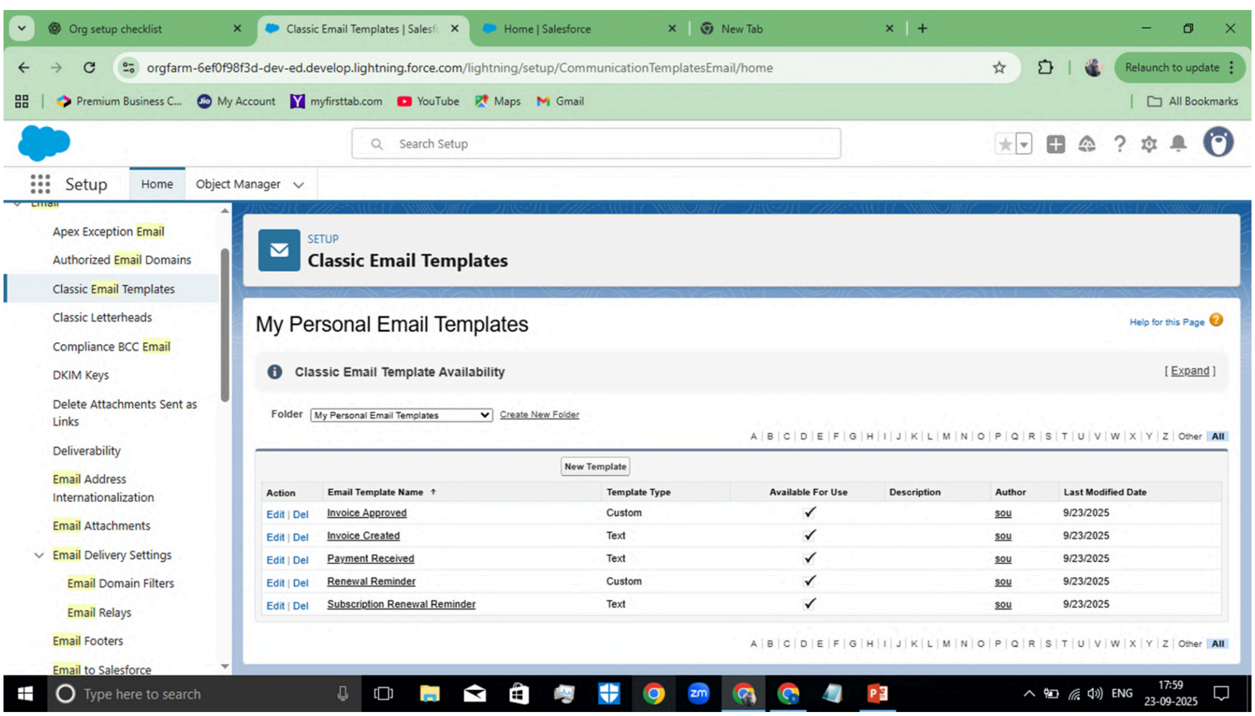


- Build an Approval Process for large invoices.

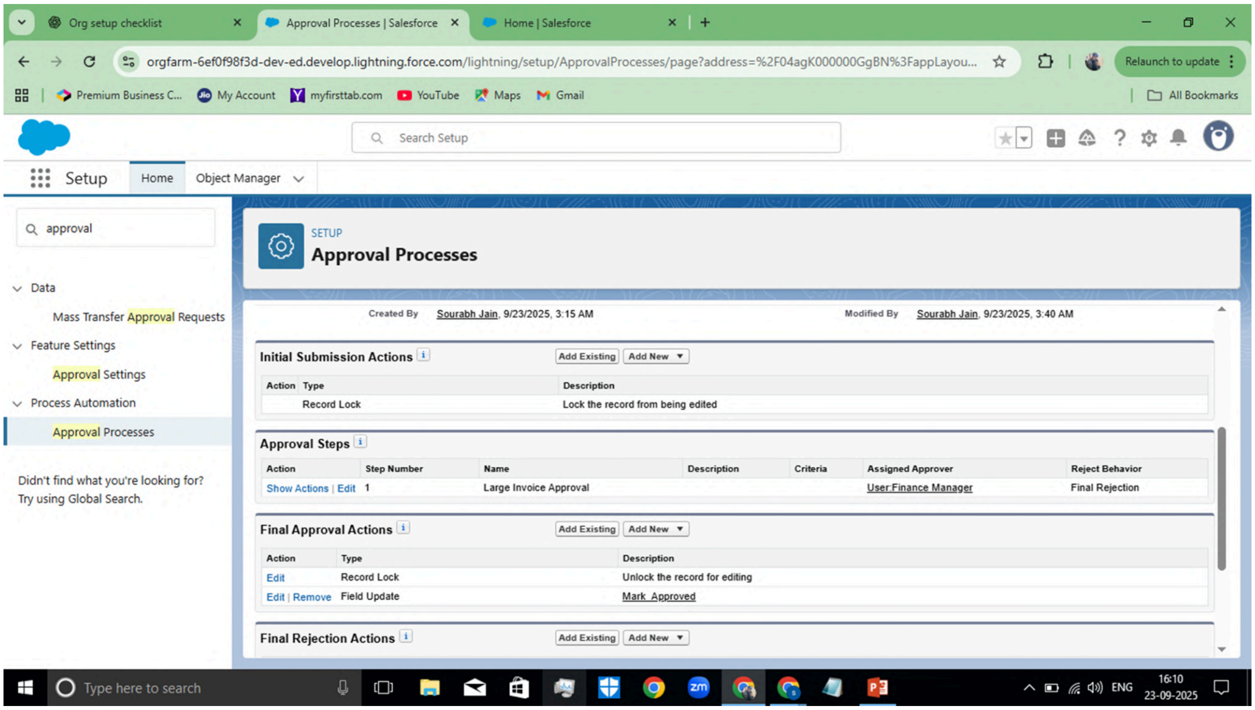


- Configure Email Alerts : Send renewal reminders 15 days before subscription end date and failed payment alerts immediately.





- Approval Process : Automate approval for high-value refunds routed to Finance Manager



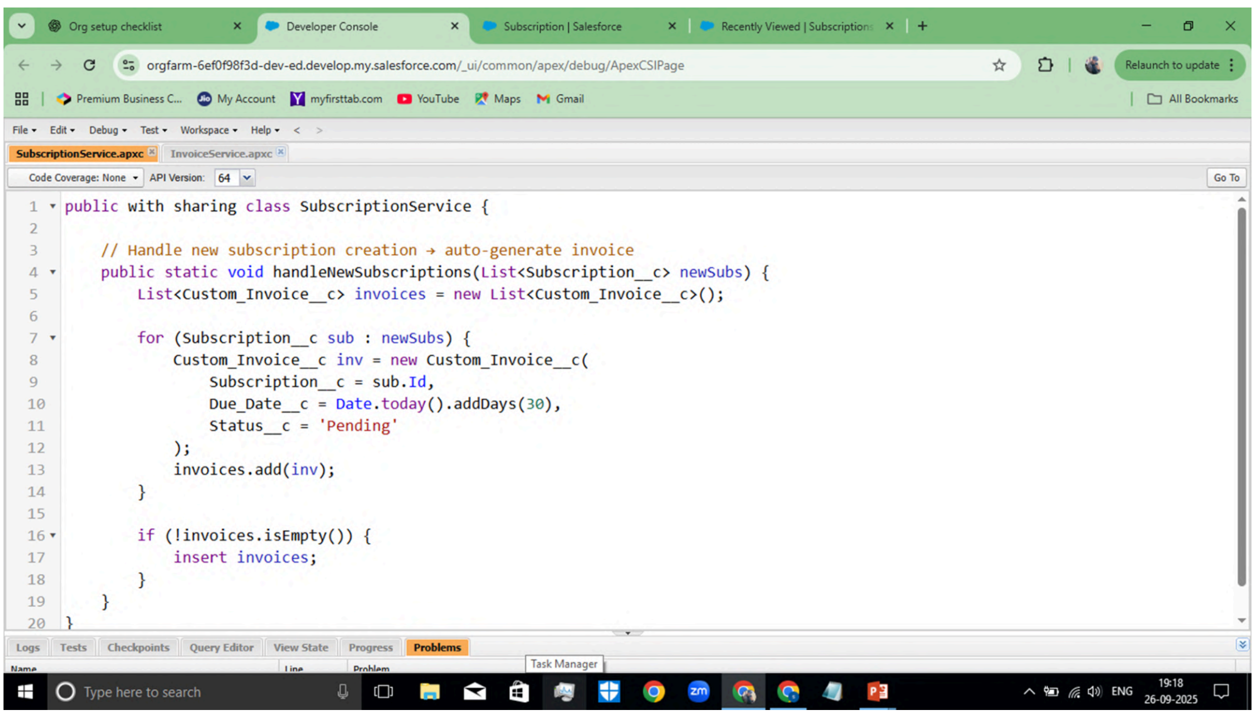
Phase 5 – Apex Programming (Developer)

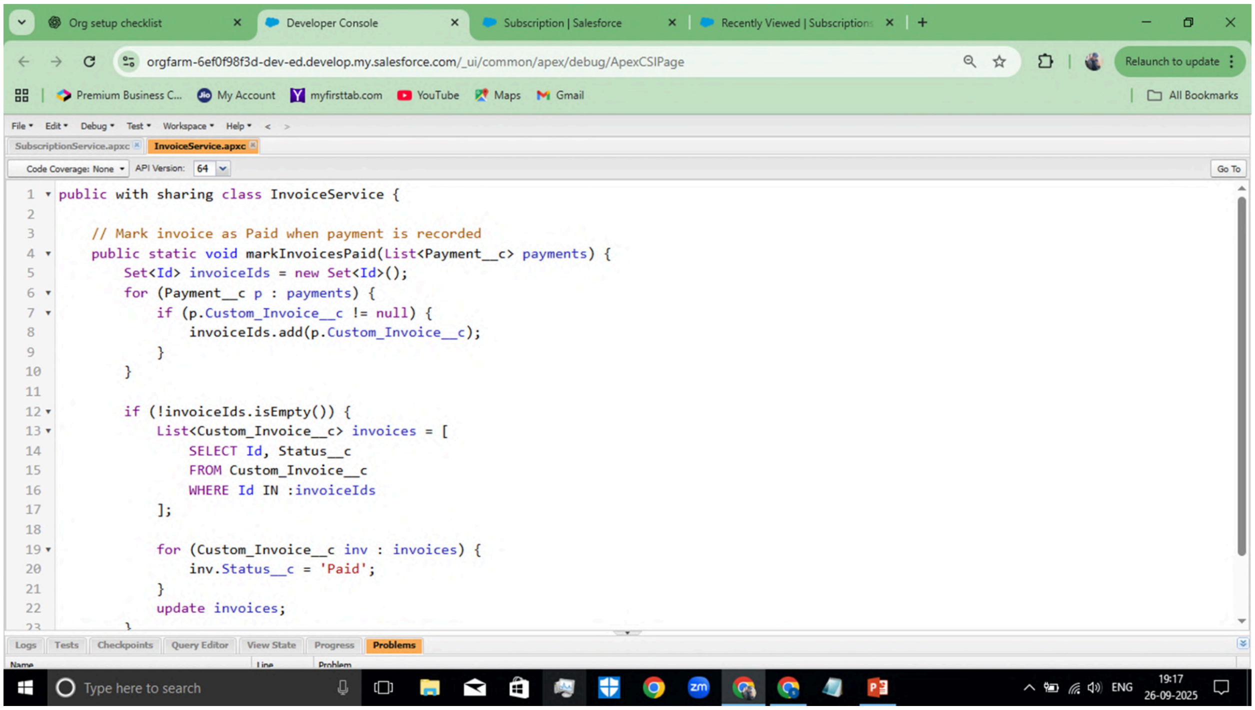
Goal : Implement custom business logic using Apex to automate invoice status updates upon payment.

- Open Developer Console or VS Code.

- Apex Test Class : Ensures code coverage and correctness for trigger and helper class

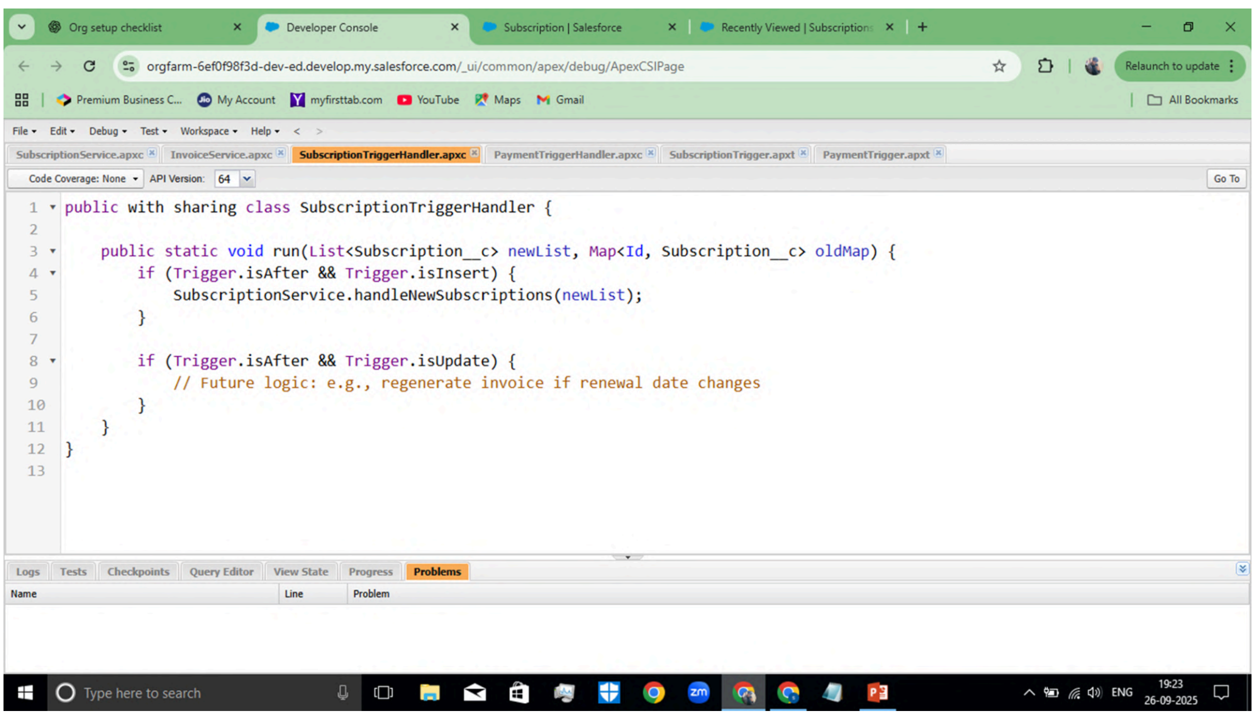
Create Apex Classes: SubscriptionService.cls, InvoiceService.cls.



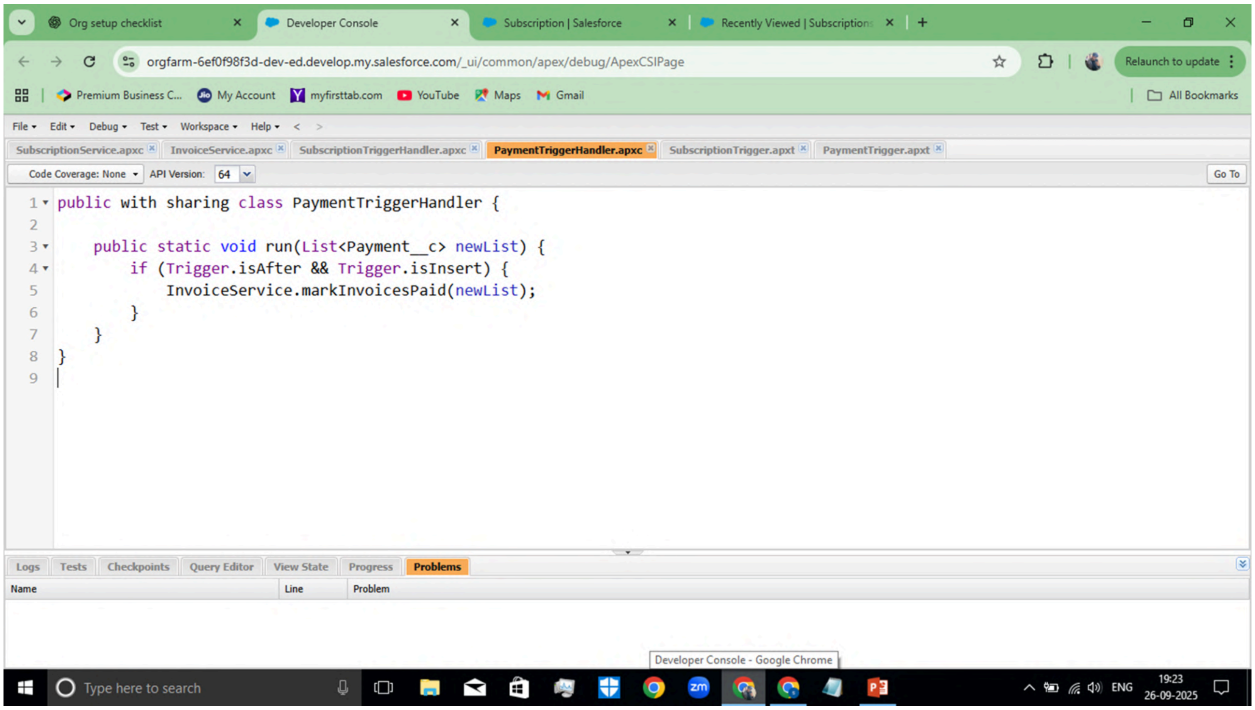


```
public with sharing class InvoiceService {

    // Mark invoice as Paid when payment is recorded
    public static void markInvoicesPaid(List<Payment__c> payments) {
        Set<Id> invoiceIds = new Set<Id>();
        for (Payment__c p : payments) {
            if (p.Custom_Invoice__c != null) {
                invoiceIds.add(p.Custom_Invoice__c);
            }
        }

        if (!invoiceIds.isEmpty()) {
            List<Custom_Invoice__c> invoices = [
                SELECT Id, Status__c
                FROM Custom_Invoice__c
                WHERE Id IN :invoiceIds
            ];

            for (Custom_Invoice__c inv : invoices) {
                inv.Status__c = 'Paid';
            }
            update invoices;
        }
```

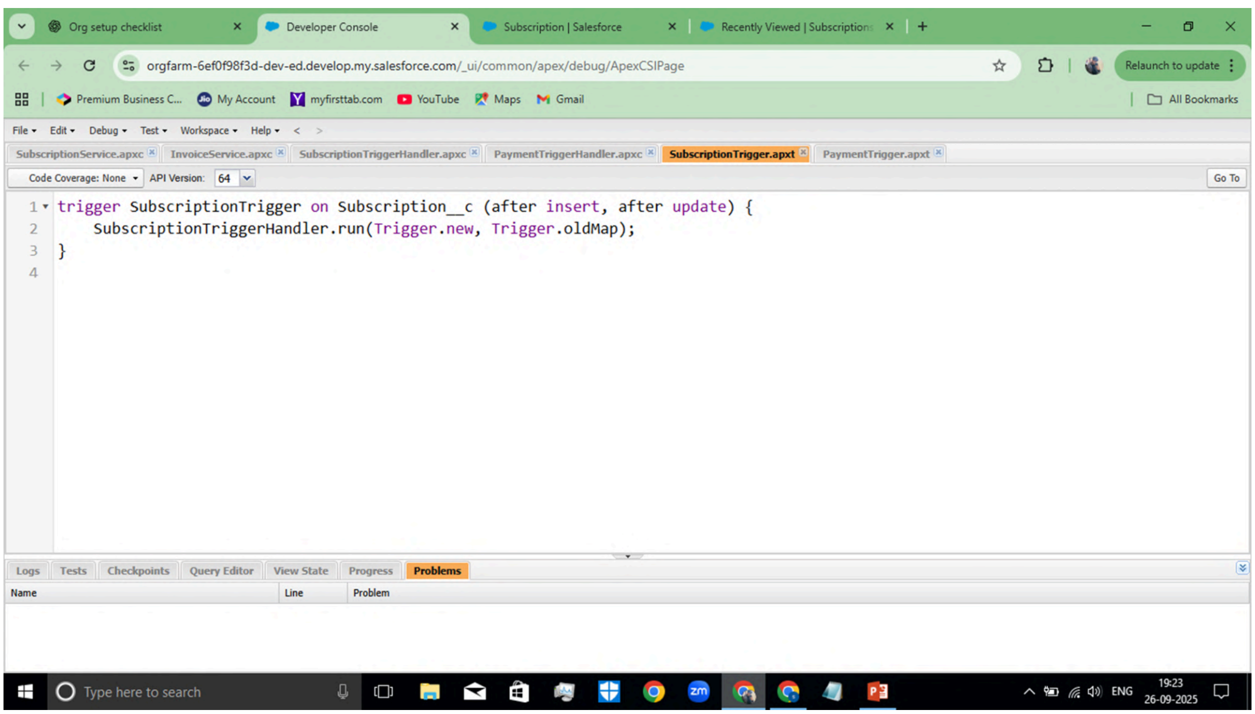
- Create Trigger Handlers: one trigger per object, delegate to handler class:



