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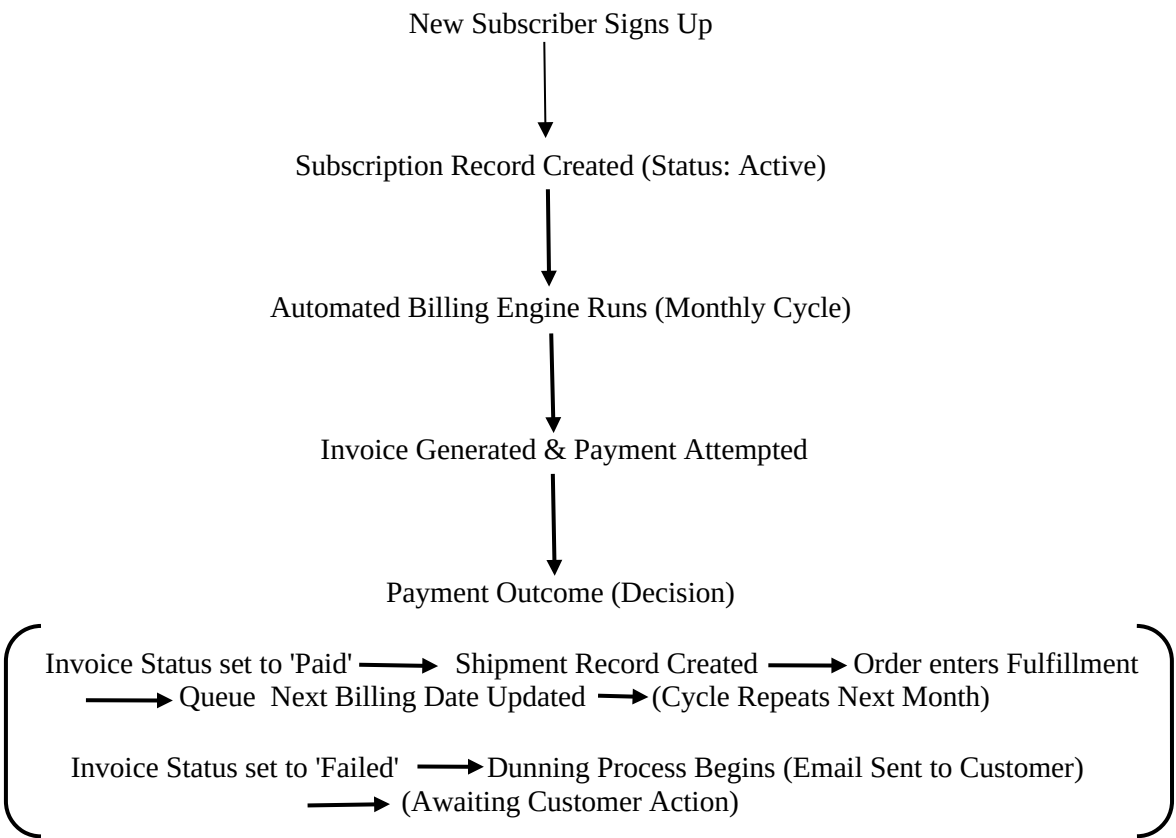
Finance Manager: Monitors revenue reports, tracks failed payments, and manages refund approvals.

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: -

New Subscriber Signs Up

↓

Subscription Record Created (Status: Active)

↓

Automated Billing Engine Runs (Monthly Cycle)

↓

Invoice Generated & Payment Attempted

↓

Payment Outcome (Decision)

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

Invoice Status set to 'Failed' ⟶ Dunning Process Begins (Email Sent to Customer) ⟶ (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.

Subscripify :- Subscription Box Service Management System
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

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.

Profiles

Subscripify :- Subscription Box Service Management System

- **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
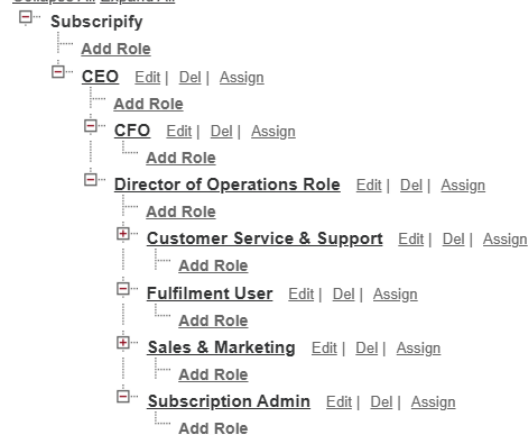
Roles

- **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.

Subscripify :- Subscription Box Service Management System

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.

