

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 'Get App' button on the app page.

[All Apps](#) / [Sales](#) / Agile CRM - CRM for eCommerce Companies

 Agile CRM - CRM for eCommerce Companies

- ✓ Complete eCommerce sales and marketing solution
- ✓ Triple online conversions with smart pop-ups, coupons, sign-up forms and web grabbers
- ✓ Engage shoppers offline with newsletter campaigns, cart abandonment emails, auto responders and a complete social suite

Get App

Price	Free - \$64.99 / month
Free Trial	60 days
Developer	Agile CRM

Requirements

Agile CRM FREE

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.

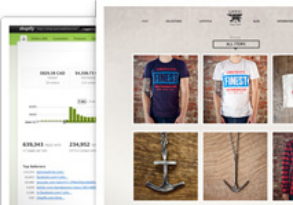
Already using Shopify?

Enter your store's URL:

[Log In](#)


New to Shopify?

Shopify offers a complete ecommerce solution that allows you to set up and run your own online store. All Shopify stores include unlimited website hosting, credit card processing, a secure shopping cart, and many other features.

A preview of a Shopify store interface, showing a grid of products including t-shirts and a wooden anchor.

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.



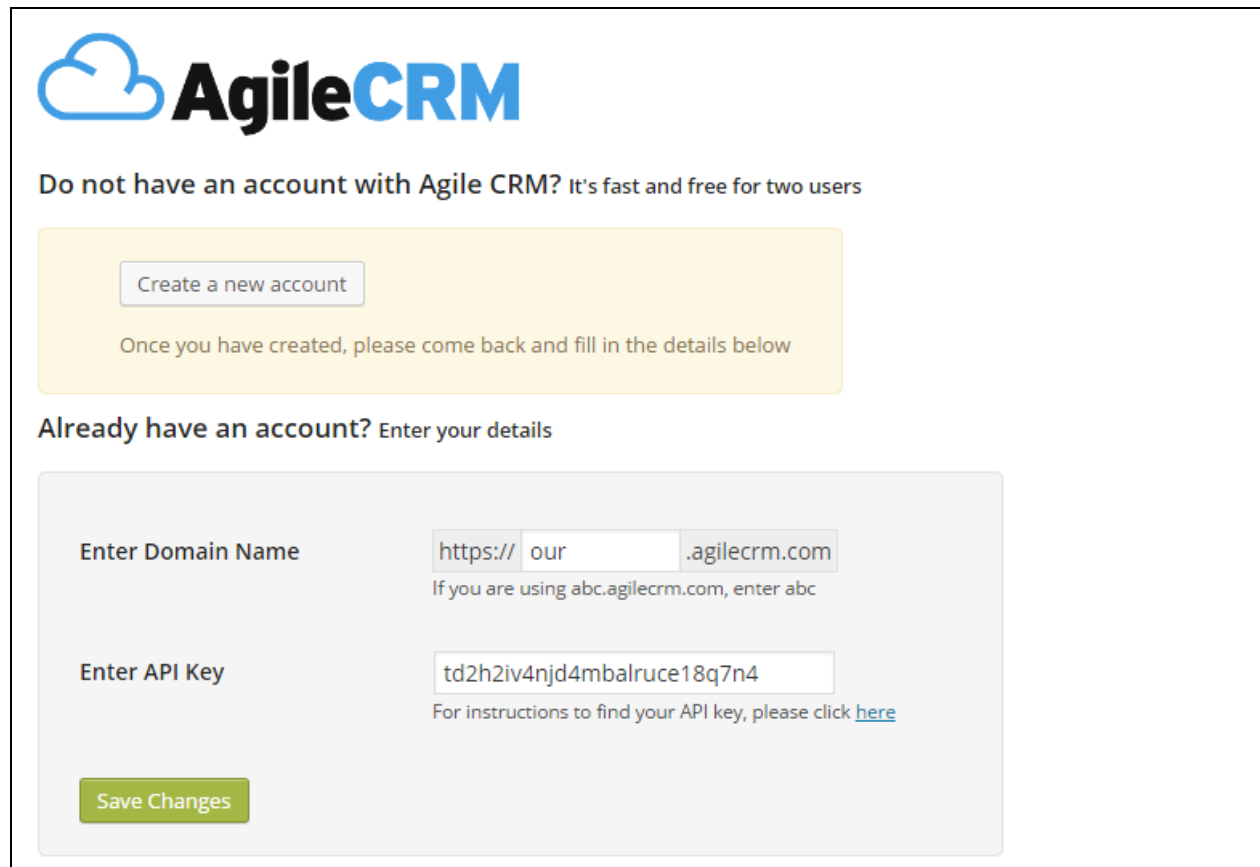
[Forgot your password?](#)

☐ Remember me [Log 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”.

