

## 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):**

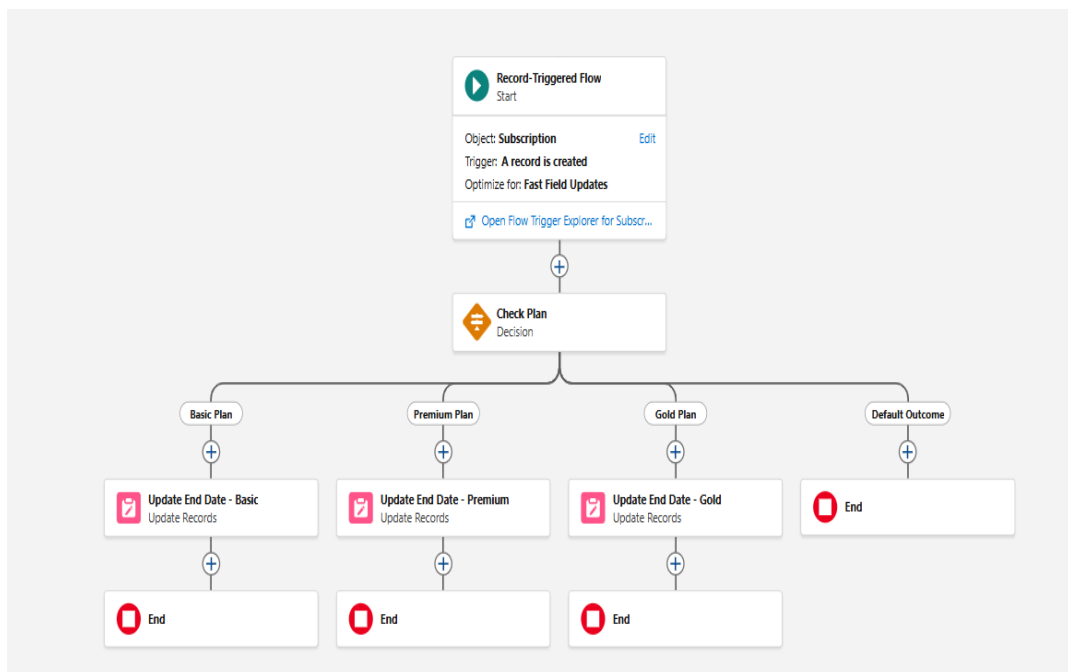
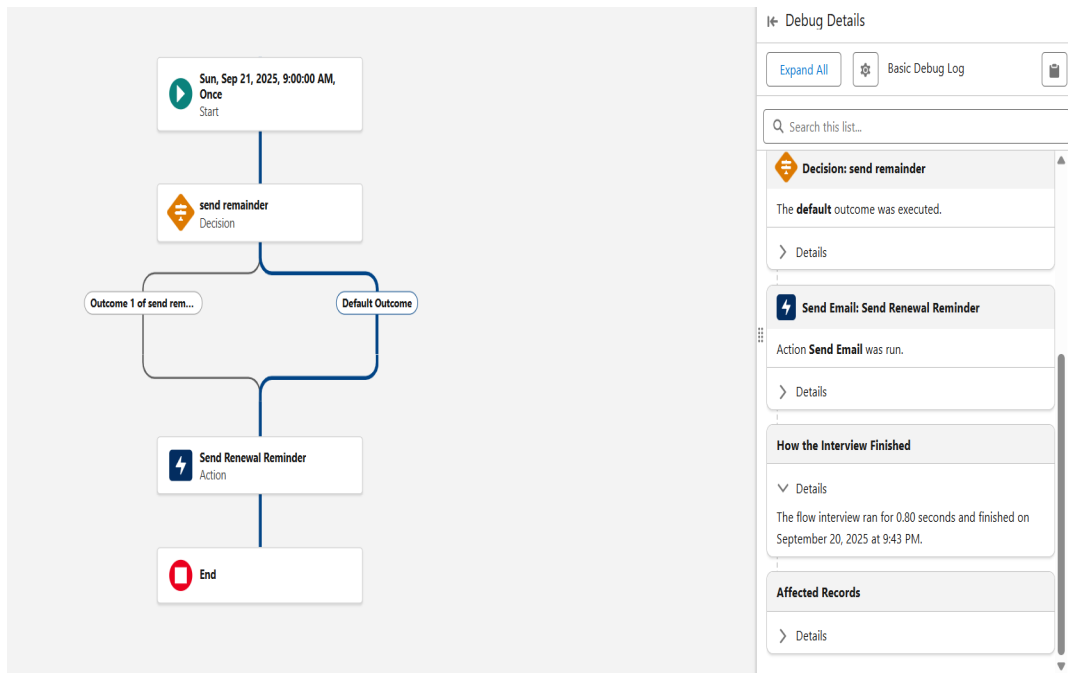
- Subscriptions above a threshold can be routed for Manager Approval.

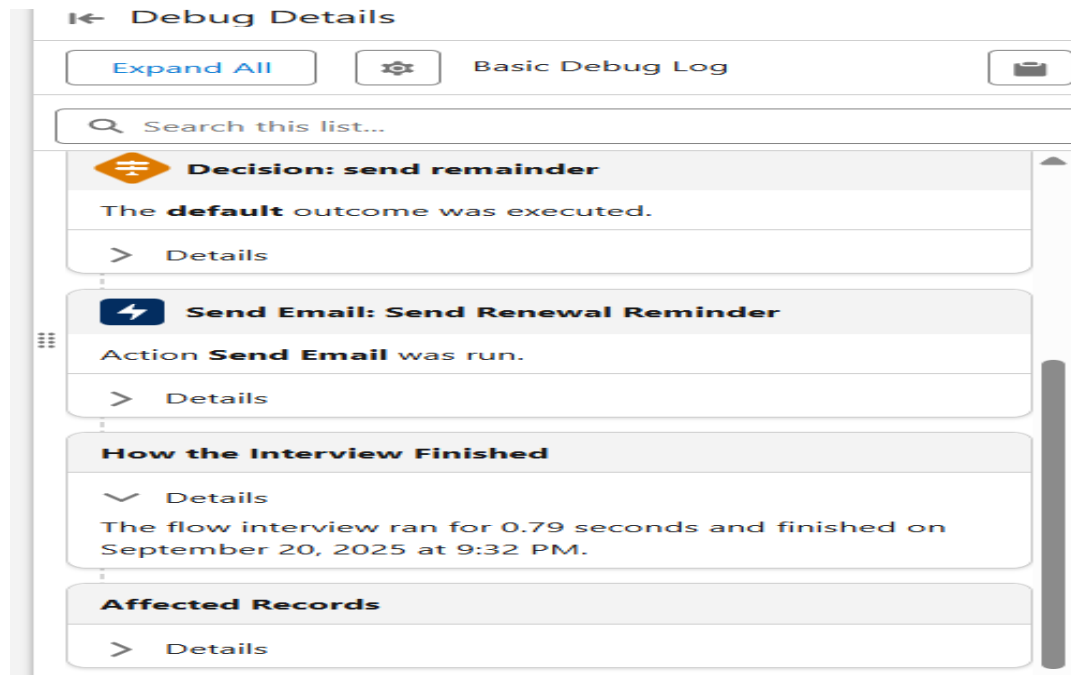
**Extra Automations:**

- 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.





**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.