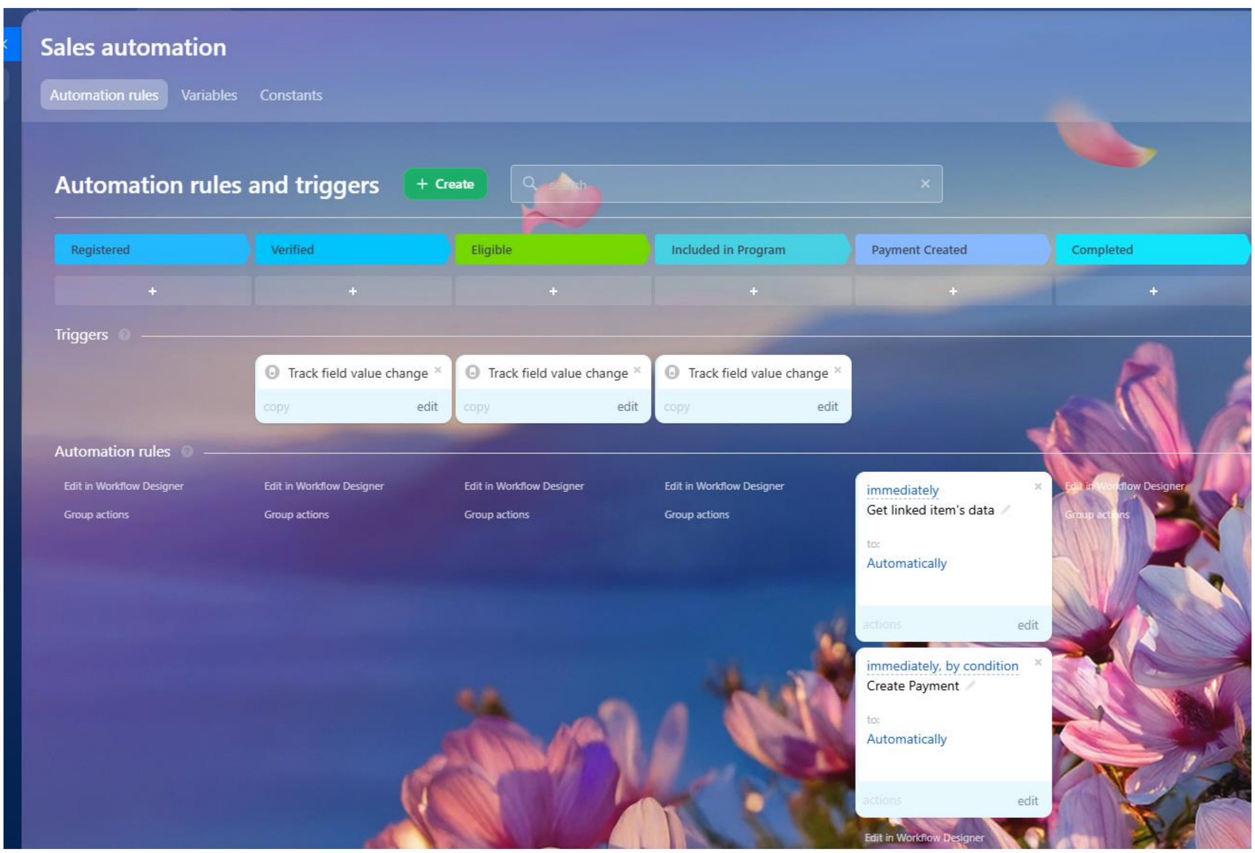
1. Automation Flow in Beneficiary Pipeline

The Beneficiary entity has multiple pipeline stages:

- **Registered**
- **Verified**
- **Eligible**
- **Included in Program**
- **Payment Created**
- **Completed**

Automation rules are tied to field conditions and stage changes to ensure only valid beneficiaries progress through the pipeline.



