

Shopify

- Product Management
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Product Management

Steps:

1. Access Products:

- Log in to Shopify.
- Click *Products* from the left-hand menu.

2. Add a New Product:

- Click *Add product*.
- Enter:
 - **Title** (product name)
 - **Description** (detailed, customer-friendly)
 - **Media** (images/videos)
- Set:
 - **Price**
 - **SKU** (if used)
 - **Inventory levels**
 - **Shipping details** (tick *This is a physical product* if applicable)

3. Add Variants (if applicable):

- Scroll to *Variants*.
- Click *Add variants*.
- Enter options (e.g., size, colour) and individual details for each variant (price, stock).

4. Organise Products:

- **Collections:** Assign the product to relevant collections (e.g., Men's, Sale).
- **Tags:** Add internal tags for better organisation (e.g., Summer, New Arrival).

5. **Edit Existing Products:**

- Click on any product from the product list.
- Update details as needed (price, inventory, images, description).
- Use the *bulk editor* for batch updates:
 - Select multiple products.
 - Click *Bulk edit*.
 - Modify fields like price, stock, or tags in one go.

6. **Archive or Delete Products:**

- **Archive:** Removes product from the storefront but keeps it in your records.
 - **Delete:** Permanently removes the product.
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Best Practices:

- Use **high-quality images** and detailed descriptions to improve conversions.
- Regularly review **inventory levels** to avoid stock issues.
- Keep product titles **clear and descriptive** for SEO.
- Use **collections** to improve website navigation for customers.

Collections Management

Steps:

1. Access Collections:

- Log in to Shopify.
- Click *Products > Collections*.

2. Create a New Collection:

- Click *Create collection*.
- Enter:
 - **Title** (e.g., Sale, New Arrivals)
 - **Description** (optional - may display on your store)

3. Choose Collection Type:

- **Automated Collection:**
 - Set conditions (e.g., *Product tag = Sale*).
 - Products matching these conditions are automatically added.
- **Manual Collection:**
 - Click *Add products* to select items individually.

4. Set Product Display Order:

- Options include:
 - Alphabetically
 - By best-selling
 - By newest
 - Manual sort (drag and drop)

5. **Edit SEO Settings:**

- Scroll to *Search engine listing preview*.
- Edit **Page title** and **Meta description** for SEO.

6. **Save Collection:**

- Click *Save* in the top right.
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Best Practices:

- Use **automated collections** for dynamic categories (e.g., Sale, New Arrivals).
- Use **manual collections** for curated selections (e.g., Staff Picks).
- Keep collection **titles descriptive and clear** for both customers and SEO.
- Review collections regularly to ensure they stay relevant.

Order Management

Steps:

1. Access Orders:

- Log in to Shopify.
- Click *Orders* on the left-hand menu.

2. Review an Order:

- Click on the order you want to manage.
- Review customer details, items, shipping, and payment status.
- Add internal notes or tags if needed.

3. Fulfil an Order:

- Click *Fulfil Items*.
- Enter the tracking number (if applicable) and select the carrier.
- Click *Fulfil Items* to complete and notify the customer.

4. Partially Fulfil an Order:

- Select only the items you wish to fulfil.
- Leave the remaining items unfulfilled for later shipment.

5. Issue a Refund:

- Click *Refund* at the top of the order page.
- Select items and/or shipping to refund.
- Choose whether to restock returned items.
- Click *Refund* to process.

6. Create a Draft Order:

- Click *Drafts* in the Orders section.
 - Click *Create Order*.
 - Add products, apply discounts (if applicable).
 - Send an invoice to the customer or mark as paid.
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Best Practices:

- Always add tracking information to keep customers informed.
- Use order tags to segment or prioritise orders (e.g., VIP, wholesale).
- Review the *Abandoned Checkouts* section periodically to follow up on lost sales.

Customer Management

Steps:

1. Access Customers:

- Log in to Shopify.
- Click *Customers* from the left-hand menu.

2. View Customer Profiles:

- Click on any customer to see:
 - **Contact details**
 - **Order history**
 - **Total spent**
 - **Tags**

3. Edit Customer Details:

- Inside the customer profile, click *Edit* to update:
 - Email
 - Phone number
 - Address
- Add or remove **tags** (e.g., VIP, Wholesale).

4. Create Customer Segments:

- On the main *Customers* page, click *Create segment*.
- Use filters to define criteria (e.g., customers who spent over £100).
- Save and name your segment for future use.

