



A Shopify Marketo Integration Connector

Table of Contents:

1	How to Install Cartiveo	2
2	Here's How You Can Start Using Cartiveo	2
3	Creating Customers	3
4	• From the Admin Panel	3
5	• From the Frontend	6
6	• As Guest Customer	8
7	Updating Customers	9
8	Creating an Abandoned Cart	15
9	App Sections: Dashboard	17
10	App Sections: Synced or Unsynchronized Customers	18
11	App Sections: Logs	19
12	Bulk Orders Sync	19
13	Bulk Abandoned Cart Sync	19
14	About Us	20

How to Install Cartiveo

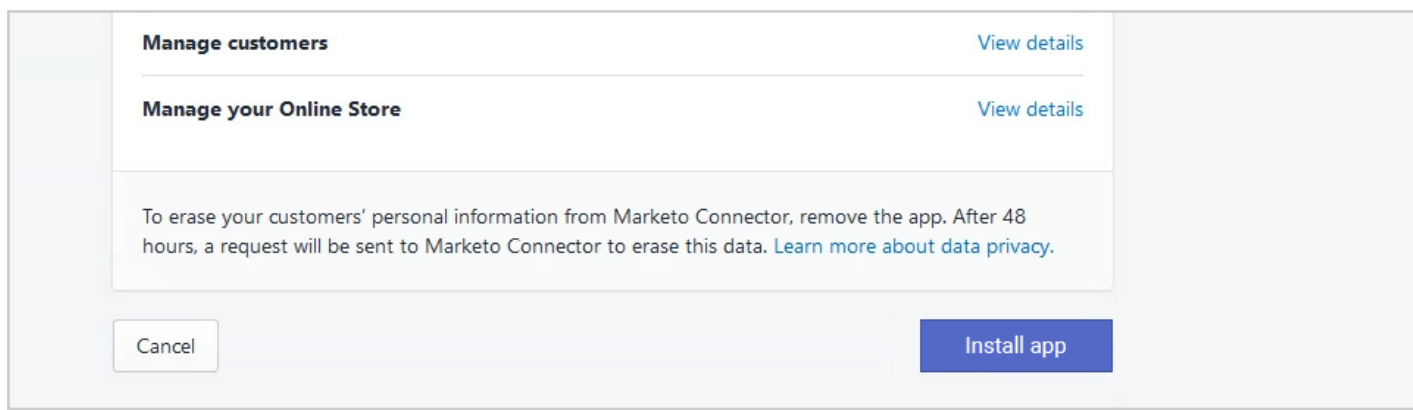
Sync your Shopify and Marketo seamlessly without any trouble.

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.



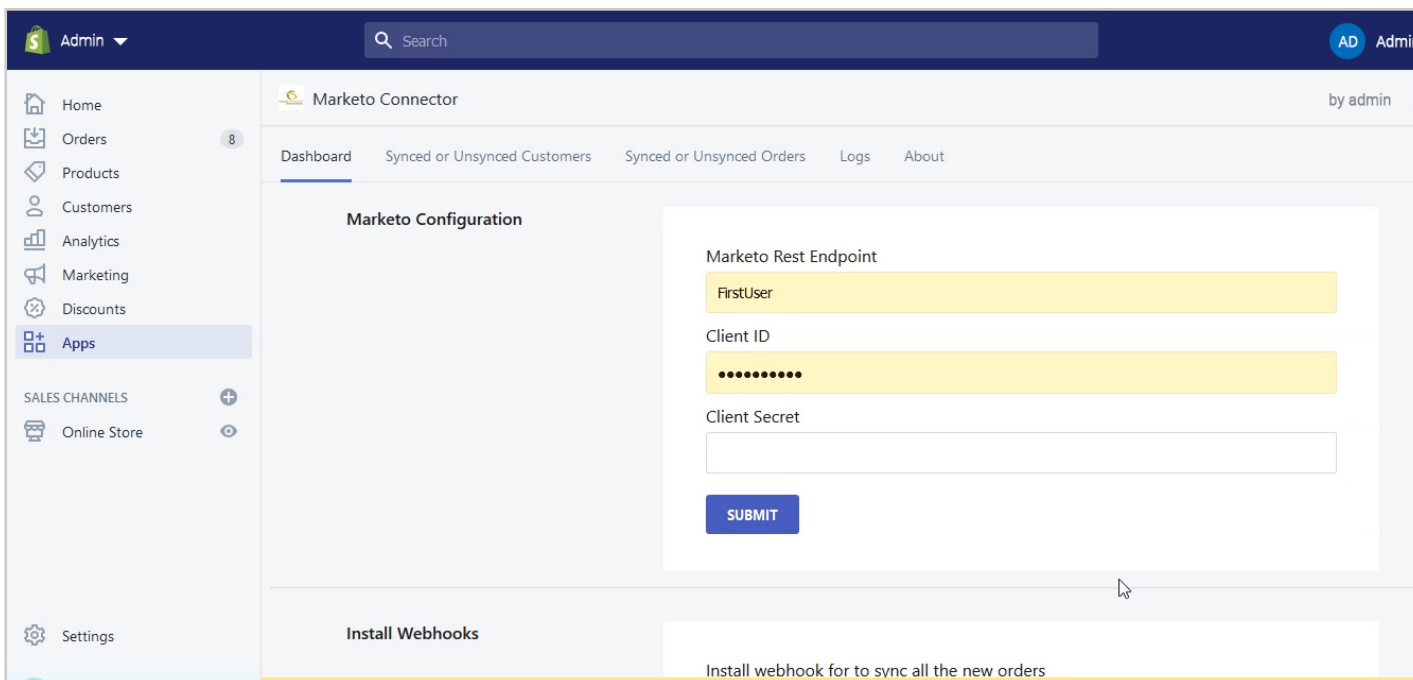
This screenshot shows a confirmation dialog for installing an app. It contains two sections: "Manage customers" and "Manage your Online Store", each with a "View details" link. Below these is a paragraph explaining that removing the app will erase customer data from Marketo Connector after 48 hours, with a link to "Learn more about data privacy". At the bottom are "Cancel" and "Install app" buttons.

Manage customers [View details](#)

Manage your Online Store [View details](#)

To erase your customers' personal information from Marketo Connector, remove the app. After 48 hours, a request will be sent to Marketo Connector to erase this data. [Learn more about data privacy.](#)

Step 2: Add credentials in Marketo configuration section (Marketo Rest Endpoint, Client ID, Client Secret) and click Submit.



This screenshot shows the "Marketo Connector" configuration page within the Shopify Admin interface. The left sidebar lists various admin sections, with "Apps" selected. The main content area has tabs for "Dashboard", "Synced or Unsynced Customers", "Synced or Unsynced Orders", "Logs", and "About". The "Marketo Configuration" section contains three input fields: "Marketo Rest Endpoint" (pre-filled with "FirstUser"), "Client ID" (masked with dots), and "Client Secret" (empty). A "SUBMIT" button is located below these fields. At the bottom, there is a section for "Install Webhooks" with a message: "Install webhook for to sync all the new orders".

Admin Search Admin

Home Orders Products Customers Analytics Marketing Discounts Apps SALES CHANNELS Online Store Settings

Marketo Connector by admin

Dashboard Synced or Unsynced Customers Synced or Unsynced Orders Logs About

Marketo Configuration

Marketo Rest Endpoint
FirstUser

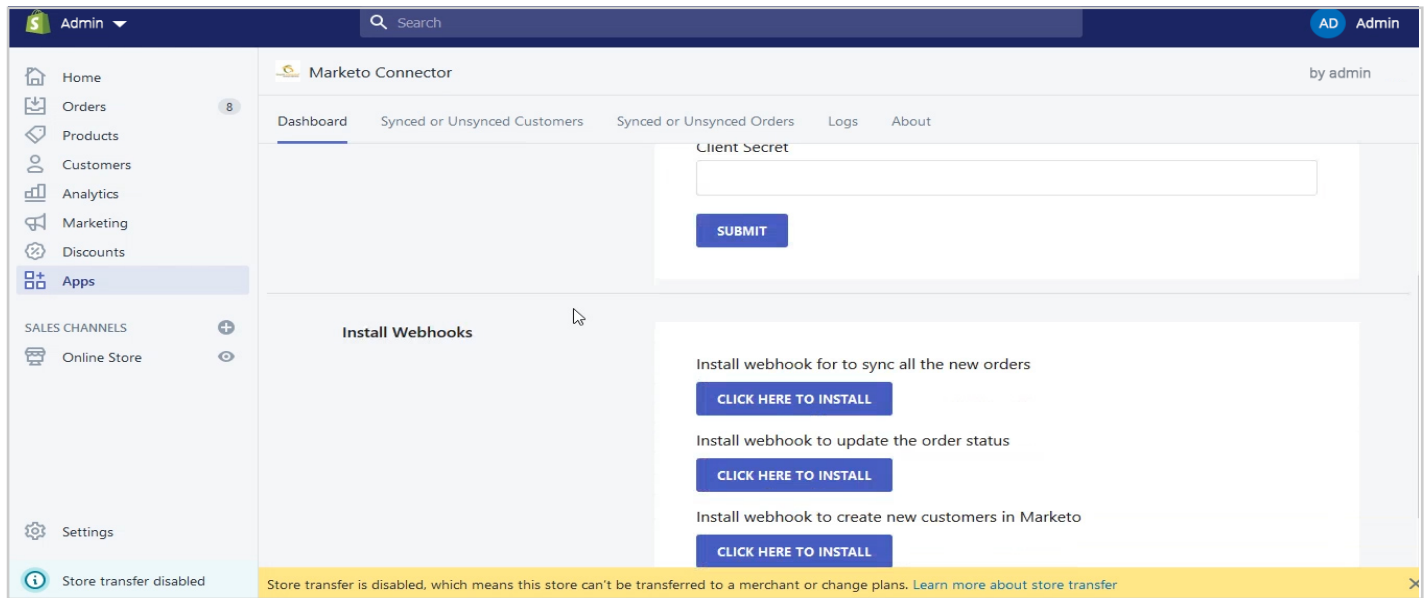
Client ID
.....

