

Enable follow-ups for checklist items

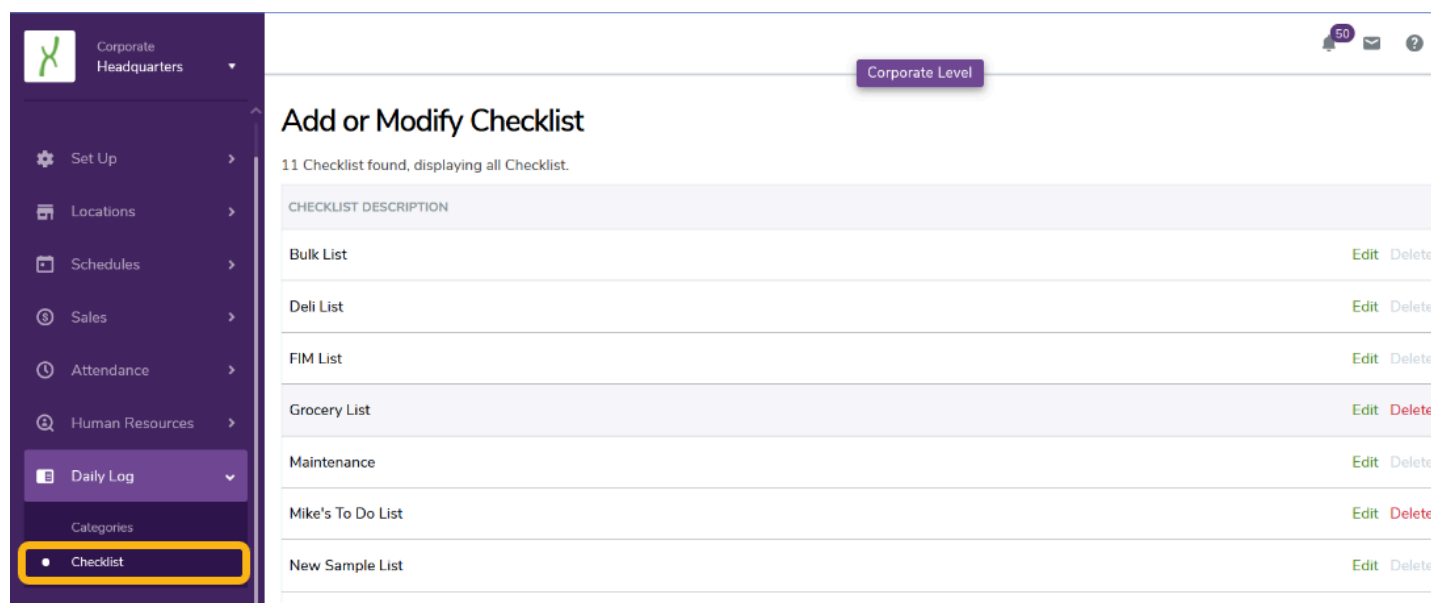
TimeForge's [task management solution](#) allows you to remind managers to follow up on tasks assigned to them or other employees at a location. Each time you assign a follow up to them, a manager/supervisor sees an updated To-Do list item in the "Store Walk" [widget](#) on the dashboard.

This guide walks you through how to configure tasks for follow-ups, assign them, respond, and close out items in your to-do list.

Enable follow-ups for existing tasks

To update existing tasks in a checklist, open up the **Daily Log tab** and click **Checklists**.

If you have more than one location in your account, you'll first need to go to the corporate level before accessing the Checklist page.



The screenshot shows the TimeForge interface. On the left, a sidebar menu has 'Daily Log' expanded, with 'Checklist' highlighted. The main content area is titled 'Add or Modify Checklist' and shows a table of 11 checklists. The table has columns for 'CHECKLIST DESCRIPTION' and actions 'Edit' and 'Delete'.

CHECKLIST DESCRIPTION	Edit	Delete
Bulk List	Edit	Delete
Deli List	Edit	Delete
FIM List	Edit	Delete
Grocery List	Edit	Delete
Maintenance	Edit	Delete
Mike's To Do List	Edit	Delete
New Sample List	Edit	Delete

Next, click on the **Edit** option next to the checklist that has the tasks you want to update.

Once you find the item you want to enable follow-up assignments on, change the Follow-Up box to "Yes." Shown here below:

Task	Follow Up	Allow Comments	Give Ratings	Cadence	MGR Notifications	Remind When
Sweep A	Yes	Yes	Yes	Daily		
Sweep B	Yes	Yes	Yes	Daily		
Sweep C	Yes	Yes	Yes	Daily		

Assign a follow-up to a specific employee

Now that you have some tasks flagged for follow-up, you'll want to assign those follow-ups to someone. To do this:

1. Select/go to the location for which you want to appoint a manager a follow up assignment. Make sure you're on the Today page (the new dashboard).
2. For the "Store Walk" widget, click on the **Edit** button next to the tasks you want to update:

Dashboard

Location: Corporate Office

Store Walk Print ...

