Listrak Self-Service: Post Purchase Series

SOLUTION DESCRIPTION:
Listrak's Post Purchase Series solution will automatically deploy messages to customers after a purchase has been completed or shipped.

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)* For messaging that will be triggered after ship date, you will supply "ship date" or "status" indicating a status change of shipped or completed.

Application Setup, including the following:
- Setup your Listrak platform account utilizing Thrive, Listrak's learning management system to include:
  - Configuration of your solution settings
  - Generate the necessary external events and segmentation fields for the solution
  - Setup the necessary Listrak Conductor Conversation to automatically deploy your messaging
- Set-up may be required for the Listrak Recommendations solution investment, including:
  - Creation of solution Merchandise Blocks (within the Listrak Recommendations Engine)
  - Creation of solution Recipes (within the Listrak Recommendations Engine)

Content & Creative:
- You should analyze your customers' purchasing behavior to determine which points in the customer life cycle have the highest potential for re-engagement.
- Write, design, code, and implement all messages for your solution using Listrak HTML editor or your preferred HTML builder.
  - *Listrak Composer is not available for use with Contact Content Blocks (CCB) which house lines of code.*
- If the Listrak Recommendations Solution investment has been made, you will insert product recommendations into the message.

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*

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, external events and segmentation fields for the solution
- Ongoing release notes and educational articles through Listrak's Knowledge Base

Content & Creative:
- Provide template options for your messaging will be available for use within our in-platform email builder, Listrak Composer.

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.**

DOCUMENT CONTROL				
Document Title: Scope_Self-Service – Post Purchase_v1.0				
Version Number	1.0		Authors/Job Title	Paula Spirawk - BSA
Date Approved	6.15.2017		Document Status	Final
Effective Date	6.30.2017		Approved By	LPS Directors
Superseded Version	n/a		Date of Next Review	12.31.2017
VERSION CONTROL				
Version	**Author**	**Date**	**Changes**	
1.0	Paula Spirawk	6.01.2017	Layout and language update; definition	