Substitute Products Overview

If a product is unavailable after an order has been placed, you can substitute a similar product during the fulfillment process. These substitutes are pre-configured at the product level, and then either performed automatically or manually selected by a fulfiller. 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 substituted for a different quantity of a different product.
  - For example, 1 gallon of Product A is substituted with 2 half gallons 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.

> ℹ️ Substitutions are available for all fulfillment types except Curbside Only. Items that include Assembly are not able to be substituted.

Manual and Automatic Substitutions

Enabling substitutions will allow fulfiller users to perform manual substitutions in the Fulfiller UI, 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.

Substitutions in Order Details

After a substitution has been made, the Admin UI's order shipment details will indicate the affected products.

Type	Shipment	Last Updated	Status	Shipment S
Ship to Home	708	09/19/24 12:28:48	READY	329992

▼	Items (9)	Shipped From Loc1	Transfers	Custom Data	Shi

Line	Image	Code
1		Code: SubstituteProduct1 Substituted For : ExampleProduct1
2		Code: SubstituteProduct2 Substituted For : ExampleProduct2

Configure Substitutions

Contact Kibo Support to have this feature enabled in your tenant settings. Then you will be able to enable repricing, add the substitute attribute to product types, and select the substitutes on products.

Enable Repricing

Repricing on substitutions is optional. When a reprice occurs, the substitute's item price will be applied but discounts will not be re-evaluated. Any discounts on the original item will be copied to the substitute item as-is. Shipping and handling will be copied from the original item to the substitute item, tax will be refreshed, and the shipment total will be recalculated. Payment may or may not be affected, depending on the difference between the substitute item and original item's pricing:

- If the substitute item's price is lower than the original item, then the difference will be credited to the customer. If Auto Capture is enabled, then the system will do this automatically as long as a payment has already been captured. If Auto Capture is not enabled, you will have to credit the amount manually.
- If the substitute item's price is higher than the original item, the payment status will be set to Errored and all shipments on the order will be blocked from fulfillment until an additional payment for the difference is authorized. An email notification can be sent to the shopper informing them of this and directing them to Customer Care for more details.
- If the substitute item's price is the same as the original item, there will be no impact to payment.
- In the case of bundled products, pricing is distributed across all items in the bundle before substitutions are made. When repricing is enabled, the substitute item's catalog price will replace the original item's distributed price without affecting other items in the bundle. If repricing was not enabled, then the original item's distributed price would still be applied to the substitute item.

Repricing is disabled by default. To enable repricing on all substitutions:

1. Go to **System** > **Settings** > **General** > **Site.**
2. Locate the **Fulfillment Settings** section.
3. Toggle **Reprice on Substitution**.
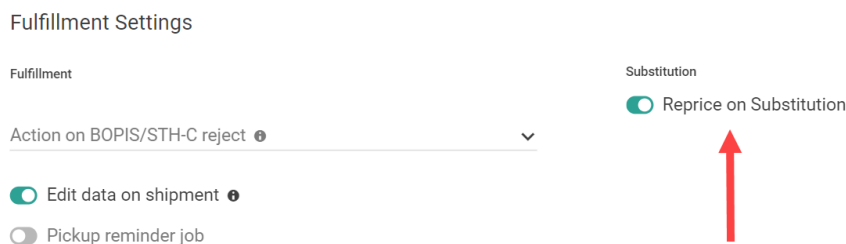
4. Click **Save**.

Enable Email Notifications

In order to send optional email notifications to shoppers, enable them under your email settings:

1. Go to **System** > **Settings** > **General** > **Email**.
2. Scroll down to Shipment Emails and toggle on **Substitution - payment required** to send an email notification when the substitute item's price is higher than the original item after repricing. This prompts the customer to provide additional payment before the order can be fulfilled.

3. Scroll down to Order Emails and toggle on **Item Substituted** to send an email notification when an automatic substitution takes place.
4. Click **Save**.

Add Attribute to Product Types

Enable substitutions in your catalog using the substitute property in the product type configurations.

1. Go to **System** > **Schema** > **Product Types**.
2. Select a product type. All usage types are supported.
3. In the **Properties** tab of the product type settings, select the **Substitute Products** attribute.
   - If the product is a Configurable Product, then substitutes must be set up at the variant level as each of its product variants has its own product code. In this case, select the **Substitute Variants** attribute instead.

Properties

Attribute

Subscription Frequency

Subscription Mode

Substitute Products

Substitute Variants

testyboi

Trial Days

Trial Product Code

☐ Required by admin

☐ Allow Multi select

Display Group * ⓘ

Storefront Details ▼

☐ Hidden from Shopper

Cancel

Done

4. Click **Done** to add it to the product type.

5. If you want the system to perform automatic substitutions on this product type, also add the **Allow Auto Substitutions** attribute. If this attribute is not added, then substitutions can only be performed manually by fulfillers.

