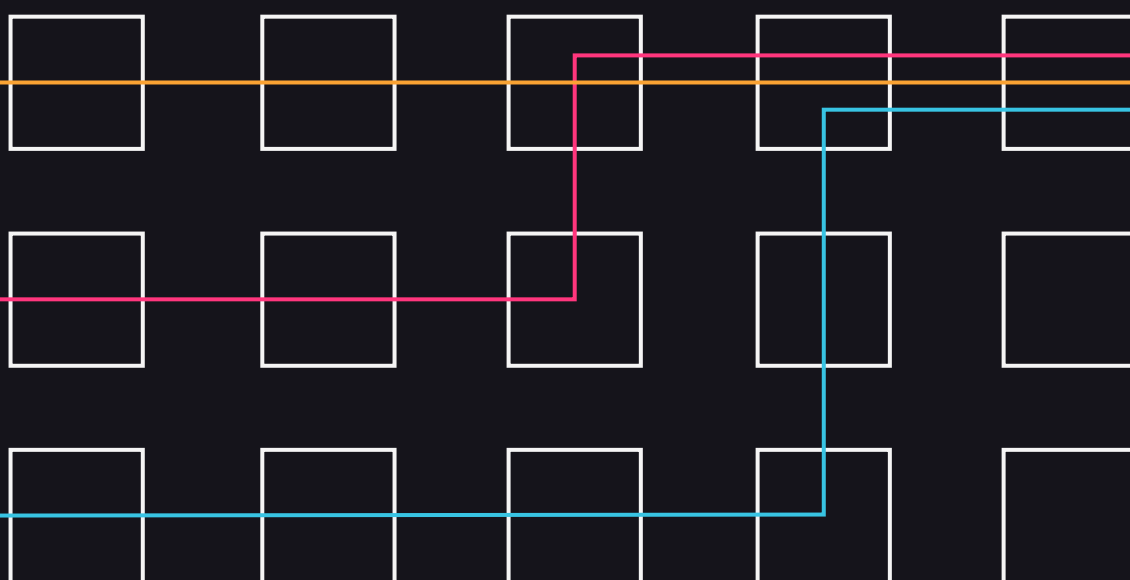




# Ecommerce Automation 101

The basics of putting your ecommerce business on autopilot.



Every retailer executes hundreds, if not thousands, of small tasks that take between two and five minutes every day. Individually, they never appear to be a significant time waster. But together, they devour productivity and stunt growth.

## Ecommerce automation is about giving your people and yourself the most important thing you can: time.

More than that, it unleashes your teams to invest in high-value work in our current climate: retraining staff on new fulfillment processes, crisis communications, working out new deals with suppliers, dealing with HR challenges, experimentation, sales and marketing, and product iteration.

Thousands of online retailers have put ecommerce automation to work with Shopify Plus—in total, that's 22 million hours in time saved (or more than 2,500 years).

**We'll uncover how ecommerce automation can save you time and costs to focus on the work that counts.**



# 22M

hours in time saved

What is ecommerce automation?

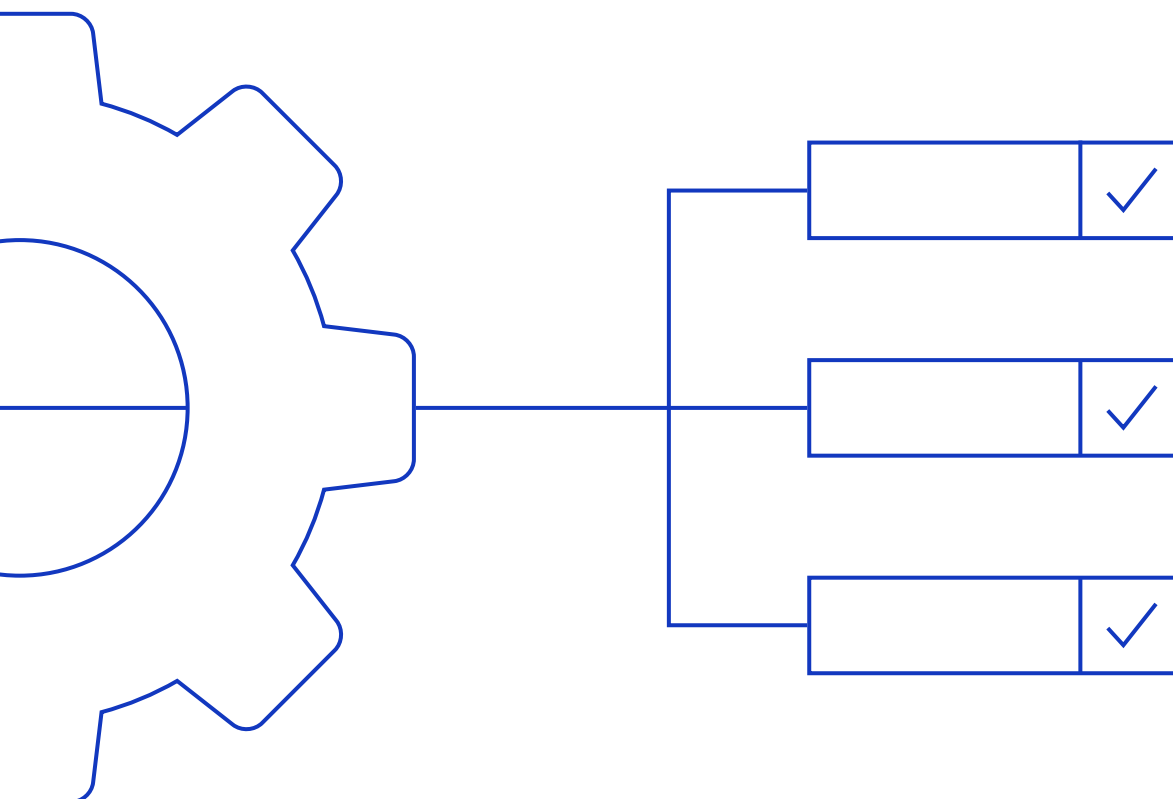
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# What is ecommerce automation?

