

TAKO AGENCY PRESENTS

DIY Shopify Admin Store Guide



**New to Shopify?, or just a little rusty?
We've got you covered.**

Here's a step-by-step guide for each section within the
Shopify Admin.

Hi there!

Z and Grace here, founder and CEO (respectively) of Tako Agency. Thanks for downloading our Shopify Admin Guide!

We wrote this guide to help merchants new to Shopify learn their way around, AND give existing merchants a deeper understanding of the dashboard that is The Center of Everything™.

The guide will walk you through each area of your Shopify Admin, from adding and organizing products to setting up custom email templates and more. Everything happens in the Admin, so it's worthwhile to spend some time to learn how it all works.

And just who the heck are we, to be writing such a guide? Tako is a full-service Shopify-focused agency made up of of nearly 30 design, development, and marketing experts. We have decades of experience building and scaling businesses, and can help with everything from killer site design and UX to custom app builds and subscription/membership builds.

Got a question? Tweet us @takoagency or drop us an email at help@takoagency.com. We're happy to help.

Happy building,

Z (Founder) + Grace (CEO)
www.takoagency.com.





Why did we create this guide?

It's pretty simple. We love Shopify and work with Shopify merchants around the world. Over the years, we noticed many of the same questions coming up over and over again — so we decided to do something about it! The guide that we've created here covers the basics you need to know to get started with your Shopify site.

Tako Agency is a Shopify partner, and we're proud to be partnered with a great company that empowers entrepreneurs across the globe. However, we want to be clear that we don't work for Shopify, and have no intention to misrepresent ourselves as being part of their brand. This is not an "official" Shopify guide. Instead, we put this document together based on our experience and expertise to serve as a stepping stone to get your business off the ground. If you have any questions, please email us at help@takoagency.com.



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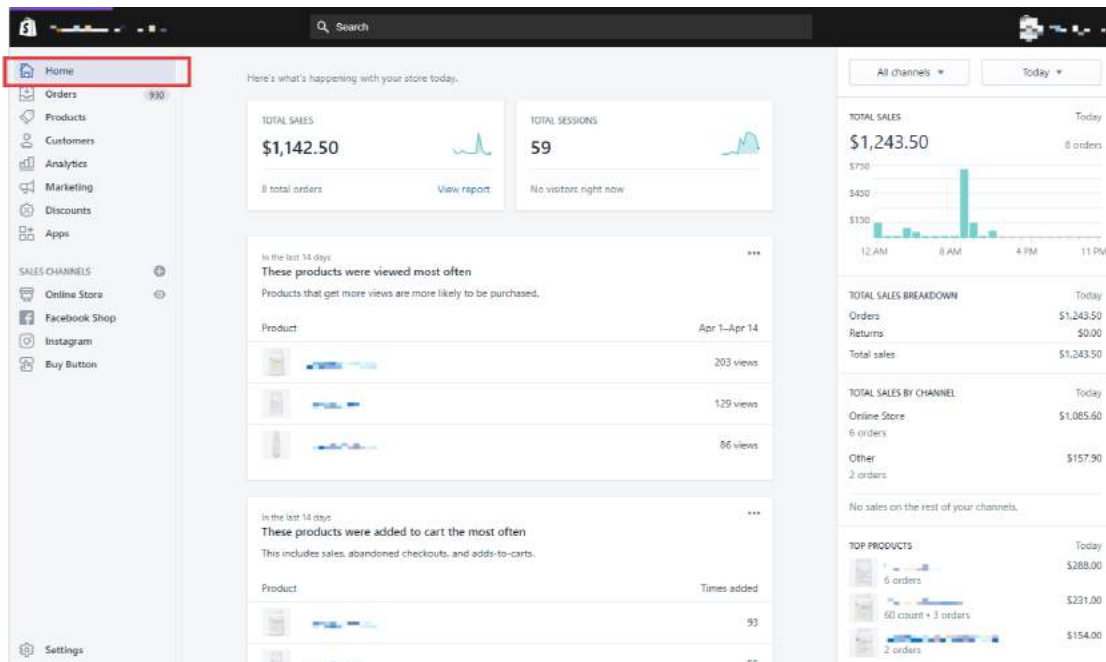
Settings

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Home

URL </admin> 

Shopify Home shows information about daily tasks, your store's recent activity, and the next steps you can take to build your business.



The four squares right in the middle at the top give you a quick summary of your store's activity today. They are, left to right:

Today's sales shows the total sales made on your Shopify store on any given day. If you haven't made a sale yet that day, you'll see "No sales yet."

Today's orders shows the total number of orders made on your Shopify store on any given day. If you haven't had an order yet that day, you'll see "No orders yet."

Today's sessions shows the total number of visits to your Shopify store on any given day. You will only see this card if you have an online store.

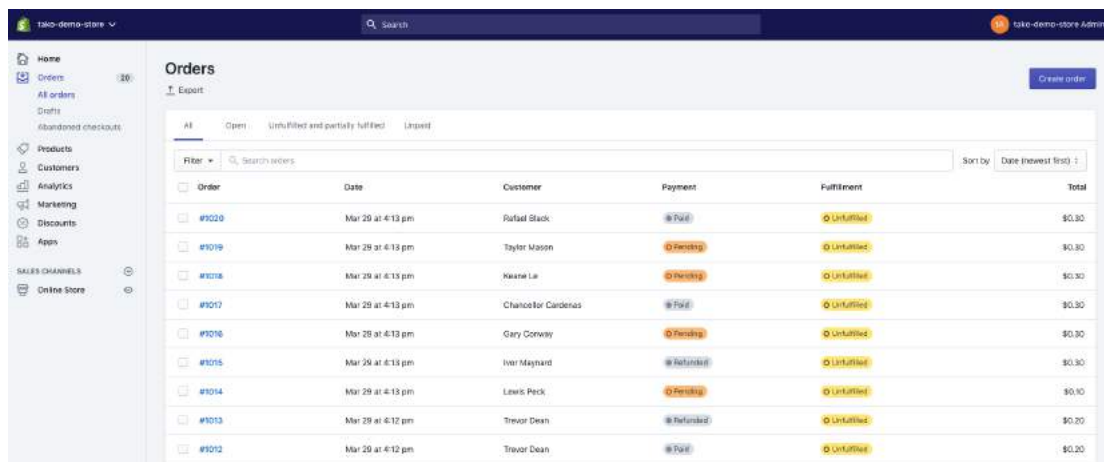
Visitors live right now shows the number of visitors who have been active on your online store in the past 5 minutes. You will only see this card if you have an online store.

Orders

All Orders

URL </admin/orders> 

After a customer places an order through your store, it appears in the Orders area of your Shopify Admin menu. You can also manually create orders for a specific customer to record orders you've taken outside of Shopify, or to send an email invoice to a customer.

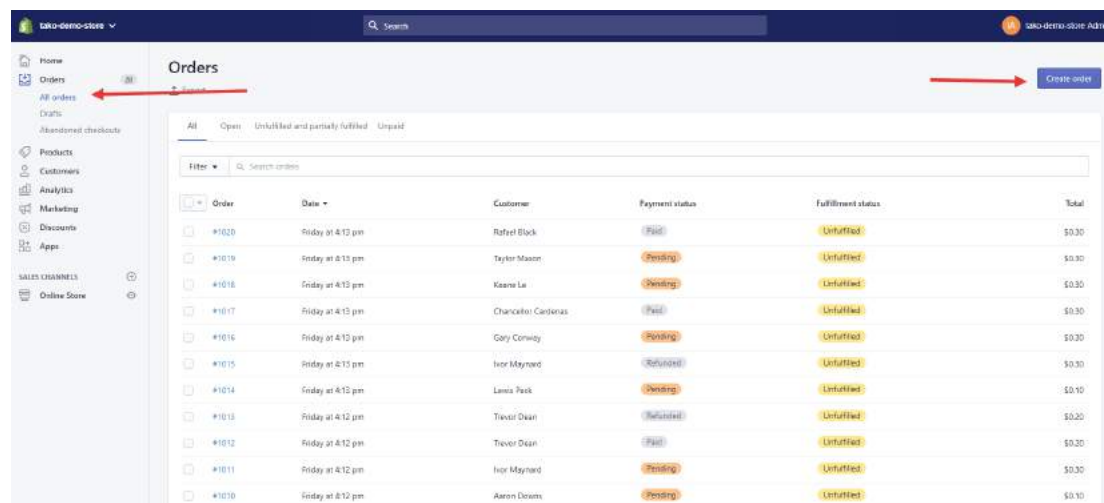


The screenshot shows the Shopify Admin interface for the 'tako-demo-store'. The left sidebar contains navigation links for Home, Orders, Drafts, Abandoned checkouts, Products, Customers, Analytics, Marketing, Discounts, Apps, and Sales Channels. The main content area is titled 'Orders' and includes a search bar, a filter dropdown, and a table of orders. The table has columns for Order, Date, Customer, Payment, Fulfillment, and Total. The orders listed are #1020 through #1012, with various payment and fulfillment statuses.

Order	Date	Customer	Payment	Fulfillment	Total
#1020	Mar 29 at 4:13 pm	Rafael Black	Paid	Unfulfilled	\$0.30
#1019	Mar 29 at 4:13 pm	Taylor Mason	Pending	Unfulfilled	\$0.30
#1018	Mar 29 at 4:13 pm	Kaane Le	Pending	Unfulfilled	\$0.30
#1017	Mar 29 at 4:13 pm	Chancefor Cardenas	Paid	Unfulfilled	\$0.30
#1016	Mar 29 at 4:13 pm	Gary Conway	Pending	Unfulfilled	\$0.30
#1015	Mar 29 at 4:13 pm	Ivor Maynard	Refunded	Unfulfilled	\$0.30
#1014	Mar 29 at 4:13 pm	Lewis Peck	Pending	Unfulfilled	\$0.10
#1013	Mar 29 at 4:12 pm	Trevor Dean	Refunded	Unfulfilled	\$0.20
#1012	Mar 29 at 4:12 pm	Trevor Dean	Paid	Unfulfilled	\$0.20

To manually create your own orders:

1. Click on the Orders page
2. Click “Create order” in the upper right



This screenshot is identical to the one above, but with red arrows highlighting the 'Orders' link in the left sidebar and the 'Create order' button in the top right corner of the main content area.

Order	Date	Customer	Payment status	Fulfillment status	Total
#1020	Friday at 4:13 pm	Rafael Black	Paid	Unfulfilled	\$0.30
#1019	Friday at 4:13 pm	Taylor Mason	Pending	Unfulfilled	\$0.30
#1018	Friday at 4:13 pm	Kaane Le	Pending	Unfulfilled	\$0.30
#1017	Friday at 4:13 pm	Chancefor Cardenas	Paid	Unfulfilled	\$0.30
#1016	Friday at 4:13 pm	Gary Conway	Pending	Unfulfilled	\$0.30
#1015	Friday at 4:13 pm	Ivor Maynard	Refunded	Unfulfilled	\$0.30
#1014	Friday at 4:13 pm	Lewis Peck	Pending	Unfulfilled	\$0.10
#1013	Friday at 4:12 pm	Trevor Dean	Refunded	Unfulfilled	\$0.20
#1012	Friday at 4:12 pm	Trevor Dean	Paid	Unfulfilled	\$0.20
#1011	Friday at 4:12 pm	Ivor Maynard	Pending	Unfulfilled	\$0.30
#1010	Friday at 4:12 pm	Aaron Deans	Pending	Unfulfilled	\$0.10

3. The fields highlighted in red boxes here are the ones you need to complete.

shopify

Unsaved changes

Discard Save

< Orders

Create order

Some features unavailable

- To add a credit card payment, activate a direct credit card gateway on your store — Payment settings

Order details

Search products

Browse products

Notes

Add a note...

Add discount

Subtotal \$0.00

Add shipping

Taxes \$0.00

Total \$0.00

Find or create a customer

Search customers

Create a new customer

Zeph Foreman
example_jamale_330@e...

Isiah Murphy
example_jamale_392@e...

Chadwick Medina
example_jamale_393@e...

Nolan Collins
example_jamale_378@e...

Uric Baker
example_jamale_368@e...

Armando Poole
example_jamale_359@e...

EMAIL INVOICE

Email invoice

ACCEPT PAYMENT

Mark as paid

Mark as pending

Pay with credit card

Save draft order

Here you can select the appropriate customer and the products they ordered.



Tako Agency Pro Tip:

When you are creating an order directly from the Shopify Admin, you have the ability to add custom items that are not "products" or "services" in your store.

< Orders

Create order

Order details

Search products

Browse products

Notes

Add a note...

Add discount

Subtotal \$0.00

Add shipping

Taxes \$0.00

Total \$0.00

Find or create a customer

Search customers

Tags

View all tags

Urgent, reviewed, wholesale

EMAIL INVOICE

Email invoice

ACCEPT PAYMENT

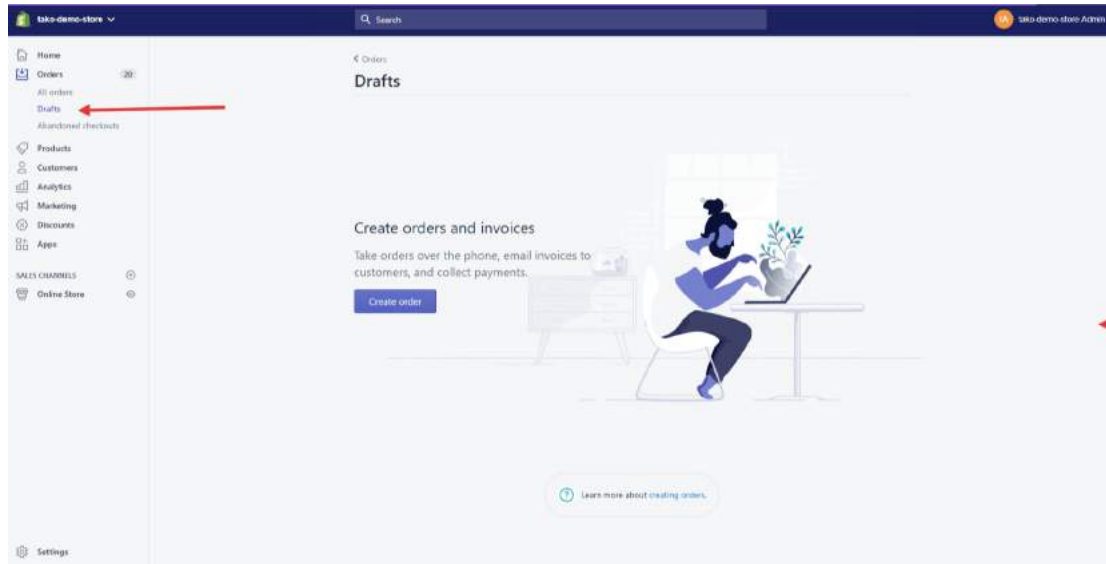
Mark as paid

Mark as pending

Pay with credit card

Drafts

URL /admin/draft_orders 



You can create orders for your customers and send them invoices from the Shopify admin or the Shopify app. The orders that you create on behalf of your customers are called draft orders. Draft orders are similar to the orders that your customers create for themselves. A draft order is converted to an order when you accept payment for it.

Draft orders can contain the following information:

- one or more products
- discounts on individual items or the entire order
- shipping rates
- applicable taxes
- customer information
- tags

Draft orders are useful when you need to:

- Accept payment for an order you take over the phone, in person, or elsewhere. When you accept payment for your draft order, an order is created for it on the Orders page.
- Send invoices to customers to pay with a secure checkout link.
- Use custom items to represent additional costs or products that aren't displayed in your inventory.

- Manually re-create mistaken orders from any of your active sales channels.
- Sell products at discount or wholesale rates.
- Take pre-orders.
- Save the orders as a draft and resume working on it later. If you save your order as a draft, then you can update it later from the Drafts page in your Shopify admin.



Abandoned Checkouts

URL </admin/checkouts> 

Abandoned Checkouts						Export
All						
<input type="text" value="Filter Items"/>						Status ▾ Recovery Status ▾ Email Status ▾ ★ Saved ↑↓ Sort
<input type="checkbox"/>	Checkout	Date	Placed By	Email Status	Recovery Status	Total
<input type="checkbox"/>	#21518732656824	Jun 29 at 2:48 pm	██████████	Sent	Not Recovered	\$30.50
<input type="checkbox"/>	#14398622498967	Jul 13, 2020	██████████	Sent	Recovered	\$70.90

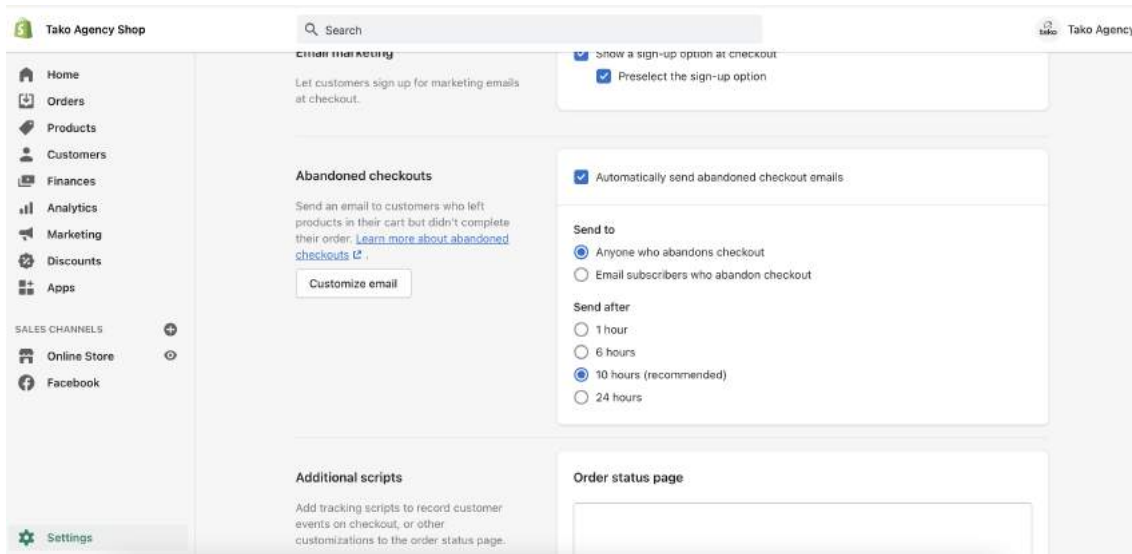
Not everyone who adds a product to their cart completes the checkout. When a potential customer provides their contact information and continues to the next page of the checkout--but doesn't complete the order--their cart is stored as an “abandoned checkout.”

Typically, the customer will be prompted to input their email address at the beginning of the checkout process. If they don't enter their email before they abandon the checkout, then you can't send them an abandoned checkout notification. A customer account will not be created either, and items in their abandoned cart will not be saved.

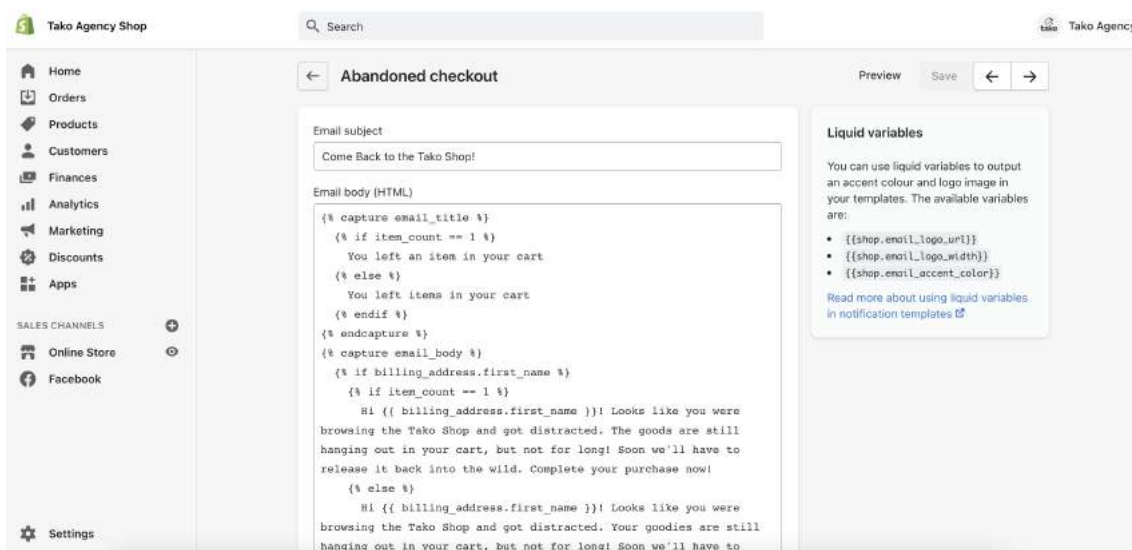
As a store owner, it's important not to miss the opportunity provided by an abandoned checkout! Use email marketing to encourage customers to follow through with their purchase. However, if you already have an abandoned cart flow set up through an email marketing software like Klaviyo, make sure it's turned *off* here in Shopify -- otherwise customers will be getting hit with emails from both sources, and that's annoying.

To set up automatic abandoned checkout emails:

- From your Shopify admin, go to Orders > Abandoned checkouts.
- Select the settings for your emails



To edit the content of your abandoned checkout emails, click the “Customize email” button in the Abandoned checkout section shown above and edit away!



Tako Agency Pro Tip:

Make sure to pay attention to patterns you see with abandoned checkouts over time. For example, are you consistently seeing carts become abandoned as the total approaches \$150? If so, consider offering some sort of promo, giveaway, bonus item, or other benefit to incentivize customers to hit that mark.

Products

All Products

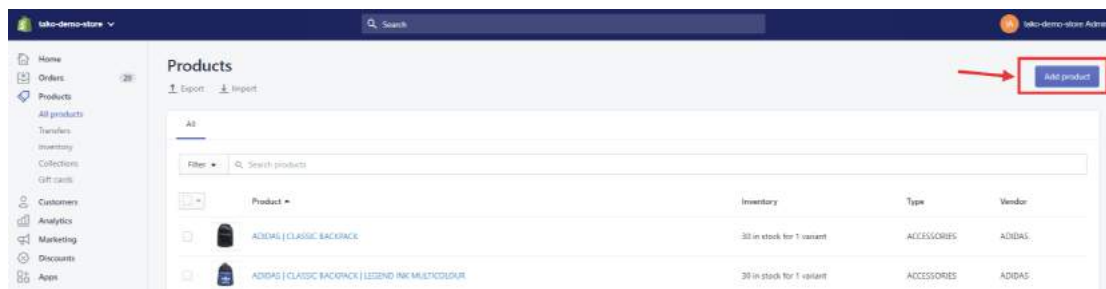
URL </admin/products> 

Now it's time to add some goodies to your store so you can get selling!

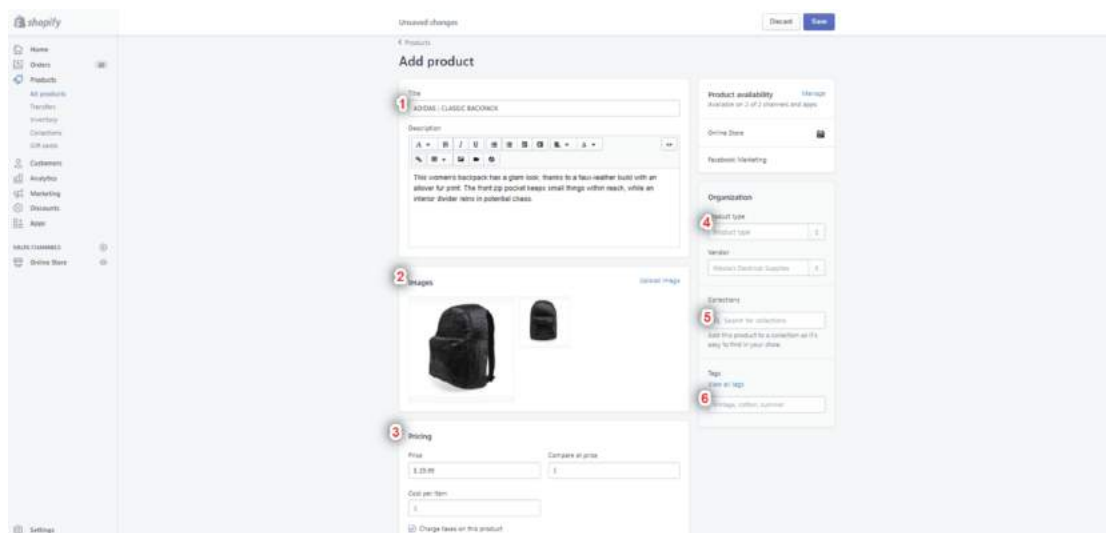
To add a new product to your store:

Step 1. Click on the “Products” header in the Shopify Admin menu.

Step 2. Click on the Add Product button



There are 11 fields to review for each product. We've numbered them here in the screenshots to help you.



7 Pricing

Price: \$ 25.00 Compare at price: \$ 40.00
 Cost per item: \$
☐ Charge taxes on this product

8 Inventory

SKU (stock keeping unit):
 Inventory policy: shopify_inventory_policy_default
☐ Allow customers to purchase this product when it's out of stock

9 Shipping

☒ This is a physical product

Weight
 Used to calculate shipping rates at checkout and during shipping fulfillment.
 Weight: 0.5 kg
 Unit: kg

Customs information
 Used by border officers to calculate duties when shipping internationally. Shown on customs forms and shipping labels.
 Country/region of origin: Select country/region
 In most cases, where the product is manufactured.
 HS (HARMONIZED SYSTEM) CODE: 6107110000
 (A. Select by product type based on HS code)

10 Variants

Add variants if this product comes in multiple versions, like different sizes or colors.

Option name	Option value
Size	US 6, US 7, US 8
Color	BURG, RED, WHITE

View the variants to be created

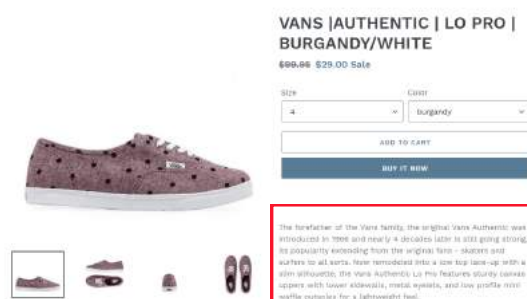
Variant	Price	SKU	Barcode	Inventory
US 6 BURG	\$5.00	burg-01		35
US 7 BURG	\$5.00	burg-02		123
US 8 BURG	\$5.00	burg-03		12
US 6 RED	\$5.00	red-01		5

11 Search engine listing preview

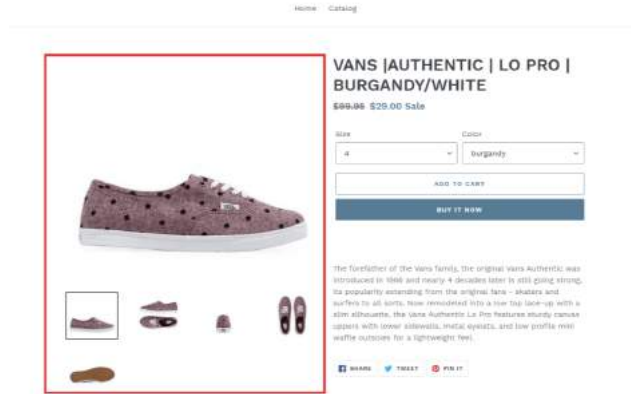
ADIDAS | CLASSIC BACKPACK
 High-quality, durable, and comfortable backpack. Perfect for school, work, or travel. The backpack features a large main compartment, a front pocket, and a top handle. The backpack is made of high-quality materials and is available in a variety of colors.

1. Product Title: (note that this title will also be used to construct the URL for the product, although you can change that later in section 11)

2. Description: Here's your chance to describe your product in detail. This is a rich text editor, so you can include lists, headings, special text formatting, etc. With most Shopify themes, the description will appear near the product images and "Buy" button on the product page, as seen here. High quality themes should let you choose in the theme editor whether you want it above or below the add to cart button(s)



3. Images: Now show potential customers what the product looks like! Add images by clicking “Upload Image” in the upper right corner or by dragging and dropping. In many themes, the images will be displayed as a slideshow with thumbnails



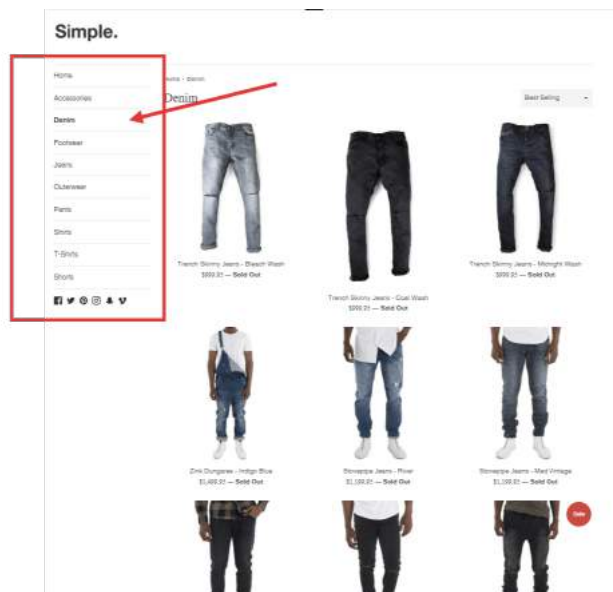
With others, images may be stacked or have features such as hover-to-zoom. TIP: Don't forget to add alt-text and make sure the file names for your images are relevant and informative. It's good for SEO!

