

# Scheduling

- All initial appointment scheduling and rescheduling to different dates and/or arrival windows for Home Solutions orders should be processed by Home Solutions.
- If Home Solutions needs to reschedule to a new date or time, we must contact the customer to confirm the change. We can leave a message with the new date and time, if the customer doesn't answer.
- **Servicers should not reassign a job to a different date or time; they should call Home Solutions Resolution Care Department.**

## Standard Arrival Windows

- Home Theater: 8am – 12pm (AM); 12pm – 5pm (PM); 5pm – 9pm (PM)
- Appliance Installations: The servicer calls the customer the night before the scheduled appointment to provide a 3-hour arrival window.
  - DOLI will display as 8am-5pm, but NEVER tell the customer this time
- PC: 2-hour arrival windows; 8am-10am; 10am-12pm; 12pm-2pm; 2pm-4pm; 4pm-6pm
- **Exceptions**
  - Best Buy AI and CE: Routing windows of 7 - 1 (AM) or 12 – 8 (PM) **AND** the servicer calls the night prior with 3-hour arrival window.
  - Conn's Fitness Campaign – 12pm – 4pm; 2pm – 6pm

## How to Schedule:

1. Click the **Book Order** button on the Order Tool Bar.

The screenshot shows the Home Solutions Order Tool Bar. On the left is a vertical menu with options: SCOPE OF WORK, EDIT ORDER, ORDER HISTORY, COMMUNICATION, EQUIPMENT, **BOOK ORDER** (highlighted with a red box), GET DATES, FORM UPLOAD, SHIPPING INFO, JOB RATES, and TRIP CHARGE INFO. Below the menu is a link for 'Client: (click-more info)' and 'Best Buy Login'. The main area displays 'Contact Information' for MARTHA HUG, with fields for Address, Other, Alt. Phone, and Email. At the top right are buttons for 'EDIT CONTACT INFO' and 'PRINT'. Below the contact info is a table with installer information.

| DOLI Job No. | Installer Information ▼ Edit   Login | A 108591 < Serial No. |
|--------------|--------------------------------------|-----------------------|
| 1021-8605    | DC COMPUTERS LLC                     | JOSEPH GARGANO        |
|              | jgargano03@gmail.com                 | 203- 626- 2008        |
|              | Joseph Gargano < Tech                | -- < Alt              |

This displays the available appointment options based on your capacity in the lower portion of the screen.

The screenshot shows a web interface for booking appointments. On the left, under 'Technician', there are radio buttons for 'Mandatory' and 'Exclude', and a 'Choose A Technician' dropdown. Below this is the 'Select Search Parameters' section, which includes 'Time of Day' (set to 'AM - PM'), 'Start Date' (10/23/2010), and 'End Date' (11/22/2010). A 'Days' column shows checkboxes for Mon. through Sun., all of which are checked. On the right, the 'Standard Install Time' is 2.5hrs, 'Time Extension' is +0.5 hrs, 'Booked Count' is 1, and 'Doli Order Id' is 99718389. The 'Available Dates & Times' section shows a table with columns for date, time, and a 'Book/Re-book' link. The table lists dates from 10/30/2010 to 11/06/2010. At the bottom of this section are buttons for 'UPDATE SEARCH CRITERIA NOW' and 'FORCE DATE/TIME'.

2. To choose a specific servicer,
  - a. Choose the **Mandatory** radial button under Technician.
  - b. From the **Choose a Technician** drop-down menu, select the name of the servicer to whom you wish to reassign the job.
  - c. Click the **Update Search Criteria Now** button. This refreshes the list of Available Dates & Times based on the selected servicer.

This screenshot is identical to the previous one, but with two red boxes highlighting specific elements. The first red box is around the 'Mandatory' radio button and the 'Choose A Technician' dropdown in the 'Technician' section. The second red box is around the 'UPDATE SEARCH CRITERIA NOW' button at the bottom of the 'Available Dates & Times' section.

3. Click the **Book/Rebook** link next to the same date and time originally scheduled. This takes you to the appointment Reschedule Reason screen.

The screenshot shows a confirmation screen titled 'Please confirm the following date and installation information.' It contains the following fields: 'Installation Date:' with the value 'November 11, 2010 > 12:00pm - 5:00pm'; 'Type of Installation:' with the value 'hhgregg Troubleshoot'; and 'Job Duration Time(s):' with the value '1 hour'. At the bottom right, there are two buttons: 'ACCEPT BOOKING' and 'CANCEL BOOKING'.

4. Choose **the party that caused the reschedule** from the "Reschedule Caused By" drop down
5. Choose the reason for the reschedule from the "Reschedule Reason" drop down.

