



Bringing your offline business online

Everything you need to know about getting started with Shopify

We're with you.

Business owners like you are the heart of Shopify and we know uncertain times can bring you extra challenges.

We want to do everything in our power to support you. Read on to learn about the resources we've developed to help you navigate your business during this challenging time and get answers to your questions about taking your business from offline to online.

Together, we'll make it through.

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What is this?

This guide will help get your offline business online. It goes over everything you need to know about Shopify, highlights the tools available, and provides step-by-step guides on creating and managing an online store.

By the end of this guide, you will complete making your own online store and be ready for sales!

Sign up For Shopify

The screenshot shows the Shopify homepage with a dark green header. The main content area is light green and features the headline "Build your business" and the subtext "You've got the will. We've got the way." Below this is a form to "Enter your email address" and a "Start free trial" button. A video player shows a person working in a shop. Below the main section are four smaller images: a person in a warehouse, hands using a tablet, a smartphone displaying a shop, and a blue hat on a plate. The lower section is white and contains the text "With you from first sale to full scale" and "One platform with all the ecommerce and point of sale features you need to start, run, and grow your business." Below this is a graphic of a storefront with a penguin and a sign, and a row of icons representing different business tools. To the right of this graphic is the text "Start — your business journey" and "Find a business name, buy a domain, and create a brand with our free tools." Below that is a link "Explore tools to start your business ->".

Learn more about the actions we're taking to address the impact of COVID-19

shopify Start Sell Market Manage Pricing Learn Log in Start free trial

Build your business

You've got the will. We've got the way.

Enter your email address

Start free trial

Due to the impact of COVID-19, Shopify is offering an extended 90-day free trial. By entering your email, you agree to receive marketing emails from Shopify.

With you from first sale to full scale

One platform with all the ecommerce and point of sale features you need to start, run, and grow your business.

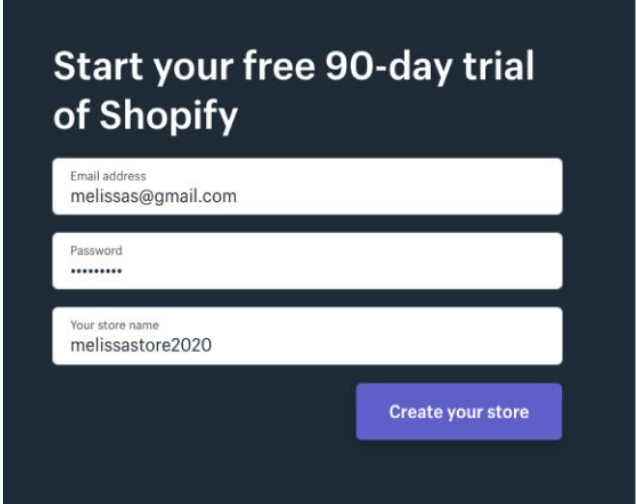
Start — your business journey

Find a business name, buy a domain, and create a brand with our free tools.

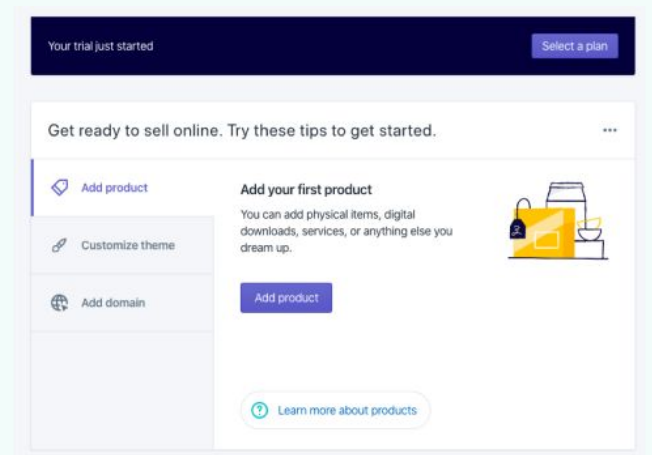
Explore tools to start your business ->

[Shopify.com](https://www.shopify.com)

1. Head over to Shopify and select “start free trial!”
2. Next, enter your email and create a password. Then choose a store name. Your store name will become your domain (or the URL that your customers will go to when they want to purchase your products). Don’t worry this can be changed into a domain name later on.
3. You now have a couple forms to fill out. Once you answer all the questions click *next*.
4. Welcome to Shopify! It’s now time to build your store by picking a theme.



The screenshot shows the 'Start your free 90-day trial of Shopify' form. It has a dark background with white text and input fields. The form includes three input fields: 'Email address' with the value 'melissas@gmail.com', 'Password' with masked characters '*****', and 'Your store name' with the value 'melissastore2020'. A blue button labeled 'Create your store' is positioned at the bottom right of the form.