4. Organization: You can choose to organize your products by Product Type or Vendor. This section isn't customer-facing; it's only for your administrative purposes. Organizing products for a customer view will be done in the next step, “Collections.”

a. Product Type: If you have multiple types of products such as boots, hats, bags, etc, you can use this field to simplify the management of them. For example, if products are properly organized you can search for them by type in your product admin area.

b. Vendor: There are a couple of ways to use this field. If you're a reseller, you can use it to notate your vendor. Otherwise, use it to notate brands. Similar to Product Type, this field can be used to organize products in the admin section, and in some themes, you can display the vendor on the product page.

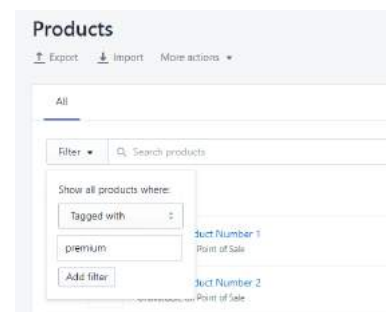
5. Collections: Most Shopify sites rely heavily on collections. Think of this like a product category. Products can belong to more than one collection; for example, if you're selling a pair of men's boots, they could be in the “Men's” collection AND in the “Featured” collection highlighted on the home page. All themes come with a Collection Template, where all products in a collection are displayed in a list or grid that is sortable and filterable. Products don't have to belong to a collection, but it's a recommended practice because it makes searching for products much more user-friendly.



As you can see here, collections are listed in the left side panel and if you click on one, like “Denim,” you’ll see all the products belonging to that collection.

NOTE: Before being able to add a product to a collection, you must first create the collection itself. We’ve included more in-depth information on that a little later on, in the “Collections” section on page 16.

6. Tags: Tags are just another way to display and organize your products for your customers, and to manage your inventory in the admin area. Your customers can use tags to filter products and zero in on those they are most interested in through searches, related products, and/or filters. Tags can also be used to organize subcollections within your main collections.



7. Pricing: There are 3 fields to complete here:

Price: Current price

Compare at price (optional): Original price before sale

Cost per item: This is an option that allows you to track the cost of the goods that you are selling. The customer will not see this information, but it’s very handy for your profitability analytics.

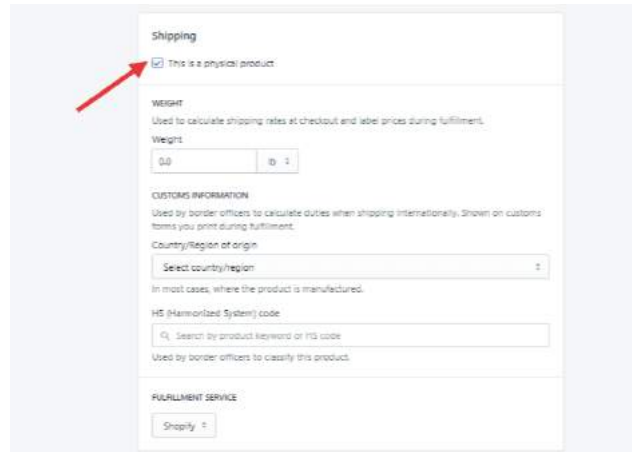
8. Inventory:

SKUS: Codes that you can use internally to track your inventory and report on your sales

Quantity: the amount of this particular product you have available

9. Shipping:

If you check the box “This is a physical product”, you must input the **Product weight, Country/Region of Origin, and HS code.**



Shipping

☒ This is a physical product

WEIGHT
Used to calculate shipping rates at checkout and label prices during fulfillment.

Weight
0.0 lb 1

CUSTOMS INFORMATION
Used by border officers to calculate duties when shipping internationally. Shown on customs forms you print during fulfillment.

Country/Region of origin
Select country/region

In most cases, where the product is manufactured.

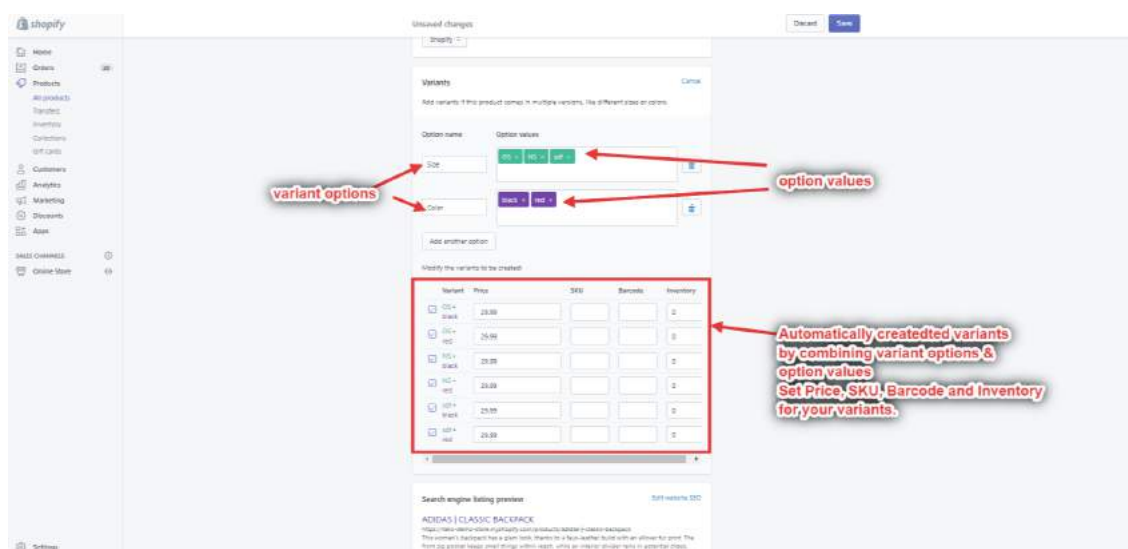
HS (Harmonized System) code
Search by product keyword or HS code
Used by border officers to classify this product.

FULFILLMENT SERVICE
Shipify

If the product is non-physical, just uncheck the box at the top and you're done!

10. Variants:

Here you can set up variants of your product, such as size, type, or color. You can set up to 3 different types of variants. After creating the variant options, just set the option values and Shopify will automatically create all possible variants in the grid below, where you'll have the option to assign variant-specific SKUs or charge different pricing for certain options.



Variant

Option name: Size, Color

Option values: S, M, L, XS, XXS, XXL, XXXL, XXXXXL

Automatically created variants by combining variant options & option values. Set Price, SKU, Barcode and Inventory for your variants.

Variant	Price	SKU	Barcode	Inventory
Size: S, Color: black	29.99			0
Size: S, Color: red	29.99			0
Size: S, Color: blue	29.99			0
Size: M, Color: black	29.99			0
Size: M, Color: red	29.99			0
Size: M, Color: blue	29.99			0
Size: L, Color: black	29.99			0
Size: L, Color: red	29.99			0
Size: L, Color: blue	29.99			0

Tako Agency Pro Tip:

If your product line requires a complex configuration due to the number of variants or options it requires, there are many ways to customize this section further.

We have the ability to really push the envelope on the product page and how it functions, so if you need something unique - don't hesitate to ping us.

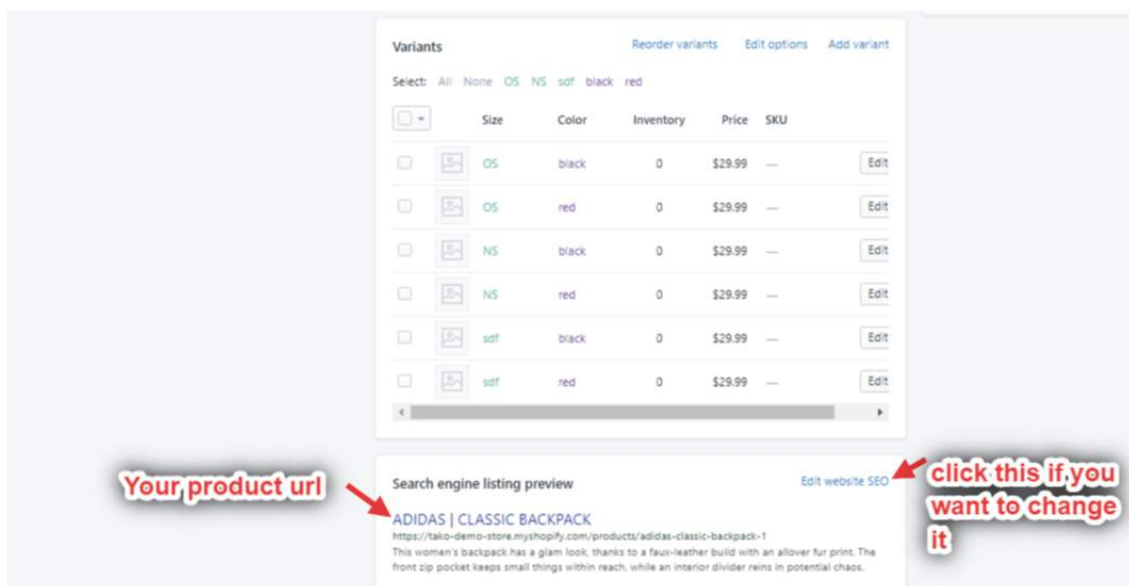
11. Search Engine Listing Preview:

Tako Agency Pro Tip:

We highly recommend focusing on this section and making sure that you have a clear URL for your product that Google can read.

This section gives you a sneak peek for how this product page will display in Google search listings. It also previews the URL to your product, which is automatically generated by Shopify according to your product name.

If you don't like the automatically generated one, you can just edit it by clicking the link in the upper right corner. You have the power to change both the URL and the description, if you wish.



Your product url

click this if you want to change it

Select	Size	Color	Inventory	Price	SKU	
<input type="checkbox"/>	OS	black	0	\$29.99	—	Edit
<input type="checkbox"/>	OS	red	0	\$29.99	—	Edit
<input type="checkbox"/>	NS	black	0	\$29.99	—	Edit
<input type="checkbox"/>	NS	red	0	\$29.99	—	Edit
<input type="checkbox"/>	sdf	black	0	\$29.99	—	Edit
<input type="checkbox"/>	sdf	red	0	\$29.99	—	Edit

Search engine listing preview

ADIDAS | CLASSIC BACKPACK

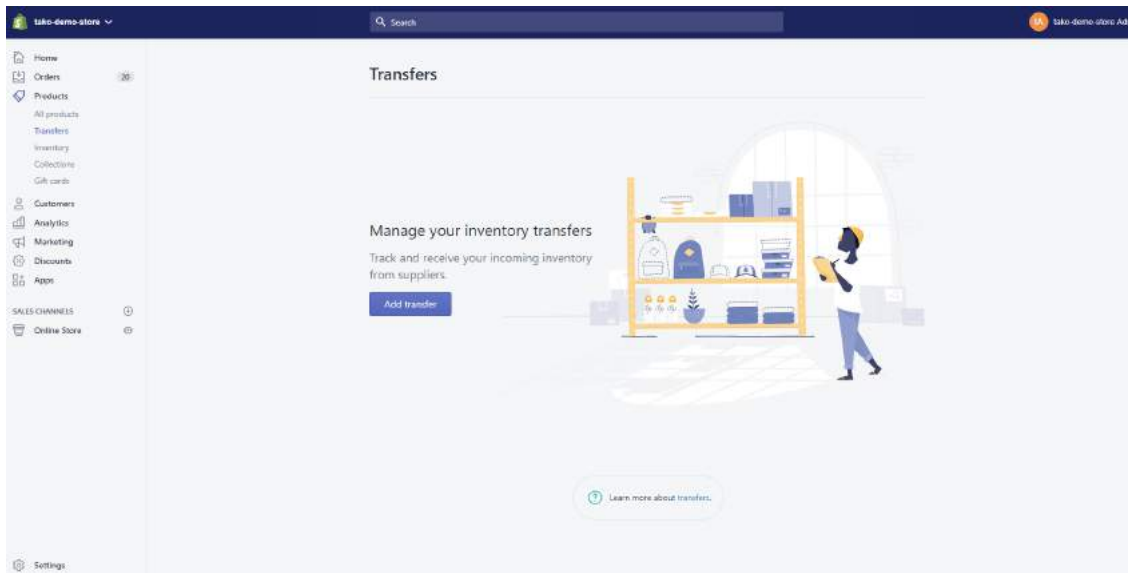
<https://tako-demo-store.myshopify.com/products/adidas-classic-backpack-1>

This women's backpack has a glam look, thanks to a faux-leather build with an all-over fur print. The front zip pocket keeps small things within reach, while an interior divider reins in potential chaos.

[Edit website SEO](#)

Transfers

URL </admin/transfers> 



You can use the **Transfers** section under the “Products” menu header to track, receive, and record incoming purchase orders and inventory from suppliers.

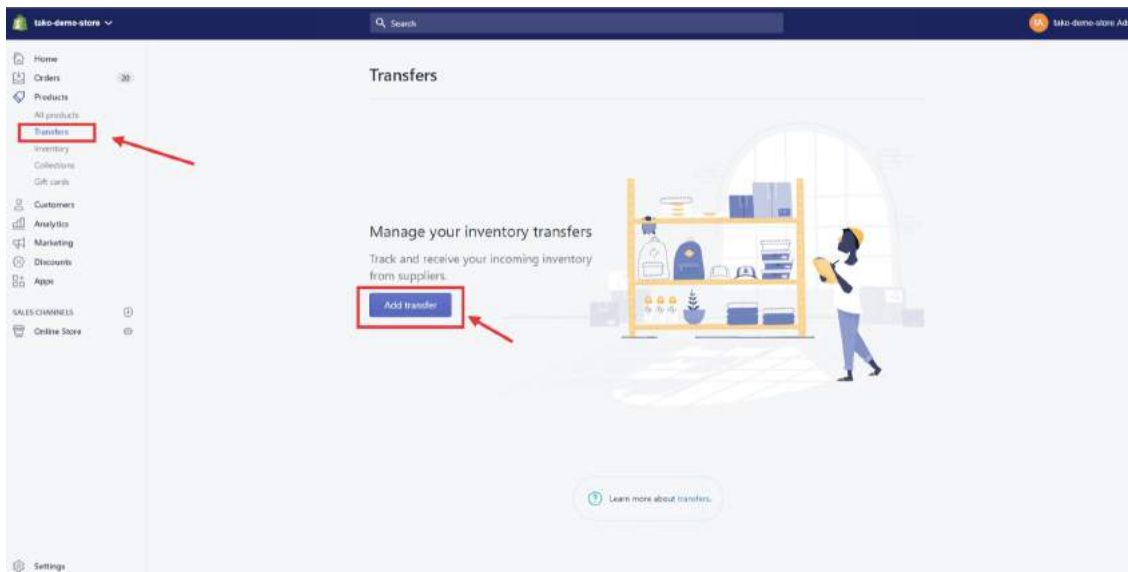
Transfers can help you to manage your purchase orders and inventory in several ways:

- You can log incoming inventory after you’ve submitted and confirmed your purchase order with your supplier.
- You can include whether you’ve received full or partial inventory, which allows you to process inventory at your own pace.
- Your product inventory is updated automatically after you received the items from your supplier.
- You can see the number of incoming items and their expected arrival date right in the products’ details.

Note: You can’t use transfers to move inventory between locations. You also can’t create transfers for products that use a third-party fulfillment service.

To create a Transfer:

Step 1. Click the “Add Transfer” button.

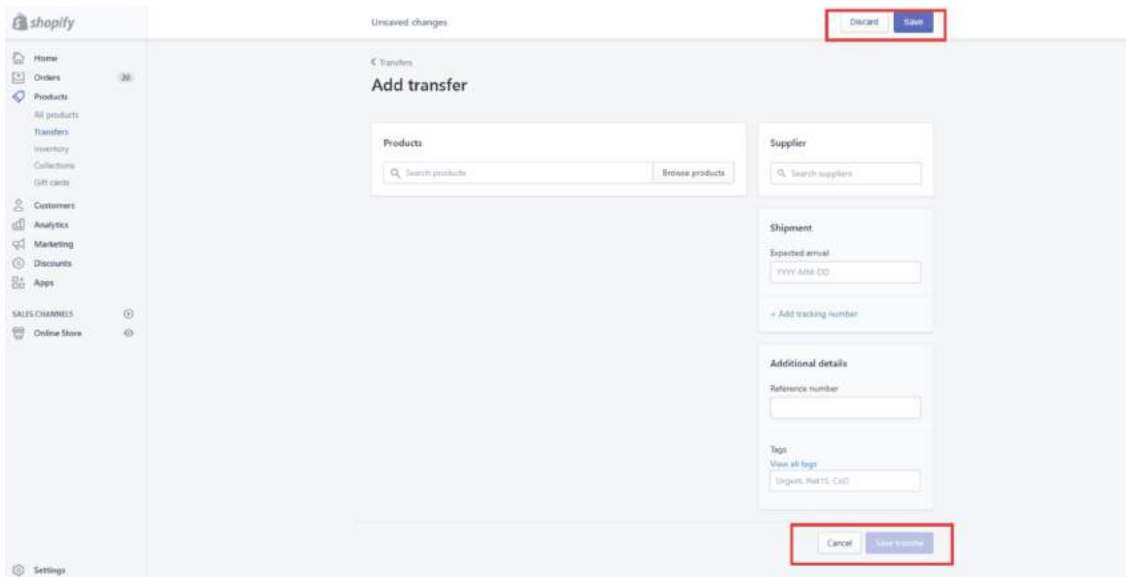


Step 2. Fill out the appropriate fields on the following page:

If you want to enter the name of your supplier, then select one in the Supplier section. You can add a **supplier** by clicking **Create new supplier** and then entering your supplier's contact and location information.

In the **Products** section, either enter the name of the product that you want to add to your transfer, or click **Browse products** to view a list of your store's products and collections.

You can save your changes either by clicking the **Save** button in the upper right or the **Save transfer** button in the lower right.

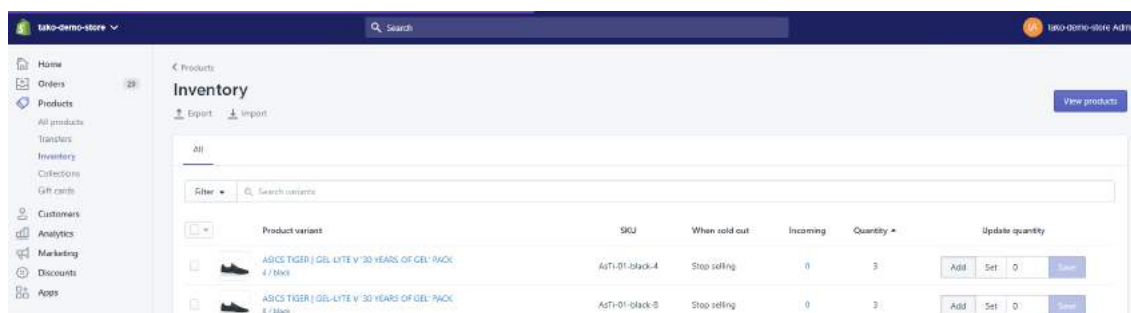


Inventory

URL </admin/products/inventory>

Your inventory is the quantity of a particular product you have available for sale; for example, if you have 30 shirts of Style X and 20 shirts of Style Y, you have 50 pieces of inventory in total but only 30 pieces of inventory of X and 20 pieces of Y available to sell.

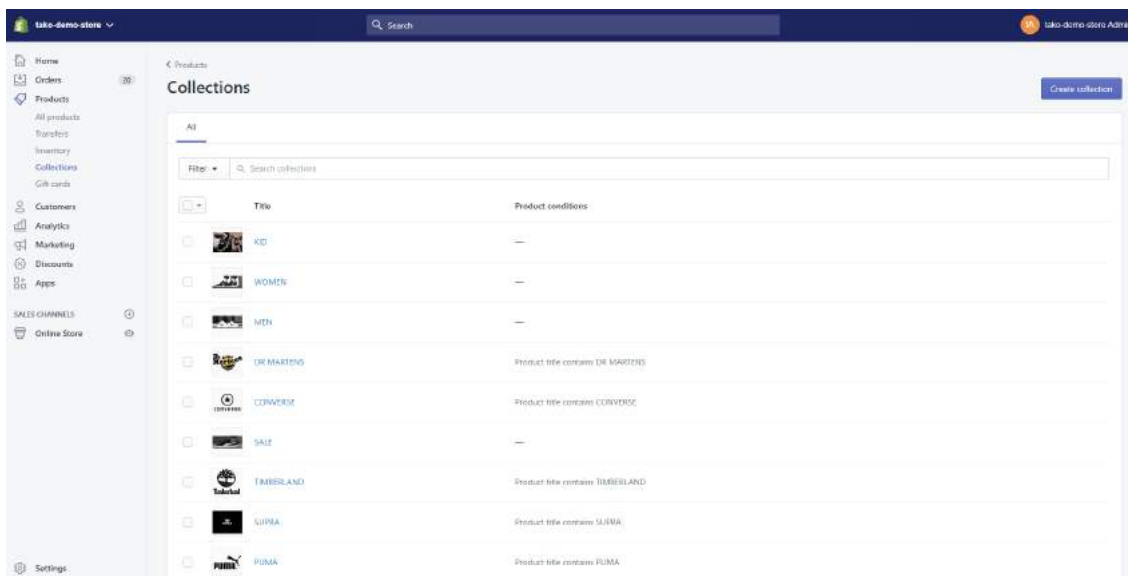
In this section of your Shopify Admin under the “Products” menu header, you can set up inventory tracking, view your current inventory, and adjust your inventory counts. You can also check the inventory history for a particular product or variant, and export or import inventory info as a CSV file.



Collections

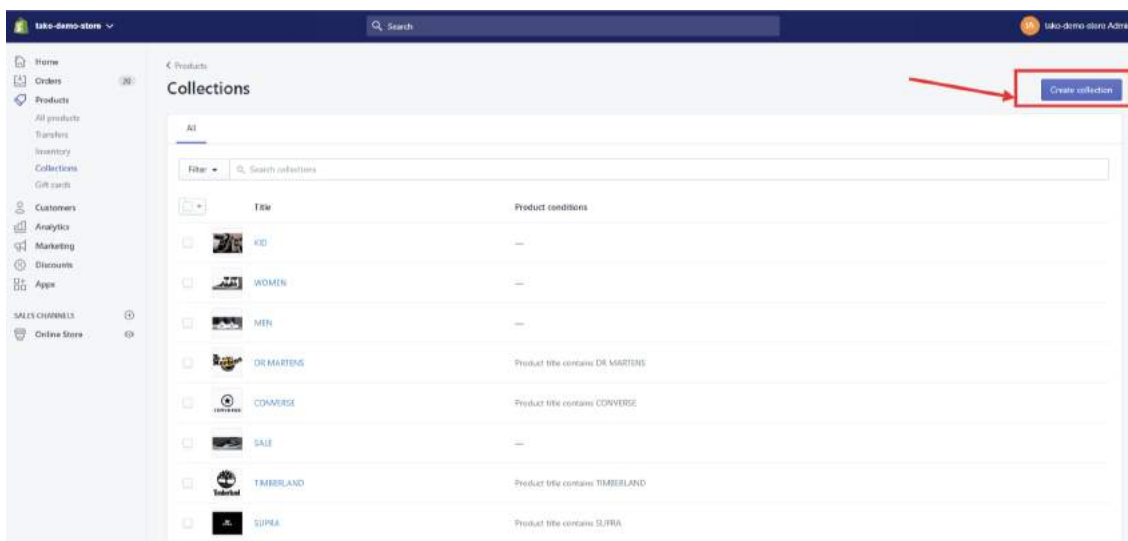
URL </admin/collections> 

The next tab under the “Product” menu is **Collections**. This is a neat Shopify feature that groups products by type and presents them as a “category” in your store. (Remember, you can organize your products by collection in the ‘Add Product’ stage, but first have to create the collection itself here.)



Creating a new collection

Step 1. Click the “Create Collection” button at the top right corner.



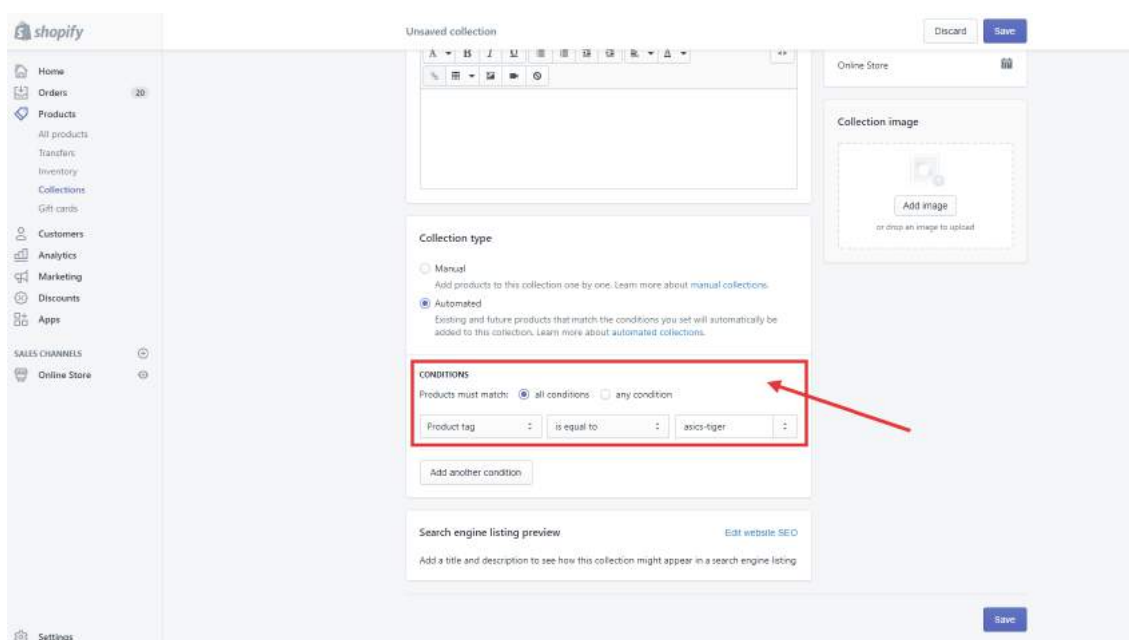
Step 2. Fill in all the information about the collection you're creating.

Step 3: Decide how products will be added to this collection by denoting the collection type.

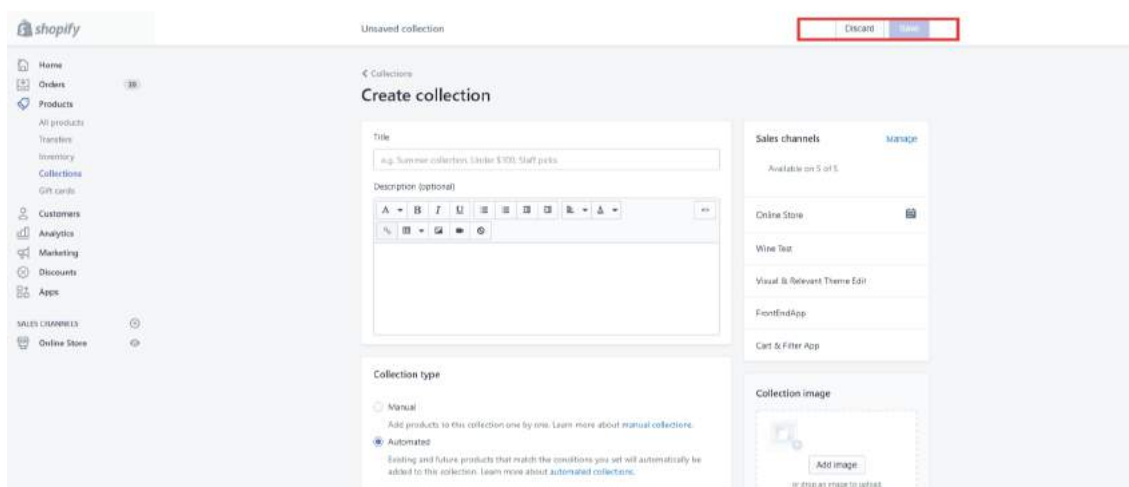
If its type is **“Manual”** you'll need to add products to the collection one by one.

