



SplitOrder

Order delegations guide

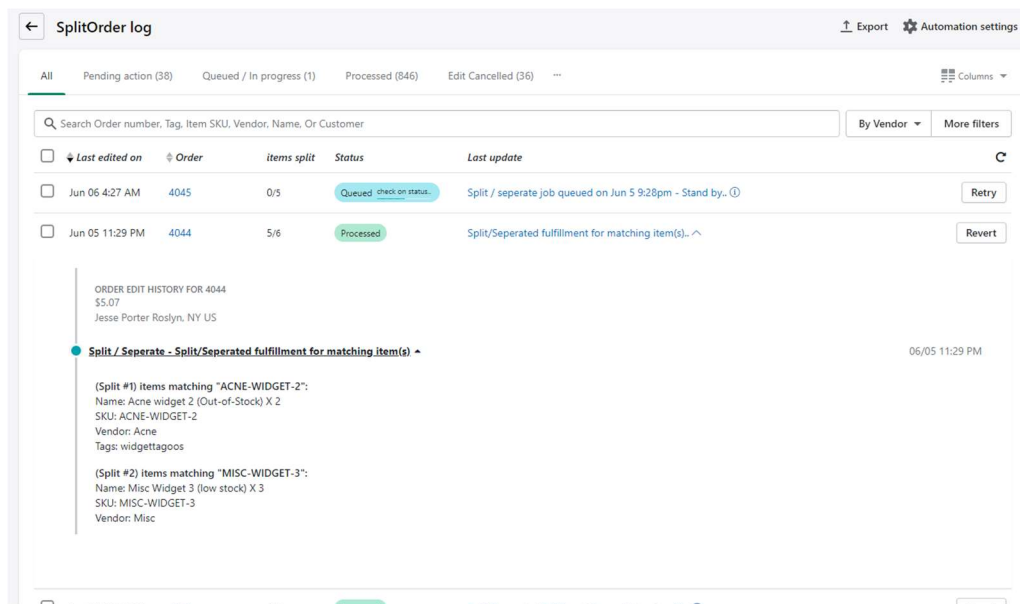
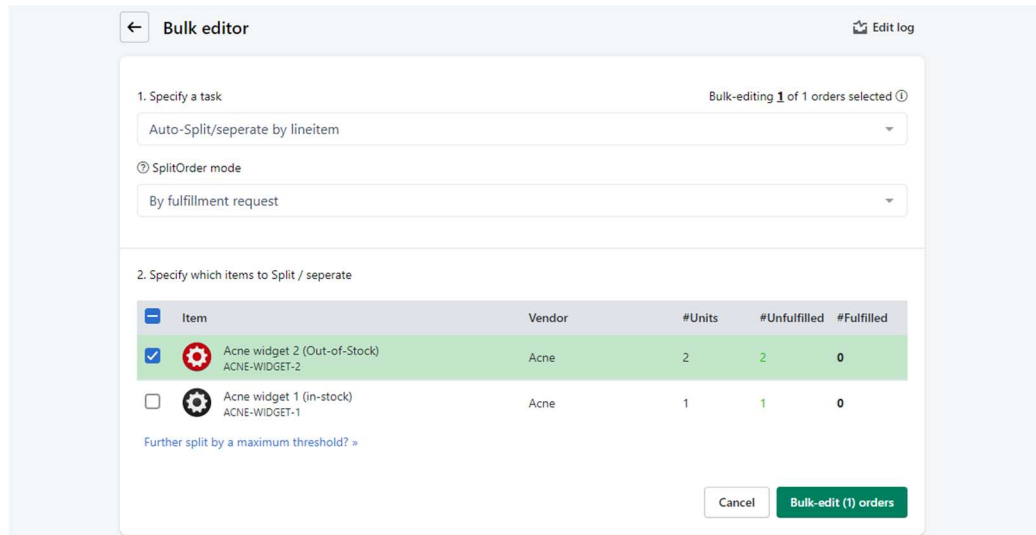
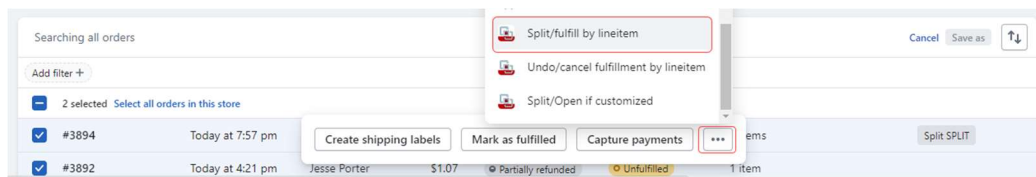
- To Automate

