# Ops Execution: Coaching with Follow-Up Actions

**Reference Guide**

## Document Details

Document #: OERG00002_260421

Last updated: September 2026

## System Requirements

- For system and browser requirements, click here: Ops Execution Knowledge Base/System Requirements
- Ops Execution supports all new browser versions within 7 days of release and maintains support for the last 2 releases of each browser. ⛔ **Internet Explorer is NOT supported.**

## Overview

This guide outlines the steps to enable Follow-up Actions in Operations Execution. Follow-Up Actions bridge the gap between identifying a problem and verifying the fix. Use this guide to coach and resolve issues in real-time. This guide covers:

1. Assign Follow-Up Actions (Mobile and Web)
2. Complete Follow-Up Actions at Location (Mobile)
3. Track Follow-up Actions under Tasks (Web)
4. Disable Follow-Up Actions in Forms (Web)

## Key Benefits of Follow-Up Actions

- Turn insights into action by coaching - immediately: Follow-up actions convert issues identified during reviews into clear, trackable tasks tied to the exact submission where the issue was identified.
- Eliminate follow-through gaps: Above-store leaders and franchise business coaches (FBCs) can assign, monitor, and confirm corrective actions in one structured workflow.
- Increase store-level accountability: Locations know exactly what needs to be fixed and by when, with full transparency to corporate.

## Users

- Admins/Owners using Ops Execution in a web browser
- Above-store leaders or managers using Ops Execution in the Mobile App
- Store-level submitters using Ops Execution in the Mobile App on a store device

**Download the latest version of this document here:**
https://links.crunchtime.com/OERG-FollowUpActions
… or scan the QR code to the left.

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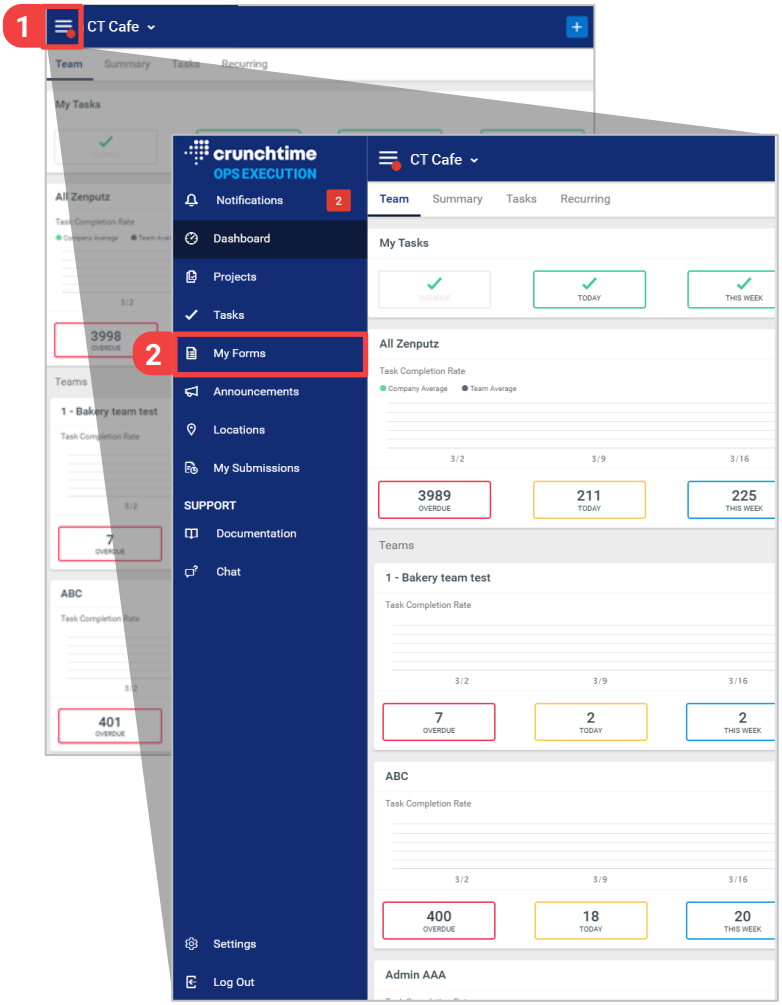
REFERENCE GUIDE

# Assign Follow-Up Actions in Forms (Mobile)

**Ops Execution (Mobile) > Dashboard**




1. From the mobile dashboard, select the menu icon to display the menu panel.

2. Select *My Forms* from the menu to go to your forms.

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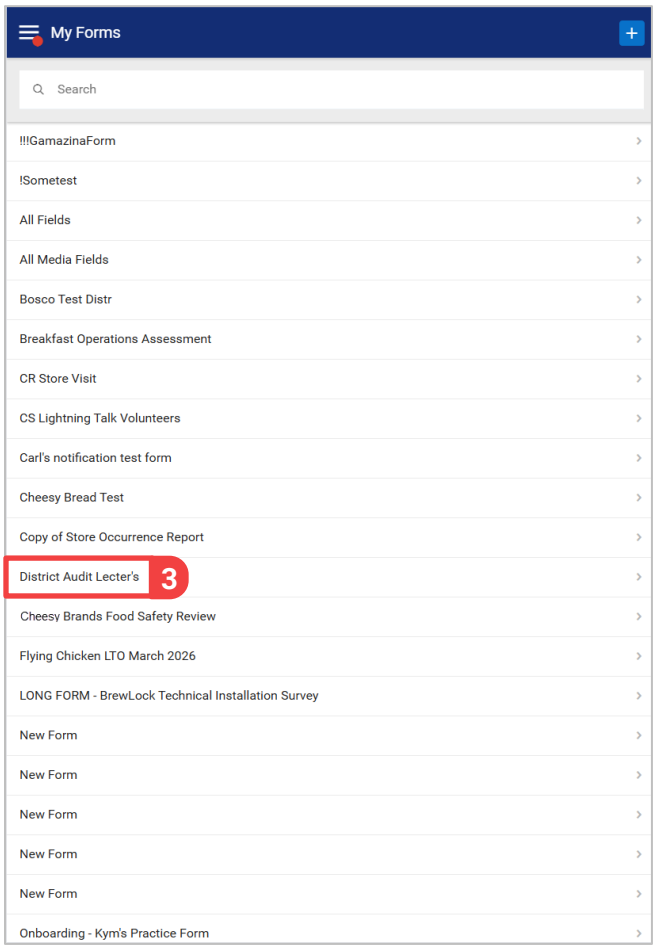
# Assign Follow-Up Actions in Forms

(Continued)

Ops Execution (Mobile) > Dashboard > My Forms




3 Under *My Forms*, find the form for which you'd like to assign follow-up actions and open it. For this example, it's the *District Audit Lecter's* form.

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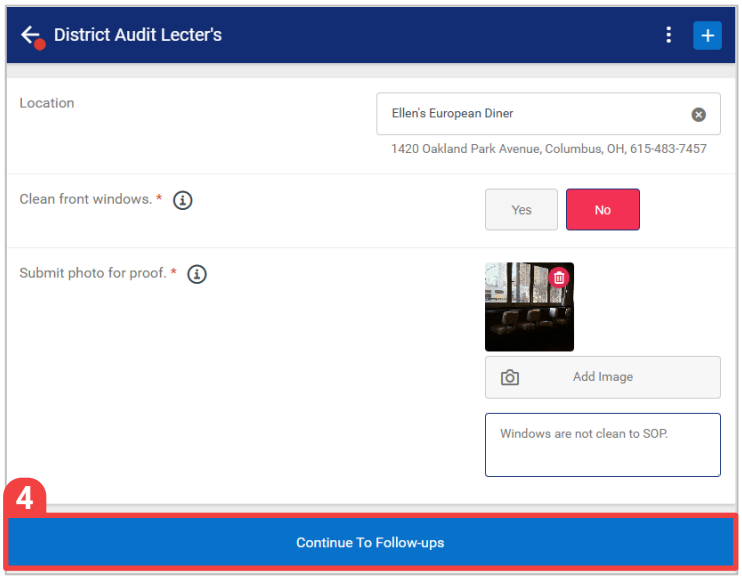
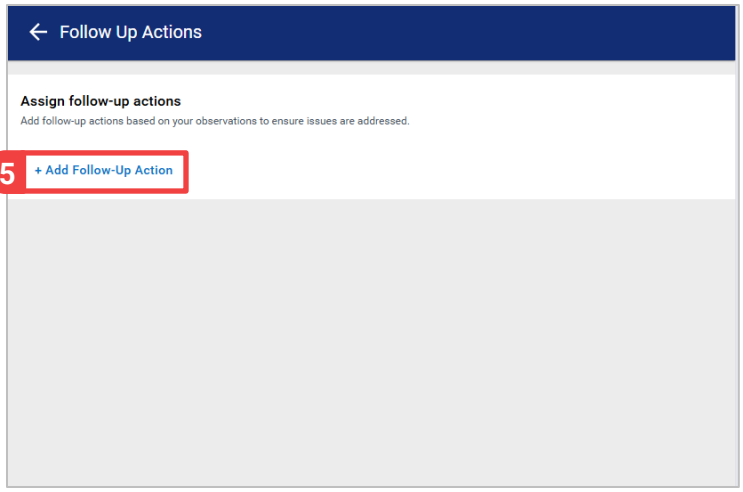
# Assign Follow-Up Actions in Forms

(Continued)

Ops Execution (Mobile) > Dashboard > My Forms > District Audit Lecter's




4 While completing the audit, you discover the windows have not been cleaned properly. By selecting *Continue to Follow-ups*, you can create a follow-up action to request proper window cleaning and a photo as proof.