If its type is **“Automatic”** you can define specific conditions so that products can be automatically assigned to the correct collection.

Conditions you can use include: product title, type, vendor, price, tag, compare at price, weight, inventory stock, and variant's title. The most frequently used condition is product tags.



Step 4. Click **“Save”** at the top.





Tako Agency Pro Tip:

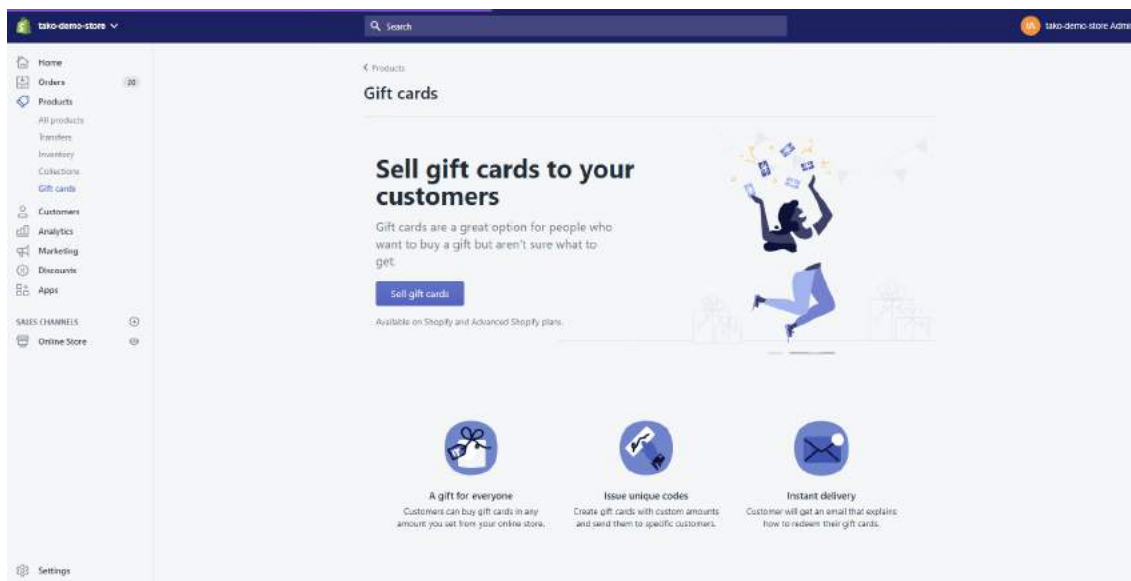
Collections (categories) inside Shopify are a dynamic feature you can customize to your needs. Maybe you want to have specific items displayed as "related products" at the bottom of a product page? You can designate a collection stocked with just those products, and take advantage of an opportunity to upsell.



Gift Cards

URL /admin/gift_cards

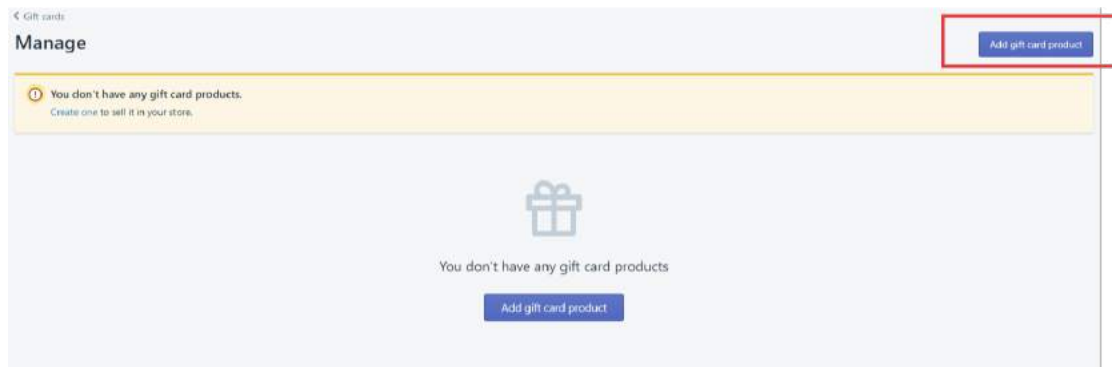
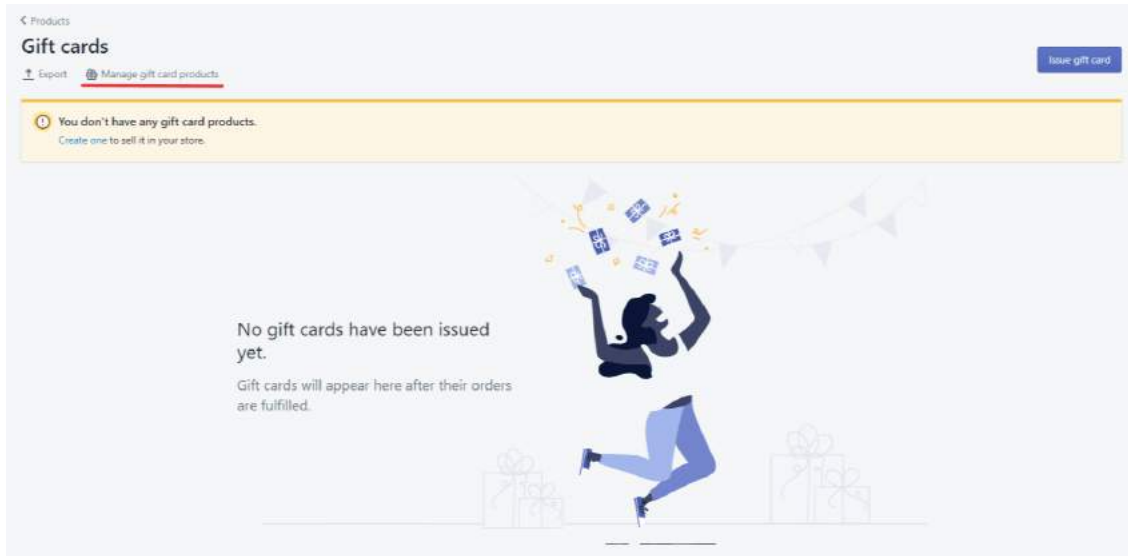
We're all familiar with gift cards, right? The perfect thing to give someone when you don't know what else to buy! In this section, you can add, update, and manage gift cards for your store.



To add a gift card product:

Step 1. Click the “Sell gift cards” button.

Step 2. Click “Manage Gift Card Products” link at the top left corner and then click the purple “Add gift card product” button in the top right corner.



Step 3. Fill in the appropriate gift card information and click “**Save gift card product**” in the bottom right.

The screenshot shows the Shopify Admin interface for adding a new gift card product. The left sidebar contains navigation links for Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, and Settings. The main content area is titled 'Add gift card product' and includes the following sections:

- Title:** A text field containing 'Birthday gift card'.
- Description:** A rich text editor with a toolbar and a large text area.
- Images:** A section with an 'Upload image' button and a 'Drop files to upload' area.
- Denominations:** A table with four rows, each showing a denomination (\$10.00 USD, \$25.00 USD, \$50.00 USD, \$100.00 USD) and buttons for 'Edit' and 'Delete'.
- Search engine listing preview:** A section with a 'Search engine listing preview' heading and a 'Add a title and description to see how this product might appear in a search engine listing' instruction.

On the right side, there are several sections:

- Product availability:** A section with a 'Manage' link and a 'Product availability' heading.
- Organization:** A section with a 'Product type' dropdown (set to 'Gift Card') and a 'Vendor' dropdown (set to 'Nikola's Electrical Supplies').
- Collections:** A section with a heading and a note about collections.
- Tags:** A section with a 'View all tags' link and a text input field.
- Theme templates:** A section with a 'Product template' dropdown (set to 'product') and a note about the template.

At the bottom right, there are two buttons: 'Cancel' and 'Save gift card product', with the latter highlighted by a red box.

Tako Agency Pro Tip:

Gift cards are always a nice--and profitable--item to have in your store, and they take so little effort to set up. If you're an apparel company, you're likely to benefit from gift cards a lot more as your brand grows and people start gifting your products to each other.

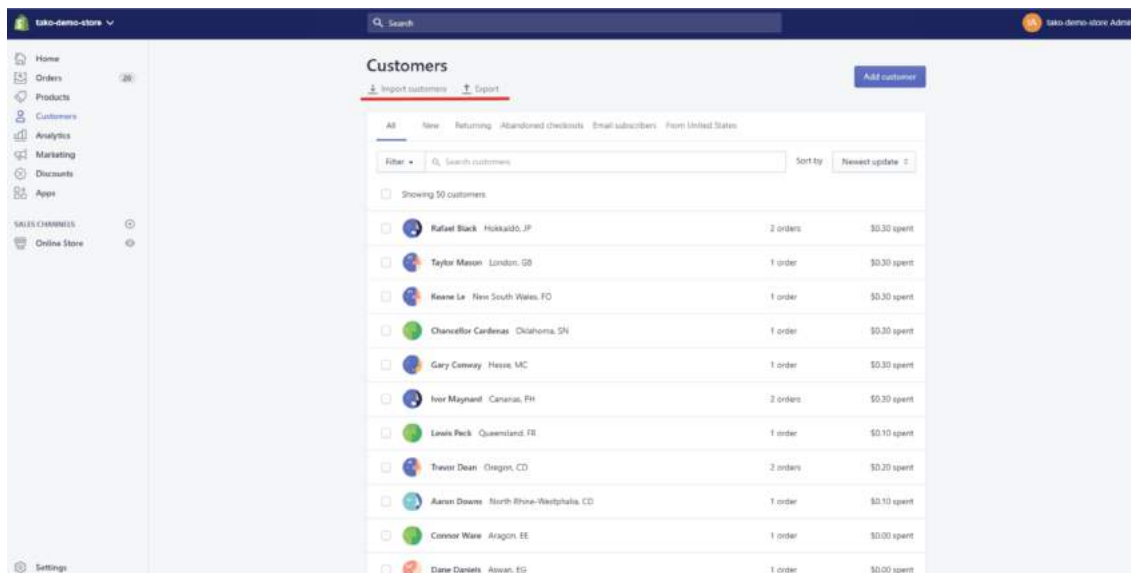
Fun fact: did you know that over \$1 Billion worth of gift cards go unused every single year?

Customers

URL </admin/customers> 

Now that we've gotten all your products and inventory taken care of, it's time to talk about the people who're going to buy all of it--your customers! You can manage your customers in the **Customers** section of your Shopify Admin panel.

Customers will be listed here automatically when they place an order. If a customer wants to make an order outside of your store (such as in person with you) then you might need to manually create a new customer profile and generate the order that way to keep all your records together.



To manually create a customer:

Step 1. Click the purple **“Add Customer”** button in the top right corner.

Step 2. There are two main sections on the “Add Customer” page: Customer Overview and Address; both are pretty self-explanatory. Fill in the appropriate information and Click **“Save.”**

shopify

Unsaved changes

Cancel Save

Customers

Add customer

Customer overview

First name Last name

Email

Phone number

☐ Customer accepts marketing

☐ Customer is tax exempt

Address

The primary address of this customer

First name Last name

Company

Address

Apartment, suite, etc.

City

Country State ZIP code

United States Alabama

Phone

Notes

Add notes about your customer.

Note

- If the customer has agreed to receive newsletters, check the “**Customer accepts marketing**” box.
- If the customer should be exempt from all taxes, check the “**Customer is tax exempt**” box.

shopify

Unsaved changes

Cancel Save

Customers

Add customer

Customer overview

First name Last name

Email

Phone number

☐ Customer accepts marketing

☐ Customer is tax exempt

Address

The primary address of this customer

First name Last name

Company

Address

Apartment, suite, etc.

City

Country State ZIP code

United States Alabama

Phone

Notes

Add notes about your customer.

Note

Analytics

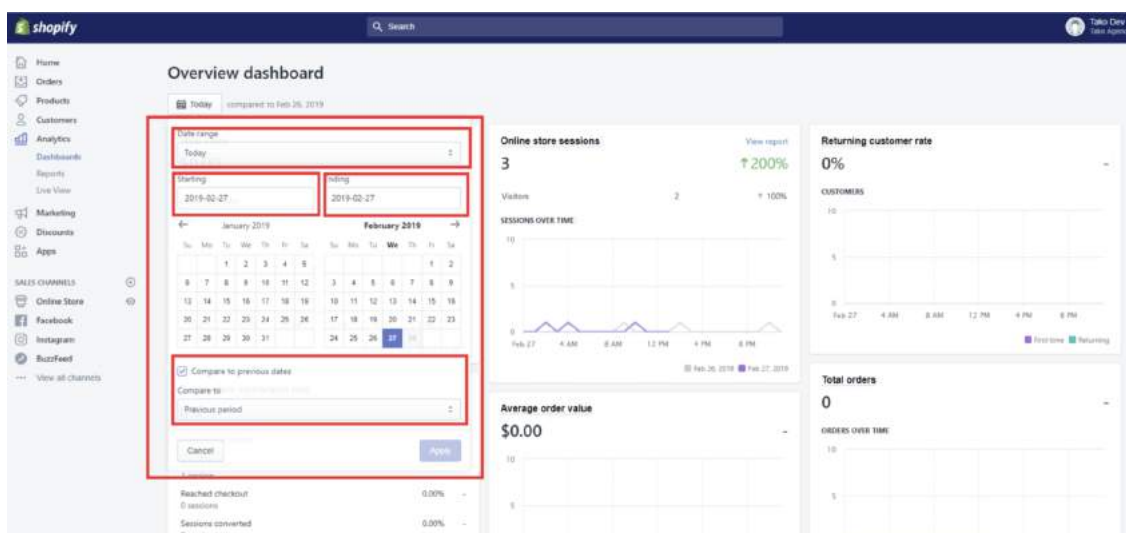
Under the “Analytics” menu header you’ll see three main areas: Dashboards, Reports, and Live view.

Dashboards

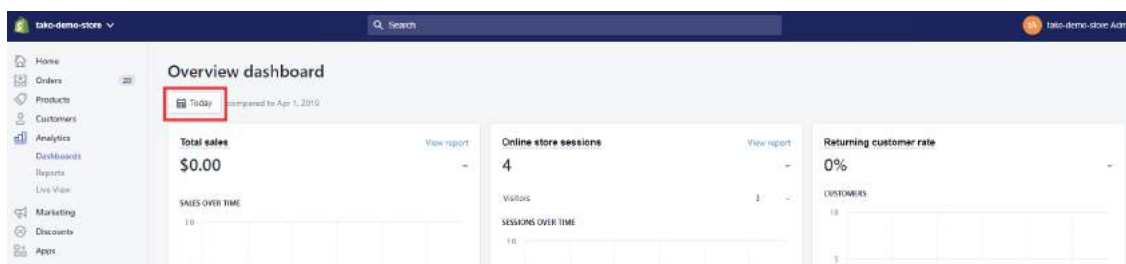
URL </admin/dashboards> 

The Dashboard is exactly what it sounds like--an at-a-glance page that shows Sales, Orders, and other visitor data.

To change the date or period of time you’d like to review, just click the “Today” icon in the top left corner. You’ll see a dropdown window.



That’ll allow you to select a preset date range (e.g. today, yesterday, last 7 days, last month, etc.) or a custom range using the “starting date” and “ending date” features. Check the **Compare to previous dates** checkbox if you want to compare the current report to an earlier period.



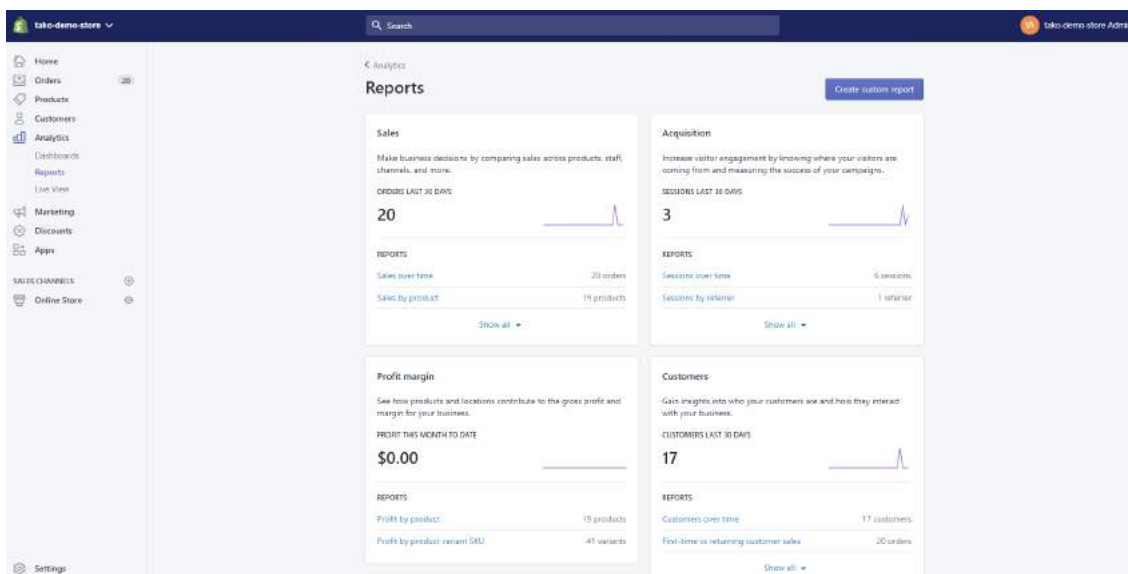
Reports

URL </admin/reports>

This page organizes various data by type. Shopify reports are divided into categories based on the kind of information that they show. The types of reports you'll be able to access will depend on your Shopify plan:

Analytics and reports (for details, click the links)	Shopify Lite	Basic Shopify	Shopify	Advanced Shopify	Shopify Plus
Overview dashboard	✓	✓	✓	✓	✓
Live View	✓	✓	✓	✓	✓
Finances reports (including taxes and payments)	✓	✓	✓	✓	✓
Acquisition reports	-	✓	✓	✓	✓
Behavior reports	-	✓ (5 of 6)	✓	✓	✓
Marketing reports	-	✓ (1 of 5)	✓	✓	✓
Sales reports	-	-	✓ (13 of 14)	✓ (13 of 14)	✓
Profit reports	-	-	✓	✓	✓
Customers reports	-	-	✓ (5 of 7)	✓	✓
Custom reports	-	-	-	✓	✓

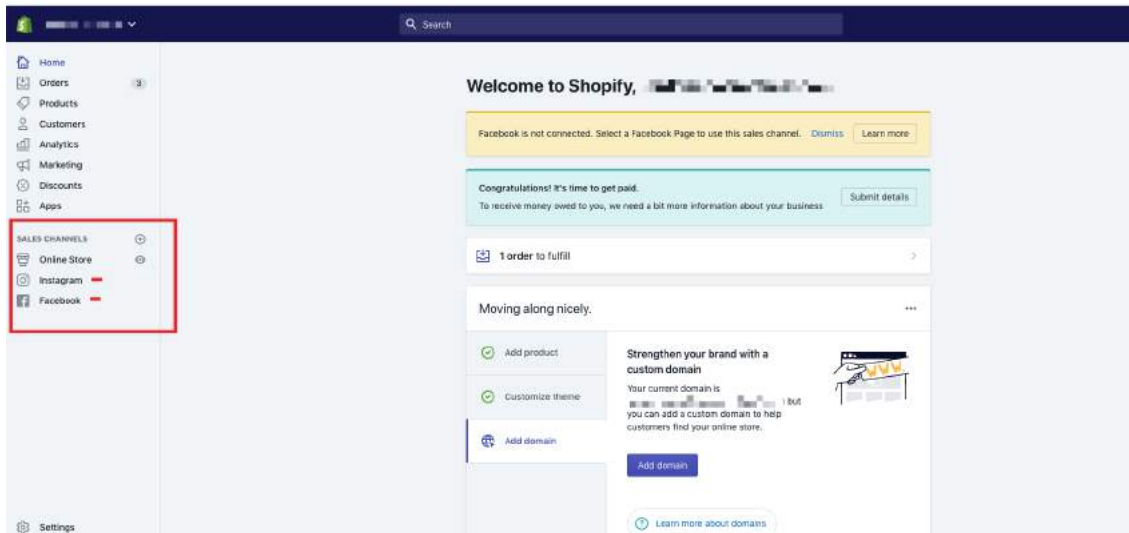
If your plan is **Advanced Shopify** or **Shopify Plus**, you can create your custom report section here. You can have a maximum of 1000 sections.



Live View

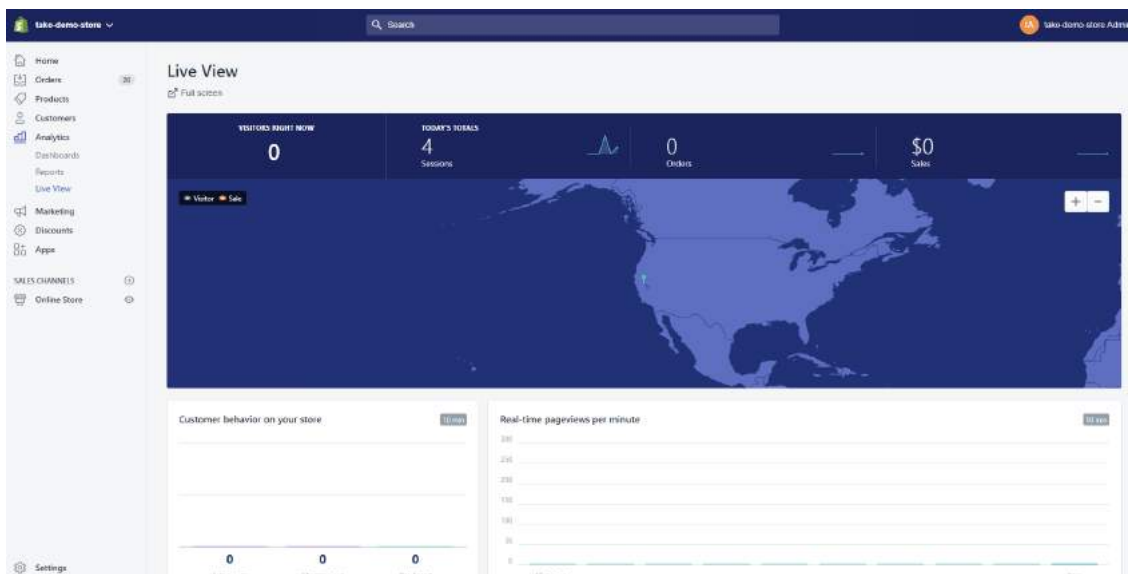
URL </admin/dashboards/live> 

When you use an online store channel, the Live View page gives you a neat real-time view of the activity happening on your site. There is a map to show where the action is coming from and some key metrics to let you know what's happening right now.



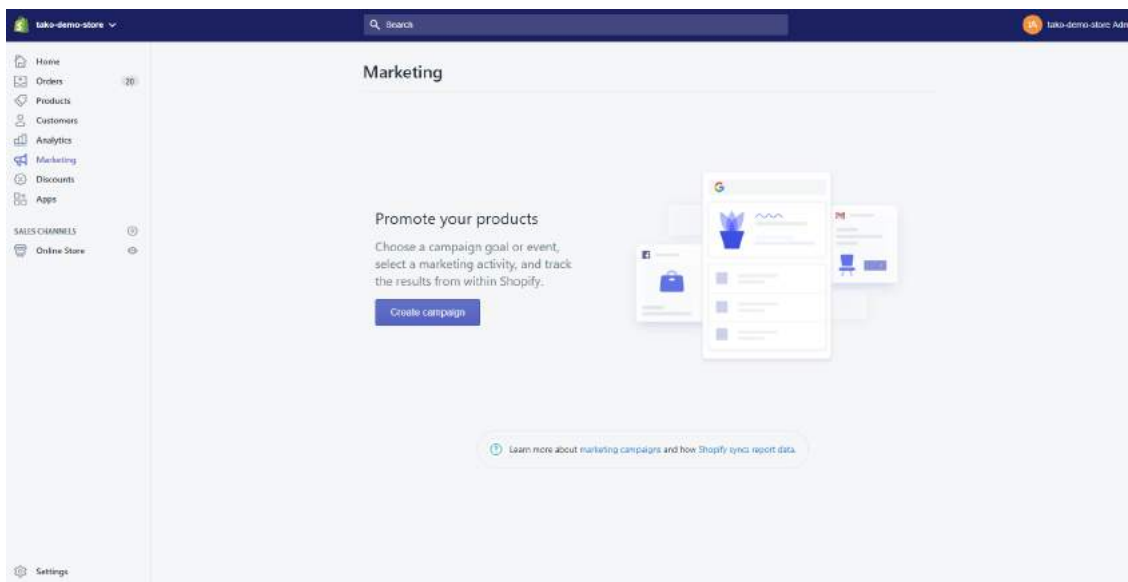
Information shown in Live View:

- Visitors right now
Number of visitors who have been active on your online store in the past 5 minutes.
- Today's totals
Total number of sessions and orders for today, as well as the total sales for today.
- Current behavior on your store
Number of visitors to your online store in the last 10 minutes that have added items to their cart, reached the checkout, or made purchases.
- Real-time pageviews
Number of pages of your online store that were viewed by visitors over the past 10 minutes.



Marketing

URL </admin/marketing>



Next up in your Shopify admin menu is the “Marketing” section. As a business owner, you already know that marketing is going to be a critical component to your success. It doesn’t matter how good your product or service is; if no one knows about it, they can’t buy it! A great marketing plan will increase traffic to your store and convert visitors into customers.

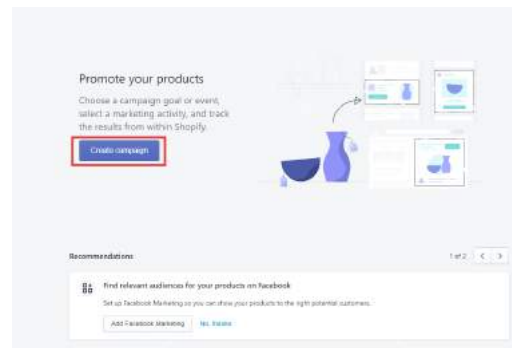
With Shopify (on the Basic Shopify plan or higher), you don't have to go it alone. There are some great built-in marketing campaigns right at your fingertips! Here's where you begin.

One of the most commonly used marketing campaigns involves advertising through Google Ads, Facebook Ads, Instagram Ads, and/or Pinterest Promoted Pins. You can create marketing campaigns for Google and Facebook on this Marketing page.

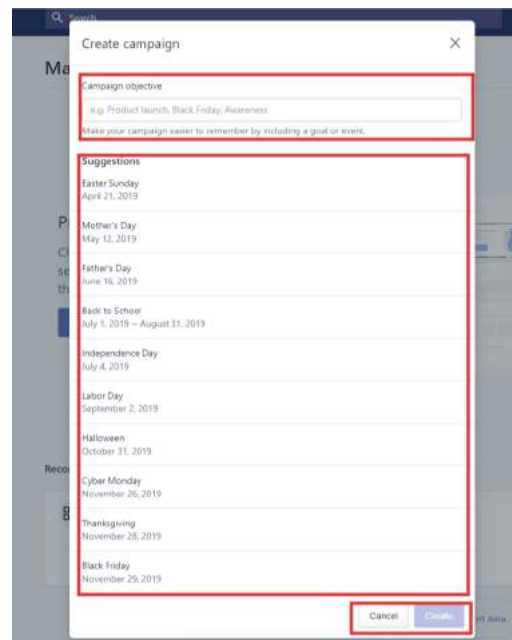
To create a marketing campaign:

You need to have a marketing app installed and be on the Basic Shopify plan or higher to create marketing campaigns and activities.

