

Subscripify :- Subscription Box Service Management System

Phase 1: Problem Understanding & Industry Analysis

Requirement Analysis: -

Subscriber & Subscription Management

Track subscriber status as Active, Paused, or Canceled and allow admins to create and edit subscription tiers with unique pricing and products.

Automated Billing & Fulfillment

Automated billing engine to generate invoices and process monthly payments. It also Handle failed payments by notifying customers to update payment info. Real-time inventory tracking with automatic stock deduction to prevent overselling.

Subscriber Self-Service Portal

Portal for subscribers to update shipping and payment details. Options to pause, resume, or cancel subscriptions. Access to order history, including payments and shipments.

Business Analytics & Reporting

Dashboard for viewing key business metrics. It also Reports on Monthly Recurring Revenue (MRR), Customer Churn Rate, and Inventory Levels.

Stakeholder Analysis :-

Subscription Manager: It Oversees daily operations, manages subscription plans, and monitors business performance dashboards.

Fulfillment Coordinator: Manages product inventory and processes paid orders for shipping from a clear fulfillment queue.

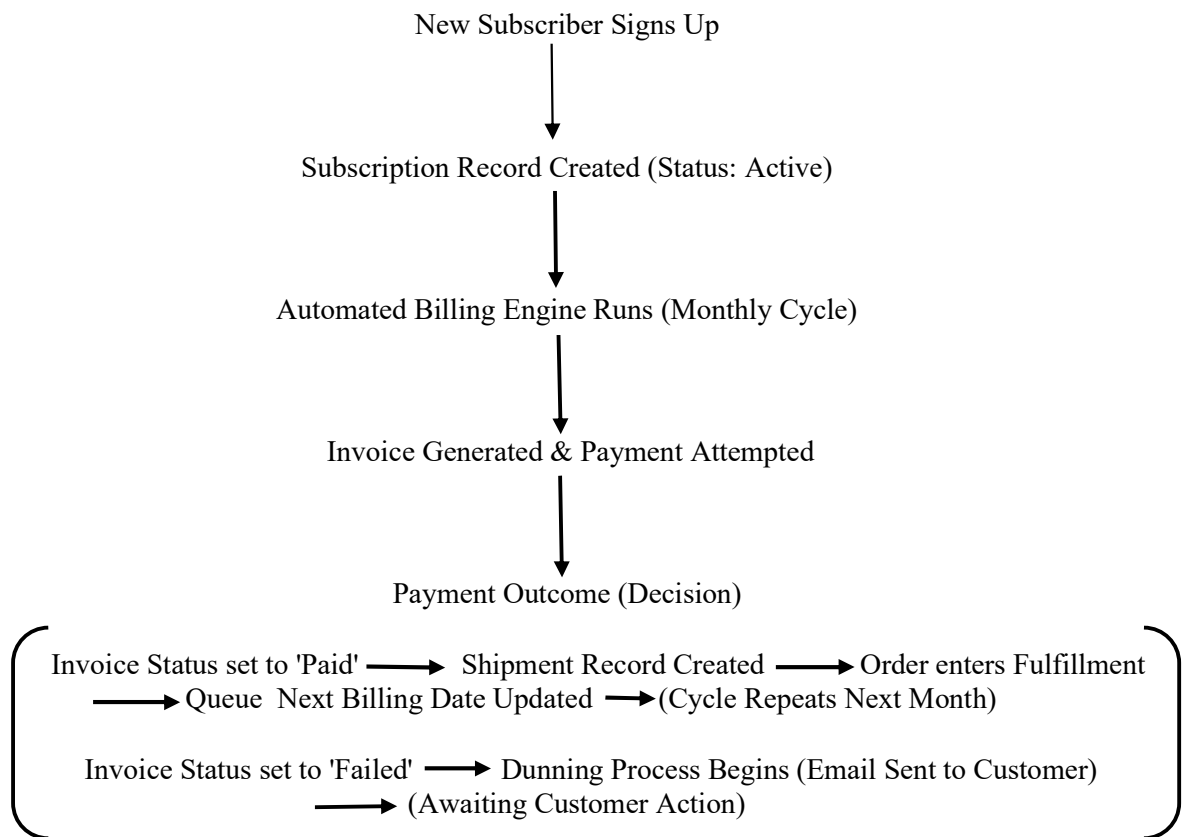
Finance Manager: Monitors revenue reports, tracks failed payments, and manages refund approvals.

Subscriber (External User): The end customer who uses the self-service portal to manage their account and subscription.

System Admin: Manages the system configuration, security, and deployments.

