

int_klaviyo_sfra

Version <20.1.0>

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Summary

This documentation describes how to implement Klaviyo's cartridge into your Salesforce Commerce Cloud application. The Klaviyo integration features a self-contained cartridge that handles passing events in real-time from your website to Klaviyo.

The cartridge includes preferences to be configured in the Business Manager and once enabled, contains all elements necessary to perform a successful best practices implementation of Klaviyo.

The OCAPI integration utilizes both "order_search" and "product_search" endpoints to sync catalog and order data.

Events tracked through cartridge (real-time):

- Active on Site
- Added to Cart
- Checkout Started
- Order Confirmation
- Site Search
- Viewed Category
- Viewed Product

Events tracked through OCAPI (periodic sync):

- Placed Order
- Ordered Product

Component Overview

Functional Overview

The Klaviyo cartridge provides integration for the following functionality:

- Integration of Klaviyo JavaScript library (referenced here: <https://www.klaviyo.com/docs/getting-started>)
- Integration of Klaviyo Server Side library (referenced here: <https://www.klaviyo.com/docs/http-api>) - Cartridge includes a controller to call the Klaviyo Track Server Side API. This is to fire order related events such as Order Confirmation to Klaviyo.
- Klaviyo JavaScript snippet integration and setup – Klaviyo tags can be fired in any page with the help of a modular ISML template and controller integration.
- Klaviyo Subscribe API (optional) – The cartridge also includes a controller to call the Klaviyo Lists API to check for the presence of and subscribe a user to a Klaviyo List. This can be used for functionality such as Newsletters and other forms.

Prerequisites

Before performing the steps in this document, ensure that you and your organization have satisfied the following criteria:

- You have reached out to Klaviyo and have set up a Klaviyo Account (where you can find your Klaviyo Organization ID and API Key, more details below).
- You have downloaded and unzipped the Klaviyo cartridge ZIP file from Salesforce Commerce Cloud Marketplace or your Klaviyo Consultant. The cartridge ZIP file contains the Klaviyo cartridge package residing in the folder int_klaviyo, the preferences configuration XML file, the services configuration XML file, and custom attribute definition file.

Compatibility, Reliability, Locality

The cartridge is designed for Salesforce Commerce Cloud API version 19.3+. Compatibility Mode: 19.10 for both Site Genesis (SG) and Storefront Reference Architecture (SFRA) (this is the SFRA document), but if you are on older versions please contact us for confirmation, as it should be supported.

If the Klaviyo service is down, events passed by the cartridge will not be recorded, logs will be created for “Order Confirmation” and “Added to Cart” events that use the KlaviyoTrackService, and there will be no performance impact on the Commerce Cloud website.

Klaviyo’s cartridge accesses data as it is rendered by Commerce Cloud, this allows multi-lingual and multi-locale support through the integration. Klaviyo provides the ability to choose currency per Klaviyo account.

Privacy, Payment

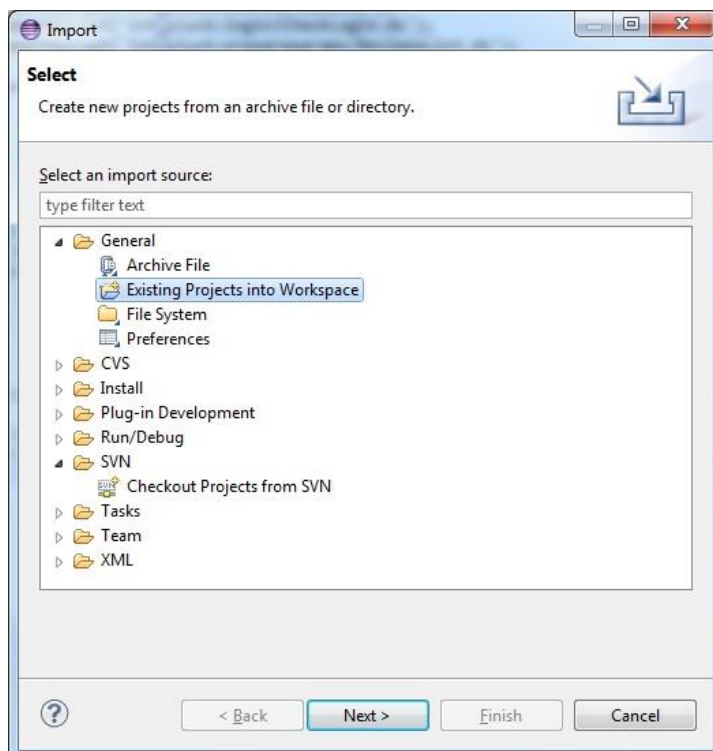
Please see the Klaviyo Privacy Policy here - <https://www.klaviyo.com/privacy>

Contact your account manager for pricing.

