

ISSUE #02 · 29 SEPTEMBER 2026 · THIS WEEK IN ECOMMERCE AI

Meta's agent can now buy from your store

Plus: why your Shopify conversion rate moved without a single extra order.

Four weeks ago we flagged that Shopify had quietly made every storefront something an AI agent could shop; this week a mass-market agent started shopping, and Amazon shut the door on it. The through-line is defaults: platforms switched things on for you, on product sharing, checkout, session counting and AI Max, and this week's job is finding them.

Update on Issue #01: we said AI Max's post-migration defaults were unconfirmed. Google had in fact published them on 12 August, and we missed it. They're below.

THE SIGNAL

Meta's shopping agent can now check out on your Shopify store

On 24 September, [Meta confirmed](#) that Muse, its consumer AI agent, has "access to the entire Shopify catalogue" and takes Shop Pay. You may already be enrolled: since 8 September, [Shopify has shared your products with Meta by default](#), and [direct checkout is on by default](#) for eligible stores that sell to the US, Canada or Mexico. Amazon went the other way: [GeekWire reported on 21 September](#) that it had blocked Muse from its site.

Two things most coverage will miss. First, Shopify says you stay merchant of record, so returns and chargebacks on agent orders are yours, from customers you never saw browse. Second, Goldman Sachs analysts, [as reported by Axios](#), named businesses built on recurring bills and add-ons as exposed. If you run subscribe-and-save, that means you.

This week: open Sales channels › Agentic › Meta and make the on/off call yourself instead of leaving it to the default.

WORTH KNOWING

Your Shopify conversion rate moved on 21 September. Your orders didn't.

Shopify [changed how sessions are counted](#), focusing the default view on human visitors and classifying bot traffic more consistently. Nine metrics are affected, including conversion rate, add-to-cart rate and bounce rate; orders and sales are not. Shopify's own advice is to treat the date as a new baseline. Annotate it in every dashboard before anyone credits, or blames, a CRO test or agency for the change, and don't mix pre- and post-change weeks in Q4 comparisons.

The AI Max migration window closes on 30 September. Check what it switched on.

Google's auto-upgrade of campaign-level broad match and standalone automatically created assets campaigns [rolls out through September](#). After migration, search term matching is on by default for both, and text customisation is on for former standalone-ACA campaigns. Open each migrated campaign and confirm those settings and your brand exclusions are what you would have chosen. Google's [unified search-term-to-landing-page report](#) is promised for "later this year".

Google's 50-conversion figure is a guide, not a gate.

Google's help centre says a bid strategy can take ["up to around 50 conversion events or 3 conversion cycles"](#) to calibrate after a change, and sometimes less. The trap is a campaign doing ten conversions a week that gets adjusted every week, because it may never finish calibrating. If you reset targets after Issue #01, leave them alone through that window, and consolidate campaigns too thin to reach it.

Customer Match now takes IP addresses, but not for your European customers.

Google Ads [Customer Match uploads now accept IP addresses and interaction timestamps](#), sent unhashed. Google's own caveat: "IP matching isn't supported for end users located in the EEA, UK, or Switzerland." For an EU brand, that means it only helps with US and other non-European lists. Split lists by region before uploading, and put raw-IP sharing to your data protection lead first. This is not legal advice.

ONE THING TO DO THIS WEEK

If you sell into North America, open Sales channels › Agentic › Meta in your Shopify admin. Decide on purpose whether Meta's agent should find your products, check out on them, both or neither. Then check that your returns policy is current, because the returns on those orders are yours.

That's the week. Reply and tell me whether Meta-attributed orders have turned up in your admin yet. I read every reply, and it makes the next issue sharper.

P.S. If this was useful to a colleague, they can get it free every week at ecomifyai.ie.

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SOURCES

Every claim in this issue links to one of these. Click any URL to open it.

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