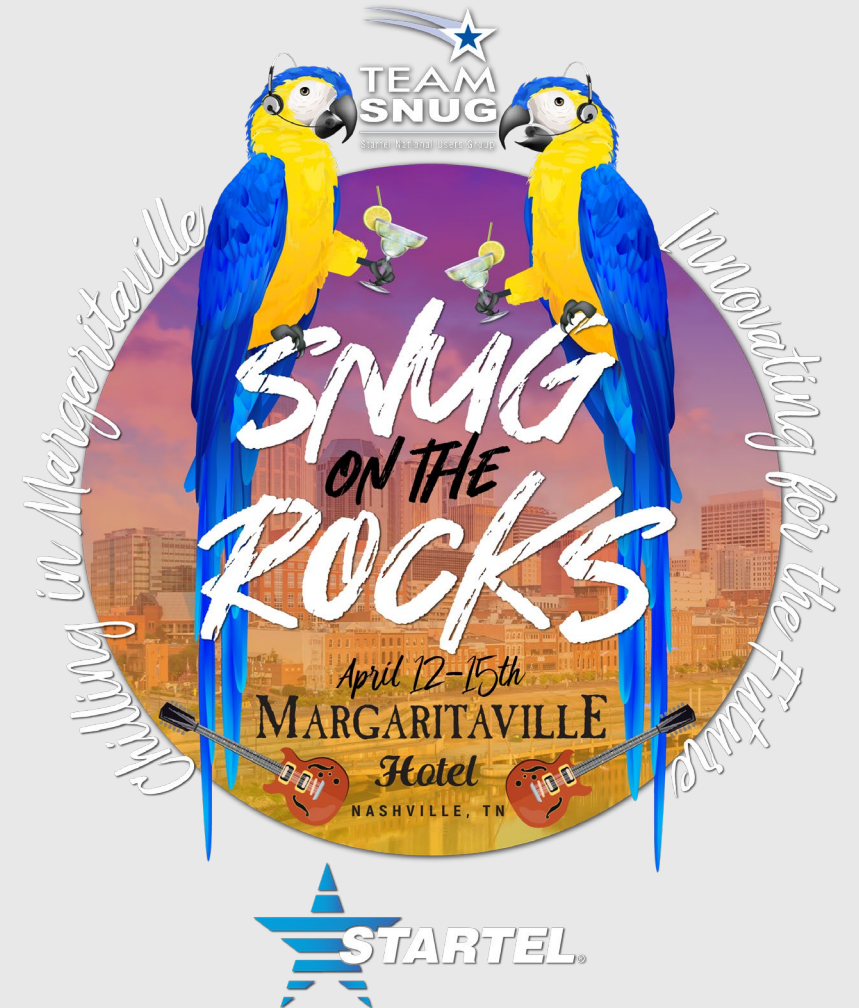


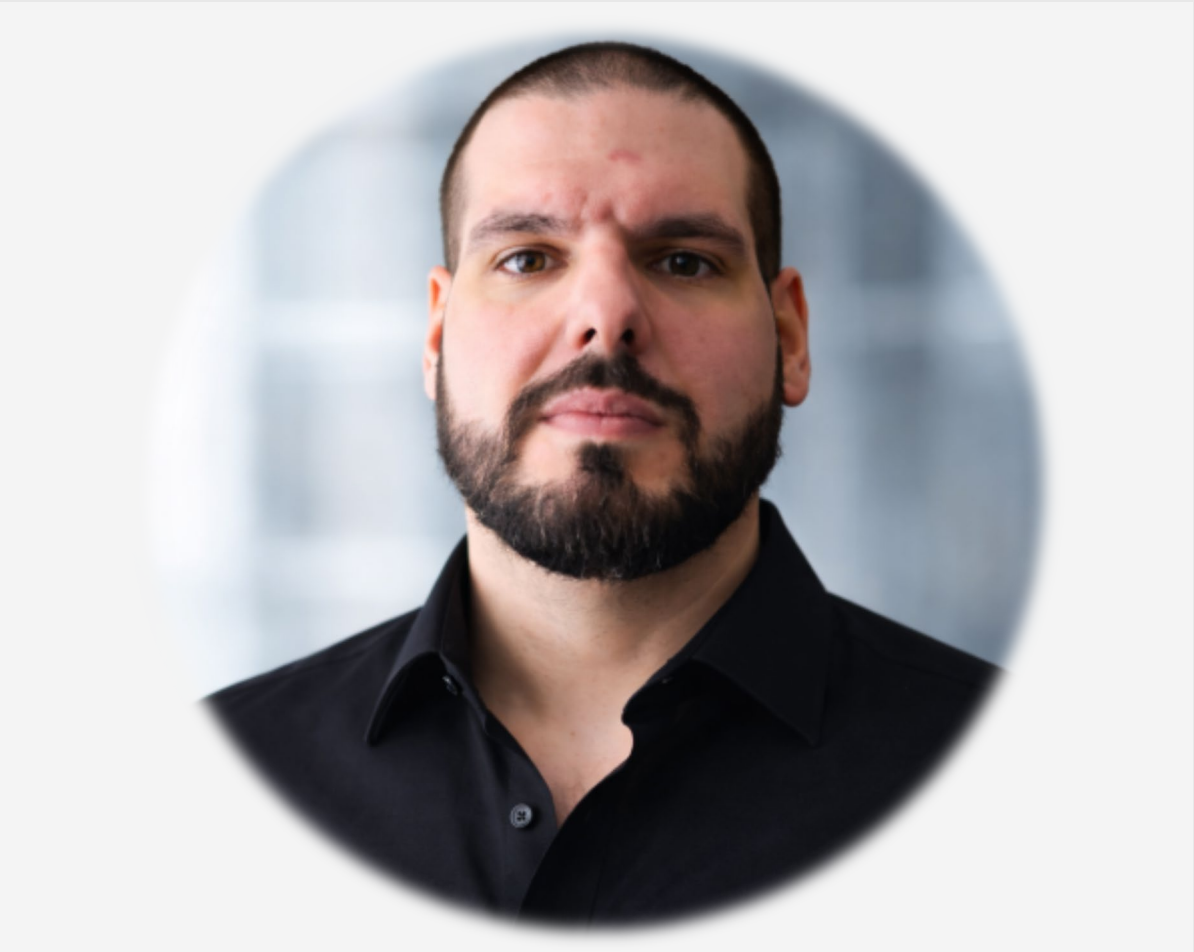
# Dispatching with Scripts & Formulas

**Presenters: Andrew B. & Heather C.**

Dive into dispatch scripting and formula logic that drive consistency and accuracy. We'll cover best practices for building scripts that support agents, improve response times, and reduce errors in high-volume environments.



# Dispatch Scripts with Andrew



A circular event poster for 'SNUG ON THE ROCKS'. At the top, it says 'TEAM SNUG' with a star icon and 'Startel National Users Group' below it. Two blue and yellow parrots wearing headphones are shown holding margaritas. The main text 'SNUG ON THE ROCKS' is in a large, white, hand-drawn font. Below that, it says 'April 12-15th MARGARITAVILLE' and 'Hotel NASHVILLE, TN'. At the bottom, there are two red electric guitars. The poster is surrounded by a circular border with the text 'Chilling in Margaritaville' on the left and 'Innovating for the Future' on the right. At the very bottom is the 'STARTEL' logo with a star icon.

# Why Auto Dispatch Scripts Matter

The Auto Dispatch Script feature is typically used in conjunction with the following Client Maintenance Options:

- Auto Script Dispatch on Save
- Auto Script Dispatch on Deliver

For Sites utilizing a Dispatcher → Auto Script Dispatch on Time Delay.

Auto Dispatch Scripts ensure that the correct dispatch script is run automatically when an IntelliForm is saved or delivered.

**NOTE:** *Auto Dispatch Scripts can also be triggered by IntelliForm Dispatch Actions set to use a specific Dispatch Script.*



# Why Auto Dispatch Scripts Matter

## What it Solves:

- Removes manual dispatching
- Ensures Consistency
- Reduces agent decisions & interpretations

## How it's triggered:

- On Save
- On Deliver
- On Time Delay
- Dispatch Actions

System determines the correct script automatically.



