

## Automation Features for Dispatchers/on Dispatcher's portal

### Set Automation on Daily tasks and Report for Dispatchers

#### Automation for Daily tasks

- Send a Notification or a text to the Dispatcher/ user portal to share the Daily tasks for today ( **send at the start of the shift or day** )
  - Ask to update for today status in the dispatcher's portal about all active carriers and other tasks ( new leads)

Daily tasks for all dispatchers should redirect to Admin user and Team Lead ( So they will monitor, guide and lead the team. Can check and Balance for other tasks )

#### Automation for Daily Report

- Send a Notification or a text to the Dispatcher/ user portal to share the Daily report for today **before the end of shift or day** ( etc 15 minutes ago)
  - Ask to update for today report about all booked loads and invoice generated by dispatcher and other tasks ( Active leads)

Daily report for all dispatchers should redirect to Admin user and All the dispatcher

Add points

Total Invoice for today

Totals loads

Highest invoice by Dispatcher's Name

Active leads

Total Pending Invoice for all carriers

Today Performance graph

etc

### Set Automation for Alert Notifications on daily/weekly target/ achieved invoice Performance

- Send **Alert notification** on Dispatcher portal when dispatcher's daily invoice less than
- **40%** or **0%**
- Send **Alert notification** on Dispatcher portal when dispatcher's weekly invoice less than **40%**
- Send **Appreciating** Notification on Dispatcher portal when dispatcher's daily invoice more than **100 %**
- Send **Appreciating** on Dispatcher portal Notification when dispatcher's weekly invoice more than **100 %**

## Set Automation for New leads / Leads

- Send notification on Dispatcher portal when the TL assigned a lead to the xyz dispatcher
- Set automation notification about the new leads on the next day ( when a lead come from sales and xyz dispatcher took up this lead, a automated notification on dispatcher port should be send on second day about the latest status of this lead, dispatcher has to update the status in CRM portal) and this updated status of the new leads should resend to Sales team and dispatcher TL portal so both will be updated about this new lead and will guide more better )
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- Set Automated notification or text after 7 days after every week about all new leads or inactive leads that are in the dispatcher portal to update the current status of the lead
- ( this automated notification keeps sending until or unless the dispatcher unqualified this lead on the basis of solid / qualified reason.
- This weekly updated status should redirect to the Sales team and Dispatcher's TL. So they will keep updated
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- Send automated notification or text to Sales team when a dispatcher active a lead
- Send automated notification or text to Sales team when a dispatcher unqualified a lead
- Updated status active/ unqualified should redirect to admin user, sales team TL, dispatcher TL