



Quick Guide to Starting a New Shopify Store

Overview

Depending on your needs, there are a lot of good options for setting up an eCommerce site. CBLDF uses Shopify to process some of our donations, and has had good experience with it, so we wanted to share our knowledge and provide a resource for launching your own eCommerce store.

Shopify can be a great resource for bringing your business online, and is currently offering services that cater to the unique circumstances we find ourselves in, including local delivery and pick-up options.

Shopify also has an intuitive POS app that can handle multiple locations and inventories where you can manage what is sold online or in-store. Their set-up process is relatively quick and easy, and their support staff is quick to respond to questions.

Useful Support Pages

- Covid-19 Resource Page: shopify.com/covid19
- In-Store Pick-Up FAQs: <https://help.shopify.com/en/manual/sell-in-person/pos-classic/shopify-pos-from-admin/buy-online-pickup-in-store>

This guide is intended to serve as an easy-to-navigate starting point for setting up your store, and is not a comprehensive guide. Please see Shopify's interactive checklist for a detailed list of steps:

<https://help.shopify.com/en/manual/intro-to-shopify/initial-setup/getting-started-to-do>

Signing Up & Setting Up

STEP 1 | Sign up for an account

- Click here to visit Shopify's new resource page: shopify.com/covid19. Scroll down to the "How We're Helping" section.
- They're currently offering a number of helpful resources and programs to assist local businesses, including a **90-day free trial** of their platform.

How we're helping

Gift cards for all plans and customers
Give customers a way to support you now, while freeing up cash flow by offering gift cards. We're making [physical and digital gift cards](#) available on all new and existing Shopify plans.

Local pickup and delivery
Flatten the curve, while getting products into the hands of your local customers. If you can drop off orders, [create a local delivery option](#) only visible to customers who live in that zone. Brick and mortar retailers using Shopify POS will have the opportunity to offer customers [in-store/curb-side pick up for online orders](#).

\$200 million in small business funding
Weather these challenging times with access to funding with [Shopify Capital](#). We're working with governments to make our capital offerings available in more countries as soon as possible.

Community support
Connect with fellow business owners and get support in our [COVID-19 community forum](#).

Extended 90-day free trial
Take the time you need to move your retail store online, or build a new online store. We're offering a [90-day free trial](#) for all new customers. If you're currently on a 14-day trial, you can extend it to 90 days.

Live webinars
We're bringing our [community together online](#), with weekly virtual programming designed to help your business through these uncertain times.

STEP 2 | Activate your store

- Answer a few questions from Shopify and add your business name and address. Your store is now active and ready to fill out!
- You have a lot of flexibility with the setup process from here. See page one for a link to Shopify's comprehensive setup checklist!
- Keep reading for an overview of next steps for setting up products, point-of-sale and locations, shipping integration, and some miscellaneous tips.

STEP 3 | Navigate your store

- No matter what your next steps are, it's a good idea to become familiar with Shopify's interface. Check out this page for a quick guide: <https://help.shopify.com/en/manual/intro-to-shopify/shopify-admin/shopify-admin-overview>

Creating Your Storefront

STEP 1 | Choose your theme (optional)

- If you'd like to change the look of your store, you can find a new theme—Shopify offers free and paid themes for your shop. Click here to learn more: <https://help.shopify.com/en/manual/using-themes>
- The 'Theme' section of your admin page allows you to do other basic design updates, including: adding your logo, change the font and colors, editing shopping cart appearance, product options, & more.
- Shopify lets you preview all of these changes before making them live, whether your store is brand-new or just needs a redesign.

STEP 2 | Add your products

- Get some items onto your new store! Go to the "Products" page using your admin sidebar, and click the "Add Product" button in the top right corner.
- Add product details to this page. You can also: add different "Variant" options like size or color, and organize your products with "tags" and "collections" you want to feature on your store.
- Check out Shopify's complete product manual here: <https://help.shopify.com/en/manual/products>

STEP 3 | Manage your inventory

- Shopify allows you to set up separate inventories for your online and POS sales channels. You can also set up multiple locations if you have multiple physical stores, and choose to sell those location's items both in-store and online.
- Learn more about inventory management here: <https://help.shopify.com/en/manual/products/inventory>

STEP 4 | Track your sales

- Shopify has built-in features to help you track your sales and generate reports so you can learn more about your orders and customers.
- Learn more about Shopify reporting here: <https://help.shopify.com/en/manual/reports-and-analytics/shopify-reports>

Shopify POS & Locations

STEP 1 | Set up Shopify POS on your store

- Download the Shopify POS app on a tablet or smartphone, and sign in to begin syncing your products to your device. (If you don't see products, make sure you've made them available on both sales channels!)
- Check out Shopify's retail guide here: <https://help.shopify.com/en/manual/sell-in-person/pos-classic/shopify-for-retail>, and FAQ page here: <https://help.shopify.com/en/manual/sell-in-person/pos-classic/faq#getting-started>

STEP 2 | Setting up locations

- A location is essentially anywhere you stock or manage inventory. Products are assigned both a sales channel (online or POS) and a location to ensure that your inventory is tracked properly.
- To add a location, go to your admin and navigate to: "Settings>Locations". Click "Add Location" and enter a name and address. Choose whether or not to fulfill online orders from this location, and save.
- Learn more about locations here: <https://help.shopify.com/en/manual/locations>

Shipping Integration

STEP 1 | Find a solution for your store

- Every store has unique operational and financial needs, and you should find a shipping service that fits yours best.
- If you don't want to go to the post office, you can schedule pick-ups and purchase postage online. [Stamps.com](https://www.stamps.com/) & [Shipstation](https://www.shipstation.com/) are popular solutions that integrate easily with Shopify, and are both offering **month-long free trials** when you sign up.
- Set up dedicated local delivery with Shopify & 3rd Party Apps: <https://help.shopify.com/en/manual/shipping/setting-up-and-managing-your-shipping/local-shipping#add-a-local-delivery-shipping-rate-app>

Miscellaneous

Setting Up Staff Accounts

- You can set up separate accounts for your staff to process orders and manage inventory. Whether they're in store or at home, they can work to create, improve, and promote your online store. Follow the link for more information: <https://help.shopify.com/en/manual/your-account/staff-accounts>

Payment Details

- Don't forget to pay attention to details like tax settings and payment methods! Click here for Shopify's store management support page: <https://help.shopify.com/en/manual/intro-to-shopify/initial-setup/setup-store-management#step-by-step-set-up-your-taxes> and here for more detail on payments: <https://help.shopify.com/en/manual/payments>

Using Apps

- There are a lot of helpful apps in the Shopify store (and some not so helpful). Do a little research if you see one you like and make sure it's got decent reviews. Find out more here: <https://help.shopify.com/en/manual/apps>

Linking Shopify to Social Media & More

- You can promote your shop and sell straight from your social media channels with Shopify—follow this link for more information: <https://help.shopify.com/en/manual/sell-online>

Migrating an existing store

- If you have an existing ecommerce platform you'd like to migrate to Shopify, find out more here: <https://help.shopify.com/en/manual/migrating-to-shopify>