

# Shopify Store Setup Checklist



## Getting Access to a Store



1 

### If the client already has a store

- ✓ request access using the myshopify-url
- ✓ Immediately create a theme copy as a backup

2 

### If the client doesn't have a store yet


- ✓ Create a new development store
- ✓ Upload theme and select theme language
- ✓ Create a copy from the original as a backup

## Backend Setup



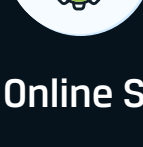
### GENERAL ADVICE:

If you run into any issues, research first.  
If you're missing any data, fill it with useful placeholders.  
Collect questions you may have and send them over to a client in bundles of 3-5

1 

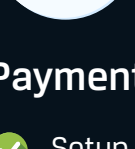
### General Settings

- ✓ Contact Details
- ✓ Unit system and Time zone
- ✓ Store currency

2 

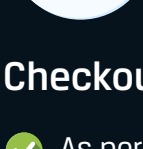
### Online Store Preferences

- ✓ Title and meta description
- ✓ Google Analytics + "Enhanced Ecommerce"
- ✓ Facebook Pixel

3 


### Payment settings

- ✓ Setup manual payment methods
- ✓ After the transfer of ownership, share this page with the client if authentication for payment provider is required

4 

### Checkout settings

- ✓ As per requirements or just assume the default settings as shown

5 

### Shipping Zones

- ✓ Only create shipping zones for countries where the client wants to sell
- ✓ Create a separate shipping zone for countries where different taxes apply

6 

### Tax Settings

- ✓ As per requirement
- ✓ Potentially create an override-collection for products where different taxes apply

7 

### Create First Products

- ✓ 3-5 products as per requirement
- ✓ Or import a few demo products

8 

### Create collections

- ✓ As per requirements or one demo-collection
- ✓ Explain how to add products to a collection

9 

### Create Pages

- ✓ As per requirement or 2-3 demo pages
- ✓ Also create legal pages (from template or provided texts)

10 

### Create navigation menus

- ✓ As per requirement
- ✓ Footer and header menu
- ✓ 5-7 first level items for the header
- ✓ Avoid level 3 nesting, unless mega menu

## Frontend Setup



### GENERAL ADVICE:

Don't leave any section empty !! This will be perceived as "Store is not ready yet"  
If you're missing content, fill it with placeholders and stock images.  
Disable all features that are not explicitly required.  
Don't overdo on colors. Less is more.

1 

### Header Setup

- ✓ Upload Logo File
- ✓ Setup Navigation / Mega Menus

2 

### Footer Setup

- ✓ 2 Link Lists + Newsletter or 2 Link Lists + Contact Details
- ✓ Social media Links

3 

### Product Pages

- ✓ As per Theme settings or requirements

4 

### Collection Pages

- ✓ As per Theme Settings or requirements
- ✓ Sample Product Filters / Product Tags

5 

### Frontpage Setup

- ✓ 5 Sections with demo content (Banner Image, Blog Posts, Testimonials, Gallery, Image with Text )
- ✓ Use Placeholder content if the client didn't deliver yet (no empty sections!)

6 

### Blog Settings

- ✓ Disable Author & Date
- ✓ Featured image yes/no

7 

### Checkout Settings

- ✓ Upload logo
- ✓ Eventually accent colors to match corporate identity

8 

### Color Settings

- ✓ Don't overdo it!
- ✓ If at all only adjust accent colors / button colors