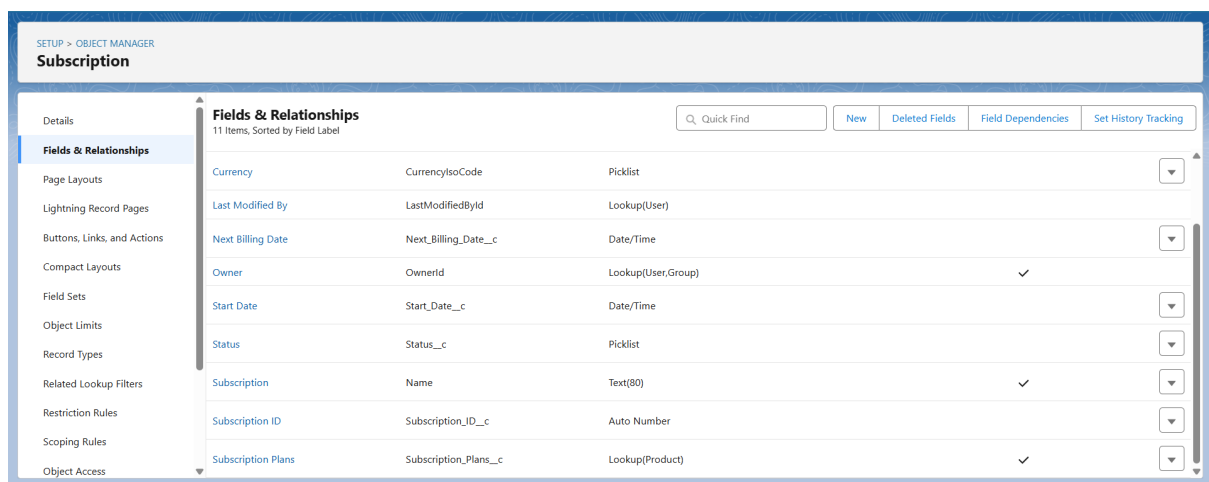# Subscripify :- Subscription Box Service Management System
Phase 3: Data Modelling & Relationships

- **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

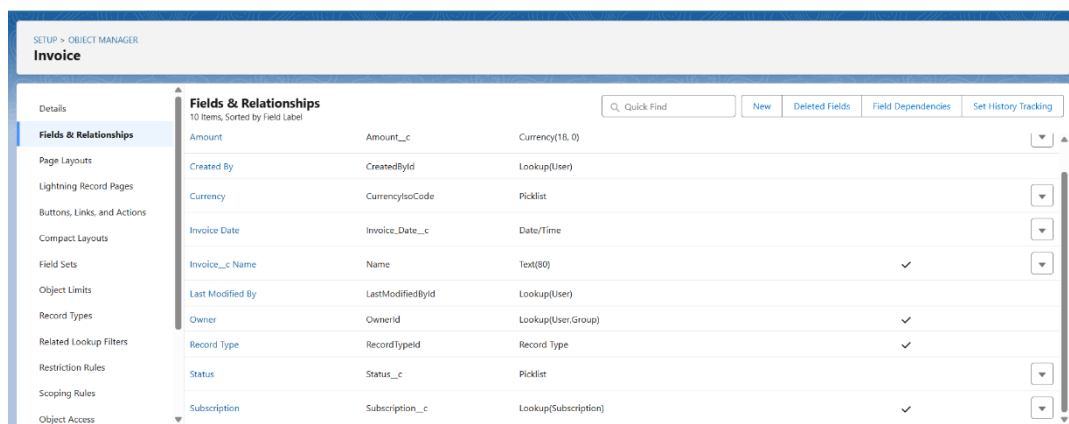|	Fields & Relationships 11 Items, Sorted by Field Label			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Details								
Fields & Relationships	Currency	CurrencyIsoCode	Picklist					▼
Page Layouts	Last Modified By	LastModifiedById	Lookup(User)					
Lightning Record Pages	Next Billing Date	Next_Billing_Date__c	Date/Time					▼
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓			
Compact Layouts	Start Date	Start_Date__c	Date/Time					▼
Field Sets	Status	Status__c	Picklist					▼
Object Limits	Subscription	Name	Text(80)		✓			▼
Record Types	Subscription ID	Subscription_ID__c	Auto Number					▼
Related Lookup Filters	Subscription Plans	Subscription_Plans__c	Lookup(Product)		✓			▼
Restriction Rules								
Scoping Rules								
Object Access								

- ### 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)