Watch: [How to sign up video](#)

Read: [Introduction to Shopify help document](#)

Pick a Theme

Now that you are all signed up, it is time to select a theme! This will determine what your store looks like when customers visit. There are many to choose from. Shopify offers 8 free home-made themes you can use to outfit your store or you can purchase one from the Shopify theme store where there are hundreds more to choose from! Let's go.

Shopify admin > online store > themes

Themes

[View your store](#)

Live theme

This is the theme customers see when they visit your store.

Debut

Added: Just now

[Actions](#) [Customize](#)

Theme library

Manage your store's themes. Add and publish themes to change your online store's appearance.

[Upload theme](#)

Free themes

Explore Shopify's free themes, all designed to offer the best home page customization.

[Explore free themes](#)

Shopify Theme Store

Browse free and selected paid themes using search and filter tools.

[Visit Theme Store](#)

‘**Live View**’ is where you customize and take action on the theme that is currently published on the website.

By default, stores begin by wearing the **Debut** theme made by Shopify. This is a great theme as it contains capabilities for sharing product media, such as videos and 3D models, and has a built in *currency selector* if you are selling in multiple currencies.

- **To edit the theme**, click *Customize*
- This will bring you to the **Theme Editor**. In the editor, you will be able to make all customizations to the theme and change how the website looks to your customers.

If Debut is not the right theme for you, *explore free and paid themes* Shopify has to offer by [visiting the Shopify theme store](#).

Now that you can see the other themes, click on a theme you want to explore. If you like what you see, click **Add to theme library**. This will add the theme to your *theme library*.

Read: [Free themes from Shopify](#)

Watch: [What is a theme?](#)

Watch: [How to add a theme from Shopify theme store in under 2 minutes](#)

Inspiration [50 Exceptional Stores Built on Shopify](#)

Read: [Customizing themes](#)

Add a Product

Your products are the heart of your business, so today we'll be focusing on how to **add new products to Shopify in 5 easy steps**. You'll quickly have your best sellers ready to go for your store launch!

Step 1: From your Shopify admin, go to **Products > All products**.

Step 2: From the **Products** page, click **Add product**.

Step 3: Enter a title for your product. The title should be the name for your product as you want your customers to see it. Make sure to fill out additional details.

What are these details? Let's go over the basics you'll need to start selling, keeping in mind that you can always go back and add more information at a later date.

- **Description** - Describe your products in detail to inform and persuade your potential customers. You should tell a short story about your product, using keywords to highlight features, benefits, materials and more.
- **Media** - This can be your product images, videos or a 3D Model.
- **Price** - The price that you're charging for the product. Click Charge taxes on this product if the product is taxable.
- **Quantity** - Number of units in stock.
- **This is a physical product** - The setting for whether a product needs to be shipped. Uncheck it for digital products or services, or for products that you never ship.

Add a Product

- **Weight** - The product's actual weight, if it's a physical product. Product weight needs to be exact because it is used to calculate shipping rates.

Step 4: Click **Save**

Step 5: Now repeat the process for your other best sellers.

Read: *If you wish to import your full inventory and have a CSV file handy you can follow the steps in [this guide](#).*

If you have a **large inventory or complex needs**, it might seem daunting to get your online store setup with all your products.

One thing to consider is to **start with a smaller collection of products like your Best Sellers**. This way you can get up and running quickly so you can get selling and learn more about driving & converting traffic to your online sales channel.

Set up a Gift Card

What is a gift card?

A gift card is a special type of product. Its value can be used as payment toward future orders from your online store.

The gift card feature is available on all Shopify plans.



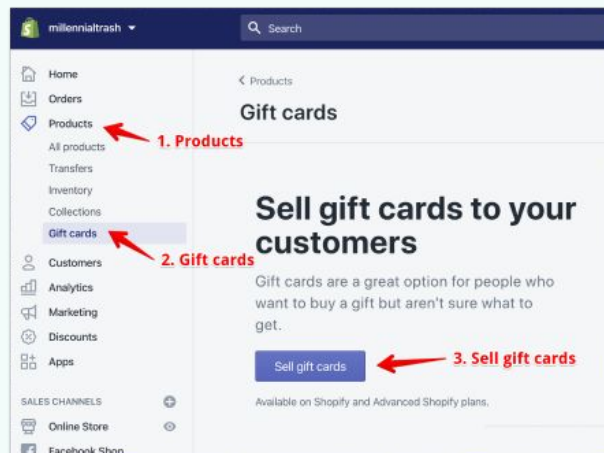
Preview of the gift card

Read: [Selling gift cards](#)

