



Launch Guideline

Your guide to launching on Shopify Plus

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Overview

Shopify Plus is the same robust core platform that powers over a million Shopify merchants, but with more customization possibilities, a higher level of dedicated service and support, and features for high-volume merchants.

The launch process has many moving parts. This document is a guide through the successful launch of a Shopify Plus store. Please note:

1. **There is no perfect order to complete launch tasks.** The different sections of this document don't have a strict order and will often overlap.
2. **This document is not exhaustive.** You will need to adjust the list based on the specifics of your project.

Where to find help

Launch Engineer

Your Launch Engineer is a Shopify Plus platform expert who has helped many businesses migrate and set up on Shopify Plus.

As your primary point of contact during the launch phase of your journey, your Launch Engineer is here to help you get acquainted with our platform & ecosystem, team, and the resources available to you to ensure you maximize the value you are getting from your choice to include Shopify as part of your entrepreneurial success.

Whether it's helping your team navigate through the Shopify platform and ecosystem, advising on best practices, providing an understanding of the Shopify-centric tasks to be completed through the launch phase, or just preventing future problems by being proactive; your Launch Engineer will be here to help you every step of the way.

For more information on how you can best work with your Launch Engineer please refer to our [Welcome Package](#).

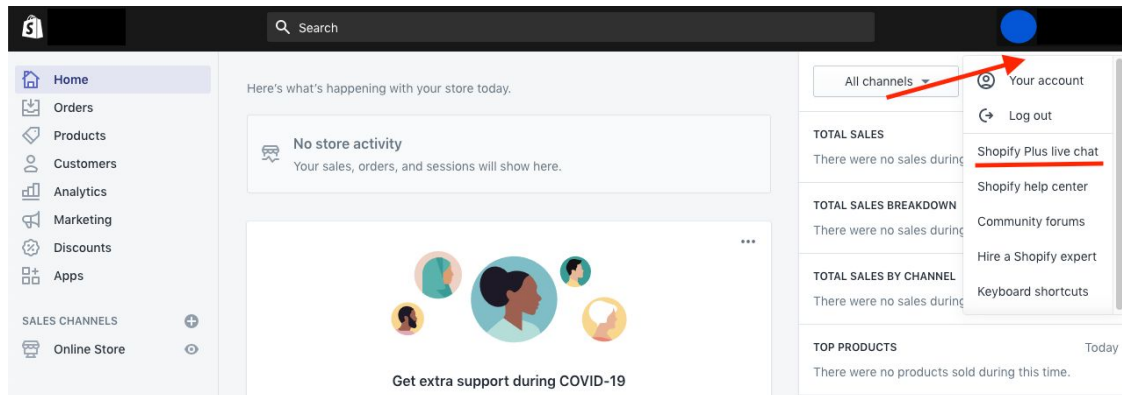
24/7 Plus Priority Support

If you experience any difficulties with one of the tasks listed below or would like someone to walk you through one of them, feel free to call or email our Plus Specialist team - you can even start a live chat directly from your admin.

✓ **Phone** - 1-888-997-5221 | UK +44 8000119061 | AUS +61 390204564

✓ **Email** - plusspecialists@shopify.com

✓ **Live Chat** - in your admin, click your avatar in the top right, then "Shopify Plus Live Chat"



Signing up for the [Shopify Plus Facebook Community](#) group is a great spot to interact, crowdsource ideas, and engage with other Shopify Plus merchants.

You also have access to our [Shopify Plus Academy](#) where you can access Plus exclusive courses.

For weekly updates on Shopify Plus, sign up at this [link](#).

Partner Program

The Shopify Partner Program is a diverse group of designers, developers, marketers, and affiliates who use the Shopify platform to build ecommerce websites, themes, and apps.

Our Partners are divided into different specializations/programs:

[Shopify Plus Partners](#) are leaders within the eCommerce community and can provide a wealth of services from website design, handling the data migration, creating custom apps for unique shopping experiences or integrations with outside services like ERPs. They understand the modern requirements of merchants and clients and work exclusively with Plus merchants and typically large, global enterprises and brands to deliver the best service and experience.

- [Service Partners](#) Service partners help migrate, build, integrate, and grow your business.

If you are looking for an Agency or Service Partner, your Launch Engineer can help you to find the best suitable recommendation for you based on your requirements, scope and budget.

- [Shopify Plus Certified App Partners](#) - designed to reduce complexity in your business so you can focus on growth, these certified third-party apps work seamlessly with Shopify Plus.