SETUP > OBJECT MANAGER
Invoice

	Fields & Relationships 10 Items, Sorted by Field Label			Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
Details								
Fields & Relationships	Amount	Amount__c	Currency(18, 0)					▼
Page Layouts	Created By	CreatedById	Lookup(User)					
Lightning Record Pages	Currency	CurrencyIsoCode	Picklist					▼
Buttons, Links, and Actions	Invoice Date	Invoice_Date__c	Date/Time					▼
Compact Layouts	Invoice__c Name	Name	Text(80)		✓			▼
Field Sets	Last Modified By	LastModifiedById	Lookup(User)					
Object Limits	Owner	OwnerId	Lookup(User,Group)		✓			
Record Types	Record Type	RecordTypeId	Record Type		✓			
Related Lookup Filters	Status	Status__c	Picklist					▼
Restriction Rules	Subscription	Subscription__c	Lookup(Subscription)		✓			▼
Scoping Rules								
Object Access								

Subscripify :- Subscription Box Service Management System

3. Product Inventory (Product_Inventory__c)

Fields:

- Product (Lookup → Product2)

- SKU (Text)

- Quantity In Stock (Number)

- Re-Order Threshold (Number)

- Warehouse Location (Text)

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)

Subscripify :- Subscription Box Service Management System

- **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.

- **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
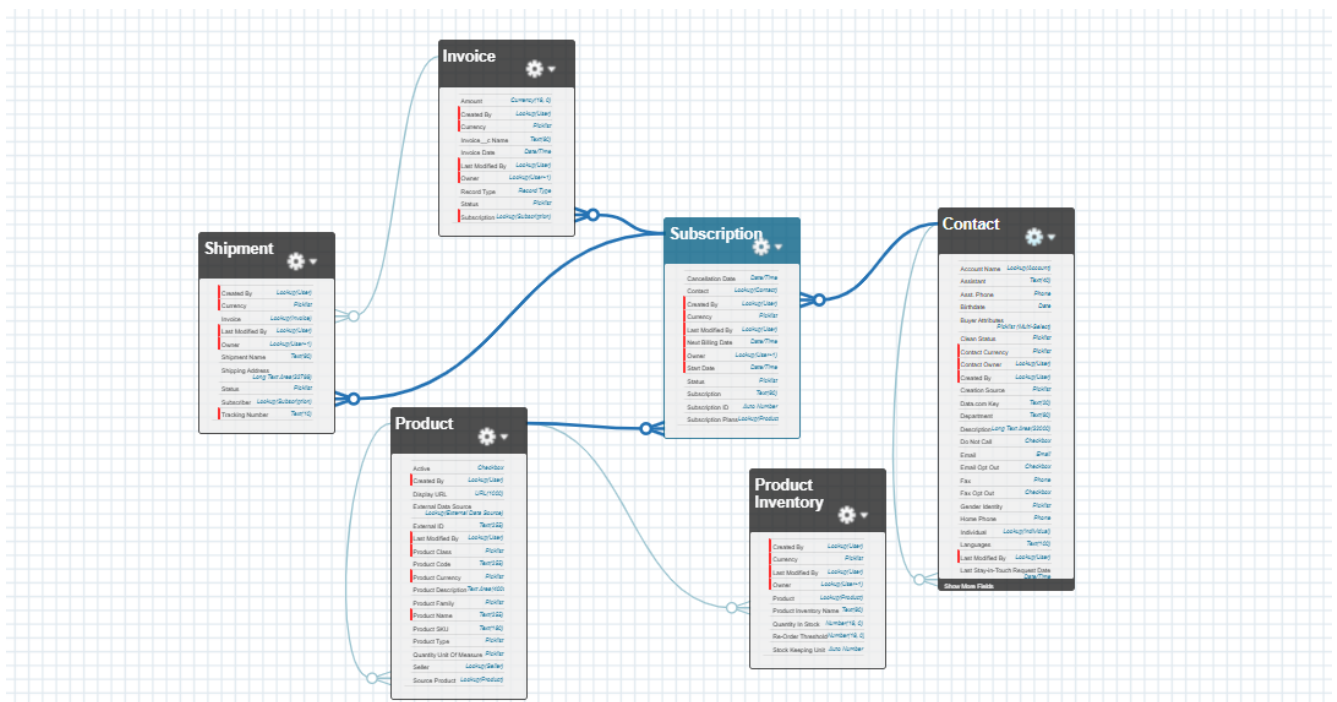
Subscripify :- Subscription Box Service Management System

- **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.s

Subscripify :- Subscription Box Service Management System

Phase 4: Process Automation (Admin)

- **Validation Rules**

  - **Subscription**

    The rule checks the Start_Date__c and Cancellation_Date__c fields. If a user tries to save a record where the cancellation date is earlier than the start date, the system blocks the save and shows an error.