Cartridge Implementation Guide

Setup

- Open Salesforce Commerce Cloud Studio.
- Import downloaded cartridge. Select on import screen **plugin_klaviyo**

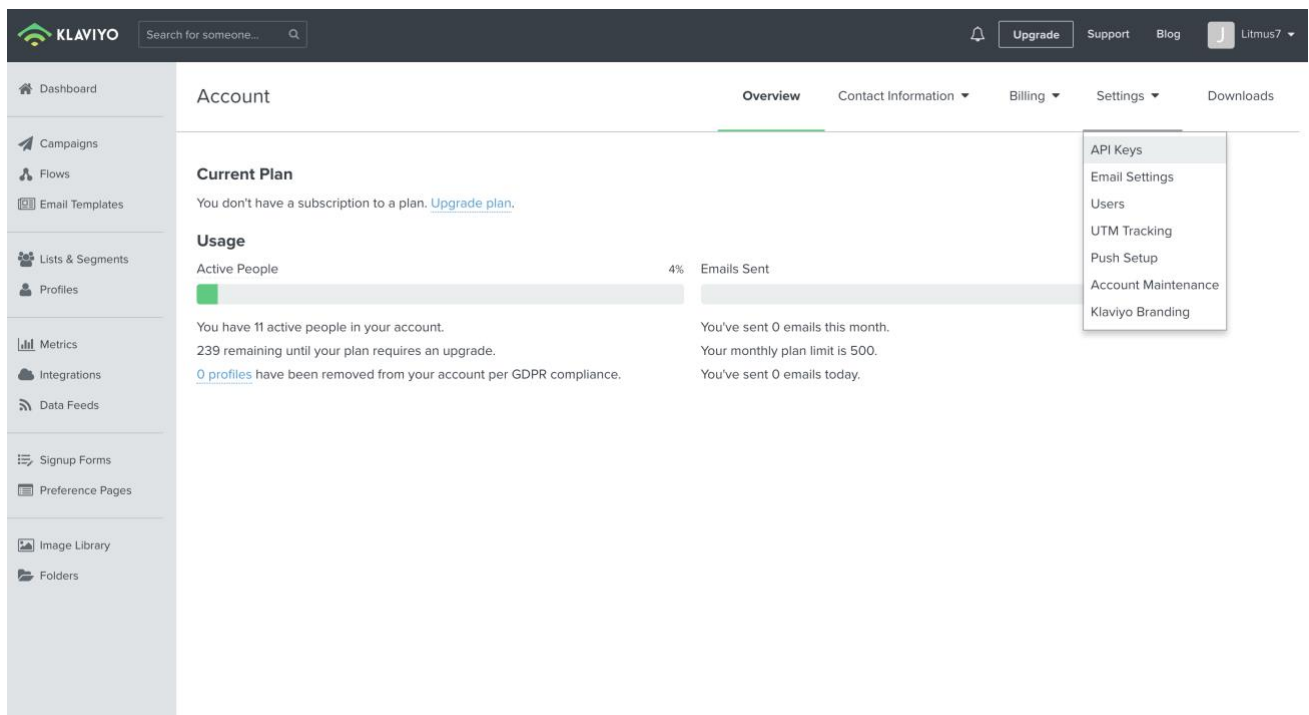


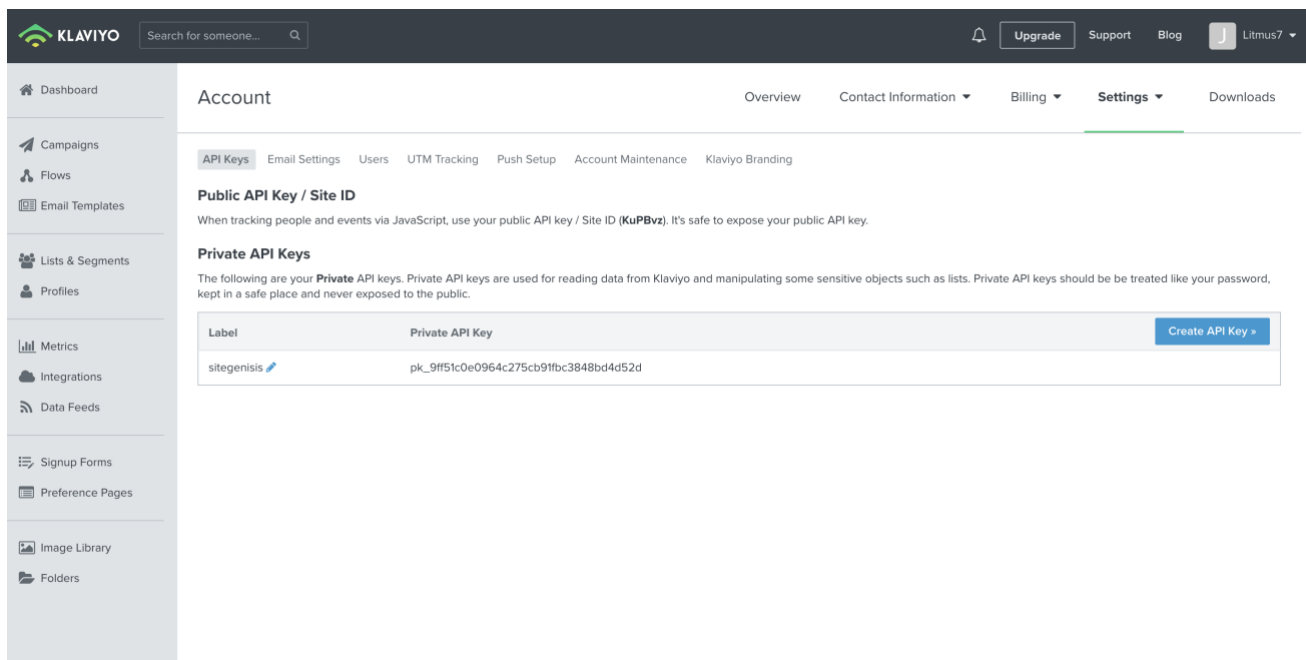
- Link cartridge to the sandbox: Select the Salesforce Commerce Cloud connection and select Properties. Select Project References and check in **plugin_klaviyo**

Klaviyo Configuration

Once you sign up for your Klaviyo account, you can get your Account ID and API key for setup from your Klaviyo account by following the below steps:

Navigate to the account section by selecting the drop down on the top right. Once in the account page, select the API Keys option under settings to reveal the Account ID and API key.