Client Secret

Install Webhooks

Install webhook for to sync all the new orders

Step 3: Install webhooks that are responsible for making an automated connection between Marketo and Shopify while creating orders and customers.

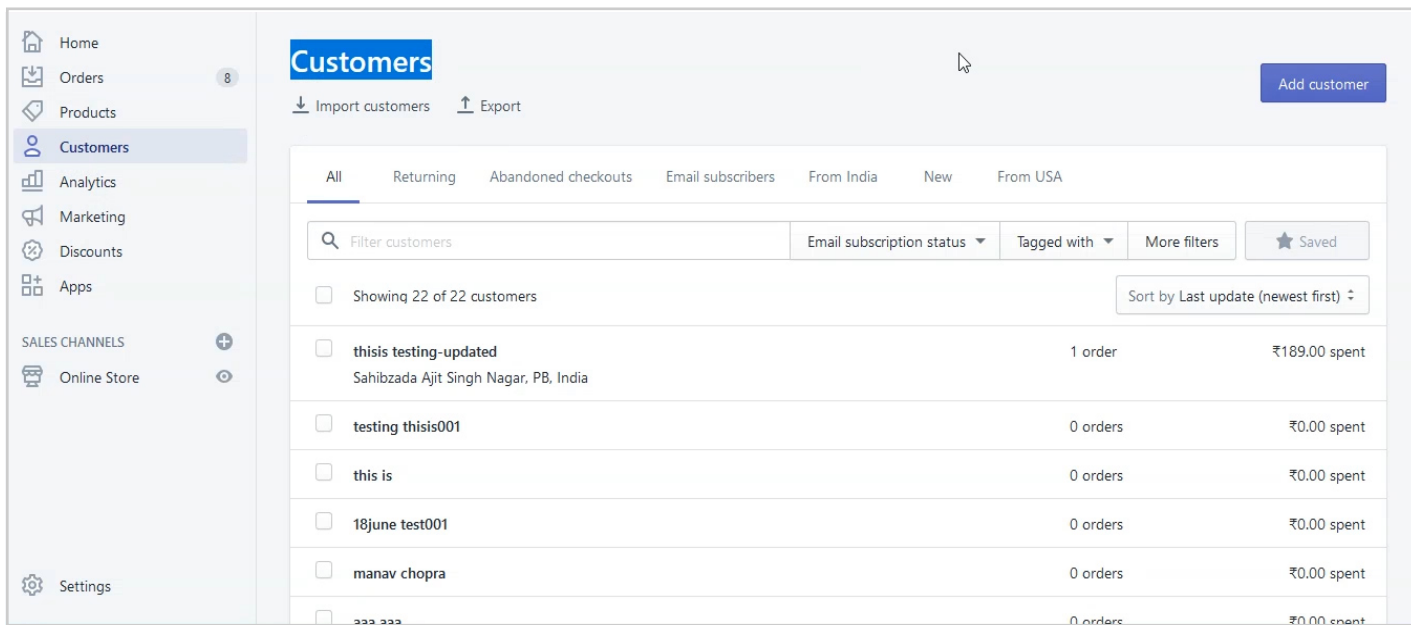


Creating Customers

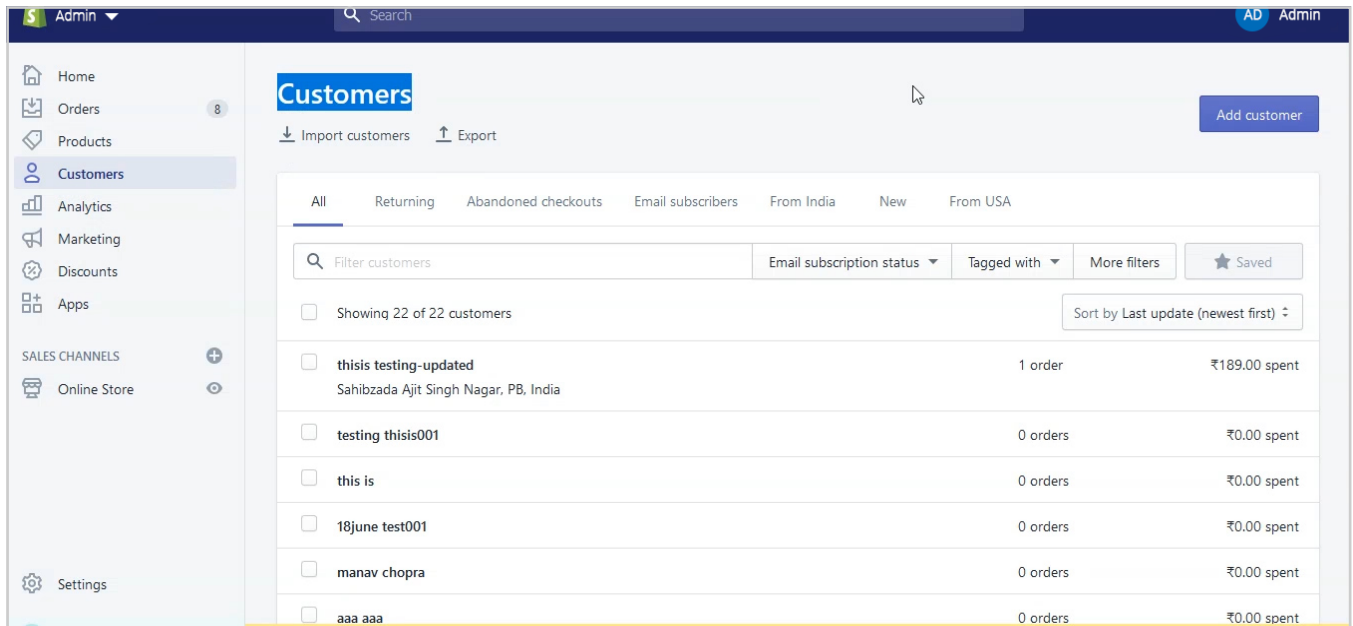
Shopify offers 3 ways to create customers.

1. From the Admin Panel

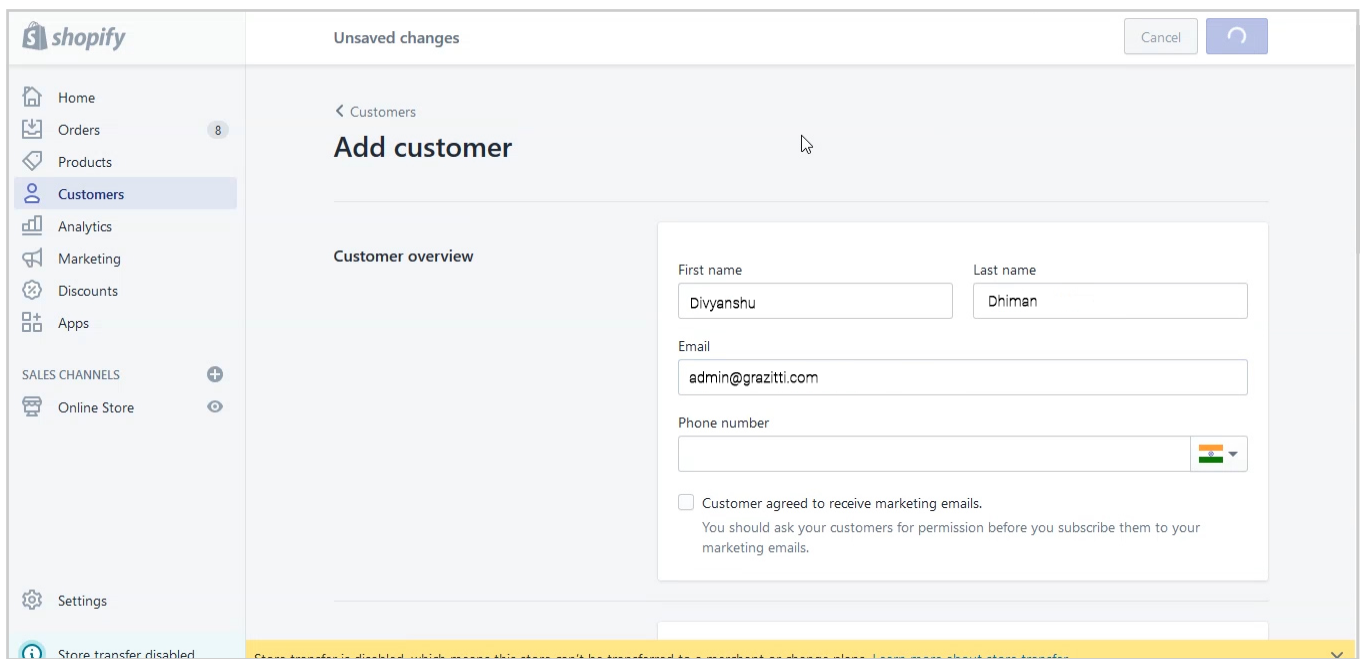
- Click on Customers on the left side of the **Admin Page**



