

How to Work DOLI – Technician Training Guide

1■■■ What is DOLI?

DOLI (Digital Online Interface System) is CRST Home Solutions' main web platform for technicians. It's where you receive, manage, and close out installation or service jobs. All communication, job tracking, and payment documentation happens here.

2■■■ Logging In

- Go to <https://doli.installs.com> in a browser (Chrome recommended).
- Enter your assigned technician username and password (case sensitive).
- Click "LOGIN."

If your password does not work, contact your company admin to reset it from "My Tools → Technicians → User Info."

3■■■ Home Page Overview

Section	Purpose
New Orders	Shows new jobs waiting for your acceptance
Scheduled – Dispatched	Jobs assigned but not yet accepted
Scheduled – Accepted	Jobs you have accepted and confirmed
Appointments	Where you log your 3-hour arrival window
Completed	Shows all completed jobs
Escalations	Displays open issues, damage claims, or customer complaints
My Tools	Access personal info, shirt orders, or password settings

4■■■ Accepting Jobs

1. Click "New Orders."
 2. Review details: address, work type, and SOW (Scope of Work).
 3. If you can perform the job, click "Accept All / Print All."
 4. Print or save the work order paperwork.
- If unable to accept, click "Decline" with a note. Call CRST if within 24 hours of appointment.

5■■■ Viewing & Managing Orders

From the DOLI homepage, click "View Orders" or the customer's name. You can see Scope of Work, Equipment details, Appointment Info, History, and use the Order Tool Bar for updates.

6■■■ Setting Arrival Windows

- Call or text the customer before 9 PM the day before.
 - Open the “Appointments” tab in DOLI.
 - Set a 3-hour arrival window (e.g., 10 AM – 1 PM).
 - Save before 8 AM the day of service.
- Failure to log an arrival window may mark you late in DOLI.

7■■■ Updating Job Status

Status	Use When
Scheduled	Job accepted but not yet started
On-Site	You arrive at the customer's home
Waiting Customer Action	Site not ready or product missing
Completed – Complete per SOW	Scope of work finished and customer signed
Need Installs Action	You're declining, missing product, or reporting an issue

8■■■ Uploading Paperwork & Photos

1. Click “Form Upload.”
2. Select the file (installation photos, signed forms, returns).
3. Choose the correct Type (Installation Picture, Accounting Paperwork, etc.).
4. Click “Upload File.”

You must upload paperwork before closing the job to get paid.

9■■■ Closing Out Jobs

1. When the work is done, select “Change Status → Completed.”
2. Choose “Complete per SOW.”
3. Add professional notes and upload paperwork/photos.
4. Submit within 24 hours for payment.

■ Reporting Problems

- Missing or damaged products: Report via IVR or Mobile App → “Product Problem.”
- Customer not home or site not ready: Use “Site Not Ready.”
- Add-on accessory requests (HDMI, sleeves, etc.): Call CRST before performing extra work.
- Damages: Report to Market Manager immediately.

■ Contact Directory

- 1 CRST IVR: 1-888-490-4321 (say 'Update', 'Invoice', or 'Other')
- 2 Field Support Email: fieldhelp@installs.com
- 3 Accounting: accountingbuffalo@crst.com
- 4 Training LMS: Login → top right → LMS link

■ ■ Technician Best Practices

- Mark “On-Site” the moment you arrive.
- Always take before and after photos.
- Keep notes short, clear, and professional.
- Upload everything before end of day.
- Never upsell accessories without CRST approval.
- Follow dress code and safety standards.