

# BEGINNER'S GUIDE TO



# *shopify*

# INTRODUCTION

Shopify has become a cornerstone for product-based tourism businesses, facilitating seamless online operations and customer engagement.

Shopify is particularly well-suited for businesses in the tourism industry that thrive on visual appeal and unique experiences. Companies offering travel-related products such as souvenirs, outdoor gear, or local artisanal goods can effectively utilize Shopify's customizable templates to create visually stunning online storefronts that reflect the essence of their brand and destination. Moreover, Shopify's seamless integration with various marketing tools enables businesses to reach a broader audience and drive sales through targeted campaigns. Compared to other e-commerce platforms, Shopify stands out for its intuitive interface, scalability, and extensive ecosystem of apps and integrations tailored to the needs of tourism businesses. Whether it's managing inventory, processing transactions, or optimizing for mobile devices, Shopify offers a comprehensive solution that empowers tourism businesses to thrive in the digital landscape.



# TABLE OF CONTENTS

**Introduction to Shopify..... 3**

**Finding Reports..... 4-8**

**Categorizing Products..... 9**

**Updating the Announcement Bar..... 10**

**Processing Refunds..... 11-12**

**Calculating Shipping with  
Canada Post..... 13**

**Shortcuts..... 14**

**Alt Text..... 15-17**

# INTRODUCTION TO SHOPIFY

## What is Shopify?

Shopify is an online platform that allows you to create and manage your own e-commerce store. It provides tools to build a website, add products, process orders, and handle payments, all without the need for coding skills.

## Navigating the Dashboard

### *Dashboard Layout*

The Dashboard is your central hub for managing your store. It displays key information such as sales, orders, and traffic analytics.

### *Sidebar Navigation*

Use the sidebar to access different sections:

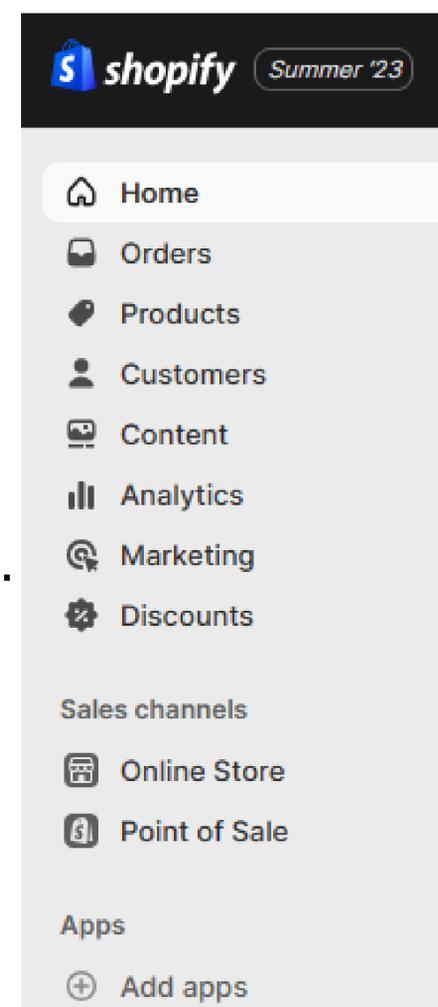
Orders: Manage customer orders and refunds.

Products: Add, edit, and organize your products.

Customers: View and manage customer information.

Analytics: Access reports on store performance.

Online Store: Customize your store's appearance.



# FINDING REPORTS

Reporting in Shopify helps you gain insights into your store's performance, customer behavior, and sales trends. Understanding how to access and interpret reports is crucial for making informed decisions to grow your business.

## Monthly and Quarterly Reports

### 1. Login to Your Shopify Dashboard:

Sign in to your Shopify account and navigate to the main dashboard.

### 2. Access Analytics:

Click on "Analytics" in the left sidebar. This is where you'll find various reports that provide insights into different aspects of your store's performance.

### 3. Sales Overview:

The "Overview" section presents an overview of your store's performance, including sales trends, order numbers, average order value, and more. Use this to understand how your store is performing at a glance.