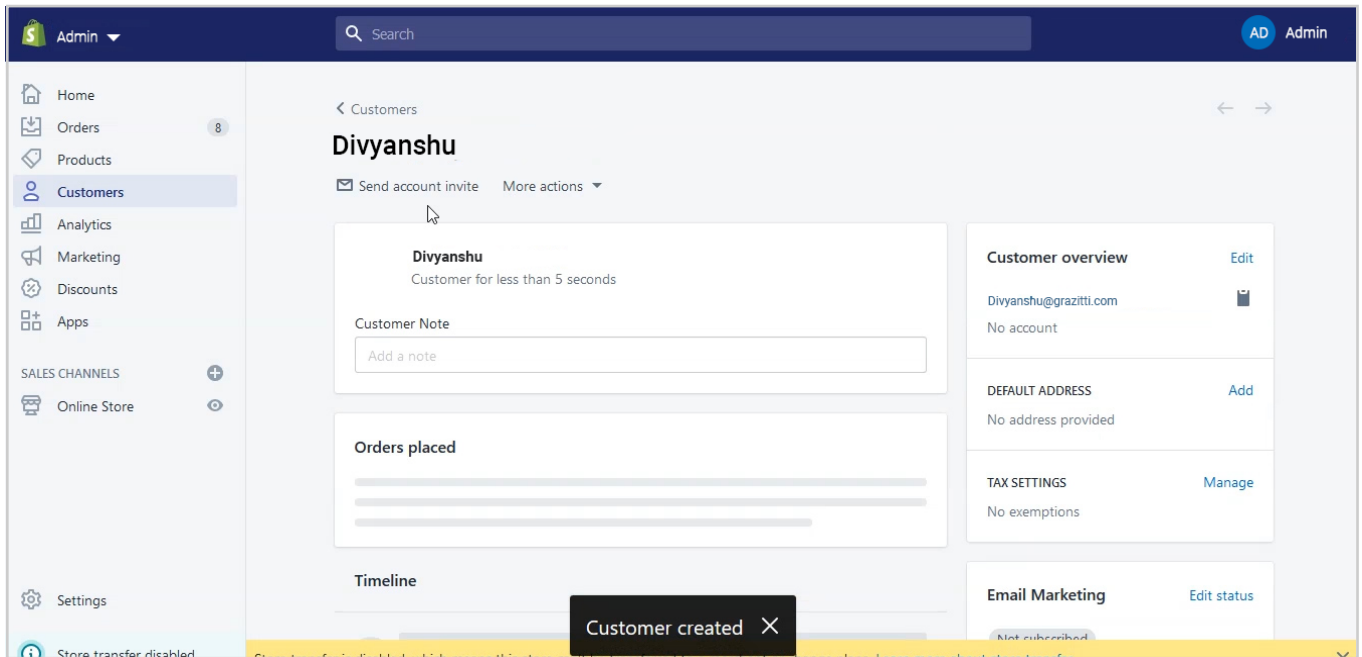
- Click on **Add customer** on the top right corner of the page



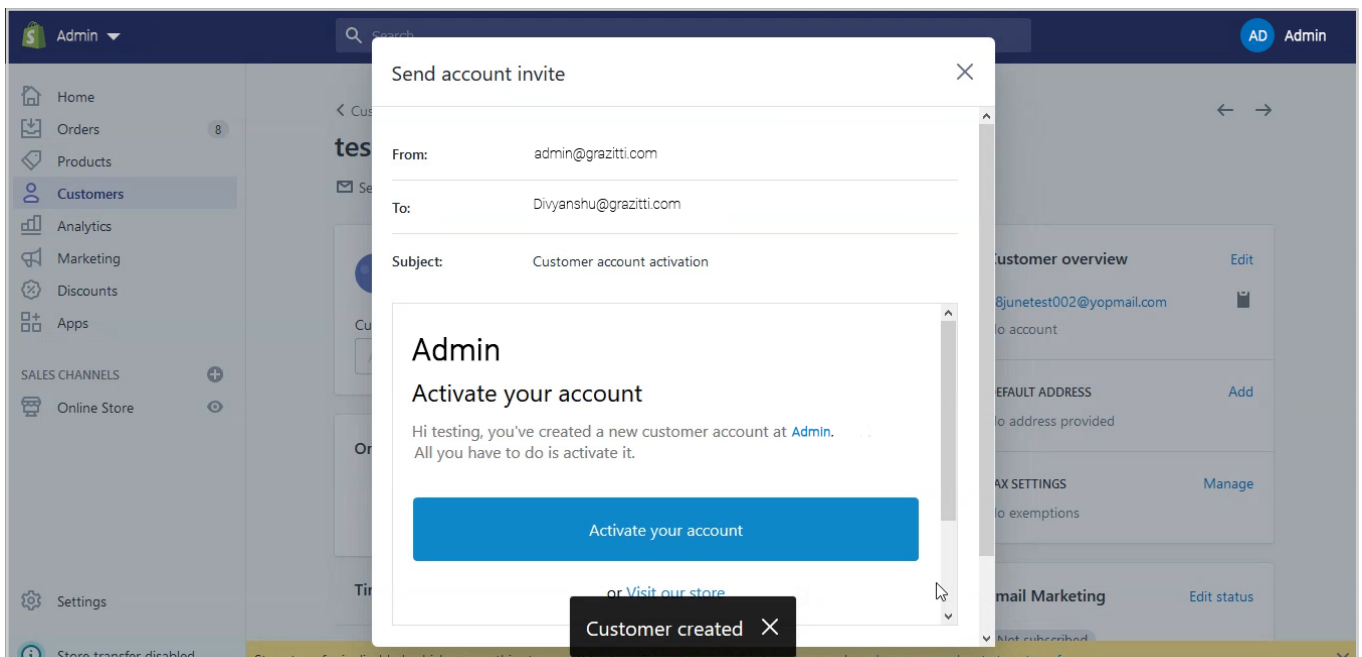
- Add First Name, Last Name, E mail id in the provided fields.



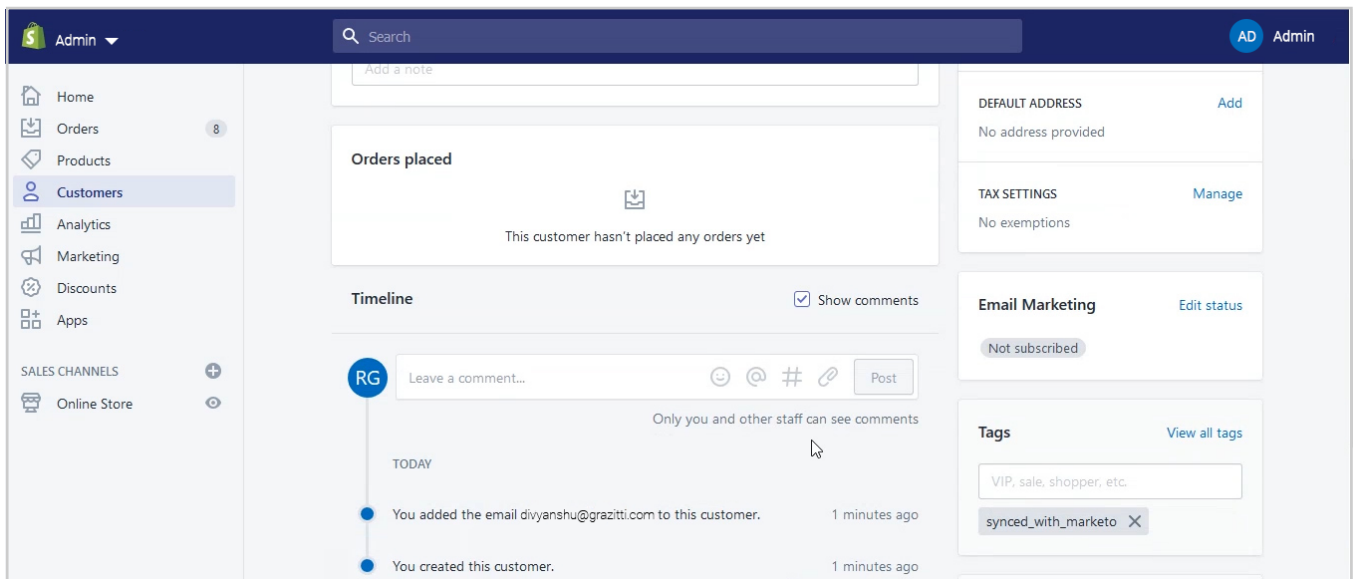
- Click on **Send account invite** to the customer