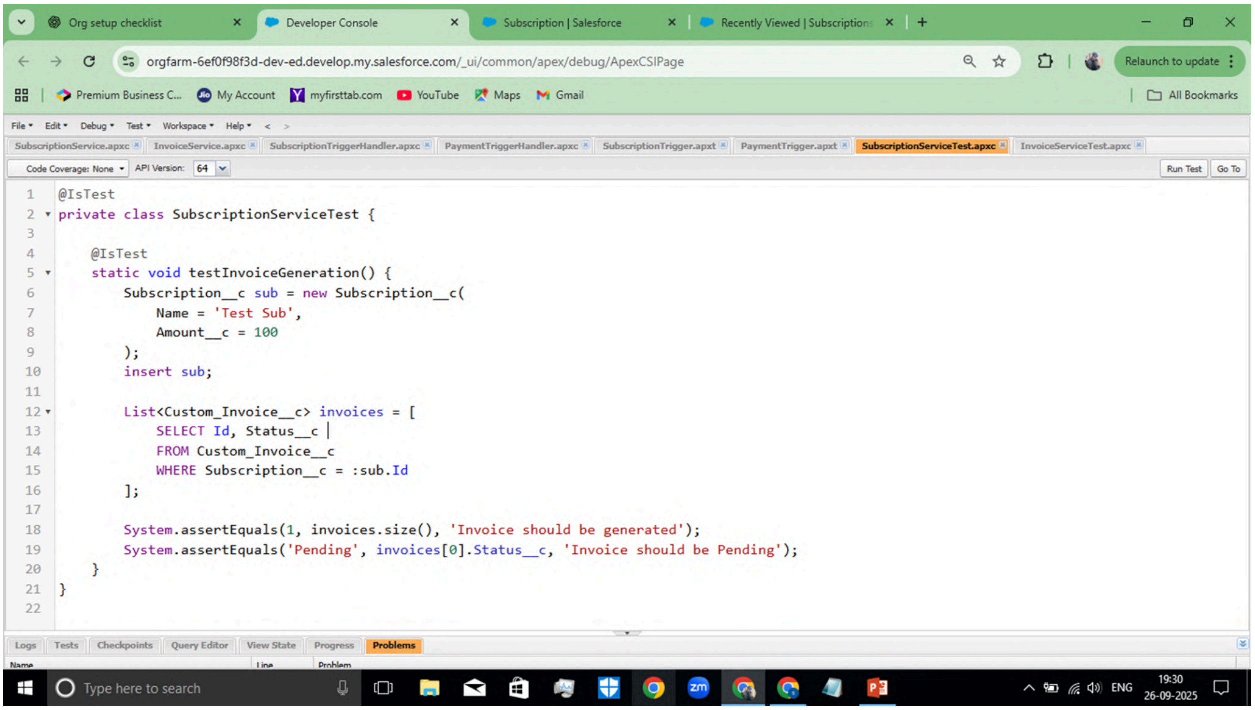
```
public with sharing class SubscriptionTriggerHandler {

    public static void run(List<Subscription__c> newList, Map<Id, Subscription__c> oldMap) {
        if (Trigger.isAfter && Trigger.isInsert) {
            SubscriptionService.handleNewSubscriptions(newList);
        }

        if (Trigger.isAfter && Trigger.isUpdate) {
            // Future logic: e.g., regenerate invoice if renewal date changes
        }
    }
}
```

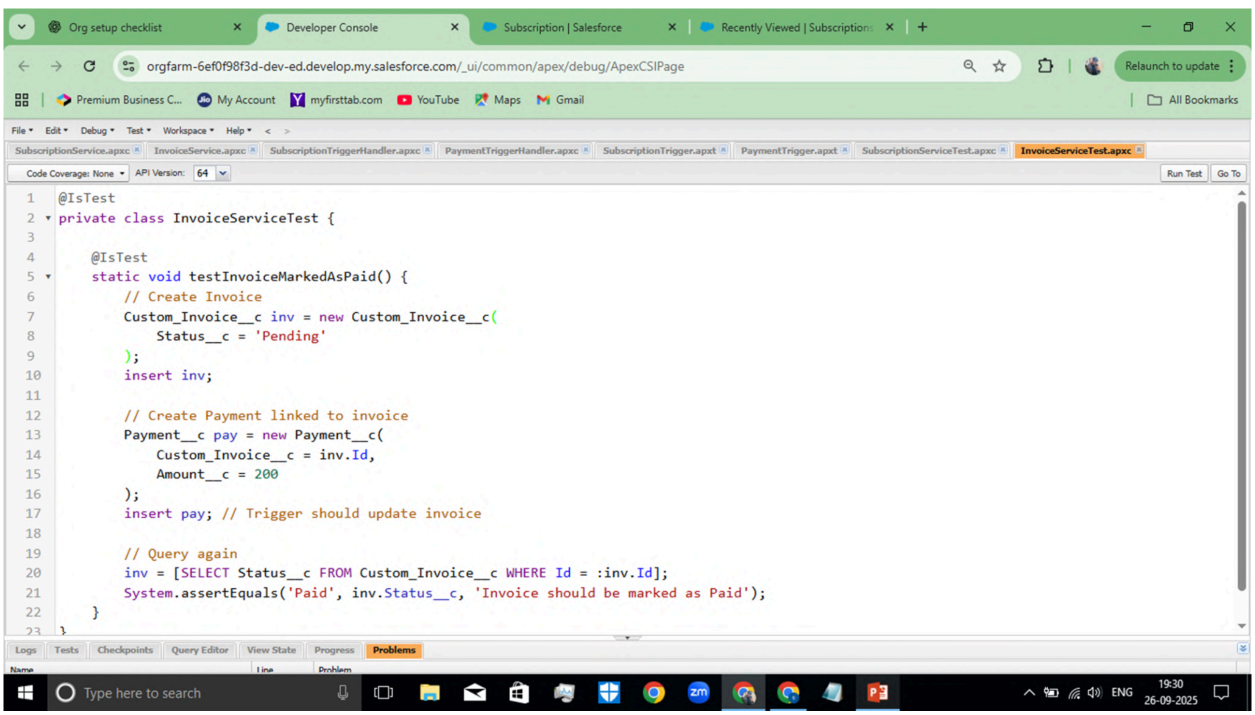


- Apex Trigger

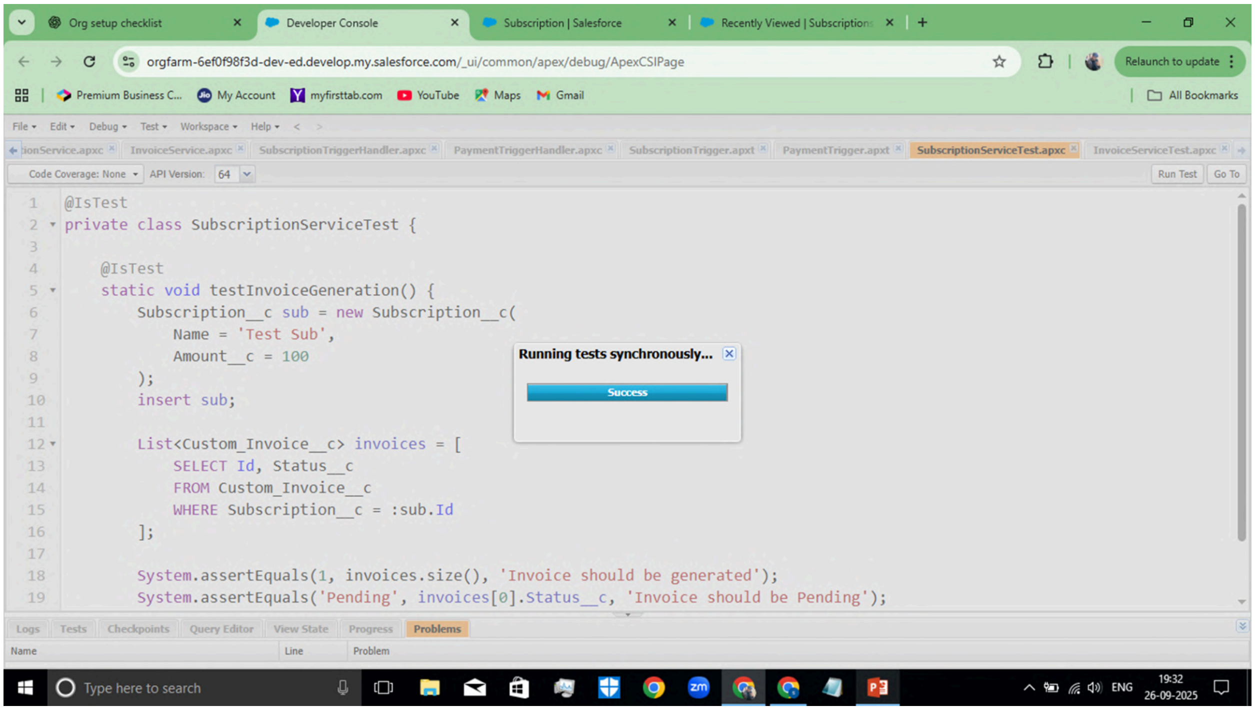


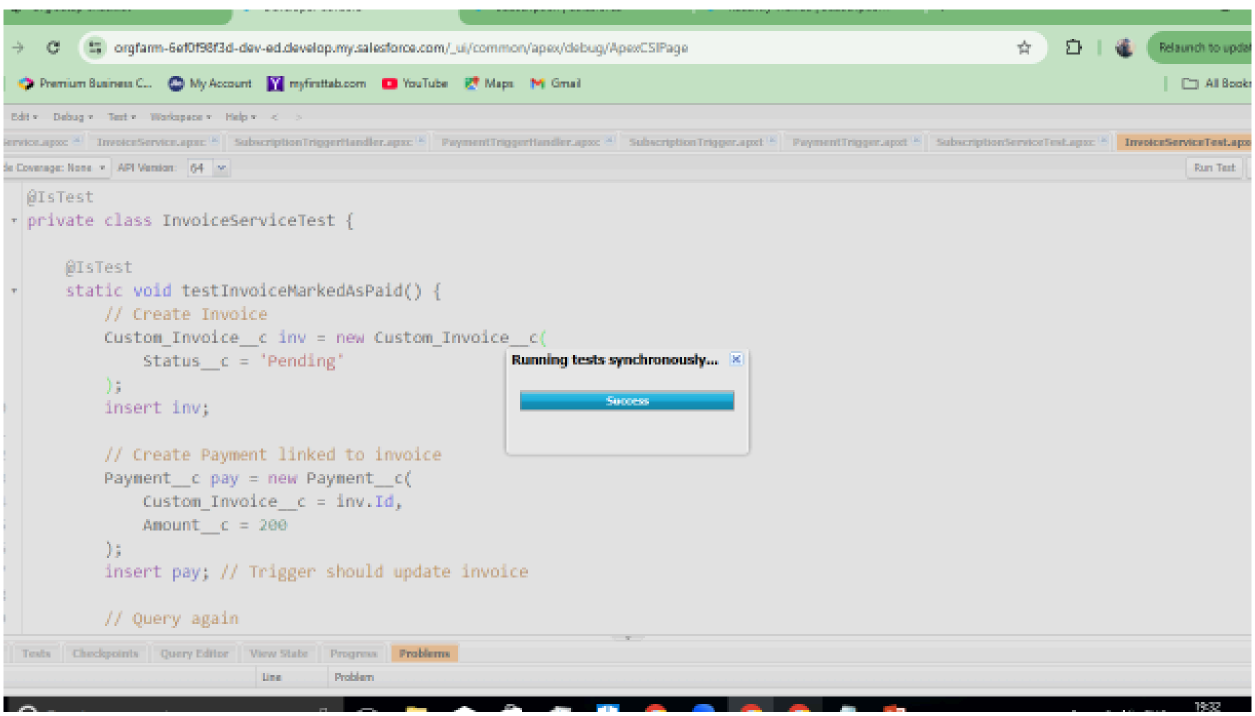
- Begin writing Unit Tests to cover your code.





- Test Case

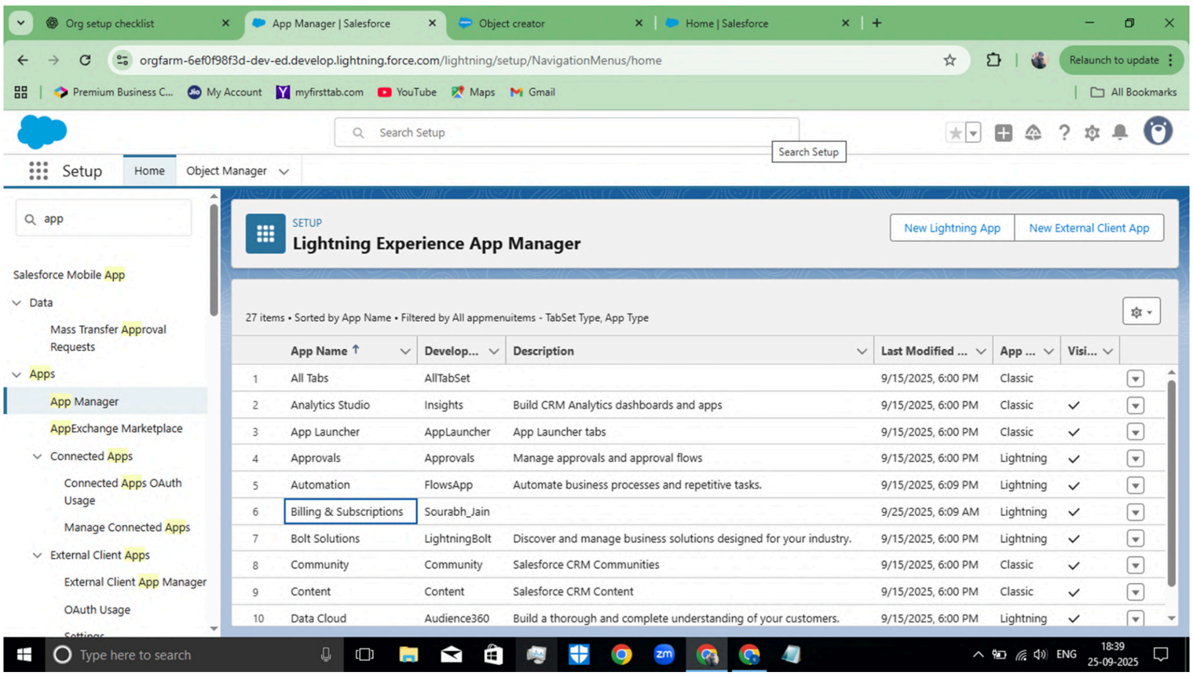

@IsTest
private class SubscriptionServiceTest {
@IsTest
static void testInvoiceGeneration() {
Subscription__c sub = new Subscription__c(
Name = 'Test Sub',
Amount__c = 100
);
insert sub;
List<Custom_Invoice__c> invoices = [
SELECT Id, Status__c
FROM Custom_Invoice__c
WHERE Subscription__c = :sub.Id
];
System.assertEquals(1, invoices.size(), 'Invoice should be generated');
System.assertEquals('Pending', invoices[0].Status__c, 'Invoice should be Pending');
Running tests synchronously...
Success

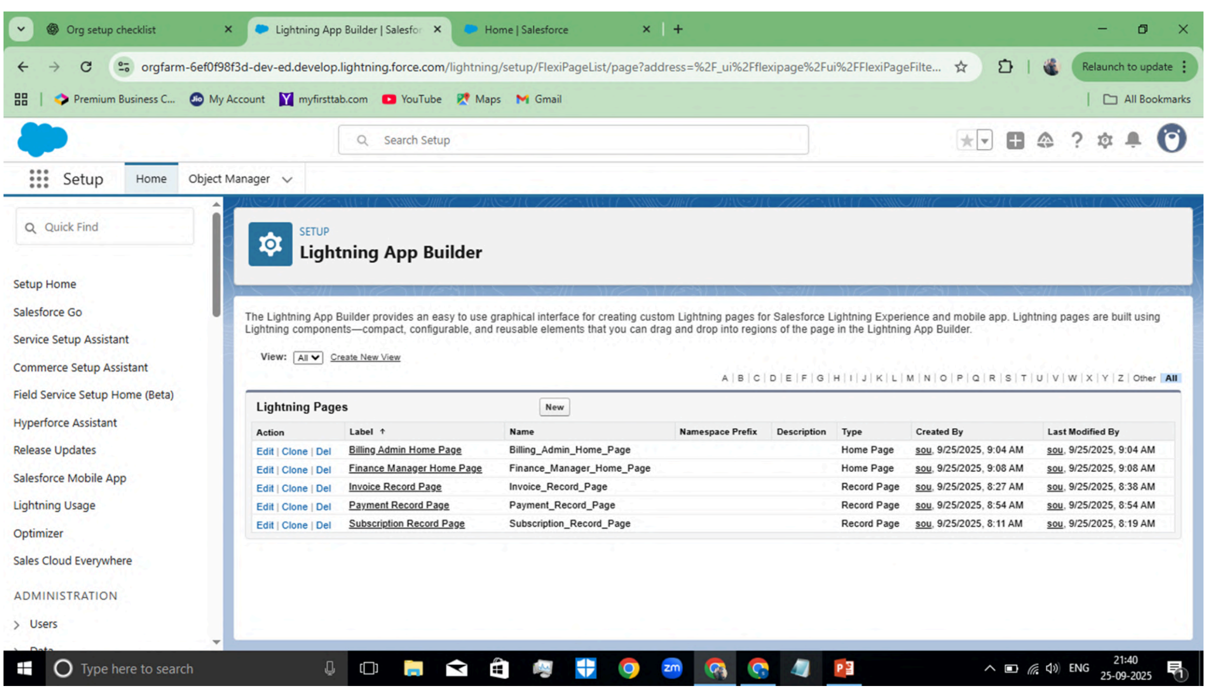

@IsTest
private class InvoiceServiceTest {
@IsTest
static void testInvoiceMarkedAsPaid() {
// Create Invoice
Custom_Invoice__c inv = new Custom_Invoice__c(
Status__c = 'Pending'
);
insert inv;
// Create Payment linked to invoice
Payment__c pay = new Payment__c(
Custom_Invoice__c = inv.Id,
Amount__c = 200
);
insert pay; // Trigger should update invoice
// Query again
Running tests synchronously...
Success

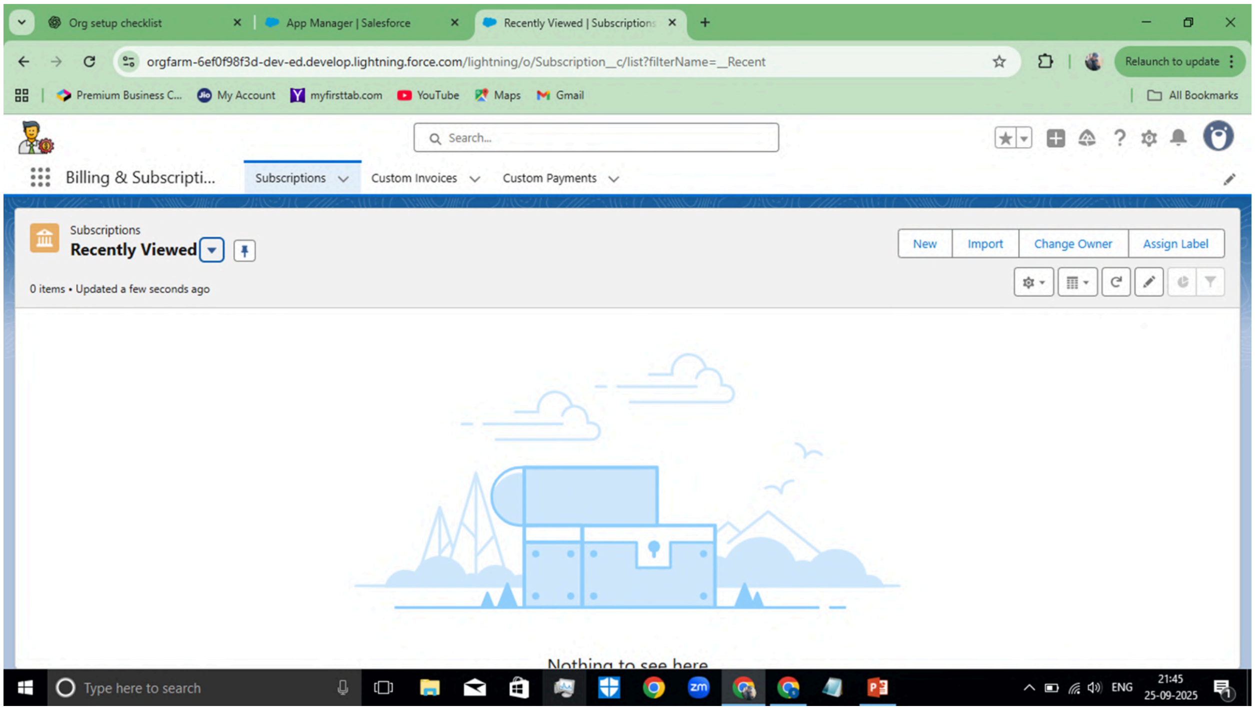
Phase 6 – User Interface Development

Goal : Develop Lightning Web Components to improve visibility and streamline subscription and billing management.