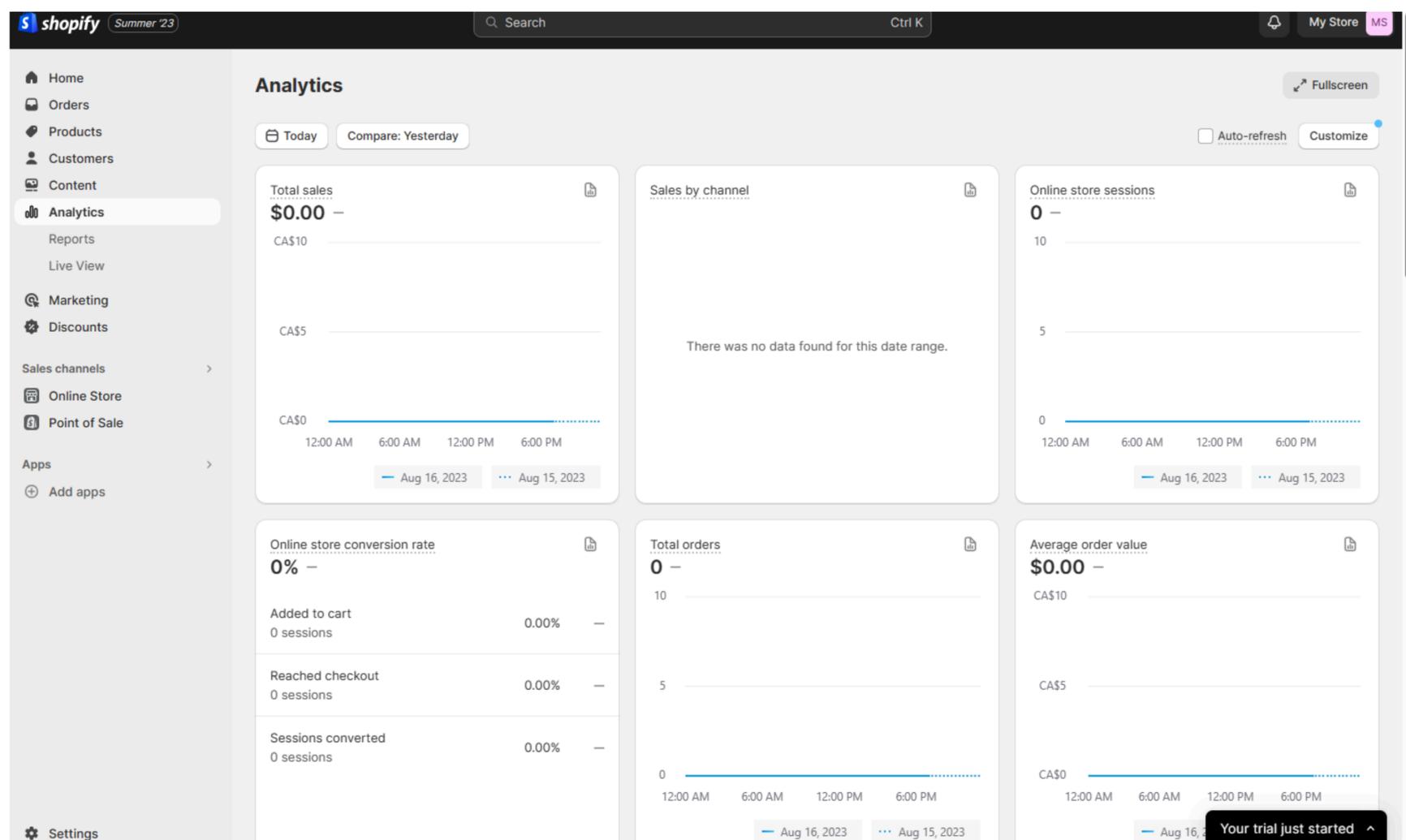
# FINDING REPORTS

## 4. Traffic and Conversion Reports:

Navigate to "Reports" and select "Sales over time" to see how your sales have evolved. Similarly, "Traffic over time" shows your store's traffic trends. Analyze conversion rates to understand how effective your store is at turning visitors into buyers.

## 5. Product Reports:

Click on "Products" to access detailed reports about your products. You can see which products are performing best, analyze inventory levels, and identify products that may need additional promotion.



# FINDING REPORTS

## Searching for Specific Orders

### 1. Access the Orders Section:

Click on "Orders" in the left sidebar. This is where you can manage and process customer orders.

### 2. Search Filters:

Use the search bar to find specific orders based on criteria such as order number, customer name, date range, or product.

### 3. Filter by Status:

Filter orders by their status, such as paid, fulfilled, or refunded, to streamline your order management process.

### 4. Individual Order Details:

Click on an order to access detailed information, including customer contact details, order items, and payment information.

