

# Automate Order Fulfillment With Fulfillment Reports

Infusionsoft helps you streamline the order fulfillment process through the use of fulfillment reports. When an order is placed, Infusionsoft can automatically notify the person or company responsible for shipping the item(s). This person may be an internal team member who has user access to your Infusionsoft system, a third-party fulfillment company, or a combination of both. You are able to create multiple fulfillment reports - one for each fulfillment provider and the group of products they are responsible for shipping.

The fulfillment report displays the customer's contact information, shipping information, and the quantity and name of product(s) ordered. You are not able to control the fields displayed on the fulfillment report. The data is automatically populated based on order data.

Note: The fulfillment report triggers on the initial purchase and when a recurring subscription order autocharge is processed.

1. Go to **E-Commerce > Settings**
2. Click on **Fulfillment Reports** in the **settings** menu
3. Click on the **New Fulfillment Report** button to create a new report
  - o **Enter a Name.** The name is a way for you to easily identify what's going on

with this report at a glance. In most cases, you should use the name of the responsible fulfillment person or company.

- Select a fulfillment time frame from the drop-down:
  - **Immediately:** Select this option to ship the product immediately, regardless of the payment status.
  - **Invoice Paid Current:** Select this option to ship the product as long as the amount due has been paid, even if there are additional payments due as part of a payment plan.
  - **Invoice Paid Full:** Select this option to delay shipping until the entire invoice is paid in full (meaning the customer has paid all of the installments due as part of a payment plan.)

4. Click **Save** to reveal additional fields

5. Add Products to the report. Start typing a name of the product and it will appear in the drop-down. If you can't remember the name of the product, just tap the space bar on your keyboard. Repeat the process to add more products. Remember, only select products that this particular fulfillment provider is responsible for shipping.

6. Set up the Schedule. Select the **Schedule Type** you and your fulfillment provider have agreed upon.

- **Every X number of days:** Schedule the report to go every day or every few days (when there are more to ship) at a specific time of day.
- **On the same day(s) each week:** Schedule the report to go out on a specific day of the week at a specific time of day.
- **When there are X to process:** Schedule the report to go out when a specific number of items have been ordered. Make sure you add a top limit to the number of days to wait - you don't want customers waiting too long!

7. Set up the report Delivery options. Select a Delivery Method from the drop-down:

- **Manually Processed:** Choose to assign the shipping responsibility to one of your Infusionsoft users.
  - **Managed By:** Select the user in your Infusionsoft account that is responsible for shipping. This creates a Fulfillment job on their home page. They can also see the **Cancel** and **Resume** fulfillment links in the order record.
  - (Optional) **Approved By:** Select the user responsible for approving order fulfillment before it takes place. The job will show up for this user until it is approved, and then will be assigned to the user responsible for shipping.
- **An email will be sent with an attachment:** Choose this to send the shipping list to an outsourced fulfillment company.
  - Enter the outsourced fulfillment company email information in the

fields, including fulfillment instructions in the email body. This email should come from the person from your company who is responsible for overseeing fulfillment and responding to the provider's questions.

- **Managed By:** This person can also see the Cancel and Resume Fulfillment links in the order record.
- (Optional) **Approved By:** Select the user responsible for approving order fulfillment before it takes place. The job will show up for this user until it is approved, and then a notification will be sent to the outsourced fulfillment company to initiate the fulfillment process.

#### 8. Click **Save**

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