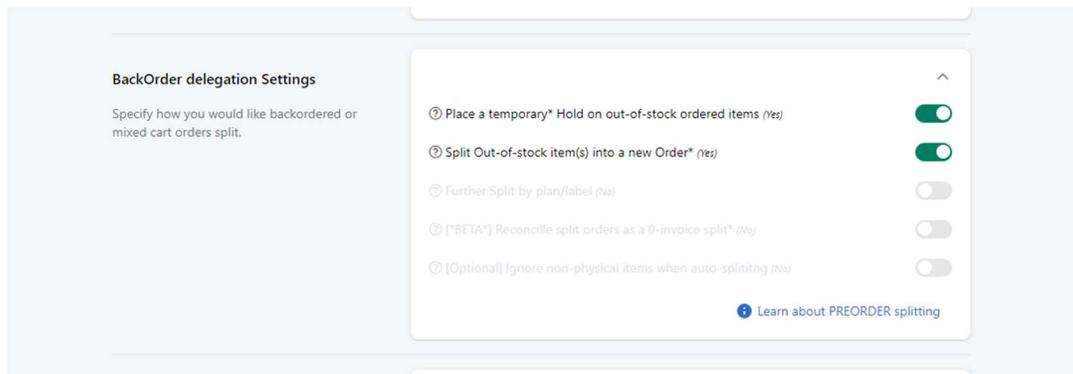




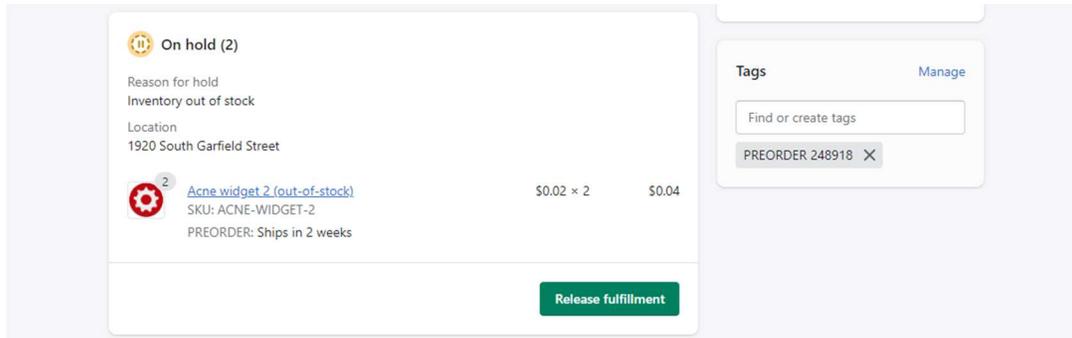
SplitOrder – Split/Hold order delegations