### 5. Refund and Return Details:

If needed, you can process refunds directly from the order details page by clicking "Refund". You can also manage order fulfillment, shipping, and tracking information from here.

### 6. Order Export:

You can export order details to a CSV file, which can be helpful for further analysis or accounting purposes.

# FINDING REPORTS

## Analyzing Reports for Insights

1. **Understand Trends:** Regularly review your sales and traffic reports to identify patterns and trends. This can help you adjust your strategies accordingly.
2. **Identify Top Performers:** Pay attention to your best-selling products and capitalize on their popularity by promoting them further.
3. **Conversion Rates:** Analyze conversion rates to see how effective your store is in converting visitors into buyers. If rates are low, consider optimizing your product descriptions and checkout process.
4. **Customer Behavior:** Reports can reveal information about customer preferences, popular search terms, and referral sources. Use this data to tailor your marketing efforts.
5. **Inventory Management:** Monitor product reports to ensure that you have enough stock for popular items and consider discounting slow-moving products.
6. **Seasonal Trends:** Keep an eye on quarterly reports to understand how seasonality affects your sales and adjust your marketing campaigns accordingly.

# CATEGORIZING REPORTS

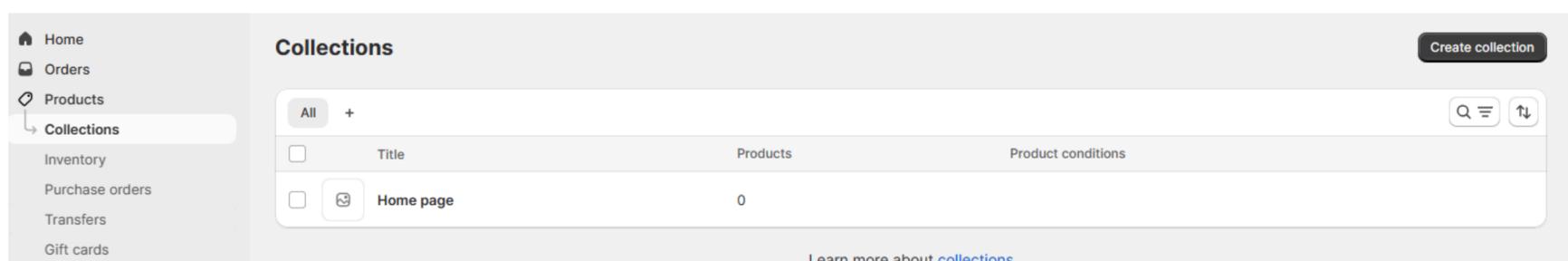
## Adding New Products to Your Store

In the Dashboard:

- go to "Products".
- Click "Add product".
- Fill in details like title, description, and price.
- Upload images.
- Set inventory quantities.

## Organizing Products into Collections

- Create collections like "Apparel" or "Electronics".
- Assign products to relevant collections during product creation.



