Scenarios

Scenarios are groups of locations that an order can be routed within, filters that exclude certain locations from different routing cases, and after-actions that control which steps Order Routing takes when determining whether that scenario is a match for shipment items. Fulfillment paths within routing strategies are usually made up of multiple scenarios, ranked by priority.

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 scenario 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, a single scenario can be used across multiple routes (e.g. Direct Ship, Transfer, and Return).

View All Scenarios

Scenarios are displayed as part of each fulfillment path summary in the routing strategy details. To view more detailed information, click **View Scenarios** on that page. This will display a list of all scenarios assigned to that path the following information and actions.

- Scenario Details: Click the scenario name to view more details and a list of the locations within the scenario.
- **Status**: Click the status toggle to activate or deactivate this scenario as needed. If disabled, it will be skipped during assignment.
- **Filters:** Each of the filters applied to the scenario are listed, with the ability to create a new filter or add/remove existing ones.
- After-Actions: Click the icon in the corner of a table column to change the after-actions that should be taken when the scenario is determined to be a match for the order (can fulfill entire order), a partial match (can fulfill some of the order items), or no match (cannot fulfill any items in the order). See the After-Action Logic section for an explanation of these options.
- Use the icons in the top right corner to delete, duplicate, or change the current rank of a scenario.

is strategy for Direct Ship route ations. When a match is locate uting behaves when items are p	attempts to match order items with fulfillment d, the items are assigned. You choose how Order artially matched or no match is available.		
Warehouses View 5 locations and 0 Filters Created on 06/05/2024 by adm Last updated on 06/10/2024 by	in@kibocommerce.com y admin@kibocommerce.com		1 D 1
 Active Add/Remove Filter Create Filter 			
fatch located	Partial match	Ľ	No match
ssign entire order to a location in nis scenario	Split order by quantity, assign quantities without inventory to Back	torder	Split order by quantity, assign quantities without inventory to Customer C
Group 1			â 🏽 O 2
View 1 location and 0 Filters Created on 02/24/2023 by adm Last updated on 06/05/2024 by	.in@kibocommerce.com / admin@kibocommerce.com		
 Inactive Add/Remove Filter Create Filter 			
latch located	Partial match	Ľ	No match
ssign entire order to a location in his scenario	Split order by quantity, assign if entire order can be fulfilled		Split order by quantity, assign if entire order can be fulfilled
eate a New So gin creating a ne enario in the to Direct Ship	cenario w scenario from the routing str p right of the desired fulfillment	ategy path.	details page by clicking Add
eate a New So gin creating a ne enario in the to Direct Ship	cenario w scenario from the routing str p right of the desired fulfillment	ategy path.	details page by clicking Add
eate a New So gin creating a ne enario in the to Direct Ship View Scenari Last updated	cenario ew scenario from the routing str p right of the desired fulfillment os on 06/06/2024 by admin@kit	ategy path.	details page by clicking Add Add Scenario
eate a New So gin creating a ne enario in the to Direct Ship View Scenari Last updated Candidate so	ew scenario ew scenario from the routing str p right of the desired fulfillment os on 06/06/2024 by admin@kik rt strategy: Minimize Shipme	ategy path. pocom	details page by clicking Add Add Scenario
eate a New So gin creating a ne enario in the to Direct Ship View Scenari Last updated Candidate so O Active	ew scenario from the routing str p right of the desired fulfillment os on 06/06/2024 by admin@kik	ategy path.	details page by clicking Add
eate a New So gin creating a ne enario in the to Direct Ship View Scenari Last updated Candidate so O Active O Multiple a	ew scenario pright of the desired fulfillment os on 06/06/2024 by admin@kit ort strategy: Minimize Shipme ssignments preferred	ategy path.	details page by clicking Add

This will direct you through four pages of the scenario creation flow. On the first page:

1. Enter the scenario's **Name** and **Description**.

0

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Routes /	Add	Scen	ario
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Add Scenario

Step 1 of 4: Create scenario

Name Scenario

Description (optional)

Scenario settings

Determines scenario type, behavior, and sorting. Sorting by rank allows you to manually prioritize tenants. Sorting by distance tries to assign items to the closest tenant. Load balanced sorting attempts to distribute orders evenly among tenants.

Primary sorting (optional)

Secondary sorting (optional)

Default scenario - new locations are added automatically

SELECT ROUTING STRATEGY AND SET LIMITS

A copy of this scenario will be created for each routing strategy selected.

