Let's Help You
Move to Shopify POS

Your POS Migration Care Package

shopify

Hello!

Thank you so much for your interest in Shopify. We want to make the experience of migrating your business as easy as possible.

In this POS migration care package, we'll break down the necessary steps, share resources, and provide tips to help you get your business up and running on Shopify.

01 Let's Focus On Migrating To Shopify POS

Getting started with your store migration

This guide outlines how to migrate your Point of Sale platform data to Shopify. You can use it as a resource to ensure you don't forget any key setup tasks.

If you are an existing Shopify Plus member or are migrating your POS to a new Shopify Plus plan, learn more about the **migration processes and services** that are available.

Included in this document:

Step 1: Configure your basic administrative settings
Step 2: Decide what data to import to Shopify
Step 3: Import data to Shopify
Step 4: Organize your products after migration
Step 5: Get comfortable with Shopify POS

Step 1

Configure your basic administrative settings

Before you start adding products and setting up your payments, there are a few administrative tasks that you should do:

- Complete the initial setup so that your store address, email address, and other store settings are up to date. If you plan to sell only in-person, you can skip some of the online store related tasks
- Know where to manage your account and access your billing information
- Setup your locations to fulfil orders and track inventory
- Add staff accounts so that each of your staff members has a personal login account and all sensitive account information remains secure

Step 2

Decide what data to import to Shopify

When you migrate to Shopify, you'll need to migrate over your existing data, such as your products, customers, or orders. It's important to consider what data is absolutely necessary for you to run your business. Moving everything over will require more time and effort.

It can take a while to migrate your data, so start working on a plan as soon as possible. Evaluate your existing data and decide what needs to move over. List the types of data that you track in your old platform and estimate how many items you have to move over.

Step 3

Import data to Shopify

Next, you need to decide how you will migrate this data and in what order. Here are a few options that you can use to migrate your data:

- Use the Shopify **Store Importer app**. Supported platforms include Square, Shopkeep, and more
- Use existing migration apps from the **Shopify app store**
- Create (or hire a **partner** to create) an app that uses the Admin API
- Transfer **product**, **inventory**, and **customer** data manually using Shopify's CSV templates

The options that you choose depend on the amount of data that you need to move and the developer resources you have. Using an app is a great option, as the app will handle the heavy lifting of getting your data into Shopify. Then, you can tweak the details as you see fit.

We recommend starting with your products and inventory data first, and planning to move your customer data second. Following that, you may choose to migrate other data such as historical orders, gift cards, and discount codes.

If you follow this order, you will have access in Shopify to your customers' complete transaction history. The migrated orders will also be linked to their associated products and customers.

Here's a summary of the migration methods available by data type:

Data	Migration Options
Products	**Shopify app store**, **CSV file**, **Product API**
Inventory	**Shopify app store**, **CSV file**, **Inventory APIs**
Customers	**Shopify app store**, **CSV file**, **Customer API**
Historical orders	**Shopify app store**, **Order API**, **Transaction API**
Gift cards, certificates, and store credits	**Shopify app store**, **Gift Card API**

Step 4

Organize your products after migration

If you used a migration app to import your products to Shopify, then it's important to check that all of your product information was imported correctly.

To verify your products after migration:

1. **Check your product details**, which include product titles, descriptions, variants, prices, images, SKUs, barcodes, etc.
2. **Create a collection** to organize your products into categories and make them easier for your staff and customers to find
3. **Get familiar with product inventory** and **transfers** to keep track of the products that you have available to sell. **Inventory apps** like **Stocky** help with adjusting stock levels and creating purchase orders

Note: If you are selling **digital products or services**, then make sure you are familiar with the differences between digital and physical goods.
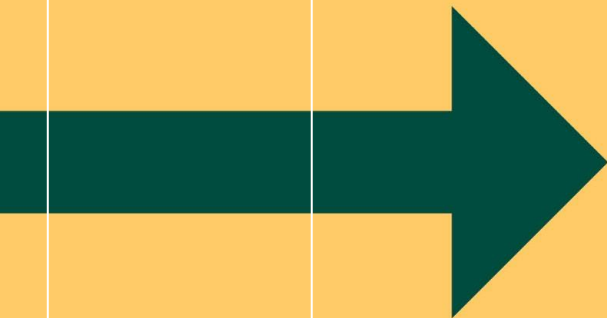
Step 5

Get comfortable with Shopify POS

Check out Shopify's **YouTube playlist for Shopify POS**. While some tasks have been covered in this package, the playlist goes into more detail around operational tasks like:

- Creating barcode labels
- Using the Shopify POS app
- Connecting to hardware
- Processing sales
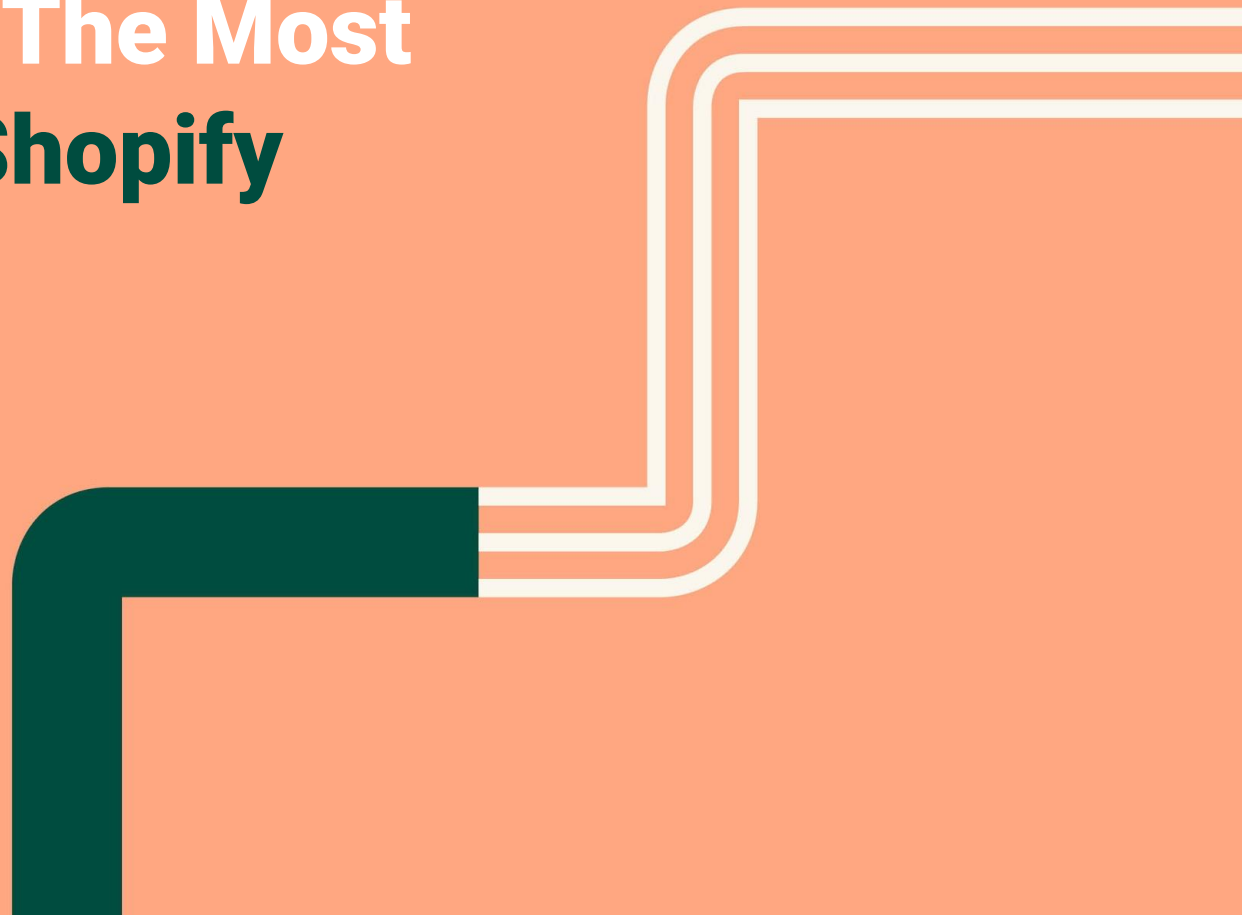- Processing returns & refunds

02

Setting up your
Online Store

If you plan to sell online, you'll need to set up your online store and configure its appearance. Here are some resources that can help:

❏ **Organize your online store**

❏ **Setting up pages for your online store**

❏ **Tips for migrating your existing online store**

❏ **The Essential Shopify Store Launch Checklist**

❏ **Place a test order**

❏ **Remove your online store password**

03

Getting The Most
Out of Shopify

- **Shopify Academy:** Free Shopify training to help you build and grow your business.

- **Shopify App Store:** A collection of free and premium plugins that extend the functionality of your online and brick and mortar store.

- **Shopify Masters:** The ecommerce marketing podcast for ambitious entrepreneurs.

- **Shopify Webinars:** Free sessions to help you run your Shopify store.

04

How Shopify Supports Your Business

- **<u>24/7 Support</u>**: Offered to every merchant, no matter what plan they are on.

- **<u>Help Docs</u>**: Resources that cover all subjects Shopify related.

- **<u>The Shopify Community</u>**: A discussion forums for business owners, partners, and experts, as well as those looking to learn more about Shopify.

- **<u>Ecommerce Blog</u>**: The place to learn everything from marketing techniques to SEO.

- **<u>Free eBooks and Guides</u>**: Resources that teach everything you need to know to run a successful online business.

- **<u>Shopify Experts</u>**: Lets you hire Shopify experts to help build your business. Experts are trusted, third-party agencies and freelancer.

We hope this POS migration care package will help you with your move to Shopify.

If you have additional questions feel free to reach out to **Shopify Support**!

You've got this.

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