

Shopify Store Setup & Optimization — Workbook

This workbook turns the course into a finished, live Shopify store that takes payments and ships orders. Each section maps to a course module and combines hands-on exercises, fill-in worksheets, and verification checklists. Work through it with your Shopify admin and theme editor open in another tab, and by the end you will have a public store on a custom domain with converting product pages, working checkout, accurate shipping, a lean app stack, and a plan to keep raising conversion rate.

Set Up Your Store and Choose a Theme

Lock your plan, theme, brand basics, navigation, and policies before you add a single product.

Worksheet: Store Brief and Plan Decision

Fill in each field to define what this store sells and how you will pay for it. Confirm choices during your free trial before subscribing.

What you sell (one sentence) and who it is for

The single most important action a visitor should take (your primary CTA, e.g. Shop Now)

Will you use Shopify Payments as your main processor? (Yes/No)

Chosen plan (Starter / Basic / Shopify / Advanced) and why

Billing choice (annual for the discount, or monthly)

Store currency and home market

Three competitor or inspiration stores and what you admire about each

Exercise: Pick a Theme and Learn the Editor

Choose a theme by structure, not demo look, and build the muscle memory of section editing before designing any page.

- Start with the free Dawn theme (or name the specific feature a paid theme adds that Dawn lacks).
 - In the theme editor, add, reorder, hide, and duplicate at least three sections on the homepage.
 - Set your logo, two fonts, and color schemes in Theme Settings so the change applies store-wide.
 - Toggle the device preview and confirm the homepage looks right on mobile.
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Exercise: Build Navigation and Generate Policies

Create the menus and required policy pages a trustworthy store needs.

- Build the main menu with about five items, nesting collections under a Shop dropdown if your catalog is large.

- Build the footer menu with secondary links and policy pages.

- Generate Refund, Privacy, Terms, and Shipping policies in Settings then Policies, and tailor each to your business.

- Set the cart type (drawer or page) and add a favicon.

Checklist: Foundation Setup Complete

- Trial started; no payment made until the store is ready
- Theme chosen by structure match (Dawn unless a specific need)
- Logo, two fonts, and color schemes set in Theme Settings
- Main menu built with about five items; footer menu built
- Refund, Privacy, Terms, and Shipping policies generated and tailored
- Cart type set (drawer or page) and favicon added
- Store currency confirmed in Store details before any sale
- Primary CTA decided and visible in the header

Products and Conversion-Focused Pages

Add products cleanly, write copy that sells, organize collections, and build a product page that converts.

Worksheet: Product Build Sheet

Complete one set of fields per product before entering it in Shopify. Keep variants lean and weights accurate.

Product title (benefit-led)

Options and values needed (e.g. Size: S/M/L; Color: Black/White) — keep minimal

Price and (only if a genuine discount) compare-at price

SKU per variant

Weight per variant (needed for shipping)

Image plan (number of shots, consistent aspect ratio, target under 500KB each)

Track quantity? (Yes/No) and starting stock

Meta description and URL handle for SEO

Exercise: Write a Description That Sells

Draft product copy that answers the shopper's real questions and prevents returns.

- Open with the single biggest benefit in plain language, before any specs.
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- Write a scannable bulleted list mapping each key feature to its benefit.

- Add the facts that prevent returns: size chart or dimensions, materials, care, and what is in the box.

- Write a unique meta description and clean URL handle in the Search engine listing section.

Exercise: Organize Collections with Tags

Tag products deliberately, then let automated and manual collections do the merchandising.

- Tag every product consistently (for example material, color, season, and a sale tag).

- Create an automated collection by a single condition (e.g. Tag is new-arrival or Price under 50).

- Create one manual collection for curation, such as Bestsellers or a gift guide.

- Add a short collection description, set its SEO and image, and enable on-page filtering.

Checklist: Converting Product Page Built

- Above the fold on mobile: gallery, title, price, variant picker, high-contrast Add to cart
- Benefit-led description plus scannable specs and sizing block
- Reviews section with star rating and photos placed on the page
- Secure-checkout and guarantee badges plus visible shipping and return terms
- Honest urgency only (real low stock, genuine sale dates, free-shipping nudge)
- Shop Pay and dynamic Buy It Now checkout buttons enabled
- All images optimized, consistently sized, and alt-texted
- Page reviewed on a real phone for layout and load

Payments, Checkout, Taxes, and Shipping

Make the store able to take money correctly and quote accurate, profitable shipping.

Exercise: Enable Payments and Test Checkout

Turn on payments the way that minimizes fees and friction, then prove checkout works end to end.

- Activate Shopify Payments and complete business and banking details for payouts.

- Enable Shop Pay, Apple Pay, Google Pay, and add PayPal as a secondary method.

- In Checkout settings, allow guest checkout and turn on abandoned-cart recovery emails.