# How the System Determines the Dispatch Script

When an IntelliForm invokes an Auto Dispatch Script, the following 4 sets of logic are applied:

1. Member vs. Client Dispatch Script
2. Time, Day of Week, and Holiday Filtering
3. Category, Presence, Member, and Form Name Tests
4. Points and Priority

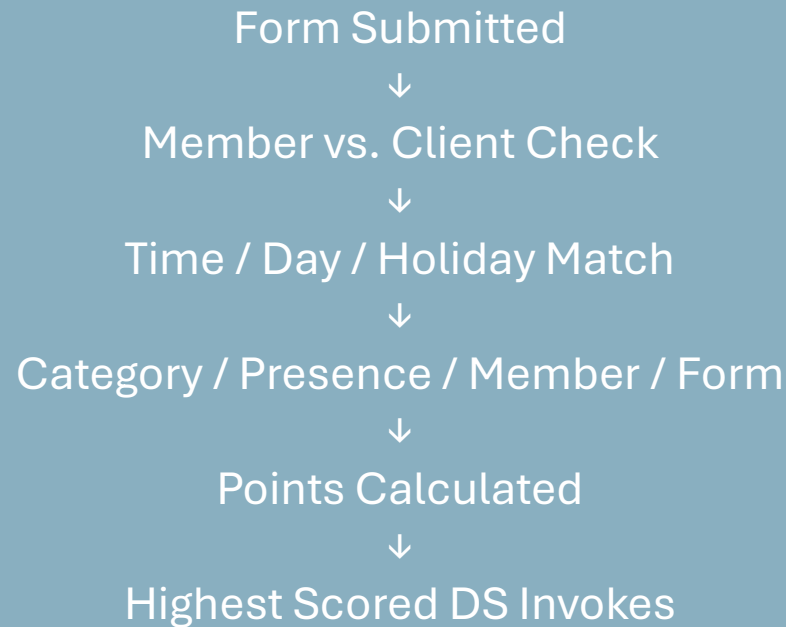
**NOTE:** *if one of these items are not relevant, it is skipped and will have no bearing on which script is selected.*



# How the System Determines the Dispatch Script

## Scoring System (simplified)

- Holiday → highest
- Form → high
- Member/Presence → medium
- Category → low
- Time/Day → baseline



## Scoring System (points)

- Holiday → 100,000
- Form → 10,000
- Member → 1,000
- Presence → 100
- Category → 10
- Time/Day → 1

Multiple factors are evaluated – not just one condition.



# How Script Selection Is Determined (Example)

Script 1:

Time → +1

Holiday → +100,000

Form → +10,000

Total : 110,001

Script 2:

Time → +1


Holiday → +100,000

Presence → +100

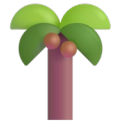
Total : 100,101

Script 1 will invoke because of the total accumulated points.



A close-up shot of a woman with long dark hair, looking slightly to the right with a wide-eyed, open-mouthed expression of surprise or excitement. She is in a kitchen, with wooden cabinets and a white countertop visible in the background. The lighting is warm and indoor.

But wait there's more!



# Scripts + Formulas: Working Together

## Dispatch Scripts

- Start the workflow
- Control execution

## Formulas

- Evaluate conditions
- Determine routing
- Enforce protocol

Call Comes In



Formula Evaluation



Dispatch Script  
Executes



Workflow Behavior

Scripts start the workflow → Formulas determine what happens next



# Formulas with Heather



A vibrant event poster for 'SNUG ON THE ROCKS'. At the top, two blue and yellow parrots wearing headphones hold margaritas. Above them is the 'TEAM SNUG' logo with a star and the text 'Startel National Users Group'. The central text 'SNUG ON THE ROCKS' is written in a large, white, brush-stroke font. Below this, it says 'April 12-15th MARGARITAVILLE Hotel NASHVILLE, TN' with two red guitar icons. The background is a circular image of a city skyline at sunset. Curved text on the sides reads 'Chilling in Margaritaville' and 'Innovating for the Future'. At the bottom is the 'STARTEL' logo with a star.



# Time-Based Logic (TOD Notes & Instructions)

Time-based formulas allow your system to adjust behavior based on when a call is received — ensuring the right instructions or OnCall routing are applied automatically.

Whether it's weekday vs. weekend handling or after-hours escalation, TOD logic removes the need for agents to interpret timing rules on the fly.

