

USER GUIDE

FULL SERVICE

FULFILLMENT USER GUIDE



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Table of Contents

Full Service Fulfillment	6
Full Service Fulfillment Workflow	6
Full Service Fulfillment Steps	7
Fulfillment Feature Defaults in Configuration Settings	9
Enable Fulfillment for the Project	12
Define Fulfillment Settings for the Project	13
Natural Insight Staff and Locations Contain Fulfillment Fields	15
Location Instructions Field Added to Locations	15
Important Notes about the Location Instructions Field and Location Maintenance	16
Shipping Notes Field Added to Staff Profile for Staff	17
Important Notes about the Shipping Notes Field and Staff Maintenance	18
Fulfillment Report	20
How to Access the Fulfillment Report	20
Fulfillment Report for One Project	21
Fulfillment Report Search Criteria	21
Fulfillment Report Search Results	24
Fulfillment Information	24
Assignment Information	24
Location Information Where the Assignment Will Take Place	25



Staff Information about the Staff Member Performing the Assignment	25
Fulfillment Report Columns	26
Fulfillment Report for Assignments Across More than One Project	30
Fulfillment Report Search Criteria	30
Fulfillment Report Search Results	33
Fulfillment Information	33
Assignment Information	33
Location Information Where the Assignment Will Take Place	33
Staff Information about the Staff Member Performing the Assignment	34
Fulfillment Report Columns	34
Fulfillment Info Web Service Overview	39
Description	39
Frequency	41
WSDL	41
Fulfillment Info Data Descriptions (Assignment Level)	48
Fulfillment Info Web Service Method	55
getFulfillment Parameters	55
Return Formats of the getFulfillment Method	56
Fulfillment Info Web Service API Summary	57
URL	57
WSDL	57



Methods57

 getFulfillment Method57

 getFulfillment Parameters 58

 getFulfillment Description 58

Edit Assignment Fulfillment Info Individually59

Edit Assignment Fulfillment Information in Bulk68

 Steps to Complete the Bulk Update Fulfillment Process70

Fulfillment Update Web Service Overview76

 Description76

 Frequency76

 WSDL 76

Fulfillment Update Web Service Data Descriptions 83

Fulfillment Update Web Service updateFulfillment Method 84

 Process for Calling the updateFulfillment Method 84

Fulfillment Update Web Service API Summary87

 URL87

 WSDL 87

 Method87

 updateFulfillment87

 updateFulfillment Parameters87

 updateFulfillment Description88



Potential Error Messages88

Staff Members Refer to Assignment Fulfillment Info89

Staff Member Accesses Fulfillment Tracking Number(s) and Carrier(s) on an Assignment by
Assignment Basis89

Staff Member Accesses Fulfillment Info via the Fulfillment Tracking Report93

Fulfillment Tracking Report Columns95



Full Service Fulfillment

These days it's not just about getting the right person to the right place at the right time for an assignment. You also may have materials such as displays, tasting ingredients, work supplies, etc. that need to be delivered to the right place at the right time as well. Experiential and event marketers know it's all about the planning so Natural Insight can help you expedite and track fulfillment (i.e. shipping) with **Full Service Fulfillment**. Using carriers such as Fedex and UPS, you can directly funnel in the package tracking number(s) of shipments associated with assignments via Natural Insight's **Fulfillment Web Service**. The result? Automated storage and communication of fulfillment tracking information!

Natural Insight not only can provide fulfillment information (such as tracking numbers and the carrier used to ship packages) per assignment for one project but it can also supply this information across multiple projects. We know you have staff members who work multiple assignments and visit multiple locations so we want to help you make your and their lives run more smoothly.

Natural Insight makes getting the right tracked materials to:

- » the right location and
- » the right person
- » at the right time

easier than ever.

Full Service Fulfillment Workflow

Natural Insight offers a full-circle **Full Service Fulfillment** workflow which is the reason behind the **Full Service Fulfillment** name. **Full Service Fulfillment** in Natural Insight is comprised of 6 steps with different players executing one or more steps.



Full Service Fulfillment Steps

1. An NI Administrator sets the default for the *Fulfillment Ship To* field in the *Project* folder of Configuration Settings.

See [Fulfillment Feature Defaults in Configuration Settings on page 9](#).

2. An NI Administrator enables **Full Service Fulfillment** for either a new or existing project by checking the *Enable Fulfillment* checkbox within the *Fulfillment* section on the **Project Maintenance** page.

See [Enable Fulfillment for the Project on page 12](#).

3. An NI Administrator ensures valid fulfillment data is populated for staff members (**Staff Profile**) and locations.

See [Natural Insight Staff and Locations Contain Fulfillment Fields on page 15](#).

4. An NI Administrator or manager views the **Fulfillment Report** to display assignments based upon desired search criteria. The **Fulfillment Report** can be run:

- » locally for a single project (This version of the **Fulfillment Report** and/or export is accessible via the project's **Project Dashboard**.)

See [Fulfillment Report for One Project on page 21](#).

- » locally across one or more projects (This version of the **Fulfillment Report** and/or export is accessible via **PROJECTS > Fulfillment**.)

See [Fulfillment Report for Assignments Across More than One Project on page 30](#).

- » remotely across one or more projects (This version of the **Fulfillment Report** and/or export is accessible via the **Fulfillment Info API**.)

See [Fulfillment Info Web Service Overview on page 39](#).



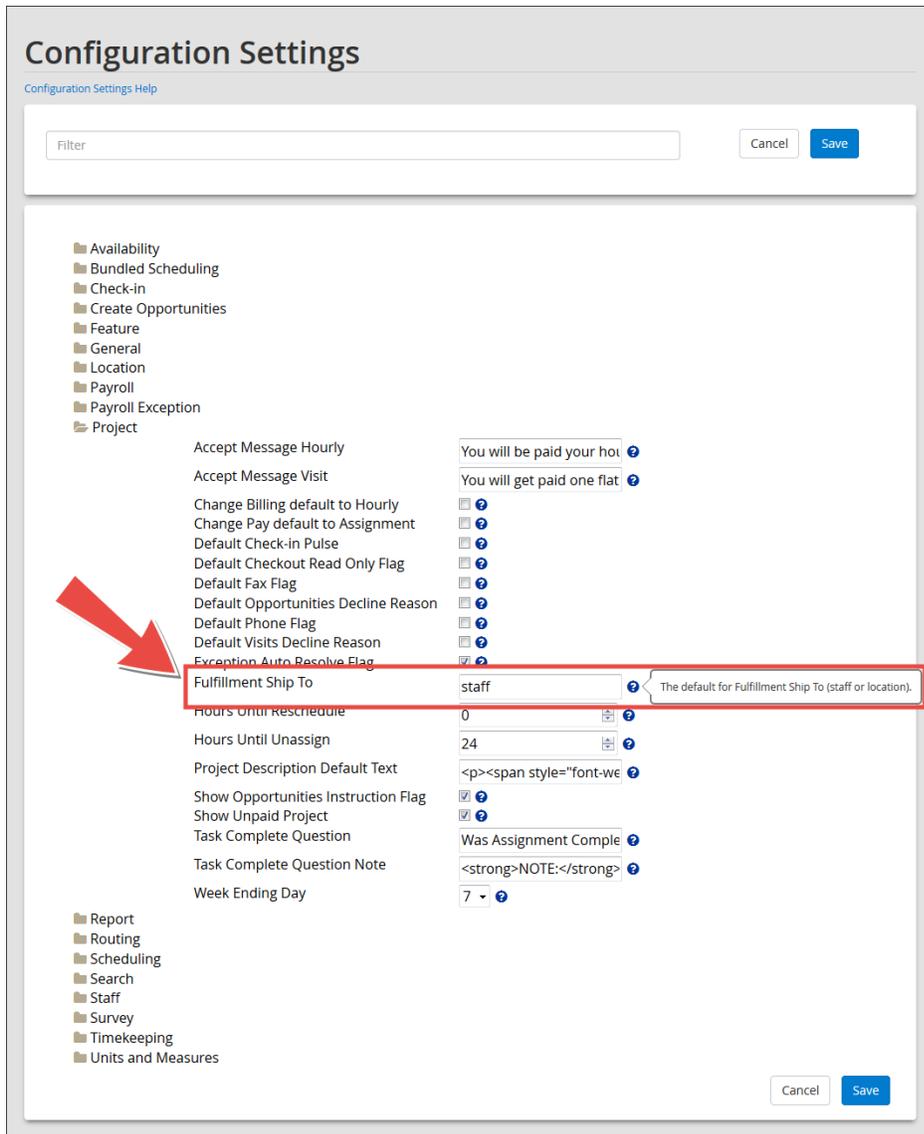
5. Fulfillment information is added (or edited) for assignments in one or more fulfillment-enabled projects in three possible methods:
 - A. On an assignment by assignment basis by NI Administrators or managers
See [Edit Assignment Fulfillment Info Individually on page 59](#).
 - B. As a bulk process by NI Administrators
See [Edit Assignment Fulfillment Information in Bulk on page 68](#).
 - C. Via the Fulfillment Update API for automated remote fulfillment data transfer to NI
See [Fulfillment Update Web Service Overview on page 76](#).

6. The staff member performing an assignment refers to fulfillment information - *Tracking Number(s)* and corresponding *Carrier* - for the assignment on the assignment's **Materials** page in the *Trackingpod*. In this way, the staff member can keep tabs on the shipment of assignment materials (including relevant tracking numbers and carrier information).
See [Staff Members Refer to Assignment Fulfillment Info on page 89](#).



Fulfillment Feature Defaults in Configuration Settings

An NI Administrator sets the default for the *Fulfillment Ship To* field in the *Project* folder of Configuration Settings.



The *Fulfillment Ship To* field indicates where shipments are shipped by default for a project - either to *staff* or *location*:

» *staff*

When the *staff* default is indicated in the *Fulfillment Ship To* field, shipments (of materials, displays, etc. for an assignment) will ship to the staff member scheduled to perform the assignment. Specifically, the shipment will be sent to the *Shipping Address* (stored in the staff member's **Staff Profile**) of the staff member scheduled to perform the assignment.

» *location*

When the *location* default is indicated in the *Fulfillment Ship To* field, shipments (of materials, displays, etc. for an assignment) will ship to the location of the assignment. Specifically, the shipment will be sent to the *Address* of the location of the assignment.

The *Fulfillment Ship To* field in **Configuration Settings** allows you to define the default *Fulfillment Ship To* behavior for your Natural Insight account. However, you have the ability to override the default on the project level (see Step 2).



IMPORTANT NOTES:

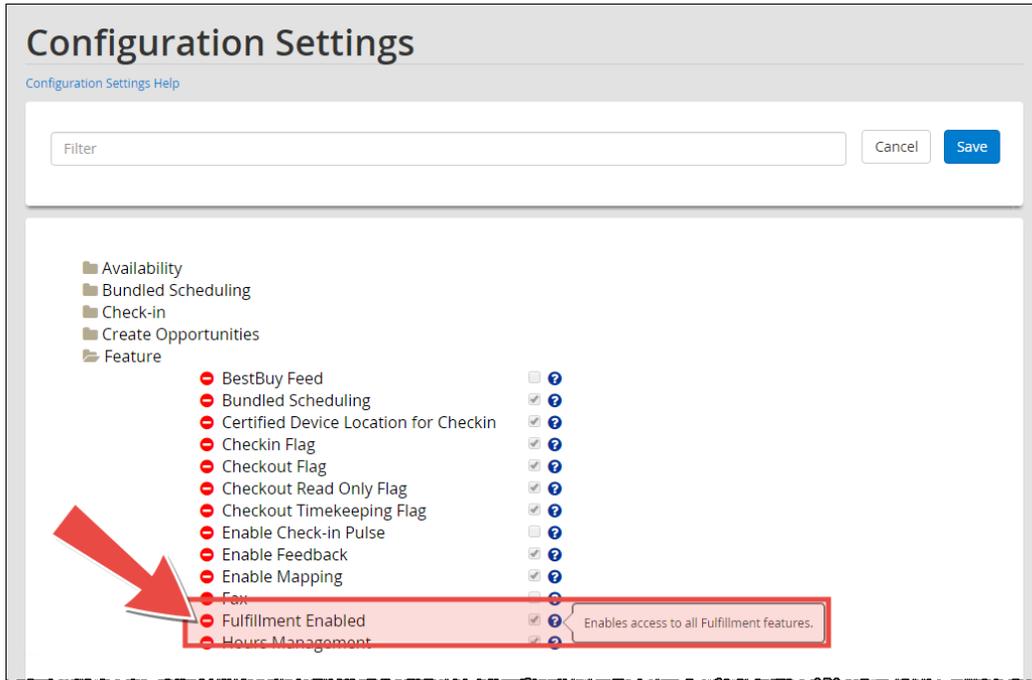
Full Service Fulfillment is turned on by default for all Natural Insight accounts when the feature is released.

Continued on the next page..





When you open the *Feature* folder in **Configuration Settings**, you will see the read-only *Fulfillment Enabled* checkbox checked when the feature is activated in your account.

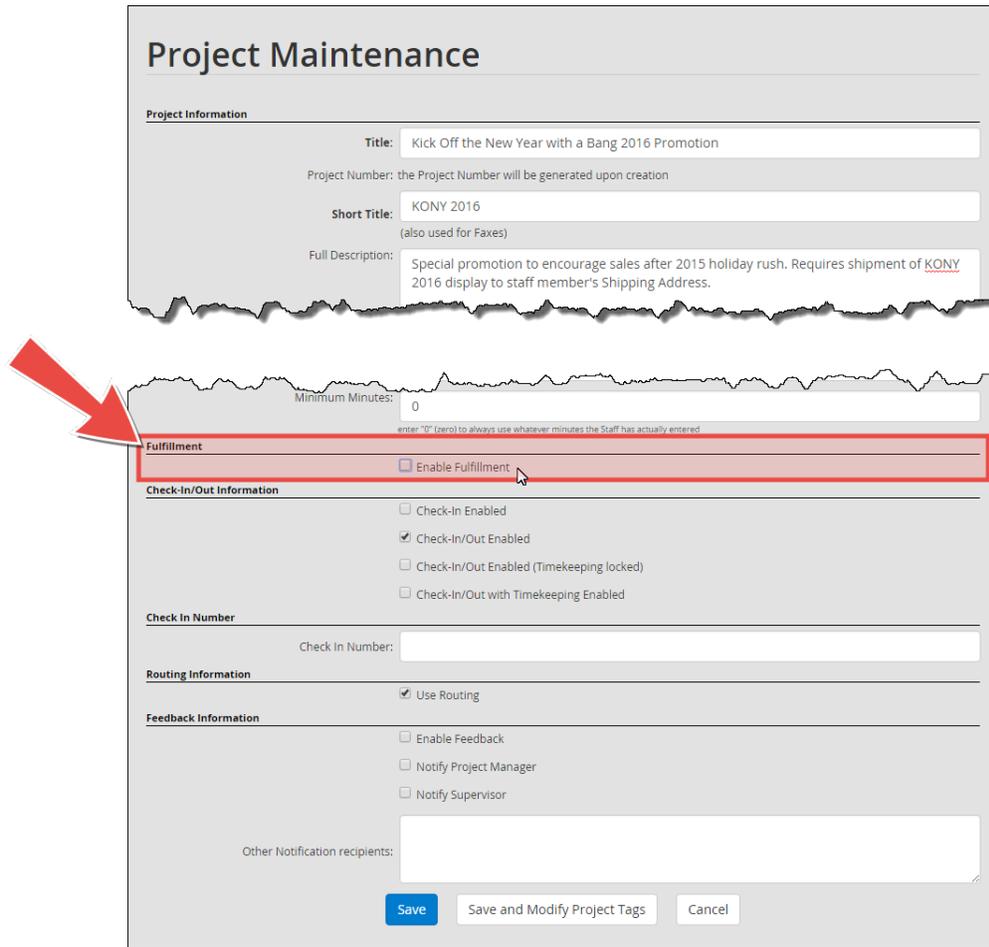


If you would like to turn off the **Full Service Fulfillment** feature in your Natural Insight instance, contact your Natural Insight Account Manager who can deactivate the feature.



Enable Fulfillment for the Project

An NI Administrator enables Full Service Fulfillment¹ for either a new or existing project by checking the *Enable Fulfillment* checkbox within the *Fulfillment* section on the Project Maintenance page.

