

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). This determines whether substitutions are allowed on their order or require fulfillers to contact them first, as well as the substitute item that is prioritized during automatic substitution.



Preference Behavior


The substitution process will take the shopper's preferences into account:

- 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.

Select Preferences in Offline Orders

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
<i>No order items to display</i>			
			Black Tshirt
			<i>Allow Substitution</i> 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 selections. 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,
  "substitutionInfo": {
    "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.