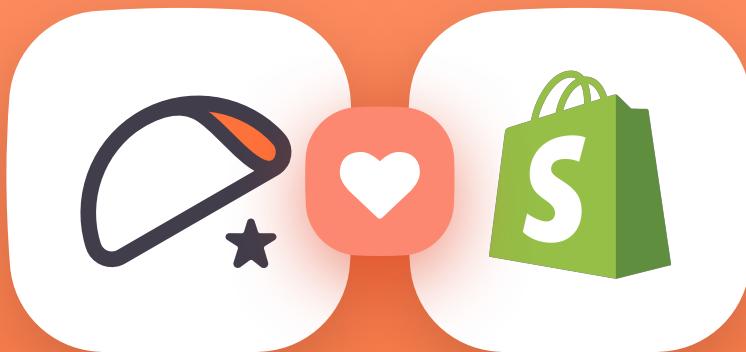


TAKO AGENCY PRESENTS

DIY Shopify Admin Store Guide



New to Shopify? No problem.

Here's a step-by-step launch guide for each section
within Shopify Admin.

Click here to set up your new store





Hi there!

I'm Z, founder of web design & development agency Tako Agency, where EVERY DAY is Tako Tuesday!

If you're reading this, you've probably just taken the leap onto the Shopify platform – congratulations! 🎉 Welcome to the wild and fun (and potentially very lucrative) world of e-commerce.

At Tako, we are all about helping you GROW YOUR ONLINE EMPIRE. We're crazy passionate design & development nerds, obsessed with building beautiful and functional websites & e-commerce stores for awesome people just like you. (Oh, and we make sweet mobile apps, too.) We'll even help you with marketing and branding, if you need it.

We developed this comprehensive step-by-step startup guide for anyone new to Shopify. It'll walk you through each area of your Shopify Admin, from adding and organizing products to setting up custom email templates and more. We're confident it'll take you from "Huh?" to LAUNCH faster than you thought!

Got a question? Tweet us @takoagency or drop us an email at help@takoagency.com. We're happy to help.

Happy building,

Zlatko B.
Founder, Tako Agency
www.takoagency.com.





Why did we create this guide?

It's pretty simple. We love Shopify and work with Shopify merchants around the world. Over the years, we noticed many of the same questions coming up over and over again – so we decided to do something about it! The guide that we've created here covers the basics you need to know to get started with your Shopify site.

Tako Agency is a Shopify partner, and we're proud to be partnered with a great company that empowers entrepreneurs across the globe. However, we want to be clear that we don't work for Shopify, and have no intention to misrepresent ourselves as being part of their brand. This is not an "official" Shopify guide. Instead, we put this document together based on our experience and expertise to serve as a stepping stone to get your business off the ground. If you have any questions, please email us at help@takoagency.com.



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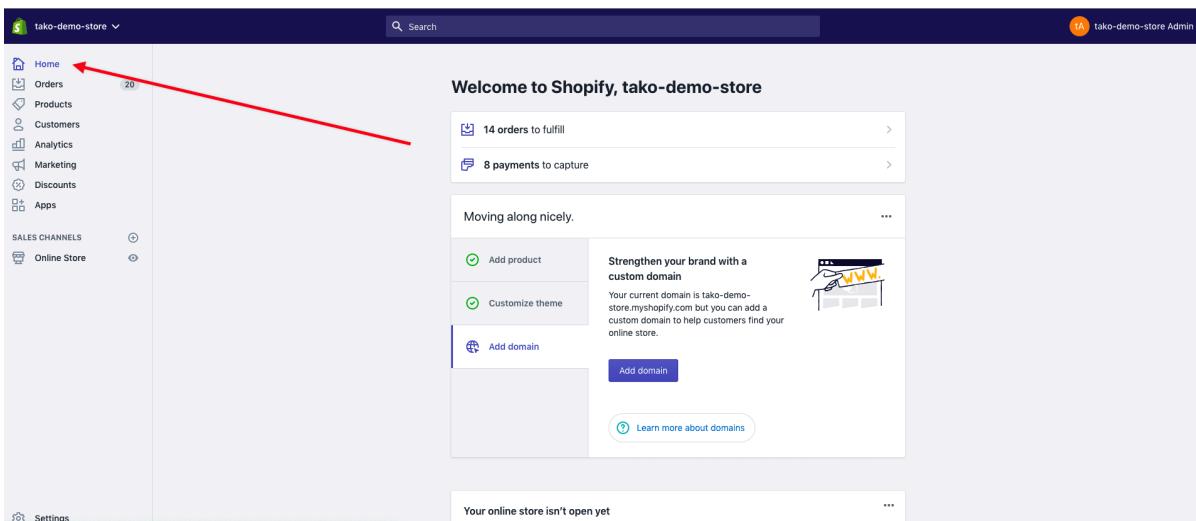
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Home

URL /admin 

Shopify Home shows information about daily tasks, your store's recent activity, and the next steps you can take to build your business.



The four squares right in the middle at the top give you a quick summary of your store's activity today. They are, left to right:

Today's sales shows the total sales made on your Shopify store on any given day. If you haven't made a sale yet that day, you'll see "No sales yet."

Today's orders shows the total number of orders made on your Shopify store on any given day. If you haven't had an order yet that day, you'll see "No orders yet."

Today's sessions shows the total number of visits to your Shopify store on any given day. You will only see this card if you have an online store.

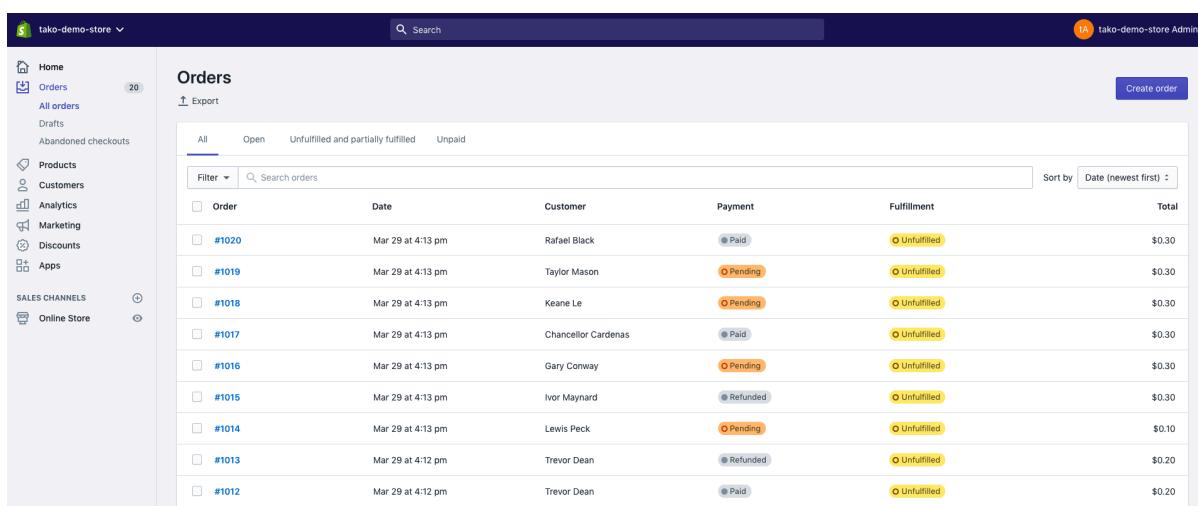
Visitors live right now shows the number of visitors who have been active on your online store in the past 5 minutes. You will only see this card if you have an online store.

Orders

All Orders

URL </admin/orders> 

After a customer places an order through your store, it appears in the Orders area of your Shopify Admin menu. You can also manually create orders for a specific customer to record orders you've taken outside of Shopify, or to send an email invoice to a customer.

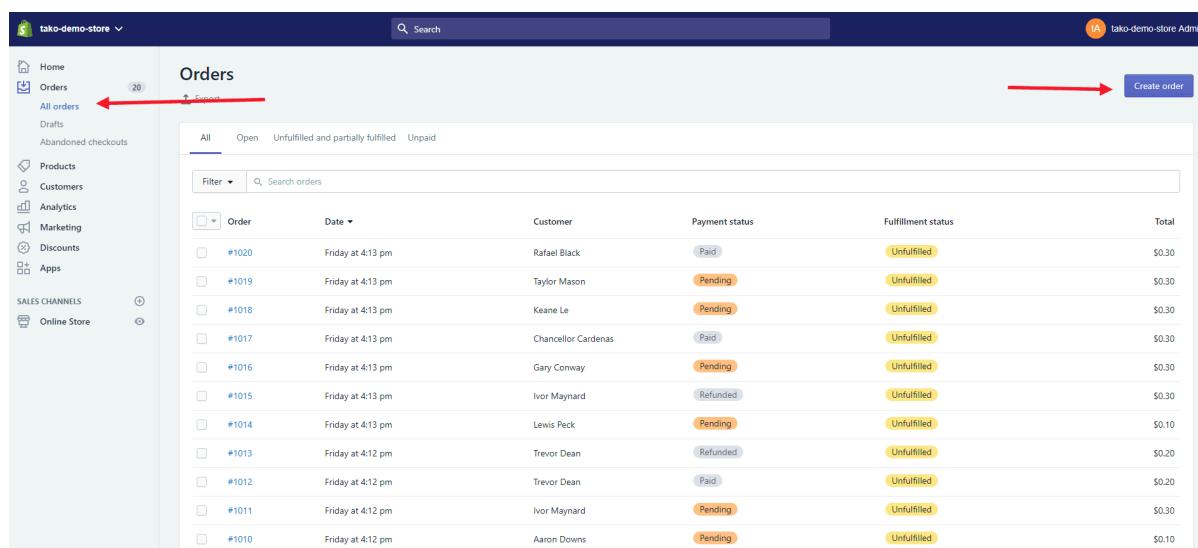


The screenshot shows the 'Orders' page in the Shopify Admin. The left sidebar includes links for Home, Orders (20), All orders, Drafts, Abandoned checkouts, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, Online Store is selected. The main content area has a header with 'Orders', a search bar, and a 'Create order' button. Below is a table with columns: Order, Date, Customer, Payment, Fulfillment, and Total. The table lists 12 orders from March 29, 2018, with various payment and fulfillment statuses and total amounts.

Order	Date	Customer	Payment	Fulfillment	Total
#1020	Mar 29 at 4:13 pm	Rafael Black	Paid	Unfulfilled	\$0.30
#1019	Mar 29 at 4:13 pm	Taylor Mason	Pending	Unfulfilled	\$0.30
#1018	Mar 29 at 4:13 pm	Keane Le	Pending	Unfulfilled	\$0.30
#1017	Mar 29 at 4:13 pm	Chancellor Cardenas	Paid	Unfulfilled	\$0.30
#1016	Mar 29 at 4:13 pm	Gary Conway	Pending	Unfulfilled	\$0.30
#1015	Mar 29 at 4:13 pm	Ivor Maynard	Refunded	Unfulfilled	\$0.30
#1014	Mar 29 at 4:13 pm	Lewis Peck	Pending	Unfulfilled	\$0.10
#1013	Mar 29 at 4:12 pm	Trevor Dean	Refunded	Unfulfilled	\$0.20
#1012	Mar 29 at 4:12 pm	Trevor Dean	Paid	Unfulfilled	\$0.20

To manually create your own orders:

1. Click on the Orders page
2. Click “Create order” in the upper right



This screenshot is identical to the one above, showing the 'Orders' page in the Shopify Admin. It features the same sidebar and table of orders. Two red arrows are overlaid: one points to the 'All orders' link in the sidebar, and another points to the 'Create order' button in the top right corner of the main content area.

3. The fields highlighted in red boxes here are the ones you need to complete.

The screenshot shows the Shopify Admin interface for creating a new order. On the left is a navigation sidebar with links like Home, Orders (20), Products, Customers, Analytics, Marketing, Discounts, Apps, and Sales Channels (Online Store). The main area is titled 'Create order'. At the top right are 'Discard' and 'Save' buttons. A yellow banner at the top says 'Some features unavailable' with a link to 'Payment settings'. The 'Order details' section contains a search bar ('Search products') and a notes input field ('Add a note...'). To the right of these are buttons for 'Add discount', 'Subtotal \$0.00', 'Add shipping', 'Taxes \$0.00', and 'Total \$0.00'. Below this are buttons for 'EMAIL INVOICE' and 'ACCEPT PAYMENT' (with options 'Mark as paid', 'Mark as pending', and 'Pay with credit card'). To the right of the order details is a sidebar titled 'Find or create a customer' with a search bar ('Search customers') and a dropdown menu showing customer profiles: Zeph Foreman, Isaiah Marquez, Chadwick Medina, Nolan Collins, Ulric Baker, and Armando Poole. A 'Create a new customer' button is also present. At the bottom right is a 'Save draft order' button.

Here you can select the appropriate customer and the products they ordered.



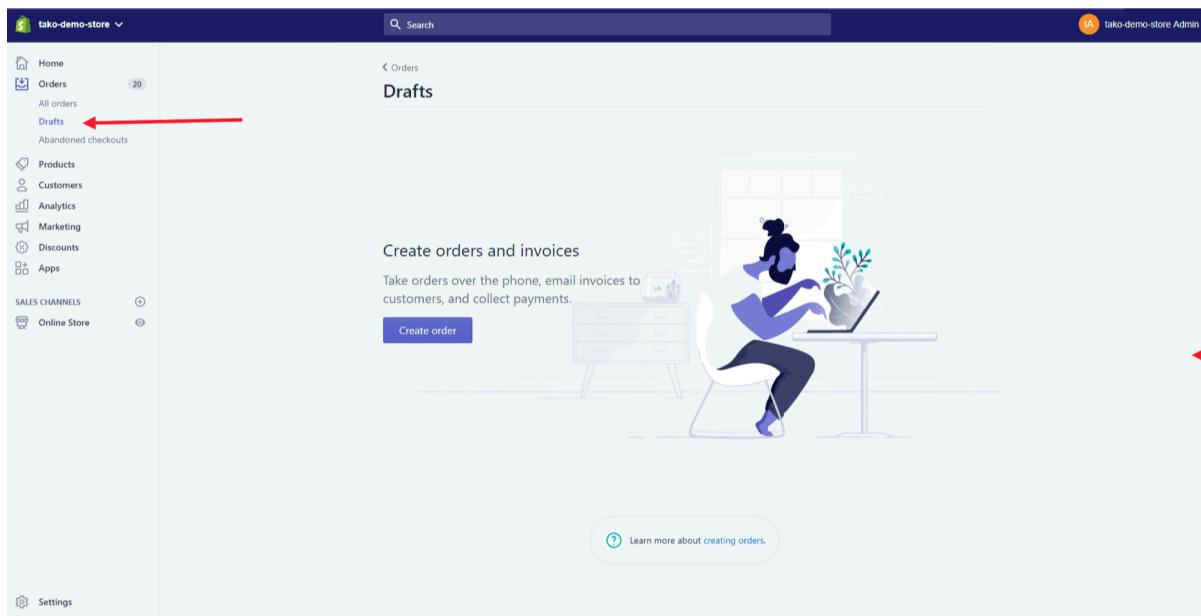
Tako Agency Pro Tip:

When you are creating an order directly from the Shopify Admin, you have the ability to add custom items that are not "products" or "services" in your store.

This screenshot is similar to the one above, showing the 'Create order' page in the Shopify Admin. The 'Order details' section and the 'Find or create a customer' sidebar are visible. A red arrow points to the 'Add custom item' button located in the 'Order details' section. The rest of the interface is identical to the first screenshot.

Drafts

URL /admin/draft_orders [🔗](#)



You can create orders for your customers and send them invoices from the Shopify admin or the Shopify app. The orders that you create on behalf of your customers are called draft orders. Draft orders are similar to the orders that your customers create for themselves. A draft order is converted to an order when you accept payment for it.

Draft orders can contain the following information:

- one or more products
- discounts on individual items or the entire order
- shipping rates
- applicable taxes
- customer information
- tags

Draft orders are useful when you need to:

- Accept payment for an order you take over the phone, in person, or elsewhere. When you accept payment for your draft order, an order is created for it on the Orders page.
- Send invoices to customers to pay with a secure checkout link.
- Use custom items to represent additional costs or products that aren't displayed in your inventory.

- Manually re-create mistaken orders from any of your active sales channels.
- Sell products at discount or wholesale rates.
- Take pre-orders.
- Save the orders as a draft and resume working on it later. If you save your order as a draft, then you can update it later from the Drafts page in your Shopify admin.



Abandoned Checkouts

URL /admin/checkouts [🔗](#)

Checkout	Date	Placed by	Email Status	Recovery Status	Total
#2895015542828	Yesterday at 5:12 am PDT	[REDACTED]	Sent	Not Recovered	\$148.75
#2890614538284	Wednesday at 5:32 pm PDT	[REDACTED]	Sent	Not Recovered	\$149.61
#2889138110500	Wednesday at 10:21 am PDT	[REDACTED]	Sent	Not Recovered	\$71.00
#2889124446252	Wednesday at 10:17 am PDT	[REDACTED]	Sent	Not Recovered	\$85.00

Not everyone who adds a product to their cart completes the checkout. When a potential customer provides their contact information and continues to the next page of the checkout--but doesn't complete the order--their cart is stored as an "abandoned checkout."

Typically, the customer will be prompted to input their email address at the beginning of the checkout process. If they don't enter their email before they abandon the checkout, then you can't send them an abandoned checkout notification. A customer account will not be created either, and items in their abandoned cart will not be saved.

As a store owner, it's important not to miss the opportunity provided by an abandoned checkout! Use email marketing to encourage customers to follow through with their purchase.

Manually email a customer a link to their abandoned checkout:

- From your Shopify admin, go to Orders > Abandoned checkouts.
- Click the checkout number you want to recover.
- Click “Send a cart recovery email.”

The screenshot shows the Shopify Admin interface for abandoned checkouts. At the top, it displays the checkout number #6496237781070 and the date Today at 4:34 pm. Below this, there's a section titled "Email your customer this link to recover their cart" with a URL https://[REDACTED]shop.myshopify.com/979058. A red arrow points to the "Send a cart recovery email" button. To the right, there's a "Customer" section showing a placeholder profile picture and the message "No orders". Below the customer info, there's a "SHIPPING ADDRESS" section with a map icon and the text "United States". The main area shows "Checkout details" for two items: "Shadow Singles" (4 units) and "Powder Blush" (3 units), along with shipping and tax information.

The screenshot shows the Shopify Admin Orders page with the "Abandoned checkouts" tab selected. It lists four recent abandoned checkouts. A red arrow points to the first entry, which has a red box around its "Checkout" column value "#2895015542828". The columns include "Checkout" (checkbox), "Date" (when abandoned), "Placed by" (redacted), "Email Status" (Sent), "Recovery Status" (Not Recovered), and "Total". Each row also has an "Export" button.



Tako Agency Pro Tip:

Make sure to pay attention to patterns you see with abandoned checkouts over time. For example, are you consistently seeing carts become abandoned as the total approaches \$150? If so, consider offering some sort of promo, giveaway, bonus item, or other benefit to incentivize customers to hit that mark.

Products

All Products

URL /admin/products 

Now it's time to add some goodies to your store so you can get selling!

To add a new product to your store:

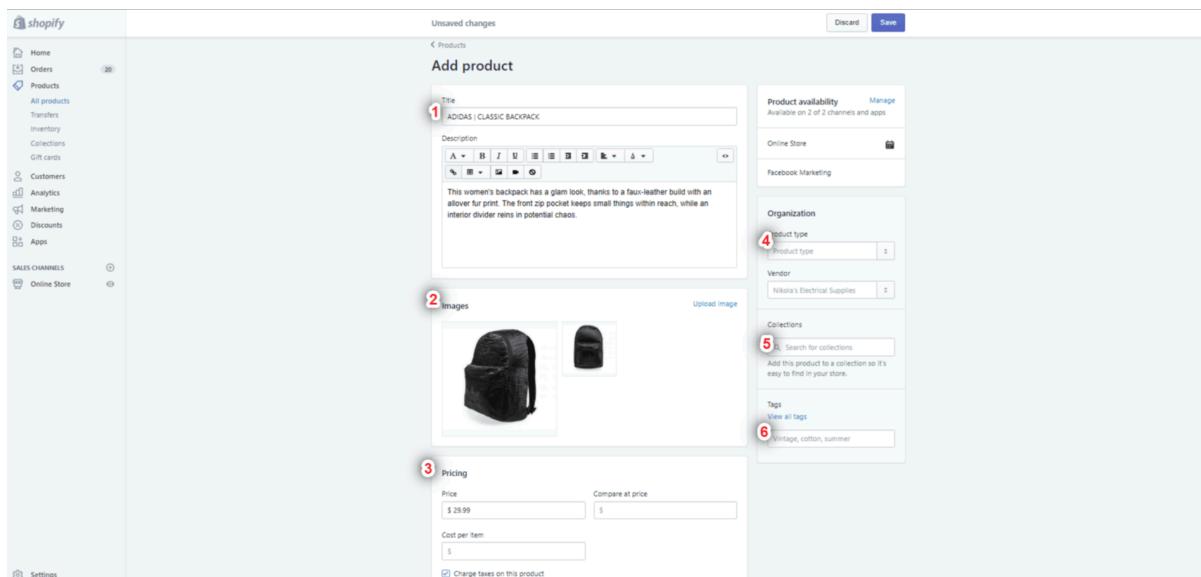
Step 1. Click on the “Products” header in the Shopify Admin menu.

Step 2. Click on the Add Product button



The screenshot shows the Shopify Admin interface under the 'Products' section. On the left, there's a sidebar with various store management links like Home, Orders, Products, Customers, etc. The main area displays a list of products with columns for Product, Inventory, Type, and Vendor. A blue 'Add product' button is located in the top right corner of the main content area, with a red arrow pointing to it.

There are 11 fields to review for each product. We've numbered them here in the screenshots to help you.



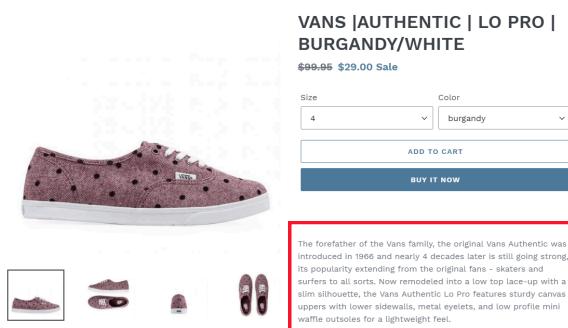
This screenshot shows the 'Add product' form in the Shopify Admin. The form is divided into several sections: 1. Title: A field containing 'ADIDAS | CLASSIC BACKPACK'. 2. Images: A section showing two thumbnail images of a backpack. 3. Pricing: Fields for Price (\$29.99), Cost per item (\$), and Charge taxes on this product. 4. Product type: A dropdown menu. 5. Collections: A search bar for collections. 6. Tags: A list of tags including 'vintage, cotton, summer'. A red arrow points to the 'Add product' button at the bottom right of the form.