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2. Trigger: Verification Checks

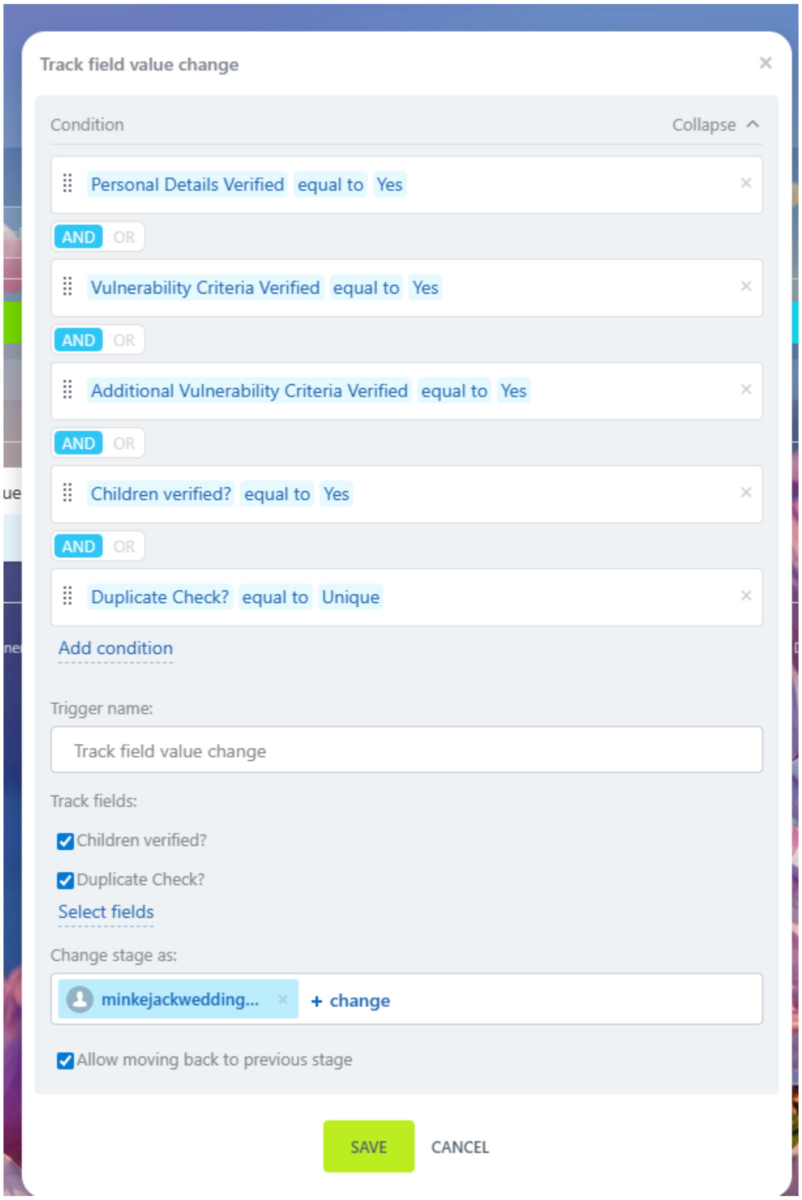
This trigger ensures a beneficiary moves to **Eligible** only if all required checks are satisfied.

Conditions:

- Personal Details Verified = Yes
- Vulnerability Criteria Verified = Yes
- Additional Vulnerability Criteria Verified = Yes
- Children verified = Yes
- Duplicate Check? = Unique

Fields tracked:

- Children verified?
- Duplicate Check?