If you are interested in any of the Apps offered by our Certified App Partners, and would like to request a demo or speak to them directly, your Launch Engineer will be able to connect you with their point of contact.

[Shopify Experts](#) can work with both Shopify Plus and Shopify Core merchants, but typically offer fewer services. Experts can do jobs falling under one of these categories:

- Marketing and sales
- Store setup
- Development and troubleshooting
- Visual content and branding
- Content writing;

as well as finding an expert for a small tasks/job, such as setting up your Google Analytics or having your SEO setup.

If you are considering hiring a Shopify Expert, it is best to start by visiting the [Shopify Experts](#) page and navigating through the options to find your best match.

Migrating data

The migration of your data is a key component of the launch process. The first question you need to address is what assets do you want/need to migrate. Does this include Products, Customers and Historical Orders? Do you have any Gift Cards, Gift Certificates, Store Credits or Discount Codes that need to be migrated?

There are a few options in order to proceed to the data migration listed below. In this section we will address the migration of Products, Customers, and Orders. For discounts and Giftcards, you will need to leverage the [Discount API](#) to migrate discounts and you will need to use our Giftcard API to migrate Giftcards.

Note: The order of the data import is important

The order in which you import your products, customers, and orders is important. To ensure the orders you import, dynamically link to the products, you should import products, then customers and then historical orders. This is true for API import, when using the Transporter Tool and when uploading individual csv files.

To discuss any of the below methods in further detail please speak to your Launch Engineer and refer to our [Fast Data Migration to Shopify Plus guide](#).

Import Store App

Shopify's Import store app lets you import your product, customers, and orders data to a Shopify store. You can refer to [this guide](#) for more information.

Transporter Tool

Shopify has created a powerful migration tool exclusively for Shopify Plus merchants called Transporter. You can use the Transporter Tool to migrate Products, Customers, and Orders. You can find detailed information in our [Help Documents](#). Essentially, the process is very similar to manually importing CSVs into Shopify; however, by leveraging the Transporter app and CSVs, we can import more detailed information at a highly accelerated rate and with better error reporting for easy troubleshooting. The current process for using the Transporter app is as follows:

1. Extract data from the old platform natively (ex. export as CSV within Magento) or through a custom-built extraction tool.
2. Download the [command line tool](#) and transformation script from the Github repo that will “transform” the data into a Shopify CSV. Alternatively, if the command line tool is too technical or not adapted for your data, you can manually map the fields from the exported CSV to the Shopify CSV template. You can find samples of the CSV files template [here](#).
3. Install the Transporter tool from the [App Store](#) onto your store and use it to upload the Shopify CSVs. More information and instructions [here](#).

CSV files

This is the standard Shopify CSV migration. It allows you to import Products and Customers only. You can find all the information about our CSV templates for [products here](#) and for [customers here](#). Orders can only be imported to the admin via our API or by using the [Transporter Tool](#). That being said, [there are several apps](#) that allow you to upload a CSV file with your orders, map the fields and then will push those orders to Shopify via our API (their services come at an additional cost).

API

You can use our API to import your historical data into Shopify by building a [private app](#) and leveraging the following API:

- [POST Product API](#)
- [POST Customer API](#)
- [POST Order API](#)

Third Party Services and Partners

You can opt to use a third party service such as [Cart2Cart](#) to conduct the migration. If you want to learn more, your Launch Engineer can put you in touch with them in order to get a quote. You will need to provide the number of products, customers and historical orders you

will be migrating from your current platform to Shopify to get a quote. Cart2Cart can also migrate content (blogs, pages etc), discounts and gift cards as well as creating 301 redirects.

Creating Discounts and Gift Cards

Creating Discounts

To manually create discounts, navigate to the [Discounts](#) section in the Shopify Plus admin. There, you can create regular [discount code](#) based promotions but also [automatic discounts](#). More details on how to set up discounts [here](#). You can also utilise our [Discount API](#) or leverage one of these [third-party apps](#) to create discounts in bulk.

Using Scripts for Complex Discounting

If you have more complex requirements, you can use the [Script Editor app](#). Scripts are small pieces of code, written in Ruby, that let you create personalized experiences for your customers in their cart and at checkout. There are three different types of Shopify Scripts:

- **Line item scripts** affect line items in the cart and can change prices and grant discounts.
- **Shipping scripts** interact with shipping, and can rename, show, hide, or reorder shipping methods and grant discounts on shipping rates.
- **Payment scripts** interact with payments, and can rename, show, hide, or reorder payment gateways.