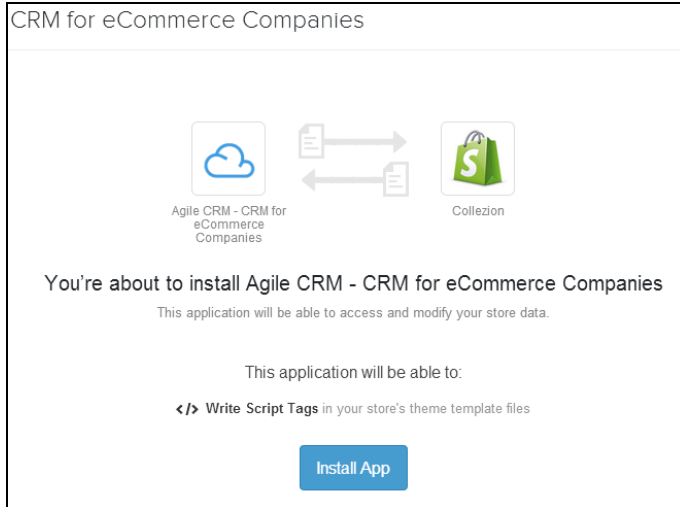
If you don’t have an Agile CRM account yet, clicking on the ‘Create a new account’ button will direct you to the Agile CRM sign up page. Once you’ve created an account, begin again with this step (Step 4).



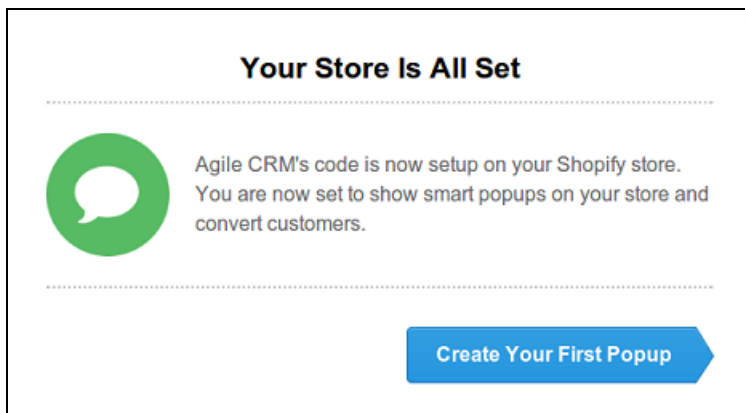
The screenshot shows the Agile CRM account setup interface. At the top is the Agile CRM logo, consisting of a blue cloud icon and the text "AgileCRM". Below the logo is a heading: "Do not have an account with Agile CRM? It's fast and free for two users". Under this heading is a yellow box containing a button labeled "Create a new account" and the text "Once you have created, please come back and fill in the details below". Below the yellow box is another heading: "Already have an account? Enter your details". Under this heading is a light gray box containing two input fields. The first field is labeled "Enter Domain Name" and contains the text "https:// our .agilecrm.com". Below this field is a note: "If you are using abc.agilecrm.com, enter abc". The second field is labeled "Enter API Key" and contains the text "td2h2iv4njd4mbalruce18q7n4". Below this field is a note: "For instructions to find your API key, please click [here](#)". At the bottom of the light gray box is a green button labeled "Save Changes".

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

The screenshot shows a web rule configuration interface. At the top, the 'Name' field is set to 'Exit Intent Popup'. Below this, the 'Condition' section contains three rules: 'Page URL' is 'is' 'https://collezione.myshopify.com/colle', 'Referrer URL' 'contains' 'https://collezione.myshopify.com/search', and 'Customer' is 'new customer'. The 'Action' section is set to 'Modal Popup'. Below the action dropdown, there is a link '(Select a template / Edit in HTML editor)'. A text area contains the following HTML code:

```
<html lang="en">
<head>
<meta http-equiv="content-type" content="text/html; charset=utf-8"/>
<title>Popup</title>
<script type="text/javascript">window.mod_pagespeed_start = Number(new Date());</script><link href="https://fonts.googleapis.com/css?family=Montserrat:400,700" rel="stylesheet" type="text/css"/>
<style>body{background:#333;width:650px;height:278px}#popup{background:rgba(0,0,0,.5);color:#144366;font:26px/34px 'Montserrat',Arial,sans-serif;important;letter-
```

 To the right of the text area is a 'Preview' button. Below the text area, the 'When to show' dropdown is set to 'About to exit page'. At the bottom right of the configuration area is an 'Add Action' button.

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.)

The screenshot shows the Shopify Admin interface. On the left is a dark sidebar with a menu. The 'Notifications' menu item is highlighted with a red arrow. In the main content area, the 'Add A Webhook' dialog box is open. This dialog has two dropdowns: 'Event' set to 'Order creation' and 'Format' set to 'JSON'. The 'URL' field contains the text 'https://domain.agilecrm.com/shopifytrigger?api'. Below the URL field are 'Cancel' and 'Save webhook' buttons. Another red arrow points from the 'Create a webhook' button in the 'Webhooks' section of the main interface to the 'Add A Webhook' dialog box.

