Getting started on Shopify

5 essential setup tasks

Alysa Andrews
Mar 6, 2026

Project details

What problem are we solving

New Shopify merchants create an account and then stall. The admin has dozens of settings, no clear starting point and no indication of what's critical versus what can wait. The Shopify Help Center is excellent for step-by-step how-to guidance, but this lesson (the first of the series) does something different. It covers the why behind each setup area, packages the five most critical tasks into a single guided experience and sends learners to the right Help Center resources when they're ready to action each one.

Note: Demonstrated using a US-based store. Admin interfaces and payment gateways vary by country. There is no internal information used in this publication.

Content modality

How is the information curated for consumption

A self-directed video lesson showcasing the Shopify admin with voiceover, chapter markers and on-screen annotations. It includes an accompanying PDF lesson guide. Publicly available, no paywall.

Learners who need more detail are directed to Shopify Help Center articles linked throughout the lesson. Supporting materials include a lesson agenda with timestamps and a downloadable product template for the hands on practice exercise.

Delivery and distribution

How will users access the content

- Embedded in coordinating Help Center documentation
- Embedded within the Shopify admin, with content tagged to matching support ticket topics so Sidekick and chat systems surface it automatically to merchants searching for help

- Deployed in welcome email sequences to merchants flagged as 30 days or less on the platform, reaching learners at the moment they need it most
- Surfacing in customer support internal channels/documentation to be shared from our team directly

Measuring success

Define what makes the content successful

- Support ticket volume on covered topics before and after deployment (30-60-90)
- Video completion rate and drop-off points by chapter
- UTM-tracked click-through on all linked Help Center resources
- Engagement signals: comments, questions and replays on specific sections

This lesson is the first in a series. Individual video metrics are one part of the picture but the broader goal is program-level: are merchants launching with fewer gaps, finding the right resources and returning for the next lesson? That's what I'll be evaluating as the series grows.

Content Schedule

Plan out the timelines for launch

Use this document as the source of truth for lesson plans, storyboard copy and project status. All relevant issues are linked in the associated Github repository.

Last updated Mar 6, 2026

ID	Project	Owner	Due	Submission	Status
01	Topic approval	Alysa ...	Feb 2, 20...	Jan 19, 2026	Approved
02	Learner profile	Alysa ...	Feb 9, 20...	Jan 23, 2026	Approved
03	Storyboard draft	Alysa ...	Feb 17, 20...	Jan 30, 2026	Approved
04	Facilitation plan	Alysa ...	Mar 2, 20...	Feb 9, 2026	Approved
05	Lesson finalized	Alysa ...	Mar 30, 2...	Mar 4, 2026	Approved

Learner Profile

Who is the end user we're creating this for

Aspect	Description
Who	New Shopify merchants who created an account but haven't launched. Typically first time e-commerce store owners, entrepreneurs, or small business owners with limited technical experience.
What	Understand essential setup tasks, locate settings in Shopify admin, access detailed step-by-step instructions.
When	On demand, immediately after account creation or before creating first product.
Where	Personal device (can watch on phone but must follow along on laptop/desktop), asynchronous, while logged into Shopify admin, via public video platform. Note: United States store demonstration; interfaces vary by country.
Why	Avoid launching incomplete store, understand critical requirements, save time, feel confident tasks are complete, access implementation resources.

Learning objectives

Define the learning goals users will achieve

1. **Identify the 5 essential setup areas** they must complete before going live on Shopify
2. **Understand the purpose and importance** of each setup area (payment gateways, products/collections, shipping profiles, store settings and checkout configuration)
3. **Locate where each setup task is completed** within the Shopify admin interface
4. **Access accompanying resources** for detailed step-by-step instructions on completing each sub-task
5. **Complete a practice exercise** by adding test products to their store following the provided template

Assessment

Define how users achieve the learning goals

For a 35-minute lesson, assessments should be focused and immediately applicable. I've designed a three part assessment strategy. This layered approach provides immediate feedback, builds practical skills and helps learners create an action plan for completing their store setup.

Part 1: Navigation checklist (formative) Learners complete a checklist identifying all five essential setup areas in their Shopify admin, addressing Learning Objective 1.

Part 2: Hands on practice exercise (formative) Learners add at least one test product using the provided template, addressing Learning Objective 4.

Part 3: Self assessment (summative) Learners rate their completion status for each setup area and identify at least one area requiring further attention, addressing Learning Objective 5.

Validation

How will users know they achieved the intended goal

Learning Objective	Evaluation Method	Validation	Success Criteria
Access detailed instructions	Resource access activity	Learners successfully open appropriate Shopify help center article for all 5 areas	100% success in accessing all 5 resource articles
Complete practice exercise	Hands on assignment	Learners successfully add a new product with information provided	Product successfully matches the example provided on screen
Evaluate store readiness	Self assessment checklist	Learners complete checklist and identify at least one area needing further attention	Checklist completed with at least one area identified as needing work.

High-level lesson plan (agenda):

Total time: 35-40 minutes

Module/Section	Time	Content & Activities
Introduction	3-4 minutes	Welcome and lesson overview, learning objectives, what you'll accomplish by the end, prerequisites (Shopify account, access to admin)
Module 1: Store settings	5-6 minutes	Critical store settings before going live, where to find store settings in admin, overview of essential settings (store address, contact info, legal pages), what must be configured, link to detailed Shopify help articles. **Activity:** Review and verify store settings checklist
Module 2: Payment gateway setup	4 minutes	Why payment setup is critical before going live, where to find payment settings in admin, overview of payment provider options, what needs to be configured, link to detailed Shopify help articles. **Activity:** Review what payment gateways are available in your country.
Module 3: Products and collections	10 minutes	Why products must be added before launch, where to add products in admin, overview of product information needed (title, description, price, images), introduction to collections and why they matter, link to detailed Shopify help articles.