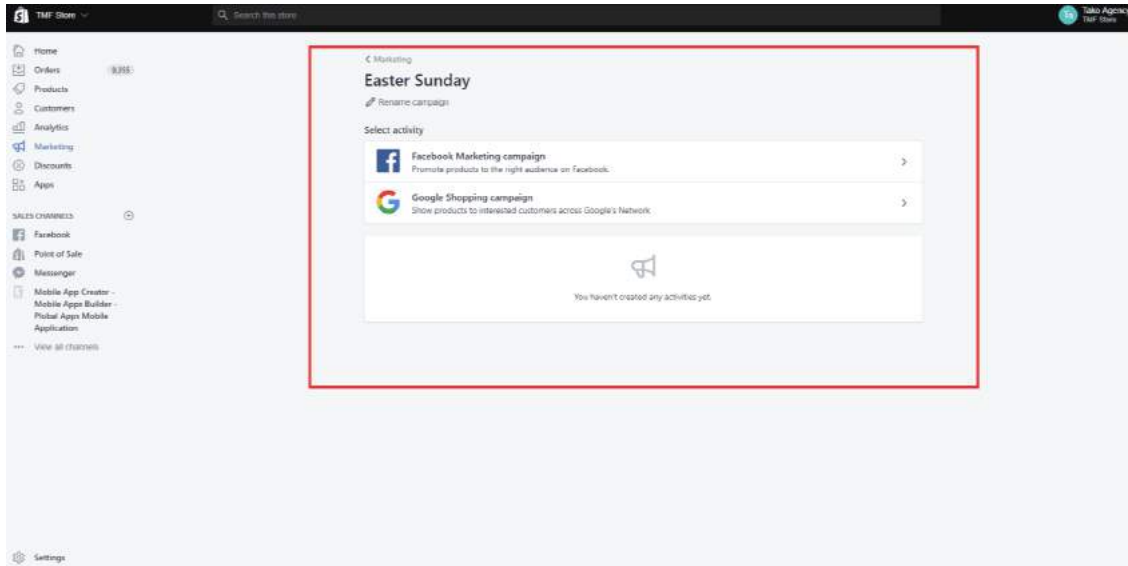
Step 1. Click the “Create Campaign” button.



Step 2. Input your Campaign Objective (what the marketing plan is centered around--a goal or event, usually) or choose one from the Suggestions List and click “Create.”



After you create a new campaign you'll see this page, which is essentially your campaign dashboard. Here you can link Facebook marketing and Google Shopping elements by following the prompts to connect your respective accounts.



Tako Agency Pro Tip:

This feature is something new that Shopify recently released, and it's extremely useful to have this directly inside your Shopify admin. If you're not a "marketing guru" yet this feature can get you kicked off with ad spending and tracking your ROI.

Discounts

URL </admin/discounts/new>

Offering a discount is often a great way to entice people to your website when you first launch or unveil new products.

Shopify has done a great job with making this as straightforward as possible, so there isn't much to explain here! Each section is organized logically to guide you through the process, from generating or naming the code to specifying restrictions.

Discounts

Create discount code

1. Discount code Generate code

DISCOUNT TEST

Customers will enter this discount code at checkout.

2. Options

Discount type

- ☒ Percentage
- ☐ Free amount
- ☐ Free shipping
- ☐ Buy X Get Y

Discount value %

3. Applies to

- ☒ Entire order
- ☐ Specific collections
- ☐ Specific products

4. Minimum requirement

- ☒ None
- ☐ Minimum purchase amount
- ☐ Minimum quantity of items

Summary

DISCOUNT TEST

PERFORMANCE

Discount is not active yet.

CAN'T COMBINE WITH OTHER AUTOMATIC DISCOUNTS

Customers won't be able to enter a code if an automatic discount is already applied at checkout.

At the bottom of the discounts page, you will also have the ability to set date parameters for a specific discount. Start and end dates are perfect for running a promo for a specific amount of time, like holidays.

Minimum requirement

- ☒ None
- ☐ Minimum purchase amount
- ☐ Minimum quantity of items

Customer eligibility

- ☒ Everyone
- ☐ Specific groups of customers
- ☐ Specific customers

Usage limits

- ☐ Limit number of times this discount can be used in total
- ☐ Limit to one use per customer

Active dates

Start date

Start time (EST)

☐ Set end date

Summary

DISCOUNT TEST

PERFORMANCE

Discount is not active yet.

CAN'T COMBINE WITH OTHER AUTOMATIC DISCOUNTS

Customers won't be able to enter a code if an automatic discount is already applied at checkout.

Tako Agency Pro Tip:

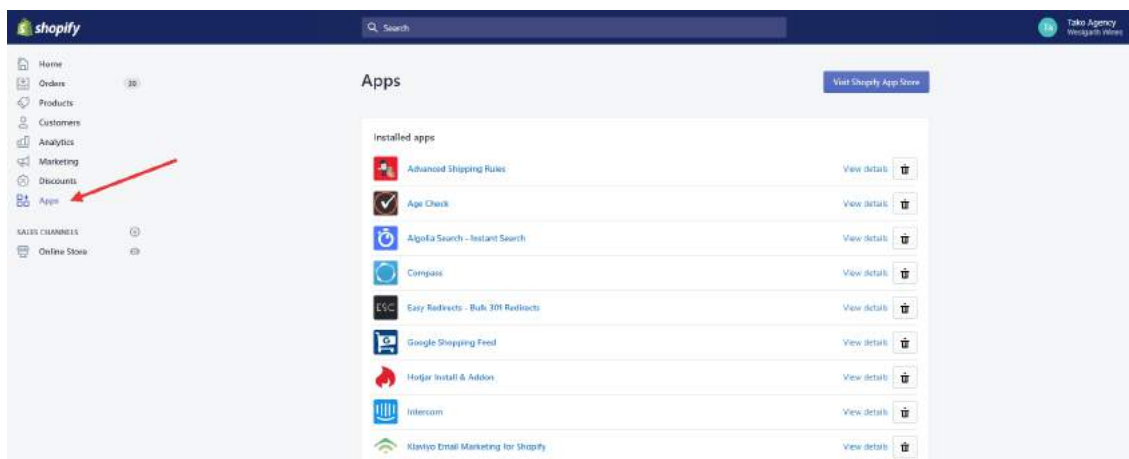
Discounts are a great way to bring people to your site. Deals like free shipping, buy one get one free, and so on are all great promotions to incentivize your customers to shop. When setting up your coupons, you have the option to directly share a link to any social outlet or email. When someone clicks on it, the coupon code will be automatically applied at checkout. This seamless integration provides a smooth user experience and avoids the hassle of manually typing in a code at checkout.

Apps

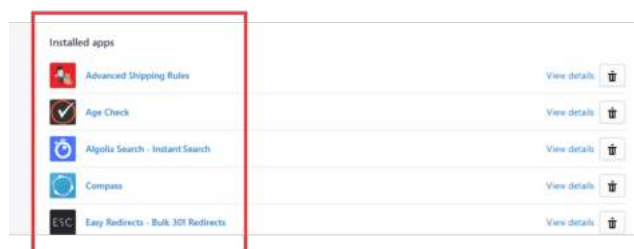
URL </admin/apps> 

Shopify apps can help you fine-tune your business operations, integrate with external services, and add features to your Shopify admin. You can find them in the Shopify App Store. <https://app.shopify.com>

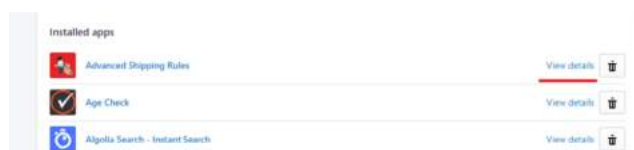
In the “Apps” section of your Shopify Admin panel, you’ll see a list of all the apps you’ve installed onto your store and can configure the appropriate settings. If you find you’re missing something, click the **“Visit Shopify App Store”** button in the upper right to check out new apps.



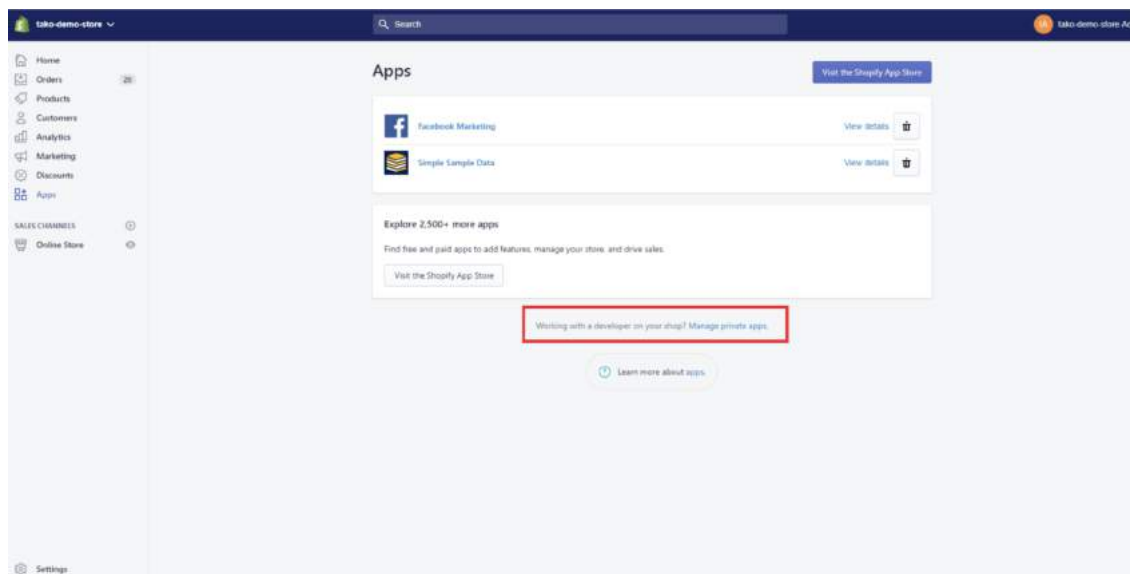
To manage an app, just click on it and the app configuration page will open.



To view the details, click “View details” link.



You can also use private apps to add features to your Shopify store, access your store's data directly using Shopify's APIs, or extend your online store to other platforms using custom storefronts.



Private apps can help you:

- Build an importer to migrate your data from Magento or another provider to Shopify.
- Integrate your store's data with a custom solution you're using to manage orders, products, or inventory outside of Shopify.
- Offer products from your Shopify store on a custom storefront, like a mobile app, website, or video game.

If your store is on the trial plan, you're limited to creating five private apps. Otherwise, you can create as many private apps as you need.



Tako Agency Pro Tip:

There is an abundance of apps in the Shopify App Store that can help you be more successful with your business in many ways.

Some of the most common examples are:

- Custom product configurations
- Cart page features (such as suggesting related items for upselling).
- Post-purchase share links so that your customers can share their purchase via social media

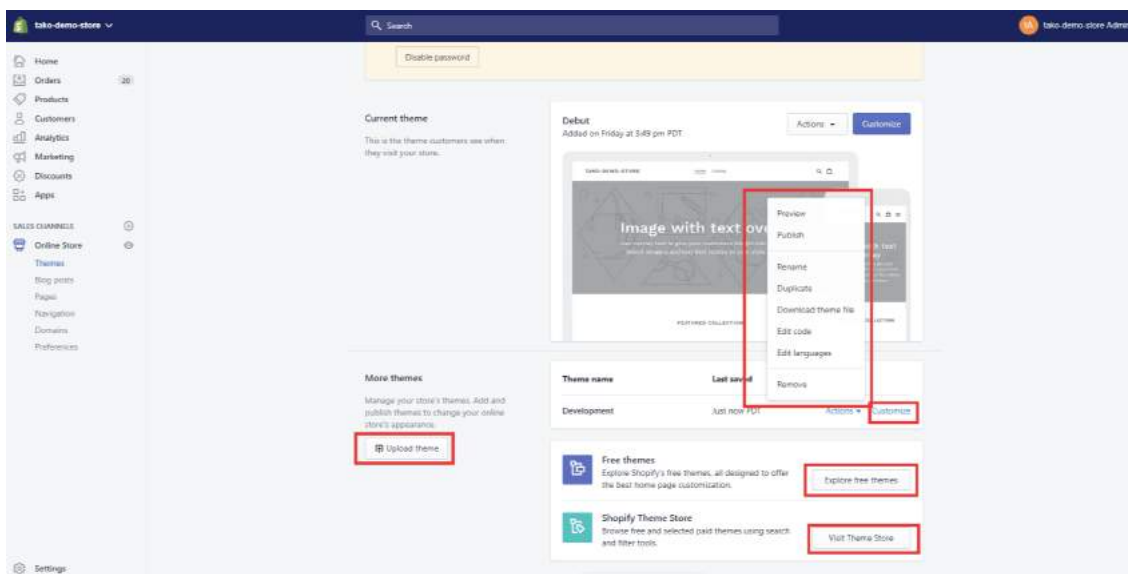
And more. Take some time to browse around and see what's right for you!

Online Store

Themes

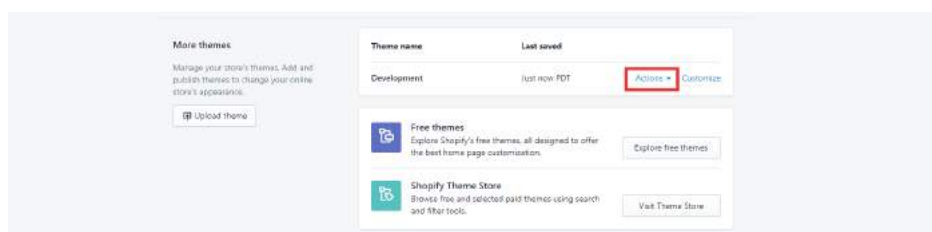
URL </admin/themes> 

In the “Themes” section, you can upload, import, customize, preview, and edit your store’s themes. Your theme is the digital layout of your store and the site, and dictates much of the brand appearance.



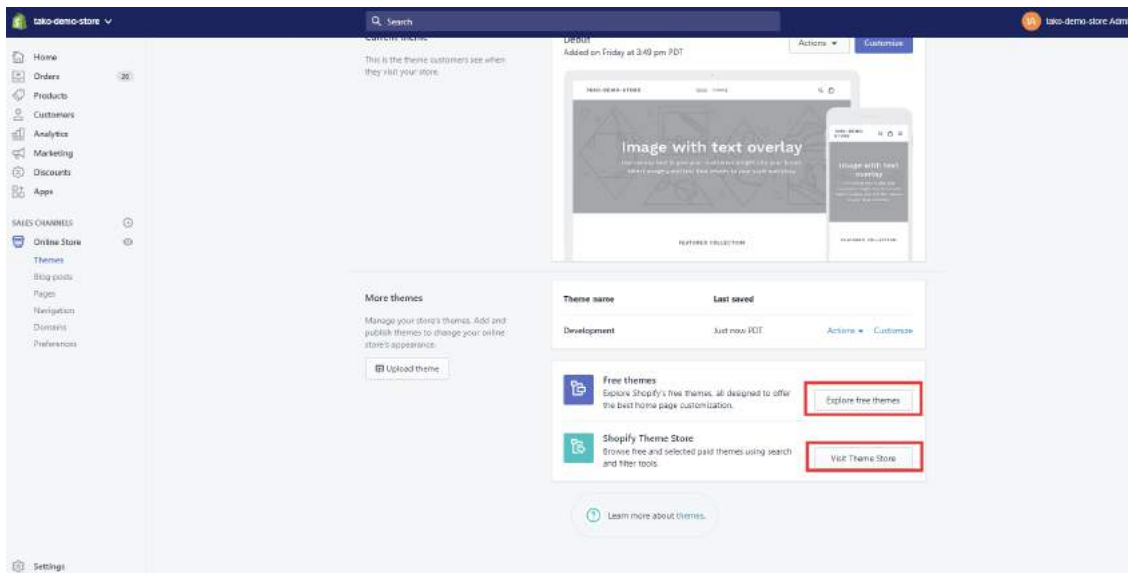
Here you can see two main sections: **Current theme** and **More themes**

- **Current theme:** This is the theme that is currently set on “live mode” and is what customers will see when they visit your store. You can directly customize your current theme, but it is not recommended because all changes should be tested before going live.
- **More themes:** Themes listed here are not live; they may be in development or older ones you’ve used before. To publish a theme in development, open the blue Actions dropdown and click Publish.



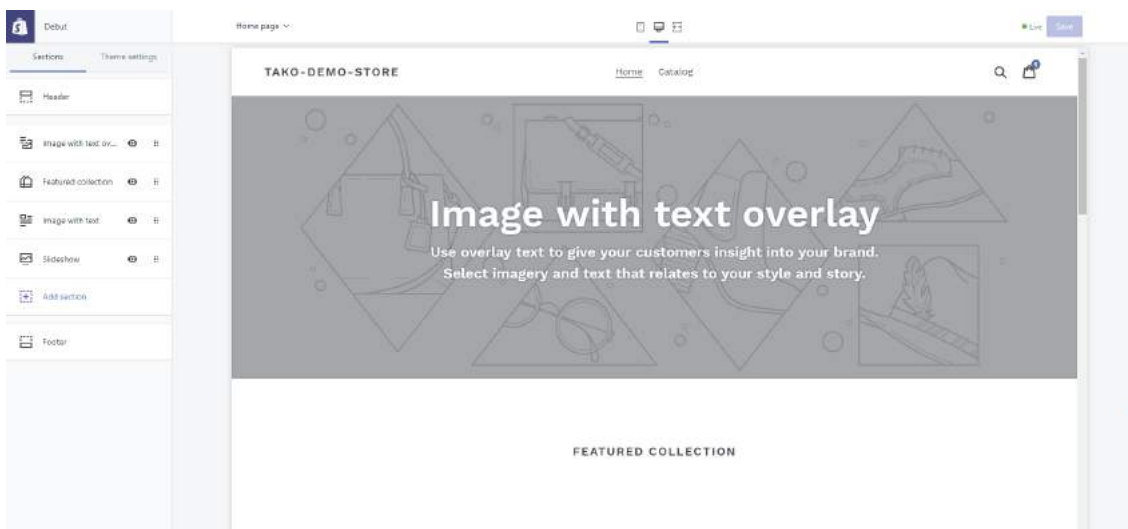
Purchasing a new theme

At the bottom of the themes page, you'll see links to free and purchasable themes. Browse free themes by clicking **Explore free themes** or review more advanced themes available for purchase by clicking **Visit Theme Store**.



Customizing your theme

To customize your theme, choose the theme to customize and click the blue "Customize" link. To make changes to your current theme, click the purple "Customize" button at the top right corner. The Customizer Page will open, and you'll have the option to customize various elements of the theme. How much you'll actually be able to customize will depend on the theme.



Blog Posts

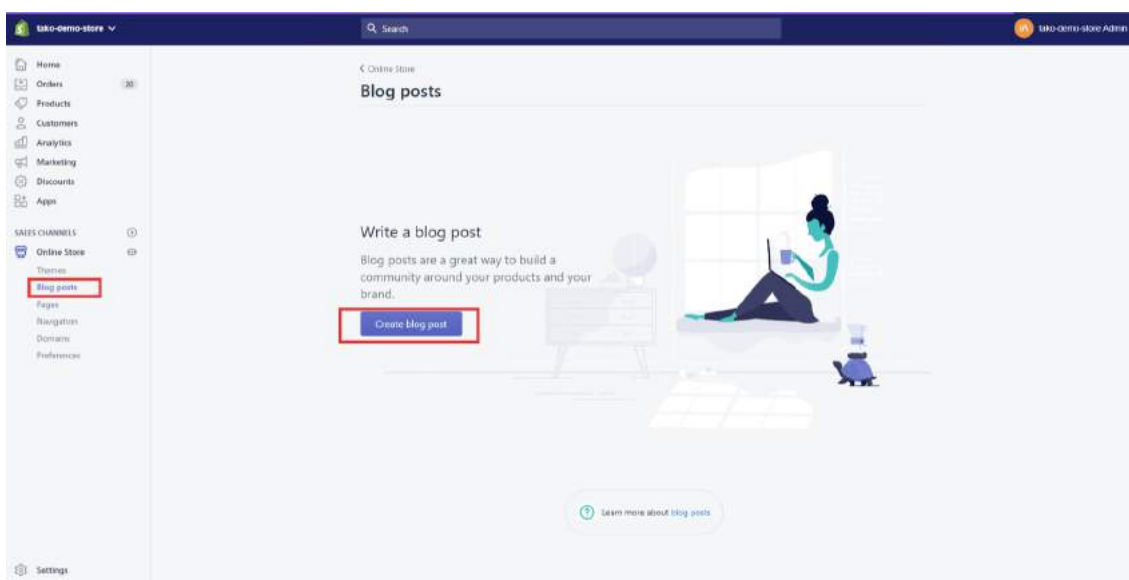
URL </admin/articles> 

Blog posts are a great way to build a community around your products and your brand. They're also fantastic SEO tools. Your posts can contain both text and images. You can choose to publish a post immediately, or set a specific publishing date in the future.

To create a blog post:

Step 1. From your Shopify admin, go to Online Store > Blog Posts.

Step 2. Click **Create blog post**



1. Title: You need to have a title to save the post.

2. Content: Enter the blog post content. This field uses the rich text editor, so you can format text, add images, embed video or other media, or insert a link.

3. Choose the settings for your blog post:

Author: From the dropdown menu, select the name of the person writing the post. Only the names of the account owner and staff members appear in the dropdown menu.

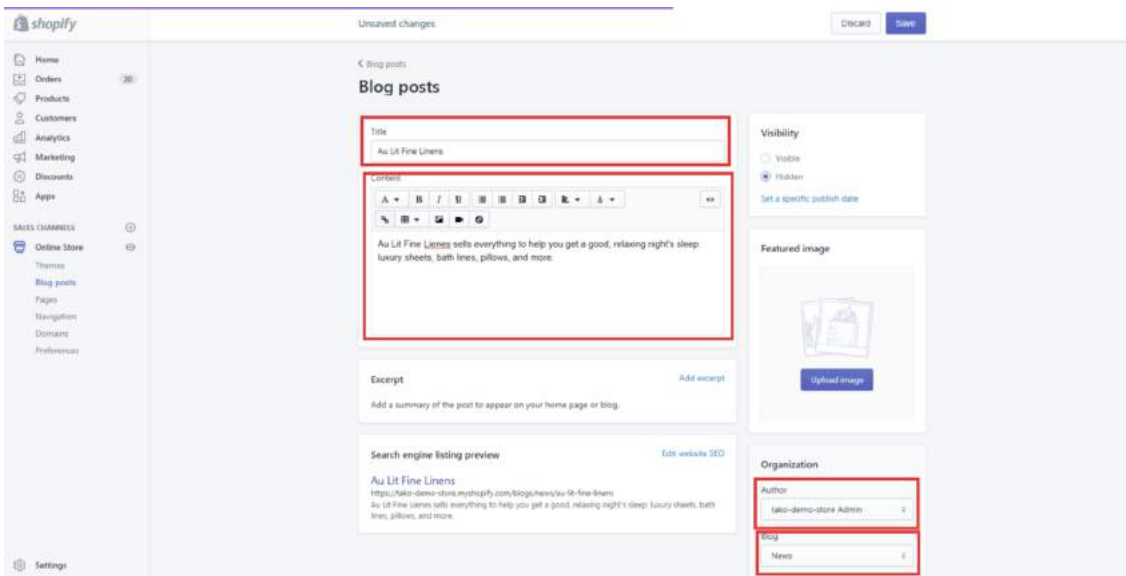
Blog: Select the name of the blog where the post will be published. If you don't want to publish to one of your existing blogs, then you can create a new blog in the dropdown menu.

Tako Agency Pro Tip:

You can create multiple blogs to organize content based on category or audience. For example, you can have one blog for new product announcements, another for tips & tutorials, another for customer stories, etc.

4: Blog posts are hidden by default and won't appear on your site you're ready to publish the post, at which time you can select **Visible** in the **Visibility** section.

5: Click **“Save”**.



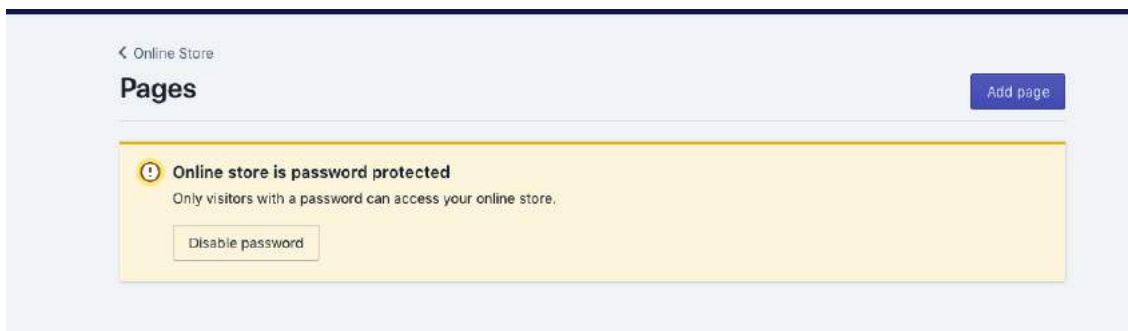
Pages

URL </admin/pages> 

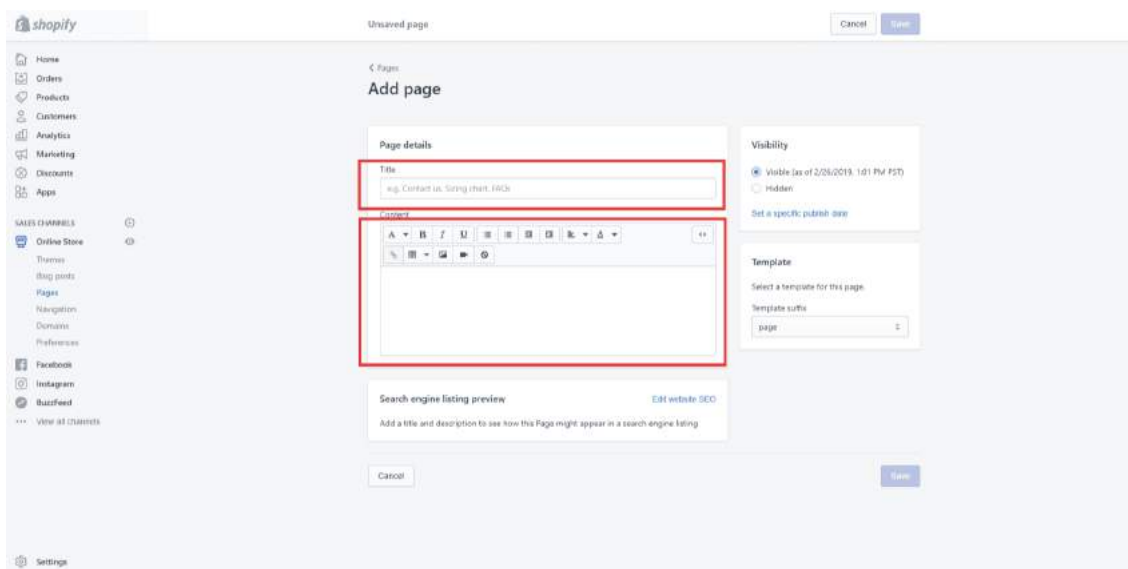
Here you can manage all the pages of your store and add new ones.

To add a Page:

Step 1. Click on the purple “Add Page” button.



Step 2. Complete the following fields:



1. Title: This should be a relevant title so that the page is easy to find in the Admin section; ex: Home, FAQs, etc.

The title you choose will be used as the default for the Search Engine page title, see here:

The screenshot displays the Shopify Admin interface for creating a new page. It is divided into two main columns. The left column contains the 'Page details' section with a 'Title' field (containing 'e.g. Contact us, Sizing chart, FAQs') and a 'Content' editor with various formatting tools. Below this is the 'Search engine listing preview' section, which includes a 'Page title' field (0 of 70 characters used), a 'Meta description' field (0 of 320 characters used), and a 'URL and handle' field (containing 'https://kkauto-live.myshopify.com/pages/'). The right column contains the 'Visibility' section with radio buttons for 'Visible' (selected) and 'Hidden', and a 'Template' section with a 'Template suffix' dropdown menu set to 'page'.

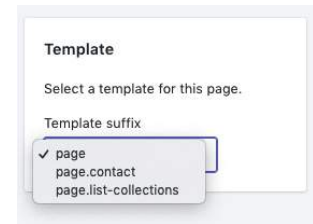
However, you aren't forced to use the default and can change it to something else in the "Search engine listing preview" section further down the page.

2. Content: Depending on what you want on this page, it's pretty simple to add content like text, images, videos, links, and so on.

If you are planning on doing some custom work (such as linking URLs, showing images by link, etc.) to this page, it should be done through the template code base.

3. Visibility: Allows you to decide if you're ready to publish this page and let it go live on your site, or if you'd like it to remain hidden for now. You can also program a specific publish date in the future, which is helpful if you're creating a promo landing page for a specific launch, for example.

4. Template: Depending on which theme you are starting with, there might be different options displayed here. Look at this as the section where you can use a template from one of your other pages (contact page, landing page, etc.) to create a new page with the same layout.



Further down the page, you'll encounter the search engine listing preview section.

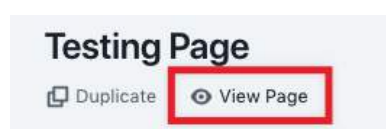
A screenshot of the 'Search engine listing preview' section in the Shopify admin. The section contains three input fields: 'Page title' (with the text 'Request Personal Data' and a character count of '41 of 70 characters used'), 'Meta description' (with a placeholder text about requesting personal data and a character count of '299 of 320 characters used'), and 'URL and handle' (with the text 'https://takoagency.com/request-personal-data'). Below these fields are two buttons: 'Delete page' and 'Save'.

