

# Subscription / Personal Services Tracker CRM

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## Project Overview:

This Salesforce CRM project helps small businesses and service providers efficiently manage subscriptions like gym memberships, OTT services, etc. It automates renewal reminders, tracks payments, generates reports, and offers secure, role-based access.

### Phase 1: Problem Statement

Small businesses often struggle with manual subscription tracking, missed renewals, and payment delays.

There's no centralized system to monitor subscriptions, send reminders, or analyze trends.

This project aims to solve these challenges using an automated Salesforce CRM solution.

Goal: Reduce manual errors and improve customer retention through automation.

### Phase 2: Org Setup & Configuration

Set up a Salesforce Developer Org and configured company information.

Created user profiles and a custom Lightning App called "**Subscription CRM**" to serve as the working space for development.

Tools Used: Salesforce Setup, App Manager

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### ◆ Phase 3: Data Modeling & Relationships

Created custom objects: **Subscription, Payment, and Service Type**.

Defined relationships between Contacts and Subscriptions, and between

Subscriptions and Payments.

Tools Used: Object Manager, Schema Builder

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#### ◆ Phase 4: Process Automation (Admin)

Automated key actions using **Flows**.

Set up a Scheduled Flow for **subscription renewal reminder emails**, and a Record-Triggered Flow for **payment overdue alerts**.

Tools Used: Flow Builder, Email Alerts

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#### ◆ Phase 5: Apex Programming (Developer)

Wrote custom **Apex triggers and classes** for business logic, like automatically setting a subscription to "Expired" when the end date passes. Also developed a test class to ensure code quality.

Tools Used: Developer Console, Apex Classes, Triggers

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#### ◆ Phase 6: User Interface Development

Customized Lightning Record Pages for a clean and user-friendly experience.

Displayed related lists and fields in organized sections, and added navigation tabs for all key objects.

Tools Used: Lightning App Builder, Page Layouts

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#### ◆ Phase 7: Integration & External Access

Enabled secure **REST API integration** by creating a Connected App with OAuth 2.0.

Used **Postman** to test GET/POST operations for Subscription records using

access tokens.

Tools Used: Connected Apps, REST API, Postman

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### ◆ Phase 8: Data Management & Deployment

Imported sample data using the **Data Import Wizard**, and exported data via **Data Loader**.

Created a **Change Set** to deploy components and performed a full org backup.

Tools Used: Data Import Wizard, Data Loader, Change Sets

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### ◆ Phase 9: Reporting, Dashboards & Security Review

Created analytical **reports** for subscriptions and revenue.

Built an interactive **dashboard** with bar, line, and donut charts.

Reviewed profile permissions, field-level access, and sharing rules.

Tools Used: Report Builder, Dashboard Builder, Profile Settings

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### ◆ Phase 10: Quality Assurance Testing

Tested all features like CRUD operations, automations, UI layouts, reports, and security settings.

Logged and resolved bugs, confirming that the CRM works as expected.

Tools Used: Manual Testing, Flow Debugging, Role-Based Testing

### Final Result:

A fully functional, automated **Subscription Tracker CRM**, built in Salesforce using declarative tools, automation, Apex code, and real-time analytics.

It is secure, scalable, and ready for real-world deployment or demo.

