Filters

Filters are logic defined within a scenario and used to exclude fulfillment locations that don't match certain criteria. For example, a filter can be created so that orders can only be assigned or viewed if a fulfiller is located within 100 miles of the customer.

Multiple filters can be applied to the same scenario to further narrow the list of fulfillers. For instance, two filters can be created so that the order can be only assigned or viewed if the fulfiller is located within 100 miles of the customer and the order total price is less than \$1,000.



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.

Filter Types

There are three types of filters that determine how its conditions are defined.

- **Custom Value**: Compares an attribute against a specific value. The available logical operators depend on the attribute type, such as Equals or Not Equals for Booleans, Contains or Starts With for text, and Greater Than or Less Than for numbers. For example, a filter could evaluate Fragile = True or Total Order Price greater than or equal to \$1000.
- **Custom Data List**: Compares an attribute against a predefined list of values. These are global lists that can be reused across different filters. For example, a filter could evaluate Shipping Zip/Post Code in [82001, 10001,85001] (Custom Zipcode List).
- **Data Point**: Compares one attribute to another attribute instead of a fixed value. This is useful for dynamic, relative comparisons where both sides of the condition are attribute values. For example, a filter could evaluate Shipment State/Province = Fulfillment Location State/Province.

Manage Filters

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.

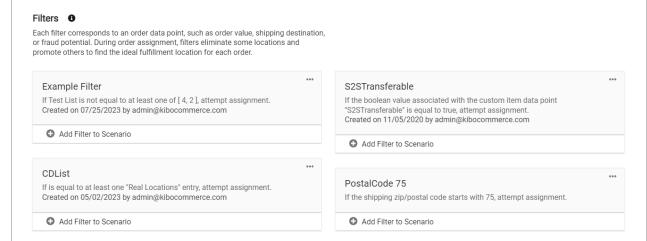
Expand the below sections to view the filter details for the appropriate UI version.

Classic Order Routing UI

If you have not yet upgraded to the new Order Routing UI, then you are using the Classic UI. Here, filters are defined and centrally managed at a global level and can be reused across multiple scenarios.

View All Filters

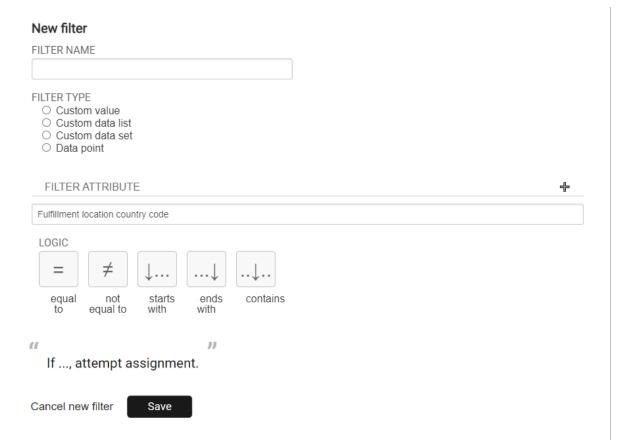
The Filters page of the Order Routing interface displays all existing filters with a summary of what their logic was configured to do under the title. Expand the menu in the top right of a filter to delete, duplicate, or edit the filter (which will open a similar screen as the Create Filter form shown in the next section).



Create a Filter

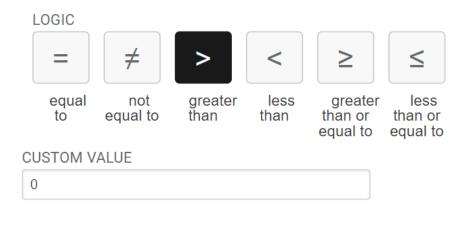
To create a new filter from the Filters page:

- 1. Click Create Filter from the actions menu on the left.
- 2. This will take you to the filter configuration page.



- 3. Enter the Filter Name.
- 4. Enter the **Filter Type**. This is the type of data that the filter will be based off of.
- 5. Select the **Filter Attribute**. This is the property that will determine whether the order should be assigned to a scenario with this filter. For an explanation of how each filter attribute works, see the table after the screenshot.
- 6. Select the **Logic** that should be applied when comparing the attribute. The possible logic conditions will change depending on the data type of the attribute you selected.
 - For logic conditions that support multiple values, such "or" and "any of," you will be
 able to select multiple values from the dropdown. For logic conditions that support
 only single conditions, like "equals" or "not equals," you will only be able to select
 one value.
 - If you select a list filter type, it will support the "in" or "not in" logic conditions. For
 example, if your filter attribute was Material then you could use "in" to compare it
 against the Iron, Steel, and Aluminum custom values. If the item matches any one of
 those values, it will attempt assignment. These are available for both first-class and
 extensible attributes.
- 7. Specify the **Data Point Attribute** or **Custom Value** that the filter should compare the first attribute against.
- 8. The example statement below this option will update to describe your selected filter,

helping you make sure you have configured it correctly. The below example shows a data point filter type.