<	Direct Ship			
	Transfer to Location			
Lim	it fulfillment to	Shipments -	per	Hour •

~						
r - 1	3/7	÷	12		н.	~
						_
\sim					<i>a</i> .	<u> </u>

- Configure the primary and secondary sorting options to determine how to prioritize locations within a scenario. In the event of a tie using the primary sort, the secondary sort will determine which location is preferred.
 - **Rank:** Allows manually prioritized locations by numeric rank.
 - **Distance:** Prioritizes locations closest to the shipping address.
 - Velocity: Based on maximum LTD (Life to Date) inventory values of the order items at each location candidate. Prioritizes locations with lower values to improve product turn and reduce markdowns by assigning orders to locations with the slowest moving inventory.

- Carrier Cost: Queries FedEx to get the actual shipping cost and prioritize locations with the lowest costs. Note that this does not calculate based on the rates of any other carriers.
- **Load Balanced:** Distributes order assignments evenly among locations.
- **Highest Available Inventory**: Aggregates available inventory across all requested items and prioritizes the location with the highest inventory count.
- Lowest Available Inventory: Aggregates available inventory across all requested items and prioritizes the location with the lowest inventory count. This is best used with Reverse Logistics routes, as it allows you to restock items at the locations that need it the most.

Scenario settings

Determines scenario type, behavior, and sorting. Sorting by rank allows you to manually priortize tenants. Sorting by distance tries to assign items to the closest tenant. Load balanced sorting attempts to distribute orders evenly among tenants.

Primary sorting (optional)

-	
Rank	
Distance	
Velocity	
Carrier cost	icall
Load balanced	
Test (Custom)	

A copy of this scenario will be created for each routing strategy selected.

- Direct Shin
- 3. Indicate whether this should be the default scenario that new locations are automatically added to or not.
- 4. Select which route the scenario should be applied to. Selecting multiple routes will copy the scenario to each.
- 5. Click Continue.

If locations were not already selected before initiating scenario creation, you are able to add locations on the next page.

- 1. Select one or multiple locations by selecting the checkbox.
- 2. Click **Continue**.

Continue	(100)								
Location ID Q	Locations (100)	Q	Name	Q	Postal Code	Q	Status	Existing Sce	enarios
100000	0		Location 0		Here California 93823		Active	2	
100001	1		Location 1		Great Falls MT 59405		Active	4	
100002	2		Location 2		Vancouver BC V5K 0A2		Active	2	
100003	3		Location 3		Havre MT 59501		Active	3	

The next page allows you to add filters. If no filters are desired, just click **Continue**. To select and/or create filter(s), complete the following steps.

- 1. Select existing filter(s) if applicable, or click **New Filter**.
- 2. If creating a new filter:
 - Enter new **Filter Name**.
 - Select **Type**: Set up a custom value or choose an existing data point.
 - Select **Filter Attribute**: The parameter to base the filter on.
 - Select **Logic**.
 - Select Comparison Property or Custom Value.
- 3. Click **Continue.**

Add Scenario Step 3 of 4: Add filters	
Continue New filter	
BO If the backorderable flag is equal to true, attempt assignment.	

Finally, you must configure the scenario's after-actions. For more information about afteraction behavior and what these options mean, see the After-Action Logic section of this guide.

1. Select the preferred behavior that Order Routing should take in the event of only finding

partial inventory for an order available in this scenario.

2. Select the behavior that Order Routing should take if there is no available inventory for an order in this scenario.

Add Scenario

Step 4 of 4: Add after-actions

Order Routing attempts to assign the full order before partial assignment is considered. After actions override the default failover behavior established in Configuration Center.

If Partial inventory found Then: Try next scenario (default)

If No inventory found Then: Try next scenario (default)-

Save scenario

3. Click Save Scenario.

Edit an Existing Scenario

To edit a scenario's basic information from the routing strategy details:

 Either click Edit on a scenario (shown below) or click View Scenarios and then a scenario's name.

Direct Ship View Scenarios Last updated on 0 Candidate sort st O Active Multiple assig Single assign	06/06/2024 by admin@ rategy: Minimize Ship nments preferred nent preferred	kibocommerce.c	Add Scenario	*
Scenarios				
Warehouses			Edit	
Group 1			Edit	
Group 2			Edit	1
is will display the	e scenario details. Cli	ick the Edit icc	on in the top right.	
Direct Ship			0	Add Location
Warehouses Active Add/Remove Filter	lter			
Sort by Distance				
Match located	Partial match	Ľ	No match	
Assign entire order to a location in this	Split order by quantity, assigr inventory to Backorder	n quantities without	Split order by quantity, assign inventory to Customer Care	quantities with

3. Enter the scenario's **Name** and **Description**.

Warehouses	
Description (optional)	
Default scenario - ne	w locations are added automatically
Default scenario - ne imit fulfillment to	w locations are added automatically Shipments Per Hour
Default scenario - ne imit fulfillment to	v locations are added automatically Shipments • per Hour • and Select method

- 4. Indicate whether the scenario is the **Default scenario** for new locations to be added to.
- 5. Select a **Sort** for this scenario, such as rank or distance.
- 6. Click Save.