Module/Section	Time	Content & Activities
		Activity: Follow along exercise using downloadable PDF template to add premade test products
Module 4: Shipping profiles	6-7 minutes	Why shipping configuration is essential, where to find shipping settings in admin, overview of shipping zones and rates, what needs to be set up, link to detailed Shopify help articles. **Activity:** Identify shipping zones needed for your business
Module 5: Checkout	5-6 minutes	Why checkout settings matter, where to find checkout settings in admin, overview of key checkout configurations, what needs to be set up, link to detailed Shopify help articles. **Activity:** Review checkout preview
Review & resources	3-4 minutes	Quick recap of 5 essential areas, complete resource list with links, next steps for detailed implementation, troubleshooting resources.
Assessment	3-4 minutes	Follow along assignment: - Complete checklist of 5 areas and writing down any questions you have along the way - Successfully add a test product replicating what is shown on screen - Complete assessment of readiness to go live

Storyboard

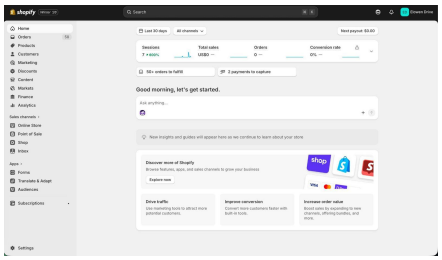
Use the template to create a working storyboard

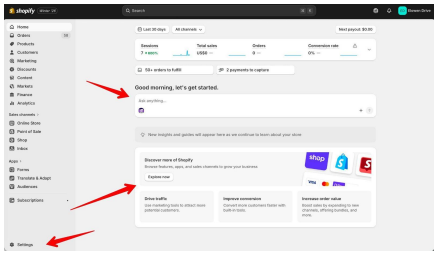
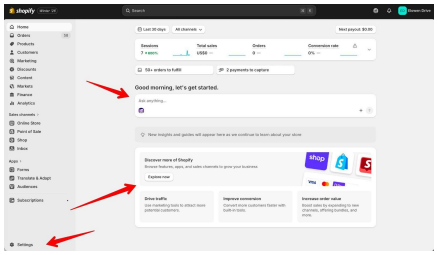
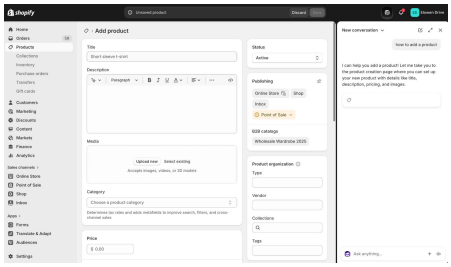
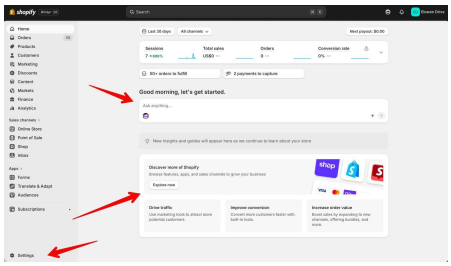
While the final video found here is hosted on YouTube, the script is written as it would be uploaded to a video hosting platform like Wistia. Comments would not be available and the video hosting platform would merely serve as a URL source to embed content within Shopify Help Documentation or other Shopify materials.

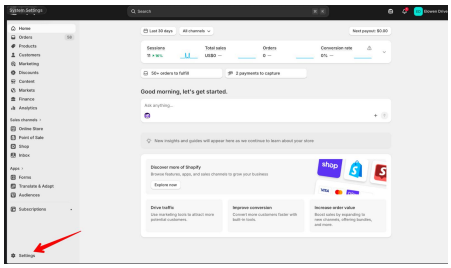
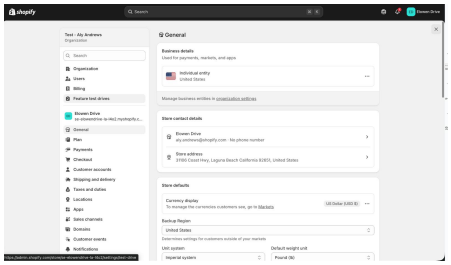
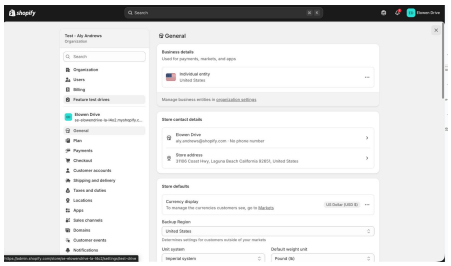
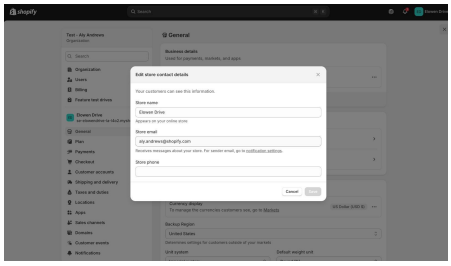
Wistia is the best video hosting platform because of its reduced costs of operation and ability to replace video content without breaking the URL. Meaning, when a video needs to be updated, its public facing URL does not change thus ensuring smooth user experience.

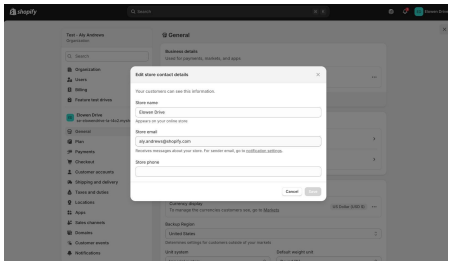
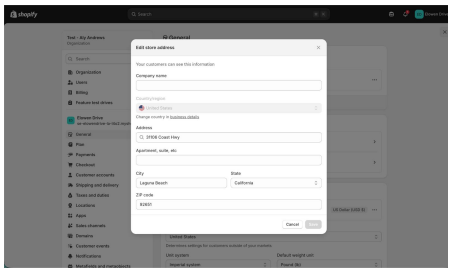
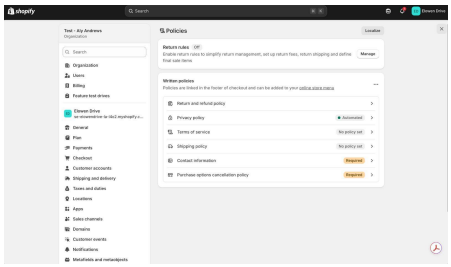
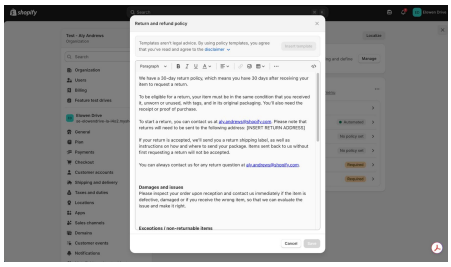
The script is also written with the intended audience as a new Shopify merchant preparing to launch their store. The final graphics package would be consistent with Shopify branding and adopting the company's tone of voice.