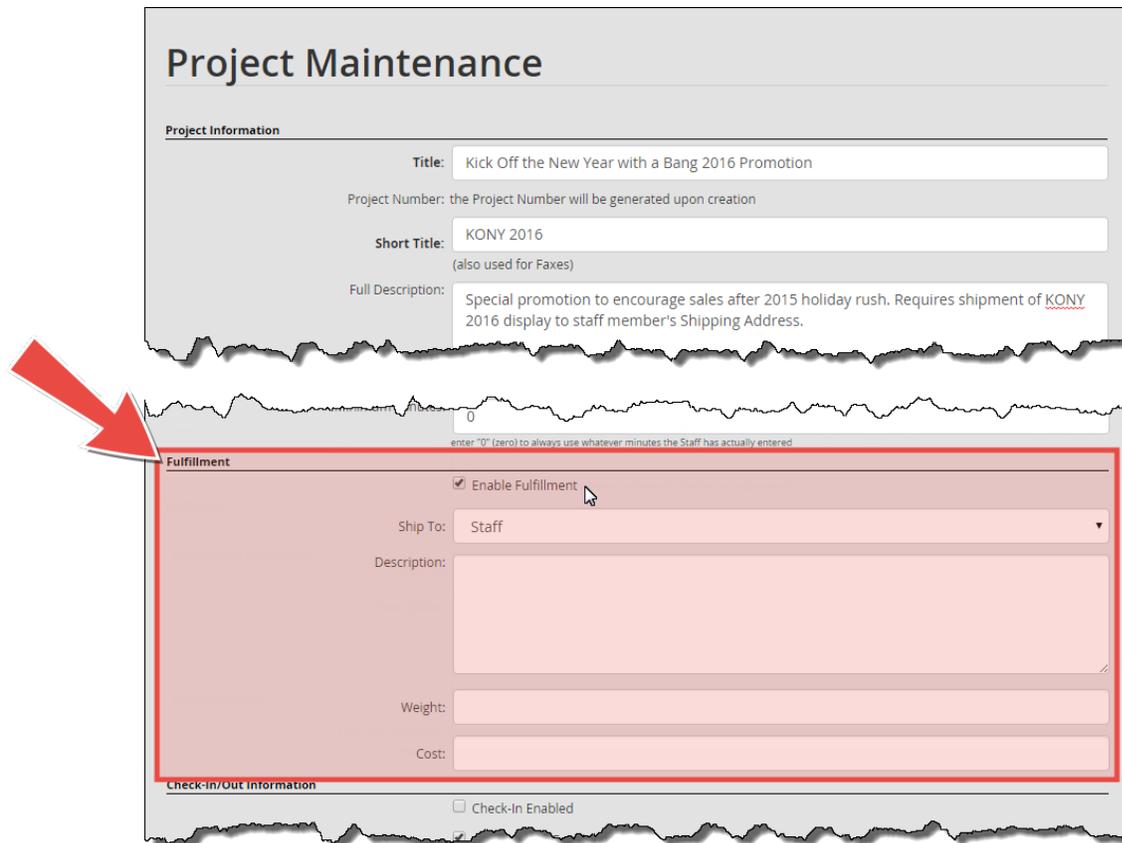


The screenshot displays the 'Project Maintenance' form. The 'Project Information' section includes fields for Title, Short Title, and Full Description. Below this is the 'Fulfillment' section, which is highlighted with a red box and a red arrow. The 'Enable Fulfillment' checkbox is checked. Other sections include 'Check-In/Out Information', 'Check In Number', 'Routing Information', and 'Feedback Information'. At the bottom, there are buttons for 'Save', 'Save and Modify Project Tags', and 'Cancel'.

¹If you are not familiar with the term fulfillment, it means shipment - fulfill (v.) = ship (v.); fulfilled = shipped. Frequently, assignments require materials such as displays, banners, tasting supplies, etc. These materials must be received by the staff member performing the work of the assignment prior to the starting work on the assignment. **Fulfillment** documents and tracks the shipment of these materials either to the staff member's Shipping Address or to the location where the assignment takes place.



Once the *Enable Fulfillment* checkbox is checked, more options dynamically appear below the checkbox.



The screenshot shows a 'Project Maintenance' form. The 'Project Information' section includes fields for Title, Short Title, and Full Description. Below this is the 'Fulfillment' section, which is highlighted with a red border and a red arrow pointing to the 'Enable Fulfillment' checkbox. The 'Fulfillment' section contains a 'Ship To' dropdown menu, a 'Description' text area, and 'Weight' and 'Cost' input fields. Below the 'Fulfillment' section is the 'Check-in/Out Information' section, which includes a 'Check-In Enabled' checkbox.

Define Fulfillment Settings for the Project

For the project, you can define the following default **Fulfillment** settings that will trickle down to any fulfillment associated with the assignments within the project:

1. *Ship To*

Ship To determines where the shipment(s) for this assignment will ship - either *staff* or *location*. The value of the *Ship To* field will inherit the value of the *Fulfillment Ship To* field from the *Project*



folder of your NI account's **Configuration Settings**. If you wish to change the *Fulfillment Ship To* value for this project, do so with the *Ship To* dropdown on the **Project Maintenance** page.

2. Description

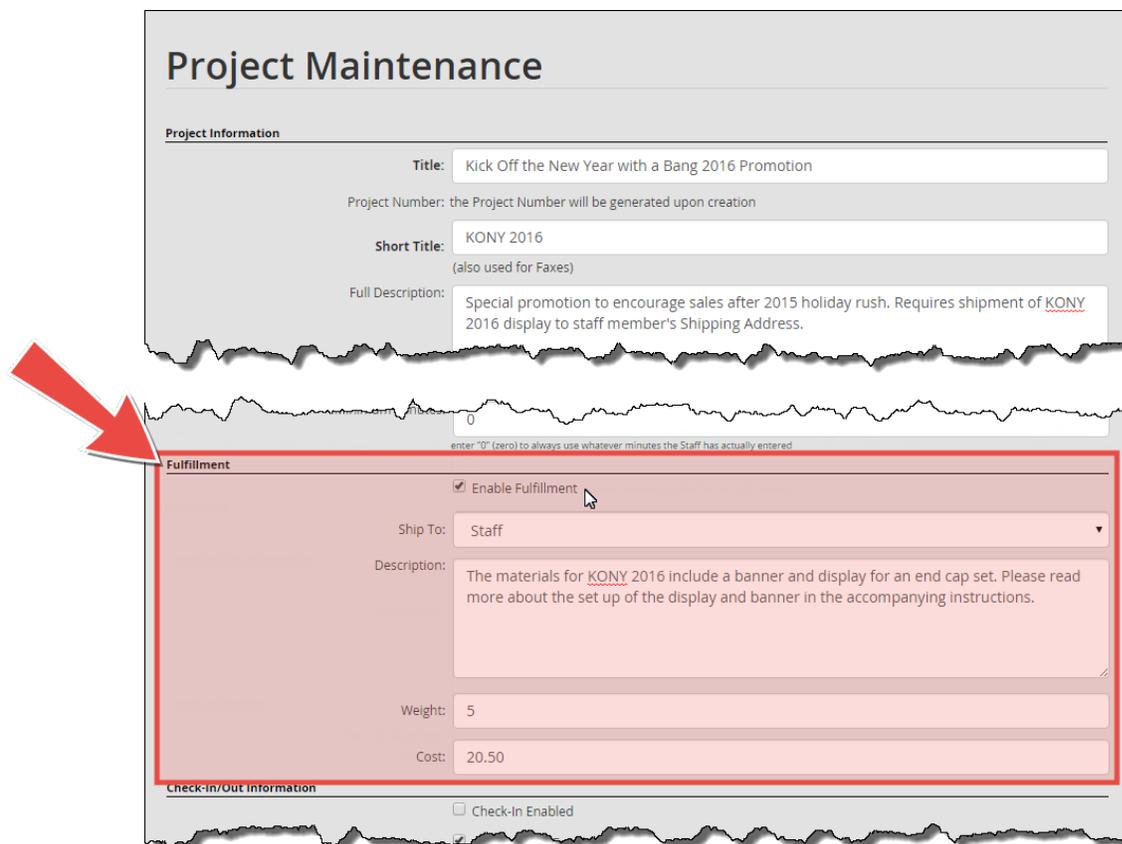
Description is a text description of the materials to be fulfilled/were fulfilled for the assignment.

3. Weight

Weight is the weight (as a decimal) of the fulfilled or to be fulfilled) materials for the assignment.

4. Cost

Cost is the cost (as a decimal) of the fulfilled (or to be fulfilled) materials for the assignment.



The screenshot displays the 'Project Maintenance' interface. The 'Project Information' section includes fields for Title, Short Title, and Full Description. Below this, the 'Fulfillment' section is highlighted with a red border and a red arrow. This section contains a checked 'Enable Fulfillment' checkbox, a 'Ship To' dropdown menu set to 'Staff', a 'Description' text area, and input fields for 'Weight' (5) and 'Cost' (20.50). At the bottom, the 'Check-in/Out Information' section has an unchecked 'Check-In Enabled' checkbox.

Click **Save** on the Project Maintenance page to save your settings.

Natural Insight Staff and Locations Contain Fulfillment Fields

Fulfillment info such as instructions for receiving shipments of materials can be stored in each staff member's **Staff Profile** as well as each location's record. NI Administrators should ensure that valid fulfillment information is populated in both individual staff member and location records if they are to use **Full Service Fulfillment** with either.

Location Instructions Field Added to Locations

When adding or editing a location in Natural Insight, the *Location Instructions* field is a handy place to display fulfillment or delivery information/instructions for packages, supplies, merchandise, etc. received at a location. The field can actually hold any information useful for a location.

To add information to the *Location Instructions* field, either add a new location or edit an existing location via the **Location Information Editor (PID=449)** and add text to the *Location Instructions* field.

The screenshot shows the 'Location Information Editor' interface. The form is divided into 'Basic' and 'Detailed' sections. The 'Basic' section contains fields for Location Name, Location ID, Location Address, City, State/Province, Postal Code, Location Number, Phone, Email, Latitude/Longitude, and Time Zone. The 'Location Instructions' field is highlighted with a red box and contains the text 'Please place deliveries in the back room and log them.'. A blue callout bubble points to this field with the text: 'The Location Instructions field is a handy place to specify delivery information for packages, supplies, merchandise, etc. for a location.' The 'Detailed' section includes fields for Description, Group Code, Source, Extra Effort Type, Extra Effort Amount, and maxStaff. At the bottom right, there are 'Save' and 'Cancel' buttons.



Once you click the **Save** button on the **Location Information Editor (PID=449)**, the **Location Dashboard** displays the *Location Instructions* for the location created or edited.

Location Dashboard

Location - Natural Insight Retail Store #400

ST400 [Edit] [PDF] [Excel]

Basic

Location Name:	Natural Insight Retail Store #400	Location Number:	400
Location ID:	ST400	Phone:	703-757-8284
Location Address:	5903 Bing Court	City:	Alexandria
State/ Province:	VA	Email:	silloyd@naturalinsight.com
Postal Code:	22310	Latitude / Longitude:	38.75071 / -77.138725
Country:	US	Time Zone:	America/New York
Location Instructions:	Please place deliveries in the back room and log them.		
Description:		Phone Readback:	
Group Code:		Status:	Active
Source:	client	Chain:	Base Parent Loc...
Extra Effort Type:	pctpay	Average Hourly Labor Cost:	
Extra Effort Amount:	0		

Detailed

maxStaff:

Map [Automatic] [Bird's eye] [Filter]

Upcoming Assignm [Filter] Assign... Project

Closest Staff Sho [Filter]

Important Notes about the *Location Instructions* Field and Location Maintenance

You can also add or modify locations in bulk, or add or modify even just one location, by building or editing respectively a **Location Maintenance Template**. When building a new template or modifying an existing template, if you wish to refer to one or more locations' *Location Instructions*, the field/-column is named *locationInstruction*. *locationInstruction* is also the attribute name of the <location> tag for API Location Maintenance operations. In either case, *locationInstruction* is varchar (text) with a 500 character max.

Shipping Notes Field Added to Staff Profile for Staff

When adding or editing a staff person in Natural Insight, the *Shipping Notes* field is a handy place to specify shipping or delivery information/instructions for packages, supplies, merchandise, etc. received at a staff person's *Shipping Address*.

To add information to the *Shipping Notes* field when you are either adding a new staff person or editing an existing staff person, type text into the *Shipping Notes* field.

The screenshot displays the 'Staff Profile' form for a staff member named Mary Sharp. The form is divided into several sections: Base Information, Pay Information, Staff Tags, Locations, Address, and Geocode Information. The 'Shipping Notes' field is highlighted with a red box and contains the text: 'Packages should be left in the lobby with the doorman to the apartment building.' A blue callout bubble points to this field with the text: 'The Shipping Notes field is a handy place to specify fulfillment or shipping information for a staff member.'

Staff Profile

Mary Sharp

Base Information

Status: Active
Staff Type: Merchandiser
Staff Number: 1080
Badge ID: 1080
Home Phone: 5174362803
Mobile Phone: 5174362801
Email Address: support@naturalinsight.com
Date of Birth: 01/14/2015
Hire Date:
Termination Date:
Supervisor: Supervisor, Demo
Third Party Staff: No
SSO Enabled: No

Pay Information

Job Code: 11.11
Pay Rate Code: 11.11
Pay Rate (\$): 11.11
Maximum Hours (week): 166.67
Maximum Hours (day): 24
Default: 28 hrs
Default: 8 hrs

Staff Tags

Certification\200 Class
Hair Color\Blonde
Language\Russian
Rating\Above Average
Skills\Demonstration (Excellent)
Skills\Franchise Assessment
Skills\Merchandiser
Skills\Mystery Shopper
Staff Team\North
Staff Type\Lead
Staff Types\Merch
Staff Team\Best Buy\test tag as best buy
Staff Team\East Teams\Team East 10

Notes

This person is better for retail and not bar events

Locations

Primary: 0027612 - 7 ELEVEN
Other: EPRS1000 - #245 ZALES, 0641749 - 360 Express Mart, 0081520 - Essence of Europe

Address

Home: 46040 Center Oak Plaza, Sterling, Virginia, 20166
Shipping: 467 Mary Lane S, Centreville, Virginia, 20120, US - United States

Shipping Notes

Packages should be left in the lobby with the doorman to the apartment building.

Geocode Information

Latitude / Longitude: 38.929794 / -77.409142
Geocode Status: Valid on 04/09/2015
Time Zone: Eastern Standard Time, New York



Once you click **Save**, the **Staff Profile** page displays the *Shipping Notes* for the added or edited staff person.

Staff Profile

Mary Sharp (staffmember)
Natural Insight

Base Information

Status	Active
Staff Type	Merchandiser
Staff Number	1080
Last Login Date	10/28/2015
Active Since	08/07/2006
Badge ID	1080
Home Phone	5174362803
Mobile Phone	5174362801
Email Address	support@naturalinsight.com
Date of Birth	01/14/2015
Hire Date	
Termination Date	
Last Updated	10/28/2015
Supervisor	Supervisor, Demo (support@naturalinsight.com, (800) 581-2141)
Third Party Staff	No

Pay Information

Job Code	11.11
Pay Rate Code	11.11
Pay Rate (\$)	11.11
Maximum Hours (week)	40
	Default: 28 hrs
Maximum Hours (day)	24
	Default: 8 hrs

Staff Tags

- Certification\200 Class
- Hair Color\Blonde
- Language\Russian
- Rating\Above Average
- Skills\Demonstration (Excellent)
- Skills\Franchise Assessment
- Skills\Merchandiser
- Skills\Mystery
- Staff Team\N
- Staff Type\Le
- Staff Types\B
- Staff Team\Ea

Visits

Past-Due	592
Future (accepted)	45
Unscheduled Work	190

Schedule

Past-Due	0
Future (accepted)	0

Locations

Primary	0027612 - 7 ELEVEN
Other	EPRS1000 - #245 ZALES, 0641749 - 360 Express Mart, 0081520 - Essence of Europe

Address

Home	46040 Center Oak Plaza Sterling, VA 20166 US
Shipping	467 Mary Lane S Centreville, VA 20120 US

Shipping Notes

Packages should be left in the lobby with the doorman to the apartment building.

Code Information

Latitude	39.029794 / -77.409142
Status	Geocoded on 04/09/2015 America/New_York

Notes

This person is bet

The *Shipping Notes* field is a handy place to display fulfillment or shipping information for a staff member.

Important Notes about the *Shipping Notes* Field and Staff Maintenance

You can also add or modify staff in bulk, or add or modify even just one staff person, by using a Staff Maintenance process - via either a tab-delimited data spreadsheet or XML data upload (STAFF > Staff Maintenance - Manual page). If you wish to refer to one or more staff persons' *Shipping Notes* via



spreadsheet, the field/column is named *Shipping Notes* and is located to the right of the *Shipping Country Code* column. *shipNotes* is how the field is referred to in API Staff Maintenance operations. In either case, *shipNotes/Shipping Notes* is varchar (text) with a 500 character max.

Please contact your Natural Insight Account Manager in order to discuss whether you would like *Shipping Notes* to display in **Staff Profiles** and for whom. In addition, decide with and communicate to your Natural Insight Account Manager who will have the security permissions to edit this field. When *Shipping Notes* is added to **Staff Profiles** and released to <http://my.naturalinsight.com>, *Shipping Notes* will **NOT** appear for staff persons unless you specifically request your Natural Insight Account Manager to activate its display.



