Routing Strategies

Routing strategies are configurations of individual locations, scenarios, filters, and assignment logic that control your order routing.

Note that changes to Order Routing settings may not immediately take effect when processing orders. It may take up to 15 minutes for updates to be reflected in the system while the cache refreshes.

The Order Routing UI has been overhauled in August 2025 with an updated look and feel, as well as some functional changes. This new UI is now available to be enabled in your sandboxes. Contact to opt in and begin using it. All sandbox tenants will receive the new UI on September 3, unless you have specified to opt out by notifying Kibo Support. The UI will also be available for production tenants on September 3. Coordinate with Kibo to migrate your production tenants at any point between September and end of January 2026.

Expand the below sections to view the strategy details for the appropriate UI version.

Classic Order Routing UI

If you have not yet upgraded to the new Order Routing UI, then you are using the Classic UI. Here, each strategy contains a route for every fulfillment type you offer and only one strategy can be active at a time.

View and Manage Strategies

The landing page of the Order Routing UI is the **Routing Strategy** page, which lists all active and inactive strategies you have created. Only one strategy may be active (or "live") at a time. The active strategy determines which routing rules are applied to the production tenant and affect real orders. Any number of inactive strategies can be created so that tests can be done in a safe environment instead of in the active strategy.

The following actions can be performed on each strategy:

- Promote a new strategy to active status.
- Expand the options in the top right corner of each strategy to Edit or Duplicate it.
 Editing will allow you to change its name and description, but not set any configurations yet.
- Click **Archive** on any inactive strategies.

VIEWS	
Routing Strategy	Routing Strategy
ACTIONS Add Routing Strategy	Each routing strategy contains an order routing plan. Only one routing strategy can be active at a time, but you can create as many as you want. Schedule routing strategy in advance to prepare for flash sales and seasonal strategy.
	Active Strategy
	Live Routing Created on 04/12/2023
	Inactive Strategy
	Test Routing
	Created on 04/12/2023
	Promote to active
	Archive

Create a New Strategy

To add a new strategy to this page (without duplicating an existing strategy):

 Click Add Routing Strategy on the left-hand menu. This will add a blank card to the inactive strategies.



Name		
Example Strategy		
Description		
A new strategy for BOPIS.		

3. Click Save.

View Strategy Details

Click the name of a strategy to view more details and configure it. The example strategy below contains two fulfillment paths for Direct Ship and Transfer to Store. Each path includes the following settings:

- **Status**: Click the status toggle to activate or deactivate this path as needed. If disabled, orders will not be able to be routed with those scenarios and settings.
- **Sort Strategy**: Click the gear icon in the top right to select a new candidate sort strategy. This will prioritize routing candidates based on a minimal number of shipments, scenario rank and quantity, quantity, or distance from the shipping destination.
- Assignment Preference: Indicate whether single or multiple assignment is preferred.
- Scenarios: Scenarios are groups of locations that an order can be routed within. You can rank them here by clicking the arrow icon or the scenario name. For more details about adding and editing scenarios, see the Scenarios guide. You can also click Import
 Scenarios or Export Scenarios in the top right of the page to view or update a list of scenario locations via .CSV files.

Routing Strategy	Routing Strategy / Live Routing			
Locations				
T Filters			1 Import Scenarios	Let Export Scenarios
🎤 Custom data lists				
Custom data sets	Direct Ship	Add Scenario	Transfer to Location	Add Scenario
Suggestion Logs	View Scenarios Last updated on 06/06/2024 by admin@kibocomr	nerce.com	View Scenarios Last updated on 04/26/2023 by admin@kibocor	nmerce.com
流 Suggestion Debug	Candidate sort strategy: Minimize Shipments		Candidate sort strategy: Minimize Shipments	
	Active		C Active	
	 Multiple assignments preferred Single assignment preferred 		 Multiple assignments preferred Single assignment preferred 	
	Scenarios		Scenarios	
	Warehouses	Edit	Group 1	Edit
	Group 1	Edit	STH-C	Edit
	Group 2	Edit	Group 2	Edit
	STH-C	Edit	Group 3	Edit
			Warehouses	Edit

New Order Routing UI

In the new UI, each strategy represents one particular fulfillment type and only one strategy can be active per fulfillment type at a time.

