Locking/Unlocking of Welcome Call (Conditional Approvals)

WIKI OVERVIEW

- **Wiki Purpose:** Facilitate the unlocking of Welcome Calls by navigating through the OPS page, identifying and resolving lead-blocking attributes such as prepayment, pending approvals, or documents, and editing the attribute to 'none' only upon verification of resolved issues, while notifying requesting Sales or CE agents if any pending actions persist.
- **Wiki Owner:** Joseph Canaan
- **Validity:** n/a

For unlocking a Welcome Call

When there is a request from CE or Sales to unlock the welcome call, we need to follow this process:

1. Go to the OPS page
2. Go to the Attributes section and look for the "iops/scheduling_block"
3. See what is the reason selected
   - - : means there is no blocking for this lead. No action needed from Approvals.
   - Prepayment: means that the client needs to pay his first scheduled prepayment to automatically unlock. Approvals shouldn't turn this off.
   - pending_cfe_approval: something related to the CFE mgmt is pending. Go to the cfe_mgmt item section and look for the context to see if the IX team has already sign off the item or is still something pending.
   - pending_docs: this one is likely not used anymore, however, if ecountered, go to the property document item section to see the notes of approval and define the document pending. See if they have already submitted the new document.
   - None: there is no blocking for this lead. No action needed from Approvals.
4. Once we verify that there is no pending document or action due to this blocking, we can proceed to edit the attribute and select "none" so the blocking is lifted.
5. If there is still a pending document or action, do not change the attribute and notify the Sales or CE agent that requested the unblocking.

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