5 Next, select *+ Add Follow-Up Action* to add your first follow-up action.

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# Assign Follow-Up Actions in Forms

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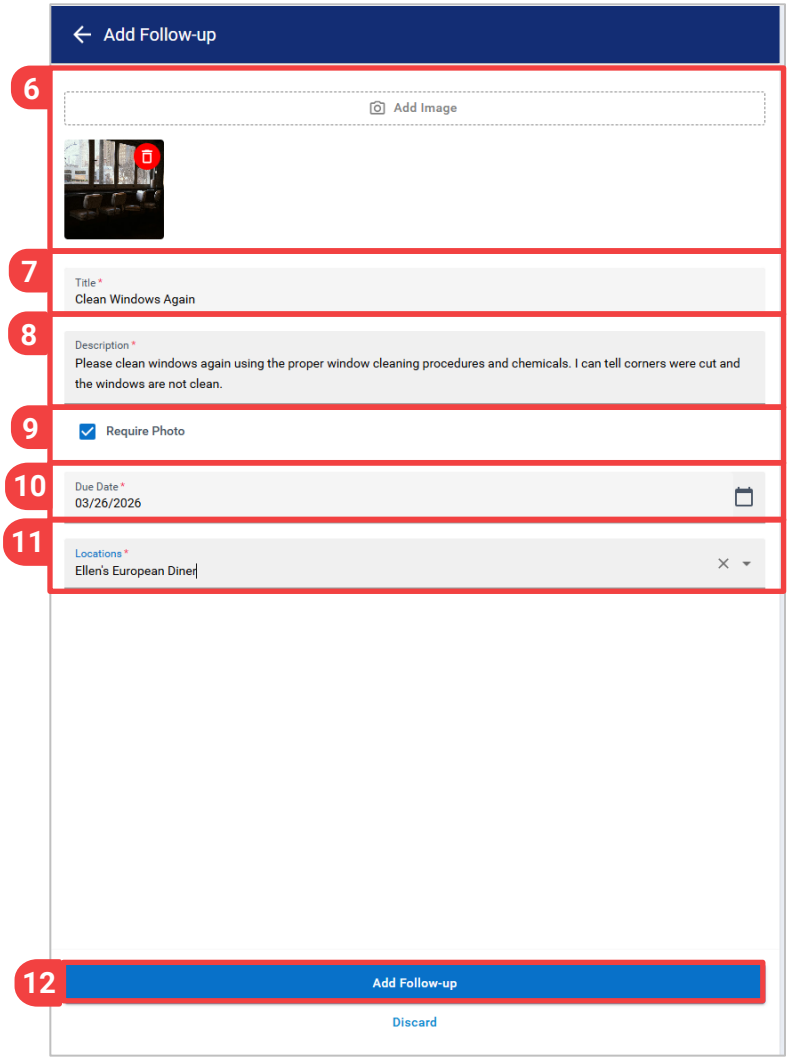
Ops Execution (Mobile) > Dashboard > My Forms > District Audit Lecter's > Add Follow-Up Action




6 First, add the photo taken during your audit by selecting *Add Image* and attaching the photo.

7 Next, give your follow-up action a *Title*. (Required)

8 Provide a detailed *Description* of the follow-up action. (Required)

9 If desired, check *Require Photo* to include proof the follow-up action has been completed.

10 Select the *Due Date* for the assigned follow-up action. The time will be at the end of the day for the date you select. (Required)

11 Assign the follow-up action to a specific *Location*. (Required)

12 When finished, select *Add Follow-up* to assign this action to the location.

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# Assign Follow-Up Actions in Forms

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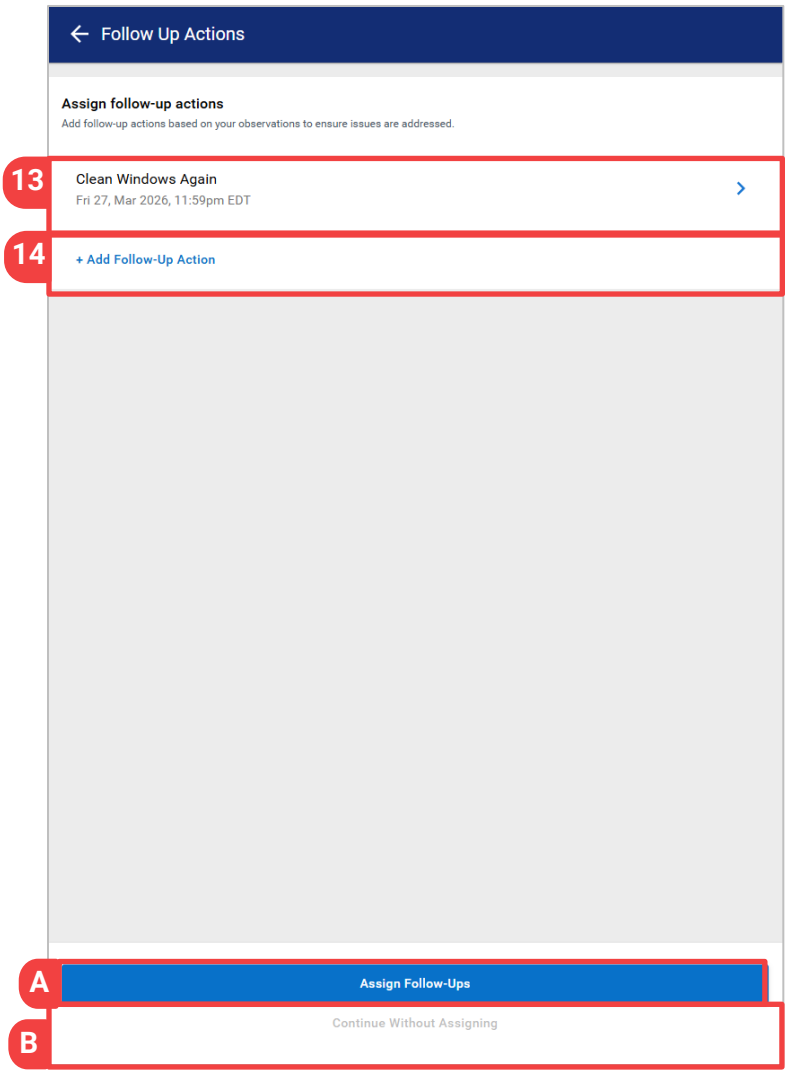
Ops Execution (Mobile) > My Forms > Assign Follow-Up Actions




13 This is the follow-up action you just created – *Clean Windows Again*.

14 Select **+** *Add Follow-Up Action* to create another follow-up action for this form.

15. Choose one of the following:

A Select *Assign Follow-Ups* to assign the follow-up actions to the location.

OR

B Select *Continue Without Assigning* to continue with the audit without assigning the follow-up actions.

**Alert:** If you exit the screen or select *Continue Without Assigning*, no follow-up actions will be created or assigned.

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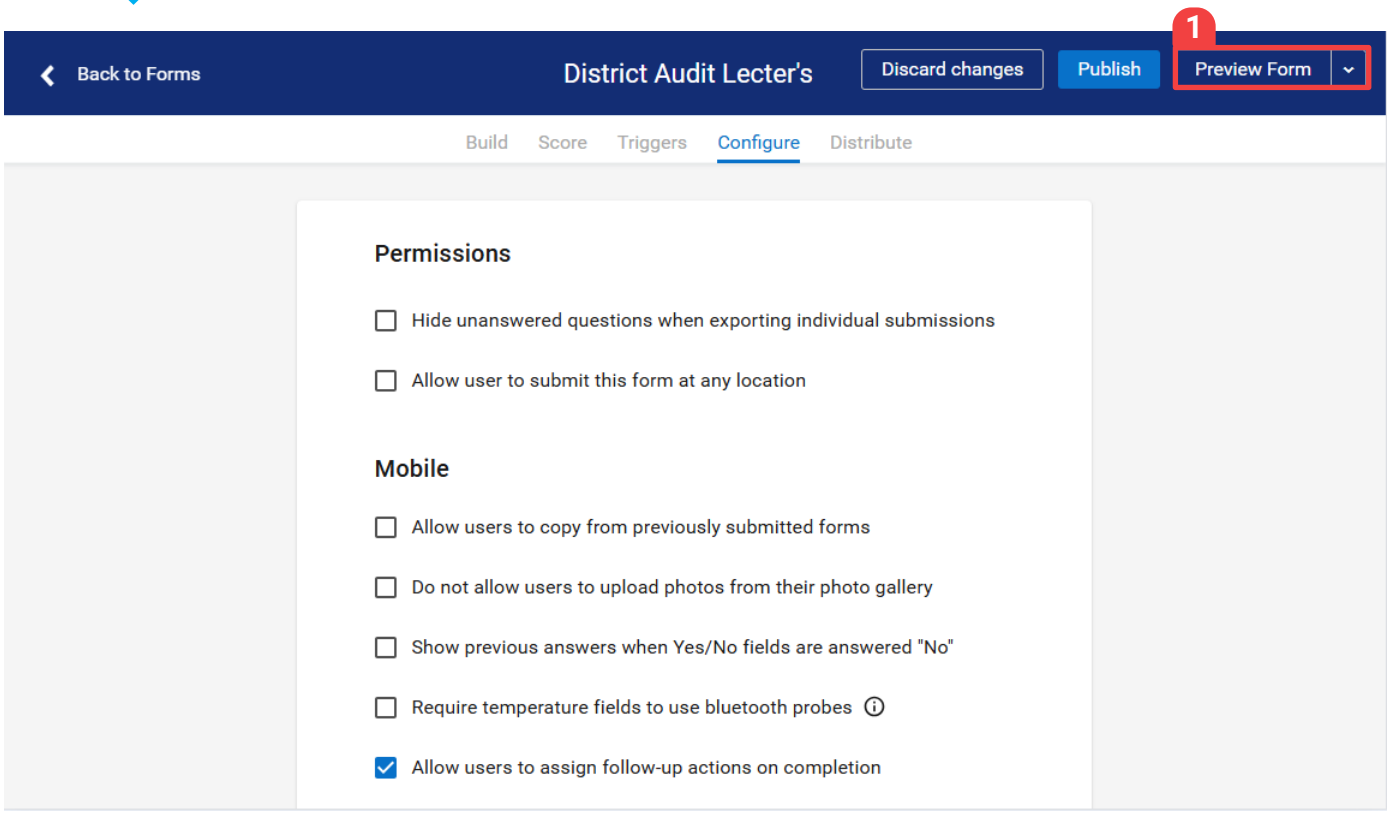
# Assign Follow-Up Actions from Form Preview (Web)

Ops Execution (Web) > Forms > Edit > Configure




1 Select *Preview Form*, to see your form preview and the option to create follow-up actions.

**Note:** By default, follow-up-actions are turned on for new forms. To disable follow-up actions, de-select this checkbox in the form configuration settings.