The screenshot shows the 'Settings' page for SplitOrder. At the top, there's a 'SplitOrder log' link. The main section is titled '1. Specify your SplitOrder mode' with a subtext: 'You can split items into separate Fulfillment requests, orders or directly in ShipStation.' Below this, there are two dropdown menus: 'How would you like your orders split?' (set to 'By fulfillment request') and 'Tag order where matching items are split*' (set to 'Split').

The second section is titled '2. Activate a SplitOrder automation task' with a subtext: 'Opt into any of the following tasks to split automatically. Changes affect future orders'. It features a toggle switch for 'Auto-Split by lineitem' which is turned on. Below this, there's a section for 'Specify groups of Vendor, SKU or Product Tag matches'. It shows two split groups: 'Split group #1' with 'Vendor: Acne' and 'SKU: MISC-WIDGET-3', and 'Split group #2 (clear)' with 'SKU: ACNE-WIDGET-4LG'. There's a link 'Further split by an item threshold? »' between the groups. At the bottom, there's a 'Max units/split' dropdown set to 'x 2' and a toggle switch 'Only if over (On)' which is also turned on. A '+' button is at the bottom right to add more groups.

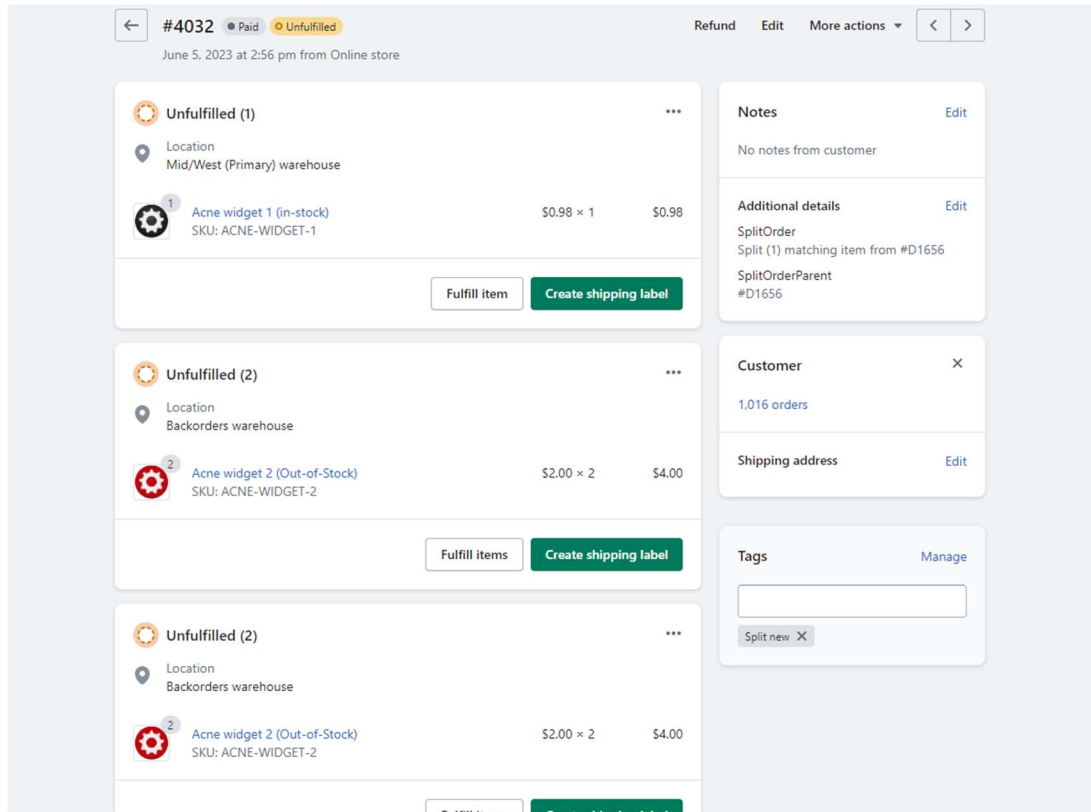
- In your App settings, select an automation task to activate.
- For the “Auto-Split by lineitem”, input a set of Vendor names, SKUs, or Product Tags, and we will automatically split all matching items (per Split group).
- If you need the group further split by maximum threshold of units, sku’s, weight or price, then click on “Further split by item threshold” and follow prompts.
- Or activate another automation task such as split by stock status or location preference.

- To Bulk-edit

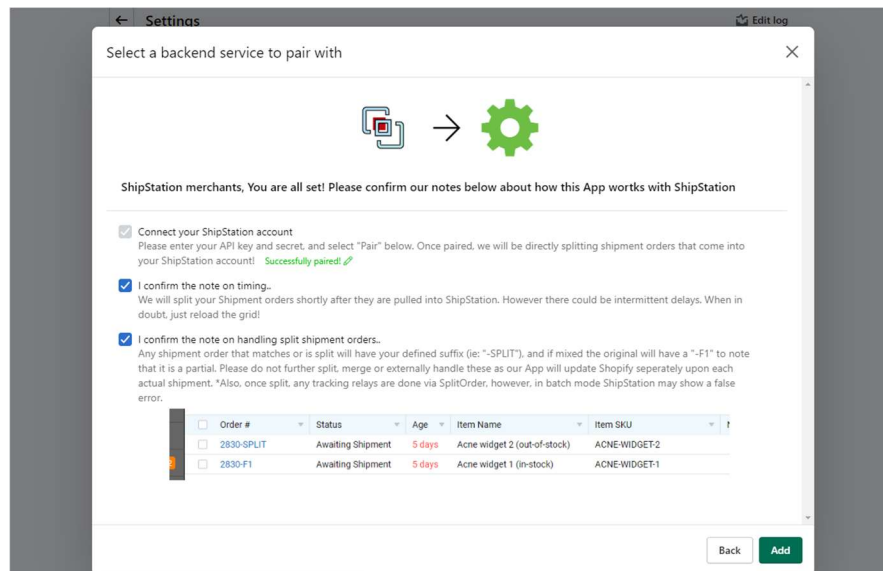


- Select the Orders, then the line-items and filters, and Press Bulk-edit button.
- Matching orders (based on your selection) will say “queued” and will process momentarily. When processed, each split will be detailed in the edit log.
- You can also revert or cancel a split* from the order edit log.

- Split By Fulfillment request:



- All matching items will be placed in a separate Fulfillment request of either the same assigned location or re-routed to a specific location you set*.
- Or, Split directly in your ShipStation account:



- Or, Split by new Shopify order*:

All

Unfulfilled

Unpaid

Open

Closed

Local Delivery

+

🔍

≡

⌵

<input type="checkbox"/>	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	Paid	Unfulfilled	1 item		Split
<input type="checkbox"/>	#3894-SPLIT	Today at 7:57 pm	Jesse Porter	\$4.35	Paid	Unfulfilled	2 items		Split new

←

#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

Acne widget 2 (Out-of-Stock) \$2.00 × 2 \$4.00
SKU: ACNE-WIDGET-2

Fulfill items Create shipping label

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 ×

Paid

Subtotal	2 items	\$4.00
Tax	Show tax rates	\$0.35
Total		\$4.35
Paid by customer		\$4.35




- 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	
<input type="checkbox"/> #3963	Yesterday at 3:02 pm	Jesse Porter	\$4.00	Paid	Unfulfilled	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	\$0.00
Order summary		
	Acne widget 2 (Out-of-Stock) × 2	\$4.00
	*Split to #3963-SPLIT	
	Acne widget 1 (in-stock) × 1	\$0.00

- **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.
- Customers are mistakenly emailed upon Split:** When we split, we explicitly tell Shopify not to email the customer (on order update of the original, and on confirmation of the newly split-off order(s)). As such, please instruct any 3rd party to not send emails when the “notify” or “send_receipt” property is set to false on the above actions respectively.
- 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 than 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.*

- Advanced options

2. Activate a SplitOrder automation task
Opt into any of the following tasks to split automatically. Changes affect future orders

🔍 Auto-Split by lineitem (Off)

Click on toggle above to activate and configure this task [Watch video](#)

🔍 Auto-Split/Hold out-of-stock items (On)

🔍 How would you like us to assign out-of-stock items? [Add new location](#)

Keep to assigned location

Keep to assigned location Selected

Assign to Mid/West (Primary) warehouse Denver, CO

Assign to East (Secondary) warehouse Denver, CO

Assign to Tertiary warehouse Grand Prairie, TX

Assign to Backorder warehouse

Press enter to select

- **Re-routing inventory:** When items are split, Inventory is uncommitted from the original order and allocated to the newly split-off fulfillment or order. By default, the original location assignment is kept; however, you can instead specify a specific location to reroute to (ie: Backorder warehouse).
 - **NOTE:** *If an item belongs to a 3pl fulfillment service that elected to not share skus, it is locked from being re-routed. Also, if they have requested or accepts a fulfillment, we cannot reroute it.*
 - **NOTE:** Splitting an overage (ie same SKU) and routing it to a separate location is behaving oddly at the moment.
- Skipping items and orders

3. Specify additional filters

Please specify any item or order conditions where you do, or do not want to automatically split orders. All options apply to any inputs per condition.

- ☒ SKIP non-physical items
- ☒ SKIP internationally shipped orders
- ☐ SKIP subscription or items with deferred purchase options*
- ☐ SKIP local/non-shipped orders
- SKIP by order tag
- ONLY split for specific channels or sources
- ONLY split for specific order tags

Advanced settings
Administrative configurations and other

Click the down arrow to the right to view settings.

- Specify Order conditions, tags and item types to skip in your Apps settings > Specify additional filters section.
 - All options you opt-into apply to any inputs per condition. For example, if you only want to split domestic orders for (3) order tags, all domestic orders with *any* of those tags will make the order valid for split.
 - If you have a specific item, you want skipped from being split (ie: Route insurance), add the tag “SO-IGNORE-AUTOSPLIT” to the product.
- Need to know when the split is done or skipped? If other Apps, Shopify flow, or your developer are awaiting our split to trigger an action, you can input an “Assessed” tag in your Apps advanced settings – which we will tag the order once were done assessing or splitting each order.
 - Managing exceptions

SplitOrder log Export Automation settings

All Queued / In progress (2) Processed (808) **Exception (47)** Columns

Search Order number, Tag, Item SKU, Vendor, Name, Or Customer By Vendor More filters

<input type="checkbox"/>	Last edited on	Order	items split	Status	Last update
<input type="checkbox"/>	May 27 2:48 PM	1746-SPLIT SplitSL +	0/4	Exception	We can only split orders created in the last 2 months - aborted... !
<input type="checkbox"/>	May 27 2:48 PM	1744-SPLIT SplitSL +	0/4	Exception	We could not process a split - Shopify has locked editing on this order. !
<input type="checkbox"/>	May 27 2:48 PM	1744	0/4	Exception	We can only split orders created in the last 2 months - aborted... !

- Review the Exceptions tab for any issues.
 - Opt-in to nightly email of the previous days exceptions in Settings > advanced section
- Further questions email service@mercantileapps.com