- Customer will receive email and when customer clicks Activate account from email then he has to add password for that account and submit

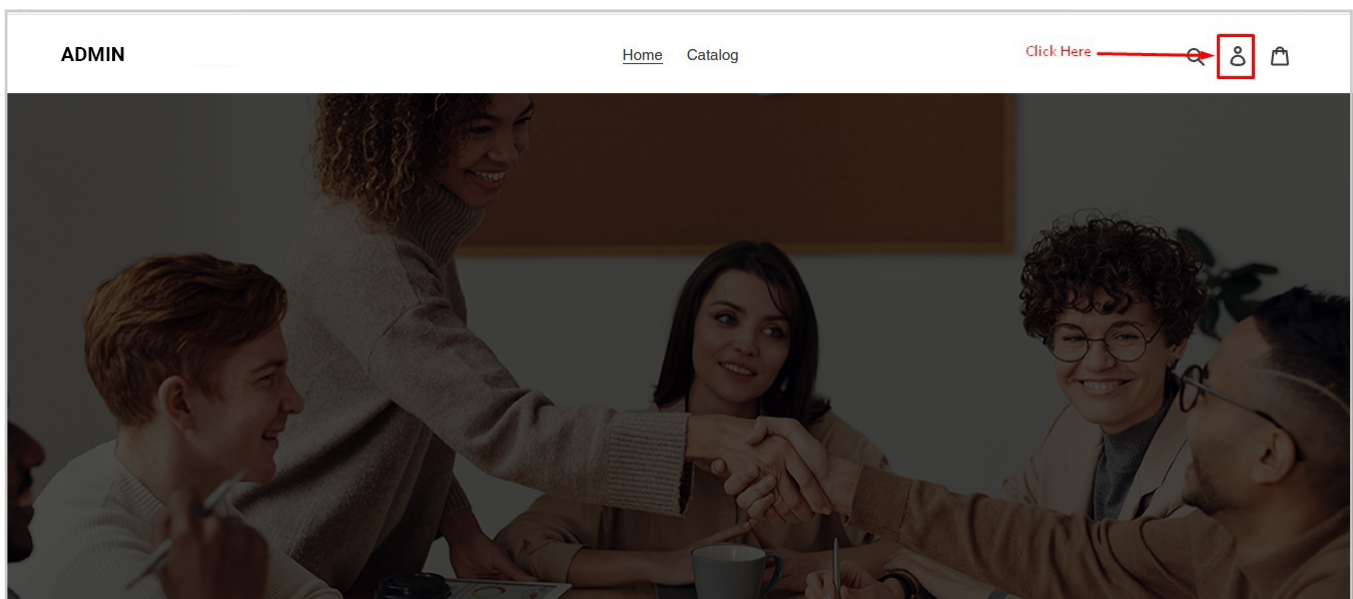


- Once done, the That customer will be automatically synced with Marketo and the tag will automatically be assigned to the customer account.



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**

ADMIN

Men women Store Locator - Admin

Login

Email

Password

Sign In

Return to Store

Forgot your password?

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

ADMIN

Men women Store Locator - atulgrazitti

Create Account

Divyanshu

Dhiman

Divyanshu@grazitti.com

.....

Create

- 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.

Admin

Search

AD Admin

Home

Orders

Products

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online Store

Customers

Divyanshu Dhiman

Disable account Reset password More actions

Divyanshu Dhiman

Customer for less than 20 seconds

Customer Note

Add a note

Orders placed

This customer hasn't placed any orders yet

Customer overview

Divyanshu@grazitti.com

Has an account

DEFAULT ADDRESS

No address provided

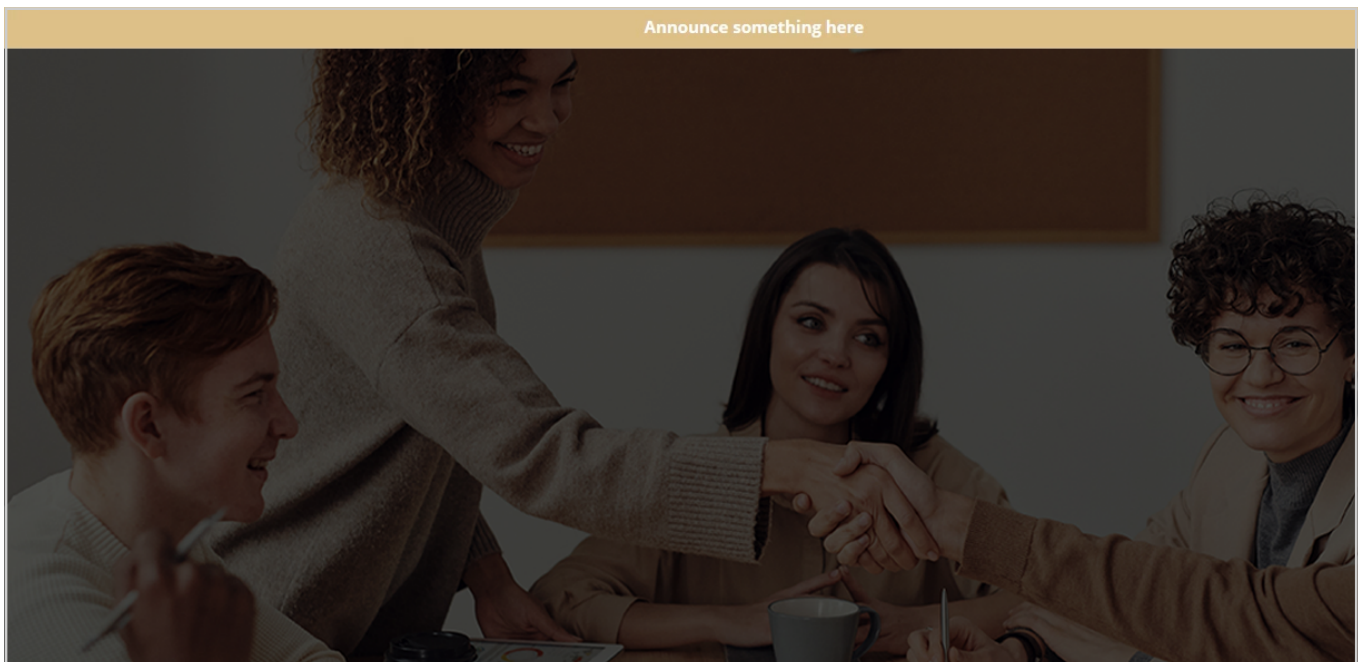
TAX SETTINGS

No exemptions

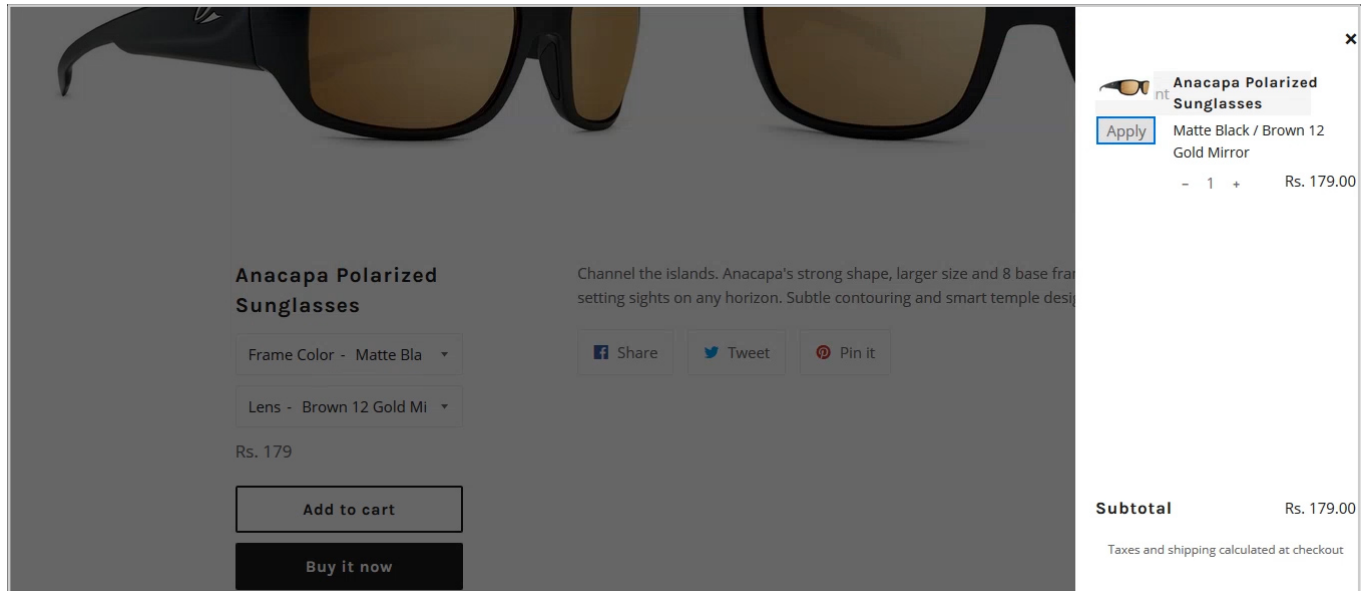
3. As Guest Customer

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

Product	Price	Quantity	Total
 Anacapa Polarized Sunglasses Matte Black / Brown 12 Gold Mirror Remove	Rs. 179.00	- 1 +	Rs. 179.00