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# Assign Follow-Up Actions from Form Preview

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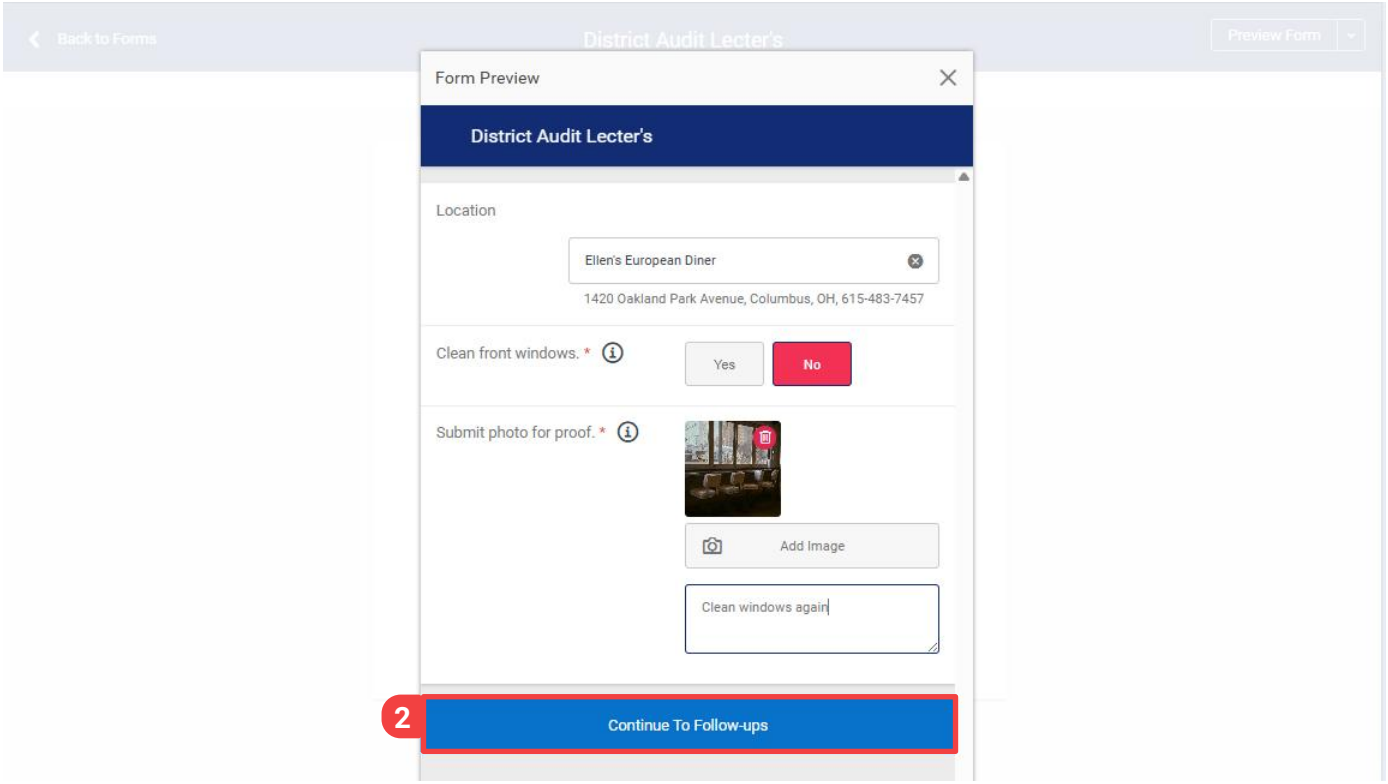
Ops Execution (Web) > Forms > Edit > Configure >Form Preview




2 For forms that have follow-up actions enabled, the *Form Preview* allows you to create and assign follow-up actions in the web app.

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# Assign Follow-Up Actions from Form Preview

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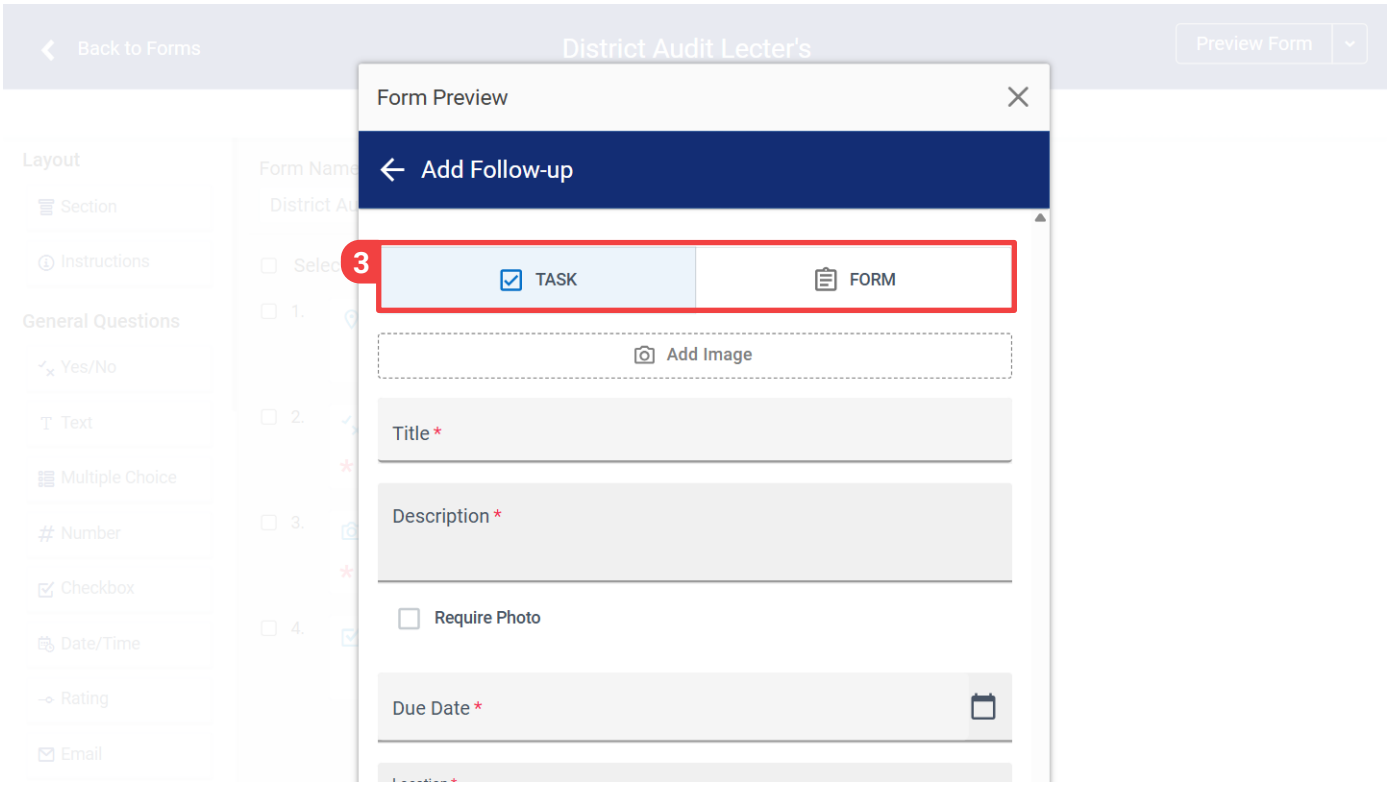
**Ops Execution (Web) > Forms > Edit > Configure >Form Preview > Add Follow-up**




3 Follow-up actions can be assigned as a *Task* or a *Form*. Assigning a pre-built existing form like a cleaning checklist is a great way to streamline follow-up actions and enforce brand standards.

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# Assign Follow-Up Actions from Form Submission

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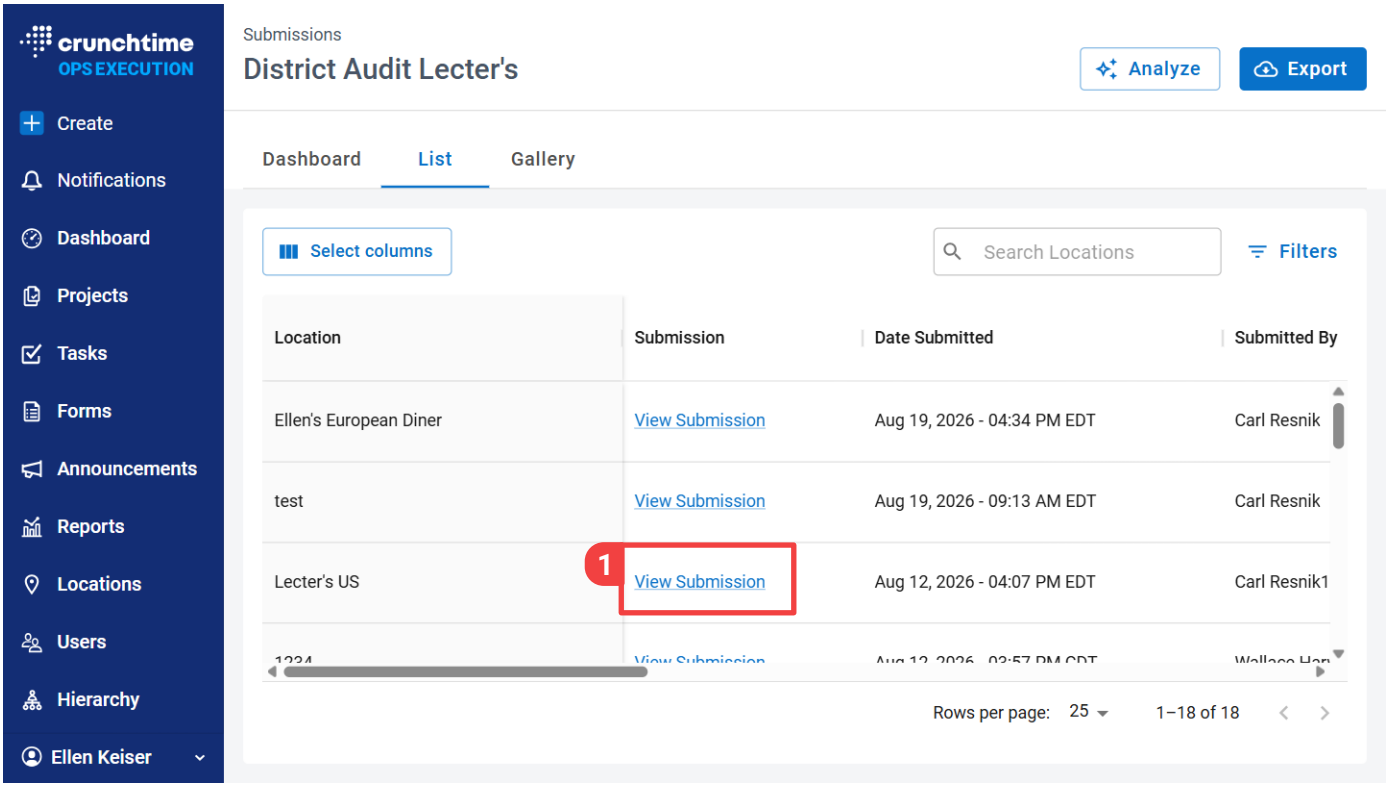
Ops Execution (Web) > Forms (or Reports) > Submissions > List > View Submission




1 From the Submissions *List* View, click on the *View Submission* hyperlink for the submission that needs additional corrective action assigned.

