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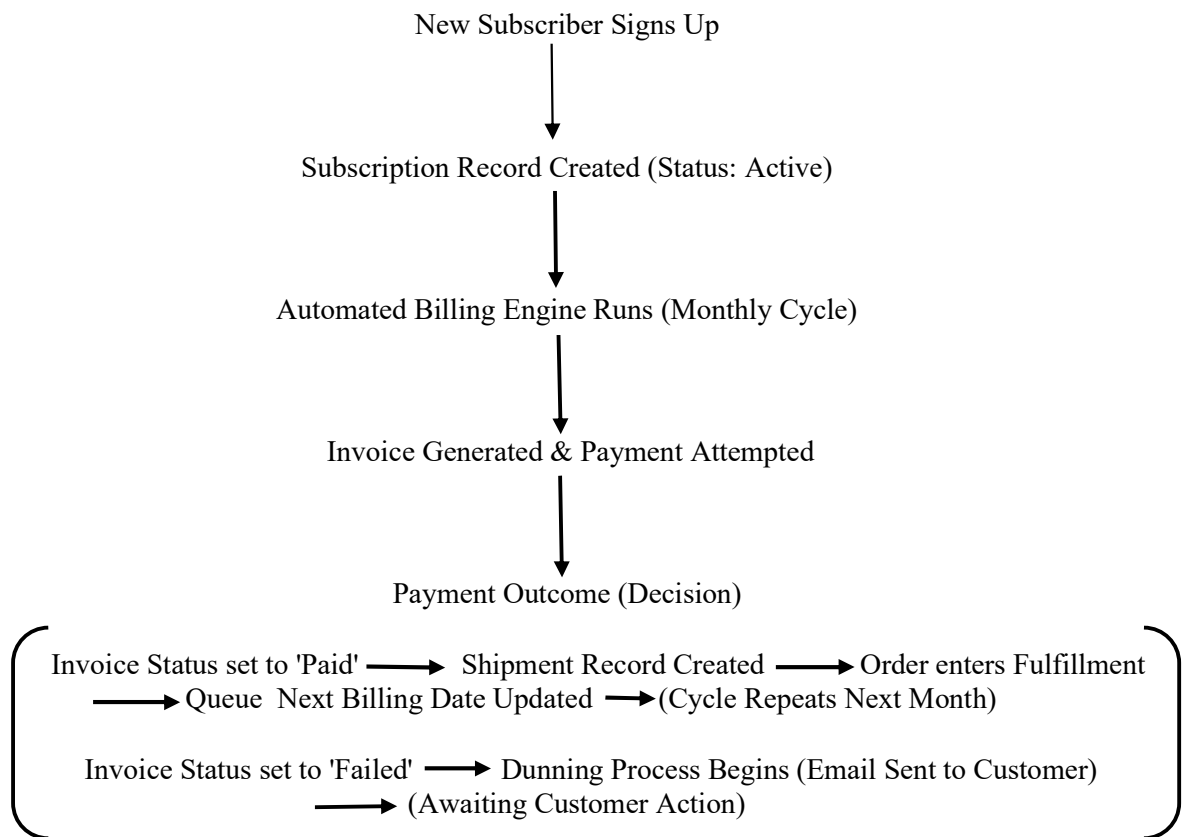
Finance Manager: Monitors revenue reports, tracks failed payments, and manages refund approvals.

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.

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Business Flow Mapping: -

New Subscriber Signs Up

$\downarrow$

Subscription Record Created (Status: Active)

$\downarrow$

Automated Billing Engine Runs (Monthly Cycle)

$\downarrow$

Invoice Generated & Payment Attempted

$\downarrow$

Payment Outcome (Decision)

Invoice Status set to 'Paid' $\longrightarrow$ Shipment Record Created $\longrightarrow$ Order enters Fulfillment
$\longrightarrow$ Queue Next Billing Date Updated $\longrightarrow$ (Cycle Repeats Next Month)

Invoice Status set to 'Failed' $\longrightarrow$ Dunning Process Begins (Email Sent to Customer)
$\longrightarrow$ (Awaiting Customer Action)

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.