Subtotal Rs. 179.00
Taxes and shipping calculated at checkout

[Check out](#)

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

☐ Keep me up to date on news and exclusive offers

Shipping address

First name (optional)
Divyanshu

Last name
Dhiman

Address
#198 Grazitti Interactive, Ground Floor, Panchkula

Apartment, suite, etc. (optional)

City
Haryana

Country/Region
India

State
Haryana

PIN code
134014

Phone (optional) ?

☐ Save this information for next time

[Return to cart](#)
[Continue to shipping](#)

Subtotal

Rs. 179.00

Shipping

Calculated at next step

Taxes (estimated)

Rs. 16.11

Total

Rs. 195.11

- This will sync the customer with Marketo automatically and the tag will automatically be added to the customer account.

Admin

Search

AD Admin

Home

Orders 8

Products

Customers

Analytics

Marketing

Discounts

Apps

SALES CHANNELS

Online Store

Add a note

Orders placed

This customer hasn't placed any orders yet

Timeline

RG

Leave a comment...

😊

@

#

🔗

Post

Only you and other staff can see comments

TODAY

You added the email divyanshu@grazitti.com to this customer.

1 minutes ago

You created this customer.

1 minutes ago

DEFAULT ADDRESS

No address provided

Add

TAX SETTINGS

No exemptions

Manage

Email Marketing

Not subscribed

Edit status

Tags

View all tags

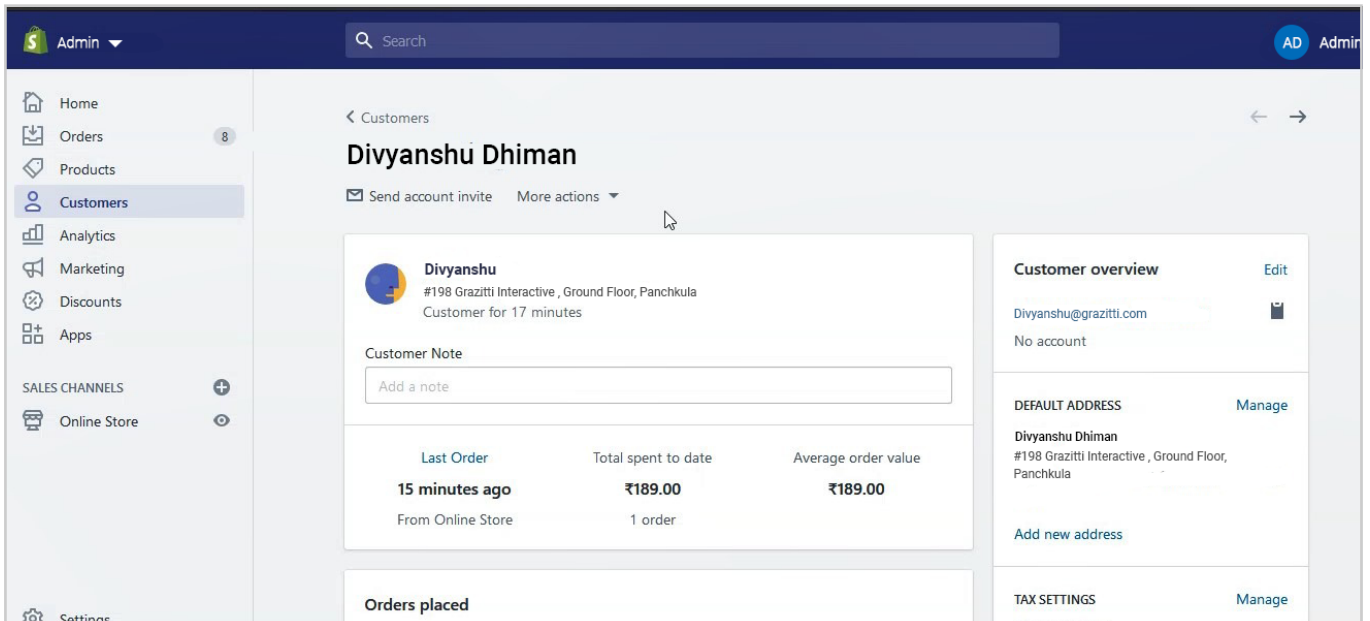
VIP, sale, shopper, etc.

