OTT Subscription CRM Project

# Phase 1: Problem Understanding & Industry Analysis

👉 Goal: Understand what we’re building and why.

**1. Requirement Gathering**○ Talk to stakeholders (OTT platform managers, customer support, marketing team).  
○ Example requirements:  
■ Track all subscribers with active/inactive status.  
■ Manage subscription life-cycle (trial, active, renewal, cancellation).  
■ Prevent duplicate subscriptions for same user.  
■ Generate revenue and churn reports.

**2. Stakeholder Analysis**  
○ Admin (system setup).  
○ Customer Support (handles issues/refunds).  
○ Marketing (runs campaigns & upselling).  
○ Finance (tracks payments & invoices).

**3. Business Process Mapping**○ Flow: Customer signs up → Chooses plan → Payment processed → Subscription activated → Renewal or Cancellation.

**4. Industry-specific Use Case Analysis**○ OTT platforms rely on subscriber retention, content engagement, and automated renewals.  
○ Need to automate renewals, churn tracking, and content recommendation.

**5. AppExchange Exploration**  
○ Explore OTT subscription apps, but build custom Salesforce solution for learning.

# Phase 2: Org Setup & Configuration

👉 Goal: Prepare Salesforce environment.

1. **Salesforce Editions** – Developer Org.  
2. **Company Profile Setup** – Add org details, time zone, currency.  
3. **Business Hours & Holidays** – Define support hours.  
4. **Fiscal Year Settings** – Standard (Jan–Dec).  
5. **User Setup & Licenses** – Roles: Support, Marketing, Finance.  
6. **Profiles** – Define access.  
7. **Roles** – Manager > Support > Agents.  
8. **Permission Sets** – Extra permissions for reporting.  
9. **OWD (Org-Wide Defaults)** – Subscription private, Plans public.  
10. **Sharing Rules** – Share subscriptions with managers.  
11. **Login Access Policies** – Restrict support staff.  
12. **Dev Org Setup** – Build & test here.  
13. **Sandbox Usage** – Move to production in real case.  
14. **Deployment Basics** – Change sets / SFDX.

# Phase 3: Data Modeling & Relationships

👉 Goal: Build data structure.

**1. Standard & Custom Objects**  
○ Standard: Contact (Subscriber).  
○ Custom: Subscription\_\_c, Plan\_\_c, Payment\_\_c, Refund\_\_c.  
**2. Fields**  
○ Subscription: Start Date, End Date, Status, Auto-Renew.  
○ Plan: Name, Price, Duration.  
○ Payment: Amount, Date, Status.  
**3. Record Types** – Monthly vs Yearly Plans.  
**4. Page Layouts** – Subscription shows Payments & Refunds.  
**5. Compact Layouts** – Show Subscriber + Plan + Status.  
**6. Schema Builder** – Visualize model.  
**7. Lookup vs Master**-Detail – Subscriber ↔ Subscription (Lookup).

# Phase 4: Process Automation (Admin)

**○ Validation Rules** – End Date must be after Start Date.

**○ Flows** – Renewal reminders, Refund processing.

**○ Approval Process** – High-value refunds need manager approval.

**○ Email Alerts** – Reminder for renewals & confirmations.

**○ Custom Notifications** – Notify support when payment fails.

# Phase 5: Apex Programming (Developer)

**○ Trigger** – Auto-generate new subscription on renewal.

**○ Class** – Subscription Service for reusable logic.

**○ Batch Apex** – Mark expired subscriptions nightly.

**○ Future Methods** – Call external payment APIs.

**○ Test Classes** – Validate triggers & flows.

# Phase 6: User Interface Development

**○ Lightning App** – OTT Subscription CRM.

**○ Tabs** – Subscribers, Subscriptions, Plans, Payments.

**○ LWC** – Search Subscriber, show active subscriptions.

**○ Dashboard Home Page** – Revenue & Active Users.

# Phase 7: Integration & External Access

**○ Payment Gateway Integration** – Stripe, Razorpay.

**○ REST API Callouts** – Fetch payment status.

**○ Named Credentials** – Securely store keys.

**○ Platform Events** – Notify failed payments.

# Phase 8: Data Management & Deployment

○ **Data Import Wizard** – Upload sample subscribers.

○ **Data Loader** – Bulk load subscriptions.

○ **Duplicate Rules** – Prevent duplicate users.

○ **Change Sets** – Deploy from Sandbox → Production.

# Phase 9: Reporting, Dashboards & Security Review

○ **Reports** – Revenue by Plan, Churn Rate.

○ **Dashboards** – Active Subscribers, Refund Trends.

○ **Dynamic Dashboards** – Each Manager sees only their data.

○ **Field Level Security** – Hide sensitive data.

○ **Audit Trail** – Track changes.

# Phase 10: Final Presentation & Demo Day

**○ Pitch** – Problem → Solution → Benefits.

○ **Demo** – Create subscription, renewal, refund.

○ **Documentation** – Share user guide & design doc.

**○ Portfolio Showcase** – Add to LinkedIn/GitHub.