

AI Day Planner — SOP

How this module works

Generates and tracks each team member's daily work plan — tasks due, lead follow-ups, and calendar events — with AI-suggested time-blocked schedules, live team-capacity visibility, and an end-of-day performance report.

SECTIONS

● KPI Dashboard Team Today, Tasks Today, Follow-ups, and Team Load — computed from the same live data driving the member cards below.	● AI Daily Plans A time-blocked morning/afternoon/evening plan per member, generated individually or for the whole team at once.
● Today's Spotlight Revenue-goal ring, pending-collection total, and today's scheduled events — a quick cross-module snapshot without leaving the page.	● Team Capacity A visual load bar plus per-member Available/Normal/High/Overloaded pills, based on each member's task+follow-up+event count today.
● Task Quick-Actions Start or complete a task, or mark a follow-up done, directly from a member's card — synced live to every other open session.	● End-of-Day Report An AI summary of completed-vs-total tasks after 5 PM, with one click to send it to the team on WhatsApp.

STEP-BY-STEP WORKFLOW

- Viewing the page shows today (or Yesterday/Tomorrow) automatically-scoped tasks, follow-ups, and calendar events for every active team member.
- Generate an AI plan for one member, or all eligible members at once — Generate All uses a single combined AI call for the whole team, not one per person.
- If AI is unavailable, each member automatically gets a deterministic fallback plan instead — nobody is left without a plan.
- Starting or completing a task, or marking a follow-up done, syncs live across every open session — no page refresh needed.
- A member marked on leave in Team OS is dimmed here and automatically skipped by the next Generate All Plans run.
- A task added without a due date will not appear in any day's plan view — only tasks due on or before the viewed day are shown.
- After 5 PM, an End-of-Day summary becomes available — AI reviews completed-vs-total tasks and can be sent to the team on WhatsApp in one click.
- The 4 KPI summary numbers reflect the last full page load, not second-by-second — the member cards below them do stay live.

CONNECTIONS

●  Team OS Reads active team members, their tasks, and today's attendance — a member marked on leave is automatically dimmed and skipped from AI plan generation.	●  Leads Pulls each member's leads with a follow-up due today, so their daily plan includes exactly who to call, not just tasks.
●  Calendar Reads today's scheduled events per member (and team-wide events) into both the daily plan and the Spotlight panel.	●  Invoice Powers the Spotlight panel's revenue-goal ring and pending-collection total, computed live from real invoice data.
●  WhatsApp One-click send for the morning team update, a member's personal focus message, an invoice reminder, and the end-of-day summary.	●  App Settings The monthly revenue target shown in the Spotlight ring is a configurable App Setting, not a hardcoded number.