Manage Scenario Filters

While viewing scenario details, click either **Create Filter** (which will take you to the filter configuration flow) or follow the below steps to update the filters currently assigned to the scenario:

1. Click Add/Remove Filter.

Warehouses



Sort by Distance

2. This will open a pop-up with all existing filters in your routing strategy. Click the checkboxes as needed to select filters you want to add and unselect filters you want to remove.

	If is equal to "Distribution Warehouse 1", attempt assignment.	
	ORDERATTRIBUTEZONE == LOCATIONATTRIBUTEZONE If Zone is equal to the zone, attempt assignment.	
	PRODUCT2ONLY If the item upc is equal to "PRO2", attempt assignment.	
	PRODUCTWITHOPTIONSONLY If the item upc contains "OPTIONS", attempt assignment.	
_		

3. Click Save.

Manage Scenario Locations

You can both add new locations and edit existing locations while viewing a scenario's details.

Add New Locations

To add new locations to a scenario from the routing strategy details::

 Either click Edit on a scenario (shown below) or click View Scenarios and then a scenario's name.

Direc	rt Ship		Add Scenar
View S	Scenarios		
Last u	pdated on 06/06/2	024 by admin@kibocommerce.com	m
Candi	date sort strategy:	Minimize Shipments	
•	Active		
O Mu	Iltiple assignments	preferred	
Sin	igle assignment pre	eferred	
Scena	arios		
🕜 V	Varehouses		Ed
•	Group 1		Ed
-			Ed



3. Select locations from the list by clicking their checkboxes.

Dire	ect Ship							
W	/arehouses							ľ
((Active Add/Remove Fi Create Filter 	lter						
So	ort by Distance							
Mat	tch located	Partia	al match	Ľ	No match			Ľ
Ass a lo sce	ign entire order to cation in this nario	Split (inven	order by quantity, assign qu tory to Backorder	antities without	Split order by inventory to C	quantit Sustome	ty, assign quan er Care	tities without
	All Add Loca	ntion to	scenario 1 selecte	ed				
	Location Code	Q	Name	Q	Postal Code	Q	Status	
	0		Location Zero		00000		Active	
Mission	ing 1 of 1 M	oro				۸d	d Location t	oconario
o edit or 1. Eithe scena	ting Locatio perform othe er click Edit or ario's name.	n s r acti n a sc	ons on scenario lo enario (shown bel	cations from ow) or click	n the routin View Sce	ng st nari	rategy de os and th	tails: Ien a
							\$	
D	irect Ship				Ade	d Sce	nario	
L	liew Scenarios ast updated on	06/06	o/2024 by admin@ki	bocommerce.	com			
C	andidate sort s	trateg	y: Minimize Shipme	ents				
	Active							
0	Multiple assigSingle assign	gnmer ment	nts preferred preferred		$\mathbf{\Lambda}$			
S	Scenarios							
	Warehouse	S					Edit	
	🕜 Group 1						Edit	
	Group 2						Edit	
2. Selec	t at least one	locat	tion using the che	ckbox in the	table.			

	Ship					U AC	Id Locations
War	ehouses						Z
● ● A ② (Sort b	Active Add/Remove Filt Create Filter by Distance	ter					
Match	located	Partial match		\mathbb{Z}^{*}	No match		ľ
Assign entire order to a location in this scenario		Split order by quantity, assign quantities without inventory to Backorder		Split order by quantity, assign quantities without inventory to Customer Care			
scenari	10						
scenari							
scenari	Edit location a	2 selected					
scenari	Edit location s Location Code	2 selected Name	Q	Postal Code Q	All Schedules	- Status	- Rank
Scenari	Edit location s Location Code Q WH1	2 selected Name Mead Store	Q	Postal Code Q 78664-4074	All Schedules Available	- Status Active	• Rank

3. Expand the **Edit locations** dropdown and select the action you want to perform on the selected location(s). A common use of this is to place a location on hold (and then remove it from the hold). This will temporarily prevent any shipments from being assigned to that location, without fully deactivating the location.

Edit locations	2 selected			
Place hold		Q	Name	Q
Ungroup Unlink Link			Mead Store	
5			Great Falls DC	

New Order Routing UI

In the new UI, scenarios are independently associated with each strategy and added directly to that strategy.