You can find more details on how to use it [here](#). Some additional useful links to help you with the Script Editor:

- [Example Scripts](#)
- [Ruby Documentation](#)
- [Playwright](#) - a simple interface to manage discounts, promotions and pricing for your Shopify Plus store using Shopify Scripts (comes at an additional fee)

Creating New Gift Cards

Gift Cards can be [manually added within the admin](#) or created using the Plus exclusive [Gift Card API](#). Please contact your Launch Engineer to have this feature enabled. Keep in mind that when a Gift Card is created via the API, the Gift Card number will be encrypted, with only the last 4 digits visible. If you need to maintain a record of each GC number and its details, you will need to leverage an external database. A few more important points regarding Gift Cards in Shopify:

- Gift Cards cannot be deleted only disabled
- If a Gift Card is disabled it cannot be re-enabled and you cannot use the same code more than once

- If your Gift Cards are attached to customer email addresses you must let your Launch Engineer know so they can disable the automatic Gift Card notifications

Note: Gift Cards offered on the Online Store are digital Gift Cards sent via email to the email address entered at checkout. The customer buying the digital Gift Cards can either enter the giftee email address directly or enter their own and forward the email they receive with the Gift Card information.

Using Launchpad for Promotions

You can use the [Launchpad app](#) to schedule promotions. This tool is particularly useful if you have multiple promotion campaigns that you would like to schedule in advance. The app discounts the products directly using the “compare at price” field so the displayed price is already discounted and no discount code is required at checkout

Organizing your Data

Collections

Once you have successfully migrated all your products, you will need to organize them into collections. There are two types of collections: [manual collections](#) and [automated collections](#). We would recommend using automated collections rather than manual collections as they are dynamic and products will be automatically added/removed depending on the rules you have set up.

Tags

Tags are the most versatile way to organize your data on Shopify. They have many applications:

- categorizing and grouping related products
- store search and filtering
- creating [automated collections](#)
- segmenting customers

Tags are searchable in the Admin and are accessible in Liquid, Flow and Shopify Scripts.

Before you begin, it is critical to establish your tag strategies so they can be used effectively and remain manageable. Tags have a 255 character limit. Products have no tag limit on Shopify Plus while collections have a 1000 tag limit. While you can actually add more, liquid will only return 1000 tags per collection.

Resources

- [Tag format and guidelines](#)

- [Creating and using tags](#)
- [Filter collections with product tags](#)

Navigation

When you're setting up your online store, you should think about how you want customers to find your products and information about your business. This will help you to make decisions about your online store navigation and your new build. You can find out more about your [navigation here](#) and a video on how to set up drop down menus [here](#).

Setup Pages

If you would like to set up an FAQ page for example (or any page with some text content), you can do so by following [this tutorial](#). Using [Alternate Templates](#) in your Theme allows each page to have a unique look and feel. If you have a lot of custom pages and are looking for an easy way to update them or create new ones, you can always look at a [page builder app](#) that will allow you to easily create completely custom pages without requiring any technical skills.

Design

You can browse our [theme store](#) to find the perfect look for your store. Each theme that is listed in our theme store goes through a thorough quality check and if listed, has been approved by Shopify. When choosing a theme, pay attention to the features (How does the navigation work? How is the product page laid out? Does it offer infinite scroll? Can I add color swatches? etc). Every theme on the theme store has a list of features, a live demo and can also be previewed in your store for free. More info on how to preview a theme for free in your store [here](#). Once you have chosen your theme, you can start customizing it by adding content, pictures etc. Here are some useful resources:

- [Choose themes](#)
- [Change the Layout](#)
- [Shopify Help Videos](#)

Custom build

You can grab paid or free themes from the Shopify marketplace and apply them to your store for a quick change or as a template to add custom features to. Alternatively, if you are an adventurous type, you can opt to build a theme of your own starting from nothing in order to have the most control of the appearance and functionality of your store. Note: There are downsides with crafting a theme from scratch. First, anything that's built custom and made just for you is likely going to be a larger investment in either cost, time or both. A pre-built Shopify theme can be installed with a few clicks, but coding a theme means a lot more time devoted to communication, design approvals, the design process, testing, and

implementation. If a custom build is the direction you want to take, you can refer to [this documentation](#).

Checkout.liquid

As a Plus merchant, you have access to the checkout.liquid layout however this is not enabled by default on your store. If you would like to customize the checkout.liquid layout, please contact your Launch Engineer or the Plus Support Specialist team so they can enable access to it.