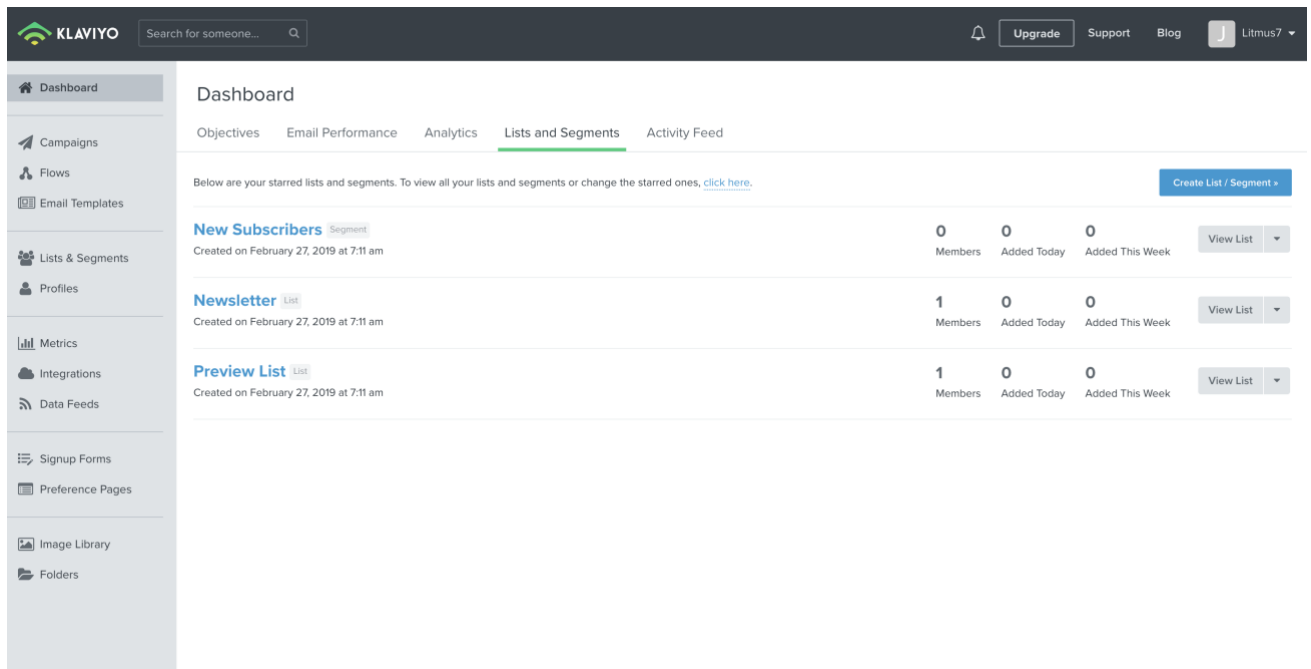
Business Manager Setup

- Once the cartridge is imported, it needs to be added to the list of cartridges in your site. Go to Business Manager: Administration -> Sites -> Manage Sites. Select your site, then select **Settings** tab. In cartridge path at the end, add **int_klaviyo**.
- Import the zipped services file that come with the cartridge (int_klaviyo\metadata\klaviyo_services_and_preferences.zip). This houses the service definitions for the Klaviyo track and lists server side API, and the custom preferences for Klaviyo. Go to Administration->Operations->Import