⚡ **VELTRIX OS**

Standard Operating Procedure

**SOP DOCUMENT**

21 Aug 2026

# Calendar — SOP

How this module works

A hub view of everything scheduled across the agency — follow-ups, task due-dates, invoice due/paid dates, proposal expiries, and scheduled social posts, all pulled into one grid.

## SECTIONS

- **Month**
  Full month grid — every follow-up, task, invoice, proposal, and post at a glance.
- **Week**
  Hour-by-hour view across 7 days — good for seeing exactly when things are scheduled.
- **Day**
  One day, broken into half-hour slots — the most detailed view for a packed schedule.
- **Agenda**
  A scrollable list of upcoming events, searchable by title or lead name.

## STEP-BY-STEP WORKFLOW

1. Pick a view — Month, Week, Day, or Agenda — depending on how much detail you need.
2. Click any event pill to see its full detail — company, status, notes, and quick actions.
3. Use the + Quick Add button to create a new event without leaving the calendar.
4. Check AI Suggestions in the sidebar for prioritized scheduling tips based on overdue items.
5. Use the Client or Team Member filters to scope the calendar down to one person or account.

## CONNECTIONS

- **Leads**
  Follow-up dates auto-populate as calendar events — no manual entry.
- **Tasks**
  Due dates auto-populate from the Team module.
- **Invoices**
  Due and Paid dates auto-populate — mark an invoice paid straight from its calendar event.
- **Proposals**
  Expiry dates auto-populate, plus an Extend Validity action (now properly handled in ProposalController).
- **Content Ideas (Social AI)**
  Scheduled posts auto-populate on their scheduled date.
- **Team / Goals / Projects / Leave / Vendor Payments**
  5 modules write calendar events directly (task/goal/project/milestone due-dates, approved leave, vendor payment reminders) — broadcast-enabled since Phase C, so they appear live without a refresh.