Properties

Attribute

Allow Auto Substitutions

built prod

English only first

future-inventory-enabled

☐ Required by admin

Display Group * ⓘ

Storefront Details ▼

☐ Hidden from Shopper

Cancel

Done

6. Click **Save**.

Select Substitutes on Products

After adding the attribute to product types, select any product of that type in your master catalog and set up its substitute(s). Substitutions may be made for any standard products, variant products, product extras, bundles, bundle components, items in collections, and digital items, with the exception of service items.

1. Go to **Main** > **Catalog** > **Products**.
2. Click the product that you want to configure substitutes for.
3. In the **Properties** tab of the product settings, enter eligible substitutes in the **Substitute Products** field. If the product usage is Configurable Product with Options, use the **Substitute Variants** field to select eligible variants as substitutes instead.
   - The order in which you add these substitutes will be the order of priority used by automatic substitutions, from highest to lowest.

Substitute Products

| Cheese ✕ | Cheese Goat ✕ | Cheese Cheddar ✕ | Cheese Cream ✕ | Cheese - Substitutable ✕ |

CH06 - Substitutable ✕

4. If you want to perform automatic substitutions, toggle on **Allow Automatic Substitutions**.

Allow Auto Substitutions

☑

5. Click **Save** when you have finished adding all desired substitutes to your product.

> ℹ️ There is a limit of 10 substitutes per product. If you don't want to use substitutes for a particular product, then you do not have to select any in its product configurations (even if it belongs to a product type enabled for substitutions).

Shopper Preferences

Shoppers can indicate whether they're open to substitutions during the cart or checkout process, except when creating a B2B quote or creating a subscription.

- If the shopper is willing to accept substitutions, the list of potential substitutes for that product will be displayed. The shopper can select one as their preference, and the system will attempt to substitute with that item first when an automatic substitution is performed. If the shopper doesn't indicate a preferred item, then the system will attempt substitution in order of priority as defined in the product settings.
- If the shopper indicates that they will only accept substitutions at fulfillment, then substitutions will not be performed automatically and fulfillers will be responsible for contacting the shopper and manually performing any substitutions.
- If the shopper is not willing to accept substitutions, then substitutions will not be performed automatically nor available during fulfillment.

Customer service representatives can also indicate whether substitutions are allowed when creating an offline order on behalf of the shopper. Use the dropdown menu shown below to select **Yes**, **No**, or **Requires Shopper Consent** (meaning that they will only accept substitutions at fulfillment).

Line	Image	Code	Name

No order items to display

Black Tshirt

Allow Substitution Yes ▼ ⓘ

Headless Storefront Integration

When making calls to add cart, checkout, or order items, use `optIn` and `substituteProductCode` (or `substituteVariantCode` if using a product variant as a substitute) in the item-level data to indicate the shopper's preferences. You can edit these preferences again with the Update Substitution Info endpoints for checkouts and orders, as long as the order is not yet Accepted.

```
{
  ...
    "fulfillmentLocationCode": "WarehouseLocationCode001",
    "fulfillmentMethod": "Pickup",
    "lineId": 1,
    "product": {
      "productCode": "product_01",
      "name": "product_01"
    },
    "quantity": 1,
    "substituteInfo": {
      "optIn": "Yes",
      "substituteProductCode": "product_02"
    }
  ...
}
```

> ⓘ The `optIn` flag may be set to Yes, No, None, or OnlyAtFulfillment. If you want to perform substitutions regardless of the shopper's preference, then set it to None.

Substitutions in Admin UI

Substitutions can be made in the Admin UI on Pending orders, shipments in the Accept Shipment step, and when creating a new shipment on an order. For instance, a customer service representative can select a substitute product and replace the original item with that substitute prior to fulfillment.

To perform a substitution on a Pending order or when creating a new shipment:

1. Go to **Main** > **Orders** > **Orders** and select the order you want to update.

2. Either click **Edit Details** or go to the Shipments tab and click **New Shipment**. The following steps will be similar for either case.