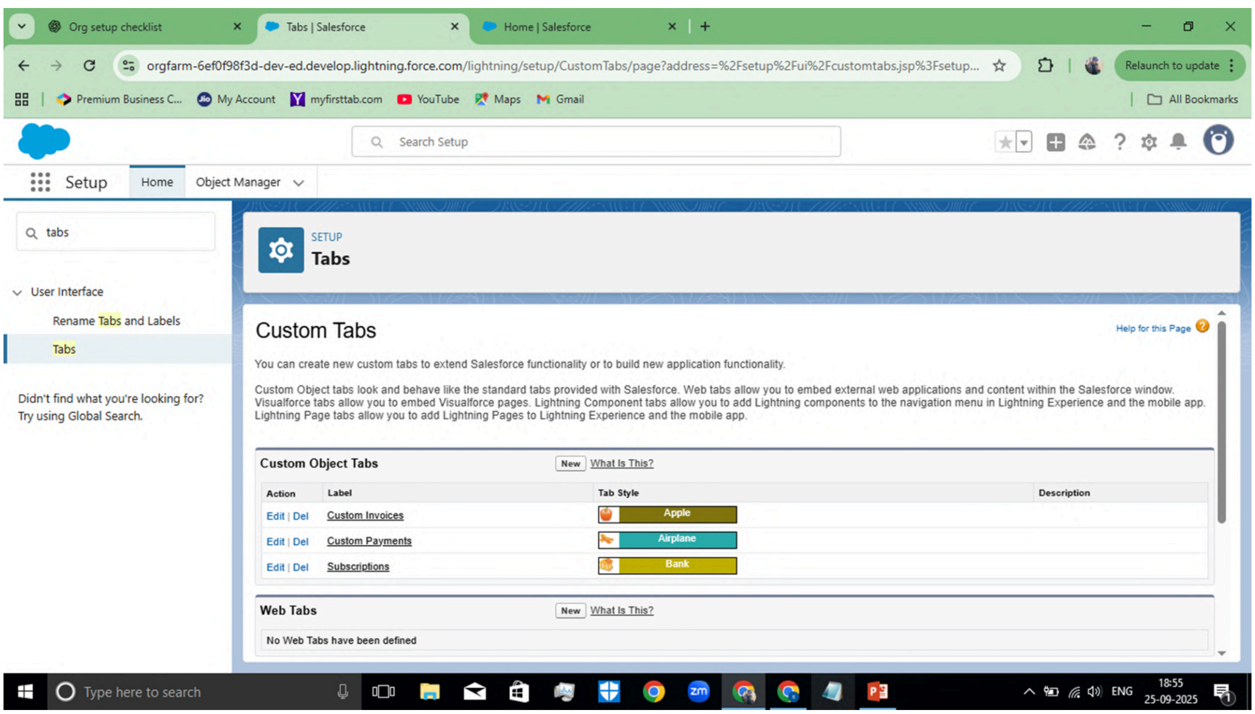
App Manager → New Lightning App (“Billing & Subscriptions”).



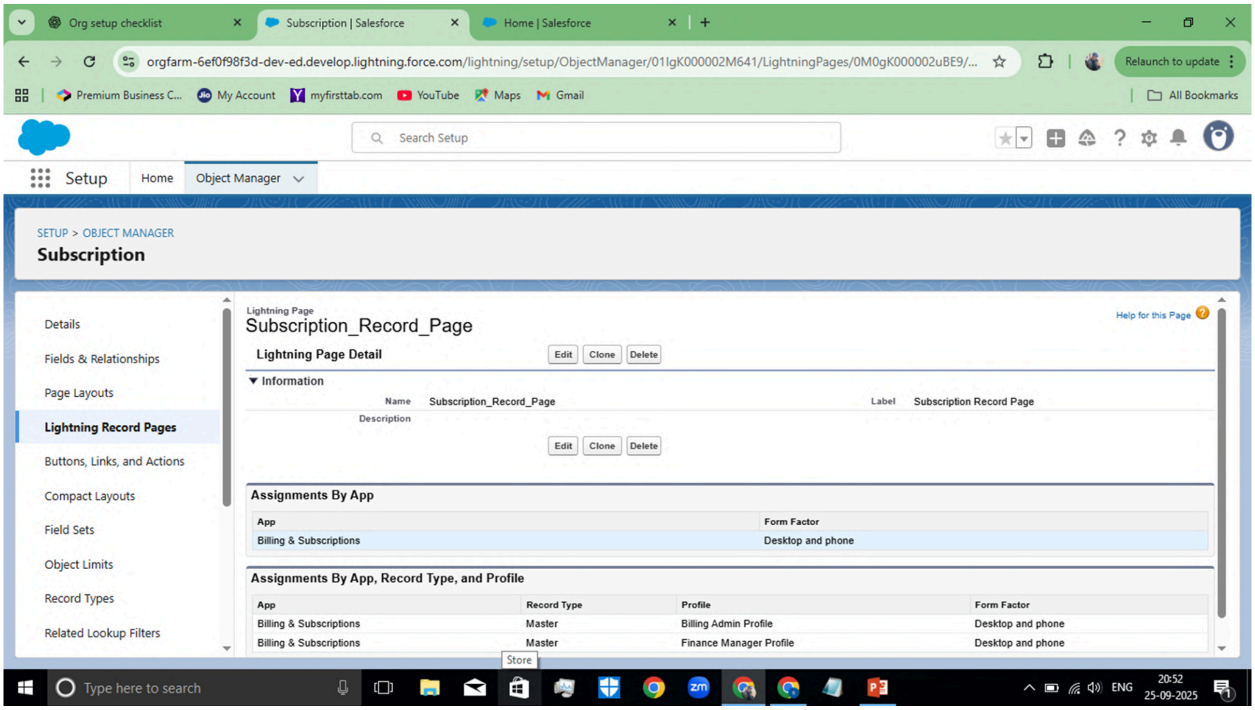


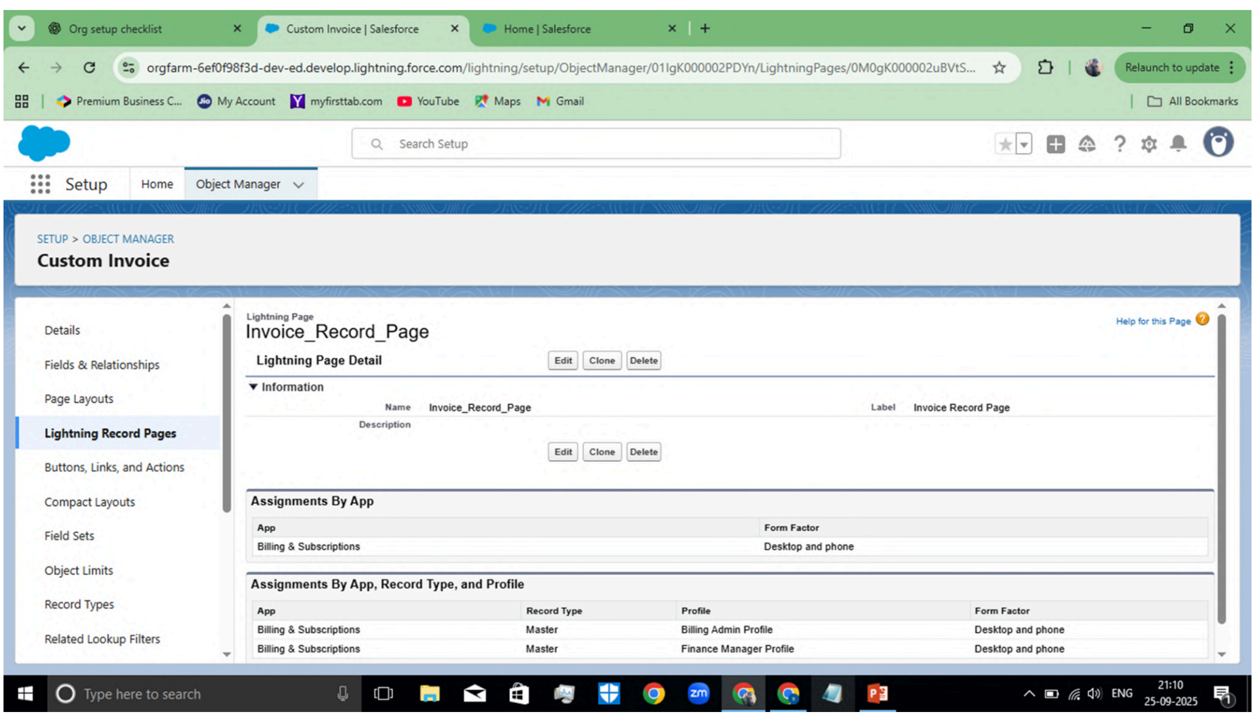


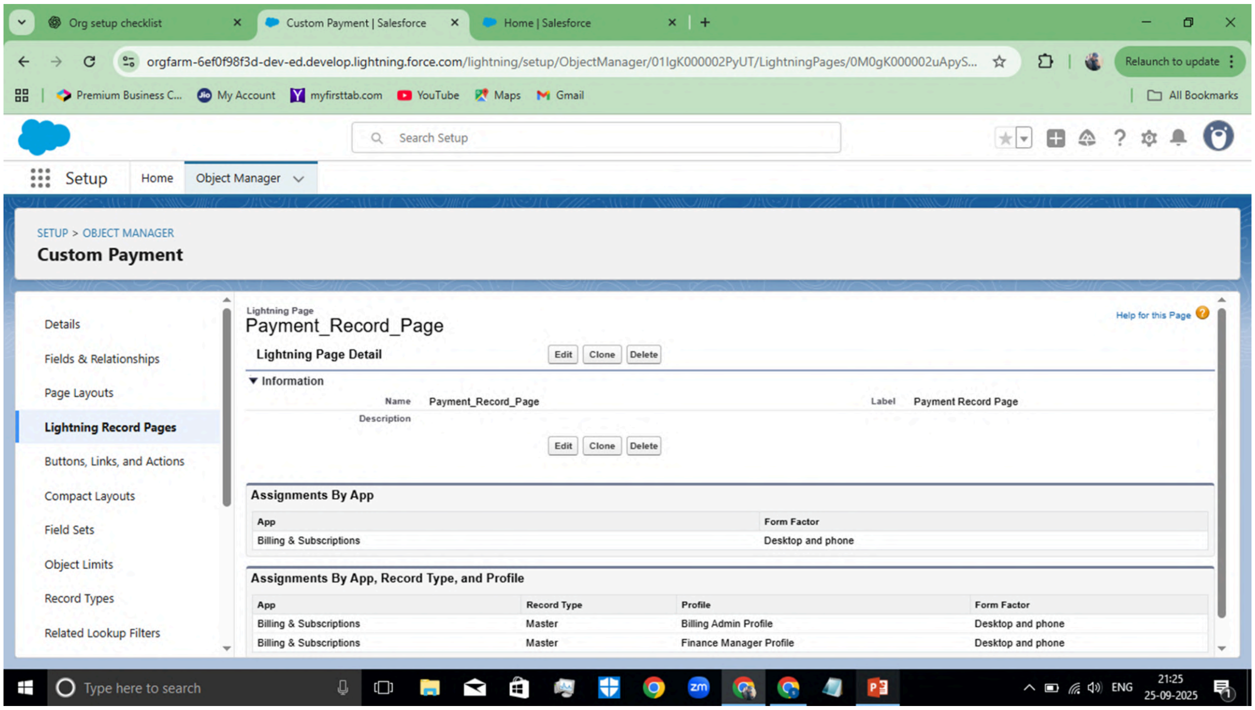
- Add your Custom Tabs (Subscription, Invoice, Payment, Plan) to the app navigation.



- Build Lightning Record Pages for each custom object in Lightning App Builder.



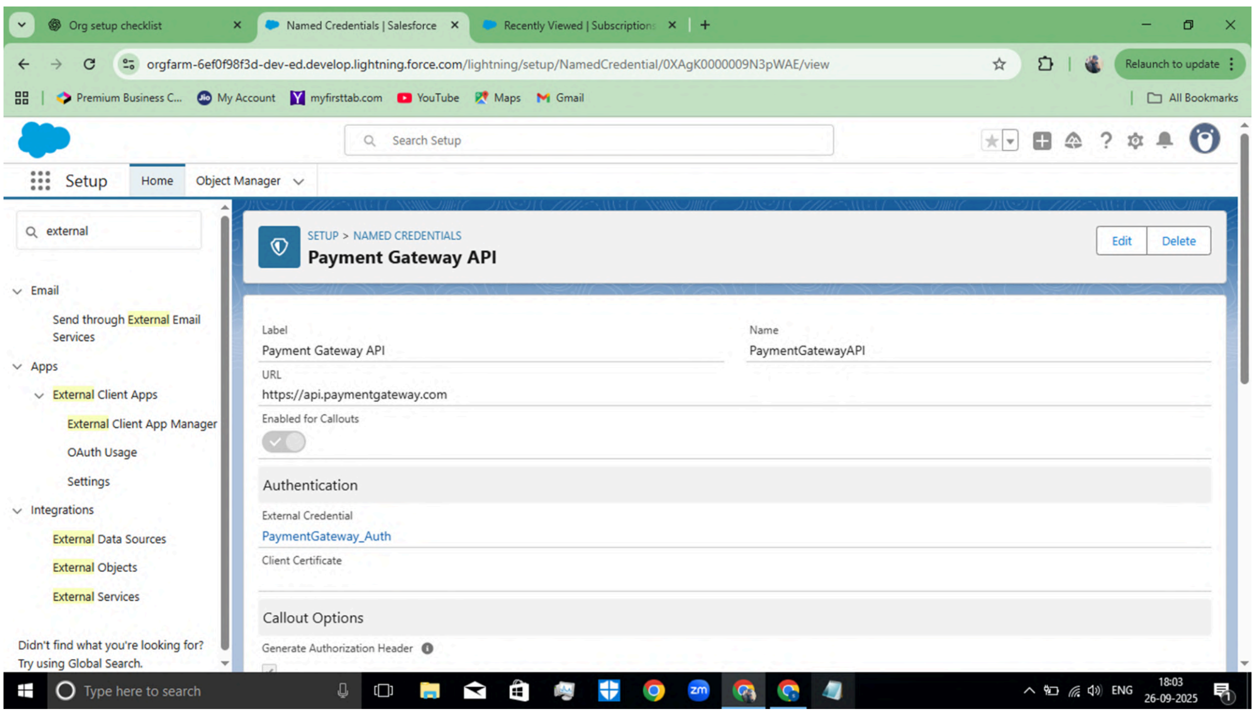


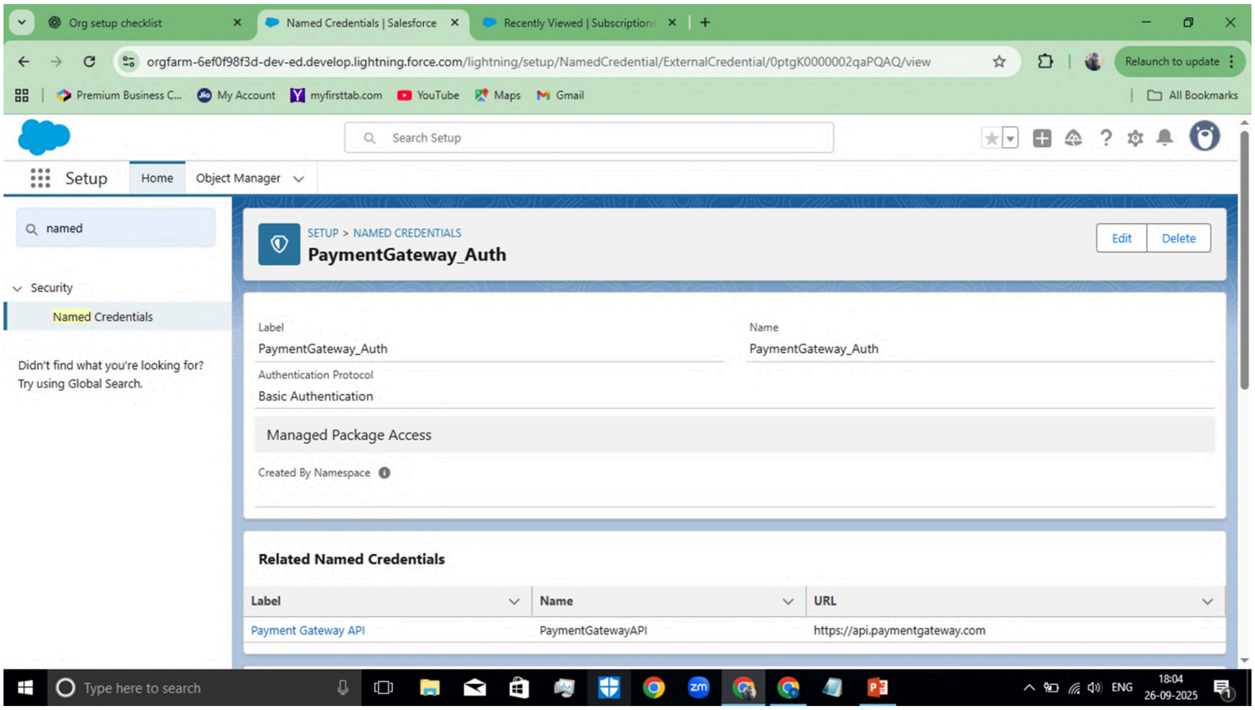

Org setup checklist
Custom Payment | Salesforce
Home | Salesforce
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgK000002PyUT/LightningPages/0M0gK000002uApyS...
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Custom Payment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Lightning Page
Payment_Record_Page
Help for this Page
Lightning Page Detail
Edit
Clone
Delete
Information
Name
Payment_Record_Page
Label
Payment Record Page
Description
Edit
Clone
Delete
Assignments By App
App
Form Factor
Billing & Subscriptions
Desktop and phone
Assignments By App, Record Type, and Profile
App
Record Type
Profile
Form Factor
Billing & Subscriptions
Master
Billing Admin Profile
Desktop and phone
Billing & Subscriptions
Master
Finance Manager Profile
Desktop and phone
Type here to search
ENG
21:25
25-09-2025

Phase 7 – Integration & External Access

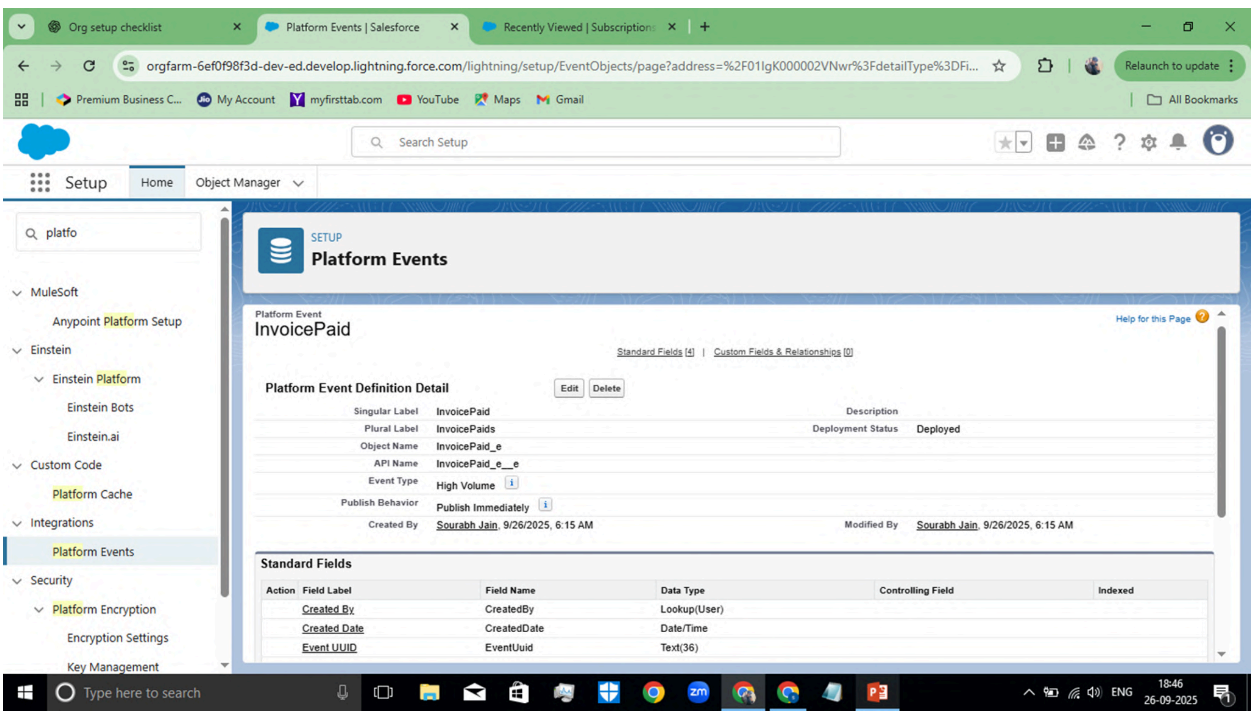
Goal : Establish secure, scalable integration with external payment gateways and accounting systems.

