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How to Install Cartiveo

Sync your Shopify and Marketo seamlessly without any trouble. Grazitti’s Cartiveo allows you to bring important information from your Shopify store to Marketo for better personalization, shared abandoned cart data across Shopify and Marketo to get a better ROI from marketing campaigns.

Here’s How You Can Start Using Cartiveo

Install the integration connector

Step 1: Once installed, click on “install app” to give permission for app installation.

Step 2: Add credentials in Marketo configuration section (Marketo Rest Endpoint, Client ID, Client Secret) and click Submit.
**Step 3:** Install webhooks that are responsible for making an automated connection between Marketo and Shopify while creating orders and customers.

![Webhooks UI](image)

**Creating Customers**

Shopify offers 3 ways to create customers.

**1. From the Admin Panel**

- Click on Customers on the left side of the *Admin Page*
• Click on Add customer on the top right corner of the page

• Add First Name, Last Name, Email id in the provided fields.
• Click on **Send account invite** to the customer

• Customer will receive email and when customer clicks Activate account from email then he has to add password for that account and submit
• Once done, the That customer will be automatically synced with Marketo and the tag will automatically be assigned to the customer account.

2. From the Frontend

• Click on customer icon at the top right corner of the homepage (right next to the search icon)
• Then click on **create an account**

![Create Account](image1)

• Fill in the details—First name, Last name, Email, and Password and then click **create**

![Create Account](image2)

• Once done, the customer will automatically be synced with Marketo and the tag will automatically be added to the be assigned to the customer account.

![Customer](image3)
3. As Guest Customer

When a visitor creates an order, a guest customer is created automatically

- Go to the website’s homepage
- Add products in the cart
• Click on Check out

<table>
<thead>
<tr>
<th>Product</th>
<th>Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anacapa Polarized Sunglasses</td>
<td>Rs. 179.00</td>
<td>1</td>
<td>Rs. 179.00</td>
</tr>
</tbody>
</table>

Subtotal: Rs. 179.00
Taxes and shipping calculated at checkout

• Fill in the required fields with your details & complete the order process

• This will sync the customer with Marketo automatically and the tag will automatically be added to the customer account.
Updating Customers
This feature is available only for the site owner

- Open the customer page from admin

- Click on the Customer overview on the right side of the page
• Update the first or last name and then click **Save**

• Once done, customer details will automatically be updated on Marketo
Creating Orders

• Go to the homepage of the website

• Add products in the cart
• Click on the **Check out page**

<table>
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<tr>
<th>Product</th>
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</tbody>
</table>

- **Subtotal**: Rs. 179.00
- Taxes and shipping calculated at checkout

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep me up to date on news and exclusive offers</td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Shipping address</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name (optional)</td>
</tr>
<tr>
<td>Last name</td>
</tr>
<tr>
<td>Address</td>
</tr>
<tr>
<td>Apartment, suite, etc. (optional)</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Country/Region</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>PIN code</td>
</tr>
<tr>
<td>Phone (optional)</td>
</tr>
</tbody>
</table>

- **Shipping**: Calculated at next step
- **Taxes (estimated)**: Rs. 16.11
- **Total**: Rs. 195.11

• **Fill in the required fields with your details**

• **Complete the order process**

• Once done, customer Order will automatically be synced with Marketo and the tag will automatically be added to the customer account.
Updating Orders

- Open the order you want to update
- Increase or decrease the product quantity as required
- Send an invoice to the customer
- The updated order will now sync automatically with Marketo
Creating an Abandoned Cart

- In Shopify, an abandoned cart works when the customer adds the product in the cart & leaves the cart after placing the address.

**Steps are like:**
- Go to the checkout page > Add address > click on the payment option > close the window
- Visit the homepage of the website

- Add products in the cart
• And then click on the **Check out** button

![Check out button](image)

- Fill in the required fields with details

![Shipping address form](image)

- Click on the **Continue to shipping** button

![Continue to shipping button](image)
- Close the window.
- By doing this, the order will be sent to the abandoned cart orders

**App Sections: Dashboard**

- Credentials are saved in the Marketo configuration section (Marketo Rest Endpoint, Client ID, Client Secret)

- The second section installs Webhooks which shows that the webhooks are working fine
App Sections: Synced or Unsynchronized Customers

- In this section, all the customers of the store are listed and are segregated by synced or unsynced customers with Marketo.

- You can also sync unsynced customers in bulk from there as well.
App Sections: Logs

- In this section, you have the access to see all the orders, customers, abandoned carts that are synced with Marketo

- In this section, you will see the reorders for all customers orders and abandoned carts which are synced with Marketo

Bulk Orders Sync

- This provides you to access to sync orders in bulk from the orders page as well

Bulk Abandoned Cart Sync

- Cartiveo’s **Bulk Abandoned Cart** Sync option is automated by cron job which is setup before submitting it to Shopify for approval.

That’s it, you’re all set to automate business processes and accelerate conversions!
About Us:

Grazitti Interactive is a digital innovation leader, powering businesses of all sizes with its marketing automation, magento development, 3rd party integrations, and customizations, since 2008. Cartiveo our Shopify Marketo Integration Connector is one of the solutions created for aligning your Marketing and Sales operations. To know more about our solutions/digital services, write to us at info@grazitti.com.