Launch Process

Overview

The launch process is made of a lot of moving parts. I have put together a list of the different tasks you should complete before going live but I would like to bring to your attention on a few points:

1. Those steps don't necessarily have a strict order and most of the tasks usually overlap.
2. The lists below is generic and you will need to re-adjust priorities and tasks during the launch process and according to your needs.
3. The following list is not exhaustive and depending on the specificities of your situation, you may need to add certain elements to the list or skip certain tasks.

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Launch Checklist

Data Migration

The data migration is definitely one of the most important part of your launch. The first question you will need to address is what will you bring over? 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 multiple ways to import your data to Shopify. The data migration is probably one of the most time consuming task so I would recommend to start working on it as soon as possible and work and other tasks concurrently.

CSV files
You can find all the information about our CSV templates for products here and for customers here. As you may know, orders can only be imported to the admin via our API. That being said, an app such as OrderImp allows you to upload a csv file with your orders, map the fields and then will push those orders to Shopify via our API (their support is not always the best but it can save you some time). The order of the data import is important: you should start with products, then customers and finish with historical orders.

API
You can use our API to import your data into Shopify. In that case, you would need to build a custom app and leverage the following API:
- POST Product API
- POST Customer API
- POST Order API

The order of the data import is important: you should start with products, then customers and finish with historical orders.

3rd party service/partner

You can use a 3rd party service such as Cart2Cart to proceed to the migration for you. I can contact them and ask for a quote but I would need to know how many products, customers and historical orders you will be migrating from your current platform to Shopify.

Organizing your Data

1. Collections

Once you have successfully migrated all your products, you will need to organize them into collections. There are 2 types of collections: manual collections and automated collections - videos here. I would recommend using automated collection rather than manual collection as they are dynamic and products will be automatically added/removed depending on the rules you have set up.

2. Navigation

Your navigation is basically the menus/links that you will be displaying on your storefront. To set that up you need to click on Online Store/Navigation. You can find out more about your navigation here and a video on how to setup 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. Having a Contact Us page is usually a good rule of thumbs and you can easily put it together by following these instructions.

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 works?

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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, has 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:

- https://help.shopify.com/themes/customization
- https://help.shopify.com/manual/using-themes/change-the-layout
- https://help.shopify.com/videos

As a Plus merchant, you have access to the checkout.liquid layout but it's not enabled by default and if you would like to customize the checkout.liquid layout, you should contact me so that I can give you access to it.

Once I've added the checkout.liquid layout to your theme, it will allow you to make changes. 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, I just want to make sure you're aware that we will also be working towards the same goal of optimizing the checkout and ultimately improving conversion rates for everyone!

We have recently launched a monthly checkout review and in order to make sure that your customizations are compatible with the latest features we build, such as Shopify Pay, you must manually test and upgrade your checkout.

To gain access to new features, 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 every 30 days to be compatible with the latest checkout features. If upgrades are not made within that time, you will default to the non-customized Shopify checkout.

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If you decide to continue customizing your checkout, complete the Checkout Preview & Upgrade process for each store every month with the following steps:

- Go to your admin and look for below home card notification that says 'To keep your checkout customizations, upgrade your checkout'. The date noted will change for each upgrade. Click 'Upgrade checkout'.
- Review changelog to read about upgrade guidelines and newest features.
- Preview checkout and select a published or unpublished theme to preview what your checkout would look like under the latest stable version.
- Complete a test order within preview. If errors occur, it will be up to you and your team to review your checkout theme files and adjust before upgrading.
- If no errors occur, upgrade checkout.

Each month, another home card notification will appear to remind you to upgrade to the latest stable version of checkout. You will have 30 days to complete each upgrade.

Discounts

If applicable, create the necessary discount codes - [see how here](#) - and/or promotions. You can use the [app Launchpad](#) to schedule promotions on your store. The main difference between the 2 is that with discount codes your customers will need to enter a code at checkout where the Launchpad app discounts you products' price directly (so no discount code require at checkout, the price is displayed already discounted).