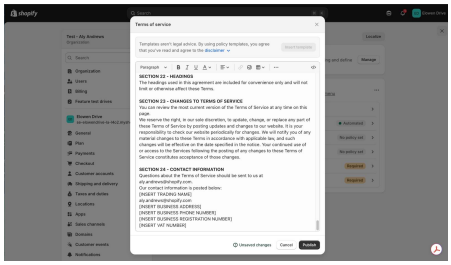
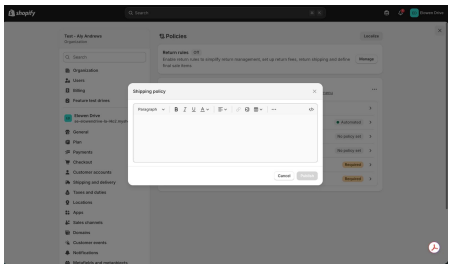
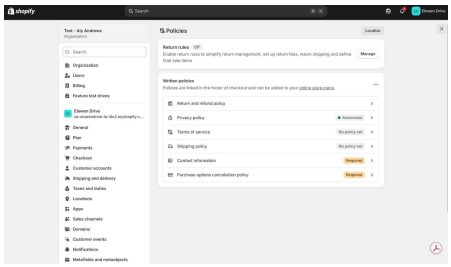
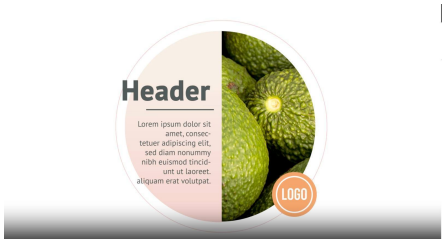
Storyboard	Voiceover
	Getting your Shopify store ready to launch means completing five essential setup tasks. Follow along with me, Aly, so you know exactly what you need to do to launch your own Shopify store. Let's get started.
	
	Let's go over the five critical areas you need to configure: Store settings Payment gateways Products and collections Shipping profiles And Checkout configuration

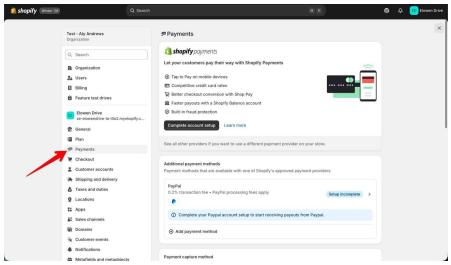
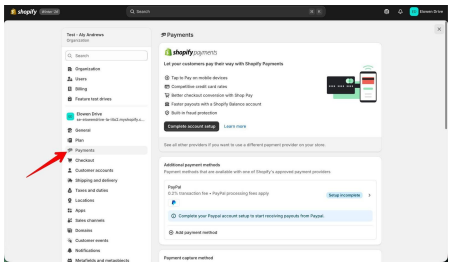
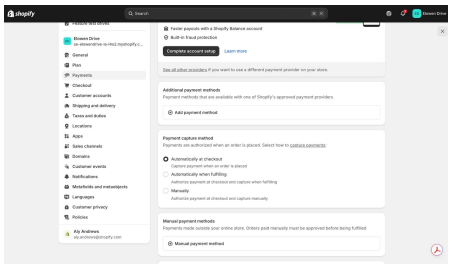
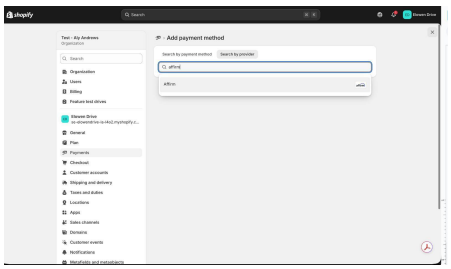
Storyboard	Voiceover
	I'll be using a Shopify store based in the United States, so keep in mind that your Shopify admin may look a little bit different, just depending where you live.
	I've also made a test product template for you to use today as a practice exercise. You can follow along while I add the same product and you can get a feel for how to do it yourself.
	By the end of this lesson, the goal is for you to know five essential setup tasks and where to find them in your Shopify admin. Today is going to be more of an introduction to the Shopify admin to get you familiar with the interface. Then when you're ready to start actioning some of these tasks, you can use the Getting Started with Shopify Launch guide I've made and visit the Shopify Help Center for more detailed instructions. Let's jump in!
	When you first log into your Shopify admin, you'll see your dashboard or homepage.

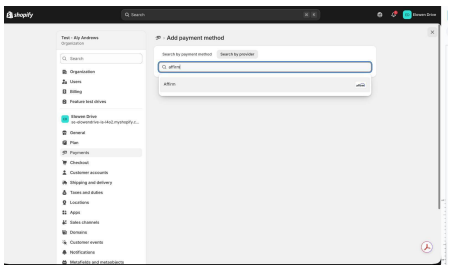
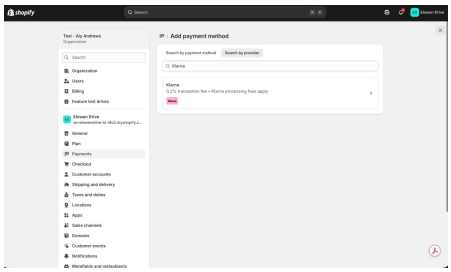
Storyboard	Voiceover
	This is your central hub where you can see an overview of your store's activity, recent orders and quick access to key areas. Now I don't want to spend too much time here, but I think it's important that you know what resources are available to you.
	My personal fave is Sidekick! A built in ai assistant that can answer any questions I have as I'm working on my store. Let's try one!how do i add a product .....
	How do I add a product? And now it's thinking, and bam, the page is opened and sidekick is ready to help me in the process. Pretty cool eh?
	Just going to exit this. The homepage also shows you any tasks that need attention, which is really helpful when you're just getting started.
	

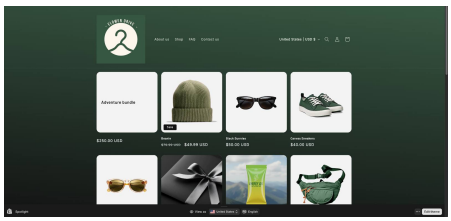
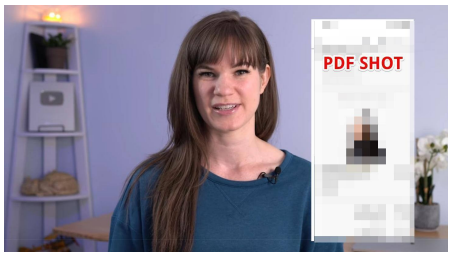
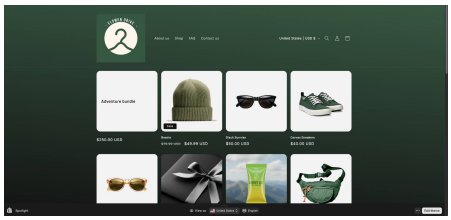
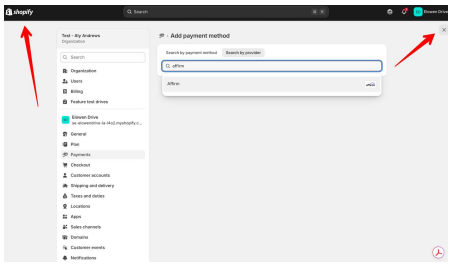
Storyboard	Voiceover
	The first essential setup task is reviewing the store settings. These are the foundational details about your business that need to be accurate before you launch.
	I'm going to start by heading over to the Settings area.
	Now I can see all the settings available to me. Again, this might look a little bit different if you're the account owner or if you're staff.
	For my store name and address, I'm clicking General.
	This page includes information about my business details, store contact, store currency and more.

