



Marketing Tools Overview

Shopify Forms

Capture more leads

Let's be friends ❤️
Get 15% off your first order.
Join our mailing list to hear about new arrivals and promos.

First name
Email
Birthday
MM DD YYYY
Subscribe

Title
B I Let's be friends ❤️ 19/50

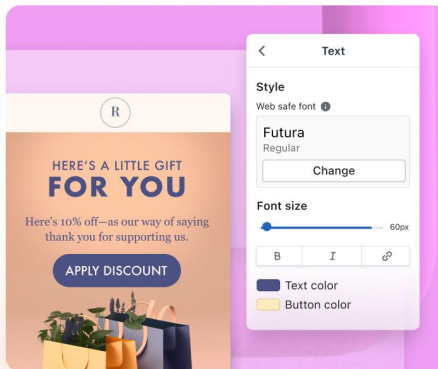
Discount
JOINUS15 15% off order Change

Content
B I Get 15% off your first order. Join our mailing list to hear about new arrivals and promos. 90/100

Styling
Futura

Shopify Email

Email marketing made easy



Segmentation

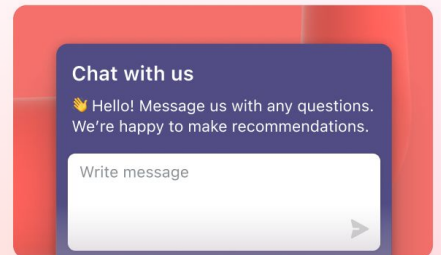
Personalize with data

Customer segment: High Value Plant Purchasers
43,010 customers 100% of customer base
amount_spent > 500 AND products_purchased (tag:'plant') = true
Valid segment

Customer name	Status	Location	Orders
Milly Doe	Subscribed	New York City	12 orders

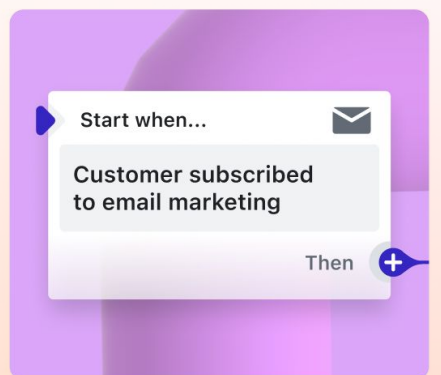
Shopify Inbox

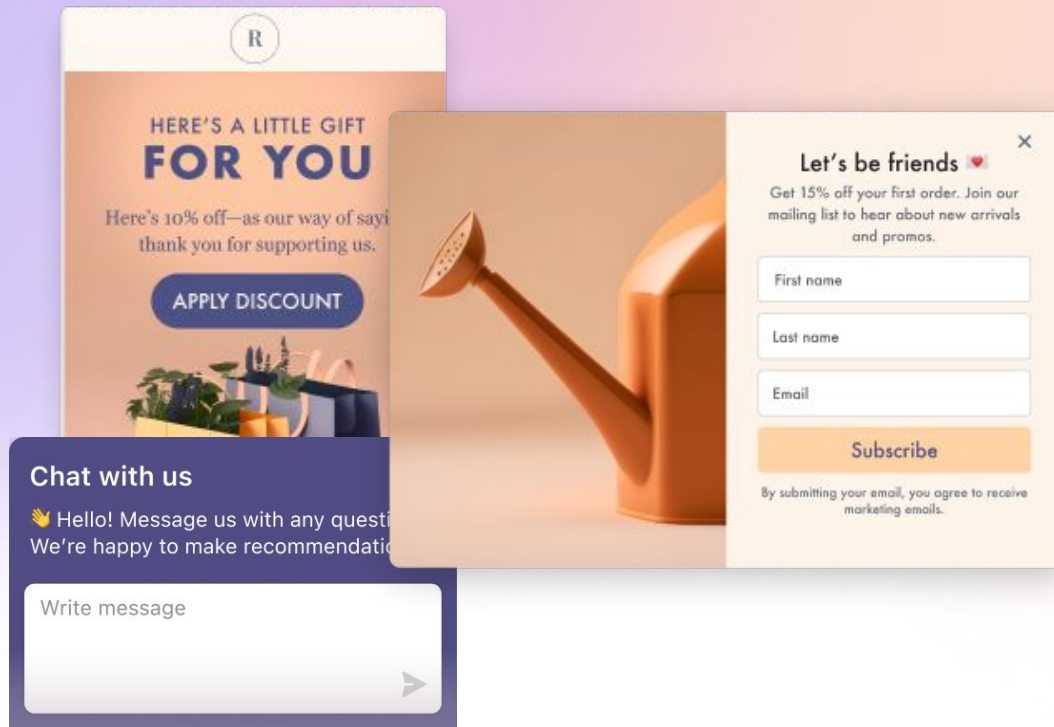
Chats that convert



Automations

Marketing on autopilot





Introduction

Marketing is consistently one of the top challenges merchants face when they're starting and running their business. How do I set up email marketing? What should I say in my abandoned cart emails? How can I convert more store visitors to subscribers and sales?