Subscripify :- Subscription Box Service Management System

Business Flow Mapping: -



Industry-specific Use Case Analysis

The Subscripify platform is specifically designed to address the unique challenges of the subscription box industry. Its primary function is to serve as a reliable, automated **recurring revenue engine**, managing the entire monthly cycle of billing and payments. The key goal is to reduce customer cancellations with features designed to keep them, like a flexible "pause subscription" option. Also, because we ship physical goods, the system requires precise, real-time inventory management to prevent selling out-of-stock items and ensure happy customers.

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	chatter	chattyt0dgl00000bt5oja1_4kfnb4ionagd@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIC	epic-e09780ec-1759@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Sharma_Akshat	aks	akshatlade4174@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Singh_Rohan	subs	rohan@subscriptionify.in		✓	Subscription Admin
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00dgl00000bt5oja1.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00dgl00000bt5oja1.com		✓	Analytics Cloud Security User
<input type="checkbox"/>	Edit	Verma_Aakash	rverma	aakash@subscriptionify.in		✓	Fulfillment User

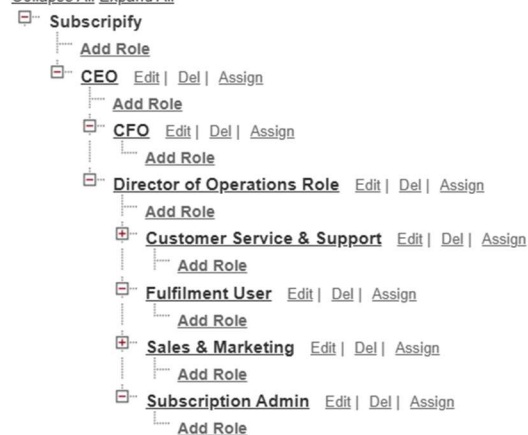
Subscripify :- Subscription Box Service Management System

Profiles

- **Subscription Admin Profile** – Complete system access which runs the day-to-day operations of the service.
- **Fulfilment User Profile** – It is highly restricted and gives them access only to the tools needed to physically pack and ship customer order.
- **Customer Profile** – It is for external subscribers who log into the customer portal.

Your Organization's Role Hierarchy

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



Roles

- **Director of Operations Role** – Top-level in the business hierarchy, oversees the entire subscription lifecycle and monitors overall business performance.
- **Subscription Manager Role** – Manages the core business functions, including subscription plans, automated billing cycles, and subscriber analytics.
- **Fulfillment Coordinator Role** – Manages the physical logistics of the operation, including inventory levels and the fulfillment of paid orders.

Permission Sets

- **Billing & Refund Adjustments :-** It Grants special permission to edit paid invoices or process refunds. Assigned to senior managers as needed.
- **Product Catalog Manager :-** It Grants access to create and edit Product records (subscription plans and items), separate from the main Subscription Admin profile.

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OWD (Org-Wide Defaults)

- **Subscription Records :-** Private. This is critical to protect each subscriber's personal and plan information.
- **Invoice Records :-** Private. Protects sensitive customer financial history.
- **Product Inventory :-** Public Read/Write. All internal users can see and manage stock levels.

Sharing Rules

A criteria-based sharing rule will be created to automatically grant read-only access to Invoice records to the Fulfillment Team public group. This rule will trigger when an invoice's Status is marked as 'Paid', ensuring the fulfillment team can only see orders that are ready to be shipped.

Login Access Policies

The policy of logging in as an administrator will be activated. This crucial setting enables System Administrators to log in as other users (such as the Fulfillment Coordinator or Subscription Manager) in order to effectively support and troubleshoot any user-specific issues without needing the password.

Dev Org Setup

- A Salesforce Developer Edition Org will serve as the primary environment for all configuration, custom development (Apex, LWC), and implementation of the Subscripify platform.
- All unit testing, system validation, and final demonstration preparation will be performed within this dedicated environment.

Deployment Basics

- A modern, professional development lifecycle will be followed to ensure best practices are maintained.
- All new features will be developed and tested in a Developer Sandbox to isolate work-in-progress from the stable main environment.
- Completed features will be deployed from the sandbox to the main Developer Org (acting as 'Production') using Salesforce DX (SFDX) and a source control repository (Git), which is the current industry standard for Salesforce development.

