

# SERVICE CALL PROCESS

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Services completed by CRST Home Solutions servicers warrantied and customers are instructed to call CRST Home Solutions if they experience any issues with their product or service after our servicer leaves the home. Resolution Care agents will create and schedule return visits in DOLI for these customers.

**All installation orders are warrantied for 2 years from the date of installation** – This covers the work the servicer performed. The product itself is not warrantied by CRST Home Solutions.

All repair orders (orders that were originally set up as part of a repair line of business) are warrantied for 90 days from the date of installation.

CRST Home Solutions will create a troubleshoot for:

- The original work was completed but the work was substandard and needs to be fixed.
- The servicer who went out did not complete the entire scope of work, but the original order was put into Completed status.
- Any issue reported by the customer that requires us to return to review the service performed.

## Service Call SKUs

The Troubleshoot SKUs will populate in New Order Entry form to match the client. Choose the available SKU that matches the customer's original order type.

- 5162 – HT/PC Troubleshoot
- 6300 – Appliance Troubleshoot
- 6301 – Gas Appliance Troubleshoot
- 6304 – Plumbing Troubleshoot
- 4500 – Home Services Troubleshoot
- Add SKU 3700 – Damage Claim Tracking SKU whenever the customer states that there are damages from the installation.

**IMPORTANT: DO NOT ADD INSTALLATION SKUS TO SERVICE CALL ORDERS.**

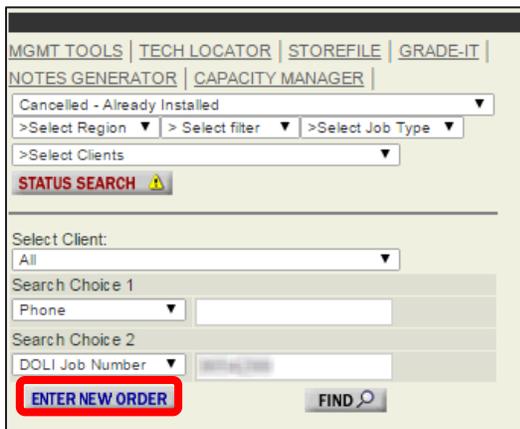
# SERVICE CALL PROCESS

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## Creating a New Troubleshoot Order in DOLI

Use the following steps to create a service call order to perform a return visit to the customer's home.

1. Locate the original service order in DOLI and verify.
2. Ask the caller for a detailed description of the issue
3. Apologize to the caller
4. Check that the original order is in completed status and within warranty period.
5. Confirm that the customer's complaint part of the original SOW
  - a. If the customer is outside of their warranty or if the work is outside of the Scope of Work, the customer should be referred to the client to resolve the issue.
6. Copy paste the original A#, and if available, the original servicer's name to your Notepad
7. Click on **Enter New Order**

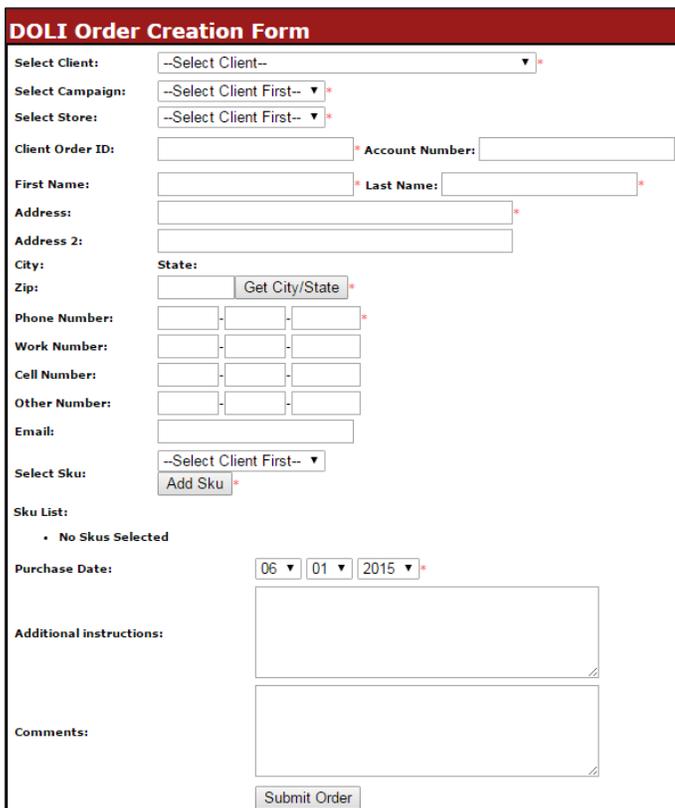


The screenshot shows a web application interface with a navigation bar at the top containing links for MGMT TOOLS, TECH LOCATOR, STOREFILE, GRADE-IT, NOTES GENERATOR, and CAPACITY MANAGER. Below the navigation bar, there are several dropdown menus and search filters. The first dropdown menu is set to 'Cancelled - Already Installed'. Below it are three dropdown menus labeled '>Select Region', '> Select filter', and '>Select Job Type'. Further down is a dropdown menu labeled '>Select Clients'. A red button labeled 'STATUS SEARCH' with a warning icon is positioned below these filters. Below the search filters, there is a 'Select Client:' dropdown menu set to 'All'. Underneath are two search choice sections: 'Search Choice 1' with a 'Phone' dropdown and an input field, and 'Search Choice 2' with a 'DOLI Job Number' dropdown and an input field. At the bottom of the form, there is a red button labeled 'ENTER NEW ORDER' and a grey button labeled 'FIND' with a magnifying glass icon.