Activate the gift card feature

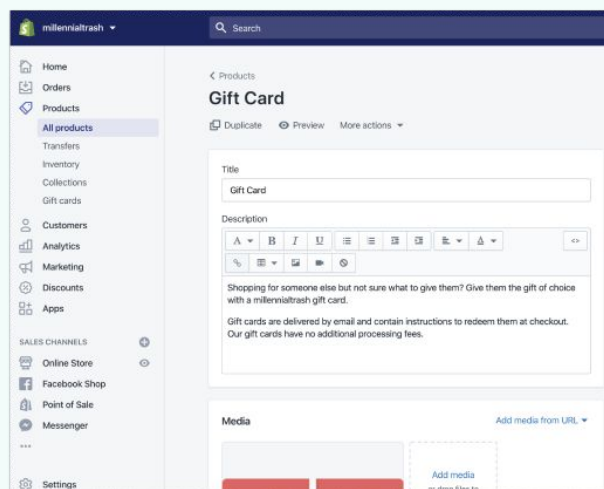
1. From your Shopify admin, go to Products > Gift Cards.

Click Start selling gift cards on my store.



Add or update a gift card product

1. From your Shopify admin, go to Products > Gift Cards.
2. Click manage gift card products.
3. Click the gift card product name.
4. Enter the gift card's information and add customization.
5. When you're done, click save gift card product.

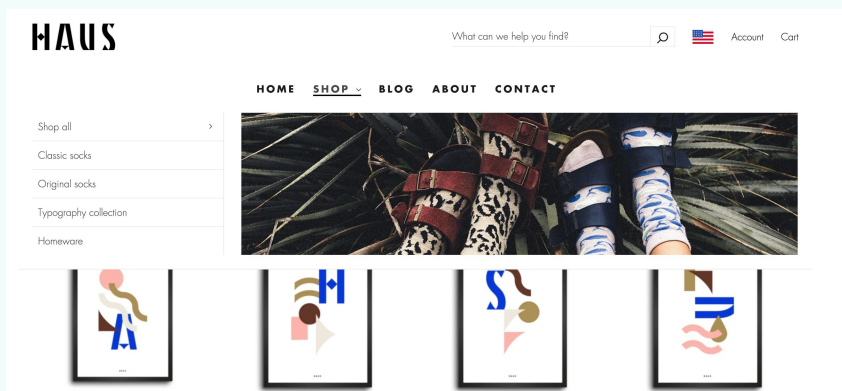


For more advanced features you can check out apps like [Rise and others here](#) or learn more about **building loyalty & engaging your established customers on [our blog](#)**.

Read: [Adding or updating gift card products](#)

Create a Collection

What is a collection?



A collection lets you organize products into groups. It also lets your customers easily browse your online store and find what they're looking for.

If you're running a fashion store, for example, you can categorize your products into collections like *Womens*, *Mens*, or *Accessories*. You can also create sub collections nested within a collection, like *Pants* or *Outerwear*.

Collection Types

To get started, think about how you already merchandize your products in your store. Are there certain sections of your store for certain styles of clothes? Choose your most popular items and try building a collection for those products in your online store.

There are two types of collections: **Manual** and **Automated**.

Manual collections include the specific products that you choose and manually upload.

Read: [Manual collections and how to set them up](#)

You can also set up **Automated collections** which use conditions to include products that match the rules & tags you create on your products.

Read: [Automated collections and how to set them up](#)

If you'd like help setting up your collections or want a consult on what might work for your business, you can [look to hire an expert here..](#)

I've Set Up a Collection... Now What?

Congrats, you've done the heavy lifting! Now that you've created your collection, you'll want to:

- **Add links to your collection in the navigation** so your customers can find and view it on your online store. Here's a [step-by-step guide](#).
- **Manage collections on your sales channels** to make sure they are available on the sales channels that you use. You can also specify a future date when the collection will be published. Learn more about that [here](#).
- **Configure your collection's layout and appearance**, including the collection name, description, featured image, or display order of its products. More on that [here](#).

How-to's

Watch: [What is a Shopify Collection?](#)

Watch: [How to create manual collections](#)

Watch: [How to create automated collections](#)

Read: [Collections Help Center doc](#)

Shipping

Understanding Shipping

Understanding the best ways to ship your products to your customers is an important part of running your business. Before you take your first order, you need to decide what shipping methods you want to use, and then set up your store's shipping so that your customers can choose a delivery method at checkout.

Before you set up your shipping, it's a good idea to read about the different shipping carriers, the different shipping rates you can offer, and how to work with any dropshipping or fulfillment services. After you understand how shipping works in Shopify, you're ready to create your shipping profiles, decide on your shipping zones, and set your shipping rates.

Read: [Understanding shipping](#)

Shipping

Setting up and managing your shipping

The Shipping Section of the Store can be found by going to **Settings > Shipping**.