and Export->Services. Upload and import the klaviyo-services.xml file. This will create one service (two others are optional for the Subscription Service and can be provided upon request):

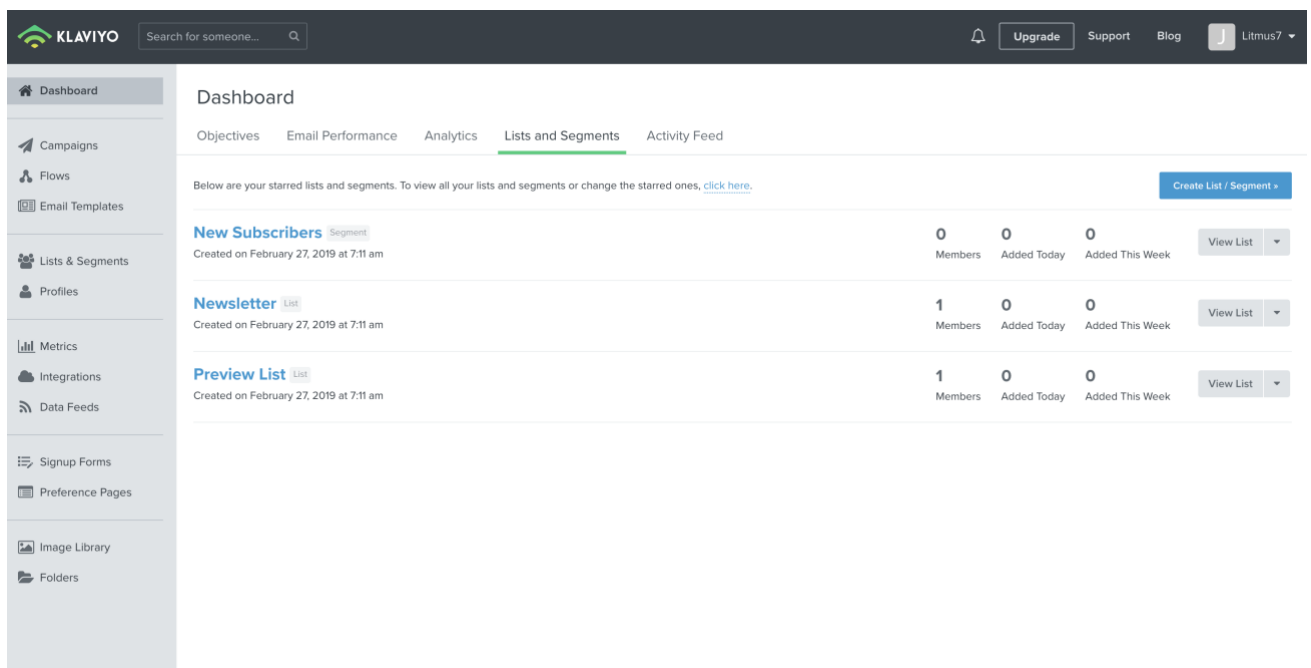
- KlaviyoTrackService

(Optional) For the KlaviyoSubscriptionService and KlaviyoCheckSubscriptionService, replace the ID in the service URL with the Klaviyo List ID that you will be using to subscribe users. For e.g.: the import file will have the service URL as <https://a.klaviyo.com/api/v2/list/Mm2HRr/members>. Replace the section highlighted in blue with your List ID from klaviyo

