

Splitting a Sales Order

Last Modified on 09/14/2023 4:52 pm EDT

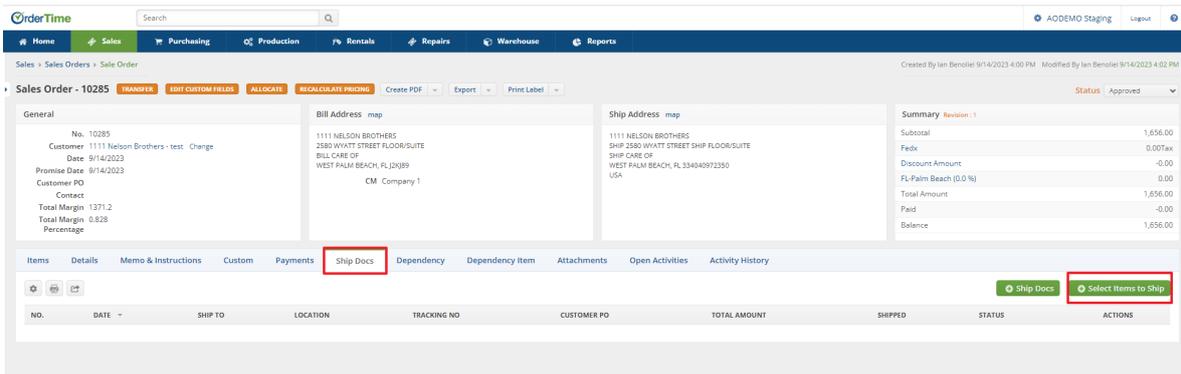
Overview

A Sales Order is an order issued by a business or sole trader to a customer. A sales order may be for products and/or services. The Sales Order is a confirmation document sent to the customers before delivering the goods or services. You now can use the **Split** function to move left over Open Quantities from one Sales Order to a new Sales Order.

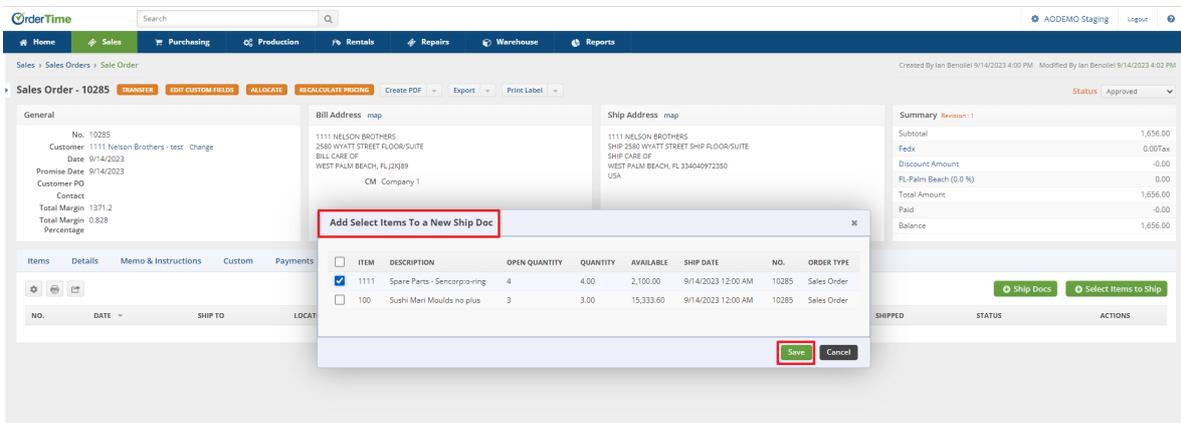
- Navigate to Company Preferences and Select the Sales section and then the Advanced tab.
- Check the box towards the bottom of the page titled "Enable Splitting a Sales Order".