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Phase-2 (Org Setup & Configuration)

- **Salesforce Edition**: - Salesforce Developer Editon Org

Company Profile Setup

- **Company Name:** Subscripify
- **Default Currency:** INR
- **Secondary Currency :** USD
- **Locale & Language:** India (English)
- **Time Zone:** Asia/Kolkata (GMT+5:30)
- **Fiscal Year :** 1st April- 31st March

Organization Detail   [Edit]

Organization Name	Subscripify	Phone	+91 12345
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	1,Ring Road,Sadar,Jabalpur (M.P) Jabalpur 482005 Madhya Pradesh India	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (India) - INR
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✔	Used File Space	17 KB (0%) [View]
Admin Newsletter	✔	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL00000BT5OJ
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 9/12/2025, 3:00 AM	Modified By	Akshat Sharma, 9/15/2025, 7:16 PM

Business Hours & Holidays
- **Business Hours**: 10:00 AM – 5:00 PM (Monday – Saturday).
- **Holidays**: Sunday holiday, Festive Holiday.

Fiscal Year Settings
- Using the Custom Fiscal Year (1st April – 31st March).
- Ensures finances can be reported on a yearly basis and can be managed.

User Setup & Licenses
- **Subscription Admin** – Manages the day-to-day operations and strategy of the subscription service
- **Fulfilment User** – It only has read-only access to orders so they can manage inventory and process shipments, with no access to financial data.

All Users   Help for this Page ⓧ

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: [All Users ▾] Edit | Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

[New User] [Reset Password(s)] [Add Multiple Users]

	Action	Full Name ↑	Alias	Username	Role	Active	Profile
☐	Edit	Chatter Expert	Chatter	chatty.00dgl00000bt5ojua1.4kfnb4lonagd@chatter.salesforce.com		✔	Chatter Free User
☐	Edit	EPIC, OrgFarm	OEPIC	epic.e09780ec1759@orgfarm.salesforce.com		✔	System Administrator
☐	Edit	Sharma, Akshat	aks	akshatleader4174@agentforce.com		✔	System Administrator
☐	Edit	Singh, Rohan	subs	rohan@subscripify.in		✔	Subscription Admin
☐	Edit	User, Integration	integ	integration@00dgl00000bt5ojua1.com		✔	Analytics Cloud Integration User
☐	Edit	User, Security	sec	insightssecurity@00dgl00000bt5ojua1.com		✔	Analytics Cloud Security User
☐	Edit	Verma, Aakash	rverma	aakash@subscripify.in		✔	Fulfilment User

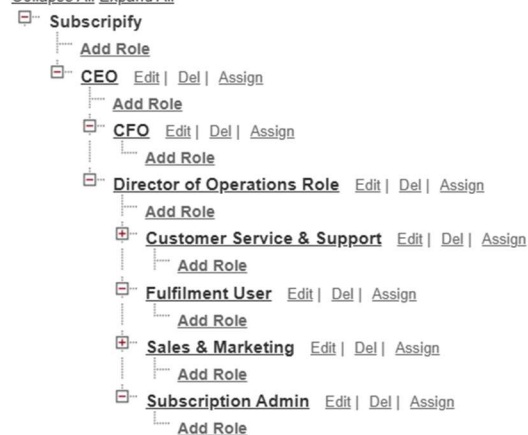[New User] [Reset Password(s)] [Add Multiple Users]

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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

- **Subscripify**
  - Add Role
  - **CEO**   Edit | Del | Assign
    - Add Role
    - **CFO**   Edit | Del | Assign
      - Add Role
      - **Director of Operations Role**   Edit | Del | Assign
        - Add Role
        - **Customer Service & Support**   Edit | Del | Assign
          - Add Role
        - **Fulfilment User**   Edit | Del | Assign
          - Add Role
        - **Sales & Marketing**   Edit | Del | Assign
          - Add Role
        - **Subscription Admin**   Edit | Del | Assign
          - Add Role

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 Fulfilment 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.