



Shopify Store Setup

USER GUIDE

Congratulations! You're the proud owner of a Shopify store. We know starting a business isn't easy but you're not at it alone.

We've partnered up with Shopify to help you and your business grow. We put together this introductory guide to teach you the ins and outs of your online store.

Let's do this!

Logging into your Shopify Store

When you create a store using Shopify, we create a free domain that looks like this: yourstore.myshopify.com. To login replace yourstore with your stores name and type it into your web browser like this:

yourstore.myshopify.com/admin

Shopify Dashboard

You'll find the dashboard on the main page of your store's admin; it's the first thing you'll normally see when you log in. Shopify tracks your online store's traffic, revenue, and growth trends, and lets you monitor them all through your dashboard.

Settings

In the left hand sidebar you will see the menu to all your settings in Shopify. Start by clicking on menu link the lower left called Settings.

General

Enter your business information. Store title, business address, unit and currency settings.

Payment Providers

An ecommerce payment gateway is a service that allows you to accept credit card payments securely online through your Shopify store. Shopify connects to over 70 different payment gateways across the world.

<https://help.shopify.com/manual/payments/third-party-providers>

Checkout Settings

Set what customer information is collected during checkout, how the order is processed, and your return / terms and conditions.

Shipping

Your Shopify Admin helps you manage the delivery of your goods to your customers – a very important aspect of your business! You configure all your shipping settings, including features like free delivery or customer pickup, from your Shipping page.

<https://help.shopify.com/manual/shipping>

Taxes

When your shop is first created, Shopify sets up some default tax rates for your own country (and its provinces, states, or territories, if applicable). They do their best to keep the default tax rates up to date, but you should double-check to make sure that they are current and correct.

<https://help.shopify.com/manual/taxes>

Gift Cards

Gift cards provide a flexible way for your customers to purchase a gift for someone from your store, making it easy for them to share their love for your brand while also maintaining full freedom of choice. With Shopify, customers purchase gift cards the same way they purchase any other product.

<https://help.shopify.com/manual/products/gift-card-products>

Notifications

Choose what notifications are sent to you and your customers.

<https://help.shopify.com/manual/sell-online/notifications/edit-template>

Files

In this section you can upload and manage all your images in one area.

<https://help.shopify.com/manual/sell-online/online-store/file-uploads>

Sales Channels

You can use Shopify to sell your products using one or more online sales channels. Each place where you are selling is like a channel that flows into your business, helping customers from a variety of audiences find your products.

<https://help.shopify.com/manual/sell-online/online-sales-channels>

Social Media

If you're not using social media on your website, you're missing a huge opportunity to maximize the potential of your business. When they're online, people spend more time using social media than anything else. They share ideas, information and opinions with everyone in their network, and word travels fast. Grab some of that momentum for your own store, and get people talking about you. Integrate social media in your store:

<https://help.shopify.com/themes/customization/social-media>

Account

Manage your user account settings and add new staff accounts to help you run your store.

Billing

Manage your billing information and update or upgrade your plan settings.

Orders

Your order processing settings will determine how your credit card payments are captured, how your orders are fulfilled, and whether or not you can use a fulfillment service.

<https://help.shopify.com/manual/orders>

Abandoned Checkouts

Not everyone who adds a product to their cart completes the checkout. When a potential customer provides their contact information but doesn't complete the order, their information is stored in abandoned checkout.

<https://help.shopify.com/manual/orders/abandoned-checkouts>

Products

Products are the meat and potatoes of your store. Without products to sell, you can't make any money! Products are often physical goods, but they can also be a digital download (such as a movie, music or ebook file), or a service (an extended warranty, equipment rental, customization of another product or work for hire). Shopify keeps track of all of your products and their inventory on your products page.

<https://help.shopify.com/manual/products/add-update-products>

Product Variants

A product variant is a variation of a product in your store, with differences based on elements such as size, color, material, etc. Let's say you have a store that sells t-shirts. You create your original product called "t-shirt," and product variants allow you to advertise the different colors and sizes.

<https://help.shopify.com/manual/products/variants>

Transfers

You can use transfers to record, keep track of, and receive incoming purchase orders and inventory from suppliers.

<https://help.shopify.com/manual/products/inventory/transfers>

Inventory

Inventory tracking can help you avoid selling products that have run out of stock, or let you know when you need to order more of your product.

<https://help.shopify.com/manual/products/inventory>

Collections

A collection is any group of products (chosen by you) with some feature in common that customers might look for when visiting your store.