Ecommerce automation is software built to convert manual tasks to automations that intelligently execute exactly when needed. It's how businesses can do more with less.

The problem is simple: As a business scales, the demands, complexity, and repetition add up. Systems that used to work become increasingly inefficient and break down. In response, companies turn to time-consuming workarounds—time that could be spent on what's important is sacrificed for time spent on what's urgent, even when that's just pushing buttons.

Or companies turn to new hires. Unfortunately, people don't scale. But that doesn't undercut the value of people—if anything, it reinforces it. People, especially their time and energy, are your most powerful resource.



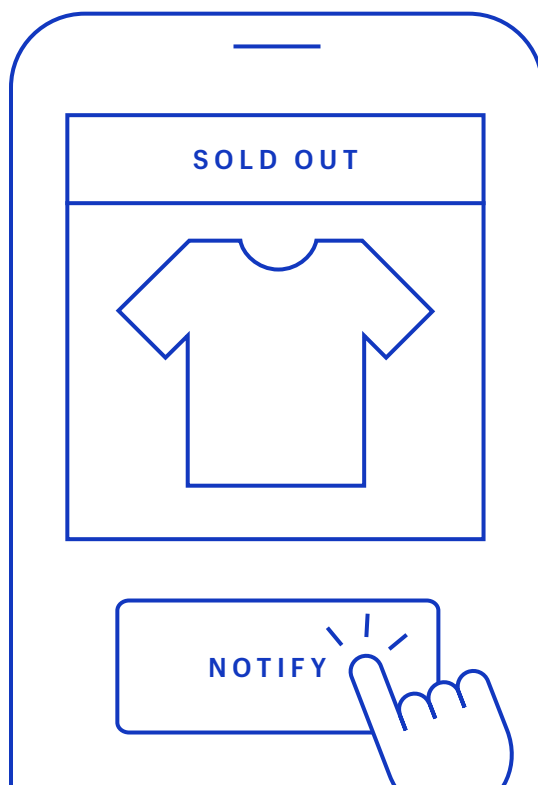
# Examples of ecommerce automations

Ecommerce automations can take a host of different forms like tagging customers for segmentation and marketing, standardizing visual merchandising, streamlining tracking and reporting, and halting high-risk orders. With each workflow, the goal is the same: to simplify tasks.

Below are some examples of reduced manual tasks:

- **Fulfillment:** When an item is ready to be [picked up](#) in store, trigger an email or SMS or Facebook message to the customer
- **Inventory levels:** Unpublish out-of-stock products and send a Slack message or email to your marketing team so they can pause advertising

[Good American](#) used one of our ecommerce automation tools, Shopify Flow, to automatically tag products so they display as "sold out" when they were out of stock, or to display "low stock" when its quantities dipped below a certain threshold.





## GOOD AMERICAN

**It's an extra incentive or nudge to buy when customers see we're running low on a product. If we're out of stock, it also gives shoppers an opportunity to sign up to be notified when the product is back in stock, which results in future sales we otherwise might miss.**

**Mehmet Dokumcu**

Executive Vice President of Digital & Commerce, Good American

**Best sellers:** Re-add out-of-stock products to the online store when they're back in stock.

**Customer loyalty:** Automatically tag high-value customers for segmentation and notify customer service to send a personalized thank you message, or apply discounts or specialized shipping rules to customers with email addresses or tags like "Loyalty Member".