The screenshot shows the Shopify Admin interface with the following steps:

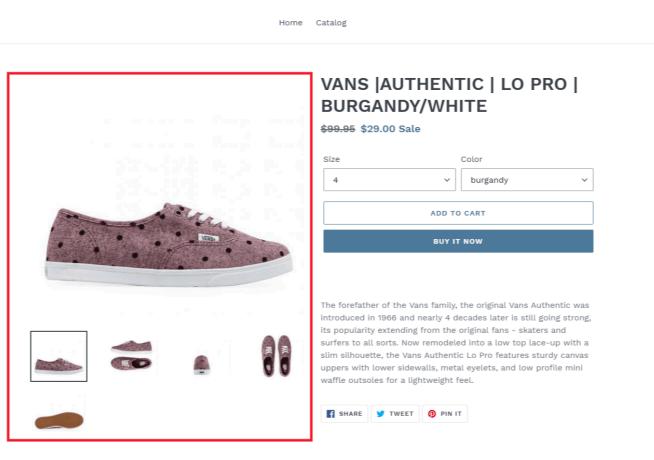
- Step 7: Pricing** (highlighted with a red circle): Shows price fields for \$29.99 and \$49.99, and a checkbox for "Charge taxes on this product".
- Step 8: Inventory** (highlighted with a red circle): Shows SKU, Barcode, Inventory policy (Shopify tracks), and Quantity (0). There's also a checkbox for "Allow customers to purchase this product when it's out of stock".
- Step 9: Shipping** (highlighted with a red circle): Shows a checkbox for "This is a physical product", weight fields (0.0 and 1.0), and customs information sections for country/region and HS code.
- Step 10: Variants** (highlighted with a red circle): Shows option names "Size" and "Color" with values "OS" and "NS" for size, and "black" and "red" for color. It also shows a table of variants with columns Variant, Price, SKU, Barcode, and Inventory.
- Step 11: Search engine listing preview** (highlighted with a red circle): Shows a preview of the product listing with the title "ADIDAS | CLASSIC BACKPACK" and a snippet about the product.

1. Product Title: (note that this title will also be used to construct the URL for the product)

2. Description: Here's your chance to describe your product in detail. This is a rich text editor, so you can include images, lists, headings, special text formatting, etc. With most Shopify themes, the description will appear near the product images and “Buy” button on the product page, as seen here.



3. Images: Now show potential customers what the product looks like! Add images by clicking “Upload Image” in the upper right corner or by dragging and dropping. In many themes, the images will be displayed as a slideshow with thumbnails



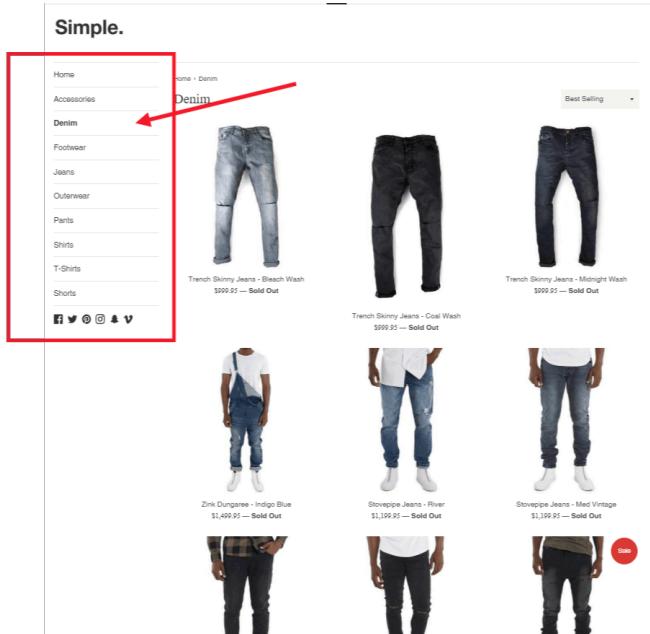
With others, images may be stacked or have features such as hover-to-zoom.

4. Organization: You can choose to organize your products by Product Type or Vendor. This section isn't customer-facing; it's only for your administrative purposes. Organizing products for a customer view will be done in the next step, “Collections.”

a. Product Type: If you have multiple types of products such as boots, hats, bags, etc, you can use this field to simplify the management of them. For example, if products are properly organized you can search for them by type in your product admin area.

b. Vendor: There are a couple of ways to use this field. If you're a reseller, you can use it to note your vendor. Otherwise, use it to note brands. Similar to Product Type, this field can be used to organize products in the admin section, and in some themes, you can display the vendor on the product page.

5. Collections: Most Shopify sites rely heavily on collections. Think of this like a product category. Products can belong to more than one collection; for example, if you're selling a pair of men's boots, they could be in the “Men's” collection AND in the “Featured” collection highlighted on the home page. Most themes come with a Collection Template, where all products in a collection are displayed in a list or grid that is sortable and filterable. Products don't have to belong to a collection, but it's a recommended practice because it makes searching for products much more user-friendly.



As you can see here, collections are listed in the left side panel and if you click on one, like “Denim,” you’ll see all the products belonging to that collection.

NOTE: Before being able to add a product to a collection, you must first create the collection itself. We’ve included more in-depth information on that a little later on, in the “Collections” section on page 16.

6. Tags: Tags are just another way to display and organize your products for your customers, and to manage your inventory in the admin area. Your customers can use tags to filter products and zero in on those they are most interested in through searches, related products, and/or filters. Tags can also be used to organize subcollections within your main collections.

7. Pricing: There are 3 fields to complete here:

Price: Current price (after sale)

Compare at price: Original price before sale

Cost per item: This is a new option that allows you to track the cost of the goods that you are selling. The customer will not see this information.

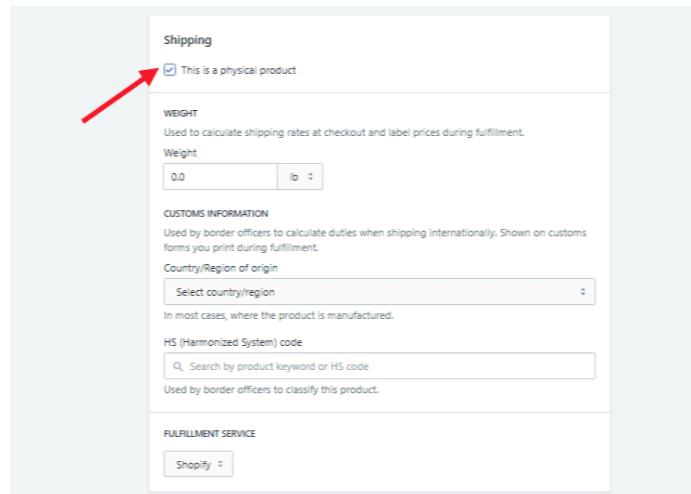
8. Inventory:

SKUs: Codes that you can use internally to track your inventory and report on your sales

Quantity: the amount of this particular product you have available

9. Shipping:

If you check the box “This is a physical product”, you must input the **Product weight**, **Country/Region of Origin**, and **HS code**.



If the product is non-physical, just uncheck the box at the top and you're done!

10. Variants:

Here you can set up variants of your product, such as size (OS or NS) or color. You can set up to 3 different variant options. After creating the variant options, just set the option values and Shopify will automatically create all possible variants in the grid below.

The screenshot shows the 'Variants' creation interface in the Shopify Admin. On the left, there's a sidebar with navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, and Online Store. The main area has tabs for 'Shopify' and 'Cancel'. It shows 'Variant' fields for 'Option name' (Size) and 'Option values' (OS, NS, S), and another for 'Color' with values black and red. Red arrows point from the text 'variant options' to the 'Size' field and from 'option values' to the OS, NS, and S buttons. Below, a table titled 'Modify the variants to be created:' lists 12 variants resulting from combinations of Size and Color. A red box highlights this table. To the right of the table, a callout box says: 'Automatically created variants by combining variant options & option values. Set Price, SKU, Barcode and Inventory for your variants.' At the bottom, there's a 'Search engine listing preview' showing a product page for 'ADIDAS CLASSIC BACKPACK'.



Tako Agency Pro Tip:

If your product line requires a complex configuration due to the number of variants or options it requires, there are many ways to customize this section further.

We have the ability to really push the envelope on the product page and how it functions, so if you need something unique - don't hesitate to ping us.

11. Search Engine Listing Preview:



Tako Agency Pro Tip:

We highly recommend focusing on this section and making sure that you have a clear URL for your product that Google can read.

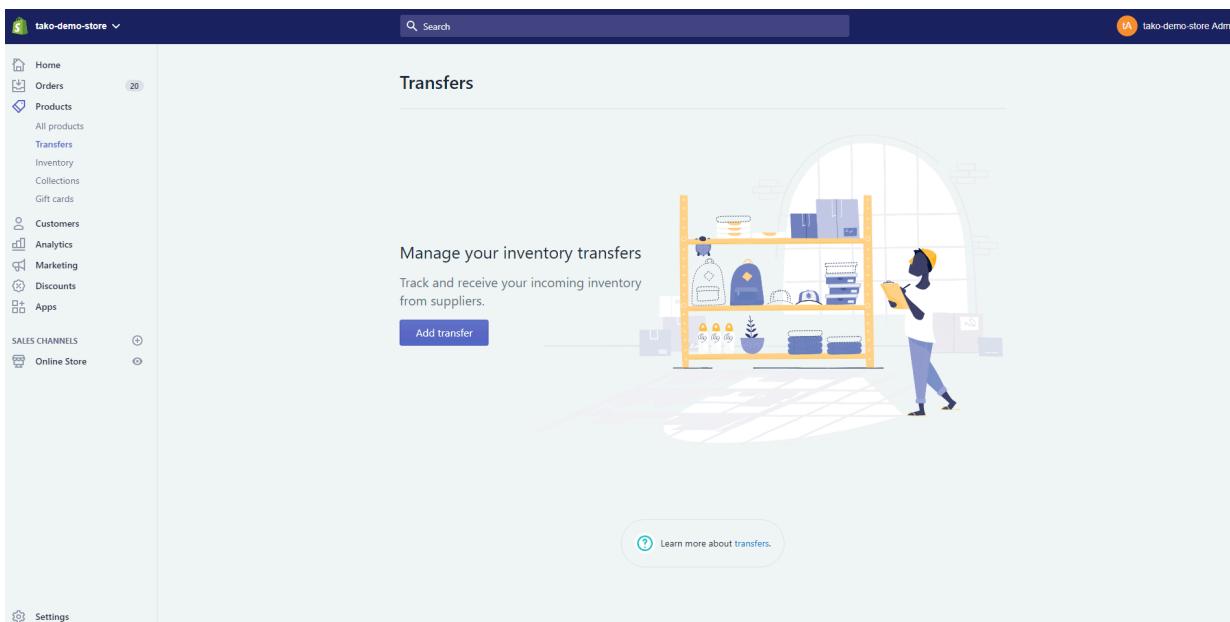
This section gives you a sneak peek for how this product page will display in Google search listings. It also previews the URL to your product, which is automatically generated by Shopify according to your product name.

If you don't like the automatically generated one, you can just edit it by clicking the link in the upper right corner. You have the power to change both the URL and the description, if you wish.

The screenshot shows the 'Variants' section of the Shopify Admin. It lists six variants for a product, each with a checkbox, a thumbnail, a size ('OS' or 'NS'), a color ('black' or 'red'), inventory count (0), price (\$29.99), and a 'Edit' button. Below this is a 'Search engine listing preview' box. The preview shows the URL 'ADIDAS | CLASSIC BACKPACK' and a snippet: 'https://tako-demo-store.myshopify.com/products/adidas-classic-backpack-1 This women's backpack has a glam look, thanks to a faux-leather build with an all-over fur print. The front zip pocket keeps small things within reach, while an interior divider reins in potential chaos.' A red arrow points from the text 'Your product url' to the URL in the preview. Another red arrow points from the text 'click this if you want to change it' to the 'Edit website SEO' button.

Transfers

URL /admin/transfers 



You can use the **Transfers** section under the “Products” menu header to track, receive, and record incoming purchase orders and inventory from suppliers.

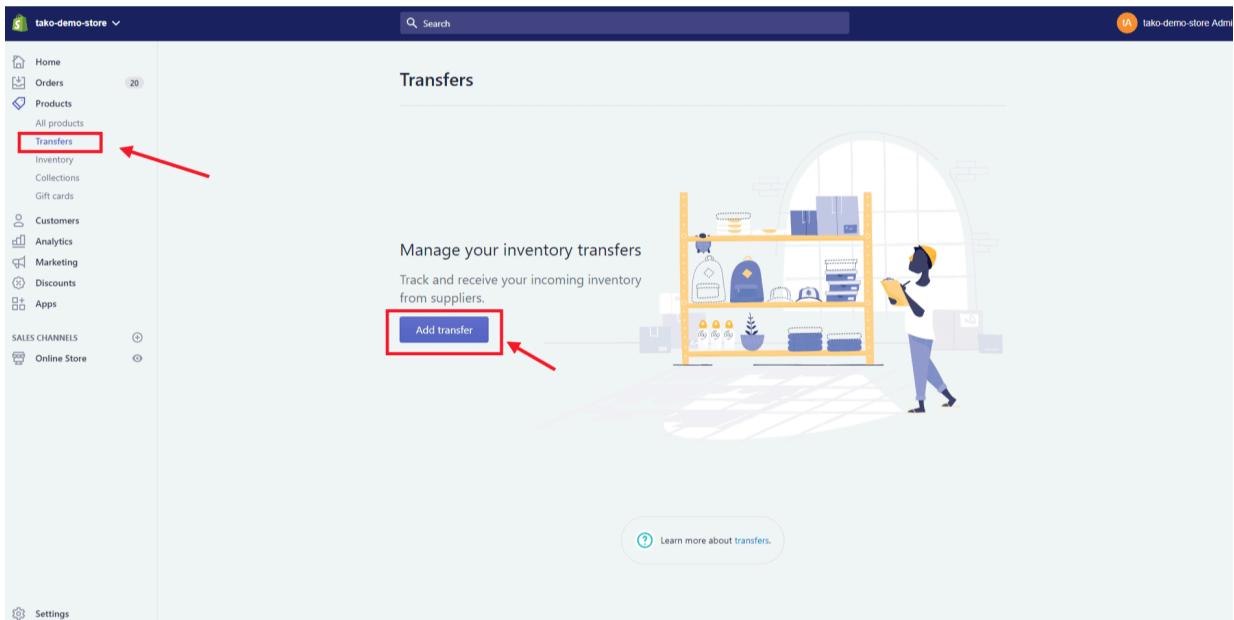
Transfers can help you to manage your purchase orders and inventory in several ways:

- You can log incoming inventory after you've submitted and confirmed your purchase order with your supplier.
- You can include whether you've received full or partial inventory, which allows you to process inventory at your own pace.
- Your product inventory is updated automatically after you received the items from your supplier.
- You can see the number of incoming items and their expected arrival date right in the products' details.

Note: You can't use transfers to move inventory between locations. You also can't create transfers for products that use a third-party fulfillment service.

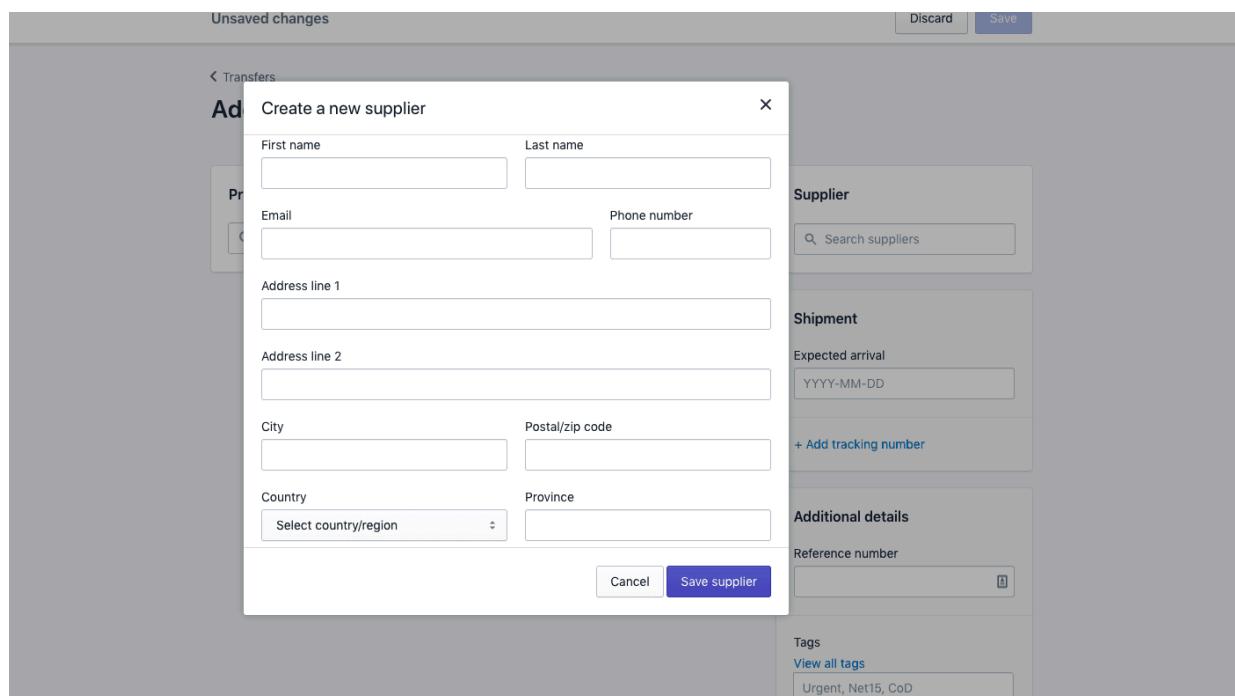
To create a Transfer:

Step 1. Click the “Add Transfer” button.



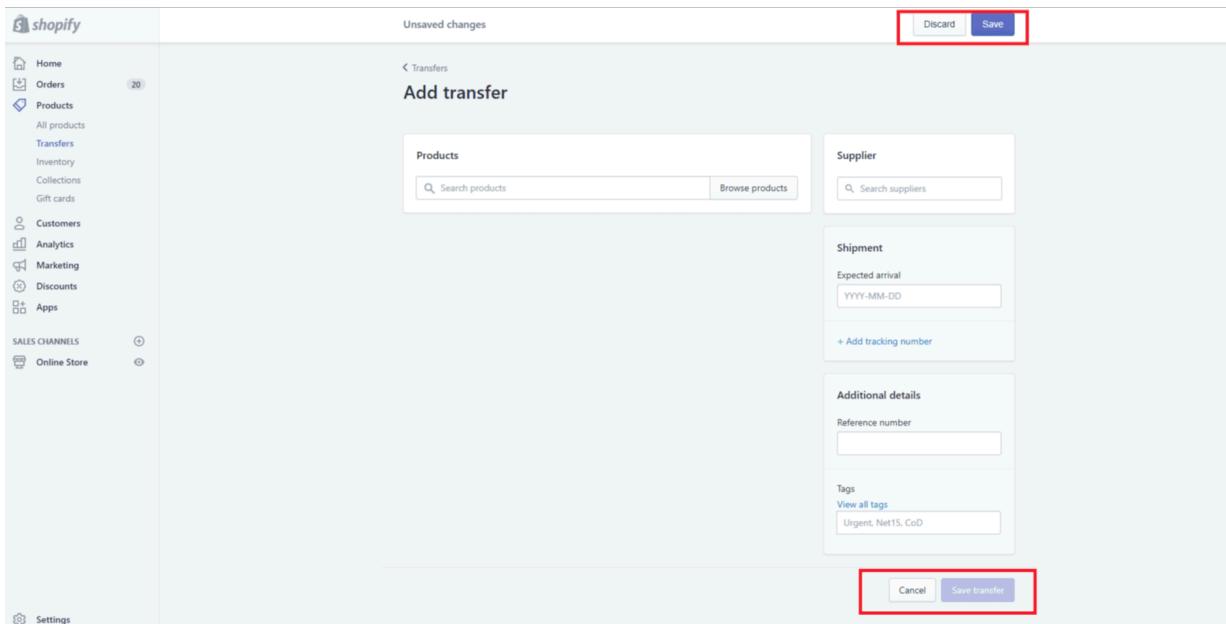
Step 2. Fill out the appropriate fields on the following page:

If you want to enter the name of your supplier, then select one in the Supplier section. You can add a **supplier** by clicking **Create new supplier** and then entering your supplier's contact and location information.



In the **Products** section, either enter the name of the product that you want to add to your transfer, or click **Browse products** to view a list of your store's products and collections.

You can save your changes either by clicking the **Save** button in the upper right or the **Save transfer** button in the lower right.



Inventory

URL /admin/products/inventory 

Your inventory is the quantity of a particular product you have available for sale; for example, if you have 30 shirts of Style X and 20 shirts of Style Y, you have 50 pieces of inventory in total but only 30 pieces of inventory of X and 20 pieces of Y available to sell.

In this section of your Shopify Admin under the “Products” menu header, you can set up inventory tracking, view your current inventory, and adjust your inventory counts. You can also check the inventory history for a particular product or variant, and export or import inventory info as a CSV file.

Inventory						
Product variant		SKU	When sold out	Incoming	Quantity	Update quantity
<input type="checkbox"/>	ASICS TIGER GEL-LYTE V '30 YEARS OF GEL' PACK 4 / black	AsTi-01-black-4	Stop selling	0	3	<input type="button" value="Add"/> <input type="button" value="Set"/> <input type="button" value="0"/> <input type="button" value="Save"/>
<input type="checkbox"/>	ASICS TIGER GEL-LYTE V '30 YEARS OF GEL' PACK 8 / black	AsTi-01-black-8	Stop selling	0	3	<input type="button" value="Add"/> <input type="button" value="Set"/> <input type="button" value="0"/> <input type="button" value="Save"/>

Collections

URL /admin/collections

The next tab under the “Product” menu is **Collections**. This is a neat Shopify feature that groups products by type and presents them as a “category” in your store. (Remember, you can organize your products by collection in the ‘Add Product’ stage, but first have to create the collection itself here.)

This screenshot shows the 'Collections' page in the Shopify Admin. The left sidebar includes links for Home, Orders, Products (with sub-options All products, Transfers, Inventory, Collections, and Gift cards), Customers (Analytics, Marketing, Discounts, Apps), Sales Channels (Online Store), and Settings. The main content area has a header 'Products' and a sub-header 'Collections'. It displays a table with columns for Title and Product conditions. The table lists nine collections: KID, WOMEN, MEN, DR MARTENS (with condition 'Product title contains DR MARTENS'), CONVERSE (with condition 'Product title contains CONVERSE'), SALE (with condition '—'), TIMBERLAND (with condition 'Product title contains TIMBERLAND'), SUPRA (with condition 'Product title contains SUPRA'), and PUMA (with condition 'Product title contains PUMA'). A blue 'Create collection' button is located in the top right corner of the table area.