Configure a Scenario

To begin configuring a new scenario:

- 1. Go to the List Strategies page.
- 2. Click the Edit icon on a strategy in the table.
- 3. Scroll down to the Scenarios section and click **Add Scenario**.

There are four steps in the scenario creation flow, detailed below.

Add Scenario

In Step 1, set the scenario's basic configurations.

- 1. Enter the scenario's Name.
- 2. Enter an optional **Description**.

1 2 -	 3	- 4
Name *		
Example Scenario		
Description		
Enter scenario description		
		/
Scenario Type		
Type of Scenario *		
DIRECTSHIP		
Sort Criteria		
Primary Sort		
Distance		 •
Secondary Sort		
Rank		-
A del anno 1 a chtan an Anno Ata Illia Anno an air 🔿		
Add new locations automatically to scenario		

- 3. Configure the primary and secondary sorting options to determine how to prioritize locations within a scenario. In the event of a tie using the primary sort, the secondary sort will determine which location is preferred.
 - **Rank:** Allows manually prioritized locations by numeric rank.
 - **Distance:** Prioritizes locations closest to the shipping address.

- Velocity: Based on maximum LTD (Life to Date) inventory values of the order items at each location candidate. Prioritizes locations with lower values to improve product turn and reduce markdowns by assigning orders to locations with the slowest moving inventory.
- Carrier Cost: Queries FedEx to get the actual shipping cost and prioritize locations with the lowest costs. Note that this does not calculate based on the rates of any other carriers.
- **Load Balanced:** Distributes order assignments evenly among locations.
- **Highest Available Inventory**: Aggregates available inventory across all requested items and prioritizes the location with the highest inventory count.
- Lowest Available Inventory: Aggregates available inventory across all requested items and prioritizes the location with the lowest inventory count. This is best used with Reverse Logistics routes, as it allows you to restock items at the locations that need it the most.
- 4. Indicate whether you want to Automatically add all active locations to Scenario or not using the checkbox. If enabled, all locations that are active in the Admin UI will be applied to this scenario (including any new locations created going forward) and you will not be able to manually add or remove specific locations.
- 5. Click Next.

Select Locations

In Step 2, add active fulfillment locations to the scenario to indicate where shipments in this scenario can be assigned. If you enabled **Automatically add all active locations to Scenario** in the previous step, you will not be able to add any further locations here and can immediately progress to Step 3 instead. For more details about managing routing locations, see the Locations guide.

1. Select locations from the list by clicking their checkboxes. Use the search bar in the top right to quickly find specific locations if needed.

0 —		2			3		
							Search by name, code, zipcode
	LOCATION CODE	LOCATION NAME	LOCATION TYPES -	ZIP CODE	FULFILLMENT CAPACITY		
	WarehouseLocationCode001	WarehouseLocationName001	WarehouseLocationTypeName001	78752	Limit Fulfillment to N/A	Shipments Per	r
	WarehouseLocationCode002	WarehouseLocationName002	WarehouseLocationTypeName001	78752	Limit Fulfillment to N/A	Shipments Per	
	WarehouseLocationCode003	WarehouseLocationName003	WarehouseLocationTypeName001	75201	Limit Fulfillment to N/A	Shipments Per	r
	WarehouseLocationCodeINV001	WarehouseLocationNamelNV001	WarehouseLocationTypeNameINV	75201	Limit Fulfillment to N/A	Shipments Per	,
	WarehouseLocation_1102202032	WarehouseLocation_110220203216_4	WarehouseLocationCodeName_11	78257	Limit Fulfillment to N/A	Shipments Per	·
	WarehouseLocation_1102202032	WarehouseLocation_110220203216_2	WarehouseLocationCodeName_11	78257	Limit Fulfillment to N/A	Shipments Per	,
	WarehouseLocation_1102202032	WarehouseLocation_110220203216_3	WarehouseLocationCodeName_11	78257	Limit Fulfillment to N/A	Shipments Per	·
	WarehouseLocation_1102202032	WarehouseLocation_110220203222_7	WarehouseLocationCodeName_11	78257	Limit Fulfillment to N/A	Shipments Per	,
IC I	1 2 3 4 5 > >I						1 of 5 pages (49 ite

2. Click Next.

While creating a new scenario, you can only add locations to it. Once created, you can manage its locations and assign rankings to them by editing the scenario.

Filter Criteria

In Step 3, fine-tune routing by filtering available locations according to logical conditions. If no filters are desired, just click **Continue**. For more details about filter logic, see the Filters guide.

