



InfusionSoft offers an e-mail marketing and sales platform for small businesses, including products to streamline the customer lifecycle, customer relationship management, marketing automation, lead capture, and e-commerce.

The API Integration allows you to connect to the NPFulfilment Logistics Platform -

- Pull orders from InfusionSoft client site
- Push tracking numbers back to InfusionSoft from NPFulfilment
- Push tracking URL back to InfusionSoft from NPFulfilment (Optional)
- Push the SOH (Stock on Hand) qty back to the client site
- Push the Available Stock on Hand qty (Optional)

Requirements from client in order to integrate with NPFulfilment Logistics Platform.

- Application Name
- API Key

What is Application Name

The API URL contains the name of the infusion soft application.

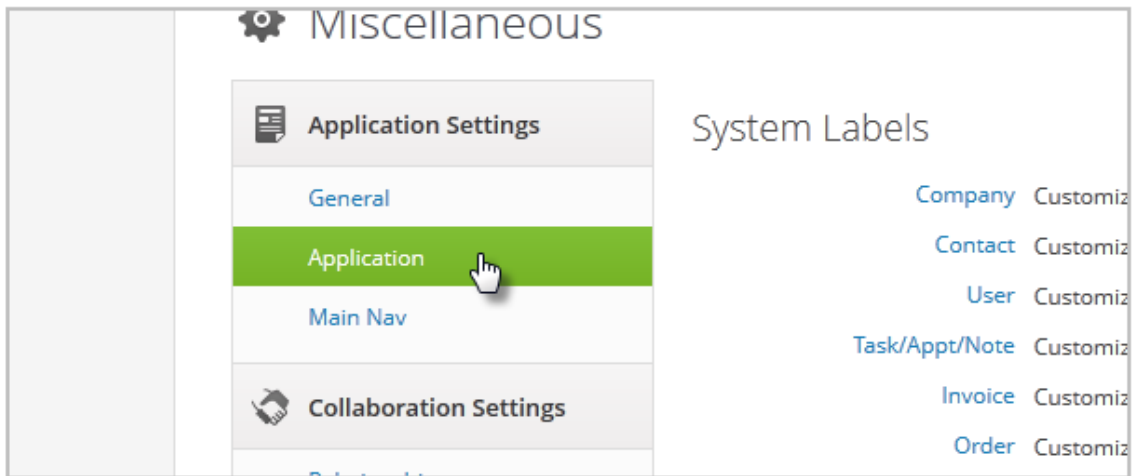
For example, the InfusionSoft URL is

<https://tf169.infusionsoft.com/login>

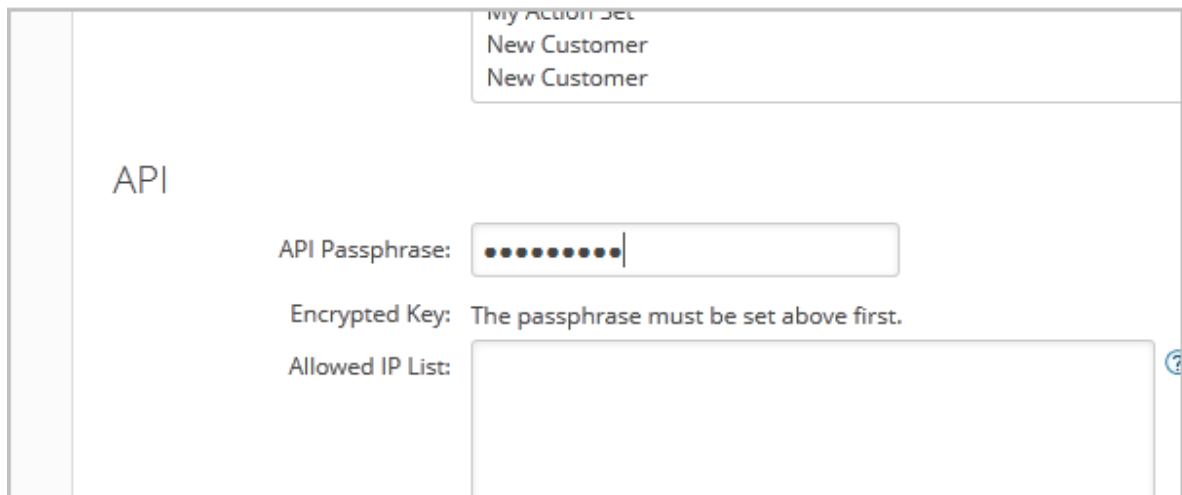
From the above URL the highlighted part is the name of the application.

To Get the API Key

1. Go to **Admin > Settings** in the master navigation.
2. Click on **Application** in the settings menu.



3. Scroll down to the **API** section and enter a pass phrase in the text box. The **API Pass phrase** is simply a password, or series of words that will be used to generate your unique API key. Please remember your **pass phrase** if you want to generate your API key again.



