

## What is Force Scheduling

Force scheduling or Force Booking is used to schedule an order for a date that is not showing in the list of naturally populating dates under Book Order in DOLI.

## Situations that we would Force an Order Included

1. **Service Approval** – CRST Home Solutions speaks with a servicer, who approves a date he can complete an order, either verbally or by email.
2. **Supervisor Approval** – Supervisor or Field Leadership directs or approves [you] to force schedule an order.
3. **Troubleshoots** – Scheduling for troubleshoots will be discussed later in this course.

**\*\*Do not force book outside of the reasons listed above\*\***

## How to Force Schedule

1. Click **Book Order**
2. Scroll to the bottom of Quadrant IV
3. Click on **Force Date/Time**. You will see the form below. We will complete this form.

The screenshot shows a form with the following sections:

- Technician**: A dropdown menu labeled "Choose A Technician".
- Select Appointment**:
  - Time of Day**: A dropdown menu showing "7 AM - 1 PM (6hr)".
  - Start Date**: Three dropdown menus for month ("05"), day ("08"), and year ("2020").
- Add Duration**:
  - Standard Time**: "1.29".
  - Time Extension**: A dropdown menu showing "+0.0" followed by "hrs".
- Force Book Reason**:
  - Please select reason for force booking.**
  - A dropdown menu labeled "Choose A Reason".

At the bottom of the form is a button labeled "FORCE APPOINTMENT NOW" with a yellow lightning bolt icon.

4. **Choose a Technician**: Choose the servicer indicated in the request. If no servicer was given, you may choose the 1<sup>st</sup> one on the list.
5. Choose the **arrival window and date**.
6. Do not make any changes to the "Add Duration" section.
7. Choose a Reason:
  - **Keeping Existing Appointment** – When keeping the current appointment. Often used for moving a job to another service company or resetting an appointment after correcting the order.

- **Supervisor Approval** – A member of management or field leadership gave approval to force schedule.
  - **Servicer Approved Appointment** – The service gave permission to force schedule either by phone, chat, or email.
8. Click **Force Appointment Now**
  9. You will be taken to the Accept Booking/Reschedule Reason page. Complete any drop downs and click **Accept Booking**.

### Assigning Order to a Specific Servicer

There are times when you will need to assign the job to a new Service Company in DOLI. If the Market Manager/Regional Manager makes the request, agents may reassign the order and then schedule/force schedule as requested. If the store or another servicer is making the request, Resolution Care must confirm the change with the NEW service company before assigning the job to them.

To reassign the job in DOLI, use the Edit Order > Change Installer function to look up the new service company by their A#. Please keep in mind that reassigning the order updates the job to “Prescheduled - Assigned” status and the order will need to be scheduled AFTER changing the service company.