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# Assign Follow-Up Actions from Form Submission

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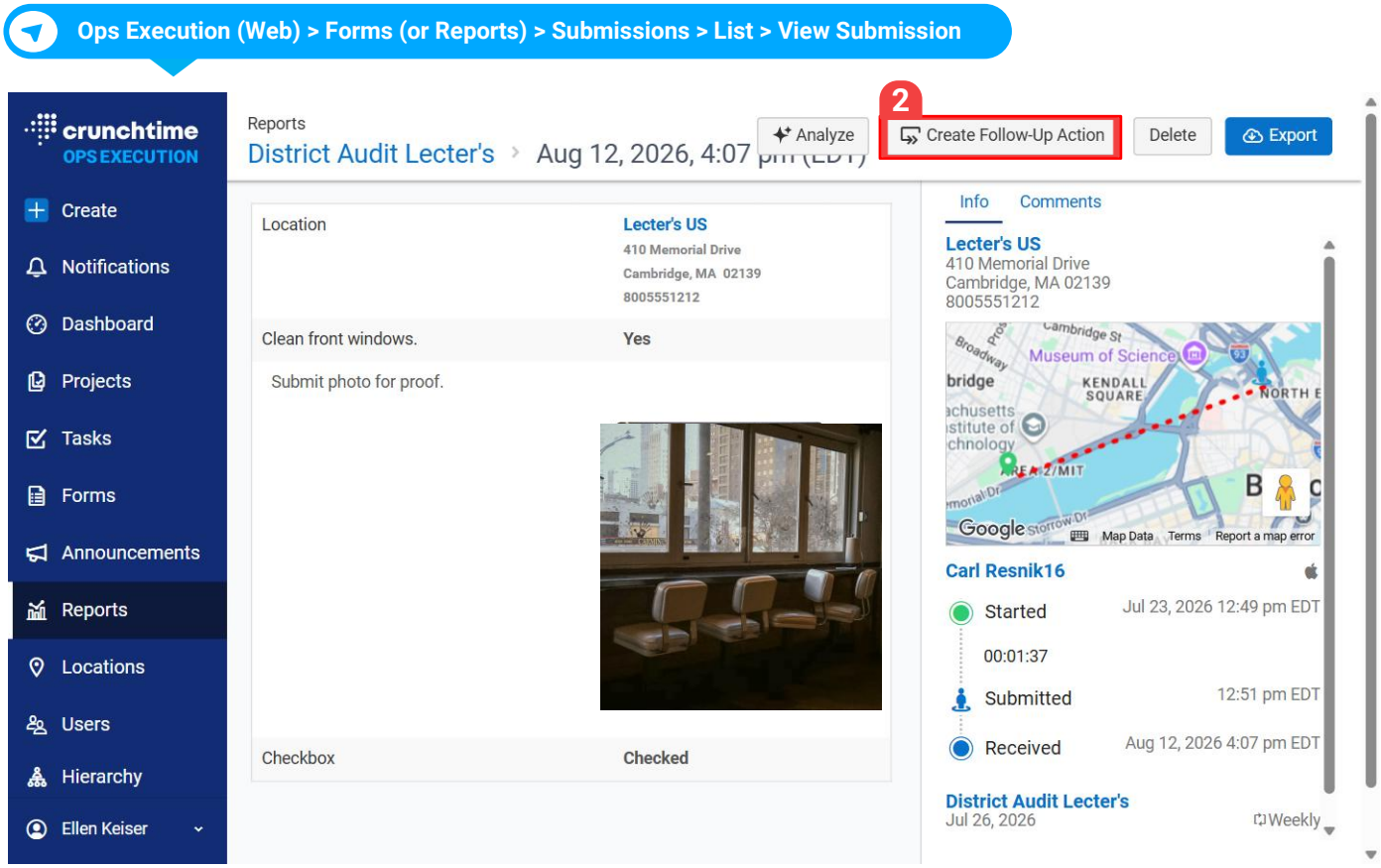


2 From the specific submission, select *Create Follow-Up Action* to assign further corrective action to this location.

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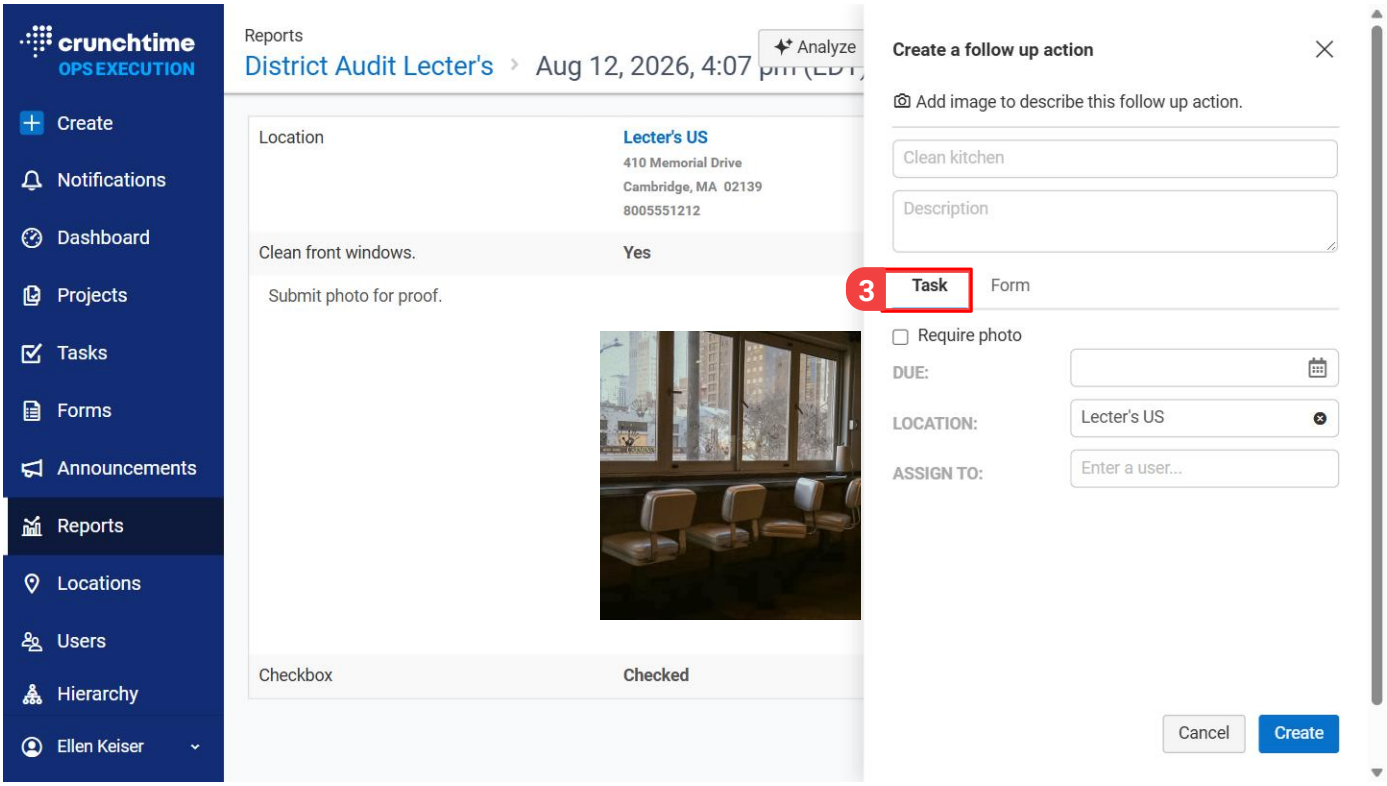
# Assign Follow-Up Actions from Form Submission

(Continued)

Ops Execution > Forms (or Reports) > Submissions > List > View Submission >Create a follow-up action >Task




3 Provide further instructions for your corrective action with a follow-up *Task*. Add an image to describe the follow-up task, a title and a description. Indicate if a photo is required, assign a due date, confirm the location and assign to a specific user (optional). Then select *Create* to assign the follow-up task.

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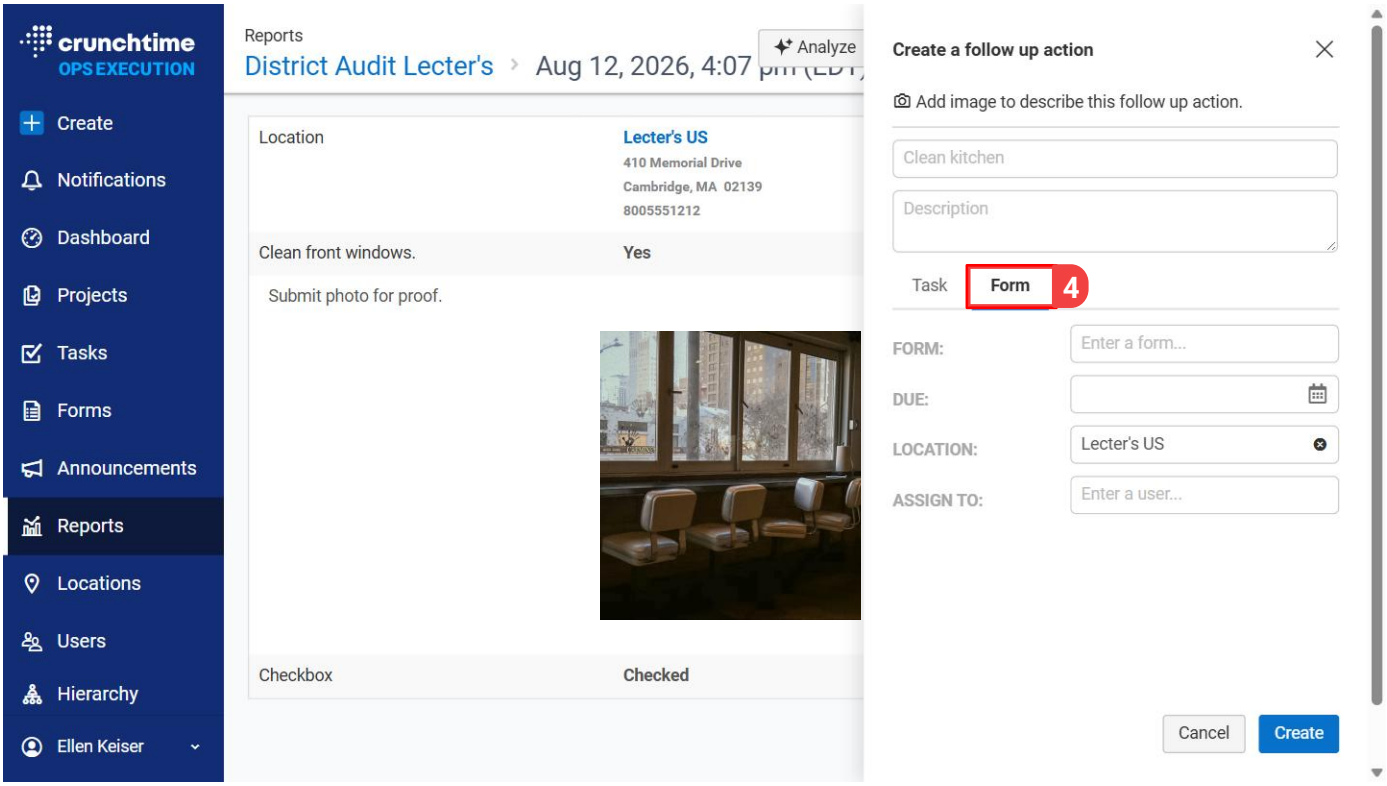
# Assign Follow-Up Actions from Form Submission

(Continued)

Ops Execution > Forms (or Reports) > Submissions > List > View Submission >Create a follow-up action >Form




4 Provide further instructions for your corrective action with a follow-up *Form*. Select a form from your pre-existing list of forms right from the dropdown menu. Assign a due date, confirm the location and assign to a specific user (optional). Then select *Create* to assign the follow-up form. Using a follow-up form allows you to use a pre-existing checklist as a follow-up to streamline follow-ups and meet brand standards.