Fulfillment Report

The **Fulfillment Report** provides fulfillment information per assignment. Each row in the *Search Results* pod represents an assignment. The **Fulfillment Report** can be accessed in two ways and, as such, has two slightly different versions.

How to Access the Fulfillment Report

You can access the **Fulfillment Report** either through

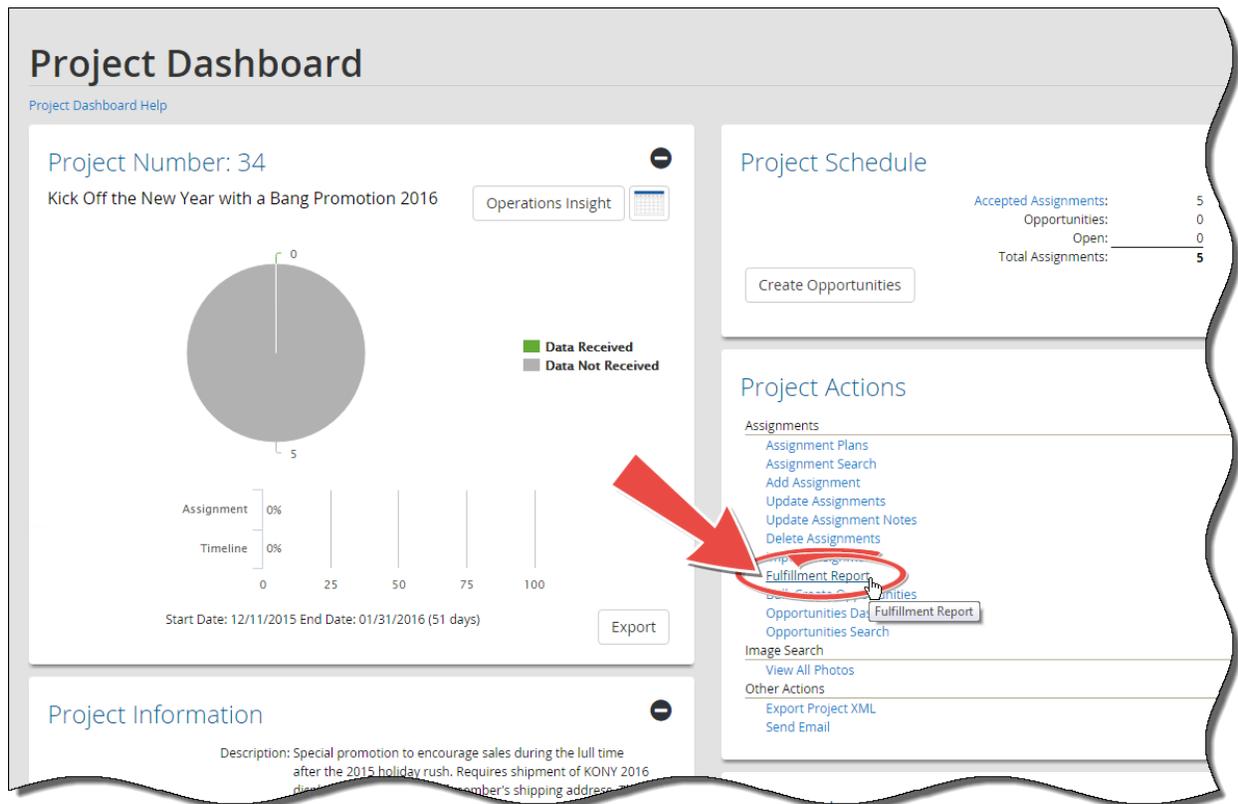
1. a project's **Project Dashboard** to see a project's assignments and their associated fulfillment information, or
2. the **PROJECTS** dropdown on the main menu and the **Fulfillment** option (**PROJECTS > Fulfillment**) to see assignments across multiple projects and the assignments' associated fulfillment information



Fulfillment Report for One Project

If you access the Fulfillment Report via a project's Project Dashboard, you view the report for assignments in the ONE project on whose Project Dashboard you are located.

Click the *Fulfillment Report* link within the *Project Actions* pod on the project's Project Dashboard to access the report.



Fulfillment Report Search Criteria

Upon clicking the *Fulfillment Report* link, the Fulfillment Report page loads to display the *Search Criteria* pod.

Since you emanated from a project's **Project Dashboard**, the read-only *Project* field will be pre-populated with that project.

Fulfillment Report

Jump to Project Dashboard

[Fulfillment Report Help](#)

Search Criteria

Date Accepted:

Through:

Shipped: Yes No All

Project:

Assignment ID:

Search Results

There are no results to display for that search criteria.

When you access the Fulfillment Report via a project's Project Dashboard, the project is already prepopulated in the *Project* field and it is read-only.

Use the *Search Criteria* to search for assignments (including their associated fulfillment data) in the project. The *Search Criteria* pod includes the following fields:

- a. a date range (optional) - *Date Accepted* (start date) - *Through* (end date)

You can enter a start date for the range in the *Date Accepted* field and the end date of the range in the *Through* field. An assignment will be returned in the search results if its *Accepted Date* falls within the date range provided.

- b. *Shipped* (pre-checked)

The *All* radio button is checked by default.

- » Yes - Returns assignments whose shipment(s) have been shipped in the project
- » No - Returns assignments whose shipment(s) have not been shipped in the project
- » All - Returns assignments with shipped shipment(s) as well as assignments with unshipped shipment(s) in the project

c. *Project* (read-only and pre-populated with the project from whose **Project Dashboard** you emanated)

If you enter no values in the *Search Criteria* pod except the default values of the prepopulated read-only *Project* field and the *All* radio button of the *Shipped* field, the *Search Results* pod will show all assignments within the project in the *Search Results* pod.

The screenshot displays the 'Fulfillment Report' interface. At the top, there is a 'Jump to Project Dashboard' button and a 'Fulfillment Report: Help' link. The 'Search Criteria' section includes:

- Date Accepted: mm/dd/yyyy
- Through: mm/dd/yyyy
- Shipped: Radio buttons for Yes, No, and All (All is selected).
- Project: A dropdown menu showing '34 - KONY 2016'.
- Assignment ID: An empty text input field.

 Below the search criteria are 'Search' and 'Clear Fields' buttons. The 'Search Results' section shows 'Search Results: 5' and includes 'Check All', 'Update', and 'Export' buttons. The results are presented in a table with the following data:

Edit	Shipped	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input type="checkbox"/>	275421	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3121	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3123	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275424	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3125	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275425	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3126	Base Parent Location	Base Parent Locati



d. *Assignment ID*(optional)

You can enter either one *Assignment ID* or a comma-delimited list of more than one *Assignment ID*. Search results will be limited to the assignments in the project whose *Assignment ID* you've entered.

Fulfillment Report Search Results

The generated **Fulfillment Report** provides data about each assignment, the location where the assignment will take place, the staff member scheduled to staff the assignment (including the staff member's shipping address and *Shipping Notes*) and **Fulfillment** information associated with shipment (s) of the assignment:

Fulfillment Information

- » Shipment description, weight, cost, and where it should be/was shipped to
- » Shipment tracking number(s) and corresponding carriers used to ship package(s)
- » Assignment materials shipped flag (Yes or No) marked shipped by whom at what time on what date

Assignment Information

- » Assignment ID
- » Date assignment accepted
- » Date assignment scheduled
- » Unassigned date (if assignment has been unassigned)
- » Assignment Notes 1, 2 and 3



Location Information Where the Assignment Will Take Place

- » Location ID
- » Parent Levels 1, 2 and 3
- » Location Number
- » Location Address (Street, City, State, Province, Postal Code)
- » Location Instructions (info about where shipments should be delivered, etc.)

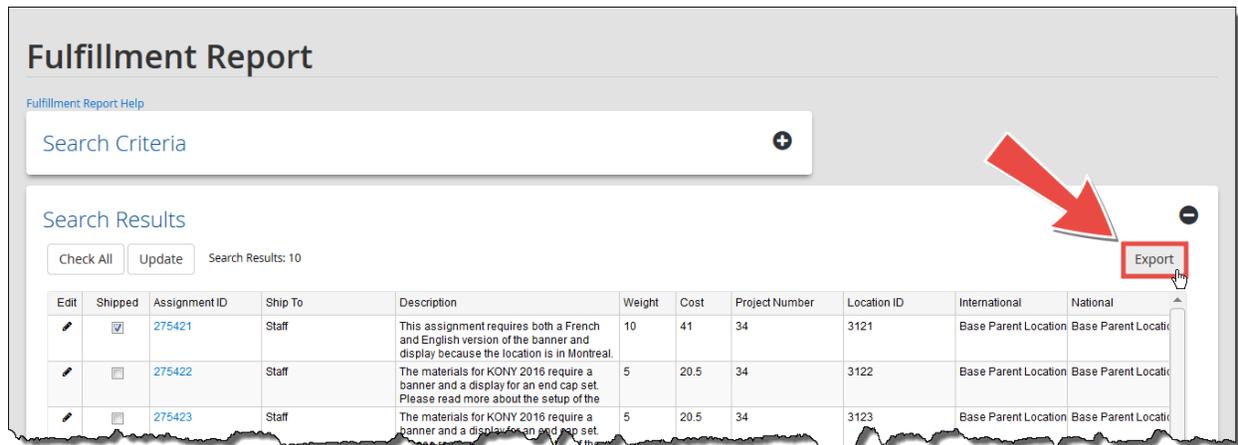
Staff Information about the Staff Member Performing the Assignment

- » Resource Number
- » Staff Member ID
- » Staff Member Shipping Address (Street, City, State, Province, Postal Code, Country)
- » Staff Member Phone Number
- » Staff Member Email Address
- » Staff Member's Supervisor Name and ID
- » Staff Member Shipping Notes (info about where deliveries should be left at the Staff Member Shipping Address, etc.)



Fulfillment Report Columns

The Fulfillment Report and the spreadsheet export of the Fulfillment Report - the latter obtained by clicking the **Export** button - contains several columns of data.



Fulfillment Report

Fulfillment Report: Help

Search Criteria +

Search Results

Check All Update Search Results: 10

Edit	Shipped	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input checked="" type="checkbox"/>	275421	Staff	This assignment requires both a French and English version of the banner and display because the location is in Montreal.	10	41	34	3121	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set.	5	20.5	34	3123	Base Parent Location	Base Parent Locati

Export

The columns are in the following order:

- A. *Edit* - If you wish to edit the **Fulfillment** information of the shipment represented in the row, click the **Edit**  button to display the **Edit** popup.
- B. *Shipped* - Has the shipment for the assignment been shipped? *Yes* (checked checkbox) or *No* (unchecked checkbox)



IMPORTANT NOTES:

In the **Fulfillment Report**, the *Shipped* column is the second column of each row. This field is editable (a checkbox which, when checked, means the assignment's shipment has been fulfilled and, when not checked, means the shipment has not been fulfilled).





Meanwhile, in the export of the **Fulfillment Report** (generated via the **Export** button), the *Shipped* column (containing a value of either *Yes* - the assignment's shipment has been fulfilled - or *No* - the assignment's shipment has not been fulfilled) is the second column - column B - in the spreadsheet export.

C. *Assignment ID*

The blue *Assignment ID* in the **Fulfillment Report** **Fulfillment Tracking Report** is actually a link that, when clicked, opens in a new browser tab the **Assignment Search** page featuring the clicked assignment the **Assignment Info** popup for the clicked assignment.

D. *Ship To* - Where the shipment should ship to

- » *Staff* - Shipment(s) to be shipped to staff member
- » *Location* - Shipment(s) to be shipped to location
- » blank - Either the project or account-level *Ship To* default used, whichever takes precedence

E. *Description* - Description of the shipment

F. *Weight* - Weight of the shipment as a decimal

G. *Cost* - Cost of the shipment as a decimal

H. *Project Number*

I. *Location ID*

J. *Location Parent Level 3*

K. *Location Parent Level 2*

L. *Location Parent Level 1*



- M. *Location Number*
- N. *Location Address* (Location Street Address)
- O. *Location City*
- P. *Location State/ Province*
- Q. *Location Postal Code*
- R. *Location Shipping Instructions* - Instructions about how to handle deliveries and where to store shipments at the location's address, etc.
- S. *Resource Number*
- T. *Staff Number* (Staff Member ID)
- U. *Staff Name* (Staff Member Name)
- V. *Staff Address* (Staff Member Shipping Street Address)
- W. *Staff City* (City from Staff Member Shipping Address)
- X. *Staff State/ Province* (State/Province from Staff Member Shipping Address)
- Y. *Staff Postal Code* (Postal Code from Staff Member Shipping Address)
- Z. *Staff Shipping Notes* - Instructions about how to handle deliveries and where to store shipments at the staff member's *Shipping Address*, etc.
- AA. *Staff Phone* (Staff Member Home Phone)
- AB. *Staff Email* (Staff Member Email)
- AC. *Staff Supervisor ID* (Staff Member Supervisor ID)
- AD. *Staff Supervisor Name* (Staff Member Supervisor Name)



- AE. *Date Accepted*- The date and time the staff member accepted the assignment
- AF. *Scheduled Date/Time* - The date and time the staff member scheduled on his/her **Calendar** to perform the assignment
- AG. *Unassigned Date* - The date and time the staff member unassigned the assignment - this cell will be blank if an assignment has not been unassigned
- AH. *Assignment Note 1*
- AI. *Assignment Note 2*
- AJ. *Assignment Note 3*
- AK. *Shipped By* - The name of the NI user who checked the *Shipped* checkbox for the assignment
- AL. *Shipped Date/Time* - The date and time when the NI user recorded by the *Shipped By* field checked the *Shipped* checkbox for the assignment
- AM. *Tracking*- The assignment's shipments' *Tracking Number(s)* plus *Carrier* in the form of a URL link
One *Tracking Number* is placed per line in the following general format: a URL link to the shipment *Carrier's* tracking website (e.g. Fedex or UPS) with the shipment's *Tracking Number* appended to the end of the URL. Clicking the URL link will open a new browser tab with the *Carrier* website's tracking page processing the shipment's *Tracking Number*.

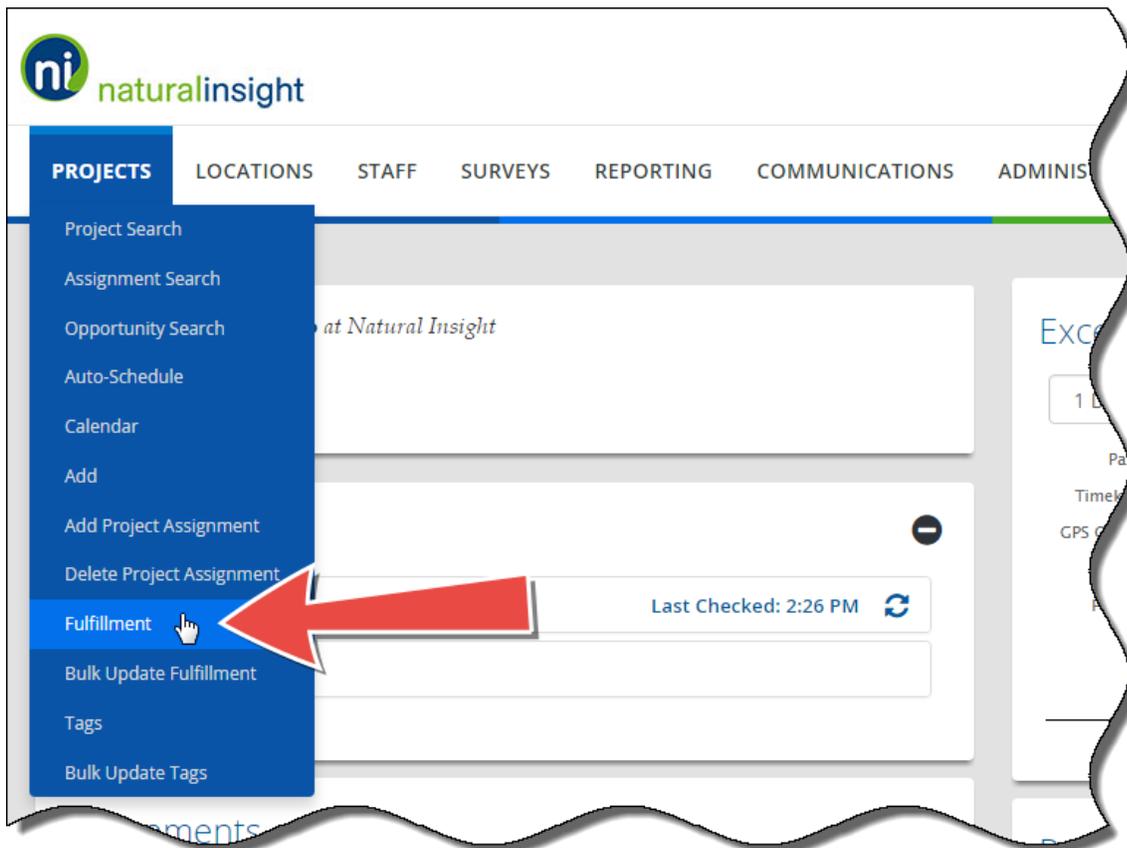
**EXAMPLE:**

```
https://www.fedex.com/apps/  
fedextrack/?action=track&action=track&tracknumbers=C4-J4S85H-02-940389435
```



Fulfillment Report for Assignments Across More than One Project

If you access the Fulfillment Report via the PROJECTS dropdown on the main menu and the Fulfillment option (PROJECTS > Fulfillment), you can select to view the report for MORE THAN one project at a time.