Click the **Accept Booking** button on the appointment confirmation screen.

|                                      |                                   |
|--------------------------------------|-----------------------------------|
| Installation Date:                   | Reschedule Caused By:             |
| February 06, 2019 > 07:00am - 1:00pm | Servicer ▼                        |
| Type of Installation:                | Reschedule Reason:                |
| Range Hood                           | Schedule conflict ▼               |
| Job Duration Time(s):                | ACCEPT BOOKING ► CANCEL BOOKING ✕ |
| 2 hours, 30 minutes                  |                                   |

You will be taken to the Order History, which indicates the order has been rebooked.

|                                                                                                                                          |                                              |                      |                                       |
|------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------------|---------------------------------------|
| 02/05/2019 1:27pm                                                                                                                        |                                              | User Type: ADMIN     | Name: Order Admin                     |
| Email to:                                                                                                                                | Subject:                                     |                      |                                       |
| pmofct@gmail.com                                                                                                                         | Scheduled Order for BBUY APPLIANCES-10197025 |                      |                                       |
| Message:                                                                                                                                 |                                              |                      |                                       |
| An order for BBUY APPLIANCES has been scheduled with the customer for 02/06/2019. Please log into your DOLI account to accept this order |                                              |                      |                                       |
| Status:                                                                                                                                  | Scheduled                                    | Comment:             | (scheduled no comment)                |
| 02/05/2019 1:27pm                                                                                                                        |                                              | User Type: INSTALLER | Name: MICHAEL MIELE - P & M OF CT LLC |
| Order Booked                                                                                                                             |                                              |                      |                                       |
| Installer                                                                                                                                | P & M OF CT LLC                              |                      |                                       |
| Install Date                                                                                                                             | 02/06/2019 AM                                |                      |                                       |
| Start Time                                                                                                                               | 7:00 AM                                      |                      |                                       |
| End Time                                                                                                                                 | 12:59 PM                                     |                      |                                       |
| Reschedule Reason                                                                                                                        | SERVICER - SCHEDULE CONFLICT                 |                      |                                       |
| Status:                                                                                                                                  | Scheduled                                    | Comment:             | (scheduled no comment)                |

## Scheduling a Job to a Specific Date and Time

We will “force schedule” an order when the agreed upon date doesn’t populate naturally in DOOLI. There are a few reasons why the date might not populate.

- The job is outside of the servicer’s coverage area
- The servicer does not have the skill set required for the job documented in the system
- The servicer is not available for the scheduled job date/time (e.g., day off)
- The scheduled date or time is within the next 48 hours – DOLI doesn’t naturally populate same or next day appointments.

If no dates populate under Book Order, we can force book the order 3 + days in the future, excluding weekends or holidays.

Troubleshoots/service calls are often force booked because they must be scheduled 48 hours in the future and all leaks/fire troubleshoots are force booked for the same day or the next day, if the call comes in after 6 PM.

**Outside of no dates or service calls, do not force book a job to a servicer unless you have verbal or email confirmation that the servicer can cover the job on that date.**

1. Locate the desired order.
2. Click the **Book order** button on the Order Tool Bar.

- Click the **Force Date/Time** button below the Available Dates & Times list. This will display the “Force Appointments” screen at the bottom on the job.

The screenshot shows a web interface for scheduling appointments. On the left, there are filters for 'Technician' (Mandatory/Exclude), 'Select Search Parameters' (Time of Day: All - PM, Start Date: 10/23/2010, End Date: 11/22/2010), and a list of days (Mon-Sun) with checkboxes. On the right, there's a table of 'Available Dates & Times' showing dates from 10/30/2010 to 11/06/2010 with time slots (08:00am - 12:00pm and 12:00pm - 5:00pm) and 'Book/Re-book' links. Above the table, 'Standard Install Time' is 2.5hrs and 'Time Extension' is +0.0 hrs. A 'Booked Count' of 1 and 'Doli Order Id' are also shown. At the bottom of the table, there's a button labeled 'FORCE DATE/TIME' which is highlighted with a red rectangle.

- From the **Technician** drop-down list, select the servicer to whom you want to force the job. **You will not see this option for Appliance orders.**
- From the **Time of Day** drop-down list, select the appointment time to which you want to force the job.
- From the **Start Date** drop-down menus, select the month, date, and year of the desired appointment.
- If you need to add more time to the job, select the number of additional hours needed from the **Time Extension** drop-down list.
- Click the **Force Appointment Now** button.

The screenshot shows a form titled 'Force Appointment Now'. It has four main sections: 'Technician' with a 'Choose A Technician' dropdown; 'Select Appointment' with 'Time of Day' (AM) and 'Start Date' (02/06/2019) dropdowns; 'Add Duration' with 'Standard Time: 1.5' and 'Time Extension: +0.0 hrs' dropdowns; and a 'FORCE APPOINTMENT NOW' button at the bottom.

