

The Complete Shopify Checklist

Presented by Vevol Media

About Us

We at Vevol Media help businesses grow by leveraging our skills and expertise in web design and development, search engine, and conversion rate optimisation. E-commerce and Shopify are at the core of our services, and our team has extensive knowledge of how your business can take advantage of everything in the market.

Introduction

As a Shopify Development Agency, we understand the struggles of entrepreneurs launching their first online stores. Having a fully functional and optimised website is the first step in your e-commerce journey. That's why we built **the most comprehensive Shopify checklist!**

This tool will guide you through the process of setting up your store, from choosing a theme and customising it, to setting it up for success with powerful integrations. We also went beyond with tips and tricks about fulfilment, manufacturing, and supply chain. By going through this comprehensive list of tasks and best practices, we can guarantee you're on the path to success!

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I. General Store Setup

- 1. Domain Setup** - It is important that you begin your e-commerce journey by purchasing a unique domain.
- 2.** Add your **logo**, brand colours, and fonts to your Shopify Theme.
- 3.** Add your products to the store along with their SKUs/barcodes and prices.
- 4.** Activate the '*Abandoned Checkout*' email flow to increase the website's conversion rate and minimise abandonment.
- 5.** Import previous clients into Shopify using a third-party app like Matrixify or .csv files, if possible.
- 6.** Set up your preferred **Payment Gateway** to receive revenue.

 **TIP:** Create your brand guidelines and be consistent with them.

II. Product Management

- 7.** For each product, add relevant images, videos, titles, descriptions, types, and vendors.
- 8.** Create collections and ensure each product is added to at least one.
- 9.** Add **tags** and/or **metafields** to each product to optimise the website's search results and filtering capabilities.
- 10.** Add correct product specifications to all products, including inventory weight, country of origin, variants, etc.
- 11.** Add cost per item to easily track **sales and margins**.
- 12.** Customise the 'Transfers' section to more easily manage inventory shipments, if applicable.

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III. Web Design & Development

A. How to choose a Theme for a store

- 8. Pick a Shopify theme:** Official Shopify Themes undergo a thorough review before listing, including checks for speed optimisation, SEO, and design, to ensure their code complies with the latest development standards.
- 9. Test it:** Shopify offers a free trial for all themes before publication, allowing you time to test multiple themes in your store.
- 10. Customisation options:** Some themes offer more sections and customisation options by default. Do not select a theme solely because it is visually appealing; ensure it will be practical in the long term.
- 11. Scalability:** If you plan to grow your store over time, choose a theme that is flexible and scalable.
- 12. Custom development:** Dive into the theme's code only if you are familiar with Liquid, HTML, CSS, and JavaScript. Alterations to a theme's code can significantly impact its functionality.

B. Performance Optimisation


- 13.** Conduct regular audits with a **heatmap analyser** to gain a better understanding of the customer journey.
- 14.** Test your website across multiple resolutions, particularly on mobile devices, ensuring there are no bugs and that it adapts smoothly.
- 15.** Optimise your **website's speed** by minifying code and compressing images.
- 16.** Ensure text is easy to read and accessible for individuals with special needs.
- 17.** Design the website with the user in mind, ensuring it is free from confusion and **UI/UX friendly**.
- 18.** Ensure you include pages for FAQs, contact information, policies, shipping information, and a return form.

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IV. Apps and Integrations

- 19. Reviews:** Encourage reviews with Stamped, Judge.me, or Yotpo.
- 20. Loyalty:** Reward multiple purchases with a loyalty program using Rivo, Smile, or LoyaltyLion.
- 21.** Use **Shopify Flow** to automate processes.
- 22.** Manage **orders** and invoices using Order Printer or Ordersify.
- 23.** Offer top-notch **customer support** with Gorgias.
- 24. Cross-sell** and **Up-sell** with Search & Discovery (Shopify app)
- 25.** Translate & sell **internationally** with Shopify Markets and Translate & Adapt (Shopify app)
- 26.** Recover abandoned carts with conversational SMS using **Retrevo**.

 **TIP:** Adding numerous third-party apps will likely affect your website's speed, so choose only a few that will significantly benefit your store's interface.

V. Marketing Setup

- 27.** Conduct a comprehensive **keyword analysis** and optimise your store's content.
- 28.** Utilise **email marketing** to nurture your clients by setting up automated flows and sending weekly newsletters.
- 29.** Connect your social media pages to your store, including Facebook, Instagram, YouTube, TikTok, and Pinterest, among others.
- 30.** Set up periodic **discounts** or offer free shipping to incentivise clients.
- 31.** Utilise Google Ads to target key audiences derived from Google searches.
- 32.** Set up **Google Analytics** for comprehensive reporting.

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VI. Marketing Strategies

A. Search Engine Optimisation

- 1. Complete the Alt-text field for all images on the website and optimise the SEO Meta-Title and Meta-Description for products and pages.
- 2. Write relevant **blog articles**, publish them weekly, and share them on social media.
- 3. Obtain valuable backlinks from reputable publications.
- 4. Optimise your website's navigation using appropriate keywords.

B. Social Media

- 5. Regularly post **high-quality content** on all platforms.
- 6. Connect your product catalogue from Shopify to Meta and link products in your posts.
- 7. Use influencers to your advantage for increased brand awareness.