Shopify has tools to solve those issues and more—and they're all free when you're getting started. As an affiliate, you can show your audience how Shopify Marketing Tools work together and scale your referrals while you're at it.

In this guide, we'll be covering how these tools work together to power marketing strategies across email, automations, lead capture, and more.

What's in the Guide:

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Shopify Marketing Tools



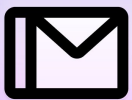
Shopify Forms

Capture more leads



Shopify Inbox

Chats that convert



Shopify Email

Email marketing made easy



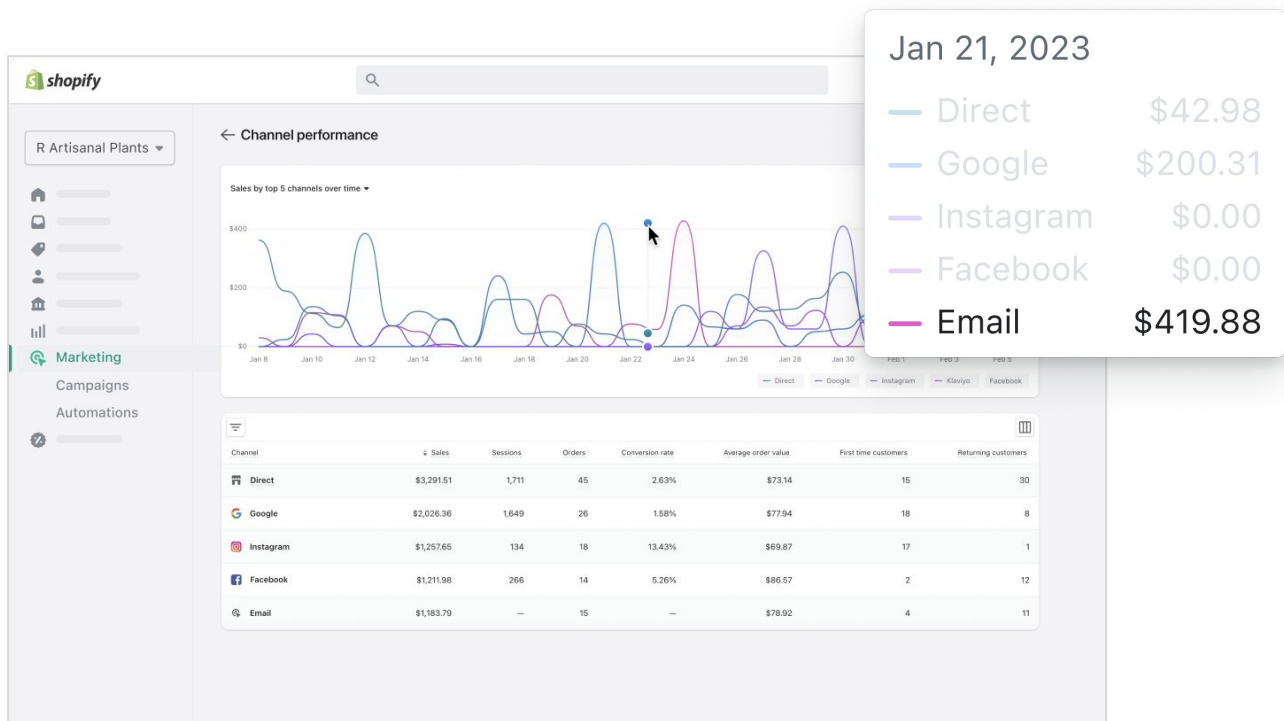
Marketing Automations

Marketing on autopilot



Segmentation

Personalize with data

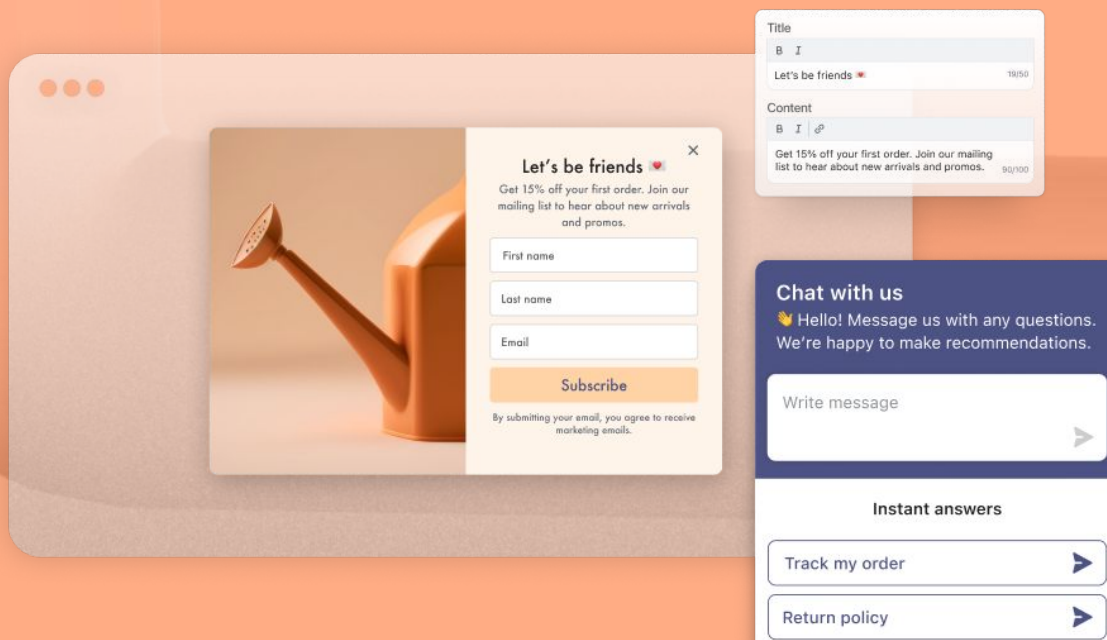


Why does marketing matter?

Marketing is a critical business function, and something every store owner has questions about. As an affiliate, it's easy for you to convey how important it is to nail your marketing, meaning your audience is more likely to convert through your content.

