NOMAD SMALL BUSINESS SUITE

# Service Desk Pro - Dispatcher Role Guide

A coordination guide for creating, prioritising, assigning and scheduling all operational tickets without financial, configuration, file-upload, time, sign-off or AI permissions.

**Edition: 1.1.3**
**Audience: Dispatchers and Service Coordinators**

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This guide is based on the verified product package and is written as an operational reference. Use the online version for navigation and this PDF for offline access.

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# 1. Role purpose and access boundary

The Dispatcher / Service Coordinator allocates and schedules work across the desk. The role sees the operational queue, customers and resource availability but does not perform technician, financial or platform-administration actions.

## Who should receive this access

Assign this role to a coordinator responsible for intake, assignment, scheduling and customer logistics. It is not a technician substitute and does not include time, sign-off, file upload or Ticket AI.

## What this role can see

- All operational tickets and basic histories
- Unassigned and assigned work
- Customers and contact/site information needed for coordination
- Resources, availability and capacity
- Internal coordination/technical notes
- Existing ticket files required to understand or coordinate work
- Priority, status, product, quote-required and onsite indicators

## What this role can do

- Create tickets
- Assign and reassign resources
- Change operational ticket details, priority and status
- Schedule and reschedule through available ticket/site fields
- Reply to customers
- Add coordination and internal notes
- Escalate work to a Manager

## What this role cannot do

- Upload ticket files
- Log time or capture sign-off
- Use Ticket AI
- Manage customer or resource records
- Open operational analytics or exports
- See billing, rates or financial quote controls
- Manage settings, users, roles, licensing or deletion

# 2. Sign-in, navigation and account setup

Start with the correct named account and confirm that the visible workspace matches the assigned access.

## First sign-in

1. Sign in with the named Dispatcher account.
2. Confirm landing on Support Desk > Dashboard.
3. Confirm Tickets, Add Ticket, Customers and Resources are available.
4. Confirm Analytics, Billing, Users & Roles, Settings, AI and Licence are absent.
5. Open a controlled ticket and test assignment, status and coordination note.
6. Confirm file upload, time, sign-off and Ticket AI are unavailable.

## Navigation

| Area | Availability or purpose |
|---|---|
| Dashboard | Operational queue overview |
| Tickets / Add Ticket | Create and coordinate all tickets |
| Customers | Read-only coordination details |
| Resources | Read-only availability/capacity |
| Analytics / Billing | Not available |
| Users / Settings / AI / Licence | Not available |

## Account and resource relationship

A Dispatcher receives an active staff resource profile and can be assigned to a ticket, but the role is designed to coordinate rather than perform technician work. Resource/user links and operational resource records are managed by Administrator or Manager as permitted.

# 3. Daily operating routine

Use a consistent routine so ownership, communication and audit records remain current.

## Start of day or session

- Review new and unassigned tickets
- Validate urgent/high impact
- Check today's scheduled/onsite work
- Review resource availability and customer responses
- Identify tickets requiring Manager escalation

## During the day

- Assign the correct resource
- Update schedule/site/contact details
- Keep customers informed of coordination changes
- Record coordination notes
- Monitor waiting, delayed and reassigned work

## End of day or session

- Ensure every active ticket has an owner
- Confirm next-day schedule and site information
- Hand over unresolved priority conflicts
- Review tickets left on hold/Pending
- Record missed customer contacts

# 4. Primary workflow

Move each request from intake to a clear owner, schedule and next action.

## Dispatch procedure

1. Confirm customer, site and contact information.
2. Validate priority and required service context.
3. Check resource availability and current workload.
4. Assign the primary and additional resources.
5. Record scheduling or coordination information.
6. Send a customer-visible confirmation when required.
7. Set the status that reflects the next action.
8. Escalate capacity, scope, financial or service-risk decisions to the Manager.

## Decision and quality rules

- Assign only active resources
- Do not use Urgent merely to move a ticket ahead
- A Dispatcher can view existing evidence but cannot upload new files
- Do not perform time, sign-off or AI actions using another role's account
- Escalate financial scope and deletion rather than attempting a workaround

# 5. Communication, notes and records

Create records that another authorised person can understand without relying on memory or a separate email.

## Record standards

| Record | Required content |
| --- | --- |
| Coordination note | Contact attempt, schedule, resource decision and next action |
| Customer reply | Visit/assignment information and customer requirement |
| Assignment change | Old/new owner, reason and timing |
| Hold/escalation | Blocker, impact, requested Manager decision |
| Site details | Current location/contact information necessary for the job |

## Visibility rules

| Content | This role's access or responsibility |
| --- | --- |
| All operational tickets | Visible |
| Customer/resource coordination data | Visible; not manageable as master records |
| Internal notes/existing ticket files | Visible for coordination |
| Upload/time/sign-off/AI | Unavailable |
| Analytics/financial/settings/users | Unavailable |

## Information protection

- Use customer contact details only for coordination
- Do not copy internal technical notes to the customer without review
- Do not download or forward files unnecessarily
- Never store access credentials
- Keep schedule and contact information current

# 6. Handover and escalation

Escalate work with enough verified context for the next authorised role to act safely.

## Escalate when

- No suitable resource or capacity is available
- Priority or scope is disputed
- A quote, billing or financial decision is required
- Technician work, file upload, time or sign-off must be completed
- A customer/privacy/access problem is suspected

## Handover procedure

1. Record current assignment and schedule.
2. State the coordination already completed.
3. Identify the blocker and operational impact.
4. Name the Manager or technician action required.
5. Record the customer's latest expectation.
6. Confirm acceptance by the new owner.

## Escalation evidence

- Ticket number
- Customer/site/contact
- Resource availability considered
- Contact attempts and times
- Current priority/status
- Requested decision

# 7. Access problems and recovery

Identify expected restrictions before treating them as faults.

## Access troubleshooting

| Problem | Check or action |
| --- | --- |
| Cannot upload a file | Expected Dispatcher restriction; assign/hand to Manager or Technician |
| Analytics menu missing | Expected role boundary |
| Cannot edit customer/resource record | Dispatcher has view access only |
| Ticket action denied | Confirm it is a coordination action covered by the role |
| Direct wp-admin URL redirects | Expected Support Desk-only restriction |

## Do not bypass the role model

- Do not share Manager or Technician accounts
- Do not add direct capabilities
- Do not record fake time or sign-off
- Do not use public replies for private coordination details
- Do not store financial amounts to work around restricted fields

# 8. Quick reference and review

Use this checklist during onboarding, supervision and periodic access review.

## Role checklist

- Dispatcher role
- Active staff resource
- All operational tickets
- Coordination menus only
- Assignment/status/reply tests passed
- Upload/time/AI/financial restrictions confirmed
- Manager escalation route known

## Periodic review

1. Review Dispatcher accounts and duties.
2. Sample assignment and schedule changes.
3. Confirm no extra capabilities or WordPress roles.
4. Check coordination notes and customer messages.
5. Retest restricted actions after updates.

## Related master documentation

- Service Desk Pro Detailed User Guide
- Service Desk Manager Role Guide
- Technician / Resource Role Guide
- Customer / Requester Portal Guide