

# **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

How to get started with Shopify

To get started using Shopify you have to settle on what it is you are going to sell and how you would like your store to look. You will be able to follow this guide to begin the process of selling your product to the public.

## **Making an Account**

Follow this video for a simple and quick explanation on how to create your account:

# Chapter 3. Setting Up

## 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

Your new storefront must start somewhere, so here's how you can get started.

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.

## Add a menu and links to your store

With how prevalent social media and the use of other sites are in today's day and age, you'll likely want to link external sites and accounts to your shopify storefront.

1. From the Shopify Admin page, go to Online Store > Navigation.
2. On the Navigation page, click the name of the menu you want to edit.
3. Click Add menu item.
4. Two input fields will appear. In the Name field, enter the name of the link you want to add. This is what will be displayed.
5. From the drop-down menu beside the link name, select the link type that best describes the link you're inputting.
6. Click Save menu.

## 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 a Theme

After you choose a theme that defines the basic look and feel of your online store, you can customize the theme to suit your unique brand. You can customize your theme settings from your Shopify admin by using the theme editor. The theme editor includes a theme preview and a toolbar that you can use to add and remove content, and to make changes to your settings. To learn about which settings are available for your theme, see your themes documentation.

If your theme doesn't include settings for the changes that you want to make and you are comfortable with HTML, CSS, and Liquid, then you can edit your theme code.



# Chapter 4. Domains

## Adding a Domain

### What is a Domain

Now that you have your store setup, you will need a way to show this store to your customers. This is where having a domain comes in.

A domain is the website address that customers can visit to browse and purchase from your store online. With Shopify you have a few options for domains depending on your preferences and starting point.

You can have a domain through Shopify. An example of the URL for this is `examplestore.myshopify.com`.

Alternatively, you can have a custom domain which you can either purchase a new URL or have one transferred to Shopify. An example of a URL for this is `examplestore.com`.

### 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

Shopify also allows you to add existing domains from third party providers. If you'd rather do that than purchasing one of Shopify's, here are the steps in doing so.

### Adding an Existing Third-Party Domain

1. From the Shopify Admin page, go to Online Store > Domains
2. Click Connect Existing Domain
3. Enter the third party domain you own, then click **Next**.

## Setting up your existing domain to connect to Shopify

Shopify gives you the option to add in your own domain, if it already exists.

1. Navigate to your domain provider and log into your account on that site.
2. Find your DNS Settings. These are generally located in the domain management area on the site, but this varies from provider to provider.
3. Once you find the DNS Settings, edit your A record to point to Shopify's IP address 23.227.38.65 (Copy and paste this into the field).

4. Save the A record.
5. In the DNS settings, find the CNAME record
6. Change your www CNAME record to point to shops.myshopify.com (copy this as well).
7. Save the CNAME record.

## 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 a Shopify managed domain

To remove a shopify domain, you must [contact support](#) to do so.


# Chapter 5. Selling Products

## Selling in Person

Shopify offers you the ability to sell both online and in person, expanding the possibilities for your business to grow.

Despite the fact that Shopify focuses on e-commerce, it also offers business owners a full retail store experience with Shopify POS app. This app allows you to create carts for customers, accept a range of payments and methods, track orders and inventory across retail locations, online stores and whatever other active sales channels you're running.

## Setting up the Shopify POS app

 **Note:** Before you start adding products and setting up your payments, there are a few administrative tasks that you should do:

- If you want to sell in person, then check with your local laws to see if the Shopify POS system is compliant in your country.
- Complete the initial setup so that your store address, email address, and other store settings are up to date.
- Know where to manage your account and access your billing information.
- Add staff accounts so that each of your staff members has a personal login account and all sensitive account information remains secure.

1. Configure your basic administrative settings
2. Download the Shopify App

## Selling Online

### Adding an online sales channel

1. Click the + button next to the Sales Channels heading in your Shopify admin.
2. Click the name of the sales channel you want to add in the Add sales channel dialog.