After you understand how shipping works, the next step is to set up your shipping strategy.

You can add flat or calculated shipping rates to your general shipping profile that apply to all your products, or add products to custom shipping profiles with their own shipping rates.

If you ship from multiple locations, then you can set shipping rates per location within each shipping profile for greater control over your shipping costs.

Read: [Setting up your Shipping](#)

Watch: [An Introduction To Shipping Profiles](#)

Shipping During COVID-19

There are also a large amount of options for building out your Shipping Strategy on your store but, here are some that might quickly help you get customers the products they want & need during this time:

Delivery: If you can drop off orders, [create a local delivery option](#) only visible to customers who live in that zone.

Buy Online, Pickup Curbside (or in-store): Curbside pickup allows customers nearby to buy something online and drive by your storefront or your “curb” to pick it up. This “drive-through” option is often more convenient and it can reduce shipping costs and minimize person-to-person interactions. If you’re a brick and mortar retailer using Shopify POS, [here’s](#) how you can quickly set this up and if you’re not [here’s](#) a tutorial you can follow to quickly set this up on your new store.

For more easy ways to setup other shipping options or ways to easily manage your orders, we have [a collection of Shopify Apps](#) that can help.

Read:

[Local shipping and delivery Shipping Checklist](#)

Taxes

The Taxes Section of the Store can be found by going to **Settings > Taxes**.

As a merchant, you might need to charge taxes on your sales, and then report and remit those taxes to your government. Although tax laws and regulations are complex and can change often, you can set up Shopify to automatically handle most common sales tax calculations. You can also set up tax overrides to address unique tax laws and situations.

Shopify uses many default sales tax rates, which are updated regularly. If you use the default rates, then you need to confirm that they are current and correct for your particular circumstances. You can override them whenever necessary.

Read:

[Tax overview](#)

[General set-up steps and tax reports](#)

[US taxes](#)

[Canadian taxes](#)

[Non-US taxes](#)

[Shopify POS taxes](#)

[3rd party apps to help you with taxes and reporting](#)

Set Up Payment

Step 1: At the bottom of your admin you will see a notification bar to select a plan, click the button.

Step 2: Choose the plan you want. The basic plan is likely all you need to start.

Step 3: You'll be prompted for payment information but you won't be charged for 90 days. Start your plan once you've added your payment info.

Step 4: Select settings in the bottom left hand corner and select payment providers.

There are a few different things to consider when you're choosing which payment methods to offer. If you want to let your customers pay using a credit card, then you can use [Shopify Payments](#) or a [third-party provider](#). Once you've selected a form of payment you can follow the steps for setup [here](#).

At this time, you might notice that people are hesitant to purchase high-priced goods. To help, you could consider providing your customers a buy now, pay later payment solution or finance payment option that **allow them to pay in installments**. Learn more about those options [here](#).

Watch: [How to choose a payment provider](#)

Selecting Currency

Before making any sales, you'll want to ensure you're selling in your preferred currency. You can view/change your store currency in the **Store Currency** section of the **General Settings** page within your admin.

If you are selling with Shopify Payments, you can choose to have a different customer-facing store currency than the currency in which you receive your payouts.

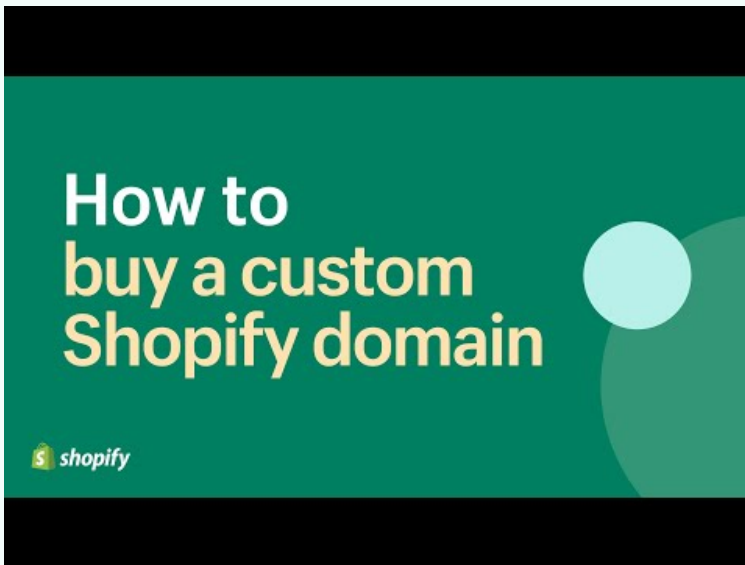
Let's say you are located in Canada but you plan to focus your marketing in the United States, you're able to set your store currency to USD and your payout currency to CAD, reflecting that of your own bank account.

