

Nurture OS — SOP

How this module works

WhatsApp drip-sequence automation — enrolls leads into pre-built sequences (Hot, Warm, Cold, Reactivation, Retention, Referral, Post-Quote, or Custom) based on their status or behavior, then automatically sends scheduled messages, calls reminders, and status changes on a day-by-day timeline until the lead converts or the sequence ends.

SECTIONS

● Sequences Every sequence with its health status, step count, and how many leads are enrolled — enroll, pause, resume, or duplicate one from here.	● Active What is due today, plus the full enrollment table — see every lead currently moving through a sequence and change or stop it.
● Insights Performance per sequence, overall analytics, and Behavioral Triggers — rules that auto-enroll or alert based on a lead score change, silence, or a missed follow-up.	● Builder Create or edit a custom sequence — add steps, set the day each one fires, and pick WhatsApp, Call, Wait, Evaluate, or Task as the action.

STEP-BY-STEP WORKFLOW

- 1 Open Builder to create a new sequence, or use one of the ready-made ones (Hot, Warm, Cold, etc.).
- 2 Enroll a lead manually from the Enroll Lead button, or let the system auto-enroll based on lead status or a Behavioral Trigger.
- 3 Scheduled steps execute automatically on their set day — a WhatsApp message, a call reminder, or a status re-route.
- 4 Check the Active tab regularly to see what is Due Today and monitor every lead currently in a sequence.
- 5 Use Insights to track which sequences convert best and review Behavioral Triggers that are firing.

CONNECTIONS

●  Leads Every enrollment reads and writes real Lead records — score, status, phone, company and name for message personalization, and the is_nurture flag that makes a lead eligible for status-based auto-enrollment.	●  WA Engine WhatsApp-type steps send through the same WaSendService the rest of the app uses — real Meta Business API sends, the same 24h-window rules, and the same fallback-template logic, not a separate channel.
●  AutoPilot AutoPilot's "Enroll in Sequence" rule action routes through this same NurtureEnrollmentService every other enrollment path uses, so its own rules (score thresholds, status changes) enroll leads without bypassing the is-active/no-double-enrollment guarantees.	●  Settings → WhatsApp The "Nurture Sequences" master toggle (off by default) gates whether a lead's status change (Hot/Warm/Cold) auto-enrolls them at all — must be turned on in Settings for status-based auto-enrollment to fire.

● ☐ Alerts

Each due nurture step creates a real "Nurture Action Due" alert in the app-wide Alerts bell, with its own dedicated handling there — completing a step from the alert marks it read.