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3. Trigger: Eligibility Check

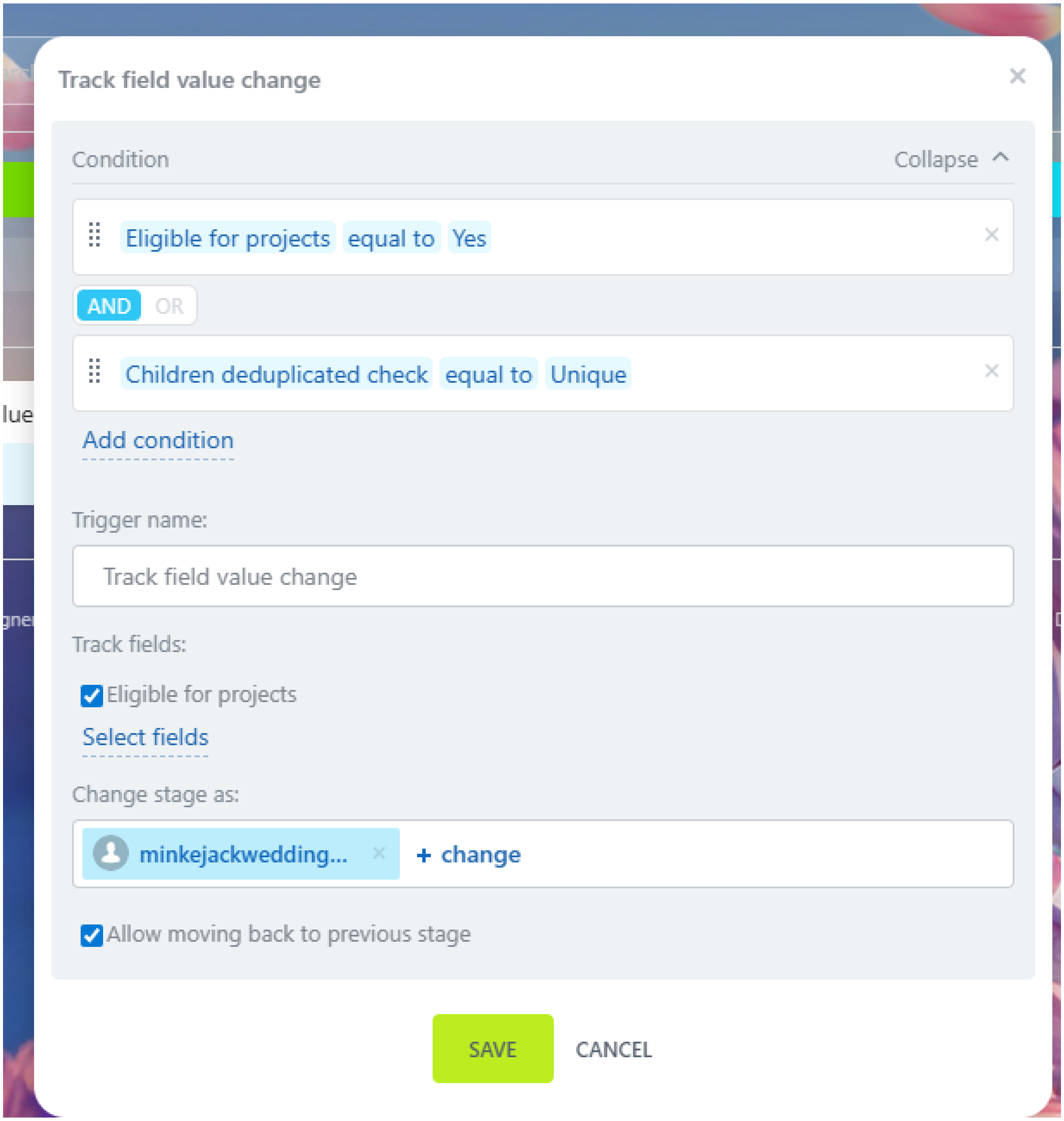
This trigger ensures that only beneficiaries marked as **Eligible** and with unique child records proceed further.

Conditions:

- Eligible for projects = Yes
- Children deduplicated check = Unique

Fields tracked:

- Eligible for projects



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4. Trigger: Project Assignment

When a beneficiary is linked to at least one project, and the current stage is not completed, the automation moves the record forward.

