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.

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.

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.

Substitutes

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

Perform a Manual Substitution

When an STH, BOPIS, or Delivery (not Assembly or 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.

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. If the shopper selected a preferred substitute product while placing the order, then their selection will be the only option displayed.

3. 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).

4. Click **Confirm**.

5. 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.

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

Substitutes

Product	Substitute	Substitute Identifiers	Substitute Quantity	Remove Substitution
Cheese Goat	Cheese	UPC : CH01 Product Code : CH01	2	Remove

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

Proceed

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
☐	Cheese - Substitutable UPC: CH05	Belethor's General Goods	4		▼
☐	CH06 - Substitutable UPC: CH06	Belethor's General Goods	3		▼
☑	Cheese UPC: CH01 Substitute for: Cheese - Substitutable	Belethor's General Goods	1	1	Different Expectations ✕ ▼
☑	Cheese Goat UPC: CH02 Substitute for: CH06 - Substitutable	Belethor's General Goods	2	2	Different Expectations ✕ ▼

Return Location: | Belethor's General Goods ✕ ▼ |

Cancel   Create Return For These Items