It's also never been more top of mind. Acquiring customers is expensive and time-consuming, so your audience wants to know they're making the most of every visitor to their website by capturing and nurturing leads so they turn into profitable, repeat customers. That's what Shopify Marketing Tools help with, with free options for lead capture, email marketing, marketing automations, and segmentation.

Everything your audience needs, without any extra monthly subscription fees.



Capturing more leads with Forms and Inbox

Your audience knows getting people to their store is expensive, whether they're running ads, working with influencers, investing in SEO, or all of the above. That's why optimizing a store to capture leads is so critical—once your audience has a customer's email address, they can reach them again and build a relationship without spending more money on ads.

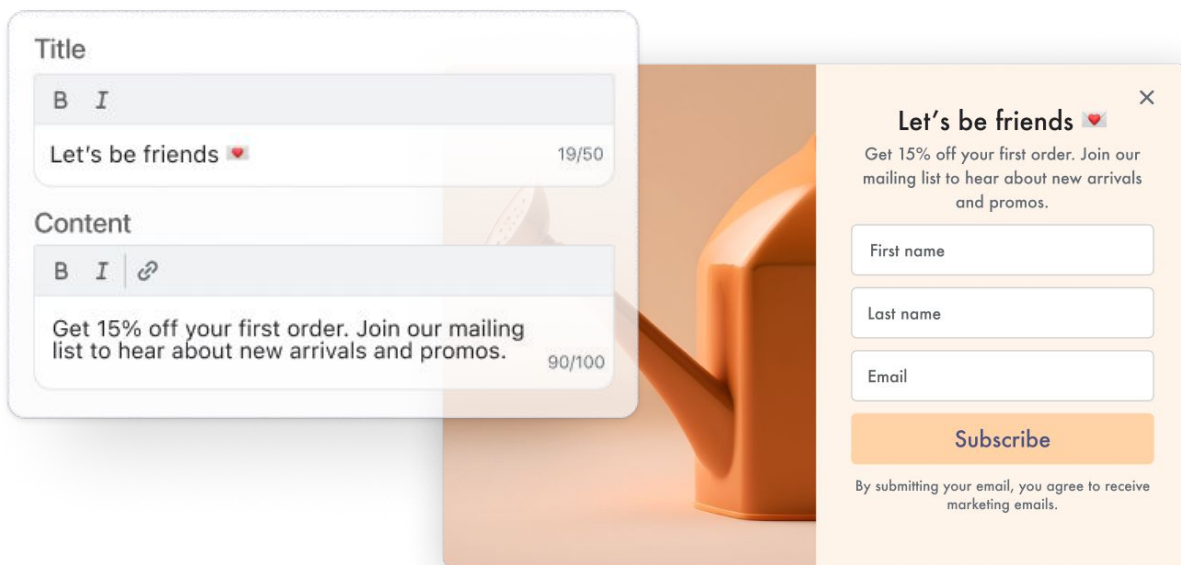
Lead capture tools are anything that helps collect contact information and marketing consent on a store, and Shopify offers two ways to do that for free: Shopify Forms and Shopify Inbox.

