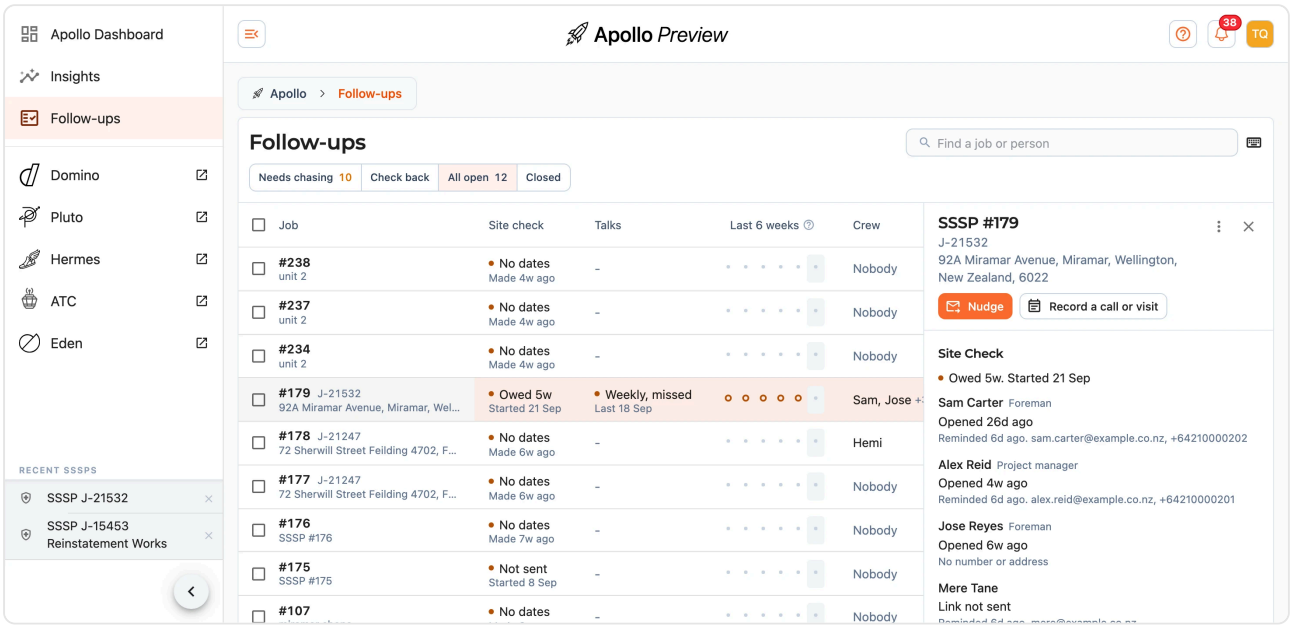
Follow-ups

EST. 8 MINUTE READING TIME

Apollo Follow-ups is a sheet of every open SSSP, plus every closed one you have not dismissed yet, for keeping on top of the jobs that still owe a site check or a toolbox talk. Each row shows where the site check stands, how the talks are going against their cadence, who is on the job and whether they replied, the last follow-up and when you said you would look at it again. It is built so you can chase a crew, record a call and read what came back from site without opening each SSSP. Anyone who can open the Apollo dashboard can open it, here:

- https://eden.samconsulting.co.nz/apollo/follow-ups



The Follow-ups sheet with one SSSP open in the side panel.

The Views

The sheet opens on **Needs chasing**, which holds the jobs that owe a site check or a toolbox talk (due or missed) and that nobody has followed up in the last two working days, plus any job whose check-back date has arrived. A follow-up is a nudge you sent, a call you recorded, an automatic toolbox reminder or a site check invite, so a job the reminders texted this morning stays off the list until two working days have gone by. Weekends and public holidays do not count towards the two days. **Check back** lists the jobs with a check-back date still to come, soonest first, **All open** lists every open SSSP and **Closed** lists the closed ones you have not dismissed. The search box matches the SSSP and Fergus numbers, the address, the people on the job and your notes. The newest SSSPs come first until you press a column heading, and a third press on the same heading puts that order back.

Each row says where things stand in a few words with an age: `Owed 5w` for a site check five weeks overdue, `Weekly, missed` for talks behind their cadence, `Text 2d ago` for a job you nudged by text two days ago. Only a value that needs you carries the small orange dot. Hover over a value, or press it on a phone, for the detail behind it: who filed each site check, the cadence and the last talk, where each of the crew stands, or who a follow-up went to and who sent it. Press a column heading to sort by it, and press `Add a note` (or the note itself) to write the line you would otherwise keep in a spreadsheet, which saves when you press `Enter` or click away.

The **Last 6 weeks** column shows the same six weeks on every row, ending with this week. A square is a site check filed, a dot is a toolbox talk held, an orange ring is a week the cadence asked for a talk and none was recorded, and a short line under a week means you nudged the job that week. Reading down the column shows a bad week across all your jobs