Once checkout.liquid has been enabled for your store it will allow you to make changes to the checkout. It is important to keep in mind that we are constantly working to upgrade the checkout experience and as such the base coding of the checkout will change over time. This means certain changes and code you add to the checkout (specifically code that renders HTML) may also need to be updated in conjunction with our improvements to the checkout. You are still completely free to make modifications to the checkout, however please be aware that we will also be working towards the same goal of optimizing the checkout and ultimately improving conversion rates for everyone!

As checkout upgrades are released, a Home Card notification will appear in your admin to remind you to upgrade to the latest stable version of checkout. You will have 30 days to complete each upgrade.

To gain access to the new features we release, you may either remove your checkout customization or upgrade to a new stable version of checkout. The stable version of checkout will need to be upgraded 3 to 4 times a year to be compatible with the latest checkout features. If upgrades are not made within 30 days, you will default to the non-customized Shopify checkout.

Headless Commerce

Trends change as fast as the technology that powers them. With [headless commerce](#) we're giving your development team the freedom to work in parallel as they update your storefronts. Headless commerce references the architecture that underpins a commerce solution where the front-end and back-end operate independent of one another.

Developers can build out your storefront using an external software and the [Shopify Storefront API](#) to deliver things like products, blog posts or customer reviews to any screen or device, while front-end developers can get to work on how to present that content using any framework they desire.

Use cases for headless commerce include increased personalization, internationalization and increased control over integrations and the shopping experience.

Important note - If you're thinking about using a headless approach for your store please discuss this with your Launch Engineer to ensure it's the right solution for your business.

Apps

Shopify provides what most merchants need most of the time to successfully run their Shopify stores. If a merchant needs specific functionality, the Shopify ecosystem includes access to third party apps for specialized tools with additional value add-on functionality.

We would advise you to install and set-up your apps early enough in the launch process so that you have enough time to test them thoroughly. Most apps from our [app store](#) offer a free trial period - so when in doubt, don't hesitate to test multiple apps for one same feature in order to test them and choose the one that fits your business needs the most. As a gentle reminder - please don't forget to uninstall any app that you won't be using as you will be charged automatically at the end of the trial period. Also, once you have uninstalled any unwanted apps, **please remember to remove any unwanted code that might have been left on your theme.**

Plus Exclusive Apps

[Flow](#) is an automation app that allows you to automate tasks and ideas within your store and [across your apps](#), without needing coding skills. Flow helps you reclaim your time and focus on growing your business. [Flow in Shopify App Store.](#)

[Launchpad](#) is a scheduling tool allowing you to schedule, coordinate, and execute events, such as sales, product drops, and inventory restocks with a defined start and end time. [Launchpad in Shopify App Store.](#)

[Scripts](#) are small pieces of code that let you create personalized experiences for your customers in their cart and at checkout. You can write, edit, manage, and publish scripts using the Script Editor. The Script Editor provides templates to help you write scripts and a debugger to help you test them. [Script Editor in Shopify App Store.](#)

Integrations

Shopify Plus is typically only one component of your business. It's crucial to integrate it properly with the rest of the business tools you're using. Whether your tech stack involves an ERP, a 3PL, a CRM, or an email marketing software, there are three different ways to approach each integration.

Apps / Existing Integrations

Certain solutions have already built their own app to connect their software to Shopify and published it in the Shopify [App Store](#). We also have a [Shopify Plus Certified App Program](#) which are our top recommendations for enterprise solutions.

Sometimes, an app for a certain integration is available for Shopify but is not published on the Shopify App Store. To find these apps use a quick Google search or ask the service provider directly since they don't always advertise their integration with Shopify. If unsure of any third party integration or app, please speak to your Launch Engineer.

Connectors

If you are working with an ERP like NetSuite, Microsoft Dynamics, or SAP you might be interested in leveraging a Connector. The advantage of Connectors is that they are typically a hosted, easy to configure, "turn-key" solution. However, they typically come with a monthly cost.

These companies offer connectors and custom integrations for a wide variety of ERPs:

- [Celigo](#)
- [VL Omni](#)
- [Codeless Platforms](#)
- [Fisher Technology](#)
- [nChannel](#)
- [FarApp](#)

Custom Integrations

Finally, you can always build a custom integration using our [API](#). Feel free to reach out to your Launch Engineer with questions about Shopify's API. If you plan on using any of the [Plus-only APIs](#), you will need to send your Launch Engineer the API key of your private app so that they can grant you access to that specific API.

Note: Shopify uses [API versioning](#) as a reliable way to release valuable updates to the platform. API versioning allows Shopify to continuously evolve the platform while offering third-party developers a predictable path for feature upgrades and deprecations.

To ensure you always know about upcoming API changes, follow the Developer [Changelog](#).