- 1. Enter a **Filter Name**.
- 2. Select the **Filter Type**. This is the type of data that the filter will be based off of, such as a custom value or existing data point.
- 3. Select the **Attribute**. This is the property that will determine whether the order should be assigned to a scenario with this filter.

Filter Criteria		3		(4)
Example Filter	alue	less than or equal to	0 🗸 💌	
Add Condition				
In English If No conditions set. attempt assignment				

Cancel Next

- 4. 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.
- 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.
- 6. Click **Add Condition**. This will display the filter in a new table, allowing you to create additional filters as needed.
- 7. Click Next.

Split Shipment Behavior

In Step 4, configure the scenario's after-actions. For more information about after-action behavior and what these options mean, see the After-Action Logic section of this guide.

- 1. Select the preferred behavior that Order Routing should take in the event of only finding partial inventory for an order available in this scenario.
- 2. Select the behavior that Order Routing should take if there is no available inventory for an order in this scenario.
- 3. Click Save.

This will complete the scenario creation and add the scenario to the strategy details page.

Manage Existing Scenarios

Once a scenario has been created, you can edit its configurations again at any point by clicking the **Edit** icon from the strategy details page. You can also remove existing scenarios using the **Delete** icon, and reorder their rankings with the arrow icons.



After-Action Logic

When a scenario is being considered for assignment, order routing considers the locations within

the scenario, the available inventory in each of those locations, and any filters set in the scenario. Then it will determine whether the scenario is a match (can fulfill entire shipment), a partial match (can fulfill some of the items), or no match (cannot fulfill any items). If a full match is found, the shipment will be fully assigned within that scenario. This cannot be reconfigured.

In the event of a partial match, in which some inventory is available within the scenario but not the entire shipment, the most common behavior is splitting the shipment. If you don't want to split shipments, you can choose to try the next scenario, cancel the entire order, assign the entire order to Customer Care, or assign the entire order to Backorder instead.

Split Shipment Behavior

Partial Match

Shipments can be split based on line item or quantity by assigning available items to a location, and the remaining quantity either assigned to another location, cancelled, sent to Customer Care, or sent to Backorder. If split by line item, the entire quantity of a line item will always be assigned to another location. Splitting by quantity would allow some inventory of one line item to be assigned to one location.

The following screenshot is from the new UI, but is very similar to the Classic version.

ry next scenario (default)	Í
plit by line item, assign if all items can be fulfilled	
plit by line item, cancel items without inventory	
olit by quantity, assign if all items can be fulfilled	
olit by quantity, cancel quantities without inventory	
ancel all items	
ssign all items to Customer Care (CC)	
plit by line item, assign items without inventory to Customer Care	

If a shipment will be split, then an additional setting for **Restart attempt for partial assignment** will appear. This determines where Order Routing will attempt to assign the remaining items. These options are:

- **Start Over at Beginning:** Go back to the highest priority scenario and try to assign the remaining items to a location in that scenario.
- **Current Scenario:** Try to assign the remaining items to any location within the current scenario that the split occurred in. If no location can fulfill the items, then move on to the

next scenario.

• Scenario Rank: Try to assign the items to locations in the next scenario of the ranking order.

The following screenshot is from the new UI, but is very similar to the Classic version.

Partial Match

Split by line item, assign if all items can be fulfilled

Restart attempt for partial assignment





Current Rank

Kibo Engineering can configure a limit that specifies the allowed number of order splits in the back-end. Contact Engineering or if you would like to enable this.

Ship-to-Home and Delivery Consolidation

If you have locations enabled for STH or Delivery Consolidation, then specific logic determines how to consolidate shipments:

- If a full match is not available, Order Routing will check whether any of the suggested routing locations are enabled for consolidation as a partial match. If so, then it will assign the parent shipment to the first consolidation location it finds instead of performing the usual afteraction (such as splitting). It will then create transfers to fulfill all of the missing items from transfer-enabled locations. Thus, one single shipment will be sent to the customer from the consolidated location.
- If no locations have consolidation enabled, or there are not locations enabled to provide transfers, then it will proceed with the standard process of splitting the shipment.
- If an item is unavailable or on backorder, then a separate shipment will be created and reassigned for future delivery so that it does not block the available items from being

consolidated and shipped. Likewise, any items that can't be successfully routed or is rejected from the parent location will follow the configured after-action logic such as being canceled or sent to Customer Care as a separate shipment.

When a shipment is being consolidated at a single location, it cannot be manually reassigned. If using Multiple Location Consolidation, you must create a filter that compares location relationships based on an extensible attribute and apply it to your transfer scenario(s). In this case, shipment reassignment will be allowed since consolidation can occur at more than one location.