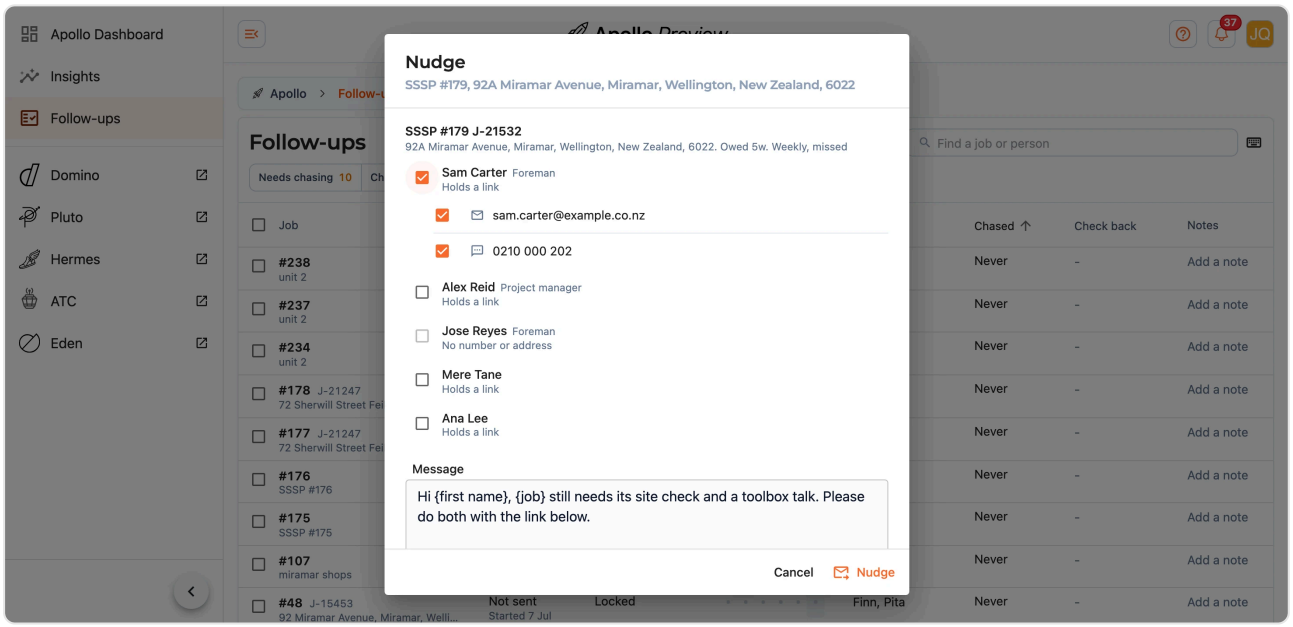
at a glance. The help icon beside the heading explains the marks, and hovering over a week names who filed what that week, or says nothing happened.

The Side Panel

Press a row to open its SSSP beside the sheet, or over it on a smaller screen. The panel lists everybody on the job and where each of them is at on the site check (sent, opened or filed), when the automatic reminders last reached them, whether their last text was not delivered, and anything they have replied by text or email since you last chased them. Below that are the toolbox talks, the records filed so far (press one to read it), the **Follow-up** section with your check-back date and note, and the **History** of every follow-up and visit on the job.

Nudging the Crew

`Nudge` sends a text and an email to the people you tick, each carrying their own site check link, which also opens the toolbox talk recorder. Nobody starts ticked. Ticking a person ticks all of their numbers and addresses, and you can untick any you do not want to use. A person shows when the automatic reminder texted them today, so you can see whether another text is worth sending.



Nudging the foreman on one SSSP by text and email.

One message goes to everybody, and `{first name}` and `{job}` in it are filled in for each person (the job reads as its Fergus number and street, for example `J-21532 92A Miramar Avenue`). The message starts with wording for whatever the job owes, which you can change. The preview shows the text as the first person you ticked will receive it, with your name as the sign-off, and how many texts it runs to. Sending sets the job's check-back date two working days ahead unless you change or clear it. A reply by email lands on the SSSP's comments, and a reply by text shows in the side panel and still arrives in ATC.

To nudge several jobs at once, tick their rows and press `Nudge` in the bar above the sheet. The dialog then lists the people on each job, and the one message is filled in for each of them.

Note: an SSSP that has never been sent to site cannot be nudged. Its first send goes through `Send to Site` in the builder, which chooses between the brief and the full site check and puts the checklists on the Fergus job, so the panel offers `Open SSSP to send` in its place.

Recording Calls and Visits

`Record a call or visit` records a call, a site visit or an audit against the job, with when it happened (now unless you change it), an optional note and the next check-back date. A recorded call counts as a follow-up, so the job leaves Needs chasing for two working days, and the latest site visit shows under the Last follow-up value on the row. If you record something by mistake, press the bin beside it in the History to remove it. Nudges and automatic reminders stay, because they record texts and emails that went out.

Locking Talks, Closing Out and Dismissing

The ⋮ menu on each row, also at the top of the side panel, holds the rest. `Lock Toolbox Talks` stops the reminders on a job that no longer needs talks, as it does in the builder, and `Close out SSSP` records how the job ended and takes it off every outstanding list, as described under Closing Out. A closed SSSP stays on the **Closed** view until you press `Dismiss`, and if it is reopened and closed again it comes back.

Working on Several SSSPs

Tick the rows you want and the bar above the sheet offers what can be done to all of them at once: `Nudge`, `Lock talks` or `Unlock talks`, `Close out` or `Reopen`, `Check back`, `Record`, and `Dismiss` where every ticked SSSP is closed. Lock and close out only show when every ticked SSSP is in the same state, so a mix of locked and unlocked SSSPs offers neither. On a phone the bar sits at the foot of the screen, and everything but `Nudge` is under ⋯.

Locking, closing out and reopening ask first, naming how many SSSPs they will change and listing them, and apply the reason or outcome you choose to each one. If some SSSPs could not be changed, the dialog stays open and names each one with the reason, and the rest are done. `Check back` sets one check-back date on every ticked SSSP, or clears it from all of them, and `Record` adds the same call, visit or audit to each.

Keyboard Shortcuts

On a computer, the sheet can be run from the keyboard. The ⌨ button beside the search lists the keys:

- `Up` and `Down`, or `K` and `J`, move between rows.
- `Enter` opens the row in the side panel, and `Esc` closes it.
- `X` ticks the row.
- `N` nudges the ticked rows, or the row you are on.
- `L` records a call or visit on the row you are on.

If a job is missing from the sheet, or a nudge did not reach somebody, let us know at support@samconsulting.co.nz.