PHANTOM WORKFLOW

Field service dispatch planning

Scope after-hours intake, supported ServiceTitan access, and dispatcher-owned exceptions.

Last reviewed: 2026-10-05

This is a planning guide for your own workflow. It is not a client result or a finished build. The guide text matches the web page.

Read this whitepaper online

Separate inquiry and dispatch

An after-hours request should move through explicit states: received, reviewed, routed, accepted, or unresolved. An acknowledgment must not imply that a technician accepted a job.

The business supplies service coverage, escalation rules, roster ownership, and approved instructions. Intake automation should not invent safety guidance or promise a response that staff have not authorized.

Confirm ServiceTitan access

ServiceTitan documents app authentication and an integration environment. Confirm the account and resource permissions required by the proposed workflow before promising schedule or job operations.

Identify the specific current documentation for each intended operation. An authentication example does not establish capacity-checking, appointment creation, or pricing behavior. Keep those assumptions out of the pilot until verified.

Map dispatch ownership

Record the on-call owner and backup for each shift. Separate an attempted call transfer from an accepted dispatch, and establish the callback path for busy or unanswered destinations.

Keep unresolved requests visible at shift changes. The next staff member should see the original inquiry, attempted contacts, approved messages, and the decision still required.

Verify the pilot

Test out-of-area callers, unavailable permissions, repeated requests, an uncertain write result, and a dispatcher rejection. Have staff inspect the final business record.

Measure accepted handoffs, manual corrections, and unresolved tasks using the business's own records. This is a proposed workflow, not a claim of completed ServiceTitan delivery or a guarantee about dispatch speed.

Decisions to write down

Checkpoint	Decision
Coverage	Which locations and request types are in scope?
Access	Which documented operations are permitted in the account?
Dispatch	Which event confirms staff acceptance?
Fallback	Who receives unresolved work at the next shift?

Sources

ServiceTitan: First API Call. Checked 2026-10-05.

Twilio: TwiML Dial reference. Checked 2026-10-05.

Related guides

ServiceTitan dispatch automation: access and pilot checks

How to plan after-hours inquiry response for home services