Notifications

Order notifications

Get notified by email or text message whenever a new order comes in. You can also subscribe to the RSS feed for this store's orders.

[Add an order notification](#)

Webhooks

You can subscribe to events for your products and orders by creating web hooks that will push XML or JSON notifications to a given URL.

[Create a webhook](#)

Add A Webhook

Event: Order creation

Format: JSON

URL: https://domain.agilecrm.com/shopifytrigger?api

[Cancel](#) [Save webhook](#)

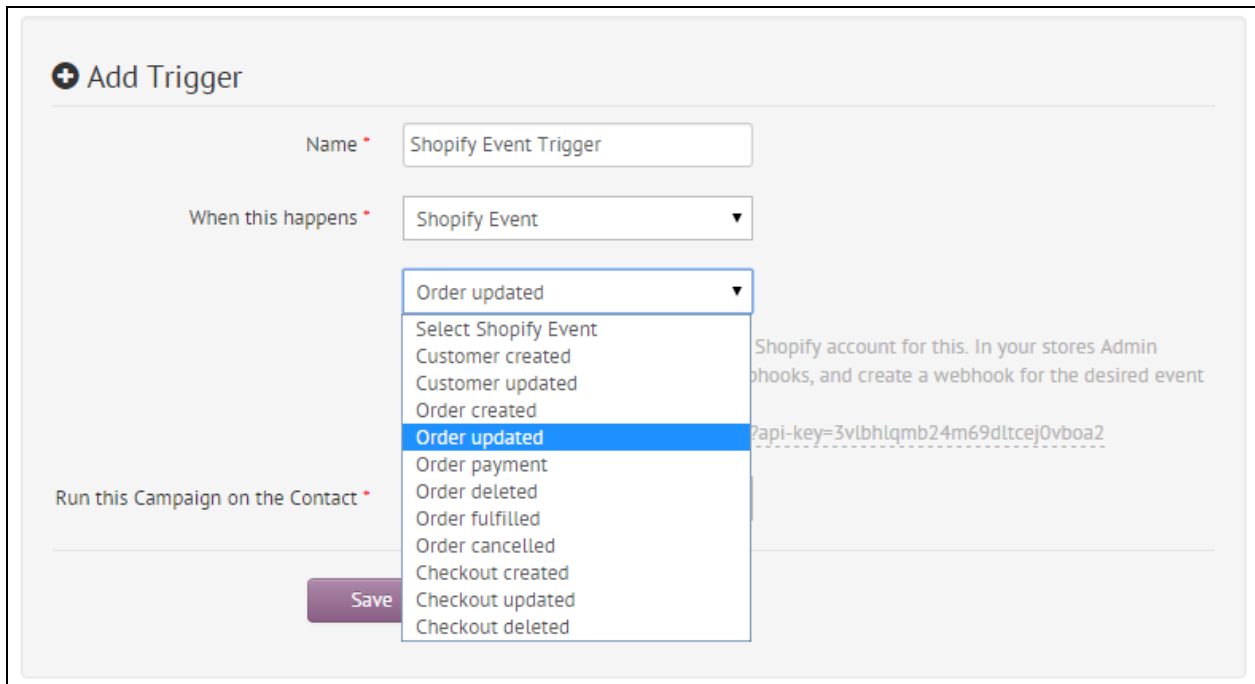
Event	Callback URL	Format
Checkout creation	http://requestb.in/1835xlg1	JSON

All your webhooks will be signed with **aad9b03d70e50799c665**

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.



The screenshot shows the 'Add Trigger' form in Agile CRM. The form has a title '+ Add Trigger' with a plus icon. It contains three main sections: 'Name', 'When this happens', and 'Run this Campaign on the Contact'. The 'Name' field is a text input with the value 'Shopify Event Trigger'. The 'When this happens' field is a dropdown menu with 'Shopify Event' selected. A dropdown menu is open below it, showing a list of Shopify events: 'Order updated', 'Select Shopify Event', 'Customer created', 'Customer updated', 'Order created', 'Order updated' (highlighted in blue), 'Order payment', 'Order deleted', 'Order fulfilled', 'Order cancelled', 'Checkout created', 'Checkout updated', and 'Checkout deleted'. The 'Run this Campaign on the Contact' field is a text input. A 'Save' button is located at the bottom right of the form. In the background, there is a faint text overlay: 'Shopify account for this. In your stores Admin', 'Webhooks, and create a webhook for the desired event', and 'api-key=3v1bhlqmb24m69dltcej0vboa2'.

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 \(blog\)](#)