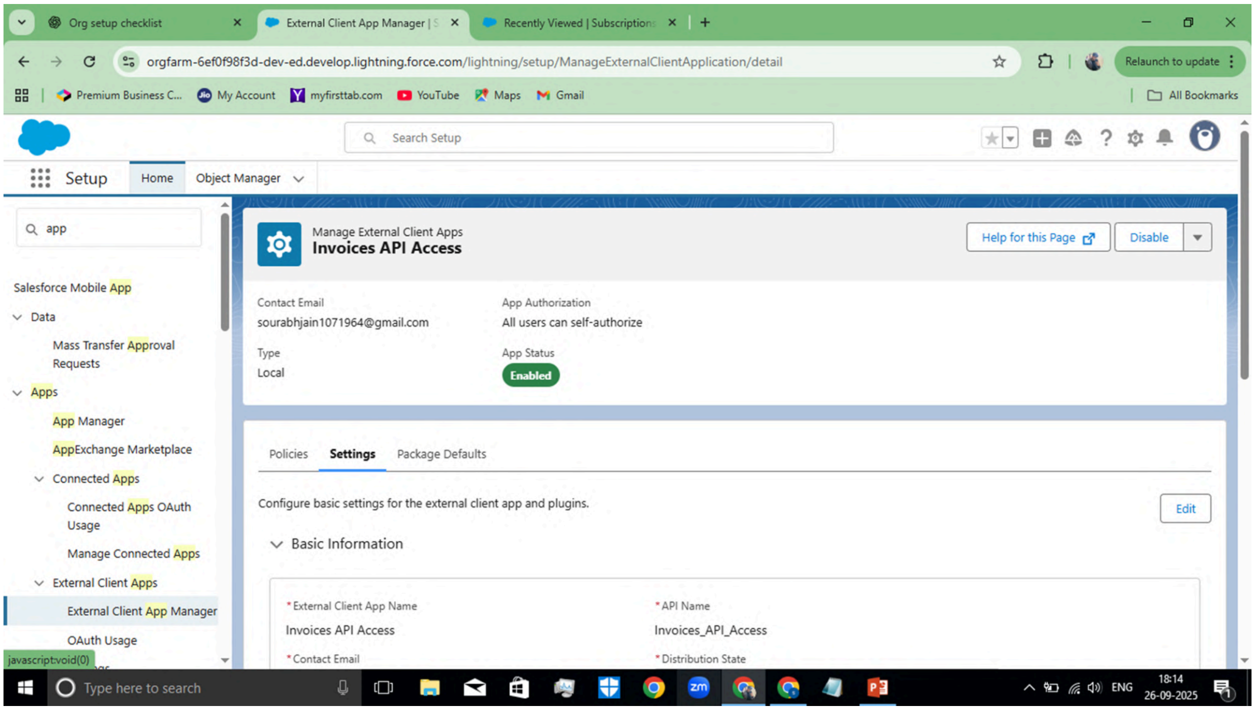
- Create Named Credentials for any external API (e.g., payment gateway)



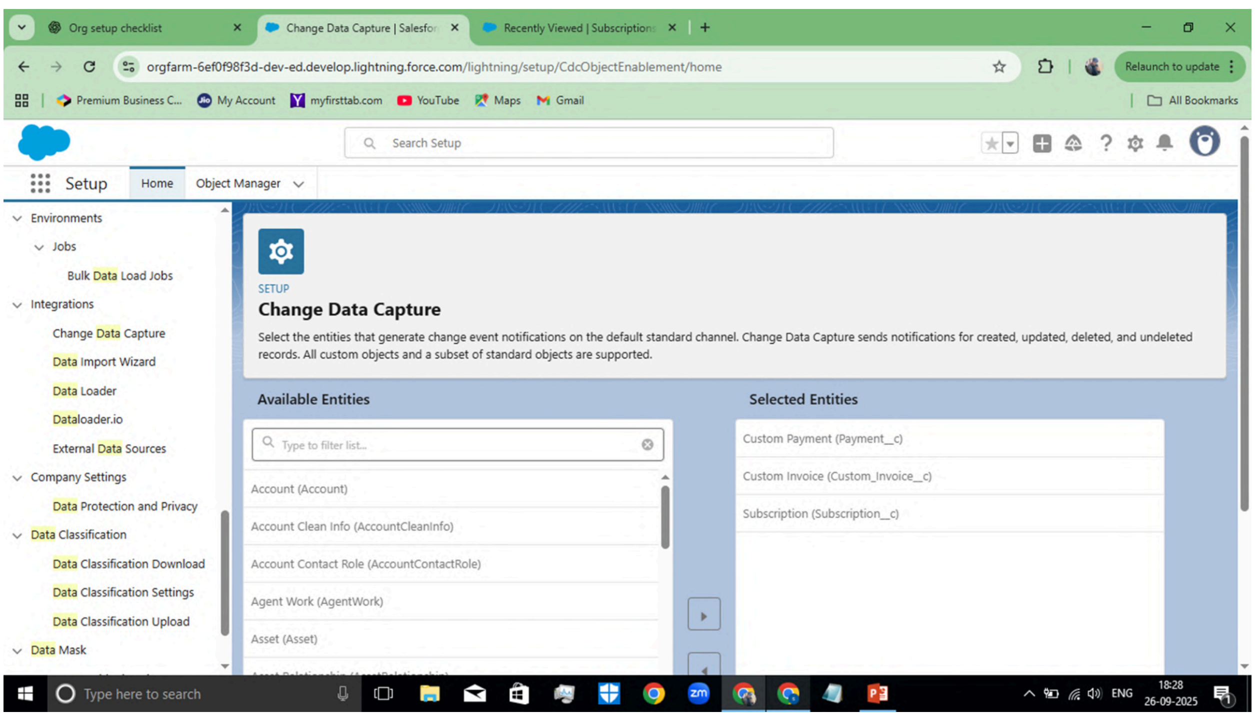


- Configure Platform Events (e.g., InvoicePaid__e) to publish events externally

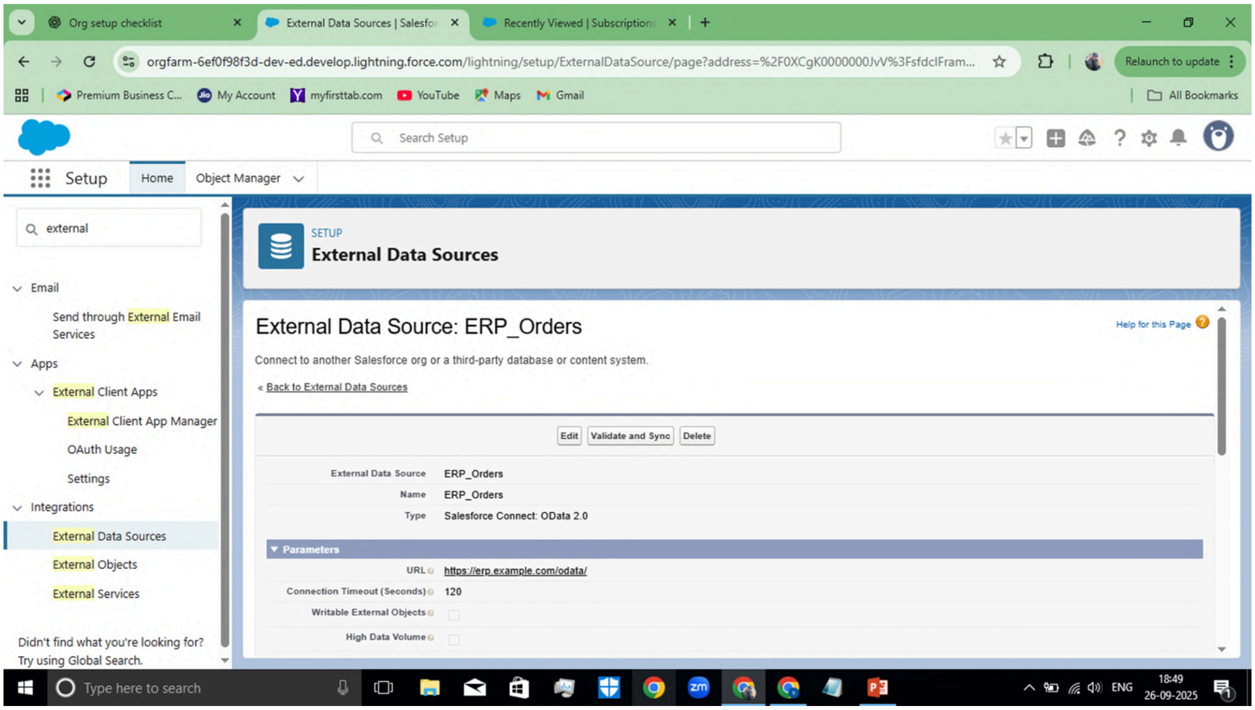


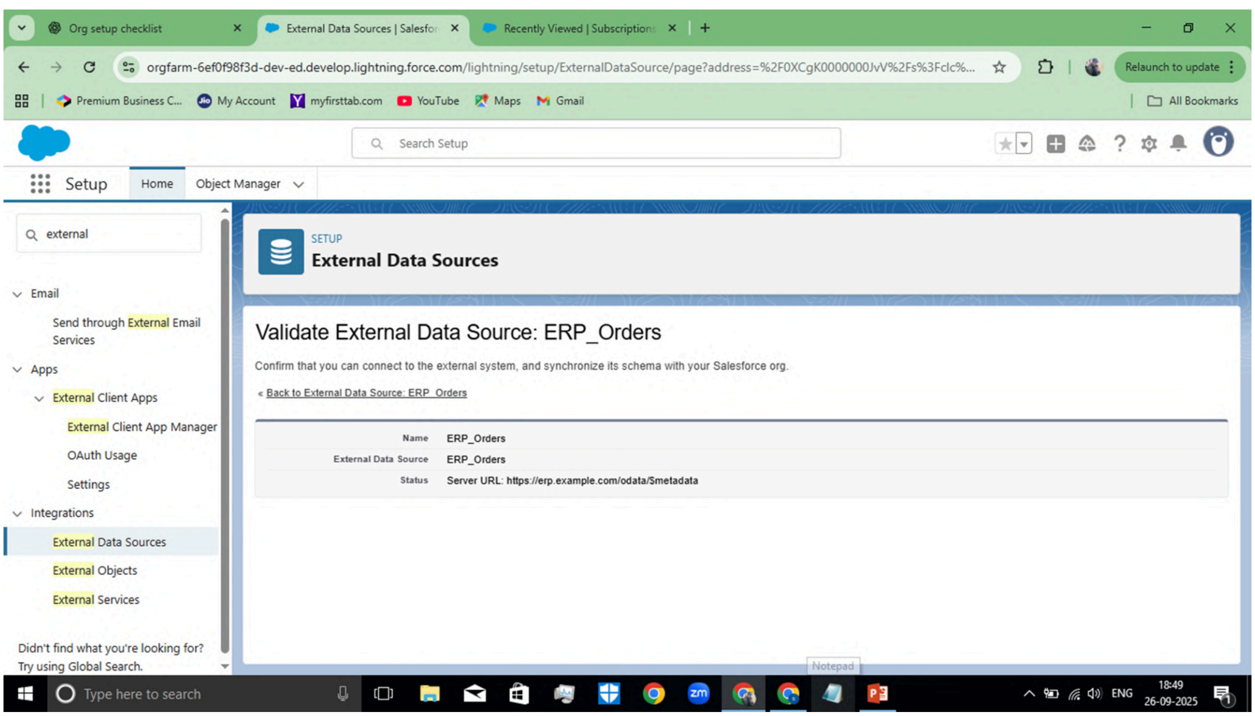


- Enable Change Data Capture for Subscription/Invoice if you want real-time streaming



- Set up Salesforce Connect if you want to show external ERP data without storing it

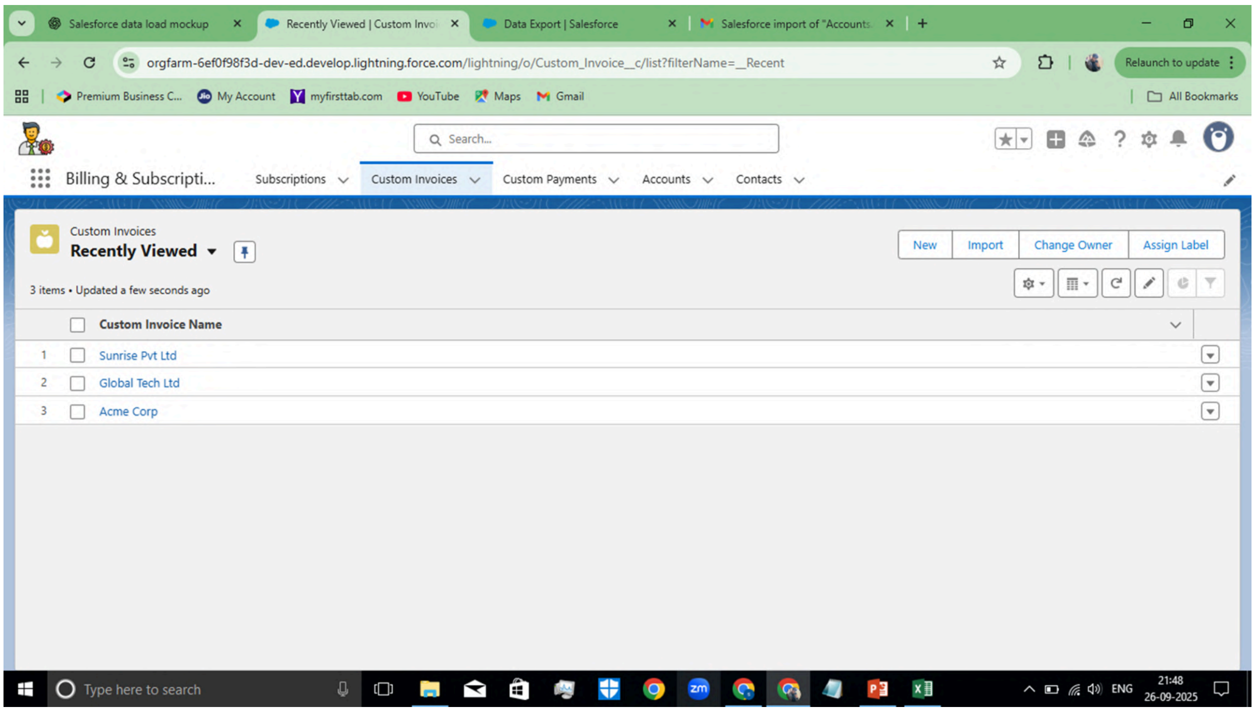


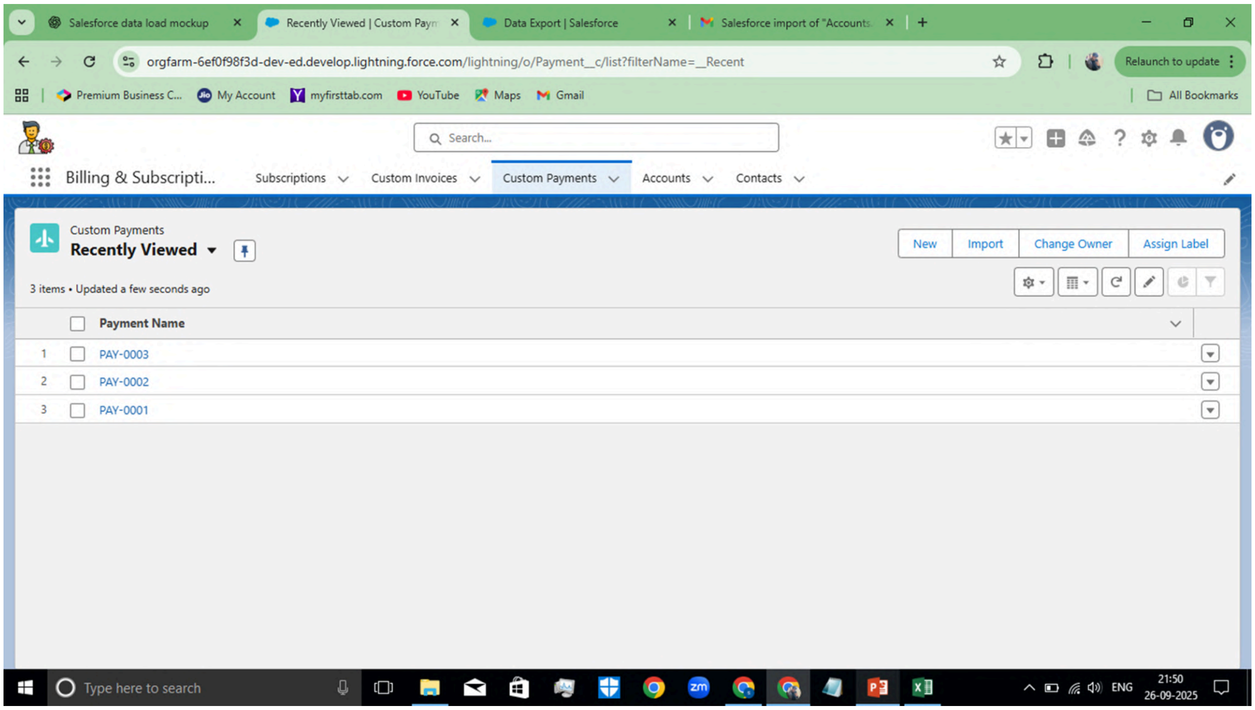


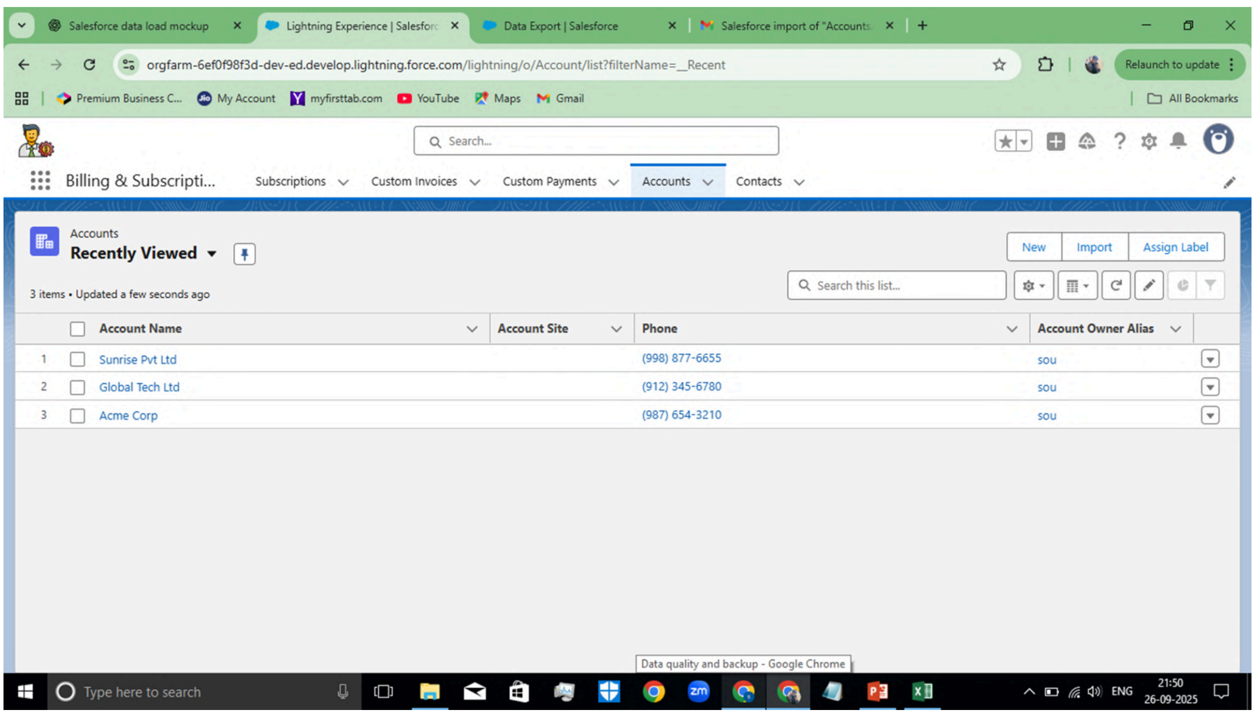
Phase 8 – Data Management & Deployment

Goal : Establish procedures for migrating data, managing duplicates, and deploying code.