synced_with_marketo X

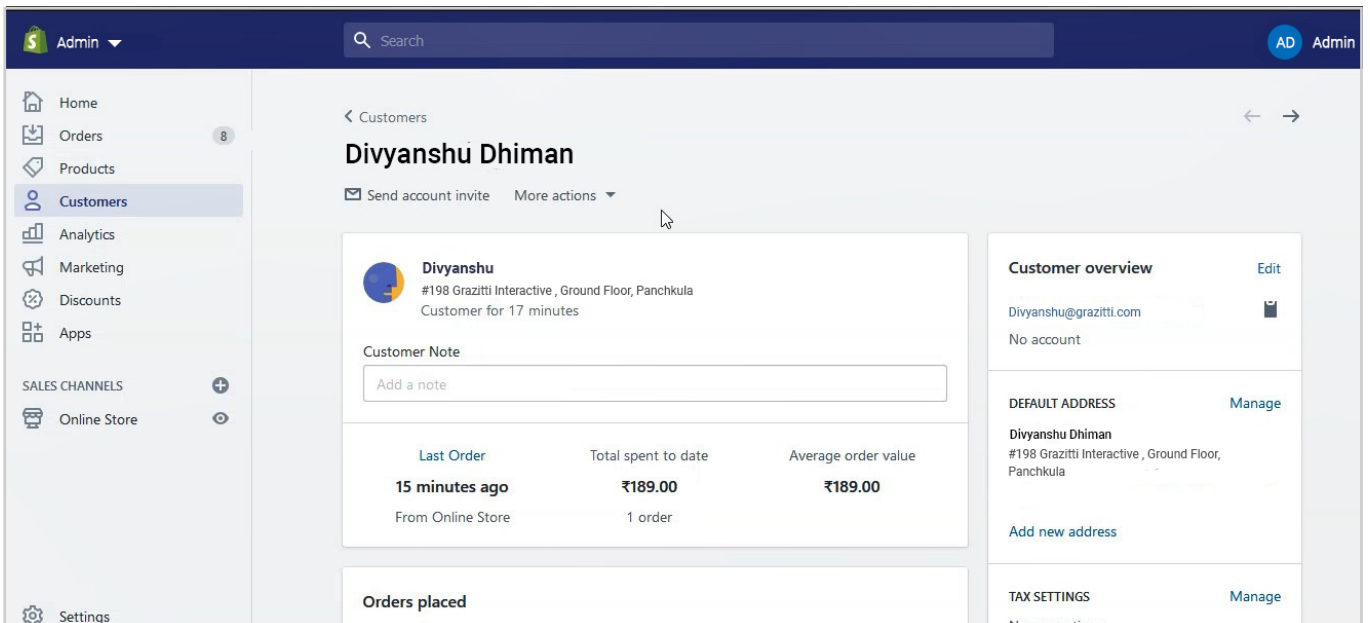
Updating Customers

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**

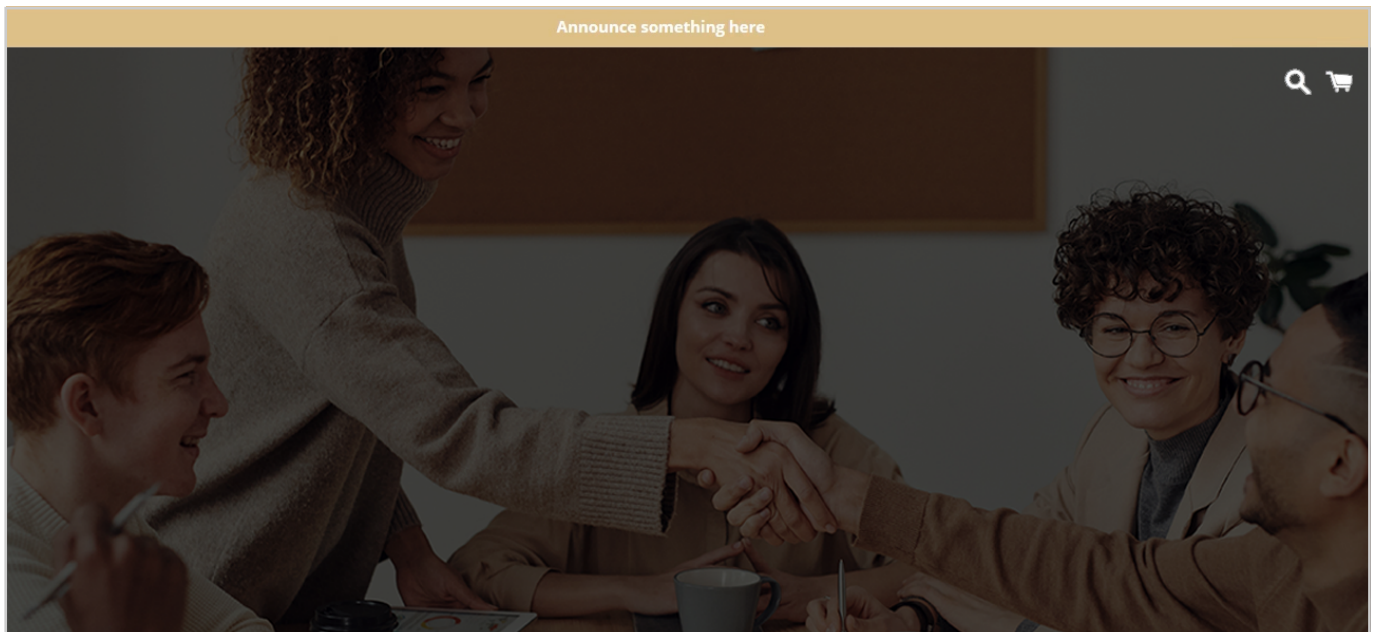
The screenshot shows a CRM interface with a sidebar on the left containing navigation links: Home, Orders (8), Products, Customers (selected), Analytics, Marketing, Discounts, Apps, SALES CHANNELS, Online Store, and Settings. The main area displays a modal titled 'Edit customer' with the following fields: First Name (Divyanshu), Last Name (Dhiman), Email (Divyanshu@grazitti.com), and Phone number (empty). A dropdown menu for the phone number shows the Indian flag. At the bottom of the modal are 'Cancel' and 'Save' buttons. In the background, a 'Customer overview' card is visible, showing the customer's name, email, and address.

- Once done, customer details will automatically be updated on Marketo

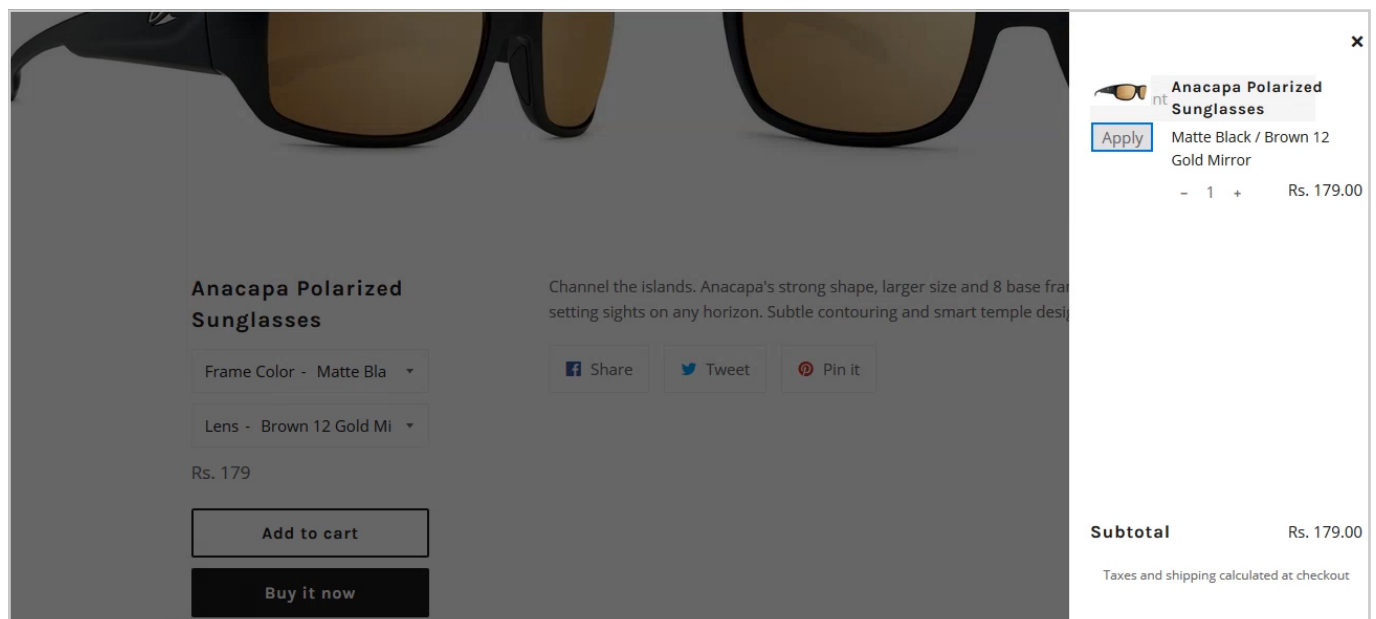
The screenshot shows a Marketo record for 'thisis testing-updated'. The top navigation bar includes 'Custom', 'Info' (selected), 'Company Info', 'Opportunity Info', 'Microsoft Standard Field', 'Microsoft Custom Fields', 'Custom Objects', and 'Activity Log'. The 'Info' tab displays various fields: Microsoft Created Date, Microsoft Type, Person Score, Urgency, Priority, Relative Score, Relative Urgency, Revenue Cycle Model (Grazitti Marketing Success Model > Known), Salutation, First (Divyanshu), Middle, Last (Dhiman), Email (Divyanshu@grazitti.com), Job Title, and Phone. The record is auto-saved with no changes.

Creating Orders


- Go to the homepage of the website



- Add products in the cart



- Click on the **Check out page**

Product	Price	Quantity	Total
 Anacapa Polarized Sunglasses Matte Black / Brown 12 Gold Mirror Remove	Rs. 179.00	- 1 +	Rs. 179.00

Subtotal Rs. 179.00
Taxes and shipping calculated at checkout

Check out

- Fill in the required fields with your details

☐ Keep me up to date on news and exclusive offers

Shipping address

First name (optional)
Divyanshu

Last name
Dhiman

Address
#198 Grazitti Interactive , Ground Floor, Panchkula

Apartment, suite, etc. (optional)

City
Haryana

Country/Region
India

State
Haryana

PIN code
134014

Phone (optional) ?

☐ Save this information for next time

[Return to cart](#)
[Continue to shipping](#)

Subtotal	Rs. 179.00
Shipping	Calculated at next step
Taxes (estimated)	Rs. 16.11
Total	Rs. 195.11

- 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.

The screenshot displays the Admin interface for an e-commerce system. The top navigation bar includes a search bar and the user's name 'Admin'. The left sidebar lists various management options: Home, Orders (with a count of 8), Drafts, Abandoned checkouts, Products, Customers, Analytics, Marketing, Discounts, Apps, and Sales Channels (Online Store). The main content area shows the details of an order for 'Divyanshu Dhiman' placed on June 18, 2020, at 3:50 am from the Online Store. The order status is 'Unfulfilled' and 'Payment pending'. The order contains one item: 'Anacapa Polarized Sunglasses' (Matte Black / Brown 12 Gold Mirror, SKU: 043MBMBGNB12ME) priced at Rs. 179.00. A 'Mark as fulfilled' button is visible. The right sidebar contains sections for 'Notes' (No notes from customer), 'Customer' (Divyanshu, 1 order), and 'CONTACT INFORMATION' (Divyanshu@grazitti.com, No phone number).