**High-risk orders:** Instantly flag and notify internal security teams of high-risk orders, like if a bot quickly buys out all of your stock.

**Manage donations:** Keep track of dollars donated via Slack and a spreadsheet.

**Order tagging:** Tag restricted shipping zones and hold payment from customers trying to ship to those locations. Alert staff to offer customers store credit to spend on their next purchase or a refund.

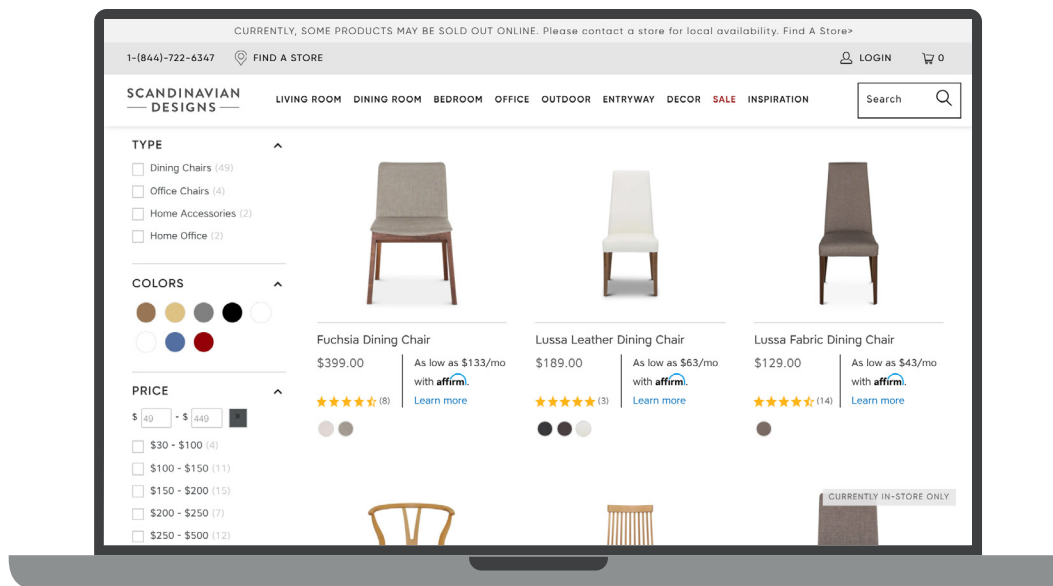
**Customer preferences:** Show and hide payment options relative to customer criteria like order history, location, and device.

**Channel preferences:** Identify, tag, and segment customers who buy from specific sales channels, such as Amazon, Facebook, Pinterest, and more.

**Scheduled sales:** Price changes and promotions for predetermined time periods.

**Discounts:** Adjust prices at checkout based on product combinations, quantity, or customer location.

**Scheduled product releases:** Preload new products and publish them to your store, social media, apps, and sales channels simultaneously. Rollout and rollback entire theme changes for seasonal promotions or product drops.



Examples of ecommerce automations

Home goods retailer [Scandis](#) created seven active workflows across three different Shopify storefronts, including one to track commissions from their in-store associates at its 32 brick-and-mortar locations.

It's also created Flows to:

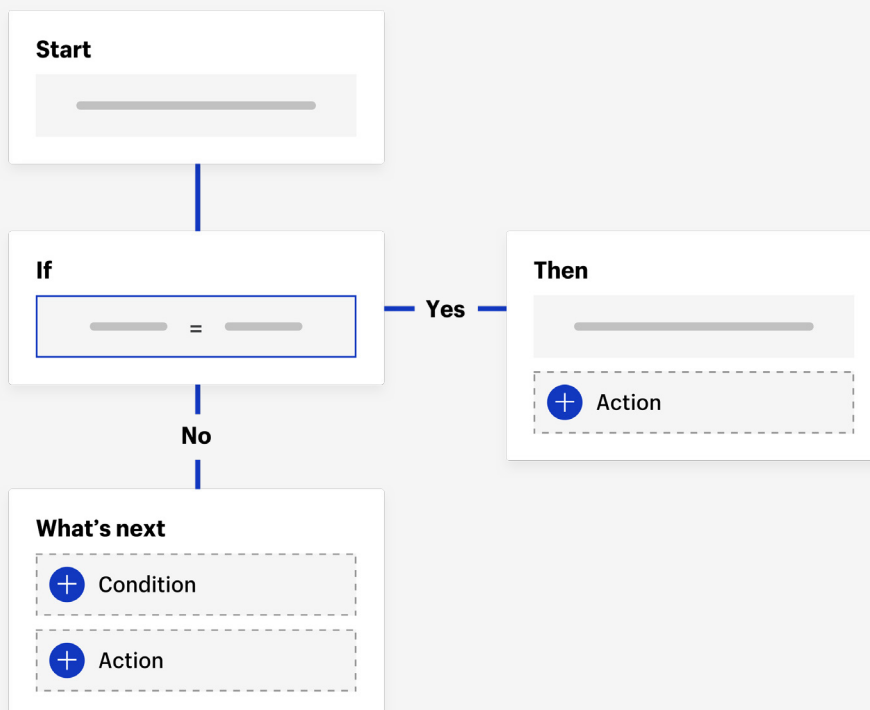
- Automate employee discounts
- Manage their inventory and reordering processes
- Optimize their refund reports saving them hundreds of hours every year
- Unpublish and publish products due to availability, warehouse movements, and returns