Today (Fri, Apr 16)

Group: Sweep Group | Location: Corporate Office Edit Delete

Sweep C

Checklist: Sweeps Fri, Apr 16, 2021

Group: Sweep Group | Location: Corporate Office Comments Edit Delete

Did you walk with your people today and walk your department?

Checklist: Produce Supervisor List Fri, Apr 16, 2021

Group: Produce Sales Floor Area | Location: Corporate Office Comments Edit Delete

3. Once the pop-up appears, fill in any information needed such as star rating, notes, etc., but leave "Complete" unchecked.
4. Select a supervisor/manager from the list for Follow-up.
5. Pick a date you would like for the follow-up to take place by.
6. Click the Save button once you've submitted all your updates.
7. The tasks will then appear on the Follow-up assignee's To Do List for that selected date.

Sweep C

☆☆☆☆☆

Regarding: John D'employee

Due at: 05:00PM

Follow Up

Employee: Jordy Moorman

Date: 04/16/2021

Complete: No

Notes: Please make sure clean out freezer as well in aisle 5.

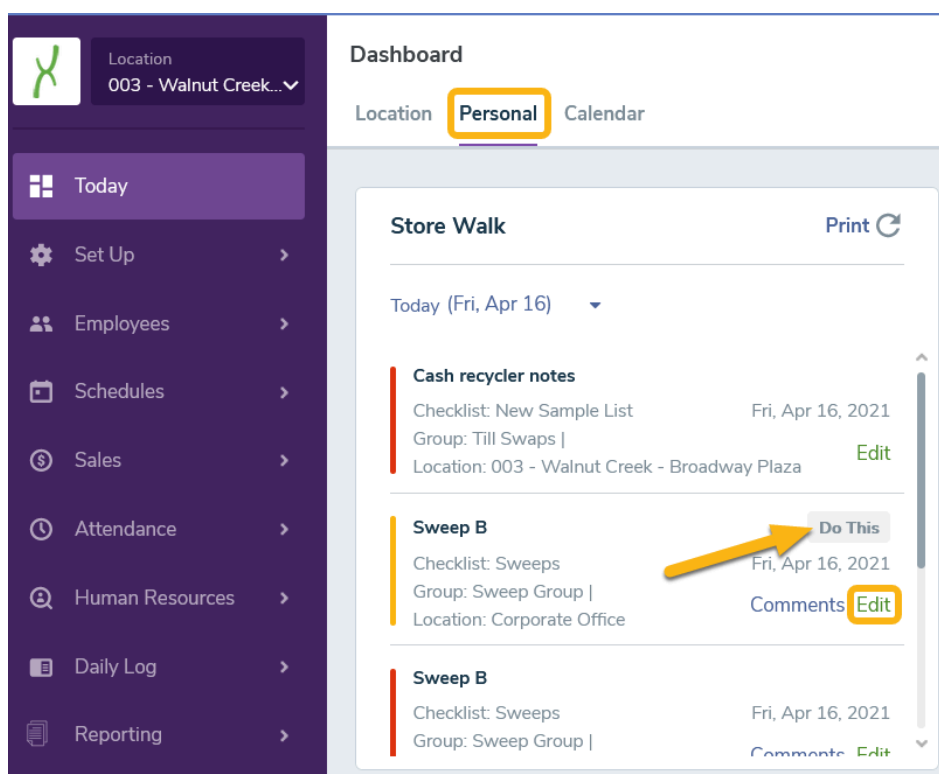
Drag files here or Select Files

Save Cancel

Complete the follow-up

To view any tasks assigned to you personally to follow-up on at your location, navigate to the Today page and select the Personal dashboard. Look for the "Store Walk" widget.

All follow-up tasks have a "Do This" banner next to them:



To complete or update a task, click the **Edit** button next to your assigned task. A pop-up will appear.

1. Type in any notes or upload helpful files or images.
2. Update the Complete option to "Yes" if you finished the task assigned.
3. Click the Save button once you've finalized your changes.

The screenshot shows a pop-up window titled 'Sweep B'. At the top right is a close button (X). Below the title bar, there's a 'Complete' section with a 'No' button, which is highlighted with a yellow circle containing the number 2. Below this is a 'Notes' section with a large text area for typing notes, highlighted with a yellow circle containing the number 1. Below the text area is a file upload area with the text 'Drag files here or Select Files'. At the bottom right are two buttons: 'Save' (highlighted with a yellow circle containing the number 3) and 'Cancel'.