The screenshot shows the OrderTime web application interface. The top navigation bar includes Home, Sales, Purchasing, Production, Rentals, Repairs, Warehouse, and Reports. The 'Company Preferences' page is open, with the 'Sales' section selected in the left sidebar. The 'Advanced' tab is active, showing various configuration options. The checkbox for 'Enable Splitting a Sales Order' is checked and highlighted with a red box. Other visible options include 'Limit items for selling to items that have an item # listed for the current customer', 'Use last customer price (ignores pricing levels)', 'When adding items to sales documents show all price level pricing, including price levels assigned to other customers', 'Move attachments from quote to sales order on conversion', 'Apply price levels to Kit selections', 'Enable generating vendor RFQs from quotes', 'Require Ship Method', 'Show kit selections on sales orders and quotes', 'Calculate tax rates based on zip codes instead of Item Sales Tax', 'When printing a form template with styles, show the variants as rows instead of in matrix format', 'Enable creating a transfer from a sales order', 'Transferring from a sales order is used for consignment', 'Use sales order promise dates on linked work orders', 'Default Location' (set to HQ), 'Enable Location lookup based on Shipping Regions', 'Highlight line items with inventory deficiencies', 'Enable charging additional fees on orders', 'When adding an item to a quote or sales order, increment the quantity instead of adding a new line no.', 'Validate Shipping Address', 'Enable Allocation', 'Automatically allocate when status is changed to approved', 'Disable Consignments', 'Sales Order promise dates should be the date it is converted from a quote', 'Allow recalculating pricing on Quotes & Sales Orders', 'Load Can Make on Sales Order and Quote Line Items', 'Enable Proforma Invoices', 'Enable Catalog Ordering - beta', and 'Update customer ship to address when closing a sales order or quote'. There are also dropdown menus for 'Default status for Sales Orders coming off hold' and 'Status Change After Email' (Sales Order and Quotes).

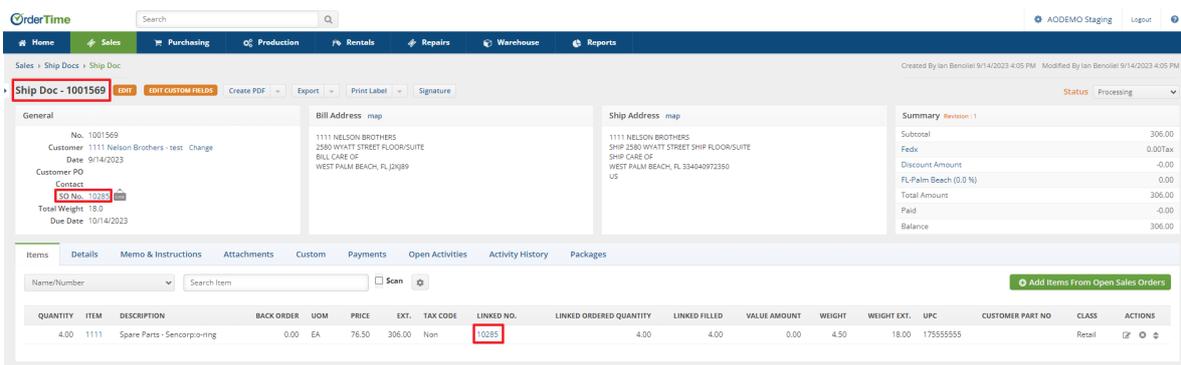
- When you Create a Sales Order that has multiple line items, make sure it goes through the Approval process. In this scenario you are only choosing to Ship select items and then split the Sales Order. Go to the Ship Docs tab on the Sales Order and then click the green "Select Items to Ship" button towards the right hand side of the screen.



- After selecting the "Select Items to Ship" button the system will present the "Add Select Items to a New Ship Doc" window. Check the box for the items you want on the new Ship Doc and click the green Save button.



- The system will then present you with the new Ship Doc and a link back to the original Sales Order.



- Returning to the original Sales Order you will now see the Split button as an option towards the top of the page and the newly created Ship Doc within the Ship Docs tab.

OrderTime

Home Sales Purchasing Production Rentals Repairs Warehouse Reports

Sales > Sales Orders > Sale Order

Sales Order - 10285 **TRANSFER** **EDIT CUSTOM FIELDS** **ALLOCATE** **SHIP** Create PDF Export Print Label Status: Approved

General: No. 10285, Customer: 1111 Nelson Brothers - test, Date: 9/14/2023, Promise Date: 9/14/2023, Customer PO, Contact, Total Margin: 1,371.20, Total Margin Percentage: 83.0%

Bill Address map: 1111 NELSON BROTHERS, 2580 WYATT STREET FLOOR/SUITE, BILL CARE OF, WEST PALM BEACH, FL, 33409, CM Company 1

Ship Address map: 1111 NELSON BROTHERS, SHIP 2580 WYATT STREET SHIP FLOOR/SUITE, SHIP CARE OF, WEST PALM BEACH, FL, 334040972350, USA

Summary Revision: 1: Subtotal 1,656.00, FedEx 0.00Tax, Discount Amount -0.00, FL-Palm Beach (0.0%), Total Amount 1,656.00, Paid -0.00, Balance 1,656.00

Items Details Memo & Instructions Custom Payments **Ship Docs** Dependency Dependency Item Attachments Open Activities Activity History

NO.	DATE	SHIP TO	LOCATION	TRACKING NO	CUSTOMER PO	TOTAL AMOUNT	SHIPPED	STATUS	ACTIONS
1001569	9/14/2023	Primary	HQ			306.00		Processing	

Total Records: 1

- The original Sales Order will now reflect that the items that have been selected for your Ship Doc are showing as "Cleared" and no longer available to allocate from this Sales Order.

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Items Details Memo & Instructions Custom Payments Ship Docs Dependency Dependency Item Attachments Open Activities Activity History

GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	UOM	DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED	OPEN QUANTITY	DROP SHIP	ITEM TYPE	TAGS	ACTIONS
Parts Group		1	1111	Spare Parts - Sencorpio-ring	4.00	EA	15.0 %	90.00	76.50	306.00	2,096.00	1,632.00	0.00	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	Part		
21 Solution		2	100	Sushi Mari Moulds no plus	3.00	EA	10.0 %	500.00	450.00	1,350.00	15,333.60	15,035.10	0.00	<input type="checkbox"/>	3.00	<input type="checkbox"/>	Part	test tag 3, test tag 4, 100tag	

- Selecting the Split button will present the Split Sales Order window. The system requires a Customer PO to be entered to move forward. If you have a Customer PO you can enter it or you can create a new one for your own records. If you have the setting on to force unique Customer POs, make sure that this new one is completely unique. The Date field will default to the date you are completing the process. Click the green Split button.
- As soon as you click on the green Split button, the system is going to take every line item that is left over with Open Quantities on the current Sales Order, clear it, and add it to a New Sales Order.

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Items Details Memo & Instructions Custom Payments **SHIP DOCS** Dependency Dependency Item Attachments Open Activities Activity History

Split Sales Order

Customer PO:

Date: 9/14/2023

Split Cancel

GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	UOM	DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED	OPEN QUANTITY	DROP SHIP	ITEM TYPE	TAGS	ACTIONS
Parts Group		1	1111	Spare Parts - Sencorpio-ring	4.00	EA	15.0 %	90.00	76.50	306.00	2,096.00	1,632.00	0.00	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	Part		
21 Solution		2	100	Sushi Mari Moulds no plus	3.00	EA	10.0 %	500.00	450.00	1,350.00	15,333.60	15,035.10	0.00	<input type="checkbox"/>	3.00	<input type="checkbox"/>	Part	test tag 3, test tag 4, 100tag	

- The system now generates a New Sales Order with the remaining line item(s) and the original Sales Order is now Closed.

OrderTime

Home Sales Purchasing Production Rentals Repairs Warehouse Reports

Sales > Sales Orders > Sale Order

Sales Order - 10286

General

Bill Address map

Ship Address map

Summary Revision: 1

GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	UOM	DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED	OPEN QUANTITY	DROP SHIP	ITEM TYPE	TAGS	ACTIONS
21 Solution		1	100	Sushi Mari Moulds no plus	3.00	EA	10.0 %	500.00	450.00	1,350.00	15,333.60	15,038.10	0.00	<input type="radio"/>	3.00	<input type="radio"/>	Part	test tag 3, test tag 4, 100tag	

OrderTime

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Sales > Sales Orders > Sale Order

Sales Order - 10285

General

Bill Address map

Ship Address map

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GROUP	IMAGE	LINE NO.	ITEM	DESCRIPTION	QUANTITY	UOM	DISCOUNT %	STD. PRICE	PRICE	EXT.	AVAILABLE	NET AVAILABLE	ALLOCATED	CLEARED	OPEN QUANTITY	DROP SHIP	ITEM TYPE	TAGS	ACTIONS
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21 Solution		2	100	Sushi Mari Moulds no plus	3.00	EA	10.0 %	500.00	450.00	1,350.00	15,333.60	15,038.10	0.00	<input checked="" type="radio"/>	0.00	<input type="radio"/>	Part	test tag 3, test tag 4, 100tag	

This is a very specific function that has multiple use-cases. The most common of which are companies that simply want to get products out as quickly as possible regardless of how many shipments must be done. Sometimes in the Purchasing process you simply don't have the available quantities for items ready to go. In this case you want to make sure you hit the Promise Date for at least some of the Items. By creating a Ship Doc with at least some of the Line Items that are available, and Splitting the rest off into a separate Sales Order you can create a workflow where everything keeps moving.