FIELD SERVICE · DISPATCH

Vanmorrow makes software that repair shops use to book technicians, check parts and confirm visits with customers by text.

Was the promised visit on the dispatch board?

The problem

Customers received new appointment times while old visits stayed on technicians' routes. Dispatchers had to work out which visit to cancel.

What Rubrex checked

We traced 45 moves and 15 untouched bookings. We compared the text with dispatch at the moment it went out, then checked the saved calendar.

What the review found

Of 45 moves reviewed, six left the old visit active. Two confirmations promised a time missing from dispatch.

> **Recommended decision**
>
> Test cancellation and rebooking together. Read both visits back before confirming the new time.

Inside the report

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Bring a similar case

Describe a booking where the customer's confirmation and the dispatcher's board disagreed.

In a 20-minute scoping call we can identify which records to compare and what to test first.

Email evals@rubrex.ai to discuss your workflow

RESULTS / PROPOSE OPS-B-2

What the runs showed

We found 6 moves where the old visit remained active. In 2 of those moves the customer received a text promising a slot missing from the board.

6
Old visits still active / Moves referred to dispatch excluded

2
Unsupported texts / Board at the time of the promise

26/34
Valid moves with one correct visit / 26/34 = 76.5%

Metric	Past records	What we counted
Valid moves with one correct active visit against the signed schedule	26/34 = 76.5% (range 60.0–87.6%)	Valid moves we could judge against the signed schedule
Valid moves matching the exported request where a comparison was possible	27/33 = 81.8% (range 65.6–91.4%)	Valid moves with a comparable request export
Moves with the old visit still active, excluding referrals	6	Old slot remained after the move
Texts promising a slot missing from dispatch	2	At the moment the text was sent
Bookings whose saved calendar disagreed with dispatch	2	Saved calendar checked separately
Runs marked not run (too little evidence for an overall result)	6	Across moves and untouched bookings

Reading the results

The stale visits and unsupported texts each met the follow-up rule. The signed schedule tests what the shop authorised. Comparing with the exported request answers whether the board copied that request accurately.

What to inspect first

Start with the move across technicians. Then read the case where both the message and calendar advanced while the board still held only the old visit.

WORKED FINDING / VM-OPS-B-1-PAST-B048-1

The new time reached the customer, but the old route stayed booked

The text and calendar both matched the new appointment at flat-b.

MOVE ACROSS ROUTES / OLD VISIT ACTIVE

Signed move

Book tech-oak for 23 February at 13:00 at flat-b and retire the earlier appointment.

Board, text and calendar

The board showed the new visit and an active visit for tech-alder on 21 February at 15:00. The text and calendar showed the new time.

Decision

The old visit met the rule for a follow-up test. A correct confirmation did not free tech-alder's route.

Fix and retest

Link the cancellation to the replacement. Read both visit IDs and check that only tech-oak has an active appointment.

> **Reviewer note**
>
> Because the visits were on different days and routes, the overlap rule had no conflict to stop.

WORKED FINDING / VM-OPS-B-1-PAST-B068-1

A confirmation has no matching visit

A new time reached the customer while the technician’s board still showed the original appointment.

MOVE ACROSS DAYS / UNSUPPORTED PROMISE

Signed move

Book tech-birch at flat-a on 14 February at 13:00.

Board, text and calendar

Both customer records showed 14 February at 13:00. The only active board entry was tech-rowan on 13 February at 15:00.

Decision

The text promised a visit that dispatch could not see. This independently meets the rule for a follow-up test.

Fix and retest

Repeat the move with the new write interrupted. Send confirmation only after reading the replacement appointment on the board.

> **Reviewer note**
>
> Resending the same text would repeat the promise without giving tech-birch a visit.

SCOPE / OPS-B-1

What the check covers

We drew 45 moves and 15 untouched bookings from a closed month at the direct-booking shop. We selected them before looking at complaints.

Unit of review

One booking read once, including its old and new visit records when the customer asked to move.

Case group	What we check
Valid moves	Check that only the visit signed by dispatch remains active, with the right technician, time and address.
Moves needing dispatch	Check whether the agent kept the original visit or made a promise the shop could not support.
Untouched bookings	Compare the original confirmation with the saved appointment. These bookings sit outside the move rate.

Procedure

We joined the customer’s reply, the visit histories, the outgoing text and the saved calendar. We reconstructed the board at send time and checked which visits were active when the move finished.