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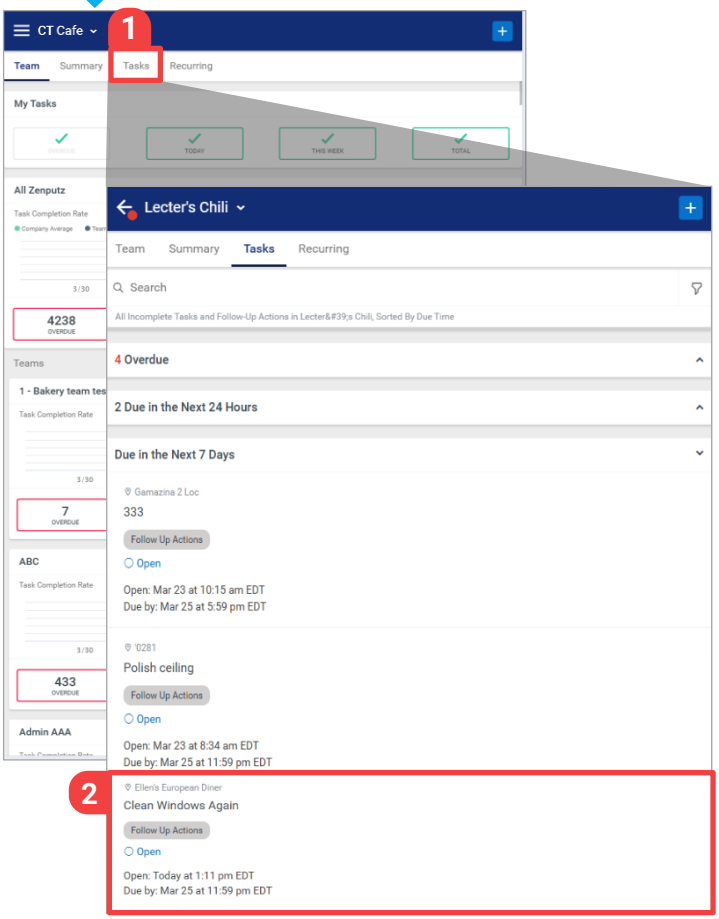
# Complete Follow-Up Actions at Location (Mobile)

Ops Execution (Mobile) > Tasks




1 From the mobile dashboard, select *Tasks* to see the follow-up actions and tasks assigned to your location.

2 Next, select *Clean Windows Again* to complete the assigned follow-up task before the due date.

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# Complete Follow-Up Actions at Location

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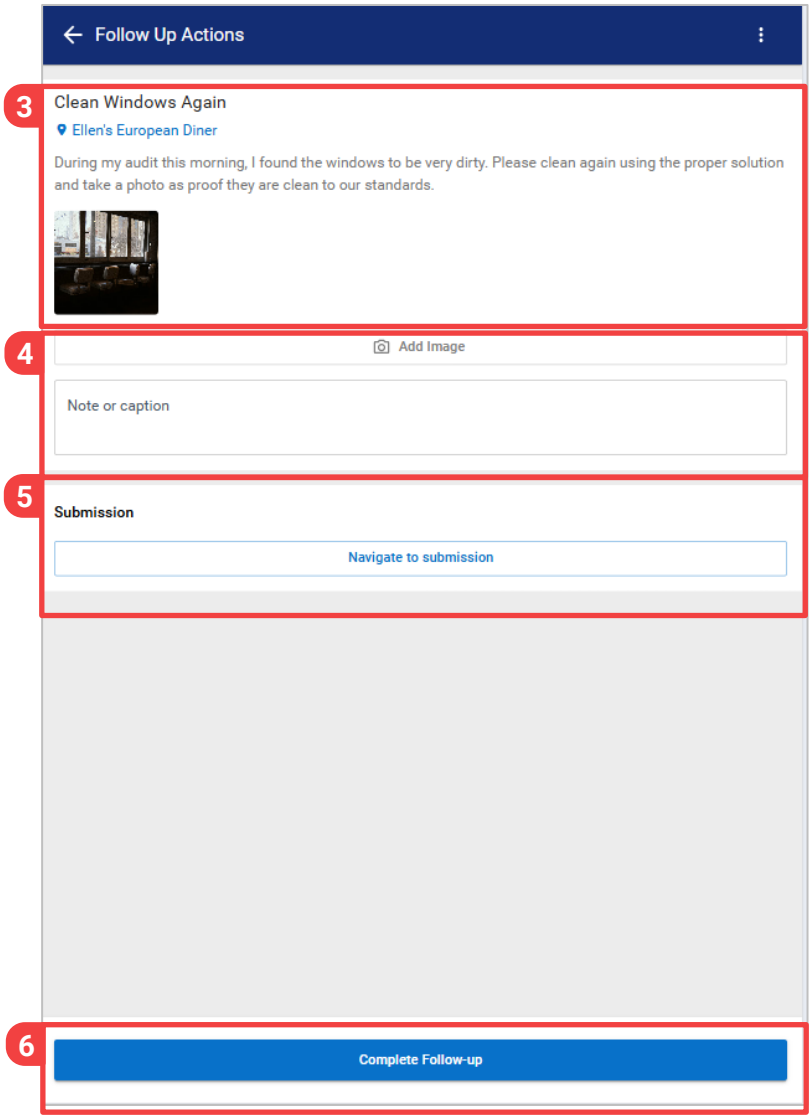
Ops Execution (Mobile) > Tasks > Follow-Up Actions




3 This is the follow-up action assigned during your above-store leader or manager's audit. Review the action or actions requested and then continue to the blue button below.

4 Here you'll *Add Image* and a *Note or caption* as proof you have completed the follow-up action and cleaned the window using the proper procedure.

5 At any time, you can select Navigate to submission to review the completed audit.

6 Select Complete Follow-up to submit the follow-up action for review.

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# Complete Follow-Up Actions at Location

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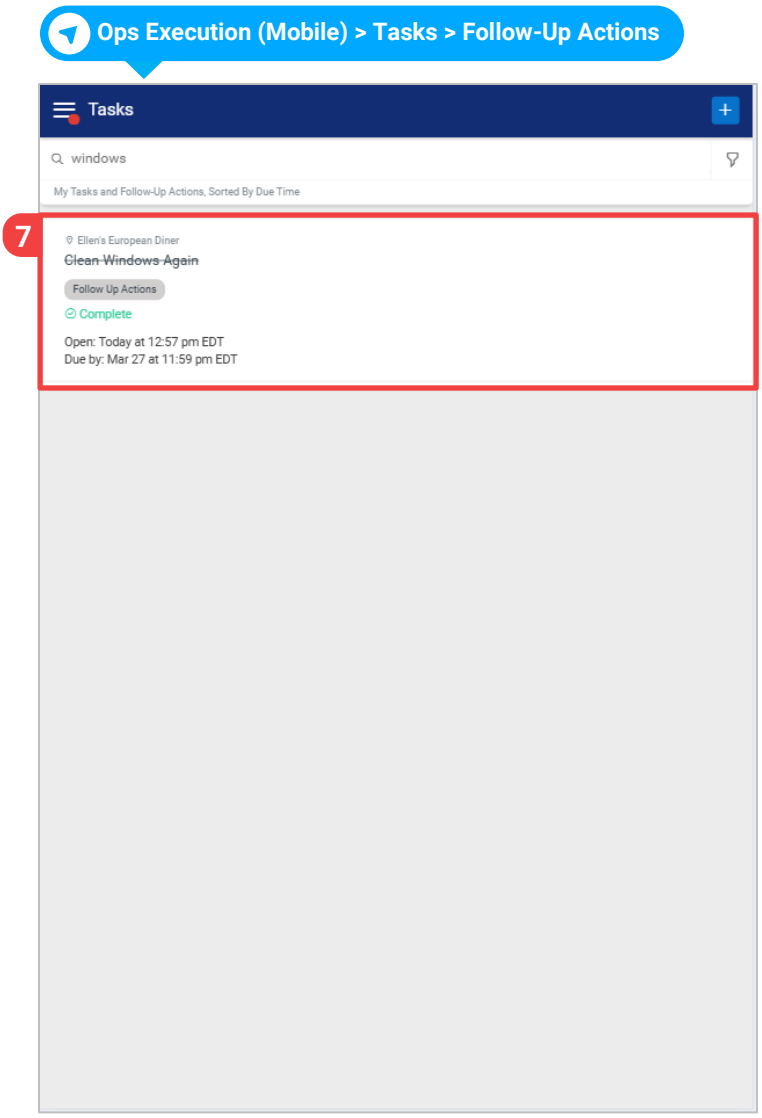


**7** When you return to your *Tasks* page, the follow-up action now shows as *Complete*. All tasks and follow-up actions on this page are sorted by Due date/time.

