

Operations (Dispatch) - New Split Order Feature Available (14567)[Enhancement]

Last Modified on 01/26/2023 10:08 am EST

A new Split Order feature has been added to Service Records in Dispatch. Split Orders are manually created when a (parent) work order has an uncompleted task (such as returning the yard box back to the site) and completing that task requires a new work order to be created. Split orders act the same as the work order they are split from and can be used to schedule and record servicing details. However, a split order can not be posted unless the parent work order is in either a billed or posted status.

Split Orders

Create a Split Order: A Split Order icon displays at the top of the Service Record. Selecting this will open the 'Split Service Record' popup to create and process a split.

The screenshot displays the 'EDIT SERVICE RECORD' interface. At the top, a table lists work order details:

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE	MATERIAL
4357172	1	10 Yard Trash Service	10YRO	RO_DUMPRET	Scheduled Service	TRASH

Below the table, a 'Split Order' icon (a green circle with a white 'S') is highlighted with a red box. A red arrow points from this icon to a 'SPLIT SERVICE RECORD' popup window. The popup contains the following fields:

- SCHEDULED DATE: 12/29/22 Thursday
- ORDER TYPE: (dropdown menu)
- ROUTE: 11-301
- ORDER NOTES: (text area)
- PROCESS SPLIT button

The main interface also shows a 'Charges' section with a table of charges:

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE
0		0	0	Unit	Disposal Fees Trash
0		0	0	Haul	Haul Fee

At the bottom of the interface, there is a 'SAVE' button and a 'Select Print Format' dropdown.

Parent Work Order: After a Split has been processed, a number '1' will display for the original 'parent' work order. Click on the number icon to open the Split Order linked to it.

Child 'Split' Order: When viewing the Split Order (child) the Back icon displays below the Split Order icon. Select 'Back' to return to the parent work order.

EDIT SERVICE RECORD

HARDIN, TX 77575

CREATED BY

ORDER REASON

SVC NOTE TRASH

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE
5111184	1	30 Yard Open Top Service	30YD	RO_DUMPRET	Scheduled Service

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE ROUTE SEQUENCE DESTINATION / ORIGIN

01/03/23 Tuesday DAY 302 0

WORK STATUS EXCEPTION REASON POSTING STATUS

Scheduled Pending

Parent WO

Completion Data Charges Disposal

Charges must match Equipment

Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY
1		1	1

EDIT SERVICE RECORD

Example Account
1234 Washington Ave
HARDIN, TX 77575

CREATED BY

ORDER REASON

SVC NOTE TRASH

WORK ORDER	QTY	SERVICE CODE	EQUIPMENT	WORK TYPE	ORDER TYPE
5413214	1	30 Yard Open Top Service	30YD	RO_Return	Split Order

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE ROUTE SEQUENCE DESTINATION / ORIGIN

01/04/23 Wednesday DAY 302 0

WORK STATUS EXCEPTION REASON POSTING STATUS - PARENT MUST BE POSTED

Scheduled Pending

Child WO

Completion Data Charges Attachments Labels Photos

Charges must match Equipment

Charges must match Material

WO MINIMUM

CALCULATE QTY AND DISCOUNT

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM	CHARGE CODE	PER UNIT	VENDOR RATE	MINIMUM TYPE	MINIMUM	TOTAL
1		1	1	Service	Roll Off Haul	\$ 495.00 S...		None		\$ 495.00

Pathway: Operations > Dispatch > Services List > Service Record