# UPDATING THE ANNOUNCEMENT BAR

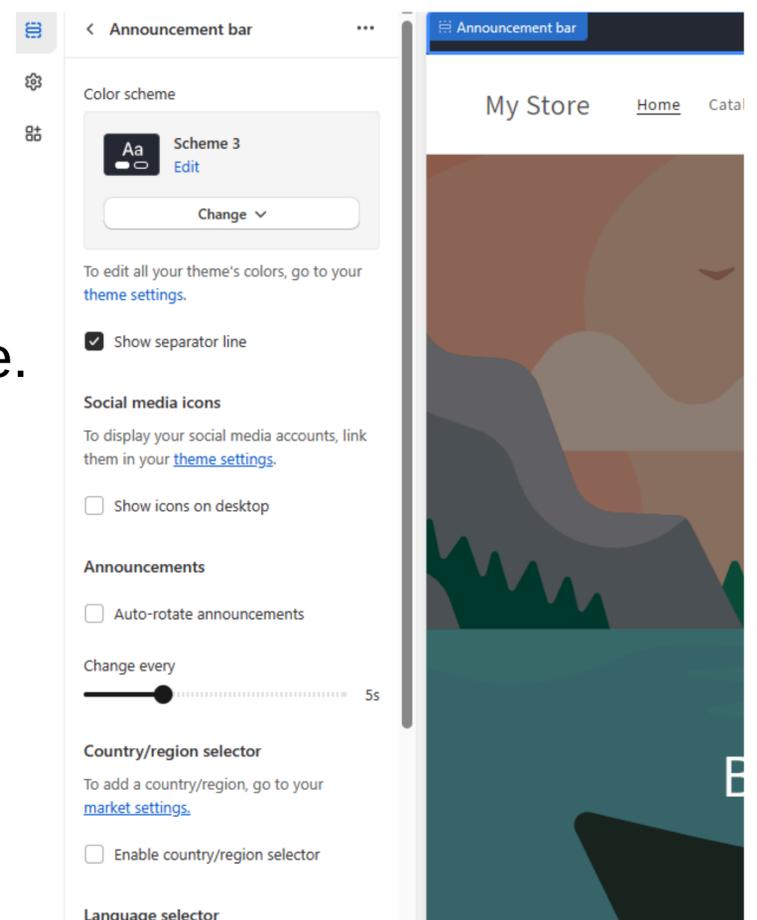
## Adding Important Messages or Offers

In the Dashboard:

- Go to "Online Store" and then "Themes".
- Click "Customize" for your theme.
- Find "Announcement Bar" in customization options.
- Enter your message or link, then save changes.

## Customizing the Announcement Bar Appearance

- Adjust font.
- Adjust color.
- Position to match your store's style.



# PROCESSING REFUNDS

## Step 1: Access the Order

- Log in to your Shopify account.
- From the dashboard, navigate to "Orders" in the sidebar.

## Step 2: Select the Order

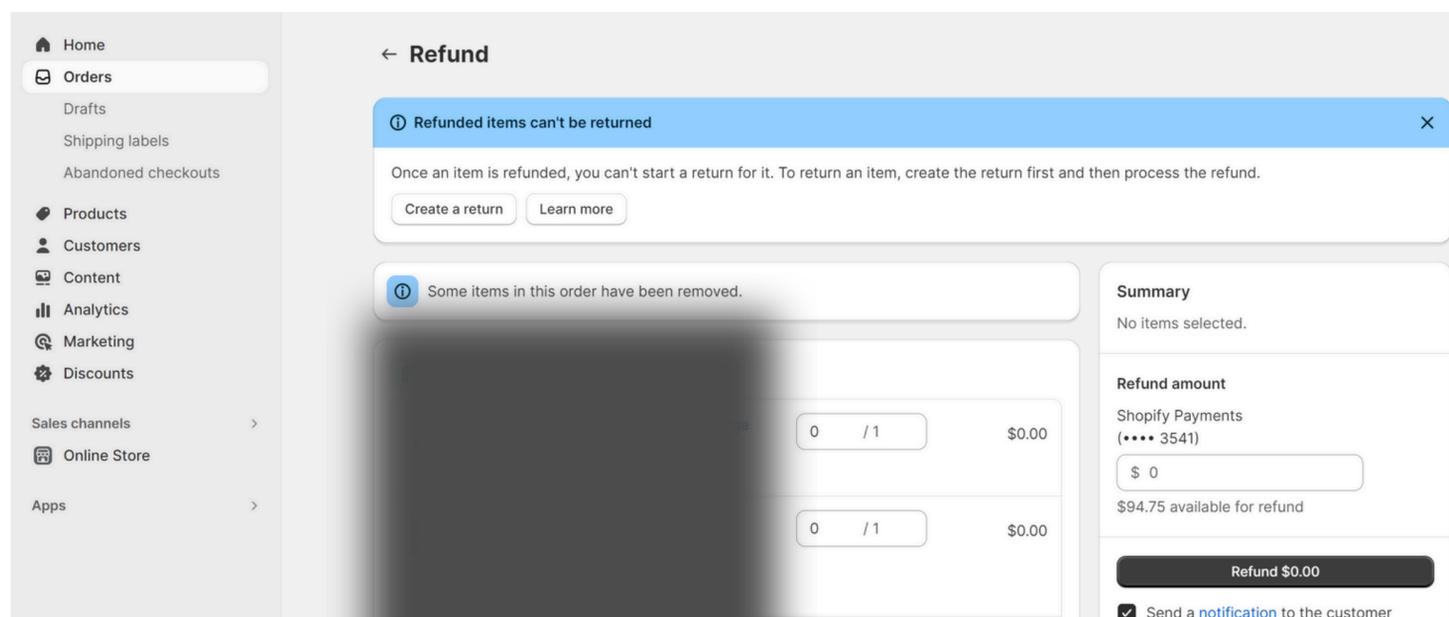
- In the "Orders" section, locate and click on the order for which you want to issue a refund.