5. Export Customers:

- Click *Export* (top right of the Customers page).

- Choose:
 - **All customers**
 - **Current page**
 - **Selected customers**
 - **A segment**
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Best Practices:

- Use **tags and segments** to personalise marketing (e.g., special offers for VIPs).
- Regularly update customer information for accurate records.
- Export customer segments for targeted email campaigns.
- Review **new vs returning customers** in analytics to monitor retention.

Shipping Methods

Steps:

1. Access Shipping Settings:

- Log in to Shopify.
- Click *Settings* (bottom left).
- Select *Shipping and delivery*.

2. Manage Shipping Profiles:

- Click on the *General shipping profile* (or create a new profile if needed for specific products).

3. Edit Shipping Zones:

- Inside the profile, review the *Shipping from* location.
- Under *Shipping to*, click *Manage rates* for existing zones or *Create shipping zone* to add a new region (e.g., Europe).

4. Add or Edit Shipping Rates:

- Inside a zone:
 - Click *Add rate*.
 - Enter:
 - **Rate name** (e.g., Standard Delivery)
 - **Price** (e.g., £4.99)
 - Optional: Add conditions (e.g., free shipping for orders over £50).
- Options include:
 - **Flat rates**
 - **Free shipping**
 - **Carrier-calculated rates** (requires integration with courier services).

5. **Set Up Local Delivery or Pickup (Optional):**

- Scroll to *Local delivery* or *Local pickup*.
- Click *Add delivery method* and set conditions (e.g., postal codes for delivery).

6. **Save Changes:**

- Click *Save* after making updates.
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Best Practices:

- Offer **free shipping thresholds** (e.g., free shipping over £50) to boost average order value.
- Use **clear rate names** (e.g., Standard Delivery 2-3 Days) to set expectations.
- Regularly review rates to ensure they reflect current courier costs.
- Test checkout with different locations to confirm shipping rates are applied correctly.

Discount Codes

Steps:

1. Access Discounts:

- Log in to Shopify.
- Click *Discounts* from the left-hand menu.

2. Create a Discount:

- Click *Create discount > Discount code*.
- Enter a custom code (e.g., SUMMER20) or click *Generate code*.

3. Select Discount Type:

- **Percentage** (e.g., 10% off)
- **Fixed amount** (e.g., £5 off)
- **Free shipping**
- **Buy X get Y** (e.g., buy 2 get 1 free)

4. Apply Conditions:

- **Applies to:** All products, specific collections, or products.
- **Minimum requirements:** None, minimum spend, or quantity.
- **Customer eligibility:** Everyone, specific groups, or customers.

5. Set Usage Limits (Optional):

- Limit total uses across all customers.
- Limit to one use per customer.

6. Set Active Dates:

- Choose start date/time.

- (Optional) Set an end date/time.

7. **Save Discount:**

- Click *Save discount* in the top right.
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Best Practices:

- Use **clear, easy-to-remember codes** for manual entry (e.g., WELCOME10).
- Set **expiry dates** for urgency on limited-time promotions.
- Combine **minimum spend** with free shipping to increase average order value.
- Review **discount usage reports** to track performance.

Analytics

Steps:

1. Access Analytics:

- Log in to Shopify.
- Click *Analytics* from the left-hand menu.

2. Use the Overview Dashboard:

- Review key metrics:
 - **Total sales**
 - **Online store sessions**
 - **Conversion rate**
 - **Average order value**
 - **Top products** and **traffic sources**
- Adjust the date range (top right) for specific periods.

3. Access Detailed Reports:

- Click *View reports* under the overview section.
- Key reports:
 - **Sales by product**
 - **Sales by channel**
 - **Sessions over time**
 - **Customer behaviour** (new vs returning)

4. Use Live View (Optional):

- Click *Live View* (top right under Analytics).
- Monitor real-time visitors, sessions, and orders.

5. **Export Reports:**

- Open any report.
 - Click *Export* (top right) to download as a CSV.
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Best Practices:

- Review analytics **weekly or monthly** to spot trends.
- Focus on:
 - **Conversion rate** (how well traffic turns into sales).
 - **Average order value** (look for ways to increase this).
 - **Traffic sources** (identify top-performing channels).
- Use **customer reports** to understand retention and repeat purchase behaviour.
- Integrate **Google Analytics** for deeper insights on traffic and user behaviour.