PRO TIP: Live chat doesn't always mean live. Show your audience that they can set up instant answers in Inbox to reduce the time they spend on repeat questions, and offer support even when they're offline.

Wait, isn't Inbox a chat tool?

It is, but it can also capture marketing consent. 70% of people who chat in Inbox are making a purchasing decision, and when they start the chat they can opt in to marketing. Why not add those high-intent people to your email list?

Shopify Forms complements Inbox by delivering more straightforward lead capture, with the ability to create overlay and floating forms on a store for free. Add photos to forms, choose when and where they show up, pick from over 200 fonts, and select exactly what info you want to capture—including custom fields.



The image shows a configuration editor for a form overlay on the left and the resulting form overlay on the right, both set against a background of a hand holding a pen.

Configuration Editor (Left):

- Title:** A text input field containing "Let's be friends" with a red heart icon. Character count: 19/50.
- Content:** A text input field containing "Get 15% off your first order. Join our mailing list to hear about new arrivals and promos." Character count: 90/100.

Form Overlay (Right):

- Title:** "Let's be friends" with a red heart icon and a close button (X).
- Text:** "Get 15% off your first order. Join our mailing list to hear about new arrivals and promos."
- Fields:** Three input fields labeled "First name", "Last name", and "Email".
- Button:** An orange button labeled "Subscribe".
- Footer:** "By submitting your email, you agree to receive marketing emails."

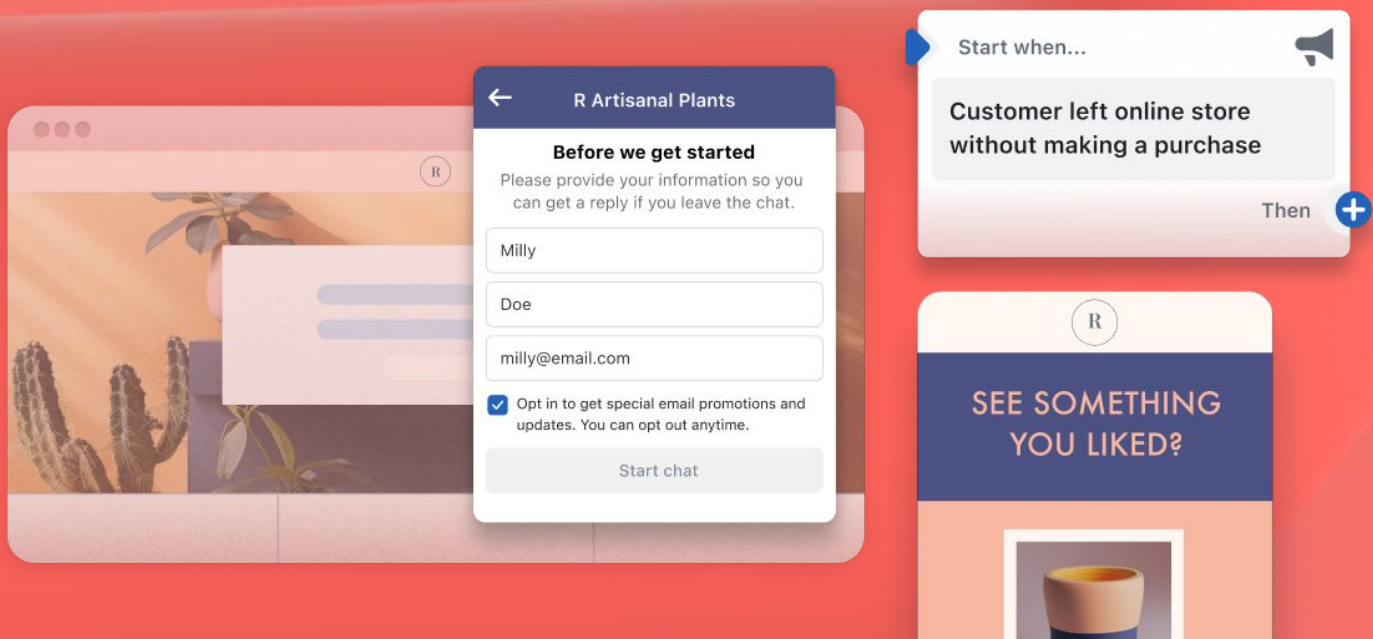
PRO TIP: Showcase best practices for forms in your content. Merchants really like working from examples, like screenshots of forms you have created! You could even ask people to sign up for your list in exchange for your best examples.