Updating Orders

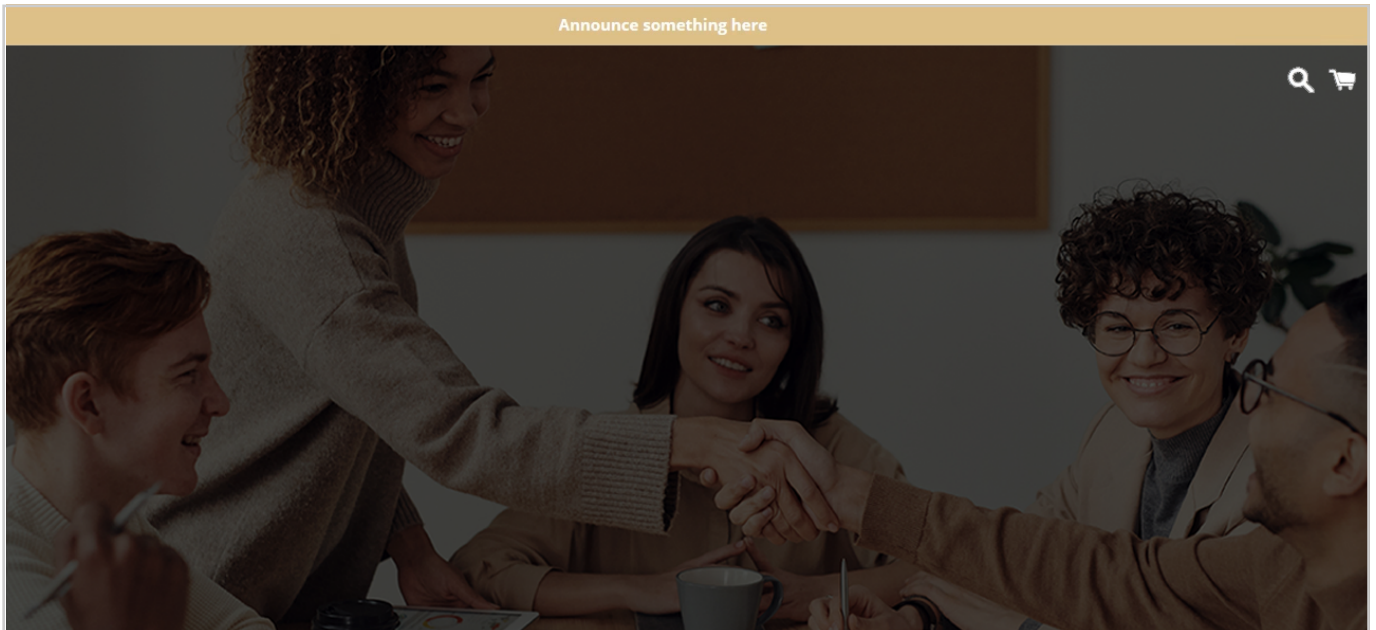
- Open the order you want to update
- Increase or decrease the product quantity as required
- Send an invoice to the customer
- The updated order will now sync automatically with Marketo

Creating an Abandoned Cart

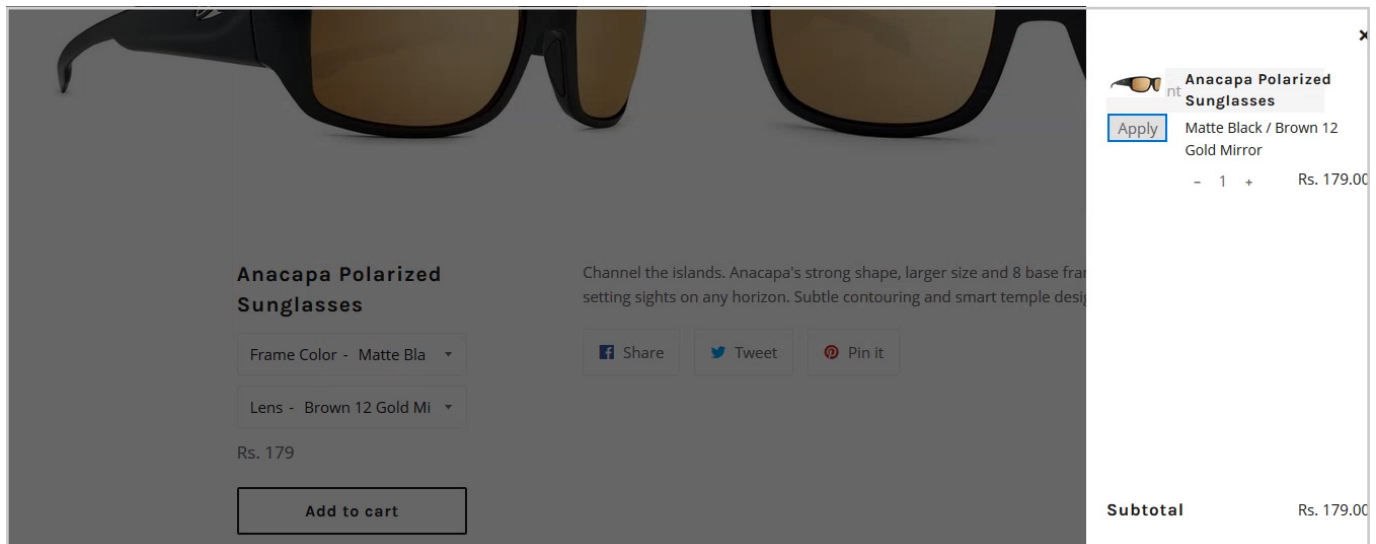
- In Shopify, an abandoned cart works when the customer adds the product in the cart & leaves the cart after placing the address.

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

ADMIN

Men

women

Store Locator - Admin

Product	Price	Quantity	Total
 <div> Anacapa Polarized Sunglasses Matte Black / Brown 12 Gold Mirror Remove </div>	Rs. 179.00	- 1 +	Rs. 179.00

Subtotal

Rs. 179.00

Taxes and shipping calculated at checkout

Check out

- Fill in the required fields with details

Shipping address

First name (optional)

Divyanshu

Last name

Dhiman

Address

#198 Grazitti Interactive , Ground Floor, Panchkula

Apartment, suite, etc. (optional)

City

Haryana

Country/Region

India

State

Haryana

PIN code

134014

Phone (optional)

☐ Save this information for next time

< Return to cart

Continue to shipping

Taxes (estimated)

Rs. 16.11

Total

Rs. 195.11

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

Shipping address

First name (optional)

Divyanshu

Last name

Dhiman

Address

#198 Grazitti Interactive , Ground Floor, Panchkula

Apartment, suite, etc. (optional)

City

Haryana

Country/Region

India

State

Haryana

PIN code

134014

Phone (optional)

☐ Save this information for next time

< Return to cart

Continue to shipping

Subtotal

Rs. 179.00

Shipping

Calculated at next step

Taxes (estimated)

Rs. 16.11

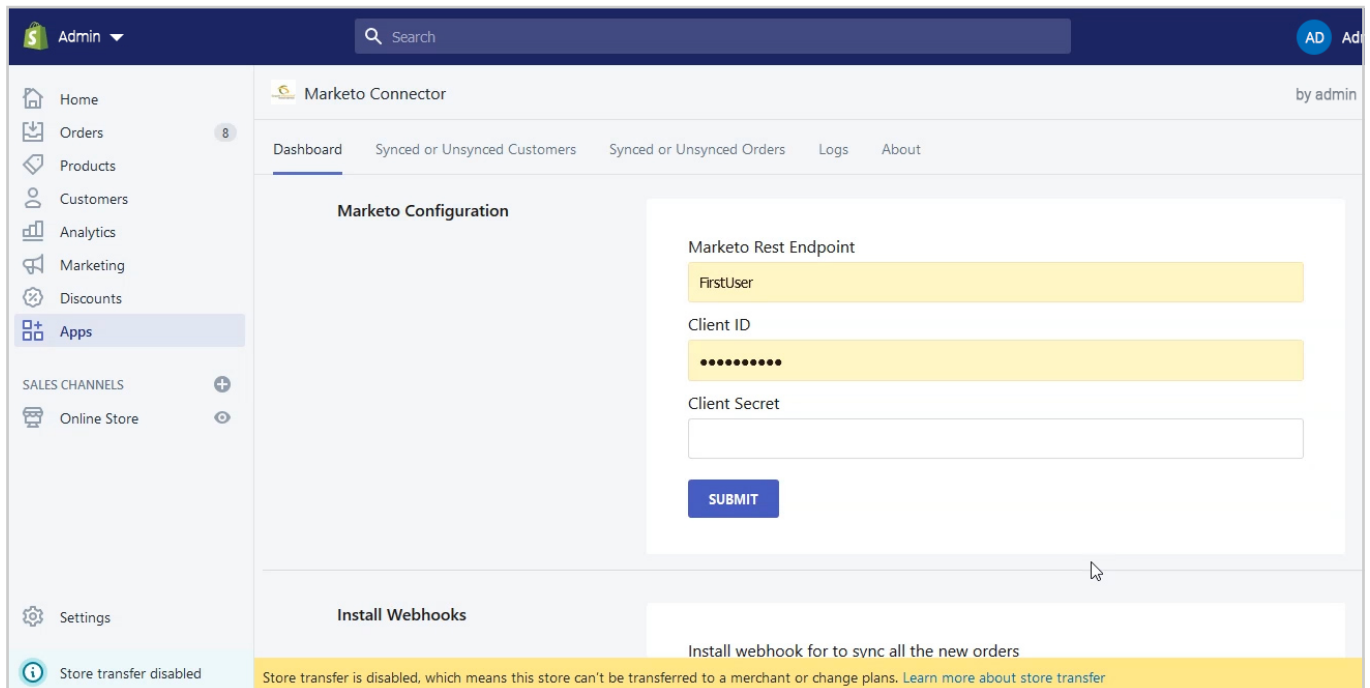
Total

Rs. 195.11

- Close the window.
- By doing this, the order will be sent to the abandoned cart orders