Page Title: Choose something that's search friendly and describes the page in 1-3 words. This will factor into your site's Search Engine Optimization.

Meta Description: Make sure that you are only adding relevant search related info. It should be easy to read, friendly text. Use keywords that describe the page and the website overall.

URL and Handle: This should be 1-3 words related to the page, preferably a keyword from your page and/or website.

And finally... you can click the purple "Save" button in the bottom right. Once you save it, the page will refresh and you can click on "View Page" right at the top of the screen, to see what it looks like.

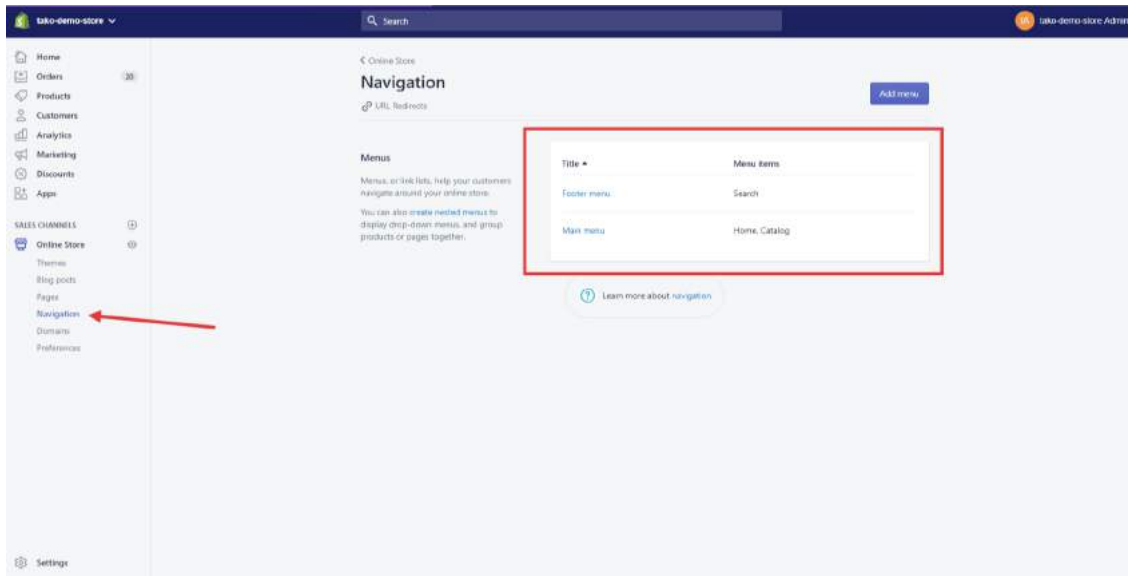


Notice that there is also a DUPLICATE button there. This just means that you can create an exact copy of this page, which is helpful when you're creating multiple similar pages.

Navigation

URL </admin/menus> 

Here you can manage the menus that appear on your store. Your online store has two default menus that appear on every page: the main menu and footer menu.



Default Menus

Main Menu: The main menu appears on every page of your online store and is probably the one you think of when you think about navigating around the pages of a site. It is usually displayed as items across the width of the header, or else as a list of items in a sidebar. A customer will go to your main menu to find your products and information about your business, like an "About" page.

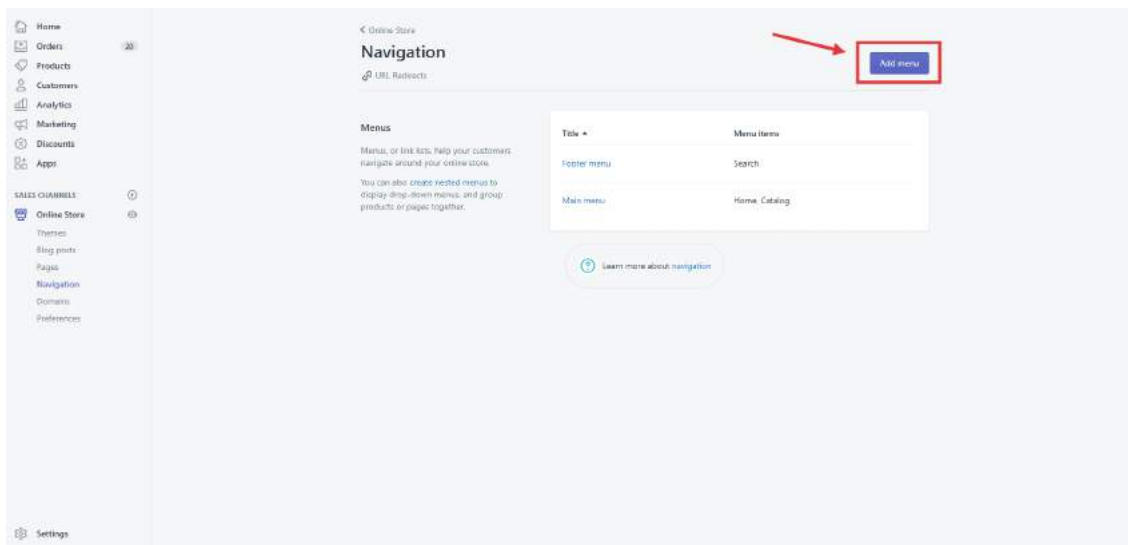
Footer Menu: The footer menu is usually displayed as items across the width of the footer. A customer will probably look at your footer menu to find information about your store policies and contact information.

Other Menus

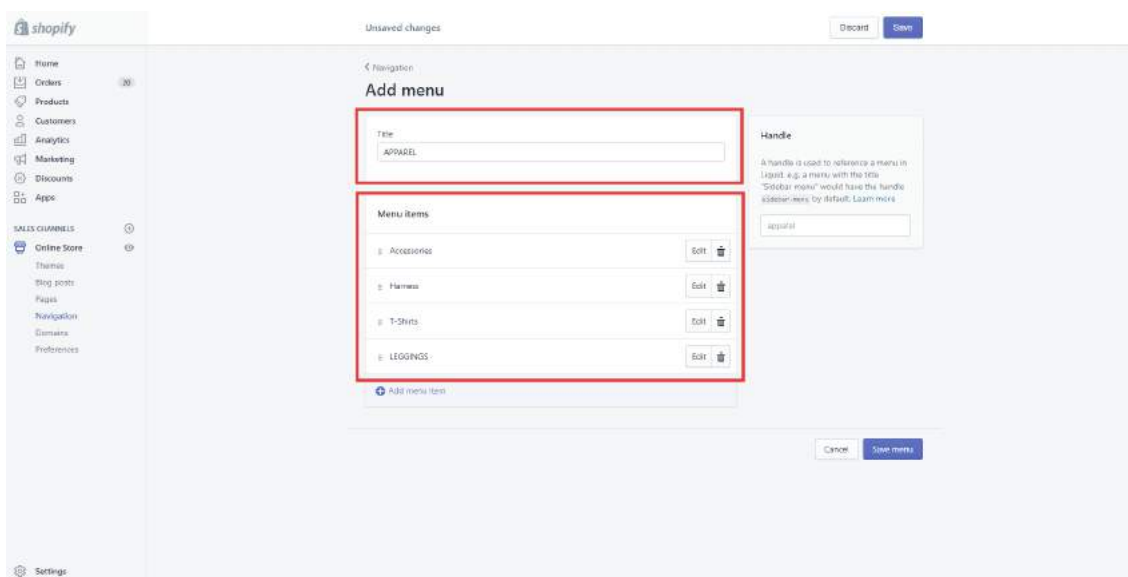
You can add more menus (category menus, menus for different pages, etc.) according to your requirements.

Add a New Menu

Step 1. Click “Add Menu” in the Navigation pane.



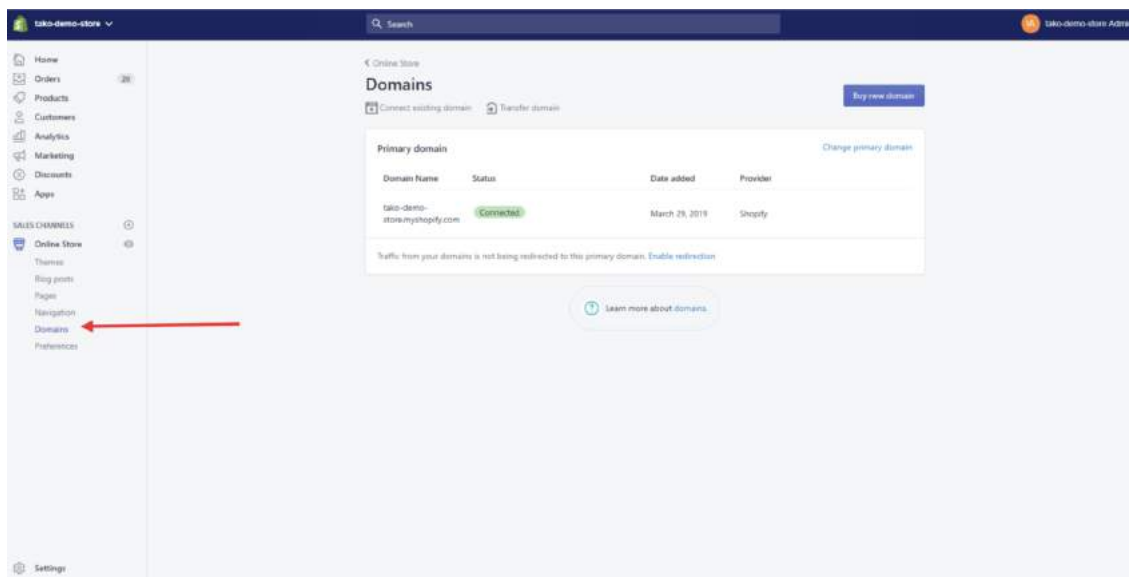
Step 2. Set the title and then click the “Add menu item” button to add new menu items as needed.



Domains

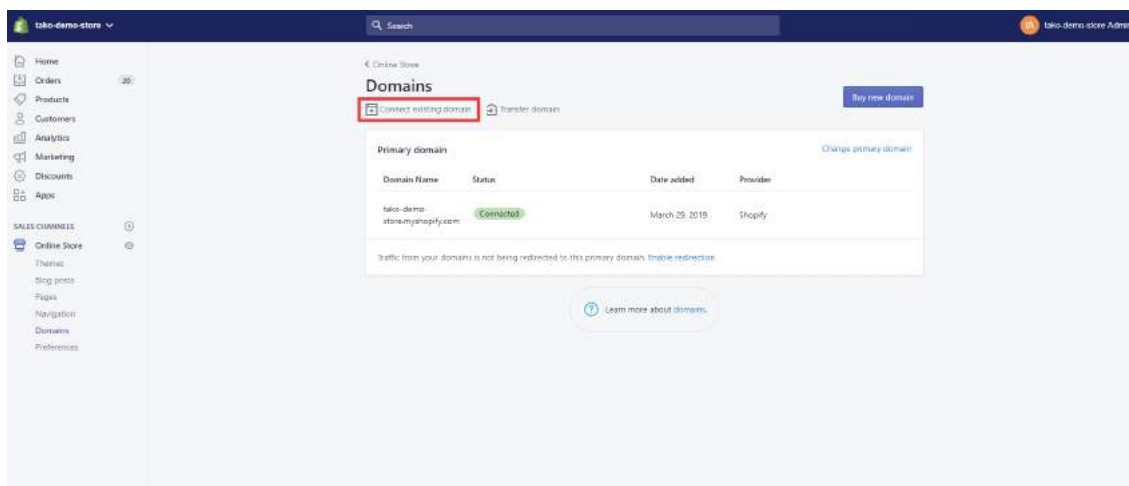
URL </admin/domains> 

Of course, you want to make sure that your store is connected to your domain! Your domain is the website address people will type into their browsers to find you; for example: www.takoagency.com. You can purchase your domain through a number of online companies, but we recommend GoDaddy because Shopify has an easy integration that will automatically (with your permission) pull in the domain.



Step 1. Purchase domain.

Step 2. Click on “Connect Existing Domain” in the upper left.



Step 3. Type in the domain you bought; ex: takoagency.com.

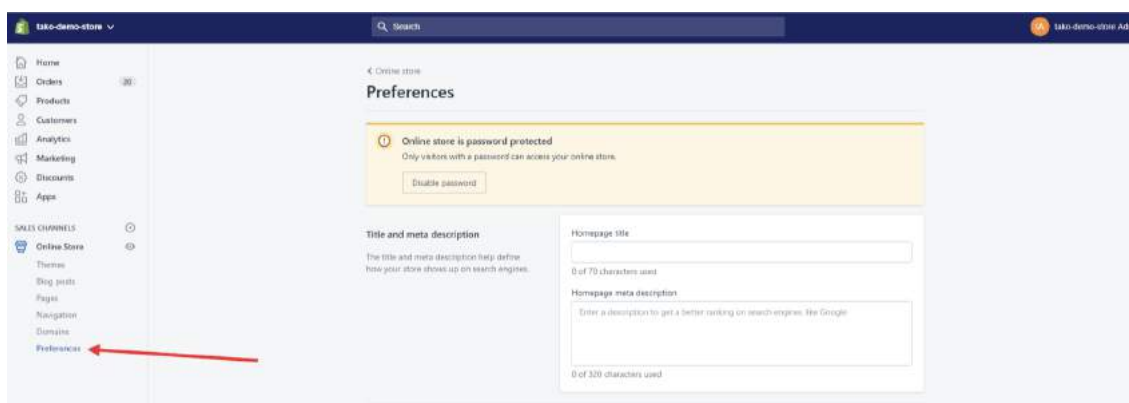
Step 4. Follow the ensuing prompts to make sure that it connects properly.

If you are using any other domain provider, you will be required to follow specific instructions to connect your domain. Here's an article that may help:

<https://help.shopify.com/en/manual/domains/add-a-domain/using-existing-domains/connecting-domains>

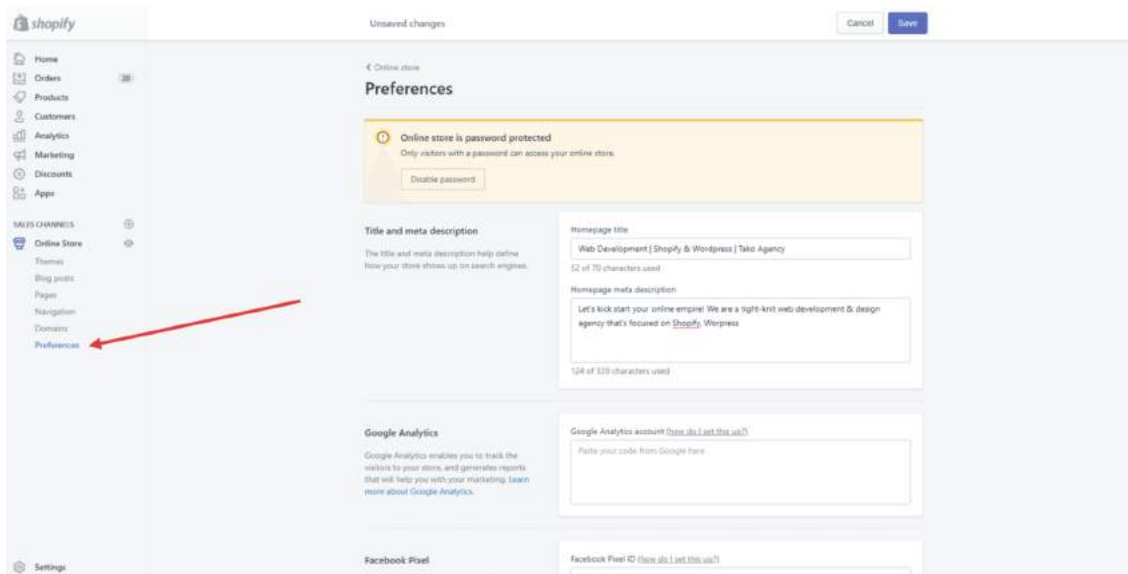
Preferences

URL /admin/online_store/preferences



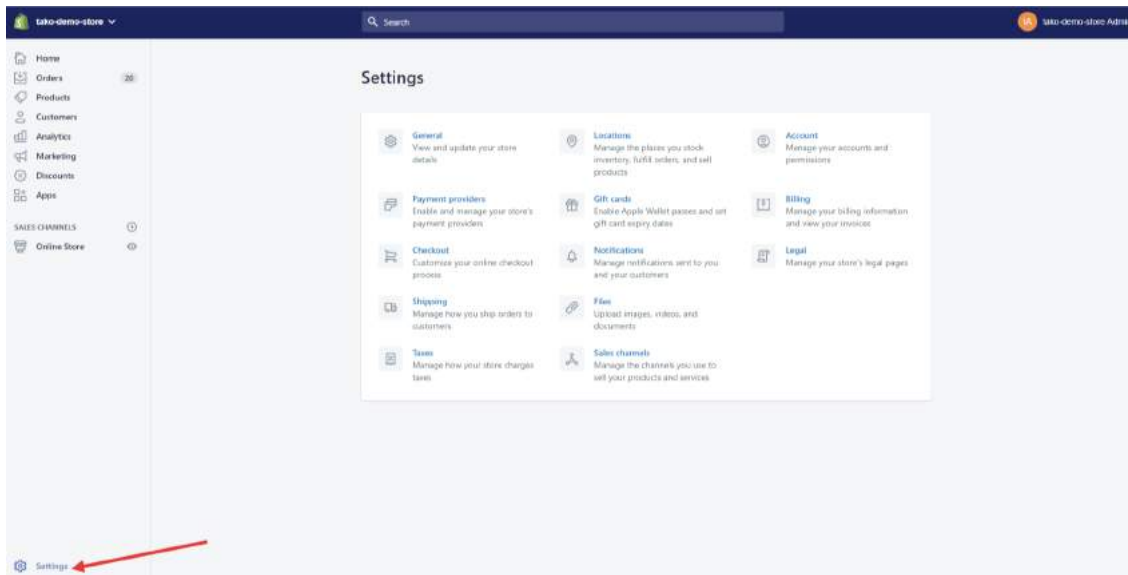
The “Preferences” section allows you to fill in some critical search engine information, including a Facebook pixel and your Google Analytics account. Just follow the prompts provided to link the appropriate accounts!

In the “Password protection” section, you have the option to restrict access to your website. By checking the “Enable password” box, only those visitors who have the password will be able to see your store.



Settings

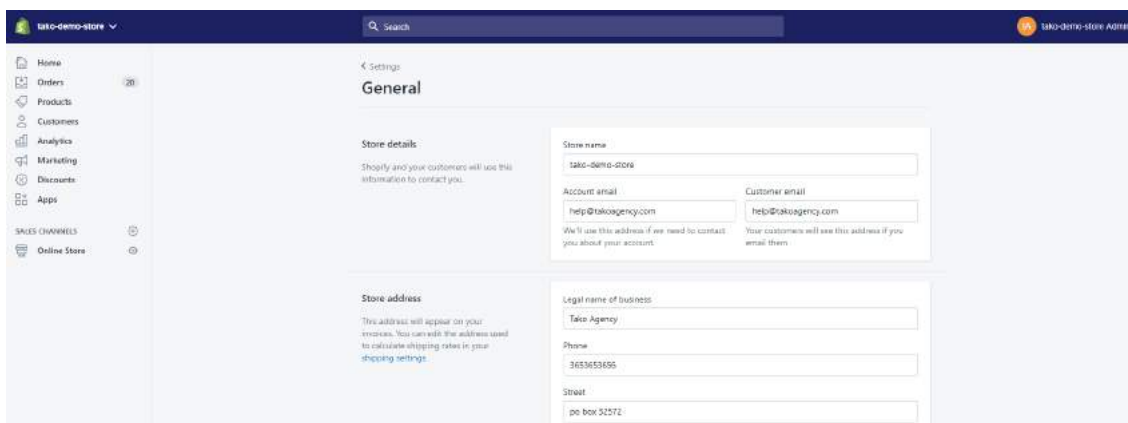
The settings section of your Shopify admin panel contains a lot of important areas to pay attention to. Let's take a look at a few of them.



General

URL </admin/settings/general> ➔

The “General” section is one of the most important pages on your site and covers essential elements like address, timezone, currency, and other details.



Taxes

URL </admin/settings/taxes> 

Here you configure the relevant taxes settings for your store.



Tako Agency Pro Tip:

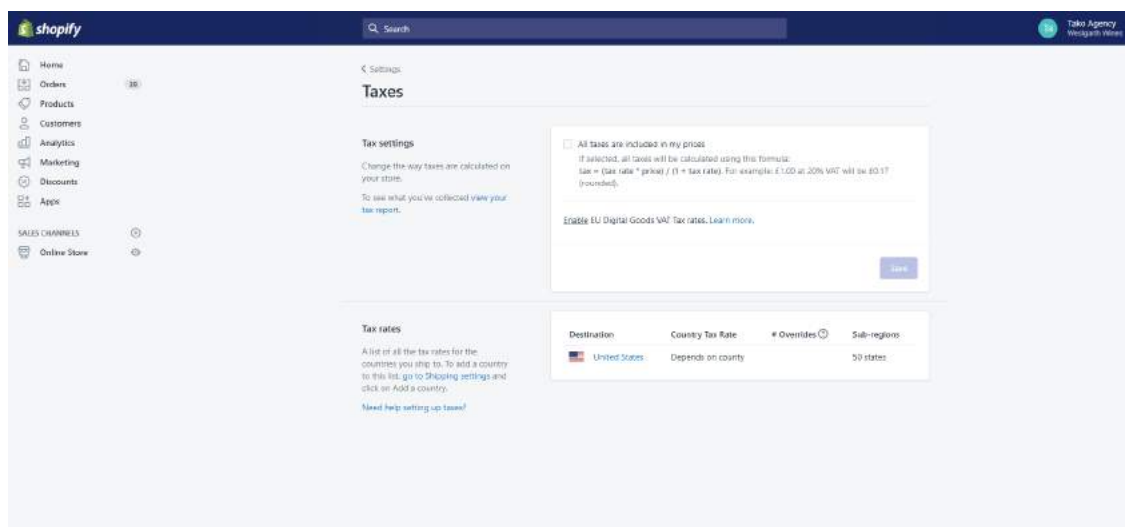
Don't let yourself become confused or intimidated by this section. If you're really concerned you can contact a CPA or other tax professional to help you make the right decision, but why not start with Shopify's own manual? Access that here:
<https://help.shopify.com/en/manual/taxes/general-steps>

As a merchant, you might need to charge taxes on your sales, and then report and remit those taxes to your government. If you sell physical goods in a particular state, you are probably required to collect sales tax from your customers.

Here are some common (but not universal) exceptions to state sales taxes:

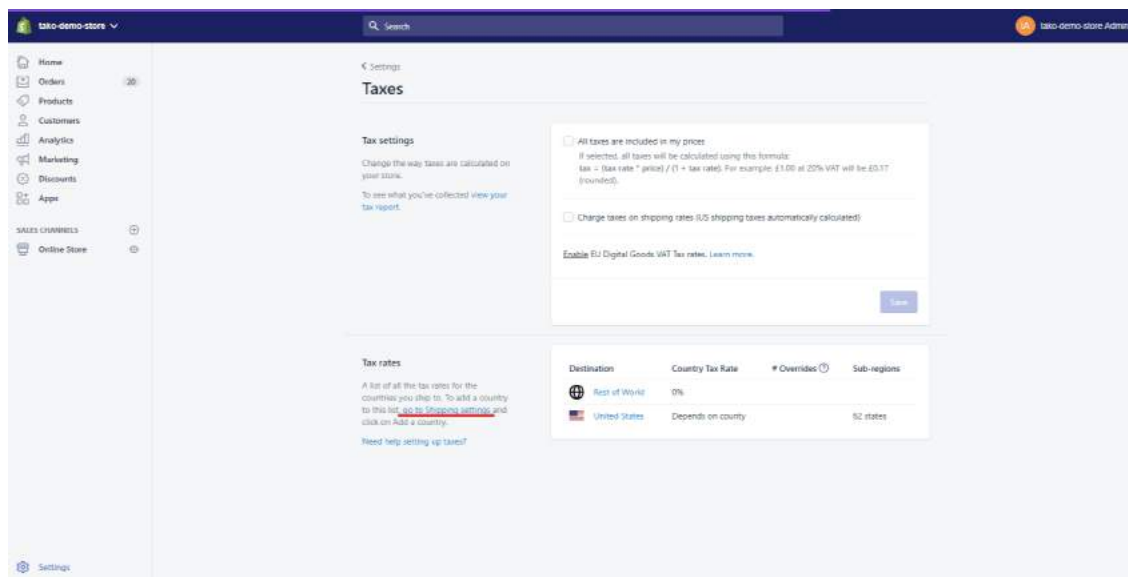
- Food, particularly from grocery stores to be prepared in the home
- Prescription drugs
- Agricultural products, like seeds and animal food
- Products for resale, raw materials, or inventory that will be resold
- Intangible property (such as computer software)

Although tax laws and regulations are complex and can change often, you can set up Shopify to automatically handle most common sales tax calculations. You can also set up tax overrides to address unique tax laws and situations.



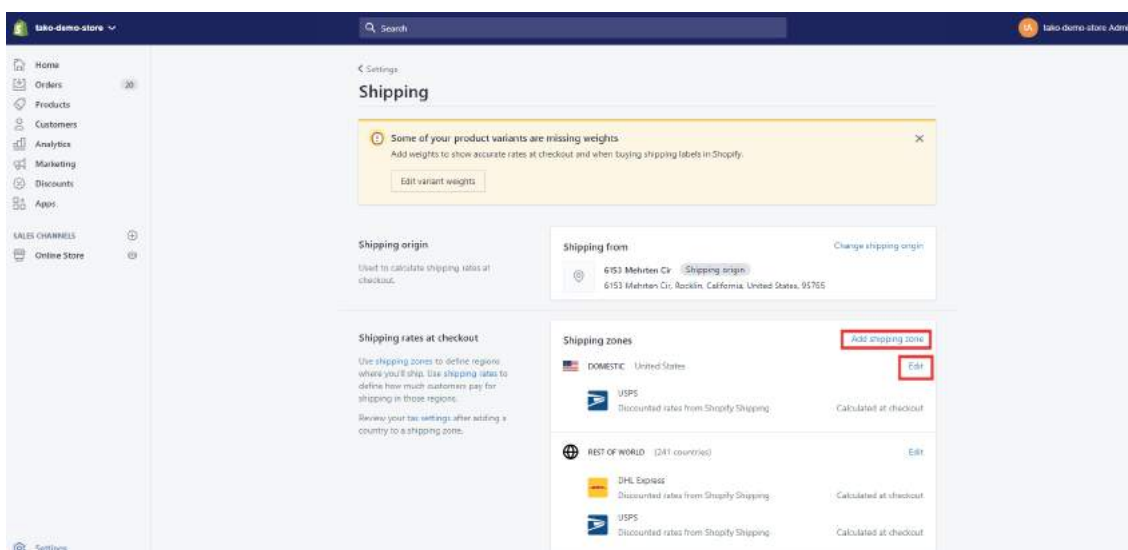
If you do charge taxes, you'll need to configure the appropriate Tax Rate:

Step 1. Before you can set up the tax rate, you must first define the country or countries (shipping zone) you'll be shipping to by clicking the blue “go to Shipping settings” link.

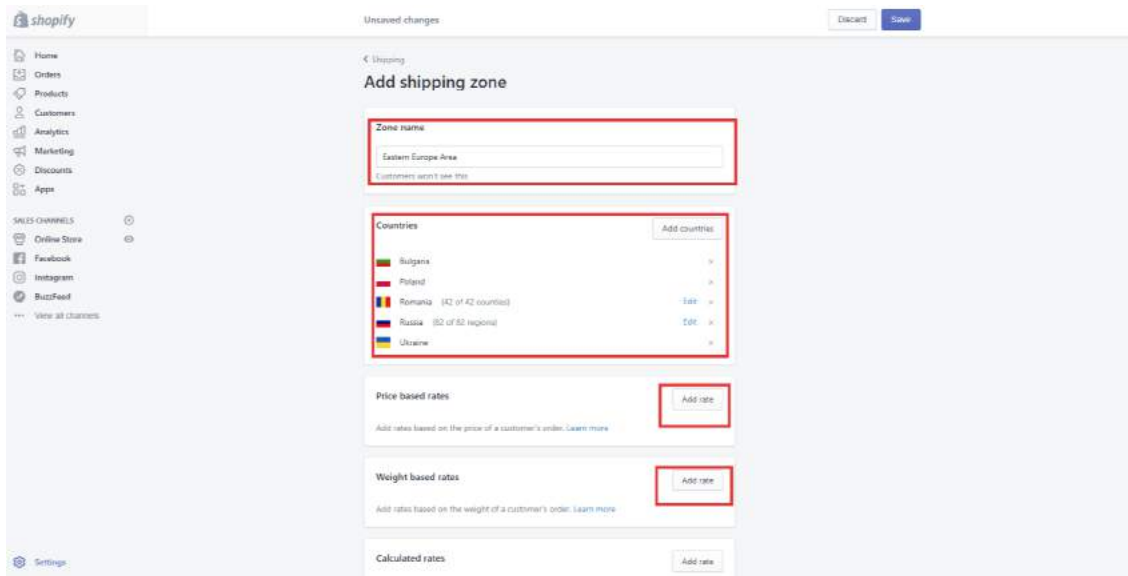


In the shipping window, click “Add shipping zone” to add a new shipping zone or “Edit” to edit already added shipping zones.