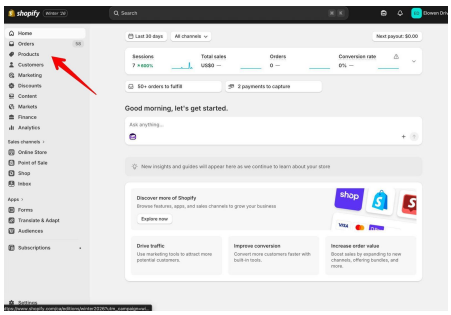
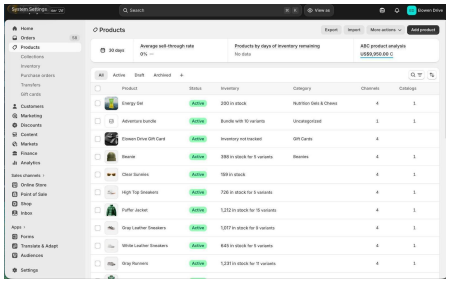
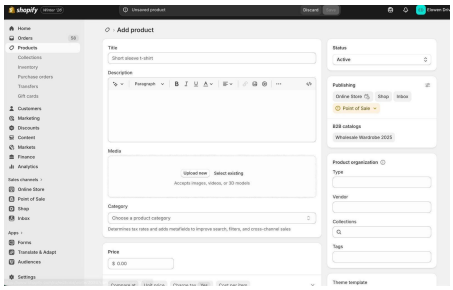
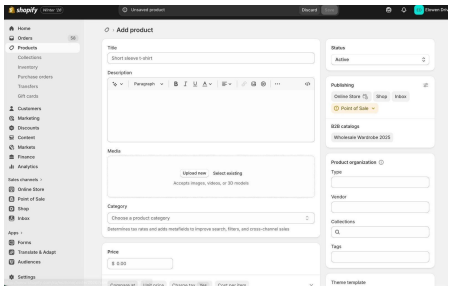
Storyboard	Voiceover
	Take a look at the contact details to make sure everything is up-to-date. My store's name is Elowen drive, I have my business email and I can also add a phone number here.
	Then underneath that we have the store address, and keep in mind customers can see this information. Your store address is particularly important because it's used for tax and shipping calculations, so make sure this is accurate before you go live. Your address will also show up in the legal policies in your store. So let's head over there now.
	There's a few policies listed here that are important to finalize before you launch your store. You might not know all of these details off-hand yet if you're just getting started and that's okay, you can always edit it later.
	But just as an example, for the return and refund policy there's a return address listed here. Now that might be what your store address is, or it might be a different address like a warehouse or an office space. These policies will all be customer facing, so getting these details exact is crucial.
	And hey, here's something that can save you a lot of time: for some of these store policies, Shopify gives you the option to self-generate a template like the terms of service.

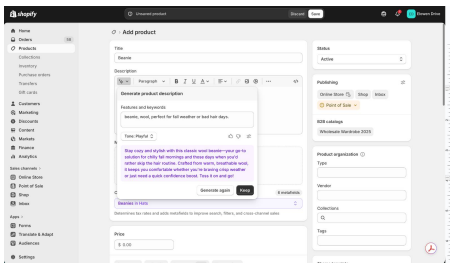
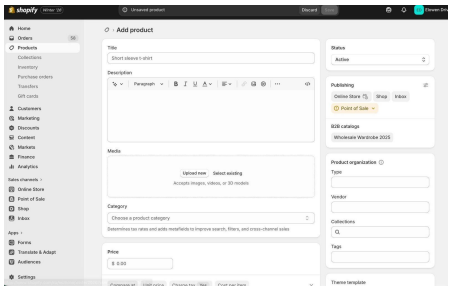
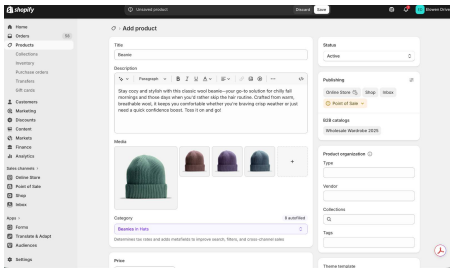
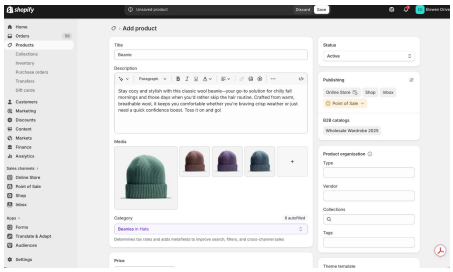
Storyboard	Voiceover
	When I click, Insert Template, that gives you a full block of text that you can then edit to match your business. So you're not writing from a blank page.
	For other policies, like shipping, you'll need to complete that yourself because shipping is so unique to every store. Don't worry though there's plenty of examples to pull from online. Some really great ones are shared in the Shopify Community.
	So take a moment to review your store settings that I just covered and make sure everything is filled out correctly.
	
	Now let's talk about payment gateway setup. This is absolutely critical because without a payment provider enabled, your customers won't be able to complete purchases – even if everything else about your store is perfect.

