



CHECKLIST · FIELD SERVICE

Dispatch Readiness Checklist

A checklist for running a dispatch operation that sends the right tech, with the right parts, to the right site, and captures everything billable along the way.

FIELD SERVICE · CHECKLIST

A single service call has five chances to lose money: dispatch, travel, parts, labour, and invoicing. Dispatch is first, and it sets up the other four.

This checklist covers what a dispatch operation should know before a truck moves, and what the system should capture without anyone remembering to do it.

Before assignment

- ☐ Customer record current: site address, contact, access notes
- ☐ Equipment history at the site visible to the dispatcher
- ☐ Contract status checked: warranty, service agreement, or billable
- ☐ Skills required matched to tech certifications
- ☐ Estimated duration set from job type, not habit

At assignment

- ☐ Parts likely needed identified from equipment history
- ☐ Truck stock checked against those parts before roll
- ☐ Route considered: nearest qualified tech, not next name on the list
- ☐ Job priority set against contract response times
- ☐ Customer notified with a real arrival window

What the tech sees on arrival

- ☐ Full work order on the phone: issue, history, site notes
- ☐ Prior visits to this equipment, with what was done and by whom
- ☐ Safety and access requirements for the site
- ☐ A way to add parts and time as they happen, not from memory at day end

Closing the call

- ☐ Labour recorded at the site, at completion
- ☐ Parts used recorded against the work order before leaving
- ☐ Photos and customer signature captured on the phone
- ☐ Follow-up work flagged as a quote opportunity, not a mental note
- ☐ Work order status set so billing can invoice same day



Questions about any of this?

Summit Business Systems has been implementing ERP for Ontario businesses since 1991. We are an Acumatica Gold-Certified Partner based in Barrie, working with construction, field service, distribution, and professional services companies across the province. If you want a second opinion on anything in this checklist, we give straight answers.

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