- To Auto-Hold or Split out-of-stock items from in-stock items

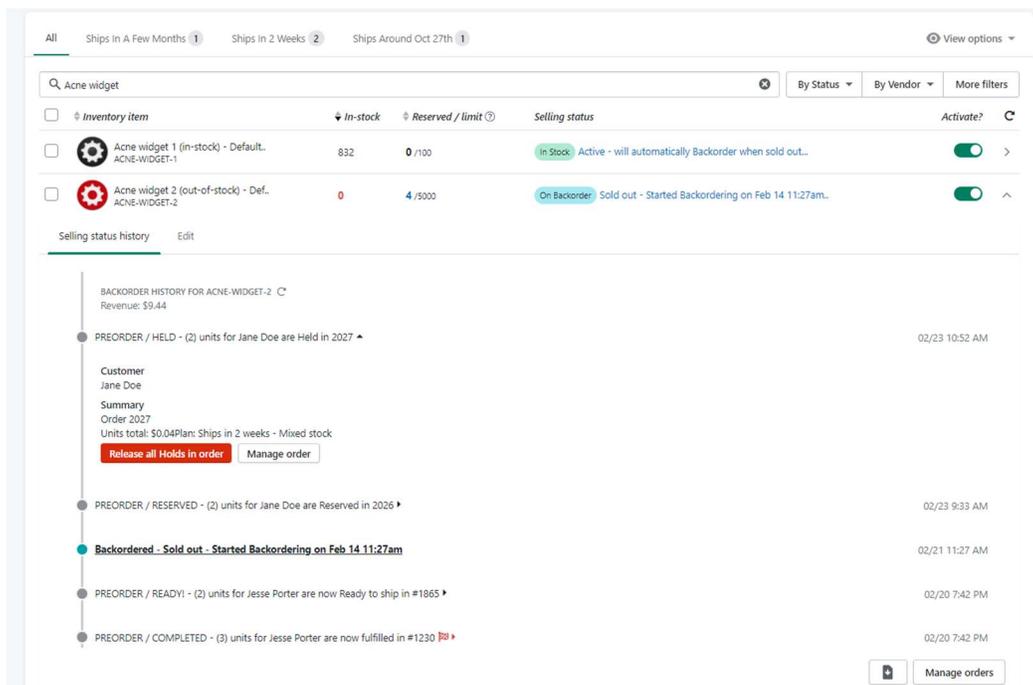


- In your App Backorder delegation settings, either toggle on “Place a temporary Hold on ..”, And/or “Split .. into a new order”, and we will automatically Hold and/or Split out-of-stock units into a new fulfillment/order.
 - ***NOTE:** Any setting updated will only apply to orders placed after the current time you Save. Stock status is assessed when Split (a few seconds to a few minutes after creation)
- **To Split out-of-stock items into a new Order**, select the “Split out-of-stock items into a new Order” option and continue reading.
 - ***NOTE:** *We cannot split subscription items, orders assigned to local delivery, or orders created from other Apps. – And, If you are working with a 3rd party, Test first – do not assume they can handle order edits.*
- **To Split a new Order with \$0 invoicing**, select the “Reconcile split orders as a 0-invoice split” option in the advanced section and continue reading.
- **Or, to just Hold the out-of-stock items**, Only use the first toggle on – this is the default.

- Lifecycle of a temporary hold



- Orders placed for [activated] item quantities that are out-of-stock will be Held.
- Once the item is restocked, we will automatically release the Hold, and move the status to “Ready to ship” when:
 - There is enough inventory restocked to fulfill – based on [F]irst[O]rdered[F]irst[O]ut allocation of all reserved ordered items beforehand
 - All other items in the Held fulfillment are also ready



- All status updates on backordered/reserved orders per item are chronologically displayed in the detail dropdown, as well as exportable.
- ***NOTE:** if you need to Pre-release or override a Hold for any reason, you may do so per order in the selling status history.

- How [new Order] splitting works:

Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method	Tags
#2008	Today at 8:38 pm	Jesse James	\$0.02	Paid	Unfulfilled	1 item		Split test
#2008-SPLIT	Today at 8:38 pm	Jesse James	\$0.04	Paid	On hold	2 items		Split new test

- Out-of-stock items will be held in a new order, with a suffix that you specify in your App general settings (ie: “#1234-SPLIT”). ***NOTE: The totals are pro-rated from the split, however, any shipping income (and total weight calculated) will only be on the original.**

- The split items units will be “removed” from the original order, which will show as a return/refund in your reports, with a “balance – you owe customer” title.
 - ***NOTE:** this balance equals the amount of the new split-off order(s). and cannot be removed. And any capturing or refunding can **only** be done on the original order. If this is of issue, consider the 0-invoice split option.
 - ***NOTE:** If you authorize and capture later, the split-off orders will be marked as paid – as most processors only let you capture 1 time.
 - ***NOTE:** You cannot further edit split orders – they are children of the original, please make sure all billing is done on the original.

- How [new Order] splitting with a 0-invoice works:

Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method	Tags
#2011	Today at 9:10 pm	Jesse James	\$5.39	Paid	Partially fulfilled	2 items	Economy	Split test
#2011-SPLIT	Today at 9:10 pm	Jesse James	\$0.00	Paid	On hold	2 items	Economy	Split new test

Paid		
Discount	SplitOrder - paid via #2011	-\$0.04
Subtotal	2 items	\$0.00
Shipping	Economy (4.0 lb)	\$0.00
Total		\$0.00
Paid by customer		\$0.00

- This option will create a 100% discount for each new Order created. ***NOTE: this means that any itemized discounting for the new Order(s) will be overwritten.**