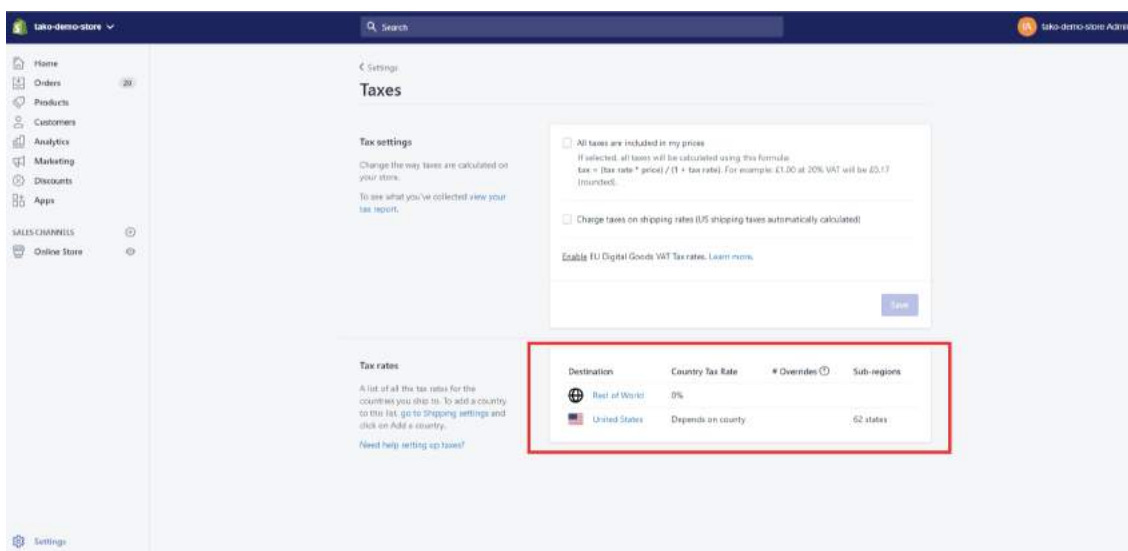
• Add/Edit Shipping zone



- Shipping zone section



The countries you added in the Shipping settings will appear as a Destination.



Step 2. Once you've defined the shipping zones, you can set up the specific tax rates for each region.

As you can see in the screenshot below, some countries have sub-regions.

Tax rates

A list of all the tax rates for the countries you ship to. To add a country to this list, go to [Shipping settings](#) and click on [Add a country](#).

[Need help setting up taxes?](#)

Destination	Country Tax Rate	# Overrides ⓘ	Sub-regions
Bulgaria	0%		
Poland	0%		
Rest of World	0%		
Romania	0%		42 counties
Russia	0%		82 regions
Ukraine	0%		
United States	Depends on county		62 states

You can choose to set the same tax rate for the whole country or different tax rates for each sub-region by clicking the country name:

Destination	Country Tax Rate	# Overrides ⓘ	Sub-regions
Bulgaria	0%		
Poland	0%		
Rest of World	0%		
Romania	0%		42 counties
Russia	0%		82 regions
Ukraine	0%		
United States	Depends on county		62 states

< Taxes

Romania

Base taxes

All applicable taxes for Romania. These taxes will be used unless overrides are specified below.

[Reset to default tax rates](#)

COUNTRY TAX

0.004

REGIONS

Alba Tax added to 0.004% federal tax

Arad Tax added to 0.004% federal tax

Arges Tax added to 0.004% federal tax

Bacau Tax added to 0.004% federal tax

Bihor Tax added to 0.004% federal tax

Bistrita-Nasaud Tax added to 0.004% federal tax

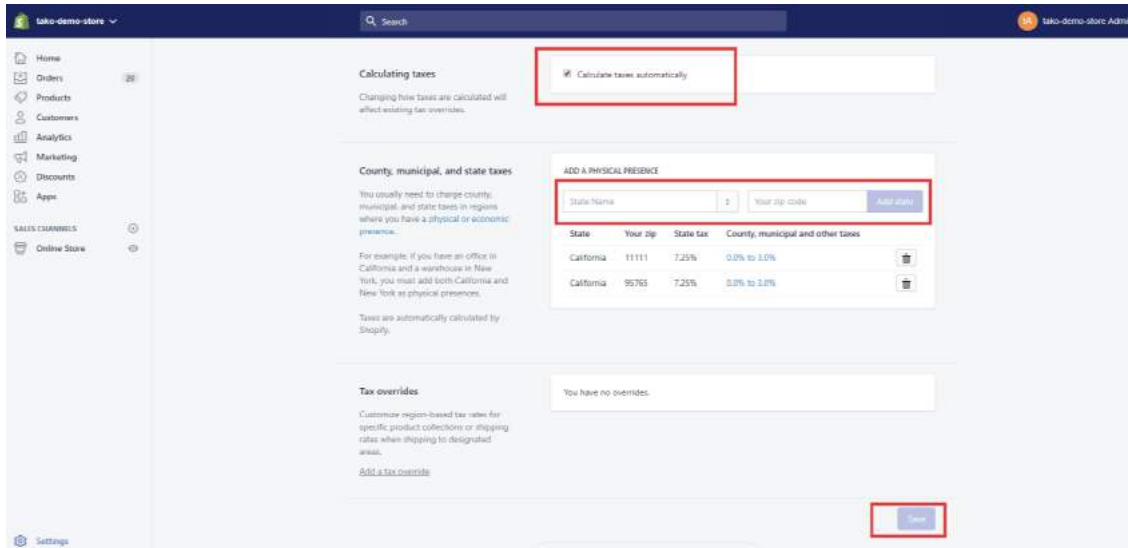
Botosani Tax added to 0.004% federal tax

Braila Tax added to 0.004% federal tax

For the United States, if you want to use Shopify's automatic tax settings, then you can check the "calculate taxes automatically" box.

Step 3. If you sell digital products, then set up the taxes that apply to those items.

When all are done, click the “Save” button.

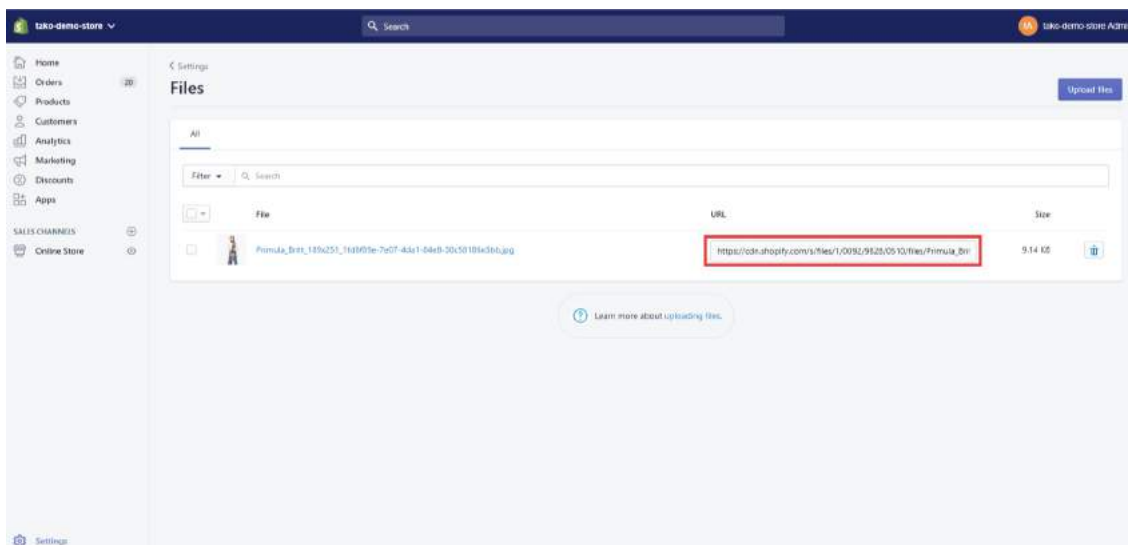


Files

URL </admin/settings/files>

This one's pretty self-explanatory. Here you can manage any and all files you've uploaded as part of your site: images, fonts, zip files, and so on.

When you upload a file, it will be listed here and generate a Shopify CDN link.

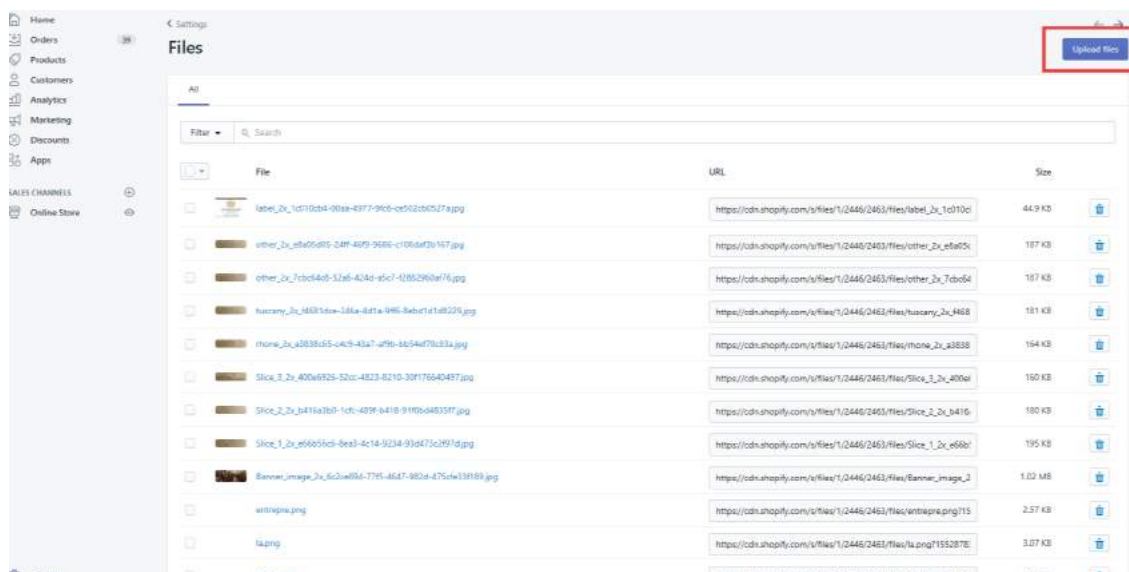


You might upload files to:

- Add an image to a webpage, blog post, product page, or collection page.
- Add an image or logo to customize your theme.
- Make a file available for customers to download

After the file is uploaded in this section, Shopify will generate a CDN link that'll allow you to directly visit that file using that link.

To upload a file, click the purple “Upload Files” button at the top right corner.



Tako Agency Pro Tip:

The Shopify file system is extremely helpful to merchants that want to make quick changes. Shopify stores your images, icons, etc right inside your store so that they are easily accessible for you to use across your site.

Payment Providers

URL </admin/settings/payments> 

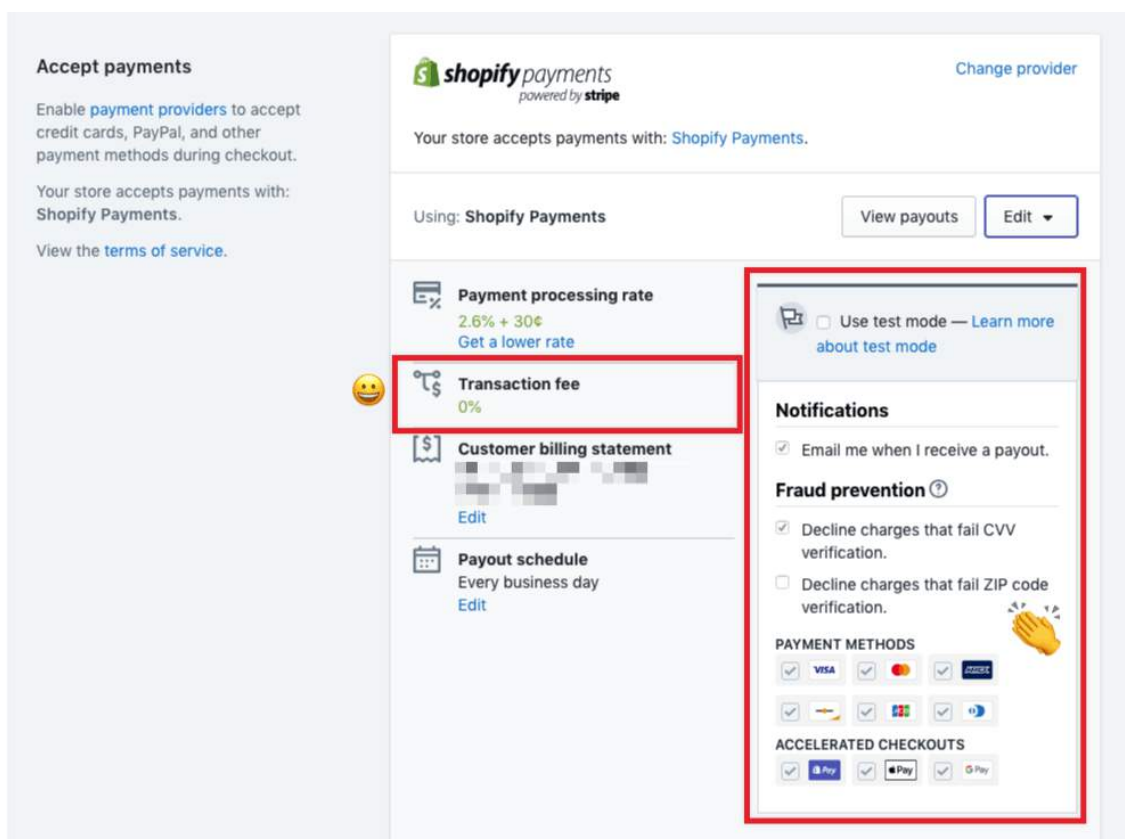
It's time to GET THAT CASH! In this section, you can manage and enable payment providers for your store.

How to add a payment provider:

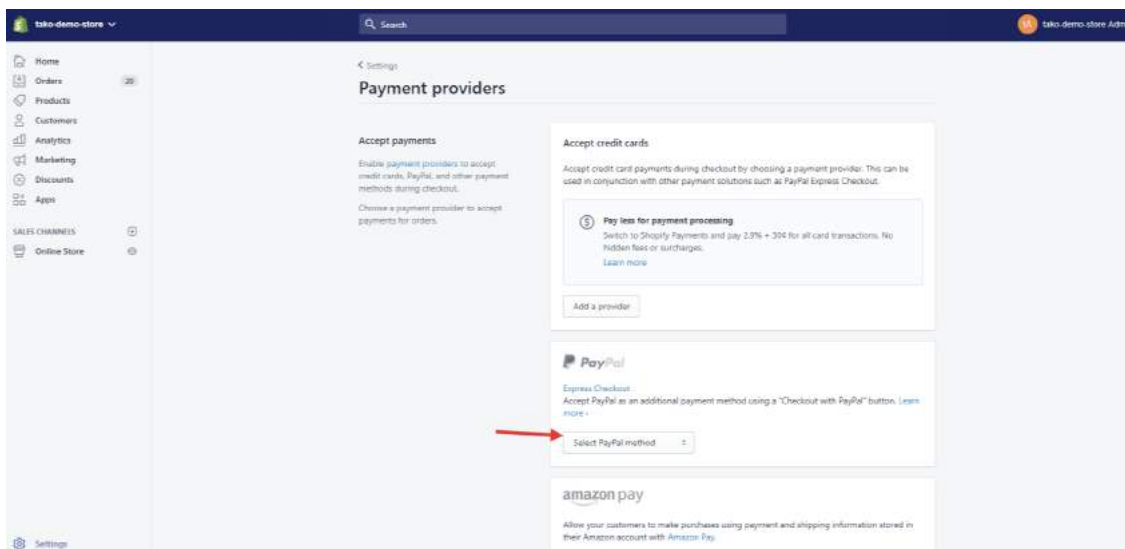
Step 1. Figure out how you prefer to collect payments and from which provider.

We recommend Shopify Payments because you can accept payments immediately AND avoid transaction fees (though there is still a payment processing fee, which is different). If you choose to use another provider, you will incur an additional transaction fee from Shopify.

You will also notice that Shopify Payments automatically allows you to accept all credit cards and even Shopify Pay, Apple Pay, and Google Pay. Keep this capability in mind when choosing your payment provider, as most others don't offer this option.



Step 2. Connect your business PayPal account. If you don't have one, get one! Many customers love paying with PayPal because of its robust purchase protections.



Step 3. If you would like to use additional payment methods, you will see those options as you scroll down on the Payment Providers page.

Pay particular attention to the payment authorization settings at the bottom of the Payment Providers page. If you're using Shopify Payments or another credit card payment provider, you'll need to decide how to capture payment from your customers: automatically, or manually.

Automatically capture payment for orders

Most merchants set their stores to capture credit card payments automatically. This allows the store to automatically charge customers' cards before the authorization period for that order ends, which saves time when processing orders.

Manually capture payment for orders

If you set up manual capture, then you'll need to capture the funds for each order from the Orders page of Shopify. If you use this option, you have to capture the payment for each order before the authorization period for that order ends. You won't receive money from orders automatically. This option is most frequently used by merchants whose orders must be sent out by the warehouse first before the card is charged.

Payment authorization
Learn more about [authorizing and capturing payments](#).

☐ Automatically capture payment for orders
The customer's payment method is authorized and charged automatically.

☒ **Manually capture payment for orders**
The customer's payment method is authorized at the time of their order. You'll need to capture payment before the authorization period ends.

[Save](#)



Locations

URL </admin/settings/locations>

A location is a physical place or an app where you do any or all of the following activities: sell products, ship or fulfill orders, and stock inventory. For example, if your store is a dropshipping site that uses Oberlo, then Oberlo will be a location.

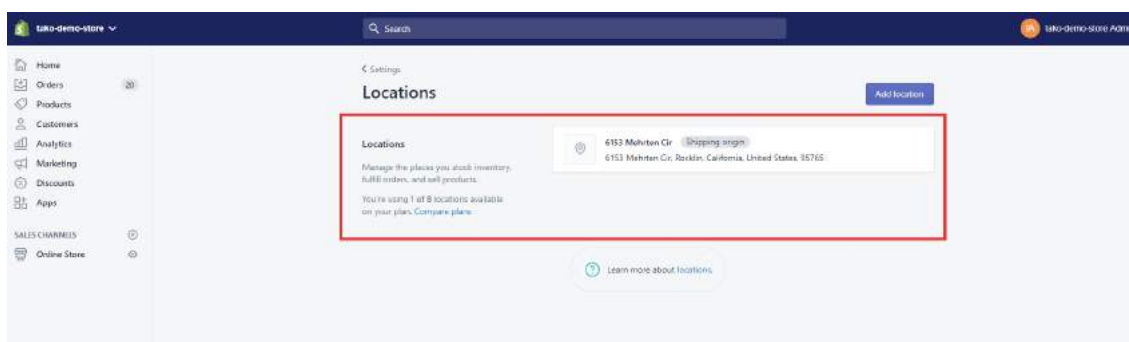
You have the option to set up multiple locations so that you can track inventory and fulfill orders at all your locations, but the limit on the number of locations you can have depends on the Pricing Plan of your store account.

See here for the limit:

The maximum number of locations that you can have depends on your plan:

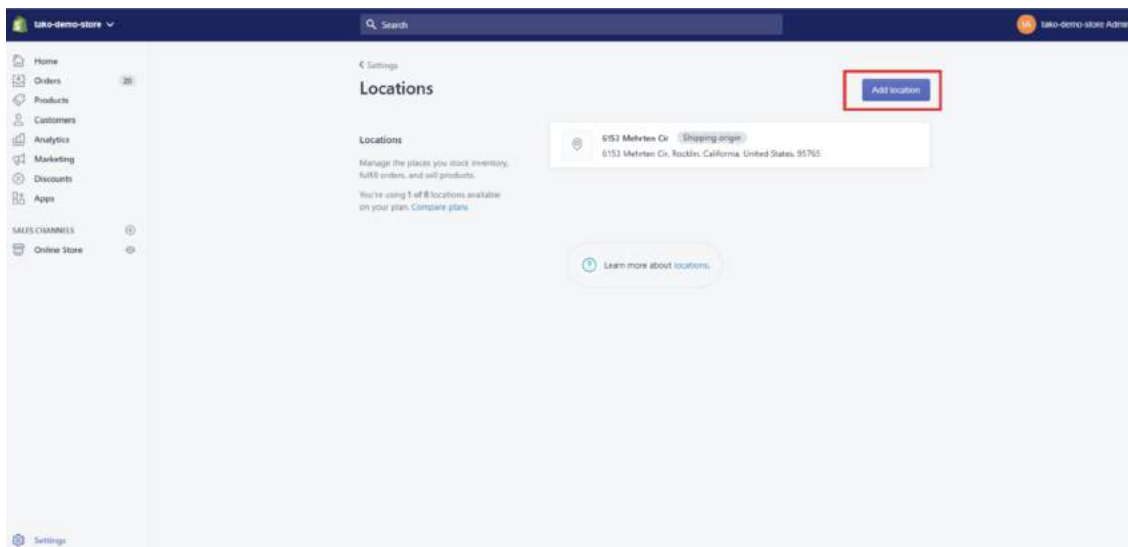
- Shopify Lite - 3
- Basic Shopify - 4
- Shopify - 5
- Advanced Shopify - 8
- Shopify Plus - 20 (Contact Plus Support if you need more than 20 locations.)

See here for the page:

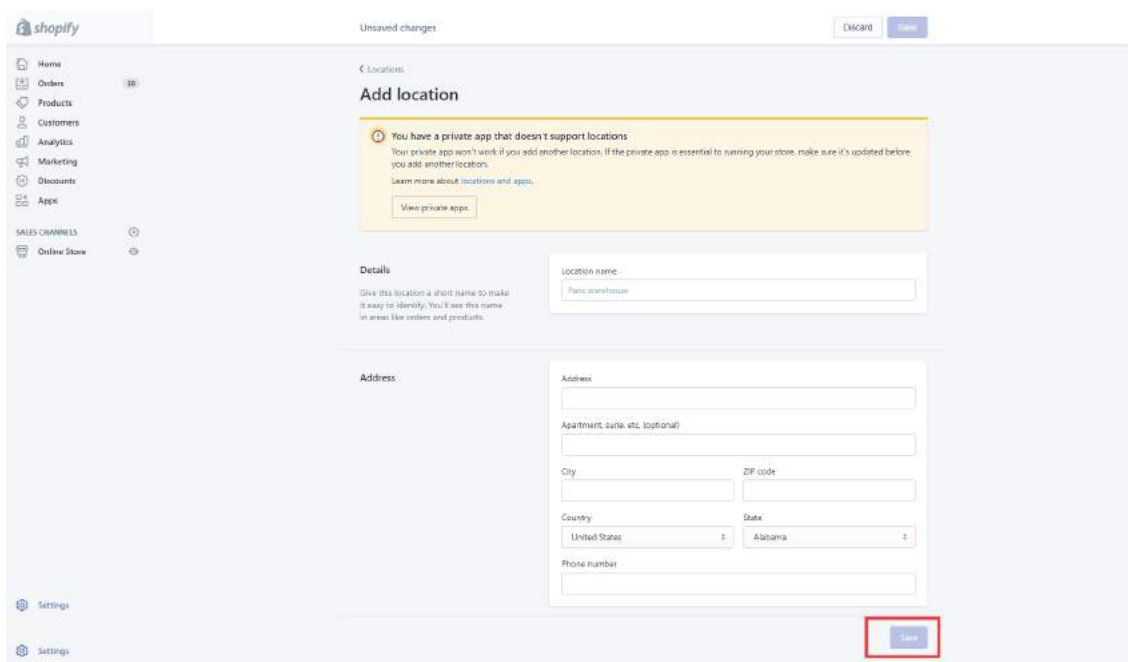


To add a location:

Step 1. Click “Add location” button at the top right corner.



Step 2. Fill the form and click “Save” button.

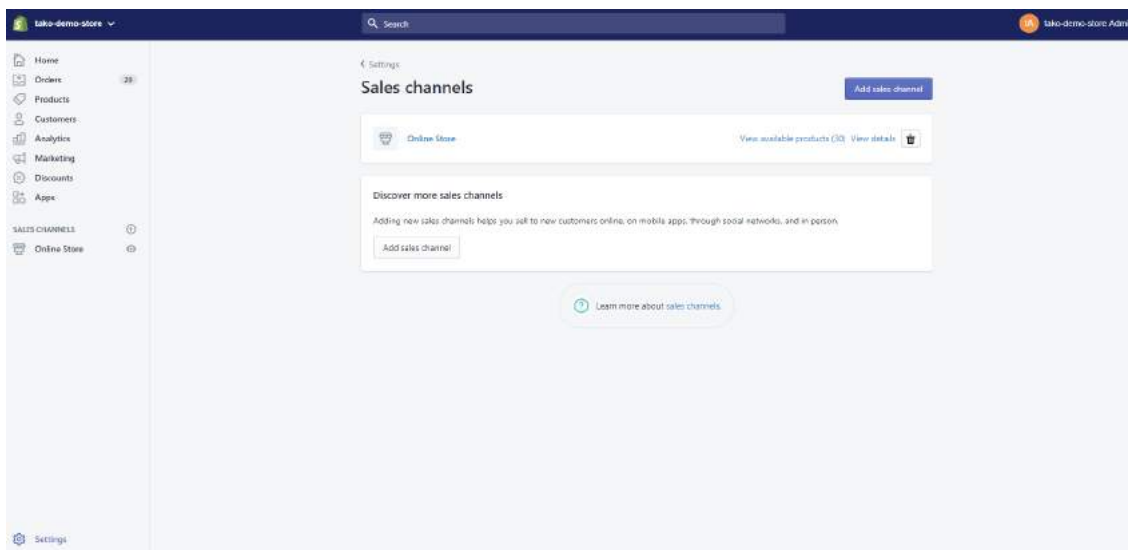


Sales Channels

URL </admin/settings/channels> 

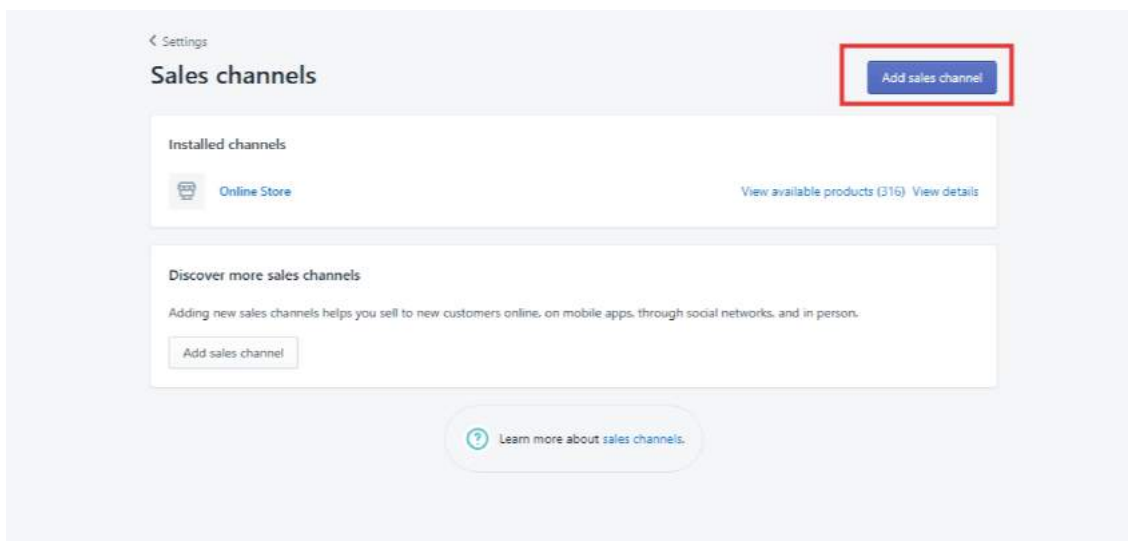
Shopify is a wonderfully versatile e-commerce platform because it's got built-in capability for other online sales channels like Amazon, Facebook, Instagram, and more. Now you can sell more in more places!

