

General checklist for starting a new Shopify store

This checklist outlines all the steps that you need to take to get started with Shopify. These steps will help guide you create, open, and promote your online store. You might find it helpful to print this checklist or to download it as a PDF so that you can refer to it throughout the setup process.

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Before you start

Before you start setting up your Shopify store, it's important to understand your goals. Ask yourself basic questions about your store. For example, do you want to sell your products both online and in person? Do you want to sell your products through social media channels like Facebook? This can help you to focus your attention and speed up your setup process. You might also

want to think about which pricing plan meets your needs. However, you don't need to choose a plan until the end of your trial.

- ☐ Find local experts to get advice about taxes and laws that are related to your business
- ☐ If you already have an ecommerce website, then consider migrating it to Shopify.
- ☐ Choose which sales channels you want to use
- ☐ If you're interested in selling in person, then learn about Shopify's point of sale hardware
- ☐ Think about which pricing plan you need

Set up your online store

Before you stock your Shopify store with products, you need to enter some information about yourself and your store. You need to decide on some basic standards for your product listings and customer transactions. Also, you need to set up your domain to make sure that your customers can find your store online.

- ☐ Log in to your store
- ☐ Password protect your store
- ☐ Name your store and set your legal business name
- ☐ Enter your business address
- ☐ Add your billing information

- ☐ [Set the default currency for your store](#)
- ☐ [Set a default weight unit for your store listings](#)
- ☐ [Set up your shipping settings](#)
- ☐ [Set up Shopify International, if applicable](#)
- ☐ [Set up pickup and local delivery](#)
- ☐ [Set up your taxes](#)
- ☐ [Set up your payment gateways](#)
- ☐ [Staff your store, if applicable](#)
- ☐ [Set up your domain](#)
- ☐ Explore the [Shopify App store](#) to view which apps could help you with your business

Organize your online store

The way that your store looks and the kinds of products that you're going to sell are two of the most important parts of your online store. Try a few different themes to see which one looks best, and then add some products to sell. Depending on how many products you plan to offer, adding and organizing your product listings can be the most time-consuming step of setting up a Shopify store. Be sure to give yourself plenty of time to add your products, to organize them into groups, and to set the necessary tax and shipping information.

- ☐ [Make your website look great with a theme](#)

- ☐ [Customize your theme](#)
- ☐ [Add your products](#)
- ☐ [Organize your products into collections](#)
- ☐ [Customize your menu and navigation](#)
- ☐ [Add a blog to your store](#)

Test your online store

Before you launch your online store, place some test orders to see how the checkout process works.

- ☐ [Test successful and failed transactions](#)
- ☐ [Test refunding and canceling orders](#)
- ☐ [Test fulfilling and partially fulfilling orders](#)
- ☐ [Test archiving successful orders](#)
- ☐ Learn about [Shopify's fraud analysis settings](#)

Open your online store

After you've picked a plan and tested your online store, you're ready for people to see it. You can remove your online store password, and add a chat widget to make it easy for online store visitors to ask questions.

- ☐ [Remove your online store password to give customers access to your store](#)

Add other online sales channels

After you launch your online store, your business might benefit from adding some other online channels to your Shopify store. There are several online channels that you can add to your Shopify admin when selling online.

Note

Each sales channel has eligibility requirements based on your region, your product types, and sometimes on your store's Shopify subscription plan. For more details, refer to your [plan's features](#).

- ☐ [Sell with Buy Buttons](#)
- ☐ [Sell on Facebook and Instagram with Facebook and Instagram by Meta](#)

Promote your online store

After you launch your online store, you need to promote it. You can improve your store's visibility by adding the information that will be used by search engines and by promoting your store in all of the appropriate spaces.

- ☐ [Define your home page metadata](#)
- ☐ [Promote your store](#)
- ☐ [Create a marketing plan](#)

- ☐ Set up Shopify Email and send your first email marketing campaign
- ☐ Improve your store's SEO
- ☐ Use discount codes and sales
- ☐ Customize your abandoned cart emails
- ☐ Read and respond to messages in Shopify Inbox

Grow your business

Looking for free online training with industry experts? Visit Shopify Academy to get access to courses and workshops designed to help you build your business.