Set Up Third Party Fulfillment Notifications

Legacy Warning! While a Fulfillment Report automates fulfillment when an order is placed, fulfillment templates can be created as part of legacy automation and can also be imported into a campaign sequence in the campaign builder. If you plan on creating a fulfillment list for use in the campaign builder, it is better to set it up on the fly when creating the campaign. The procedures outlined below are typically only relevant to customers that utilize pre-campaign builder automation.

There are two types of fulfillment templates that you can create:

- **Fulfillment List** - An email with an attached spreadsheet (csv file) listing the contact information of those individuals who need something mailed to them. This is the most common type of fulfillment. The email with attachment is sent to a fulfillment company for processing.
- **Queued fulfillment List** - Instead of an email, this would simply be a "job" on an Infusionsoft user's dashboard. Only someone with an Infusionsoft user account would have access to this job.

Fulfillment List Templates

Choose this when you use a third-party fulfillment company to process the mailing. By "third-party" we mean anyone who does not have access to your Infusionsoft application, even if that person is your employee. The fulfillment list template sends the responsible party an email with the attachments needed to process the job. The attachments include a spreadsheet list of the contacts who are to receive the mailing and may also include a PDF, a Word document, or other files needed to process the job.

When you use a fulfillment list template, you will create a queue and control notification frequency through a follow-up sequence (legacy feature) schedule:

- **Daily** - Use the Global Follow-Up Sequence scheduling options to select the time of day (Eastern Standard Time) that you want ALL fulfillment list template to trigger. People will queue on the list until the specified time(s) of day. When the time arrives, the system sends the fulfillment list to the responsible party and begin queuing a new list.
- **Weekly or Monthly** - Use a combination of the Global Follow-Up Sequence

scheduling options AND the X Days After A Person is Added to This Follow-Up Sequence step scheduling option (with Rounding) to send the notifications on a specific day of the week (e.g. every Friday) or day of the month (e.g. 15th of the month). Note: If you need to send a list more than once a week or once a month, you will need to create a separate fulfillment list template for each day / date.

1. Go to **Marketing > Templates**
2. Select **Fulfillment List** as the template type
3. Enter a Title for the fulfillment list template. Note: The title is used to identify a fulfillment list template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    1. **Public**: Choose this to make the template accessible to other Infusionsoft users.
    2. **Private**: Choose this if you want to hide this template from other Infusionsoft users.
5. Enter the Fulfillment List Options.
    1. **Field List**: The fields listed on the left include all available standard and custom contact fields. The fields on the right are the fields to be included on the spreadsheet attached to the fulfillment job notification email. The fields on the right should include only the fields the responsible party needs to process the mailing. You can move the fields from one list to the other by clicking on the field name, and then using the arrow buttons to move the field to the left or right.
    2. **(Optional) Attachments**: Select or upload the additional attachments needed to process the mailing (e.g. cover letter.)
6. Enter the Processing Information.
    1. **Email Send To**: Enter or update the email address for the person responsible for completing this job.
    2. **Send to Contact's Owner**: Select Yes if you want to send internal notifications to contact owners when the job notification is sent.
    3. **Email Send From**: Enter the email address for the fulfillment supervisor from your company. This person should be able to answer the responsible party's questions about processing the job.
    4. **Email Subject**: Enter the subject line for the notification email. It is best practice to include your company's name or initials and a short job description (e.g. RDFP Mailing Job: New Customer Welcome Gift.)
    5. **Email Body**: Enter more detailed processing instructions telling the responsible party what to send, including any special requests (e.g. hand address.)
7. Click on the **Save** button to create the fulfillment list template.
8. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign the template to a category. The categories are used to organize and filter templates.

9. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and the labor needed to send the mailing to each person.
10. Mark the template as **Ready** and click on the **Save** button to apply the updates.

Queued Fulfillment Template

Choose this when one of your Infusionsoft users is responsible for processing the mailing. The queued fulfillment template will queue up a job on the Fulfillment Job widget you've added to the responsible user's home page. The system automatically queues records within one "job" until the responsible user begins processing it. When a job is "picked up" by a user, the system starts a new job queue for the newer records. You can still use the global follow-up sequence schedule and / or the follow-up sequence step schedule to control the frequency of job creation, however, the system will queue the records for each job automatically.

You will create a queued fulfillment template through the Marketing > Templates or "on the fly" as you add a step to a follow-up sequence (legacy feature) or send a broadcast.

1. Go to **Marketing > Templates**
2. Select **Queued Fulfillment List** as the template type.
3. Enter a Title for the queued fulfillment list template. Note: The title is used to identify a queued fulfillment list template in various lists throughout the system. It should be short and descriptive.
4. Choose a privacy option.
    1. **Public**: Choose this to make the email template accessible to other Infusionsoft users.
    2. **Private**: Choose this if you want to hide this email template from other Infusionsoft users.
5. Enter the Queued Fulfillment List Options.
    1. **Field List**: The fields listed on the left include all available standard and custom contact fields. The fields on the right are the fields to be included on the spreadsheet attached to the fulfillment job on the user's dashboard. The fields on the right should include only the fields the user needs to process the mailing. You can move the fields from one list to the other by clicking on the field name, and then using the arrow buttons to move the field to the left or right.
    2. **(Optional) Attachments**: Select or upload the additional attachments needed to process the mailing (e.g. cover letter.)
6. Enter the Processing Information

    1. **Assigned User**: Select the user who will be responsible for processing the mailing. This fulfillment job will show up in the fulfillment job widget on the user's dashboard.
    2. **Notify Subject**: Enter the subject line for the notification email (e.g. Mailing: Referral Request Postcards.)
    3. **Notify Body**: Enter more detailed processing instructions (e.g. use glossy postcards.)
7. Click on the **Save** button to create the queued fulfillment template.
8. (Optional) Click on the **Categories and Follow-Up Sequences** tab to assign this template to a category. The categories are used to organize and filter templates.
9. (Optional) Click on the **Misc. Expense** tab to assign a cost per person to this template. This cost can include both the materials and the labor needed to send the mailing to each person.
10. Mark the fulfillment template as **Ready** and click the **Save** button.