

Subscription / Personal Services Tracker CRM

Phase 4: Process Automation (Admin)

OBJECTIVE:

To automate business processes using Salesforce Flows. In this CRM, we will:

1. Send Reminder Emails: 7 days before a subscription expires.
2. Notify of Overdue Payment: If a payment is not marked "Paid" after due date.

TOOLS USED:

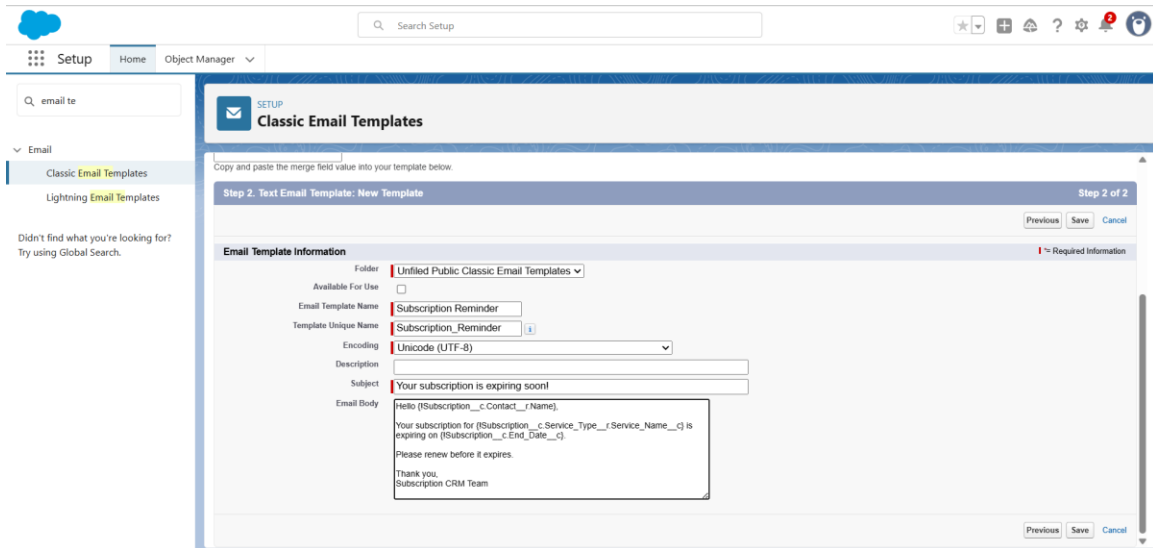
- Salesforce Flow Builder
- Scheduled Flow
- Record-Triggered Flow
- Email Alerts
- Email Templates

Send Reminder Email – 7 Days Before Subscription End Date

Step 1: Create Email Template

Navigation:

App Launcher → Email Templates → New Email Template



Step 2: Create Scheduled Flow

Navigation:

