

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 Include

1. **Servicer 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. **No Dates Populate** – Dates are not offered within DOLI (**3 business days from today or later**).
4. **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 titled "FORCE APPOINTMENT NOW" with a yellow background. It contains four main 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, day, and year, showing "05", "08", and "2020" respectively.
- 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 1st 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:
 - **No Dates Offered** – No dates populating in DOLI or when force scheduling a troubleshoot/service call order
 - **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**.

No Dates in DOLI

If you are attempting to schedule a customer and no dates appear in DOLI, please follow the steps below:

- Offer the customer a date 3 business days from today.
 - **No Saturdays, No Sundays, no Holidays**. For example: If today is Friday, 10/18, offer the customer the date of Wednesday, 10/23.
 - The customer can accept this date and time **OR** any business day after
- Use the **Force Date/Time** button to schedule the order
- Choose **No Dates Offered** as the Force Book Reason.
- Include the reason you forced the order in your notes

Assigning Order to a Specific Servicer

If you are requested to “reassign” an order to another service company, ask a Pod Lead or Group Lead to reassign the order to the requested servicer. Notate including the Supervisor who you went to for this change.