Fulfillment Report Search Criteria

Upon selecting the Fulfillment option, the Fulfillment Report page appears with the *Search Criteria* pod open.

Use the *Search Criteria* to search for assignments (including their associated fulfillment data). The *Search Criteria* pod includes the following fields:

- a. a date range (optional) - *Date Accepted* (start date) - *Through* (end date)

You can enter a start date for the range in the *Date Accepted* field and the end date of the range in the *Through* field. An assignment will be returned in the search results if its *Accepted Date* falls within the date range provided.

- b. *Shipped* (pre-checked)

The *All* radio button is checked by default.

- » *Yes* - Returns assignments whose shipment(s) have been shipped
- » *No* - Returns assignments whose shipment(s) have not been shipped
- » *All* - Returns assignments with shipped shipment(s) as well as assignments with unshipped shipment(s)

- c. *Project Status* (optional; multiple-select box; use the Shift or Ctrl key to select more than one contiguous option or non-contiguous option respectively)

- » *Active*
- » *Inactive*
- » *Pending*

- d. *Project* (optional; multiple-select box; use the Shift or Ctrl key to select more than one contiguous project or non-contiguous project respectively)

Select the projects for which you'd like to see the assignments and their associated fulfillment information. In the screenshot below, 2 projects have been selected in the *Project* multiple-select



box and *All* has been checked as the option for the *Shipped* radio button. As a result, all assignments from both projects display in the *Search Results* pod.

The screenshot shows the 'Fulfillment Report' interface. At the top, there is a 'Search Criteria' section with the following fields:

- Date Accepted: [calendar icon]
- Through: [calendar icon]
- Shipped: Yes No All
- Project Status: A dropdown menu with options: Active, Inactive, Pending.
- Project: A list of projects: 30 - Weekly Restock, 32 - Holiday Display 2016, 33 - New Years Eve Display 2016, 34 - KONY 2016, 35 - Winter Swiss Getaway 2016.
- Assignment ID: [text input field]

Buttons for 'Search' and 'Clear Fields' are located at the bottom right of the search criteria section.

Below the search criteria is the 'Search Results' section, which includes 'Check All', 'Update', 'Search Results: 10', and 'Export' buttons. The results are displayed in a table:

Edit	25	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input type="checkbox"/>	275421	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3121	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3123	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275424	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3125	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275425	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3126	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275426	Location	Banner, display and box for registrations for getaway.	10	40.75	35	3121	Base Parent Location	Base Parent Locatic
	<input type="checkbox"/>	275427	Location	Banner, display and box for registrations for getaway.	10	40.75	35	3122	Base Parent Location	Base Parent Locatic

e. *Assignment ID*(optional)

You can enter either one *Assignment ID* or a comma-delimited list of more than one *Assignment ID*. Search results will be limited to the assignments whose *Assignment ID* you've entered.



If you enter one or more *Assignment ID* in the *Assignment ID* field, the other fields will become gray and ineditable.

Fulfillment Report Search Results

The generated **Fulfillment Report** provides data about each assignment, the location where the assignment will take place, the staff member scheduled to staff the assignment (including the staff member's shipping address and *Shipping Notes*) and **Fulfillment** information associated with shipment (s) of the assignment:

Fulfillment Information

- » Shipment description, weight, cost, and where it should be/was shipped to
- » Shipment tracking number(s) and corresponding carriers used to ship package(s)
- » Assignment materials shipped flag (Yes or No) marked shipped by whom at what time on what date

Assignment Information

- » Assignment ID
- » Date assignment accepted
- » Date assignment scheduled
- » Unassigned date (if assignment has been unassigned)
- » Assignment Notes 1, 2 and 3

Location Information Where the Assignment Will Take Place

- » Location ID
- » Parent Levels 1, 2 and 3



- » Location Number
- » Location Address (Street, City, State, Province, Postal Code)
- » Location Instructions (info about where shipments should be delivered, etc.)

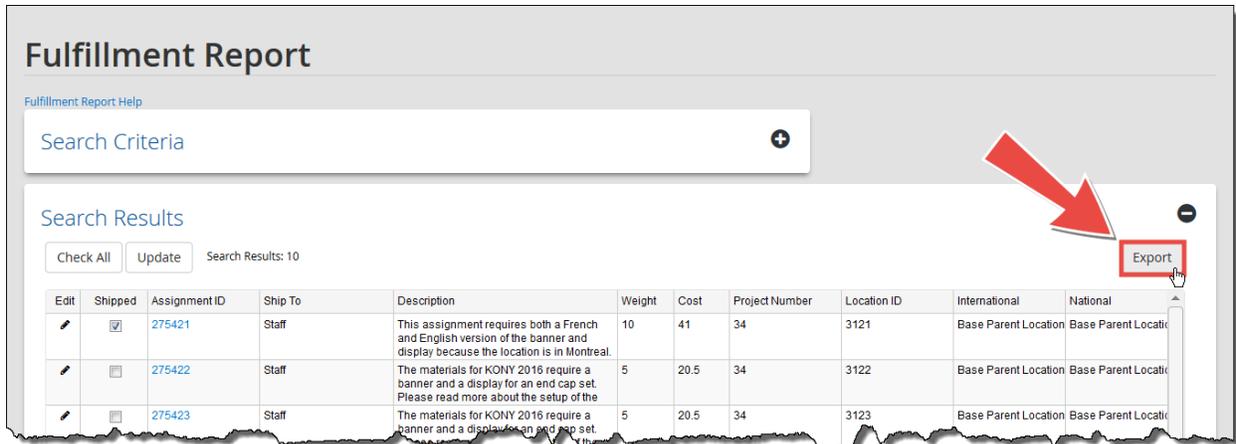
Staff Information about the Staff Member Performing the Assignment

- » Resource Number
- » Staff Member ID
- » Staff Member Shipping Address (Street, City, State, Province, Postal Code, Country)
- » Staff Member Phone Number
- » Staff Member Email Address
- » Staff Member's Supervisor Name and ID
- » Staff Member Shipping Notes (info about where deliveries should be left at the Staff Member Shipping Address, etc.)

Fulfillment Report Columns

The **Fulfillment Report** and the spreadsheet export of the **Fulfillment Report** - the latter obtained by clicking the **Export** button - contains several columns of data.





Edit	Shipped	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input checked="" type="checkbox"/>	275421	Staff	This assignment requires both a French and English version of the banner and display because the location is in Montreal.	10	41	34	3121	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3123	Base Parent Location	Base Parent Locati

The columns are in the following order:

- A. *Edit* - If you wish to edit the **Fulfillment** information of the shipment represented in the row, click the **Edit**  button to display the **Edit** popup.
- B. *Shipped* - Has the shipment for the assignment been shipped? *Yes* (checked checkbox) or *No* (unchecked checkbox)



IMPORTANT NOTES:

In the **Fulfillment Report**, the *Shipped* column is the second column of each row. This field is editable (a checkbox which, when checked, means the assignment's shipment has been fulfilled and, when not checked, means the shipment has not been fulfilled).

Meanwhile, in the export of the **Fulfillment Report** (generated via the **Export** button), the *Shipped* column (containing a value of either *Yes* - the assignment's shipment has been fulfilled - or *No* - the assignment's shipment has not been fulfilled) is the second column - column B - in the spreadsheet export.



C. *Assignment ID*

The blue *Assignment ID* in the **Fulfillment Report** **Fulfillment Tracking Report** is actually a link that, when clicked, opens in a new browser tab the **Assignment Search** page featuring the clicked assignment the **Assignment Info** popup for the clicked assignment.

D. *Ship To* - Where the shipment should ship to

- » *Staff* - Shipment(s) to be shipped to staff member
- » *Location* - Shipment(s) to be shipped to location
- » blank - Either the project or account-level *Ship To* default used, whichever takes precedence

E. *Description* - Description of the shipment

F. *Weight* - Weight of the shipment as a decimal

G. *Cost* - Cost of the shipment as a decimal

H. *Project Number*

I. *Location ID*

J. *Location Parent Level 3*

K. *Location Parent Level 2*

L. *Location Parent Level 1*

M. *Location Number*

N. *Location Address* (Location Street Address)

O. *Location City*

P. *Location State/ Province*



- Q. *Location Postal Code*
- R. *Location Shipping Instructions* - Instructions about how to handle deliveries and where to store shipments at the location's address, etc.
- S. *Resource Number*
- T. *Staff Number* (Staff Member ID)
- U. *Staff Name* (Staff Member Name)
- V. *Staff Address* (Staff Member Shipping Street Address)
- W. *Staff City* (City from Staff Member Shipping Address)
- X. *Staff State/ Province* (State/Province from Staff Member Shipping Address)
- Y. *Staff Postal Code* (Postal Code from Staff Member Shipping Address)
- Z. *Staff Shipping Notes* - Instructions about how to handle deliveries and where to store shipments at the staff member's *Shipping Address*, etc.
- AA. *Staff Phone* (Staff Member Home Phone)
- AB. *Staff Email* (Staff Member Email)
- AC. *Staff Supervisor ID* (Staff Member Supervisor ID)
- AD. *Staff Supervisor Name* (Staff Member Supervisor Name)
- AE. *Date Accepted*- The date and time the staff member accepted the assignment
- AF. *Scheduled Date/Time* - The date and time the staff member scheduled on his/her **Calendar** to perform the assignment
- AG. *Unassigned Date* - The date and time the staff member unassigned the assignment - this cell will be blank if an assignment has not been unassigned



AH. *Assignment Note 1*

AI. *Assignment Note 2*

AJ. *Assignment Note 3*

AK. *Shipped By* - The name of the NI user who checked the *Shipped* checkbox for the assignment

AL. *Shipped Date/Time* - The date and time when the NI user recorded by the *Shipped By* field checked the *Shipped* checkbox for the assignment

AM. *Tracking* - The assignment's shipments' *Tracking Number(s)* plus *Carrier* in the form of a URL link
One *Tracking Number* is placed per line in the following general format: a URL link to the shipment *Carrier's* tracking website (e.g. Fedex or UPS) with the shipment's *Tracking Number* appended to the end of the URL. Clicking the URL link will open a new browser tab with the *Carrier* website's tracking page processing the shipment's *Tracking Number*.

**EXAMPLE:**

`https://www.fedex.com/apps/`

`fedextrack/?action=track&action=track&tracknumbers=C4-J4S85H-02-940389435`



Fulfillment Info Web Service Overview

The Natural Insight **Fulfillment Info Web Service** exports assignment-level Natural Insight XML fulfillment data useful for integration with proprietary or third-party fulfillment systems. The on-demand **Fulfillment Info API** provides fulfillment data per scheduled and unassigned assignments across all active projects within a 31 day or less range. You can request this data according to the following search criteria:

» date range (*getFulfillment* method)

Description

Retrieve and use Natural Insight assignment-level fulfillment data across all active projects where each assignment exported has either been scheduled or unassigned within the specified date range.



EXAMPLE:

EXAMPLE OF XML HIERARCHY RETURNED WHEN XML FULFILLMENT DATA IS REQUESTED:

```
<?xml version="1.0" encoding="utf-8"?>

<fulfillments>

  <fulfillment>

    <visit id="12345" dateAccepted="yyyy-mm-dd 12:37:00" scheduleStartDateTime="yyyy-mm-dd 12:37:00"
    unassignDateTime="" visitNote1="FALL PLANO: WM 20x57n lightbox
    F15 HOT SPOT: 4HS - 3FT TIME IN STORE: 1HR" visitNote2="PLEASE
    ALSO DO project 6681 NESTLE STICKER DURING THIS VISIT"
```





```
visitNote3="" fulfilled="YES" shipTo="location" descrip-
tion="Display Materials - 4 x 6 poster; 2 - 1 x 1 banners" weight-
t="20.00" cost="10.00" trackingNumber="1ZX22W721423613056"
carrier="FedEx"/>
```

```
<location id="WM23346" parentLevel3="WALMART" par-
entLevel2="WALMART" parentLevel1="WALMART" number="23345"
Name="WAL-MART #23345" address="123 4th St" city="London" state-
e="BIR" postalCode="B8Z 7R4" locationInstruction="Check for deliv-
eries in storage rack #4495 organized by carrier and tracking
number." resourceNumber="1"/>
```

```
<staff id="3486" staffName="Jill Smith"
shipStreet="564 Daisy Ave" shipCity="New York" shipStateCode="NY"
shipPostalCode="01185" mobilePhoneNumber="858-486-2785"
emailAddress="jill@agentsmith.com" shippingNote="Deliveries to be
left in inside lobby with doorman on duty who will sign if
needed." supervisorId="3498" supervisorName="Janice Simpson"/>
```

```
</fulfillment>
```

```
<fulfillment>
```

```
<visit etc. />
```

```
<location etc. />
```

```
<staff etc. />
```

```
</fulfillment>
```

```
</fulfillments>
```





NOTE: Each XML <fulfillment> element within the <fulfillments> tag will be presented in chronological order of the last accepted date or unassigned date within the date range chosen.

Frequency

On-demand

WSDL

You can access the WSDL for the Natural Insight Fulfillment Info API at:

<https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>.

```
<wsdl:definitions xmlns:apachesoap="http://xml.apache.org/xml-soap"
xmlns:impl="http://niWeb" xmlns:intf="http://niWeb"
xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns1="http://rpc.xml.coldfusion"
xmlns:wsdl="http://schemas.xmlsoap.org/wsdl/"
xmlns:wsdlsoap="http://schemas.xmlsoap.org/wsdl/soap/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" targetNamespace="http://niWeb">

<!-- WSDL created by ColdFusion -->

<wsdl:types>

<schema xmlns="http://www.w3.org/2001/XMLSchema"
targetNamespace="http://rpc.xml.coldfusion">

<import namespace="http://xml.apache.org/xml-soap"/>

<import namespace="http://niWeb"/>
```



```
<import namespace="http://schemas.xmlsoap.org/soap/encoding/" />

<complexType name="CFCInvocationException">

    <sequence />

</complexType>

<complexType name="QueryBean">

    <sequence>

        <element name="columnList" nillable="true"
            type="impl:ArrayOf_xsd_string" />

        <element name="data" nillable="true"
            type="impl:ArrayOfArrayOf_xsd_anyType" />

    </sequence>

</complexType>

</schema>

<schema xmlns="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://niWeb">

    <import namespace="http://xml.apache.org/xml-soap" />

    <import namespace="http://rpc.xml.coldfusion" />

    <import namespace="http://schemas.xmlsoap.org/soap/encoding/" />

    <complexType name="ArrayOf_xsd_string">

        <complexContent>
```



```
        <restriction base="soapenc:Array">

            <attribute ref="soapenc:arrayType" wsdl:arrayType="xsd:string[]" />

        </restriction>

    </complexContent>

</complexType>

<complexType name="ArrayOfArrayOf_xsd_anyType">

    <complexContent>

        <restriction base="soapenc:Array">

            <attribute ref="soapenc:arrayType"
                wsdl:arrayType="xsd:anyType[][]" />

        </restriction>

    </complexContent>

</complexType>

</schema>

<schema xmlns="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://xml.apache.org/xml-soap">

    <import namespace="http://niWeb"/>

    <import namespace="http://rpc.xml.coldfusion"/>

    <import namespace="http://schemas.xmlsoap.org/soap/encoding/" />
```



```
<complexType name="mapItem">

  <sequence>

    <element name="key" nillable="true" type="xsd:anyType"/>

    <element name="value" nillable="true" type="xsd:anyType"/>

  </sequence>

</complexType>

<complexType name="Map">

  <sequence>

    <element maxOccurs="unbounded" minOccurs="0" name="item"
      type="apachesoap:mapItem"/>

  </sequence>

</complexType>

</schema>

</wsdl:types>

<wsdl:message name="CFCInvocationException">

  <wsdl:part name="fault" type="tns1:CFCInvocationException"></wsdl:part>

</wsdl:message>

<wsdl:message name="getFulfillmentRequest">

  <wsdl:part name="authCd" type="xsd:anyType"></wsdl:part>
```



```
<wsdl:part name="startDate" type="xsd:anyType"></wsdl:part>

<wsdl:part name="endDate" type="xsd:anyType"></wsdl:part>

</wsdl:message>

<wsdl:message name="getFulfillmentResponse">

  <wsdl:part name="getFulfillmentReturn" type="xsd:string"></wsdl:part>

</wsdl:message>

<wsdl:portType name="fulfillmentWebService">

  <wsdl:operation name="getFulfillment" parameterOrder="authCd startDate
endDate">

    <wsdl:input message="impl:getFulfillmentRequest"
name="getFulfillmentRequest"></wsdl:input>

    <wsdl:output message="impl:getFulfillmentResponse"
name="getFulfillmentResponse"></wsdl:output>

    <wsdl:fault message="impl:CFCInvocationException"
name="CFCInvocationException"></wsdl:fault>

  </wsdl:operation>

</wsdl:portType>

<wsdl:binding name="fulfillmentWebService.cfcSoapBinding"
type="impl:fulfillmentWebService">

  <wsdlsoap:binding style="rpc"
transport="http://schemas.xmlsoap.org/soap/http"/>
```



```
<wsdl:operation name="getFulfillment">

  <wsdlsoap:operation soapAction=""/>

  <wsdl:input name="getFulfillmentRequest">

    <wsdlsoap:body
      encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
      namespace="http://niWeb" use="encoded"/>

  </wsdl:input>

  <wsdl:output name="getFulfillmentResponse">

    <wsdlsoap:body
      encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
      namespace="http://niWeb" use="encoded"/>

  </wsdl:output>

  <wsdl:fault name="CFCInvocationException">

    <wsdlsoap:fault
      encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
      name="CFCInvocationException"
      namespace="http://niWeb" use="encoded"/>

  </wsdl:fault>

</wsdl:operation>

</wsdl:binding>

<wsdl:service name="fulfillmentWebServiceService">

  <wsdl:documentation>Report Web service component</wsdl:documentation>
```



```
<wsdl:port binding="impl:fulfillmentWebService.cfcSoapBinding"
name="fulfillmentWebService.cfc">

  <wsdlsoap:address
    location="http://my.naturalinsight.com/fulfillmentWebService.cfc"/>

</wsdl:port>

</wsdl:service>

</wsdl:definitions>
```



