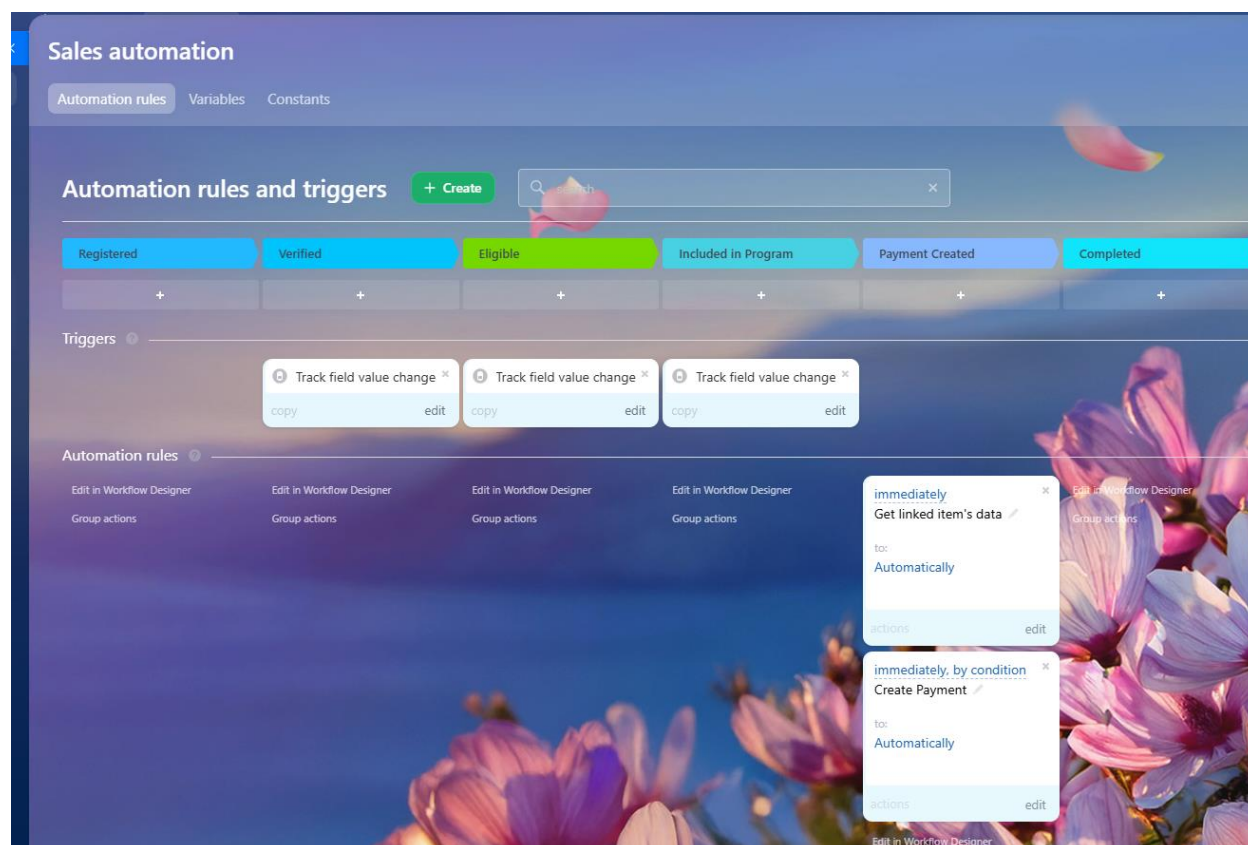


1. Automation Flow in Beneficiary Pipeline

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.



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?

Track field value change

Condition

Personal Details Verified
equal to
Yes

AND
OR

Vulnerability Criteria Verified
equal to
Yes

AND
OR

Additional Vulnerability Criteria Verified
equal to
Yes

AND
OR

Children verified?
equal to
Yes

AND
OR

Duplicate Check?
equal to
Unique

Add condition

Trigger name:

Track field value change

Track fields:

☒ Children verified?
☒ Duplicate Check?