When you add a sales channel, it will be listed here on the Sales Channels Page.

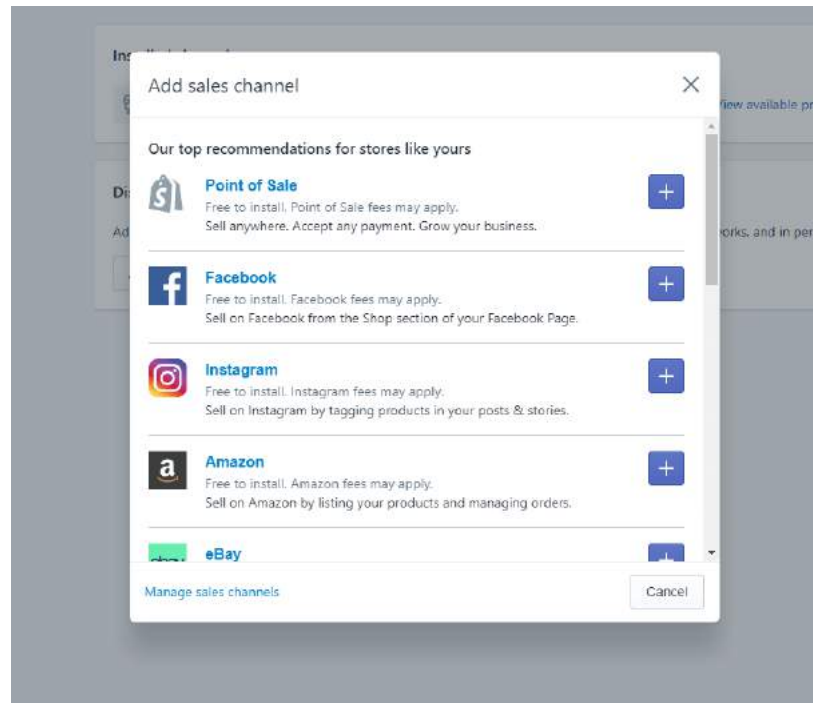


To add an online sales channel to your store:

Step 1. Click the purple “Add sales channel” button at the top right corner.



Step 2. Choose the sales channels you'd like to add by clicking the purple "+" icon on the opened dialog. Then you can see the details of configuration for each of the sales channels.

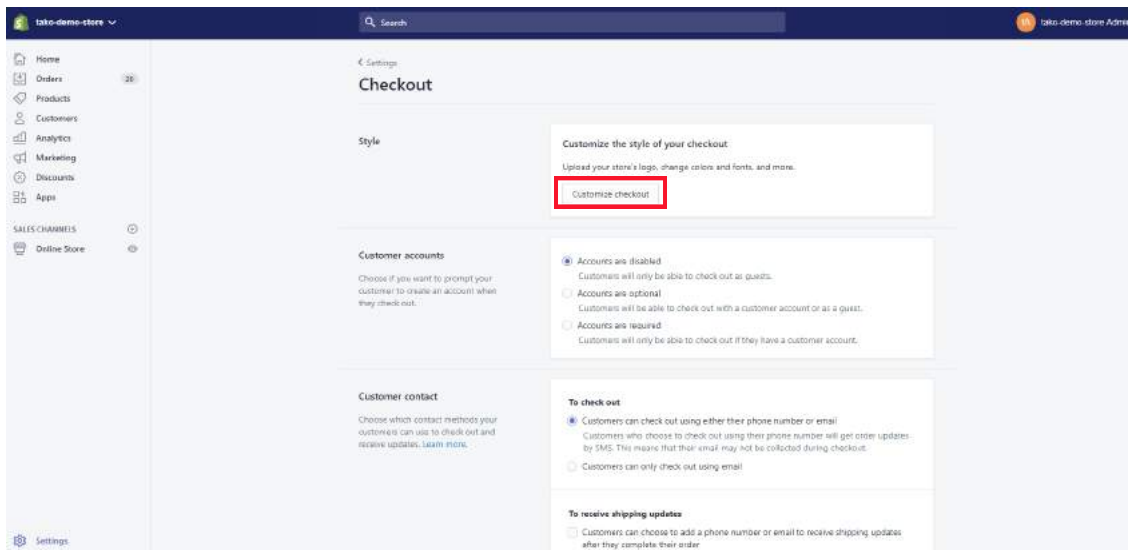


Checkout

URL </admin/settings/checkout> 

The “Checkout” section of your settings covers the technical aspects of your checkout page, such as customer accounts and methods of contact, form fields, order processing specifics, abandoned cart mechanics, and more.

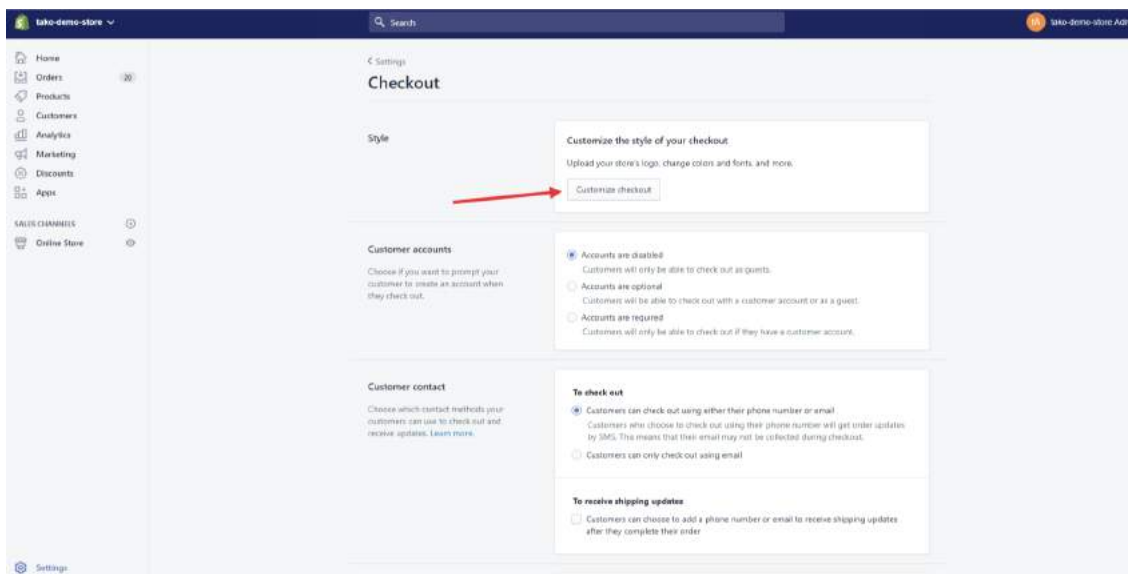
To customize the appearance of the checkout page, you can click “Customize checkout” button and be redirected to the Shopify Customizer.



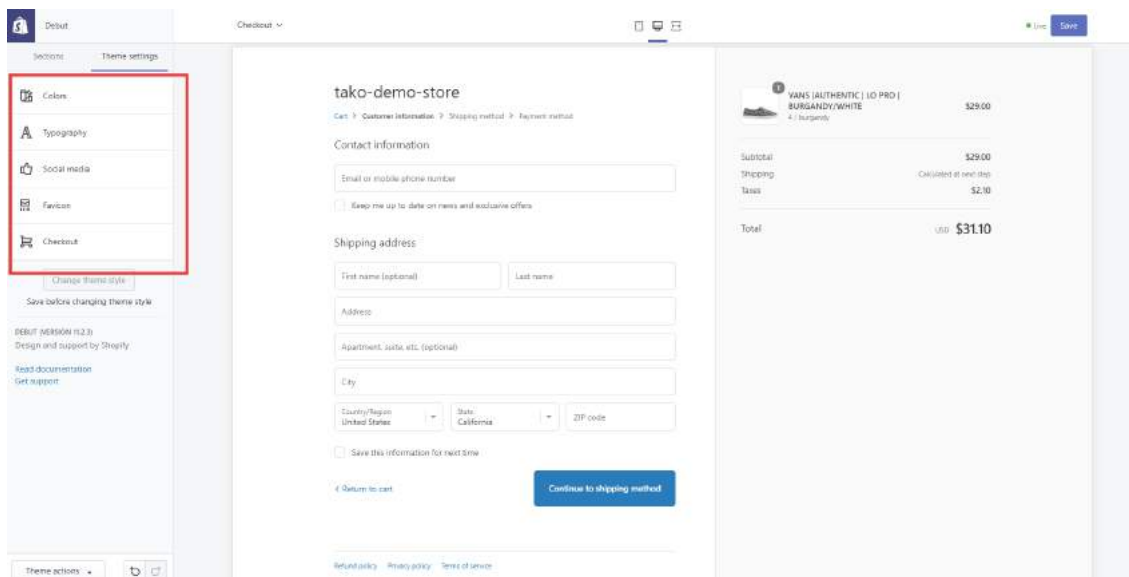
Customizing the style of your checkout

If you sell your products using an online store, you can customize the style of your checkout pages in the theme editor. Add your company logo, change the colors, or choose a new font to make the checkout match your branding.

Click customize checkout button.

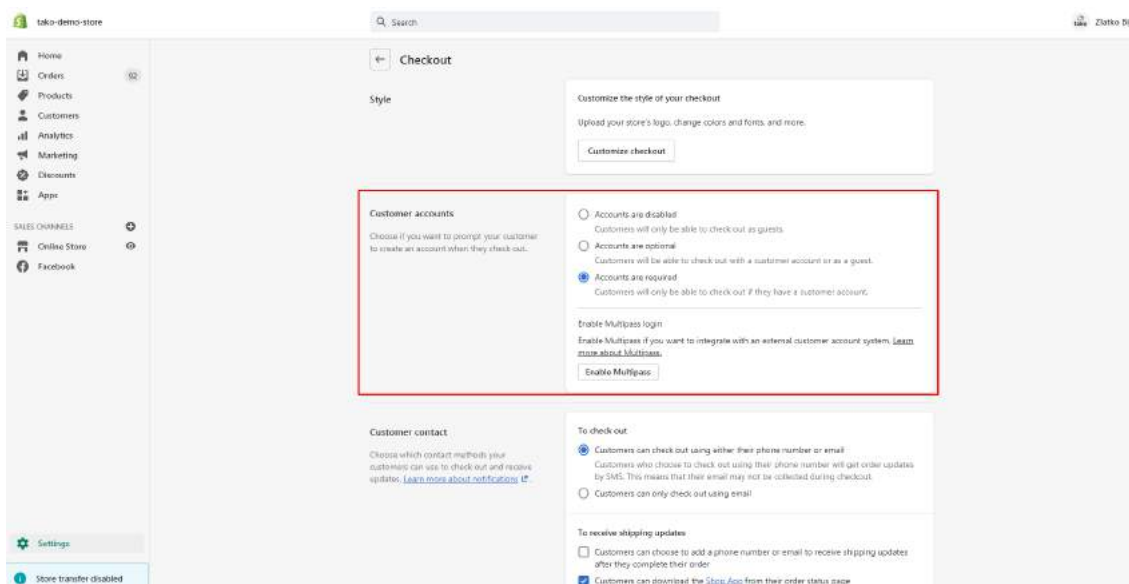


You'll be directed to this page. Just click the "Theme settings" tab in the top left, and review each of these sections to customize your checkout page.



Enabling or Disabling customer accounts

Here you can decide if you want to give your customers the option to create an account with you for faster checkout in the future, or simply checkout as a guest. If you enable customer accounts, Shopify stores password-protected information about a customer's identity, order history, and current order status. Your customer's details, such as address information, will be pre-filled during checkout on future orders.



Accounts are disabled: Customers won't see the option to create an account or log in during checkout. They'll have to manually enter all their details at checkout each time.

Accounts are optional: Customers can choose to create an account, but it's not mandatory to check out. If customers have an account and they're logged in, then their address fields are pre-filled when they place an order.

Accounts are required: Customers will need to create an account, or have an account and be logged in to complete the checkout. This setting is useful if you're running a wholesale or members-only store, for example. Address fields are pre-filled when the customer places an order.

Customer Contact

Customers will only be able to check out if they have a customer account.

Enable Multipass login
Enable Multipass if you want to integrate with an external customer account system. [Learn more about Multipass](#)
[Enable Multipass](#)

Customer contact
Choose which contact methods your customers can use to check out and receive updates. [Learn more about configurations](#)

To check out
☒ Customers can check out using either their phone number or email
Customers who choose to check out using their phone number will get order updates by SMS. This means that their email may not be collected during checkout.
☐ Customers can only check out using email

To receive shipping updates
☐ Customers can choose to add a phone number or email to receive shipping updates after they complete their order
☒ Customers can download the [Store App](#) from their order status page

Form options
Choose whether your checkout form requires extra information from your customer.

Full name
☒ Require last name only
☐ Require first and last name

Company name
☒ Hidden
☐ Optional
☐ Required

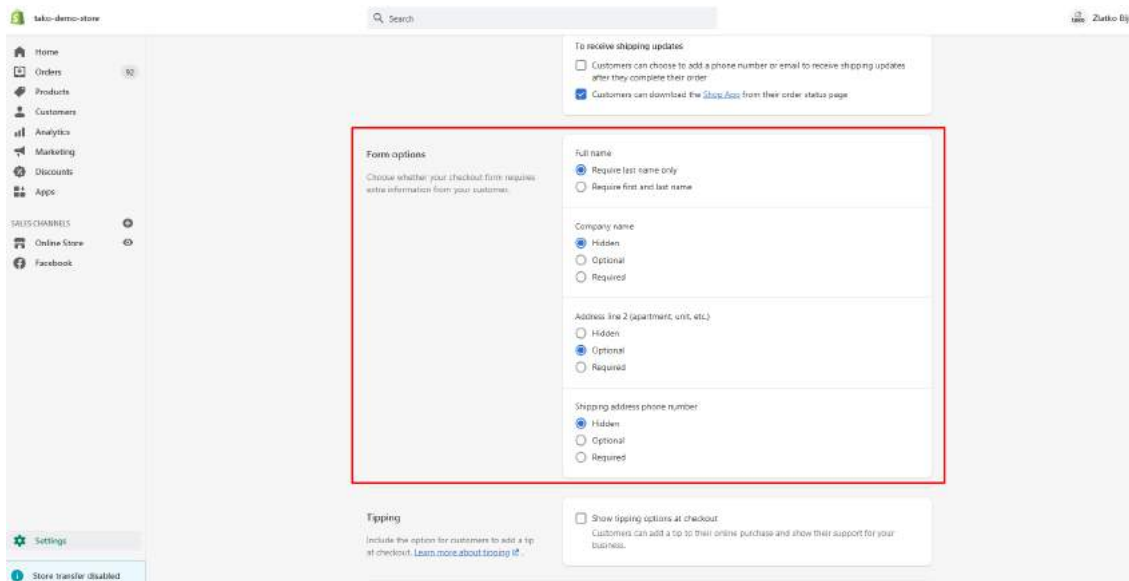
Address line 2 (apartment, unit, etc.)
☐ Hidden

This one's easy! Shopify explains your options clearly.

Editing the checkout form options

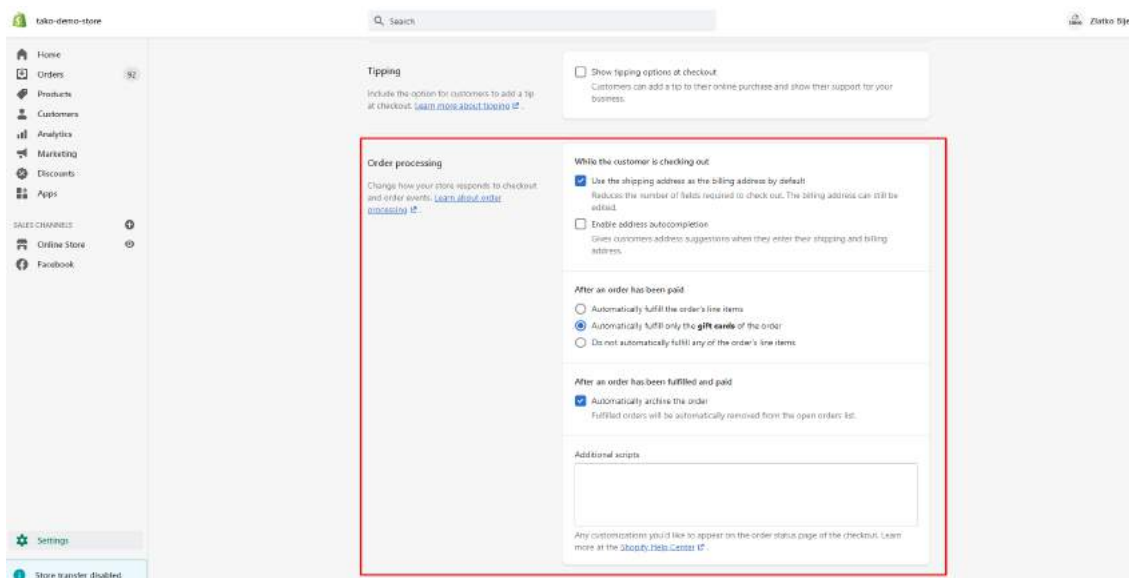
Here you can decide what kinds of information you want to collect from your customers during checkout. You can edit some of the fields to be required, optional, or hidden. "Hidden" means the customer won't even see it on the form.

For example, some customers don't like to provide their phone number during an online checkout, so they might abandon their cart if you make it a required field. However, in some cases your payment provider or shipping carrier might require a customer to provide a phone number to complete the checkout.

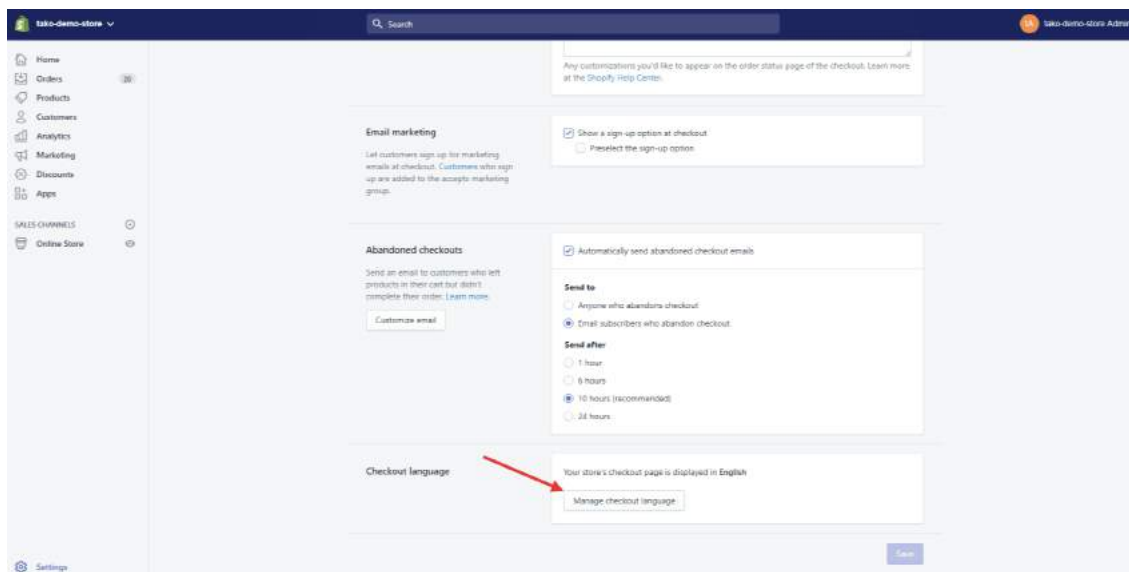


Setup order processing and archiving

You can choose automatic or manual fulfillment for orders and order archiving here. When you fulfill an order in Shopify, you begin the process of sending the order on its way to the customer.



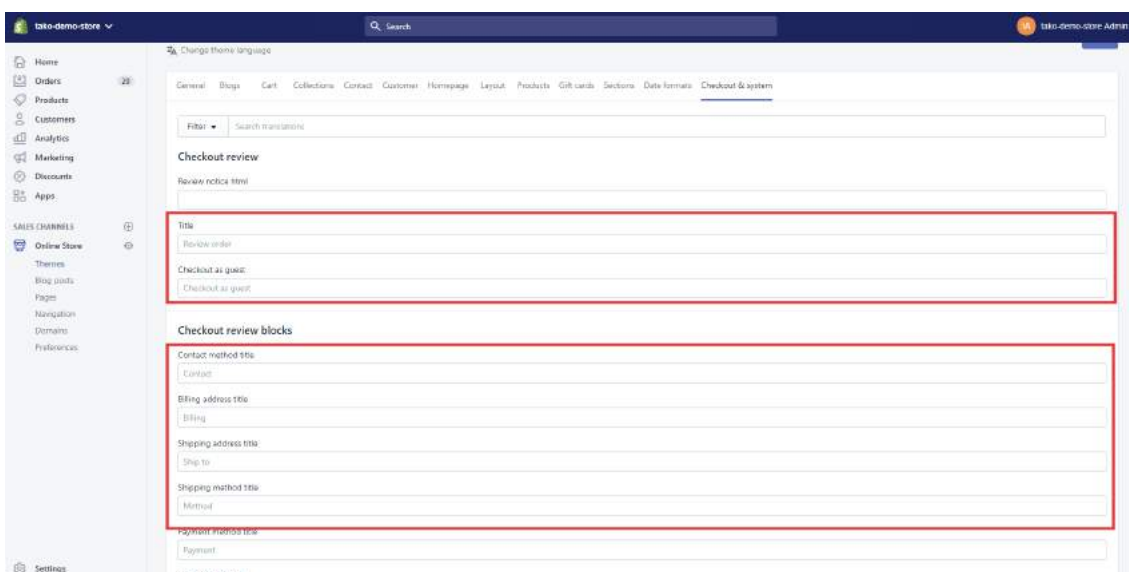
Checkout Language: You can translate your checkout page to a different language.



You can change the checkout language by clicking the “Change theme language” link in the upper left corner. It'll open a modal window for choosing your language.



And you can set your custom names to the titles and labels of checkout page.



Tako Agency Pro Tip:

If you're on a regular Shopify plan, you only have a few options in terms of customization, although it's pretty simple to change the background color of your checkout screen or add an image. The challenge is to utilize that space correctly.

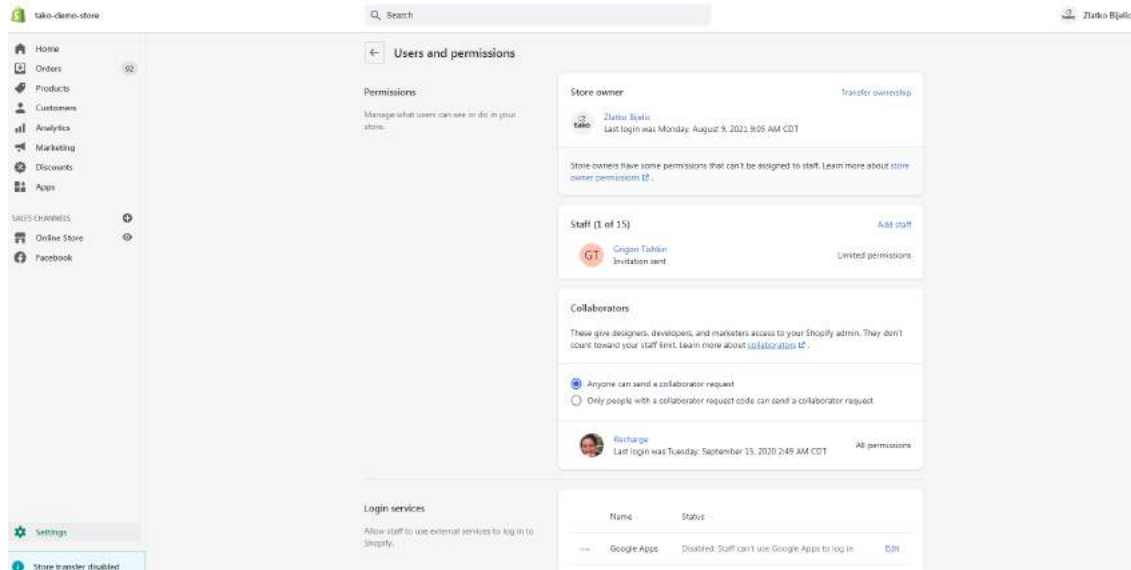
Shopify Plus is a great solution that enables customization of the entire checkout process from beginning to end.

If you need help, don't hesitate to contact us. Remember you get 10% OFF if you mention this guide to us when you reach out!



Users and Permissions

URL </admin/settings/account> 



Shopify has two different types of accounts, each with varying permission options: an Owner Account & Staff Accounts. (There's a third type called Collaborator accounts that give access to various areas of your store to other professionals with whom you might be working. Click the blue "collaborator accounts" link to learn more about these types of accounts from Shopify.)

The account owner is the person whose email and contact information were originally used to sign up for Shopify.

- There is only one owner account permitted, and it has the authority to manage plans, the store name, email, staff accounts, and other relevant information.
- The number of staff accounts permitted ranges from one to unlimited depending on the store's pricing plan. See [here](#) for details:

The number of staff accounts available is determined by your Shopify [pricing plan](#):

- The **Shopify Lite** plan includes 1 staff account.
- The **Basic Shopify** plan includes 2 staff accounts.
- The **Shopify** plan includes 5 staff accounts.
- The **Advanced Shopify** plan includes 15 staff accounts.
- The **Shopify Plus** plan includes unlimited staff accounts.

Only account owners can:

- Change pricing plans.
- Manage account details like store name, credit card, and account email.
- Create and manage staff accounts.
- Choose a new account owner by transferring account ownership.
- Manage payment options.
- Change billing information.
- View Shopify bills.
- Add or change third party integrations.
- Enable or disable two-step authentication for staff account logins.
- Access Shopify Capital settings.
- List a store on the Shopify Exchange marketplace.

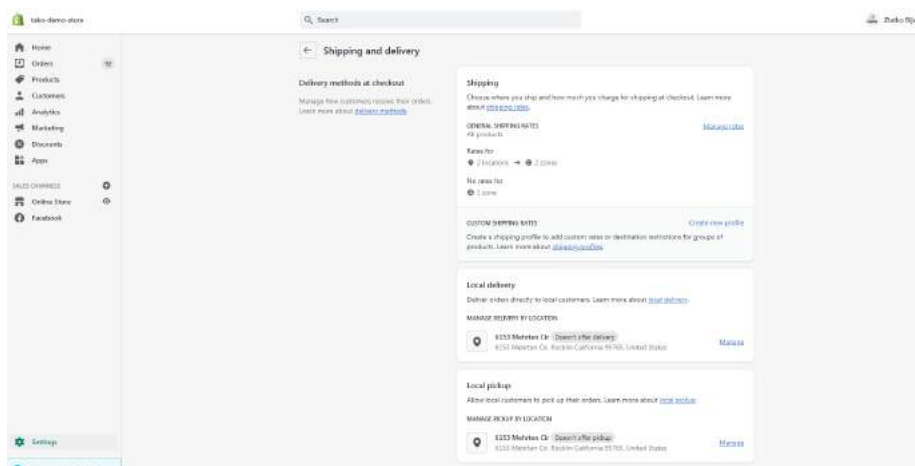
Shipping & Delivery

URL </admin/settings/shipping>

Here you can manage all your store's shipping settings including shipping rates and options, shipping labels, packing slips, and more.

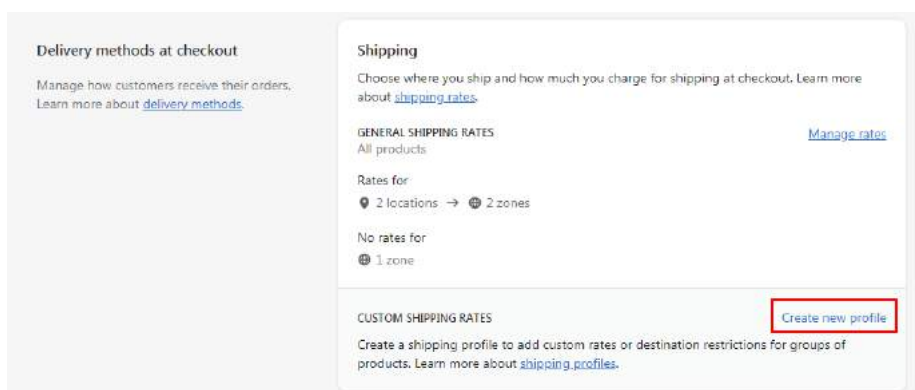
To make calculating shipping costs easier, you can define regions called “shipping zones” where you plan to ship your products. All your customers in a particular zone will pay the same shipping price, which may or may not be the same as other zones.

If your business sells physical goods, then there are different methods to get your products to your customers. The three main methods are shipping (one-time and recurring), local delivery, and local pickup. Your business can use any of these methods to deliver your products.