Creating a new collection

Step 1. Click the “Create Collection” button at the top right corner.

This screenshot is identical to the one above, showing the 'Collections' page in the Shopify Admin. The 'Create collection' button is highlighted with a red arrow pointing to it from the bottom right. The rest of the interface, including the sidebar and the list of existing collections, remains the same.

Step 2. Fill in all the information about the collection you're creating.

Step 3: Decide how products will be added to this collection by denoting the collection type.

If its type is “Manual” you’ll need to add products to the collection one by one.

If its type is “Automatic” you can define specific conditions so that products can be automatically assigned to the correct collection.

Conditions you can use include: product title, type, vendor, price, tag, compare at price, weight, inventory stock, and variant’s title. The most frequently used condition is product tags.

The screenshot shows the Shopify Admin interface for creating a new collection. The left sidebar shows navigation links like Home, Orders, Products (with 20 items), Customers, Analytics, Marketing, Discounts, and Apps. The main area is titled 'Unsaved collection'. It includes a rich text editor, a 'Collection type' section (set to 'Automated'), a 'CONDITIONS' section with a dropdown for 'Product tag' and a value 'is equal to asics-tiger', and a 'Search engine listing preview' section. At the top right are 'Discard' and 'Save' buttons, with 'Save' being highlighted. A red box and arrow highlight the 'CONDITIONS' section.

Step 4. Click “Save” at the top.

The screenshot shows the 'Create collection' page in the Shopify Admin. The left sidebar is similar to the previous screenshot. The main area has a 'Title' input field (empty) and a 'Description (optional)' rich text editor. Below these are sections for 'Collection type' (set to 'Automated') and 'Sales channels' (listing Online Store, Wine Test, Visual & Relevant Theme Edit, FrontEndApp, and Cart & Filter App). On the right, there's a 'Collection image' section with an 'Add image' button. At the top right are 'Discard' and 'Save' buttons, with 'Save' being highlighted. A red box highlights the 'Save' button.



Tako Agency Pro Tip:

Collections (categories) inside Shopify are a dynamic feature you can customize to your needs. Maybe you want to have specific items displayed as "related products" at the bottom of a product page? You can designate a collection stocked with just those products, and take advantage of an opportunity to upsell.



Gift Cards

URL /admin/gift_cards

We're all familiar with gift cards, right? The perfect thing to give someone when you don't know what else to buy! In this section, you can add, update, and manage gift cards for your store.

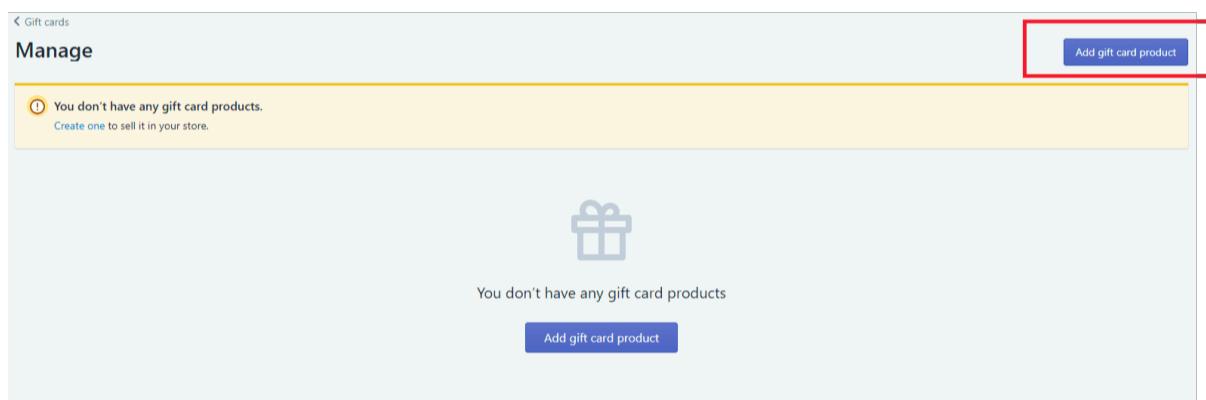
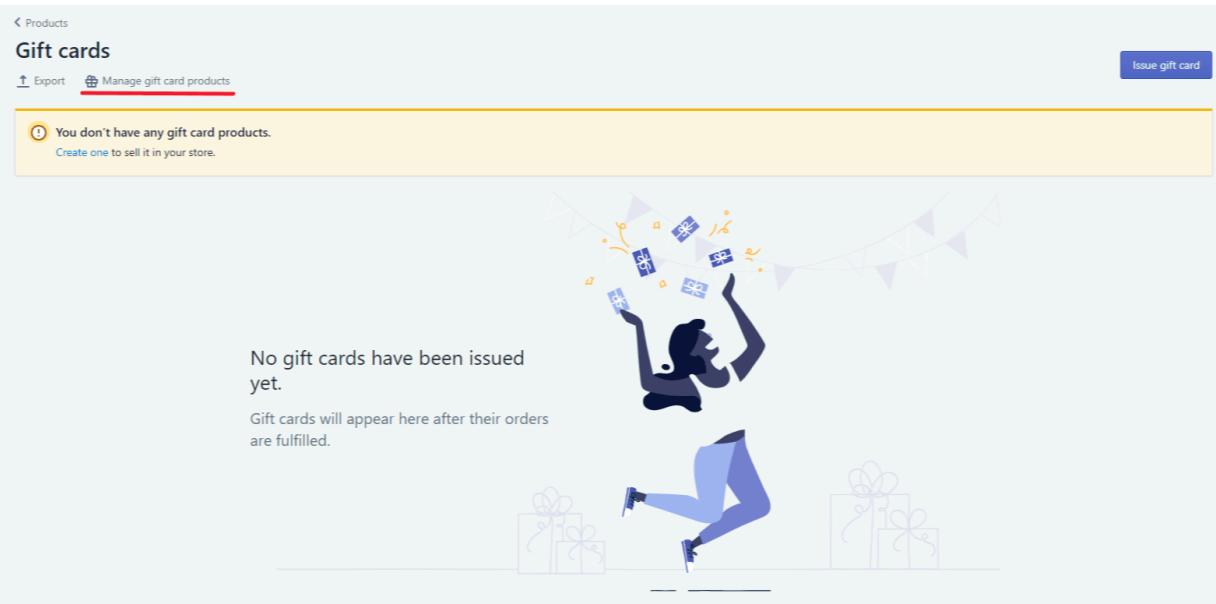
The screenshot shows the Shopify Admin interface with the following details:

- Header:** Shows the store name "tako-demo-store" and the user "tako-demo-store Admin".
- Left Sidebar:** Includes links for Home, Orders, Products (with "20" notifications), Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Online Store), and Settings.
- Current Page:** "Products > Gift cards".
- Main Content:**
 - A large heading "Sell gift cards to your customers" with a subtext: "Gift cards are a great option for people who want to buy a gift but aren't sure what to get." Below this is a "Sell gift cards" button.
 - An illustration of two people jumping joyfully among floating gift cards.
 - Three circular icons with descriptions:
 - "A gift for everyone": "Customers can buy gift cards in any amount you set from your online store."
 - "Issue unique codes": "Create gift cards with custom amounts and send them to specific customers."
 - "Instant delivery": "Customer will get an email that explains how to redeem their gift cards."

To add a gift card product:

Step 1. Click the "Sell gift cards" button.

Step 2. Click “Manage Gift Card Products” link at the top left corner and then click the purple “Add gift card product” button in the top right corner.



Step 3. Fill in the appropriate gift card information and click “**Save gift card product**” in the bottom right.

The screenshot shows the Shopify Admin interface for creating a new product. The left sidebar includes Home, Orders, Products (with sub-options like All products, Transfers, Inventory, Collections, Gift cards), Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, Online Store is selected. The main content area is titled "Add gift card product". It contains the following sections:

- Title:** Birthday gift card
- Description:** (Rich text editor)
- Product availability:** Available on 5 of 5 channels and apps.
 - Online Store
 - Wine Test
 - Visual & Relevant Theme Edit
 - FrontEndApp
 - Cart & Filter App
- Organization:**
 - Product type: Gift Card
 - Vendor: Nikola's Electrical Supplies
- Collections:** There are no collections available to add this product to. You can add a new collection or modify your existing collections.
- Tags:** Vintage, cotton, summer
- Theme templates:** Product template: product
- Search engine listing preview:** (Edit website SEO)
Add a title and description to see how this product might appear in a search engine listing.

At the bottom right, there are "Cancel" and "Save gift card product" buttons, with the "Save gift card product" button highlighted by a red box.

Tako Agency Pro Tip:

Gift cards are always a nice--and profitable--item to have in your store, and they take so little effort to set up. If you're an apparel company, you're likely to benefit from gift cards a lot more as your brand grows and people start gifting your products to each other.

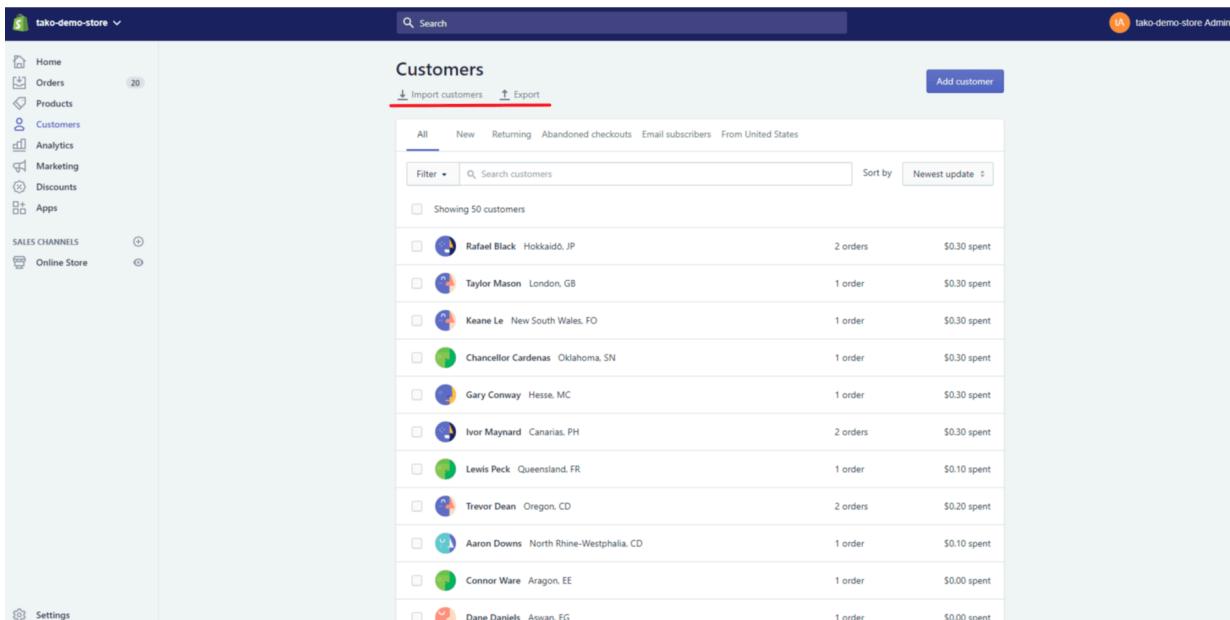
Fun fact: did you know that over \$1 Billion worth of gift cards go unused every single year?

Customers

URL /admin/customers [🔗](#)

Now that we've gotten all your products and inventory taken care of, it's time to talk about the people who're going to buy all of it--your customers! You can manage your customers in the **Customers** section of your Shopify Admin panel.

Customers will be listed here automatically when they place an order. If a customer wants to make an order outside of your store (such as in person with you) then you might need to manually create a new customer profile and generate the order that way to keep all your records together.



The screenshot shows the 'Customers' page in the Shopify Admin. At the top, there are buttons for 'Import customers' and 'Export'. Below that is a filter bar with dropdowns for 'All', 'New', 'Returning', 'Abandoned checkouts', 'Email subscribers', and 'From United States'. A search bar says 'Search customers' and a sort button says 'Sort by Newest update'. The main area lists 50 customers with columns for name, location, number of orders, and total spent. Each customer entry includes a checkbox and a small profile icon.

Name	Location	Orders	Total Spent
Rafael Black	Hokkaido, JP	2 orders	\$0.30 spent
Taylor Mason	London, GB	1 order	\$0.30 spent
Keane Le	New South Wales, FO	1 order	\$0.30 spent
Chancellor Cardenas	Oklahoma, SN	1 order	\$0.30 spent
Gary Conway	Hesse, MC	1 order	\$0.30 spent
Ivor Maynard	Canarias, PH	2 orders	\$0.30 spent
Lewis Peck	Queensland, FR	1 order	\$0.10 spent
Trevor Dean	Oregon, CD	2 orders	\$0.20 spent
Aaron Downs	North Rhine-Westphalia, CD	1 order	\$0.10 spent
Connor Ware	Aragon, EE	1 order	\$0.00 spent
Dane Daniels	Aswan, EG	1 order	\$0.00 spent

To manually create a customer:

Step 1. Click the purple “Add Customer” button in the top right corner.

Step 2. There are two main sections on the “Add Customer” page: Customer Overview and Address; both are pretty self-explanatory. Fill in the appropriate information and Click “Save.”

The screenshot shows the 'Add customer' form in the Shopify Admin. The 'Customer overview' section is visible, containing fields for First name, Last name, Email, Phone number, and two checkboxes: 'Customer accepts marketing' and 'Customer is tax exempt'. A red box highlights the 'Save' button in the top right corner.

- If the customer has agreed to receive newsletters, check the “**Customer accepts marketing**” box.
- If the customer should be exempt from all taxes, check the “**Customer is tax exempt**” box.

The screenshot shows the 'Add customer' form in the Shopify Admin. The 'Customer overview' section is visible, containing fields for First name, Last name, Email, Phone number, and two checkboxes: 'Customer accepts marketing' and 'Customer is tax exempt'. A large red box highlights the entire area containing these two checkboxes.

Analytics

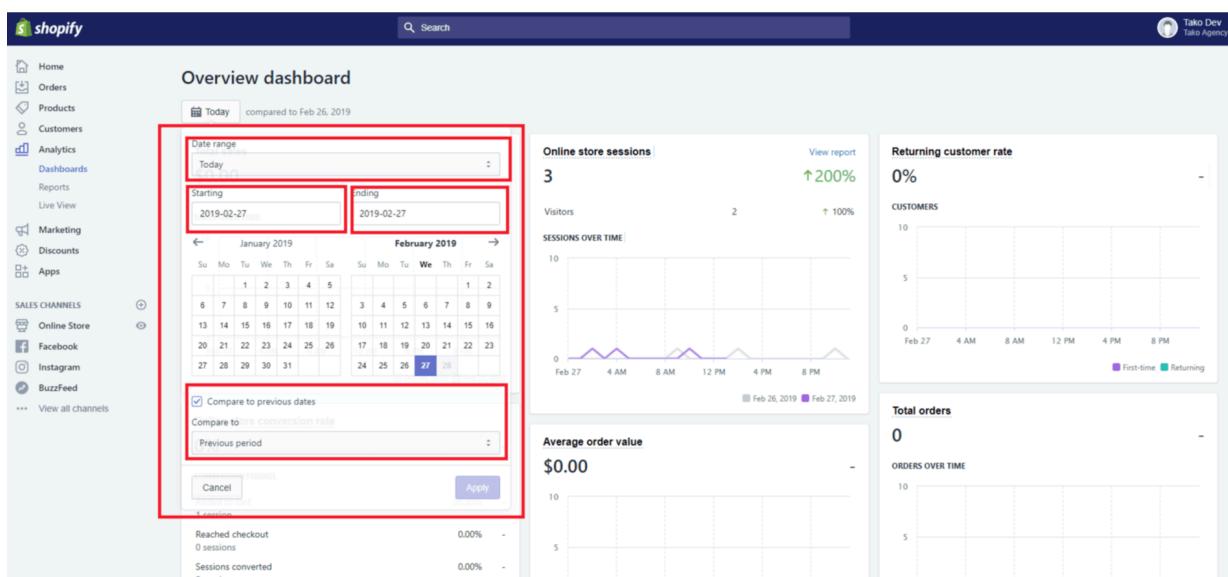
Under the “Analytics” menu header you’ll see three main areas: Dashboards, Reports, and Live view.

Dashboards

URL </admin/dashboards> 

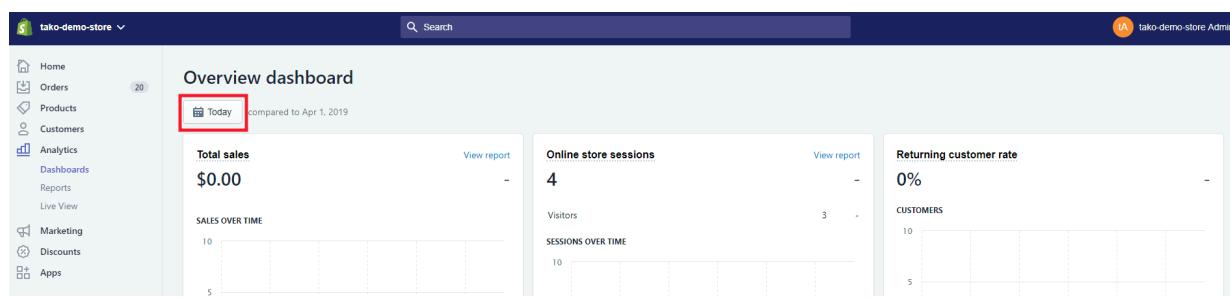
The Dashboard is exactly what it sounds like--an at-a-glance page that shows Sales, Orders, and other visitor data.

To change the date or period of time you’d like to review, just click the “Today” icon in the top left corner. You’ll see a dropdown window.



The screenshot shows the Shopify Admin Overview dashboard. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics (which is currently selected), Marketing, Sales channels, and Apps. The main area has a title "Overview dashboard" and a date range selector. The "Today" button is highlighted with a red box. Below it, there are fields for "Starting" and "Ending" dates, both set to "2019-02-27". A calendar for January and February 2019 is shown. A checkbox for "Compare to previous dates" is checked, and a dropdown menu shows "Compare to conversion rate" and "Previous period". At the bottom of the date range selector, there are "Cancel" and "Apply" buttons. To the right of the date range selector, there are several data cards: "Online store sessions" (3, up 200%), "Visitors" (2, up 100%), "SESSIONS OVER TIME" (line chart from Feb 27 to 28), "Returning customer rate" (0%), "CUSTOMERS" (line chart from Feb 26 to 27), "Total orders" (0), and "ORDERS OVER TIME" (line chart from Feb 26 to 27). Below these cards, there are sections for "Average order value" (\$0.00) and "Sales over time" (line chart from Feb 27 to 28).

That'll allow you to select a preset date range (e.g. today, yesterday, last 7 days, last month, etc.) or a custom range using the “starting date” and “ending date” features. Check the **Compare to previous dates** checkbox if you want to compare the current report to an earlier period.



This screenshot shows the same Overview dashboard as the previous one, but with a different date range. The "Today" button is still highlighted. The "Starting" and "Ending" date fields now show "2019-04-01" and "2019-04-02" respectively. The data cards reflect this new period: "Online store sessions" (4), "Visitors" (3), "SESSIONS OVER TIME" (line chart from Apr 1 to 2), "Returning customer rate" (0%), "CUSTOMERS" (line chart from Apr 1 to 2), "Total orders" (0), and "ORDERS OVER TIME" (line chart from Apr 1 to 2). The "Average order value" section also shows "\$0.00".

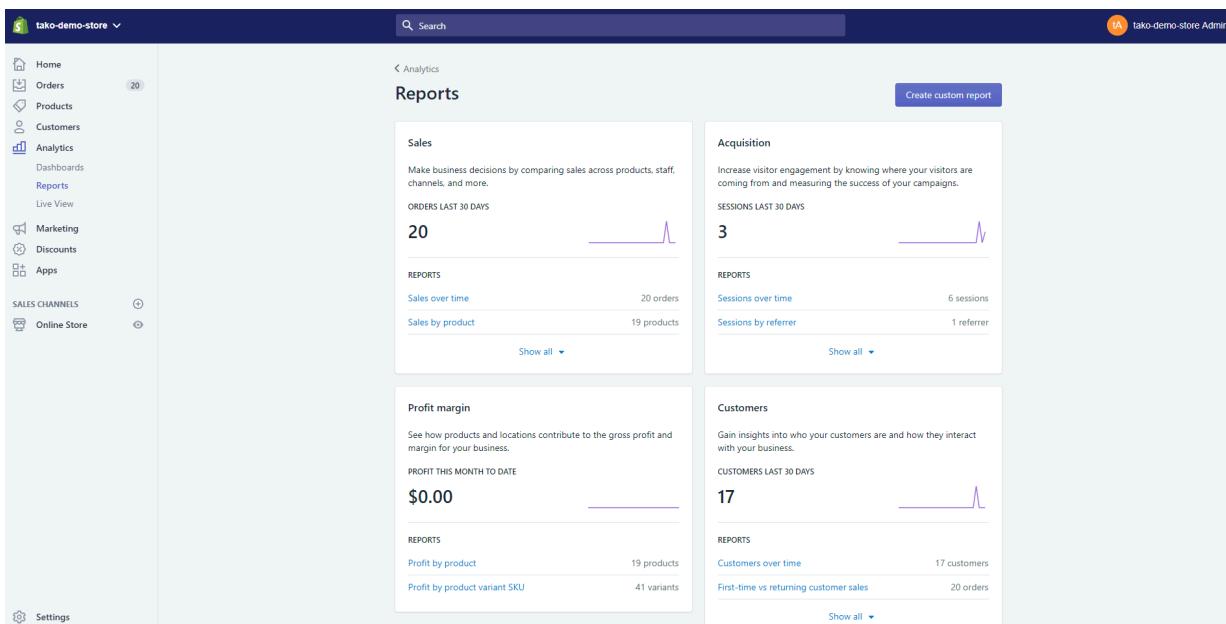
Reports

URL /admin/reports 

This page organizes various data by type. Shopify reports are divided into categories based on the kind of information that they show. The types of reports you'll be able to access will depend on your Shopify plan:

Analytics and reports (for details, click the links)	Shopify Lite	Basic Shopify	Shopify	Advanced Shopify	Shopify Plus
Overview dashboard	✓	✓	✓	✓	✓
Live View	✓	✓	✓	✓	✓
Finances reports (including taxes and payments)	✓	✓	✓	✓	✓
Acquisition reports	-	✓	✓	✓	✓
Behavior reports	-	✓ (5 of 6)	✓	✓	✓
Marketing reports	-	✓ (1 of 5)	✓	✓	✓
Sales reports	-	-	✓ (13 of 14)	✓ (13 of 14)	✓
Profit reports	-	-	✓	✓	✓
Customers reports	-	-	✓ (5 of 7)	✓	✓
Custom reports	-	-	-	✓	✓

If your plan is **Advanced Shopify** or **Shopify Plus**, you can create your custom report section here. You can have a maximum of 1000 sections.