If the item quantity is greater than 0, attempt assignment.

"

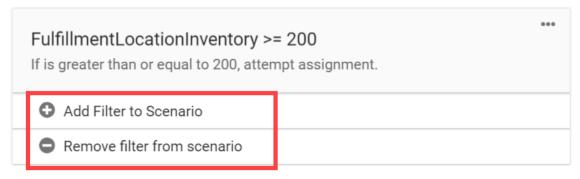
9. Click Save.

"

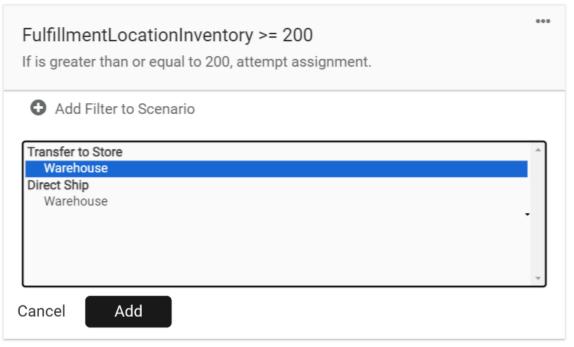
Add or Remove Filter from Scenario

You can change which scenarios a filter is applied to directly from the Filters page.

1. Click **Add Filter to Scenario** or **Remove filter from scenario** underneath the filter you want to update.



2. This will display a list of scenarios across your entire routing strategy. Select one or more scenarios in the list.



3. Click Add or Remove.

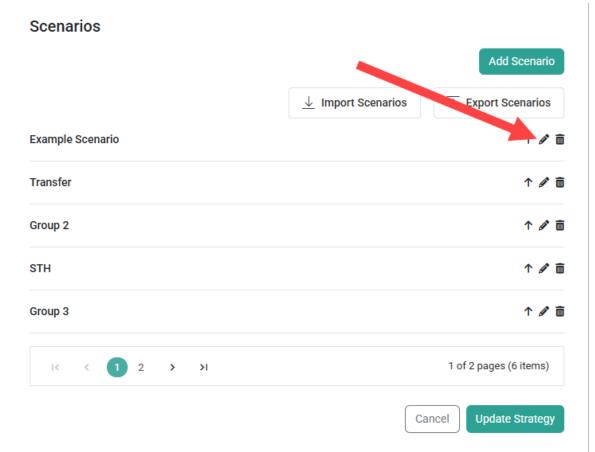
New Order Routing UI

In the new UI, filters are defined within scenarios and cannot be shared across multiple scenarios.

Create a Filter

Filters are defined at the scenario level, meaning they are created and configured within each individual scenario.

- 1. Go to the **List Strategies** page and click the Edit icon on a strategy.
- 2. Either create a new scenario or click the Edit icon on an existing scenario.



- 3. The Filter Criteria is found on Step **3** of the scenario configuration flow.
- 4. To create a new filter, enter a **Filter Name**.
- 5. Select the **Filter Type**. This is the type of data that the filter will be based off of (custom value, custom data list, or data point).
- 6. Select the **Attribute**. This is the property that will determine whether the order should be assigned to a scenario with this filter. For an explanation of how each filter attribute works, see the table in the next section of this guide.



- 7. Select the logical operator that should be applied when comparing the attribute. The possible conditions will change depending on the data type of the attribute you selected.
 - For logic conditions that support multiple values, such "or" and "any of," you will be
 able to select multiple values from the dropdown. For logic conditions that support
 only single conditions, like "equals" or "not equals," you will only be able to select
 one value.

- If you select a list filter type, it will support the "in" or "not in" logic conditions. For
 example, if your filter attribute was Material then you could use "in" to compare it
 against the Iron, Steel, and Aluminum custom values. If the item matches any one of
 those values, it will attempt assignment. These are available for both first-class and
 extensible attributes.
- 8. A field for a **Custom Value**, **Data List**, or **Second Attribute** will be displayed depending on the filter type you selected. Select or enter the appropriate value that the first attribute will be compared against.
- 9. Click **Add Condition** to add the new filter to the table.
- 10. To edit or remove existing filters, click the Edit or Delete icon on the right.