Sales Channels

You can use Shopify to sell your products on different online sales channels. Sales channels represent the different marketplaces where you sell your products. By connecting each sales channel to Shopify, you can keep track of your products, orders, and customers in one place.

Available Sales Channels* include:

- [Shopify Plus Wholesale](#)
- [Amazon](#)
- [eBay](#)
- [Facebook](#)
- [Instagram](#)
- [more](#)

If your store is not eligible for a sales channel, then the channel appears as **unavailable** in your Shopify admin. Click 'You can't add this channel' to see why your store isn't eligible and speak to your Launch Engineer for an alternative solution.

POS

This sales channel allows you to connect to your shop's existing product and client information to power a robust Point of Sale terminal to sell in person. Whether setting up pop-up shops at events, line busting during busy periods with customers on an iPad or managing your brick and mortar locations entire sales experience through our POS system - this easy to use sales channel is a great way to sell wherever you connect with potential buyers.

We have an assortment of POS hardware to complete your setup like cash drawers, barcode scanners and more available [here](#). Our Plus merchants can receive an exclusive discount on all purchases; contact your Launch Engineer for more information!

Note: Shopify POS hardware is not compatible in all countries/regions but [external card-readers](#) can be used.

**More online sales channels are available for Shopify from third-party developers and can be added in the Shopify App Store. If you need help using a sales channel developed by a third party, then the best place to start is by contacting its creator's customer support.*

Wholesale

There are two main methods for selling wholesale on Shopify Plus: using the Wholesale channel, and creating a wholesale-specific expansion store.

[The wholesale channel](#) enables you to easily expand your business by creating a turnkey password-protected storefront for your high-volume buyers. It can be set up in the same B2C store, and all your wholesale customers and orders will be trackable under your current store admin. You can create customer groups that allow you to control preferred pricing and product assortment for each type of buyer.

Pricing can be set as a percentage discount on all products, different percentage discounts on specific collections, or an individual product price list with volume-based discounting. You can also set a minimum order amount required on the wholesale store as a whole, or per customer. If you want to keep your B2B and B2C separate, you could also install the wholesale channel in an expansion store.

While this channel allows you to quickly create a wholesale buyer experience through a separate storefront, it is limited in frontend customization. There is also no built in API, so it can't integrate with any external systems or third-party apps (with the exception of shipping apps that provide shipping rates at checkout if the option for "Use the same rates as Online Store" is selected). If more flexibility is needed, then perhaps a wholesale-specific expansion store would be a more suitable option. Reach out to your Launch Engineer for a more in-depth discussion around the different options.

Before you begin, it's crucial that you explore your B2B requirements and take a deep dive into the wholesale operation. Some top questions to consider:

- How do you currently take wholesale orders? Phone? Fax? Email? Online?
- How do you come up with pricing for your wholesale customers? And does it require frequent updates?
- How do your wholesale customers pay? Terms? Immediately? Are you storing customer payment details somewhere?
- Do you charge your wholesale customers shipping? Are you using a 3PL to handle warehousing or logistics?

Organization Management

The [Shopify organization admin](#) is an enhancement to the standard Shopify admin. It lets you operate as an organization by managing tools that affect multiple stores at one time. Users that have been granted access to the Shopify organization admin can take actions that control users, stores, and Flow workflows across your entire organization.

- [Users](#)
- [Stores](#)
- [Flow](#)

Expansion Stores

If you want to process transactions in multiple currencies, cater to different regions, have a separate store for your wholesale business or simply set up a test environment, you will need to create an additional storefront.

You can add new stores and administer existing stores within the Shopify organisation admin. Once a user has been granted access to the Plus Admin with the *Stores* permission, you can simply login to Shopify Plus and access Stores from the main navigation on the left hand side.

Creating an expansion store

1. From the Shopify Global navigation sidebar, click **Stores**.
2. Click **Add store**.
3. Select a reason in the **Purpose of this store** dropdown.

Please note that even though your stores will be under the same Plus contract, they are individual and separate entities. This means that changes made to one store won't be reflected in the other. The information doesn't sync between stores and you will have to either apply changes manually or use a third party system or [third party app](#) to sync inventory for example.

We have an expansion tool that is used internally and that can help you duplicate the content of one store to another. That tool can export the following: **Products, Collections, Metafields, Pages, Blogs, Articles, Customers and Themes**.

Note that we can't copy:

- **Orders**
- **Navigation** - we can't move over your menus and the structure of the store, this needs to be set up manually
- **Apps** - you will need to download apps individually across each store
- Any detail that's in the '**settings**' section of the admin - here we are talking about tax, shipping, email notifications, payment gateway, files etc.

