

About Dispatch

01/02/2025 10:17 am CST

Overview

Dispatch is our "call center" module, meant for internal call centers. It can be used for globally searching contacts within the brand as well as scheduling appointments and more. There is also a Dispatch Queue for following up on proposals and other tasks. For instance, new leads from your website can be auto-added to the queue for operators to nurture.

Several brands on serviceminder have their own internal call centers, which use Dispatch for booking appointments, creating proposals and more. External/3rd party call centers will most likely use our API to integrate.



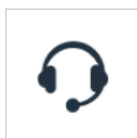
We do not handle the processes or procedures of call centers within serviceminder; it is up to the brand to set up the partnership and work flow based on their requirements.



If the Dispatch icon and grid are not visible to the User, then that User does not have the proper permissions to view/access Dispatch. Consult [User Permissions](#) to troubleshoot.

Settings and Navigation

The first step is to configure the Dispatch Module. Go to **Dashboard>Tools>Dispatch**.



[Dispatch](#)

Dispatch stats and settings.

Click on **Settings** at the top right.

Manage Dispatch | Bob's Handyman Service

Campaigns Settings

Today

CONTACTS	DISPATCH	ORGANIZATION
1	1	0

Here is where the Brand manages the various facets of Dispatch:

- **General Setting** - What is the desired sorting? Warehouse location (of the organizations) or Closest Postal Code?
- **Phone System Integrations**- If your brand wants your phone system to work better with Dispatch (Five9 is for

illustrative purposes only)

- **Dispositions** - Here, a Brand Admin may choose the dispositions for various Dispatch Queue items. Click "Add" to add a new one, "Edit" or "Delete" to edit or delete
- **Statuses** - Again, a Brand may choose different statuses for Dispatch Queue items. This grid works just as the Dispositions grid.
- **SAVE** - Save your settings.

Dispatch Settings | Bob's Handyman Service

General

Organization Sorting:

Callback Queue Page Size:

Five9

Enabled: Enable Five9

Domain:

Username:

Password:

Dispositions

Page 1 of 1 (2 items) ◀ 1 ▶

Add...	Name	Active
Edit Delete	No Answer/Left Voicemail	Yes
Edit Delete	Requested Call Back	Yes

Statuses

Page 1 of 1 (2 items) ◀ 1 ▶

Add...	Name	Active
Edit Delete	Complete	Yes
Edit Delete	Needs Attention!	Yes

Once the dispatch settings are done, Dispatch Users may be created.

Dispatch Users

A Dispatch user has special limited permissions, which means that user may operate **ONLY** in the Dispatch module. Set up Dispatch Users in **Control Panel > Users**. Dispatch users will not be booked for appointments, so no service agent needs to be created for a Dispatch User.

Edit User

Settings
Permissions
Notifications

Name*

Active?

Company

Email*

Mobile Phone

We'll text this number to help you reset your password if you ever forget it.

Role* i

Service Agent

Select a Service Agent to enable scheduling

Navigation App

Send En Route Default On

Owner Distribution Weighting

The weighting for this user to be assigned new contacts.

Commission Rate %

Rate for commission-based compensation

Of course, a Brand Admin may give Dispatch users permission overrides for other parts of the system. It's a best practice to review the standard permissions for this role before launching a Dispatch program.

Dispatch Campaigns

Dispatch Campaigns are built in the "back end" by the ServiceMinder team. Much like Drip campaigns, a Dispatch Campaign can have any number of steps which allows a specified time delay with a corresponding action, to move items in the queue to a higher prominence, or create tasks. With Dispatch Campaigns, the API can be used to add contacts to the callback queue (the most common campaign action)

Dispatch Campaigns | Bob's Handyman Service

New Leads | Contact Added

Step	Delay	Action
1	after 0 minutes	Queue in Dispatch
2	after 1 days	Queue in Dispatch
3	after 1 days	Queue in Dispatch
4	after 1 days	Queue in Dispatch



Callback Campaigns are typically designed for capturing leads brought in via API, but manually entered leads can be added to the campaign using drips.

How to Use Dispatch

Dispatch is located in the left navigation panel (to users with permission). A new Dispatch user, logging in for the first time, will see a Search screen. When a call comes in, the Dispatch user can enter the caller's postal code and/or name to get results, i.e. a list of Organizations (or just one Organization) associated with that contact or postal code.

Dispatch distance is based on how far from the org's warehouse address to the Contact's postal code, OR the closest owned postal code to that Contact. (See settings above)

When a Dispatch user enters a ZIP/Postal Code, the organization(s) that owns the postal code will be displayed. Or, if no one owns that ZIP/postal code, Dispatch displays the closest organization to the entered postal code.