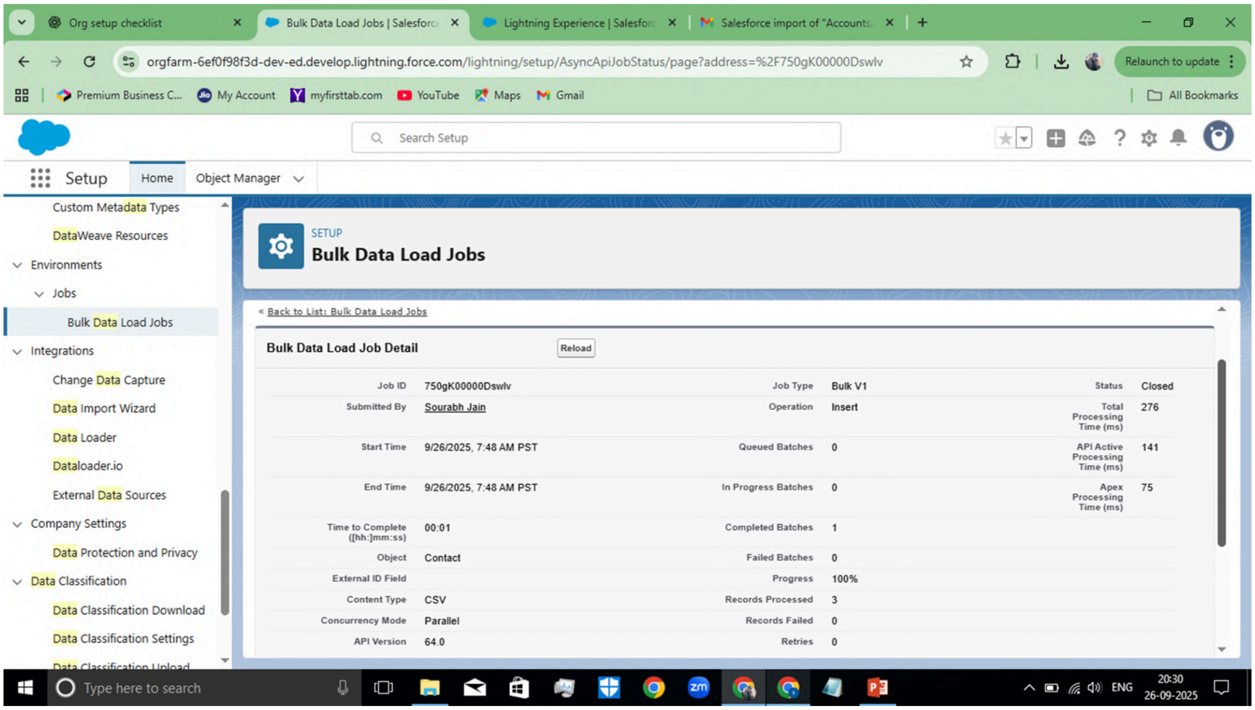
- Use Data Import Wizard for small loads (Accounts, Subscriptions).

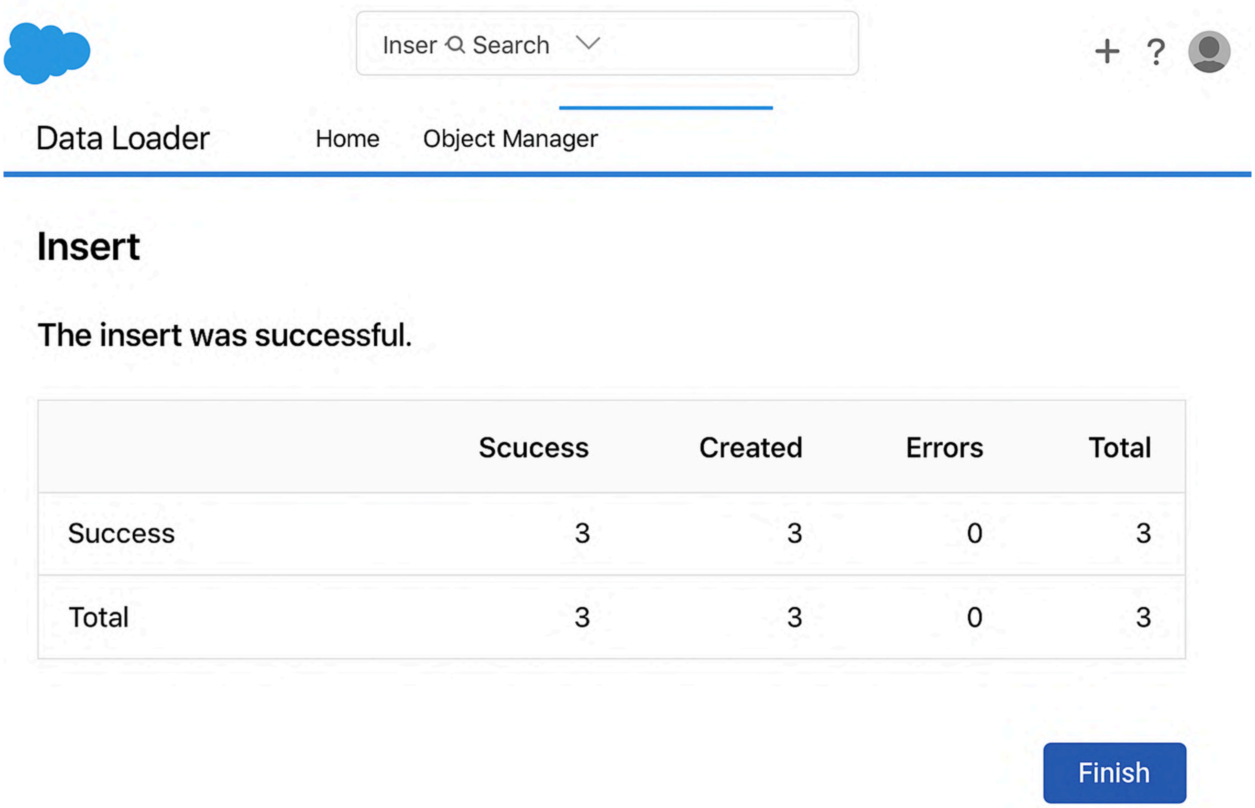



Salesforce data load mockup
Recently Viewed | Custom Paym
Data Export | Salesforce
Salesforce import of "Accounts
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/o/Payment__c/list?filterName=__Recent
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search...
Billing & Subscripti...
Subscriptions
Custom Invoices
Custom Payments
Accounts
Contacts
Custom Payments
Recently Viewed
New
Import
Change Owner
Assign Label
3 items • Updated a few seconds ago
Payment Name
1 PAY-0003
2 PAY-0002
3 PAY-0001
Type here to search
ENG
21:50
26-09-2025

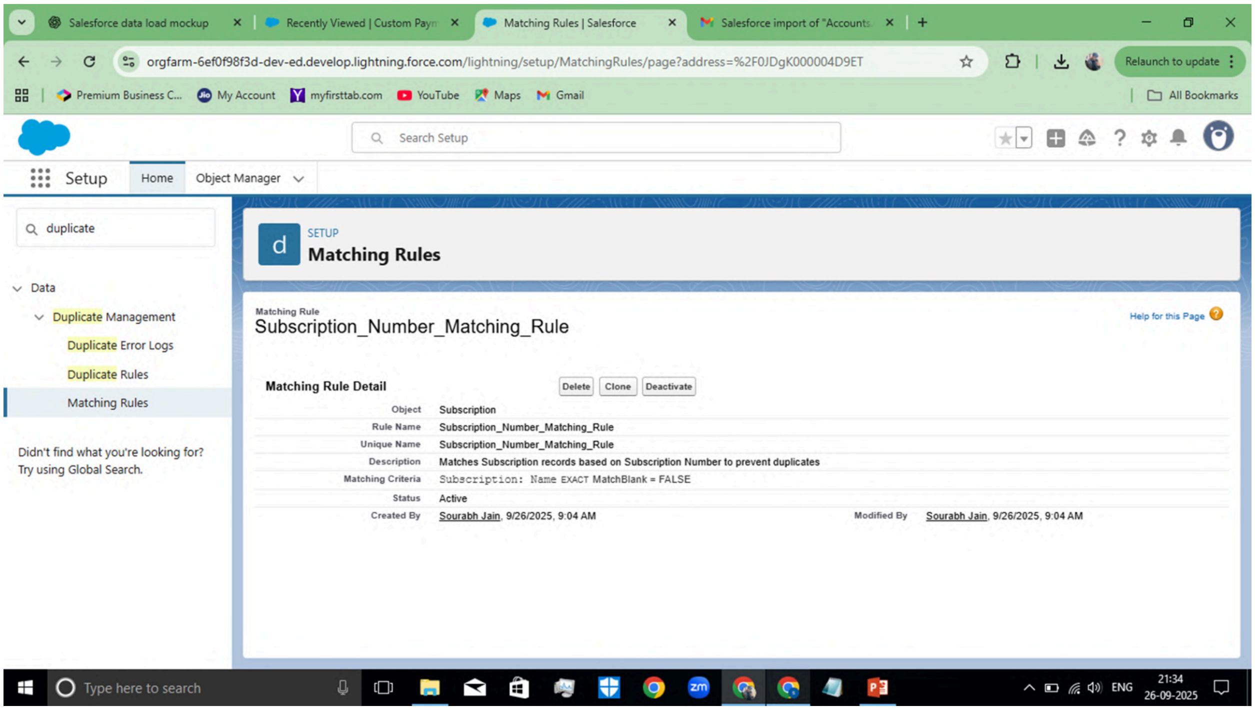

Salesforce data load mockup
Lightning Experience | Salesforc
Data Export | Salesforce
Salesforce import of "Accounts
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/o/Account/list?filterName=__Recent
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search...
Billing & Subscripti...
Subscriptions
Custom Invoices
Custom Payments
Accounts
Contacts
Accounts
Recently Viewed
New
Import
Assign Label
Search this list...
3 items • Updated a few seconds ago
Account Name
Account Site
Phone
Account Owner Alias
1 Sunrise Pvt Ltd (998) 877-6655 sou
2 Global Tech Ltd (912) 345-6780 sou
3 Acme Corp (987) 654-3210 sou
Data quality and backup - Google Chrome
Type here to search
ENG
21:50
26-09-2025

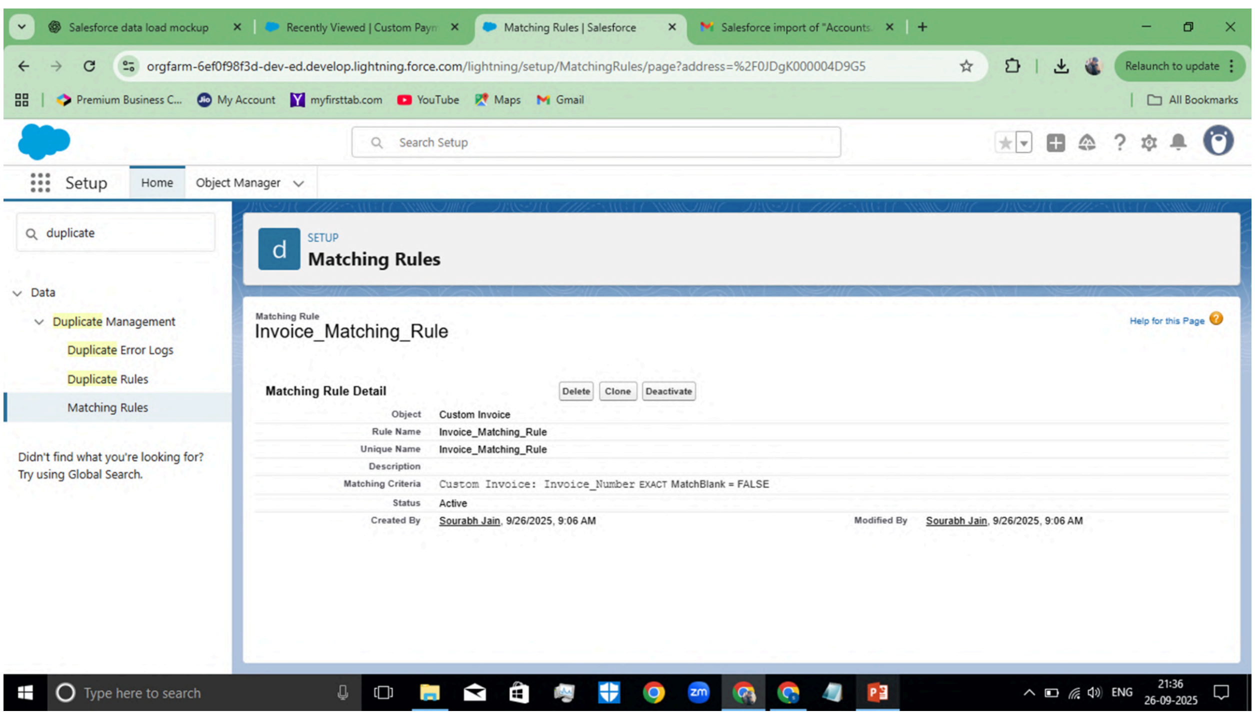
- Use Data Loader for bulk loads (Invoices, Payments).