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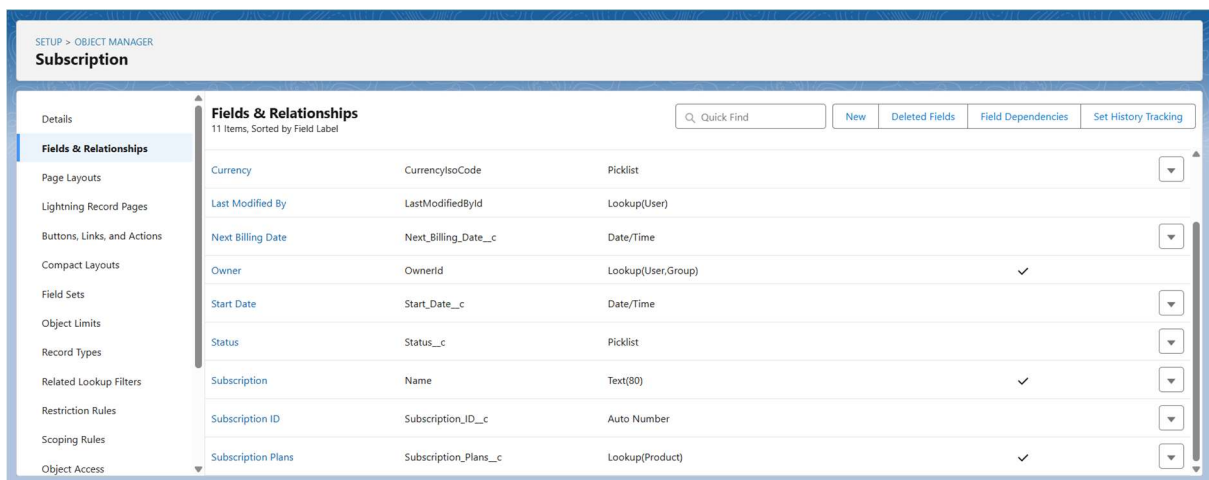
Phase 3: Data Modelling & Relationships

- **Custom Objects & Fields**

- 1. **Subscription (Subscription__c)**

- Fields:**

- Subscription ID (Auto-Number)
- Subscriber (Lookup → Contact)
- Subscription Plan (Lookup → Product2)
- Status (Picklist: Active, Paused, Canceled)
- Start Date (Date)
- Next Billing Date (Date)
- Cancellation Date (Date)
- Currency (Currency)



SETUP > OBJECT MANAGER
Subscription

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access

Fields & Relationships
11 Items, Sorted by Field Label

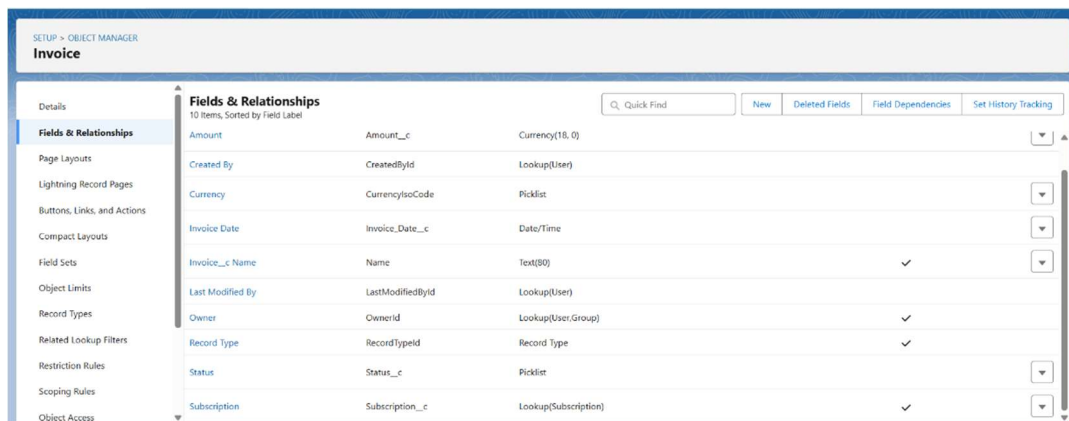
Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Currency	CurrencyIsoCode	Picklist	
Last Modified By	LastModifiedById	Lookup(User)	
Next Billing Date	Next_Billing_Date__c	Date/Time	
Owner	OwnerId	Lookup(User,Group)	✓
Start Date	Start_Date__c	Date/Time	
Status	Status__c	Picklist	
Subscription	Name	Text(80)	✓
Subscription ID	Subscription_ID__c	Auto Number	
Subscription Plans	Subscription_Plans__c	Lookup(Product)	✓

- 2. **Invoice (Invoice__c)**

- Fields:**

- Invoice Number (Auto-Number)
- Subscription (Lookup → Subscription__c)
- Status (Picklist: Draft, Unpaid, Paid, Payment Failed, Refunded)
- Invoice Date (Date)
- Amount (Currency)
- Payment Method (Picklist)