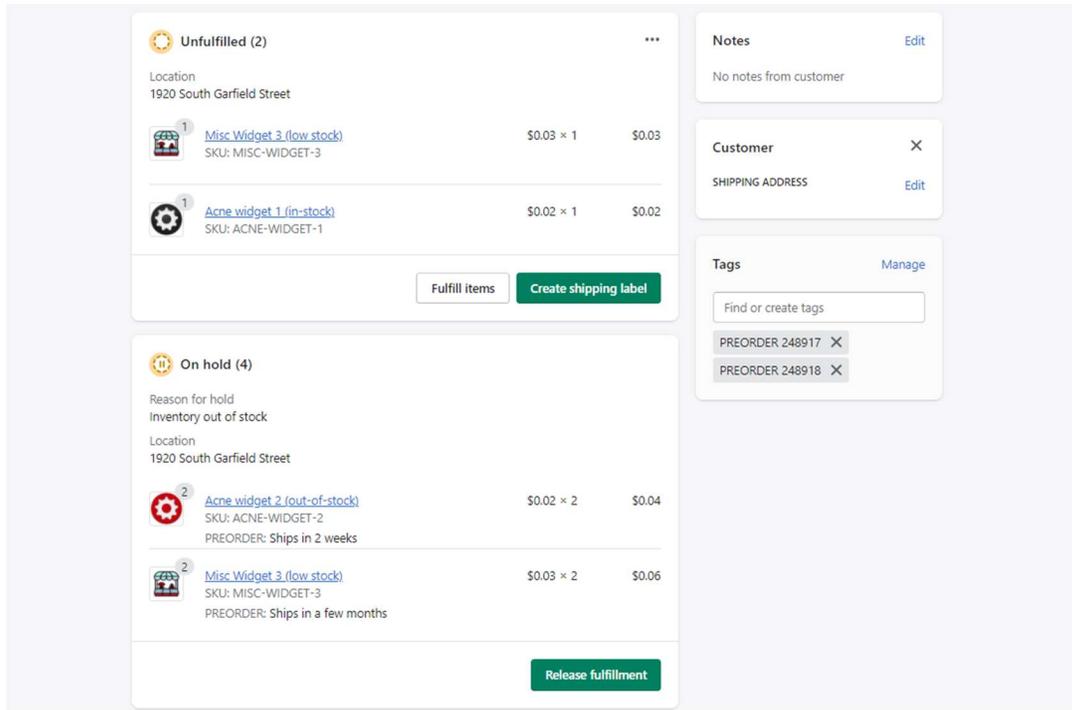
Fulfilled (1) #2011-F1		
Location 1920 South Garfield Street		
1	SPLIT UPDATE: (ACNE-WIDGET-2 x 2) has been moved to #2011-SPLIT	\$0.04 × 1 = \$0.04
Shipping not required.		
Add tracking		

Removed (2)		
2	Acne_widget 2 (out-of-stock) SKU: ACNE-WIDGET-2	\$0.02 × 2 = \$0.04

Paid		
Original order • February 22, 2022		\$5.39
Subtotal	2 items	\$0.06
Shipping	Economy (5.0 lb)	\$4.90
Tax	Show tax rates	\$0.43
Total		\$5.39
Paid by customer		\$5.39

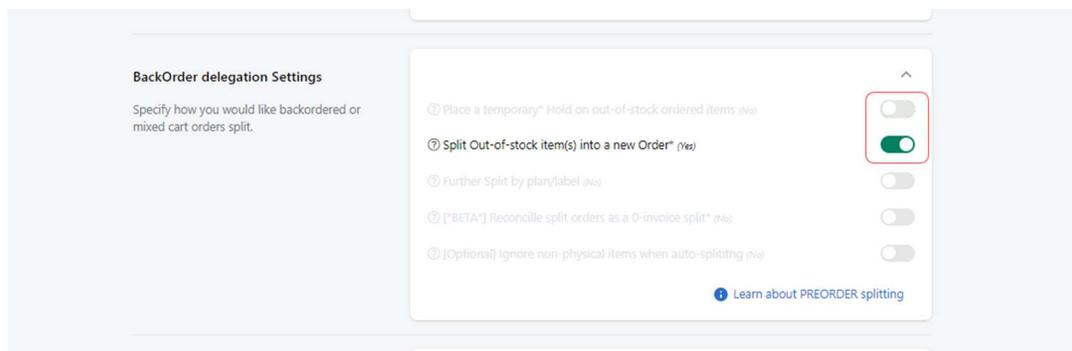
- The original order will then have a non-shippable, fulfilled reconciliation line-item* to account for each newly split Order's pro-rated totals. ***NOTE: this is required to keep the original total the same after the removals. Also, for complex tax & discounting cases, there might be a small remainder or other oddity. As such, please test and check with accounting and fulfillment for compatibility before you select this option.**