Fulfillment Info Data Descriptions (Assignment Level)

Fulfillment Info can export fulfillment data at the assignment¹ level (including tracking numbers and carrier for each shipment) according to date range. Since a fulfillment is a shipment, the **Fulfillment Info Web Service** will read all fulfillments recorded in Natural Insight according to date range. For example, if a date range of one day - November 24, 2015 - is sent in to the **Fulfillment Info API**, then all of the fulfillments whose assignments had accepted dates within that range (on November 24, 2015) will be returned.

An example of the XML returned when a call to the **Fulfillment Info API** is made is below. The XML elements <visit>, <location> and <staff> contain any and all of each fulfillment's data. As a result, a <fulfillment> element can have more than one <visit> (and the visit's corresponding <location> and <staff> elements) nested inside of it which means this fulfillment (a shipment of materials) applies to two assignments.



EXAMPLE:

EXAMPLE OF THE <FULFILLMENTS> ELEMENT WITH NESTED <FULFILLMENT> ELEMENTS

```
<fulfillments>
```

```
<fulfillment>
```

¹Whenever "an assignment" is used in this text, understand that "an assignment" is one of many terms Natural Insight clients may use to refer to work being done in a particular location at a particular time on a particular date. Some clients refer to assignments as calls, visits, assignments, or activations as just a few examples. In the retail world, clients frequently use the term task or to-do. When dealing with Natural Insight Web Services, you will see "visit" or "visits" used to refer to assignments such as in the **Visit Creation API**.





```
<visit id="12345" dateAccepted="yyyy-mm-dd 12:37:00"
scheduleStartDateTime="yyyy-mm-dd 12:37:00"
unassignDateTime="" visitNote1="FALL PLANO: WM 20x57n lightbox
F15 HOT SPOT: 4HS - 3FT TIME IN STORE: 1HR" visitNote2="PLEASE
ALSO DO project 6681 NESTLE STICKER DURING THIS VISIT"
visitNote3="" fulfilled="YES" shipTo="location"
description="Display Materials - 4 x 6 poster; 2 - 1 x 1 banners"
weight="20.00" cost="10.00" trackingNumber="1ZX22W721423613056"
carrier="FedEx"/>
```

```
<location id="WM23346" parentLevel3="WALMART"
parentLevel2="WALMART" parentLevel1="WALMART" number="23345"
Name="WAL-MART #23345" address="123 4th St" city="London"
state="BIR" postalCode="B8Z 7R4" locationInstruction="Check for
deliveries in storage rack #4495 organized by carrier and track-
ing number." resourceNumber="1"/>
```

```
<staff id="3486" staffName="Jill Smith"
shipStreet="564 Daisy Ave" shipCity="New York" shipStateCode="NY"
shipPostalCode="01185" mobilePhoneNumber="858-486-2785"
emailAddress="jill@agentsmith.com" shippingNote="Deliveries to be
left in inside lobby with doorman on duty who will sign if
needed." supervisorId="3498" supervisorName="Janice Simpson"/>
```

```
</fulfillment>
```

```
<fulfillment>
```

```
<visit etc. />
```

```
<location etc. />
```

```
<staff etc. />
```





```

<visit etc. />

<location etc. />

<staff etc. />

</fulfillment>

</fulfillments>

```

Access the **Fulfillment Info** XML-based WSDL (using the *getFulfillment* method) at <https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>.

An assignment is associated with the fulfillment.

<visit> Element: nested <visit> within <fulfillment>			
XML Attribute	Data Type	Max Data Size	Description
<i>id</i>	Integer		Assignment ID that uniquely identifies an assignment
<i>dateAccepted</i>	Date/Time		The date and time the assignment was accepted (obtained from Assignment History table)
<i>scheduleStartDateTime</i>	Date/Time		The date and time the assignment was scheduled
<i>unassignDateTime</i>	Date/Time		The date and time the assignment was unassigned (obtained from Assignment History table)
<i>visitNote1</i>	VARCHAR	500	Assignment Note 1
<i>visitNote2</i>	VARCHAR	500	Assignment Note 2
<i>visitNote3</i>	VARCHAR	500	Assignment Note 3



<visit> Element: nested <visit> within <fulfillment>

XML Attribute	Data Type	Max Data Size	Description
<i>fulfilled</i>	VARCHAR	5	<i>fulfilled</i> indicates whether materials for the assignment at hand have been shipped or not. The accepted values are "YES" or "NO". <i>fulfilled</i> is a flag (a checkbox) in the Fulfillment Report that a user can check to indicate the materials for the assignment have been shipped to the shipping company indicated in the <i>carrier</i> attribute.
<i>shipTo</i>	VARCHAR	50	The accepted text string values are either "location" or "staff". If "location" is the provided value of <i>shipTo</i> , the assignment materials will be shipped to the location (<location>) address where the assignment will take place. If "staff" is the provided value of <i>shipTo</i> , the materials will be shipped to the shipping address of the staff member (<staff>) scheduled to perform the assignment.
<i>description</i>	VARCHAR	500	A text description of what materials are to be fulfilled/were fulfilled (shipped) for the assignment.
<i>weight</i>	Decimal	(9,2)	The weight as a number (decimal) of the fulfilled materials/materials to be fulfilled for the assignment.
<i>cost</i>	Decimal	(9,2)	The cost as a number (decimal) of the fulfilled materials/materials to be fulfilled for the assignment.
<i>trackingNumber</i>	VARCHAR	255	Either a single tracking number issued by the <i>carrier</i> to track the shipment of materials for the assignment - such as "1ZX22W721423613056" - or a comma-delimited list of multiple tracking numbers - "1ZX22W721423613056, 2FX22W721423613056, 8PX22W721423613056" - if more than one shipment is associated with an assignment.
<i>carrier</i>	VARCHAR	100	The name of the carrier such as "UPS", "FedEx", "USPS", "DHL US", "DHL Global", "Pilot" or "OSM" used to ship (fulfill) the assignment materials.





NOTE: <visit> is used in the Natural Insight Fulfillment API even though, in your client instance, you may refer to work as assignments, calls, tasks, jobs, etc.

A location is associated with the assignment.

<location> Element: nested <location> within <fulfillment>			
XML Attribute	Data Type	Max Data Size	Description
<i>id</i>	VARCHAR	25	LocationID that uniquely identifies a location
<i>parentLevel3</i>	VARCHAR		A field to designate or describe the highest level out of 3 total hierarchical levels of where a location exists within the hierarchy. For example, <i>parentLevel3</i> could designate the national level and have a value of "United States".
<i>parentLevel2</i>	VARCHAR		A field to designate or describe the middle level out of 3 total hierarchical levels of where a location exists within the hierarchy. For example, <i>parentLevel2</i> could designate the state level and have a value of "California".
<i>parentLevel1</i>	VARCHAR		A field to designate or describe the lowest level out of 3 total hierarchical levels of where a location exists within the hierarchy. For example, <i>parentLevel1</i> could designate the regional level and have a value of "Monterey".
<i>number</i>	VARCHAR	50	Location number
<i>name</i>	VARCHAR	500	Location name
<i>address</i>	VARCHAR	500	Location address
<i>city</i>	VARCHAR	150	Location city
<i>state</i>	VARCHAR	3	Location state or province
<i>postalCode</i>	VARCHAR	25	Location postal code



<location> Element: nested <location> within <fulfillment>

XML Attribute	Data Type	Max Data Size	Description
<i>locationInstruction</i>	Char	500	Shipping, delivery, storage, etc. - any fulfillment - information or instructions for a location such as "Check for deliveries in storage rack #4495 organized by carrier and tracking number."
<i>resourceNumber</i>			

A staff member will be associated with the assignment.

<staff> Element: nested <staff> within <fulfillment>

XML Attribute	Data Type	Max Data Size	Description
<i>id</i>	VARCHAR	25	Staff Member ID that uniquely identifies a staff member
<i>staffName</i>	VARCHAR	50	First name and last name of staff member (e.g. Jennifer McLeod)
<i>shipStreet</i>	VARCHAR	500	Street address of staff member's shipping address
<i>shipCity</i>	VARCHAR	200	City of staff member's shipping address
<i>shipStateCode</i>	VARCHAR	3	State or province of staff member's shipping address
<i>shipPostalCode</i>	VARCHAR	15	Postal code of staff member's shipping address
<i>mobilePhoneNumber</i>	VARCHAR	25	Mobile phone number of staff member
<i>emailAddress</i>	VARCHAR	250	Email address of staff member
<i>shippingNote</i>	VARCHAR	500	Shipping, delivery, storage, etc. - any fulfillment - information or instructions for a staff member such as "Deliveries to be left in inside lobby with doorman on duty who will sign if needed."
<i>supervisorId</i>	VARCHAR	25	Staff Member ID of the supervisor of the staff member indicated in the <staff> tag's <i>id</i> attribute.



<staff> Element: nested <staff> within <fulfillment>

XML Attribute	Data Type	Max Data Size	Description
<i>supervisorName</i>	VARCHAR	50	First name and last name of the supervisor of the staff member indicated in the <staff> tag's <i>id</i> attribute (e.g. Beverly Thomas)



NOTE: If any shipping address data points are missing in the staff member's profile, then the <staff> tag's corresponding attribute will have an empty string as its value. For example: `shipPostalCode=""`.



Fulfillment Info Web Service Method

The Natural Insight SOAP-based **Fulfillment Info Web Service** allows clients to export Natural Insight fulfillment data as a data package according to a 31 day or less date range using the *getFulfillment* method.

The *getFulfillment* public method in the Natural Insight **Fulfillment Info Web Service** can be consumed using either the SOAP protocol over HTTPS or simple HTTP GET/POST requests. The WSDL definition for the Natural Insight **Fulfillment Info Web Service**, located at the URL, <https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>, describes its methods and arguments in detail.

To retrieve a fulfillment data package by date range, use the following URL:

```
https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl
&method=getFulfillment&authCd=123-456&
startDate=2015-04-01 HH:MM:SS&endDate=2015-04-11 HH:MM:SS
```

Replace the parameter values in the above URL with your personalized parameters described in the next section.

getFulfillment Parameters

The *getFulfillment* method takes three parameters:

1. required string *authCd*- Contact Natural Insight Client Services to obtain your client authorization code (*authCd*).
2. required *startDate* in ISO 8601 format
3. required *endDate* in ISO 8061 format





IMPORTANT NOTES:

The *startDate* and *endDate* must delimit a date range of 31 days or less.

The dates passed to the *getFulfillment* method will be compared to assignment accepted dates.

The *getFulfillment* method returns the fulfillment data package in the default format of WDDX (Web Distributed Data eXchange) - a string of XML-encoded data.

Return Formats of the *getFulfillment* Method

Though the default return format of the *getFulfillment* method is WDDX, you can also request the package as a string only or in JSON (JavaScript Object Notation). To do so, append “&returnformat=JSON” or “&returnformat=plain” at the end of the *getFulfillment* URL to indicate the preferred return format. Thus, the possible parameter values for *returnformat* are:

1. WDDX (the default)
2. Plain (for a string only)
3. JSON



Fulfillment Info Web Service API Summary

URL

<https://my.naturalinsight.com/fulfillmentWebService.cfc>

WSDL

<https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>

Methods

getFulfillment Method

```
<wsdl:operation name="getFulfillment" parameterOrder="authCd startDate
endDate">

  <wsdl:input message="impl:getFulfillmentRequest"
name="getFulfillmentRequest"></wsdl:input>

  <wsdl:output message="impl:getFulfillmentResponse"
name="getFulfillmentResponse"></wsdl:output>

  <wsdl:fault message="impl:CFCInvocationException"
name="CFCInvocationException"></wsdl:fault>

</wsdl:operation>
```



getFulfillment Parameters

1. required string *authCd*
2. required *startDate* in ISO 8601 format¹
3. required *endDate* in ISO 8601 format

getFulfillment Description

The *getFulfillment* method allows you to request a fulfillment data package by date range (i.e., any information on fulfillments - shipments - associated with assignments within the specified date range in Natural Insight) and returns the fulfillment data directly.

¹The date must be in the ISO 8061 format - *yyyymmdd* or *yyyy-mm-dd* - with *mm* and *dd* being 2 characters, padded in front with a 0 for single-digit values.

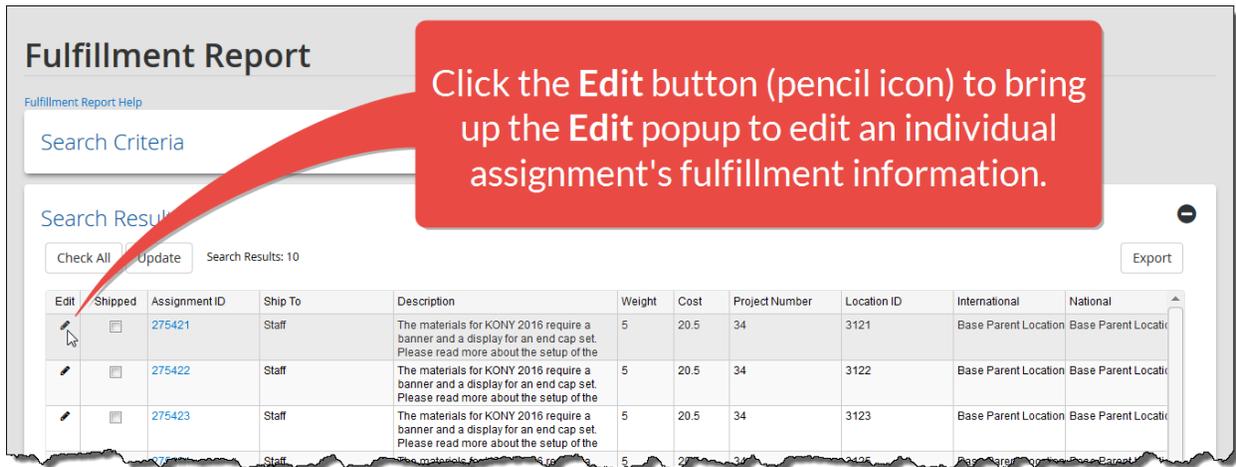
The time must be in the ISO 8061 format - *hh:mm* or *hh:mm:ss* - with *hh*, *mm* and *ss* being 2 characters, padded in front with a 0 for single-digit values.

The date precedes the time with the resulting combined date/time format as "2014-04-05 14:30:00".



Edit Assignment Fulfillment Info Individually

Once the Fulfillment Report is run, you can edit the fulfillment information of any assignment on an individual basis by clicking the **Edit**  button on the row of the assignment whose information you'd like to change.



