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Customer Purchase Metrics Integration Requirements

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# Overview

Implementing Listrak Customer Purchase Metrics is the first step in building stronger relationships with your customers that are purchasing from your online store. With Customer Purchase Metrics, re-engagement campaigns, RFM scoring and the usage of discount ladders becomes a seamless process within the Listrak application.

The integration process involves placing code snippets on your site to track visitors arriving at your site from email campaigns. Additionally, code on the order confirmation page will send basic order data to Listrak for processing and analysis. To get started, we’ll need several years of order history data to analyze and identify shopping patterns. **Also, to ensure 100% coverage of order history data, we recommend sending daily order history files via FTP to ensure we know an entire customer’s purchase history.**

## Step 1: Order History Files

To generate the most accurate Customer Purchase Metrics, it is advised that you create order history files that go back as far as possible. If you cannot provide at least two to five years of order history, the ability of our system to identify trends will be greatly reduced. The format of the data sent via FTP is four separate files: products, orders, items and customers. Each of these files will allow us to properly process your order history and create the most accurate Customer Purchase Metrics profile fields in your Listrak account.

1. **Products** – product catalog data
2. **Orders** – complete available order history
3. **Order Items** – complete history of items ordered
4. **Customers** – all customers reflected in the order history data files

### Formatting Requirements

To ensure proper processing of import files, there are several requirements that are imposed during processing. These requirements are:

* Accepted file format (.xlsx, .csv or .txt)
* Accepted encoding (UTF-7, ASCII, UTF-8, or Unicode)
* Header column definition row
* Required columns must be included
* Remove all carriage returns (CR) / line feeds (LF, CRLF) from column data in plain text files
* Use text-qualifiers when necessary

### File Extensions

File formats are flexible and allow for mapping of columns to Fusion Apps properties. The accepted file formats are:

* Microsoft Excel 2007 and later (.xlsx)
* Plain delimited text (.txt)
* Comma separated values (.csv)

### FTP Setup

The information necessary to upload files is as follows:

* Server: [ftp.listrakbi.com](ftp://ftp.listrakbi.com)
* Port: 21
* Username: <<FtpUsername>>
* Password: <<FtpPassword>>

### Upload Schedule

As mentioned, you may upload files as often as you need. There is no need, however, to upload the same data more than once. For example, you may want to upload an entire product file every day, but you only need to upload customer information when it is changed in your database.

If you are only uploading changes, it is important to append to files that already exist. This is typically not an issue as files are imported as soon as they arrive, but there is a simple FTP command to ensure data is appended rather than overwritten.

Please inform your account/project manager of your upload schedule so that we can put triggers in place to notify us in the event of a lapse in upload timing.

### File Names

The Listrak Fusion Apps import process has predetermined filenames that it will import automatically, but you may upload any file given you provide the filenames to your account/project manager. The filenames that will be imported by default are:

* orders.txt / orders.xlsx
* orderitems.txt / orderitems.xlsx
* customers.txt / customers.xlsx
* products.txt / products.xlsx

If you cannot change the name of the files prior to FTP upload, please contact your account/project manager to ensure your account is configured to accept your files.

## File Specifications

The following information explains all of the various data fields contained within the import files. The first column shows the default header column name when imported. Some fields are required the first time a record is uploaded (e.g. order placed) and optional on subsequent updates (e.g. order status updates).

### Orders

The orders file contains basic information about a completed purchase like: order number, total and date. The accepted data fields for orders are:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Header Name | Data Type | Description | Required (First Time) | Required (Update) |
| Email | Alphanumeric | Email address of customer | Y | N |
| OrderNumber | Alphanumeric | Unique order number | Y | Y |
| DateEntered | Datetime | Timestamp of order date | Y | N |
| OrderTotal | Decimal | Total value of the order (remove currency symbols like $, £) | Y | N |
| ItemTotal | Decimal | Total cost of items ordered (subtotal) | N | N |
| TaxTotal | Decimal | Total sales tax charged | N | N |
| ShippingTotal | Decimal | Total shipping costs | N | N |
| HandlingTotal | Decimal | Total handling costs | N | N |
| Status | Integer | Status indicator (see Appendix A) | N | N |
| ShipDate | Datetime | Timestamp when entire order shipped | N | N |
| TrackingNumber | Alphanumeric | Shipment tracking number | N | N |
| ShippingMethod | Alphanumeric | Shipping method (E.g. UPS Ground) | N | N |
| CouponCode | Alphanumeric | Coupon code used with order | N | N |
| DiscountTotal | Decimal | Total value of order discount | N | N |
| Meta1 | Alphanumeric | Additional meta information | N | N |
| Meta2 | Alphanumeric | Additional meta information | N | N |
| Meta3 | Alphanumeric | Additional meta information | N | N |
| Meta4 | Alphanumeric | Additional meta information | N | N |
| Meta5 | Alphanumeric | Additional meta information | N | N |

