Shopify CRM - Agile CRM

Shopify is an e-commerce platform that enables individuals and businesses to create online stores. Agile CRM integrates with Shopify to help online stores increase sales with the latest tools for web engagement and marketing automation. No downloads, no installation - just a one-time integration with the Agile CRM app and you'll be selling smarter in no time!

Here's a detailed setup guide for Agile's Shopify Integration:

1. Get the app
Go to the Shopify Apps page - https://apps.shopify.com/agile-crm - and install the Agile CRM app for your store by clicking on the the 'Get App' button on the app page.

2. Enter your store's URL
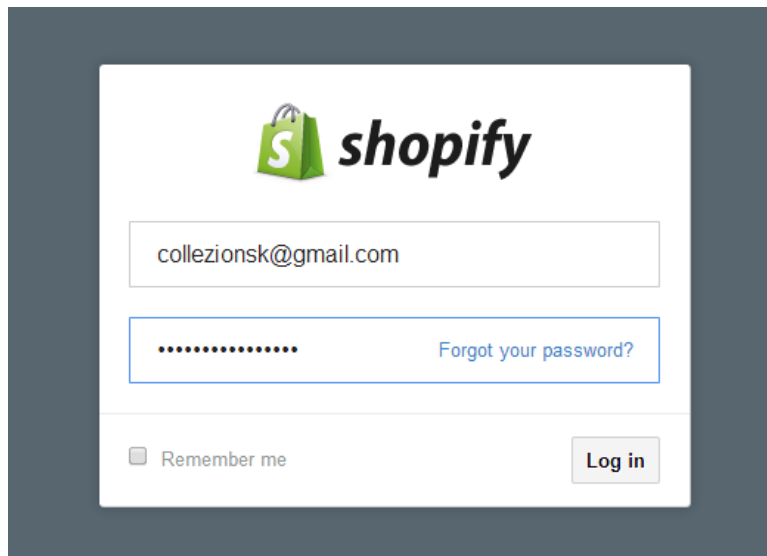Clicking on the "Get App" button takes you to the Shopify setup page. Create a new account if you don't already have one, then enter your store's URL to log in.
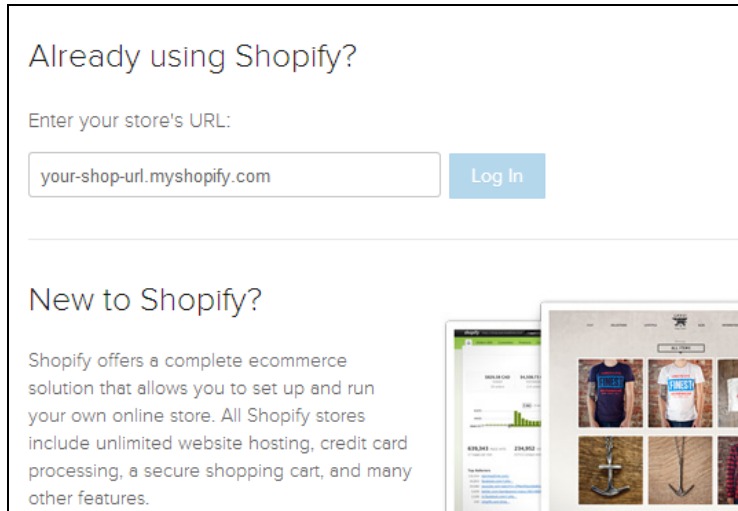
3. Log in to your Shopify account

Upon clicking the 'Log In' button, this Shopify login window opens up. Enter your Shopify online store's login details to sign in.

4. Enter your Agile CRM domain name and API key

When the following window pops up, enter your Agile domain name (eg. if your domain is *yourcompany*.agilecrm.com, enter "yourcompany") in the "Enter Domain Name (company)" field. In your Agile CRM domain, go to Admin Settings---> API & Analytics---> API Key. Copy the API key and paste in the "API Key" field. Click "Submit".

If you don't have an Agile CRM account yet, clicking on the 'Create a new account' button will direct you to the Agile CRM sign up page. Once you've created an account, begin again with this step (Step 4).