You'll want to be certain of your preferred store currency before you begin making sales. If you choose to change your store currency later down the line, your reports will show inaccurate amounts..

Read: [Selling and Getting Paid in Different Currencies](#)

Customize Your Storefront

Domains



Your *primary domain* is the domain that customers see when they visit your online store. By default, your primary domain is your myshopify domain, which looks like `your-store-name.myshopify.com`.

You use your `.myshopify.com` domain to login to your store and identify your account when you contact Shopify Support. You can't change your `.myshopify.com` domain but you can buy a custom domain or use a custom domain that you already own.

Read:

[Buy a custom domain](#)

[Use a custom domain that you already own](#)

Upload Your Images/Branding

You want to start by personalizing your store by making it look like your store! Add your logo, brand images, as well as videos that help customers get to know who you are. If you don't have those files, don't worry! It's simple enough to design a logo and add it to your store.

Checkout the resources below to get started.

Read:

[Upload existing brand assets to your store](#)

[5 Easy to Use Online Logo Makers to Design Your Brand](#)

[Download free, high resolution photos to tell your story](#)

Navigation

After you add products and create collections, webpages, store policies, or blog posts, you need to organize them on your online store so that customers will be able to find them.

Keep in mind that most themes have pre-built navigations that generally apply best practices.

To see what works best for you and your customers, learn how to customize using the references below.

Read:

[Shopify Menu and Links](#)

[Navigation best practices and context](#)

Ecommerce Navigation: Getting People to Find and Buy More Products

by - Customer Experience
Jan 9, 2017 - 10 minute read



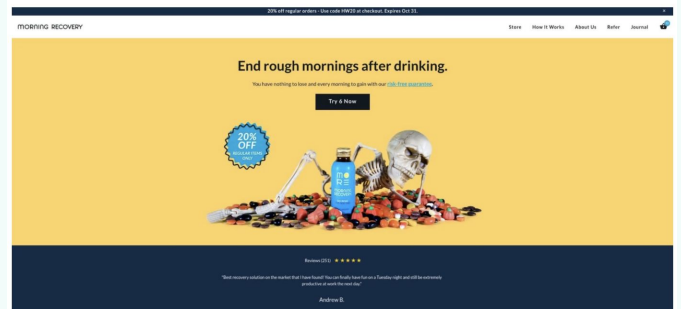
Pages

If you have a Shopify online store, then you can create web pages in your Shopify admin. Web pages contain information that rarely change or that customers will reference often, like an "About Us" page or a "Contact Us" page.

1. "Above-the-fold" content that inspires action

When web designers talk about an area of the homepage as "above the fold," they're referring to what visitors see before they decide to scroll.

When considering what lies above the fold and how that accompanies the rest of your homepage, focus on the actions you want the visitor to take when they first land on your site, the information they need first, and how you can help facilitate their decision.



Read:

[Learn all about how to add, edit, and delete a webpage](#)

[What to include in an "About Us" page](#)

[Add a blog to your online store for content you're updating regularly](#)

[Expert advice on improving product pages](#)

[Best practices on homepage design](#)

Additional Considerations During Covid-19

During these uncertain times, it's important that you create pages for your customers that address your business' response to Covid-19.

We know this may be overwhelming and hard to navigate. Here are some resources to help you add content to a page surrounding this topic.

Read:

[Providing store policies](#)

[Adding a page to your online store about Covid-19 and your business](#)

Order Notifications

Your store comes with email templates that you can customize with your logo and brand colors.

You can choose to have email notifications sent to you, your staff, or your customers, depending on the setting for your order notifications.

You can view and update your store's notification settings from the [Notifications](#) settings page in your Shopify admin.

Read: [How to edit notifications](#)

Import Customer List

Hopefully you've been collecting customer data from your retail store. If you have this information, it will make the transition to an online experience seamless.

The crucial pieces of information you will need:

1. Customer name
2. Customer email address
3. Bonus: customer phone number

Learn how to [import your customers list](#) into Shopify so you have the ability to contact them and let them know you're still there for them, online!

Once you have your customer list imported, it's important to put together a plan on how you will contact them and let them know that you're there to serve them digitally.

Consider writing an email with your store logo and let them know what they can expect when they shop with you online.

[Here](#) are some email apps you can use to contact customers.

Read: [Importing customer lists](#)

Fulfillment & Order Management

Fulfillment refers to the process of preparing and delivering a customer's order. Checkout this summary of what it entails [here](#).

Basics of processing orders with Shopify

- You receive a new order notification by email.
- The Orders page of Shopify shows the new order.
- The customer receives an order confirmation email.
- Order processing begins.

Read: [Processing orders](#)

Setting up fulfillments

Before you begin fulfilling orders you want to make sure your settings are appropriate for your business.