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Invoice

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Fields & Relationships
10 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Amount	Amount__c	Currency(18, 0)	
Created By	CreatedById	Lookup(User)	
Currency	CurrencyIsoCode	Picklist	
Invoice Date	Invoice_Date__c	Date/Time	
Invoice__c Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Record Type	RecordTypeId	Record Type	✓
Status	Status__c	Picklist	
Subscription	Subscription__c	Lookup(Subscription)	✓

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3. Product Inventory (Product_Inventory__c)

Fields:

- Product (Lookup → Product2)
- SKU (Text)
- Quantity In Stock (Number)
- Re-Order Threshold (Number)
- Warehouse Location (Text)

SETUP > OBJECT MANAGER
Product Inventory

Details

Fields & Relationships
9 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓
Product Inventory Name	Name	Text(80)		✓
Quantity In Stock	Quantity_In_Stock__c	Number(18, 0)		
Re-Order Threshold	Re_Order_Threshold__c	Number(18, 0)		
Stock Keeping Unit	Stock_Keeping_Unit__c	Auto Number		

4. Shipment (Shipment__c)

Fields:

- Shipment ID (Auto-Number)
- Related Invoice (Lookup → Invoice__c)
- Subscriber (Lookup → Contact)
- Status (Picklist: Ready to Ship, Shipped, Delivered)
- Tracking Number (Text)
- Shipping Address Snapshot (Text Area)

SETUP > OBJECT MANAGER
Shipment

Details

Fields & Relationships
10 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Currency	CurrencyIsoCode	Picklist		
Invoice	Invoice__c	Lookup(Invoice)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Shipment Name	Name	Text(80)	✓	
Shipping Address	Shipping_Address__c	Long Text Area(32768)		
Status	Status__c	Picklist		
Subscriber	Subscriber__c	Lookup(Subscription)	✓	
Tracking Number	Tracking_Number__c	Text(10)		

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- **Page Layouts**

- **Subscription Page Layout** → Show subscriber details, the selected subscription plan, current Status (e.g., Active/Paused), and the Next Billing Date.
- **Invoice Page Layout** → Show the related subscription, the invoice Status (e.g., Paid/Unpaid), the total Amount, and the Invoice Date.
- **Subscriber (Contact) Page Layout** → Show the customer's contact details, their primary shipping address, and a related list to display all of their historical Subscriptions.
- **Shipment Page Layout** → Show the fulfillment Status (e.g., Shipped/Delivered), the Tracking Number, and a link to the paid Invoice.

SETUP > OBJECT MANAGER

Subscription

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Subscription Compact Layout
New Layout
[← Back to Subscriptions](#)

Help for this Page

Compact Layout Detail		Edit	Clone	Delete	Compact Layout Assignment
Label	New Layout				Object Name
API Name	New_Layout				Subscription
Included Fields	Subscription ID Subscription Next Billing Date Cancellation Date Currency Status Subscription Plans Start Date				
Created By	Akshat Sharma	9/19/2025, 9:46 PM	Modified By		
		Edit	Clone	Delete	Compact Layout Assignment

SETUP > OBJECT MANAGER

Invoice

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Invoice Compact Layout
New Layout
[← Back to Invoices](#)

Help for this Page

Compact Layout Detail		Edit	Clone	Delete	Compact Layout Assignment
Label	New Layout				Object Name
API Name	New_Layout				Invoice
Included Fields	Amount Invoice__c Name Currency Invoice Date Status Subscription				
Created By	Akshat Sharma	9/19/2025, 10:10 PM	Modified By		
		Edit	Clone	Delete	Compact Layout Assignment

SETUP > OBJECT MANAGER

Product Inventory

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Product Inventory Compact Layout
New Layout
[← Back to Product Inventory](#)

Help for this Page

Compact Layout Detail		Edit	Clone	Delete	Compact Layout Assignment
Label	New Layout				Object Name
API Name	New_Layout				Product Inventory
Included Fields	Product Inventory Name Product Quantity In Stock Currency Re-Order Threshold Stock Keeping Unit				
Created By	Akshat Sharma	9/19/2025, 10:12 PM	Modified By		
		Edit	Clone	Delete	Compact Layout Assignment

