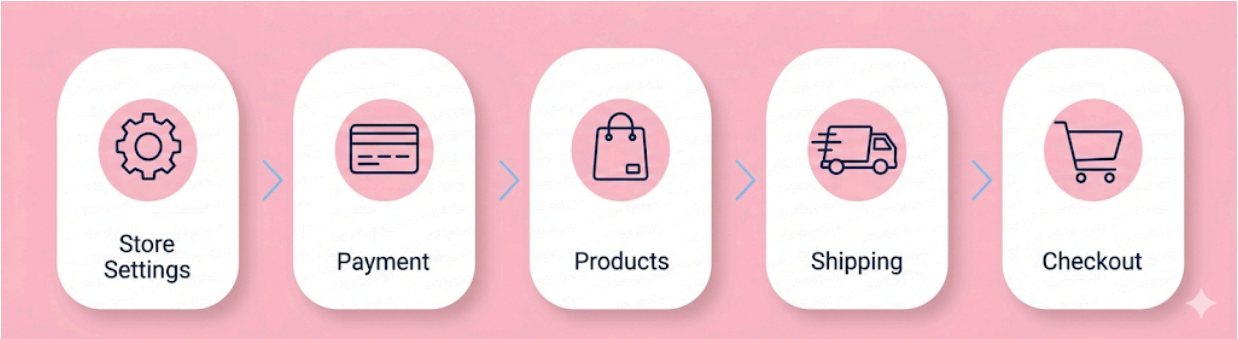


Getting Started on Shopify:

5 essential setup tasks

Lesson 1 companion guide | Use alongside the video lesson and product template exercise.

This guide contains everything you need to complete Lesson 1: Help Center resource links organized by setup area, a step-by-step product entry template and a pre-launch checklist to track your progress.

Help Center resources by section

Use these links to go deeper on each setup area after the video. Each article includes step-by-step instructions, screenshots and troubleshooting tips.

Want the full picture? Shopify's General checklist for starting a new store covers everything from setup through promotion. This lesson focuses on the five essential areas you need before launch, but bookmark that checklist for what comes next.

Store settings

Article	Link
Store settings overview	Setup your store
Setting business details	Setting business details

Payment gateways

Article	Link
Setting up payments in Shopify	Setting up payments
Payment providers available in your country	Supported payment providers

Products and collections

Article	Link
Adding products to your store	Add and update products
Creating collections	Create collections
Setting up shipping	Set up shipping

Shipping

Article	Link
Setting up shipping profiles	Shipping profiles
Shipping zones and rates	Shipping zones and rates

Checkout

Article	Link
Checkout settings	Checkout settings
Editing checkout	Editing checkout

Pre-launch checklist

Work through each area in your Shopify admin. Check off tasks as you complete them.

Store settings

- ☐ Store name is entered and accurate
- ☐ Legal business name is set
- ☐ Contact email is set up and monitored
- ☐ Store address is complete (used for tax and shipping calculations)
- ☐ Default currency is set
- ☐ Default weight unit is set
- ☐ Taxes are configured for your region
- ☐ Domain is set up so customers can find your store
- ☐ Store is password protected while you set up (remove password before launch)
- ☐ Privacy policy is added (use Shopify's template and edit to match your business)
- ☐ Terms of service is added
- ☐ Refund policy is added
- ☐ Policies are linked in your store footer

Payment gateway

- ☐ At least one payment provider is configured
- ☐ You've reviewed the fees and requirements for your chosen provider

Products and collections

- ☐ At least one product is added and set to Active
- ☐ Product title, description, price and images are filled in
- ☐ Inventory is tracked and quantities are set
- ☐ At least one collection is created
- ☐ Products are assigned to a collection
- ☐ Collections are added to your store navigation

Shipping

- ☐ At least one shipping zone is configured
- ☐ At least one shipping rate is set for each zone

Checkout

- ☐ Customer account settings are configured (guest checkout vs. required account)
- ☐ Checkout fields are reviewed and set to required or optional as needed
- ☐ You've previewed the checkout flow as a customer
- ☐ Order confirmation email is set up

Testing your store

Before you remove your password and go live, place test orders to confirm everything works end-to-end.

- ☐ Tested a successful transaction
- ☐ Tested a failed transaction
- ☐ Tested refunding and canceling an order
- ☐ Tested fulfilling an order
- ☐ Confirmed customers can complete checkout without a shipping or payment error

Ready to launch

- ☐ Store password is removed so customers can access your store

Store readiness self-assessment

After completing the checklist, rate your readiness in each area.

Setup area	Status
Store settings	Not started / In progress / Complete
Payment gateway	Not started / In progress / Complete
Products and collections	Not started / In progress / Complete
Shipping	Not started / In progress / Complete
Checkout	Not started / In progress / Complete

What's still missing? List any tasks you haven't completed and your plan for finishing them before launch.

Product entry template

Practice exercise: Use the information below to add your first product to your Shopify admin. Follow along with the video or work through it on your own using this guide.

Before you start: Download the four product images from the link below and save them somewhere easy to find. You'll upload them in the Media section.
Download product images (Google Drive)

1. Basic information

Copy each field into the corresponding section of the Add product page in your Shopify admin.

Product section	Information
Title	Beanie
Description	Stay warm and cozy through crisp autumn days with this classic wool beanie. Crafted from soft, breathable wool, it provides excellent insulation while remaining lightweight enough for layering. The timeless design works with any fall outfit, making it an essential accessory for seasonal style and comfort. Perfect for chilly mornings, outdoor adventures, or casual everyday wear.
Product type	Hat
Vendor	Your store name
Tags	Beanie

2. Pricing and inventory

Product section	Information
Price	30.00

Product section	Information
Compare at price	40.00
Tax	Check “Charge tax on this product”
Location	Skip this, you won’t have locations set up yet other than your store address.
Total inventory	40 *(distribute across variants — see section 3)*

3. Media and variants

Download product images (Google Drive)

Images

Upload the four product images you downloaded: Blue.jpg, Green.jpg, Brown.jpg and Purple.jpg. You can drag and drop them into the Media section or click to upload. Reorder them so Blue is first.

Variants

Add one option called **Colour** with four values: Blue, Green, Brown and Purple. Once you've added the option, Shopify will generate a variant for each colour. Enter the inventory and SKU for each:

Colour	Inventory	SKU (optional)
Blue	10	BEAN-BLU-01
Green	10	BEAN-GRN-01
Brown	10	BEAN-BRN-01
Purple	10	BEAN-PUR-01