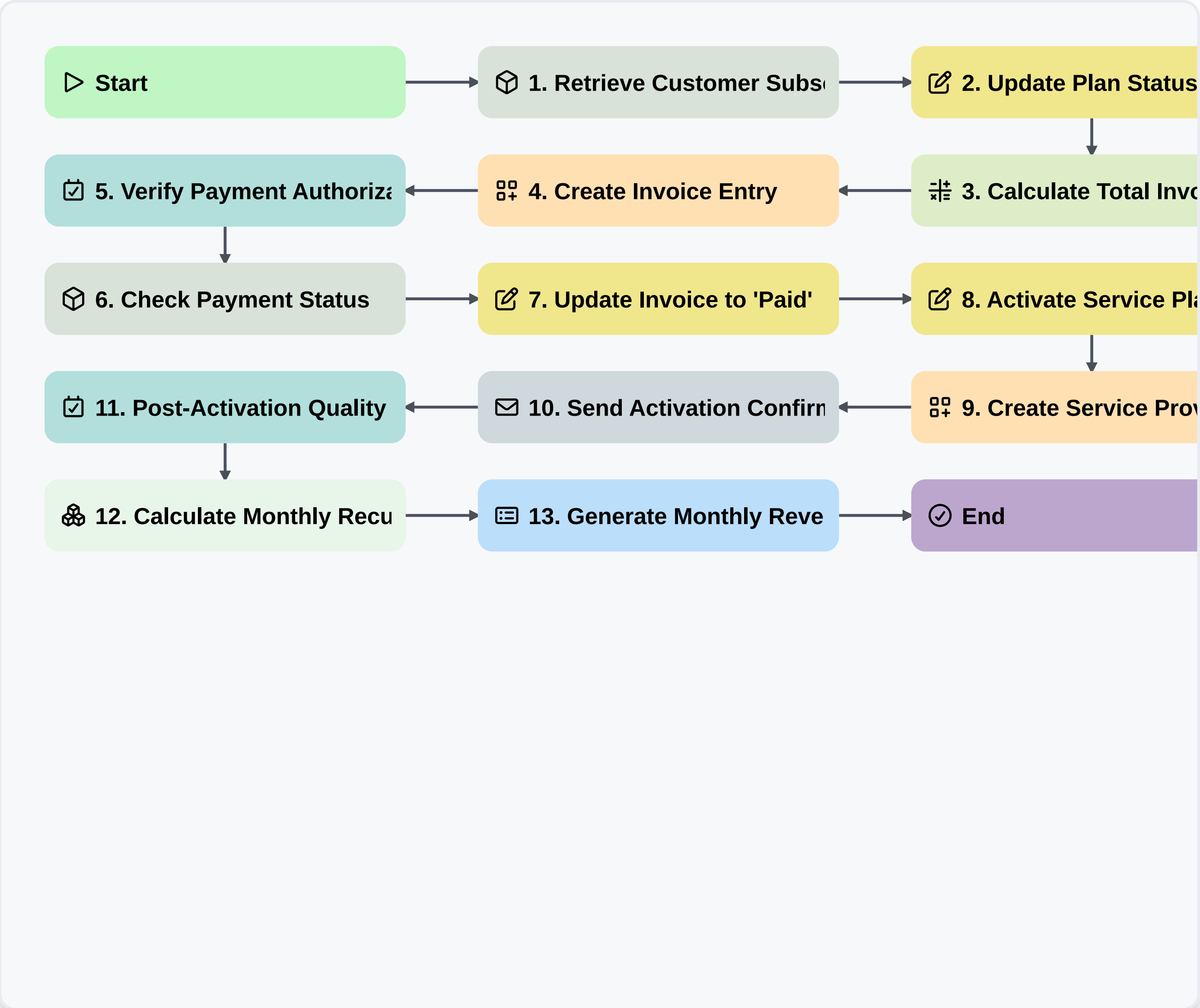
ChecklistGuro

Pre-Paid Service Plan Management Process



Start
Start of the Workflow/Process.

1. Retrieve Customer Subscription Details
Fetch the active service plan and customer contact information from the Customer Data Model.

2. Update Plan Status to 'Processing'
Update the specific Service Plan entry to reflect that a renewal or new purchase is currently being processed.

3. Calculate Total Invoice Amount
Sum the base plan cost, applicable taxes, and any add-on service fees.

4. Create Invoice Entry
Generate a new entry in the Invoices Data Model linked to the customer and the calculated amount.

5. Verify Payment Authorization
Assign a task to the Finance Officer to confirm that the pre-authorized payment has successfully cleared.

6. Check Payment Status
Retrieve the payment record from the Transactions Data Model to verify 'Success' status.

7. Update Invoice to 'Paid'
Update the status of the previously created Invoice entry to 'Paid' once verification is complete.

8. Activate Service Plan
Update the Service Plan entry to change the 'Status' field from 'Pending' to 'Active' and update the 'Start Date'.

9. Create Service Provisioning Log
Create a new entry in the Audit Log Data Model to document the activation of the plan.

10. Send Activation Confirmation
Send a confirmation email to the customer containing their new plan details and receipt.

11. Post-Activation Quality Check
Assign a task to the Customer Success team to ensure all digital features are accessible to the user.

12. Calculate Monthly Recurring Revenue (MRR)
Aggregate all 'Active' service plan entries to calculate the total sum of revenue for the current period.

13. Generate Monthly Revenue Report
Create a summary report showing the number of new pre-paid plans vs. renewals for the month.

End
End of the Workflow/Process.