Fulfillment Report

Fulfillment Report Help

Search Criteria

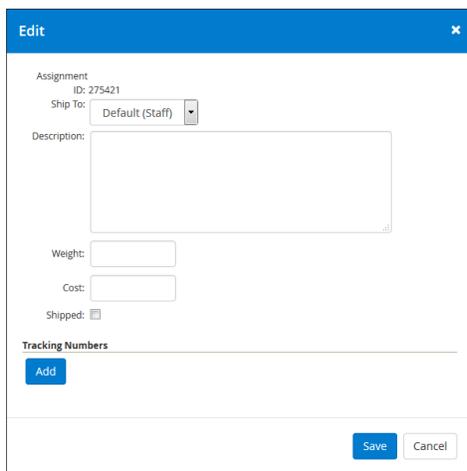
Search Results

Check All Update Search Results: 10 Export

Edit	Shipped	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input type="checkbox"/>	275421	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3121	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Locati
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3123	Base Parent Location	Base Parent Locati

Click the **Edit** button (pencil icon) to bring up the **Edit** popup to edit an individual assignment's fulfillment information.

Once you click the **Edit**  button, the **Edit** popup appears.



Edit

Assignment ID: 275421

Ship To:

Description:

Weight:

Cost:

Shipped:

Tracking Numbers



You can edit the following **Fulfillment** fields of an assignment through the popup:

The screenshot shows an 'Edit' popup window for assignment 275421. The fields are as follows:

- Assignment ID: 275421
- Ship To: Location (dropdown menu)
- Description: This assignment requires both a French and English version of the banner and display because the location is in Montreal.
- Weight: 10
- Cost: 41.00
- Shipped:
- Shipped By: Gordon Go
- at: 12/14/2015 10:16 AM
- Tracking Numbers: 1Z-U6H9D5-03-73929171 (with a dropdown menu set to UPS)

Buttons: Save, Cancel (at the bottom of the popup)

1. *Ship To*

Though the *Ship To* field may have been determined by either an account-wide or project-wide default, you can change the value (either *Staff* or *Location*) of the *Ship To* field for an individual assignment so that its shipment(s) are shipped to the value defined at the assignment-level via the **Edit** popup.

2. *Description*

3. *Weight*

4. *Cost*

5. Shipped

You can indicate that an assignment's shipment(s) have been shipped by checking the *Shipped* checkbox. The user who checked the *Shipped* checkbox for an assignment will be recorded under the assignment's *Shipped By* field and the date and time the *Shipped* checkbox was checked will be recorded under its *Shipped Date/Time* field. When you check the *Shipped* checkbox in an assignment's **Edit** popup, the *Shipped By* and *Shipped Date/Time* values will dynamically appear under the *Shipped* checkbox.

Edit [X]

Assignment275421
ID:

Ship To: Location [v]

Description: This assignment requires both a French and English version of the banner and display because the location is in Montreal.

Weight: 10

Cost: 41.00

Shipped:

Shipped By: Gordon Go
at: 12/14/2015 10:16 AM

Tracking Numbers

1Z-U6H9D5-03-7392917 [v] UPS [v] Save Cancel

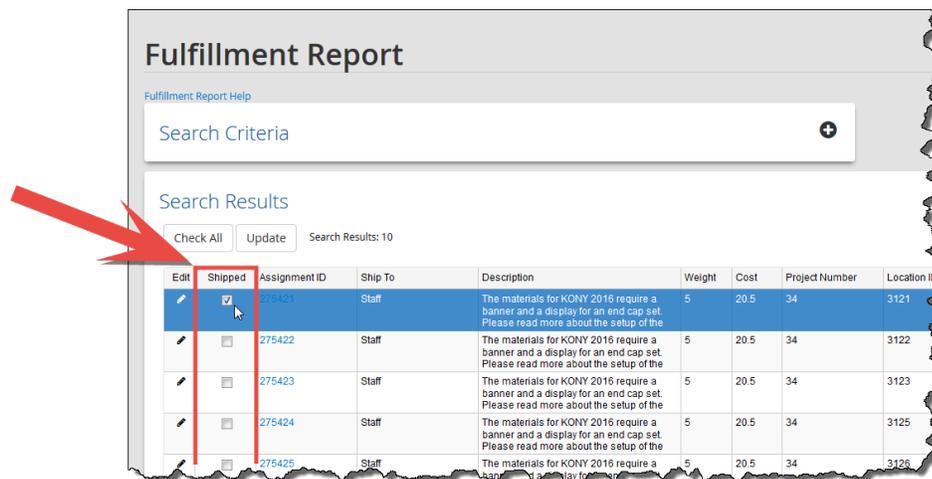
Save Cancel





IMPORTANT NOTES:

You can also edit an assignment's *Shipped* flag directly on the **Fulfillment Report** by checking (or unchecking) the *Shipped* checkbox on the row of the assignment you'd like to edit.



Not only can you edit the *Shipped* flag for an individual assignment but you can also use the **Check All** button to check the *Shipped* flag for all of the assignments displayed in the *Search Results* of the **Fulfillment Report** you have run. To record the change in *Shipped* status, you must then click the **Update** button.

If all of the assignments in the *Search Results* pod have the *Shipped* column checked, the **Check All** button will exhibit a toggle behavior when clicked. In other words, clicking the **Check All** button will uncheck all of the assignments' *Shipped* flag. To save the change, you must click the **Update** button.

6. Tracking Number(s)

You can add one or more *Tracking Number(s)* to an assignment. For example, if you add 2 *Tracking Number(s)* to an assignment, this means that the assignment has 2 separate shipments



associated with it. To add one *Tracking Number* at a time to the assignment in the **Edit** popup, click the **Add** button.

The screenshot shows an 'Edit' popup window with a blue header and a close button. The main content area contains the following fields and information:

- Assignment ID: 275421
- Ship To: Location (dropdown menu)
- Description: This assignment requires both a French and English version of the banner and display because the location is in Montreal.
- Weight: 10
- Cost: 41.00
- Shipped:
- Shipped By: Gordon Go
- at: 12/14/2015 10:16 AM

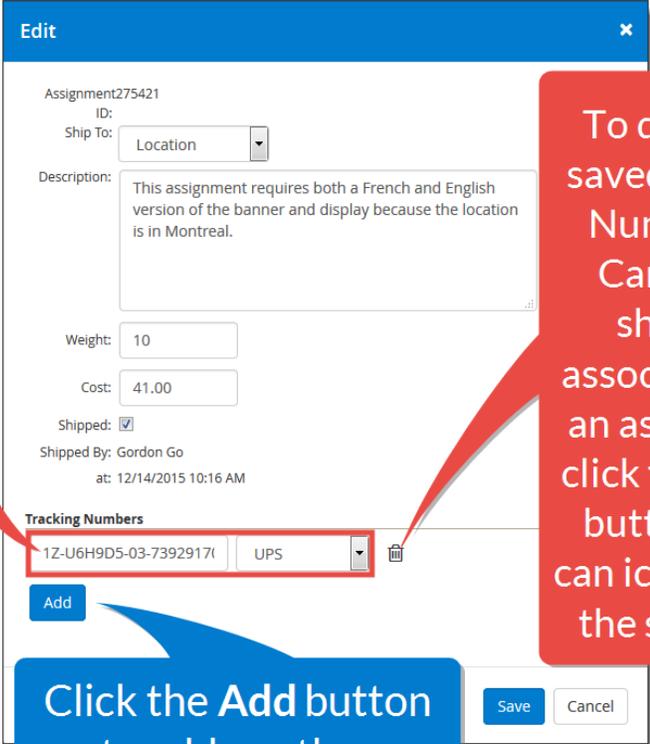
Below these fields is a section titled 'Tracking Numbers' with a red-bordered 'Add' button. A large red arrow points from the right side of the window towards the 'Add' button. At the bottom right of the popup are 'Save' and 'Cancel' buttons.

Upon clicking the **Add** button, the *Tracking Number* and *Carrier* fields appear. Enter the values of these 2 fields for a shipment tied to the assignment and click **Save**. Click the **Cancel** button if you need to cancel out of adding a shipment's information to the assignment.

The screenshot shows an 'Edit' window for 'Assignment275421'. The 'Ship To' field is set to 'Location'. The 'Description' field contains the text: 'This assignment requires both a French and English version of the banner and display because the location is in Montreal.' The 'Weight' is 10 and the 'Cost' is 41.00. The 'Shipped' checkbox is checked, and the 'Shipped By' is 'Gordon Go' at '12/14/2015 10:16 A'. The 'Tracking Numbers' field contains 'Z-U6H9D5-03-73929170'. A dropdown menu for 'Carrier' is open, with 'UPS' selected. Two red callout boxes are present: one pointing to the 'Tracking Numbers' field with the text 'Tracking Number for the shipment', and another pointing to the 'Carrier' dropdown with the text 'Carrier for the shipment'.



Upon clicking **Save**, you will see the stored *Tracking Number* and *Carrier* of the shipment you just added to the assignment. If you made a mistake and need to delete the shipment (i.e. the *Tracking Number* and *Carrier* of the shipment), click the **Delete**  (trash can icon) button next to the shipment's information. If you have an additional shipment to record for the assignment, click the **Add** button and follow the process described above.



The screenshot shows the 'Edit' form for Assignment 275421. The form includes fields for 'Ship To' (Location), 'Description' (This assignment requires both a French and English version of the banner and display because the location is in Montreal.), 'Weight' (10), 'Cost' (41.00), 'Shipped' (checked), and 'Shipped By' (Gordon Go at 12/14/2015 10:16 AM). Below these fields is a table of 'Tracking Numbers' with one entry: '1Z-U6H9D5-03-73929171' and 'UPS'. A trash can icon is next to the entry. At the bottom of the form are 'Add', 'Save', and 'Cancel' buttons.

Saved Tracking Number & Carrier of a shipment associated with an assignment

To delete the saved Tracking Number and Carrier of a shipment associated with an assignment, click the Delete button (trash can icon) next to the shipment.

Click the Add button to add another shipment's Tracking Number and Carrier associated with this assignment.

If another shipment is added to the assignment, it appears below any previously entered shipments in the *Tracking Number(s)* section of the **Edit** popup.

The screenshot shows an 'Edit' popup window for Assignment 275421. The window contains the following fields and information:

- Assignment ID:** 275421
- Ship To:** Location (dropdown menu)
- Description:** This assignment requires both a French and English version of the banner and display because the location is in Montreal.
- Weight:** 10
- Cost:** 41.00
- Shipped:**
- Shipped By:** Gordon Go
- at:** 12/14/2015 10:16 AM
- Tracking Numbers:**
 - C4-J4S85H-02-94038943! (FedEx)
 - 1Z-U6H9D5-03-7392917I (UPS)

A red callout box on the left side of the popup contains the text "2 shipments added to an assignment" and points to the tracking numbers section. At the bottom of the popup are "Add", "Save", and "Cancel" buttons.

After you have finished making edits to the **Fulfillment** information of an individual assignment via its **Edit** popup, click the **Save** button on the popup to save the edited information.



The edits you have made will be reflected in the row of the assignment you have edited in the *Search Results* pod of the **Fulfillment Report**.

The edits to the Fulfillment information of an assignment are displayed in the row of the assignment in the *Search Results* pod of the **Fulfillment Report**.

Fulfillment Report

Fulfillment Report Help

Search Criteria +

Search Results -

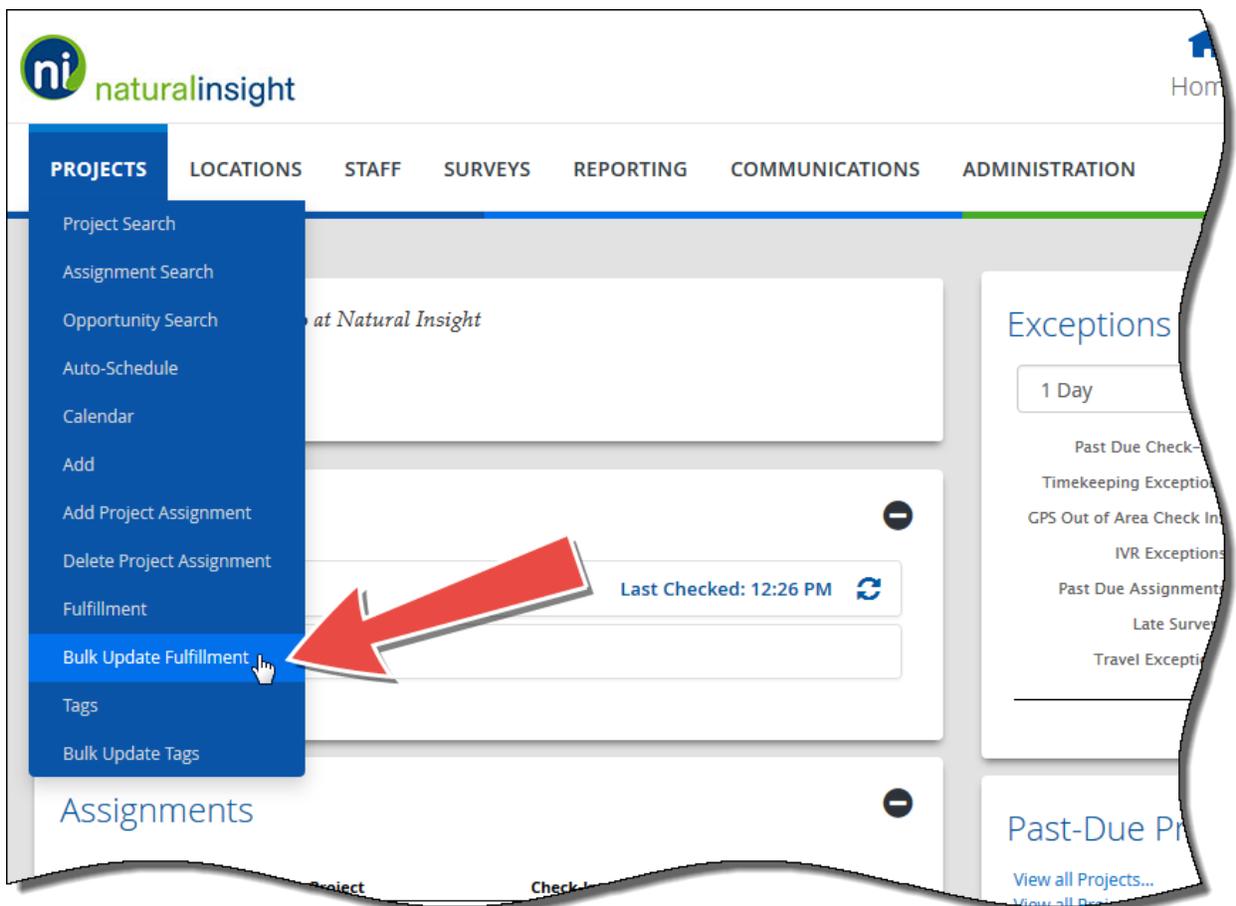
Search Results: 10

Edit	Shipped	Assignment ID	Ship To	Description	Weight	Cost	Project Number	Location ID	International	National
	<input checked="" type="checkbox"/>	275421	Location	This assignment requires both a French and English version of the banner and display because the location is in Montreal.	10	41	34	3121	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275422	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3122	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275423	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3123	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275424	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3125	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275425	Staff	The materials for KONY 2016 require a banner and a display for an end cap set. Please read more about the setup of the	5	20.5	34	3126	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275426	Location	Banner, display and box for registrations for getaway.	10	40.75	35	3121	Base Parent Location	Base Parent Location
	<input type="checkbox"/>	275427	Location	Banner, display and box for registrations for getaway.	10	40.75	35	3122	Base Parent Location	Base Parent Location