5. Install the app

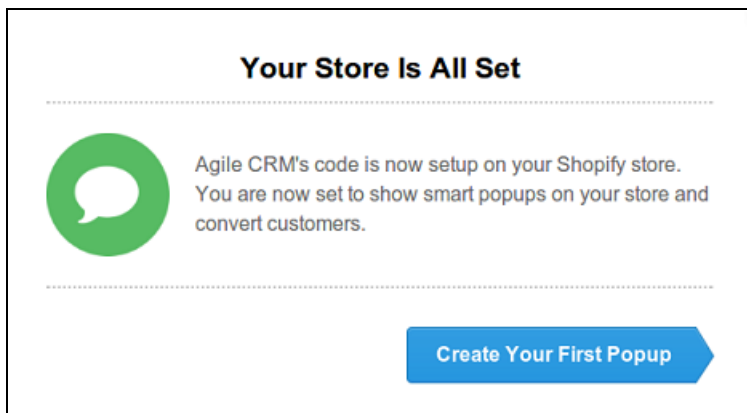After submitting your domain name and API key, you should now see the following window. Click the "Install App" button and you'll be asked to log in to your Agile domain to integrate the CRM with your online store.
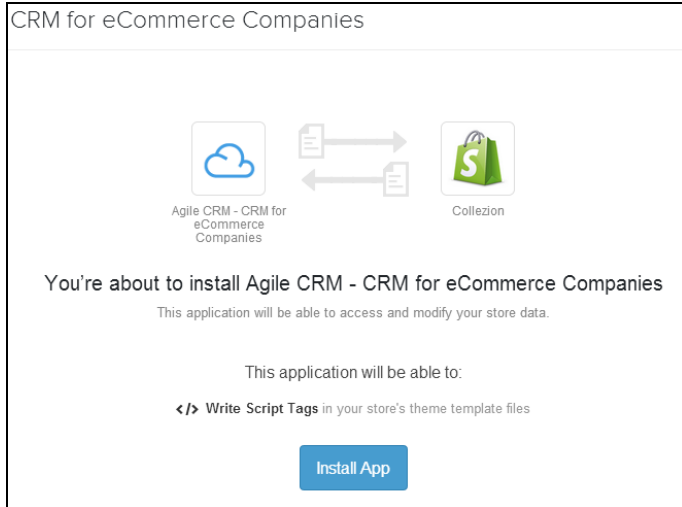
Upon doing that, you'll see the following window. It's time to create your first pop-up!

6. Set web rules

Click on the 'Create your first popup' button shown in the above window or move to the Web Rules menu in Agile CRM and click on the "+Add Web Rule" button to set web rules for your online store. Add web rules based on your store's requirements, visitors' web activity, page bouncing, etc. Web rules let you automatically greet your visitors with smart popups, show them personalized coupons at the perfect time, and much more.

The following video will help you set up web rules:
https://www.youtube.com/watch?v=XGouq0B_7G8

7. Enable web tracking
Agile's analytics code was automatically copied to your website during the integration setup. (For reference: you can find the code and an explanation of the code in Agile under Admin Settings ---> API & Analytics ---> Analytics Code.)

Now, use our API (link given below) to write tracking code that lets you capture visitor emails and use 'set_email' to track contacts' browsing activity.

Our API: https://github.com/agilecrm/javascript-api#1tracking-website-visitors

Once web tracking is enabled, you can choose to receive in-app (in Agile) and desktop notifications on contact activity. To enable notifications, go to Preferences ---> Notifications and choose which notifications you'd like to receive.

That's it! You are done setting up Agile's Shopify integration. If you're ready to integrate Shopify activity into automated campaigns in Agile, go to the next step.

8. Set up Shopify Event Triggers

Setting up Shopify Event Triggers lets you trigger a particular campaign whenever a Shopify Event (customer created, order cancelled, etc.) occurs.

Firstly, you have to create a webhook in Shopify for each Shopify event. To do that, go to your Shopify store and click on the 'Notifications' in the menu on the right side ---> Create a Webhook & then choose your event, set the format to 'JSON' and enter the URL as follows:

URL: https://domain.agilecrm.com/shopifytrigger?api-key=API-Key

('domain' and 'API-Key' in the above URL have to be replaced with your domain name & Agile API-key respectively.)

You have to do this for all of the Shopify events that you need.

After setting up webhooks, from your Agile dashboard, go to Campaigns ---> Manage Triggers ---> Add Trigger. From the '+Add Trigger' window shown below, select 'Shopify Event' in the 'When this happens' field and then select your Shopify event. Next, select the campaign that you want to run on the select audience and save the details. You're now all set up with Shopify event triggers.

Setting up Shopify triggers will fully avoid the need for syncing your Shopify contacts to Agile, after the initial sync if you haven't set up the regular sync.

We hope you enjoy Agile's Shopify CRM integration. We're here to help you scale your ecommerce business exponentially.

Related Links:
Shopify Integration - Agile CRM (blog)
Web Grabbers - Agile CRM
Marketing Automation Software - Agile CRM
Mobile Marketing - Agile CRM (blog)