The essential guide to integrating and customizing Shopify
Using Bedrock Data
What’s Inside: The best practices for integrating and customizing Shopify.

1. Ease of Use, Customizations and System Design: How easy is Shopify to use, customize and integrate with your other business apps? What are the best features, how do they work and what can they do for your team? This section includes a review of Shopify’s data model as well.

2. Syncing Data Out (updating your other systems): How do you sync relevant customer and sales data from Shopify out to your CRM, finance, marketing, ERP, corporate database and other systems to inform your team about your sales and customer activities?

3. Useful Shopify Integrations: What does the Shopify integration landscape look like? Are there free, out of the box native integrations? We’ll talk about 3 potential use cases that will make your usage of Shopify much more awesome.

4. Overall: Bottom line: How good of a system is Shopify for your business? Shopify integrations become easy when making use of a Bedrock Data integration.
Introduction

Consider yourself a Shopify expert?
Then you can probably skip this page.

Shopify’s mission is to make commerce better for everyone so that businesses can focus on what they do best: building and selling their products. Today, merchants use the Shopify platform to manage every aspect of their business – from products to orders to customers, selling online, in retail stores, and on the go. Currently, there are 175K active Shopify stores, worth $10B in collective sales. (1)

As a fully managed and hosted e-commerce platform, Shopify is a powerful e-commerce provider that is easy to set-up, install, configure and use (you don’t have to set up and install your own hosting.) The platform comes with a well-designed user interface based on the theme you chose and contains a plethora of e-commerce capabilities such as inventory management, customer tracking, sales reporting and more.

Since Shopify is not an open-sourced tool, customization is limited to an extent, but it is one of the leading tools for a number of small businesses on a budget who have little to no in-house web development and programming capabilities.

In April 2010, Shopify launched a free mobile app on the Apple App Store in May 2010. The app lets Shopify store owners view and manage their stores from iOS mobile devices. Shopify also extended its offers to a point-of-sale app, as well as social commerce options like the ability to sell products through Pinterest and Facebook. (2)

Ease of Use, Customizations and System Design

While Shopify is an easier option than many hosted e-commerce platforms, fitted with an all-in-one ecommerce solution (consisting of a CMS + theme + hosting), the setup process still isn’t “just add water.” However, much of the set-up can be learned including how to get your domain name redirected correctly.

It is clear that Shopify’s intent is to humanize the e-commerce experience by designating its “Contacts” simply as “Customers”, and its “Opportunities” as “Orders.” You can also denote which customers accept marketing messages from your marketing team so that they can follow up with personalized emails once you integrate your Shopify with your marketing automation and email app/s.

For instance, Shopify features popular plug-ins, including email providers like Mailchimp, granting you the ability to create and send targeted email campaigns based on a customer’s buying behavior and interactions with your store.

What makes Shopify so strong as an e-commerce provider is that it is armed with a slew of professionally-made, responsive website design themes, and is easily customizable to fit your brand. Some theme modifications are trivially easy, while some are more complex, and you’ll want someone who is capable of coding a bit of HTML and CSS to get it done.
Syncing data into your Shopify account is not nearly as critical as being able to sync the data back out to your Bookkeeping, CRM, Marketing, and other systems that your business is using. This is especially important for being able to share Shopify data with your finance, sales, and marketing teams, like Orders and Opportunities, ultimately granting them the ability to see a 360-degree, holistic view of the business’ customers and finances.

Integrations and Shopify’s APIs

If you’re considering engineering an integration with Shopify in-house, you’ll find that their APIs are pervasive across essentially all system objects. This means that you can pull data out of customers, orders, custom fields, etc… If you’re planning on writing a Shopify integration yourself or in-house, you’ll find an easy to use API and some client libraries that will help your developers get started developing on top of the Shopify platform.

Again, the bidirectional nature of an integration to allow you to sync data not only from Shopify to your other business systems is great, but also the ability to sync data back from your other systems as it’s changing, to update Shopify is very helpful. It will give you peace of mind that your data will always be in sync and your team can get use out of it.