Edit Assignment Fulfillment Information in Bulk

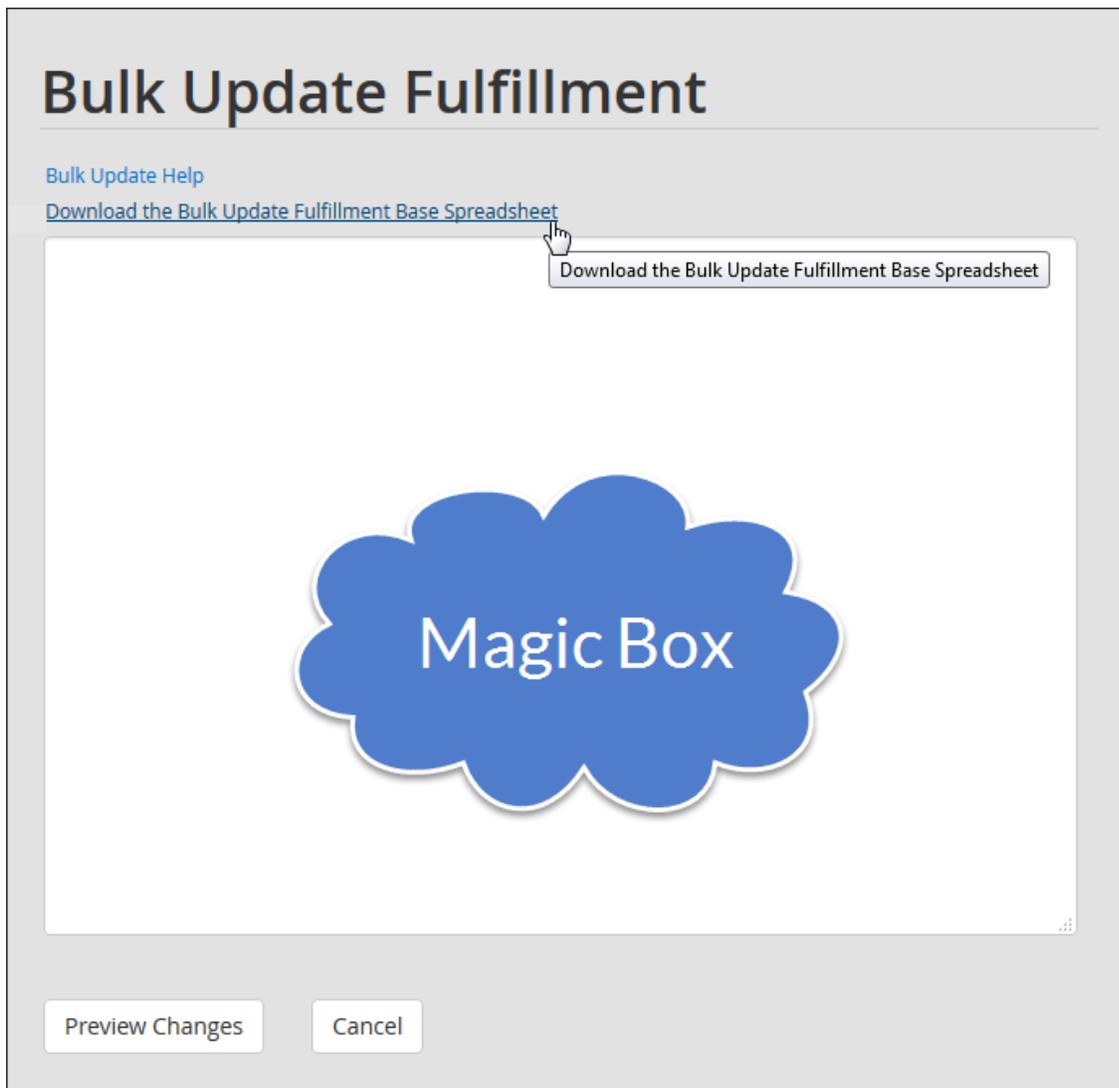
As with many processes in the NI platform, Natural Insight offers administrators the ability to update **Fulfillment** information for assignments in bulk. To access the **Bulk Update Fulfillment** page where you can update fulfillment information in bulk, select the **Bulk Update Fulfillment** option from the **PROJECTS** main menu.



On the **Bulk Update Fulfillment** page, you will see a *Magic Box* where you will enter the **Fulfillment** data per assignment to update. In addition, a *Download the Bulk Update Fulfillment Base Spreadsheet*

link is at the top of the page. This spreadsheet will specify the **Fulfillment** data per assignment to include in the bulk update process. Each row in the spreadsheet represents one shipment/fulfillment. As a result, if an assignment has two or more shipments associated with it, then two rows or more rows - each with the same *Assignment ID* value - will represent these fulfillments/shipments.

If, on the other hand, a shipment contains materials for two or more assignments, then the *Tracking Number* in the *Tracking* column of the row for each of these two or more assignments will be the same.



Steps to Complete the Bulk Update Fulfillment Process

1. Download the **Bulk Update Fulfillment** base spreadsheet (Excel) by clicking the [Download the Bulk Update Fulfillment Base Spreadsheet](#) link.
2. Open the spreadsheet.

	A	B	C	D	E	F	G	H
1	Visit ID	Ship To	Description	Weight	Cost	Fulfilled	Tracking	Carrier
2								
3								
4								

The columns to populate (and their associated values) include:

A. *Visit ID*¹ (required)

Must be a valid *Assignment ID*.

B. *Ship To*

Accepted values:

» *Staff*

» *Location*

¹*Visit ID* refers to the *Assignment ID*, *Call ID*, *Task ID*, etc. - whatever is your company's term for a piece of work within a project in *Natural Insight*.



» *blank*

If you do not enter anything in the *Ship To* column (i.e., you leave the column blank), the *Ship To* value defined for project, or, if that is not defined, the *Ship To* value defined for your NI account in the **Configuration Settings** will be used.

C. *Description*

Description of the fulfillment/shipment.

D. *Weight*

Weight of the fulfillment/shipment.

E. *Cost*

Cost of the fulfillment/shipment.

F. *Fulfilled*¹

Was the shipment (for the assignment indicated by this row) fulfilled/shipped?

» *Yes*» *No*G. *Tracking*

Tracking Number of the fulfillment/shipment

H. *Carrier*

Carrier provider used for the fulfillment/shipment. Current options include:

¹*Fulfilled also means Shipped.*



- » *UPS*
- » *FedEx*
- » *USPS*
- » *DHL US*
- » *DHL Global*
- » *Pilot*
- » *OSM*

3. Enter one assignment per row in the spreadsheet and fill out the fulfillment information for the assignment's shipment in the remaining columns of the row.

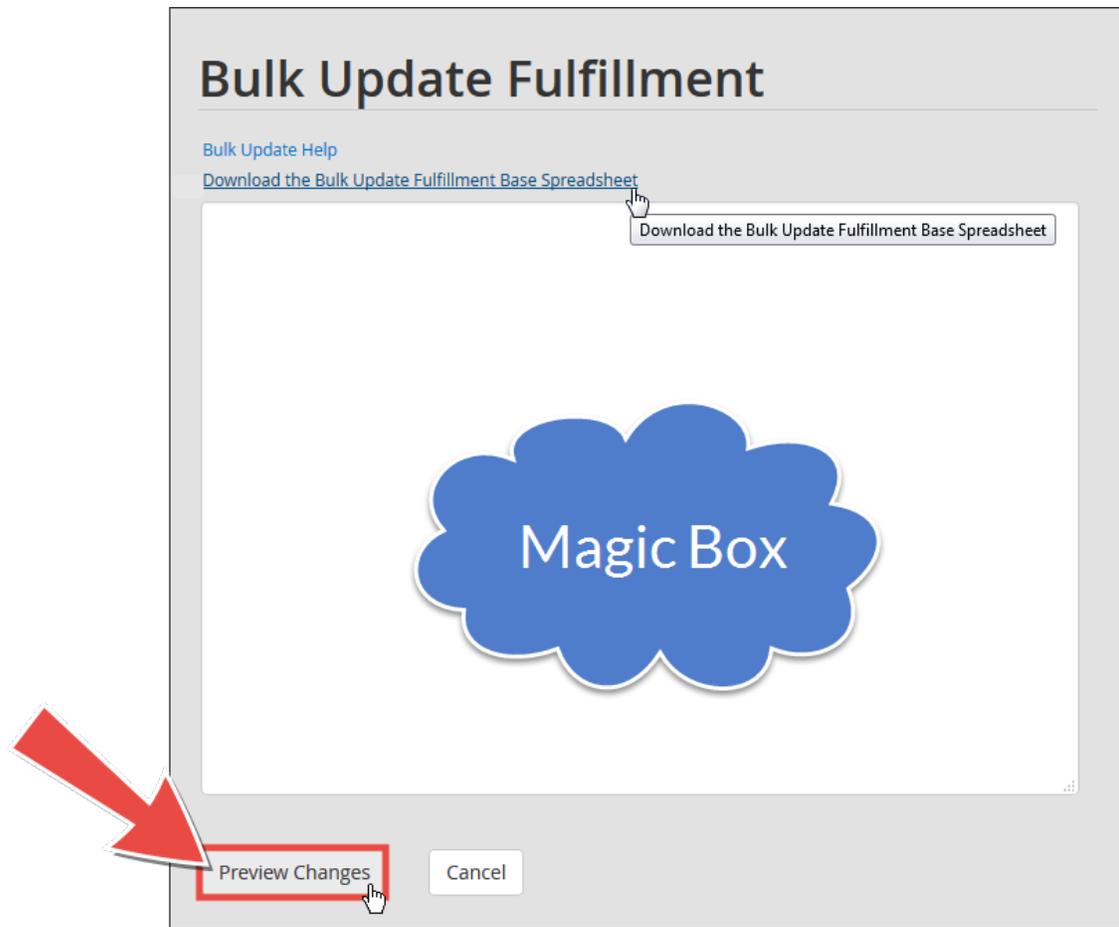


NOTE: If an assignment has more than one shipment, then two rows each with the same *Assignment ID* in the Visit ID column will be entered. However, the other fulfillment fields will be different per row to describe the two different shipments.

4. Once the spreadsheet page is ready, select the entire spreadsheet, copy the contents, then paste the contents in the *Magic Box* on the **Bulk Update Fulfillment** page. You can quickly select all of the spreadsheet data by clicking on the box in the upper left corner where the column and row labels meet (between column A and row 1).



Click the **Preview Changes** button to preview the updates to be made based upon the data entered in the *Magic Box*.



5. Upon clicking the **Preview Changes** button, the **Bulk Update Fulfillment** page validates the information and displays the changes you are planning to make.



EXAMPLE:

For example, in the screenshot below, the *Shipped/Fulfilled* status of 10 assignments will be changed to *No*.



	A	B	C	D	E	F	G	H
1	Visit ID	Ship To	Description	Weight	Cost	Fulfilled	Tracking	Carrier
2	275421					No		
3	275422					No		
4	275423					No		
5	275424					No		
6	275425					No		
7	275426					No		
8	275427					No		
9	275428					No		
10	275429					No		
11	275430					No		

After the spreadsheet data is copied and pasted into the *Magic Box*, the **Preview Changes** interface of the **Bulk Update Fulfillment** page previews the updates to be made to the assignments' fulfillment information.

If the data of a row entered in the *Magic Box* is valid, then the status of this row will have a green checkmark.

Bulk Update Fulfillment

[Bulk Update Help](#)
[Download the Bulk Update Fulfillment Base Spreadsheet](#)

Please review the information below for accuracy before submitting.

Status	Visit ID	Ship To	Description	Weight	Cost	Fulfilled	Tracking	Carrier
✓	275421					No		
✓	275422					No		
✓	275423					No		
✓	275424					No		
✓	275425					No		
✓	275426					No		
✓	275427					No		
✓	275428					No		
✓	275429					No		
✓	275430					No		

If the status of the row on the **Preview Changes** interface of the **Bulk Update Fulfillment** is a green checkmark, the data is valid. If there are errors, the page will show you which row has an error. If you have errors, click the **Cancel** button to cancel the update operation. Correct any errors and repeat the process again until you see green checkmarks in the *Status* column on the **Preview Changes** interface for each assignment to update.



6. Once the data is error-free, click the **Save** button to update the assignments with the indicated fulfillment information. You will see a *Saved successfully* message in red on the **Bulk Update Fulfillment** page indicating the update operation was successful.
7. To view your changes, you can run the **Fulfillment Report** and check the updated **Fulfillment** fields of any edited assignments.



Fulfillment Update Web Service Overview

The **Fulfillment Update Web Service** provides to your organization or to third party fulfillment companies the opportunity to send fulfillment information to Natural Insight through an API. For example, a third-party fulfillment service can send the tracking number and carrier for a shipment of materials required for an assignment. This information is then stored in association with one or more assignments. Natural Insight users can retrieve and, depending on security permissions, update the information.

The **Fulfillment Update Web Service** will create new carrier and tracking number information for an assignment.

Description

Add a fulfillment record in real-time remotely using XML provided by Natural Insight. This import process can be performed at any time and can be triggered by a target third-party system.

Frequency

On-demand

WSDL

You can access the WSDL for the **Fulfillment Update API** at <https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>.

```
<wsdl:definitions xmlns:apachesoap="http://xml.apache.org/xml-soap"
xmlns:impl="http://niWeb" xmlns:intf="http://niWeb"
xmlns:soapenc="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns1="http://rpc.xml.coldfusion"
```



```
xmlns:wSDL="http://schemas.xmlsoap.org/wSDL/"
xmlns:wSDLsoap="http://schemas.xmlsoap.org/wSDL/soap/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" targetNamespace="http://niWeb">

<!-- WSDL created by ColdFusion -->

<wSDL:types>

  <schema xmlns="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://rpc.xml.coldfusion">

    <import namespace="http://xml.apache.org/xml-soap"/>

    <import namespace="http://niWeb"/>

    <import namespace="http://schemas.xmlsoap.org/soap/encoding"/>

    <complexType name="CFCInvocationException">

      <sequence/>

    </complexType>

    <complexType name="QueryBean">

      <sequence>

        <element name="columnList" nillable="true"
          type="impl:ArrayOf_xsd_string"/>

        <element name="data" nillable="true"
          type="impl:ArrayOfArrayOf_xsd_anyType"/>

      </sequence>

    </complexType>

  </schema>

</wSDL:types>
```



```
</complexType>

</schema>

<schema xmlns="http://www.w3.org/2001/XMLSchema"
targetNamespace="http://niWeb">

  <import namespace="http://xml.apache.org/xml-soap"/>

  <import namespace="http://rpc.xml.coldfusion"/>

  <import namespace="http://schemas.xmlsoap.org/soap/encoding"/>

  <complexType name="ArrayOf_xsd_string">

    <complexContent>

      <restriction base="soapenc:Array">

        <attribute ref="soapenc:arrayType" wsdl:arrayType="xsd:string[]"/>

      </restriction>

    </complexContent>

  </complexType>

  <complexType name="ArrayOfArrayOf_xsd_anyType">

    <complexContent>

      <restriction base="soapenc:Array">
```



```
        <attribute ref="soapenc:arrayType"
            wsdl:arrayType="xsd:anyType[][]"/>

    </restriction>

</complexContent>

</complexType>

</schema>

<schema xmlns="http://www.w3.org/2001/XMLSchema"
    targetNamespace="http://xml.apache.org/xml-soap">

    <import namespace="http://niWeb"/>

    <import namespace="http://rpc.xml.coldfusion"/>

    <import namespace="http://schemas.xmlsoap.org/soap/encoding/" />

    <complexType name="mapItem">

        <sequence>

            <element name="key" nillable="true" type="xsd:anyType"/>

            <element name="value" nillable="true" type="xsd:anyType"/>

        </sequence>

    </complexType>

    <complexType name="Map">

        <sequence>
```



```
        <element maxOccurs="unbounded" minOccurs="0" name="item"
            type="apachesoap:mapItem"/>

    </sequence>

</complexType>

</schema>

</wsdl:types>

<wsdl:message name="CFCInvocationException">

    <wsdl:part name="fault" type="tns1:CFCInvocationException"></wsdl:part>

</wsdl:message>

<wsdl:message name="getFulfillmentRequest">

    <wsdl:part name="authCd" type="xsd:anyType"></wsdl:part>

    <wsdl:part name="startDate" type="xsd:anyType"></wsdl:part>

    <wsdl:part name="endDate" type="xsd:anyType"></wsdl:part>

</wsdl:message>

<wsdl:message name="getFulfillmentResponse">

    <wsdl:part name="getFulfillmentReturn" type="xsd:string"></wsdl:part>

</wsdl:message>

<wsdl:portType name="fulfillmentWebService">

    <wsdl:operation name="getFulfillment" parameterOrder="authCd startDate
```



```
        endDate">

        <wsdl:input message="impl:getFulfillmentRequest"
        name="getFulfillmentRequest"></wsdl:input>

        <wsdl:output message="impl:getFulfillmentResponse"
        name="getFulfillmentResponse"></wsdl:output>

        <wsdl:fault message="impl:CFCInvocationException"
        name="CFCInvocationException"></wsdl:fault>

    </wsdl:operation>

</wsdl:portType>

<wsdl:binding name="fulfillmentWebService.cfcSoapBinding"
type="impl:fulfillmentWebService">

    <wsdlsoap:binding style="rpc"
    transport="http://schemas.xmlsoap.org/soap/http"/>

    <wsdl:operation name="getFulfillment">

        <wsdlsoap:operation soapAction=""/>

        <wsdl:input name="getFulfillmentRequest">

            <wsdlsoap:body
            encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
            namespace="http://niWeb" use="encoded"/>

        </wsdl:input>

        <wsdl:output name="getFulfillmentResponse">
```



```
<wsdlsoap:body
  encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
  namespace="http://niWeb" use="encoded"/>

</wsdl:output>

<wsdl:fault name="CFCInvocationException">

  <wsdlsoap:fault
    encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"
    name="CFCInvocationException"
    namespace="http://niWeb" use="encoded"/>

</wsdl:fault>

</wsdl:operation>

</wsdl:binding>

<wsdl:service name="fulfillmentWebServiceService">

  <wsdl:documentation>Report Web service component</wsdl:documentation>

  <wsdl:port binding="impl:fulfillmentWebService.cfcSoapBinding"
    name="fulfillmentWebService.cfc">

    <wsdlsoap:address
      location="http://my.naturalinsight.com/fulfillmentWebService.cfc"/>

  </wsdl:port>

</wsdl:service>

</wsdl:definitions>
```



Fulfillment Update Web Service

Data Descriptions

Access the Fulfillment Update XML-based WSDL at

<https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>.