Subscription Validation Rule
Back to Subscription

Validation Rule Detail [Edit] [Clone]

Rule Name	Cancellation_Date	Active	✓
Error Condition Formula	Cancellation_Date__c < Start_Date__c		
Error Message	The cancellation date cannot be before the subscription start date.	Error Location	Top of Page
Description			
Created By	Akshat Sharma, 9/21/2025, 1:44 AM	Modified By	Akshat Sharma, 9/21/2025, 1:44 AM

[Edit] [Clone]

  - **Product Inventory**

    The rule checks the Quantity_In_Stock__c field every time the record is saved. If the number in that field is less than zero, the save action is blocked and an error message appears.

Product Inventory Validation Rule
Back to Product Inventory

Validation Rule Detail [Edit] [Clone]

Rule Name	Cannot_Be_Negative	Active	✓
Error Condition Formula	Quantity_In_Stock__c < 0		
Error Message	The quantity in stock cannot be a negative number.	Error Location	Top of Page
Description	The Product cannot go negative		
Created By	Akshat Sharma, 9/21/2025, 2:04 AM	Modified By	Akshat Sharma, 9/21/2025, 2:04 AM

[Edit] [Clone]

  - **Invoice**
    The rule activates when a user tries to edit an invoice. It checks if the invoice's Status was already 'Paid' *before* the current edit. If it was, and the user is trying to change a key field like Amount__c, the rule stops the save.

Subscripify :- Subscription Box Service Management System

Invoice Validation Rule
Back to Invoice

Validation Rule Detail [Edit] [Clone]

Rule Name	Cannot_Edit_Paid_Invoice_Amount	Active	✓
Error Condition Formula	AND(ISCHANGED(Amount__c), ISPICKVAL(PRIORVALUE(Status__c), "Paid"))		
Error Message	The amount on a paid invoice cannot be modified and is restricted	Error Location	Top of Page
Description	Cannot Edit Paid Invoice Amount		
Created By	Akshat Sharma, 9/21/2025, 2:01 AM	Modified By	Akshat Sharma, 9/21/2025, 2:01 AM

[Edit] [Clone]

- **Shipment**

  When a user changes the Status picklist on a shipment to 'Shipped', the rule immediately checks if the Tracking_Number__c field is empty. If it is, the rule blocks the save and displays an error.

Shipment Validation Rule
Back to Shipment

Validation Rule Detail [Edit] [Clone]

Rule Name	Share_Tracking_ID	Active	✓
Error Condition Formula	AND(ISPICKVAL(Status__c, "Shipped"), ISBLANK(Tracking_Number__c))		
Error Message	Tracking Number Is Needed For Shipment	Error Location	Top of Page
Description	Share Tracking Id with the customer		
Created By	Akshat Sharma, 9/21/2025, 2:17 AM	Modified By	Akshat Sharma, 9/21/2025, 2:17 AM

[Edit] [Clone]

- ## Approval Process

  High-Value Refund Approval: An approval process is configured on the Invoice__c object. If a user tries to process a refund over a set amount (e.g., ₹500), the record is locked and automatically submitted to a manager for approval before any further action can be taken.

- ## Flow Builder

  - **Record-Triggered Flow: Automated Fulfillment Process**

    o **Trigger**: This flow automatically runs when an Invoice__c record's Status is updated to 'Paid'.

    o **Actions**: It creates a new Shipment__c record, performs Field Updates to populate the shipment details, sends an Email Alert to the customer, and sends a Custom Notification to the fulfillment team.

  - **Scheduled Flow**: A simple flow that runs daily to send an email alert for any high-value Invoice__c that is 5 days overdue.

Subscripify :- Subscription Box Service Management System

Flow Builder — Invoice - Automated Fulfillment Process - V1

Select Elements — Auto-Layout

Invoice - Automated Fulfillment Process - V1

Last saved on 9/24/2025, 11:55 AM — Active — Run — Debug — View Tests — Save As New Version — Save — Deactivate

Record-Triggered Flow
Start

Object: Invoice — Edit
Trigger: A record is created
Conditions: 2
Optimize for: Actions and Related Reco...

+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Invoice

Run Immediately

Create Shipment Record
Create Records

Add Owner ID to Collection
Assignment

Notify Fulfillment Team
Action

End

Flow Builder — Due Payments - V1

Select Elements — Auto-Layout

Last saved on 9/24/2025, 12:17 PM — Active — Run — Debug — Save As New Version — Save — Deactivate

Tue, Sep 23, 2025, 10:45:00 AM, Daily
Start

Flow Starts: Tue, Sep 23, 2025, 1… — Edit
Frequency: Daily

Object: Invoice — Edit
Conditions: 3

Create Follow-up Task
Create Records

End