To get the List ID in Klaviyo, navigate to Lists and Segments in the Dashboard section.



Select the List you want and the URL will contain the List ID.



- After the metadata zip file import, create the Klaviyo preferences. This creates site level custom attributes for storing the Klaviyo account ID, image size, and API Key (optional). To import, navigate to Merchant Tools > Administration > Site Development->Import and Export. Under the meta data section, upload and import the custom_attribute_klaviyo.xml file. This creates the following attributes in Site Preferences:
 - Klaviyo Account – This is mandatory and used to authenticate to the Javascript API.
 - Klaviyo API Key – The private API key for the server side API.

- Klaviyo Enabled – To Enable the Klaviyo Service

Code isml Integration

- Add the following code to the end of pageFooter.isml file:

```
<isinclude template="components/footer/klaviyo_footer"/>
```

- Add the following code to the AddProduct function in the Cart.js controller file, just before the `res.json({.....});`

```
if(dw.system.Site.getCurrent().getCustomPreferenceValue('klaviyo_enabled')){  
    var KlaviyoUtils = require('*/cartridge/scripts/utils/klaviyo/KlaviyoUtils');  
    KlaviyoUtils.trackAddToCart();  
}
```

Be careful to check imports in Klaviyo cartridges if you are overwriting core cartridges.

External Interfaces

All calls are made from tracking and identification on the pages are done through the Javascript Track and Identify calls which can be referenced in <https://www.klaviyo.com/docs/getting-started>.

For the server side calls pertaining to List Subscription and Track call for order confirmation, please refer <https://www.klaviyo.com/docs/http-api> and <https://www.klaviyo.com/docs/api/v2/lists> .

Firewall Requirements

N/A

Testing

Klaviyo tracks every event except “Order Confirmation” by placing a data-structure in the DOM named “_learnq”. There is a full list under “Storefront functionality” that shows what events to expect to see “_learnq” for.

Login to Klaviyo and go to <https://www.klaviyo.com/dashboard>

To see the service in action, login to the storefront and cookie yourself by adding “utm_email=test@test.com” test the user activities such as viewed product, add to cart, active on site, search, order placed to see the events come through to Klaviyo.

Click on the Activity Feed to see all the activities and events tracked like Viewed Product, Add to Cart, Checkout Started , Subscribed to list etc..

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Objectives

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Analytics

Lists and Segments

Activity Feed

Showing Feed for

All Metrics

vysakh ab
 vysakh@limitus7.com
 12 hours ago

Placed Order

Details

vysakh ab
 vysakh@limitus7.com
 12 hours ago

Checkout Started

Details

vysakh ab
 vysakh@limitus7.com
 12 hours ago

Add to Cart

Details

vysakh ab
 vysakh@limitus7.com
 12 hours ago

Viewed Product

Details

vysakh ab
 vysakh@limitus7.com
 12 hours ago

Placed Order

Details

Click on Details to see the event data

J

Joji Thomas
 joji.thomas@limitus7.com
 7 hours ago

Active on Website for 1:00 hour

Details

J

Joji Thomas
 joji.thomas@limitus7.com
 11 hours ago

Placed Order

Details

J

Joji Thomas
 joji.thomas@limitus7.com
 11 hours ago

Checkout Started

Checkout Started Value: 988.03
Categories: Flat Screen, Flat Screen
ItemCount: 1
Items: Sony Bravia® N-Series 26" LCD High Definition Television
line_items: {u'Product UPC': 'u', u'Product Page URL': u'https://dev07-na01-tatcha.demandware.net/s/RefArch/electronics/televisions/flat%20screen/sony-kdl-26n4000M.html?lang=en_US', u'Product I...'}
 Collapse

