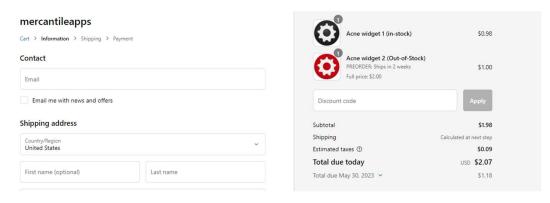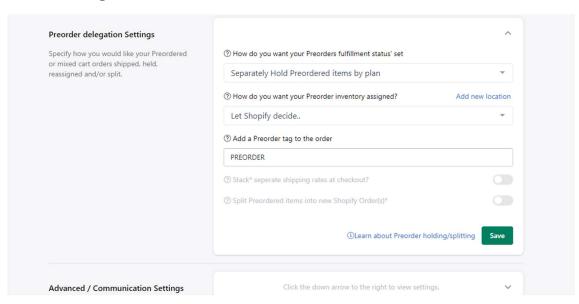# Mercantile Preorder

Advanced options & delegations

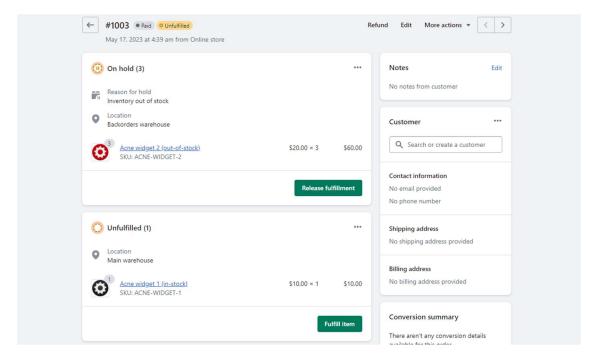## Preorder Deferred payments

- Pay now, fulfill later
  - Input 100 for the "Prepay percent at checkout" input when you activate items.

- Pay [partially or fully] when fulfilled
  - Input 0 for the "Prepay percent at checkout" input, or a percentage of the items price to be charged as a deposit at checkout.
  - Input a presented due date for checkout.
  - **NOTE:** *Shopify currently requires this, though we will automatically charge the remainder upon final fulfillment, or the due date – whichever comes later.*
  - **NOTE:** Deferred payments are Only available if you have Shopify Payments and PayPal Express as an active payment method.
  - **NOTE:** *If you have multiple due dates, the first will be used, however, we will charge any remainder when the entire order is finally fulfilled.*
  - **NOTE*: We cannot split Preorders with deferred payments into a new Shopify order.***

Preorder delegations

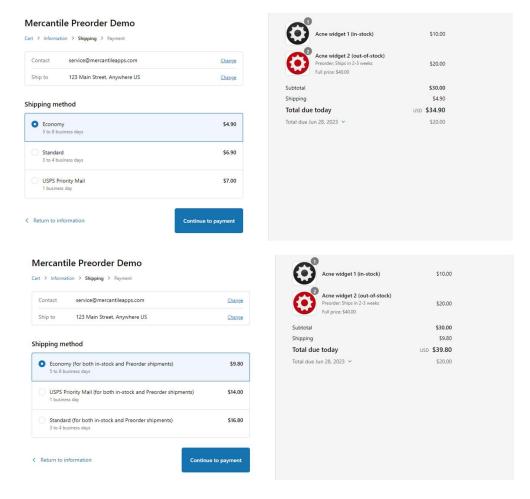- ## How do you want your Preorders fulfillment status' set
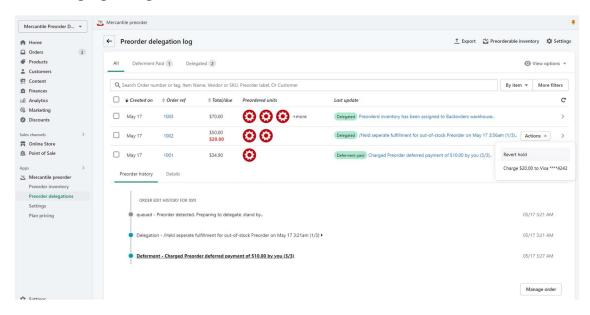

- You may either separately hold all Preordered items you activate (by shipping eta label) or hold all items if there is a Preordered item present.
- Any hold will be automatically released once all items are restocked on a FIFO basis. However, you can revert (release) the hold per Preorder at any time in the order delegation's log.

