

# Mercantile Preorder

## Advanced options & delegations

### Preorder Deferred payments

The screenshot displays the mercantileapps checkout interface. On the left, the 'Contact' section includes an email input field and a checkbox for 'Email me with news and offers'. Below this is the 'Shipping address' section with a dropdown for 'Country/Region' (set to 'United States') and input fields for 'First name (optional)' and 'Last name'. On the right, the cart summary shows two items: 'Acne widget 1 (in-stock)' for \$0.98 and 'Acne widget 2 (Out-of-Stock)' for \$1.00, with a note 'PREORDER: Ships in 2 weeks' and 'Full price: \$2.00'. A 'Discount code' input field with an 'Apply' button is present. The subtotal is \$1.98, shipping is 'Calculated at next step', and estimated taxes are \$0.09. The 'Total due today' is USD \$2.07, and the 'Total due May 30, 2023' is \$1.18.

- 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

**Preorder delegation Settings**

Specify how you would like your Preordered or mixed cart orders shipped, held, reassigned and/or split.

① How do you want your Preorders fulfillment status' set

Separately Hold Preordered items by plan

② How do you want your Preorder inventory assigned?

Let Shopify decide..

③ Add a Preorder tag to the order

PREORDER

④ Stack\* separate shipping rates at checkout?

⑤ Split Preordered items into new Shopify Order(s)\*

[① Learn about Preorder holding/splitting](#) **Save**

Advanced / Communication Settings

Click the down arrow to the right to view settings.

- How do you want your Preorders fulfillment status' set

← #1003 ● Paid ● Unfulfilled

Refund Edit More actions

May 17, 2023 at 4:39 am from Online store

On hold (3)

Reason for hold  
Inventory out of stock

Location  
Backorders warehouse

3

Acne widget 2 (out-of-stock)

SKU: ACNE-WIDGET-2

\$20.00 × 3

\$60.00

Release fulfillment

Unfulfilled (1)

Location  
Main warehouse

1

Acne widget 1 (in-stock)

SKU: ACNE-WIDGET-1

\$10.00 × 1

\$10.00

Fulfill item

Notes

No notes from customer

Customer

Search or create a customer

Contact information

No email provided  
No phone number

Shipping address

No shipping address provided

Billing address

No billing address provided

Conversion summary

There aren't any conversion details available for this order.

- 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 3<sup>rd</sup> party or fulfillment service location.*
  - **NOTE:** *you must restock to this location to release any holds*
- Stack separate shipping rates at checkout

#### Mercantile Preorder Demo

Cart > Information > Shipping > Payment



Contact	service@mercantileapps.com	<a href="#">Change</a>
Ship to	123 Main Street, Anywhere US	<a href="#">Change</a>

#### Shipping method

<input checked="" type="radio"/> Economy 5 to 8 business days	\$4.90
<input type="radio"/> Standard 3 to 4 business days	\$6.90
<input type="radio"/> USPS Priority Mail 1 business day	\$7.00

[Return to information](#)

[Continue to payment](#)

 1 Acne widget 1 (in-stock)	\$10.00
 2 Acne widget 2 (out-of-stock) Preorder: Ships in 2-3 weeks Full price: \$40.00	\$20.00
Subtotal	\$30.00
Shipping	\$4.90
<b>Total due today</b>	USD <b>\$34.90</b>
Total due Jun 28, 2023	\$20.00

#### Mercantile Preorder Demo

Cart > Information > Shipping > Payment



Contact	service@mercantileapps.com	<a href="#">Change</a>
Ship to	123 Main Street, Anywhere US	<a href="#">Change</a>

#### Shipping method

<input checked="" type="radio"/> Economy (for both in-stock and Preorder shipments) 5 to 8 business days	\$9.80
<input type="radio"/> USPS Priority Mail (for both in-stock and Preorder shipments) 1 business day	\$14.00
<input type="radio"/> Standard (for both in-stock and Preorder shipments) 3 to 4 business days	\$16.80

[Return to information](#)

[Continue to payment](#)

 1 Acne widget 1 (in-stock)	\$10.00
 2 Acne widget 2 (out-of-stock) Preorder: Ships in 2-3 weeks Full price: \$40.00	\$20.00
Subtotal	\$30.00
Shipping	\$9.80
<b>Total due today</b>	USD <b>\$39.80</b>
Total due Jun 28, 2023	\$20.00

- 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.*

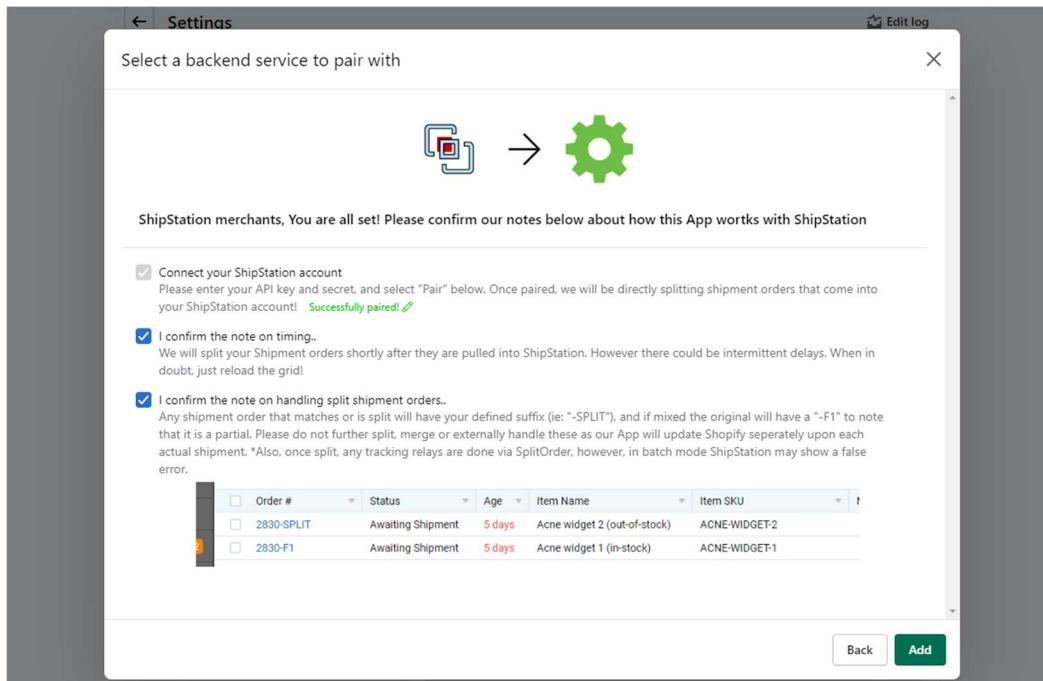
- Managing delegations

The screenshot displays the 'Preorder delegation log' interface. The left sidebar contains navigation links: Home, Orders (2), Products, Customers, Content, Finances, Analytics, Marketing, Discounts, Sales channels, Online Store, Point of Sale, Apps, Mercantile preorder, Preorder inventory, **Preorder delegations**, Settings, and Plan pricing. The main content area has a title 'Preorder delegation log' with 'Export', 'Preorderable inventory', and 'Settings' links. Below the title are tabs for 'All', 'Deferment Paid (1)', and 'Delegated (2)'. A search bar and filters are present. The table lists three delegations:

Created on	Order ref	Total/due	Preordered units	Last update
May 17	1003	\$70.00	3 units (with 3 red gear icons)	Delegated - Preorder inventory has been assigned to Backorders warehouse.
May 17	1002	\$50.00 <del>\$20.00</del>	2 units (with 2 red gear icons)	Delegated - Held separate fulfillment for out-of-stock Preorder on May 17 3:56am (1/3).
May 17	1001	\$34.90	1 unit (with 1 red gear icon)	Deferment paid - Charged Preorder deferred payment of \$10.00 by you (3/3).

An 'Actions' dropdown menu is open for the third delegation, showing options: 'Revert hold' and 'Charge \$20.00 to Visa \*\*\*\*4242'. Below the table is a 'Preorder history' section with a timeline for 'ORDER EDIT HISTORY FOR 1001' showing events like 'queued - Preorder detected', 'Delegation - Held separate fulfillment', and 'Deferment - Charged Preorder deferred payment'.