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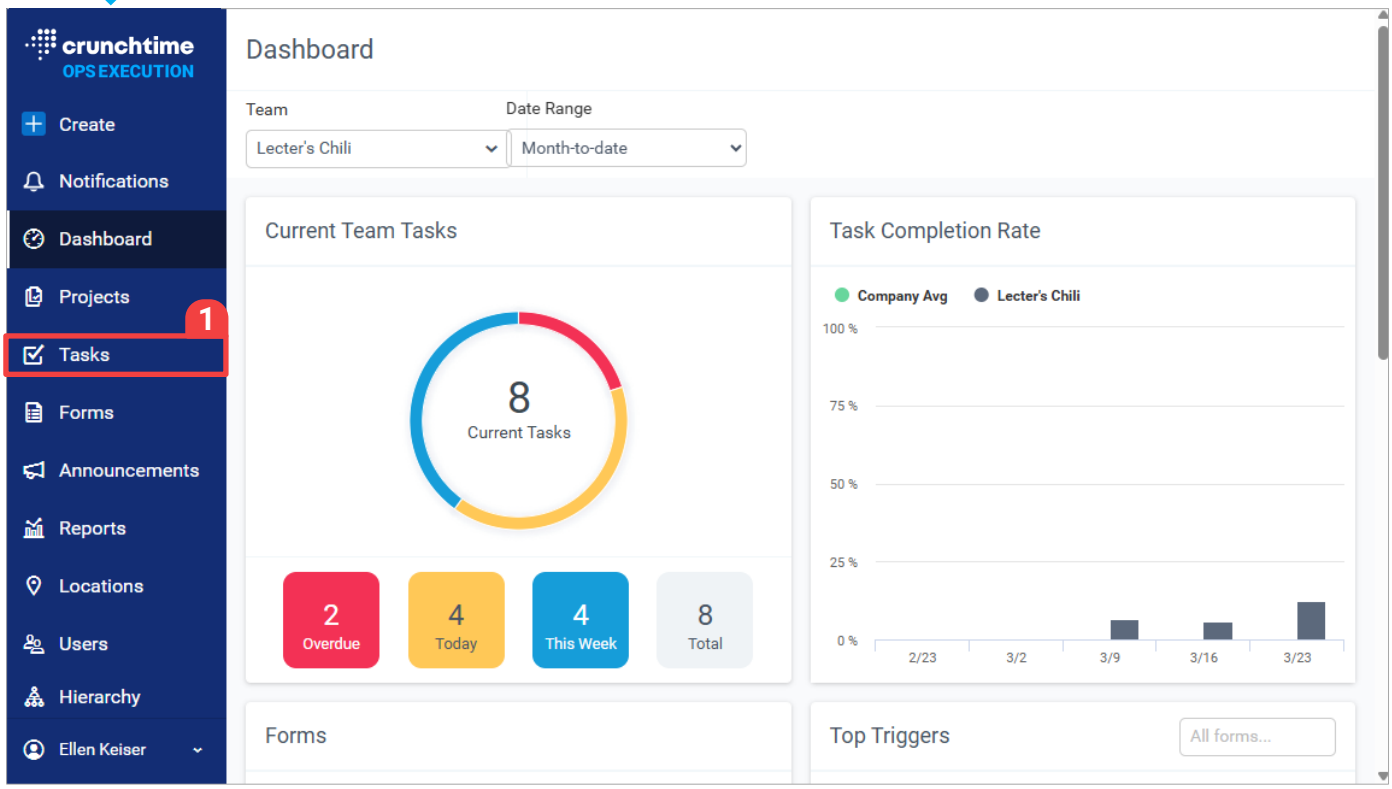
# Track Follow-up Actions under Tasks (Web)

Ops Execution (Web) > Dashboard




1 On the Dashboard, select *Tasks* from the menu panel.

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# Track Follow-up Actions under Tasks

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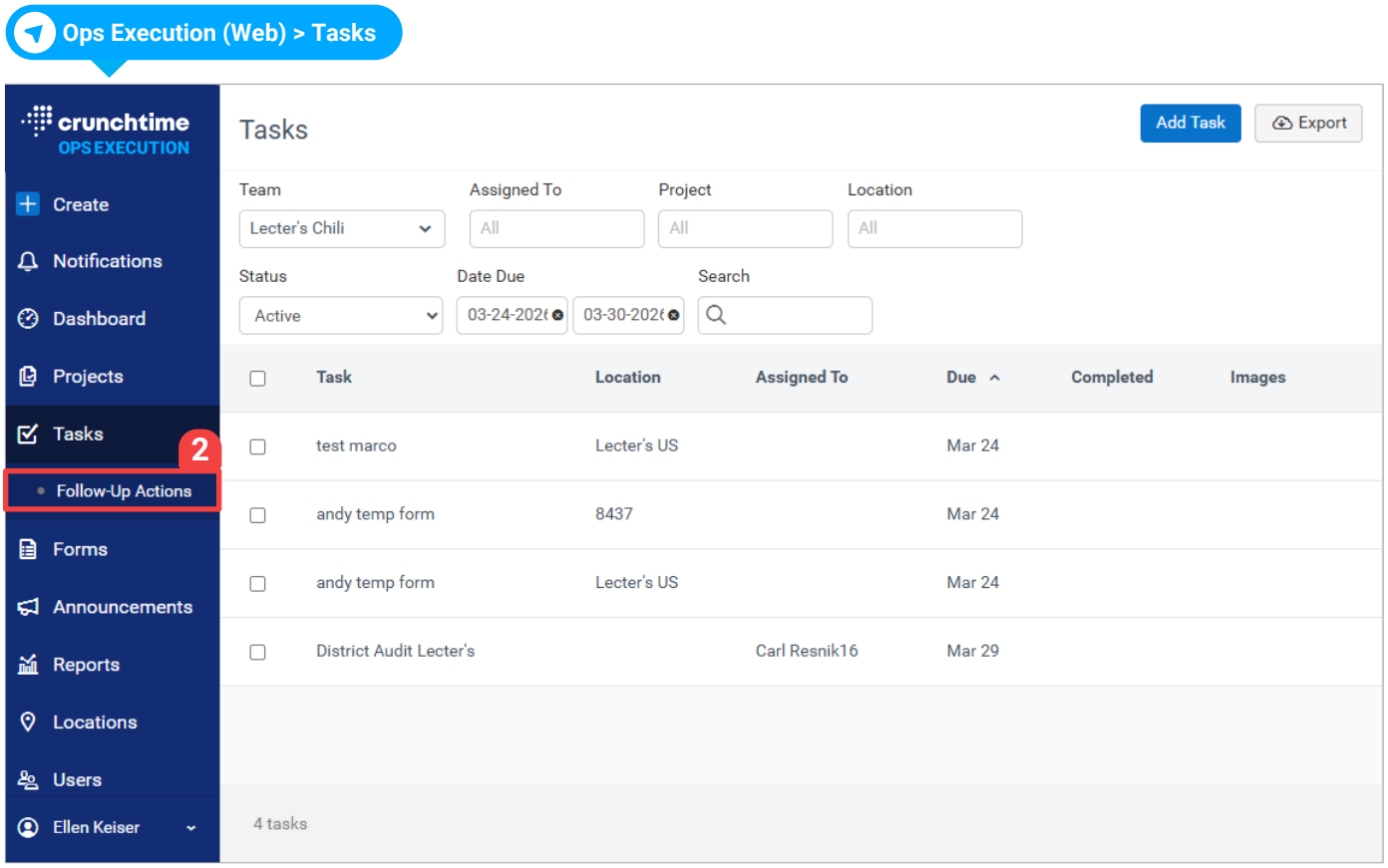


2 Under Tasks, select *Follow-Up Actions*.

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# Track Follow-up Actions under Tasks

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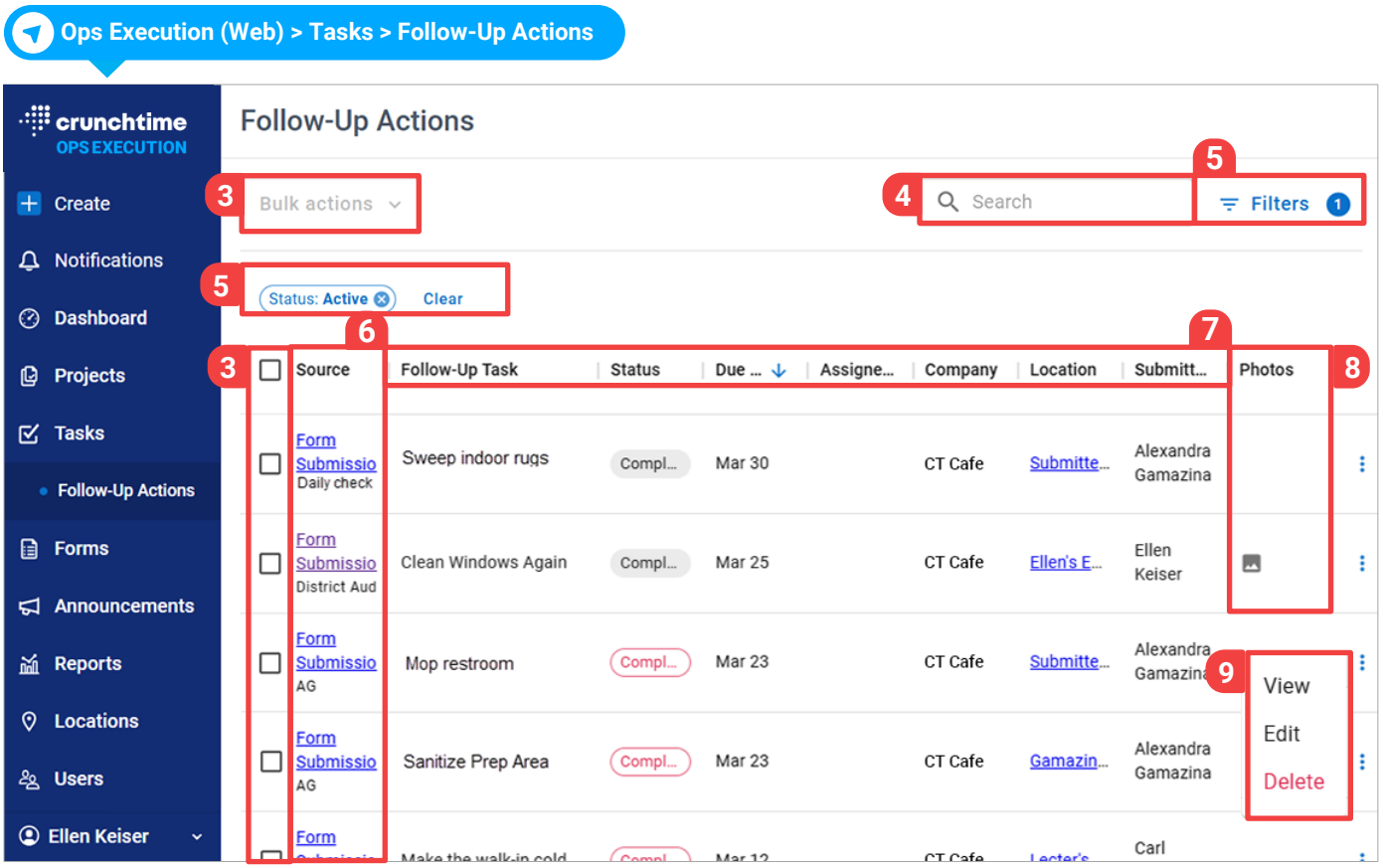


3 **Bulk Actions:** Use the checkboxes next to each follow-up action to multi-select follow-up actions you want to edit or delete.