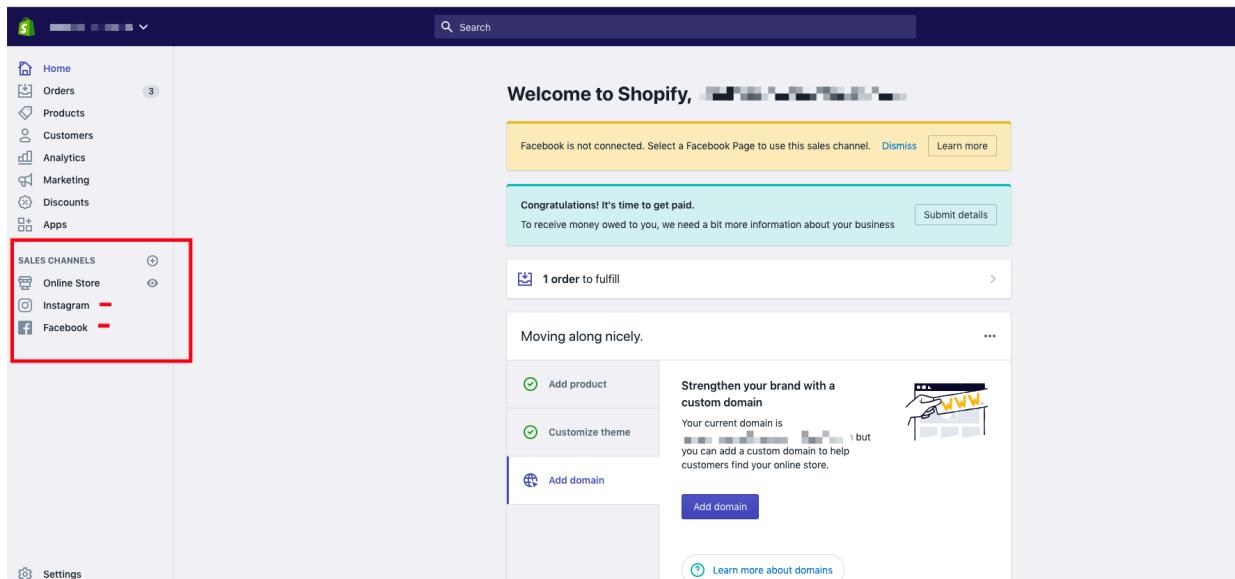
The screenshot shows the Shopify Admin interface with the Reports section selected. On the left, there's a sidebar with navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, and Online Store. The main content area displays four custom report cards:

- Sales**: Shows 20 orders last 30 days. Reports include Sales over time (20 orders) and Sales by product (19 products). A "Create custom report" button is visible.
- Acquisition**: Shows 3 sessions last 30 days. Reports include Sessions over time (6 sessions) and Sessions by referrer (1 referrer).
- Profit margin**: Shows \$0.00 profit this month to date. Reports include Profit by product (19 products) and Profit by product variant SKU (41 variants).
- Customers**: Shows 17 customers last 30 days. Reports include Customers over time (17 customers) and First-time vs returning customer sales (20 orders).

Live View

URL /admin/dashboards/live 

When you use an online store channel,



the Live View page gives you a neat real-time view of the activity happening on your site. There is a map to show where the action is coming from and some key metrics to let you know what's happening right now.

Information shown in Live View:

- Visitors right now

Number of visitors who have been active on your online store in the past 5 minutes.

- Today's totals

Total number of sessions and orders for today, as well as the total sales for today.

- Current behavior on your store

Number of visitors to your online store in the last 10 minutes that have added items to their cart, reached the checkout, or made purchases.

- Real-time pageviews

Number of pages of your online store that were viewed by visitors over the past 10 minutes.

The screenshot shows the Shopify Admin Home dashboard. On the left, there's a sidebar with navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, and Online Store. The main area features a "Live View" section with a world map showing visitor locations. Key metrics displayed include "VISITORS RIGHT NOW" (0), "TODAY'S TOTALS" (4 Sessions, 0 Orders, \$0 Sales), and "Customer behavior on your store" (0 Active carts, 0 Checking out, 0 Purchased). Below this is a "Real-time pageviews per minute" chart showing activity over the last 10 minutes.

Marketing

URL </admin/marketing>

The screenshot shows the Shopify Admin Marketing section. The sidebar includes links for Home, Orders, Products, Customers, Analytics, Marketing (which is highlighted in blue), Discounts, Apps, Sales Channels, and Online Store. The main content area is titled "Marketing" and features a "Promote your products" section with a description: "Choose a campaign goal or event, select a marketing activity, and track the results from within Shopify." It includes a "Create campaign" button and a visual representation of a marketing funnel with icons for Google, Facebook, and email. A callout box at the bottom right says, "Learn more about marketing campaigns and how Shopify syncs report data."

Next up in your Shopify admin menu is the “Marketing” section. As a business owner, you already know that marketing is going to be a critical component to your success. It doesn’t matter how good your product or service is; if no one knows about it, they can’t buy it! A great marketing plan will increase traffic to your store and convert visitors into customers.

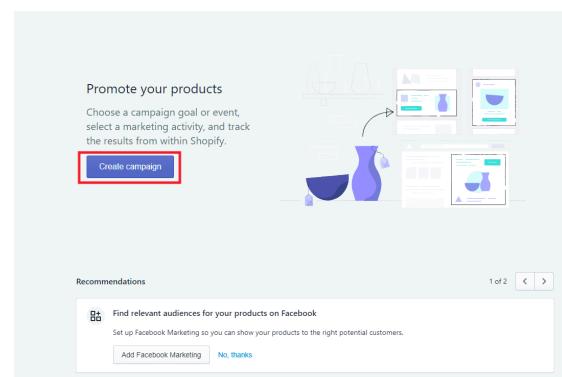
With Shopify (on the Basic Shopify plan or higher), you don't have to go it alone. There are some great built-in marketing campaigns right at your fingertips! Here's where you begin.

One of the most commonly used marketing campaigns involves advertising through Google Ads, Facebook Ads, Instagram Ads, and/or Pinterest Promoted Pins. You can create marketing campaigns for Google and Facebook on this Marketing page.

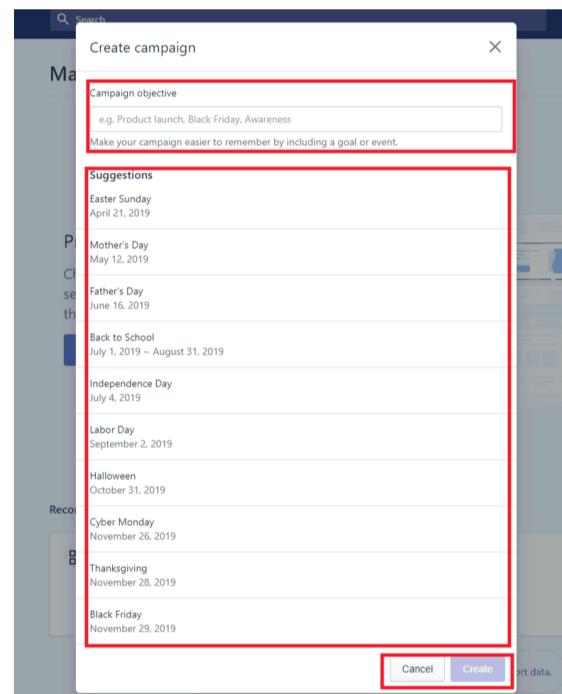
To create a marketing campaign:

You need to have a marketing app installed and be on the Basic Shopify plan or higher to create marketing campaigns and activities.

Step 1. Click the “Create Campaign” button.



Step 2. Input your Campaign Objective (what the marketing plan is centered around--a goal or event, usually) or choose one from the Suggestions List and click “Create.”



After you create a new campaign you'll see this page, which is essentially your campaign dashboard. Here you can link Facebook marketing and Google Shopping elements by following the prompts to connect your respective accounts.

The screenshot shows the Shopify Admin interface with a sidebar on the left containing links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, it lists Facebook, Point of Sale, Messenger, and Mobile App Creator. A red box highlights the Marketing section where a campaign named 'Easter Sunday' is listed. Below it, there's a 'Select activity' section with options for 'Facebook Marketing campaign' and 'Google Shopping campaign'. A message at the bottom states 'You haven't created any activities yet.'



Tako Agency Pro Tip:

This feature is something new that Shopify recently released, and it's extremely useful to have this directly inside your Shopify admin. If you're not a "marketing guru" yet this feature can get you kicked off with ad spending and tracking your ROI.

Discounts

URL </admin/discounts/new> ➡

Offering a discount is often a great way to entice people to your website when you first launch or unveil new products.

Shopify has done a great job with making this as straightforward as possible, so there isn't much to explain here! Each section is organized logically to guide you through the process, from generating or naming the code to specifying restrictions.

Create discount code

Discount code

DISCOUNT TEST

Customers will enter this discount code at checkout.

Options

Discount type

- ✓ Percentage
- Fixed amount**
- Free shipping
- Buy X Get Y

Applies to

- Entire order** (selected)
- Specific collections
- Specific products

Minimum requirement

- None** (selected)
- Minimum purchase amount
- Minimum quantity of items

Summary

DISCOUNT TEST

PERFORMANCE

Discount is not active yet.

CAN'T COMBINE WITH OTHER AUTOMATIC DISCOUNTS

Customers won't be able to enter a code if an automatic discount is already applied at checkout.

At the bottom of the discounts page, you will also have the ability to set date parameters for a specific discount. Start and end dates are perfect for running a promo for a specific amount of time, like holidays.

Minimum requirement

- None** (selected)
- Minimum purchase amount
- Minimum quantity of items

Customer eligibility

- Everyone** (selected)
- Specific groups of customers
- Specific customers

Usage limits

- Limit number of times this discount can be used in total
- Limit to one use per customer

Active dates

Start date

2019-01-25

Start time (EST)

Enter time

Set end date

Summary

DISCOUNT TEST

PERFORMANCE

Discount is not active yet.

CAN'T COMBINE WITH OTHER AUTOMATIC DISCOUNTS

Customers won't be able to enter a code if an automatic discount is already applied at checkout.



Tako Agency Pro Tip:

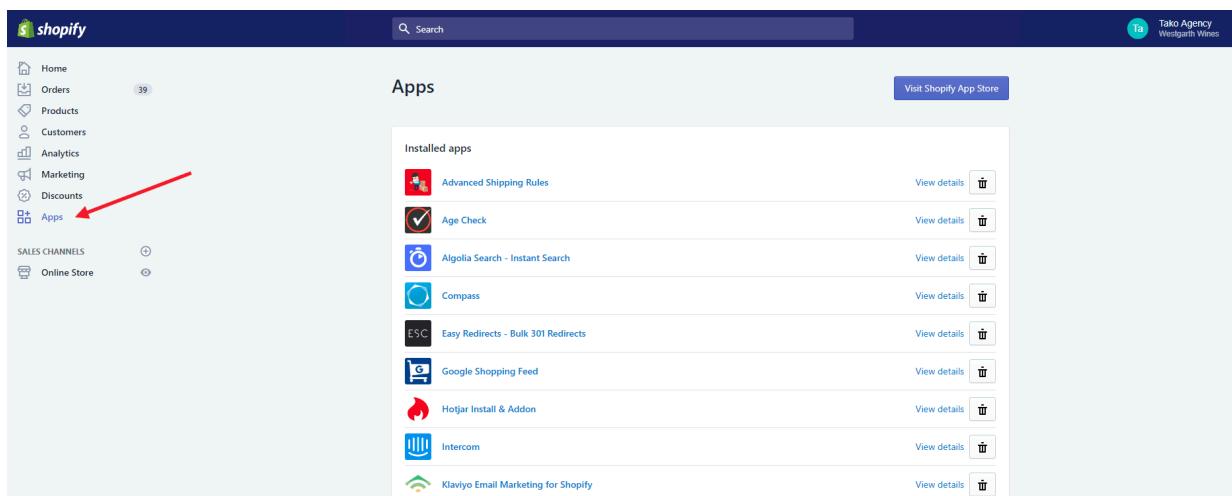
Discounts are a great way to bring people to your site. Deals like free shipping, buy one get one free, and so on are all great promotions to incentivize your customers to shop. When setting up your coupons, you have the option to directly share a link to any social outlet or email. When someone clicks on it, the coupon code will be automatically applied at checkout. This seamless integration provides a smooth user experience and avoids the hassle of manually typing in a code at checkout.

Apps

URL /admin/apps 

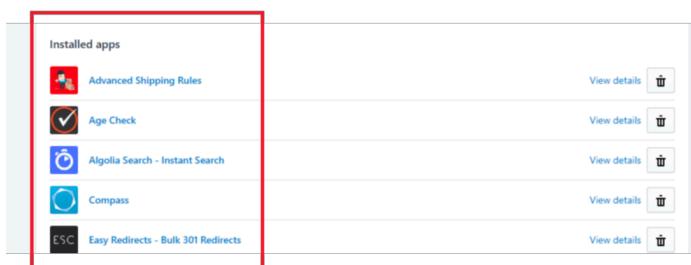
Shopify apps can help you fine-tune your business operations, integrate with external services, and add features to your Shopify admin. You can find them in the Shopify App Store. <https://app.shopify.com>

In the “Apps” section of your Shopify Admin panel, you’ll see a list of all the apps you’ve installed onto your store and can configure the appropriate settings. If you find you’re missing something, click the “Visit Shopify App Store” button in the upper right to check out new apps.



The screenshot shows the Shopify Admin interface with the sidebar menu open. The 'Apps' option is highlighted with a red arrow. The main content area is titled 'Apps' and shows a list of 'Installed apps'. Each app entry includes the app icon, name, a 'View details' link, and a trash can icon for uninstalling. The apps listed are: Advanced Shipping Rules, Age Check, Algolia Search - Instant Search, Compass, Easy Redirects - Bulk 301 Redirects, Google Shopping Feed, Hotjar Install & Addon, Intercom, and Klaviyo Email Marketing for Shopify.

To manage an app, just click on it and the app configuration page will open.



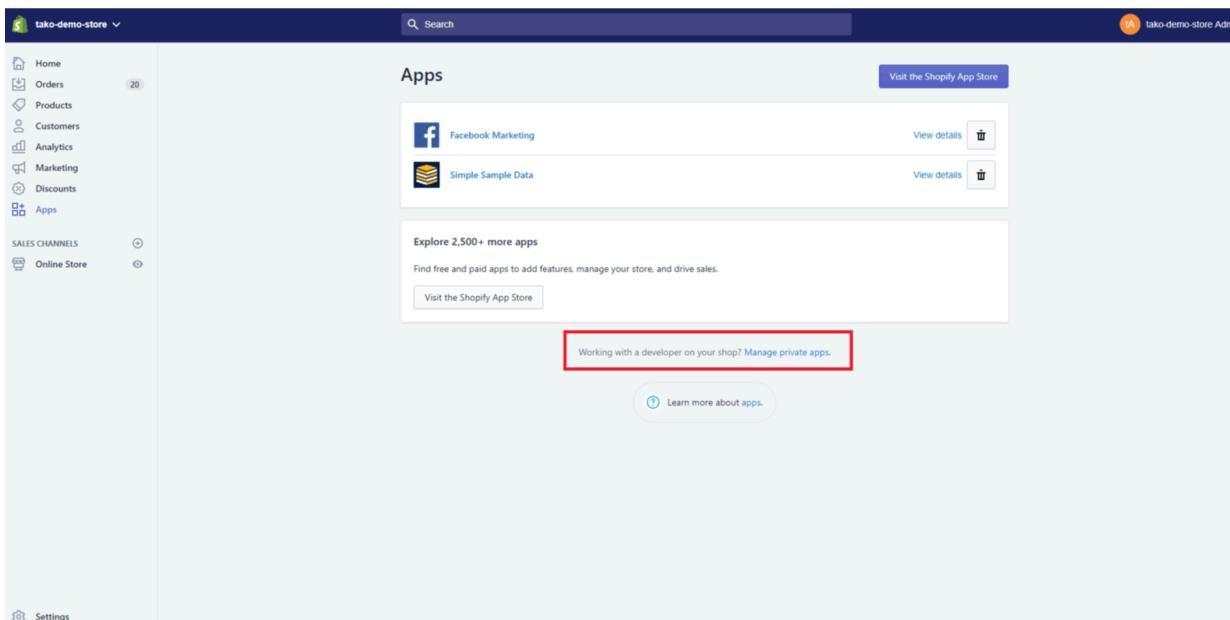
This screenshot is identical to the one above, showing the list of installed apps. A red box highlights the entire list of apps, indicating the target for the 'View details' action described in the accompanying text.

To view the details, click “View details” link.



This screenshot shows the same list of installed apps. A red arrow points specifically to the 'View details' link next to the 'Age Check' app entry, guiding the user to click on it to view more information.

You can also use private apps to add features to your Shopify store, access your store's data directly using Shopify's APIs, or extend your online store to other platforms using custom storefronts.



Private apps can help you:

- Build an importer to migrate your data from Magento or another provider to Shopify.
 - Integrate your store's data with a custom solution you're using to manage orders, products, or inventory outside of Shopify.
 - Offer products from your Shopify store on a custom storefront, like a mobile app, website, or video game.
- If your store is on the trial plan, you're limited to creating five private apps. Otherwise, you can create as many private apps as you need.



Tako Agency Pro Tip:

There is an abundance of apps in the Shopify App Store that can help you be more successful with your business in many ways.

Some of the most common examples are:

- Custom product configurations
- Cart page features (such as suggesting related items for upselling).
- Post-purchase share links so that your customers can share their purchase via social media

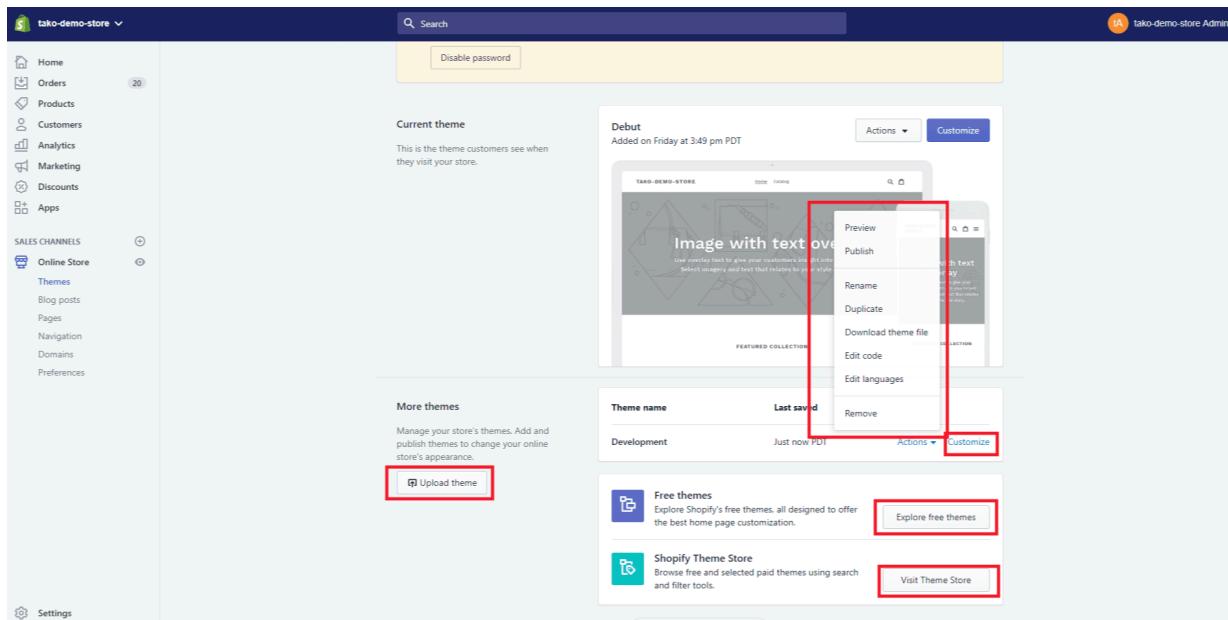
And more. Take some time to browse around and see what's right for you!

Online Store

Themes

URL /admin/themes 

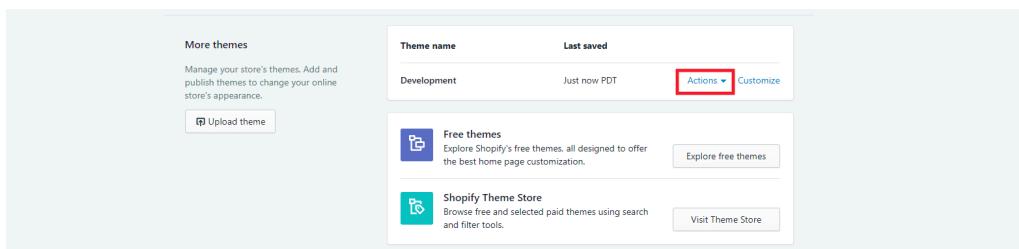
In the “Themes” section, you can upload, import, customize, preview, and edit your store’s themes. Your theme is the digital layout of your store and the site, and dictates much of the brand appearance.



The screenshot shows the Shopify Admin interface for managing themes. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, it shows Online Store with sub-links for Themes, Blog posts, Pages, Navigation, Domains, and Preferences. The main content area has a header "tako-demo-store Admin". Below the header, there's a search bar and a "Disable password" button. The "Current theme" section displays a preview of the "Debut" theme, which features a dark background with a grid of products and text overlays. A context menu is open over this preview, with options like Preview, Publish, Rename, Duplicate, Download theme file, Edit code, Edit languages, and Remove. The "More themes" section lists a theme named "Development" last saved "Just now PDT". It includes a "Actions" dropdown and a "Customize" button. Below this, there are sections for "Free themes" and "Shopify Theme Store", each with their own "Explore free themes" and "Visit Theme Store" buttons. Red boxes highlight the "Actions" dropdown in the current theme preview, the "Actions" dropdown in the more themes list, and the "Explore free themes" and "Visit Theme Store" buttons.