Step 1: Choose your fulfillment methods. Learn more about choosing the right method [here](#).

Step 2: Choose manual or automatic fulfillment. Learn more about picking the best way to fulfill your orders [here](#).

Order Fulfillment

Once you've setup your fulfillment settings you can start fulfilling orders.

This depends on what method and fulfillment type (auto or manual) you chose. Lets go over the basic steps to manually fulfill orders with Shopify.

If you set your orders to fulfill manually, then you need to open your orders and fulfill the line items. You can either:

- Fulfill an entire order manually. Learn more [here](#).
- Fulfill part of an order manually. Learn more [here](#).
- Fulfill several orders at once. Learn more about this process [here](#).

Read: [Fulfilling your own orders](#)

Order Editing

Sometimes your customers will ask you to add more products or adjust the item quantities after completing a sale. You can do this by editing the order!

Editing orders is as simple as selecting the order that you want to edit, clicking *Edit* at the top, and adjusting quantity, removing items or adding more products.

Read: [Editing orders](#)

Refunds and Cancellations

Refunding an order results in the payment being sent back to the customer.

Step 1: Head to *Orders* in your Shopify admin.

Step 2: Click in the order you'd like to refund.

Step 3: Click *Refund items*

Step 4: Enter the quantities to refund

Step 5: If you've shipped the items, but your customer hasn't returned them yet, then uncheck *Restock items*.

Step 6: Click *Refund*.

Read: [Refunding and cancelling orders](#)

Watch: [How to issue a refund](#)

Create Draft Orders

The orders that you create on behalf of your customers are named 'draft orders'. These are helpful in times when you need to accept payment for an order that you made over the phone, to manually recreate mistaken orders, or to send an invoice to a customer so they can pay with a secure checkout link.

Step 1: From your Shopify admin, go to *Orders*

Step 2: Click *Create order*.

Step 3: Add products to the order.

Step 4: Customize the order, by adding a customer, discounts, or even tags.

Step 5: Email the invoice to the customer, accept the payment or save the order so you can update it later.

Read: [Creating draft orders](#)

Watch: [How to create draft orders](#)

Test Your Store

Before you launch your store it is important to test your orders and payments.

There are three ways to place a test order:

1. Use Shopify [Bogus Gateway](#) to simulate a transaction.
2. Use a real payment provider, and then immediately cancel and refund the order.
3. If you're using Shopify Payments, then you can test your configuration by following these [instructions](#).

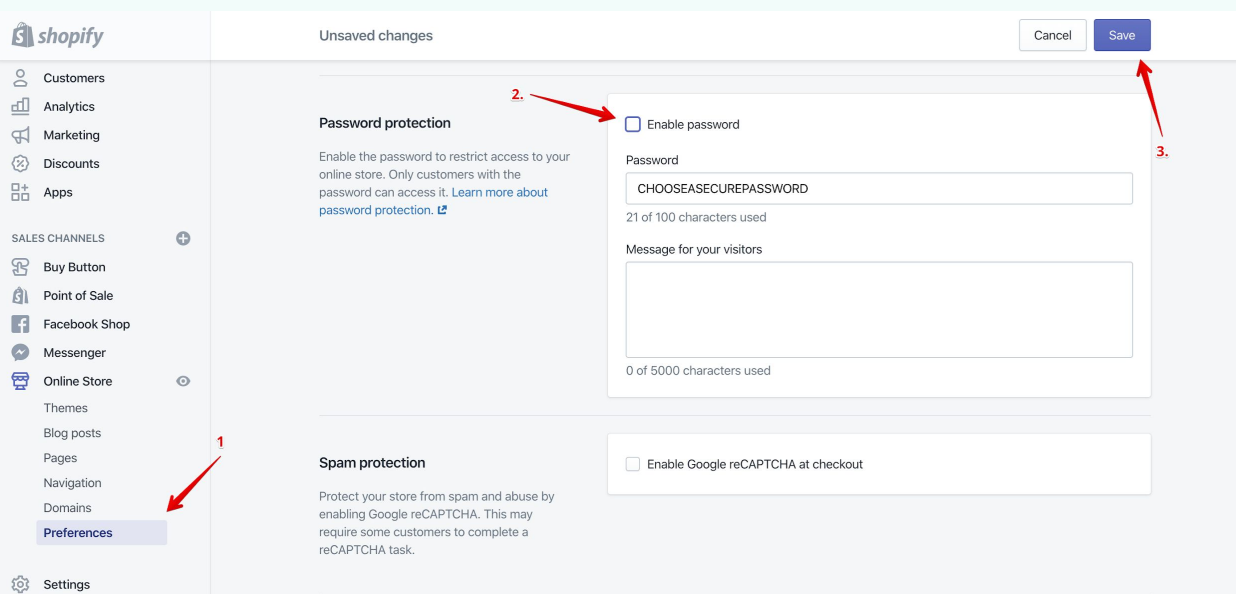
Read: [Shipping Labels from Shopify](#)

Read: [Placing a test order help document](#)

Launch Your Store

You've tested to ensure your payments and orders process, now it's time to launch your store! Launching your Online Store allows your shop to be publicly accessible to customers, so you'll want to make sure you're happy with how the store looks before going live.