11. Click Save on Step 4 of the configurations to save the filter(s) to the scenario.

Filter Attributes

First class fields, or fields that are available out-of-the-box for use in routing filters, are listed below. They are grouped by location, customer, product, and order field topics and can be selected as filter attributes or comparison properties.

To select custom attributes as filter properties, use Extensible Order Routing to enable those attributes. Once enabled, they will be available when configuring a filter.

Location Fields

These fields are part of the location object in API data.

Field	Display Name	Description
	Hame	

Field	Display Name	Description
N/A	Distance from Fulfillment Location to Order	May be used to limit order assignment to locations within a certain distance from the order location. You can also use this to specify what distance the locations would be excluded from. This is calculated based on the latitude/longitude of the location's address and the order's destination. Note that this does not automatically select the closest location for fulfillment. That is determined by the sort options configured for the route.
locationTypes	Fulfillment Location Types	May be used to limit order assignment to locations that match a specific location type (such as "Warehouse" or "Store"). Note that locations can only belong to one location type.
countryCode	Fulfillment Location Country Code	Contained in the location address, this may be used to either prevent or allow assignment to locations that match a particular country code. This the set-up store location that is not part of the inbound order routing requests. It is recommended to use the "shipping country code" filter instead of this one in most cases.
name	Fulfillment Location Name	This may be used to select fulfillment by locations which have a certain name.
stateOrProvince	Fulfillment Location State/Province	Contained in the location address, this may be used to either prevent or allow assignment to locations that match a particular state or province. This the set-up store location that is not part of the inbound order routing requests. It is recommended to use the "shipping state/province" filter instead of this one in most cases.

Field	Display Name	Description
postalOrZipCode	Fulfillment Location Zip/Postal Code	Contained in the location address, this may be used to either prevent or allow assignment to locations that match a particular zip or postal code. This the set-up store location that is not part of the inbound order routing requests.

Product Fields

Field	Display Name	Description
backorderable	Backorderable	If the inbound routing request has "backorderable" set to true on an item, then this will filter it appropriately.
data	Custom Item Data Point	You can set custom data on order items (either when submitting the order by populating the items[].data object, or by using the exec.setItemData function in API Extension functions where it is available), which will allow you to filter on order items that have this specific (key, value) pair.
isTaxable	Taxable	This may be used to filter assignment on items based on whether they are taxable or not, which is a true/false value.
mfgPartNumber	Part Number	This may be used to filter assignment on items based on a specific Part number.
packageHeight	Height	This may be used to filter assignment based on the dimensions of the item's package.
packageLength	Length	This may be used to filter assignment based on the dimensions of the item's package.
packageWeight	Weight	This may be used to filter assignment based on the dimensions of the item's package.
packageWidth	Width	This may be used to filter assignment based on the dimensions of the item's package.
productCode	SKU	This may be used to filter assignment on items with a specific SKU.

Field	Display Name	Description
productName	Product Title	This may be used to filter assignment on items based on a specific product name.
upc	Item UPC	This may be used to filter assignment on items based on a specific UPC.

Order Fields

Field	Display Name	Description
countryCode	Shipping Country Code	Contained in the shipping address, this may be used to either prevent or allow assignment to locations that match a particular country code. This is the customer's shipping address included in the inbound order routing requests. It is recommended to use this filter instead of the "fulfillment location country code" in most cases.
express	Express Shipping	May be used to filter out locations that do not offer express shipping. You can enable this on a location by toggling the "Can Fulfill Express Orders" option in the Locations page of the Admin UI.
code	Pickup Location Code	For transfer orders, this may be used to filter on locations where the original pickup location matches a certain code.
postalOrZipCode	Shipping Zip/Postal Code	Contained in the shipping address.
quantity	Item Quantity	May be used to prioritize whether certain locations fulfill larger or smaller orders.

Field	Display Name	Description
stateOrProvince	Shipping State/Province	Contained in the shipping address, this may be used to either prevent or allow assignment to locations that match a particular state or province. This is the customer's shipping address included in the inbound order routing requests. It is recommended to use this filter instead of the "fulfillment location state/province" in most cases.
total	Total Order Price	This may be used to filter on orders less than, greater than, or equal to a certain amount if you want certain locations to handle larger or smaller order values.
type	Туре	Filters orders based on whether they are the "Offline" or "Online" order type.