Here you can see two main sections: **Current theme** and **More themes**

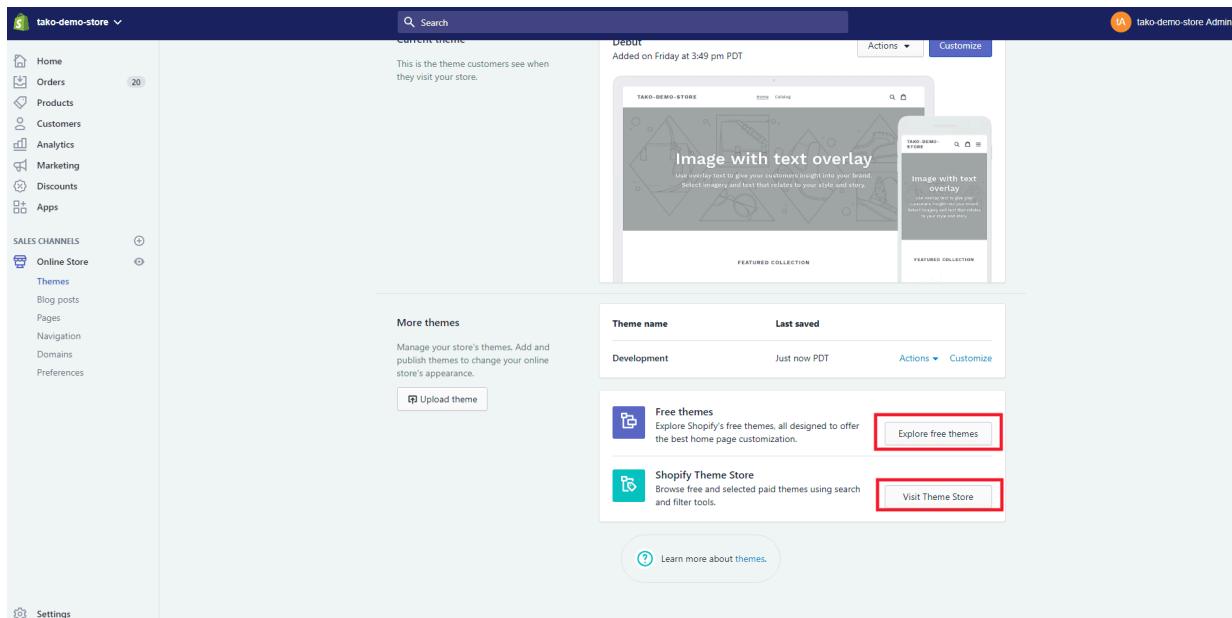
- **Current theme:** This is the theme that is currently set on “live mode” and is what customers will see when they visit your store. You can directly customize your current theme, but it is not recommended because all changes should be tested before going live.
- **More themes:** Themes listed here are not live; they may be in development or older ones you’ve used before. To publish a theme in development, open the blue Actions dropdown and click Publish.



This is a zoomed-in view of the "More themes" section from the previous screenshot. It shows a theme named "Development" last saved "Just now PDT". A red box highlights the "Actions" dropdown button, which is part of a larger "Actions" & "Customize" button. Below this, there are sections for "Free themes" and "Shopify Theme Store", each with their own "Explore free themes" and "Visit Theme Store" buttons.

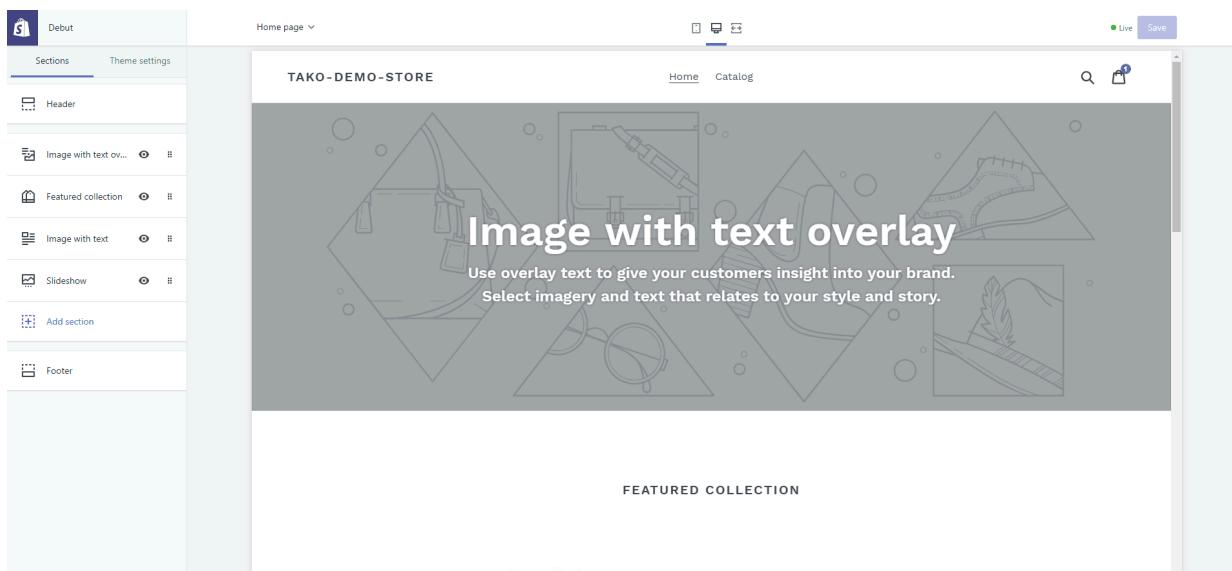
Purchasing a new theme

At the bottom of the themes page, you'll see links to free and purchasable themes. Browse free themes by clicking **Explore free themes** or review more advanced themes available for purchase by clicking **Visit Theme Store**.



Customizing your theme

To customize your theme, choose the theme to customize and click the blue “Customize” link. To make changes to your current theme, click the purple “Customize” button at the top right corner. The Customizer Page will open, and you’ll have the option to customize various elements of the theme. How much you’ll actually be able to customize will depend on the theme.



Blog Posts

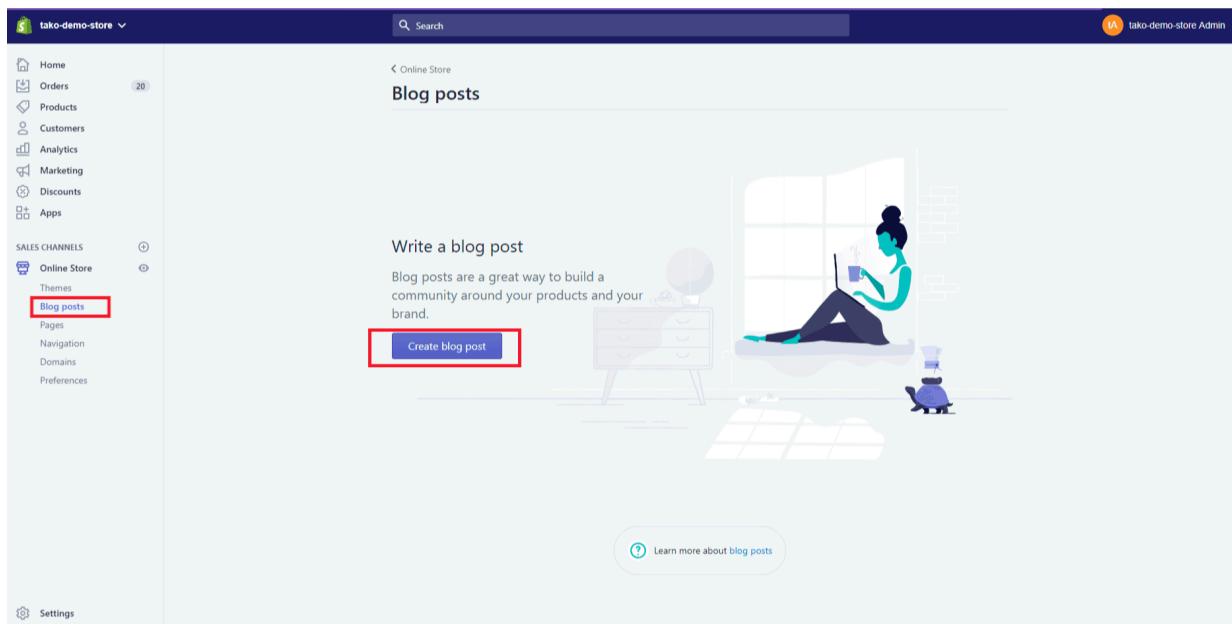
URL /admin/articles

Blog posts are a great way to build a community around your products and your brand. They're also fantastic SEO tools. Your posts can contain both text and images. You can choose to publish a post immediately, or set a specific publishing date in the future.

To create a blog post:

Step 1. From your Shopify admin, go to Online Store > Blog Posts.

Step 2. Click **Create blog post**



1. Title: You need to have a title to save the post.

2. Content: Enter the blog post content. This field uses the rich text editor, so you can format text, add images, embed video or other media, or insert a link.

3. Choose the settings for your blog post:

Author: From the dropdown menu, select the name of the person writing the post. Only the names of the account owner and staff members appear in the dropdown menu.

Blog: Select the name of the blog where the post will be published. If you don't want to publish to one of your existing blogs, then you can create a new blog in the dropdown menu.



Tako Agency Pro Tip:

You can create multiple blogs to organize content based on category or audience. For example, you can have one blog for new product announcements, another for tips & tutorials, another for customer stories, etc.

4: Blog posts are hidden by default and won't appear on your site you're ready to publish the post, at which time you can select **Visible** in the **Visibility** section.

5: Click “Save”.

The screenshot shows the Shopify Admin interface for creating a new blog post. The left sidebar includes links for Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Online Store, Themes, Blog posts), Pages, Navigation, Domains, and Preferences. The main area is titled "Blog posts" and shows a single post with the following details:

- Title:** Au Lit Fine Linens
- Content:** Au Lit Fine Linens sells everything to help you get a good, relaxing night's sleep: luxury sheets, bath lines, pillows, and more.
- Excerpt:** Add a summary of the post to appear on your home page or blog.
- Search engine listing preview:** Au Lit Fine Linens
http://tako-demo-store.myshopify.com/blogs/news/au-lit-fine-linens
Au Lit Fine Linens sells everything to help you get a good, relaxing night's sleep: luxury sheets, bath lines, pillows, and more.
- Visibility:** Hidden (radio button selected)
- Featured image:** A placeholder image of a folded sheet.
- Organization:**
 - Author:** tako-demo-store Admin
 - Blog:** News

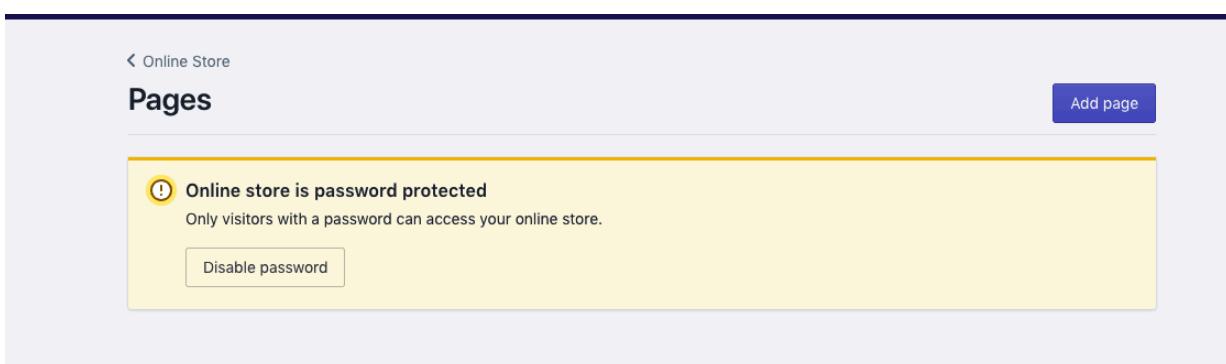
Pages

URL /admin/pages 

Here you can manage all the pages of your store and add new ones.

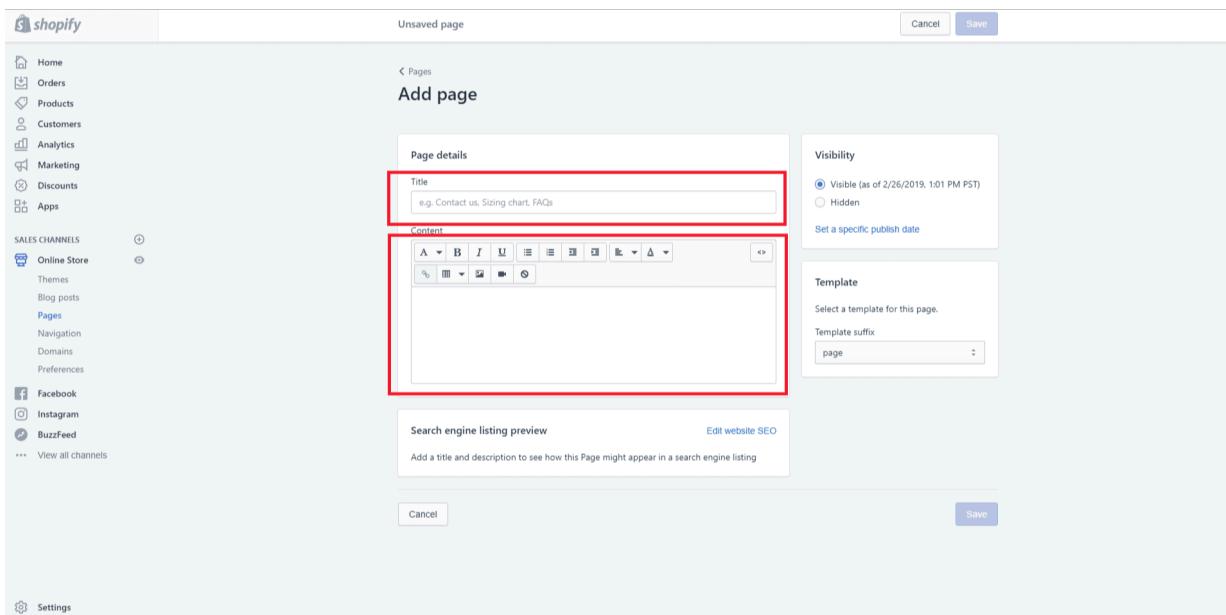
To add a Page:

Step 1. Click on the purple “Add Page” button.



The screenshot shows the 'Pages' section of the Shopify admin. At the top, there's a yellow banner with a warning icon and the text: "Online store is password protected. Only visitors with a password can access your online store." Below the banner is a "Disable password" button. In the top right corner of the main area, there's a blue "Add page" button.

Step 2. Complete the following fields:



The screenshot shows the "Add page" form in the Shopify admin. The left sidebar has a "Pages" section selected. The main form has the following fields:

- Page details:** A "Title" input field containing "e.g. Contact us, Sizing chart, FAQs" and a rich text editor below it. Both are highlighted with a red box.
- Visibility:** Radio buttons for "Visible (as of 2/26/2019, 101 PM PST)" (selected) and "Hidden". There's also a link to "Set a specific publish date".
- Template:** A dropdown menu labeled "Select a template for this page." with "page" selected.
- Search engine listing preview:** A section with a "Cancel" button and a "Save" button.

- 1. Title:** This should be a relevant title so that the page is easy to find in the Admin section; ex: Home, FAQs, etc.

The title you choose will be used as the default for the Search Engine page title, see here:

The screenshot shows the 'Page details' section of the Shopify Admin. On the left, there's a 'Page details' panel with a 'Title' input field containing 'e.g. Contact us, Sizing chart, FAQs'. This field is highlighted with a red box. Below it is a 'Content' editor with various rich-text tools. To the right, there's a 'Visibility' section with radio buttons for 'Visible (as of 2019-01-25 3:03pm EST)' (selected) and 'Hidden', and a link to 'Set a specific publish date'. Further down, there's a 'Template' section with a dropdown for 'Template suffix' set to 'page'. On the far left, under 'Search engine listing preview', there's a note to 'Add a title and description to see how this page might appear in a search engine listing.' Below this are fields for 'Page title' (empty, 0 of 70 characters used), 'Meta description' (empty, 0 of 320 characters used), and 'URL and handle' (set to 'https://kkauto-live.myshopify.com/pages/').

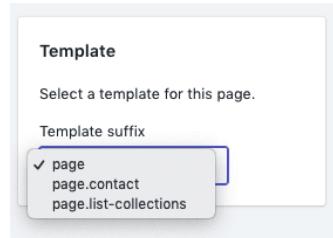
However, you aren't forced to use the default and can change it to something else in the "Search engine listing preview" section further down the page.

2. Content: Depending on what you want on this page, it's pretty simple to add content like text, images, videos, links, and so on.

If you are planning on doing some custom work (such as linking URLs, showing images by link, etc.) to this page, it should be done through the template code base.

3. Visibility: Allows you to decide if you're ready to publish this page and let it go live on your site, or if you'd like it to remain hidden for now. You can also program a specific publish date in the future, which is helpful if you're creating a promo landing page for a specific launch, for example.

4. Template: Depending on which theme you are starting with, there might be different options displayed here. Look at this as the section where you can use a template from one of your other pages (contact page, landing page, etc.) to create a new page with the same layout.



Further down the page, you'll encounter the search engine listing preview section.

A screenshot of the Shopify Admin 'Search Engine Listing Preview' section. It shows three input fields: 'Page title' (Request Personal Data), 'Description' (a privacy policy snippet), and 'URL and handle' (https://takoagency.com/request-personal-data). Each field is highlighted with a red border. At the bottom are 'Delete page' and 'Save' buttons.

Page Title: Choose something that's search friendly and describes the page in 1-3 words. This will factor into your site's Search Engine Optimization.

Meta Description: Make sure that you are only adding relevant search related info. It should be easy to read, friendly text. Use keywords that describe the page and the website overall.

URL and Handle: This should be 1-3 words related to the page, preferably a keyword from your page and/or website.

And finally... you can click the purple "Save" button in the bottom right. Once you save it, the page will refresh and you can click on "View Page" right at the top of the screen, to see what it looks like.



Notice that there is also a DUPLICATE button there. This just means that you can create an exact copy of this page, which is helpful when you're creating multiple similar pages.

Navigation

URL /admin/menus

Here you can manage the menus that appear on your store. Your online store has two default menus that appear on every page: the main menu and footer menu.

The screenshot shows the Shopify Admin interface with the URL `/admin/menus` at the top. On the left, there's a sidebar with various store management options like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, Themes, Blog posts, Pages, and Navigation. A red arrow points to the 'Navigation' link in the Pages section. The main content area is titled 'Navigation' and shows two tables: 'Footer menu' containing 'Search' and 'Main menu' containing 'Home, Catalog'. A red box highlights these two rows. At the bottom, there's a link to 'Learn more about navigation'.

Title	Menu items
Footer menu	Search
Main menu	Home, Catalog

Default Menus

Main Menu: The main menu appears on every page of your online store and is probably the one you think of when you think about navigating around the pages of a site. It is usually displayed as items across the width of the header, or else as a list of items in a sidebar. A customer will go to your main menu to find your products and information about your business, like an "About" page.

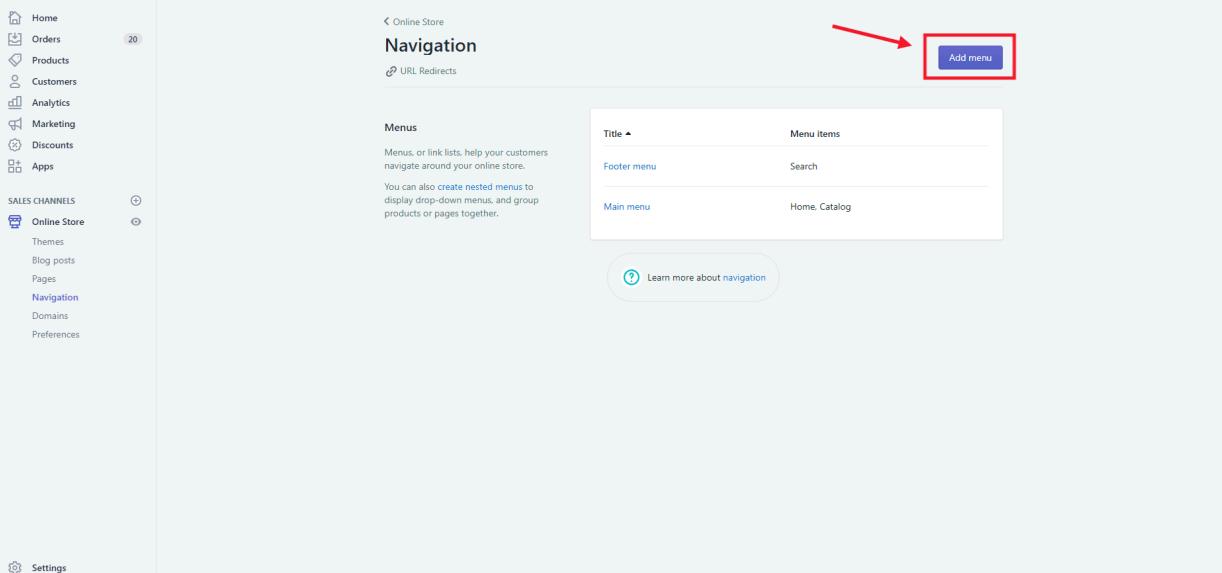
Footer Menu: The footer menu is usually displayed as items across the width of the footer. A customer will probably look at your footer menu to find information about your store policies and contact information.

Other Menus

You can add more menus (category menus, menus for different pages, etc.) according to your requirements.

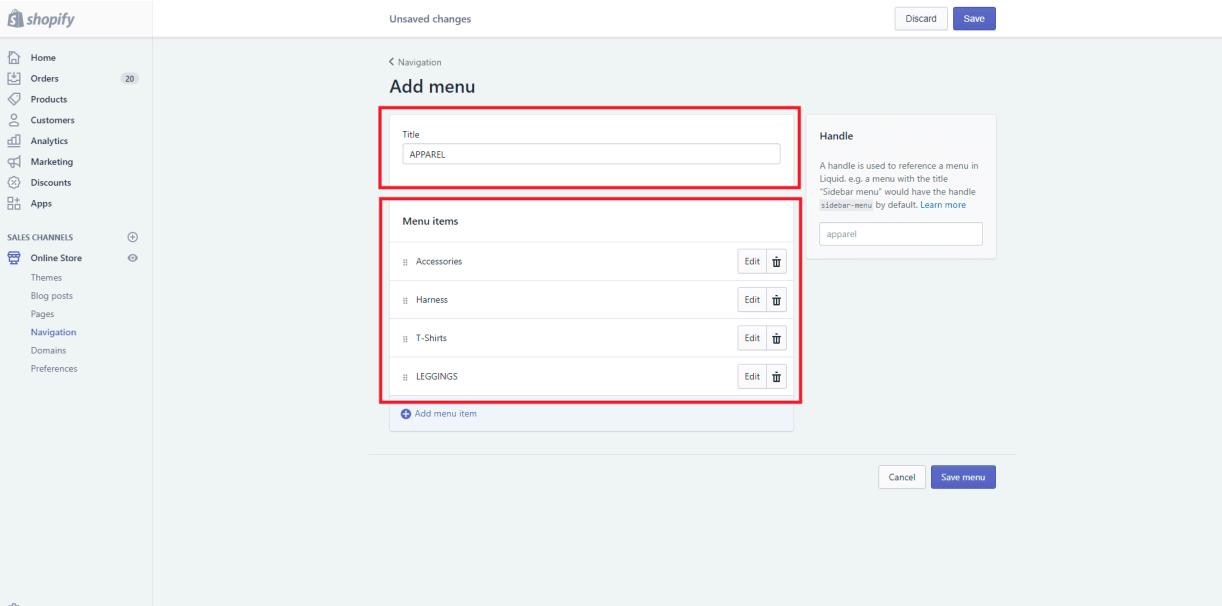
Add a New Menu

Step 1. Click “Add Menu” in the Navigation pane.



