

Goals — SOP

How this module works

A goal-tracking hub for individual and team targets — auto-syncs progress from Invoices/Leads/Tasks, tracks milestones, nudges deadlines onto the Calendar automatically, and gives an AI health-check across everything active.

SECTIONS

● Basic tab Title, category, period (daily/weekly/monthly/quarterly/yearly/custom), target value, unit, icon.	● Assignment tab Team-wide or one Team-OS member, plus internal notes.
● Automation tab Auto-sync from a live data source, add-to-Calendar toggle, and a before-deadline reminder.	● Milestones tab Up to 5 milestones per goal — each one clickable straight from the goal card to mark complete.
● Update-Progress modal Set a new value or add to the current one, with a live preview of the resulting progress bar before saving.	

STEP-BY-STEP WORKFLOW

- 1 Create a goal — pick a period, a target value and unit, and who it's for (team-wide or one member).
- 2 Optionally turn on Auto-Sync so the goal updates itself from Invoice Revenue, Lead Count, Task Completion, or Invoice Count — no manual entry needed.
- 3 Add up to 5 milestones to break the goal into checkpoints, and click a milestone dot on the card any time to mark it done.
- 4 Open the AI Goal Advisor for a health-check across every active goal — achievable/stretch/unlikely verdicts, quick wins, one recommended action for today.
- 5 Use Update Progress for a manual push, or Sync Now on an auto-sync goal to pull the latest value immediately.
- 6 A WA reminder banner appears automatically as a goal's deadline approaches (per its own reminder-days setting) — one click sends it over WhatsApp.

CONNECTIONS

● Invoices Auto-sync sources Invoice Revenue (paid invoices this period) and Invoice Count (invoices raised this period) read directly from the Invoice module — no manual entry.	● Leads Auto-sync source Lead Count reads new-leads-this-period directly from the Leads module.
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● Tasks Auto-sync source Task Completion reads completed-tasks-this-period from Team-OS Tasks.	● Calendar A goal's deadline (and the Add-to-Calendar toggle) creates and keeps a linked Calendar event in sync live — no manual entry, no refresh needed.
● Team-OS An individual goal links to a real Team-OS member — the same person picker used across the CRM.	