

Create a Split Order

Last Modified on 02/04/2025 12:48 pm PST

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.

DISPATCH

FROM: 12/01/22 TO: 12/30/22 DIVISION: Training Division LINE OF BUSINESS: Front End Load, Portable Toilets

Standard Select Route Sheet

Search

ROUTE	TRUCK	DRIVER	PRE TRIP	POST TRIP	OPTIMIZED	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS	DISPOSAL
02-601	02-6005	Dave Pike - Support Analyst				1	1 (100%)	0	0	0	0 (0 Tons)
02-602	02-6006	Ihor Ranaivuk - iOS Developer				18	0	14 (78%)	4 (22%)	0	0 (0 Tons)
02-603	02-6004	Michael Shannon - Tech Guv				24	0	23 (96%)	1 (4%)	0	0 (0 Tons)
02-604	02-6002	Luci Shields - Acct Asst (Not Available)				31	0	28 (90%)	3 (10%)	0	0 (0 Tons)
04-102						12	0	10 (83%)	2 (17%)	0	0 (0 Tons)
04-103								0	0	0	0 (0 Tons)
04-104								0	0	0	0 (0 Tons)
04-151								0	0	0	0 (0 Tons)
11-100								0	0	0	0 (0 Tons)
11-101								0	0	2 (40%)	0 (0 Tons)

EDIT SERVICE RECORD

Example Account
1234 Washington Ave
CORPUS CHRISTI, TX 78405
PHONE (555) 555-1234

WORK ORDER 5115175 QTY 1 SERVICE CODE 35 Yard Compactor Service EQUIPMENT 35YD-CP WORK TYPE RO_DUMPRET ORDER TYPE Scheduled Service

ORDER NOTES

PO NUMBER EXTERNAL ID

SCHEDULED DATE 01/04/23 Wednesday ROUTE ALVARO SEQUENCE 0 DESTINATION / ORIGIN

WORK STATUS Service Completed EXCEPTION REASON Dump Location Closed 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.

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.

LIBERTY COUNTY PRECINCT #2 B
588 COUNTY ROAD 2010
HARDIN, TX 77575

CREATED BY

ORDER REASON

SVC NOTE TRASH

1

Select to open child WO

EDIT SERVICE RECORD

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 1

Disposal

+ Charges must match Equipment

Charges must match Material

GROSS QTY	LABELS	NO CHARGE QTY	CHARGE QTY	UOM
1			1	Se

Example Account
1234 Washington Ave
HARDIN, TX 77575

CREATED BY

ORDER REASON

SVC NOTE TRASH

Return to parent WO

EDIT SERVICE RECORD

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

Related Articles

[Split Order Setup](#)