The screenshot shows the Shopify Admin interface under the 'Navigation' section. On the left sidebar, under 'SALES CHANNELS', 'Online Store' is selected. In the main content area, the 'Navigation' page is displayed. A red arrow points to the blue 'Add menu' button located at the top right of the 'Menus' table. The table lists two menus: 'Footer menu' (with item 'Search') and 'Main menu' (with items 'Home', 'Catalog'). Below the table is a link to 'Learn more about navigation'.

Step 2. Set the title and then click the “Add menu item” button to add new menu items as needed.

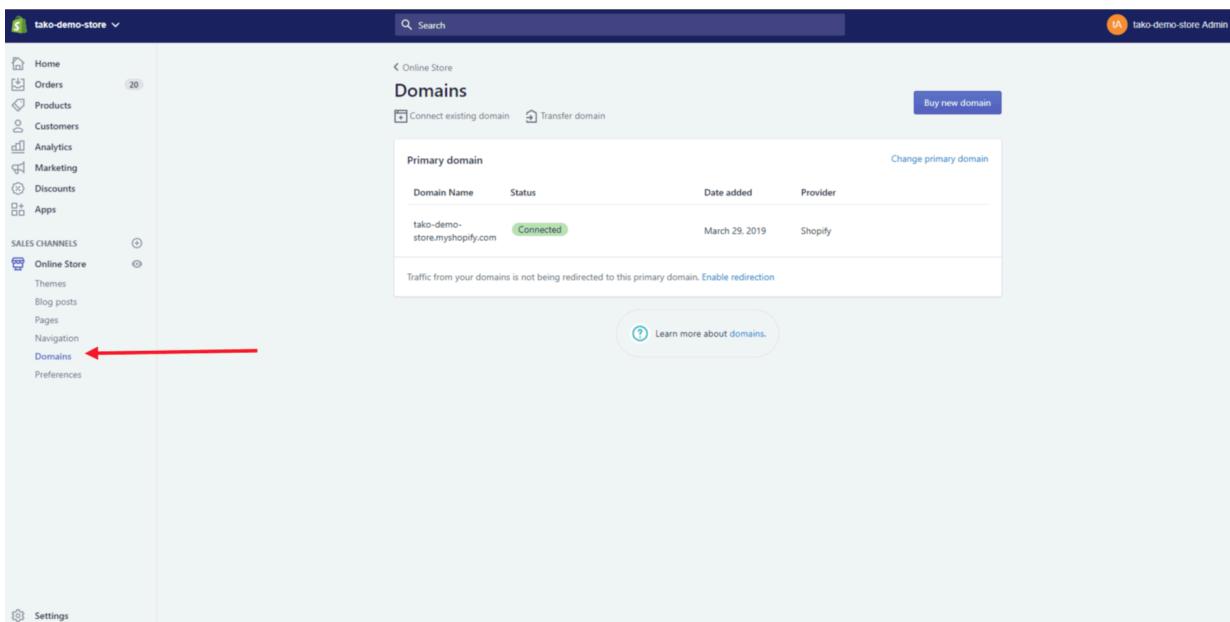


The screenshot shows the 'Add menu' form in the Shopify Admin. The left sidebar shows 'Online Store' is selected. The main form has a title 'APPAREL' in the 'Title' field and 'apparel' in the 'Handle' field. The 'Menu items' section contains four items: 'Accessories', 'Harness', 'T-Shirts', and 'LEGGINGS', each with edit and delete buttons. A red box highlights the 'Title' and 'Handle' fields, and another red box highlights the 'Menu items' list. At the bottom are 'Cancel' and 'Save menu' buttons.

Domains

URL /admin/domains 

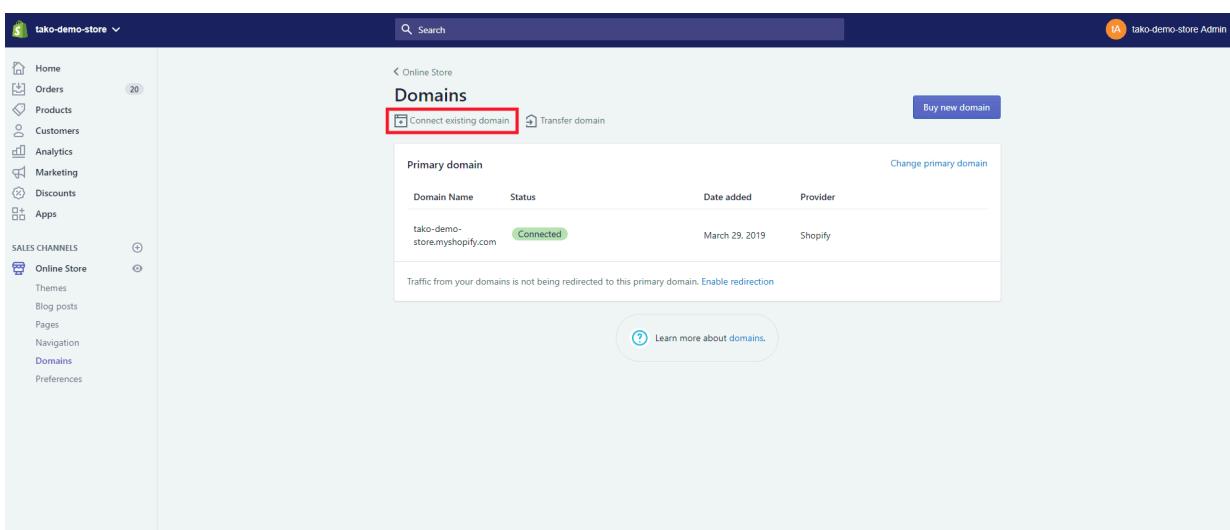
Of course, you want to make sure that your store is connected to your domain! Your domain is the website address people will type into their browsers to find you; for example: www.takoagency.com. You can purchase your domain through a number of online companies, but we recommend GoDaddy because Shopify has an easy integration that will automatically (with your permission) pull in the domain.



The screenshot shows the Shopify Admin interface under the 'Online Store' section. On the left, there's a sidebar with various store management options like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Online Store), Themes, Blog posts, Pages, Navigation, Domains (which has a red arrow pointing to it), and Preferences. The main content area is titled 'Domains' and shows a table for managing domains. A single row is listed: 'tako-demo-store.myshopify.com' with a status of 'Connected', added on March 29, 2019, by Shopify. There are buttons for 'Connect existing domain' (highlighted with a red box), 'Transfer domain', and 'Buy new domain'. A note at the bottom says 'Traffic from your domains is not being redirected to this primary domain. Enable redirection'. A 'Learn more about domains' link is also present.

Step 1. Purchase domain.

Step 2. Click on “Connect Existing Domain” in the upper left.



This screenshot is identical to the one above, showing the 'Domains' page in the Shopify Admin. The 'Connect existing domain' button in the top-left corner of the main content area is highlighted with a red box. All other elements, including the sidebar, domain table, and notes, are the same as the first screenshot.

Step 3. Type in the domain you bought; ex: takoagency.com.

The screenshot shows the 'Connect existing domain' step in the Shopify Admin. At the top left is a back arrow labeled 'Domains'. Below it is a button to 'Buy new domain'. A large input field is labeled 'Domain' with placeholder text 'e.g. example.com' and a note below it saying 'Enter the domain you want to connect.' A red rectangular box highlights this input field. To the right is a blue 'Next' button. Below the form, a note says 'Or you can transfer in your domain to Shopify (domain needs to meet our requirements)'. A call-to-action bubble says 'Learn more about domains.'

Step 4. Follow the ensuing prompts to make sure that it connects properly.

If you are using any other domain provider, you will be required to follow specific instructions to connect your domain. Here's an article that may help:

<https://help.shopify.com/en/manual/domains/add-a-domain/using-existing-domains/connecting-domains>

Preferences

The screenshot shows the 'Preferences' page in the Shopify Admin. At the top left is a URL bar with 'URL /admin/online_store/preferences' and a refresh icon. The top right shows the user 'tako-demo-store Admin'. On the left is a sidebar with 'tako-demo-store' logo, 'Home', 'Orders', 'Products', 'Customers', 'Analytics', 'Marketing', 'Discounts', 'Apps', 'SALES CHANNELS', 'Online Store' (with 'Themes', 'Blog posts', 'Pages', 'Navigation', 'Domains', 'Preferences'), and a red arrow pointing to 'Preferences'. The main content area is titled 'Preferences'. It includes a note about 'Online store is password protected' with a 'Disable password' button. Below that are sections for 'Title and meta description' (with notes about search engine optimization) and 'Homepage title' and 'Homepage meta description' input fields. The bottom of the page has a footer with 'takoagency.com' and a logo.

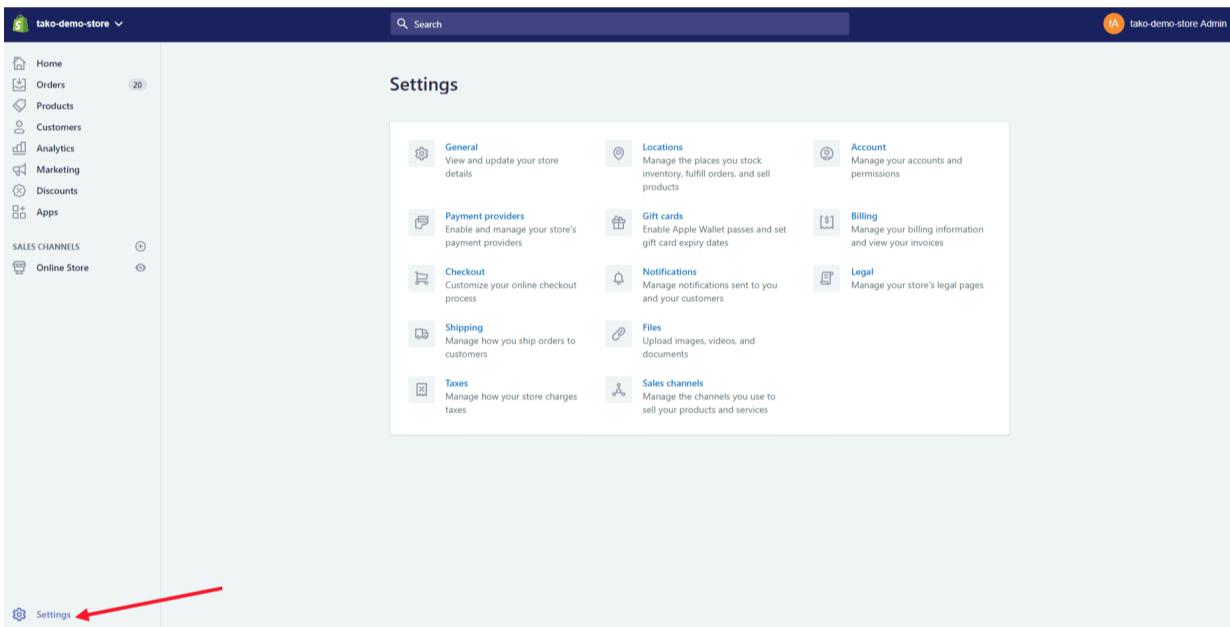
The “Preferences” section allows you to fill in some critical search engine information, including a Facebook pixel and your Google Analytics account. Just follow the prompts provided to link the appropriate accounts!

In the “Password protection” section, you have the option to restrict access to your website. By checking the “Enable password” box, only those visitors who have the password will be able to see your store.

The screenshot shows the Shopify Admin interface with the sidebar menu open. A red arrow points from the sidebar to the 'Preferences' link under the 'Online Store' section. The main content area is titled 'Preferences' and contains a section for 'Online store is password protected'. It includes a note that only visitors with a password can access the online store, a 'Disable password' button, and a 'Title and meta description' section. The 'Title and meta description' section allows setting the homepage title and meta description, with character count indicators. Below this are sections for 'Google Analytics' and 'Facebook Pixel', each with their respective configuration fields.

Settings

The settings section of your Shopify admin panel contains a lot of important areas to pay attention to. Let's take a look at a few of them.

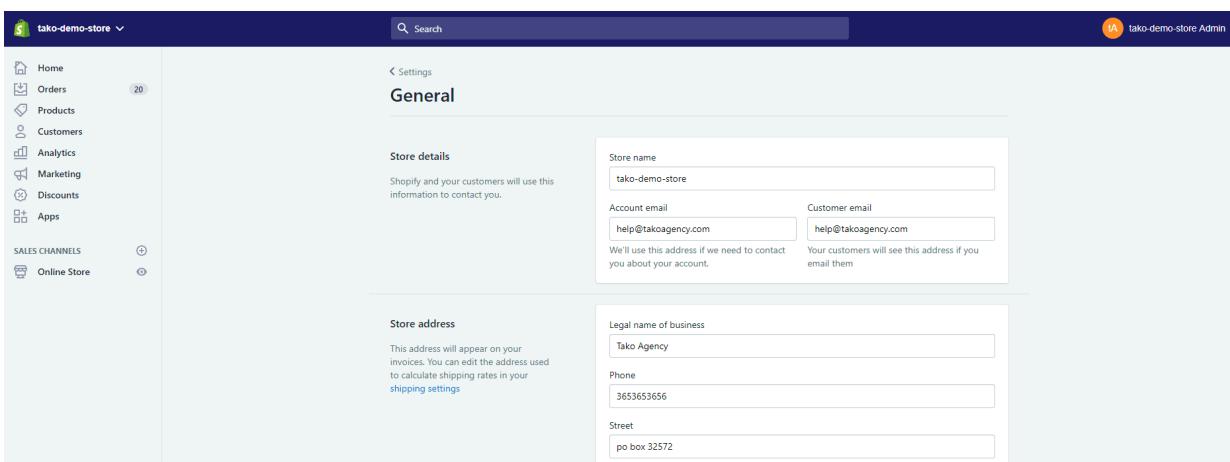


A screenshot of the Shopify Admin Settings page. The left sidebar shows navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, and Online Store. The main content area is titled 'Settings' and contains a grid of nine sections: General, Locations, Account; Payment providers, Gift cards, Billing; Checkout, Notifications, Legal; Shipping, Files, Taxes; and Taxes, Sales channels. A red arrow points to the 'Settings' link in the sidebar.

General

URL </admin/settings/general> ↗

The “General” section is one of the most important pages on your site and covers essential elements like address, timezone, currency, and other details.



A screenshot of the Shopify Admin General page. The left sidebar shows navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels, and Online Store. The main content area is titled 'General' and contains two sections: 'Store details' and 'Store address'. The 'Store details' section includes fields for 'Store name' (tako-demo-store), 'Account email' (help@takoagency.com), and 'Customer email' (help@takoagency.com). The 'Store address' section includes fields for 'Legal name of business' (Tako Agency), 'Phone' (3653653656), and 'Street' (po box 32572).

Taxes

URL /admin/settings/taxes 

Here you configure the relevant taxes settings for your store.



Tako Agency Pro Tip:

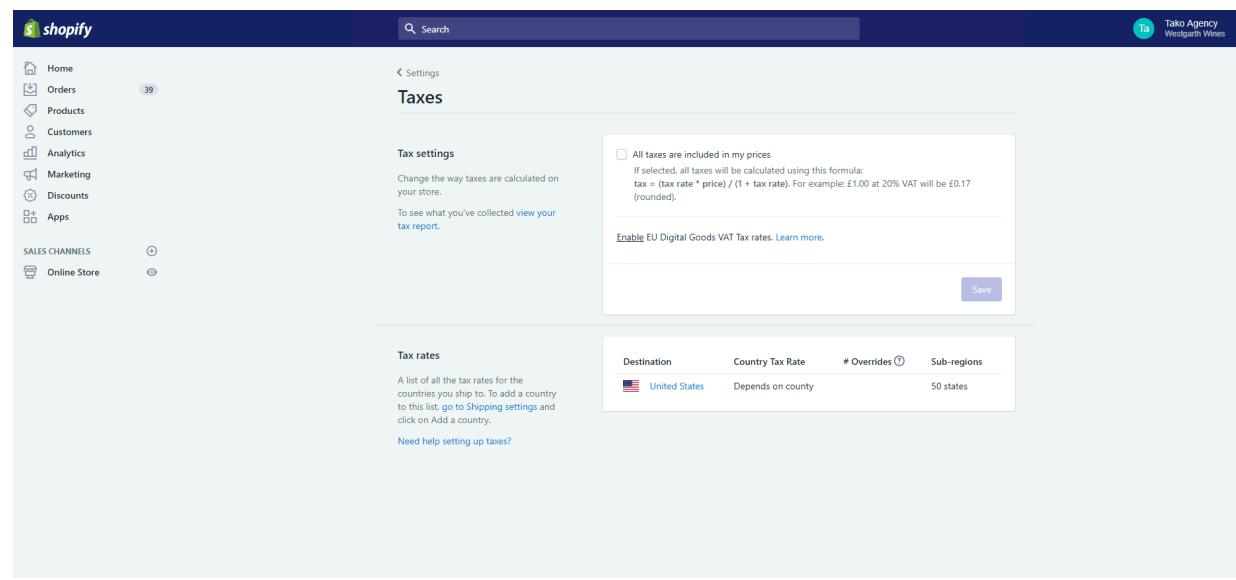
Don't let yourself become confused or intimidated by this section. If you're really concerned you can contact a CPA or other tax professional to help you make the right decision, but why not start with Shopify's own manual? Access that here: <https://help.shopify.com/en/manual/taxes/general-steps>

As a merchant, you might need to charge taxes on your sales, and then report and remit those taxes to your government. If you sell physical goods in a particular state, you are probably required to collect sales tax from your customers.

Here are some common (but not universal) exceptions to state sales taxes:

- Food, particularly from grocery stores to be prepared in the home
- Prescription drugs
- Agricultural products, like seeds and animal food
- Products for resale, raw materials, or inventory that will be resold
- Intangible property (such as computer software)

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.



The screenshot shows the Shopify Admin interface for managing taxes. The left sidebar includes links for Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, it shows Online Store. The main content area has a header 'Taxes' with a back arrow and a search bar. Below this is a 'Tax settings' section with a checkbox for 'All taxes are included in my prices'. A note explains that if selected, all taxes will be calculated using the formula: $\text{tax} = (\text{tax rate} * \text{price}) / (1 + \text{tax rate})$. It also mentions enabling EU Digital Goods VAT Tax rates. A 'Save' button is at the bottom of this section. Below is a 'Tax rates' section with a table showing rates for the United States. The table has columns for Destination (United States), Country Tax Rate (Depends on county), # Overrides (50 states), and Sub-regions.

Destination	Country Tax Rate	# Overrides	Sub-regions
United States	Depends on county	50 states	

If you do charge taxes, you'll need to configure the appropriate Tax Rate:

Step 1. Before you can set up the tax rate, you must first define the country or countries (shipping zone) you'll be shipping to by clicking the blue “go to Shipping settings” link.

The screenshot shows the 'Taxes' section of the Shopify Admin. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under 'SALES CHANNELS', 'Online Store' is selected. The main area has a 'Tax settings' section with two checkboxes: 'All taxes are included in my prices' (unchecked) and 'Charge taxes on shipping rates (US shipping taxes automatically calculated)' (unchecked). Below this is a note about EU Digital Goods VAT Tax rates. A 'Save' button is at the bottom right. The 'Tax rates' section shows a table with two rows: 'Rest of World' (Country Tax Rate: 0%) and 'United States' (Country Tax Rate: Depends on county, Sub-regions: 62 states). A 'Need help setting up taxes?' link is at the bottom of this section.

In the shipping window, click “Add shipping zone” to add a new shipping zone or “Edit” to edit already added shipping zones.

● Add/Edit Shipping zone

The screenshot shows the 'Shipping' section of the Shopify Admin. The sidebar includes 'Home', 'Orders', 'Products', 'Customers', 'Analytics', 'Marketing', 'Discounts', 'Apps', and 'Online Store'. The main area has a notice about missing product variant weights with a 'Edit variant weights' button. The 'Shipping origin' section shows '6153 Mehrten Cir' as the shipping origin. The 'Shipping rates at checkout' section has a note about defining shipping zones and a warning about tax settings. It lists shipping zones: 'DOMESTIC' (United States, USPS, Calculated at checkout), 'REST OF WORLD' (241 countries, DHL Express, Discounted rates from Shopify Shipping, Calculated at checkout), and another 'USPS' entry (Calculated at checkout). Red boxes highlight the 'Add shipping zone' and 'Edit' buttons in the 'DOMESTIC' section.

• Shipping zone section

The screenshot shows the 'Add shipping zone' page in the Shopify Admin. The 'Zone name' field is set to 'Eastern Europe Area'. The 'Countries' section lists several countries: Bulgaria, Poland, Romania (42 of 42 countries), Russia (82 of 82 regions), and Ukraine. Below these sections are buttons for 'Add rate' under 'Price based rates', 'Weight based rates', and 'Calculated rates'.

The countries you added in the Shipping settings will appear as a Destination.

The screenshot shows the 'Taxes' settings page in the Shopify Admin. It includes sections for 'Tax settings' and 'Tax rates'. The 'Tax rates' section lists two entries: 'Rest of World' with a 0% tax rate and 'United States' with a 'Depends on county' tax rate. A red box highlights the 'Tax rates' table.

Destination	Country Tax Rate	# Overrides	Sub-regions
Rest of World	0%		
United States	Depends on county		62 states

Step 2. Once you've defined the shipping zones, you can set up the specific tax rates for each region.

As you can see in the screenshot below, some countries have sub-regions.

Destination	Country Tax Rate	# Overrides	Sub-regions
Bulgaria	0%		
Poland	0%		
Rest of World	0%		
Romania	0%		42 counties
Russia	0%		82 regions
Ukraine	0%		
United States	Depends on county		62 states

You can choose to set the same tax rate for the whole country or different tax rates for each sub-region by clicking the country name:

Destination	Country Tax Rate	# Overrides	Sub-regions
Bulgaria	0%		
Poland	0%		
Rest of World	0%		
Romania	0%		42 counties
Russia	0%		82 regions
Ukraine	0%		
United States	Depends on county		62 states

[Taxes](#)

Romania

Base taxes

All applicable taxes for Romania. These taxes will be used unless overrides are specified below.

