

# GARAGE DOOR INQUIRY HANDOFF SAMPLE

ILLUSTRATIVE - NO CUSTOMER DATA

A practical review format for phone, form, voicemail and email handoffs

## FIVE SAMPLE RECORDS - ONE OWNER, ONE STATUS, ONE NEXT ACTION

Fictional intake IDs only. No names, phone numbers, emails or addresses.

| ID    | INTAKE                | AREA          | SIGNAL                                        | CLASSIFICATION  | NEXT ACTION                                                                                  |
|-------|-----------------------|---------------|-----------------------------------------------|-----------------|----------------------------------------------------------------------------------------------|
| GD-01 | Web form<br>7:42 AM   | Las Vegas     | Broken spring; door will not close.           | READY           | Assign a dispatch owner; confirm the door is secure and the location is in the service area. |
| GD-02 | Phone note<br>7:49 AM | Las Vegas     | Same household reports the same spring issue. | DUPLICATE       | Merge with GD-01; keep the latest event and one callback owner.                              |
| GD-03 | Web form<br>8:15 AM   | Henderson     | Opener request; model and symptom missing.    | MISSING CONTEXT | Ask for opener model, symptom, urgency and a safe photo. Do not request access codes.        |
| GD-04 | Voicemail<br>8:41 AM  | Reno / Sparks | Callback number unclear; urgency not stated.  | HOLD            | Verify the callback route and urgency before drafting or scheduling.                         |
| GD-05 | Email<br>9:06 AM      | Henderson     | Message says do not contact again.            | DO NOT CONTACT  | Suppress the record; do not call, text or send a follow-up.                                  |

### SAFE FIRST REPLY EXAMPLE

Hi - thanks for contacting [Company]. I have your request for [service] in [area]. Before we schedule, is the door currently secure, and is anyone blocked in or out? Please do not send access codes, payment details or private documents here.

#### STAFF REVIEWS AND SENDS

This is a draft, not an automated promise or guaranteed response time.

### WHAT THE \$197 REVIEW RETURNS

- Up to 25 redacted inquiries
- One classification per record
- Duplicate, owner and context flags
- A short repair list
- Staff-review reply drafts

NO CRM LOGIN | NO FULL EXPORT

NO OUTCOME PROMISE