### Order Items

The order items file includes detailed information on the items purchased. Notice that they can each have a separate shipping date in the event of a partial shipment. The accepted data fields for order items are:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Header Name | Data Type | Description | Required (First Time) | Required (Update) |
| OrderNumber | Alphanumeric | Order number | Y | Y |
| Sku | Alphanumeric | Unique stock number of product | Y | Y |
| Quantity | Integer | Total number of units purchased | Y | N |
| Price | Decimal | Price of one unit purchased | Y | N |
| Status | Integer | Status indicator (see Appendix A) | N | N |
| ShipDate | Datetime | Timestamp when item shipped | N | N |
| TrackingNumber | Alphanumeric | Shipment tracking number | N | N |
| ShippingMethod | Alphanumeric | Shipping method (E.g. UPS Ground) | N | N |
| DiscountedPrice | Decimal | Total discounted cost of product | N | N |
| Meta1 | Alphanumeric | Additional meta information | N | N |
| Meta2 | Alphanumeric | Additional meta information | N | N |
| Meta3 | Alphanumeric | Additional meta information | N | N |
| Meta4 | Alphanumeric | Additional meta information | N | N |
| Meta5 | Alphanumeric | Additional meta information | N | N |

### 

### Customers

The customer file includes personal information about your customers which can be used to personalize emails sent through Listrak or filter out customers for targeted campaigns. The accepted data fields for customers are:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Header Name | Data Type | Description | Required (First Time) | Required (Update) |
| Email | Alphanumeric | Email address | Y | Y |
| FirstName | Alphanumeric | First name | N | N |
| LastName | Alphanumeric | Last name | N | N |
| Gender | Alphanumeric | Gender of customer (M/F, Male/Female) | N | N |
| Birthday | Date | Customer birthdate | N | N |
| ZipCode | Alphanumeric | Customer zip code | N | N |
| CustomerNumber | Alphanumeric | Internal customer number | N | N |
| Meta1 | Alphanumeric | Additional meta information | N | N |
| Meta2 | Alphanumeric | Additional meta information | N | N |
| Meta3 | Alphanumeric | Additional meta information | N | N |
| Meta4 | Alphanumeric | Additional meta information | N | N |
| Meta5 | Alphanumeric | Additional meta information | N | N |

### Products

The products file includes information specific to items found in your online store. These data points can be used in conjunction with Buyertrak or post-purchase email campaigns. The accepted data fields for products are:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Header Name | Data Type | Description | Required (First Time) | Required (Update) |
| Sku | Alphanumeric | Unique stock number of product | Y | Y |
| Title | Alphanumeric | Product name | Y | N |
| ImageUrl | Alphanumeric | URL for product image | N | N |
| LinkUrl | Alphanumeric | URL for product webpage | N | N |
| Description | Alphanumeric | Description of product | N | N |
| Price | Decimal | List price of product | Y | N |
| Brand | Alphanumeric | Brand name of product | N | N |
| Category | Alphanumeric | Category or department | N | N |
| SubCategory | Alphanumeric | Sub-category or sub-department | N | N |
| SalePrice | Decimal | Sale price of product | N | N |
| Meta1 | Alphanumeric | Additional meta information | N | N |
| Meta2 | Alphanumeric | Additional meta information | N | N |
| Meta3 | Alphanumeric | Additional meta information | N | N |
| Meta4 | Alphanumeric | Additional meta information | N | N |
| Meta5 | Alphanumeric | Additional meta information | N | N |

## ~~Step 2: Conversion Tracking Code~~

~~Listrak conversion tracking code will allow all visits from emails sent by Listrak to be tracked for the purpose of reporting on conversions resulting from any campaign. This feature needs to be setup properly to allow for successful tracking of your email marketing campaign (Shopping Cart Abandonment, Purchase Cadence Optimization, Traditional Marketing sends).~~

