

Create a Split Order

Last Modified on 03/20/2024 9:27 am EDT

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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.

The screenshot displays the Dispatch system interface. At the top, there are filters for 'FROM' (12/01/22), 'TO' (12/30/22), 'DIVISION' (Training Division), and 'LINE OF BUSINESS' (Front End Load, Portable Toilets). Below this is a table of work orders with columns: ROUTE, TRUCK, DRIVER, PRE TRIP, POST TRIP, OPTIMIZED, SCHEDULED, SERVICED, PENDING, DO NOT SERVICE, EXCEPTIONS, and DISPOSAL. An 'EDIT SERVICE RECORD' modal window is open, showing details for a work order (5115175) with quantity 1. The modal includes fields for 'WORK STATUS' (set to 'Service Completed') and 'EXCEPTION REASON' (set to 'Dump Location Closed'). Other fields include 'SCHEDULED DATE' (01/04/23), 'ROUTE' (ALVARO), 'SEQUENCE' (0), and 'POSTING STATUS' (Pending).

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.

EDIT SERVICE RECORD

Example Account
1234 Washington Ave
HARDIN, TX 77575
CREATED BY
David Navarro on 11/19/22 3:00 am

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: 01/03/23 Tuesday ROUTE: DAY 302 SEQUENCE: 0 DESTINATION / ORIGIN:

WORK STATUS: Service Completed EXCEPTION REASON: Dump Location Closed POSTING STATUS: Pending

Proposal / Ship Attachments Inventory Labels Photos

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	Service	Roll Off Haul	\$ 495.00 S...		None		\$ 495.00

SPLIT SERVICE RECORD

SCHEDULED DATE: 01/03/23 Tuesday

ORDER TYPE: Return Yard Box Only

ROUTE: DAY 302

ORDER NOTES

PROCESS SPLIT

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.

EDIT SERVICE RECORD

LIBERTY COUNTY PRECINCT #2 B
588 COUNTY ROAD 2010
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

1
Select to open child WO

Parent WO

Completion Data Charges 1 Disposal

Charges must match Equipment
 Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY
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 1 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	Service	Roll Off Haul	\$ 495.00 S...		None		\$ 495.00

Return to parent WO