



EXPAND 2021

# WooCommerce Setup Checklist

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# Checklist for starting a WooCommerce store

One of the best things about WooCommerce is how customizable it is—you can tweak *everything* to make a store exactly how you want it. But that also presents a challenge: When you're starting a new store and staring at the blank canvas that is WooCommerce, it can be tough to figure out (or, if you've done this before, remember) what to do first. Or second. Or 114th.

We put together this checklist to help you go from a WooCommerce install that's so fresh and so clean (clean) to a fully functioning store ready to sell to customers to customers.

## Phase 0: Getting set up on a hosting platform

- Purchase your domain name
- Purchase a web hosting plan
- Follow the initial WooCommerce setup steps at your web host. (For example, with [GoDaddy's Managed WordPress Ecommerce](#) plan, you either pick a theme or migrate over another site, then specify the store's geographic location, and WooCommerce is set up.)
- Activate your SSL certificate. This may come with your hosting plan; if it doesn't, you'll need to purchase one in order to have secure transactions on the site.

## Phase 1: Theme and settings

The first step in setting up a store is getting the visuals and basic settings taken care of. You should also install at least one payment gateway at this stage, as those are fundamental to accepting money from customers.

### Appearance menu

- Install or activate a theme in **Themes**.
- Make any customizations to the theme (e.g., site title and logo, colors, etc.).

### Settings menu

- Update all **General** settings as needed, making sure the site and store URLs use https.
- Adjust **Writing**, **Reading**, and **Discussion** settings based on the blogging plans for the site.
- Set up **Permalinks** with the link structure you want.
- Upload your privacy policy in the **Privacy** settings.
- This is also a good time to add the store's return policy and terms and conditions as pages in the **Pages** menu.

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## Install payment gateways

- ❑ Install the payment gateways you plan to use in the WooCommerce Extensions menu (e.g., [Stripe](#), [Authorize.Net](#), etc.).
- ❑ Activate and set up those payment gateways.

## Install shipping methods

- ❑ Install the extensions for any shipping methods (e.g., [USPS](#), [Royal Mail](#)) you plan to use for the site.

## WooCommerce Settings menu

- ❑ Update all **General** settings as needed.
  - ❑ *Store Address* should match the main location of the business.
  - ❑ General options (e.g., shipping locations, enabling tax rates, and enabling coupon codes) will vary based on the nature of the business.
  - ❑ *Currency options* should match the currency in the main location of the business.
- ❑ Update all **Products** settings (General | Inventory | Downloadable products) as needed.
  - ❑ Replace the *Placeholder* image with the URL to a file in the media library if you want a custom picture to appear for products without photos.
  - ❑ We recommend enabling reviews and product ratings, as studies have shown reviews can make a significant difference in customer purchase decisions.
  - ❑ If you plan to manage stock on WooCommerce, make sure to fill in all the *Inventory* settings.
  - ❑ If you plan to offer downloadable products, make sure to fill in all the *Downloadable* products settings.
- ❑ Update **Shipping** options (Shipping zones | Shipping options | Shipping classes) as needed. (Note: If you've set up shipping methods, most of these steps will be automatically filled in for you.)
  - ❑ It's good to set up at least one domestic shipping zone and one international zone (if you plan to ship to other countries). You can also set up a local zone if you plan to offer pickups.
  - ❑ Set up *Shipping options*. We do not recommend hiding shipping costs until an address is entered, as a surprise cost can lead to cart abandonment.
  - ❑ If you plan to offer different *Shipping classes* (e.g., flat rate, bulky, etc.), fill those in.
- ❑ Update **Accounts & Privacy** options as needed.
  - ❑ We recommend allowing customers to place orders without an account, as well as allowing customers to create an account during checkout.

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- Set up Emails.
  - While we recommend using a third-party email service provider, it's a good idea to set up the initial transactional emails through WooCommerce to start.
- Update **Advanced** options (Page setup | REST API | Webhooks | Legacy API | WooCommerce.com) as needed.
  - If you're looking to use anything other than the defaults, customize *Page setup*, *Checkout endpoints*, and *Account endpoints* settings.
  - If you need an API key or Webhooks for any extensions, set them up here.

