



CHANGING STATUSES IN DOLI

The status of a job is updated to trigger an action on the part of our business or to alert the user of the next action. RC agents are expected to ensure the status is correct for the situation at the end of each call or job touch – Don't Leave It; Fix It

Each status has multiple "comments" for agents to accurately select a reason the status was updated. Please note that not every status is available for all clients.

Scheduled:

*****Note: Servicers will ONLY act on orders in a 'Scheduled' status*****

Accepted: Servicer accepts job the day of appointment to indicate he will be rolling. You speak to the servicer the day of the appointment and he confirms he is rolling on the job.

Action Needed: Used when the servicer updates the order in the CRST Home Solutions Mobile App and there is a problem with the order, such as no equipment at pickup or onsite issues.

Equipment Received: Used when the servicer updated the job in the CRST Home Solutions Mobile app or Smart Action. This means the equipment has been picked up from the client.

ETA Provided: Used when the servicer updated the job in the CRST Home Solutions Mobile app or IVR and provides the customer an ETA.

On Site: Servicer is at the customer's home

In Route: Servicer is in route for the day. This does NOT indicate the customer is next.

No Comment: Indicates the job was accepted in DOLI. Order is scheduled to an CRST Home Solutions Vendor

Confirmed: Servicer confirmed the job in DOLI

By Installs, inc: Order was scheduled in DOLI

Dispatched: DOLI flips the order to this status 12 hours before the appointment.

Prescheduled:

Assigned: Order is not scheduled, but it is assigned to a company, normally the primary. Lowe's orders are a waiting on a permit.

Rejected: Flip job to this status when a servicer rejects a job.



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Unscheduled

Waiting Ship Notification: Used when CRST Home Solutions receives an order from the client, but the equipment is not yet available for pickup. Lowe's Orders – do not schedule unless the client confirms product availability.

Waiting Client Action:

No Equipment: Flip to this status when the product is not available at pick up or when there is a Wrong/Damaged/Defective product.

No Contact With Customer: Used when we are not able to reach the customer due to a wrong or disconnected phone number

Problem With Order: Used when there is a problem with the order that we need the store to fix.

Waiting Customer Action:

Called Cust Left Message (1st; 2nd; 3rd attempt): Use when you call the customer and leave a message. Progress through the number of attempts.

Customer Request Delay: Used when the customer requests the order be delayed. Used for a Site Not Ready situation. Set a call back date of 7 business days in the future or when the customer states to call him/her back.

Customer Not Home: Use this when we go onsite and the customer is not home.

Pending Payment: Used when CRST Home Solutions set up an order for the customer, but we are waiting for successful payment via a Payline invoice. Do not schedule jobs in this status without first verifying payment in Payline.

No Equipment: Use when a piece of equipment that the customer is responsible for providing is missing.

Other Delay - see note: (Phone 1 should NOT use this status) Used any other time we are waiting for the customer to get back to us. Set a call back date of 1 week (7 days) in the future or when the customer states to call him/her back.



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Completed:

Pending Verification: When the order is completed out using the CRST Home Solutions Mobile App or IVR. The job has been performed, but the paperwork must still be submitted to CRST Home Solutions.

Completed Per Customer: DOLI flips the order to this status when the follow up questionnaire is completed

Complete Per SOW: Used when a job is completed onsite by the servicer

Delivery Only: Use this status when the customer cancelled the services, but requests the product be left onsite.

Need Installs Action

Bad Phone Number: Servicer will put the job in this status if the numbers on the order are incorrect or out of service.

Declining Job - see notes: Servicer will put the job in this status if he is declining the job. He will then notate the reason he is declining the job.

Cancelled:

Cancelled at Door: Used when the servicer arrives onsite and customer requests the order be cancelled.

Per Client: Client cancelled the order.

Duplicate Order: Use when you have confirmed with the store that an order is a duplicate.

Per Customer's Request: Customer asks to cancel the order. Direct the customer to the store for a refund. Agents must refund the customer when CRST HOME SOLUTIONS processed a payment (covered on Training Day 4).

Note: Agents are expected to confirm with the customer that they do not want the services prior to cancellation. Customers may want to cancel their appointment but reschedule for a future date.



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Self-Installed: Use this when the servicer gets onsite and the customer has already completed the install himself.

Note: Some clients have specific statuses that are only used by that one client. Consult WorkFlow to know which client processes use the client specific statuses.