C. Paid Ads


- 8. **Test** multiple audiences, creatives, and copies to identify your ideal customer. Continuously optimise your ads and **landing pages**.
- 9. Leverage **retargeting** as an effective way to bring back potential customers who are already familiar with your brand.
- 10. Maintain consistency with your brand messaging, visuals, and tone of voice across your ads, ensuring they align with the look and feel of your store.
- 11. Incorporate limited-time offers, discounts, and coupons in your ads to drive sales and motivate people to make a purchase.
- 12. **Automated bid strategies** can help maximise your ad budget by adjusting your bids to reach your target audience at the lowest cost.
- 13. Plan ahead for **seasonal events** and holidays, such as Christmas, Valentine's Day, or Black Friday, and create ad campaigns that resonate with these occasions.

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VII. Supply Chain Management

- 1. Demand Planning:** Ensure you have sufficient products to meet customer demand by accurately forecasting your sales.
- 2. Information Flow:** Maintain a continuous flow of data regarding raw materials, work-in-progress, and inventory.
- 3. Materials Management:** Acquire the necessary raw materials needed for production. This step may not apply if you utilise dropshipping.
- 4. Inventory Management:** Organise and store supplies, work-in-progress, and finished goods efficiently.
- 5. Manufacturing and Production:** Choose to either outsource the manufacturing of your products or acquire the necessary equipment to produce them in-house.
- 6. Transportation:** Arrange for the transportation of your products, often by freight, from the manufacturing point to your warehouse or distribution centre.
- 7. Warehousing and Distribution:** Store finished goods until they are sold, ensuring they are ready for distribution.
- 8. Order Fulfilment:** Process orders by retrieving items from inventory, packing them, and shipping them to customers.
- 9. Returns Management:** Establish an efficient process for handling customer returns.
- 10. Customer Experience:** Prioritise the customer experience by ensuring the supply chain operates smoothly and efficiently, resulting in prompt product delivery.


 **TIP:** If this is your first online store, it is advisable to sell products you are familiar with to avoid potential complications or issues that may arise during the sourcing, manufacturing, or shipping processes.

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VIII. Manufacturing Process

- 1. Research:** Select a manufacturer that aligns with your company's values and ethical standards, such as working conditions and sustainability.
- 2. Communicate:** Be clear about your product specifications and any certifications required to the manufacturer to ensure they are met.
- 3. Negotiate:** Evaluate the cost of the product at different quantities to negotiate the best price per unit.
- 4. Packaging:** Research different options that can help reduce costs, protect the product, and make it stand out.
- 5. Recycle:** Sustainability is no longer a trend; it's a requirement. Consider the end-of-life of your product and have a plan for recycling.
- 6. Barcodes:** Obtain a barcode from a reputable and reliable barcode reseller, such as Official UPC Codes.
- 7. Transparency:** Ensure that the packaging includes a barcode and any necessary legal markings, as per the requirements.
- 8. Test:** Before starting to sell your products, test them yourself to make sure they work and look as expected.
- 9. Ship:** Even after carefully selecting the best packaging option, ship some orders to your friends and family to make sure they arrive intact.
- 10. Sample:** If you're not happy with the resulted product, change the specifications and create more samples. Don't settle for less; strive to achieve the product you would want to purchase for yourself.


 **TIP:** Be picky! Don't rush into a partnership with a manufacturer simply because they can produce your products at the lowest cost; prioritise long-term quality and reliability over short-term savings.

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IX. Shipping

- 1. Clear fees:** Establish clear shipping costs and delivery times for your customers.
- 2. Shipping carrier:** Contact multiple shipping carriers and find the one that suits your business best. Negotiate fees and sign a contract.
- 3. Add to Shopify:** Most carriers have an integration with Shopify to generate AWBs. Integrate using their apps or other third-party apps.
- 4. 3PL's:** Most starting businesses will work with a 3PL (Third-Party Logistics) to handle their stocks, as most of them offer fast shipping in the area.
- 5. Warehouses:** If you plan on having a wide variety of products and a large number of orders, find a specialised warehouse for your business.
- 6. Mode of Transport**
 - Sea:** most reliable, especially on long distances;
 - Rail:** most environmentally friendly and safe mode of transportation;
 - Truck:** most flexibility and fast delivery times;
 - Air:** fastest way of transport, useful for time-sensitive products.
- 7. Explore packaging options** to find the best fit for your products
 - Box
 - Pouch
 - Padded mailer
 - Flat box
 - Custom
- 8. Go local:** Collaborating with local shipping providers, manufacturers, payment gateways, and so on, is the easiest way to start an online store if you plan on selling in a specific country.

 **TIP:** Starting with domestic deliveries allows you to gain experience before expanding to international shipping, which can be complex and requires careful consideration of margins, as each market is different.

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Takeaways

We hope this Shopify checklist has offered valuable insights and tips for creating a successful online store on Shopify. Understanding that setting up an online store can be daunting, by adhering to the steps outlined in this checklist, you can ensure your store is **primed for success**.

Need a hand?

We are a passionate and dedicated team specialising in **e-commerce** and **Shopify development**. Quality drives us, and we maintain this standard with all our clients.

Offering a **wide array of services** for e-commerce business owners, from store setup and migrations to custom theme development, SEO, CRO, and bespoke design, no project is too ambitious or complex for us at Vevol Media.

We wish you the best in your e-commerce endeavours and stand ready to assist with any questions or needs regarding your store. **Together, let's grow your business!**

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