Note: The expansion tool is used as a one off cloning experience and cannot overwrite data. This operation can take some time depending on how much data is moved from one store to the other, so you should take this into account in your timeline.

Settings

An important step of the migration to Shopify is to set up and review your account settings in your Shopify admin. This section will help you understand each setting and allow you to assess if everything is ready for launch.

General

In the General settings, you can choose the store country, currency, units of measure, time zone, store name etc. It's important to review each point - they are [all listed on this page](#) with instructions for each one.

Customer Email Best Practices

This [document](#) highlights how to add Shopify's SPF record to your DNS settings in order to avoid email notifications being flagged as spam or having the email provider display "[via Shopify](#)" in the sender note.

Payment Providers

In this section, you can select the different payment methods to offer. Each country supports a specific list of payment gateways - you can find the list of supported gateways per country by visiting: <https://www.shopify.ca/payment-gateways/>[enter your country here].

The main Payment Gateway on your store (ie. Shopify Payments, Authorize.net, PayPal Payflow Pro, etc) allows you to accept credit card payments - note that if you are not using [Shopify Payments](#), you will be charged an additional [transaction fee](#) specified in your Shopify Contract.

You can also enable [PayPal Express](#), [Amazon Pay](#) or other [alternative payments](#) (Klarna, Affirm) or [manual payments](#). If you are using a supported gateway, you can also use one of our [accelerated checkout options](#): Shopify Pay, Apple Pay and Google Pay.

The Payment Provider section is also where you enable to either automatically capture payments or to manually capture them - more information on that topic can be found [here](#).

Checkout

This is where you can set up the checkout flow. For example, you can decide whether you will fulfill orders automatically, what customer information is mandatory at checkout, or if customer accounts are optional. Instructions and details on how to set this up can be found [here](#).

Shipping

Shopify offers a few different ways to set up your shipping methods. You start by choosing where you want to ship - [Shipping Zones](#) - and each zone is allocated a number of different rates. You can offer:

[Free shipping](#)

[Flat rate shipping](#)

[Calculated shipping rates](#)

Calculated rates allow you to pull the rates directly from the following carriers: USPS, Canada Post, UPS, FedEx and DHL Express. Note that restrictions apply - learn more about that [here](#). It's also important to ensure that your "Shipping From" address is correct and that all the

products and variants have a weight if you plan on using the calculated rates. Find out more about Shipping in Shopify [here](#).

If you have more complex shipping requirements, using the [Shopify Script Editor](#) can help since it allows you to conditionally hide/display certain rates, re-order rates etc. (more details [here](#)). If your shipping requirements can't be met using the Script Editor, then you can look at a [third party shipping app](#).

Taxes

Shopify has a built-in tax system that can calculate taxes automatically depending on the customer's address and your business locations added to the location(s) in the [tax section](#).

Shopify Plus merchants can also access [Avalara Avatax](#). More information on setting up and activating Avalara Avatax can be found [here](#). You can either create a new account or connect an existing account. Questions about the Avalara setup should be directed to Avalara directly. Note that once you have connected Avalara to Shopify, all orders except for [test orders](#) will be synced with Avalara. This applies to orders imported via the API.

Locations

This feature allows you to allocate inventory to various locations, helping fulfill your orders more efficiently. You can read more about this feature [here](#) and watch a [video series here](#).

Notifications

Shopify automatically sends notification emails to customers after specific transactions/events: a new order, an order fulfillment, account creation, etc. You can customize each one of these notifications by modifying the templates listed and reviewing the notifications that you will be receiving in the [Notifications section](#).

Note: Plus Merchants can request to have Plus Specialist Support or their Launch Engineer disable some or all transactional emails sent from Shopify if you prefer to use your own system. Remember that importing data can trigger notification emails unless they are disabled. For example, disabling the “new order notifications” will ensure that you don't end up receiving an email for each order imported into Shopify.

Gift Cards

This is where you manage your gift card settings including expiry settings and enabling Apple Wallet passes. More information [here](#).

Plan and Permissions

You should make sure you add all relevant members of your team to your Shopify store. You can send staff account invites directly from the admin and also give them the appropriate

permissions - [more info here](#). Please note these permissions are different from organization admin users.

Store Languages

This section is where you set your theme language and add translated languages for your store (if applicable). For further information please read through our guide to selling in multiple languages [here](#).

Billing

The billing section is where the billing information for your store can be managed and updated as well as where you can view all your bills. For further information please see [here](#). In this section you can also add a VAT number (EU merchants) and view a finance overview.

