


Split Order Setup

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The following article details the behind-the-scenes setup required to control split order functionality. 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.



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.**

Permissions

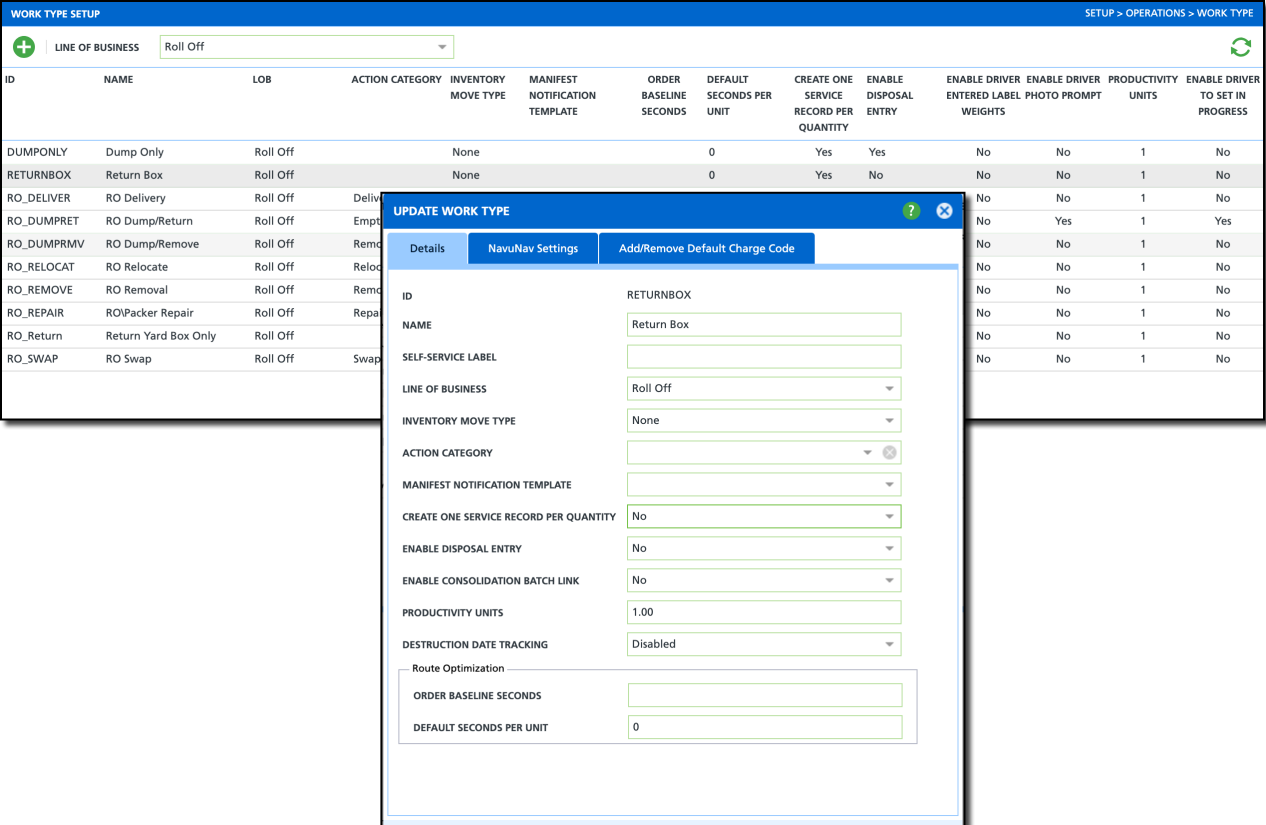
The following permissions are required to complete the setup of Split Order functionality:

Permission ID	Permission Name
24	Setup / Operations
120	Setup / System and Security

Setup: Work Type

Pathway: *Setup > Operations > Work Type*

Create a 'Work Type' for each line of business a split order may be created in. In the image example below, a 'Return Box' Work Type was created.



The screenshot displays the 'WORK TYPE SETUP' interface. At the top, there is a 'LINE OF BUSINESS' dropdown menu set to 'Roll Off'. Below this is a table with columns: ID, NAME, LOB, ACTION CATEGORY, INVENTORY MOVE TYPE, MANIFEST NOTIFICATION TEMPLATE, ORDER BASELINE SECONDS, DEFAULT SECONDS PER UNIT, CREATE ONE SERVICE RECORD PER QUANTITY, ENABLE DISPOSAL ENTRY, ENABLE DRIVER ENTERED LABEL WEIGHTS, ENABLE DRIVER PHOTO PROMPT, PRODUCTIVITY UNITS, and ENABLE DRIVER TO SET IN PROGRESS. The table lists various work types such as DUMPONLY, RETURNBOX, RO_DELIVER, etc.