### ~~Installing on Your Site~~

~~The tracking code needs to be placed on every page of your site that you would like to track conversions on. This code is typically placed in the area directly above the </body> tag at the bottom of your pages. This location is also preferred by tracking software such as Google Analytics and Omniture. In most cases, adding this code to a single file that is included on every page of your site will be all that is necessary. If you do not have a “footer include,” you will need to ensure this code gets replicated to all static pages.~~

~~By placing the code below on all pages of your site, Listrak will be able to identify and attach a cookie to anyone who clicks on a link from a campaign sent to a list with Conversion Analytics enabled.~~

*~~Example code:~~*

~~<!-- Listrak Analytics – Script Source-->~~

~~<script type="text/javascript">~~

~~var biJsHost = (("https:" == document.location.protocol) ? "https://" : "http://");~~

~~document.write(unescape("%3Cscript src='" + biJsHost + "s1.listrakbi.com/scripts/script.js?m=<<MERCHANT\_ID>>&v=<<VERSION>>' type='text/javascript'%3E%3C/script%3E"));~~

~~</script>~~

~~<!-- Listrak Analytics - Submit Tracking Click-->~~

~~<script type="text/javascript">~~

~~\_ltk.Click.Submit();~~

~~</script>~~

~~Note: The code above will be placed on every page of your site~~ *~~except the order confirmation screen~~*~~, which is outlined below.~~

### ~~Conversion Page~~

~~Now that we can identify all visitors from Listrak email campaigns, we need to setup the code that sends conversion data to Listrak for reporting. Code will have to be added to the confirmation page that appears after a conversion is successfully recorded. There will be minor programming necessary to ensure all required data is pushed to Listrak.~~

*~~Example code:~~*

~~<script type="text/javascript">~~

~~var biJsHost = (("https:" == document.location.protocol) ? "https://" : "http://");~~

~~document.write(unescape("%3Cscript src='" + biJsHost + "s1.listrakbi.com/scripts/script.js?m=<<MERCHANT\_ID>>&v=<<VERSION>>' type='text/javascript'%3E%3C/script%3E"));~~

~~</script>~~

~~<!-- Listrak Conversion Tracking -->~~

~~<script type="text/javascript">~~

~~\_ltk.Order.SetCustomer('customer@domain.com', 'John', 'Smith');~~

~~\_ltk.Order.OrderNumber = '10025736';~~

~~\_ltk.Order.ItemTotal = '25.00';~~

~~\_ltk.Order.ShippingTotal = '6.99';~~

~~\_ltk.Order.TaxTotal = '1.50';~~

~~\_ltk.Order.HandlingTotal = '0.50';~~

~~\_ltk.Order.OrderTotal = '33.99';~~

~~\_ltk.Order.AddItem('SKU-123', 3, '5.00'); // one line per item ordered~~

~~\_ltk.Order.Submit();~~

~~</script>~~

~~<!-- Listrak Conversion Tracking -->~~

~~You will~~ *~~need to inject values~~* ~~for each of the values above like email, order number, and dollar totals. Below is a table explaining each property of the order object.~~