1. From your Shopify admin, go to **Online Store > Preferences**.
2. In the password page section, uncheck the **Enable Password** page option.



Read: [Preparing your Shopify Store for launch](#)

Market Your Online Store & Increase Sales

Once your Shopify store is launched, it's time to start generating sales. A key component of that is creating marketing campaigns and driving traffic to your online store.

Here are a few resources that will teach you:

- 1) How to drive traffic to your online store
- 2) Help recreate the in-store experience online
- 3) Connect with existing loyal customers and reach new audiences

Market Your Online Store & Increase Sales

Get started with marketing your online store

To help you get started with making sales online, Shopify's put together a marketing checklist that outlines free and paid marketing channels you can leverage.

Read: [How to Get Your First Sale in 30 Days: A Marketing Checklist for New Entrepreneurs](#)

Run marketing campaigns right within Shopify

Shopify Marketing gives you the power to create, run and measure marketing campaigns without leaving Shopify. With Shopify Marketing, creating marketing campaigns on popular ad platforms (like Facebook, Google, Snap, and Pinterest) has never been simpler and there's no more tab overload as you switch between multiple platforms.

Read: [Setting up marketing in Shopify](#)

Market Your Online Store & Increase Sales

Reach potential customers across Google Search, YouTube and Gmail

Shopify's Google Shopping integration makes it easy for you to promote your products across Google's network and reach engaged shoppers. Just sync your products, set a daily budget, and let Google optimize your campaigns so they appear in front of interested shoppers.

Install: [Google Shopping app, available for free](#)

Watch: [Google Ads for Ecommerce, a free Shopify Academy course](#)

Read: [Google Shopping help guide](#)

Turn store visitors into loyal customers through Facebook retargeting campaigns

Shopify's Facebook Marketing integration lets you create dynamic retargeting ads that remind previous visitors of your store to complete their purchase, recommend products similar to ones they've viewed or purchased in the past, and even promote exclusive discounts. Dynamic retargeting ads are an effective way of nurturing your traffic and driving conversion.

Install: [Facebook Marketing app, available for free](#)

Read: [Facebook Retargeting: How to Win Back Your Almost-Customers](#)

Read: [Creating Facebook dynamic retargeting ads](#)

Market Your Online Store & Increase Sales

Build an email list to establish and grow relationships with your customers

As your site receives traffic, it's important you collect emails for future conversions and build relationships with your audience. While first time visitors won't immediately make a purchase, they are likely to give their email.

Check Out: [Email list building apps on the Shopify App Store](#)

Engage with existing loyal customers and new fans of your brand through email

Once you have a sizeable email list, it's time to engage with that list! Email marketing lets you send marketing messages to prospective and current customers to sell, educate or build loyalty. Email is widely known as the most effective way to generate sales, and it allows you to communicate both with existing loyal customers (who know you from your physical retail store) and new fans of your brand.

Check Out: [Shopify Email, apply for early access](#)

Check Out: [Email marketing tools in Shopify Marketing](#)

Read: [Learn Email Marketing: Everything from List Building to Advanced Lifecycle Automation](#)

Market Your Online Store & Increase Sales

Use chat to promote your products and automate your business

Kit is a chatbot that lets you use the power of chat to create and manage digital ads, engage with customers, and automate business tasks. This free virtual assistant will also send proactive recommendations to let you know of marketing opportunities that can drive sales.

Install: [Kit](#)

Read: [8 Ways Kit Can Help You Make Your First Sale](#)

Recreate the in-store experience online by offering visitors live chat

Studies have shown shoppers that use live chat are 2.8X more likely to convert than those that don't. Shopify Ping is a free messaging app that allows you to manage all customer conversations and help customers make more informed purchases with confidence. Shopify Ping makes it easy for you to connect with customers and answer any questions they have, recommend specific products, or share exclusive discounts.

Install: [Shopify Ping, available for free on iOS](#)

Read: [Talking with customers using Shopify Ping](#)

Facebook and Instagram sales channels

You can use Shopify to sell your products on different online sales channels. Sales channels represent the different marketplaces where you sell your products. By connecting each sales channel to Shopify, you can keep track of your products, orders, and customers in one place.

