

# **Shopify Final Assignment**

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# Chapter 1. Introduction

Welcome to Shopify!

In this guide, you'll learn the basics of opening, customizing and managing your new online store. Shopify provides you with a variety of tools to make your venture into your business easy and customizable.

## **The Pricing Plans**

Shopify offers different pricing plans based on your individual needs as an entrepreneur. Detailed below are what each plan offers. <https://www.shopify.com/pricing>

## Chapter 2. Getting Started

# Chapter 3. Setting Up - Topic Head

## Creating a Store

### Creating a Store

To begin selling, you have to have an existing store. These steps will give you the basics on how to properly set up all the components of your store.

### Setting up the Basics

1. From the Shopify Admin page, go to **Settings**.
2. Click **General**.
3. Locate the **Store Details** section and fill in all the necessary information.
4. Click **Save**.

### Adding Store Policies

Policies are important so that your customers know how you handle refunds, privacy, and terms of service for transactions. Store policies are added on a different webpage, but will be displayed as links at the bottom of the customer checkout page for your store. This requires 2 separate browser tabs to be open.

1. In your Pages page, click Create a New Page
2. In a separate tab, access your store checkout settings. Copy each policy to your computers' clipboard.
3. Back to the first page, paste the clipboard contents. Then click Save Page.
4. Add a link to the policies page so your customers can easily find it.

### Adding and Organizing Products

#### Adding Products

1. From the Shopify Admin page, click on the Products tab to go to the Products page.
2. Click Add Product to begin the process of adding in new products.

3. Enter in the details and logistics for your new product.

## Organizing Products

Shopify allows you to create product collections to organize your products however you'd like through the use of collections. Examples of categories: Clothes for men, women, or children Items on sale Items of a certain type, size or color Seasonal products

1. From the Collections page, click on Create Collection
2. In the new window, enter a Title and Description for the collection. This is a mandatory step.
3. Under Sales Channels make sure to choose which channels you want the collection to be listed under. (I.E. Shopify online store, Facebook, Amazon, etc.)
4. Collections allow you to choose whether products will be added in manually or automatically. This option cannot be changed later.
  - a. If you chose automatically: Add in the selection criteria under Conditions.
  - b. If you chose manually: When adding in products manually at a later time, make sure you click Save after adding them. You can add the same product to several different collections.
5. Click Save Collection

## Customizing Theme

## Completing your Profile

# Chapter 4. Domains

## Adding a Domain

### Domain Through Shopify

Shopify has the ability to host your online store through either a third-party domain or one that's been bought from us.

1. Navigate to the domain purchasing page, on shopify.
2. To see if the domain name you want is available click Domain Search and type the domain in the text box. Click Generate domains to search.
3. If the domain name is available, or an alternative is, choose which one you want, but be sure to look at the yearly price as well, since different domains have different prices.
4. Follow the prompts from there and if fully seen through, you'll have a new domain for your Shopify shop!

### Add Existing Domain

### Verify Shopify Connection

From the Shopify Admin page, click Verify connection to verify that your domain has been connected to your store.

## Managing a Domain

### Set your primary domain

The primary domain of your storefront is the domain name that customers see in the browser's address bar.

1. From the Shopify Admin page, go to the Online Store > Domains.
2. In Primary Domain, click Change primary domain.
3. Select the domain you would like set as the primary from the prompt.
4. Click Save.



## Remove a third-party domain

1. From the Shopify Admin page, go to Online Store > Domains.
2. In Third-party domains, locate the domain you want to remove and click Remove.
3. Click Remove again to confirm.

## Remove Shopify Domain

# Chapter 5. Selling Products

Selling in Person

Selling Online

# Chapter 6. Customers

## Managing Customers

### Managing Customers

New customers will have their names and information added to customer lists when they place an order in your store, allowing you to email them using their profile information. You are also able to add, edit, or delete customer profiles manually in certain circumstances. Using this information, you can create a customer group for sending emails or discounts to customers.

### Adding Customers

1. Go to the **Customers** page from the Shopify Admin, and click the **Add customer** button.
2. Input the information on the form, updating the checkboxes as necessary
  - a. Customer accepts marketing means that the customer has agreed to receive newsletters or marketing emails.
  - b. Collect tax details if you are charging a sales tax for the customer. Depending on the customer's, or your own location, there will be additional options or information, such as tax exemption options with Browse or search exemptions.
3. After filling out all the appropriate information, click Save customer to create or update the customer profile.

### Emailing Customers

1. On the Shopify Admin, click the Customers button, and select the profiles of the customers you want to email.
2. Click the customer's email address in the Customer overview, and then edit the subject as necessary ( `{{ shop.name }}` can be used to automatically generate your store's name in an email).
3. Type your message in the message field, and if you want to keep a copy for records, enter the email you want the copies sent to in the Send bcc to field.
4. Click the Review email when you are done, and then click Send notification if you are satisfied with the message, or Back if you want to revise the message.

# Editing Customer Information

## Edit Customers

Go to the **Customers** page from the Shopify Admin, and click the **Edit customer** button.

## Edit Customers Address

1. From your Shopify admin, go to Customers.
2. Click the name of the customer profile that you want to edit.
3. In the Default Address section, click Manage to view or edit existing addresses.
4. In the Manage Addresses dialog, click Edit address under the address that you want to edit.
5. Change the customer's address details and click Save.

## Edit Customer's Tag

Using tags can help you organize your customer profile list. You can use tags to label your customers with categories or descriptive terms. For example, if you have wholesale customers, then you can tag those customers as wholesale.

1. From your Shopify admin, go to **Customers**
2. Click the name of the customer profile you want to edit.
3. In the Tags section, add or edit your customer profile tags in the text box.
4. Click Save to confirm your changes.

## Edit a Customer's Name or Email

1. From your Shopify admin, go to the Customers sections.
2. Click the name of the customer profile you want to edit.
3. In the Customer overview section, click Edit.  
In the Edit customer dialog, you can change the customers:
  - First name.

- Last name.
- Email address.
- Phone Number
- Acklodgement to receive marketing

4. Click **Save** to confirm your changes to the customer profile's Information.

## Chapter 7. Orders

## Chapter 8. Transactions

## Chapter 9. Analytics



## Chapter 10. Troubleshooting

# Chapter 11. Glossary

## Glossary

### Glossary

#### **Website Domain**

The name of the website or URL, sometimes called the host name. A web domain is an actual presence on the Internet, such as a web page. A web domain name is a substitute that replaces the Internet Protocol (IP) address. For example, we can replace the IP address 207.97.195.109 with a domain name such as [www.shopify.com](http://www.shopify.com).

#### **Traffic Sources**

A report that provides an overview of the different kinds of sources that send people to your website.

- Direct Traffic: People who show up to the site by directly using the URL associated with it or from using a bookmark.
- Social: Other websites that send traffic over to you. These are commonly through social media sites such as Twitter and Facebook where the URL for the storefront is shared.
- Email: Traffic from emails that included links to the URL.
- Unknown: Traffic from places that cannot be determined. This is a common category.