3. Whether you are editing an existing line item or adding a new one, the **Replace item** button will appear as long as all required details have been provided for the line item. This is available for both subscription and one-time-purchase items.
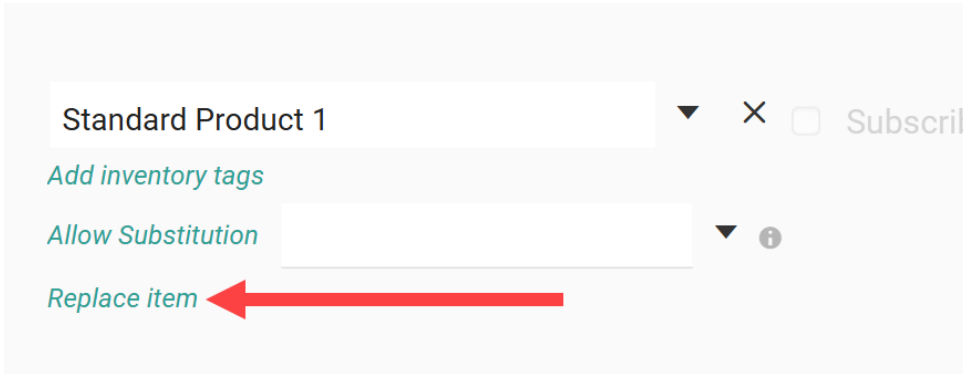
4. In the Add Replacements popup, check the item(s) you want to replace it with. Only substitutes with available inventory will be shown. Hover over the inventory values to view current and future inventory levels. BOPIS will show available inventory at the fulfillment location selected by the shopper, while STH will show aggregate inventory.
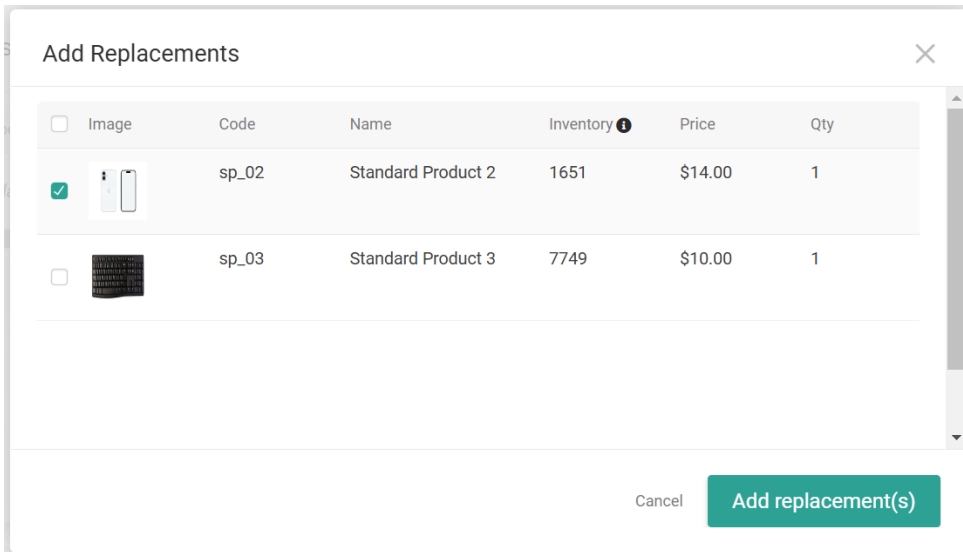
5. Click the Quantity value to enter the substitute quantity.

6. Click **Add replacement(s)**.

7. This will add the substitute to the order as its own line item in place of the original item.

8. Click **Save**.

To substitute an item on an existing Ready shipment that has not yet been accepted by the fulfiller:

1. Go to **Main** > **Orders** > **Orders** and select the order whose shipment you want to update.

2. Go to the Shipments tab.

3. Expand the action menu for a shipment item and click **Substitute**.
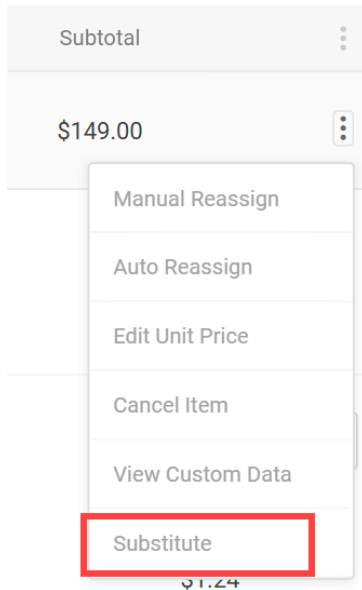
4. Check the substitute item(s) you want to use from the list of eligible substitutes available at the fulfillment location.
5. Select a **Reason** for the substitution.
6. Click the **Quantity** value to enter the substitute quantity.
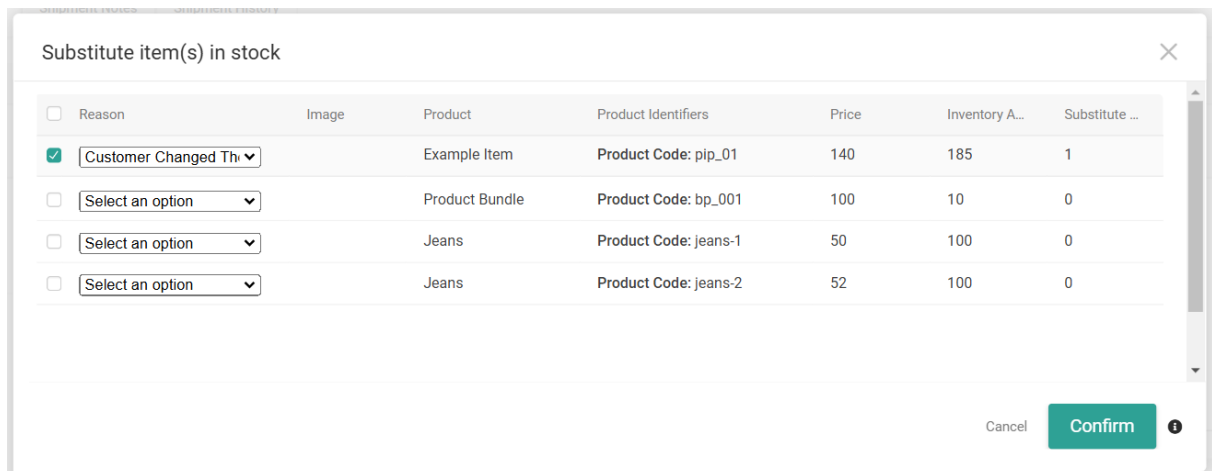
7. Click **Confirm**.
8. The substitute will be displayed as a new shipment line item. If inventory was already allocated for the original item, it will be deallocated and the substitute will be allocated instead. Any quantity of the original product that was not substituted will remain on the shipment.

