Create a Split Order

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Pathway: Accounts > Search > Work Order/Invoice/Reference/PO

The following article details how to create split orders. Split Orders are 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.

Permissions

The following permissions are required to create a split work order:

Permission ID	Permission Name
88	Dispatch

Prerequisites

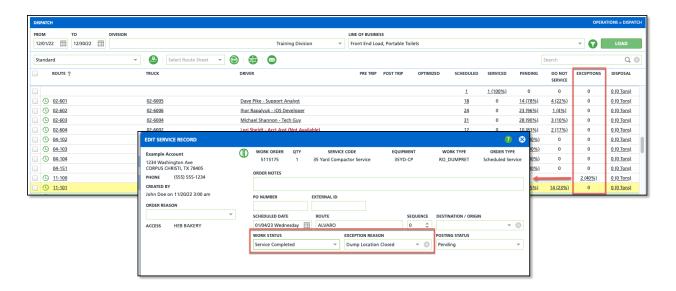
Consider reviewing the *Split Order Setup* article for setup requirements.

Split Order Process (Driver to Dispatch)

When a driver marks a stop with an exception AND includes an Exception Reason, the stop will display under the Exceptions column in Dispatch. In addition, the work order's *Work Status* for a stop marked with an exception will update to match the '*WO New Status*' for the selected reason.



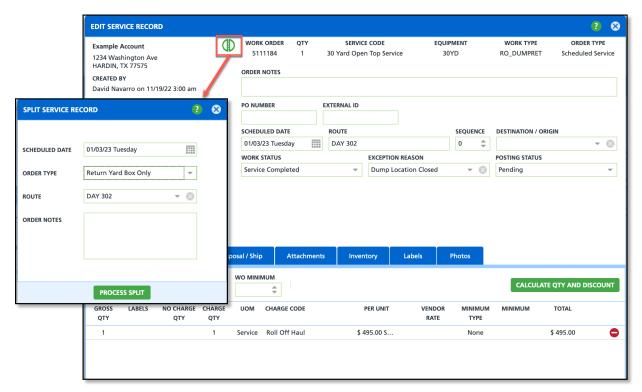
In the example below, the driver has marked the stop with an exception and selected 'Dump Location Closed' as the exception reason. Prior setup for the Reason Code updated the Work Status field to 'Service Completed' and populated the Exception Reason field.



Create a Split Order

 $1. \ \ Select the \ value from \ the \ Exceptions \ column \ to \ open \ the \ Services \ List.$

- 2. Select the Service Record you would like to create a split order for.
- 3. Click on the Split Order icon from the top of the screen. Upon selection, the Split Service Record popup editor will display.



- 1. Enter a **Scheduled Date** to schedule the service for.
- 2. Select an **Order Type** from the drop down.
- 3. Select a **Route** for the service to be added to.
- 4. Enter any Order Notes for the driver.
- 5. Click Process Split.

Parent/Child Records

Once a split order has been created, a parent/child relationship between the two records is formed. Because of this relationship, a split order can not be posted unless the parent work order is in a posted or billed status. Icons to navigate between the two records displays at the top of each work order.

