


Routing Strategies

Routing strategies are configurations of individual locations, scenarios, filters, and assignment logic that control your order routing. The **Routing Strategy** page lists all strategies you have created, both active and inactive.

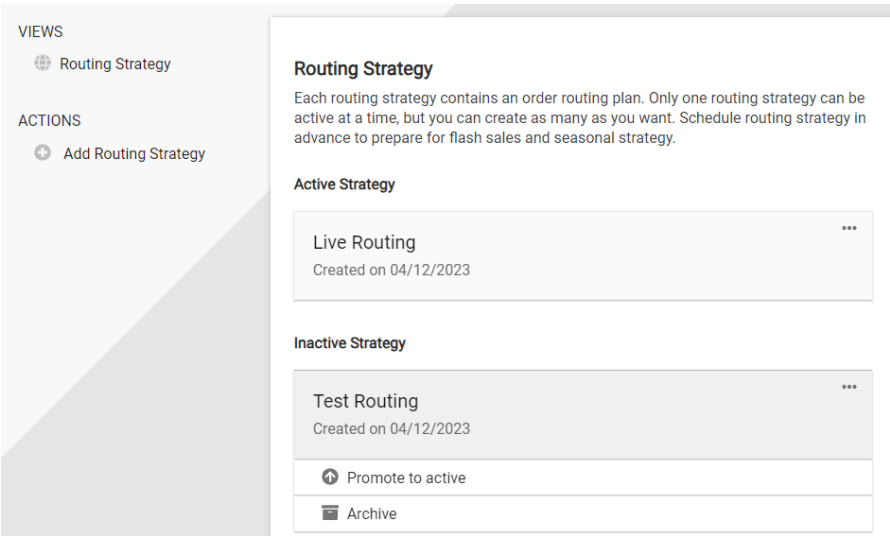
 Note that changes to Order Routing settings may not immediately take effect when processing orders. It may take up to 15 minutes for updates to be reflected in the system while the cache refreshes.

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.

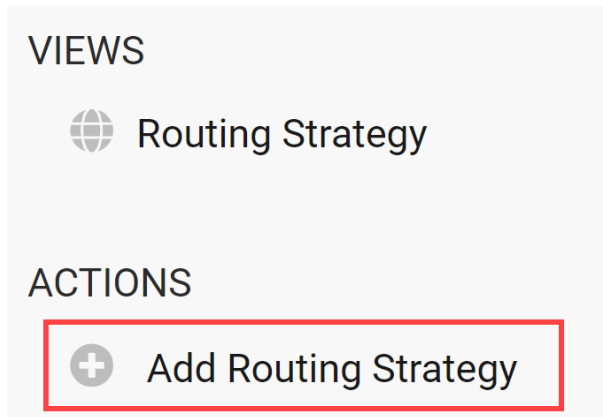


The screenshot shows the 'Routing Strategy' page. On the left, there is a sidebar with 'VIEWS' containing 'Routing Strategy' and 'ACTIONS' containing 'Add Routing Strategy'. The main content area is titled 'Routing Strategy' and includes a descriptive paragraph: 'Each routing strategy contains an order 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.' Below this, there are two sections: 'Active Strategy' with a 'Live Routing' card (Created on 04/12/2023) and 'Inactive Strategy' with a 'Test Routing' card (Created on 04/12/2023). At the bottom, there are two buttons: 'Promote to active' and 'Archive'.

Create a New Strategy

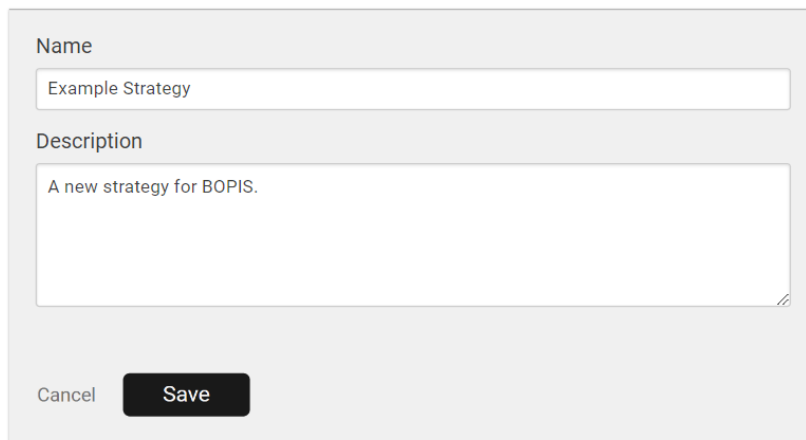
To add a new strategy to this page (without duplicating an existing strategy):

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



2. Enter the strategy **Name** and **Description**.

Inactive Strategy

A screenshot of a form titled 'Inactive Strategy'. It contains two input fields: 'Name' with the text 'Example Strategy' and 'Description' with the text 'A new strategy for BOPIS.'. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

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.

The screenshot displays the 'Routing Strategy / Live Routing' configuration page. On the left is a sidebar with navigation options: Routing Strategy, Locations, Filters, Custom data lists, Custom data sets, Suggestion Logs, and Suggestion Debug. The main content area features two scenario cards. At the top right of the main area are 'Import Scenarios' and 'Export Scenarios' buttons. Each card has an 'Add Scenario' button and a settings gear icon. The 'Direct Ship' card shows 'View Scenarios' last updated on 06/06/2024, with 'Candidate sort strategy: Minimize Shipments' and 'Active' selected. Below are radio buttons for 'Multiple assignments preferred' and 'Single assignment preferred' (selected). A table lists scenarios: Warehouses, Group 1, Group 2, and STH-C, each with an 'Edit' button. The 'Transfer to Location' card shows 'View Scenarios' last updated on 04/26/2023, with the same 'Candidate sort strategy' and 'Active' status. It also has radio buttons for 'Multiple assignments preferred' and 'Single assignment preferred' (selected). Its table lists scenarios: Group 1, STH-C, Group 2, Group 3, and Warehouses, each with an 'Edit' button.

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](#).