

Substitutions in Fulfiller UI

If the [Substitutions feature](#) is configured and a product is unavailable after an order has been placed, fulfillers can substitute a similar product during the fulfillment process.

View Pre-Fulfillment Substitutions

If a substitution was already performed on the shipment, (as either an automatic substitution or from the Admin UI), then the original line item and the substitute will be displayed in separate tables on the Fulfiller UI's shipment details.

Shipment #174: Assigned to **Warehouse 1**
 Order #160
 Status: **READY**

Placed	Assigned to Your Store	Accepted by Your Store	Picked Up
11/28/2024, 4:46:08 AM GMT-5	11/28/2024, 4:46:09 AM GMT-5	11/28/2024, 7:26:17 AM GMT-5	-

Image	Product	Product Identifiers	Return Status	Quantity	Price Paid	Discount	Item Adjustment	Subtotal
Image not available	MainProduct10	UPC : MainProduct10 Part Number : MainProduct10 Product Code : MainProduct10	Item can not be returned	10	USD \$10.00	USD \$0.00	-	USD \$100.00

Substitutes

Product	Substitute	Substitute Identifiers	Return Status	Substitute Quantity	Price Paid	Discount	Item Adjustment	Subtotal
MainProduct10	SubProduct	UPC : RBED Part Number : MainProduct10 Product Code : RBED	Item can not be returned	5	USD \$10.00	USD \$0.00	-	USD \$50.00

This distinct line item will continue to be reflected in fulfillment steps such as Validate Stock, where you can update the item's In Stock quantity and remove the substitute if needed.

2 Validate Stock

Select quantity to fulfill from stock

Image	Product	Product Identifiers	Quantity	In Stock
Image not available	MainProduct10	UPC : MainProduct10 Product Code : MainProduct10	1	<input type="text" value="0"/>

Substitutes

Product	Substitute	Substitute Identifiers	Substitute Quantity	Remove Substitution
MainProduct10	SubProduct Auto substitute For : MainProduct10	UPC : RBED Product Code : RBED	1	<input type="button" value="Remove"/>

If the substitute product was a bundle, each component product and their quantities will be displayed underneath the bundle name. Components cannot be removed individually.

Product	Substitute	Substitute Identifiers	Substitute Quantity	Remove Substitution
Cheese	Product Name: BundledProduct			
	BundleComponent01	UPC : BPC01 Product Code : BPC01	1	
	BundleComponent02	UPC : BPC02 Product Code : BPC02	1	

Perform a Manual Substitution

When an STH, BOPIS, or Delivery (not Assembly, Curbside) shipment item is eligible for substitution, the option to perform a manual substitution will be available during the Validate Stock step. To be eligible, substitutions must be configured for the product and the shopper must not have [opted out of substitutions](#) while placing their order.






Manual substitutions will not be available if an automatic or Admin UI substitution has already occurred for that item. However, you can still validate stock, reject, or reassign it just like any other line item.


- 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 Validate Stock

Select quantity to fulfill from stock


Image	Product	Product Identifiers	Quantity	In Stock
	Cheese Goat	UPC : CH02 Product Code : CH02	5	3 
	Cheese Cheddar	UPC : CH03 Product Code : CH03	5	5


Do you have all of these items ready for the customer?



- Eligible substitutes and their available inventory at the fulfillment location will be displayed. If the shopper [selected a preferred substitute product while placing the order](#), then their selection will be the only option displayed.

Substitute Item(s) in stock



Reason	Image	Product	Product Identifiers	Price	Inventory Available	Substitute Quantity
Damaged Or Defective Item		CH01	UPC : CH01 Product Code : CH01	7	2876	2



- Enter a **Reason** for the substitution and the **Substitute Quantity** of each product you want to substitute with. If the product is a bundle, it will appear as one line item containing all components (such as the example shown in the previous section).
- Click **Confirm**.
- 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.

2 Validate Stock

Select quantity to fulfill from stock

Image	Product	Product Identifiers	Quantity	In Stock
	Cheese Goat	UPC: CH02 Product Code: CH02	5	3 <input type="text"/>
	Cheese Cheddar	UPC: CH03 Product Code: CH03	5	5 <input type="text"/>

Substitutes

Product	Substitute	Substitute Identifiers	Substitute Quantity	Remove Substitution
Cheese Goat	Cheese	UPC: CH01 Product Code: CH01	2	<input type="button" value="Remove"/>



Do you have all of these items ready for the customer?

6. 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.

Shipment Details Customer Information Shipment History Shipment Notes Internal Order Notes

Shipment Details

Image	Product	Product Identifiers	Quantity	Unit Price	Discount	Subtotal
	Cheese Goat	UPC: CH02 Product Code: CH02	1	USD \$5.99	USD \$0.00	USD \$5.99
	Cheese Cheddar	UPC: CH03 Product Code: CH03	1	USD \$5.99	USD \$0.00	USD \$5.99

Substitutes

Product	Substitute	Substitute Identifiers	Substitute Quantity	Unit Price	Discount	Subtotal
Cheese Goat	Cheese Goat	UPC: CH02 Product Code: CH02	1	USD \$5.99	USD \$0.00	USD \$5.99
Cheese Goat	Cheese Goat	UPC: CH03 Product Code: CH03	1	USD \$5.99	USD \$0.00	USD \$5.99
Cheese Cheddar	Cheese Cheddar	UPC: CH03 Product Code: CH03	1	USD \$5.99	USD \$0.00	USD \$5.99
Subtotal						USD \$59.90
Adjustment						(USD \$0.00)
Shipping and Handling						USD \$0.00
Tax						USD \$0.00
Total						USD \$59.90

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.

Create Return
✕

Select Items	Product	Shipped By	Quantity Shipped	Quantity to Return	Reason
<input type="checkbox"/>	Cheese - Substitutable UPC: CH05	Belethor's General Goods	4		▼
<input type="checkbox"/>	CH06 - Substitutable UPC: CH06	Belethor's General Goods	3		▼
<input checked="" type="checkbox"/>	Cheese UPC: CH01 <small>Substitute for: Cheese - Substitutable</small>	Belethor's General Goods	1	1	Different Expectations ✕ ▼
<input checked="" type="checkbox"/>	Cheese Goat UPC: CH02 <small>Substitute for: CH06 - Substitutable</small>	Belethor's General Goods	2	2	Different Expectations ✕ ▼

Return Location: Belethor's General Goods ✕ ▼