⚡ **VELTRIX OS**

Standard Operating Procedure

SOP DOCUMENT

26 Sep 2026

Dashboard — SOP

How this module works

Gives an at-a-glance, always-current snapshot of the whole business — leads, revenue, expenses, team, and automation — with one-click drill-downs into the numbers that matter, without ever leaving the page.

SECTIONS

- **Live KPI Snapshot**
  8 headline numbers (leads, pipeline value, follow-ups, hot leads, revenue, outstanding, expenses, net profit), kept current via an instant Reverb push the moment something changes elsewhere, with a 5-minute background poll as a fallback if the real-time connection ever drops.
- **In-Page Drill-Downs**
  click any of 6 KPI cards for a focused modal summary — recent leads, pipeline breakdown, today's follow-ups, hot leads, outstanding invoices, or this month's expenses — each with a 'View Full [Module]' link, instead of being redirected away from the dashboard.
- **Revenue Trend**
  6 months of revenue vs. expenses, toggleable between bar and line view; the choice is remembered on this browser for next time.
- **Pipeline Overview**
  a live Kanban-style snapshot across every lead status, with a shortcut to the full Kanban board.
- **Team Pulse**
  who's active right now, refreshed automatically every 30 seconds.
- **Goals & Automation**
  active goals nearest their deadline, plus a feed of recent Auto-Pilot rule activity.
- **Built for Speed**
  the whole page loads in 29 database queries (down from 50), and any data-fetch that fails is now logged instead of silently showing a zero.

STEP-BY-STEP WORKFLOW

1. The page loads once, fetching KPIs, leads, pipeline breakdown, agenda, team pulse, goals, and the 6-month revenue trend in a single optimized pass (29 queries, down from 50).
2. KPI numbers then stay current two ways: an instant push update whenever something changes elsewhere (Reverb), and a 5-minute background poll as a fallback if that connection ever drops.
3. Clicking a KPI card opens a focused modal instead of navigating away — 3 of 6 render instantly from data already loaded; the other 3 fetch detail only when opened, keeping the page load lean.
4. The Revenue Trend chart switches between bar and line view from the exact same underlying numbers — no re-fetch, just a different rendering of the same data.
5. Team Pulse refreshes on its own 30-second cycle, independent of the main KPI poll.
6. Every 'View Full X' link hands off to that module's real page — Leads, Invoice, Expenses, Follow-up, Team OS — for anyone who wants more than the summary.
7. Revenue This Month and Net Profit are plain summary cards, not clickable — they're derived values (revenue minus expenses) with no single dedicated module of their own to drill into.

8 If any one data query fails, that section falls back to a safe zero/empty state and the failure is now logged — the dashboard keeps working, and the failure is traceable instead of invisible.

CONNECTIONS

● ◫ **Leads** every pipeline metric (total/active/converted/hot/warm, pipeline value, recent activity, the Kanban snapshot) reads directly from Leads' own table. Follow-ups Today uses Leads' own follow-up-date field, with a hand-off to the dedicated Follow-up module for the full queue.	● ◫ **Invoice** Revenue This Month, Outstanding, and one side of the Revenue Trend all come straight from Invoice's own table.
● ◫ **Expenses** Expenses This Month and the other side of the Revenue Trend come straight from Expenses' own table.	● ◫ **Team OS** Team Pulse reads who's active straight from Team OS's member records; Today's Agenda's task items are Team OS's own tasks.
● ◫ **Goals** the Goals section reads directly from Goals' own active-goal records, nearest-deadline-first.	