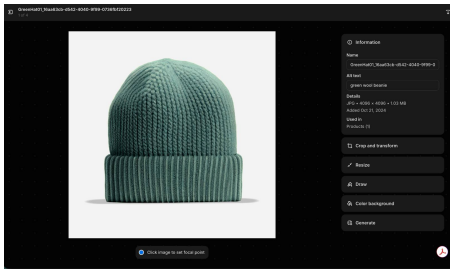
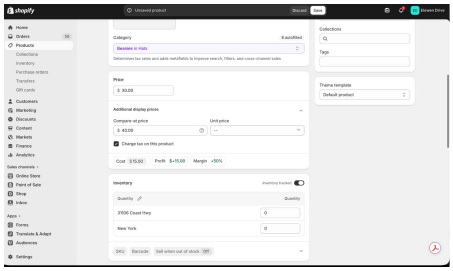
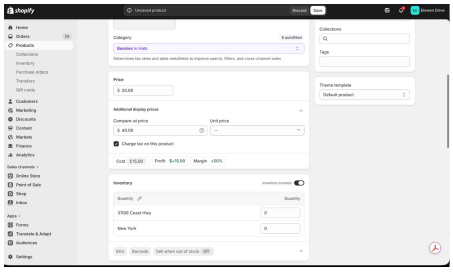
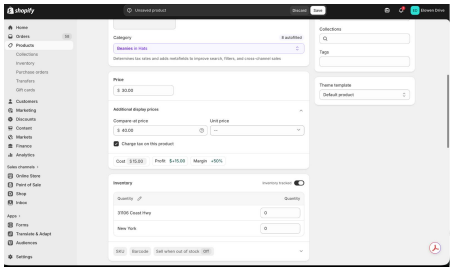
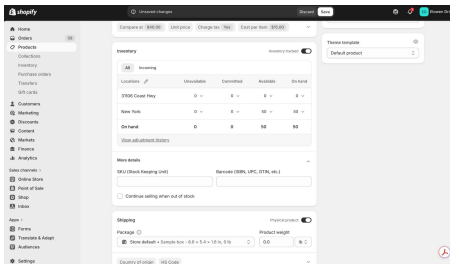
Storyboard	Voiceover
	By setting up your payment gateway early, you can test the entire checkout flow before launch. So you know exactly what your customers will experience when they go to pay.
	I'm still in the policies section, but from here I click Payments.
	If Shopify Payments is available in your country, you'll see it listed at the top – that's Shopify's own payment solution and my personal preference.
	If it's not available to you, or you want to add more options for your customers, search for other providers in additional payment methods.
	I'm going to search by provider and look for some popular ones that I know customers like to use where I'll be selling.

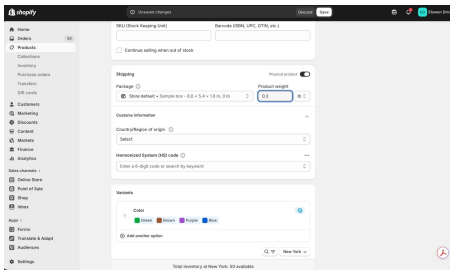
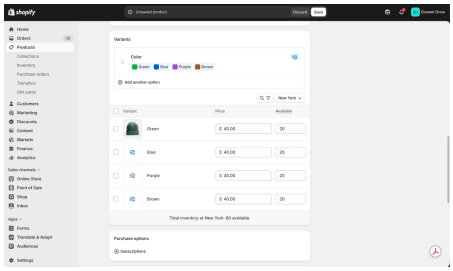
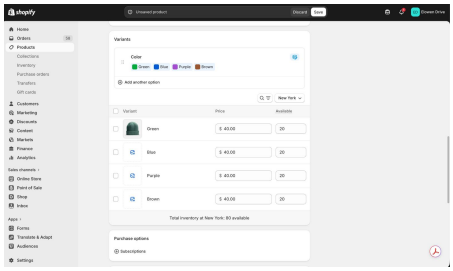
Storyboard	Voiceover
	Something like Affirm, which is a buy now pay later option.
	Or Klarna, that’s also one I’ve used myself when shopping.
	Ultimately the providers available to you will depend entirely on your store's location.
	Each provider also has its own fees and requirements, so when you're ready to set one up, be sure to do some research so you fully understand the platform you’re joining.
	For now, I just want you to take a moment and see what's available to you and think about what and where you’ll be selling. There’s more details on Shopify Payments and third party providers by location in the Shopify Help Center.

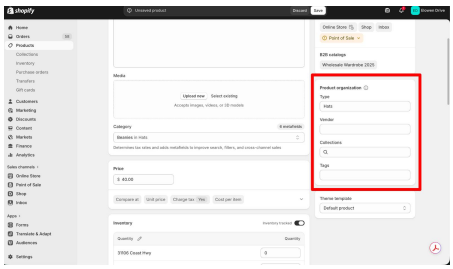
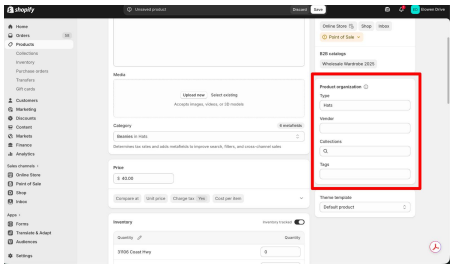
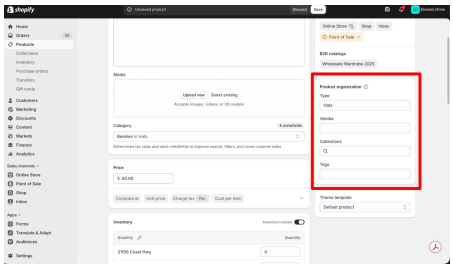
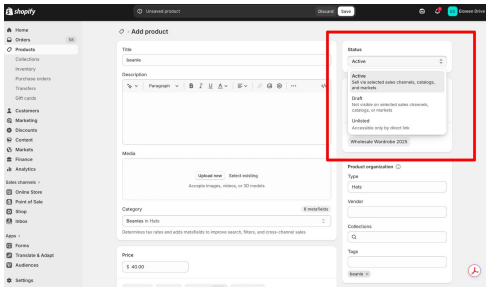
Storyboard	Voiceover
	
	Now it’s time to get into a fun setup task, adding products!
 	This is the part of the lesson where you use that product template I mentioned earlier. I'm going to walk you through the entire add product page from start to finish, section by section and add the same product that you have access to.
	You can watch the whole thing and then try to add the product on your own. Or you can pause the video as we go along and we’ll do it together.
	We’re still in the settings area, so to get back to the home page, either click the X or the Shopify logo.