## Phase 2: Products

Now that all of the basic settings are taken care of, it's time to add products to the store.

- **Install SEO extension**
  - Install your go-to SEO extension (e.g., [Yoast](#)) in the **Plugins** menu.
- **Set up categories and tags**
  - Add categories in the **Products > Categories** menu.
  - Fill in all details for each category, including an image.  
If you plan to use tags, set them up in the **Products > Tags** menu.
- **Import the products**
  - If you plan to import products from a CSV, go to **Products > All Products** and choose *Start Import*. (If you have a large catalog or complex data, you may want to use an extension like [Product CSV Import Suite](#).)
  - Note: You may need to fine-tune some specifics for the products you import (like SEO settings and *Linked Products*) in the steps in the **Add the products** section below.
- **Add the products**
  - Choose **Products > Add New** to add a product.
  - Enter *Product name*.
  - Enter *Product description*. (And scroll down and fill in the *Product short description*.)
  - Enter SEO information, at a minimum SEO title and meta description.

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- Enter information into the *Product data* box.
  - Choose *Product type* and *Virtual* or *Downloadable* as applicable.
  - In *General*, set the price (and optional sale price and dates).
  - In *Inventory*, set the SKU and, if you're managing stock, add stock numbers.
  - In *Shipping*, set weights and dimensions. Use any shipping classes you set up earlier here, as applicable.
  - Set up basic upselling and cross-selling in *Linked Products*. (We recommend extensions to do more robust upselling and cross-selling in Phase 3 below.)
  - In *Advanced*, set up a purchase note if applicable, menu order if you want to customize the order, and select whether or not to enable reviews. (You can override your enable/disable reviews selection from the *Products* settings on a per-product level here.)
  
- **Add coupons**
  - In *Marketing > Coupons*, set up any initial coupon codes plan to use for the store.

## Phase 3: Initial extensions

The initial extensions you install will vary based on business needs, however, these are the fundamental types of extensions you'll most likely want to use from day one.

### Security extensions

*Note: These functions may come with your hosting plan without requiring extensions.*

- Install a security extension to protect the site from malware, spam, and other attacks.
- Install a backups extension to keep the store data protected in the event of a hack or crash.
- If you plan to use the [Jetpack](#) extension for security (and more), install it now.

### Performance extensions

*Note: These functions may come with your hosting plan without requiring extensions.*

- Install a content delivery network (CDN) extension to speed up the site based on a customer's location.
- Install a caching extension to improve site performance and lower server load.

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## Taxes

- If you plan to use an extension for tax calculation and collection, install it now.

## Email marketing platform

- Install the extension for your email marketing platform of choice and link that platform to the WooCommerce site.
- Either install an extension to collect email addresses (e.g., via pop-up or embedded forms), or implement the forms from the email marketing platform.

## Other really helpful initial extensions

- [WooCommerce Social Login](#) speeds up the account creation/login process by allowing customers to use logins from popular social media platforms.
- [WooCommerce Product Reviews Pro](#) replaces the default WooCommerce reviews with more advanced options.
- [Google Analytics](#) is crucial for site metrics; upgrade to [WooCommerce Google Analytics Pro](#) for deep eCommerce insights.
- [Checkout Add-ons](#) and [Cart Add-ons](#) for upsells and cross-sells, respectively.
- [Multichannel for WooCommerce](#) allows you to set up listings on Google, Amazon, Walmart, and eBay.

## Phase 4: Final setup and testing

It's time to see how the site performs.

### Final setup steps

- Set up menus in the Appearance > Menus and widgets in Appearance > Widgets.
- Take care of any other design customizations.

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## Test the site

- ☐ Test the site in an incognito window (to avoid caching).
  - ☐ Click around to make sure all links are functional.
  - ☐ Make sure the product, category, and tag pages all look correct.
  - ☐ Add products to your cart.
  - ☐ Go through the checkout process.
  - ☐ Buy a product from the store to test payments, tax, and shipping methods.
- ☐ Test the site on other browsers, on mobile, and in other locations to check speed and performance.

## Phase 5: Launch!

*Ready to get started? Check out GoDaddy's Managed WordPress Ecommerce plan, which includes virtually all of the premium extensions mentioned in this checklist (and more)!*

[Learn More →](#)

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