An 'UPDATE WORK TYPE' modal window is open, showing the configuration for the 'RETURNBOX' work type. The fields are as follows:

- ID: RETURNBOX
- NAME: Return Box
- SELF-SERVICE LABEL: (empty)
- LINE OF BUSINESS: Roll Off
- INVENTORY MOVE TYPE: None
- ACTION CATEGORY: (empty)
- MANIFEST NOTIFICATION TEMPLATE: (empty)
- CREATE ONE SERVICE RECORD PER QUANTITY: No
- ENABLE DISPOSAL ENTRY: No
- ENABLE CONSOLIDATION BATCH LINK: No
- PRODUCTIVITY UNITS: 1.00
- DESTRUCTION DATE TRACKING: Disabled
- Route Optimization: (checked)
- ORDER BASELINE SECONDS: (empty)
- DEFAULT SECONDS PER UNIT: 0

Setup: Work Type Event Class

Pathway: Setup > Operations > Work Type Event Class

After adding Work Types, create a Work Type Event Class. It is important that when the Work Type Event Class is created, 'Split Order' is populated in the Event Type field.

ID	NAME	LINE OF BUSINESS	LINKED SERVICE CODES
1000	Roll off Services	Roll Off	24
1001	Front Load Services	Commercial	26
1002	Residential Services	Residential	16
1004	Residential - Hand Throw	Residential	2
1005	Landfill	Landfill	0
1006	Medical Waste	Medical Waste	2
1007	Transfer	Medical Waste	1
1008	Scale Inbound	Scale	1
1009	Document Destruction	Document Destruction	2
1010	Hazardous Waste Services	Hazardous Material	1
1011	MISC	Miscellaneous	1
1012	SCALE_OUT	Scale	1

EVENT CLASS	EVENT TYPE	WORK TYPE	ALLOW SELF-SERVICE ORDERING	NOTE
Roll off Services	On Call	RO Delivery	No	
Roll off Services	On Call	RO\Packager Repair	No	
Roll off Services	Scheduled Service	Return Box	No	
Roll off Services	On Call	Dump Only	No	
Roll off Services	Add Service	Return Yard Box Only	No	
Roll off Services	Quantity Increase			
Roll off Services	Quantity Decrease			
Roll off Services	End Service			
Roll off Services	On Call			
Roll off Services	On Call			
Roll off Services	Split Order			
Roll off Services	Split Order			
Roll off Services	Split Order			

EVENT	EVENT TYPE	WORK TYPE	ALLOW SELF-SERVICE ORDERING	NOTE
Roll off Services	Split Order	Return Box	No	

Create a Split Order Event Type

1. Select the Work Type from the upper grid to display the Work Type Event Class below.
2. From **Work Type Event Class**, select the green '+' icon.
3. Select 'Split Order' from the **Event Type** drop down.
4. Select the previously created Work Type from the **Work Type** drop down.
5. Enter a **Note** for internal referencing (optional).

Setup: Reason Code

Pathway: Setup > System > Reason Code

Review the Reason Codes created for Service Exceptions. If needed, add additional Reason Codes for the driver to select indicating the reason for a service exception.



When a driver marks a stop with an exception AND includes a Reason Code, the stop will display under the Exceptions column in Dispatch and the work order will update to match the 'WO New Status' for the selected Reason Code. **Otherwise**, if the drivers marks the stop with an exception and does not include a reason code the stop will display in Dispatch under the Do Not Service column as 'Not Serviced.'

REASON CODE SETUP
SETUP > SYSTEM > REASON CODE

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TYPE Service Exception

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TYPE ↑	LINE OF BUSINESS	REASON CODE ↑	NAME	GL ACCOUNT	DISPLAY IN MOBILE	RESULT	EXTERNAL ID	ACTIVE
Service Exception	Commercial	1235VCEXEC	Inactive Service Exception		No	Not Serviced		No
Service Exception	Residential	BLCART	Blocked Cart		Yes	Not Serviced		Yes
Service Exception	Commercial	FLBLOCKED	Bin Blocked		Yes	Not Serviced		Yes
Service Exception	Commercial	FLOVRD	Bin Overloaded		Yes	Not Serviced		Yes
Service Exception	Commercial	FLRECCONT	Recycling Contaminated		No	Not Serviced		Yes
Service Exception	Residential	RENOCAOUT	No Trash Out		Yes	Not Serviced		Yes
Service Exception	Residential	RERECCONT	Recycling Contaminated		Yes	Not Serviced	321231	Yes
Service Exception	Residential	RESOVERL	Cart/Bin Overloaded		Yes	Not Serviced		Yes
Service Exception	Roll Off	Return	Dump Location Closed		Yes	Service Completed		Yes
Service Exception	Roll Off	ROBLOCKED	Blocked		Yes	Not Serviced		Yes
Service Exception	Roll Off	ROINYARD	Box Left in Yard		No	Service Completed		Yes
Service Exception	Roll Off	ROOVERLD	Roll Off Overloaded		Yes	Service Completed		Yes
Service Exception	Residential	RSDRVCNCRN	DRIVER CONCERN		Yes	Service Completed		Yes

EDIT REASON CODE
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✕

TYPE Service Exception

ID Return

NAME Dump Location Closed

EXTERNAL ID

DISPLAY IN MOBILE Yes

LINE OF BUSINESS Roll Off

WO NEW STATUS Service Completed

ACTIVE Yes