

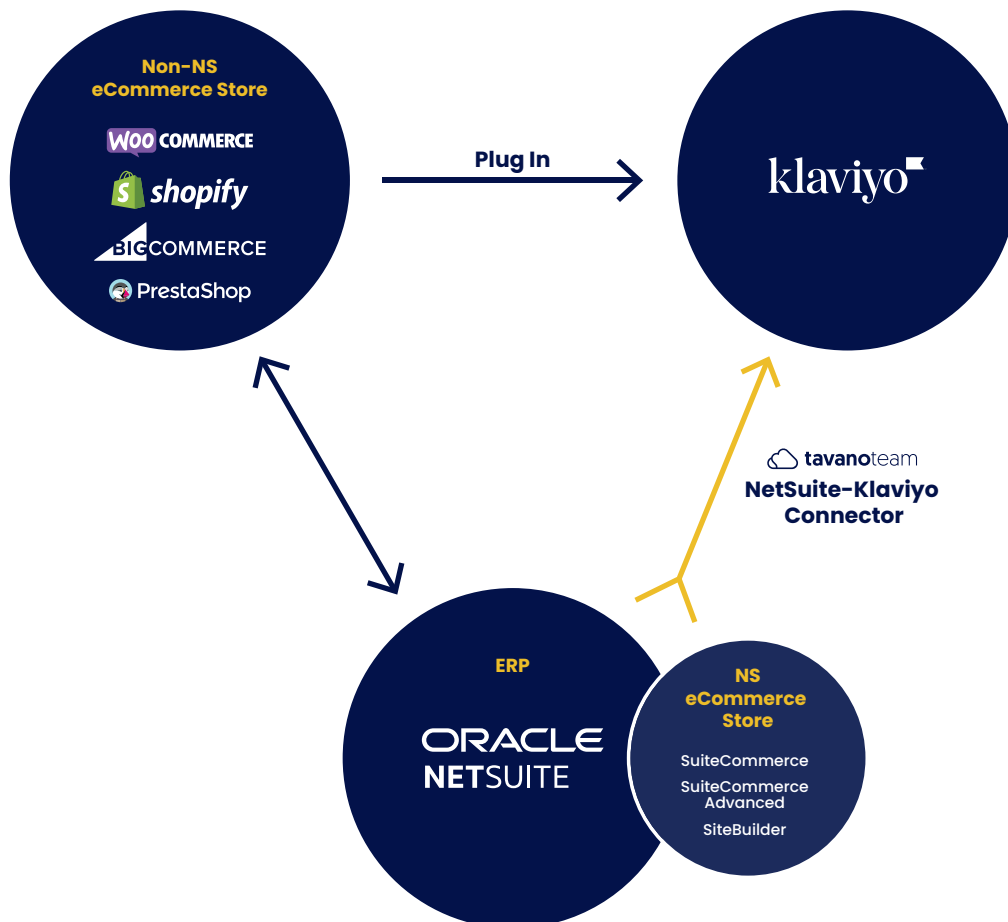
NETSUITE – KLAVIYO CONNECTOR FULL SCOPE

Table of contents

Introduction	01
Minimum Requirements	02
What's Included?	04
Limitations	12
What's not Included?	14
Important note	16

NetSuite-Klaviyo connector

With the power of NetSuite-Klaviyo connector, you can sync your NetSuite eCommerce customers' activities into Klaviyo deeply and seamlessly to quickly analyze and act based on insights to grow your business exponentially.



Minimum Requirements

- NetSuite account access with administrator role.
- NetSuite SuiteCommerce or SuiteCommerce Advanced (For SC Website tracking events)
- Google tag manager account access with administrator permissions. (For SC Website tracking events)
- Klaviyo account access.

What's Included?

NetSuite-Klaviyo connector installation and initial configurations

- **NetSuite-Klaviyo connector bundle installation.**
 - Creation of custom record to define specific Klaviyo configurations in NetSuite end.
 - Creation of specific NetSuite-Klaviyo connector saved searches to handle item, customer, and order data feed sync to Klaviyo.
- **Klaviyo's standard tracking events (*) upload into the store's Google Tag Manager (GTM) account.**
 - If there is no existing Google Tag Manager account associated with your NetSuite SuiteCommerce or SuiteCommerce Advanced store, then we will create one for you.
- **Initial scheduling time setup for item's catalog source.**
 - Schedule feed completion time will depend on the number of items and customer data to be processed.
 - We strongly recommend programming these schedules on a time that meets the following: less NS backend-scripts execution and less site's orders processing time.
- **Klaviyo's catalog source synchronization with NetSuite ERP catalog's setup.**

(*) Klaviyo's standard tracking events:

SuiteCommerce: triggered only once a user is logged in on NetSuite SC/SCA ecommerce site.