[Reset to default tax rates](#)

COUNTRY TAX 0.004 Set tax for the whole country

REGIONS

Alba	0	Tax	added to 0.004% federal tax
Arad	0.002	Tax	added to 0.004% federal tax
Arges	0	Tax	added to 0.004% federal tax
Bacau	0	Tax	added to 0.004% federal tax
Bihor	0	Tax	added to 0.004% federal tax
Bistrita-Nasaud	0	Tax	added to 0.004% federal tax
Botosani	0	Tax	added to 0.004% federal tax
Braila	0	Tax	added to 0.004% federal tax

For the United States, if you want to use Shopify's automatic tax settings, then you can check the "calculate taxes automatically" box.

Step 3. If you sell digital products, then set up the taxes that apply to those items. When all are done, click the “Save” button.

The screenshot shows the 'Calculating taxes' section of the Shopify Admin. A red box highlights the checkbox 'Calculate taxes automatically'. Another red box highlights the 'ADD A PHYSICAL PRESENCE' section, which includes a table for adding tax rates by state and zip code. A third red box highlights the 'Save' button at the bottom right.

Files

URL </admin/settings/files>

This one's pretty self-explanatory. Here you can manage any and all files you've uploaded as part of your site: images, fonts, zip files, and so on. When you upload a file, it will be listed here and generate a Shopify CDN link.

The screenshot shows the 'Files' section of the Shopify Admin under 'Settings'. It lists a single file named 'Primula_Britt_189x251_1fd8f89e-7e07-4da1-84e8-30c58186e3bb.jpg' with its URL highlighted in a red box: https://cdn.shopify.com/s/files/1/0092/9828/0510/files/Primula_Bri.... The file size is listed as 9.14 KB.

You might upload files to:

- Add an image to a webpage, blog post, product page, or collection page.
- Add an image or logo to customize your theme.
- Make a file available for customers to download

After the file is uploaded in this section, Shopify will generate a CDN link that'll allow you to directly visit that file using that link.

To upload a file, click the purple “Upload Files” button at the top right corner.

The screenshot shows the Shopify Admin interface under the 'Files' section. On the left is a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. The main area has a header 'Settings' and a 'Files' tab. A red box highlights the 'Upload files' button in the top right corner. Below it is a table with columns for 'File', 'URL', and 'Size'. The table lists various files such as 'label_2x_1c010cb4-00aa-4977-9fc6-ce502cb0527a.jpg', 'other_2x_e8a05d05-24ff-46f9-9686-c108daf3b167.jpg', and 'rhone_2x_a3838c65-c4c9-43a7-a9fb-bb54ef78cd3a.jpg', each with its corresponding URL and file size.



Tako Agency Pro Tip:

The Shopify file system is extremely helpful to merchants that want to make quick changes. Shopify stores your images, icons, etc right inside your store so that they are easily accessible for you to use across your site.

Payment Providers

URL [/admin/settings/payments](#)

It's time to GET THAT CASH! In this section, you can manage and enable payment providers for your store.

How to add a payment provider:

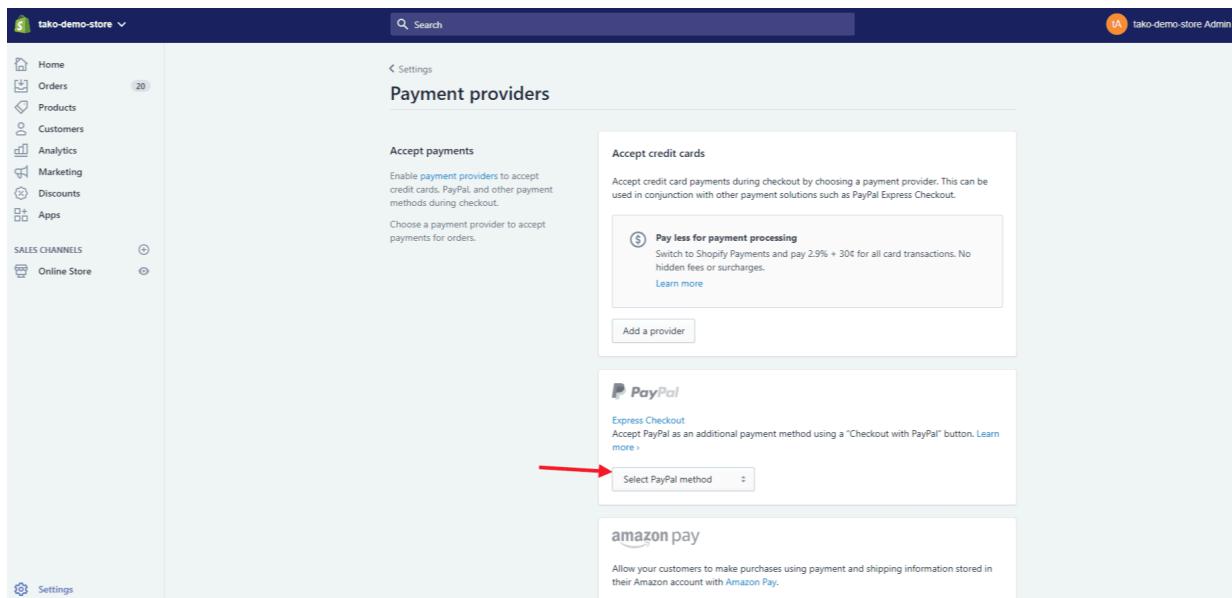
Step 1. Figure out how you prefer to collect payments and from which provider.

We recommend Shopify Payments because you can accept payments immediately AND avoid transaction fees (though there is still a payment processing fee, which is different). If you choose to use another provider, you will incur an additional transaction fee from Shopify.

You will also notice that Shopify Payments automatically allows you to accept all credit cards and even Shopify Pay, Apple Pay, and Google Pay. Keep this capability in mind when choosing your payment provider, as most others don't offer this option.

The screenshot shows the Shopify Admin interface for managing payment providers. On the left, a sidebar titled 'Accept payments' provides general information and links to terms of service. The main area is titled 'shopify payments powered by stripe'. It displays a message about accepting payments with Shopify Payments, a 'Using: Shopify Payments' section with 'View payouts' and 'Edit' buttons, and a summary of payment settings. A red box highlights the 'Transaction fee' section, which shows '0%' and a smiley face icon. Another red box highlights the 'Notifications' and 'Fraud prevention' sections, which include checkboxes for test mode, email notifications, and fraud detection. The 'PAYMENT METHODS' and 'ACCELERATED CHECKOUTS' sections are also visible at the bottom.

Step 2. Connect your business PayPal account. If you don't have one, get one! Many customers love paying with PayPal because of its robust purchase protections.



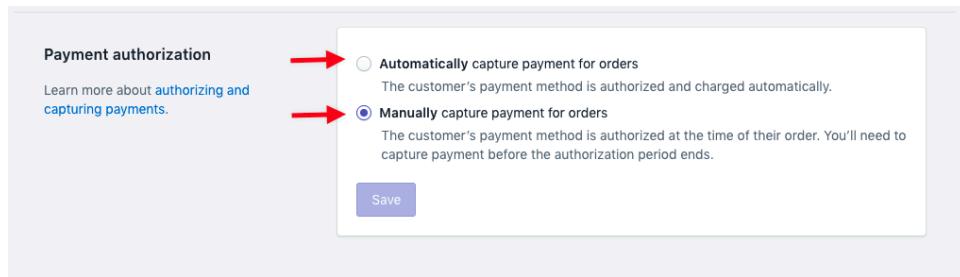
Step 3. If you would like to use additional payment methods, you will see those options as you scroll down on the Payment Providers page. Pay particular attention to the payment authorization settings at the bottom of the Payment Providers page. If you're using Shopify Payments or another credit card payment provider, you'll need to decide how to capture payment from your customers: automatically, or manually.

Automatically capture payment for orders

Most merchants set their stores to capture credit card payments automatically. This allows the store to automatically charge customers' cards before the authorization period for that order ends, which saves time when processing orders.

Manually capture payment for orders

If you set up manual capture, then you'll need to capture the funds for each order from the Orders page of Shopify. If you use this option, you have to capture the payment for each order before the authorization period for that order ends. You won't receive money from orders automatically. This option is most frequently used by merchants whose orders must be sent out by the warehouse first before the card is charged.



Locations

URL </admin/settings/locations>

A location is a physical place or an app where you do any or all of the following activities: sell products, ship or fulfill orders, and stock inventory. For example, if your store is a dropshipping site that uses Oberlo, then Oberlo will be a location.

You have the option to set up multiple locations so that you can track inventory and fulfill orders at all your locations, but the limit on the number of locations you can have depends on the Pricing Plan of your store account.

See here for the limit:

The maximum number of locations that you can have depends on your plan:

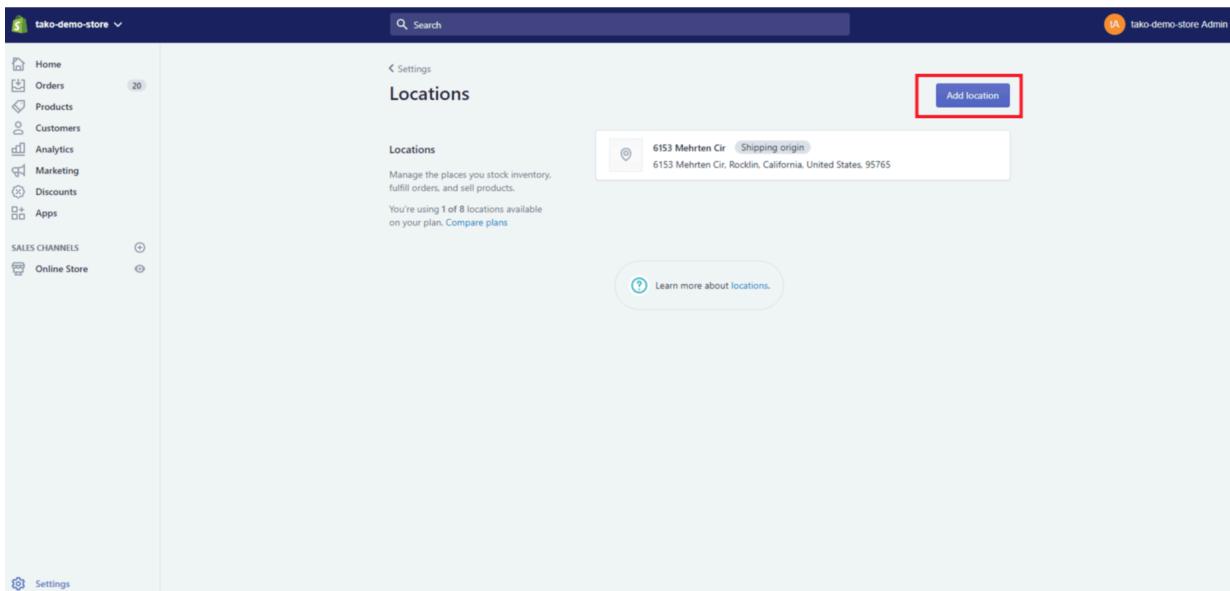
- Shopify Lite - 3
- Basic Shopify - 4
- Shopify - 5
- Advanced Shopify - 8
- Shopify Plus - 20 (Contact Plus Support if you need more than 20 locations.)

See here for the page:

The screenshot shows the 'Locations' page in the Shopify Admin. On the left is a sidebar with navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. The main content area has a heading 'Locations' with a sub-instruction: 'Manage the places you stock inventory, fulfill orders, and sell products.' Below this is a card for a location: '6153 Mehrten Cir, Shipping origin' with the address '6153 Mehrten Cir, Rocklin, California, United States, 95765'. At the bottom of the content area is a link 'Learn more about locations.'

To add a location:

Step 1. Click “Add location” button at the top right corner.



Step 2. Fill the form and click “Save” button.

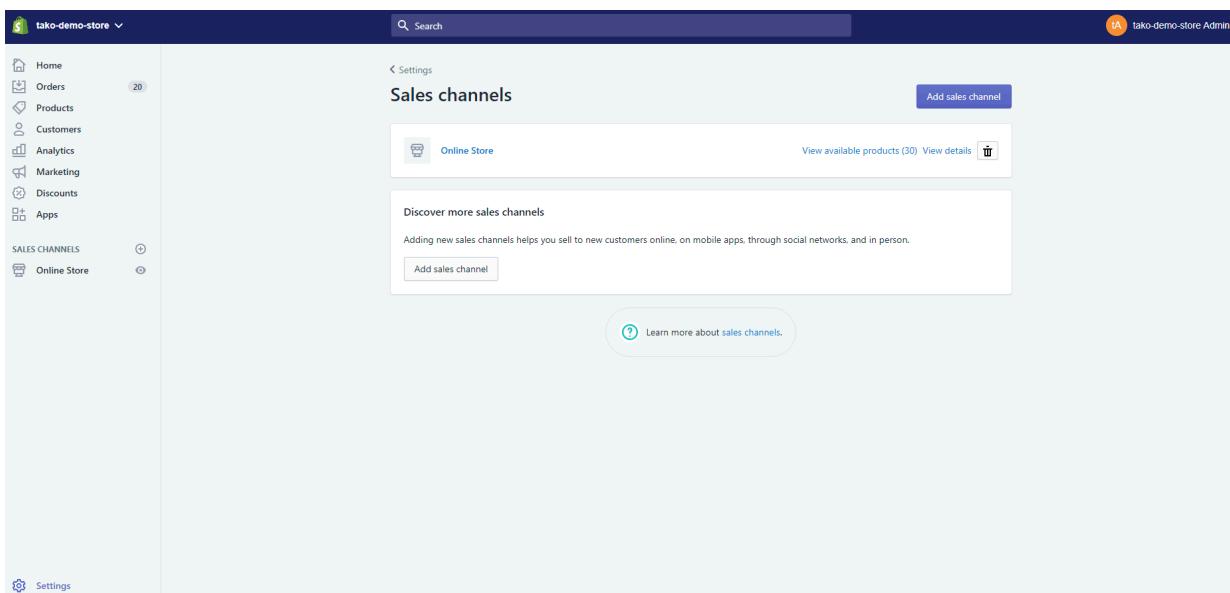
A screenshot of the Shopify Admin interface, specifically the 'Add location' form. The left sidebar includes Home, Orders (with 39 notifications), Products, Customers, Analytics, Marketing, Discounts, and Apps. Under Sales Channels, there's an Online Store link. The main form has a yellow header 'Add location'. It contains a warning message: 'You have a private app that doesn't support locations. Your private app won't work if you add another location. If the private app is essential to running your store, make sure it's updated before you add another location.' Below this is a 'View private apps' button. The form is divided into sections: 'Details' (Location name: Paris warehouse) and 'Address' (Address, Apartment, suite, etc., City: United States, ZIP code: Alabama, Country: United States, State: Alabama, Phone number). At the bottom right of the form is a blue 'Save' button, which is highlighted with a red box.

Sales Channels

URL /admin/settings/channels 

Shopify is a wonderfully versatile e-commerce platform because it's got built-in capability for other online sales channels like Amazon, Facebook, Instagram, and more. Now you can sell more in more places!

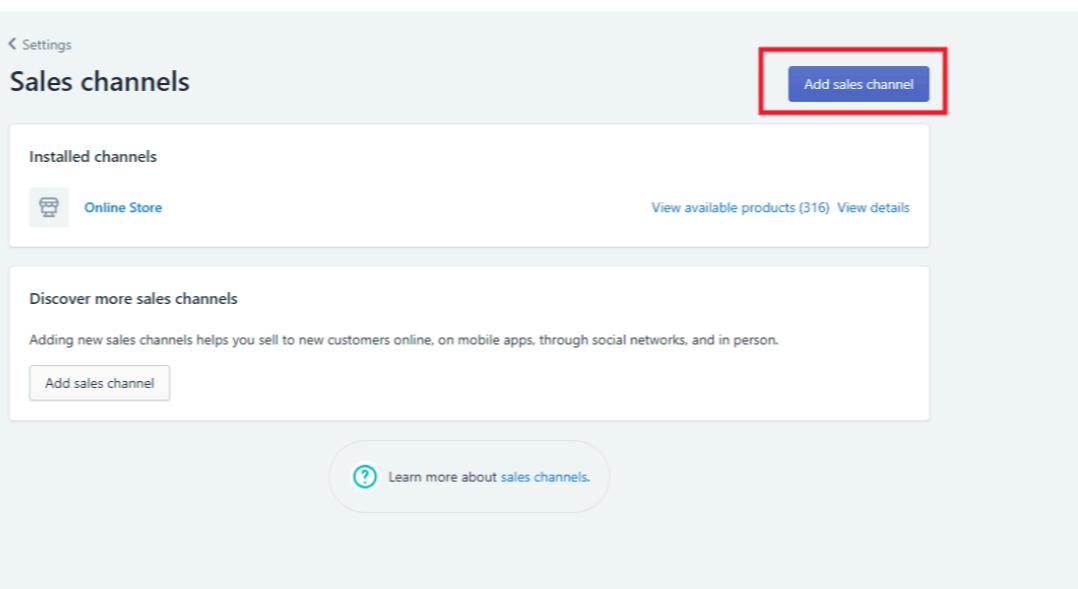
When you add a sales channel, it will be listed here on the Sales Channels Page.



The screenshot shows the 'Sales channels' page in the Shopify Admin. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under 'SALES CHANNELS', there's a link to 'Online Store'. The main area has a header 'Sales channels' with a 'Settings' link and a 'Add sales channel' button. Below this, there's a section for the 'Online Store' with a thumbnail, a 'View available products (30)' link, and a 'View details' link. A trash can icon is also present. A 'Discover more sales channels' section follows, with a note about selling online, a 'View available products (30)' link, and an 'Add sales channel' button. At the bottom, there's a 'Learn more about sales channels.' link.

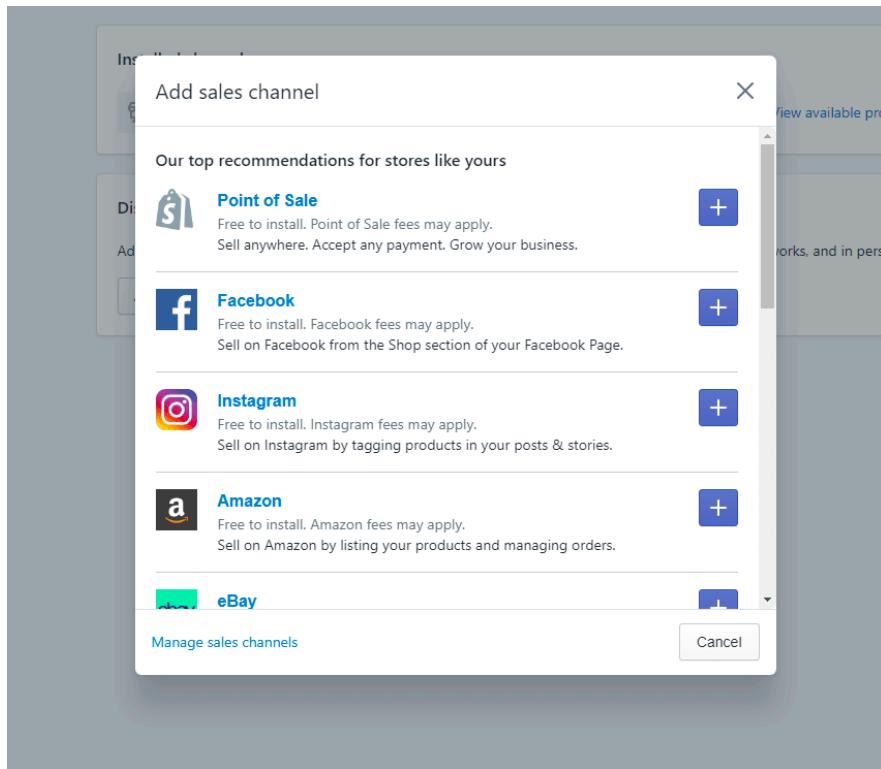
To add an online sales channel to your store:

Step 1. Click the purple “Add sales channel” button at the top right corner.



This screenshot is identical to the one above, but the 'Add sales channel' button in the top right corner is highlighted with a red box to draw attention to it.

Step 2. Choose the sales channels you'd like to add by clicking the purple "+" icon on the opened dialog. Then you can see the details of configuration for each of the sales channels.



Checkout

URL </admin/settings/checkout> 

The “Checkout” section of your settings covers the technical aspects of your checkout page, such as customer accounts and methods of contact, form fields, order processing specifics, abandoned cart mechanics, and more.

To customize the appearance of the checkout page, you can click “Customize checkout” button and be redirected to the Shopify Customizer.

Customize the style of your checkout

Upload your store's logo, change colors and fonts, and more.

Customize checkout

Accounts are disabled
Customers will only be able to check out as guests.

Accounts are optional
Customers will be able to check out with a customer account or as a guest.

Accounts are required
Customers will only be able to check out if they have a customer account.

To check out
Customers can check out using either their phone number or email
Customers who choose to check out using their phone number will get order updates by SMS. This means that their email may not be collected during checkout.

Customers can only check out using email

To receive shipping updates
Customers can choose to add a phone number or email to receive shipping updates after they complete their order

Customizing the style of your checkout

If you sell your products using an online store, you can customize the style of your checkout pages in the theme editor. Add your company logo, change the colors, or choose a new font to make the checkout match your branding.

Click customize checkout button.

Customize the style of your checkout

Upload your store's logo, change colors and fonts, and more.

Customize checkout

Accounts are disabled
Customers will only be able to check out as guests.

Accounts are optional
Customers will be able to check out with a customer account or as a guest.

Accounts are required
Customers will only be able to check out if they have a customer account.

To check out
Customers can check out using either their phone number or email
Customers who choose to check out using their phone number will get order updates by SMS. This means that their email may not be collected during checkout.

Customers can only check out using email

To receive shipping updates
Customers can choose to add a phone number or email to receive shipping updates after they complete their order

You'll be directed to this page. Just click the "Theme settings" tab in the top left, and review each of these sections to customize your checkout page.