Certain integration systems (like Bedrock Data) will allow you to de-duplicate contact records by their email addresses when syncing data out, as well as configure your own custom field mappings at no added cost.
Useful Shopify Integrations

We thought it would be useful to provide a few interesting integration features that you can achieve with a Shopify integration.

Shopify // CRM Integrations

1) First time customers: When a customer first purchases a product through an online store, that new customer should sync to CRM as a contact, likely as a “person account,” “customer” or simply a “contact” in the CRM, with the proper status assigned. If a customer is part of a company, then there may be a need to create an “Account” as well. Much of the time though, an e-commerce customer will be an individual, so no account necessary. If the CRM includes separate “opportunity” or “deal” objects, then there may be a need to also create a “won” opportunity or deal along with the new customer.

2) Repeat customers: For repeat customers, you’re not adding a new (contact or customer) record, because one already exists. Instead, the idea is to “append” the data that you’ve already generated about this customer. For instance, you may want to add a new “purchase” to the existing contact or customer record in CRM. Or you may want to simply add an activity as a child object. If you aren’t using any child objects in your CRM like this, then your best bet is to simply find an integration that can update fields on the lead or contact in CRM. These fields will include “products purchased,” which will continuously update with new products that people have purchased. For abandoned carts, you’re better off using your marketing system to manage these.

3) Syncing Shopify Orders to CRM Opportunity: Perhaps the most valuable use case for a Bedrock Data Shopify integration is to be able to sync Orders in Shopify out to another systems’ Opportunity object (since this is how Bedrock deduplicates Orders.)

This feature allows you to be able to create new Opportunities in another system, based on new Orders coming into Shopify.
One example (amongst many) for using this capability might be to sync the “reasons someone canceled their Shopify account” over to your HubSpot CRM for your Customer Success team to reference.

**Shopify // Marketing & Email Integrations**

1) Depending on how your E-commerce shopping cart solution is setup, you are probably first requiring contacts to “register” for your store before purchasing. This “registration” event should sync a lead or contact to your marketing system, or if the lead already exists (matching on email address), update the existing lead (rather than creating a duplicate).

2) If this “registration” lead doesn’t end up purchasing, then you should be able to tell that this was someone who “abandoned” a shopping cart.

3) Because you’ve already created the lead/contact in your marketing automation system, then a “purchase” event should simply update the already created record, tagging it as a customer.

4) Because of this “two step” process, you should be able to segment your marketing database to tell which leads have “abandoned” their shopping cart, and bounced off of your online store. You can then nurture these leads to return and finish out their purchase.

5) Some shopping carts also offer the ability to track “contacts” in them – which might be leads or contacts and can include customers as well. If you aren’t using a CRM, then this might be what you’re doing, in which case, there may be a need to sync records who convert through other offers into your E-commerce system. This is rare, but can be a need for certain companies.
Overall Takeaways

Shopify remains a very powerful e-commerce solution for the small business owner. It comes with a number of professional grade design themes, and self-hosting, so you can get your shop up and running in just a few days with little to no knowledge of coding. While the out of the box plug-ins and integration options are limited, Shopify integrations become easy when making use of a Bedrock Data integration.

The objects of the system are simple and aligned with other Bookkeeping, CRM, Marketing, ERP and other business software. While great for small teams, you may find yourself wanting some more automation options like customer assignment, workflows, enhanced customer reporting, customer marketing, finance reporting and more.

Shopify’s pricing is also very much geared toward small businesses with packages starting as low as $9 per month and increasing to $149 per month based on your reporting and marketing needs.

The Design Options, Customization and Ease of Use are what make Shopify truly unique. With further growth and innovation from a seasoned team, it’s clear that Shopify will only continue to get better. In fact, we recommend it as an e-commerce product to small businesses that we work with all the time.
It’s simple, we put the right data in the right place.