Use Case Example

A customer opts into email marketing when they start a chat to ask about some size guidance. They make a purchase that day, and come back to browse products a few weeks later. Because they're on your list, the product browse automation fires, and sends them an email reminding them to come back and buy those things they looked at on your store.

Includes: Inbox, Automations, Shopify Email





Nurture customers with email campaigns and automations

Once someone's on an email list, that's when the fun really starts. Shopify comes with everything your audience needs to build a strong email marketing program right away, including templates for important commerce marketing moments.



Why email?

99% of people check their email every day, and over 50% of people buy from a marketing email at least once a month. Enough said.

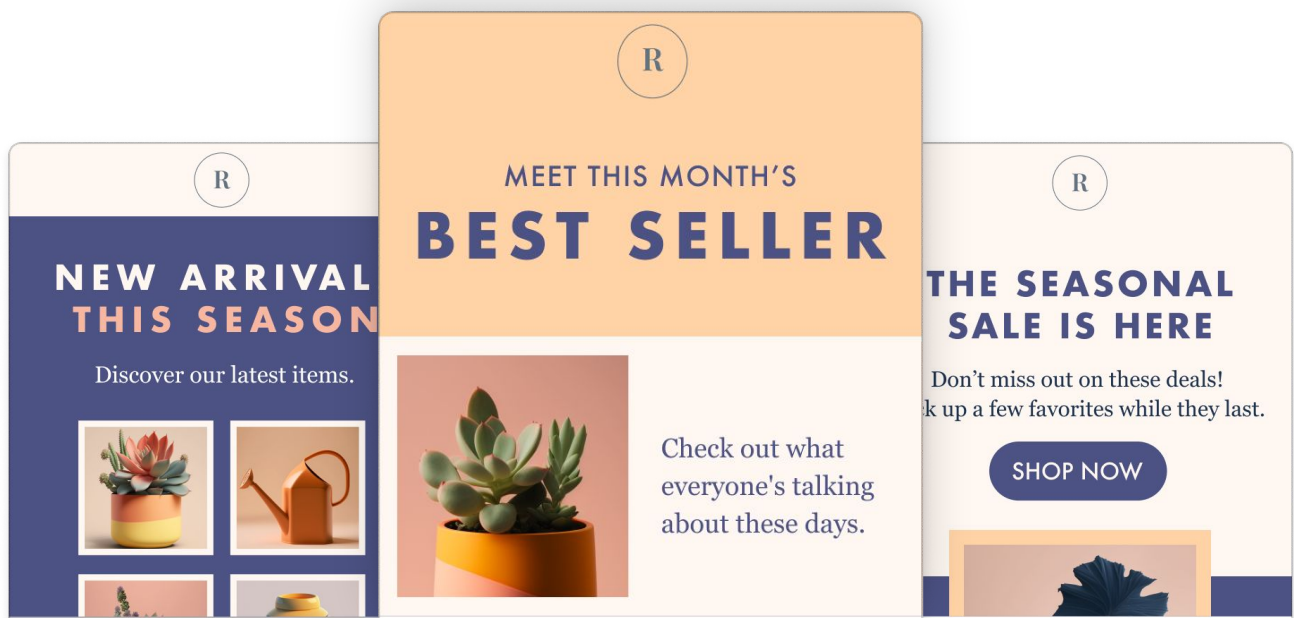
- 99% check emails daily
- 50% purchase from marketing emails monthly

Create and send campaigns

Whether it's launching a new product or announcing a sale, Shopify Email gives your audience all the tools they need to show up looking their best. Start with templates, and use the visual editor to highlight the right products, discounts, and more.

PRO TIP: There's a lot your audience can do within the editor to create emails that look and feel like their brand. Why not add a short video to your content highlighting your own tips and tricks? Some of our favorites for leveling up email designs:

- Hide the built-in header to lead with an image
- Use a gif instead of a static image
- Set images to full-width to stack them one on top of the other
- Add a background color to make the whole email stand out
- Alternate image-and-text sections to add visual interest
- Be consistent with the font and font size you use for headers and body copy





Abandoned
product browse



First-purchase
upsell



Abandoned cart



Welcome new
subscriber

Automate the right message at the right time.