My Action Set
New Customer
New Customer

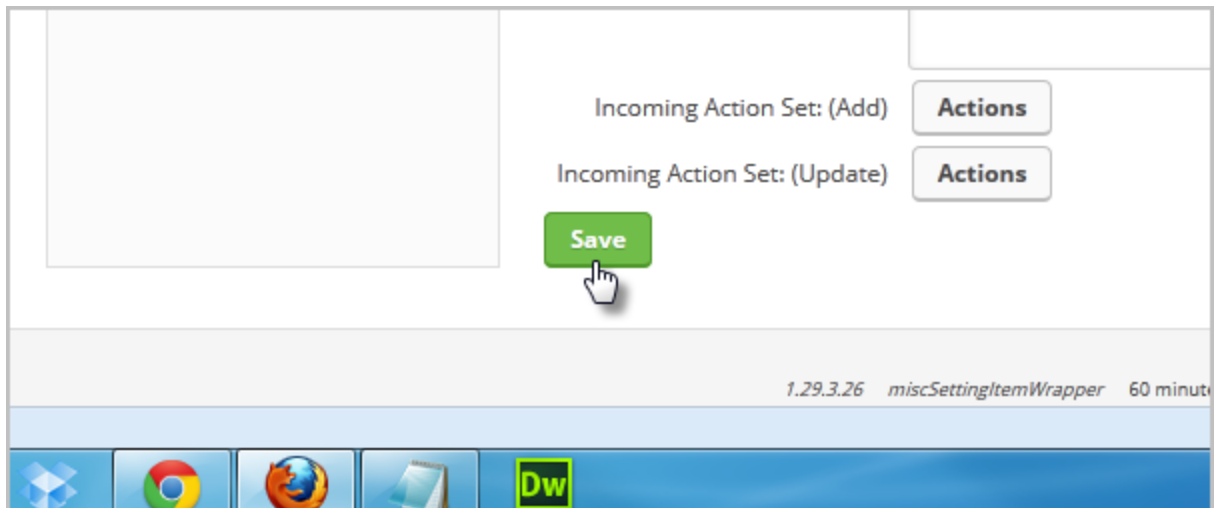
API

API Passphrase:

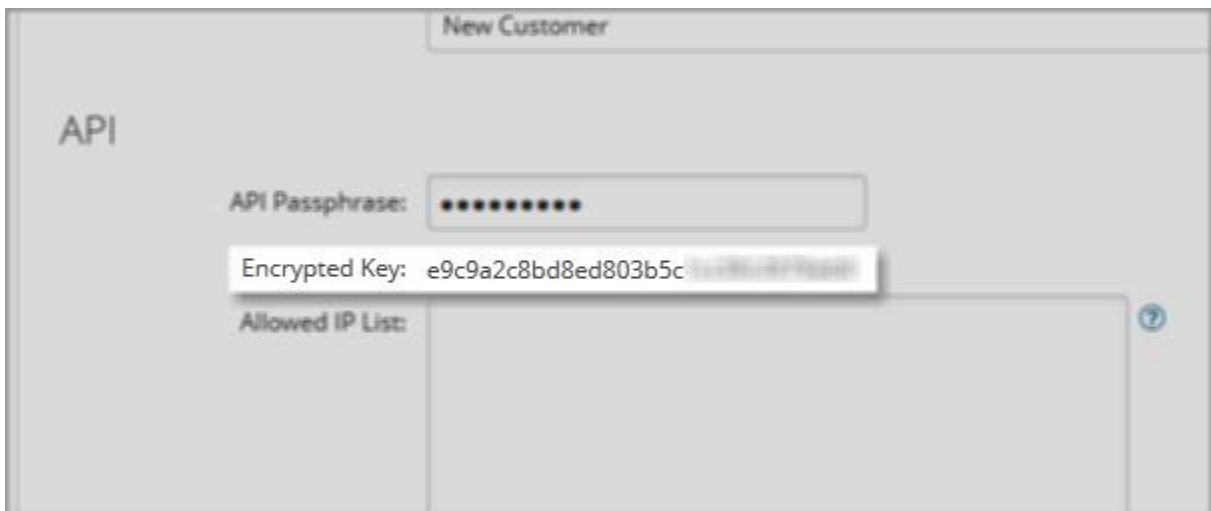
Encrypted Key: The passphrase must be set above first.

Allowed IP List:

1. After you enter a Pass phrase, click on the **Save** button to generate the API key.



2. This key is used in the API coding to authenticate the secure connection



These are the values that are used to connect to the client's shopping cart through API.

Order Filters that can be applied are as below:

Order Start Date: - This is the date that the client would like to start sending the live orders for shipment. This will start from 12AM on a particular date. We cannot apply a particular time to pull the orders; hence it is just the date that is captured.