**The possibilities are endless.**

# How can you automate your ecommerce operation?

Creating your own in-house systems or engineering your own connections between your platform and tools requires a lot of work. Shopify Flow is an out-of-the-box solution you can use to create automated workflows across your online store and apps.

Start automating in seconds with easy-to-use templates. Shopify Flow follows a trigger, condition, and action logic created through an easy-to-use visual builder.



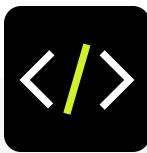
Workflows can be built and deployed in minutes, or you can use pre-made [workflow templates](#), both without ever writing a single line of code.

Shopify Flow can also be combined with many other tools, shown below:

## Customize your checkout with Shopify Scripts


Customize your checkout experience with [Shopify Scripts](#) which automatically adds personalized discounts, like gift with purchase, buy one get one, or purchase thresholds to your checkout. Or showcase relevant payment options, specialized shipping options, and adjust prices in specific areas to create a customized checkout experience for each customer.

Shopify Scripts comes with [ready-to-use script templates](#) for the most popular use cases (e.g. tiered discount by spend, tiered discount by quantity, and more).



**Zero risk: 90 day money-back guarantee**

2



**Sunglasses**

\$120

\$100

**Multiple Pair Discount**

**-\$20**

Subtotal


\$100

Shipping


**FREE**

Total


USD **\$100**



Secure checkout



10 million items sold



Free returns





## Schedule sales events with Launchpad

Take the stress out of sales with [Launchpad](#) to schedule, preload, and monitor events like major sales campaigns, product releases, and seasonal celebrations.

**Title**

Product drop

**Start date**

Tue, Jul 18 9 : 00 AM

**Product release**

☒

☒

How can you automate your ecommerce operation?

Beyond our in-house automation tools, Shopify Flow plays nicely with a suite of tools you likely already use. Our connectors integrate and automate the apps you use, without a single line of code.

## Popular apps that connect with Shopify Flow to increase sales



[Back In Stock](#) notifies your customers when a product is available



[Growwave](#) notifies your customer when an item on their wishlist is on sale



[Slack](#) can notify your marketing team channel to turn off ads when product inventory is low



[LoyaltyLion](#) keeps track of your customers and their engagement (purchases, adding to wishlist, submitting a review, etc.)



[Klaviyo](#) creates social and email marketing campaigns based on your customer behavior

Want to see if an app you use every day can work with Shopify Flow?  
[Check out this list for all the apps Flow can currently connect to.](#)

How can you automate your ecommerce operation?

# Whose time are you saving with ecommerce automation?

Ecommerce automation works best when adopted by interconnected roles and departments within an organization. Just remember, this is far from a comprehensive picture. The following examples represent a small sample of the automations you can create with Flow.



## Operations managers

Ecommerce operations can use automation for a host of inventory, shipping, and product-related workflows. To standardize visual merchandising and make discoverability easy, products can be automatically tagged and added to collections based on their title, SKU, or type.

When stock gets low, Flow can send you alerts or be used to email a supplier to reorder. In a similar vein, out-of-stock or discontinued items can automatically be taken down and then republished once the inventory arrives.



## Customer service reps

Flow lets you tag customers based on conditions like order value, and acquisition channel. Beyond simply creating segments for marketing and retention, customer service can be instantly notified over Slack or email to reach out with a personalized thank you message or loyalty program invitation.

Likewise, when an item is returned, customer service can be prompted to follow up on whatever communication channel the customer last used—email, social, Messenger, or phone.