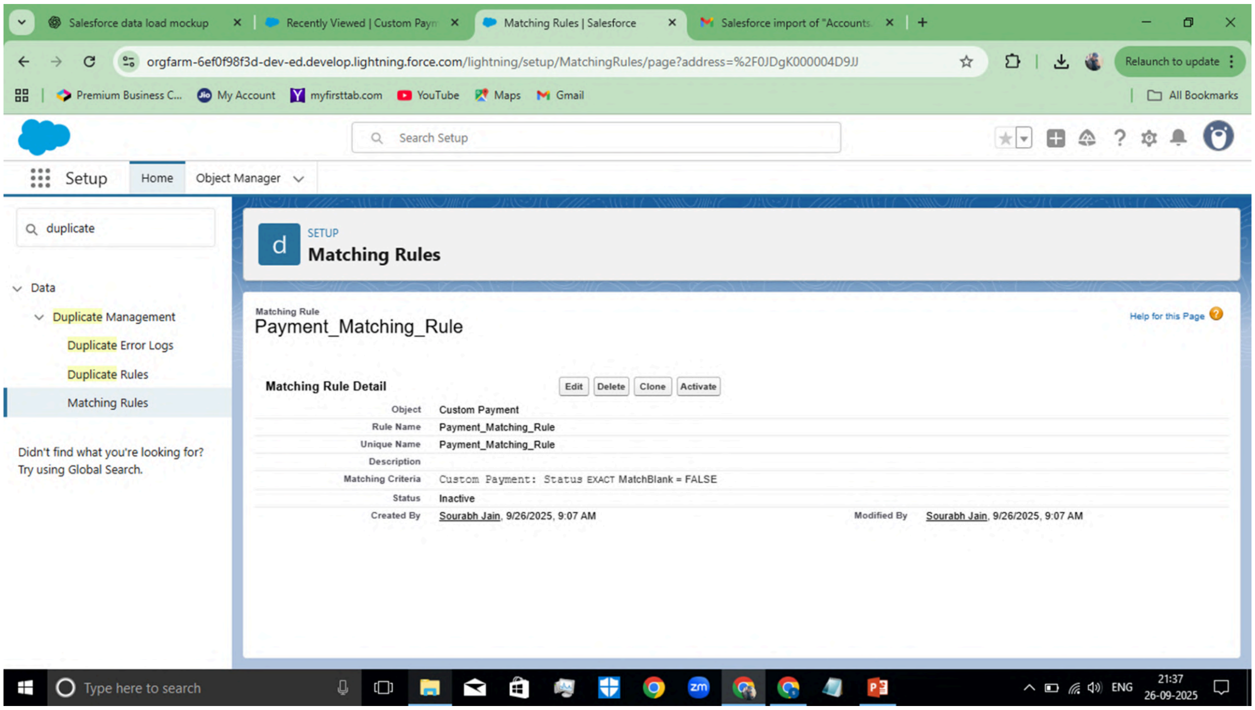




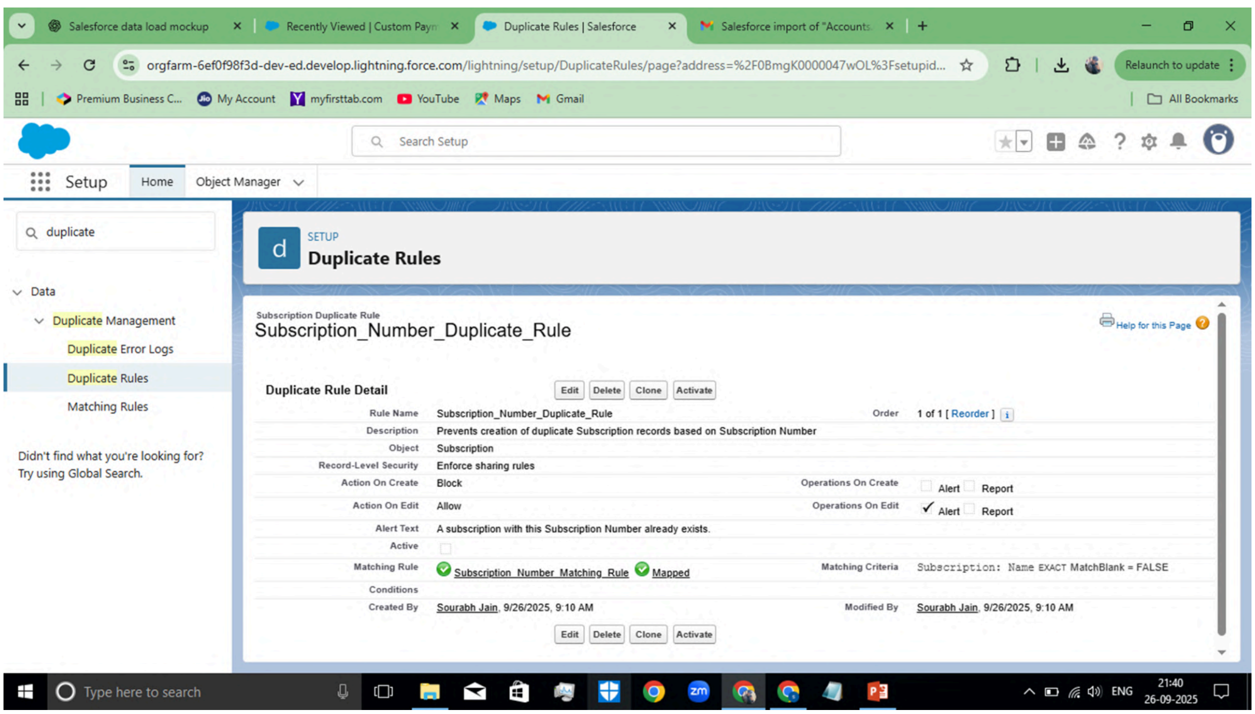
- Configure Matching Rules

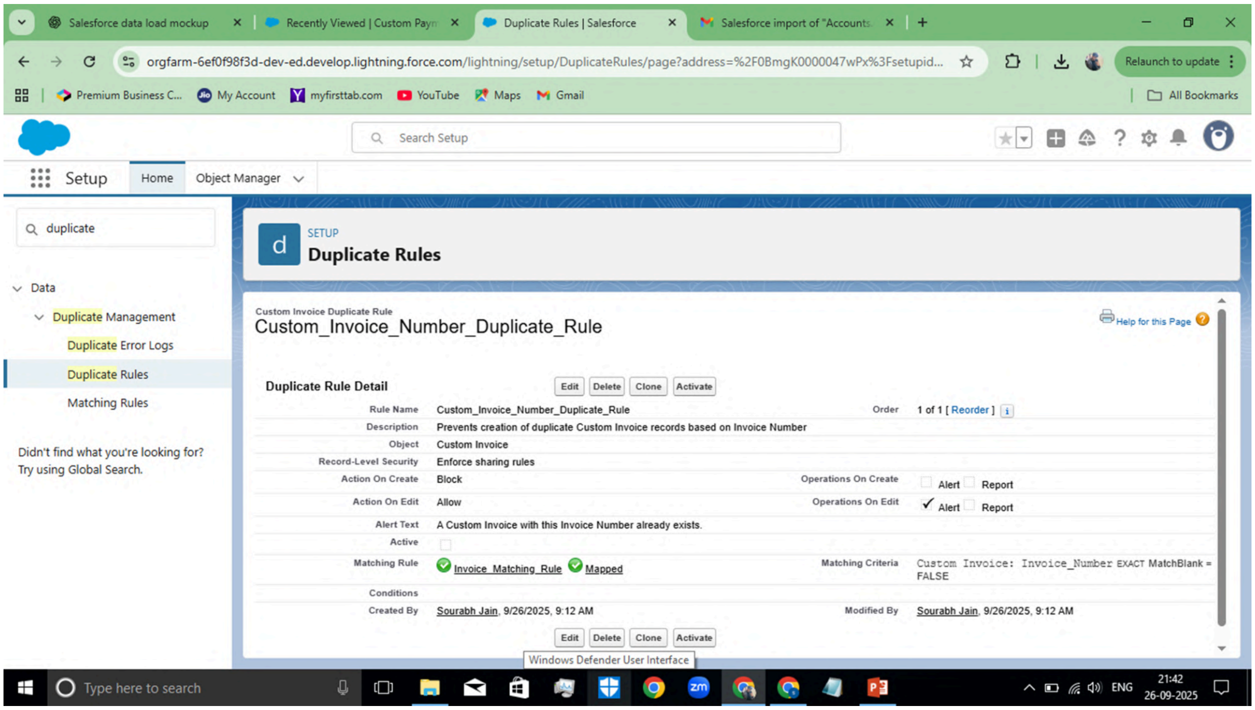


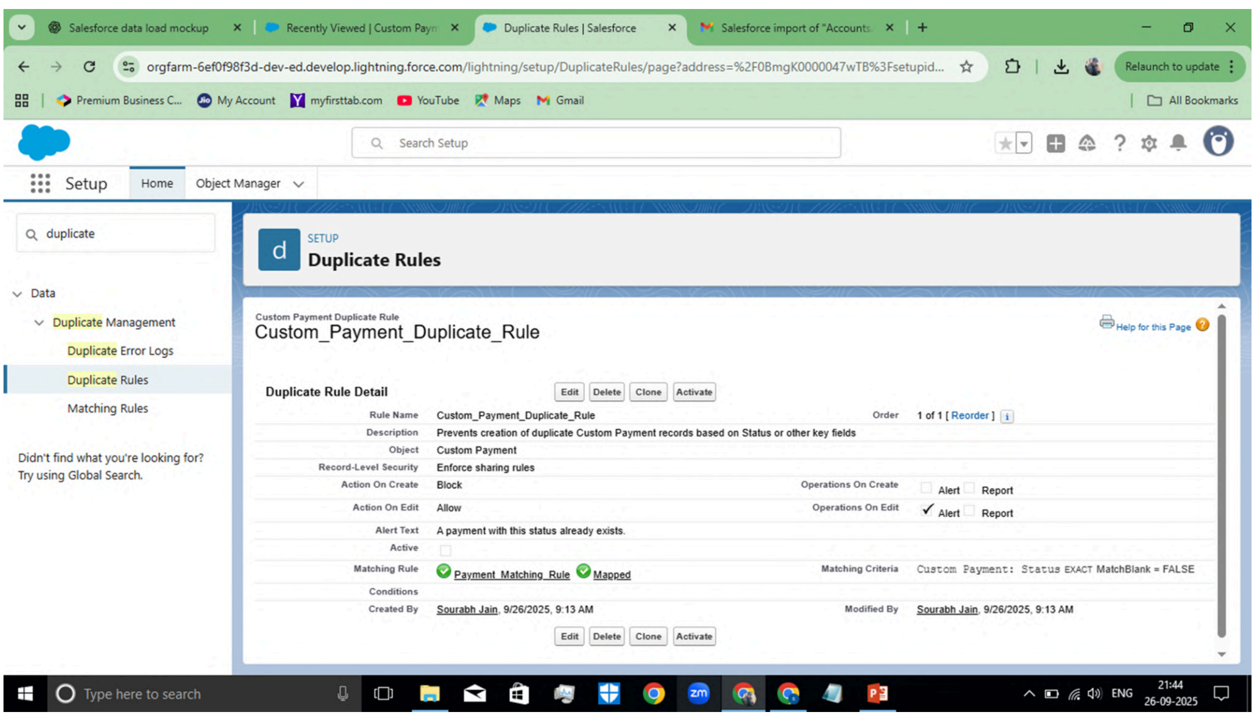




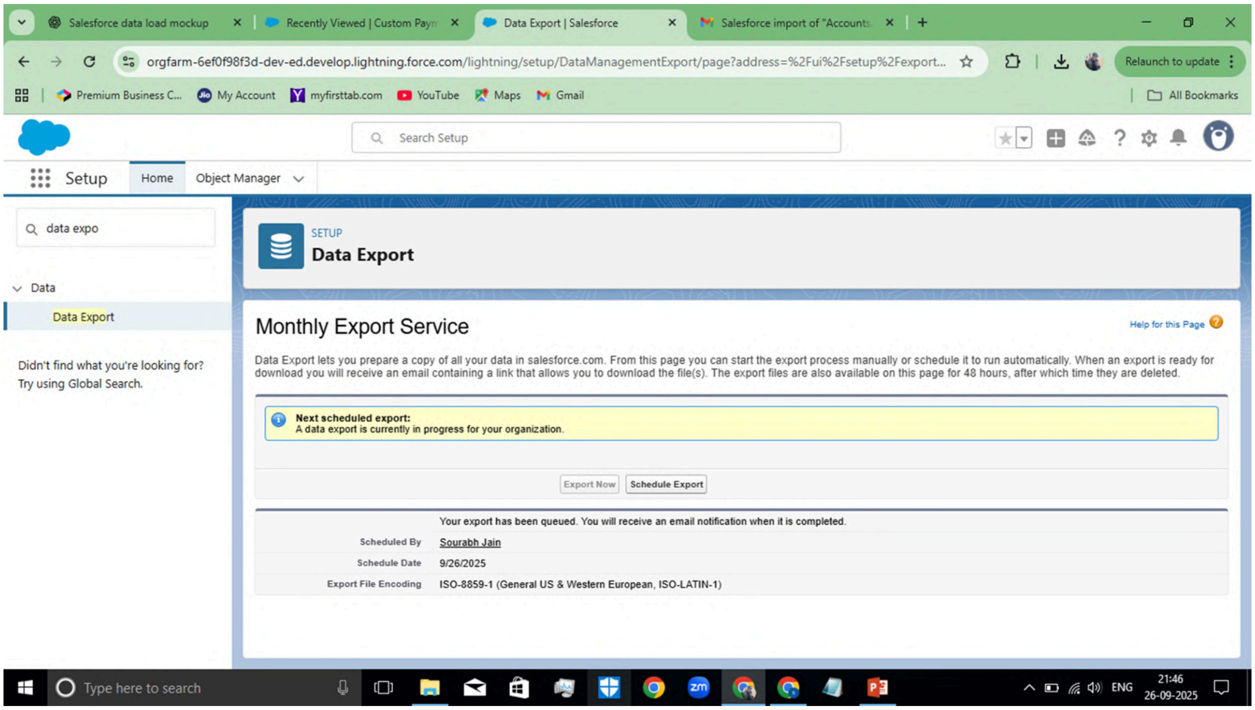
- Duplicate Rules to avoid duplicates.



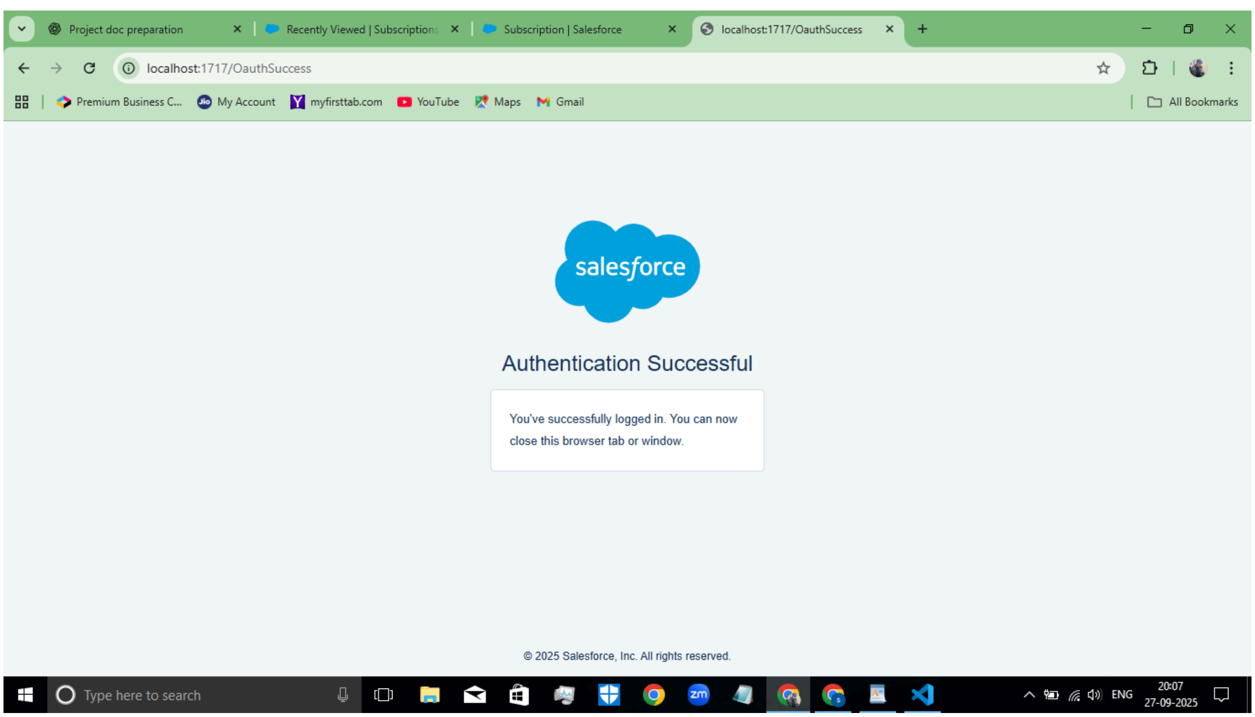

Salesforce data load mockup
Recently Viewed | Custom Paym
Duplicate Rules | Salesforce
Salesforce import of "Accounts
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgK0000047wPx%3Fsetupid...
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search Setup
Setup
Home
Object Manager
duplicate
Data
Duplicate Management
Duplicate Error Logs
Duplicate Rules
Matching Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Duplicate Rules
Custom Invoice Duplicate Rule
Custom_Invoice_Number_Duplicate_Rule
Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Activate
Rule Name
Custom_Invoice_Number_Duplicate_Rule
Order
1 of 1 [Reorder]
Description
Prevents creation of duplicate Custom Invoice records based on Invoice Number
Object
Custom Invoice
Record-Level Security
Enforce sharing rules
Action On Create
Block
Operations On Create
Alert
Report
Action On Edit
Allow
Operations On Edit
Alert
Report
Alert Text
A Custom Invoice with this Invoice Number already exists.
Active
Matching Rule
Invoice_Matching_Rule
Mapped
Matching Criteria
Custom Invoice: Invoice_Number EXACT MatchBlank = FALSE
Conditions
Created By
Sourabh Jain, 9/26/2025, 9:12 AM
Modified By
Sourabh Jain, 9/26/2025, 9:12 AM
Windows Defender User Interface
Type here to search
ENG
21:42
26-09-2025


Salesforce data load mockup
Recently Viewed | Custom Paym
Duplicate Rules | Salesforce
Salesforce import of "Accounts
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmgK0000047wTB%3Fsetupid...
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search Setup
Setup
Home
Object Manager
duplicate
Data
Duplicate Management
Duplicate Error Logs
Duplicate Rules
Matching Rules
Didn't find what you're looking for?
Try using Global Search.
SETUP
Duplicate Rules
Custom Payment Duplicate Rule
Custom_Payment_Duplicate_Rule
Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Activate
Rule Name
Custom_Payment_Duplicate_Rule
Order
1 of 1 [Reorder]
Description
Prevents creation of duplicate Custom Payment records based on Status or other key fields
Object
Custom Payment
Record-Level Security
Enforce sharing rules
Action On Create
Block
Operations On Create
Alert
Report
Action On Edit
Allow
Operations On Edit
Alert
Report
Alert Text
A payment with this status already exists.
Active
Matching Rule
Payment_Matching_Rule
Mapped
Matching Criteria
Custom Payment: Status EXACT MatchBlank = FALSE
Conditions
Created By
Sourabh Jain, 9/26/2025, 9:13 AM
Modified By
Sourabh Jain, 9/26/2025, 9:13 AM
Type here to search
ENG
21:44
26-09-2025

- Export data for backup using Data Export



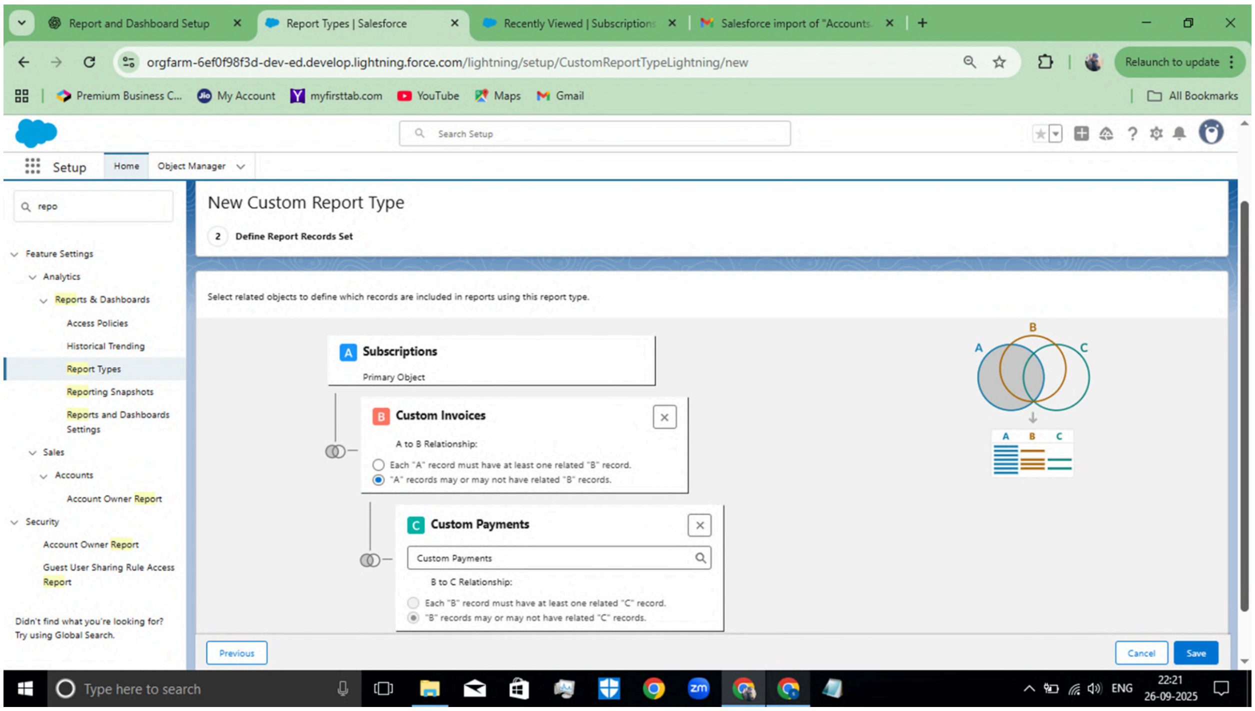
- Project Deployment : Created unmanaged package with Apex classes, flows, and LWCs. Deployed using SFDX: Deploy Source to Org command.

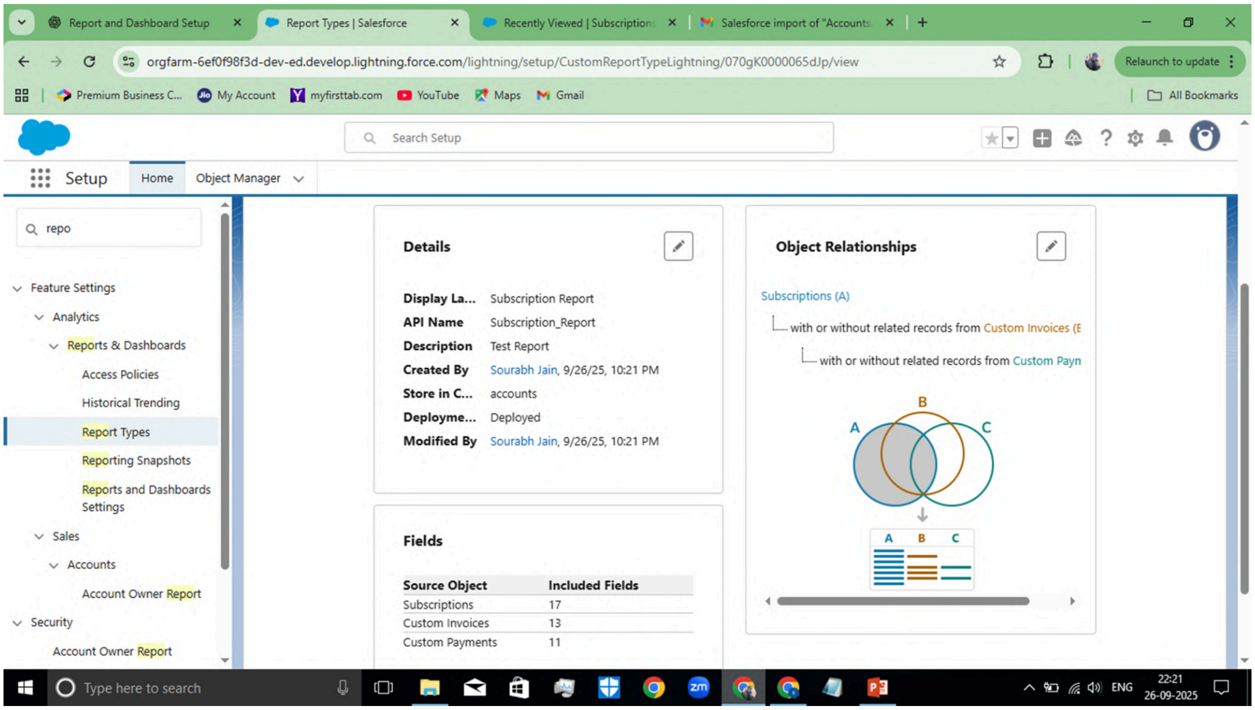


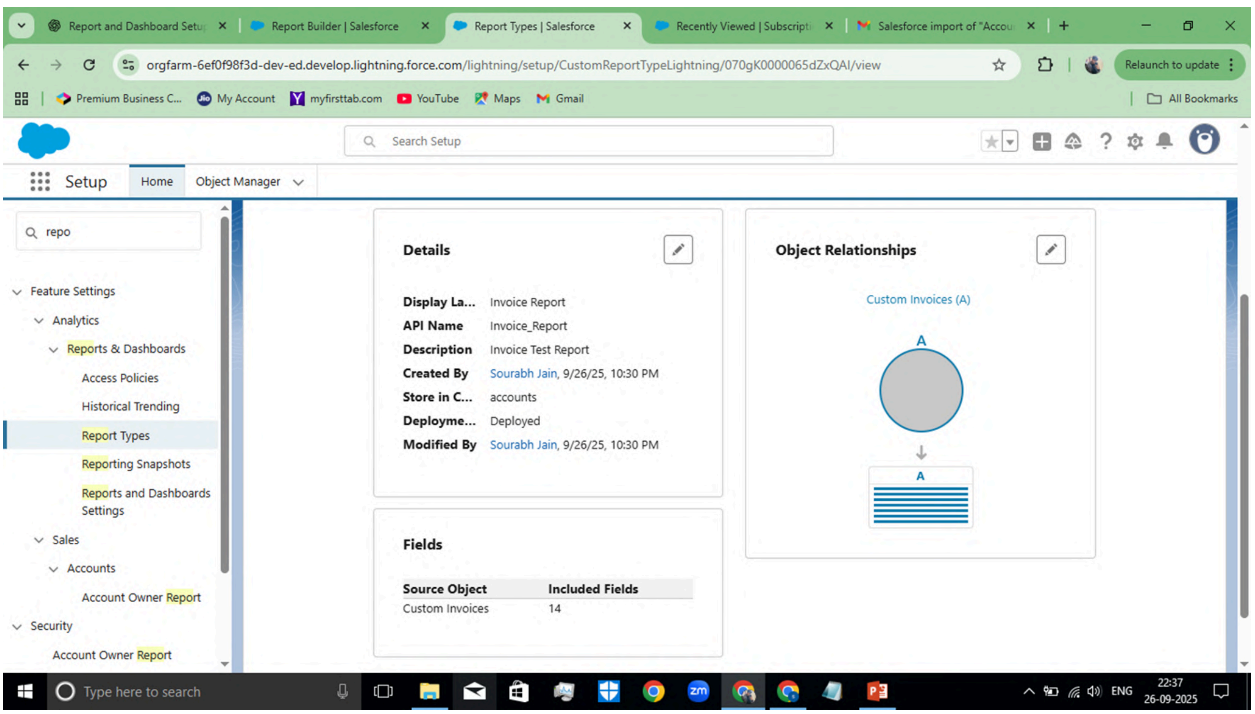
Phase 9 – Reporting, Dashboards & Security Review

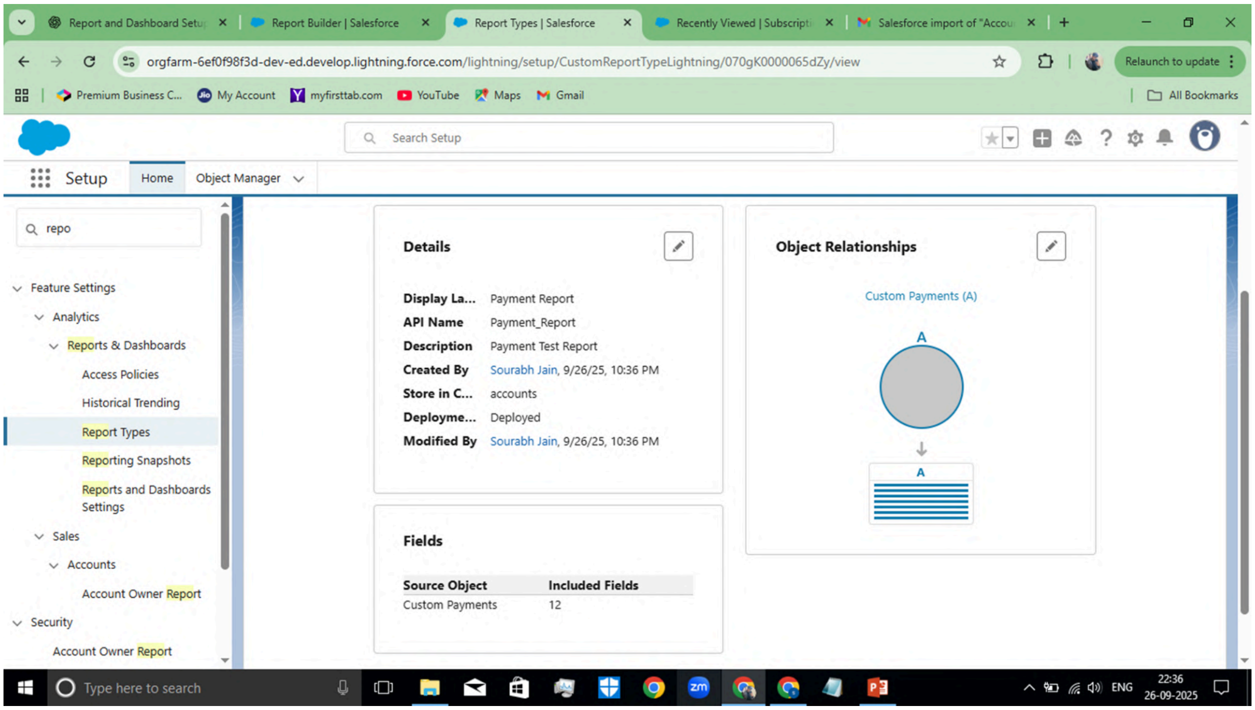
Goal : Create meaningful reports and dashboards to provide business insights and conduct a security review.

