

Email from Client for Sooner Date

You review the following email in the Request Tracker ticket assigned by the trainer. Work the email in [dolitraining.crst.com](mailto:dolittraining.crst.com) and respond to training@crst.com in Request Tracker.

Hello,

[Customer name] called because they want to have this order moved up to next _____. They were originally scheduled for last week, but the installer never showed up and they had to be rescheduled. We need to get this taken care of right away; this is a really big sale.

Thank you,

Store Manager #1234

Agent:

1. Pull up the order in DOLI and read the Order History
2. Check Book Order to see if the requested date is available.
3. Pretend to CALL the servicer assigned to the order for a sooner date.
4. The servicer will inform that they can work the order on [Requested Date] in the late afternoon.
5. Book the order in DOLI
6. Pretend to call the customer to confirm the new date and time
7. Open **Sooner Date Requested** escalation on the order in DOLI
8. Notate in DOLI
9. Respond to the client in RT.