- 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\*:

All	Unfulfilled	Unpaid	Open	Closed	Local Delivery	+		
Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method	Tags
<input type="checkbox"/> #3894	Today at 7:57 pm	Jesse Porter	\$1.07	<span>Paid</span>	<span>Unfulfilled</span>	1 item		<span>Split</span>
<input type="checkbox"/> #3894-SPLIT	Today at 7:57 pm	Jesse Porter	\$4.35	<span>Paid</span>	<span>Unfulfilled</span>	2 items		<span>Split new</span>

←

#3894

● Paid

● Unfulfilled

Refund

Edit

More actions ▾

<

>

May 22, 2023 at 7:57 pm from Online store

🔔

Unfulfilled (1)

...

📍

Location

Mid/West (Primary) warehouse

⚙️

1

Acne widget 1 (in-stock)

SKU: ACNE-WIDGET-1

\$0.98 × 1

\$0.98

Fulfill item

Create shipping label

⚙️

Removed (2)

⚙️

2

Acne widget 2 (Out-of-Stock)

SKU: ACNE-WIDGET-2

Restocked at Mid/West (Primary) warehouse

\$2.00 × 2

\$4.00

✅

Paid

Original order • May 22, 2023

\$5.42

Subtotal

1 item

\$0.98

Tax

Show tax rates

\$0.09

Total

\$1.07

Paid by customer

\$5.42

Notes

Edit

No notes from customer

Additional details

Edit

SplitOrder

Split (1) matching item, (2) units to #3894-SPLIT

Customer

×

Shipping address

Edit

Tags

Manage

Split ×

←

#3894-SPLIT

● Paid

● Unfulfilled

Refund

Edit

More actions ▾

<

>

May 22, 2023 at 7:57 pm from SplitOrder (via import)

🔔

Unfulfilled (2)

...

📍

Location

Mid/West (Primary) warehouse

⚙️

2

Acne widget 2 (Out-of-Stock)

SKU: ACNE-WIDGET-2

\$2.00 × 2

\$4.00

Fulfill items

Create shipping label

✅

Paid

Subtotal

2 items

\$4.00

Tax

Show tax rates

\$0.35

Total

\$4.35

Paid by customer

\$4.35

Notes

Edit

No notes from customer

Additional details

Edit

SplitOrder

Item(s) Split from #3894 on May 22 8:04pm

SplitOrderParent

#3894

Tags

Manage

Split new ×

- 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:**

All	Unfulfilled	Unpaid	Open	Closed	Local Delivery	Summary	+
<input type="checkbox"/> Order	Date	Customer	Total	Payment status	Fulfillment status	Items	Delivery method
<input type="checkbox"/> #3963	Today at 12:46 pm	Jesse Porter	\$0.98	Paid	Unfulfilled	1 item	
<input type="checkbox"/> #3963-SPLIT	Today at 12:46 pm	Jesse Porter	\$4.00	Paid	On hold	2 items	
Payment provider	Accelerated checkout	Credit card	Transactions	Gross payments	Refunds	Net payments	
Totals			2	\$8.98	\$0.00	\$8.98	
Shopify payments	N/A	N/A	1	\$4.98	\$0.00	\$4.98	
Store credit	N/A	N/A	1	\$4.00	\$0.00	\$4.00	

- **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.

#### Order summary

	Acne widget 2 (Out-of-Stock) × 2	\$4.00
	Refunded	
	Acne widget 1 (in-stock) × 1	\$0.98
Order summary		
	Acne widget 2 (Out-of-Stock) × 2	\$4.00
	*Split to #3963-SPLIT	
	Acne widget 1 (in-stock) × 1	\$0.98

- **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	<a href="#">#3963</a>	Acne widget 2 (Out-of-Stock)	-\$4.00	\$0.00	-\$4.00	\$0.00	\$0.00	-\$4.00	
Jun 04, 2023	<a href="#">#3963</a>	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	<a href="#">#3963</a>	Acne widget 2 (Out-of-Stock)	N/A	\$0.02	\$4.00		
Jun 04, 2023	<a href="#">#3963-SPLIT</a>	Acne widget 2 (Out-of-Stock)	N/A	\$0.02	\$4.00		
Jun 04, 2023	<a href="#">#3963</a>	Acne widget 1 (in-stock)	N/A	\$0.01	\$0.98		
Jun 04, 2023	<a href="#">#3963</a>	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 3<sup>rd</sup> 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 3<sup>rd</sup> 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 than the shop
  - Orders assigned to local delivery.
  - Orders from other 3<sup>rd</sup> 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.*