

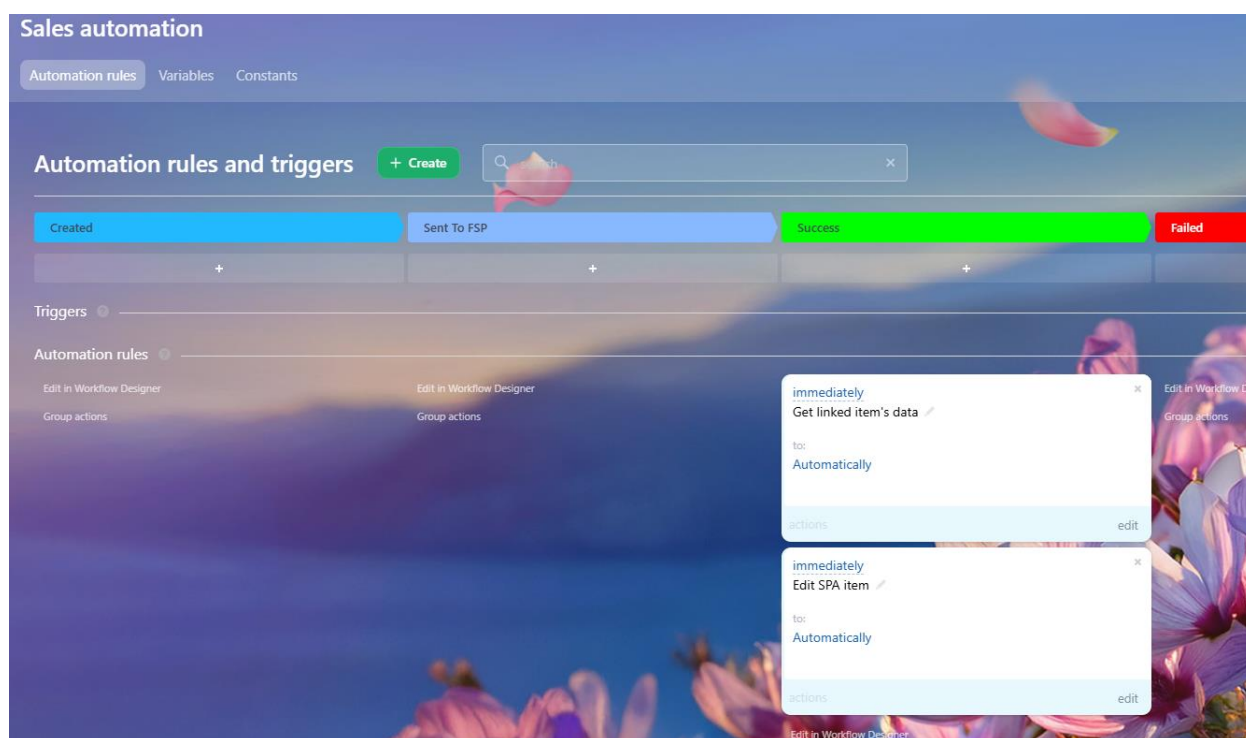
Payment Automations Documentation

1. Automation Flow in Payment Pipeline

The **Payment** entity progresses through the following stages:

- **Created**
- **Sent to FSP**
- **Success**
- **Failed**

Automation rules handle linking with beneficiary data and updating statuses to ensure accurate tracking of payments.



2. Rule: Get Linked Beneficiary Data

When a payment is created, the system automatically retrieves the details of the linked beneficiary.

Execution: Immediately

Linked to: Beneficiaries

Get linked item's data ?

Execution In parallel

Time Immediately

Condition Collapse ^

Add condition

Linked to:

Beneficiaries

SAVE

CANCEL

3. Rule: Update Beneficiary Stage

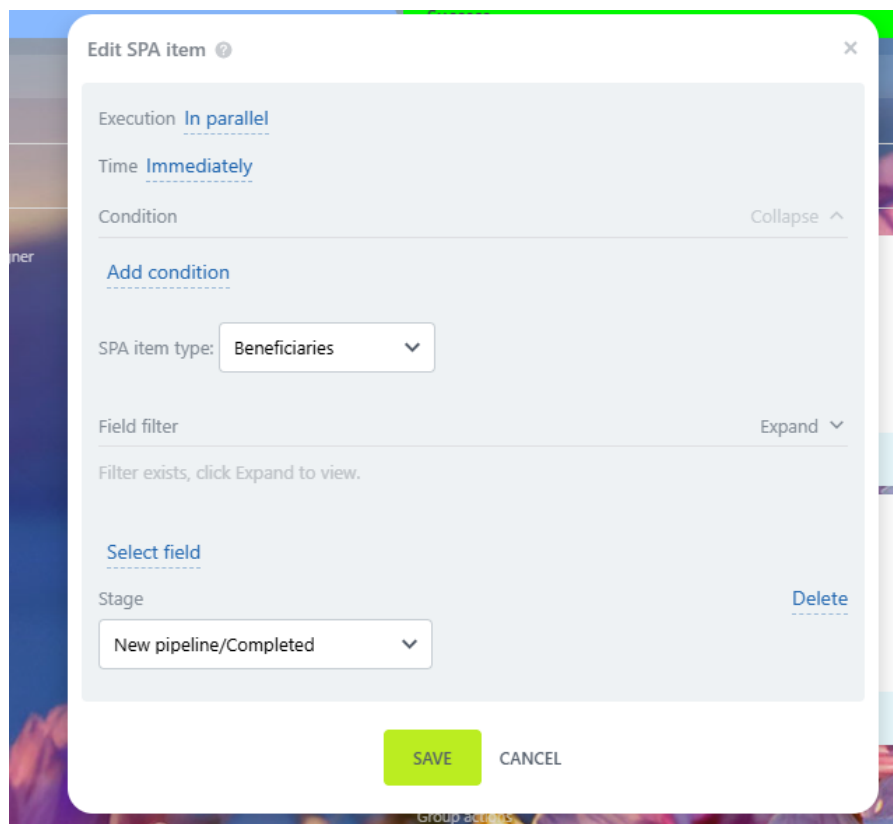
Once a payment record is updated, the automation also updates the linked **Beneficiary** record to mark the payment as completed.

Execution: Immediately

Action: Edit SPA Item

Target Item Type: Beneficiaries

Field Updated: Stage → Completed



Summary

These payment automations ensure that:

- Every payment is tied back to a beneficiary.
- The beneficiary's status is automatically updated upon successful payment.
- Payments can be clearly tracked through success/failure stages.

This setup enforces consistency across the **Beneficiary → Payment** workflow and minimizes the need for manual updates.