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ~~Property/Method~~ | ~~Data Type~~ | ~~Description~~ | ~~Required?~~ | ~~Example~~ |
| ~~SetCustomer~~ | ~~Method~~ | ~~Used to set customer specific data~~ | ~~Y~~ | ~~SetCustomer(‘~~*~~<emailAddress>~~*~~’, ‘~~*~~<firstName>~~*~~’, ‘~~*~~<lastName>~~*~~’)~~ |
| ~~- EmailAddress~~ | ~~Alphanumeric~~ | ~~Email address of customer~~ | ~~Y~~ | ~~‘customer@domain.com’~~ |
| ~~- FirstName~~ | ~~Alphanumeric~~ | ~~First name of customer~~ | ~~Y~~ | ~~‘John’~~ |
| ~~- LastName~~ | ~~Alphanumeric~~ | ~~Last name of customer~~ | ~~Y~~ | ~~‘Smith’~~ |
| ~~OrderNumber~~ | ~~Alphanumeric~~ | ~~Unique order number~~ | ~~Y~~ | ~~‘10-A9487-0024’~~ |
| ~~ItemTotal~~ | ~~Decimal~~ | ~~Total cost of items ordered (subtotal)~~ | ~~Y~~ | ~~‘25.00’~~ |
| ~~ShippingTotal~~ | ~~Decimal~~ | ~~Total shipping costs~~ | ~~Y~~ | ~~‘6.99’~~ |
| ~~TaxTotal~~ | ~~Decimal~~ | ~~Total tax charges~~ | ~~Y~~ | ~~‘1.50’~~ |
| ~~HandlingTotal~~ | ~~Decimal~~ | ~~Total handling costs~~ | ~~Y~~ | ~~‘0.50’~~ |
| ~~OrderTotal~~ | ~~Decimal~~ | ~~Total cost of order~~ | ~~Y~~ | ~~‘33.99’~~ |
| ~~AddItem~~ | ~~Method~~ | ~~Adds data for a single product ordered~~ | ~~Y~~ | ~~AddItem(‘~~*~~<productID>~~*~~’,~~ *~~<quantity>~~*~~, ‘~~*~~<price>’~~*~~)~~ |
| ~~- ProductID~~ | ~~Alphanumeric~~ | ~~Unique product ID or SKU~~ | ~~Y~~ | *~~‘SKU-123~~*~~’~~ |
| ~~- Quantity~~ | ~~Numeric~~ | ~~Quantity of product~~ | ~~Y~~ | ~~3~~ |
| ~~- Price~~ | ~~Decimal~~ | ~~List price of a single product~~ | ~~Y~~ | ~~‘5.00’~~ |
| ~~Submit~~ | ~~Method~~ | ~~Sends order data to Listrak~~ | ~~Y~~ | *~~N/A~~* |

**~~NOTE~~**~~: Make sure you call the~~ *~~AddItem~~* ~~method for~~ *~~each item the customer ordered~~*~~.~~

**~~NOTE~~**~~: Make sure you escape special characters like single quotes (\’) and backslashes (\\) within alphanumeric fields to prevent JavaScript syntax errors. These can be common in product and customer names.~~

## Step 3: Nightly Order History Uploads

As stated above, to ensure 100% coverage of order history data, we recommend sending daily order history files via FTP to ensure we know an entire customer’s purchase history. Each night, you simply need to post the following files with the previous day’s data:

1. **Products** – product catalog data
2. **Orders** – recent orders
3. **Order Items** – recent items ordered
4. **Customers** – all customers reflected in the order history data files

The format of these files remains the same as above. While regular customer/product files are optimal, only the order files are required.

## Step 4: Begin Using Customer Purchase Metrics in Listrak

Once we have the previous three steps completed, your Listrak account now has the following Customer Purchase Metrics set up as profile fields that are available for you to use:

**Customer Flag**

A contact who has ordered at least once.

**Order Count**

The number of orders the customer has placed.

**Avg Reorder Days**

The average number of days between orders for customers with more than one order. Calculated by taking the number of days between the 1st and last order and dividing by total orders minus one.

**Last Order Date**

The date and time of the last order placed by the customer.

**First Order Date**

The date and time of the 1st order placed by the customer.

**Projected Order Date**

The last order date plus the average reorder days is the expected next order date. (This does not take SKU quantity into account, only order events. Please use PCO for this data.)

**Spent One Year**

The total amount spent (order totals) by this customer in the last year from today. (Total amount is updated every 24 hours if necessary)

**Spent Two Year**

The total amount spent (order totals) by this customer in the last two years from today. (Total amount is updated every 24 hours if necessary)

**Spent Three Year**

The total amount spent (order totals) by this customer in the last three years from today. (Total amount is updated every 24 hours if necessary)

**Spent Total**

The total amount spent (order totals) by this customer.

**Recent Items Purchased**

Top 10 recent SKUs purchased by this customer joined in a ‘;’ delimited string. (Max 255 characters. This might limit the number of items returned)

**Average Order Value**

The Spent Total divided by the Order Count

# Appendix A

Status codes allow merchants to define what state an order is currently in. This is handy for denoting an order as shipped or canceled. The values for the status field must be numeric and are defined in the table below. The most common values will be: processing, shipped, returned and canceled.

|  |  |
| --- | --- |
| Status | Code |
| Not Set | 0 |
| Misc | 1 |
| Pre-Order | 2 |
| Backorder | 3 |
| Pending | 4 |
| Hold | 5 |
| Processing | 6 |
| Shipped | 7 |
| Completed | 8 |
| Returned | 9 |
| Canceled | 10 |
| Unknown | 11 |