Substitutions in Fulfiller UI

Substitutions occur in the Validate Stock step of shipment fulfillment and are independent of any reassignments or transfers. When a non-Assembly item in an STH or BOPIS (not Curbside or Delivery) shipment is unavailable and substitutions are set up for the product, the Substitute

button will be displayed for that item.

1. At the Validate Stock step, if the In Stock Quantity is less than the required Quantity then **Substitute** will appear next to that line item. Click this to begin the substitution process.
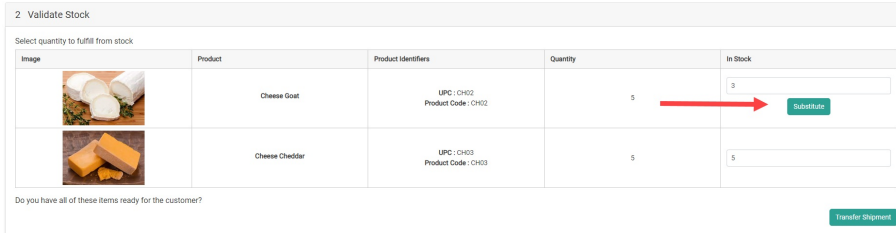
2. Eligible substitutes and their available inventory at the fulfillment location will be displayed. Enter the quantity of the substitute(s) you want to use and a reason for the substitution.
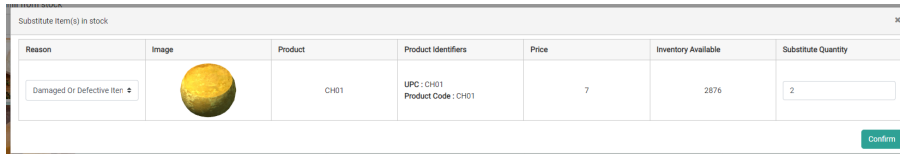
3. Click **Confirm**.

4. The substitutes will be displayed in a new table underneath the original line items, where you can click **Remove** to remove them from the shipment if desired.
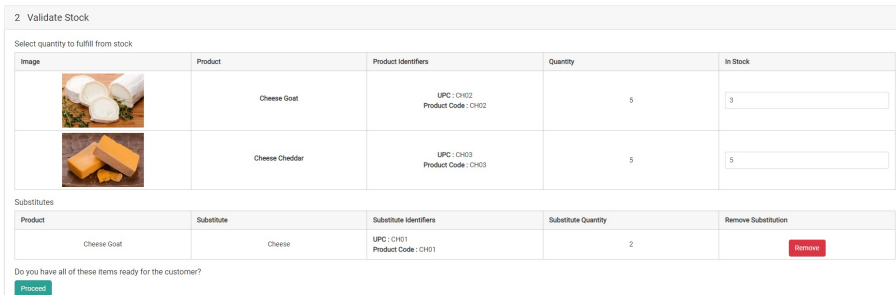
5. You can now continue with the fulfillment process as usual. The substitute item's inventory will be allocated while the original item's quantity will be deallocated. The substitutions will also be included on any packing slips and pick sheets.

Once a substitution has been made, information about the item and substituted quantity is listed on the shipment details and can be displayed in Shipment Confirmation notifications.

Cancel and Return Substitutions

If the original line item is cancelled from the shipment, any associated substitute item(s) will be removed from the shipment as well.

If a substitute item is returnable, then it will be listed in the Create Return and Process Return modals. Substitutes will be labelled to help identify them and which shipment item they were originally substituted for.