4 **Search:** Use the search bar to quickly and easily search all follow-up actions by keyword.

5 **Filters:** Select *Filters* to open the filters menu.

6 **Source:** Click the link to view the original submission that created the task.

7 **Progress:** To sort by column, select the column name (Follow-Up Task, Due Date, Company, Location, or Submitted By.

8 **Visual Proof:** Review attached images to verify the quality of the photo submitted.

9 **Admin Updates:** Click the *three dots* icon to the right of the form to *View*, *Edit* or *Delete* the follow-up action.

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# Track Follow-up Actions under Tasks

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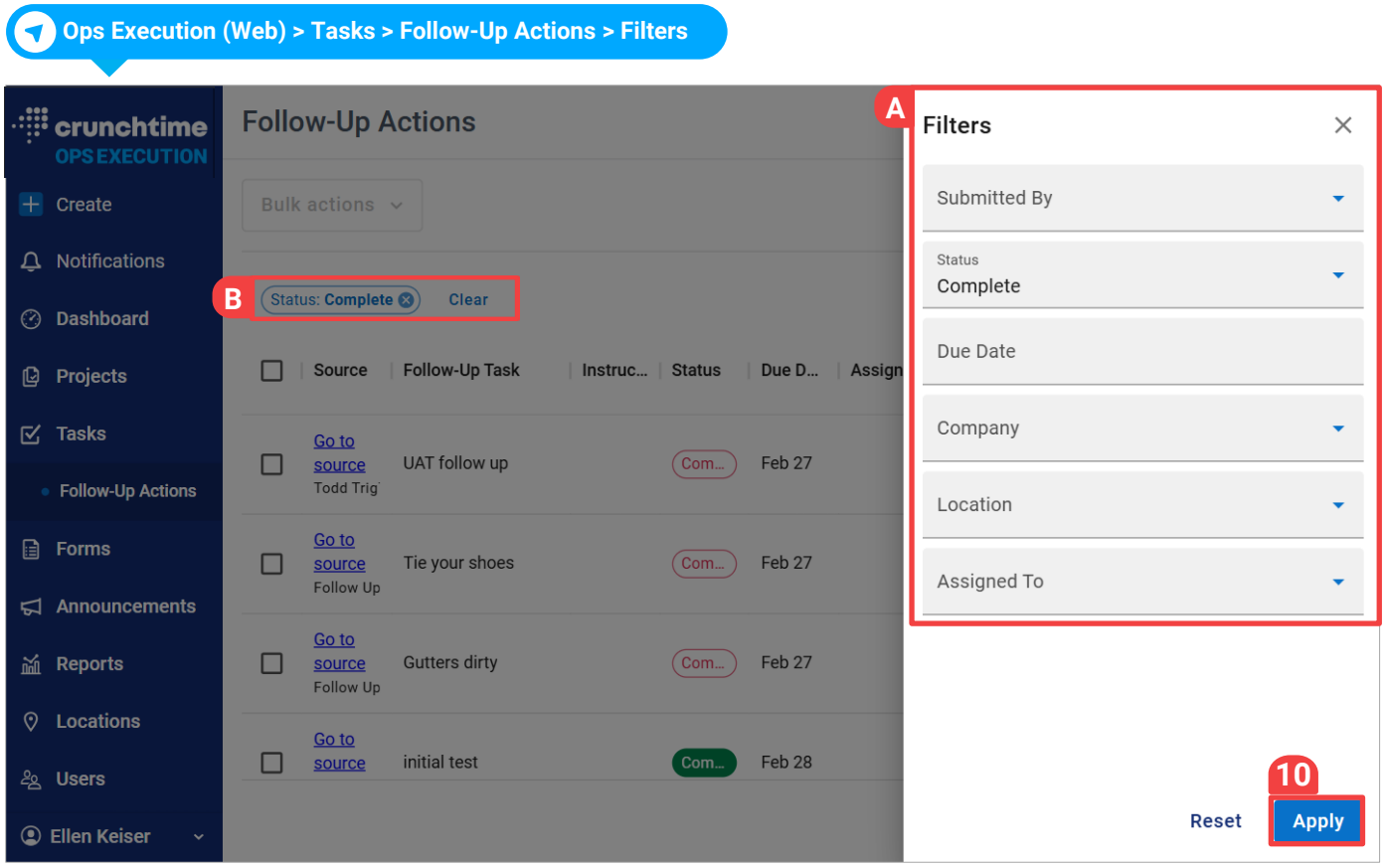


9. Here are 2 filter tools to indicate which ones have been selected

   **A** Use *Filters* to filter by *Submitted By, Status, Due Date, Company, Location*, and/or *Assigned To* to find specific follow-up actions quickly.

   **B** Any filters selected will show as filter chips on the main follow-up actions page so selected filters show at all times. Select *Clear* to clear all filters at the same time.

**10** Once you've selected your filters, select *Apply* to generate the filter results and any additional filters applied or removed will appear or disappear as additional filter chips.

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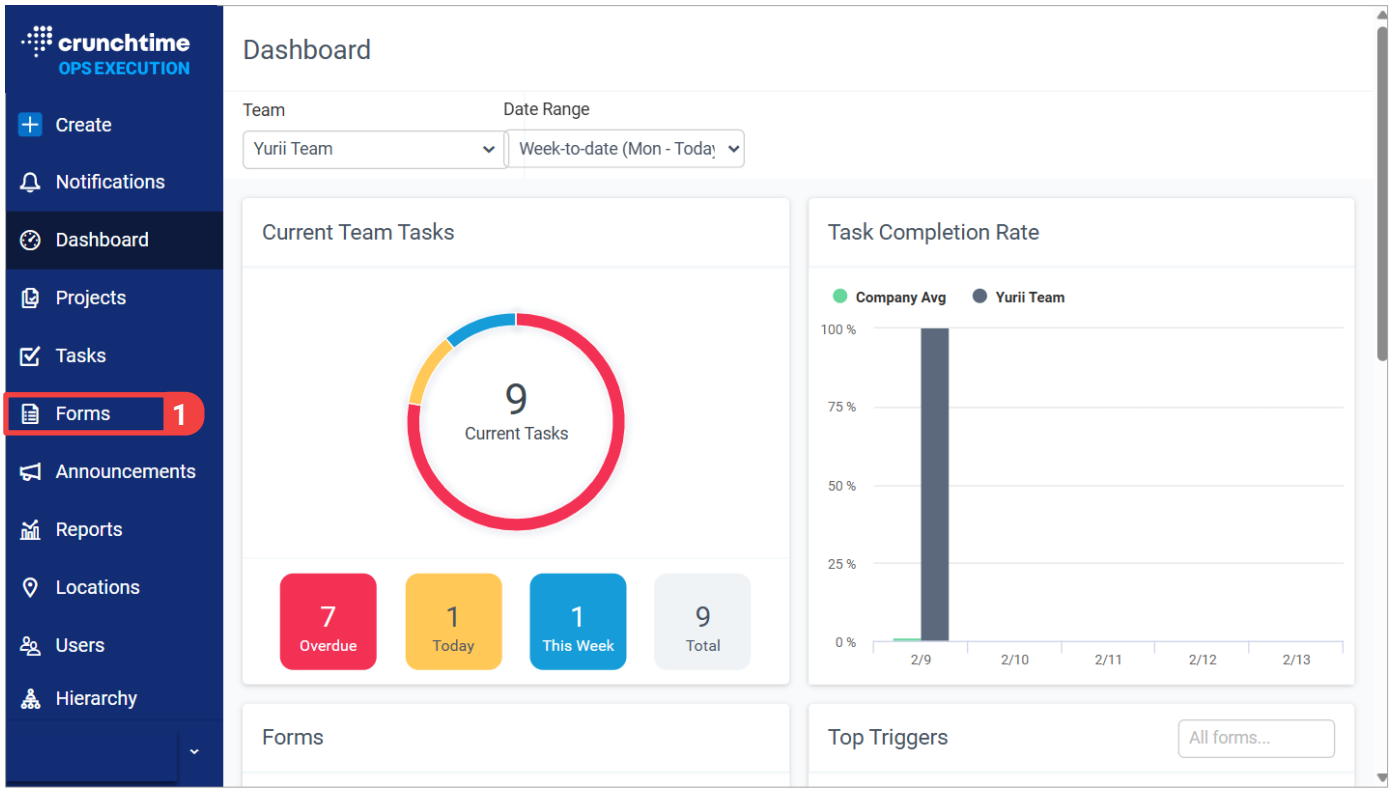
# Disable Follow-up Actions in Forms (Web)

**Ops Execution (Web) > Dashboard**




1 Follow-up actions are turned on by default for every form. If you prefer to have follow-up actions turned off, you will need to configure the form to disable them. On the Dashboard, select *Forms* from the menu panel.

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# Disable Follow-up Actions in Forms