- How do you want your Preorder inventory assigned
  - You may specify a specific Shopify location (i.e. Backorders warehouse) to which we will assign any preordered quantities to.
  - **NOTE:** *we cannot reassign to a 3rd party or fulfillment service location.*
  - **NOTE***: you must restock to this location to release any holds*

- Stack separate shipping rates at checkout

- If a cart is mixed, we will automatically configure your checkout to stack the rates for both in-stock and preordered items.
- **NOTE:** *Currently, you can only stack the rates from your general shipping profile; no special rates, toggles or views can be added to your checkout.*
- **NOTE:** *Rates will only stack if the cart is mixed and the Preordered item(s) are fully out-of-stock vs ordered as insufficient quantity.*
- **NOTE:** *While weight conditions are calculated per shipment, price conditions (ie: free shipping over XX) are always per order.*

- Managing delegations

- All Preorder activity and actions are in the Preorder delegation's log. You may revert an action (such as a hold or split), force payment of a deferred amount, etc. from the Actions dropdown

- Or, remove or refund Preordered items via bulk-edit.
- NOTE: *If there is an issue with an action or deferred payment, the order will appear in the Exceptions tab. You may also opt-into nightly emails for exceptions.*

- Split directly in your ShipStation account:

- When prompted to select a backend service in your settings, pair with your ShipStation account that your Shopify store is connected to. We will then split your ShipStation Shipment Orders directly!
- **NOTE:** *The split occurs a few seconds to a few minutes after ShipStation pulls the order – and could be further delayed. please make sure to reload the grid!*
- **NOTE:** *Once we split the order, our App will relay the shipping info in place of ShipStation – this may display a false error in your batch shipping screen. Also, do not further split or manually ship a split order.*
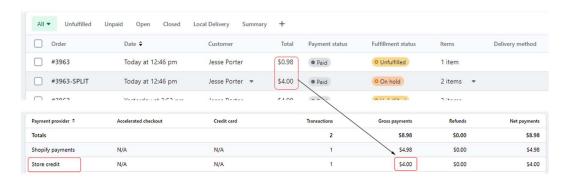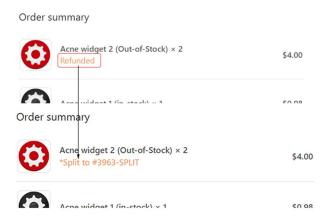
- Or, Split by new Shopify order*:

- Matching items will be added to a new [child] order, with a suffix that you specify in your App general settings (ie: "#1234-SPLIT").
- The split items units will be "removed" from the original order, resulting in a new total.

- If originally paid at checkout paid, the child order will also be marked as paid via Store Credit. This matches the difference of the original [parent] order's payment transaction vs what is left.

- ***Important nuances on splitting by a new Shopify order:**

- **Accounting - Duplicated gross payments:** Shopify will report against the original transaction as well as the split-off order(s) in aggregate. As such, we post all [paid] split-off orders to Store-Credit, which is the difference between what the customer originally paid and what was split-off. You must reconcile this. However, if you cannot, you can opt-out of posting the split-off order(s) to store credit in your Apps Settings > advanced section.