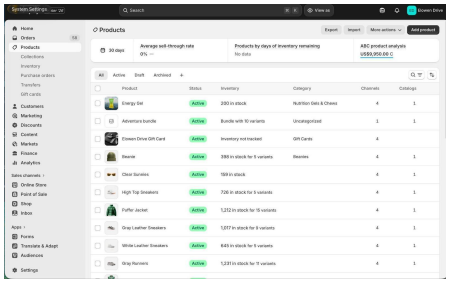
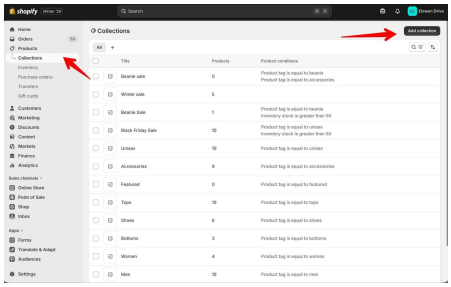
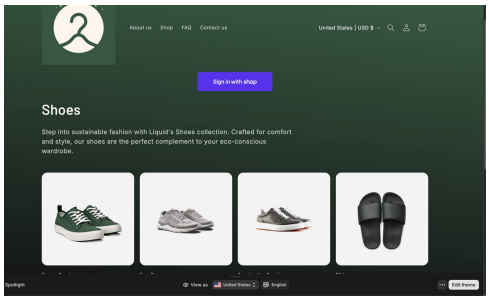
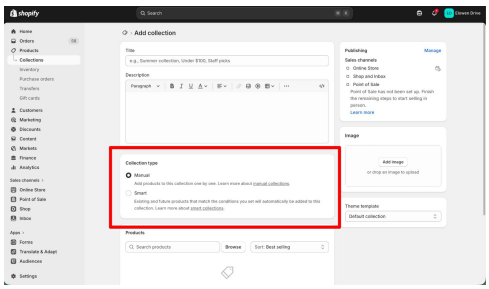
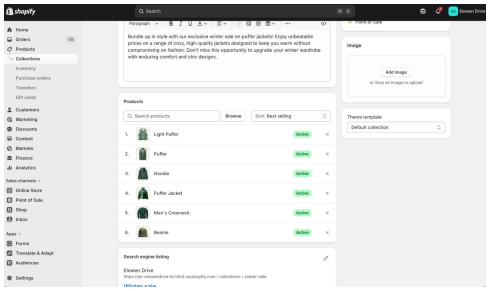
Storyboard	Voiceover
	Then, click on Products. This is where all the product management happens.
	You can see my store focuses on comfortable but cute athletic wear. At a glance, there's information about the product status, meaning if it's in my online store, the inventory levels and how many sales channels it's on. Now I'm going to click Add Product.
	At the top is the product title. This is what customers see in your store and in search results. I'm naming it Beanie, to keep it simple and to the point. In the template I gave you, all of these product details are listed, but you can also just make it up as you go for this practice run
	Right below that is the description. This is where you sell the product. Include details that matter to the customer like the material it's made of, why they need this in their life or how to use it. I like to think of it as problem solving - what problem is my product solving for the customer. For this example, I'm solving the issue of having cold ears or hiding a bad hair day.

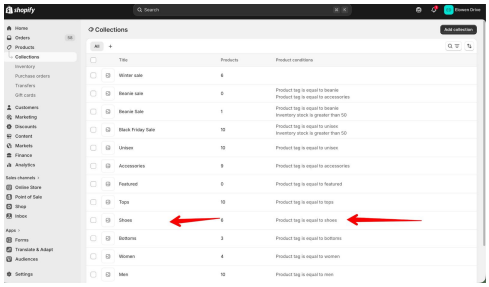
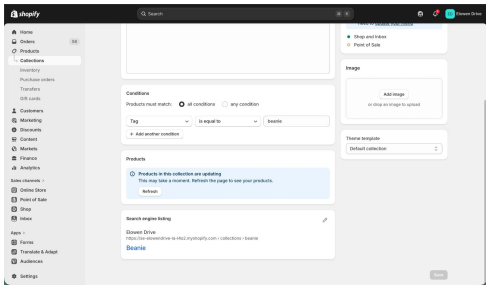
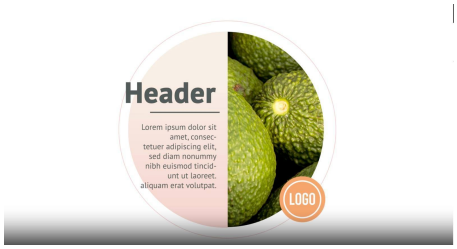
Storyboard	Voiceover
	I like to use the generate text button to give my description a little more polish. I’m entering key words like beanie, wool, perfect for fall weather and bad hair days. Beanie, wool, perfect for fall weather and bad hair days. Then I want the tone to be playful and generate! What do we have? Okay I like that! Very on brand for me. You can generate it again or click keep and then edit as you see fit.
	Next is the Media section where I’m going to add some images. You'll want to add at least one product image so customers can see what they’re buying.
	Upload an image from the desktop or drag and drop the Beanie picture I provided. I’m adding four different colours of Beanies that I’m selling.
	The first image is usually the main one that customers see in your storefront. So if you want another one, you can reorder them by dragging them around.

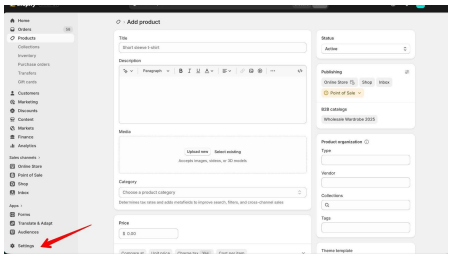
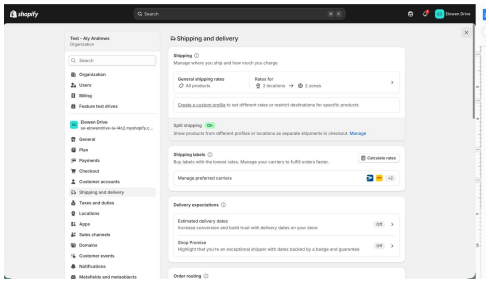
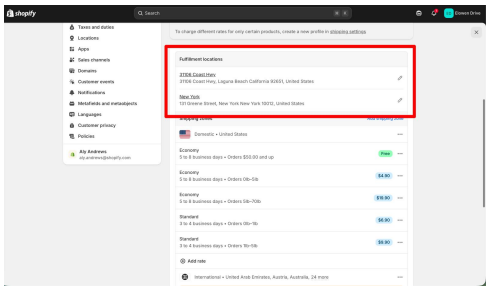
Storyboard	Voiceover
	Then, click on one of the pictures and add some alt text. This is a good idea for accessibility and for search results. I'll add "green wool beanie" and "save" green wool beanie
	Below that is the Pricing section. Enter the price in the currency your store uses. For me, that's USD. 0.2lb If you want to show a compare-at price, which means it'll show a strikethrough "was 40, now 30" so it's on sale, you can add that here, but that's optional.
	Then charge tax on this product. Cost per item is optional and customers don't see it. But some merchants use it to track margin and profit.
	Because don't forget, you still have to ship the item and that cost will eat into the profit too. So that needs to be taken into consideration too.
	In the inventory section, enter the amount of units you have on hand to ship. I have two locations that I ship from but these beanies are only available in New York right now and I have 40 in total, SKUs are optional, but they're strongly recommended if you want cleaner operations and reporting. Each SKU should be unique per variant (for example, each size/color combination should have its own SKU). I'm