Apps

You should install and setup your apps early enough 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 install multiple apps for one same feature in order to test them and choose the one that fits your business needs the most. 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.

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Integrations

Falls under integrations any system that you need to connect to Shopify and that doesn't have an existing app built out (ERP, 3PL, CRM, etc.). You can learn more about our [API here](#) and don't hesitate to reach out to me for any technical questions regarding the integration. If you need to use any of the Plus only APIs (Gift Card API or User API), you will need to send me the API key of your private app so that I can give access to that specific API.

Settings

One important part of migrating to Shopify will be to review all your account settings in your [Shopify admin](#).

- Store Options
In your general settings, you can choose your 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 of them.

- Customer Email Best Practices
Not mandatory but it's a good idea to review [this document](#).

- Payment Gateway
In that section, you can select the different payment methods you would like to offer to your customers. At the moment you have Shopify Payments and PayPal Express. That's also the place where you decide to either automatically capture payments or to manually capture them - more info on that topic [here](#).

- Checkout
That's where you decide of the checkout flow - will you fulfill orders automatically? What customer information is mandatory to checkout? Are customer account optional? Instructions and details on how to set this up [here](#).

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- Shipping

This section is dedicated to your shipping options: where you ship (shipping zones) and what rates you offer for each zone. You can find out more here.

- Taxes

You will need to set up your taxes in that section. Shopify has a built-in tax system that can calculate taxes automatically depending on the customer's address and where you have business locations. You would just need to add this/those location(s) in that tax section - more details here.

- Notifications

Shopify automatically sends notification emails to your customers after certain events such as : a new order, an order fulfillment, account creation etc. You can completely customize each one of these notifications by modifying the templates listed in that section - more information on how to do that here. Also review the notifications that you will be receiving - details here.

- Staff Accounts

Make sure that members of your team have a staff account set up and that you have given the appropriate permissions - more info here.

Marketing and Reporting

- Google Analytics

Make sure to connect your Google Analytics account to Shopify - instructions here.

- Facebook Pixel

You can also set up your Facebook Pixel directly from your admin - follow this link to see how.

- Newsletter

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

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Before the launch

1. 301 Redirects

When all your products are in Shopify and you also have all your pages set up (contact us page, about us page, etc), you will need to set up your 301 redirects. I've attached a document that highlights best practices in terms of 301 redirects.

2. Thorough Order Flow Check

You need to thoroughly check the order flow end to end. This means from placing the order on the storefront until the fulfillment. When placing the order, test as many scenarios as possible (discount codes, customer logged in, etc), try different payment methods, shipping rates, different shipping addresses (keep an eye on the taxes being calculated), try on desktop and on mobile, try successful transactions but also 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](#).

3. Integration(s) Check

Similarly to the order flow check, you need to make sure your integrations are connected to Shopify properly. Being very meticulous during this testing phase will ensure that you go live with a robust integration and no bad surprises down the road.

4. Set up clone stores

If you want to process transactions in multiple currencies, have a separate store for your wholesale business or simply set up a sandbox environment, you will need to create an additional storefront. In order to create an additional store, you can follow the instructions below:

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- Create a new store by clicking here: https://www.shopify.com/
- Send me the new store's URL and I'll take care of the rest

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 program to sync inventory for example.

We have a clone 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
- Smart collections
- Pages
- Blogs
- Articles
- Customers
- Themes

Note that we can't move:
- Orders
- Manual collections - so if you set your product collections (= product categories), try to use mostly smart collections.
- Navigation - we can't move over your menus and the structure of the store, you will have to do it twice.
- Apps - you will need to download the apps again.
- Any detail that's in the 'settings' section of the admin - here we are talking about tax, shipping, email notifications, payment gateway etc. Most of those take just few minutes to set up or you can manually copy paste the information.

Note that 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.