- **Active on Site/Identify** - When someone visits your website
- **Viewed Product** - When someone views a product
- **Added to Cart** - When someone adds an item to their cart
- **Started Checkout** - When someone lands on the checkout page

NetSuite ERP: triggered from NetSuite ERP backend

- **Order Completed** - When an order successfully processes on your system (Includes Sales Orders, Invoices, and Cash Sales)
- **Ordered Product** - An event for each item in a processed order
- **Fulfilled Order** - When an order is sent to the customer
- **[coming soon] Cancelled Order** - When a customer cancels their order
- **[coming soon] Refunded Order** - When a customer's order is refunded

(*) NetSuite-Klaviyo's connector saved searches (NetSuite ERP):

Pre-promoted fields of NetSuite-Klaviyo connector's bundle saved searches are mandatory. If any of the mentioned fields are removed, the connector will stop working properly:

- **Items and Orders:** name, description, type, available, internal id, parent:matrix item, parent, parent:type, base price [*], matrix item.
 - [*] base price = global price defined for your NetSuite SuiteCommerce or SuiteCommerce Advanced store.
- **Customers and Contacts:** name, email, last name, phone, mobile phone, netsuite global subscription status, price level.

NetSuite > Klaviyo catalog feed, item, customer, and order data sync

- Sync NetSuite Individuals, Companies, Contacts, Leads and Prospects data to Klaviyo.
- Sync NetSuite Items data to Klaviyo.
- Sync NetSuite Orders data to Klaviyo.
- Lead and Customer generation sync in real-time NetSuite > Klaviyo. Data included: email, name, last name, phone, mobile phone, netsuite global subscription status, price level.
- Order data in real-time NetSuite > Klaviyo. Data included: transaction item options, transaction column, and transaction body fields.
- Items' catalog source generation, NO real-time.
- Item types available: inventory and non-inventory items, matrix, assembly, and kit items.
- Items' name, id, price, description and url data is mandatory for catalog source files generation to get the items synced correctly in Klaviyo.

- NetSuite ERP Catalog source files folder creation to host item's data json files.
- Unlimited amount of items for catalog source sync.
- Flexibility to expose NetSuite custom field/attributes data to Klaviyo.
 - Additional field mapping is optional and available to do it right away for customers, orders and items data by editing NetSuite-Klaviyo connector's bundle saved searches. (A NetSuite administrator role account member can achieve this).
- Possibility to configure specific NetSuite matrix item options to include the matrix child item's image based on the selected option as part of the data sync. (A NetSuite administrator role account member can achieve this).
- Item images data will be pulled from the image folder configured for your NetSuite SuiteCommerce or SuiteCommerce Advanced store.
- Flexibility to transfer data fields to Klaviyo as 'id' or 'text' value per line.
- Import of customer's transactional history data from NetSuite to Klaviyo up to 5 years of data available maximum.

Klaviyo's Sign up form integration in NetSuite store

- Real-time display of LIVE-Published Klaviyo's "Sign up forms." Pop-up and flyout form types are the ones available by default. Behavior of forms handled within Klaviyo's account.
- Klaviyo's account will be the source of truth for subscribers' opt in/out status.

NetSuite-Klaviyo integration support

Dedicated support team to cover the main configuration aspects based on your NetSuite eCommerce:

- NetSuite additional field/attributes data configuration for customer, orders and/or items.
- NetSuite specific matrix item options configuration.

Limitations

- One NetSuite-Klaviyo Connector licence per website/domain record.
- Data synchronization is from NetSuite to Klaviyo. No data is sent from Klaviyo to NetSuite.
- Components of Assembly and Kit Items are not synchronised into Klaviyo's data. The Assembly and Kit item itself does.
- If an item, lead/customer, order data is created/updated on the Klaviyo's account manually, it should be created in NetSuite ERP as well to keep data consistent. NetSuite ERP needs to be the data source of truth.
- Klaviyo's "Sign up forms" registered emails will not be created in NetSuite ERP. By default the only lead/customers that are going to be registered in NetSuite and then sync into Klaviyo will be: SuiteCommerce Newsletter, SuiteCommerce new customer registrations, leads/customers registered directly on NetSuite ERP side.
- Klaviyo "Sign up forms" embedded type are not displayed automatically. To add this kind of form into your site development work is needed to include it as part of your site's theme code.

What's not Included?

- Klaviyo's flows, configurations, email templates creation, sign-up forms creation.
- Additional Klaviyo's tracking events creation.
- NetSuite-Klaviyo connector's additional events' data.
- Klaviyo "Sign up forms" embedded type integration on site.

Need additional events or help with
your Email Marketing strategies?

We can make it happen.

**ASK FOR OUR EXTENDED
NETSUITE-KLAVIYO SERVICES.**

Important Note:

We recommend all action items be executed in a NetSuite Sandbox account and a Klaviyo dev account.

After Tavano Team completes the integration, configuration, and basic testing, you will need to test the connector yourself and give us the green light to move it to your live environment.

The scope of work included in this proposal supports native NetSuite functionality only. Additional efforts may be required if any functionality involved has been customized. These efforts have not been included as part of this scope and will need to be evaluated and quoted separately.

Thank you!