<https://help.shopify.com/manual/products/collections>

Customers

Shopify keeps track of all your store's customers. In the customers area of your admin, you can:

- Search and filter your customers
- Save frequently done searches
- Edit customer details
- Export/Import a CSV file of your customers
- Manually add a customer to your store

<https://help.shopify.com/manual/customers>

Analytics

You can use Shopify's analytics and reports to learn about your sales and customers in great detail. The types of analytics and reports that you can view depend on your Shopify Plan: <https://www.shopify.com/pricing>

Reports

The reports page in your Shopify admin lets you spend less time crunching numbers and more time learning about how to grow your business. With Reports, you can:

- See reports for products, orders, and payments
- View the data in both a table and chart form
- See reports for a particular date range
- See the amount of taxes collected

Stores on Shopify's Unlimited or Plus plan also get advanced reporting

features, such as the ability to export any report; customize and create new reports; and filter down on anything to make a report more specific or detailed.

<https://help.shopify.com/manual/reports-and-analytics/shopify-reports>

Discount Codes

Offering discounts, coupons and sales can be a vital marketing strategy for your Shopify store. Discount codes can be generated for a dollar value discount (\$10 off), or for a percentage discount (10% off). You can also specify the dates for which the code is valid, the number of times a code can be used, a minimum order amount before the code can be used, and to which products or collections the discount can be applied.

<https://help.shopify.com/manual/promoting-marketing/discount-codes>

Apps

Shopify has a large selection of apps that extend the functionality of your store. There are both free and paid apps in the marketplace.

<https://apps.shopify.com/>

Online Store

The online store contains your theme, blog, pages, navigation, and custom domain name.

Themes

Shopify offers many themes that you can install to your in your online store. The Theme Store includes free themes made by Shopify, and paid themes made by third-party designers.

<https://help.shopify.com/manual/using-themes/choose-themes>

Pages

Pages are meant to be used for static content. They're great for adding "About us" sections, Terms of Service policies, shipping and refund information.

<https://help.shopify.com/manual/sell-online/online-store/pages>

Blog

Your Shopify store comes with a built-in blogging engine. That means your shop can have its own blog! Blogs are great for content that you'll be updating regularly. Make posts on your store's blog if you're looking to create discussion and build a community around your products and your brand.

<https://help.shopify.com/manual/sell-online/online-store/blogs>

Navigation

In order to give your customers access to all the pages, collections and blogs within your online store, you must link to each page in a central place. Your store's most prominently featured navigation is the main menu. This is often referred to as your store's "main navigation," as this is how visitors to your store will be able to navigate to all the areas of your website.

<https://help.shopify.com/manual/sell-online/online-store/menus-and-links>

Launching your Store

Custom Domain Name

We strongly recommend that you get a professional custom domain name like yourstore.com instead of yourstore.myshopify.com

<https://help.shopify.com/manual/domains/connecting-existing-domains/setting-up-your-domain>

Preferences

Google Analytics

Google Analytics lets you track visitors to your store, and generates reports that will help you with your marketing.

<https://help.shopify.com/manual/reports-and-analytics/google-analytics>

Facebook Pixel

Facebook Pixels allow you to connect your Shopify store to your Facebook Ads account.

<https://help.shopify.com/manual/promoting-marketing/facebook-pixel/facebook-pixel-for-shopify>

Storefront Password

The last step is to remove your storefront password. This makes your store public to everyone on the internet.

More Options

Shopify Mobile

Manage your business on the go. You can view customer information and review orders and products – all from your smartphone. Fulfilling online orders, capturing online payment, and tracking inventory is easy with Shopify Mobile.

<https://www.shopify.com/mobile>

Shopify POS

iPad checkout system that enables you to use Shopify to process transactions in your retail store or at mobile locations. All your products, customers, and orders are synchronized and recorded in your store's Admin, which you can access from any browser.

<https://www.shopify.com/pos>

Advanced Plans

What's next? Now that you're familiar with how your online store works, check out these advanced features from Shopify.

Shopify Plus

A white-glove ecommerce solution for emerging brands and high-volume businesses. It offers you an additional layer of expertise on top of Shopify's service, stability and uptime you already rely on. Plus provides the enhanced features and support that your expanding business needs.

<https://www.shopify.com/plus>

Resources

Shopify Docs

Help articles for all the options in Shopify

https://help.shopify.com/?utm_source=Docs

Shopify Blog

Daily posts with ecommerce expertise

<https://help.shopify.com/manual/sell-online/online-store/blogs>

Ecommerce University

Free tools and resources to accelerate your skills and success.

<https://ecommerce.shopify.com/>

Social Media

Follow us for updates, inspiration and tips and talk with our other customers

<https://www.facebook.com/groups/shopifystoressetup/>

Chase the vision, not the money, the money will end up following you.