Creating Products and Customers

# Introduction

This article provides a comprehensive guide on how to create products and customers within the platform. It covers the necessary steps and key features involved in both processes, enabling you to effectively manage your store's inventory and customer base.

# Key Elements and Sections Involved

## Products

The 'Products' section, located in the left navigation sidebar, allows you to manage your store's inventory. From here, you can add new products, edit existing ones, and organize them into collections.

## Add product

The 'Add product' button, located on the Products page, navigates you to the product creation page.

## Title

The 'Title' field, at the top of the 'Add product' page, is where you enter the name of your product. The placeholder text suggests 'Short sleeve t-shirt' as an example.

## Description

The 'Description' section provides a rich text editor where you can add detailed information about your product. This includes formatting options such as bold, italics, and lists.

## Media

The 'Media' section allows you to upload images, videos, or 3D models to showcase your product. You can either upload new files or select existing ones.

## Category

The 'Category' section helps you categorize your products for better organization and searchability. It determines tax rates and adds metafields to improve search, filters, and cross-channel sales.

## Pricing

The 'Pricing' section allows you to set the 'Price' and 'Compare-at price' for your product. There is also a checkbox to 'Charge tax on this product'.

## Price

The 'Price' field, within the 'Pricing' section, is where you enter the selling price of your product. The placeholder text shows '0.00'.

## Compare-at price

The 'Compare-at price' field, within the 'Pricing' section, allows you to show a discounted price compared to a higher original price. The placeholder text shows '0.00'.

## Charge tax on this product

The 'Charge tax on this product' checkbox, within the 'Pricing' section, determines whether sales tax will be applied to the product.

## Cost per item

The 'Cost per item' field allows you to track the cost of goods sold. This is not visible to customers. The placeholder text shows '0.00'.

## Inventory

The 'Inventory' section allows you to manage your product's stock levels. You can 'Track quantity' and set whether to 'Continue selling when out of stock'.

## Track quantity

The 'Track quantity' checkbox, within the 'Inventory' section, enables you to monitor the stock levels of your product.

## Quantity

The 'Quantity' field, within the 'Inventory' section, shows the available stock at the 'Shop location'.

## Continue selling when out of stock

The 'Continue selling when out of stock' checkbox, within the 'Inventory' section, allows customers to purchase the product even if it's currently out of stock.

## Shipping

The 'Shipping' section allows you to specify if 'This is a physical product' and set the 'Weight'.

## This is a physical product

The 'This is a physical product' checkbox, within the 'Shipping' section, indicates whether the product needs to be shipped.

## Weight

The 'Weight' field, within the 'Shipping' section, is where you enter the product's weight. The placeholder text shows '0.0'.

## Variants

The 'Variants' section allows you to add options like size or color for your product.

## Search engine listing

The 'Search engine listing' section allows you to add a title and description to see how this product might appear in a search engine listing.

## Customers

The 'Customers' section, located in the left navigation sidebar, allows you to manage your customer base. From here, you can add new customers, edit existing ones, and view their order history.

## Add customer

The 'Add customer' button, located on the Customers page, navigates you to the customer creation page.

## First name

The 'First name' field is where you enter the customer's first name.

## Last name

The 'Last name' field is where you enter the customer's last name.

## Email

The 'Email' field is where you enter the customer's email address.

## Phone number

The 'Phone number' field is where you enter the customer's phone number.

## Customer agreed to receive marketing emails.

The 'Customer agreed to receive marketing emails' checkbox allows you to indicate whether the customer has consented to receive marketing emails.

## Customer agreed to receive SMS marketing text messages.

The 'Customer agreed to receive SMS marketing text messages' checkbox allows you to indicate whether the customer has consented to receive SMS marketing messages.

## Default address

The 'Default address' section allows you to add the customer's primary address.

## Add address

The 'Add address' button within the 'Default address' section allows you to enter the customer's address details.

## Notes

The 'Notes' section allows you to add private notes about the customer that won't be shared with them.

## Tags

The 'Tags' section allows you to add tags to the customer profile for better organization and filtering.

# Detailed Step-by-Step Guide: Creating Products and Customers

1. Step 1:

In the left navigation sidebar, click 'Products'.

1. Step 2:

On the Products page, click 'Add product'.

1. Step 3:

On the 'Add product' page, in the 'Title' field at the top of the page, enter the product title (e.g., 'Sample Item').

1. Step 4:

In the 'Media' section, click 'Upload new' to upload a product image.

1. Step 5:

In the 'Pricing' section, enter the 'Price' (e.g., '500.00').

1. Step 6:

Optionally, enter a 'Compare-at price' (e.g., '600.00').

1. Step 7:

If applicable, check the 'Charge tax on this product' checkbox.

1. Step 8:

In the 'Shipping' section, enter the 'Weight' (e.g., '5').

1. Step 9:

Click 'Save' to save the product.

1. Step 10:

In the left navigation sidebar, click 'Customers'.

1. Step 11:

On the Customers page, click 'Add customer'.

1. Step 12:

On the 'New customer' page, enter the customer's 'First name' (e.g., 'Jane').

1. Step 13:

Enter the customer's 'Last name' (e.g., 'Doe').

1. Step 14:

Enter the customer's 'Email' address (e.g., 'example@email.com').

1. Step 15:

Enter the customer's 'Phone number' (e.g., '555-123-4567').

1. Step 16:

Check the 'Customer agreed to receive marketing emails' checkbox if applicable.

1. Step 17:

In the 'Default address' section, click 'Add address'.

1. Step 18:

In the address fields, enter the customer's address details, starting with the company name (e.g., 'Example Company').

1. Step 19:

Enter the customer's address (e.g., '123 Example Street'). If address suggestions appear, select the matching address suggestion from the list.

1. Step 20:

Enter the 'Apartment, suite, etc.' (e.g., 'New Apartment').

1. Step 21:

Click 'Save' to save the customer.

# Conclusion

By following this guide, you can effectively create and manage your products and customers. Properly managing your products and customer base is crucial for the success of your online store.

# Frequently Asked Questions

* Q: How do I edit an existing product?

A: Navigate to the 'Products' section, select the product you want to edit, and click on it. You can then modify the product details and save your changes.

* Q: How do I delete a product?

A: Navigate to the 'Products' section, select the product you want to delete, and look for a 'Delete' or 'Archive' option in the product details page or in the 'More actions' dropdown.

* Q: Can I add multiple images to a product?

A: Yes, in the 'Media' section of the 'Add product' page, you can upload multiple images, videos, or 3D models to showcase your product from different angles.

* Q: How do I add a customer to a specific customer group?

A: After creating a customer, you can add tags to their profile in the 'Tags' section. You can then use these tags to filter and segment your customer base.

* Q: How do I edit an existing customer's information?

A: Navigate to the 'Customers' section, select the customer you want to edit, and click on their name. You can then modify their details and save your changes.

* Q: Can I import a list of customers from a CSV file?

A: Yes, the 'Customers' section typically provides an 'Import' option that allows you to upload a CSV file containing customer data.