Legal

In this section you can add legal pages (ie. refund, privacy policies) that will appear in the checkout of your store.

Online Store Preferences

Nested under the Sales Channel section the [Online Store preferences](#) is where to add the title and meta description that will show up in search engine results, the tracking codes (ie. [Facebook pixel](#), [Google Analytics](#)), where you manage the storefront password, and the reCaptcha for checkout protection.

Marketing and Reporting

Google Analytics

Instructions for connecting your Google Analytics account to Shopify [can be found here](#). Tips and best practices for tracking campaigns in Google Analytics / set up UTM parameters are outlined [in this article](#).

Facebook Pixel

[This link](#) explains how you can set up a Facebook Pixel directly from your admin.

Setting up marketing campaigns

You can create marketing activities from the Marketing page of your Shopify admin and track how they perform, including [Facebook Dynamic Products ads and Google ads](#).

Reports

There are many types of reports available on Shopify, the best way to see if you can pull certain data is to go into the admin and [modify columns and filters](#). Keep in mind that the data in Reports is based on the timezone in Settings - General, and not the location that you're currently viewing the data from.

If you're looking to access and export reports that are not available in Shopify or emailed automatically on a regular basis, we usually recommend [using a third-party app](#). If you are looking for more in-depth Analytics/BI/Data Visualization, we have several [Technology Partners](#) in this space.

Newsletter

Make sure you have set up your newsletter pop up (or sign up field) and that it is successfully connected and passing data to the email marketing system.

Search Engine Optimization Best Practice

Crawl the Legacy Site

By crawling the legacy/old website, you generate a list of all URLs. It will give a good understanding of the website structure and the URLs that need to be redirected. Creating 301 redirects will avoid a 404 event which negatively impact SEO. Creating redirects for URLs with new paths will also ensure a seamless experience for your customers when you go live with your Shopify store. There are few tools that you can use to do so:

- [Xenu Link Sleuth](#)
- [Screaming Frog](#)
- [Integrity for Mac](#)
- [Google Webmaster Tools](#)

All of these tools allow you to export a list of all URLs in a spreadsheet, which will be very useful once you need to take care of the URL mapping and create the 301 redirects.

List Backlinks

External pages linking to a website are crucial for ranking as they send signals to search engines that the site is trusted from that external source. You need to know the pages linking to your website, and where they are linking to. There are again a couple of tools that can be used to perform a backlink analysis:

- [Open Site Explorer](#)
- [Majestic SEO Tools](#)

Alternatively, you could also use Webmaster tools or Google Analytics (referral sources)

One thing to keep in mind for your external links is that referrers are linking to your page using relevant keywords or the actual name of your website rather than a generic word such as 'here' as Google would recognize that for the word 'here' rather than your store.

301 Redirects

Once the product migration is complete and you have all the pages and blogs set up, you will need to create the 301 redirects. This step is crucial in order to ensure a smooth transition and avoid a negative impact on your traffic. You can either import a CSV containing your redirects directly in the admin or set them up manually. More information can be found [here](#).

For any old links that don't have a new direct link, the next best thing is to redirect to the most relevant category/page/content. The last resort is simply linking to your root domain to ensure there are no 404 errors. More on managing 301 redirects within Shopify [here](#), and 301 best practices [here](#).

You might also want to consider installing a [redirect application](#), some offer 404 error tracking in addition to URL redirects.

Customize your 404 page

A good rule of thumb is to customize the text of your 404 page, in case a link slipped through the cracks and a customer lands on a 404 page.

You can easily do that by heading to **Channels>Online Store>Themes>Edit HTML/CSS**.

There, you can find the **404.liquid** template and customize the message that will be displayed in the occurrence of a 404 page.

Pre-launch

Before you go live, there are some final and crucial steps to go over. Please refer to our **Pre-Launch Checklist** to help guide you in these tasks which your Launch Engineer can provide.

Order Flow Check

Before going live, a thorough test of the order flow, from placing orders on the storefront all the way to fulfilling orders, is required.

When placing the orders, test as many scenarios as possible:

- discount codes
- customer logged in
- different payment methods
- different shipping rates

- different shipping addresses (keeping an eye on the taxes being calculated)
- try on desktop and on mobile
- failed transactions.

Once the order is placed:

- look out for that order confirmation email
- test the fulfillment flow (either if it's done manually or through an app or an ERP)
- add the tracking info to a fulfilled order and check the shipping confirmation email
- test a partially fulfilled order
- try to issue a refund and a partial refund.