View and Manage Strategies

The **List Strategies** page of Order Routing displays all strategies you have created for your site(s). Click the **Current Site** selector in the top right to switch to a different site and view its strategies instead.

Only one strategy per fulfillment type can be active at a time, which determines the routing rules applied to the production tenant and affects real orders. Any number of inactive strategies can be created so that tests can be done in a safe environment instead of in the active strategy. For example, you may have strategies for Direct Ship (active), Transfer (active), and Test Direct Ship (inactive).

Strategies A list of all strategies for the selected site APIAutom	ationOmsOnly			Current Site	APIAutomation0ms0nly -
Name	Description	Туре	Status	Assignment	Action
DIRECTSHIP	Direct Ship strategy	DIRECTSHIP	Active	Multiple	/ 1
TRANSFER	Transfer strategy	TRANSFER	Inactive	Multiple	/1
TEST_DIRECTSHIP	Direct Ship for testing	DIRECTSHIP	Inactive	Single	/1
TEST_TRANSFER	Transfer for testing	TRANSFER	Inactive	Multiple	/=
DELIVERY	Delivery strategy	DELIVERY	Inactive	Multiple	/=
TEST_DELIVERY	Delivery for testing	DIRECTSHIP	Inactive	Single	/1
DISPOSITION	Disposition strategy	DIRECTSHIP	Inactive	Single	/=
TRANSFER_2	Backup Transfer strategy	TRANSFER	Inactive	Multiple	/=
DISPOSITION_UPDATED	Updated Disposition strategy	DIRECTSHIP	Inactive	Single	/1
K K (1) 2 3 > >I					1 of 3 pages (29 items)

Create a New Strategy

To add a new strategy to Order Routing:

- 1. Go to the **List Strategies** page.
- 2. Click **Add Strategy** in the top right. This will open the basic strategy configuration form.

Add Strategy	
Create a new strategy by filling out the information below.	
Name *	
Fulfill Delivery by Distance	
Description	
Enter strategy description	
	<i>"</i>
Type *	
DELIVERY	-
Candidate Sort Strategy*	
DISTANCE	
Assignment Type	Multiple Accientment
Choose between single or multiple assignments	
Strategy Status	
Enable or disable this strategy	Active
	Cancel

- 3. Enter the **Name**. It is recommended to use strategy names that reflect the fulfillment type being used.
- 4. Enter an optional **Description**.
- 5. Select the strategy's fulfillment **Type**.
- Select a Candidate Sort Strategy. This will prioritize routing candidates based on a minimal number of shipments, scenario rank and quantity, quantity, or distance from the shipping destination.
- 7. Determine what **Assignment Type** you want to use. If you want to allow assignment across different scenarios, toggle on Multiple Assignment. If you want to keep all item assignments within a single scenario, leave Multiple Assignment toggled off.
- 8. Toggle the strategy to **Active** if you want this to be your active strategy for the selected fulfillment type. If another strategy of that type is already active, then an error message will be displayed. You must disable the currently-active strategy before creating a new active one.
- 9. Click Save.

Once a strategy has been created, further define its routing logic by clicking its Edit icon in

the table and configuring the scenarios (which includes the available fulfillment locations and filter conditions). Editing an existing strategy also allows you to change its status, assignment type, and other basic settings at any time.

Single vs. Multiple Assignment

If single assignment is preferred, then all of the items in a shipment will be assigned to a single scenario that can fulfill the entire order (though it may be split between different locations within that scenario). But if multiple assignment is preferred, then the items can be assigned between locations across different scenarios.

Single assignment is the default option and may be preferred in cases such as when Scenario 1 consists of warehouses and Scenario 2 is retail stores, and orders should only be fulfilled by one type of fulfillment location or the other.

For more details about how assignment logic is configured within a scenario, see the Scenario guide.