3. Click Add channel.

## Remove an online sales channel

1. Click Settings on the Shopify admin, and then click Sales channels.
2. Find the name of the sales channel you want to remove.
3. Click remove channel

# Chapter 6. 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

The screenshot shows the 'Add customer' form in the Shopify Admin. At the top left, there is a back arrow and the text 'Customers'. Below this is the title 'Add customer'. The form is divided into two main sections: 'Customer overview' and 'Address'. The 'Customer overview' section contains fields for 'First name', 'Last name', 'Email', 'Phone number', and a checkbox for 'Customer accepts marketing'. The 'Address' section contains fields for 'First name', 'Last name', 'Company', 'Address', and 'Apartment, suite, etc.'. A dropdown menu with the US flag is visible next to the phone number field.

< Customers


### Add customer

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**Customer overview**

First name Last name

Email

Phone number 

☐ Customer accepts marketing

---

**Address**

The primary address of this customer

First name Last name

Company

Address

Apartment, suite, etc.

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.

## Edit Customers

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

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### 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
  - Acknowledgement to receive marketing
4. Click **Save** to confirm your changes to the customer profile's Information.

## 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.
4. In the Edit customer dialog, you can change:
  - a. the customer's first name
  - b. the customer's last name
  - c. the customer's email address and phone number
  - d. the customer's phone number
  - e. if the customer accepts marketing (agrees to receive marketing emails)



# Chapter 7. Orders

## Orders Process

New orders will appear in the orders page when a customer makes a purchase from one of your online stores or sales channels. Orders are categorized into 3 different states in the processing flow:

- Order has been placed (Capturing payments): This occurs when customers use a credit/debit card to purchase and order. During this time, the bank is processing the purchase and determining whether the funds can be spent or not.
- Order has been paid (Fulfilling order): At this point, it's up to you to ship their order, hence why this process is referred to as order fulfillment.
- Order has been fulfilled and paid (Archive the order): The order has been both paid for and shipped. The customer has received their order, so there's no need to process the order further.

8:29 AM Fri Mar 1

Orders


#1024

Today	Today at 8:28 AM	
Elizabeth Gonzalez #1024	8:28 AM \$347.31	<b>\$347.31</b> Receipt #3-1003 Sold by Maddy Wahl Retail location 1 ● Paid ● Fulfilled
Yesterday		
Elizabeth Gonzalez #1023 ● Refunded	1:01 PM \$347.31	
Thursday, December 13, 2018		
#1022 ● Partially paid	12:44 PM \$42.46 Due \$38.26	
#1021	12:36 PM \$42.46	
#1020	12:32 PM \$42.46	
#1019	12:31 PM \$42.46	


Customer

Elizabeth Gonzalez

Items

Red Rain Coat  
Green / Small / Cotton Duck

\$129.00

Madison Bag

\$190.00

Return or exchange

Checkout

Orders

Customers

Store

## Status Page Overview

The overview shows you the overall status of all the orders placed by customers. Customers are given the option to receive links to their order status page by email. The email sent to them is a template that includes the page URL the order status page that tells them:

- Order confirmation
- Shipping confirmation
- Shipping update

## Customizing your Email Templates

The email templates control the Order confirmation and Shipping emails that customers are sent when their orders are fulfilled or updated. These emails are automatically sent to customers, but can be customized to fit what you would like the customers to see.

Customization is formatted using HTML, so if you need help understanding how it works, check out this simple guide.

1. From the Shopify Admin Page, go to Settings > Notifications.
2. Locate the Email Templates section, then find the Order confirmation and Shipping confirmation email templates.

# Chapter 8. Transactions

## Transactions

### Payment Methods

Shopify allows several different types of payment methods through storefronts. Payment methods are further customizable by storefront owners, as they can choose which type of payments to accept and decline, as well as methods based on if transactions take place in real life, or over the online storefront. These options include:

- Credit/Debit cards
- Cash (For in-person transactions)
- Manual card payments (customer enters in card details manually)
- Gift Cards

### Searching for an Order

1. On the **Orders** screen, tap the search icon.
2. In the search field, enter in either the **order ID**, **receipt number**, or **customer name**. Results will appear beneath the search bar.

Choose an order to open it up, or tap **Cancel** to return to the previous screen.