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Launch

I would recommend to log into your domain registrar account and to change the TTL to a lower value (like 300 sec) a week prior to the launch. It's just to make sure that when you update the DNS settings the day of the launch, it will propagate as fast as possible.

I would also recommend 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 your customer for example). That way you make sure that while the DNS changes are propagating, customers can't keep placing orders on the old system.

*** [ONLY IF APPLICABLE]***
As you are currently using the ... Name Servers (NS) - you will need to change that and use the default ... Name Servers. There is a step-by-step guide on how to switch to the ... NS here. Note that changing NS can take 24 to 48 hours to fully propagate.

When you are ready to launch, you will need to go ahead and update your DNS settings. You will need to:

- Change the A Record of your root domain ()and point it to Shopify's IP address: 23.227.38.32
- Change the CNAME Record of your subdomain (www.) and point it to: .myshopify.com
- Claim your domain in Shopify - [instructions here](instructions%20here)
- Set your primary domain in Shopify - [see how here](see%20how%20here)
- Check the box "redirect all traffic to this domain"
- Make sure you remove your storefront password - [you can find instructions here](you%20can%20find%20instructions%20here)

Please let me know (preferably with 24 hour notice) when you will make the DNS changes. That way I can monitor the DNS propagation and activate your checkout custom SSL certificate. Just so you know, your checkout is always secure it's just that until I activate your custom SSL certificate for your checkout, your checkout URL will read "https://checkout.shopify.com"

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instead of "...". So by giving me some notice on when (date and time) you will be changing your DNS settings, I can make sure I'll be ready to activate that custom SSL certificate right away. I can do that between 7:00am EST and 9:00pm EST. If you decide to launch outside those time, I will then activate the SSL as soon as I get to the office.

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[FOR MERCHANTS USING GODADDY]

When you are ready to launch, since your domain is hosted by GoDaddy, you have 2 options: update your DNS Records automatically or manually.

1. Automatically:

You can setup your domain automatically with GoDaddy Connect. In order to do that, simply follow the [steps listed here](#).

2. Manually:

If you decide to make the changes manually, you will need to:

- Change the A Record of your root domain (...) and point it to Shopify's IP address: 23.227.38.32
- Change the CNAME Record of your subdomain (...) and point it to: [.myshopify.com](#)
- You also have a [step-by-step guide here](#).

3. After the DNS switch:

- Set your primary domain in Shopify - [see how here](#).
- Check the box "redirect all traffic to this domain"
- Make sure you remove your storefront password - you can find [instructions here](#).

Please let me know (preferably with 24 hour notice) when you will make the DNS changes. That way I can monitor the DNS propagation and activate your checkout custom SSL certificate. Just so you know, your checkout is always secure it's just that until I activate your custom SSL certificate for your checkout, your checkout URL will read "https://checkout.shopify.com" instead of "...". So by giving me some notice on when (date and time) you will be changing your DNS settings, I can make sure I'll be ready to activate that custom SSL certificate right away. I can do that between 7:00am EST and 9:00pm EST. If you decide to launch outside those time, I will then activate the SSL as soon as I get to the office.

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After the launch

1. Submit sitemap to Google Console

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

2. Customer Account Invites

As you may already know, when you import customer data, in most cases you can't create accounts in Shopify as the passwords are encrypted and don't come over. As a result, it only creates customer records in Shopify instead of customer accounts (where they can log in and check their order history). We have built an app that will allow you to send those customers an email very easily to prompt them to reset their password and activate their accounts. I went ahead and installed the Bulk Account Inviter app in your store (you can see it in your app section). You will find all the details on how to use it [here](#). This app will need to be used after you launched to invite your customers to re-activate their existing accounts. But before the launch, you can already customize the email template that will be sent out when you actually invite your customers.

Support

If you experience any difficulties with one of the tasks listed above or would like someone to walk you through one of them, feel free to call into support - +1 (888) 997-5221 - or start a live chat directly from your admin: