© 2014 CDK Global, LLC. All rights reserved, including translation in the United States of America, as well as in Canada and other countries of the International Copyright Union. All rights reserved under Pan-American Copyright Conventions and under the Universal Copyright Convention. No part of these materials may be reproduced, translated, or appropriated in any form or by any means (including electronic, mechanical, or other, such as photocopying, recording, or any information storage and retrieval system) without permission in writing from the publisher. Inquiries should be addressed to:

CDK Global LLC.
1950 Hassell Rd.
Hoffman Estates, Illinois, USA 60169-6308
Attn: Legal Dept.
847.397.1700
# Table of Contents

**Introduction** ........................................................................................................................................................................... 1  
About Warranty Work and Deductibles ................................................................................................................................. 1  
Overview ...................................................................................................................................................................................... 1  
  - Split Repair Order and CDK w.e.b.Suite ................................................................................................................................. 1  
  - Previous Versions of Split Repair Order ................................................................................................................................. 2  
Navigation ..................................................................................................................................................................................... 2  

**Accessing Split Repair Order** .................................................................................................................................................... 3  
CSPO in Advanced Elite ............................................................................................................................................................... 3  
  - The CarInk (Cl) Menu ............................................................................................................................................................... 4  
CSPO in w.e.b.Suite .......................................................................................................................................................................... 5  
Split Repair Order Application Features .................................................................................................................................... 6  

**Setting Up CSPO Defaults** ......................................................................................................................................................... 7  

**Applying Warranty Deductibles to Repair Orders** .................................................................................................................... 9  

**Moving a Closed Labor Line with CSPO** ..................................................................................................................................... 12  
CSPO Line Detail Command ............................................................................................................................................................ 14  

**CSPO Limitations and Restrictions** ......................................................................................................................................... 14  
  - Splitting a Repair Order More Than Once ............................................................................................................................... 14  
  - Splitting a Repair Order with Discounts ................................................................................................................................... 14  

**Opening the Original Repair Order** ......................................................................................................................................... 15  

**Opening the New Repair Order** .............................................................................................................................................. 17  

© December 2014 ADP, Inc.
Notes
Introduction

The Split Repair Order (CSPO) application gives you the ability to take an existing repair order (RO) and split selected labor lines onto a separate RO — allowing you to close one group of repair lines (such as customer-pay lines) at one time and close another group (such as warranty work) at another time.

Note: An RO cannot be split more than one time.

Once an RO is split, you can use Post Final Charges (PFC) or Cashiering (CAS) to close either RO in the usual manner.

The CSPO function works by letting you open an original repair order, select individual repair lines, and move them to a new RO, which will have a distinct RO number that is based on the original number plus a new one-letter suffix.

Once you have moved labor lines from one repair order to a new one, the split cannot be reversed and the RO cannot be split again.

Tip! To adjust shop charges in an RO that you intend to split, first use the procedure to split the RO, then use the CSC command in Print Final Charges (PFC) to change the shop charge in the RO totals window.

A note about Service application compatibility:

- **ROI:** If you are an ROI-only client, CSPO allows you to move any labor line in the CSPO screen.
- **Dispatch/ERO:** If you are a Dispatch or ERO client, CSPO validates that each selected labor line is complete (status C92) before splitting the RO.

Split Repair Order runs on your Service (name-S) application account. The companion setup function, CSPS, also runs on the Service account.

About Warranty Work and Deductibles

The Split Repair Order application allows you to handle warranty work for customers with relative ease. To comply with manufacturer requests for using CSPO, make sure you do not move warranty labor lines from the original RO. Instead, split out and move only the customer-pay lines (and any internal work) to the new repair order.

To deal with warranty deductibles on an RO you want to split, use the standard CDK Service application features to adjust the cost breakdown. To do this you would enter the deductible amount as a miscellaneous charge and reduce the warranty labor line by that same amount, before you split the RO.

For convenience, this guide includes a section describing the procedure. See Applying Warranty Deductibles to Repair Orders on page 9.

Overview

This guide provides information for setting up and using the features of the Split Repair Order application.

Split Repair Order and CDK w.e.b.Suite

As noted in the section on Accessing Split Repair Order on page 3, the CSPO function runs under w.e.b.Suite as well as Advanced Elite. This document describes how to use the application in both environments.
Previous Versions of Split Repair Order

Earlier versions of the CSPO application ran under different function code names in the Advanced Elite environment, including SPO. The function code CSPO replaces any earlier code names used on your CDK system. CSPO also appears on the Car'Ink (CI) menu on all updated CDK systems (in the Service application account).

Navigation

- Make sure that the Caps Lock feature is on.
- Use the arrow keys to move between fields.
- After typing data into a field, press Enter to move to the next field.
- Use F1 to view the extensive online help.
Accessing Split Repair Order

The CSPO function runs on CDK Advanced Elite systems and on w.e.b.Suite 2006 (and higher) systems. This section describes how to access the application in each environment.

The screen and field functionality of Split Repair Order is essentially the same in the Advanced Elite and in the w.e.b.Suite environments except that w.e.b.Suite supports navigation with a mouse and allows you to switch to other windows (for additional CDK w.e.b.Suite functions) without exiting the CSPO application.

CSPO in Advanced Elite

Follow these steps to access CSPO from the User Security Menu, in the CDK Advanced Elite environment.

Log on to your Service (name-S) application account.

At the Function Code field, enter CSPO.

Figure 1. CSPO Function Code

Figure 2. CSPO Screen - Advanced Elite Interface
The Car!nk (CI) Menu

CSPO can also be reached through the CI menu on your Service application account.

**Note.** The CI menu appears on several application accounts (Accounting, F&I, Parts, and so on) and contains a related group of function codes for CDK Car!nk custom applications.

1. Log on to your Service (name-S) application account.
2. At the Function Code field, enter CI.
3. Choose CSPO from the menu.
CSPO in w.e.b.Suite

Follow these steps to access CSPO in the w.e.b.Suite environment.

1. At the Welcome page, enter your user ID and password, and then click **Login**.
2. Open the Menu Navigator panel.

Figure 4. Menu Navigator

3. In the Function field, enter **CSPO**.
   - **OR**-
   In the Menu Tree, open the Service (*name*-S) application group, then open the Car\'nk Menu, and then select **CSPO-Split Repair Order**.
Split Repair Order Application Features

See the following topics for information on CSPO features:

- *Moving a Closed Labor Line with CSPO* on page 12
- *Opening the Original Repair Order* on page 15
- *Opening the New Repair Order* on page 17

See these topics for information related to setting up Split Repair Order and dealing with specific types of ROs that you might want to split:

- *Setting Up CSPO Defaults* on page 7
- *Applying Warranty Deductibles to Repair Orders* on page 9
Setting Up CSPO Defaults

The CSPS function allows you to customize CSPO to suit the needs of your dealership. Before using the Split Repair Order application, review or update the default program settings.

The setup screen controls the suffix that is used to form repair order numbers for new ROs created when the original is split. For example, you may want each new RO created from a split to end with the letter S. (You can use any single letter to distinguish the new RO from the original RO number.)

**Important!** This application no longer supports a Prefix option for distinguishing split repair orders. If your system had previously run a version of Split Repair Order that supported prefixes, and you generated new ROs that used the prefix option, you may encounter error messages that require you to convert the old RO data to the suffix-based format. Contact CDK Car!nk if this is the case.

This screen also defines what Service application data (labor type, op code, and technician number) is automatically applied to any lines moved from an original RO to a new RO. In the new RO, the moved lines retain whatever labor type, op code, and technician they had in the original RO. The three default values allow you to populate the moved lines in the original RO with the required settings, so that you do not have to rebook the original RO in Post Final Charges (PFC) before you close it.

To set up your CSPO defaults:

1. Log on to your Service (name-S) application account.
2. At the Function Code field, enter CSPS.

   **Note.** If you had an earlier version of Split Repair Order installed on your system and you had set up the application to use prefixes for new ROs, the program displays an error message warning you that prefixes are no longer supported. Simply complete the setup screen as described in the remainder of this procedure and save the new settings, if this is the case.

   **Figure 6. Split Repair Order Setup Screen**

   Enter the letter code you want to append to each split repair order to distinguish the new RO from the original RO.
Enter the labor type code to enter on the original RO for any lines that are moved with the Split RO function. You can also select a code using F12.

**Note.** If possible, use an internal labor type in this field. (If you use a customer-pay type for lines split out of an original RO, the customer-pay lines may be counted twice on some Service reports even after they have been moved.)

Enter an op code to apply to lines moved from the original RO.

**Important!** The op code you select here as a default must not have a flat-rate setup in the Service application. Choose a 'generic' op code for RO labor lines that are split with the CSPO routine, and make sure that the Flat Rate Hours and Flat Sale Amount fields for the selected op code are blank.

To review the setups for an op code, use the Update Op Code (UOC) command on your Service (name-S) application account.

Enter a technician number, or press F12 to select a technician number to apply to lines moved from the original RO. (Use a generic technician number for this purpose.)

Press F3=Save/Exit, and then choose Save Changes.
Applying Warranty Deductibles to Repair Orders

Use the instructions and guidelines in this section to make the appropriate adjustments to account for warranty deductibles that apply to ROs that you are going to split with the CSPO routine.

This procedure describes how to add the warranty deductible amount as a miscellaneous charge on a customer-pay repair line.

**Tip!** You can also use this approach to apply charges in which the customer pays a labor installation charge, but does not pay the cost of a part replaced under warranty.

It is recommended that you perform these steps **before** you use CSPO to split the repair order.

**Important!** The functionality in the Split Repair Order application does not support deductibles entered using the ADE command in the Post Final Charges (PFC) routine. Instead of using ADE, use the ASL command as described in the procedure that follows.

Adding a miscellaneous charge for the warranty deductible:

1. Log on to your Service (**name-S**) application account.
2. At the Function Code field, enter **SW** for Service Write-up.
3. At the Function prompt, enter **PFC** for Post Final Charges.
4. Enter your employee number, and then press **Enter** to confirm the name.
5. Enter the repair order number.
6. At the next prompt (the repair order summary listing), press **Enter** to open the RO in the PFC screen.
7. At the Command prompt, enter `ASL` to add a new line.
8. Enter `M` for Miscellaneous Charge.
9. At the Line/RO prompt, enter `RO`.

```
Figure 9. Add New Miscellaneous Charge
```

10. At the Description field, enter `DEDUCTIBLE` or a similar name for the charge.
11. For the Labor Type, enter a Customer Pay Labor Type. Important: verify with your accounting department to determine if deductibles in your state are taxable.
12. Enter the value of the deductible as the Sale Amount, using two decimal places (do not enter the decimal point).
13. Enter `0` (zero) as the Cost Amount.
14. Press `Enter` at the Failure Code field to leave it blank.
15. At the Account field, enter the warranty receivable account number from your chart of accounts.
16. At the Sale Control Number field, enter the original RO number as a control.
17. If your Repair Order function is configured to include the Debit Control Number field, press `Enter` to leave it blank.
18. At the Misc Charges Command prompt, enter `F` to file the charge and return to the PFC screen.
19. To confirm the miscellaneous charge has been added to the repair order, enter `DTO` at the Command prompt.
The MISC row lists the balances for any miscellaneous charges added to the RO.

![Figure 10. Repair Order Totals Window](image1)

1. Review the totals, and then enter E to close the window.
2. Enter F to file and save the repair order.
3. At the All Labor Posted prompt, enter Y if the work has been closed out by the technician, or N if not, in accordance with your usual process.
4. At the RO Number prompt, press Enter.
5. At the Function prompt, enter E.

**Viewing the resulting repair order:**

After you enter a miscellaneous RO line, the repair order screen in Split Repair Order displays it as an ‘S1’ labor line. (Assuming the customer pays the deductible, this is the line you should move if you split the repair order.)

![Figure 11. Deductible Line (example data)](image2)

For information on moving a closed labor line, see *Moving a Closed Labor Line with CSPO* on page 12.
Moving a Closed Labor Line with CSPO

Follow these steps to access CSPO and move labor lines to a new repair order.

1. Log on to your Service (name-S) application account.
2. At the Function Code field, enter CSPO.

![Figure 12. Split Repair Order Screen](image1)

3. At the RO field:
   - Enter a repair order number.
   - OR-
   - Enter the letter T followed by the Service department tag number.
   - OR-
   - Press F12=List to select a repair order from the list of open ROs.

![Figure 13. CSPO Repair Order Selection Screen](image2)

4. The main CSPO screen displays the labor lines for the selected repair order.

   Use the arrow keys to navigate the list, and then press Enter to select the repair order you want to split.

   Choose a Repair Order and press (Enter)

   1:Help  2:Cancel/Close  9:Search
Moving a Closed Labor Line with CSPO

Figure 14. Split Repair Order Screen (example data)

Use the Up and Down arrow keys to navigate, or use the F9=Search command key to find specific text strings in the table of labor lines.

To flag a completed labor line that you want to move, press **Enter**.

**Note.** You cannot split out all the lines in a repair order.

5. From the main CSPO screen, press **F5=Move** to move any selected line(s).
6. At the **Move Selected Lines** prompt, enter **Y**.

The program creates a new repair order using the original RO number and the suffix defined in the CSPS routine, and then returns you to the RO field.

**Note.** By design, the Split Repair Order program cannot split an RO if the resulting new RO number would be more than 8 characters. If the RO number you are trying to split is already 8 characters in length, the program displays an error message indicating that the new RO cannot be created.

*In addition please note that a repair order cannot be split more than one time.*
CSPO Line Detail Command

If you want to see more detail on a specific labor line (including the op code and a longer description), move to that row and press **F2=Line Detail**.