### Refund an Order

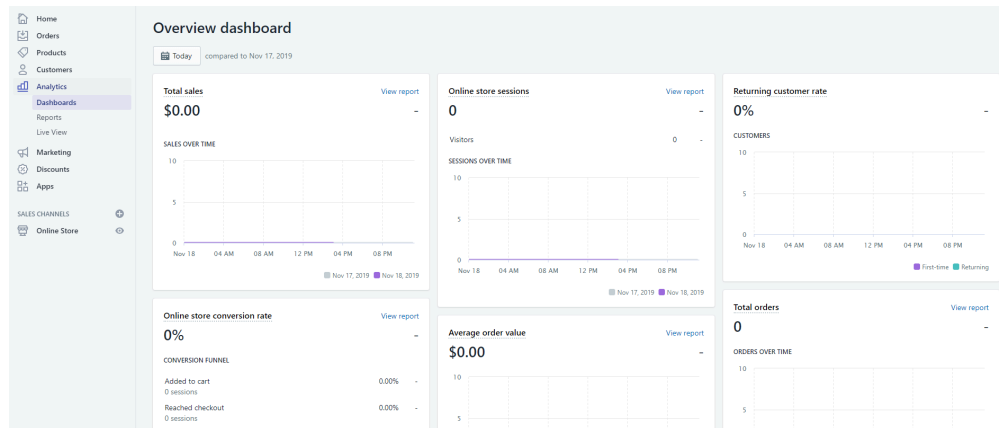
1. From the Shopify POS, tap **Orders**.
2. Choose the order of the item that needs to be refunded.

3. Tap **Refund or Exchange** and then tap which item(s) which will be refunded, then use the + or - buttons to enter the quantity of the item that will be refunded.
4. There are several optional choices that can be added based on the nature of the refund and the seller.

Once all constraints are satisfied, tap **Refund** then **Done**.

# Chapter 9. Analytics

## Analytics



In the Overview dashboard you can do the following activities:

- check the value of your recent sales and compare them to a previous time period
- compare how well your sales channels are performing
- track your average order value
- see where your visitors are coming from—by region or by social media source
- monitor the trends over time

The dashboard shows the most valuable metrics that give you insight into the performance of your store and the behavior of your customers. The metrics are shown in numeric format and also as graphs where appropriate. For all the metrics, the percentage change from the previous date range can also be shown.

## Analytics - View your Data

- 1.) From your Shopify admin, go to **Analytics > Dashboards**. By default, the dashboard shows data for today compared to yesterday.

- 2.) If you want to see data for another date range, then click the date menu and select a different date range. You can select a preset range, such as **Last 30 days**, or you can set any custom range by clicking dates on the calendar.
  - 3.) If you want to show comparisons with the previous period or to the same date range from the previous year, then check **Compare to previous dates** and select a comparison value.
  - 4.) Click **Apply**.
- 5.) Optional: If the **View report** link is shown, then click it to see more details about the metric. Not all metrics have a report, and you need to be on a plan that provides the detailed Shopify

# Chapter 10. Troubleshooting

## Troubleshooting

### **What is Shopify's IP address?**

When using a third-party or external domain for your shop, usually you must state shopify's IP address for the third-party provider. If so, it is 23.227.38.65. This IP will need to be set as your A record on the other site.

### **How do I change my myshopify.com domain?**

You cannot because your myshopify.com domain is a URL that is a unique identifier for your store, therefore it can't be changed or removed. However, it can be replaced with a custom domain name.

### **Why isn't my Shopify POS synced with my Shopify Admin?**

The Shopify POS app usually updates automatically with any changes made on the admin page, but if you find the desktop and mobile apps aren't synced with the same information, you can force the app to resync with the Shopify admin.

From the Shopify POS app, press your Ipad's home button to send the app into the background.

From the Ipad's home screen, find and tap the Shopify POS app.

Check to see if the app has been updated with the new changes.

If the app still hasn't updated, force close the app, then reopen it.

Double tap the home button to bring up all of the running apps on the Ipad.

Located the shopify app and swipe the window up until the window has left the screen.

Tap the home button again, then located the Shopify POS app and tap it open.

# 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.