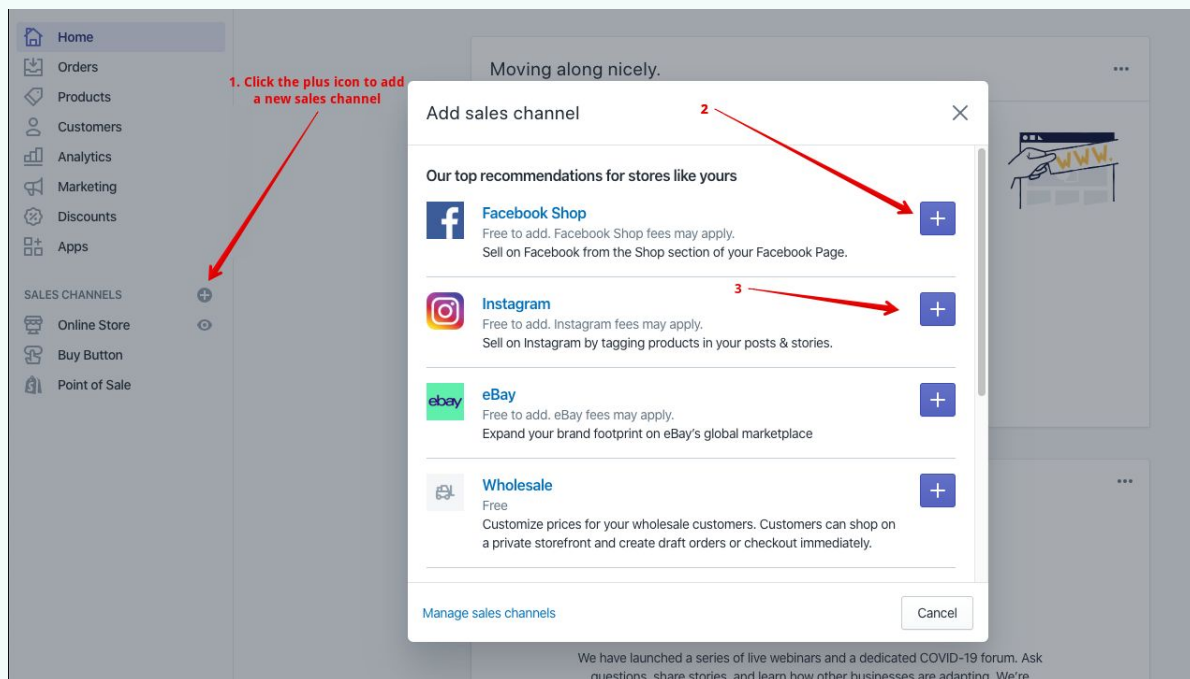
Selling on Facebook with Shopify

When you add the sales channels you can then push your products to the Facebook store and have the customers be able to purchase from there and checkout directly on your store checkout. This is a great avenue to use when trying to build out your customer base and get your products seen by new customers.

Read: [Adding your Facebook Sales Channel](#)

Watch: [How to add a sales channel](#)

You can add the Facebook and Instagram sales channels directly from your Shopify Admin. You need to click add a sales channel from your admin. Then once you have added the Facebook sales channel you will be asked to connect your personal page (this is only for linking purposes, customers will not see this) and then connect your Facebook business page. When connected it will take **24-48 hours** for your products to appear on the Facebook Shop.



Read:

[Facebook Shop requirements](#)

[Setting up Facebook Shop](#)

[Publishing products on Facebook by using Facebook Shop](#)

[Processing orders from Facebook](#)

Selling on Instagram with Shopify

Once you have added the Facebook sales channel you can then connect your Instagram account in the Instagram sales channel.

You add this sales channel the same way as the Facebook one. Click add sales channel and then select Instagram. Once this is added you can then connect the Facebook account (all Instagram settings are held in Facebook) and then select your Instagram account.

Read:

[Adding the Instagram sales channel](#)

[Requirements for the Instagram sales channel](#)

[Setting up the Instagram sales channel](#)

[Tagging products in Instagram posts](#)

Resources

If at any point you have questions or need help we have [24/7 Support](#) available through call, chat or email.

Additionally, you can learn more in our Help Centres linked below, [Shopify Academy](#), the [Shopify blog](#), or the Shopify [Community Forums](#).

- [Shopify Help Centre](#)
- [Shopify Help Centre Youtube Channel](#)

[The Experts Marketplace](#) helps you find Shopify experts you can hire to help build your business. Experts are trusted, third-party agencies and freelancers who offer services for Shopify merchants, including the following:

- Marketing and sales
- Store setup
- Development and troubleshooting
- Content writing
- Visual content and branding
- Expert guidance

To help businesses during COVID-19, you can find Shopify experts [here](#) who can help you adapt to these challenging times here.