- Place a full test order (Bogus Gateway or a real card you refund) and confirm the order and confirmation email appear.

Worksheet: Tax and Store Details Sheet

Set the store-level details checkout depends on and your tax approach. Confirm obligations with an accountant beyond your home region.

Legal business name and address

Store currency (set before first sale)

Tax model: prices include tax (VAT-style) or tax added at checkout (US/Canada-style)

Regions where you are obligated to collect tax

Automated tax calculation enabled? (Yes/No)

Customer-facing sender email

Confirmation and shipping notifications branded with logo? (Yes/No)

Worksheet: Shipping Rate Planner

Plan accurate, profitable shipping before configuring it. Cover your zones, rate model, and a free-shipping threshold.

Regions you will actually ship to (your shipping zones)

Rate model per zone (free / flat / weight-based / carrier-calculated)

Flat or weight-based rate amounts

Heavy or bulky products needing a separate shipping profile

Average order value (to set the threshold above it)

Free-shipping threshold amount

Delivery time promise to state on product pages and the Shipping policy

Checklist: Money and Shipping Verified

- Shopify Payments active; Shop Pay, Apple Pay, Google Pay, and PayPal enabled
- Dynamic checkout buttons showing on product pages
- Guest checkout allowed and abandoned-cart emails on
- Tax regions set and tax-inclusive vs tax-added chosen correctly
- Automated tax calculation enabled where available
- Accurate weights on every variant
- Shipping zones and rate model set; heavy items on a separate profile
- Free-shipping threshold set a little above average order value
- Real test order placed: payment, tax, shipping, and email all confirmed

Apps, Launch, and Conversion Optimization

Add a lean app stack, run the full pre-launch checklist, go public, and keep lifting conversion.

Worksheet: Lean App Stack Planner

Justify each app before installing it. Aim for three to five and re-check storefront speed after each install.

Reviews app chosen (e.g. Judge.me or Loox) and monthly cost

Email/SMS app chosen (e.g. Shopify Email or Klaviyo) and monthly cost

Upsell/cross-sell app chosen (e.g. ReConvert or a bundles app) and monthly cost

For each app: the specific revenue it earns or hours it saves

Recent review rating checked? (Yes/No)

Storefront PageSpeed score before and after installing

Any app to uninstall because it cannot justify its cost

Exercise: Connect Domain and Run Pre-Launch Checks

Make the store professional and prove it is ready before removing the password.

- Connect your custom domain in Settings then Domains and confirm HTTPS and the padlock after DNS propagates.
 - Run Google PageSpeed Insights and the theme speed report; compress heavy images and remove unused apps.
 - Set SEO titles, meta descriptions, and a favicon; add Google Analytics 4 and submit the sitemap to Search Console.
 - Place a final real test order, proofread every page, and click every menu item, button, and link on desktop and mobile.
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Exercise: Set Up Your Post-Launch Optimization Habit

Establish the weekly routine that compounds into real revenue gains after launch.

- Open Shopify Analytics and record your baseline: sessions, conversion rate, average order value, and abandonment.
 - Identify the single biggest drop-off (often the product page or a checkout step).
 - Make one change to address it and let it gather enough orders before judging.
 - Refine abandoned-cart emails and log each change and its effect so wins compound.
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Checklist: Go-Live and Optimization Ready

- Three to five apps installed, configured, and each justified by revenue or time saved
- Storefront speed re-checked after each app install
- Custom domain connected with HTTPS and the padlock confirmed
- Paid plan selected and storefront password removed in Online Store Preferences
- Final real test order placed: payment, tax, shipping, and email confirmed
- Every page proofread; all links, buttons, and navigation tested on desktop and mobile
- SEO titles, meta descriptions, and favicon set; GA4 and Search Console sitemap connected
- Weekly 20-minute analytics review scheduled with a change log started

Your Action Plan

1. Define what you sell, your buyer, and your primary CTA, then start the Shopify trial and choose Basic with Shopify Payments.
2. Pick the Dawn theme, set logo, two fonts, and color schemes, and learn to add and reorder sections.
3. Build the main and footer menus and generate and tailor your Refund, Privacy, Terms, and Shipping policies.
4. Add products with lean variants, optimized images, accurate weights, SKUs, and inventory tracking.
5. Write benefit-led descriptions, tag products consistently, and create automated and manual collections.
6. Build a converting product page: essentials above the fold, reviews, trust badges, honest urgency, and Shop Pay.
7. Enable Shopify Payments, Shop Pay, and wallets, allow guest checkout, and turn on abandoned-cart recovery.
8. Configure taxes and store details, then set shipping zones, profiles, and a free-shipping threshold above your average order value.
9. Install a lean three-to-five app stack (reviews, email, upsell), re-checking storefront speed after each install.
10. Connect a custom domain, run the full pre-launch checklist with a real test order, remove the password, and start a weekly optimization review.

