⚡ **VELTRIX OS**

Standard Operating Procedure

SOP DOCUMENT

26 Sep 2026

Leads — SOP

How this module works

CRM pipeline core — captures, scores, and tracks every lead through the sales pipeline, with team-assignment, activity-logging, AI-assisted next-actions, and a fully customizable taxonomy (categories, sources, goals, and more).

SECTIONS

- **Kanban Pipeline**
  Every lead in one status-pipeline view — new, hot, warm, cold, negotiating, proposal sent, converted, or lost.
- **Filters & Search**
  Search by name, phone, or company, and filter by status, source, category, or assigned team member.
- **Lead Detail & 360 View**
  Open any lead for its full activity timeline, invoices, proposals, nurture journey, and conversation history in one place.
- **Manage Settings**
  Add, edit, or remove your own categories, sources, goals, conversation types, and outcomes — no hardcoded lists.

STEP-BY-STEP WORKFLOW

1. Add a new lead manually, or import a batch — duplicates are checked automatically by phone or name.
2. Track it through the status-pipeline as it moves from new to hot, warm, or cold, through to negotiating and proposal-sent.
3. Use AI-assisted next-actions and closing-scripts to decide what to do next, with a rule-based fallback if AI is unavailable.
4. Log every call, WhatsApp message, or meeting as an activity — the score updates automatically as engagement changes.
5. Open View 360 any time for the complete picture — timeline, invoices, proposals, nurture status, and conversations together.

CONNECTIONS

- **Follow-up**
  Primary data-source, with real-time sync — every lead/score/status change reflects there instantly.
- **Nurture**
  A status change here automatically triggers nurture-sequence enrollment for that lead.
- **Sales Report**
  Reads Leads data directly for all its analytics — no separate/duplicate data entry.
- **Lost Deal Analyzer**
  Analyzes every lost-status lead here, sharing the same lost_reason taxonomy for consistency.
- **Churn/Retention**
  Generates AI retention-scripts directly from this lead data.