SplitOrder

Order delegations guide

- **To Automate**

  ![Settings](image)

  1. Specify your SplitOrder mode
     You can split items into separate fulfillment requests, orders, or directly in ShipStation.

     - How would you like your orders split?
     - By fulfillment request

     - Tag order where matching items are split
     - Split

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

     - **Auto-Split by lineitem**: (on)
     - Specify groups of Vendor, SKU or Product Tag matches
       Split group #1
       - **Vendor**: Acme
       - **SKU**: MIS-WIDGET-3
       - Further split by an item threshold?
         - Split group #2 (on)
         - **SKU**: ACNE-WIDGET-4L
         - X 2
         - Max units/split
         - Only if over 0

  - 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:
- 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:

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

With:

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

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

{%- 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>
```

With:

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

{%- assign splititem = order.metafields.mas.splititems.value | where: 'id',line_item.id | first -%}
{%- if splititem.quantity > 0 -%}
  <div class="properties"><i>*Split to {{ splititem.split_to }}</i></div>
{%- else -%}
  {{ line_item.quantity }}
{%- endif -%}
</td>
```
• **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 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.

• Advanced options

![Advanced options screenshot]

• 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
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

  - 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