EuProximaX – Website Process Flow
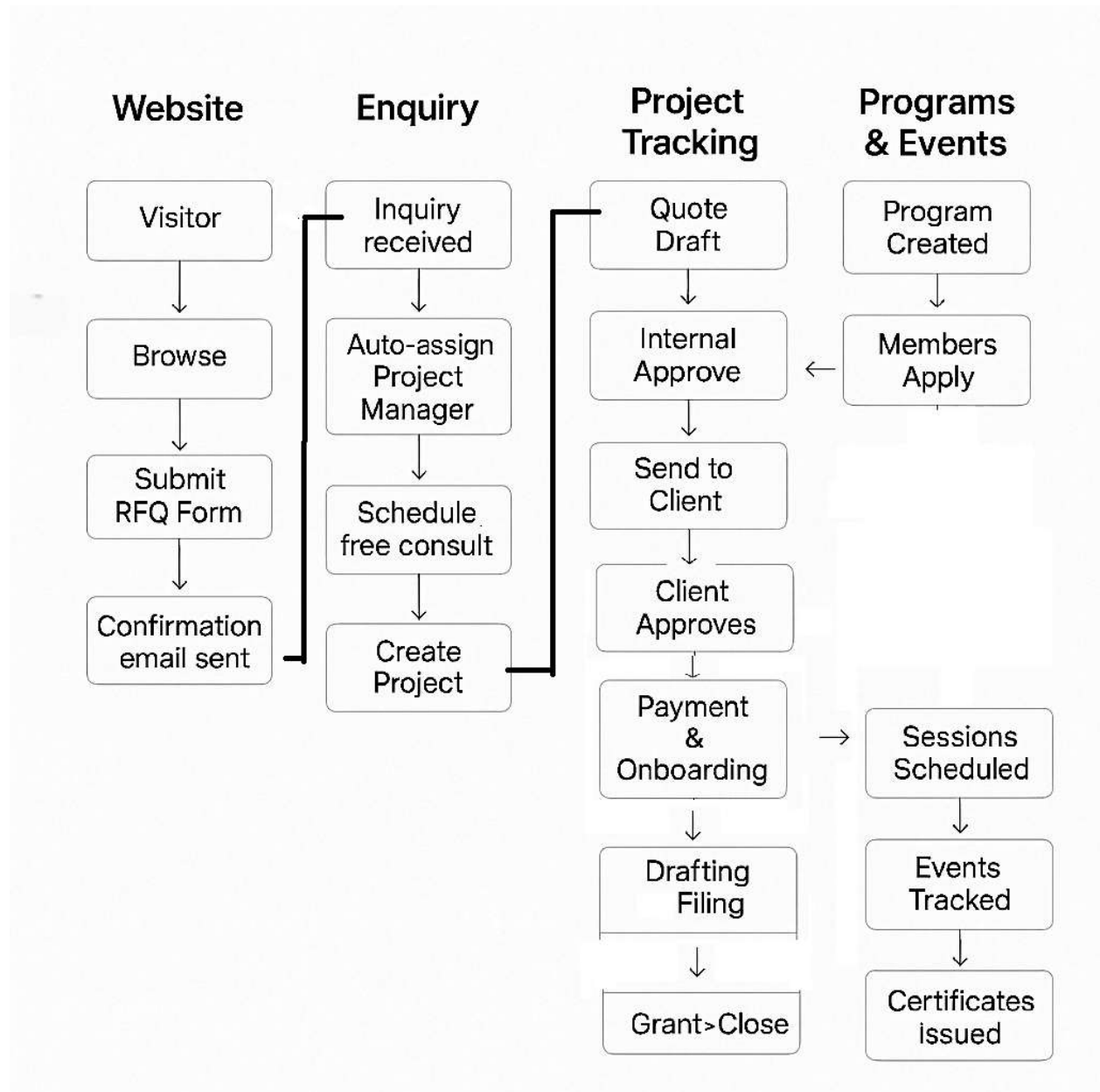

1. Website

Flow:
Visitor → Browse → Submit RFQ Form → System validates → Confirmation email sent

Outcome:
New Inquiry created in backend with attachments and client contact info.

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2. Enquiry

Flow:
Inquiry received → Auto-assign Project Manager → Schedule free consult → Create Project

Outcome:
Project initialized with assigned PM, client data, and timeline for next steps.

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3. Project Tracking

Flow:
Quote Draft → Internal Approval → Send to Client → Client Approves → Create Invoice → Payment Received → Drafting → Filing → Grant → Close

Outcome:
All project stages logged and tracked through automated pipeline.

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4. Payment

Flow:
Invoice Generated → Payment Link (Razorpay) → Client Pays → Webhook Confirmation → Invoice Updated → Receipt sent

Outcome:
Payment status synced automatically; project moves to "Payment Received" stage.

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5. Programs, Members & Events

Flow:
Program Created → Members Apply → Review & Approve → Payment & Onboarding → Sessions Scheduled → Events Tracked → Certificates Issued

Outcome:
Cohort management with progress tracking, event attendance, and member certificates.

Overall System Summary

Area	Trigger	Key Automation	Output
Website	RFQ Form	Email & Inquiry Creation	Inquiry Record
Enquiry	New Inquiry	PM Auto-Assign	Project Created
Project	Quote Approval	Invoice + Task Generation	Active Project Stage
Payment	Webhook Verified	Stage Update	Payment Logged
Programs	Member Accepted	Reminder + Certificate	Cohort Dashboard

1. Website	2. Enquiry	3. Project Tracking	4. Payment	5. Programs & Events
Flow:	**Flow:**	**Flow:**	**Flow:**	**Flow:**
1. Visitor → 2. Browse → 3. Submit RFQ Form → 4. System validates → 5. Confirmation email sent	1. Inquiry received → 2. Auto-assign Project Manager → 3. Schedule free consult → 4. Create Project	1. Quote Draft → 2. Internal Approval → 3. Send to Client → 4. Client Approves → 5. Create Invoice → 6. Payment & Onboarding → 7. Drafting → Filing → 8. Grant → Close	1. Invoice Generated → 2. Payment Link (Razorpay) → 3. Client Pays → 4. Webhook Confirmation → 5. Invoice Updated → 6. Receipt sent	1. Program Created → 2. Members Apply → 3. Review & Approve → 4. Payment & Onboarding → 5. Sessions Scheduled → 6. Events Tracked → 7. Certificates Issued
		Outcome		
New Inquiry created in backend with attachments and client contact info.	Project initialized with assigned PM, client data, and timeline for next steps.	All project stages logged and tracked through automated pipeline.	Payment status synced automatically; project moves to "Payment Received" stage.	Cohort management with progress tracking, event attendance, and member certificates.