Enabling or Disabling customer accounts

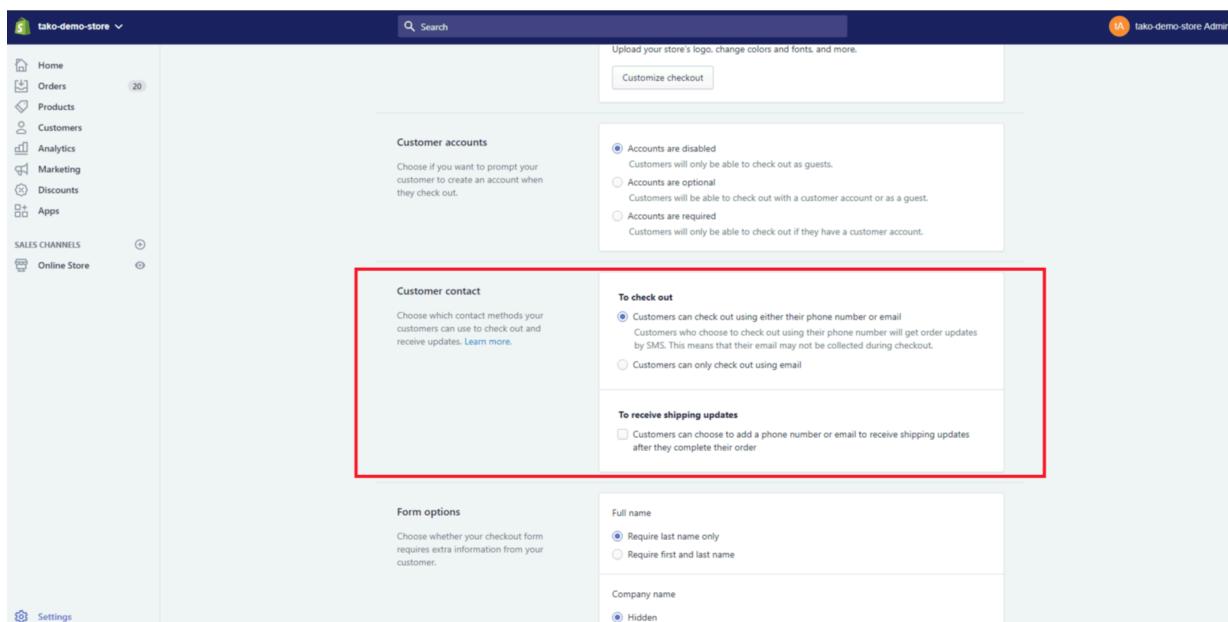
Here you can decide if you want to give your customers the option to create an account with you for faster checkout in the future, or simply checkout as a guest. If you enable customer accounts, Shopify stores password-protected information about a customer's identity, order history, and current order status. Your customer's details, such as address information, will be pre-filled during checkout on future orders.

Accounts are disabled: Customers won't see the option to create an account or log in during checkout. They'll have to manually enter all their details at checkout each time.

Accounts are optional: Customers can choose to create an account, but it's not mandatory to check out. If customers have an account and they're logged in, then their address fields are pre-filled when they place an order.

Accounts are required: Customers will need to create an account, or have an account and be logged in to complete the checkout. This setting is useful if you're running a wholesale or members-only store, for example. Address fields are pre-filled when the customer places an order.

Customer Contact



This one's easy! Shopify explains your options clearly.

Editing the checkout form options

Here you can decide what kinds of information you want to collect from your customers during checkout. You can edit some of the fields to be required, optional, or hidden. “Hidden” means the customer won’t even see it on the form.

For example, some customers don't like to provide their phone number during an online checkout, so they might abandon their cart if you make it a required field. However, in some cases your payment provider or shipping carrier might require a customer to provide a phone number to complete the checkout.

The screenshot shows the 'Form options' section of the Shopify Admin Settings. A red box highlights the 'Form options' area. It includes settings for 'Full name', 'Company name', 'Address line 2', and 'Shipping address phone number'. Below this is the 'Order processing' section, which is also highlighted with a red box. It contains settings for 'While the customer is checking out' (checkbox for 'Use the shipping address as the billing address by default'), 'After an order has been paid' (radio buttons for 'Automatically fulfill the order's line items', 'Automatically fulfill only the gift cards of the order', and 'Do not automatically fulfill any of the order's line items'), and 'After an order has been fulfilled and paid' (checkbox for 'Automatically archive the order'). At the bottom are sections for 'Email marketing' and 'Additional scripts'.

Setup order processing and archiving

You can choose automatic or manual fulfillment for orders and order archiving here. When you fulfill an order in Shopify, you begin the process of sending the order on its way to the customer.

The screenshot shows the 'Order processing' and 'Email marketing' sections of the Shopify Admin Settings. A red box highlights the 'Order processing' section. It includes settings for 'While the customer is checking out' (checkbox for 'Use the shipping address as the billing address by default'), 'After an order has been paid' (radio buttons for 'Automatically fulfill the order's line items', 'Automatically fulfill only the gift cards of the order', and 'Do not automatically fulfill any of the order's line items'), and 'After an order has been fulfilled and paid' (checkbox for 'Automatically archive the order'). Below this is the 'Email marketing' section, which includes checkboxes for 'Show a sign-up option at checkout' and 'Preselect the sign-up option'. At the bottom are sections for 'Additional scripts' and 'Email marketing'.

Checkout Language: You can translate your checkout page to a different language.

The screenshot shows the Shopify Admin dashboard with the 'tako-demo-store' logo at the top left. The main menu on the left includes Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under 'SALES CHANNELS', there is an 'Online Store' section. The central area has a search bar at the top. A sidebar on the right says 'Any customizations you'd like to appear on the order status page of the checkout. Learn more at the Shopify Help Center.' Below this are sections for 'Email marketing' (checkboxes for 'Show a sign-up option at checkout' and 'Preselect the sign-up option') and 'Abandoned checkouts' (checkbox for 'Automatically send abandoned checkout emails', dropdowns for 'Send to' and 'Send after'). At the bottom, a box titled 'Checkout language' contains the message 'Your store's checkout page is displayed in English' and a 'Manage checkout language' button. A red arrow points to this button. A 'Save' button is located at the bottom right.

You can change the checkout language by clicking the “Change theme language” link in the upper left corner. It’ll open a modal window for choosing your language.

The screenshot shows the 'Language (English)' settings page. The left sidebar includes Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under 'SALES CHANNELS', there is an 'Online Store' section with 'Themes' selected. The main content area has a title 'Language (English)' with a 'Change theme language' link, which is highlighted with a red arrow. Below it is a navigation bar with tabs: General, Blogs, Cart, Collections, Contact, Customer, Homepage, Layout, Products, Gift cards, Sections, Date formats, and 'Checkout & system' (which is underlined). A 'Save' button is at the top right. A 'Filter' dropdown and a 'Search translations' input field are also present.

And you can set your custom names to the titles and labels of checkout page.

The screenshot shows the 'Checkout & system' settings page. The left sidebar includes Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Under 'SALES CHANNELS', there is an 'Online Store' section with 'Themes' selected. The main content area has a title 'Change theme language' with a 'Checkout & system' tab selected. A 'Filter' dropdown and a 'Search translations' input field are at the top. The page is divided into sections: 'Checkout review' (with 'Review notice html' input), 'Checkout review blocks' (with 'Title' for 'Review order' and 'Checkout as guest', and 'Contact method title' for 'Contact', 'Billing address title' for 'Billing', 'Shipping address title' for 'Ship to', 'Shipping method title' for 'Method', and 'Payment method title' for 'Payment'), and 'Change link label' (with an input field). All these sections are highlighted with a red border.



Tako Agency Pro Tip:

If you're on a regular Shopify plan, you only have a few options in terms of customization, although it's pretty simple to change the background color of your checkout screen or add an image. The challenge is to utilize that space correctly.

Shopify Plus is a great solution that enables customization of the entire checkout process from beginning to end.

If you need help, don't hesitate to contact us. Remember you get 10% OFF if you mention this guide to us when you reach out!



Account

URL </admin/settings/account>

The screenshot shows the 'Account' settings page in the Shopify Admin. The left sidebar includes links for Home, Orders (20), Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Online Store), and Settings. The main content area has a header 'Account' with a back arrow. It features sections for 'Account overview' (Member since Mar 29, 2019, Current plan Affiliate/Monthly, Account status Active), 'Accounts and permissions' (Account owner: 'tako-demo-store Admin' last login April 2, 2019, 3:20 am -0700), 'Staff accounts (0 of 15)' (Add staff account button), and 'Login services' (Allow staff to use external services to log in to Shopify, Google Apps entry: Name 'Google Apps', Status 'Disabled: Staff can't use Google Apps to log in', Edit button). A search bar is at the top right.

Shopify has two different types of accounts, each with varying permission options: an Owner Account & Staff Accounts. (There's a third type called Collaborator accounts that give access to various areas of your store to other professionals with whom you might be working. Click the blue “collaborator accounts” link to learn more about these types of accounts from Shopify.)

The account owner is the person whose email and contact information were originally used to sign up for Shopify.

- There is only one owner account permitted, and it has the authority to manage plans, the store name, email, staff accounts, and other relevant information.
- The number of staff accounts permitted ranges from one to unlimited depending on the store’s pricing plan. See here for details:

The number of staff accounts available is determined by your Shopify [pricing plan](#):

- The **Shopify Lite** plan includes 1 staff account.
- The **Basic Shopify** plan includes 2 staff accounts.
- The **Shopify** plan includes 5 staff accounts.
- The **Advanced Shopify** plan includes 15 staff accounts.
- The **Shopify Plus** plan includes unlimited staff accounts.

Only account owners can:

- Change pricing plans.
- Manage account details like store name, credit card, and account email.
- Create and manage staff accounts.
- Choose a new account owner by transferring account ownership.
- Manage payment options.
- Change billing information.
- View Shopify bills.
- Add or change third party integrations.
- Enable or disable two-step authentication for staff account logins.
- Access Shopify Capital settings.
- List a store on the Shopify Exchange marketplace.

Shipping

URL /admin/settings/shipping ➔

Here you can manage all your store's shipping settings including shipping rates and options, shipping labels, packing slips, and more.

To make calculating shipping costs easier, you can define regions called "shipping zones" where you plan to ship your products. All your customers in a particular zone will pay the same shipping price, which may or may not be the same as other zones.

The screenshot shows the Shopify Admin interface for the 'Shipping' section. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. The main content area has a header 'Shipping' with a back arrow. Under 'Shipping origin', it says 'Used to calculate shipping rates at checkout.' and shows 'Benicia' as the shipping origin. Under 'Shipping zones', there are two defined zones: 'FIRST ZONE' (United States (California)) and 'FORTH ZONE' (United States (26 of 62 states)). Both zones use 'Advanced Shipping Rules' and are calculated at checkout.

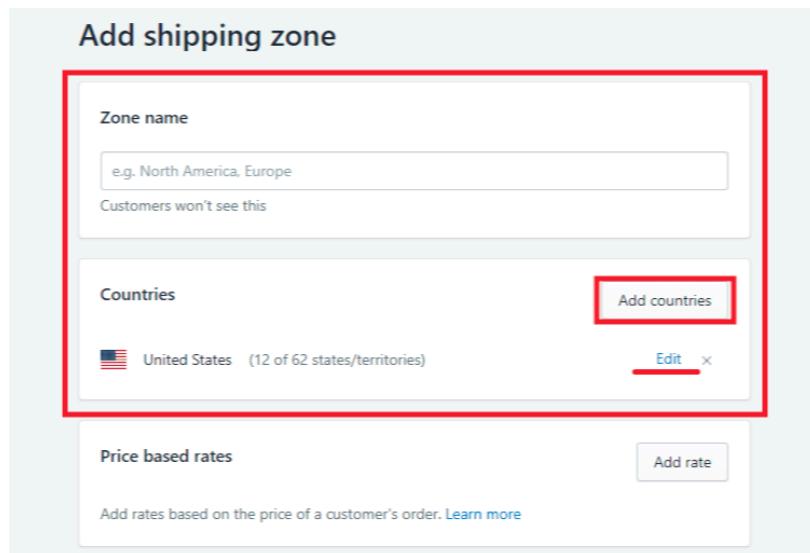
To configure shipping rates:

Step 1. Click the blue "Add Shipping zone" link at the top right corner of the Shipping zones box.

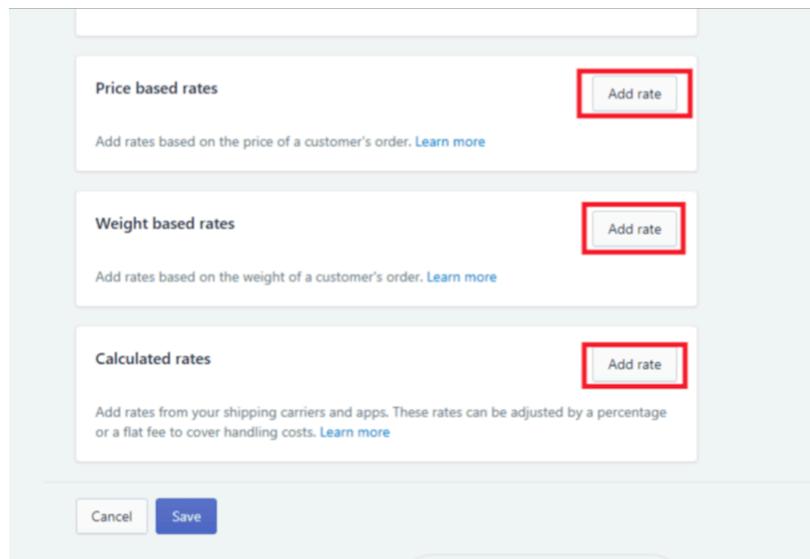
This screenshot shows the same Shopify Admin 'Shipping' page as above, but with a red box highlighting the 'Add shipping zone' button located in the top right corner of the 'Shipping zones' section. The rest of the interface and data points are identical to the first screenshot.

Step 2. Add a zone name and choose Countries by clicking the “Add countries” button.

When you add a country that has states such as the United States or Brazil, you can specify exact states by clicking the blue “Edit” link.

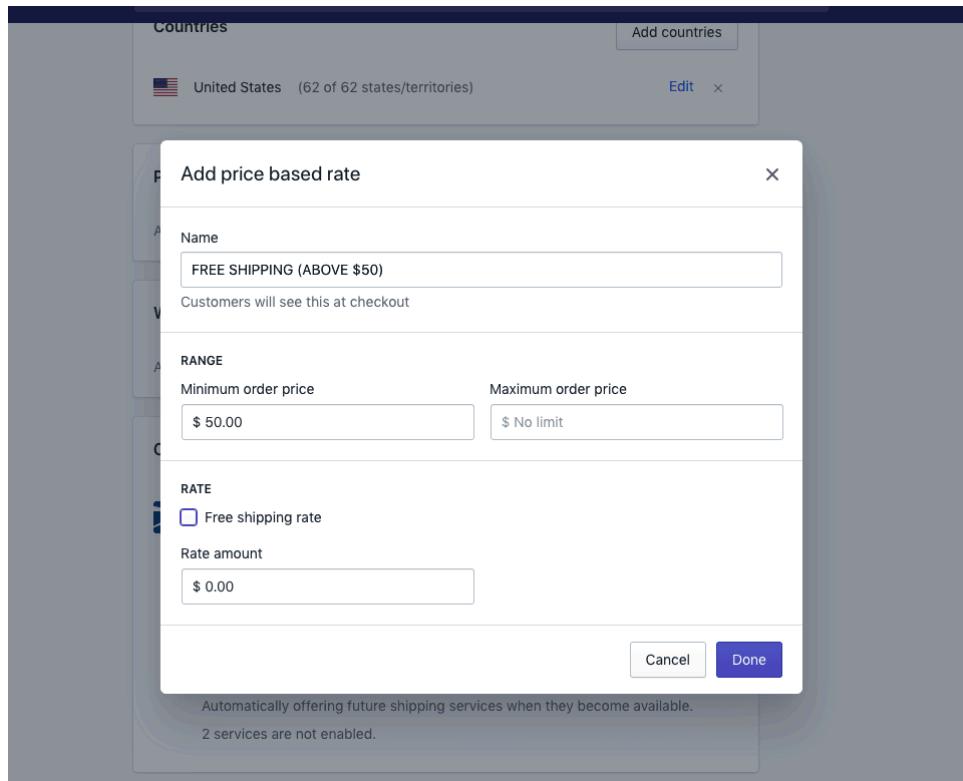


Step 3. Input the shipping rate by clicking the “Add rate” button in either the “Price based rates” section, the “Weight based rates” section, or the “Calculated rates” section. You don’t need to add all three different types of rates; any one will do. If you’re unsure which one is the best fit for your store, click the blue “Learn more” link provided by Shopify.



When you click the “Add rate” button, you’ll get the following pop-up that will allow you to specify the rate conditions.

For example, if you wanted to offer free shipping for orders over \$50, you would create a price-based shipping rate as seen here.



Notifications

URL </admin/settings/notifications> 

Shopify makes it easy to maintain a consistent brand identity across the entire website. The “Notifications” panel covers all of your communications with your customers as well as suppliers and staff. Even though there are some limitations, there’s quite a lot you can customize.

There are plenty of email templates already set up for you to use; they just need a bit of tweaking.

The screenshot shows the 'Notifications' page in the Shopify Admin. On the left, there's a sidebar with links like Home, Orders (20), Products, Customers, Analytics, Marketing, Discounts, Apps, Sales Channels (Online Store), and Settings. The main content area has a header 'Notifications' with a back arrow. It's divided into sections: 'Customers notifications' (with a 'Customize' button) and 'Orders'. The 'Orders' section contains several notification types with their descriptions:

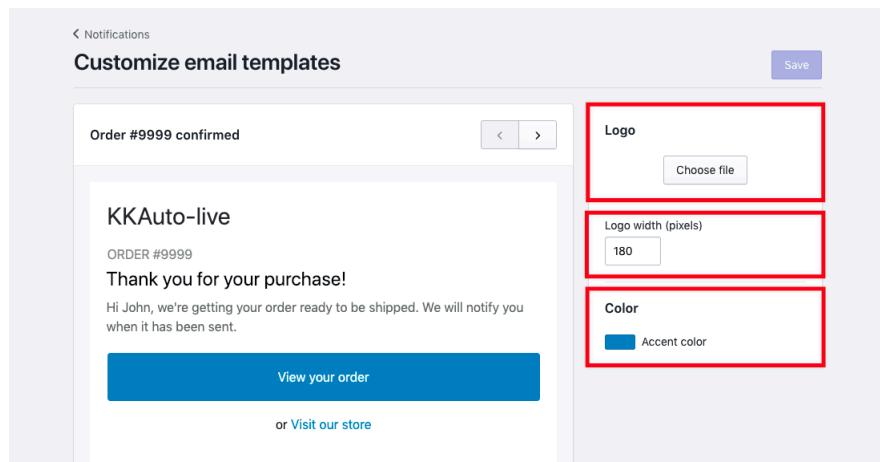
- Order confirmation**: Sent automatically to the customer after they place their order.
- Order canceled**: Sent automatically to the customer if their order is canceled (if you select this option).
- Order refund**: Sent automatically to the customer if their order is refunded (if you select this option).
- Draft order invoice**: Sent to the customer when a draft order invoice is created. You can edit this email invoice before you send it.
- Email cart from POS**: Sent to the customer when you email their cart from POS. Includes a link to buy online.
- Abandoned checkout**: Sent to the customer if they leave checkout before they buy the items in their cart. Configure options in "checkout settings".
- POS Exchange Receipt**: Sent to the customer after they complete an exchange in person and want to be emailed a receipt.
- Gift card created**: Sent automatically to the customer when you issue or fulfill a gift card.

To customize the logo and colors featured in your emails:

Step 1. Click on “Customize” on the left-hand side.

This screenshot shows the same 'Notifications' page as above, but with a red box highlighting the 'Customize' button within the 'Customers notifications' section. A red arrow points upwards from the bottom of the page towards this highlighted button, indicating where the user should click to begin customization.

Step 2. Customize the logo (we recommend a PNG file) and the accent color on the right-hand side of the screen. You'll be able to adjust the width of the image manually.



When you're finished, you can see a preview by navigating to `/admin/email_templates/order_confirmation/edit` and clicking on "Send Test Email" or "Preview"

Liquid variables

You can use liquid variables to output an accent colour and logo image in your templates. The available variables are:

- `{{shop.email_logo_url}}`
- `{{shop.email_logo_width}}`
- `{{shop.email_accent_color}}`

[Read more about using liquid variables in notification templates](#)

Warning:

Shopify templates are based on liquid code, so you might need to know liquid code in order to edit these templates. **When in doubt, ask your developer before making any changes** – or drop us a line at help@takoagency.com. We can create a custom email template just for you that'll carry your branding all the way through the customer experience.

If you'd like to try it yourself, here's how to do that.

To customize an email template:

Step 1. Select the email template you want to customize.

The screenshot shows the Shopify Admin interface under the 'Notifications' section. On the left, there's a sidebar with links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, and Apps. Below that is a 'SALES CHANNELS' section with 'Online Store'. At the bottom left is a 'Settings' gear icon. The main area has a 'Search' bar at the top. Under 'Notifications', there's a heading 'Customers notifications' with a note about automatically sending notifications to customers. A red arrow points from the text 'Select the email template you want to customize.' to the 'Order confirmation' link in the sidebar. The 'Order confirmation' link is highlighted with a red box. To its right is a detailed description of the template: 'Sent automatically to the customer after they place their order.' Below this are other notification types like 'Order canceled', 'Order refund', etc., each with a brief description.

Step 2. Customize template for email or SMS.

You have the option to customize some aspects of the email by using liquid variables which can be seen in the right sidebar of the template.

The screenshot shows the 'Order confirmation' template editor. At the top, there are tabs for 'Email' and 'SMS', with 'Email' selected. Below that are sections for 'Email subject' containing 'Order [[name]] confirmed' and 'Email body (HTML)' with some liquid code. To the right, there's a 'Liquid variables' sidebar with a red border. It contains a heading 'Liquid variables' and a note: 'You can use liquid variables to output an accent colour and logo image in your templates. The available variables are:' followed by a list: '• {{shop.email_logo_url}}', '• {{shop.email_logo_width}}', and '• {{shop.email_accent_color}}'. At the bottom of the sidebar, there's a link 'Read more about using liquid variables in notification templates'.

However, before making any changes with liquid variables, we strongly suggest you study up using Shopify's resources: [Shopify variables](#)

When you are done, you can see a preview by clicking either the "Send test email" or "Preview" links.

The screenshot shows the "Notifications" section of the Shopify admin. Under "Order confirmation", the "Email" tab is selected. It includes fields for "Email subject" (containing "Order {{name}} confirmed") and "Email body (HTML)" (containing liquid code like "% capture email_title %"). Below the body, there is a note: "Hi {{customer.first_name}}, we have received your order. Your invoice will be sent".

Legal

URL </admin/settings/legal>

There are a few legal items that also need to be addressed within your store: refund policy, privacy policy, terms of service, and shipping policy. You have two main options here: either copy and paste in your own text from elsewhere (such as your attorney) or you can use the templates provided by Shopify. If you select to use the templates, note that you must customize them for your store.

The links for each of these policies are displayed only in the footer of the checkout page by default.

The screenshot shows the "Legal" page in the Shopify admin. It includes sections for "Legal pages" (with instructions to create your own or use templates) and "Refund policy" (with a note about a 30-day return policy). The sidebar shows navigation links like Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, and Online Store.



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