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.

Perform a Substitution

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.