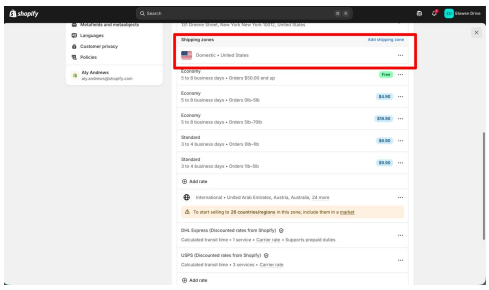
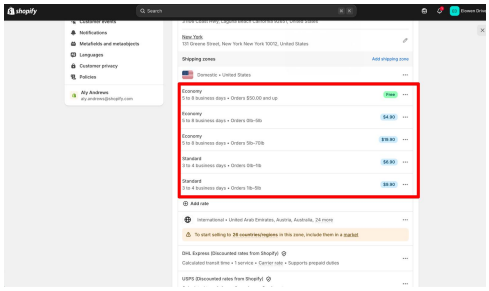
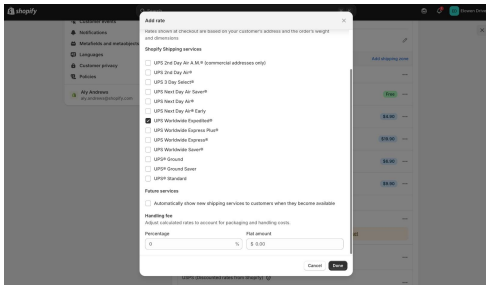
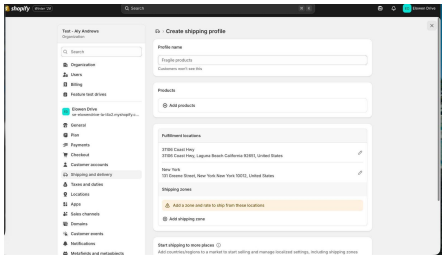
Storyboard	Voiceover
	leaving this out for now, but certainly something you can revisit when you get more variants of a product. I don't select Continue selling when out of stock, because I don't know exactly when I get my next shipment. This is just to be sure I can always ship an order and the customer isn't waiting.
	For shipping, I'm keeping the store's default sample box for now and I'm entering the beanie weight which is about 0.2lbs. Weight is important for calculating shipping costs so always include these details.
	If your product has variants like different sizes or colours, like mine this is added in the Variant section. Variant is another word for option, like what other colour options are available? You may even see this section already filled out based on the images uploaded earlier. Shopify will create a combination for each option – so if you have sizes S, M, L and colors Red and Blue, you might get six variants. You can then edit each one individually. You might not even need variants at all, in which case you can skip this.
	Now, remember how I said I had 40 beanies on hand? Well now I need to specify how many of each colour I have. In my New York location, I set the inventory level for each colour of beanie which is 10 each.

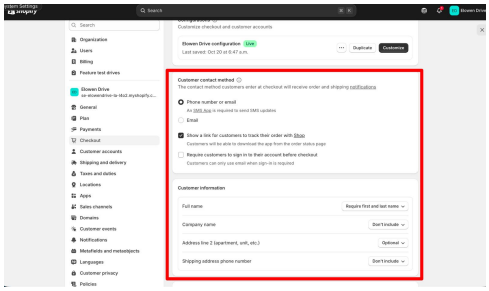
Storyboard	Voiceover
	There’s also fields for product type and vendor. These are optional but useful for organizing your catalog and for automated collections later. The product type might be something like "T-shirt" or "Hats" – whatever category fits.
	Vendor is useful if you have multiple suppliers or brands. I don’t personally have multiple suppliers so I just leave this blank. Collections, I’ll touch on that shortly.
	Then tags! Product tags are searchable keywords you assign to products to organize, search, filter, and bulk edit products in your Shopify admin. These details are not shown to your customers.
	Finally, before you save, double-check the product status. You can save as Draft if you're not ready for it to show on the store yet, or set it to Active when it's ready to sell. For the practice exercise, saving as Active is fine so you can see how it looks on your storefront. Once you're happy with everything, click Save. Now I know I didn’t cover the Publishing section, but this is a whole other topic on its own that deserves a deep dive so you can learn about what sales channels are, because that’s where customers will buy your products.

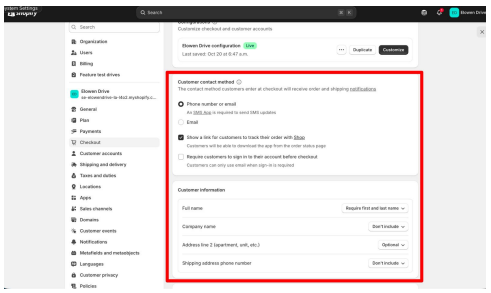
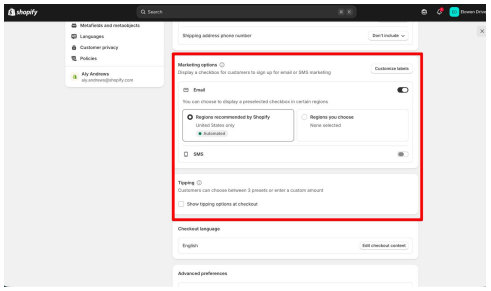
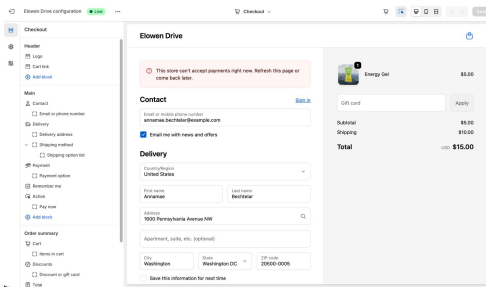
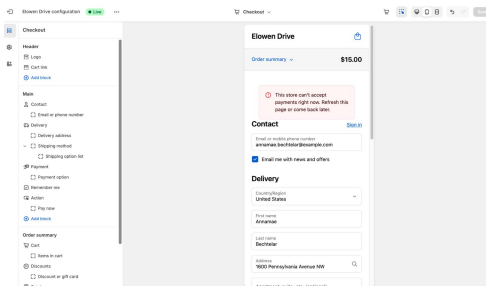
Storyboard	Voiceover
	After you save, you'll see the beanie listed in the product page. You can click on it anytime again to edit it as needed.
	Now let's talk about collections. Collections help organize your products into groups so customers can browse by category or theme.
	For example, you might create a featured collection with your best selling products, or you might organize products by category like what I have here, for shoes. There's two types of collections: manual and smart.
	With a manual collection, you choose exactly which products go in it. You add and remove products yourself, one by one. That's great when you want full control – like a seasonal collection where you're hand-picking what's included.
	Manual collections are simple to set up: you create the collection, give it a title and maybe a description and image, and then you go in and add the products you want. Here I'm searching for the beanie product we just added. Then I click Done and it's in there now.