## Step 3: Select Refund

- Once you're in the order details, you will be able to highlight one or all items you would like to refund.
- Once the items are selected click "Refund \$x.xx" and the refund will be processed.

## Step 4: Partial Refund

- *Follow steps 1-3. Once in the order details do not select any items on the order.*
- Just type in the \$ amount you wish to refund in the \$ 0 tab.



# PROCESSING REFUNDS

## *Step 5: Choose Refund Method*

- Select the refund method:
- Refund to original payment method: This refunds the full amount back to the customer's original payment source.
- Refund to a gift card: This generates a gift card for the refunded amount.

## *Step 6: Add a Refund Note (Optional)*

- You can add a note to explain the reason for the refund.

*This note is helpful for your records and can be seen by both you and the customer.*

## *Step 7: Notify the Customer*

- After processing the refund, communicate the refund details to the customer.
- Send an email notifying them that the refund has been issued.

# CALCULATING SHIPPING WITH CANADA POST

## Setting Up Shipping Profiles

In the Dashboard:

- Go to "Settings".
- Then "Shipping and delivery".
- Click "Manage rates".
- Add a shipping profile.

## Using Carrier Calculated Shipping Rates

- Choose "Canada Post" as carrier.
- Set up package details.
- Shipping costs will be calculated during checkout.
- Generate shipping labels for orders.

# SHORTCUTS

You can use keyboard shortcuts in your Shopify admin to quickly move between pages or add items such as products, pages, and discounts.

You can view a full list of keyboard shortcuts that work in Shopify from your admin. To open the list of keyboard shortcuts, press the ? key while browsing your Shopify admin.

To close the list of shortcuts, press the esc key. Keyboard shortcuts will work whether the list is open or not. You can also close the list of shortcuts by clicking anywhere in the Shopify admin panel outside of the popup window.

Most keyboard shortcuts require you to press multiple keys. To make sure that the keyboard shortcuts work properly:

- The keys for the shortcut must be pressed in the order they appear in the list from left to right. For example, if you want to add a product (shortcut A P), typing P A will not work.
- The complete sequence of keys must be typed within about 1 second.

# ALT TEXT

Adding alt text (alternative text) to images on your Shopify store is crucial for both accessibility and search engine optimization (SEO). Alt text provides a textual description of images for users who can't see them and helps search engines understand the content of your images. Here's a step-by-step guide on how to add alt text to images on Shopify:

## Step 1: Log In to Your Shopify Account

- Open your preferred web browser and go to the Shopify login page ([www.shopify.com](https://www.shopify.com)).
- Log in using your email and password.

## Step 2: Access the Product or Image

From the Shopify dashboard, click on "Products" if you want to add alt text to a product image.

## Step 3: Add or Edit an Image for Product Images:

- Locate the product to which you want to add alt text.
- Click on the product to edit it.

# ALT TEXT

## Step 4: Add Alt Text

- In the product editor, find the section that allows you to upload or edit images.
- Click on uploaded image and you will see "edit alt text on the right hand side".

## Step 5: Enter Descriptive Alt Text

- In the "Alt text" field, provide a concise and accurate description of the image.
- Describe the content and purpose of the image, including any relevant details that a visually impaired user should know.

## Step 6: Save Changes

- After adding the alt text, make sure to save your changes. Look for a "Save" button.

## Step 7: Repeat for Other Images (If Needed)

- If you have multiple images, repeat the process for each one to ensure all your images are properly described.

## Step 8: Publish Your Changes

- Once you've added alt text to all the necessary images, click the "Save" or "Publish" button to make your changes live on your Shopify store.

# ALT TEXT

## Best Practices for Writing Alt Text:

- Be Descriptive: Describe the image's content, context, and function.
- Conciseness: Keep alt text concise but informative.
- Keywords: If relevant, include keywords that relate to the image and your product.
- Avoid Keyword Stuffing: Don't overuse keywords; focus on providing an accurate description.
- Unique Descriptions: If you have similar images, ensure each alt text is unique and accurately reflects the differences.

## Example Alt Text Scenarios

- Product Image: "Blue women's sneakers with white laces"
- Infographic: "Graphic showing sales growth over time"
- Complex Image: "Group of people at outdoor event, smiling and socializing"

By adding descriptive and well-crafted alt text to your images, you'll not only improve the accessibility of your website but also contribute to better SEO rankings, making your products more discoverable by search engines and potential customers alike.