⚡ VELTRIX OS

Standard Operating Procedure

SOP DOCUMENT

26 Sep 2026

Projects — SOP

How this module works

A project-management hub for tracking client work from kickoff to delivery — 3 views (Grid/List/Timeline), a 5-tab detail view per project, live progress from milestones, and an AI health-check across everything active.

SECTIONS

- **Overview tab**
  Snapshot stats — progress %, milestones done, budget, due date — plus description and assigned team.
- **Milestones tab**
  Add/complete milestones; progress % recalculates automatically, and any milestone with a due date creates a Calendar event.
- **Tasks tab**
  Link a Team-OS task straight to this project — it shows up on the assignee's own task board too, same task either place.
- **Notes tab**
  A running notes pad for internal context that doesn't belong anywhere else.
- **Activity tab**
  Auto-built timeline from milestone/task creation and completion — nothing to log by hand.

STEP-BY-STEP WORKFLOW

1. Set the due date, priority, and Project Owner — add milestones with their own due dates right on the same form (+ New Project any time).
2. Track progress from whichever view fits — Grid (cards), List (table), or Timeline (Gantt-style). Progress % always auto-calculates from milestones completed.
3. Open AI Insights for a health-check across every active project — at-risk flags, bottlenecks, one recommended action for today.
4. Send a WhatsApp progress update to the client straight from a project's quick-action row.
5. Mark the project Completed once all milestones are done — completion date is recorded automatically.

CONNECTIONS

- **◫ Proposals**
  Projects has a ready-made '+ New Project' form (with the client pre-fillable via a URL parameter) — nothing in Proposals calls it yet, so start a project manually for now after a deal closes.
- **◫ Calendar**
  A project's own due date, and every milestone with a due date (however it was added), creates a Calendar event live — no manual entry, no refresh needed.
- **◫ Team-OS Tasks**
  Tasks linked from a project's Tasks tab are real Team-OS tasks — they appear on the assignee's own task board, not a separate copy.
- **◫ Leads**
  Every project links to a Lead as its client — the Client dropdown pulls from the same Leads list used across the CRM.