

Scheduling in DOLI

DOLI schedules orders for arrival windows, meaning the servicer can arrive at the customer's home any time during the given window. The customer must still be available for the length of the service after the servicer arrives.

Standard Arrival Windows

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

How to Schedule in DOLI

- Use Book Order to pull up available dates. Offer the customer the first available date and arrival window.
- Use the Next button to load days further in the future.
- Use the Select Search Parameters options and then press Update Search Criteria Now to search for specific dates.

The screenshot shows the DOLI scheduling interface. Key elements include:

- Navigation Menu:** COMMUNICATION, EQUIPMENT, BOOK ORDER (circled in red), GET DATES, FOLLOW UP, FORM UPLOAD, SHIPPING INFO, JOB RATES, TRIP CHARGE INFO.
- Job Information:** Job Description: 9154 Dishwasher Install, 6499 Haul-Away add-on; Client Order ID: AR#160653; Install Date: 03/24/2020 AM; Comp. Date: n/a; Purchase Date: 03/18/2020.
- Search Parameters (circled in red):** Technician (Mandatory/Exclude), Time of Days (All Day (8-5)), Start Date (03/22/2020), End Date (03/21/2020), Days (Mon-Sun).
- Available Dates & Times:** Table showing dates from Mon 03/23/2020 to Sat 03/28/2020 with time windows (08:00am - 5:00pm) and 'Book/Re-book' links.
- Buttons:** 'UPDATE SEARCH CRITERIA NOW' (circled in red) and 'NEXT' (circled in red).

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 rescheduled 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.**
 - Subject line should include “Rescheduled Customer”
 - 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:	Reschedule Caused By:
Installation Date:	Reschedule Caused By:	May 04, 2019 > 08:00am - 12:00pm	Customer
Type of Installation:	Reschedule Reason:	TV CONNECT & MOUNTING 51" & LARGER	<ul style="list-style-type: none"> Site not ready Customer Requests Reschedule Customer not home for original visit
Job Duration Time(s):	ACCEPT BOOKING > CANCEL BOOKING X	3 hours, 45 minutes	

Remember to always _____ to choose the most accurate reschedule reason.

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