

Phase 4: Process Automation

Goal: Automate tasks for Membership & Subscription Manager.

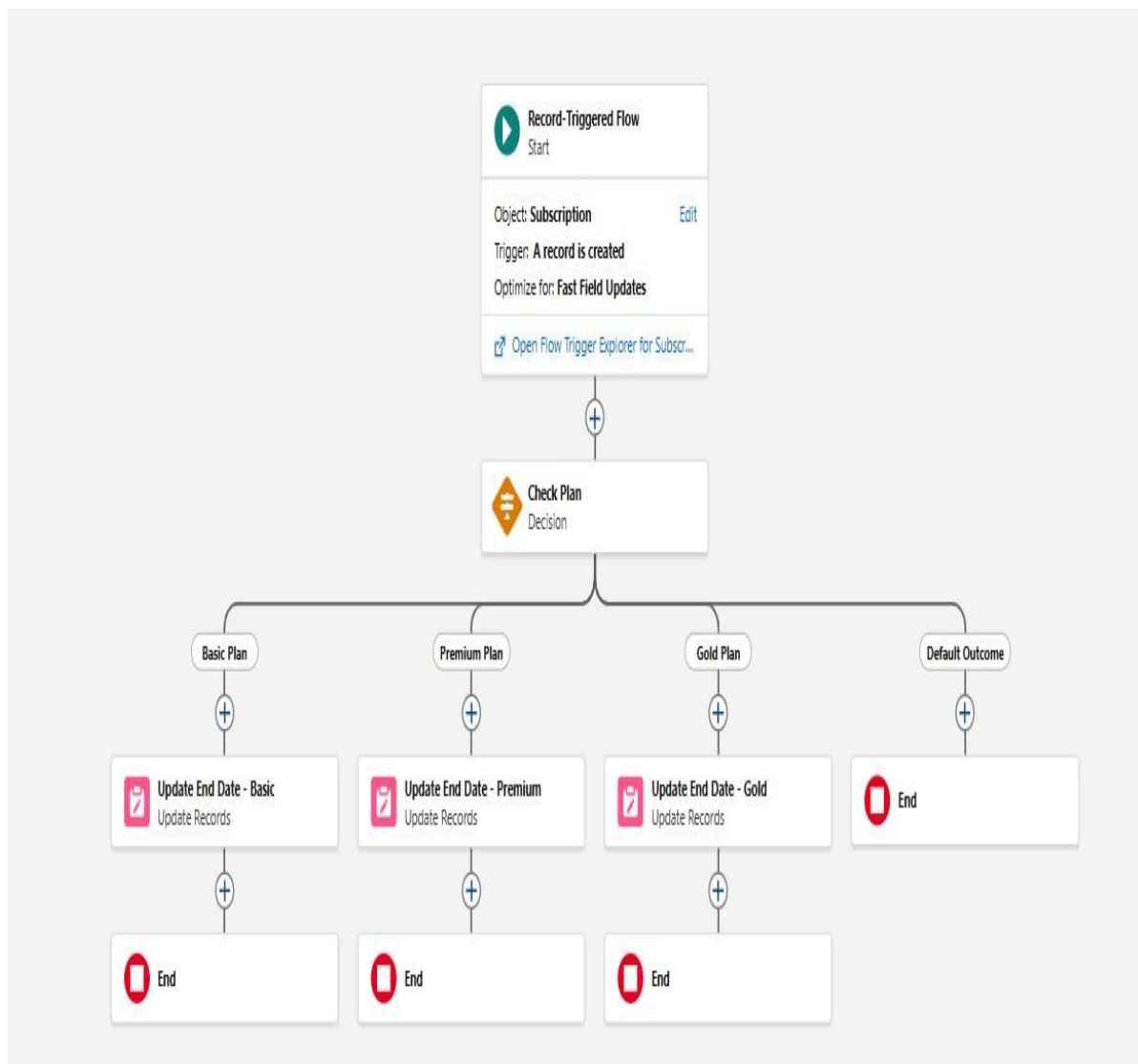
Validation Rules:

- End Date must be after Start Date.
- Subscription cannot be created without Start Date.

Flows:

1. Auto Set End Date

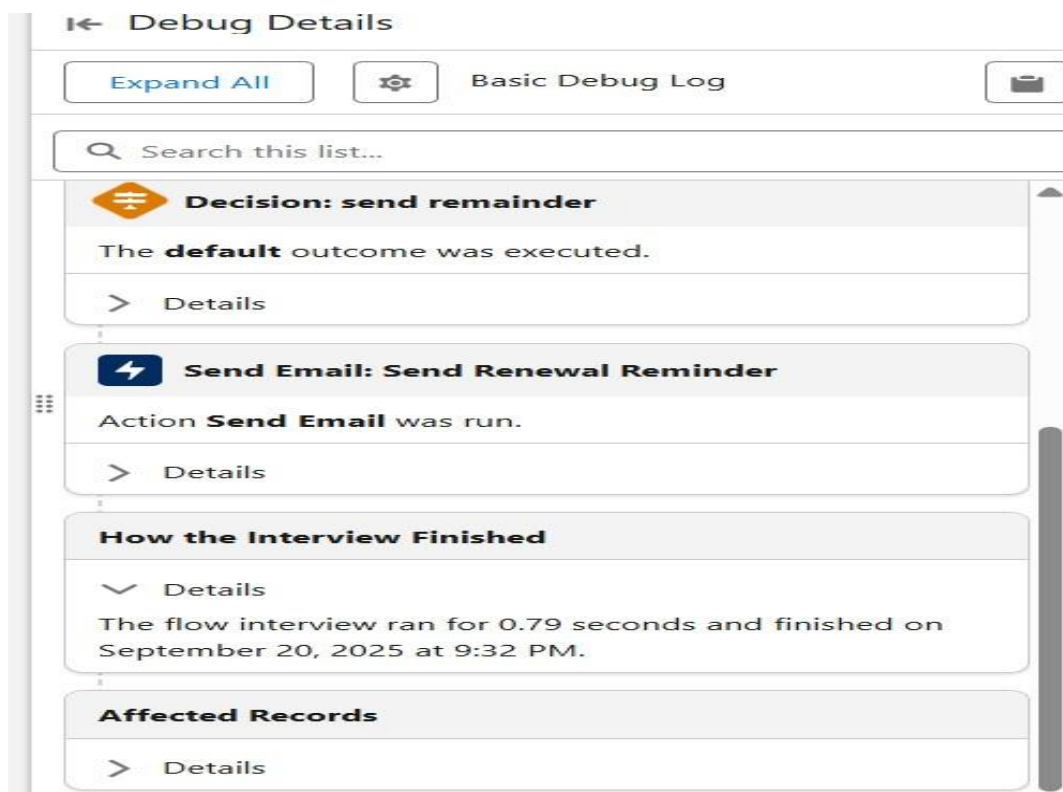
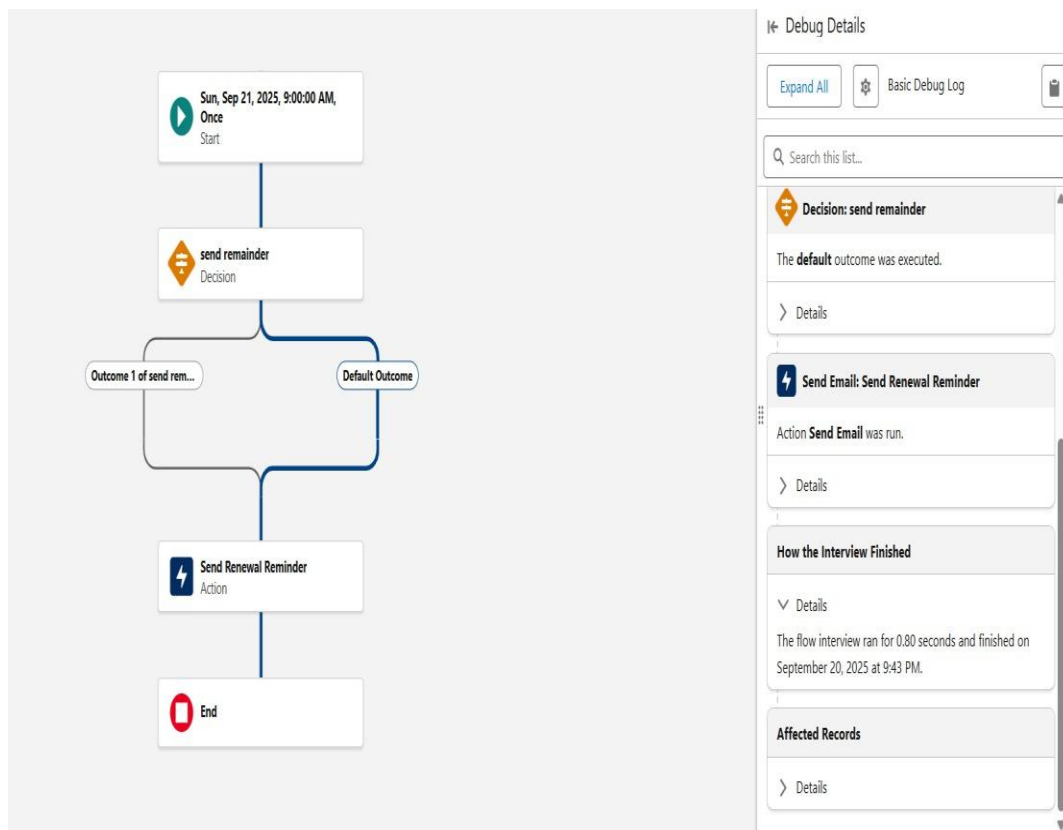
- Record-Triggered Flow on Subscription creation.
- If Plan = Basic → End Date = Start + 30 days.
- If Plan = Premium → End Date = Start + 90 days. - If Plan = Gold → End Date = Start + 365 days.



2. Renewal Reminder Email -

Scheduled Flow (daily at 9 AM).

- Finds Subscriptions expiring in 7 days. -
- Sends email reminder to Member.



3. Auto Expire Subscription

- Record-Triggered Flow on Subscription update. If Today > End Date → Status = "Expired".

Email Alerts:

- Reminder Email sent 7 days before expiry using Text Template.

Approval Process (Optional):

- Subscriptions above a threshold can be routed for Manager Approval.

Extra Automations:

- Create a Task for Admin when a new subscription is created. In-app Notification for Agents after approval.

Conclusion:

Process automation ensures smooth handling of subscription lifecycles, from auto-calculating dates to sending reminders and updating statuses. This makes the system scalable, reliable, and suitable for real-world usage