- Create **Custom Report Types** for Subscription + Invoice + Payment.




Report and Dashboard Setup
Report Types | Salesforce
Recently Viewed | Subscription
Salesforce import of "Accounts
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070gK0000065dJp/view
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search Setup
Setup
Home
Object Manager
repo
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Sales
Accounts
Account Owner Report
Security
Account Owner Report
Details
Display La... Subscription Report
API Name Subscription_Report
Description Test Report
Created By Sourabh Jain, 9/26/25, 10:21 PM
Store in C... accounts
Deployme... Deployed
Modified By Sourabh Jain, 9/26/25, 10:21 PM
Fields
Source Object Included Fields
Subscriptions 17
Custom Invoices 13
Custom Payments 11
Object Relationships
Subscriptions (A)
with or without related records from Custom Invoices (E
with or without related records from Custom Payn
A
B
C
Type here to search
ENG
22:21
26-09-2025


Report and Dashboard Setu
Report Builder | Salesforce
Report Types | Salesforce
Recently Viewed | Subscripti
Salesforce import of "Accou
orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypeLightning/070gK0000065dZxQAI/view
Relaunch to update
Premium Business C...
My Account
myfirsttab.com
YouTube
Maps
Gmail
All Bookmarks
Search Setup
Setup
Home
Object Manager
repo
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Sales
Accounts
Account Owner Report
Security
Account Owner Report
Details
Display La... Invoice Report
API Name Invoice_Report
Description Invoice Test Report
Created By Sourabh Jain, 9/26/25, 10:30 PM
Store in C... accounts
Deployme... Deployed
Modified By Sourabh Jain, 9/26/25, 10:30 PM
Fields
Source Object Included Fields
Custom Invoices 14
Object Relationships
Custom Invoices (A)
A
Type here to search
ENG
22:37
26-09-2025



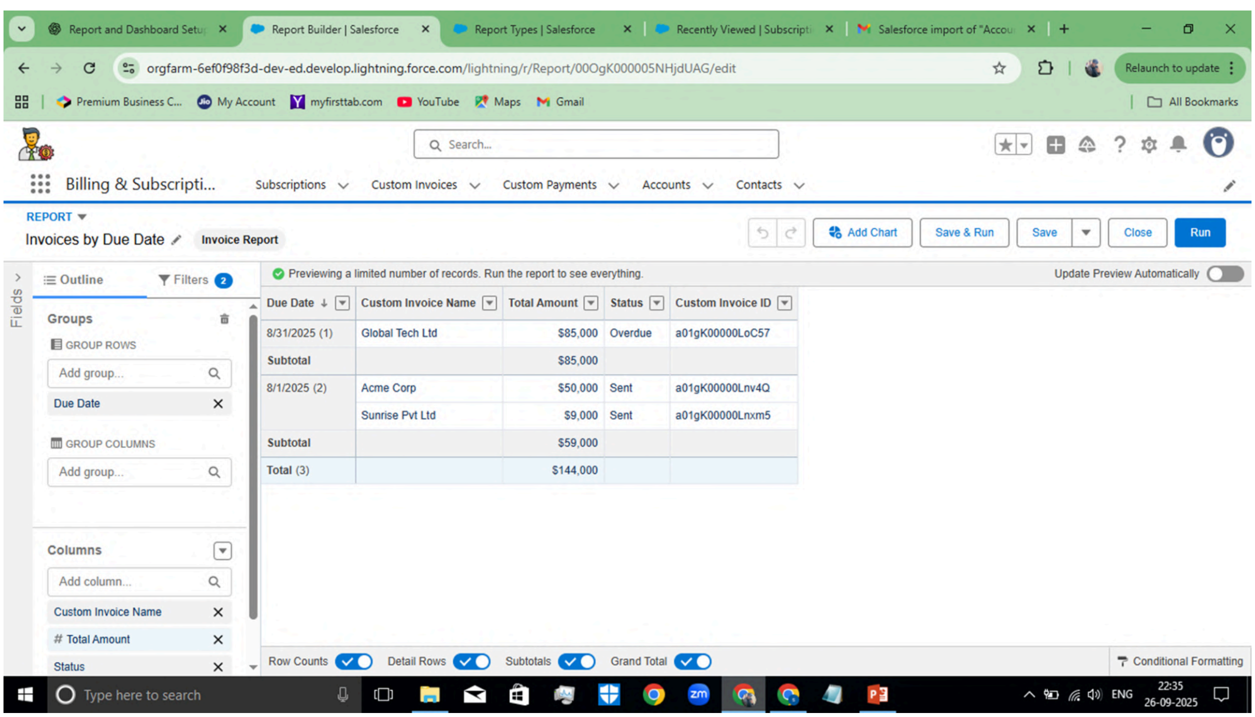
- Build **Reports**:

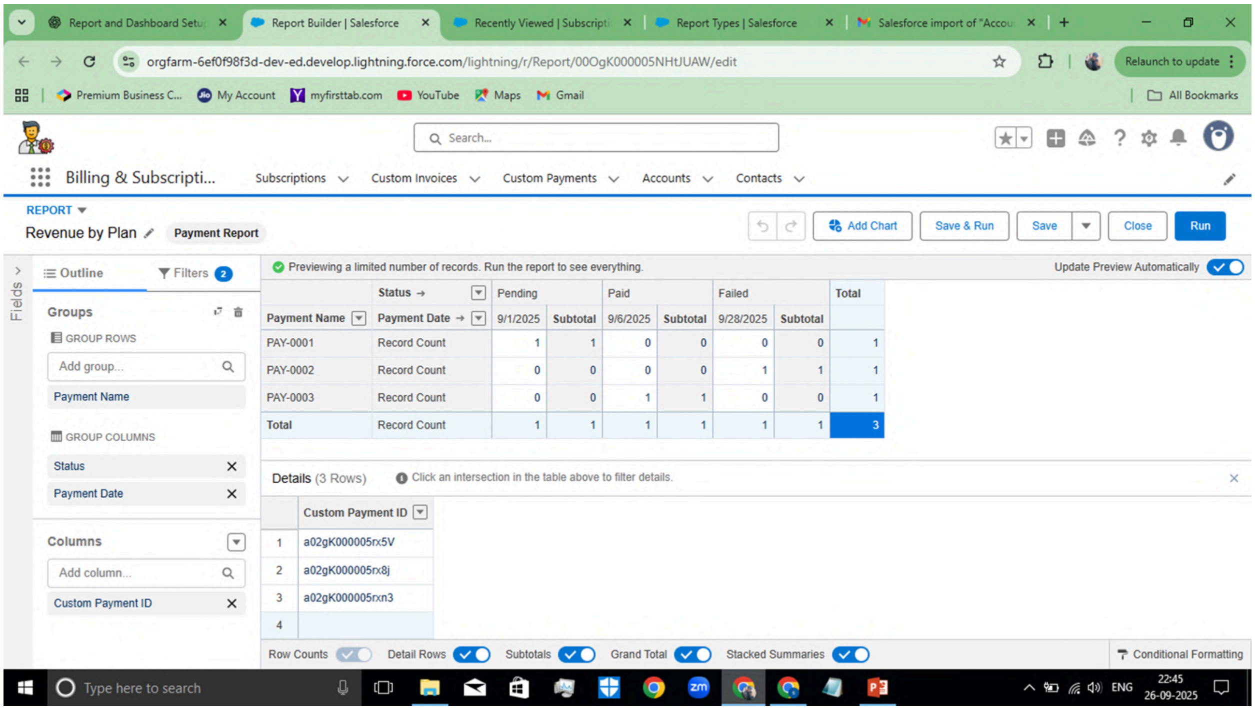
– Subscriptions by Status (Summary)

– Invoices by Due Date (Tabular)

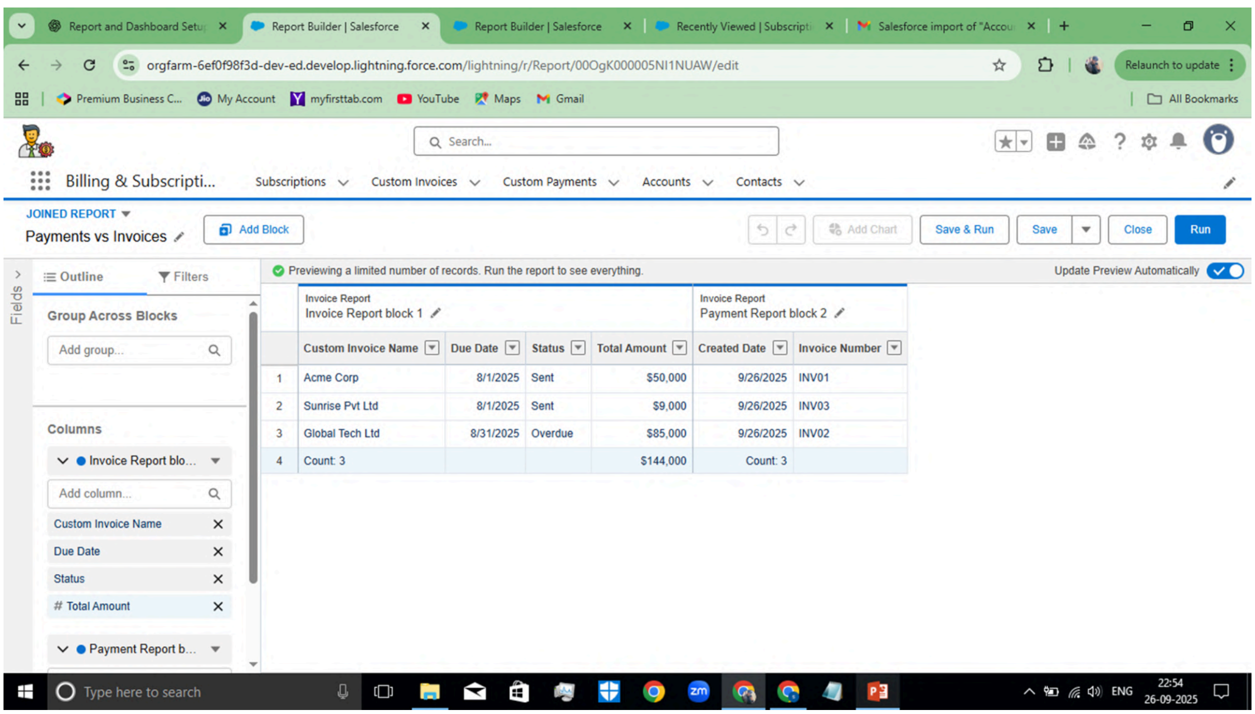
– Revenue by Plan (Matrix)

– Payments vs Invoices (Joined)



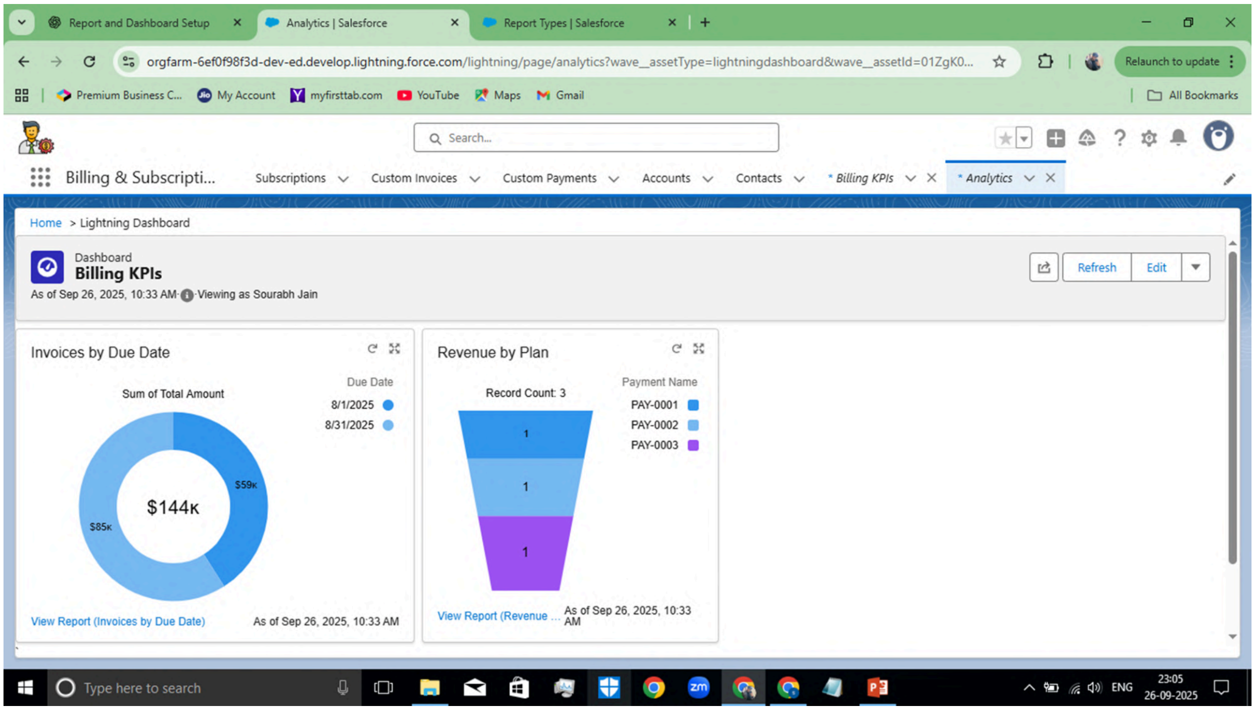


orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgK000005NHtJUAW/edit
Billing & Subscripti...
Subscriptions
Custom Invoices
Custom Payments
Accounts
Contacts
REPORT
Revenue by Plan
Payment Report
Add Chart
Save & Run
Save
Close
Run
Outline
Filters 2
Groups
GROUP ROWS
Payment Name
GROUP COLUMNS
Status
Payment Date
Columns
Custom Payment ID
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Status → | Pending | Paid | Failed | Total
Payment Name | Payment Date → | 9/1/2025 | Subtotal | 9/6/2025 | Subtotal | 9/28/2025 | Subtotal
PAY-0001 | Record Count | 1 | 1 | 0 | 0 | 0 | 0 | 1
PAY-0002 | Record Count | 0 | 0 | 0 | 0 | 1 | 1 | 1
PAY-0003 | Record Count | 0 | 0 | 1 | 1 | 0 | 0 | 1
Total | Record Count | 1 | 1 | 1 | 1 | 1 | 1 | 3
Details (3 Rows)
Click an intersection in the table above to filter details.
Custom Payment ID
1 a02gK000005rx5V
2 a02gK000005rx8j
3 a02gK000005rxn3
4
Row Counts
Detail Rows
Subtotals
Grand Total
Stacked Summaries
Conditional Formatting

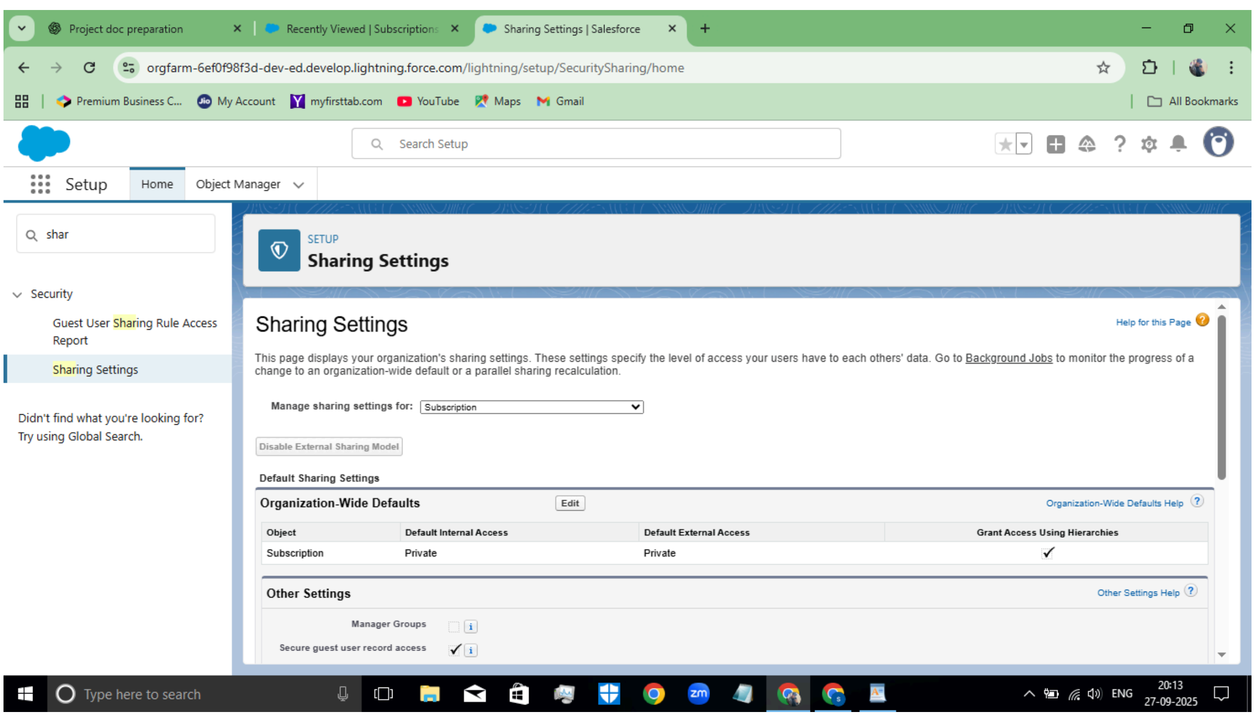


orgfarm-6ef0f98f3d-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgK000005NI1NUAW/edit
Billing & Subscripti...
JOINED REPORT
Payments vs Invoices
Add Block
Add Chart
Save & Run
Save
Close
Run
Outline
Filters
Group Across Blocks
Columns
Invoice Report blo...
Custom Invoice Name
Due Date
Status
Total Amount
Payment Report b...
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Invoice Report
Invoice Report block 1
Invoice Report
Payment Report block 2
Custom Invoice Name | Due Date | Status | Total Amount | Created Date | Invoice Number
1 Acme Corp | 8/1/2025 | Sent | $50,000 | 9/26/2025 | INV01
2 Sunrise Pvt Ltd | 8/1/2025 | Sent | $9,000 | 9/26/2025 | INV03
3 Global Tech Ltd | 8/31/2025 | Overdue | $85,000 | 9/26/2025 | INV02
4 Count: 3 | | | $144,000 | Count: 3 |

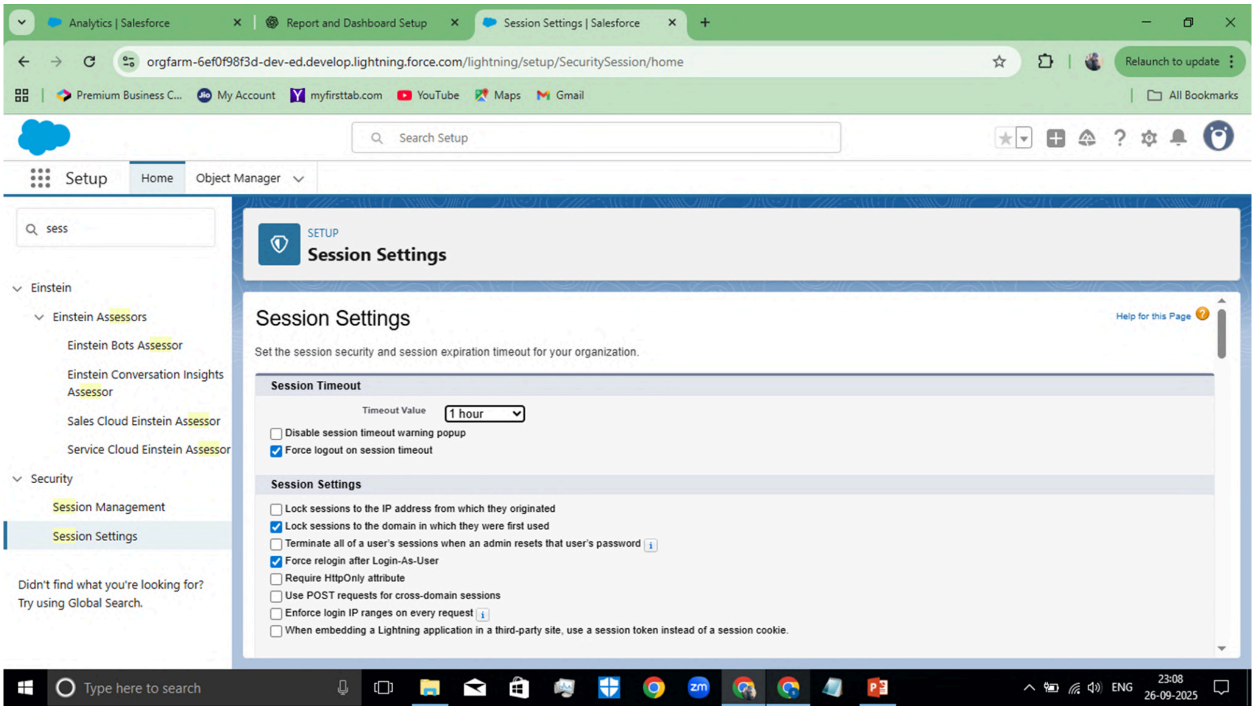
- Bundle into **Dashboards** (“Billing KPIs”). Use **Dynamic Dashboard** option.