Highlighted Organizations from the postal query (see below) are organizations that OWN that particular postal code. The other results are organizations in the area. The point here is that a Dispatch instance can search multiple brands on serviceminder (brands on which the Dispatch user is a member.)

Search

Postal Code

Enter the postal code to find the organization

Platform Search?

Contact

Enter at least 8 characters to search by name, address, phone or email

Organization

Enter organization public or internal name

Postal Codes

Postal Code	Cities
75093	Plano TX

Organizations

Select	Name	Owner	Email	Phone	Warehouse	Distance	Postal	Tags
<input type="radio"/>	Bob's Handyman - Plano	Assistant Testowner	britey@serviceminder.com	(860) 786-4121	3308 Preston Rd 350 232, Suite 350-232 Plano, TX 75093	3 miles		Handyman,
<input type="radio"/>	Bob's Maids - Plano	Tutorial Account	britey@serviceminder.com	(860) 786-4121	3308 Preston Rd Plano, TX 75093	3 miles		
<input type="radio"/>	Bob's Home Services - Plano		bobs-plano@serviceminder.co	(972) 867-3567	6001 Ohio Dr Plano, TX 75024	3.1 miles		
<input type="radio"/>	Casey's Home Remodeling		crayman@acueresoftware.com	(469) 653-3452	6251 Stephenson Levy Rd Fort Worth, TX 76140	43.3 miles		
<input type="radio"/>	Payment Gateway Tester		support@serviceminder.io	(888) 493-9995	3308 Preston Rd Plano, TX 75093	3 miles		
<input type="radio"/>	Amy's Cakes		astefanos@acueresoftware.com	(817) 808-3436	2600 Ventura Dr, #1626 Plano, TX 75093	3.3 miles		
<input type="radio"/>	Christmas Gamma		cmhallner7@live.com	(469) 263-3436	1525 Telegraph Dr Rockwall, TX	16.7 miles		

As mentioned above, the Dispatch User may search a contact name, or a particular organization name, as well.

Depending on permissions, Dispatch users may be booking appointments, creating proposals, internally accepting proposals and more.

Depending on Brand settings, a Dispatch Queue will be at the top of the Dispatch screen, once campaigns are set up and Leads are coming in via the API and/or from the organizations. The Dispatch Queue may also be used for one Dispatch User to assign a Task to another Dispatch User.

Dispatch Queue								Filter
Action	Due	Local	Status	Priority	Organization	For	Name	Phone
Call Close	Tue, Apr 25, 2023 at 2:26p	5:46p	Working	High	Bob's Pest Control - Houston	Contact	dan@test3.com	
Call Close	Tue, Apr 25, 2023 at 2:26p	5:46p	Working	High	Bob's Pest Control - Houston	Contact	dan@test3.com	
Call Close	Tue, Apr 25, 2023 at 2:26p	5:46p	Working	High	Bob's Pest Control - Houston	Contact	dan@test3.com	
Call Close	Tue, Apr 25, 2023 at 2:27p	5:46p	New	High	Bob's Pest Control - Houston	Contact	dan@test3.com	
Call Close	Tue, Apr 25, 2023 at 2:28p	5:46p	New	High	Bob's Pest Control - Houston	Contact	dan@test3.com	
Call Close	Tue, Apr 25, 2023 at 2:29p	5:46p	New	High	Bob's Pest Control - Houston	Contact	testupdate	
Call Close	Tue, Apr 25, 2023 at 2:30p	5:46p	New	High	Bob's Pest Control - Houston	Contact	testupdate	
Call Close	Tue, Apr 25, 2023 at 2:32p	5:46p	New	High	Bob's Pest Control - Houston	Contact	testupdate	
Call Close	Tue, Apr 25, 2023 at 2:33p	5:46p	New	High	Bob's Pest Control - Houston	Contact	testupdate	
Call Close	Tue, Apr 25, 2023 at 2:33p	5:46p	New	High	Bob's Pest Control - Houston	Contact	testupdate	

Leads that come in via any API integration can also be dropped into the callback queue, tied to a Callback Campaign.

Call vs. Close

Clicking "Call" is just that - the Dispatch agent will place a call to the contact.

"Close" takes the Contact off the Dispatch Queue. The agent may add a note, which will be saved on the contact record.

Close a Callback
Filter

Note*

Save Cancel

Dispatch Queue
Filter

More Dispatch Functions

From the Queue, Click "Call" , then "View Contact"

Callback

Call Regarding

Contact [testUpdated1Q](#)

Call Note*

View Contact Other...