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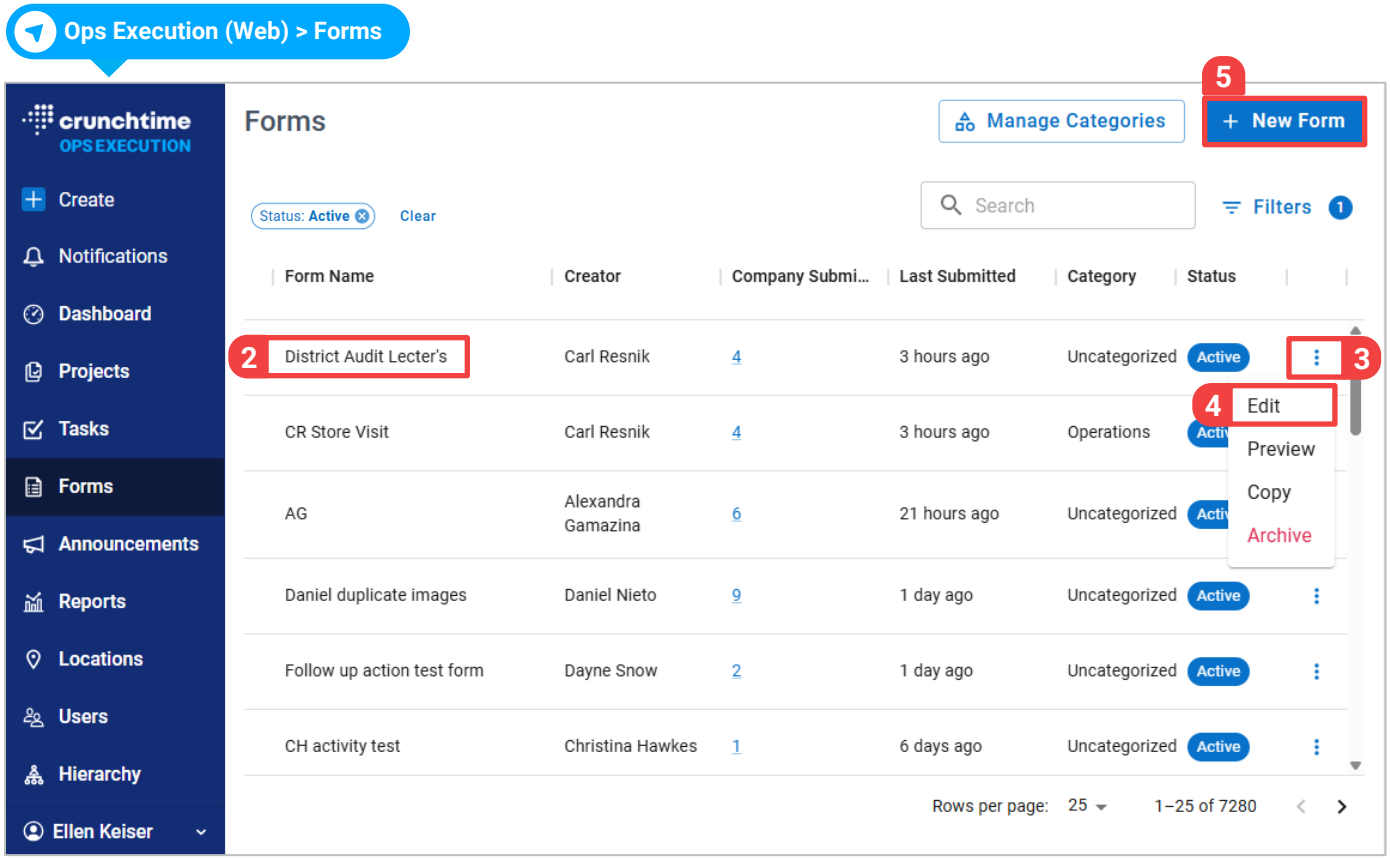


2. **Choose your form:** Find the form you would like to disable with follow-up actions.
3. **Open form options:** Click the three dots icon to open the options menu.
4. **Choose Edit:** To open the form for which you'd like to disable follow-up actions, select Edit from the dropdown menu.
5. **New Form:** To disable follow-up actions for a new form, select New Form and follow the same steps.

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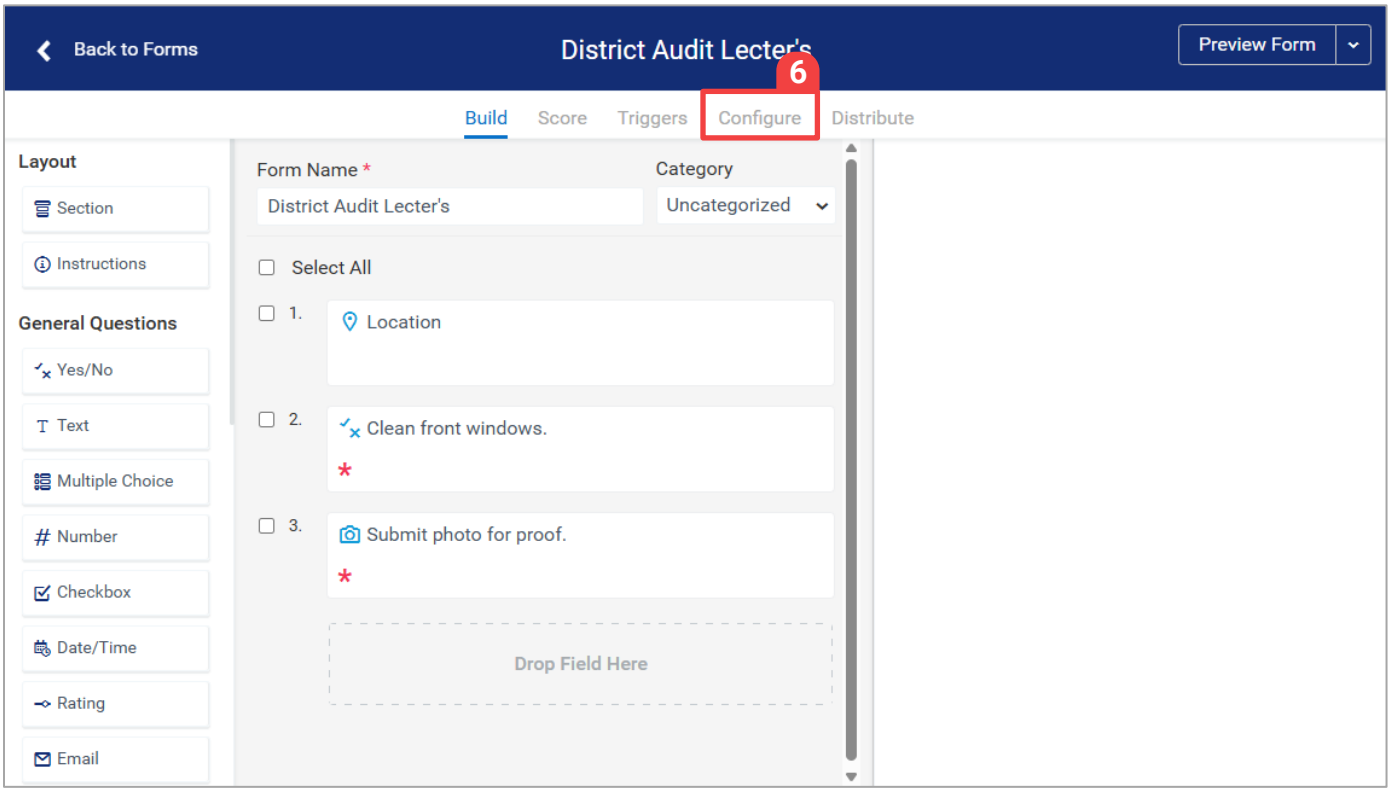
# Disable Follow-up Actions in Forms

(Continued)

Ops Execution (Web) > Forms > Edit > Configure




6 **Configure:** Follow-up actions are turned on by default for every form created, so action needs to be taken if you want to disable follow-up actions for a particular form.

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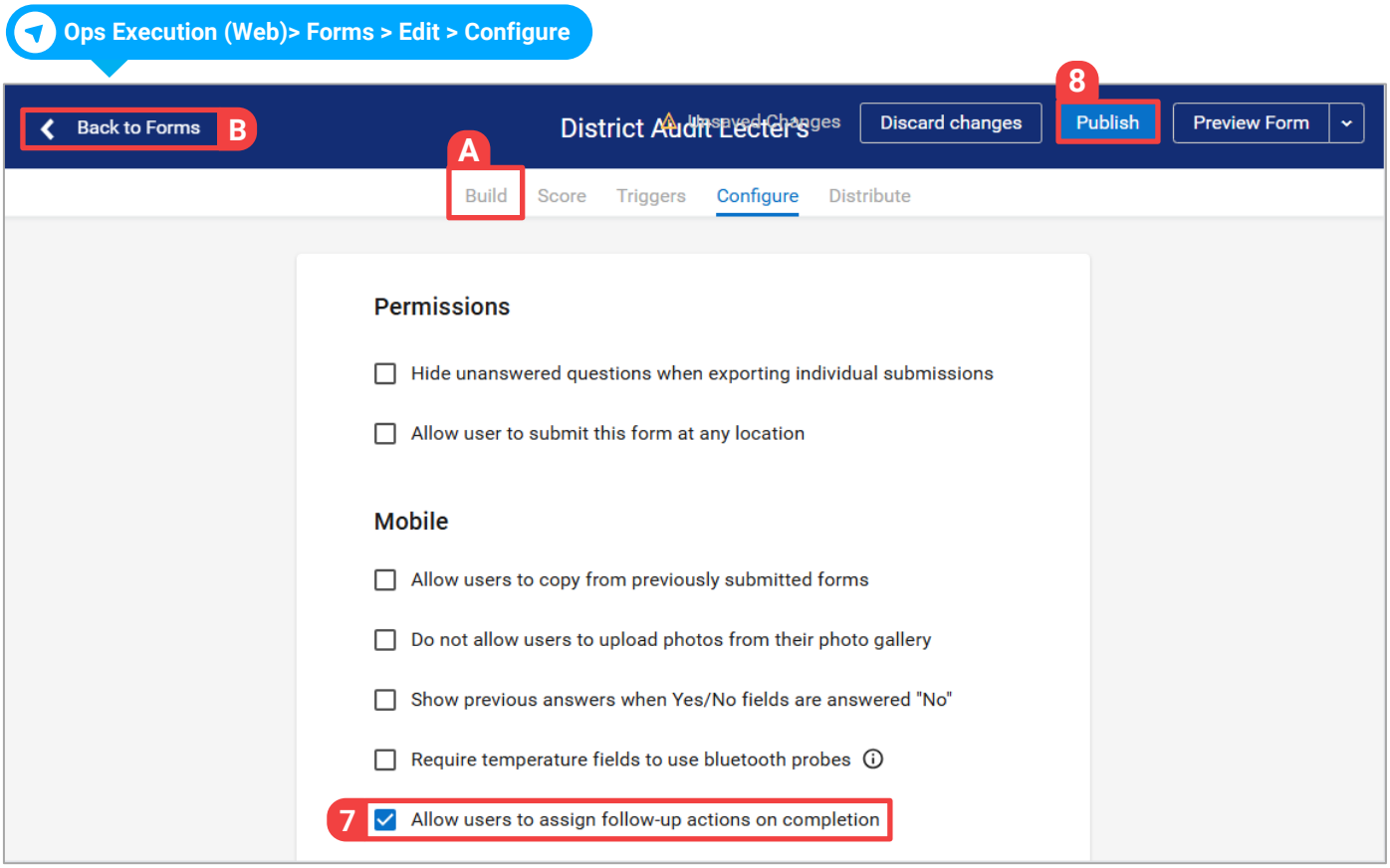
# Disable Follow-up Actions in Forms

(Continued)




7 **Disable follow-up actions:** Uncheck the box to *Allow users to assign follow-up actions on completion*.

8 **Publish:** Select *Publish* to save your changes and publish a new version of the form with follow-up actions disabled.

9. Choose one of the following options:

   A **Back to Forms:** Select *Back to Forms* to return to the *Forms* page OR

   B **Return to Form Build:** Select *Build* to continue working on your form.

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