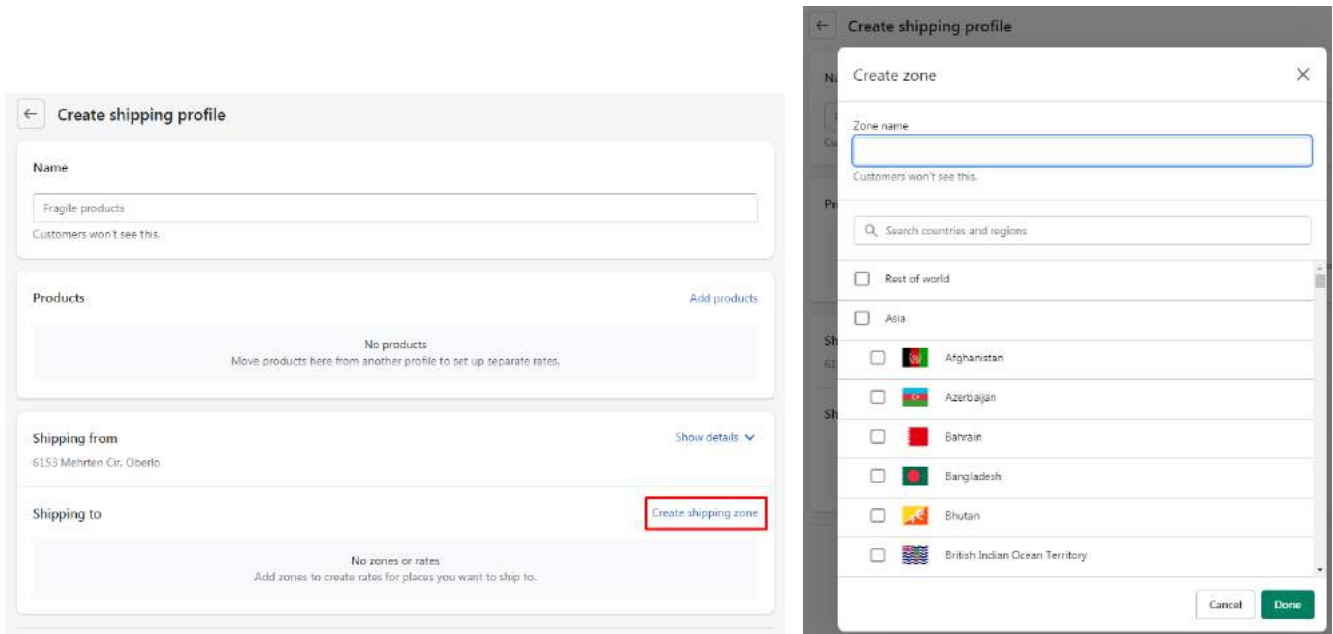
To configure shipping rates:

Step 1. Click the blue “Create new profile” link in the Custom Shipping Rates section.

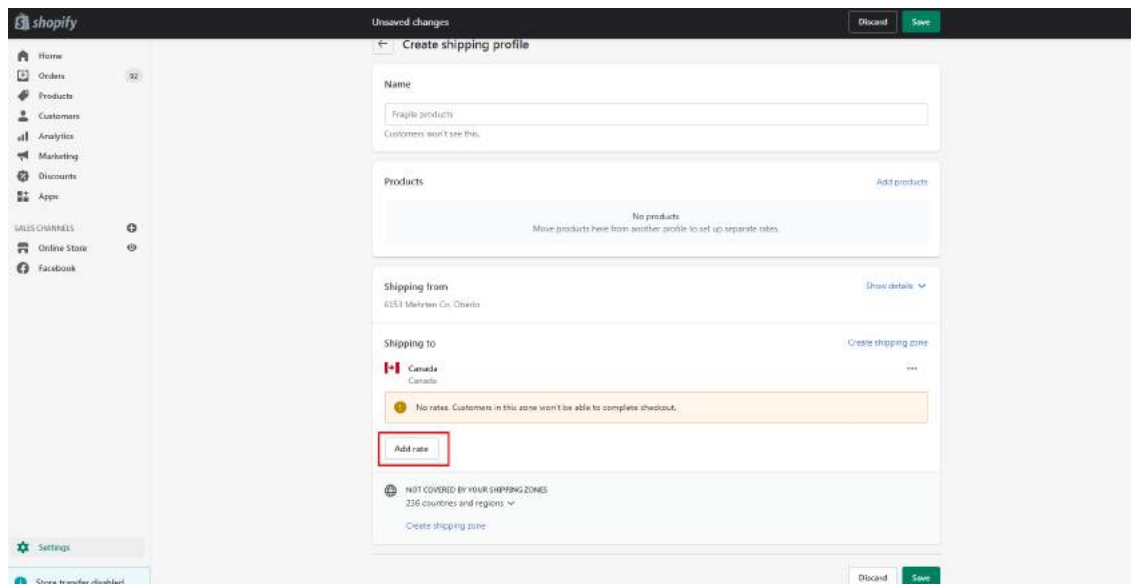


Step 2. In your new shipping profile, click the “Create shipping zone” link, add a zone name, and choose your countries for the new profile.

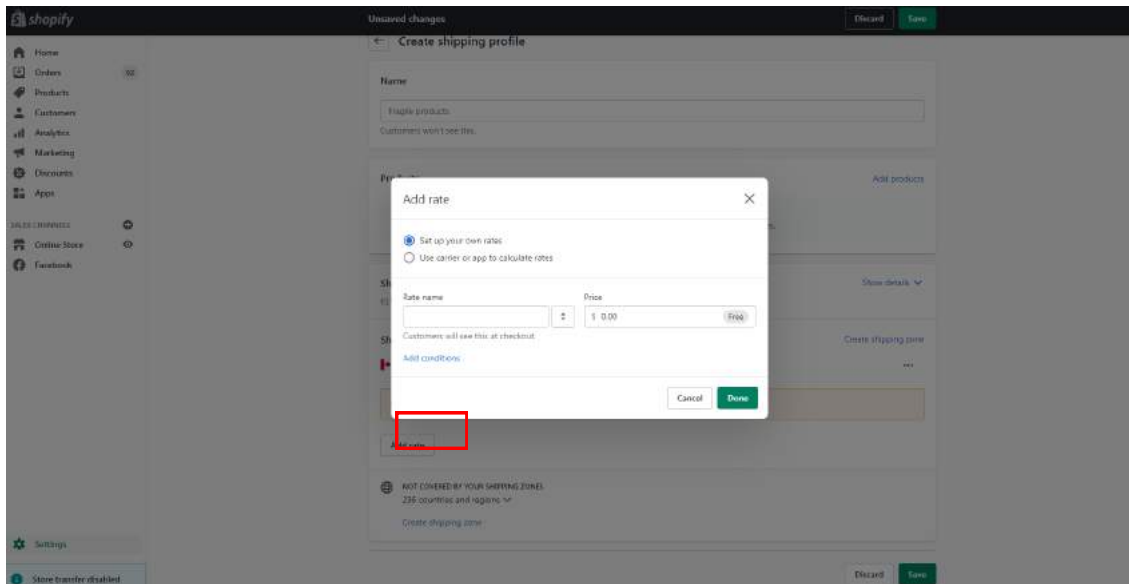
When you add a country that has states such as the United States or Brazil, you can specify exact states by clicking the blue “Edit” link.



Step 3. Input the shipping rate by clicking the “Add rate” button.



When you click the “Add rate” button, you’ll get the following pop-up that will allow you to create the rate and specify rate conditions.

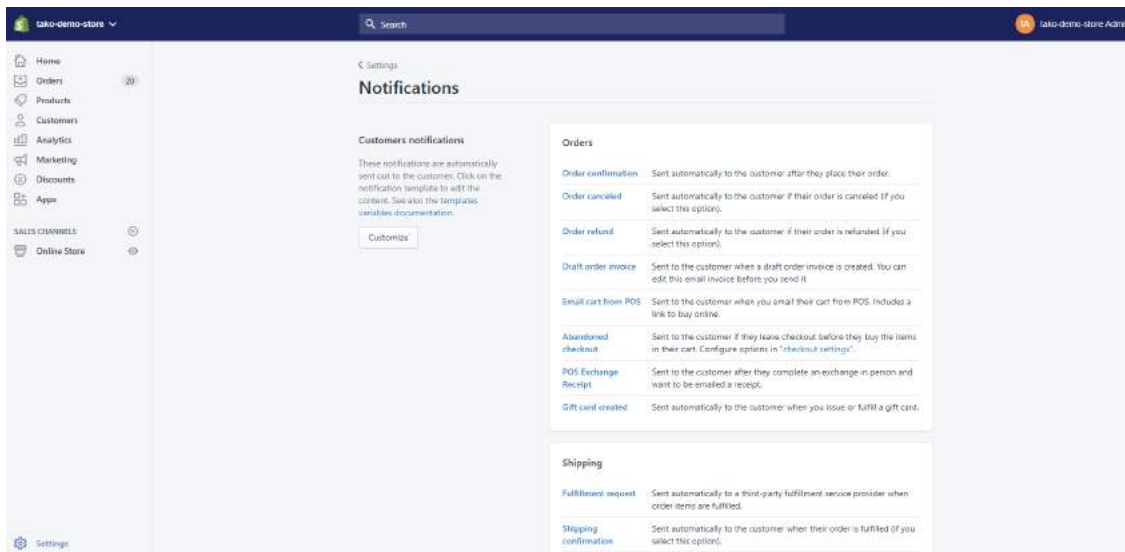


Notifications

URL </admin/settings/notifications> 

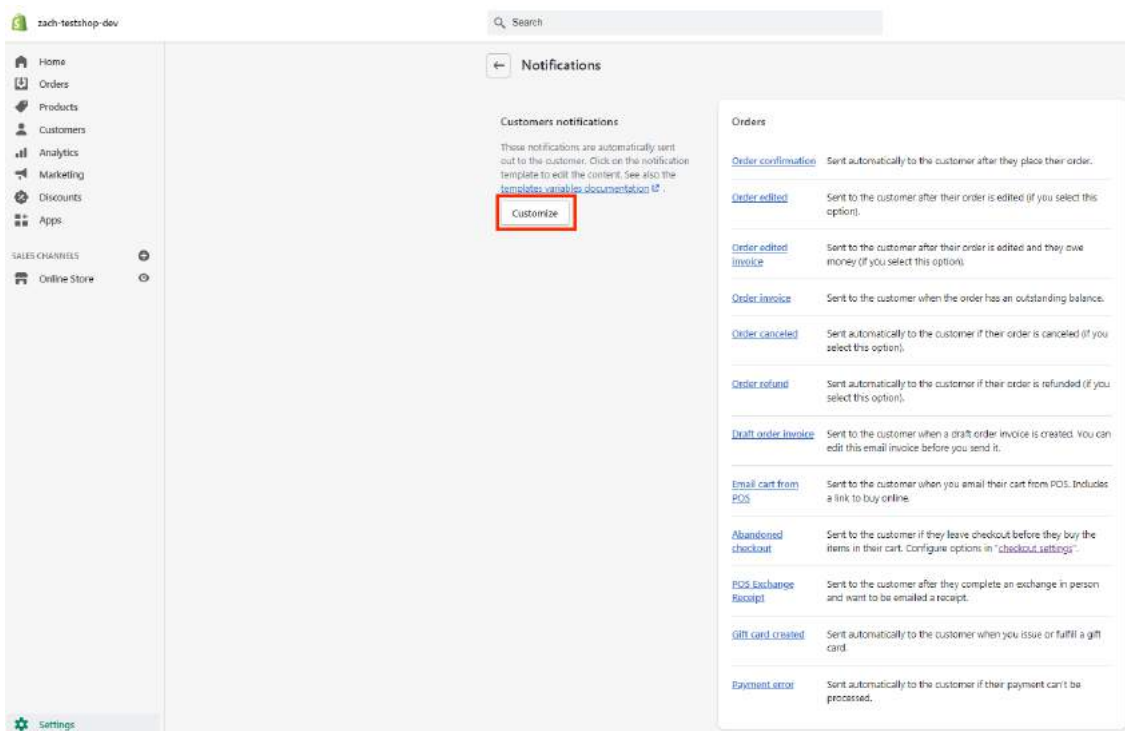
Shopify makes it easy to maintain a consistent brand identity across the entire website. The “Notifications” panel covers all of your communications with your customers as well as suppliers and staff. Even though there are some limitations, there’s quite a lot you can customize.

There are plenty of email templates already set up for you to use; they just need a bit of tweaking.

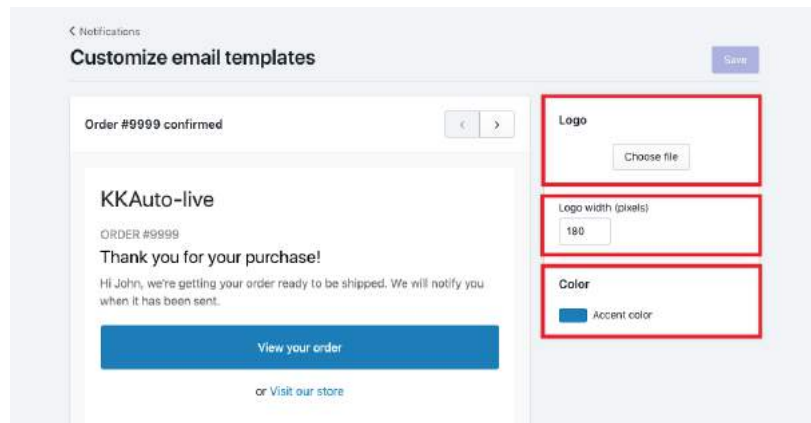


To customize the logo and colors featured in your emails:

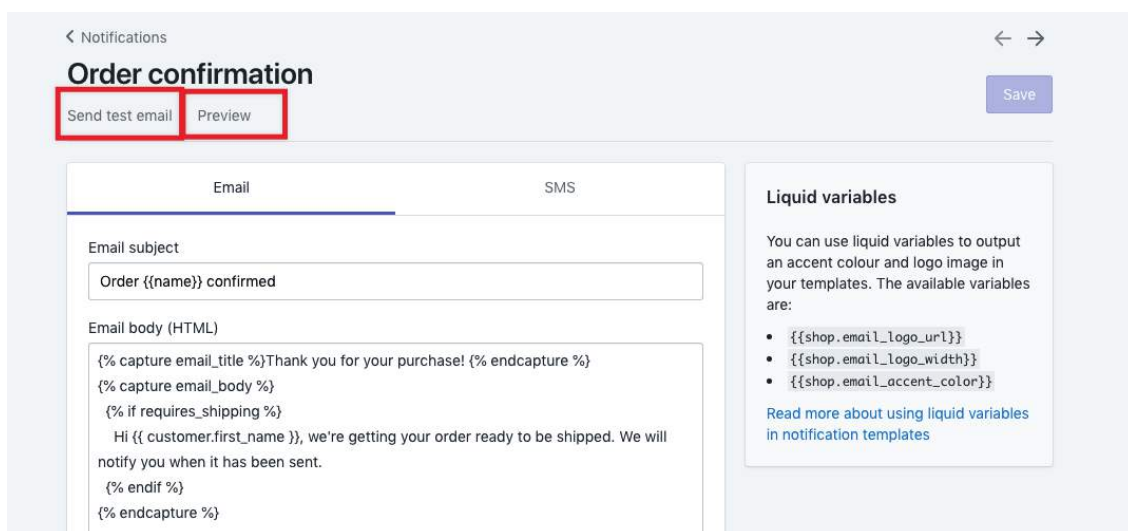
Step 1. Click on “Customize” on the left-hand side.



Step 2. Customize the logo (we recommend a PNG file) and the accent color on the right-hand side of the screen. You'll be able to adjust the width of the image manually.



When you're finished, you can see a preview by navigating to `/admin/email_templates/order_confirmation/edit` and clicking on "Send Test Email" or "Preview"



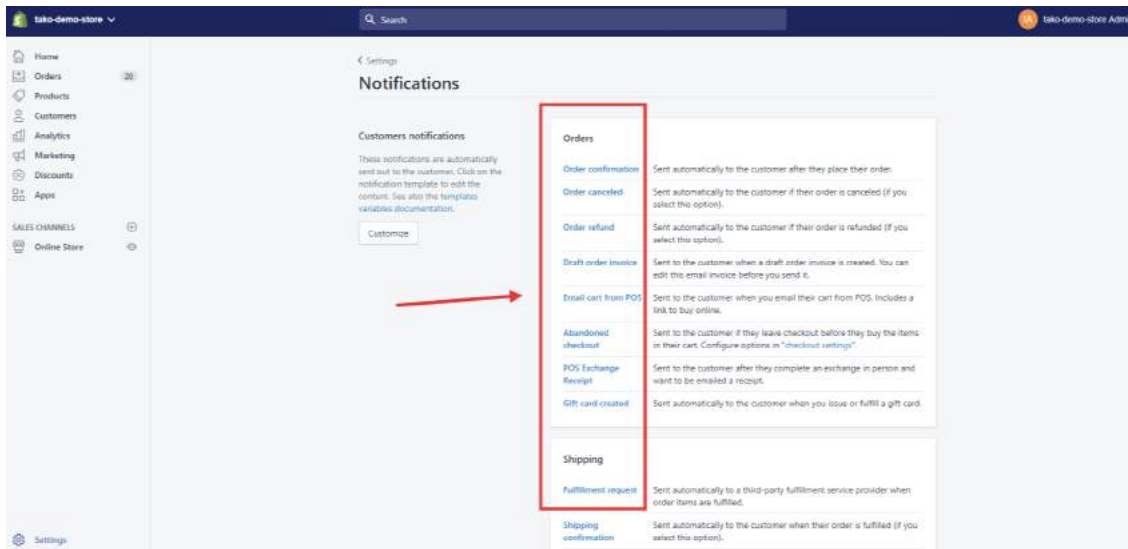
Warning:

Shopify templates are based on liquid code, so you might need to know liquid code in order to edit these templates. **When in doubt, ask your developer before making any changes** — or drop us a line at help@takoagency.com. We can create a custom email template just for you that'll carry your branding all the way through the customer experience.

If you'd like to try it yourself, here's how to do that.

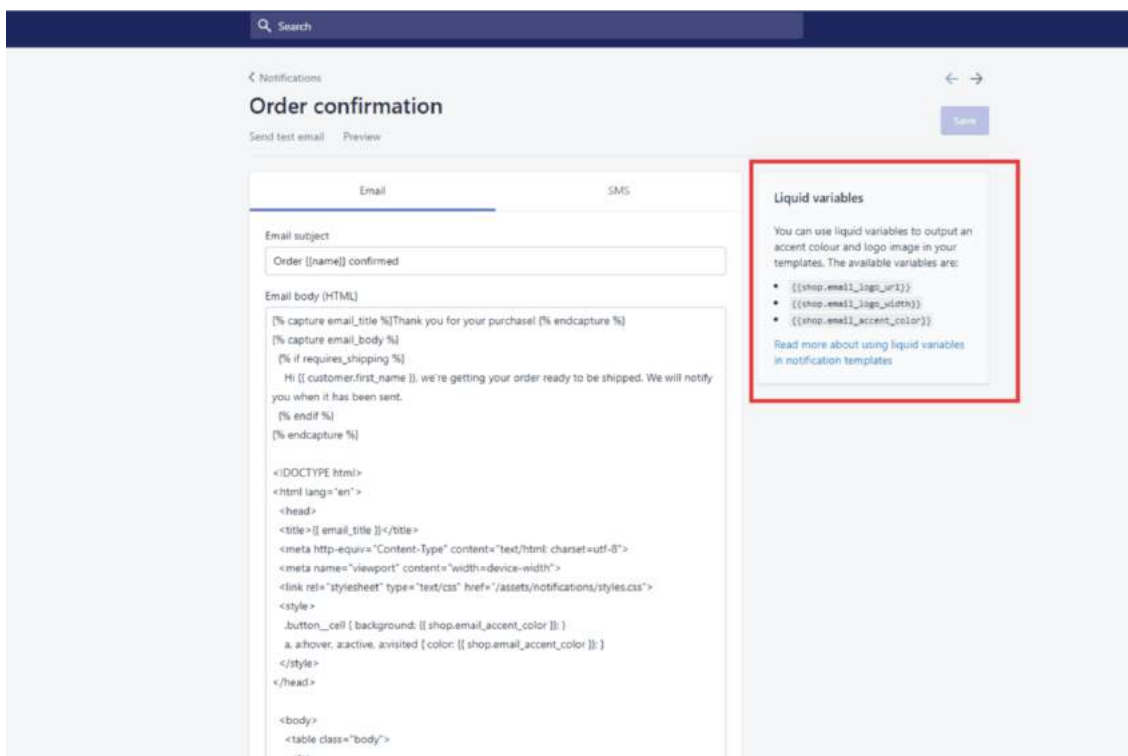
To customize an email template:

Step 1. Select the email template you want to customize.



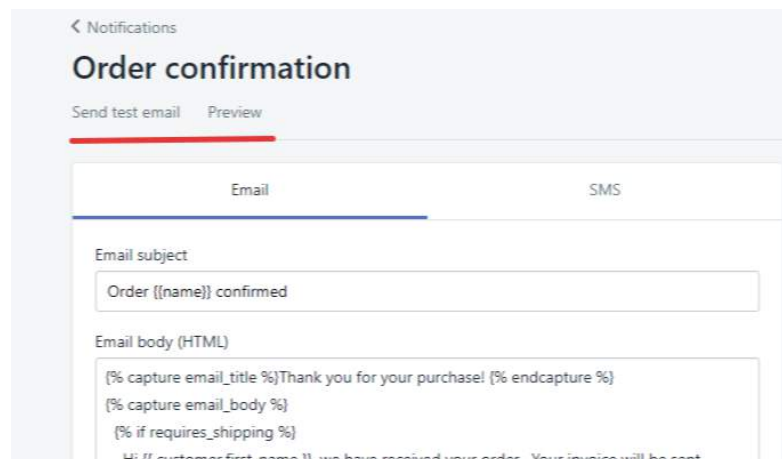
Step 2. Customize template for email or SMS.

You have the option to customize some aspects of the email by using liquid variables which can be seen in the right sidebar of the template.



However, before making any changes with liquid variables, we strongly suggest you study up using Shopify's resources: [Shopify variables](#)

When you are done, you can see a preview by clicking either the “Send test email” or “Preview” links.



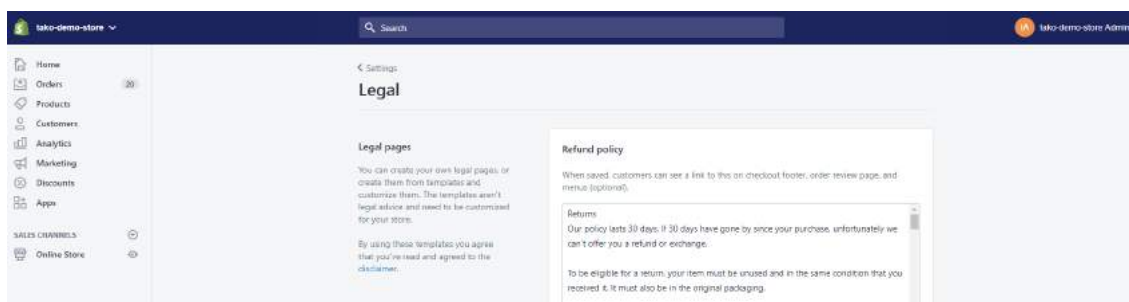
The screenshot shows the 'Order confirmation' notification template in the Shopify admin. It has tabs for 'Send test email' and 'Preview'. Below these are tabs for 'Email' (selected) and 'SMS'. The 'Email subject' field contains 'Order {{name}} confirmed'. The 'Email body (HTML)' field contains a template with liquid variables: `{% capture email_title %}Thank you for your purchase! {% endcapture %}`, `{% capture email_body %}`, `{% if requires_shipping %}`, and `Hi {{ customer.first name }}, we have received your order. Your invoice will be sent`.

Legal

URL </admin/settings/legal> 

There are a few legal items that also need to be addressed within your store: refund policy, privacy policy, terms of service, and shipping policy. You have two main options here: either copy and paste in your own text from elsewhere (such as your attorney) or you can use the templates provided by Shopify. If you select to use the templates, note that you must customize them for your store.

The links for each of these policies are displayed only in the footer of the checkout page by default.



The screenshot shows the 'Legal' settings page in the Shopify admin. It has a sidebar with navigation links: Home, Orders, Products, Customers, Analytics, Marketing, Discounts, Apps, and Sales Channels. The main content area is titled 'Legal' and includes a 'Legal pages' section with instructions on creating or customizing legal pages. To the right, there is a 'Refund policy' section with a text area for the policy and a 'Returns' section with a text area for the return policy.

Finances

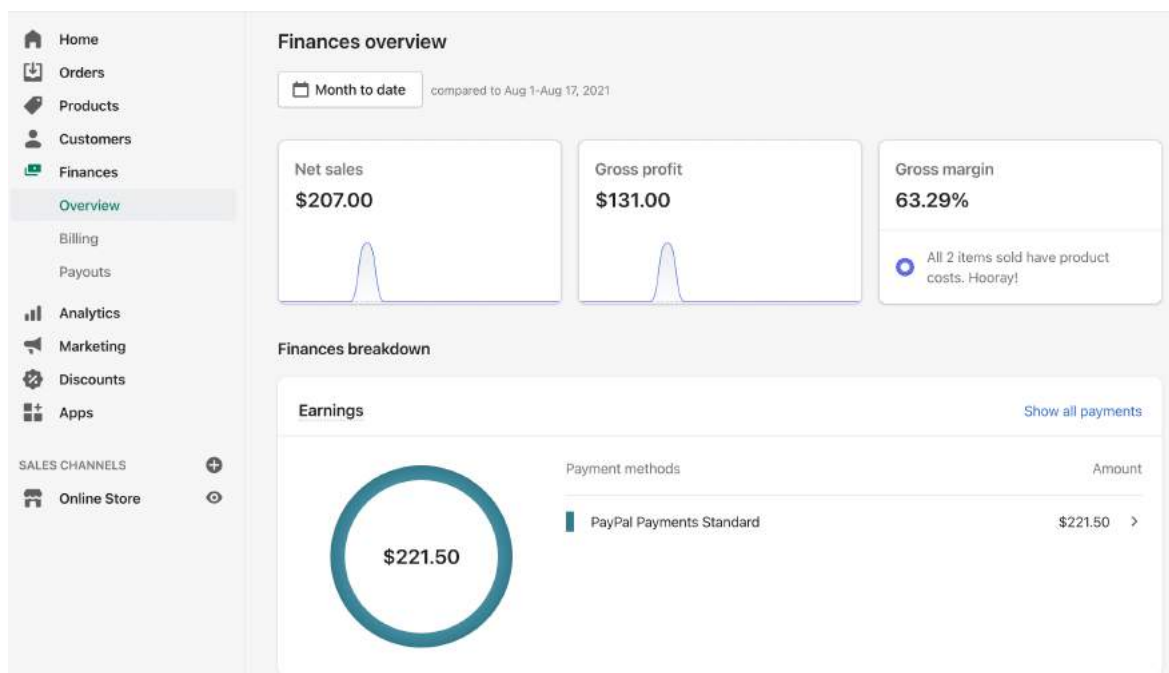
(2021 Update)

URL </admin/finances>

Finances is a new section of the Shopify Admin and has 3 sections: Overview, Billing, and Payouts. All of this data is available elsewhere in the Admin (such as in the Analytics tab) but Shopify has pulled it all together so you see the most important financial information in one place.

Overview

Overview shows a high-level view of your most important financials, with an available date filter.



Billing

Billing shows your billing history with Shopify as a merchant.

Payment methods

Manage how you pay your bills in Shopify.

Learn more about [your billing currency](#).

When balance is enabled, but the available amount isn't enough to cover the cost of your bill, your other payment methods will be used. Learn more about your [Shopify balance](#).

Use Shopify balance to pay your bills ☐

Default payment methods USD

VISA Visa **Primary** ending in [REDACTED] ...

[Replace credit card](#)

Bills

Your monthly bill is on a 30-day cycle. It includes your Shopify subscription, app charges, shipping labels, and transaction fees.

Learn more about [bills](#).

Current billing cycle: Sep 17, 2021-Oct 17, 2021

If you reach \$200.00 in fees before the end of your billing cycle, a fee threshold bill will be issued automatically. [Learn more](#)

Subscription charges	\$29.00
Running total	\$29.00

[View details](#)

Payouts

Payouts shows the payout history for your store.

Payouts Export Documents Transactions < >

All

Filter items Status Payout date More filters Saved

Payout Date	Status	Charges	Refunds	Adjustments	Fees	Total
Jun 1, 2021	Paid	\$103.50	\$0.00	\$0.00	-\$3.30	\$100.20 USD

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