

Substitute Products Overview

If a product is unavailable after an order has been placed, you can substitute it with a similar product. These substitutes are pre-configured at the product level, and then either performed automatically or manually selected by an Order Admin or Fulfiller user. This allows you to fulfill the order for the original sale price, improve customer experience by delivering products similar to their desired product, and supports business models that may frequently use substitutes such as groceries.

This feature requires Order Management and either eCommerce or an OMS catalog. If you are using a catalog, ensure that all products in imported order data are valid products in your catalog.

How Substitutions Work

If a product is out of stock and not configured for substitutes, then any unavailable quantity must be transferred or rejected. But if a product is configured for substitutions, there are a few different scenarios where replacing it with another product may be useful:

- A product is substituted one-to-one with a different product.
 - For example, 1 quantity of Product A is substituted with 1 quantity of Product B.
- A product is partially substituted with a different product.
 - For example, a shipment requires 5 quantity of Product A but only 2 are in stock. The remaining 3 quantity is substituted with Product B.
 - If there is not enough substitute quantity available to fulfill the original amount, then the remaining quantity can be transferred or rejected. If the above Product B only had 1 quantity available, then that would be substituted into the shipment and a transfer or rejection would be made for the final 2 quantity.
 - Alternatively, more than one substitute product may be used. For example, 1 quantity of Product B and 2 quantity of a Product C could be substituted.



Substitutions are supported for STH, BOPIS, and Delivery shipments.

In the case of Delivery, the Delivery service item will always remain on the shipment and cannot be substituted. This ensures that the delivery will still be provided as requested by the customer even when the original shipment item(s) is replaced with an alternative. However, any shipment items with an associated Assembly service item cannot be substituted.

Manual and Automatic Substitutions

Enabling substitutions will allow Order Admin and Fulfiller users to perform manual substitutions, but you can also allow substitutions to be made automatically upon shipment creation. If no

inventory is available for an item at that point, then the system will attempt to perform a substitute before considering a transfer (if transfers are enabled). Substitute products are attempted in order of a given priority.

For example:

- The system goes to create a shipment and finds that there isn't enough inventory for a product that is a 60-ounce bottle. It automatically substitutes that line item with a 40-ounce bottle that has available inventory.
- The system goes to create a shipment and finds that there isn't enough inventory for a product that is a 60-ounce bottle. It attempts to automatically substitute the item with a 40-ounce bottle, but inventory is not available. The system moves to the second-highest priority substitute, a 60-ounce bottle from another brand, and that product has available inventory so the substitution is performed.
- A shipment is being [consolidated](#) and inventory is not available at the consolidation location, so the system attempts to substitute based on inventory at that specific location before attempting a transfer via Order Routing.