Conditions:

- Projects not empty

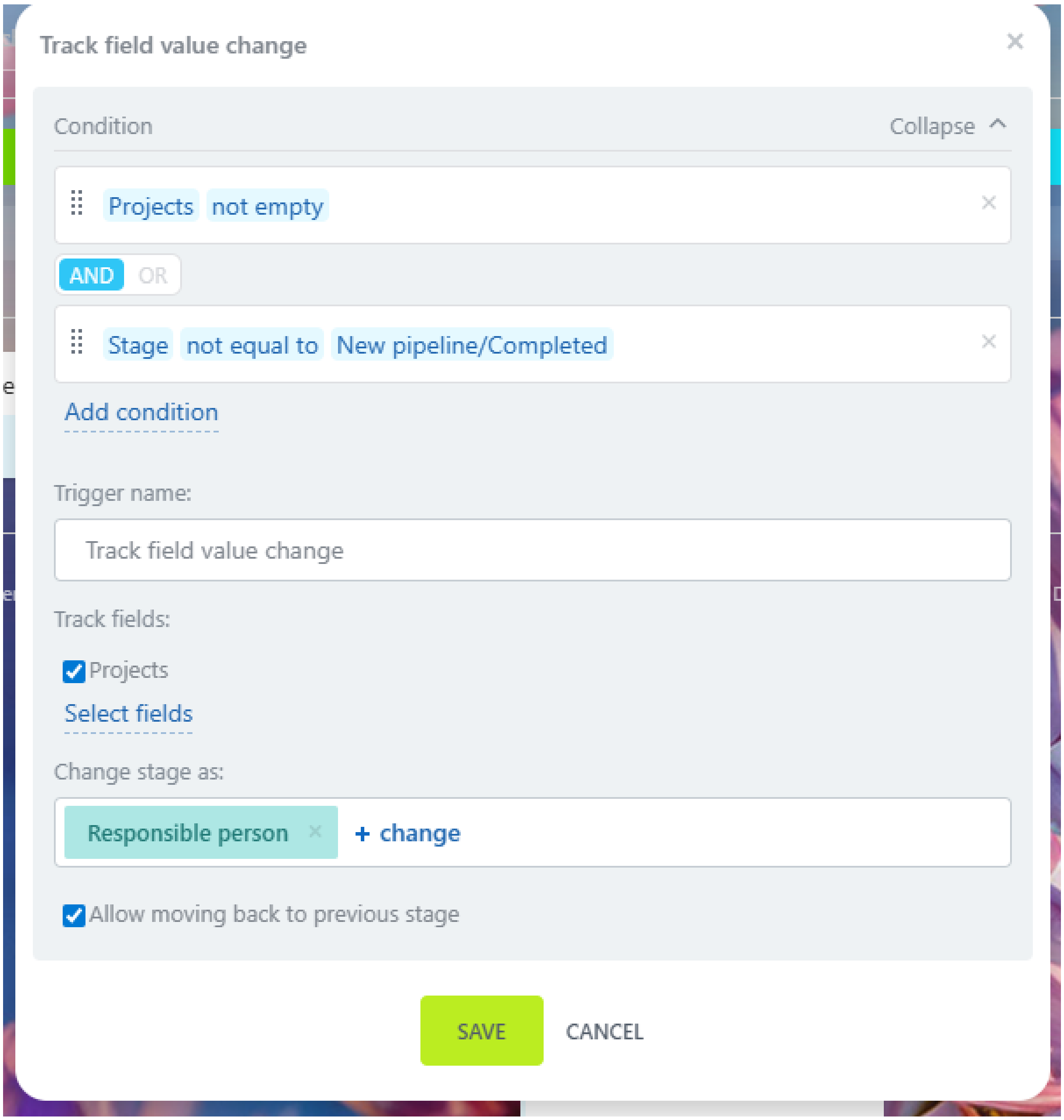
- Stage not equal to Completed

Tracked field:

- Projects

Action:

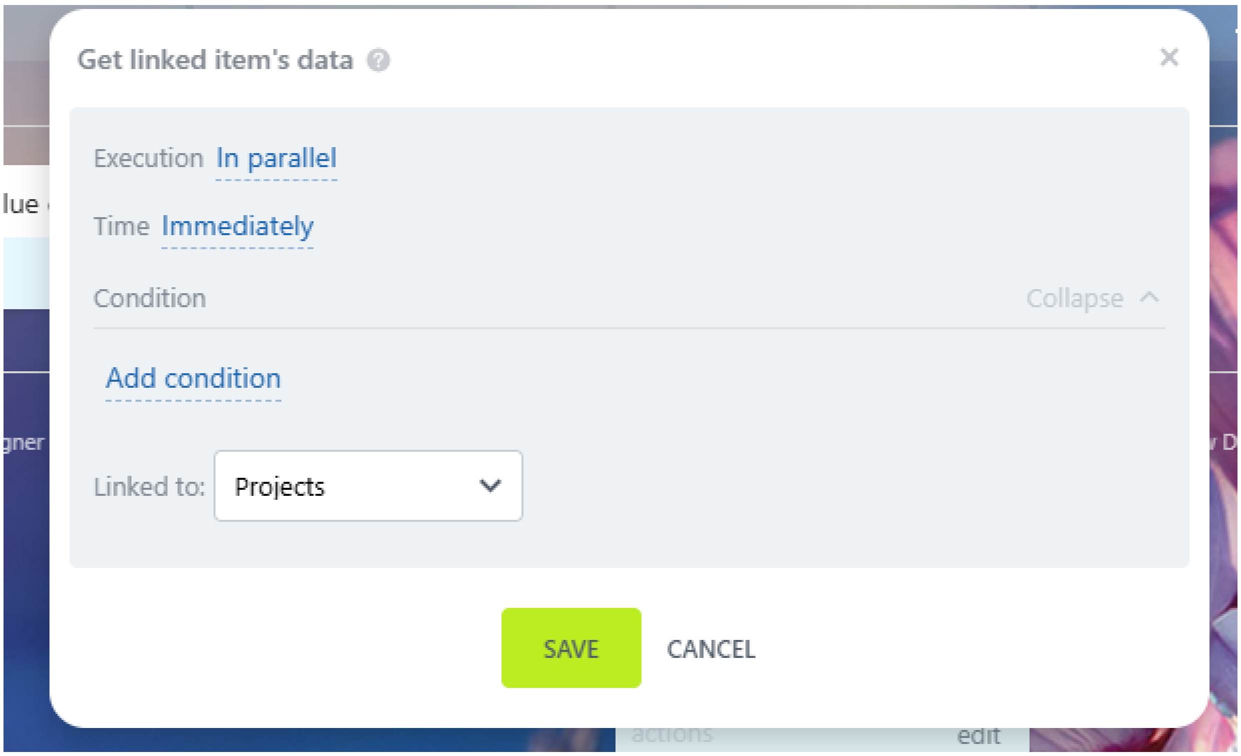
- Change stage → Responsible person review



5. Rule: Get Linked Project Data

When the beneficiary reaches the correct stage, linked **Project** details are fetched automatically for consistency.

