

# Sooner Dates Requests

There are times when a customer will request **a date sooner than is available in DOLI** or the customer will request a **specific date** that is not in DOLI. We will follow the process below. We will also use the “Customer Requests Sooner Date” escalation to track these requests.

## Working Sooner Dates Requests

---

1. Ask the customer which date the customer prefers.
2. Inform the customer that you will contact the servicer to request a sooner date.
3. Ask to place the customer on hold.
4. **Call the assigned servicer/service company**
  - a. **Servicer answers:**
    - i. Introduce yourself and explain you are calling because the customer requests a sooner date
    - ii. Provide the job information, including DOLI Job #, City, Job Description, and requested date.
    - iii. Ask the servicer if he can meet the requested date
      1. Yes, or if the servicer has alternate dates available for a sooner appointment,
        - a. Thank the servicer
        - b. Recap and close
        - c. Return to the customer and thank the customer for holding.
        - d. Inform the customer of the sooner date
        - e. Follow the force book process to book the order to the original servicer for the correct date.
        - f. If necessary, choose the most accurate **Reschedule Caused By** and **Reschedule Reason**
      2. No
        - a. Thank the servicer.
        - b. Recap and close.
        - c. Return to the customer and thank the customer for holding.
        - d. Inform the customer that we unfortunately do not have sooner date available.
        - e. Work with the customer to choose a date the customer will be available and click on **Book/Rebook**
        - f. If necessary, choose the most accurate **Reschedule Caused By** and **Reschedule Reason**
    - iv. Ask the servicer if he can meet the requested date
  - b. **Servicer does not answer:**
    - i. Leave a message for the servicer. Include the **job number** and **requested date.**
    - ii. Return to the customer.
    - iii. Thank the customer for holding.
    - iv. Inform the customer that we unfortunately do not have sooner date available
    - v. Inform the customer that we will call him/her if a sooner date becomes available.
    - vi. Click on **Book Order** and work with the customer to choose a date the customer will be available
    - vii. If necessary, choose the most accurate **Reschedule Caused By** and **Reschedule Reason**

- viii. Recap
- ix. Closing.

5. For all scenarios: Open a “Customer Requests Sooner Date” Escalation in DOLI.

**\*\*This escalation is for tracking purposes only. It will not trigger anyone or anything to find a sooner date for the customer\*\***

- a. **Escalation for: “Installs Inc.”**
- b. **Installer’s A#:** Enter servicer’s A number
- c. **Escalator’s First Name:** “Enter the customer’s name”
- d. **Escalator’s Last Name:** “Enter the customer’s last name”
- e. **Escalator’s Phone Number:** “Enter the customer’s phone number”
- f. **Escalator Title:** “Customer”
- g. **Ownership: “Install Support”**
- h. **Escalation Type:** “Customer Requests Sooner Date”
- i. **Enter notes about customers’ desired date**

DOLI will automatically close the escalation ticket.

6. Notate the order in DOLI.

## Orders Assigned to 9668:

---

9668 is a placeholder company used when an order hasn’t been scheduled before or when DOLI doesn’t have a company available for the job. Jobs scheduled to 9668 are considered scheduled. We do not tell the customer we haven’t confirmed coverage. Instead, our Field Leadership and Phone 2 teams will look for coverage. If they do not find coverage by the day before the scheduled date, the order will need to be rescheduled.

If an order is assigned to 9668 and the customer requests a sooner date,

1. Dummy schedule the order to see if a real service company is assigned to the order.
  - a. If a company is assigned, follow the process described above.
  - b. If no company is assigned, advise the customer that the sooner date is one offered in DOLI.
    - Book the order for a date that works for the customer and confirm the appointment.
    - Advise the customer we will notate their request (in the Additional Instructions) and call if something sooner opens up – but they are currently scheduled for the soonest date.
    - Update any job scheduled to 9668 to “Prescheduled – Rejected” status.
2. Open a “Customer Request Sooner Date” escalation in DOLI.