8. This opens the *New Order Creation Form*. Complete the following fields:
  - a. Choose the **Client** on the original order
  - b. Choose the **Campaign** from the original order
  - c. For **Store**, choose the Selling Store
  - d. Copy/paste the **Client Order ID** from the original order

# SERVICE CALL PROCESS

- e. Copy the customer Name, Address, Phone Numbers, and E-mail from the original order
- f. Choose the appropriate Troubleshoot SKU from the drop down
- g. Click on **Add SKU**
- h. In the Addition Instructions, enter notes detailing the customer's issue. Ask the following questions:
  - Can you describe the issue in detail?
  - Where is the issue on the unit occurring?
  - When did the issue first happen?
  - How long has the issue been happening?
  - Does the issue occur all of the time or does it only occur when the unit is running?
  - For leaks: How bad is the leak? Or How much water/gas is leaking?
- i. Click on **Submit Order** – The Service Call order has now been created.



**DOLI Order Creation Form**

Select Client: \*

Select Campaign: \*

Select Store: \*

Client Order ID:  Account Number:

First Name: \* Last Name: \*

Address: \*

Address 2:

City:  State:

Zip:  \*

Phone Number: --\*

Work Number: --

Cell Number: --

Other Number: --

Email:

Select Sku: \*

\*

Sku List:  
• No Skus Selected

Purchase Date:   \*

Additional instructions:

Comments:

# SERVICE CALL PROCESS

9. Search by the customer's phone number to locate both orders in DOLI
10. Pull up the new Troubleshoot order
11. Use **Edit Order > Change Installer** to re-assign the Troubleshoot to original service company – this must be done before you schedule the order
12. Click on **Book Order**
  - a. If there was a servicer on the original order, search for dates with that servicer:
    - i. Press the radial button for “Mandatory.”
    - ii. Select the servicer from the drop down.
    - iii. Click on “Update Search Criteria Now.”

<b>Technician</b> <input checked="" type="radio"/> Mandatory <input type="radio"/> Exclude Choose A Technician ▼		Standard Install Time: <b>1.25hrs</b>	Booked Count: 2
		Time Extension: +0.0 ▼ hrs	Doli Order Id: 3654299
<b>Select Search Parameters</b> Time of Days: All Day (8-5) ▼ Start Date: 06 ▼ 03 ▼ 2015 ▼ End Date: 07 ▼ 03 ▼ 2015 ▼		<b>Available Dates &amp; Times:</b> Viewing 1 - 6 of 18 <span style="float: right;">NEXT ↻</span>	
Days: <input checked="" type="checkbox"/> Mon. <input checked="" type="checkbox"/> Tue. <input checked="" type="checkbox"/> Wed. <input checked="" type="checkbox"/> Thu. <input checked="" type="checkbox"/> Fri. <input checked="" type="checkbox"/> Sat. <input checked="" type="checkbox"/> Sun.		Thu 06/04/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a> Fri 06/05/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a> Sat 06/06/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a> Tue 06/09/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a> Thu 06/11/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a> Fri 06/12/2015 08:00am - 5:00pm <a href="#">Book/Re-book</a>	
<b>UPDATE SEARCH CRITERIA NOW</b> ↻		<b>FORCE DATE/TIME</b> 📅	

13. Offer the customer a date that is 2 + days in the future, no Sundays, no holidays.
  - a. If a date 48 hours in the future populates in DOLI, offer that date to the customer.
  - b. If only dates more than 48 hours populate, use **Force Date/Time** for force book the job. – Force Book Reason – No Dates Populating
14. Recap and close the call
15. Notate **BOTH** orders – Include the original DOLI job number and the DOLI job number for the troubleshoot order

## SERVICE CALL PROCESS

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16. If within 2 weeks of the original installation, go to the **original order** and open a **Services not complete or below standard** escalation.

### Customer Requests a Different Service Company

There are times when the customer may request to have a different service company perform their service call. When this happens, we will update the SKU to reflect that we need to pay another service company rather than send the original under warranty. We also need to update the status to alert our field leadership to locate alternate coverage.

1. Click on **Edit Order**
2. Click on **Edit Multiple SKUs**
3. Click on **Add Upsell**
4. Choose **Installs** as **Who Pays**
5. Choose the available **Service Call SKU**
6. Click on **Submit SKU Additions**
7. Update the Troubleshoot SKU to **Cancelled Status**.
8. Schedule the customer for the first available date in DOLI that works for them
9. Update the job status to **Prescheduled - Rejected**
10. Send an e-mail to the field leadership requesting alternative coverage to be found for the order and the reason why the customer doesn't want the original servicer/service company.
11. Recap & close the call