

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

- **Standard 1:** The servicer calls the customer the night before the scheduled appointment to provide a 3-hour arrival window.
 - o DOLI will display as 8am-5pm, but NEVER tell the customer this time
- **Standard 2:** 8am – 12pm (AM); 12pm – 5pm (PM); 5pm – 9pm (PM)
- **Exceptions**
 - o 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.
 - o PC: 2-hour arrival windows; 8am-10am; 10am-12pm; 12pm-2pm; 2pm-4pm; 4pm-6pm

How to Schedule:

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

The screenshot shows a software interface with a sidebar on the left containing various menu items. The 'BOOK ORDER' item is highlighted with a red rectangle. The main content area displays contact information for 'MARTHA HUG' and installer information for 'JOSEPH GARGANO'. The installer information includes a DOLI Job No. of 1021-8605, the company name DC COMPUTERS LLC, and the email address jgargano03@gmail.com. The phone number 203-626-2008 is also listed.

SCOPE OF WORK	Contact Information ▼		EDIT CONTACT INFO	PRINT
EDIT ORDER	MARTHA HUG			
ORDER HISTORY	Address	Other	Alt. Phone	
COMMUNICATION		--	--	
EQUIPMENT	T	Email:		
BOOK ORDER	DOLI Job No.	Installer Information ▼ Edit	A 108591 < Serial No.	
GET DATES	1021-8605	Login		
FORM UPLOAD		DC COMPUTERS LLC	JOSEPH GARGANO	
SHIPPING INFO		jgargano03@gmail.com	203-626-2008	
JOB RATES		Joseph Gargano < Tech	-- < Alt	
TRIP CHARGE INFO	Client: (click-more info)			
	Best Buy Login			

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

The screenshot shows a scheduling interface with the following elements:

- Technician:** Radio buttons for Mandatory and Exclude. A dropdown menu labeled "Choose A Technician".
- Select Search Parameters:**
 - Time of Day:** A dropdown menu showing "AM - PM".
 - Start Date:** A date picker showing "10/23/2010".
 - End Date:** A date picker showing "11/22/2010".
 - Days:** A list of days from Mon. to Sun. with checkboxes. All days are checked.
- Summary:** "Standard Install Time: 2.5hrs", "Time Extension: +0.0 hrs", "Booked Count: 1", and "Doli Order Id: 99193819".
- Available Dates & Times:** A table with columns for date, time, and a "Book/Re-book" link.

Date	Time	Action
Sat 10/30/2010	08:00am - 12:00pm	Book/Re-book
Sat 10/30/2010	12:00pm - 5:00pm	Book/Re-book
Wed 11/03/2010	12:00pm - 5:00pm	Book/Re-book
Fri 11/05/2010	08:00am - 12:00pm	Book/Re-book
Sat 11/06/2010	08:00am - 12:00pm	Book/Re-book
Sat 11/06/2010	12:00pm - 5:00pm	Book/Re-book
- Buttons:** "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:

- A red box around the **Mandatory** radio button in the Technician section.
- A red box around the **UPDATE SEARCH CRITERIA NOW** button in 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 with the following information:

- Header:** "Please confirm the following date and installation information."
- Installation Date:** "November 11, 2010 > 12:00pm - 5:00pm"
- Type of Installation:** "hhgregg Troubleshoot"
- Job Duration Time(s):** "1 hour"
- 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:	February 06, 2019 > 07:00am - 1:00pm	Reschedule Caused By:	Servicer ▼
Type of Installation:	Range Hood	Reschedule Reason:	Schedule conflict ▼
Job Duration Time(s):	2 hours, 30 minutes	ACCEPT BOOKING ► CANCEL BOOKING X	

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	Start Time	02/06/2019 AM
End Time	Reschedule Reason	7:00 AM
		12:59 PM
		SERVICER - SCHEDULE CONFLICT
Status:	Scheduled	Comment: (scheduled no comment)

No Dates Populate

There are situations where dates may not populate under **Book Order**. Most often, this is due to a drive time or skill set issue. If this happens in other departments, the order will be placed into **Needs Installs Inc Action - No Dates** orders. Orders in this status are worked by Market Managers to confirm coverage with a provider in our network and to reach out to the customer for scheduling. The customer will be informed they will be called within 2 days when initially speaking with CRST.

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.

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 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.
3. 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.

Available Dates & Times:		Viewing 1 - 6 of 24	NEXT
Sat	10/30/2010	08:00am - 12:00pm	Book/Re-book
Sat	10/30/2010	12:00pm - 5:00pm	Book/Re-book
Wed	11/03/2010	12:00pm - 5:00pm	Book/Re-book
Fri	11/05/2010	08:00am - 12:00pm	Book/Re-book
Sat	11/06/2010	08:00am - 12:00pm	Book/Re-book
Sat	11/06/2010	12:00pm - 5:00pm	Book/Re-book

4. 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.**
5. From the **Time of Day** drop-down list, select the appointment time to which you want to force the job.
6. From the **Start Date** drop-down menus, select the month, date, and year of the desired appointment.
7. If you need to add more time to the job, select the number of additional hours needed from the **Time Extension** drop-down list.
8. Click the **Force Appointment Now** button.

Technician
Choose A Technician ▼

Select Appointment
Time of Day
AM ▼
Start Date
02 ▼ 06 ▼ 2019 ▼

Add Duration
Standard Time: 1.5
Time Extension: +0.0 ▼ hrs

FORCE APPOINTMENT NOW 🔔

9. 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.

Change Status: Scheduled ▼
The Scheduled status is not available here. In order to schedule this job, please use Book Order.
Comment: - (scheduled no comment) ▼
Add / Edit Notes : (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: May 04, 2019 > 08:00am - 12:00pm	Reschedule Caused By: ▼
Type of Installation: TV CONNECT & MOUNTING 51" & LARGER	Reschedule Reason: ▼
Job Duration Time(s): 3 hours, 45 minutes	ACCEPT BOOKING ► CANCEL BOOKING ✖

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