

## Rescheduling Guidelines

**CCD Failure:** If an order has previously been CCD failed, the product was not available because the IKEA trailer didn't arrive. We should contact warehouse and/or market manager to ask if the trailer containing that customer's order has arrived. (Email in most cases. Call out for escalated customers.) We cannot schedule the customer until we confirm the product availability.

- The failure reason is on original order in Signature section or in Track/Notes of RST order.

| Order        | Order Items | Service Items   | Notes | Calls | Emails | Survey | Track |
|--------------|-------------|---|-------|-------|--------|--------|-------|
| Type         |             | Value   |       |       |        |        |       |
| Order Edit   |             | UpdateStock TotalPieces: 0 - 2                                |       |       |        |        |       |
| Order Edit   |             | Order cancelled   |       |       |        |        |       |
| Sent Email   |             | AlertFailedOrder en email sent to ikeamemphis@naldelivers.com |       |       |        |        |       |
| Reset Order  |             | Auto Reset triggered by CCD failure                           |       |       |        |        |       |
| Failed Order |             | Failed delivery updated CCD failure                           |       |       |        |        |       |

**If this is an online order (-159) does not have a stock location or delivery date:** The order may have CCD failed. We need to review the order history and reach out the warehouse/market manager to determine the product location prior to scheduling. Do not schedule the order until it is stocked or has a delivery date.

**If an order was failed due to the customer** (1) Not at home; (2) Customer refused delivery; (3) Rescheduled while driver enroute, we cannot reschedule the customer until the customer speaks to IKEA. Refer these customers back to IKEA.

**Missing product:** We cannot reschedule the order until we confirm the products availability. For warehouse orders, you will email the warehouse and market manager to request a warehouse sweep. This will determine if IKEA failed to deliver the item or if we have proof of delivery (POD) on file. This includes any order that CCD fails.

- Check if the order has an assigned carrier or if a time frame has been set
  - If the order has an assigned Time Frames or Carrier, update the order status to "Reset (do not bill original attempt)" before rescheduling.
- Pull up the Days of Service sheet
- Go to the tab for the customer's market
- Search by the customer's zip code
- Offer the customer the next available day of service
- Choose the Requested By
- Click on requested date in LMP
- Advise customer they will receive a call the night before delivery advising of 4-hour arrival window.

9. Recap and close call
10. Enter notes in Notes tab
11. If this is a Store order, email IKEA for a manual event. All other orders, the change in the system should alert IKEA to send a manual event.
  - a. Refer to IKEA Resolutions Contacts sheet
12. Document in **Notes**

## Same Day Reschedule

1. Search in LMP for the order
2. Advise the customer that you will update our driver not to perform the delivery today.
3. Advise the customer that because the items are in transit, the customer will need to speak to IKEA to set a new appointment date.
4. Recap and close the call
5. Call the driver and advise not to roll on the job
6. In **Dispatch**, click on **Edit**
7. Enter a **Failed Note**
8. From Delivery Failed drop down, choose **"Rescheduled while driver enroute"**
9. Click **Save**
10. A new RST order will be created.
11. If this is a Store order, email IKEA for a manual event. All other orders, the change in the system should alert IKEA to send a manual event.
  - a. Refer to IKEA Resolutions Contacts sheet
12. Document in **Notes on the RST order.**

## CUSTOMER WANTS TO PUT ORDER ON HOLD

When the customer would like to place their order on hold, we will reset the order and refer the customer back to IKEA.

1. Ask customer when they would like their service to be performed
2. Contact IKEA
3. Update the job status to "Reset (do no bill original attempt)"
  - a. Scheduling (When ready) will take now take place on the RST order. If the customer does not wish to schedule for a date then document this and leave the RST order unscheduled.
4. Document in notes
5. If this order is scheduled for the same day (today) you will need to fail the order and schedule per the same day reschedule process.

## IKEA REQUESTS DAYS OF SERVICE

There are times when IKEA will call ask which days our drivers are available to schedule the customer.

1. Greet the caller using the client specific greeting.
2. Click on "Search" at the top of the screen in the Navigation Bar and choose "Quick Search"
3. Search by Order Number, Customer Phone Number, or Customer's Last Name.
4. After you find the customer's order in the search results, verify the name on the order and the full service address with zip code.
5. Click the edit symbol to the left of the customer's order information in the first column.
6. Go to Track and review the order history to see if the order was CCD Failed. This means the items weren't available at the warehouse for pickup.
  - a. Yes, CCD Failure
  - b. No Other Fail Reason: Continue to Step 8.
7. Go to the Google Sheets pages and look at the driver's availability information for that order by using the Customer's zip code on the order.

- a. Go to the Google Sheets Page called "IKEA Days of Service"
- b. Look at the Dispatch Box on the order and look at the Account to find the Market Name
- c. In the Google Sheets, find the correct market
- d. Use CTRL + F to find the Customer's zip code to find the available days of service
8. Inform the IKEA rep of the driver's days of service
9. Ask if the IKEA rep knows which date the customer would like to schedule.
  - a. Yes – Continue to Step 10
  - b. No – Skip to Step 14
10. In the "Schedule" box and click "Edit" in the Schedule box. A new screen will appear called "Edit Schedule"
11. Offer the customer one of the driver's available dates that is 48-72 hours out from today. For warehouse orders, also consult the When to Schedule chart
12. Click on the agreed upon date in the calendar.
13. Requested By: Choose from the options based on the call scenario:
  - a. TSP (North American Logistics Group, LLC) - When the date change is driven by NAL
  - b. Client - When IKEA requests a date change
  - c. Customer - When the customer requested a date change
14. Ask the IKEA rep to send a manual event for the customer's new date and time.
15. Advise that the customer will receive a call the night before with a 4 hour delivery window,
16. Recap and close the call.
17. Click "Notes" in the Order Tab.
  - a. Click "Add Notes"
  - b. Choose "UI (Update Info)" from the Note Code drop down options.
  - c. Enter your note in the "Note" field and click "Save" in the bottom right.
18. If this was a store order, send IKEA an e-mail about the change so they can confirm the update.
  - a. If we have verbally requested a manual event, we do not need to email.