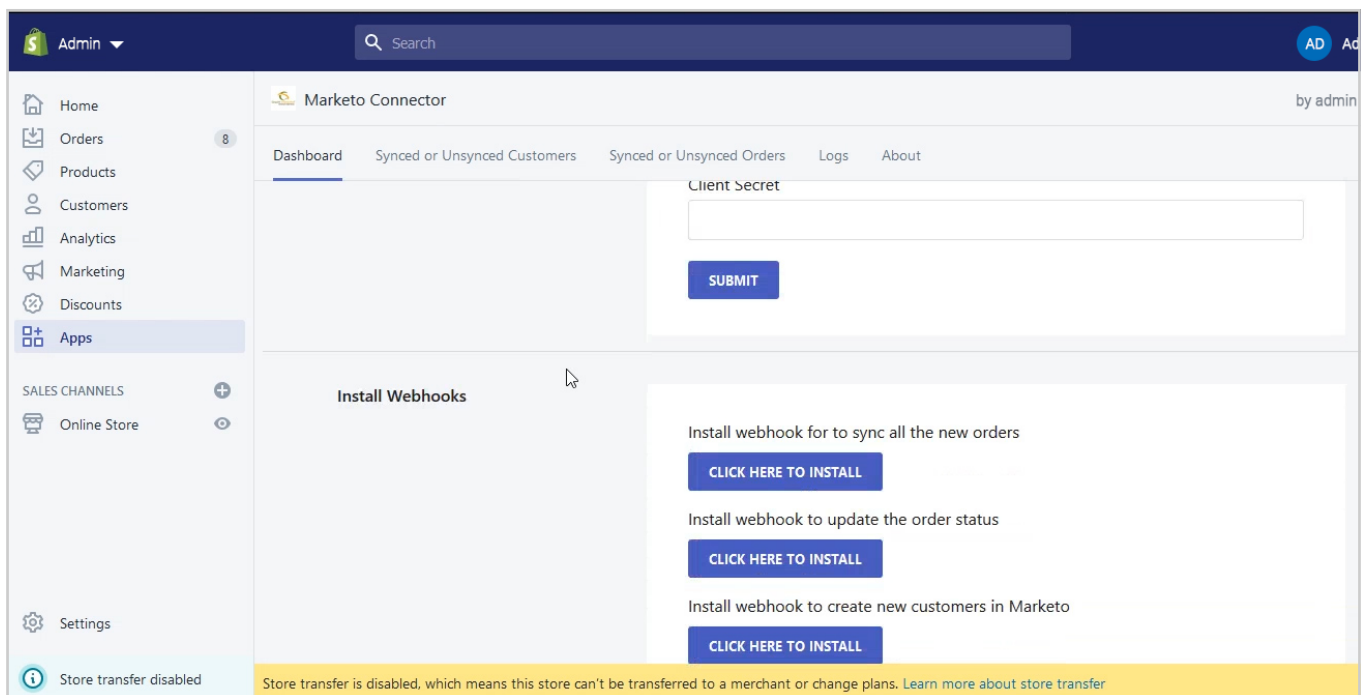
App Sections: Dashboard

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



The screenshot shows the 'Admin' dashboard with the 'Apps' section selected. The 'Marketo Connector' app is installed, and the 'Dashboard' tab is active. The 'Marketo Configuration' section contains three input fields: 'Marketo Rest Endpoint' (containing 'FirstUser'), 'Client ID' (containing a masked value '.....'), and 'Client Secret' (empty). A 'SUBMIT' button is located below these fields. The 'Install Webhooks' section is partially visible at the bottom, showing the text 'Install webhook for to sync all the new orders'. A yellow banner at the bottom of the page states: 'Store transfer is disabled, which means this store can't be transferred to a merchant or change plans. [Learn more about store transfer](#)'.

- The second section installs Webhooks which shows that the webhooks are working fine



This screenshot shows the 'Marketo Connector' app configuration page, specifically the 'Install Webhooks' section. The 'Client Secret' input field is visible at the top, with a 'SUBMIT' button below it. The 'Install Webhooks' section contains three options, each with a 'CLICK HERE TO INSTALL' button:

- Install webhook for to sync all the new orders
- Install webhook to update the order status
- Install webhook to create new customers in Marketo

 The same yellow banner at the bottom of the page is present: 'Store transfer is disabled, which means this store can't be transferred to a merchant or change plans. [Learn more about store transfer](#)'.

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.

The screenshot shows the 'Marketo Connector' interface with the 'Synced or Unsynchronized Customers' tab selected. A table lists customer data with columns for selection, name, email, order count, spent amount, and sync status. A 'Sync Status' dropdown is in the top right of the table area.

	Customer Name	Email ID	Order Count	Spent	Sync Unsync Status
<input type="checkbox"/>	thhhiss issss Chandigarh, CH, India	thisssissstessting@yopmail.com	0	₹0.00 spent	✓
<input type="checkbox"/>	testinguser ttt ..	testinguserttt@yopmail.com	0	₹0.00 spent	✓
<input type="checkbox"/>	testing 18junetest002 ..	18junetest002@yopmail.com	0	₹0.00 spent	✓
<input type="checkbox"/>	thisis testing- undated	testingthisis004@yopmail.com	1	₹189.00 spent	✓

- You can also sync unsynced customers in bulk from there as well

This screenshot shows the same Marketo Connector page, but with a confirmation dialog box open over the table. The dialog asks for confirmation to sync customers with Marketo. Additionally, a yellow banner at the bottom indicates that store transfer is disabled.

The page at <https://api.grazitti.com> says:
Are you sure you want to sync these Customers with Marketo?

OK Cancel

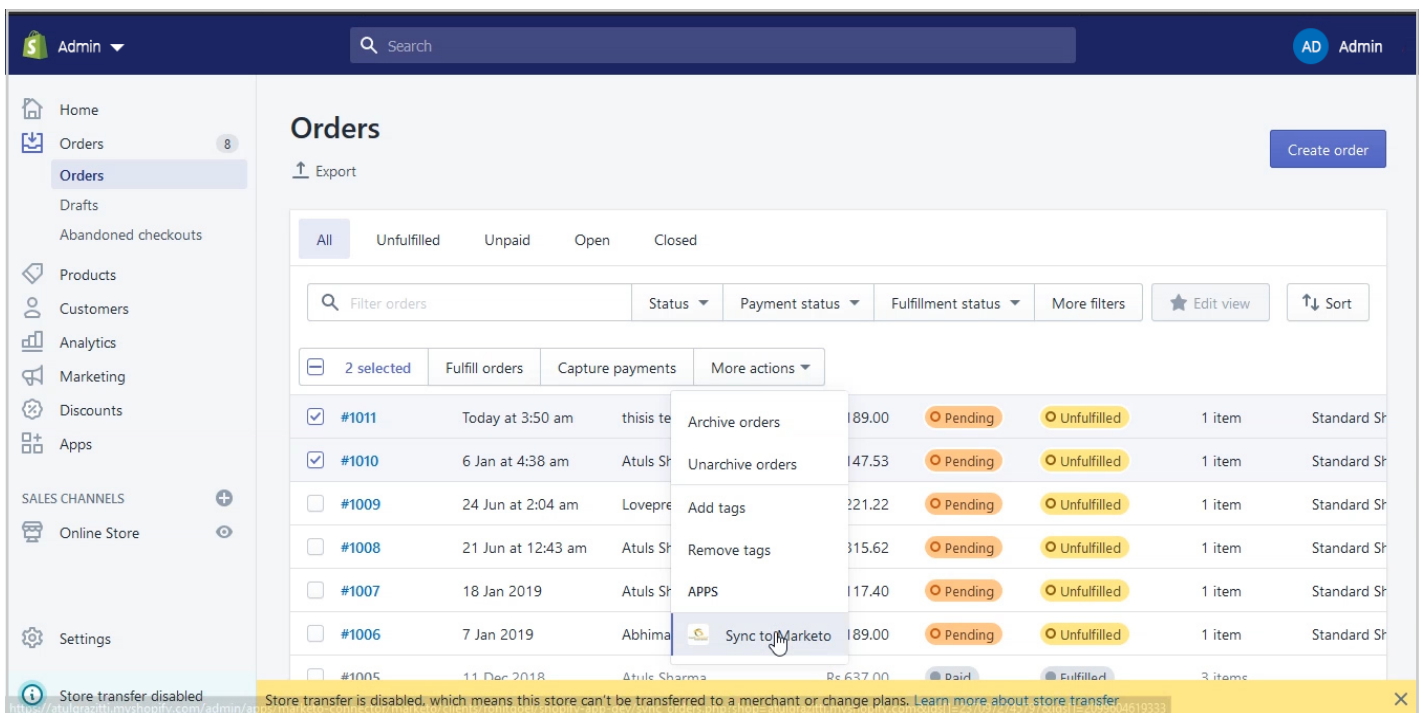
Store transfer is disabled, which means this store can't be transferred to a merchant or change plans. [Learn more about store transfer](#)

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.