Storyboard	Voiceover
	Manual is a bit more upkeep, but you get exactly the mix you want.
	Now I'll show you a smart collection. From the collections page, you can already see which ones are smart based on the conditions that are showing. This smart collection is showing the tag "shoes". So any time I add a product and tag it with "shoes" it's automatically added here.
	I'll show you a quick example with the beanie we just made. Click add collection, give it a title and click Smart. For the conditions, I'll add tag is equal to beanie, then click Save. Now you can add multiple tags and stack the conditions to get as specific as you want. Keeping the products organized is so beneficial for when the catalogue and inventory grow over time.
	Both types are useful depending on your needs, and you can mix them – some collections manual, some smart. Once your collections exist, you can add them to your store's navigation so they appear in your menu.
	

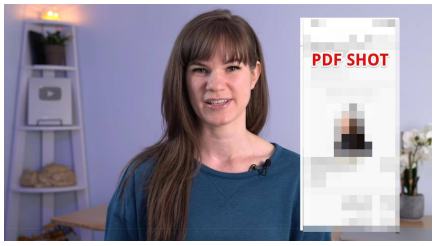
Storyboard	Voiceover
	Now let's talk about shipping. Not only is it important to set up in your Shopify admin properly, it’s also so essential to be clear with your customers about what your shipping costs and timelines look like. Shipping costs at checkout, can be what makes or breaks a sale.
	For me? I need to know exactly what shipping costs up front and when I can expect to receive my order. If I get a surprise $20 fee at checkout when I thought it was free shipping, guess what? I’m not making that purchase. So let’s make sure you don’t make that same mistake.
	Right now I’m still in the collections area, but I'm going to head back to Settings click on Shipping and delivery.
	These settings determine how shipping costs are calculated, what delivery options are available to customers at checkout, and which locations fulfill the orders.
	I’m opening my general shipping rates. Now this is the rate that’s applied to all of my store products right now. My fulfillment locations are in California and New York, which means I ship products from these two addresses.

Storyboard	Voiceover
	Then we have the shipping zone. This defines where you're willing to ship. This setup shows the United States, since that's domestic for me and I want to start with familiar territory before I expand.
	That rates showing are manual rates that I created. This determines how much customers pay for shipping within this specific zone. So you can see orders over $50 in value, get free shipping regardless of the weight. The other rates are organized in a tier fashion, where the heavier the shipment, the more it costs. And the faster the shipment the more it costs.
	You can also connect carrier accounts like FedEx or UPS so real-time rates show at checkout. The carriers available to you will again depend on your business location. If you're eligible to use Shopify Payments, the payment gateway we discussed earlier, you'll also get access to discounted shipping labels in the Shopify admin.
	The key thing to understand is that you need at least one shipping zone and rate configured before customers can complete checkout. So think about: - where you plan to ship - what it costs to ship your products there - And what you need to charge customers to ensure you're making a profit

Storyboard	Voiceover
	It takes a little time to work out those details, but you can feel confident as a business owner after you take the time to do some research.
	
	Finally, let's talk about checkout. Checkout is the final step before a customer completes their purchase, so these settings control how that experience works.
	While Shopify's default checkout works well for most stores, you may want to customize certain aspects to match your brand or business needs.
	I'm staying in Settings and clicking on Checkout. There's quite a few options here and you might not need to edit everything. For the contact method, I like to give customers the option to choose if they prefer giving their phone number or email address so I leave that as is. There's a checkbox for requiring customers to sign in to their account before they make a purchase. For now, I'm leaving this blank to reduce friction at checkout. I may enable later as my business grows though.

Storyboard	Voiceover
	You can also customize the checkout fields – like adding a phone number or company name. But you can decide which fields are required versus optional.
	There's an option to display a checkbox for customers to sign up for some marketing content, which I do have this included because it'll be helpful when I go to run some promotions. I'm selling clothes so I don't include the tipping checkbox, but this is a great option if you plan to do some in-person selling.
	Now let's go back and click customize. This is where you're going to get an idea of what checkout looks like from a customer view. Some of this information is mandatory and will always appear in the checkout, but you can also add some other information blocks in there too, just depending on what apps you have installed.
	I have the subscription app Skio in my store, so I can add that as a block at checkout. I also always like to preview what the checkout looks like from the mobile point of view. Because let's face it, most people are shopping from their phones these days. This helps you understand the customer experience and make sure everything looks right before you launch.

Storyboard	Voiceover
	
 	That was a lot of information and if you're still watching, I appreciate you taking the time to complete this lesson. Let's do a quick recap of the five essential setup areas we covered today. First, we covered store settings – your business information, address, and legal pages need to be accurate. For policies, remember that some can be self-generated and then edited, and for others like your shipping policy you can look to the Shopify Community for great examples.
	Second, payment gateway setup – you need a payment provider configured so customers can pay for their orders. No two providers are the same, so take some time to do your due diligence and see what providers are available in your country and what their fees are.
	Third, products and collections – We walked through how to add a single product, but remember there are options for adding and editing products in bulk too.

Storyboard	Voiceover
	Fourth, shipping profiles – customers need to know shipping costs and delivery times. No one likes a surprise shipping fee at checkout.
	And finally the fifth set up area, checkout configuration – how customers complete their purchases and what it looks like from their end.
	All five of these areas are essential and need to be finalized before you launch your store. At the end of this video, I've included the launch guide for Getting started on Shopify. It includes links to the step-by-step instructions for each setup area.
	You'll also find links to troubleshooting resources and the Shopify Community Forums if you need more support.
	Then, after you've had some time to explore your store and do some setup, complete the self assessment in the launch guide to rate your readiness to go live.

Storyboard	Voiceover
	Identify which areas you've completed, which need more work, and create a plan for finishing any remaining tasks.
	Thanks so much for joining me today! I'll be covering sales channels and analytics in our next session together. Bye for now!
	