Ship to Store Transfer

Ship to Store Transfer (STST) shipments provide in-store pickup of items that the pickup location did not initially have in stock. Items not in stock are provided as "transfers" that are filled from a supply location, such as a warehouse, to the pickup fulfillment location.

Kibo creates a child shipment that is assigned to the supply location. The supplier will ship these items and they will be routed to the fulfiller. The parent pickup shipment is put in Waiting for Transfer, and from this stage the transfer shipment status can be reviewed.

This guide explains the steps of the STST fulfillment process and demonstrates how to request and fulfill these orders in the Kibo Composable Commerce Platform Fulfiller UI.

Transfer Process Steps

The parent shipment goes through its standard pickup process with the addition of the Wait for Transfer step. When inventory is found to be unavailable, this pickup shipment is placed into this state while a transfer shipment is created and shipped.

Once the transfer is shipped, it must be received and validated by the pickup location before it can be marked Complete. The parent shipment only moves on to the Customer Pickup state once all associated transfers have been received (in the case where multiple transfers were required).

Below is a simplified depiction of the process flow for a pickup and its associated transfer. The transfer is created when the pickup location indicates that items are not in stock, and the pickup shipment remains in the Wait for Transfer state until the incoming transfer is received and validated. Then the transfer is marked complete, and the parent shipment continues on to its customer pickup step to finish fulfillment.

### BOPIS (Pickup) Shipment

- **Accept Shipment**
  - shipment accepted
  - shipment rejected

- **Print Pick List**
- **Validate Items in Stock**
- **Wait for Transfer**
- **Customer Pickup**
- **Complete**

- **Transfer Shipment**
  - inventory not in stock; transfer created
  - transfer received; pickup can commence.
  - print packing slip

### Requesting and Processing Transfers

On the fulfiller interface dashboard, the user can see shipments that are assigned to the location in either the Shipment Quick View at the top of the screen or the Assigned Shipments table below the quick view.
In addition to the Transfer Shipments tabs of both tables, pickup shipments that are waiting on their transfers can also be reviewed under the Pickup section of the tables.

<table>
<thead>
<tr>
<th>Alert Type</th>
<th>Shipment Placed</th>
<th>Shipment Type</th>
<th>Shipment Num</th>
</tr>
</thead>
<tbody>
<tr>
<td>Late Shipments</td>
<td>04/07/2020, 9:15:27 AM GMT-5</td>
<td>BOPIS</td>
<td>58</td>
</tr>
<tr>
<td>Late Shipments</td>
<td>04/06/2020, 9:15:47 PM GMT-5</td>
<td>Transfer</td>
<td>57</td>
</tr>
</tbody>
</table>

Select any pickup shipment and click **Finish Fulfilling Shipment** to continue with fulfillment.

1. Transfers are requested at the Validate Stock step of a pickup shipment.
2. Select the **In Stock** quantity.
3. Click **Transfer Shipment** to request a transfer for the remaining items. This button will appear as long as the available quantity is less than the target quantity of the shipment.
4. A pop-up will appear to confirm the transfer request. Enter a reason such as "Item Not Available." These reasons may be customized for the implementation, and not the exact same list as shown here.
5. Click **Confirm**. This will submit the request and the pickup shipment will be sent to the Waiting For Transfer step.
The transfer shipment is assigned to a location. A user at that location can view the assigned transfers and fulfill them.

1. The first step is to validate stock by selecting the **In Stock** quantity.
2. If there is enough available stock, click **Proceed To Print Packing List**. If not, request another transfer.
3. Pack the shipment and send it to the fulfiller that requested it, much like a regular shipment.
After the transfer is shipped, it will be listed in the Validate Incoming Transfer section of the fulfiller's Assigned Shipments table. They must acknowledge that they have received it.

1. Select an incoming transfer shipment to open the Validate Transfer Stock step.
2. Indicate the available quantity that is now in stock from the transfer.
3. Click **Receive Incoming Items** to mark the transfer as Received.

When that is done, the parent pickup can be released to the Provide to Customer state. At this point, an email notification is triggered to inform the customer that their items are ready to be picked up. When the customer comes into the store:

1. Click **Customer Accepts Entire Shipment** to mark the shipment as Fulfilled, or:
2. Click **Customer Wants to Cancel** to cancel the pickup.

**Barcode Scanners**

Scanning capability is available for the Validate Stock step, making it easier to input the quantity you have in stock for that shipment. Both USB plug-in laser and camera scanners are supported, though camera scanners are only available
through the mobile fulfiller application and will use the camera of that mobile device.

By default, you can input your laser scan into the text field of the In Stock column in the Validate Stock table. However, you can also implement a "Scan UPC/SKU" text box (shown below, using a BOPIS example) that displays above the table to input your scan results. This is a more straightforward method compared to the default interface, but requires a custom theme change to display the field. In your theme, simply activate the `isItemUPCScanAllowed` setting within the language file.

You may also want to reverse the way that the Validate Stock table displays counts when using laser scanning. By default, the In Stock field is populated with the expected count of the order and the fulfiller is expected to decrease this value for any quantity they are rejecting. However, you can instead start the In Stock count at 0 and scan items to increase the value. To enable this behavior, find your `ValidateStockQuantity` theme settings and set `defaultZeroQuantity` to "1" and set both `defaultShipmentQuantity` and `locationInventoryQuantity` to "0" as shown below.

```
"ValidateStockQuantity": {
  "defaultZeroQuantity": 1,
  "defaultShipmentQuantity": 0,
  "locationInventoryQuantity": 0
}
```

Partial Pickup

After the fulfiller validates stock on hand, it is possible for the customer to pick up the on-hand items before the transfer has arrived.

When a shipment is in Waiting For Transfer and partial pickup is possible, the on-hand items are displayed in their own section as shown. Click Pickup to split those items into another shipment that can be marked as Fulfilled while the transfer remains pending. The customer can then pick up the transfer items when they arrive.
If Partial Pickup is available, the customer will receive a Partial Pickup Ready email informing them that they can pick up some items. This is a basic example, but the template can be customized per site.

Transfer Email Messaging

In addition to the Partial Pickup email, there are two other email messages (Transfer Shipment Created and Transfer Shipment Shipped) that can be sent during the transfer process to keep the customer up-to-date on the progress of their order and communicate with them that there are some items that must be waited on before the pickup is ready.

Transfer Shipment Created informs the customer that some inventory in their order was not available and is being transferred to their pickup location. This is triggered upon the creation of a transfer shipment.

Transfer Shipment Shipped informs the customer that their transferred items have been shipped and they should be on the lookout for a pickup email soon. This is triggered upon completion of the transfer shipment’s fulfillment, before it is received by the pickup location.
All of the email templates are installed on the site theme. Like the Partial Pickup Ready email, there are basic versions that can then be customized with business branding and formatting adjustments. View the transfer templates by going to Main > Content > Editor and then clicking Email Templates under Pages in the navigation menu on the right. The template you select will be displayed on the page.

Transfer Event Notifications

As each of the previous steps are passed through in the Fulfiller Interface, event notifications will be triggered just like they are for standard STH and BOPIS (pickup) orders/shipments. The pickup shipment will send notifications for its standard BOPIS status changes, while additional notifications will be sent for the following transfer shipment events:

- Transfer Shipment Created
- Transfer Shipment Assigned
- Transfer Shipment Shipped
- Transfer Shipment Sent to Customer Care

See Event Notifications for the template that these shipment status change events follow.