- Update the job status to “Scheduled – (scheduled no comment)”. This accepts the job in DOLI, so the servicer doesn’t have to go back and accept the order manually.

|                                                                                                   |                            |
|---------------------------------------------------------------------------------------------------|----------------------------|
| <b>Change Status:</b>                                                                             | Scheduled ▼                |
| The Scheduled status is not available here. In order to schedule this job, please use Book Order. |                            |
| <b>Comment:</b>                                                                                   | - (scheduled no comment) ▼ |
| <b>Add / Edit Notes :</b> (Notes entered here will not appear on the printed workorder.)          |                            |
|                                                                                                   |                            |

## Reschedule Reasons

Customers commonly call to reschedule or change their appointments. The cause of the reschedule can vary, so agents must pay attention to all information provided by the caller. Our business tracks the reasons orders are being reschedule and we use this information to make business decisions

### Rescheduling Guidelines

- If a servicer asks to reschedule the customer, RC agents must call the customer and confirm before rescheduling the order in DOLI.
- **Orders that are rescheduled NOT at the customer's request and NOT at the client's request require an e-mail to field leadership.**
  - o Subject line should include "Rescheduled Customer"
  - o Body of e-mail must include why the customer was rescheduled, customer's original date, customer's new date.

On orders that have been previously scheduled, there will be a drop-down box on the Appointment Confirmation page which requires CRST Home Solutions Agents to correctly select the "Reschedule Reason" as shown below. Agents must choose the most accurate reschedule reason, as this reporting affects business decisions.

Please confirm the following date and installation information.

|                                    |                                   |
|------------------------------------|-----------------------------------|
| Installation Date:                 | Reschedule Caused By:             |
| May 04, 2019 > 08:00am - 12:00pm   | ▼                                 |
| Type of Installation:              | Reschedule Reason:                |
| TV CONNECT & MOUNTING 51" & LARGER | ▼                                 |
| Job Duration Time(s):              | ACCEPT BOOKING > CANCEL BOOKING X |
| 3 hours, 45 minutes                |                                   |

  

|                                    |                                      |
|------------------------------------|--------------------------------------|
| Installation Date:                 | Reschedule Caused By:                |
| May 04, 2019 > 08:00am - 12:00pm   | Customer ▼                           |
| Type of Installation:              | Reschedule Reason:                   |
| TV CONNECT & MOUNTING 51" & LARGER | ▼                                    |
| Job Duration Time(s):              | Site not ready                       |
| 3 hours, 45 minutes                | Customer Requests Reschedule         |
|                                    | Customer not home for original visit |

### Client

- **Unable to complete all services** – Servicer rolls on the job but he is not able to complete all services for the order.
- **Client Request** – The client calls us and asks us to reschedule the order.

- **Equipment Not Available** – The order had to be rescheduled because the product was not available for pick up or is on back order.
- **Failure to follow scheduling process** – Store promised the customer a date that was not scheduled. Rescheduled because of other scheduling issues at the store.
- **Damaged Equipment** – Client provides damaged equipment and installation cannot happen.
- **Defective Equipment** – Client provides defective equipment and the defect was noticed after installation happened.
- **Wrong Equipment** – Client provides wrong equipment. i.e. Wrong product; Wrong Model; Wrong Color.
- **Weather Emergency/ Natural Disaster** – Inclement weather conditions prevent the installation from being fulfilled.

#### **Customer**

- **Site Not Ready** – The customer needs additional labor before the install can be completed or did not provide all equipment (s)he is responsible for.
- **Customer Requests Reschedule** – Customer asks to reschedule the order for any reason other than site not ready or not home for appointment.
- **Customer Not Home for Original Appointment** – Customer is not home when the servicer arrives on site.

#### **Servicer**

- **Vehicle Issue** – The servicer requests the order be rescheduled because he does not have the appropriate vehicle to perform the service. Example: vehicle too small or vehicle is broken down.
- **Schedule Conflict** – The servicer has a scheduling conflict that requires the order be rescheduled. Example: Not working that day; have another job already for that time.
- **Medical Reason** – The servicer cannot perform the job because of a medical issue and the job will need to be rescheduled.
- **Not in the area** – The servicer does not service the customer's area on the scheduled date. The job will need to be rescheduled.
- **Other** – Any reschedule reason that does not match one of the above reasons.

#### **Installs (CRST Home Solutions)**

- **Cannot find a servicer** – CRST Home Solutions was not able to find any service providers to cover the job for any date, causing a reschedule.
- **Cannot find a servicer to meet the date requested** – CRST Home Solutions was not able to find a service provider to cover the scheduled date. The order needs to be rescheduled to a new date.
- **Reassigned service company, kept original date:** When the service company is reassigned but the original date of installation is kept.

#### **Electrolux Specific Options**

- **Client - Concealed Damaged Equipment** – Damage discovered after unboxing at the customer location
- **Client - Shipping Damaged Equipment** – Damage discovered when the product is delivered to the servicer
- **Customer - Customer States Issue Resolved No Need for Unit** – The customer's unit is now working and the customer no longer wants the service
- **Installs inc - Carrier Could Not Contact Installer** – The product could not be delivered to the servicer because the carrier was unable to contact the servicer
- **Installs inc - Changed Servicer After Shipped** – CRST Home Solutions changed the assigned servicer company after Electrolux shipped the product

- **Servicer - Did Not Show** - The servicer did not show up for the appointment, causing a reschedule
- **Servicer - Outside Appointment Window** - The servicer was unable to make the scheduled window, but was able to make a different arrival window the same day