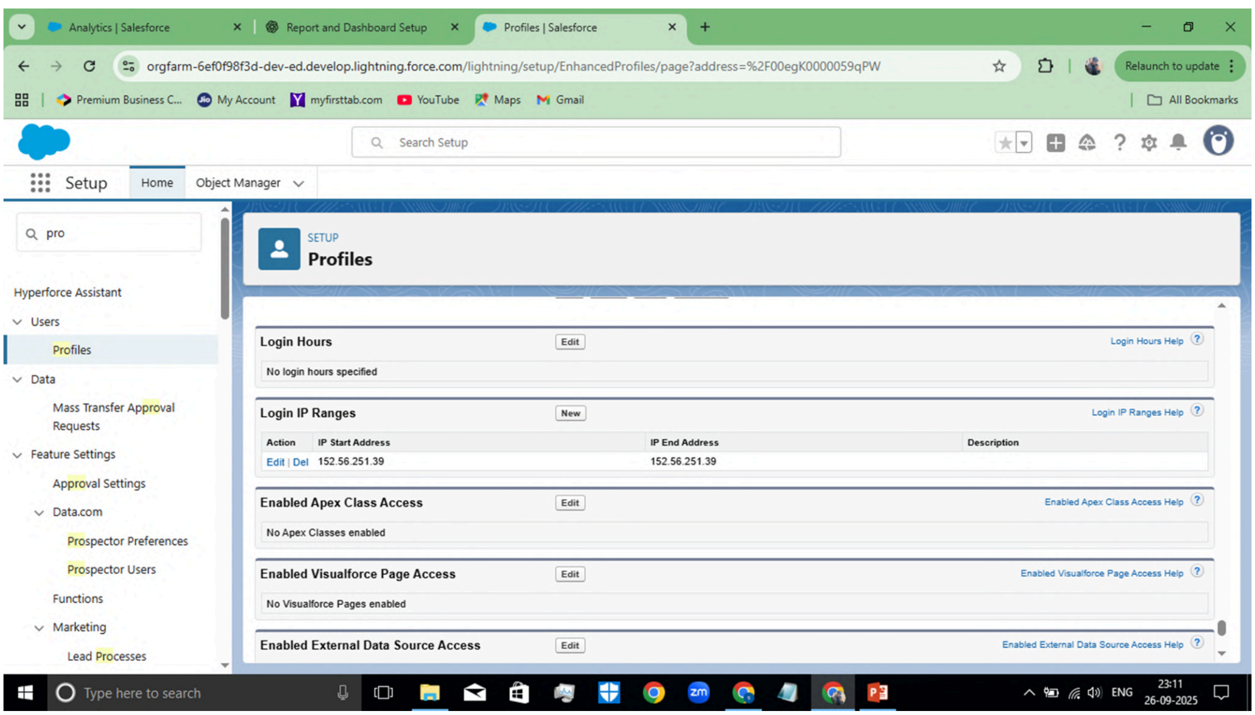


- Re-check **Sharing Settings** and **Field Level Security** for sensitive fields.



- Tighten **Session Settings** and configure **Login IP Ranges** for profiles as needed.

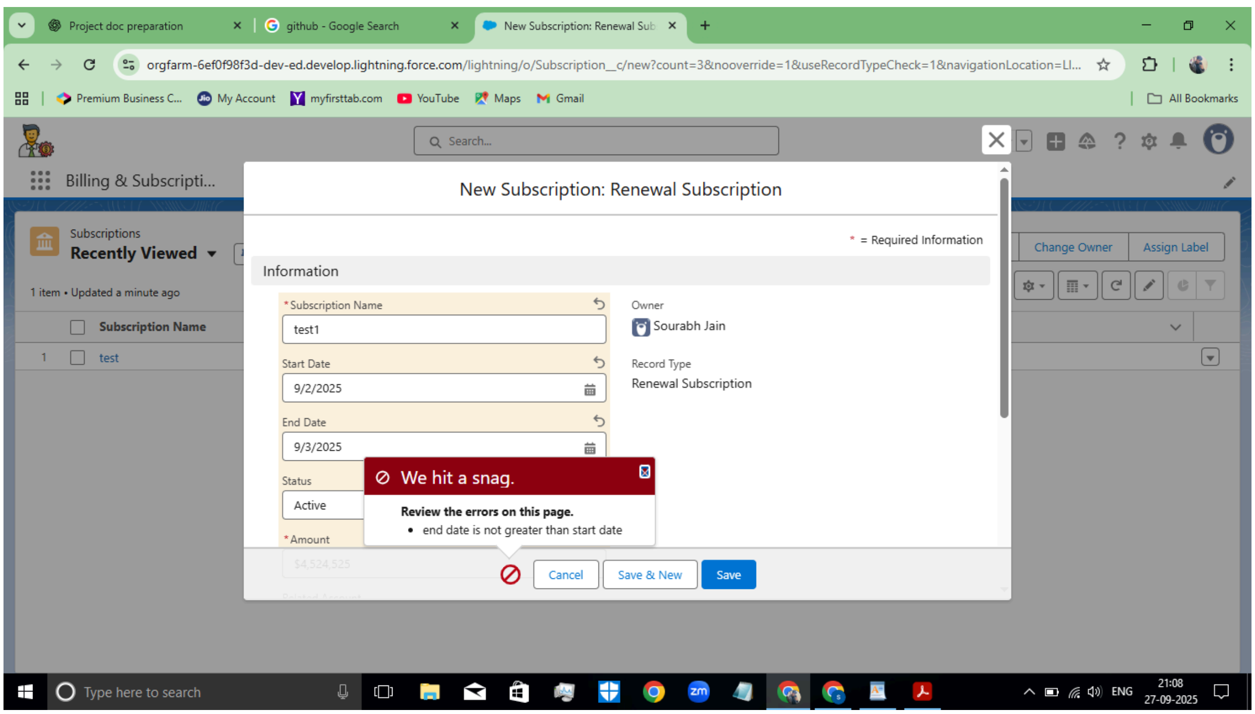




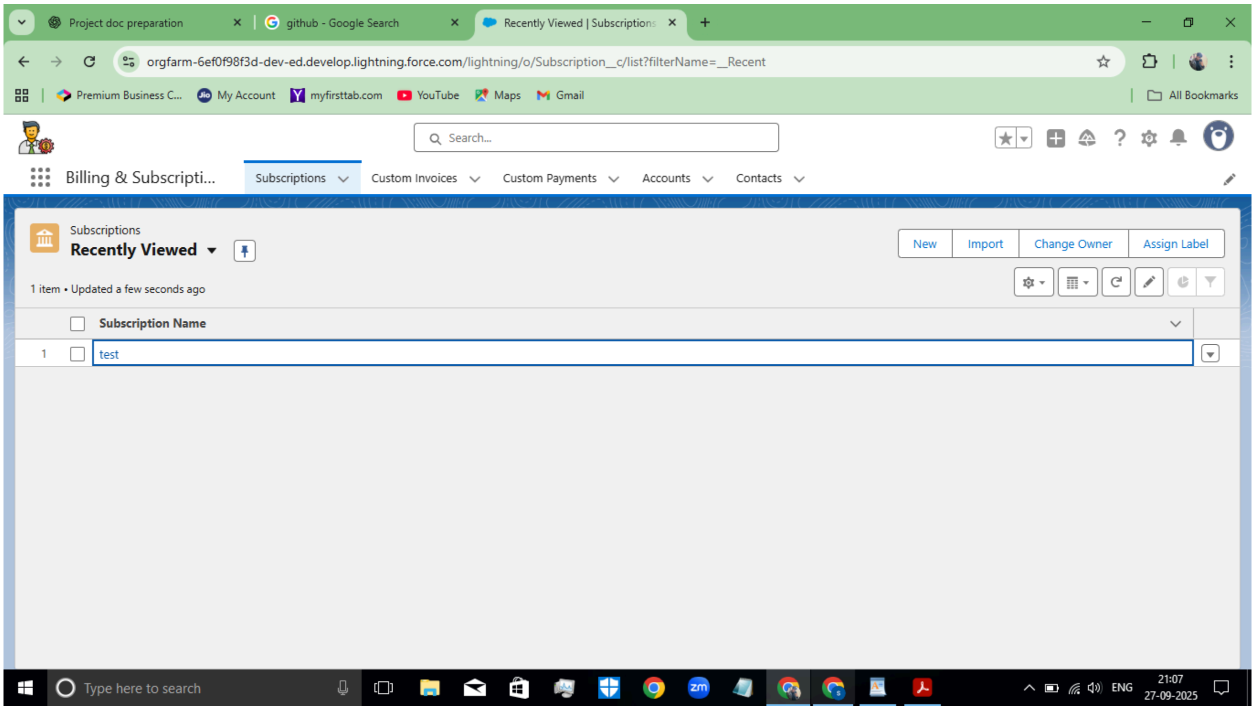
Phase 10: Quality Assurance Testing

Goal :
To verify that each Salesforce feature (custom objects, flows, triggers, validation rules, approval processes, LWCs) functions correctly, meets business requirements, and handles both valid and invalid inputs gracefully.

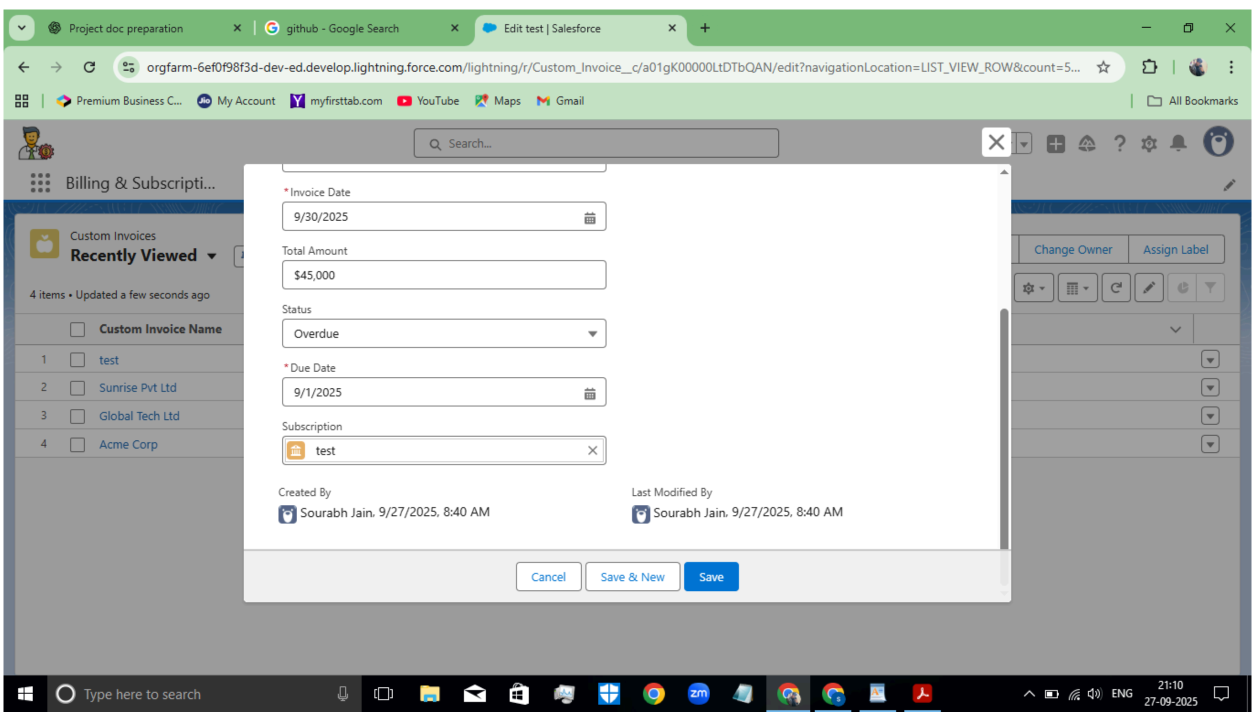
1. As you can see we cannot create the subscription because the end_date is not greater than the start_date.



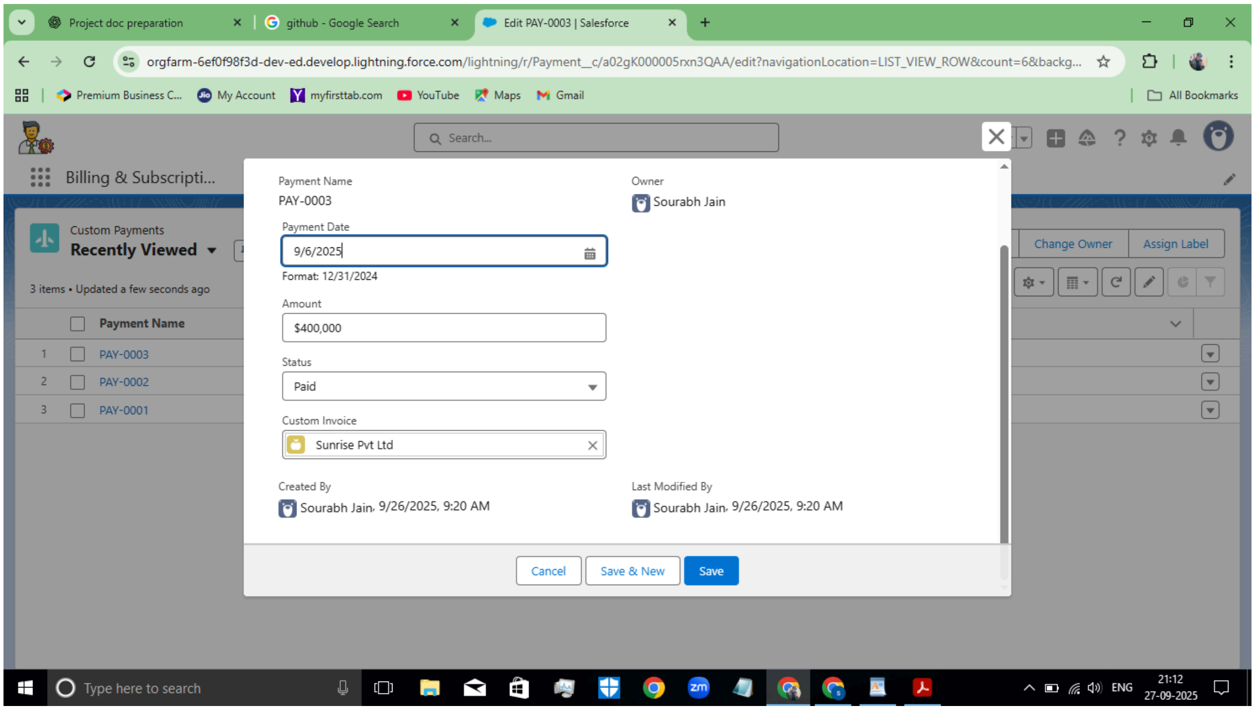
Now when the end date is updated the subscription record is saved successfully.



Now the custom invoice created show a lookup field related to the subscription record.



Now we can se the custom payment field include a lookup field related to
the custom invoice.



Key Attachments :

1. **Project Documentation**
   - Detailed project doc (phases, requirements, design).
   - User Guide (for Sales/Finance teams).
   - Technical Guide (objects, flows, Apex, security).
2. **QA & Testing Evidence**
   - Test case tables for each feature.

- Input & Output screenshots (record creation, validation errors, trigger results).
- Summary of total test cases vs. passed/failed.

3. **Configuration Snapshots**
    - Org setup screenshots (profiles, roles, OWD).
    - Sharing settings and field-level security screens.
4. **Automation & Code**
    - Apex triggers, classes, and test classes.
    - Flow diagrams and screenshots.
    - LWC component code and preview screenshots.
5. **Reports & Dashboards**
    - Screenshots of MRR, churn, outstanding invoices dashboards.
    - Example summary report outputs.
6. **Integration Evidence**
    - Connected App settings screenshots.
    - Named Credential and Remote Site Setting configs.
7. **Deployment Artifacts**
    - Unmanaged package details.
    - SFDX deployment logs/screenshots.

- **Future Plans :**

1. Enhanced Analytics & Predictive Insights

Build AI-powered dashboards to forecast churn, predict revenue, and highlight at-risk customers.

Use Salesforce Einstein or Tableau CRM to give managers predictive metrics like expected renewals or failed payment probability.

2. Self-Service Customer Portal

Deploy an Experience Cloud (Community) portal where customers can:

- View subscriptions, invoices, and payment history.
- Download invoices or update payment methods securely.
- Request upgrades or downgrades without agent involvement.

3. Multi-Currency & Multi-Region Support

Extend the data model and automations to handle different currencies, tax rates (GST/VAT), and compliance requirements across regions.

Integrate with local payment gateways for better conversion.

4. Advanced Payment Handling

Add automated retry logic for failed payments.

Integrate with multiple gateways (Stripe, PayPal, Razorpay, etc.) for redundancy.

Support partial payments and credits/refunds directly from Salesforce.

5. Automate Renewal & Upsell Campaigns

Combine Marketing Cloud or Pardot with your subscription data to automatically send upgrade offers or renewal campaigns to customers nearing expiration.

6. Enhanced Compliance & Security

Implement PCI DSS guidelines for storing/handling card info (via tokenization).

Add advanced audit logging and two-factor authentication for finance roles.

7. Mobile Access & Field Rep App

Build a lightweight mobile app or Salesforce mobile configuration so field reps can manage subscriptions and payments on the go.

8. Deeper Integrations

Connect with accounting/ERP software (QuickBooks, NetSuite, SAP) for seamless reconciliation.

Expose APIs for partner systems to create subscriptions and fetch invoices in real time.

9. Automated Testing Framework

Create reusable automated test scripts for each feature (Flows, Triggers, Validation Rules) to reduce manual QA effort in future releases.

10. Continuous Deployment Pipeline

Implement a DevOps pipeline (GitHub + Salesforce DX + CI/CD) for automated deployments and version control.

Conclusion: Successfully presented the "**SUBSCRIPTION & BILLING MANAGEMENT – CRM PROJECT**" & Demonstrate the complete subscription-to-payment process to stakeholders, show dashboards, collect feedback, and deliver user/technical documentation for smooth adoption.