**CALL TRANSFER PROCEEDURE**

1. Gather basic info of customer calling
	1. Customer facility address
	2. Customer facility name

**Example:** *Facility Name: Modine*

*Facility Address: 3984 Hwy 51 S., Grenada, MS*

1. Enter customer facility name into CRM search bar like shown & press enter



1. Match the name & address you were given earlier with the name and address shown on the CRM search results page



The highlighted information indicates this is a customer for zone 1C.

For Zone 1A – Transfer to John Cura (primary)/Shane Summerlin or Mike Ursery

For Zone 1B&1C – Transfer to John Harmeier (primary)/Justin Joy (secondary)

For Zone 2A – Transfer to Danielle Jackson/David Williams/Tina Thompson

For other zones – Transfer to Justin Joy or Mike Ursery (unless otherwise noted)