Prefix of the order: - If the client wants to give any prefix with their order number then they can use this field. For example 1000012 is the order number and the client gives MG as the prefix in the master setting then the order will import like this MG1000012. This is useful if the client has more than one cart set up on InfusionSoft and would like to differentiate the orders from each cart.

Specific Countries: By defining specific countries in NP Fulfilment Logistics Platform, orders for these specific countries only will be imported.

Eg: If Australia and New Zealand are included in NP Fulfilment platform, orders with country as Australia and New Zealand only will be imported. Country name in the order file should be identical to the country name defined in NP Fulfilment platform.

Paid Status: In InfusionSoft we cannot get the orders using order status similar to other shopping carts, so we use the paid status of the order with filter date.

NP Fulfilment will pull orders from client's store in their specified paid status, for example if we set the paid status as "TRUE" only then paid orders will be pulled from the store.

Tracking No Update:

After the lodgement is finished, we update the tracking number back to client site in frequent intervals. Tracking number, carrier name and tracking URL will be updated along with the tracking number.

In InfusionSoft, we cannot update the tracking number directly. We need to create the **custom fields** to maintain the tracking information of the shipped orders.

We can create the custom fields in InfusionSoft shopping cart using the following steps.

To Create Custom Fields

1. Go to **Admin > Settings** in the master navigation.
2. Select a record type from the drop-down list and click on **Go**. This page displays a custom field summary. You can see the fields you have already created and add new custom fields.

⚙️ All Application Settings

Application Settings

General

Application

Main Nav

Custom Fields

Set up custom fields for: Order Go

Company Info

Company National Products Fulfilment Pty Ltd

3. Select Field from the drop-down and click on Add.

⚙️ Custom Fields for the Contact Record

Custom fields show up in their own tab(s) on the contact record, underneath a header. You can create up to 10 custom fields and can have as many tabs and headers as you would like. You currently have 7 custom contact fields.

Field ▼

Add

[View the field database](#)

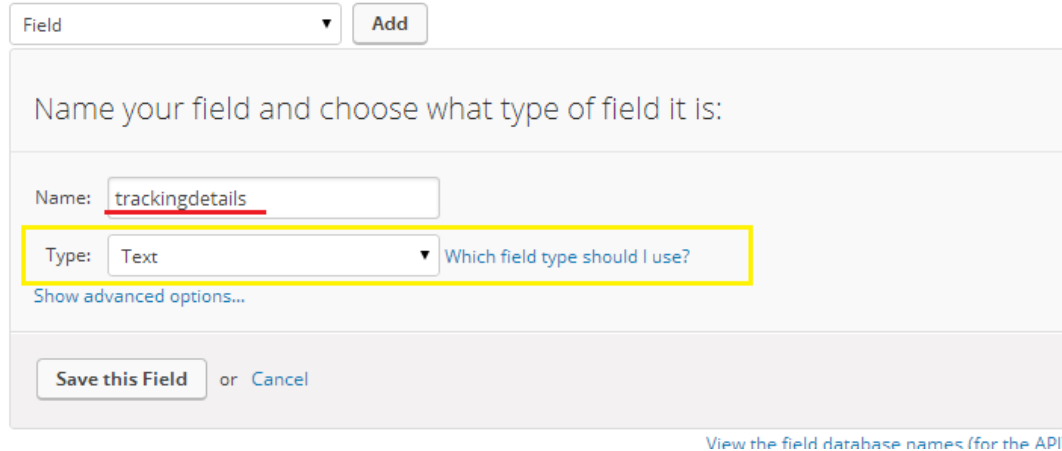
Tab: Custom Fields

Header: Custom Fields([Edit](#))

4. Enter the **Field Name**. This name is the field label displayed within an Infusion soft record. This is a "backend" field name to maintain the tracking information.

Custom Fields for the Order Record

Custom fields show up in their own tab(s) on the order record, underneath a header. You can create up to 100 custom fields and can have as many tabs and headers as you would like. You currently have 1 custom order fields.



The custom field must have the same name “**trackingdetails**”; if any other name is put then NPFulfilment will not consider that field as custom field to update the tracking details.

Stock Updates – NPFulfilment platform can push the stock levels to the client InfusionSoft cart. There are two options

- SOH Qty – This is the actual physical stock at the warehouse.
- Available SOH Qty – This is the qty that is retrieved after deducting the orders from the SOH/ Ready for Process stage/ Back orders if any

This happens once the orders are processed and Shipped on our end.

FAQ's

1. Where do we see the tracking numbers? - (ANS) - In infusion soft, you can view the tracking under the custom fields to maintain the tracking.
2. How do we set up the custom fields? (ANS) Step by step information as above.
3. What are the requirements for Integration? (ANS) Application Name ☐ API Key. The API URL contains the name of the infusion soft application. For Eg. The Infusion soft URL is <https://tf169.infusionsoft.com/login>. From the above URL the highlighted part is the name of the application.