Execution: Immediately
Linked to: Projects



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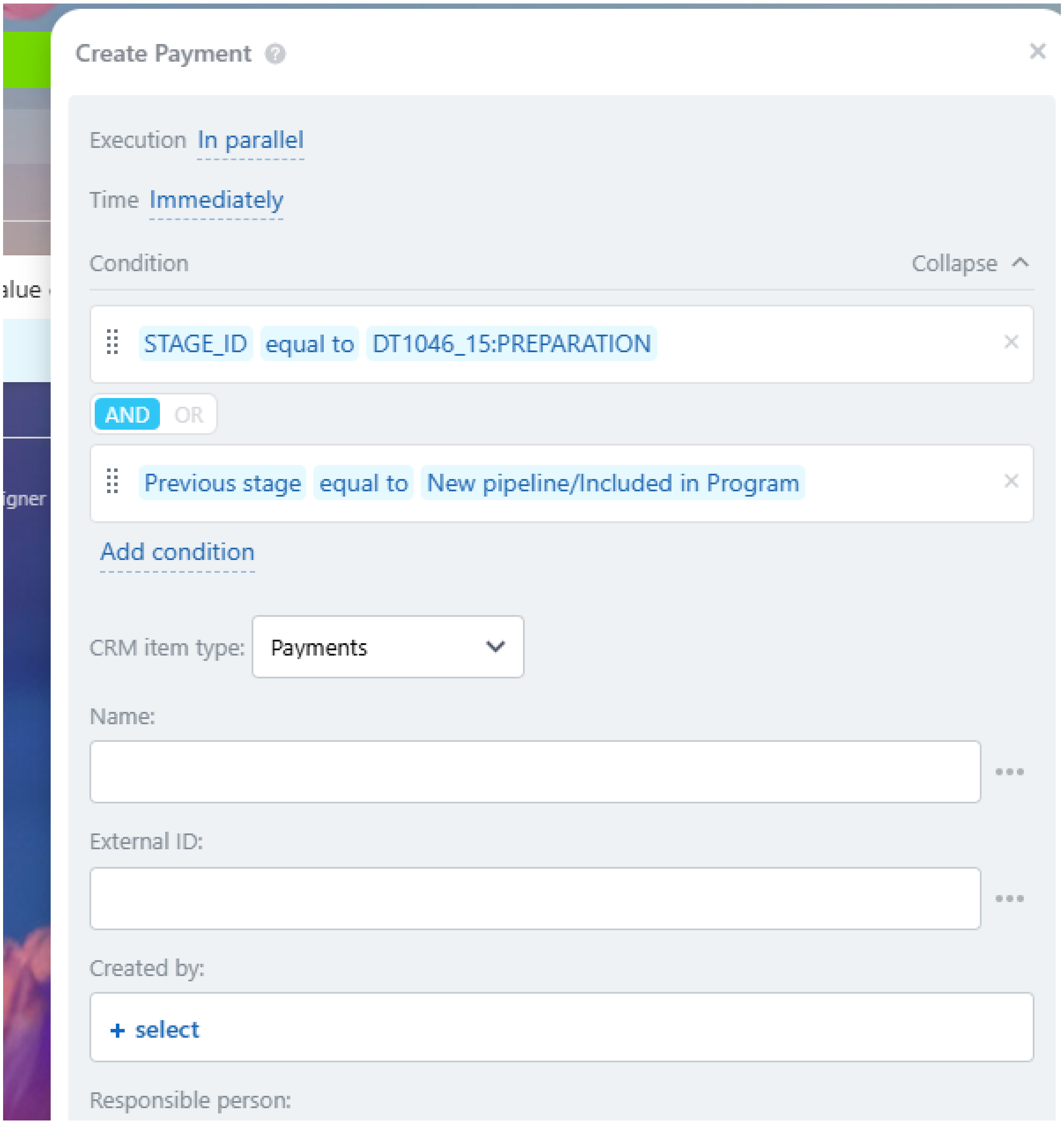
6. Rule: Automatic Payment Creation

If a beneficiary reaches the **Included in Program** stage, the system automatically generates a linked **Payment** record.

Conditions:

- Stage = Preparation
- Previous Stage = Included in Program

Action: Create new Payment item linked to the Beneficiary and Project.



7. Payment Record Mapping

When a payment is created, fields are pre-filled from the Beneficiary and Project data:

- First Name → {{First Name}}
- Surname → {{Last Name}}
- Patronymic → {{Patrynomic}}

- Payment Amount → Project: Payment Amount
- Payment Currency → Project: Currency
- ID Number → {{ID Number}}
- Region → {{Region (text)}}
- Project Name → {{Project Name}}

(Screenshot 7: Payment field mapping)

Summary

These automations ensure that:

- Only verified and eligible beneficiaries move forward.
- Duplicates are filtered out before inclusion in projects.
- Project details are automatically linked.
- Payment records are generated without manual intervention.

This setup enforces data integrity, reduces manual errors, and accelerates beneficiary support workflows.