Shopify offers built-in marketing automations, so your audience can set up emails that go out to new subscribers, abandoned carts, and more with just a few clicks. They can customize the emails they're sending using the Shopify Email editor, and even customize the workflows themselves—like changing how long to wait before sending an email, or adding a new wait step and another email to a flow.

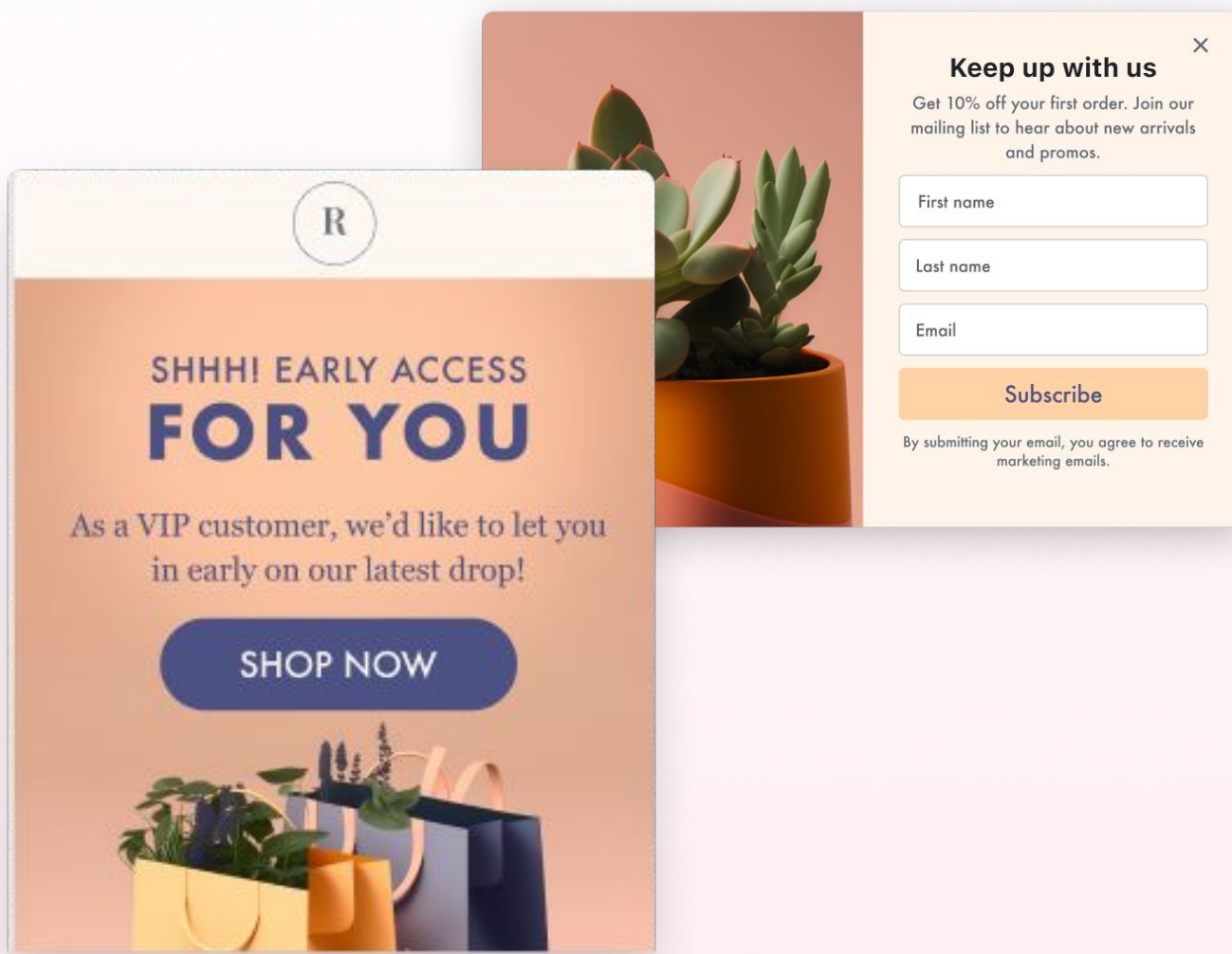
PRO TIP: Your audience wants to learn about how you would do it. Videos (even quick ones for social) of how you would tweak a templated automation to add steps or change wait times are a great way to showcase your expertise.