Close

Here, the agent is taken to the additional functionality. They may create a proposal, schedule an appointment, send a message, etc.

The screenshot shows a CRM contact record for 'testupdate'. At the top, there are several action buttons: 'Proposal', 'Schedule an Appointment', 'Message For', 'Edit', and 'Move', which are highlighted with a blue box. Below these are fields for 'Name', 'Unsubscribed?', 'Category', 'Balance Due', 'Communications', 'Lead Source', 'API Key', 'Created', and 'Last Updated'. There are also 'Additional Contacts' and 'Boxes' sections. On the right side, there are sections for 'Notes', 'Tasks', 'Callback Activity', and 'Timeline'. The 'Tasks' section shows a table with one task: 'Follow up on lead'. The 'Timeline' section shows a list of events, including 'Triggered Contact Moved - Task' and 'Triggered Start New Lead Campaign'.

This is also where notes can be entered regarding the call, or where a "result," "disposition" or "status" can be updated.

The screenshot shows the 'Add Callback Activity' form. It includes a text input field for 'Notes*', a dropdown menu for 'Call Result*' with the value '--Select one--', a dropdown menu for 'Disposition' with the value 'None', and a dropdown menu for 'Callback Status*' with the value 'Working'. A 'Save' button is located at the bottom right of the form.

Recap

What Can Dispatch Do?

Search for organizations and contacts by postal code or name.

Dispatch

Search

Postal Code

Enter the postal code to find the organization.

Contact

Enter at least 8 characters to search by name, address, phone or email

Postal Codes ...

Organizations ...

Contacts

Select	Organization	Name	Service Address	Email	Phone
<input type="radio"/>	Bob's Handyman - Plano	Chris Jackson	2612 Deep Valley Trail Plano, TX 75023	Chris.Jackson@keenesoftware.com	(214) 411-878-5661
<input type="radio"/>	Bob's Handyman - Plano	Tom Allen	119 Shadewe Ln. Allen, TX 75013-5406	Tom.Allen@keenesoftware.com	(972) 211-567-8248
<input type="radio"/>	Bob's Handyman - Plano	David Castagna	6633 Mantlewood Dr Plano, TX 75023	David.Castagna@keenesoftware.com	(469) 911-628-8700

Select a contact to view details and scheduling options. Schedule an Appointment. Create a Proposal.

Contact Details

Name: Chris Jackson
 Phone: (214) 878-5661
 Email: Chris.Jackson@keenesoftware.com Send Account Invite
 Service Address: 2612 Deep Valley Trail | Plano, TX 75023
 GeoZones: None
 Drive: Private (3.4 mi)
 Category: Customer
 Lifetime Value: \$128.00
 Balance Due: \$0.00
 Lead Source: Referral - Existing Customer
 Customer Since: 1/4/2010 (Annual Maintenance)
 Last Service: 4/29/2018 8:54 AM
 Next Annual Maintenance: 4/29/2019
 Created: 4/28/2010 7:32:55 PM
 Last Updated: 6/18/2017 7:32:55 PM

Open Appointments

Select	Date	Service	Subtotal
<input type="radio"/>	04/29/2018 10:30 AM	Annual Maintenance	\$99.00

Account Manager: None
 Compressor Model: 4/29/2018 8:10 AM
 Number on Team: Referral Name: Welpel Style: 5/19/2012 paid
 Invoice for Annual Maintenance
 Invoice for Clean & Protect - Residential - Move Lines
 Clean & Protect - Residential - Move Lines
 Annual Maintenance

Notes

When	Title	Note
7/19/2018		Call (uncomplete), Call to offer scheduling an energy audit
7/18/2018 10:30 AM (sched)	Annual Maintenance	battery spent
4/29/2018	Payment for invoice 1228	Check Pref 4/29/2018
4/29/2018	Payment for invoice 1229	Check Pref 4/29/2018
4/29/2018 paid	Invoice for Annual Maintenance	
4/29/2018 8:10 AM	Annual Maintenance	jak.smith
5/19/2012 paid	Invoice for Clean & Protect - Residential - Move Lines	
5/19/2012 12:51 PM	Clean & Protect - Residential - Move Lines	jak.smith
1/4/2010 12:16 PM	Annual Maintenance	jak.smith

History

When	What	Who
4/29/2018	Payment for invoice 1228	
4/29/2018	Payment for invoice 1229	
4/29/2018 paid	Invoice for Annual Maintenance	
4/29/2018 8:10 AM	Annual Maintenance	jak.smith
5/19/2012 paid	Invoice for Clean & Protect - Residential - Move Lines	
5/19/2012 12:51 PM	Clean & Protect - Residential - Move Lines	jak.smith
1/4/2010 12:16 PM	Annual Maintenance	jak.smith

What Can Dispatch Not Do?