Tab-Delimited Field Name	XML Attribute	Required?	Data Type	Max Length	Description
n/a	<i>authCd</i>	Required			Authorization code. Obtain from Natural Insight Client Services.
n/a	<i>accessKey</i>	Required			Access Key. This key is unique to each of your clients who will be creating assignments within Natural Insight. As a result, each of your individual clients' accessKeys must be obtained from Natural Insight Client Services.
Assignment ID	<i>visitId</i>	Required	Integer		The assignment ID of the assignment to which the tracking number(s) and carrier information is associated.
Tracking Number	<i>trackingNumber</i>	Required	VARCHAR	255	A single tracking number issued by the <i>carrier</i> to track the shipment of materials for the assignment - such as "1ZX22W7214236136"
Carrier	<i>carrier</i>	Required	VARCHAR	100	The carrier name such as "UPS", "FedEx", "USPS", "DHL US", "DHL Global", "Pilot" or "OSM" used to ship (fulfill) the assignment materials.



Fulfillment Update Web Service

updateFulfillment Method

The Fulfillment Update Web Service can be consumed using either the SOAP protocol or simple HTTP GET/POST requests. The one public method in the web service is: *updateFulfillment*.

Process for Calling the *updateFulfillment* Method

The general process for calling the *updateFulfillment* method is as follows:

1. An NI Administrator at your company requests from Natural Insight Client Services a unique authorization code (*authCd*) for your client instance of Natural Insight to access and employ Natural Insight Web Services.
2. The administrator also requests from Natural Insight Client Services an access key (*accessKey*), which is a custom code created for each client or partner to whom you would like to grant access to the Natural Insight Web Services **Fulfillment Update API** and, thus, give this client/partner the ability to update assignments with fulfillment information within your instance of Natural Insight. In this way, Natural Insight can revoke access to the client/partner to whom you have granted access to the **Fulfillment Update API** upon your request. If you have several clients or partners to whom you would like to grant access to the **Fulfillment Update Web Service**, you will request a unique access key (*accessKey*) for each one.
3. The NI Administrator can reference the Fulfillment Update WSDL at <https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl> in order to examine the parameters of the *updateFulfillment* operation/method.

```
<wsdl:operation name="updateFulfillment" parameterOrder="authCd  
accessKey visitId trackingNumber carrier">
```



4. The client programs code to pass a single fulfillment record's data at a time according to the XML data structure described in the <wsdl:operation> tag of the *updateFulfillment* method.
5. In the code, the client system calls the **Fulfillment Update Web Service's** *updateFulfillment* method passing in the required parameters:
 1. Authorization code as a string (*authCd*)
 2. Access key as a string (*accessKey*)
 3. Other XML assignment parameters for the *updateFulfillment* method:
 - » **Assignment ID** (*visitId*) as an integer
 - » **Tracking number** (*trackingNumber*) as a string (only one trackingNumber per API call)
trackingNumber can be a blank string - "" - if needed.
 - » **Carrier** (*carrier*) as a string

**NOTE:****IMPORTANT NOTES ON XML FULFILLMENT UPDATE PARAMETERS**

- a. The XML assignment parameters passed in for each call to the *updateFulfillment* method will ADD a single fulfillment record at a time for an assignment
- b. The XML assignment parameters are required - i.e. they must be passed in - but may contain empty string values for the optional attributes.
- c. If a single tracking number (*trackingNumber*) identifies a shipment that is associated with more than one assignment, then the





updateFulfillment method must be run with the same *trackingNumber* parameter for each of the associated assignments (*visitId*).

- d. If more than one tracking number - carrier combination should be associated with a single assignment (*visitId*), then the *updateFulfillment* method must be called once per combination. For example, if there are two FedEx shipments for one assignment, two calls to the Fulfillment Update API are made: one for the first FedEx shipment and a second for the second FedEx shipment.

6. If the parameters are valid, Natural Insight attempts to add fulfillment information - tracking number and carrier - to the assignment indicated using the XML parameters provided.

7. If the *updateFulfillment* operation was not successful, potential error messages include:

- » Bad or missing *authCd*:

```
<return>Upload Failed: Authentication Failure.</return>
```

- » Bad or unknown *carrier*:

```
<return>Carrier unknown. Record not processed.</return>
```

- » Bad or unknown *visitId*:

```
<return>Incorrect visitId. Record not processed.</return>
```

- » Data errors: Not returned by the service.



Fulfillment Update Web Service API Summary

URL

<https://my.naturalinsight.com/fulfillmentWebService.cfc>

WSDL

<https://my.naturalinsight.com/fulfillmentWebService.cfc?wsdl>

Method

updateFulfillment

```
<wsdl:operation name="updateFulfillment"
  parameterOrder="authCd accessKey visitId trackingNumber carrier">
```

updateFulfillment Parameters

1. required string *authCd*
2. required string *accessKey*
3. required string *visitId*
4. required string *trackingNumber*
5. required string *carrier*



updateFulfillment Description

The *updateFulfillment* method processes a single import ADD of a fulfillment record associated with an assignment based upon the supplied parameter values.

Potential Error Messages

- » Bad or missing *authCd*.

```
<return>Upload Failed: Authentication Failure.</return>
```

- » Bad or unknown *carrier*.

```
<return>Carrier unknown. Record not processed.</return>
```

- » Bad or unknown *visitId*.

```
<return>Incorrect visitId. Record not processed.</return>
```

- » Data errors: Not returned by the service.



Staff Members Refer to Assignment Fulfillment Info

Staff members have access to **Fulfillment** data - i.e., information such as the *Tracking Number(s)* and *Carrier* for shipments of materials (displays, banners, etc.) - in order to track these shipments, which are frequently required for the successful completion of assignments. Staff members can access **Fulfillment** information in two ways:

1. on an assignment by assignment basis
2. via the Fulfillment Tracking Report.

Staff Member Accesses Fulfillment *Tracking Number(s)* and *Carrier(s)* on an Assignment by Assignment Basis

When a staff member has an assignment scheduled, he or she can check on **Fulfillment** *Tracking Number(s)* and *Carrier(s)* for the assignment on the assignment's **Assignment Info** popup at the top of the *Materials* tab. In this way, the staff member can check on the shipment of materials (such as displays, banners, T-shirts, tasting supplies, etc.) that are necessary for the successful execution of the assignment.



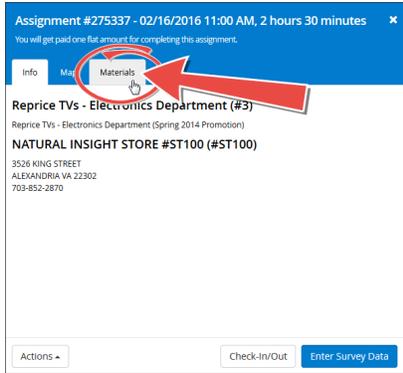
One way to access an assignment's *Materials* tab within the **Assignment Info** popup (and thus any *Tracking Number(s)* for the shipment of materials for the assignment) is to click or tap on the link of the assignment's project name in the *Assignments* pod on the **Home** page.¹

The screenshot shows the Natural Insight user interface. At the top, there is a navigation bar with icons for Home, Resources, Profile, Help, and Sign Off. Below the navigation bar, the user's name "Ann Appleman at Natural Insight" is displayed. The main content area is divided into several sections: Messages (Inbox, Archived), Available Flex Visits (Daily Reset, Continuing Education, Maintenance), and Assignments. The Assignments section has tabs for "Shipping Info" and "Surveys To Go". A table lists assignments with columns for Schedule, Project, Check-in, and Data. A red callout box points to the link "3 - Reprice TVs - Electronics Department (275337)" in the Project column of the table.

Click or tap an assignment's link to display the **Assignment Info** popup for more information about the assignment including **Fulfillment** information at the top of the *Materials* tab.

¹Another way to access an assignment's **Assignment Info** popup is through the staff member's *Calendar*

Clicking or tapping this link brings up the **Assignment Info** popup that displays more information about the assignment. If the staff member clicks or taps the *Materials* tab, the **Materials** page appears.



On the **Materials** page of the **Assignment Info** popup, if **Fulfillment** information is associated with the assignment, one or more *Tracking Number* links display at the top of the page.

A screenshot of the "Materials" tab in the Assignment Info popup. It shows a list of items, each with a tracking number and a description. The first item has the tracking number "231300687629630" and the description "Safeway_Aisle100_Permanent". A red callout box on the left points to the tracking number with the text "Shipment associated with the assignment". A larger red callout box on the right contains the text: "Clicking or tapping on the assignment's Tracking Number link at the top of the Materials tab will open up the Carrier's tracking website (with the shipment's Tracking Number plugged in) in a new browser tab so a staff member can track that particular shipment of materials for the assignment." Below the list are "Actions" and "Check-In/Out" buttons.

Shipment associated with the assignment

Clicking or tapping on the assignment's *Tracking Number* link at the top of the *Materials* tab will open up the *Carrier's* tracking website (with the shipment's *Tracking Number* plugged in) in a new browser tab so a staff member can track that particular shipment of materials for the assignment.



Each link represents a shipment associated with the assignment with its corresponding *Tracking Number* displayed. When a staff member clicks or taps on the shipment's *Tracking Number* link, the website of the *Carrier* of the shipment (such as Fedex or UPS) opens in a new browser tab with the shipment's *Tracking Number* provided behind the scenes so the staff member can track the shipment on the *Carrier's* site.



EXAMPLE:

Let's say an assignment has two shipments listed on the *Materials* tab of its **Assignment Info** popup - one via Fedex and one via UPS.

The screenshot shows an 'Assignment #275337 - 02/16/2016 11:00 AM, 2 hours 30 minutes' popup. The 'Materials' tab is active, displaying a list of items. A red box highlights the tracking numbers 'C4-J4S85H-02-940389435' and '1Z12345E0291980793'. Another red box points to the list of materials, including 'Safeway_Aisle100_Permanent', 'Safeway_Aisle200_Permanent', 'Safeway_Aisle300_Permanent', 'Safeway_Aisle400_Permanent', 'Safeway_Aisle500_Permanent', 'Safeway_EndCap100_Permanent', and 'Safeway_EndCap200_Permanent'. The popup also includes 'Info', 'Map', and 'Materials' tabs, and buttons for 'Actions', 'Check-in/Out', and 'Enter Survey Data'.

If the staff member taps or clicks on the Fedex *Tracking Number* link, the Fedex site opens in the a new browser tab with the following URL:

```
https://www.fedex.com/apps/
fedextrack/?action=track&action=track&tracknumbers=C4-J4S85H-02-940389435
```

On this page of the Fedex website (the **FedEx Tracking** page - aka the **Track the way you want** page - at <https://www.fedex.com/apps/fedextrack/>), a staff member can track the status he assignment's shipment with the associated *Tracking Number* (C4-





J4S85H-02-940389435) or a obtain a proof of delivery based upon the *Tracking Number* of the shipment.

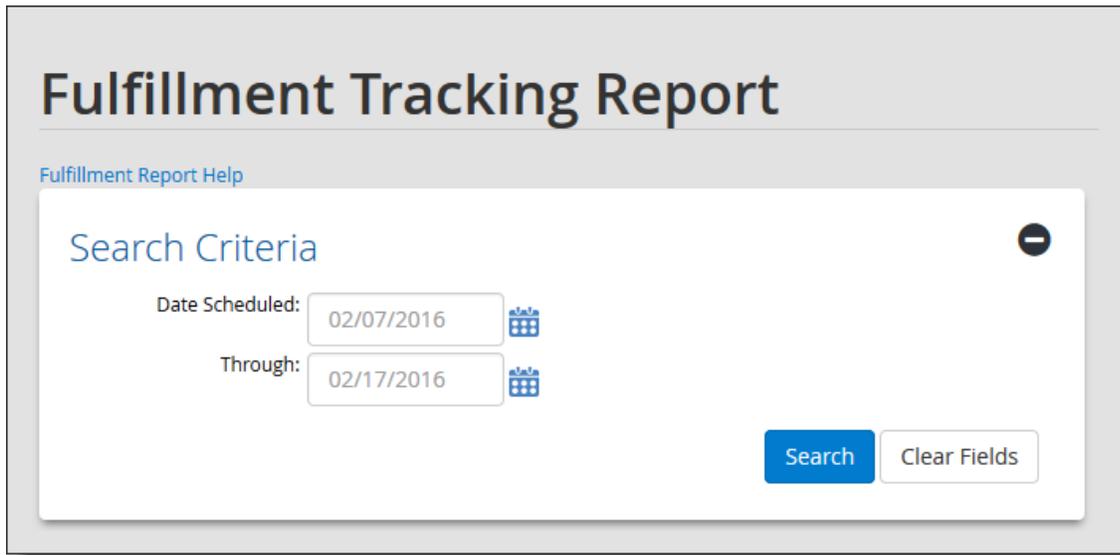
The same process happens when the staff member clicks or taps on the *UPS Tracking Number* link with an equivalent **Track your Package** page on the UPS website (similar to the one on the Fedex site) opening up in a new browser tab with the shipment's associated *Tracking Number* displayed.

Staff Member Accesses Fulfillment Info via the Fulfillment Tracking Report

The Fulfillment Tracking Report is accessible by clicking or tapping the **Shipping Info** button on the *Assignments* pod of the **Home** page.



The **Fulfillment Tracking Report** will load a listing of assignments with a *Schedule Date & Time* falling within the range of 3 days in the past and 7 days in the future from today.¹ Thus, the report's default *Search Criteria* has a start date of 3 days in the past from today and an end date of 7 days in the future from today.



The screenshot shows a web interface for the "Fulfillment Tracking Report". At the top, there is a "Fulfillment Report Help" link. Below it is a "Search Criteria" section with a close button (minus sign). The form contains two date fields: "Date Scheduled:" with the value "02/07/2016" and "Through:" with the value "02/17/2016". Both fields have calendar icons to their right. At the bottom right of the form are two buttons: "Search" (blue) and "Clear Fields" (white with blue border).

The start and end date fields in the date range *Search Criteria* are editable in case you want to show results within a wider or narrower date range.

Each row in the *Search Results* pod of the report represents an assignment with which at least one shipment (fulfillment) is associated. An assignment's **Fulfillment** information is provided via columns.

¹The date range of 3 days in the past and 7 days in the future from today is the same as the date range of assignments displayed in the *Assignments* pod.

Fulfillment Tracking Report Columns

The columns are in the following order:

Assignment ID	Tracking	Scheduled DateTime	Ship To	Location ID	Location Name (Location Number)	Location Address	Location City	Location State/Province	Location Postal Code
275337	http://wwwapps.ups.com/WebTracking/track?trackyes&trackNums=1Z12345E0291980703 http://www.fedex.com/Tracking?action=track&tracknumbers=C4-J4S85H-02-940389435	02/16/2016 11:00 AM	Staff	ST100	NATURAL INSIGHT STORE #ST100 (100)	3526 KING STREET	ALEXANDRIA VA		22302

A. *Assignment ID*

The blue *Assignment ID* in the **Fulfillment Tracking Report** is actually a link that, when clicked, opens the **Assignment Info** popup for the clicked assignment.

B. *Tracking*- The assignment's shipments' *Tracking Number(s)* plus *Carrier* in the form of a URL link

One *Tracking Number* is placed per line in the following general format: a URL link to the shipment *Carrier's* tracking website (e.g. Fedex or UPS) with the shipment's *Tracking Number* appended to the end of the URL. Clicking the URL link will open a new browser tab with the *Carrier* website's tracking page processing the shipment's *Tracking Number*.



EXAMPLE:

```
https://www.fedex.com/apps/
fedextrack/?action=track&action=track&tracknumbers=C4-J4S85H-02-940389435
```

C. *Scheduled Date/Time* - The date and time the staff member scheduled on his/her **Calendar** to perform the assignment



D. *Ship To*- Where the shipment should ship to

» *Staff*- Shipment(s) to be shipped to staff member

» *Location* - Shipment(s) to be shipped to location

» blank - Either the project or account-level *Ship To* default used, whichever takes precedence

E. *Location ID*

F. *Location Name (Location Number)*

G. *Location Address (Location Street Address)*

H. *Location City*

I. *Location State/ Province*

J. *Location Postal Code*