J

Joji Thomas
 joji.thomas@limitus7.com
 11 hours ago

Viewed Product

Categories: Flat Screen, Flat Screen
Price: 899.99
Primary Category: Flat Screen
Product ID: sony-kdl-26n4000M
Product Image URL: https://dev07-na01-tatcha.demandware.net/on/demandware.static/-/Sites-electronics-m-catalog/default/dw2fad18bf/images/large/sony-kdl-26n4000.jpg
Product Name: Sony Bravia® N-Series 26" LCD High Definition Television
Product Page URL: https://dev07-na01-tatcha.demandware.net/s/RefArch/electronics/televisions/flat%20screen/sony-kdl-26n4000M.html?lang=en_US
Product UPC:
 Collapse

J

Joji Thomas
 joji.thomas@limitus7.com
 12 hours ago

Viewed Category

Viewed Category: electronics-televisions
 Collapse

J

Joji Thomas
 joji.thomas@limitus7.com
 12 hours ago

Viewed Product

Details

nts

ges

V

vysakh ab

vysakh@litmus7.com

Placed Order

22 hours ago

Placed Order Value: 314.99

BILLING_ADDRESS: {u'CITY': u'Alaska', u'FIRST_NAME': u'vysakh', u'LAST_NAME': u'ab', u'ADDRESS1': u'vysakh', u'ADDRESS2': u'ab', u'PHONE': u'3333333333', u'POS...

CARD_LAST_FOUR_DIGITS: *****1111

CARD_TYPE: Visa

CUSTOMER_NAME: vysakh ab

CUSTOMER_NUMBER: DEV0300005501

DISCOUNT: \$0.00

EXP_DATE: 2015-07-29

GIFT_CARD_LAST_FOUR:

GIFT_ITEM_PRESENT: false

GIFT_MESSAGE:

GIFTITEMS: {u'SENDER_NAME': u'', u'PRICE': u'', u'RECIPIENT_EMAIL': u'', u'SENDER_EMAIL': u'', u'RECIPIENT_NAME': u''}

ITEM_CATEGORIES:

ITEM_COUNT: 1

ITEM_PRIMARY_CATEGORIES:

ITEMS: 750518699578

MANAGE_ORDER_URL: https://dev03-na01-tatcha.demandware.net/on/demandware.store/Sites-klaviyo-Site/default/Account-Show

ORDER_DATE: 2019-03-21

ORDER_NUMBER: 00000912

ORDER_TOTAL: \$314.99

PRODUCT: {u'PRODUCT_IMG_URL': u'https://dev03-na01-tatcha.demandware.net/on/demandware.static/-/Sites-apparel-catalog/default/dw6ebc611b/images/large/PG...

PROMO_CODE:

PROMO_TYPE:

REPLENISHMENT_ORDER: false

SHIPPING_ADDRESS: {u'CITY': u'Alaska', u'FIRST_NAME': u'vysakh', u'LAST_NAME': u'ab', u'ADDRESS1': u'vysakh', u'ADDRESS2': u'ab', u'PHONE': u'3333333333', u'P...

SHIPPING_COST: \$0.00

SHIPPING_METHOD: Store Pickup

SUBTOTAL: \$299.99

TAX: \$15.00

Operations

Data Storage

N/A

Availability

N/A

Support

For technical support or any issues related to Klaviyo, please contact your Klaviyo Contact. For specific questions related to the cartridge, please reach out via email to support@klaviyo.com

User Guide

Roles, Responsibilities

N/A

Business Manager

Please refer the Business Manager Section above for setup related information. There is no other Business Manager setup required other than the initial configuration stated in that section.

Storefront Functionality

The storefront integration will invoke the following events and tracking for the following functionality:

- Viewed Product – Event fired when a user views a product page. The information regarding the viewed product is passed along to Klaviyo here.
- Viewed Category – Event fired when a user views a category page.
- Search – Event fired when a user initiates a search.
- Add to Cart – Event fired when user adds/modifies his/her cart
- Started Checkout – Event fired when user initiates the checkout process

- Placed order – Event fired when the user places his/her order

User details also get passed to Klaviyo via the Track API when a user logs in or registers via the storefront.

Known Issues

N/A

Release History

Version	Date	Changes
01/01/00	22 nd March 2019	Initial release
01/02/00	28 th January 2020	Updated for image links and language clarification
01/03/00	20 th February 2020	Updated for Salesforce Commerce Cloud Certification process