The detail on a selected labor line includes the labor op code and any related part numbers.

You can also use the **F9=Search** command key here to search within the detail window as needed. Press **F3** to close the detail window.

CSPO Limitations and Restrictions

**Splitting a Repair Order More Than Once**

The ability to split an RO more than one time is no longer available in CSPO.

**Splitting a Repair Order with Discounts**

An RO cannot be split when a discount has been applied to one or more lines.
Opening the Original Repair Order

After splitting a repair order, use the following procedure to open the original RO.

1. Log on to your Service (name-S) application account.
2. At the Function Code field, enter CSPO.
3. At the RO field, enter the original repair order number.

Note. If your system had previously run a version of Split Repair Order that supported prefixes, and you generated new ROs that used the prefix option, the program displays an error message indicating that the old RO data may require conversion to the suffix-based format. Contact CDK Car!nk if this is the case.

4. The program displays a message to remind you that the RO has already been split. Press F3 to continue.

5. The original repair order appears in the CSPO window.

<table>
<thead>
<tr>
<th>DEMO: SPO</th>
<th>Split Repair Order</th>
<th>csr 6018</th>
</tr>
</thead>
<tbody>
<tr>
<td>AO: 500089</td>
<td>RO Status:</td>
<td>Open Date: 06/10/2003 Open Time: 12:35</td>
</tr>
<tr>
<td>Customer: 90025</td>
<td>SMITH,J</td>
<td>Pat: CASH</td>
</tr>
<tr>
<td>Vehicle: T658664, 96 GMC</td>
<td>STA: 626</td>
<td>VIN: T658664</td>
</tr>
<tr>
<td>Promised: 06/10/2003 05:00 War Exp Date: 05/00</td>
<td>St: O</td>
<td>Act: IMPD</td>
</tr>
<tr>
<td>Remarks:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LC Description:</td>
<td>Sta: TECH-LTYP</td>
<td>Est: S</td>
</tr>
</tbody>
</table>

A. SYSTEM LEAKING

B. Moved to: 500089 Line: A

C. Water Pump - Replace / Add

Figure 16. Split Repair Order Screen (showing moved lines)

To see a list of the labor lines moved to the new RO, press F6=View Splits.

<table>
<thead>
<tr>
<th>DEMO: SPO</th>
<th>Split Repair Order</th>
<th>csr 6007</th>
</tr>
</thead>
<tbody>
<tr>
<td>AO: 500038</td>
<td>RO Status:</td>
<td>Open Date: 07/29/2004 Open Time: 15:00</td>
</tr>
<tr>
<td>Customer: 203456789</td>
<td>JONES, JIM</td>
<td>Pat: CASH</td>
</tr>
<tr>
<td>Vehicle: W65712457, 98 MAZDA</td>
<td>STA: 626</td>
<td>VIN: W65712457</td>
</tr>
<tr>
<td>Promised: 07/30/2004 05:00 War Exp Date:</td>
<td>St: O</td>
<td>Act: IMPD</td>
</tr>
<tr>
<td>Remarks:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LC Description:</td>
<td>Sta: TECH-LTYP</td>
<td>Est: 100.00</td>
</tr>
</tbody>
</table>

500038A A Moved to: 500038A Line: A

500038A C Moved to: 500038A Line: B

Figure 17. View Splits Window

The Svc Description field in the table of split labor lines indicates the RO number and line to which the old labor line was moved. (The LC column indicates the original letter code for the moved labor line.)

To search within the View Splits window, use the F9=Search command key. Press F3 to return to the main CSPO window.
To use the Line Detail command on a labor line in the original repair order, see *CSPO Line Detail Command* on page 14.

6. Use the F3=Exit command key to return to the RO field, and again to return to the Function Code prompt.

Use function Post Final Charges (PFC) or Cashiering (CAS) to close the original repair order.
Opening the New Repair Order

After splitting a repair order, use the following procedures to open and review the new RO:

1. Log on to your Service (name-S) application account.
2. At the Function Code field, enter CSPO.
3. At the RO field, enter the repair order number for the new RO, including the suffix. For example, enter 229695C.

All labor lines moved from the original repair order appear in the new RO. Note that the letters used in the LC column are reordered, starting at A.

All posting data related to the labor line (parts information and dollar amounts, technician data, and sublet/miscellaneous fees) is also moved in a split.

To use the Line Detail command on a labor line in a new repair order, see CSPO Line Detail Command on page 14.

4. Use the F3=Exit command key to return to the RO field, and again to return to the Function Code prompt.

Use function Post Final Charges (PFC) or Cashiering (CAS) to close the new repair order.