Instead of relying on memory or manual checks, the system evaluates the date and time and delivers exactly what's needed in that moment — improving accuracy and keeping workflows consistent across every shift.





# Letting the System Handle Timing

What the system looks at:

- Day of Week
- Time of Day
- Call Type

What the system decides:

- Instructions
- OnCall Routing
- Restrictions

Call Comes In



Check Day/Time/Type



Apply Logic  
(DOH/AOH/WK)



Return  
Message/Routing

IF:

- Btw Mon-Fri
- DOH 7-7
- Emergency

THEN:

- Advise DOH  
Instructions
- Advise OnCall

Removes Guesswork – Ensures Consistency – Real-time Decisions





# Conditional Routing & Protocol Control

Conditional logic is where your workflows begin to truly guide the agent. Using “if/then” structure, formulas can evaluate inputs — such as call type, urgency, or selections made within the form — and determine the appropriate next step.

This allows you to enforce protocols directly within the workflow, ensuring calls are handled consistently regardless of who is taking them.

Rather than leaving room for interpretation, conditional routing creates a controlled path that supports agents while reducing variability and error.





# Letting the System Enforce Protocol

What the system looks at:

- Dispatch Type {DS}
- Location {BD}
- Time {CT}
- Qualification {P.Q}
- Company {I.COMP}

What the system decides:

- Message to Agent
- Dispatch/Escalation
- Restrictions
- Protocol Enforcement

IF:  
Emergency  
Hospital  
AOH  
Current PT

Call Comes In  
↓  
Evaluates Agent Inputs  
↓  
Apply Logic  
(If \_, Then \_)  
↓  
Determine Protocol

THEN:  
Provide ER  
Instructions for  
Current PTs

Removes Guesswork – Ensures Consistency – Real-time Decisions





# Value Cleanup for Dispatching

Value cleanup formulas play a critical role in making dispatch workflows reliable. By refining or standardizing values behind the scenes, these formulas ensure that Dispatch Script menus and routing logic are triggered correctly every time.

They can be used to limit menu options to only what's relevant, or to transform one value into another that drives downstream behavior — whether within a script or another field.

This behind-the-scenes cleanup reduces noise, prevents mismatches, and allows your system to make clean, confident routing decisions without relying on perfect agent input.





# Making Dispatch Logic Work Every Time

What the system looks at:

- The Raw Input by the Agent
  - Menu List(s)
  - Manual Input(s)

What the system decides:

- Cleans the Output
  - Specific DS Menu Item(s)
  - Specific OnCall Category

Area A – AZ  
Area C – CT  
Area D – DW  
Area F – FL  
Area G & H - NEW

Call Input  
↓  
Raw Value Entered  
↓  
Cleanup Formula Applied  
↓  
Standardized Value  
↓  
Used for Dispatch Logic

Area A  
Area C  
Area D  
Area F  
Area G & H

Prevents Routing Errors – Standardizes Data – Ensures Consistency



# Bringing it Together

When formulas are used alongside Dispatch Scripts — especially within Dispatch Script menu structures — they create a seamless, system-driven workflow.

Time-based logic sets the context, conditional routing defines the path, and value cleanup ensures everything connects correctly.

Together, these elements allow the system to consistently determine the right outcome, reducing manual decision-making and ensuring dispatching works the way it was designed — every single time.

***“The goal isn’t to make agents think more — it’s to let the system think for them, so they can focus on handling the call.”***



# QUESTIONS:

*please hold until the end of  
the day's presentations!*

**TEAM SNUG**  
Startel National Users Group

*Chilling in Margaritaville*

*Innovating for the Future*

**SNUG ON THE ROCKS**

April 12-15th  
**MARGARITAVILLE**  
Hotel  
NASHVILLE, TN

**STARTEL**

The logo is a circular graphic with a sunset cityscape background. Two blue and yellow parrots wearing headphones are perched on the top edge, each holding a margarita. The text 'SNUG ON THE ROCKS' is written in a large, white, hand-drawn font across the center. Below it, the dates 'April 12-15th' and the location 'MARGARITAVILLE Hotel NASHVILLE, TN' are displayed. At the bottom, two red electric guitars are shown. The StarTel logo is at the very bottom.