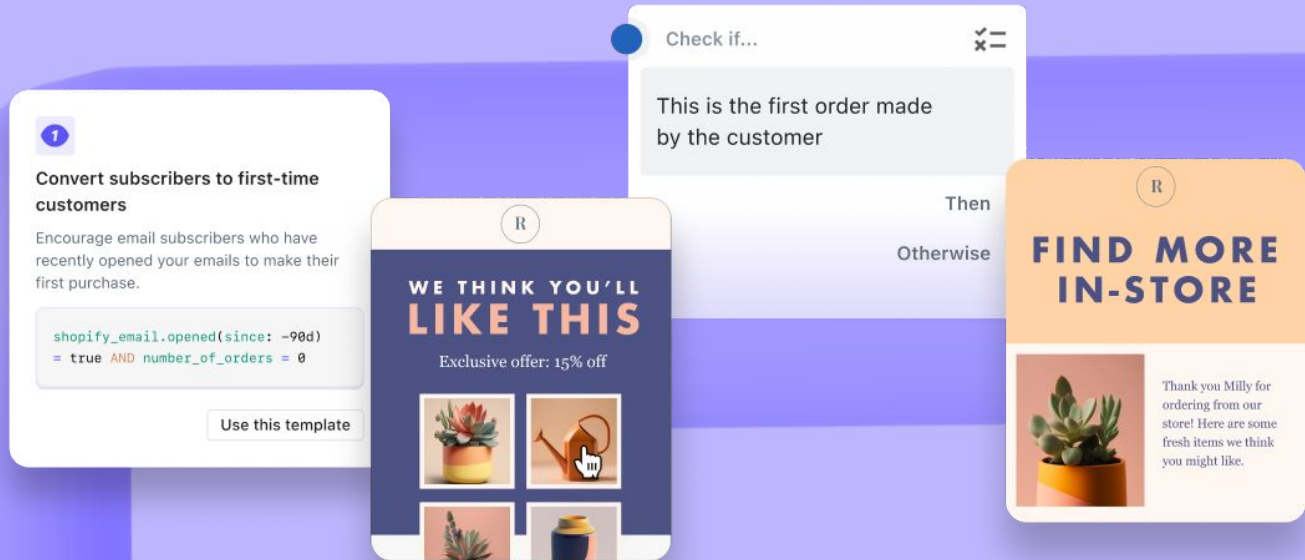
SHOPIFY EMAIL & MARKETING AUTOMATION

Use Case Example

A customer signs up for your list in exchange for the 10% discount code you're promoting. They leave without buying anything, but get your welcome email automation and come back to redeem their discount code. When they do, they spend enough to enter your VIP customer segment, so the next time you send out an email to that group (like early access to your latest sale) they get it, too.

Includes: Shopify Forms, Shopify Email, Automations, Segmentation





Deliver the right message with segmentation

One of the best ways to boost marketing effectiveness is to send the right offers to the right people. That's why Shopify offers built-in segmentation tools, so your audience can target their discounts and emails to the best customers (or soon-to-be customers).

Create segments in the Customers section by using pre-built templates, customizing the templates, or building your own from scratch using dozens of available filters. Your audience can segment based on everything you know about customers in Shopify, like which products they've purchased, which ones they *haven't*, the emails they've opened and clicked, where they live, and more.

Once you've got the right people, you can set up discounts only for people in that segment, and send emails to them with targeted deals.

PRO TIP: Segmentation is used by small and large merchants alike, so it's a great tool to highlight if your audience is looking for advanced content, too. Highlight specific examples of segments to give your audience ideas—there's a lot you can show them beyond the templates.

