

Auto-Pilot — SOP

How this module works

A rules engine that runs your agency's routine work on autopilot — 64 toggleable rules across 8 categories, each re-checked hourly, so a lead, follow-up, invoice, or task doesn't need a human to notice it and act.

SECTIONS

● Lead Auto-score, auto-route to a nurture sequence, auto-assign, and send a welcome WhatsApp message when a new lead comes in.	● Follow-up Mark overdue follow-ups, reschedule missed ones, escalate repeatedly-missed leads, and adjust lead scores after a call is logged.
● Nurture Enroll converted/silent leads into the right sequence, pause a sequence the moment a lead replies, and resume it if they go quiet again.	● Invoice Send WhatsApp notifications on creation and payment, chase overdue invoices, and mark them overdue automatically.
● Team Auto-assign new tasks to the least-loaded member and escalate tasks left unassigned or overdue.	● Content Auto-generate a month's content ideas for active clients and alert when the content calendar is running empty.
● Finance Alert on budget overruns, GST filing deadlines, and negative projected cash flow.	● System Weekly backups, WhatsApp-disconnect alerts, and Business Health Score monitoring.

STEP-BY-STEP WORKFLOW

- 1 Browse the 8 categories below, or use Search/Priority/Status/Trigger filters to find a specific rule.
- 2 Flip a rule's toggle to turn it on — rules needing WhatsApp are marked WA and stay off until WA Engine is connected.
- 3 Rules run automatically on their own schedule (hourly/daily/weekly/monthly, or the moment their trigger event happens) — nothing more to do once enabled.
- 4 Check Recent Automation Activity to see what fired, and Alerts (the bell icon) for anything a rule flagged for your attention.
- 5 Use Enable All / Disable All, or a category's ON/OFF buttons, to toggle a whole group at once.

CONNECTIONS

● Leads Score, status, assignment, and follow-up-date changes made by Auto-Pilot show up immediately in the Leads list — same records, no separate copy.	● Follow-up Overdue-marking and night-before WhatsApp reminders read and write the exact same follow-up queue Follow-up's own page shows.
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●  Nurture Sequence enroll/pause/resume/stop actions go through the same shared enrollment service Nurture's own automatic enrollment uses — never a separate, drifting copy.	●  WhatsApp Engine Every WA-sending rule requires an active WA Engine connection and sends through the same templates and send service WA Engine manages.
●  Team Task auto-assignment and escalation read and write the same Task records the Team board shows.	●  Invoice Overdue-marking and payment-triggered messages act on the same Invoice records the Invoice module manages.
●  Social AI The monthly content-idea rule generates ideas through the exact same generator Social AI's own UI uses — no duplicate AI-prompt logic.	●  Alerts Every alert-producing rule inserts into the same Alerts table the bell-icon Alerts page reads — nothing Auto-Pilot-specific to check separately.