## Fraud prevention team

To safeguard order fulfillment, Flow can be used to augment Shopify Plus' [existing risk analysis](#). Already, when high-risk orders are identified—through an IP address check, address verification system (AVS), or Shopify's own database—they're automatically halted or flagged for review.

In addition, ecommerce automation can be configured to notify your own security or fraud-prevention specialists for hands-on review, potentially saving you thousands of dollars in chargebacks and lost revenue.



## Marketing and advertising teams

When new products are added to a storefront, marketing departments can be notified, forwarded product details, and prompted to start advertising. Marketing teams can also be notified when inventory is running low on specific products to pause promotion and optimize ad spend.

Scheduling sale changes in advance allow marketing teams to better plan promotions, and reduce errors and downtime for the rest of the team. Best of all, customers may be tagged at checkout based on a host of criteria for personalized marketing.



## Design teams

For retailers who specialize in customized products, order specifications can be sent directly to the design team's workflow, eliminating the need for designers to run reports or perform unnecessary administrative work.

Designers themselves can use Flow to leverage a host of marketing tactics—"back-in-stock" banners, overlays, and action-oriented visual cues like "buy now—limited quantity remaining"—all of which are published and unpublished automatically based on tags referenced by the theme.

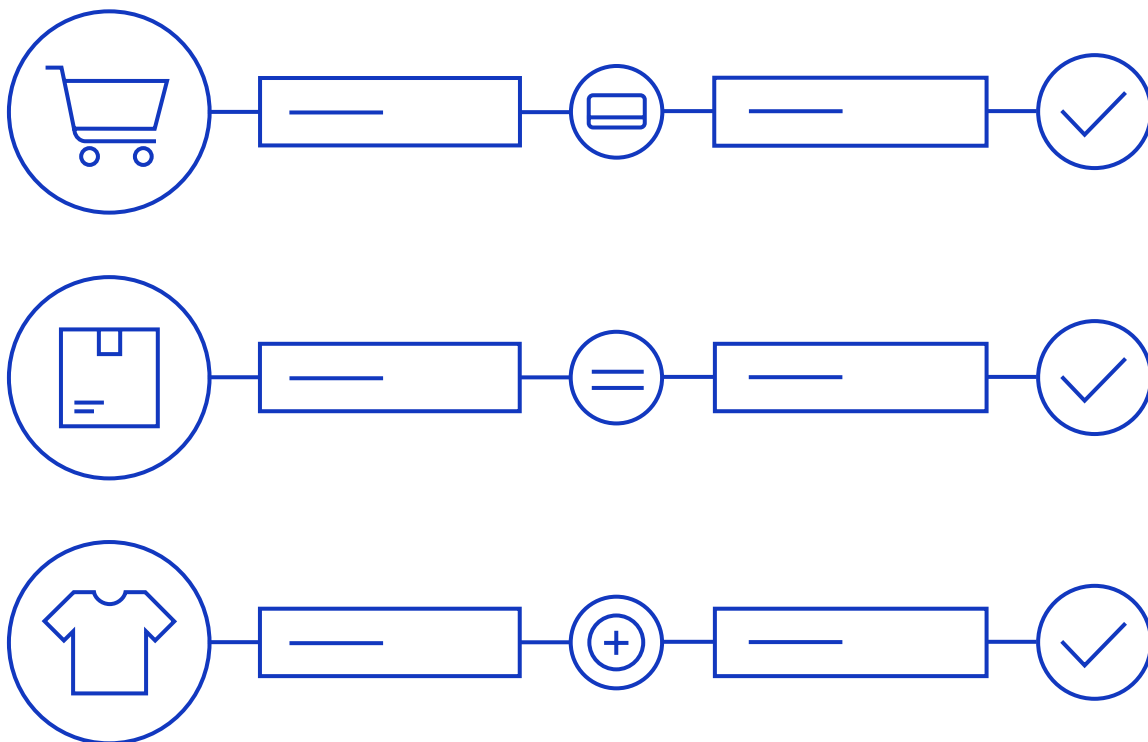


## Web development teams

Next to operations managers and security, developers may actually stand to gain the most from automation.

Theme changes, merchandising opportunities, email captures when an item goes out of stock, free-gifts on selected purchases, and displaying the best payment or shipping options can all be customized through ecommerce automation.

Once created, these rules remove the need to code repetitive updates that bog down a developer's resources and time.



Whose time are you saving with ecommerce automation?

# Save time with Shopify Flow

Want to start streamlining costs and getting value for your platform investment? Shopify Flow can help you do more with what you have.

Connect with an automation expert today.

Contact us

Already on Shopify Plus? [Install Flow now.](#)