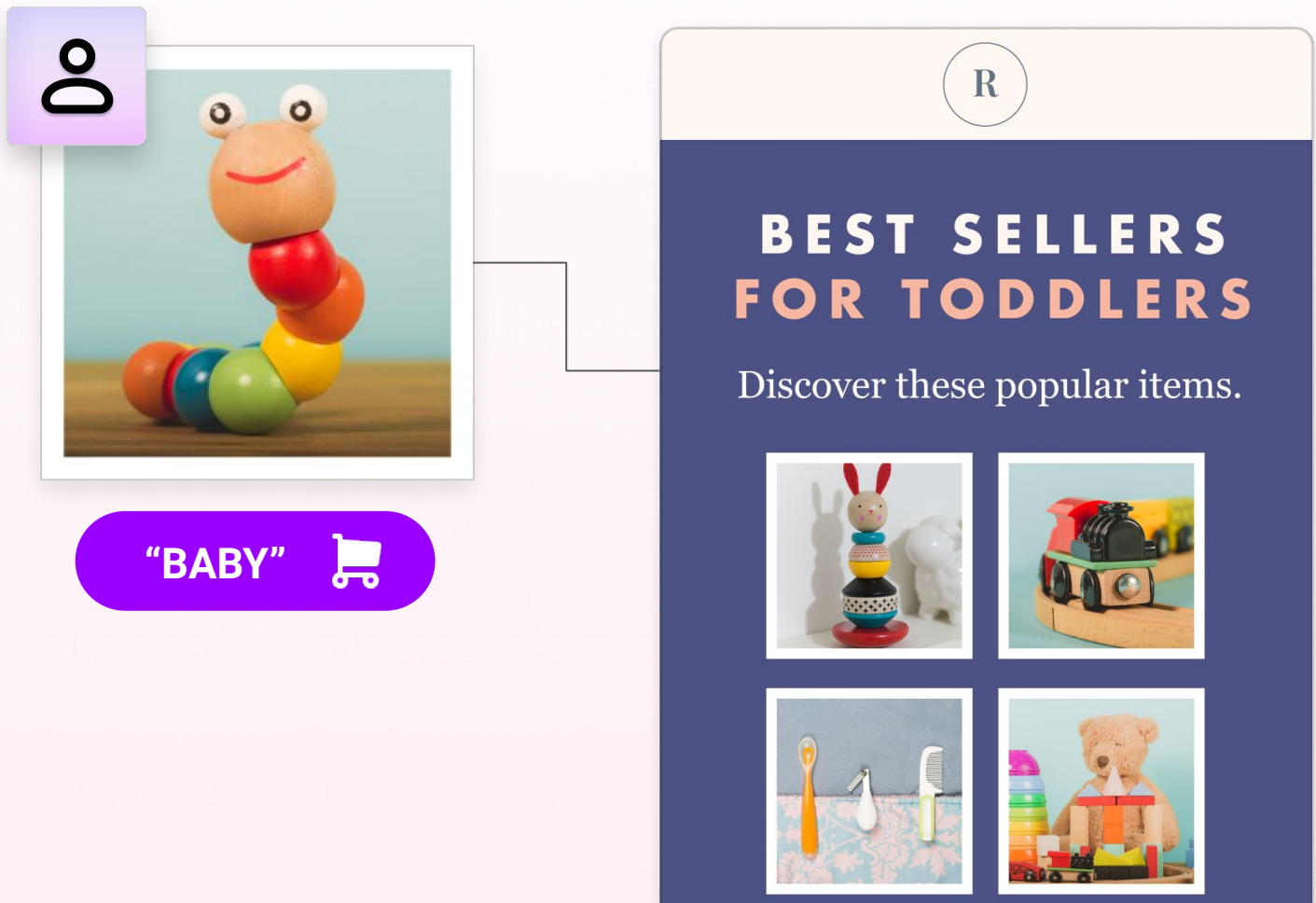
SEGMENTATION

Use Case Example

Let's say you sell toys for babies and toddlers. You can create a segment of everyone who has bought a product tagged "baby" and not yet bought anything tagged "toddler."

Then you can build an email and send it just to them, highlighting some of your most popular toddler toys. After they buy, your post-purchase upsell automation will trigger, too.

Includes: Segmentation, Shopify Email, Automations



Put it all together for maximum impact

Your audience can pick and choose which of these tools makes sense for their business, but the real power is when they're used together. By capturing customer info and using it in the same place, you're actually building a much stronger view of your customer, and opening up new ways to take action.

With all of that data, your audience can more clearly track the impact of their marketing efforts, and quickly find ways to optimize the time they spend on marketing. Shopify comes out of the box with marketing reports to help merchants on all plans make the most of their marketing efforts.

Plus, these tools are all free if you're sending under 10,000 emails a month.

After that, your audience will pay \$1 per 1000 emails they send, and for high-volume users, volume pricing kicks in automatically after 300,000 emails per month. They're not locked into a monthly price, either. If they have a slow month, they only pay for what they use, and they won't need to upgrade during busy months either.

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 Shopify Forms	FREE
 Shopify Inbox	FREE
 Marketing Automations	FREE
 Segmentation	FREE
 Shopify Email	Free for your first 10,000 emails every month, \$1/1000 emails after that—and volume pricing kicks in after 300,000 emails per month.

Want more details?

Here's where you can find out more about each product to help create content that converts more of your audience into Shopify merchants.



Shopify Forms

[Help Docs](#)

[Landing Page](#)

[App Store](#)



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