While Dispatch is a useful feature in a number of ways, there are certain functionalities not available. Many of these enhancements are on the development roadmap. These include:

- The Dispatch tool doesn't currently support bundling. The **Dispatch Agent** will have to have access within that org and do it within that specific location (rather than using the Dispatch view).
- The Dispatch tool doesn't currently allow for mapping or measuring of an area the way a User can adding or editing a Contact.
- The Dispatch Queue doesn't have the same filter capabilities as the Contacts Grid.
- Dispatch cannot text individual Contacts.
- There are no Dispatch-specific notifications.

Other Dispatch-Related Shortcodes

Other actions include adding to Five9 lists, doing HTTP GET operations and doing HTTP POST operations, both of which support any contact shortcodes in the Url or the Payload (for HTTP POST). A summary of the configuration of campaign callback step settings are shown below:

Ordinal	Action	Settings JSON
0	Queue	
1	Five9	{ ListName: "xxx" }
2	HTTP GET	{ UriTemplate: "xxx" }
3	HTTP POST	{ UriTemplate: "xxx", PayloadTemplate: "" }

FAQs

Is there any way to set a reminder for the call center? So we can have a list of leads we need to follow up on?

Yes, in Dispatch they can create tasks and they can be assigned to a dispatch user (instead of a franchisee location user) that will set reminders for them and those show up in the dispatch queue if date/time is set on them.

[Watch Video Here](#)

Can Dispatch Agents pull reports?

By default, Dispatch does not have access to reporting. To view reports they have to be a **User**, with proper permissions, in the organization.

How do I set up a queue for Dispatch?

This is entirely built by the SM team. You need to tell us:

1. The name of the campaign
2. What you want the status / dispositions to be.
3. What you want the steps to be. For instance, call every 3 days or once a day until the 3rd day then every-other day for 7 days, etc.).

How do I forward my office number to the call center?

We do not handle that part of the process. Depending on which call center you use, you will need to ask them how to set that up. We can set up the API integration and create the Dispatch callback queue for you.

Where does the "send message" in Dispatch go?

If someone in Dispatch sends a message, it goes to the main organization's inbox. This is the email address found in **Control Panel > General** for a location.

Troubleshooting

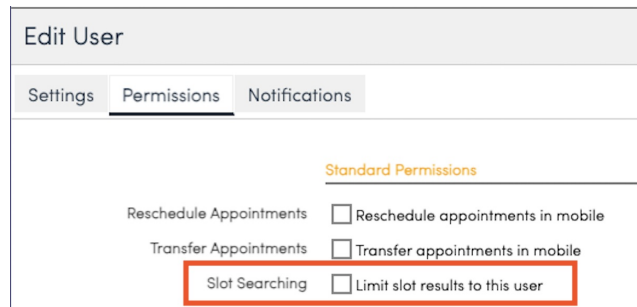
The call center is scheduling for times that no one is available.

There could be a number of issues with the way the schedule is set up. This usually means that you have teams or agents set up showing availability that isn't really there. You may need to edit one or more Service Agents' availability.

If the appointments are in the **Queue** and not on the calendar, then the call center may be told to that by your brand. Being in the queue does not mean a double-booking, it is a process the call center may use to allow you to review, approve, or edit an appointment time before making it official. You may have to call a customer back to reschedule if the promised time is not available.

The call center says that they can't see availability for my Service Agent, but I checked and I have hours set for my availability.

Check your User. You may have the **Slot Searching** turned on. If that box is checked, Dispatch (call center) cannot see you.



The screenshot shows the 'Edit User' interface with the 'Permissions' tab selected. Under the 'Standard Permissions' section, there are three items: 'Reschedule Appointments' with a checkbox for 'Reschedule appointments in mobile', 'Transfer Appointments' with a checkbox for 'Transfer appointments in mobile', and 'Slot Searching' with a checkbox for 'Limit slot results to this user'. The 'Slot Searching' checkbox is checked and highlighted with a red box.

I want the call center to schedule in **Team mode** but they keep scheduling in **Agent mode** instead.

Through Dispatch, the Dispatch Agent only sees the parts, services, schedule, or calendar view of the owner that they are scheduling on behalf of. If you have your calendar set on Agent mode, they see it in Agent mode. If you switch back and forth between Agent Mode and Team Mode (we do NOT recommend this), they will see whatever you happen to have it as in that moment.



Switching from **Agent Mode** to **Teams Mode** causes all kinds of scheduling issues. We recommend finding what will works best and sticking to it.