

KLAVIYO INTEGRATION

A customer support & data guide

Loyalty, wired into Klaviyo.

ethos turns your customers into a community built around your brand. Loyalty, Referrals, UGC, Contests, and Surveys turn your customers into members and members into repeat buyers — creating engagement data Klaviyo can act on across profiles, flows, segments, and campaigns.

ONE PLATFORM, ENDLESS WAYS TO KEEP MEMBERS COMING BACK

Loyalty & rewards

Referrals

UGC

Contests

Surveys

Early access

Exclusive products

Member events

A loyalty platform that turns customers into community.

Members earn points, unlock rewards, refer friends, share content, enter contests, and answer surveys. Every one of those interactions becomes data — and ethos hands it to Klaviyo so your marketing can act on who your best customers really are.



Loyalty

Points, tiers, and rewards that give customers a reason to keep coming back.



Referrals

Members invite friends — and both sides get rewarded when they join.



UGC

Reward photos, reviews, and social posts from the customers who love you.



Contests

Run giveaways and challenges that turn everyday shoppers into fans.



Surveys

Zero-party data members are happy to share — preferences and feedback.



Member perks

Early access to sales, exclusive products, and members-only events.

WHY IT MATTERS FOR KLAVIYO

Engagement that used to be invisible becomes structured data on the profile — ready to use across every Klaviyo surface.

Profiles

Flows

Segments

Campaigns

From install to insight.

Six steps: get ethos connected, publish your loyalty pages, switch on the Klaviyo flows, and understand exactly what data moves between the two platforms.

01 Install ethos from Klaviyo

02 Connect your Shopify store

03 Set up your loyalty program

04 Publish your loyalty pages

05 Set up event triggers in the Communication Center

06 What data flows in & out of Klaviyo

REQUIRED · KLAVIYO ACCOUNT

An active Klaviyo account with permission to install apps from the marketplace.

REQUIRED · SHOPIFY STORE

A store on an Online Store 2.0 theme (Dawn, or any theme released since 2021).

REQUIRED · CUSTOMER ACCOUNTS

Shopify customer accounts enabled, so members have somewhere to log in.

Need a hand at any point? Reach out at clients@heyethos.com.

Get ethos connected.

Install from Klaviyo, connect your Shopify store, and set up your loyalty program. After that, you can switch on event triggers to use Klaviyo to its fullest.

1 Install ethos from Klaviyo's marketplace.

Find ethos in the Klaviyo App Marketplace and click Install. You'll be asked to authorize the connection — this creates the secure link between your Klaviyo account and ethos.



ethos

Loyalty & Rewards

Launch a premium loyalty program: Points, Contests, UGC + more.

Install

2 Connect your Shopify account.

Link the Shopify store where your customers shop. This keeps member profiles, orders, and loyalty activity in sync across ethos, Shopify, and Klaviyo.

CONNECTION

ethos



Shopify

Connect store

3 Set up your loyalty program.

In the ethos portal, configure your tiers, points, ways to earn, and rewards. Everything you set here flows into your storefront and into Klaviyo automatically.

THE SUNNY CLUB · TIERS

Insider

0 pts

VIP

500 pts

Elite

1,500 pts

WHAT'S NEXT

With ethos connected, publish your loyalty pages on Shopify (Step 04), then switch on the Klaviyo event triggers that power your flows (Step 05).

Publish your loyalty pages.

ethos adds loyalty blocks to your Shopify theme. You'll build two pages — a landing page that welcomes non-members, and a member page that becomes home base after they join.

LANDING PAGE · FOR NON-MEMBERS

Welcomes new visitors

Hero with a clear Join CTA, member benefits, how it works, and a snapshot of the rewards inside.

MEMBER PAGE · FOR SIGNED-IN MEMBERS

Their home after sign-in

Tier & points balance, ways to earn, offers, challenges, and event invitations.

1 Turn on the app embed.

Online Store → Themes → Customize on your live theme. Click the App embeds icon, toggle ethos on, and Save. Without this, no loyalty block will work.

2 Create two templates.

In the theme editor, create a **loyalty-landing** template and a **loyalty-member** template, both based on Default page. They start empty — you'll fill them next.

3 Create the two pages.

Online Store → Pages → Add page. Title them what customers will see (e.g. **Rewards** and **My Rewards**), leave the content empty, and assign each its template.

4 Build the landing page.

On the loyalty-landing page, Add section → Apps and drop in ethos blocks. **Landing: Join/Login** is the only required block; the rest of the page is yours to design.

Connect, build, and launch.

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DON'T SKIP THIS

Connect Join/Login to the member page.

Open the Landing: Join/Login block, find the **Membership page** field, and choose the page using your loyalty-member template. Skip it and new members get stranded on the landing page instead of their dashboard.

REQUIRED: MEMBERSHIP PAGE

Loyalty Member



Members are redirected here after they join.

6

Build the member page.

On the loyalty-member page, add **Benefit: Your Points** (required), **Earn Points** (required), and **Benefits** (strongly recommended). Content and order are managed in the ethos portal.

7

Test the full flow.

In an incognito window, go to your landing page, click Join, and create a test account. Confirm you're taken straight to the member page and that Your Points shows a balance (0 is fine).

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Add it to your navigation.

Online Store → Navigation → Main menu → Add menu item, linked to your landing page. Until your loyalty page is in the menu, customers can't find it — this is how the program goes live.

Want the full walkthrough — every block, template, and troubleshooting tip? See the standalone **ethos Shopify setup guide**.

Switch on your Klaviyo flows.

ethos fires a loyalty event to Klaviyo for every meaningful moment in a member's journey. Open the Communication Center in the ethos portal and activate the events you want to act on.

