



Listrak Self-Service: Advanced Retail Segmentation

SOLUTION DEFINITION:

Advanced Retail Segmentation (ARS) is a data-sync solution that provides you with insight into the behavioral and purchasing patterns of your customers.

YOUR RESPONSIBILITIES:

Integration:

- Integrate your website with Listrak's platform, if this step has not already been completed for an existing Listrak solution, in accordance with integration guides provided by Listrak
- Format and send required incremental data feeds for customers, orders, order items, and products.
 - *This is not required for Listrak module integrations including: Magento 1 & 2, Salesforce Commerce Cloud, Shopify and BigCommerce.*
- (Optional but strongly encouraged) Perform a one-time historical purchase data import, typically with 2-3 years of order data.
 - Without historical data, your segmentation data will be initially limited to current activity only

Application Setup, including the following:

- Setup your Listrak platform account utilizing Thrive, Listrak's learning management system to include:
 - Configuration of your solution settings
 - Generation of customized of segmentation filters based on your data and predefined segmentation fields that are available with the solution

Quality Control

- Utilize and complete provided verification checklists to test the integration and solution for functionality and accuracy in accordance with how the solution is expected to perform

LISTRAK'S RESPONSIBILITIES:

Integration Guidance:

- Provide information required to integrate your website with Listrak's platform, if this step has not already been completed for an existing Listrak solution, in accordance with Listrak's integration guides
- Provide information to format and send required incremental data feeds for customers, orders, order items, and products.
 - *This is not required for Listrak module integrations including: Magento 1 & 2, Salesforce Commerce Cloud, Shopify and BigCommerce*
- Dynamically synchronize your available customer data to include the following data points:
 - Customer flag
 - Order count
 - Average number of reorder days
 - Last, first, and projected order date
 - Spent one (1), two (2) or three (3) year
 - Spent total
 - Recent items purchased
 - Average order value
 - Brand
 - Category

- Last browsed: brand, category and subcategory
- Last site visit
- Most browsed brand, category and subcategory
- Recent items: browsed and browsed overflow
- Meta Fields: up to five (5) additional meta information fields

Application Setup, including the following:

- Setup your merchant within the Listrak platform
- Enable all necessary settings for access to Thrive, Listrak's learning management system
- Generate the necessary list and segmentation fields for the solution
- Ongoing release notes and educational articles through Listrak's Knowledge Base

Quality Control

- Provide quality testing checklists for setup verification and pre-deployment testing for you to complete
- Up to two (2) rounds of testing for functionality and accuracy, in accordance with how solution is expected to perform

OUT-OF-SCOPE:

- **Additional Solution Functionality Testing:** Testing and troubleshooting of technical integration beyond the two (2) included rounds of verification may incur Professional Service fees at the prevailing billable rate. If troubleshooting requires the assistance/participation of a Listrak Developer, the same billable rate may apply.
- **Updates/Break-Fix:** If you modify an email's original HTML (as provided by Listrak), your website, or eCommerce platform/provider in any way that would affect the solution or any technical integrations with Listrak, necessary Professional Service fees may be charged at the prevailing billable rate to troubleshoot and resolve resulting issues. The same applies to client-caused break-fix scenarios within the Listrak application.
- Any changes to the solution scope as provided from Listrak may require a statement of work and additional investment. A custom scope definition will be provided in a separate document for your review.
- **Any feature or functionality not expressly addressed in this scope document is considered out-of-scope by default.**

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