Setup → Flows → New Flow → Scheduled-Triggered Flow

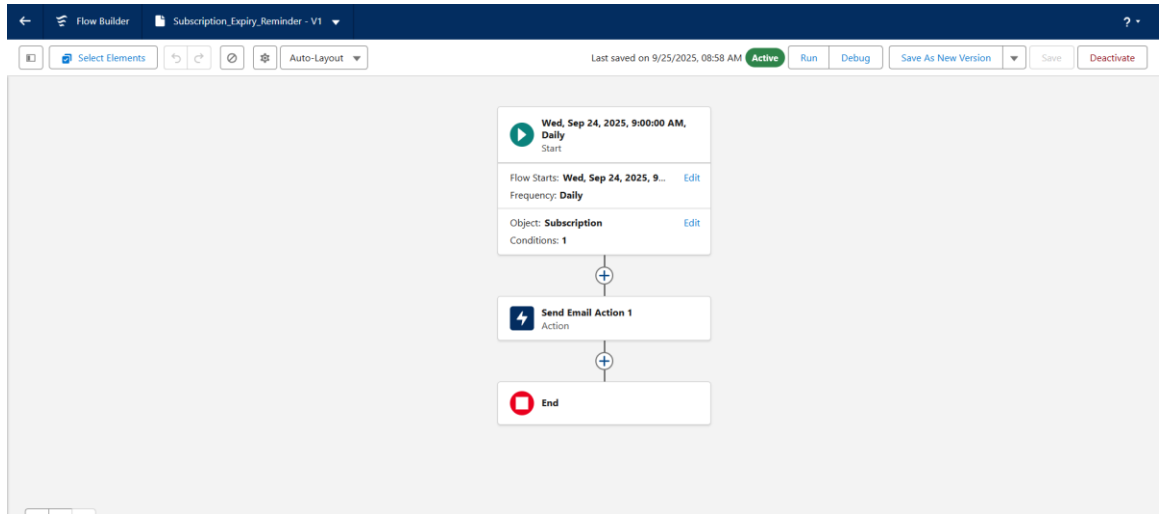
Define Filter Criteria:

- **End Date** → Equals → TODAY() + 7
- **Renewal Status** → Equals → "Active"

Add Action: **Send Email Alert**

Email Action:

- Action Type: **Send Email**
- Use: **Email Template: Subscription Reminder**
- Recipient: Contact__r.Email

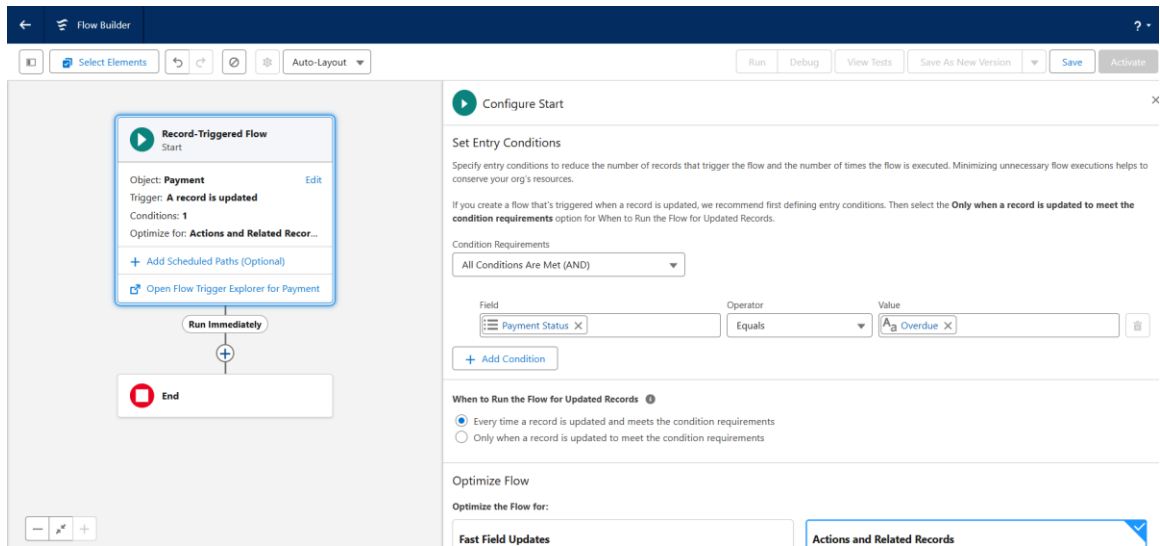


Notify Admin When Payment is Overdue

Step 1: Create Email Template

Navigation:

Email Templates → New



Step 2: Create Record-Triggered Flow

Navigation:

Setup → Flows → New Flow → Record-Triggered Flow

Add Action: Send Email

- Action: **Send Email**
- Use Template: **Payment Overdue Notification**
- Recipient: hardcode to your own email (for now)

Save & Activate

Flow Name: Payment_Overdue_Notification

