⚡ **VELTRIX OS**

Standard Operating Procedure

SOP DOCUMENT

24 Sep 2026

Follow-up OS — SOP

How this module works

Sales-team priority queue plus AI communication hub — surfaces which leads need attention today, helps write and respond to messages, and captures what worked after every deal closes.

SECTIONS

Priority Queue
Every lead due for follow-up, ranked by urgency — click straight into a call, message, or note.

Objections
A library of common objections with AI-generated responses you can send as-is or edit and save.

AI Analysis
Paste a conversation to get sentiment and next-step suggestions, and log a Win/Loss debrief once a deal closes.

Team Tracker
Team-level follow-up performance, plus Clients at Risk — leads going cold that need a save before they churn.

STEP-BY-STEP WORKFLOW

1. Start on Priority Queue to see which leads are urgent or overdue today.
2. Open a lead card and use its quick-actions to call or send a message right from there.
3. If a lead raises an objection, go to the Objections tab and generate an AI response to send back.
4. Once a deal closes or is lost, run a Debrief on the AI Analysis tab to capture what worked and what did not.
5. Check Team Tracker regularly to see overall team performance and catch at-risk clients early.

CONNECTIONS

Leads
Primary data-source (Lead, LeadActivity, TeamMember models) — every lead, score, and activity shown here comes straight from the Leads module.

WA Engine
Every WhatsApp message sent from here (AI Msg, quick-send, objection responses) goes out through the WA Engine send pipeline.

Alerts
The Proposal Activity strip reads from the shared alerts table — dismissing here marks the same alert read everywhere else.

Churn/Retention
Team Tracker Clients-at-Risk section calls the Churn module AI retention-script generator for at-risk leads.

Objections
Built in as its own tab here — objection-handling stays in the same flow instead of a separate module to switch to.

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