Product Inventory Compact Layout: New Layout - Salesforce - Developer Edition

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SETUP > OBJECT MANAGER

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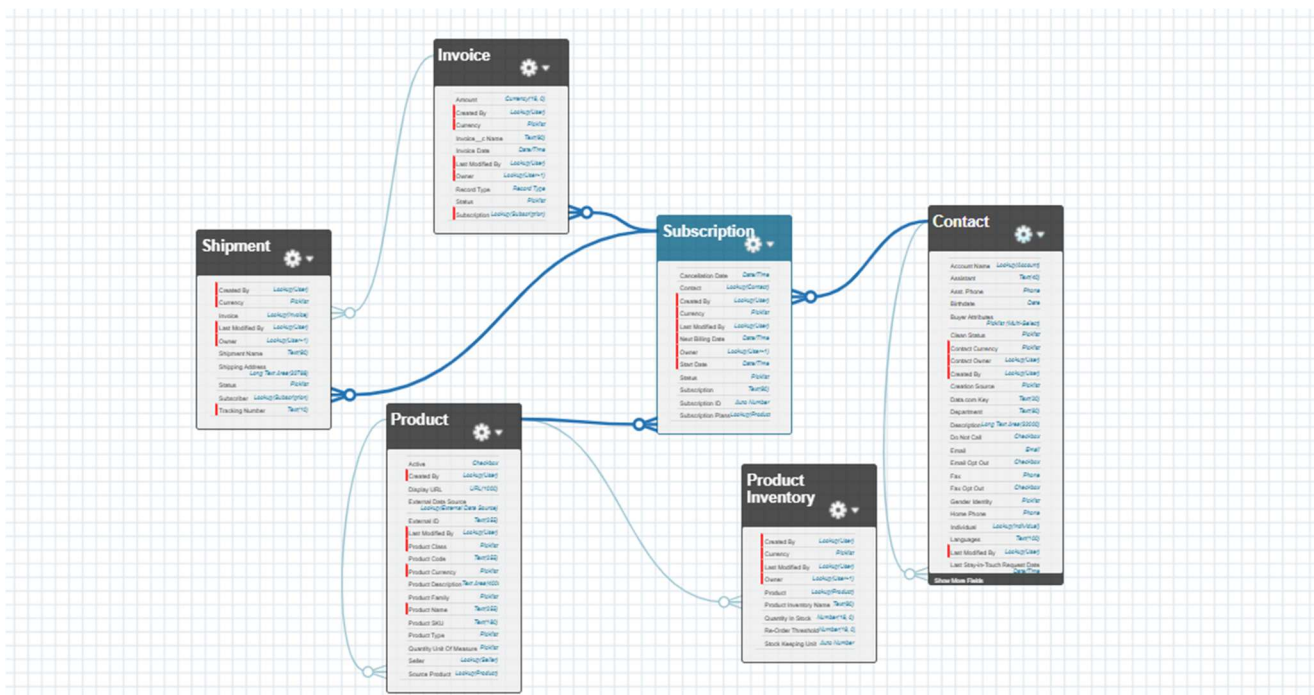
[Help for this Page](#)

Shipment Compact Layout
New Layout
[Back to Shipment](#)

Compact Layout Detail		Object Name
Label	New Layout	<u>Shipment</u>
API Name	New_Layout	
Included Fields	Shipment.Name Status Subscriber Tracking Number Invoice Currency	
Created by	Akshat Sharma, 9/19/2025, 10:14 PM	
Modified by	Akshat Sharma, 9/19/2025, 10:14 PM	

- **Schema Builder**

- **Customer Transaction Flow:** Contact (Subscriber) → Subscription → Invoice → Shipment
- **Product & Inventory Flow:** Product (Catalog) → Subscription Plan Product (Catalog) → Product Inventory Product (Catalog) → Invoice Line Item → Invoice



Subscripify :- Subscription Box Service Management System

- **Relationships**

- **Contact (Subscriber) → Subscription:** One subscriber can have multiple subscriptions over their lifetime. (**Lookup**)
- **Subscription → Invoice:** One subscription will generate many invoices over its lifetime. (**Lookup**)
- **Product (Subscription Plan) → Subscription:** One subscription plan (e.g., "Premium Box") can be associated with many different subscriptions. (**Lookup**)
- **Invoice → Invoice Line Item:** One invoice can be made up of multiple line items detailing each charge. (**Master-Detail**)
- **Invoice → Shipment:** One paid invoice results in one shipment to the customer. (**Lookup**)

- **Rationale**

- The separation of **Subscription**, **Invoice**, and **Shipment** objects creates a clear, scalable process. This design accurately models the real-world lifecycle of a subscription and ensures that billing data and fulfillment data are kept distinct and organized.
- Setting the Org-Wide Default for Subscription__c and Invoice__c to **Private** is a critical security decision. It protects sensitive customer and financial data at the most fundamental level, ensuring a trustworthy and secure platform.
- The use of **Scheduled Apex** for the monthly billing engine is the architectural cornerstone of the project. This ensures the entire revenue generation process is automated and scalable, allowing the business to grow without being limited by manual work.