

Dispatcher *Day.*

The actions a dispatcher takes most days, in order. Each one names the Action Filter or control, the click, and the data point that proves it happened. Work by exception: the Action Filters are your inbox, and an empty Action Filter is the goal.

Morning, in this order.

#	DO THIS	WHERE	THE CLICK	PROOF IT HAPPENED
1	Open your view	Work Orders page › filter funnel	Load your My Work template, with Region, Client, or Work Order Manager pinned.	The Schedule, Operations Failure, and Verify Trips counts are your territory's, not the company's.
2	Clear Operations Failure	Operations Failure Action Filter	For each row: call the Vendor, then from the Trip menu Edit Visit, Edit Trip (new ETA or dates), + TRIP, or Cancel.	Action Filter at zero, or every row left has a note and a Follow Up Date on its Work Order.
3	Dispatch Schedule	Schedule Action Filter	Not Dispatched, Urgent, Rejected: assign and Save & Dispatch. Work Orders with no Trip: + TRIP. Urgent first.	A blue pin on every row you touched; the Action Filter count down by that number.
4	Verify	Verify Trips Action Filter (the Trips page for bulk)	Times, origin icon, photos, Tasks, notes. Verify, or leave it and send the Vendor a note naming what is missing.	Trip Verified with no pin; Generate Invoices, Receivable, Payable appear in the header.
5	Date the rest	Follow Up Date column, sorted	Anything waiting on someone else gets a date. Waiting For Approval Trips get a call.	No open Trip in your territory without a Follow Up Date.

When a pin is not blue.

PIN	WHAT YOU SEE	WHAT HAPPENED	CLICK PATH
	Is Late, then Never Arrived	ETA passed with no check-in. Still on the phone.	Call. On site: they check in from the app. Coming later: Trip menu › Edit Trip, new ETA. Were there: Edit Visit with the confirmed times.
	Never Arrived Expired	The Trip Expiration passed. It is off the phone.	Trip menu › Edit Trip: Work Order Close first, then Trip Expiration, then ETC, then ETA. Reassign. Save & Dispatch.
	Didn't Check Out	ETC passed with no check-out.	Call for the time they left. Trip menu › Edit Visit › Check Out. Status moves to Verification Required.
	Must Return	The technician left with work remaining. The platform made the return Trip.	Schedule Action Filter: the new Trip is there as Not Dispatched. Assign, Save & Dispatch.
	Unable to Service	On site, could not do the work.	Read the technician's note. + TRIP if the Service is still needed.
	Waiting For Approval	Dispatched; the Vendor has not accepted. In no Action Filter.	Call the Vendor. If the ETA is close, reassign. Put a Follow Up Date on it.
	Not Dispatched after you saved	Save, not Save & Dispatch. Nobody was notified.	Trip row › Re-send Dispatch Email. Do not create a second Trip.
	Verification Required, no photos	Photos went to Attachments, or no Asset on the Work Order.	Leave it unverified. Note to the Vendor: upload on the Visit. Associate the Asset for next time.

End of day.

CHECK	PASS WHEN
Verify Trips	Zero for your territory, or every row left has a Vendor note saying what is missing.
Operations Failure	Count recorded. Every row in it has a Follow Up Date and a note.
Schedule	Nothing at Urgent Not Dispatched. Every Work Order with no Trip has an owner.
Notes	Every note that needed a reply went out with the right To chip and the email icon.