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.
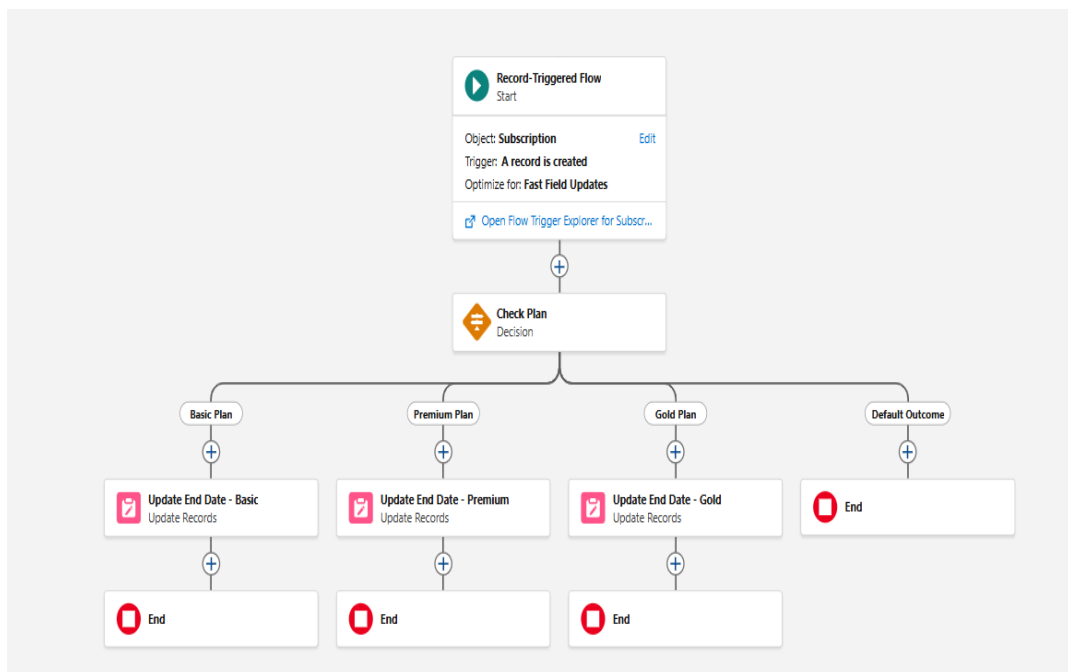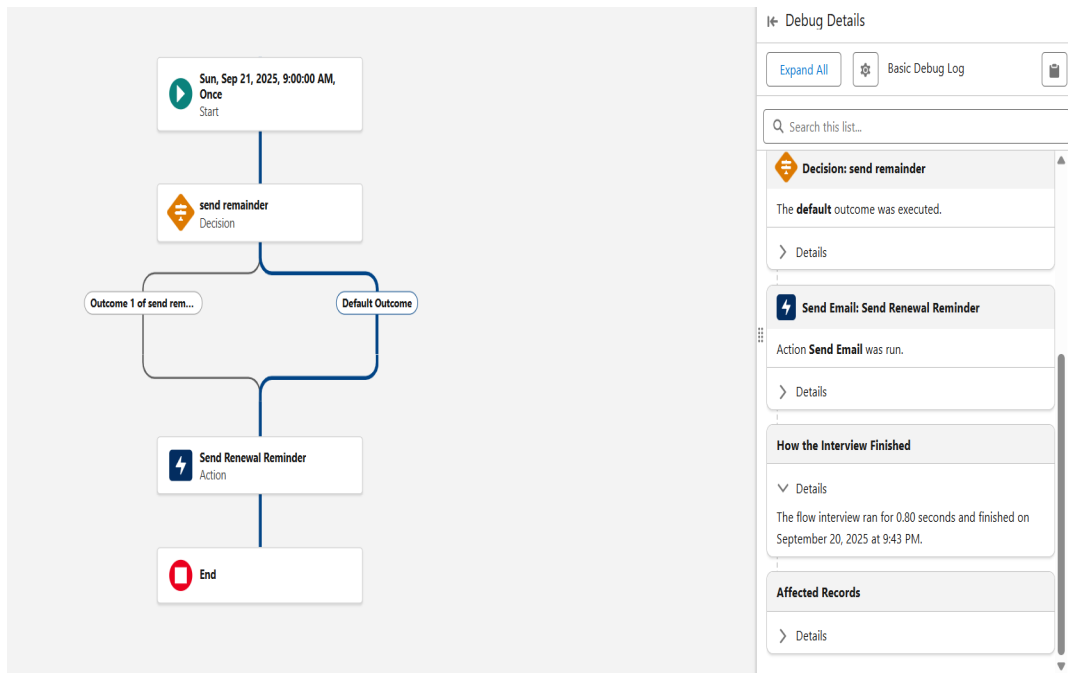
Approval Process (Optional):
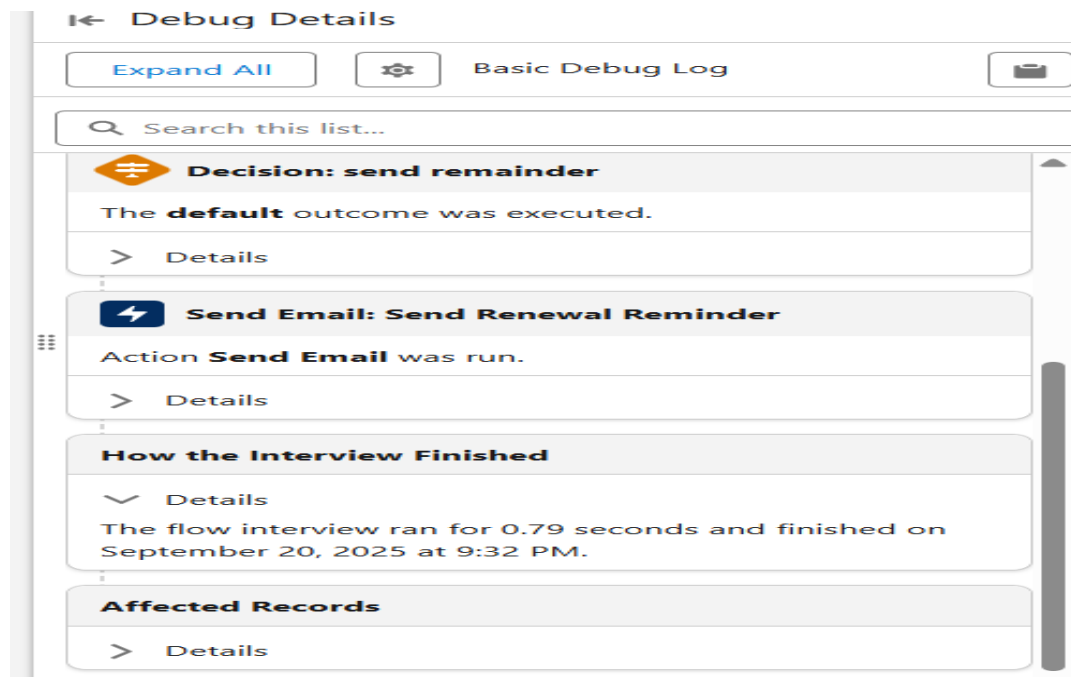- Subscriptions above a threshold can be routed for Manager Approval.

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

Screenshots:
Below are key flow automations implemented in Salesforce.

Flow Diagram 1

Sun, Sep 21, 2025, 9:00:00 AM, Once
Start

send remainder
Decision

Outcome 1 of send rem...   Default Outcome

Send Renewal Reminder
Action

End

Debug Details

Expand All   ⚙   Basic Debug Log   🗑

🔍 Search this list...

Decision: send remainder

The **default** outcome was executed.

> Details

Send Email: Send Renewal Reminder

Action **Send Email** was run.

> Details

How the Interview Finished

∨ Details

The flow interview ran for 0.80 seconds and finished on September 20, 2025 at 9:43 PM.

Affected Records

> Details

Flow Diagram 2

Record-Triggered Flow
Start

Object: **Subscription**   Edit
Trigger: **A record is created**
Optimize for: **Fast Field Updates**

🔗 Open Flow Trigger Explorer for Subscr...

⊕

Check Plan
Decision

Basic Plan   Premium Plan   Gold Plan   Default Outcome

⊕   ⊕   ⊕   ⊕

Update End Date - Basic   **Update End Date - Premium**   **Update End Date - Gold**   End
Update Records   Update Records   Update Records

⊕   ⊕   ⊕

End   End   End

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 interview-ready.