01 Activate the event Switch it Active and set it to trigger via Klaviyo.	02 Send a Trigger Example This registers it as a metric in Klaviyo.	03 Build the flow in Klaviyo Use that metric as the flow trigger.
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Communication Center

Klaviyo flows

New Member First-time joining <input type="checkbox"/>	Happy Birthday On the member's birthday <input checked="" type="checkbox"/>
Moving Down a Tier Tier moves down <input type="checkbox"/>	Moving Up a Tier Tier moves up <input checked="" type="checkbox"/>
Points Earned Earns points on a purchase <input checked="" type="checkbox"/>	Referral Completed Refers a friend to the program <input checked="" type="checkbox"/>
Referred a Friend Claim Friend joins & earns points <input checked="" type="checkbox"/>	Reward Redeemed Redeems points for a voucher <input checked="" type="checkbox"/>
Shop Link Used Member's Shop Link is used <input type="checkbox"/>	Shopify Store Friend Referral Discount sent to referred person <input checked="" type="checkbox"/>
Shopify Store Friend Referral Complete Referred friend checks out <input checked="" type="checkbox"/>	

DON'T FORGET THE TRIGGER EXAMPLE
Send a Trigger Example for each event once. That registers it as a metric in Klaviyo so it shows up in the flow builder — until you do, Klaviyo can't see the event.

WANT ANOTHER EVENT TRIGGER?
Tell us what you'd like to act on at clients@heyethos.com and we'll look at adding it.

Events, variables & timing.

Every event ethos can send to Klaviyo, the metric name it arrives as, the variables available inside it, and when it fires. In your Klaviyo flow templates, reference each variable wrapped in double curly braces.

EVENT & KLAVIYO METRIC	EVENT VARIABLES	TIMING
New member ethos – New Member First-time joining	event.tier_name event.starting_points	Immediate
Happy Birthday ethos – Member Happy Birthday Birthday email	event.birthday_points_awarded	On member's birthday
Moving Down a Tier ethos – Membership Tier Change Down Tier moves down	event.new_tier_name event.previous_tier_name	Immediate
Moving Up a Tier ethos – Membership Tier Change Up Tier moves up	event.new_tier_name event.previous_tier_name	Immediate
Points Earned ethos – Points Added to Member Account Earns points on a purchase	event.points_added	When points are earned
Referral Completed ethos – Referral Complete Refers a friend to the program	event.bonus_points event.referred_user_name	Immediate
Referred a Friend Claim ethos – Referral Friend Claimed Friend joins & earns points	event.bonus_points event.referrer_name	Immediate
Reward Redeemed ethos – Reward Redeemed Redeems points for a voucher	event.reward_details event.points_balance	Immediate
Shop Link Used ethos – Shop Referral Used Member's Shop Link is used	event.points_balance event.earned_points	Immediate
Shopify Store Friend Referral ethos – Referral Program Invite Discount sent to referred person	event.referring_user_email event.discount_code event.discount_amount event.store_link	Immediate
Shopify Store Friend Referral Complete ethos – Referral Program Complete Referred friend checks out	event.discount_code event.discount_amount event.store_link	Immediate

What ethos sends to Klaviyo.


Everything below is keyed to the member's email and written onto their Klaviyo profile, so your team can segment and message on real loyalty behavior.

ethos → Klaviyo		SENT
Member identity	The member's email address — used to find or create the matching Klaviyo profile.	
Loyalty profile properties	<p>Written onto the profile so you can segment on loyalty: tier ID + name, points balance, redeemable points, ethos membership ID, birthday (if provided), and membership status.</p> <p> <code>ethos_tier_name</code> <code>ethos_points</code> <code>ethos_redeemable_points</code> <code>ethos_membership_id</code> <code>ethos_status</code> all prefixed <code>ethos_*</code> </p>	
Loyalty events	<p>Activity tied to the member's email — these power your Klaviyo flows.</p> <p> Points Added Tier Change Up / Down Reward Redeemed Happy Birthday Referral Invite / Complete Membership Expired New Member Registration Welcome Redemption Reminder </p>	
Email subscription (consent)	When a member opts in via the "Join Mailing List" way-to-earn, we subscribe their email to the brand's list with the consent timestamp.	
Lists & segments	We create a mailing list and loyalty segments. Segment definitions reference only the <code>ethos_*</code> properties — no member data is bundled in.	

What we receive – and what we never touch.

Klaviyo → ethos		RECEIVED
Account info (install only)	Klaviyo account ID, organization name, contact email, and website URL – used to identify the brand and link the connection.	
OAuth tokens	Connection credentials, stored securely against the brand's ethos workspace.	
Product reviews	Read periodically so reviewing members earn loyalty points.	

Never exchanged	
✗ No payment or card data	✗ No order details
✗ No passwords	✗ Klaviyo never receives ethos credentials
✗ We never pull member lists wholesale – only what's listed in this guide	

 **Secure by default**

All traffic is HTTPS to Klaviyo's official API. On disconnect or uninstall, tokens are deactivated and all syncing stops.

YOU'RE CONNECTED

You're live. Welcome to ethos!

Your loyalty program is now feeding Klaviyo. As members earn, refer, redeem, and level up, that activity lands on their profile — ready for your next flow, segment, and campaign.

Profiles

Loyalty properties on every member.

Flows

Triggered by real loyalty events.

Segments

Built on tiers, points, and status.

NEED A HAND?

clients@heyethos.com

We love hearing how it's going.

The logo for 'ethos' is displayed in white lowercase letters on a blue background. Above the text is a stylized blue smiley face icon consisting of a curved line for a mouth and a semi-circle above it for a forehead.

ethos