- How [the default] Holding out-of-stock items in the original order works:



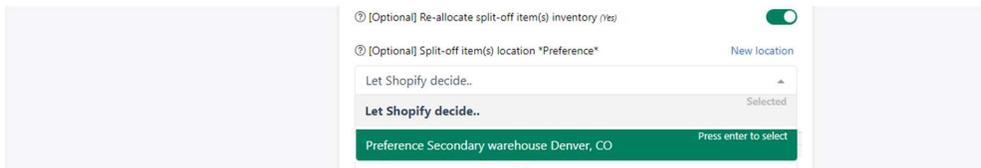
- If you have the Hold toggle on, we will Hold a separate fulfillment request for any out-of-stock units in your Shopify order editor. ***NOTE:** if your fulfillment or other App does not recognize FulfillmentOrder holds, or partially held items, then try splitting into a new Order instead.

- Advanced options & additional notes
 - To not Hold items if split into a new Order



- [Optional], if you want items that are split into a [new Order] to not be held, then toggle off the first and keep the second on. (This is helpful for working with 3rd parties like ShipStation & Netsuite)

- Further Split by plan/label (for [new order] splits)
 - In your delegation settings, toggle on this option and we will further separate out-of-stock items based on the matching plan/label. (good if you have different etas for specific vendors)
- Skip non-shippable items (for [new order] splits)
 - At times, other Apps and backends add non-physical items to your cart that do not need to be Held. (ie: Route package insurance). So, to avoid unnecessary Holds or Splits, then choose the “skip..” option in your advanced settings.
- Reallocate inventory (to a preferred location)



- By default, this App does not reassign inventory when splitting, as complications can arise. However, you can opt-into this here.
- Then, if you specify a preferred location (ie: Backorder warehouse), And ***if** all items aren't managed by a 3rd party/fulfillment service, we will reallocate any split-off items to be fulfilled from that location!

Date ▲	Order	Product	Gross sales	Discounts	Returns	Net sales	Taxes	Shipping	Total sales
Summary			\$4.00	\$0.00	\$0.00	\$4.00	\$0.36	\$0.00	\$4.36
Mar 14, 2022	#2088	Acne widget 1 (in-stock)	\$2.00	\$0.00	\$0.00	\$2.00	\$0.18	\$0.00	\$2.18
Mar 14, 2022	#2088	Acne widget 2 (out-of-stock)	\$2.00	\$0.00	\$0.00	\$2.00	\$0.18	\$0.00	\$2.18
Summary (After split)			\$6.00	\$0.00	-\$2.00	\$4.00	\$0.36	\$0.00	\$4.36
Mar 14, 2022	#2088	Acne widget 2 (out-of-stock)	\$2.00	\$0.00	\$0.00	\$2.00	\$0.18	\$0.00	\$2.18
Mar 14, 2022	#2088	Acne widget 1 (in-stock)	\$2.00	\$0.00	\$0.00	\$2.00	\$0.18	\$0.00	\$2.18
Mar 14, 2022	#2088-SPLIT	Acne widget 2 (out-of-stock)	\$2.00	\$0.00	\$0.00	\$2.00	\$0.18	\$0.00	\$2.18
Mar 14, 2022	#2088	Acne widget 2 (out-of-stock)	\$0.00	\$0.00	-\$2.00	-\$2.00	-\$0.18	\$0.00	-\$2.18

- ***Analytics reporting NOTE:** If you are splitting items into new Orders, the original order will have “removed” the split-off items – which will reconcile as a “return”, as those split items were added to the gross sales in your reporting.
- Further questions?
 - If there is a task or function not aligned to your case, please do not hesitate to email our support team. – service@mercantileapps.com