- **Display - "Refunded" notifications:** Shopify will sometimes refer to the removal of the item(s) on the parent order as "Refunded" in confirmation or email templates. To work around this, modify the liquid code to conditionally show it was split vs refunded based on the Order metafield we add to the original order after split, ie:

Ex 1: In your Shopify admin > settings > notifications > confirmation template, replace:

```
{% if line.refunded_quantity > 0 %}
   <span class="order-list__item-refunded">Refunded</span>
{% endif %}
```

With:

```
{%- assign splititem =  order.metafields.mas.splititems | where: 'id',line.id | first -%}
{%- if splititem.quantity > 0 -%}
   <span class="order-list__item-refunded">*Split to {{ splititem.split_to }}</span>
{% elsif line.refunded_quantity > 0 %}
   <span class="order-list__item-refunded">Refunded</span>
{% endif %}
```

Ex 2: In your Shopify admin > online store > [theme code] > snippets > main-order.liquid, replace:

```
<td headers="Row{{ line_item.key }} ColumnQuantity" role="cell" data-label="{{ 'customer.order.quantity' | t }}">
   {{  line_item.quantity }}</s>
</td>
```

With:

```
<td headers="Row{{ line_item.key }} ColumnQuantity" role="cell" data-label="{{ 'customer.order.quantity' | t }}">
{%- assign splititem =  order.metafields.mas.splititems.value | where: 'id',line_item.id | first -%}
{%- if splititem.quantity > 0 -%}
   <s>{{  line_item.quantity }}</s> {{ line_item.quantity | minus: splititem.quantity }}<br>
   <div class="properties"><i>*Split to {{ splititem.split_to }}</i></div>
{% else -%}
   {{  line_item.quantity }}
{%- endif -%}
</td>
```

Returns   Print   Export

Date ⬍	Order	Product	Gross returns	Discount returned	Net returns	Taxes returned	Shipping returned	Total returns
Totals			$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Jun 04, 2023	#3963	Acne widget 2 (Out-of-Stock)	-$4.00	$0.00	-$4.00	$0.00	$0.00	-$4.00
Jun 04, 2023	#3963	N/A	$4.00	$0.00	$4.00	$0.00	$0.00	$4.00

Net sales with cost   Print   Export

Date ⬍	Order	Product	Variant	Cost	Net sales
Totals				$0.03	$4.98
Jun 04, 2023	#3963	Acne widget 2 (Out-of-Stock)	N/A	$0.02	$4.00
Jun 04, 2023	#3963-SPLIT	Acne widget 2 (Out-of-Stock)	N/A	$0.02	$4.00
Jun 04, 2023	#3963	Acne widget 1 (in-stock)	N/A	$0.01	$0.98
Jun 04, 2023	#3963	Acne widget 2 (Out-of-Stock)	N/A	-$0.02	-$4.00

- **Reporting – "Returned" nuance:** Shopify will, at times, report the items split-off as "Returned". Please note this is reconciled by their additions to the newly split-off orders. However, you may need to further reconcile certain reports accordingly.

- **Shipping and weight are not split:** Unfortunately, any shipping income, and total weight calculated, _cannot be split_ and remain on the original due to Shopify limitations.

- **Incompatible 3rd parties:** Unfortunately, not all 3pl's, erp's, oms's or other Apps or backend services are up to date with Shopify order edits. Review the following workarounds to common issues with your 3rd party if needed:
    - If they do not update their order record post-split, then you could try to turn on the "5-minute delay" option in the Apps settings > advanced section or have them pull on delay or in a batch.
    - If they do not account for removed items on the original [parent] order, ask them to read the "currentQuantity" vs "quantity" lineItem property in the graphql API.
    - Switch to ShipStation – we split orders directly with them.

- **SplitOrder edit / reversion locking:** Shopify will lock the following types of orders from being reverted or cancelled after a split. And in rare cases will cancel a split we retry if failed on the first try. Always check the exceptions tab for details
    - Orders with a different presentment currency then the shop
    - Orders assigned to local delivery.
    - Orders from other 3rd party Apps or marketplaces.
    - Orders on a deferred payment plan **NOTE:** _also, check with any subscription/preorder app you use before splitting their items to ensure any selling plan data isn't unlinked.)_