Select fields

Change stage as:

minkejackwedding...
+ change

☒ Allow moving back to previous stage

SAVE

CANCEL

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

Track field value change

Condition

Eligible for projects

equal to

Yes

Children deduplicated check

equal to

Unique

AND

OR

Add condition

Trigger name:

Track field value change

Track fields:

☒ Eligible for projects

[Select fields](#)

Change stage as:

minkejackwedding...

+ change

☒ Allow moving back to previous stage

SAVE

CANCEL

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

Track field value change

Condition

Collapse ^

Projects not empty

×

AND OR

Stage not equal to New pipeline/Completed

×

[Add condition](#)

Trigger name:

Track field value change

Track fields:

☒ Projects

[Select fields](#)

Change stage as:

Responsible person

×

+ change

☒ Allow moving back to previous stage

SAVE

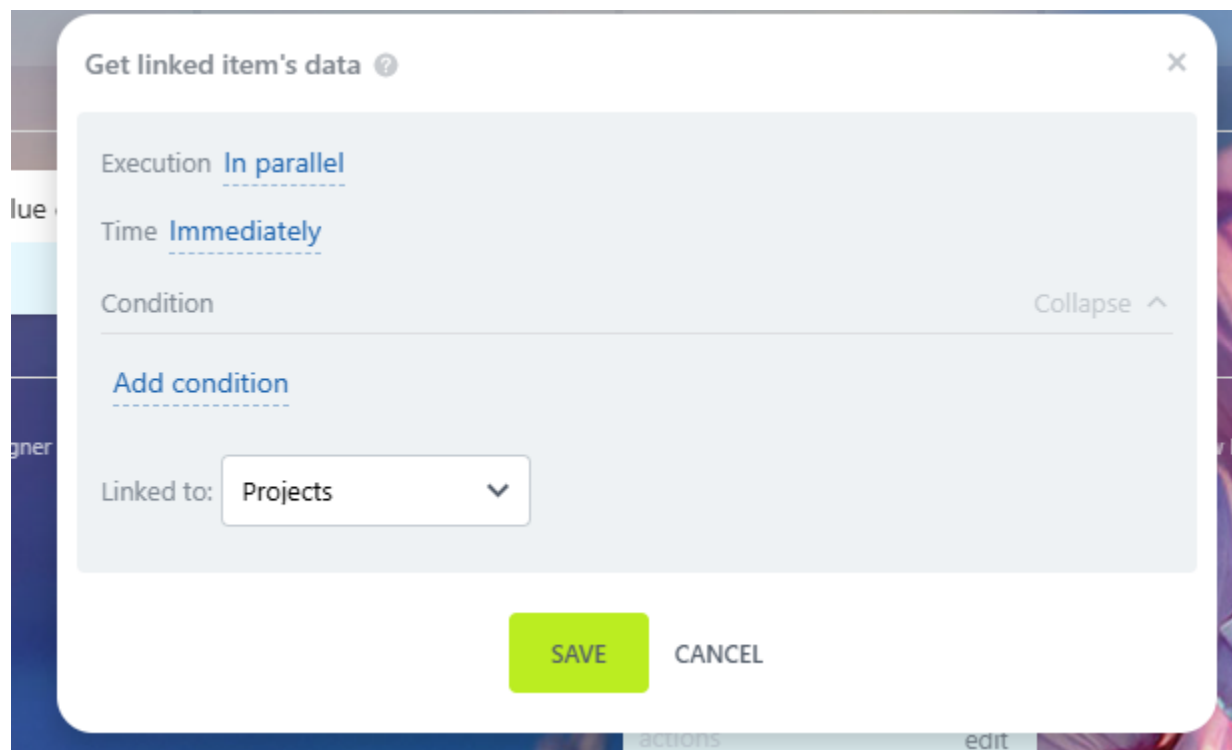
CANCEL

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



Get linked item's data ?

Execution In parallel

Time Immediately

Condition Collapse ^

[Add condition](#)

Linked to: Projects ▼

SAVE **CANCEL**

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.

Create Payment ?

×

Execution In parallel

Time Immediately

Condition

Collapse ^

STAGE_ID equal to DT1046_15:PREPARATION

×

AND OR

Previous stage equal to New pipeline/Included in Program

×

Add condition

CRM item type: Payments

▼

Name:

...

External ID:

...

Created by:

+ select

Responsible person:

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 → {{Patronymic}}

- 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.