In other words, try the order flow for any scenario that may occur once you are live. More details on how to deal with orders [here](#).

Keep in mind that to be considered a [test order](#) in Shopify, you need to meet certain criteria: you need to either use the [Bogus Gateway](#) or use [Shopify Payments](#) in test mode. Test orders can be deleted and will not appear in your reports, they also won't sync with Avalara. If you are not meeting the test order requirements, the orders are considered "live" orders by Shopify - even if you are "testing", those orders won't constitute a test order unless you are using the Bogus Gateway or Shopify Payments in test mode.

Please note that it's not possible to test Apple Pay prior to the launch. To use Apple Pay, you need to use Shopify Payments in live mode (not test mode), remove the storefront password and also use the main domain (not the "myshopify.com" domain).

Similarly, a number of third party payment gateways don't have a "test mode" with Shopify and the only way to test them out is to place a live order.

If you place a real order, with a real transaction (that you void/refund and cancel after), keep in mind that the order can be archived but not deleted afterwards and that it could potentially sync with other integrated systems such as Avalara or an ERP/3PL.

Integrations Check

Similarly to the order flow check, you need to make sure your integrations are properly connected to Shopify. Being very meticulous during this testing phase will ensure that you go live with a robust, well-integrated tech stack and avoid surprises down the road. This phase will very much depend on how many apps and other systems you have connected to Shopify.

DNS Settings and Servers Check

It's recommended to discuss the changes that will take place on the day of the launch with your team/Launch Engineer a minimum of three to four weeks in advance. You'll want to know:

- who on your side has access to your Domain Registrar
- which Domain Registrar you use
- if you use any hosting services (such as AWS), and if you do, do you plan on using them after you switch to Shopify
- if you use any sort of DNS Management System or Proxy Service (such as CloudFlare) as some of them are not compatible with Shopify.

Making sure you iron out who will change what in terms of DNS settings prior to the launch is critical to ensuring a smooth launch.

Preparation

About a week prior to launching, we recommend logging into your domain registrar account and changing the TTL Value to the lowest value that the domain host will allow (normally 300 sec). This is to ensure that when you update the DNS settings on the day of launch, it will propagate as quickly as possible.

It's also recommended to take the necessary measures to lock down your previous store when you are making the DNS changes (build a landing page with a message for customers for example). That way you make sure that while the DNS changes are propagating, customers can't keep placing orders on the old system. That being said, how you manage this transition is totally up to you.

SSL Certificate

Shopify provides its own [SSL certificate](#). An SSL certificate bought through any other provider will not work with Shopify. The SSL certificate provided by Shopify doesn't come at any additional cost. It's also possible to order an EV SSL certificate after the launch - this is done directly from the admin, under '**Online Store > Domains**'. Note that you can only order one free EV SSL certificate per store. If you order more than one, it will come at an additional cost.

Backing Up Data

Shopify does not locally back-up merchant data. If someone deletes all the products or themes from a Shopify store, this information is lost unless you are backing-up that data. It's highly recommended for merchants to either regularly [manually back up](#) a store's data or to [use a third party app](#). This is especially important when you have larger teams. If you (or someone on your team) ever delete data by accident and you don't have a backup, contact Shopify Support immediately. We can sometimes restore some of the deleted data, but it's extremely time sensitive (within an hour since deletion) and not guaranteed.

Go-Live

DNS Settings

- Change the A Record of your root domain and point it to Shopify's IP address:
23.227.38.65
- Change the CNAME Record of your subdomain (www.) and point it to:
shops.myshopify.com
- Connect your domain in Shopify - [instructions here](#)
- Set your primary domain in Shopify - [see how here](#)
- Make sure you remove your storefront password - [you can find instructions here](#)

Post Launch

Customer Account Invitations

In the majority of cases when importing customer data you can't create accounts in Shopify since the passwords are encrypted and won't migrate over. As a result, a customer record is created in Shopify rather than a customer account (where they can log in and check their order history). The [Bulk Account Inviter](#) is a Plus exclusive app that will allow you to send those customers an email to easily prompt them to reset their password and activate their accounts.

Speak to your Launch Engineer or the Plus Specialist Support team and they can install the Bulk Account Inviter app for you. You can find all the details on how to use it [here](#). This app will need to be used after launching your store(s) to invite customers to re-activate their existing accounts. Before the launch, you can customize the email template that will be sent out and run a few tests internally.

Submit sitemap to Google Console

Once you have launched and you are live on Shopify, it's a good rule of thumb to re-submit your sitemap to Google. You can find all the [instructions here](#).