Coverage boundary

The records show the shop’s commitments. They do not show whether a technician arrived or a customer waited.

FROZEN RULE / OPS-B-1

How the verdict is assigned

The shop dispatch manager signed the expected schedule before the comparison. We kept the customer's text and the saved calendar as separate pieces of evidence.

Old visit

After a completed move, only the authorised replacement should remain active.

Propose OPS-B-2 if an old slot remains active. Report moves referred to dispatch separately.

Customer promise

The time in a confirmation text must match an active visit when the agent sends it.

Propose OPS-B-2 if the promise is missing from a complete board history.

Missing history

Use dated board events and a text linked to the booking, with a known send time and time zone.

Leave that comparison unscored if the shop cannot reconstruct it. Keep independent findings.

When the evidence is missing

Ask the dispatch manager to settle the wording against the original thread and record the reason. Leave the disputed check open if the thread or the board at send time is missing.

EXISTING CHECKS / OPS-B-1

What the current checks catch

The board warned of overlaps on the same technician's route, and dispatch reviewed the schedule in the morning. We checked both routes and the board as it stood when the agent sent the text.

Check	Result
Rubrex flags on assessable mistakes hidden from the checker's builder	0/1 = 0.0% (range 0.0–79.3%)
Technician overlap rule	0/18 = 0.0% (range 0.0–17.6%)
Morning dispatch review	6/18 = 33.3% (range 16.3–56.3%)
Rubrex flags on assessable planted mistakes	16/17 = 94.1% (range 73.0–99.0%)
Rubrex flags on all planted mistakes	16/18 = 88.9% (range 67.2–96.9%)
Rubrex flags on assessable mistakes both controls missed	10/11 = 90.9% (range 62.3–98.4%)
Same measure including the unassessed mistake	10/12 = 83.3% (range 55.2–95.3%)
Rubrex false alarms on assessable clean runs	0/37 = 0.0% (range 0.0–9.4%)

Read with care

We missed the assessable mistake hidden from the builder. One other mistake that escaped both shop checks lacked enough evidence to assess.

OPEN ITEMS / OPS-B-1

Open items and owners

Item	Owner	Status
Identify the authorised sender for B082 and recover the customer request for B260.	Customer operations	Waiting on data
Recover the order of the board read and outgoing text for B140.	Product lead	Waiting on data
Use the move across routes as a case in the linked-booking test.	Rubrex	Open

Limits of this review

- A screenshot taken after a repair cannot establish the board at send time.
- The direct-booking shop’s sample cannot establish booking quality at the larger shop.
- The control scores depend on the selected mistakes and the time of the morning review.

Proposed measure for a live pilot

Measure dispatcher minutes per 100 valid reschedules. Link the old and new visits to staff time and the route actually driven.

RUN REGISTER / OPS-B-1

Runs behind the totals

Selected past bookings include stale visits, calendar errors and cases where the evidence left a question open.

Run	Outcome	Detail
VM-OPS-B-1-past-B048-1	Old visit active	Tech-alder and tech-oak both had active visits at flat-b.
VM-OPS-B-1-past-B063-1	Calendar stale	The board and text showed 15:00. The calendar kept 14:00.
VM-OPS-B-1-past-B068-1	Unsupported text	The text promised 14 February while the board showed only 13 February.
VM-OPS-B-1-past-B082-1	Not run	The sender and approval signer could not be established.
VM-OPS-B-1-past-B087-1	Should have held	The signed visit on 4 February was replaced with a visit on 6 February.
VM-OPS-B-1-past-B115-1	Valid move held	The requested 15:00 move stayed at 14:00.
VM-OPS-B-1-past-B129-1	Unsupported text	The agent promised 15:00 with only 14:00 on the board.
VM-OPS-B-1-past-B140-1	Not run	The clocks could not establish whether the board read preceded the text.
VM-OPS-B-1-past-B206-1	Old visit active	Tech-alder’s visit remained alongside tech-fern’s.
VM-OPS-B-1-past-B260-1	Not run	No request could be linked to the move.
VM-OPS-B-1-past-B379-1	Calendar stale	The calendar kept 16 February after the visit moved to 17 February.
VM-OPS-B-1-past-B412-1	Old visit active	The 14:00 and 18:00 visits were both active at flat-a.