



Cosmic Whispers Design

WooCommerce Setup Tutorial

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Keeping in Mind

Your vision for your business(es) and what you'd like to offer on your website.

Your loves

Write down the things you are passionate about doing.

Your offerings

Write down specific products or services you want to have in your online shop.

Payment Methods

Choose a Gateway

Paypal

Stripe

Square

You can also pick one in the setup wizard and change it later in the Settings for WooCommerce via the dashboard of your WordPress site.

Choose other methods

Cheque/Check

Bank draft

Cash on delivery

These options should come up in the setup wizard or can be found in the tabs in the Settings for WooCommerce so you can provide these options in your checkout process.

Run the Setup Wizard

- Store Setup: Physical location, types of products choices (digital and/or physical), selling products in person, usage tracking decision

- Payment gateway and other methods: Decide and provide email for gateway use. Paypal and Stripe included. Square requires extra plugin extension.
- Recommended connections to FB and Mailchimp. Also Automated Taxes calculation and Storefront theme if your site supports it. Uncheck the boxes for features you don't want to use.
- Connecting WooCommerce to the Jetpack plugin package is not required, but may be needed for some WooCommerce extensions later. If you aren't a Jetpack fan, you can opt out at this point.

WooCommerce will create Shop, My Account, Cart, and Checkout Process pages on your WP site. You can add them to menus but do not add anything else to the pages themselves as it may interfere with the display of default information.

Do check the view of each of these pages to see if the sidebar appears: You may or may not want that, and if not, you may need to change the layout for those specific pages or even make a global layout change in Customize.

Products Dashboard

All Products: List of products you've already created with options to edit.

Add New: Takes you to the product editor to add a new product

Categories: For when you have a lot of products that can be divided into categories (like Dresses, hats, jewelry, or if it's just a jewelry shop, rings, necklaces, bracelets, etc.)

Tags: Like the search tags you might use for blog posts. Not really necessary, but you can create them if you have product types or names you think people might look up directly.

Attributes: If most or all of your products have qualities that customers need to choose from, the basic types go here, like Color or Size (not the specific colors or sizes, but the categories of choices: Color, Size)

Add Products

Products are added in an interface that's modeled on the classic post or page editing layout, so it should look familiar if you've used a WP site before. You may not necessarily use all the elements you would use for a post or page, though. There are extra settings below the main editing screen.

- Product Title (in the space where a post or page title would go)
- Main editing box: Designed for a description that goes *under* the product image. Good for details about the product, but you can leave it blank. Do NOT add the product image here.

Product Data Section

This is where all the product information goes for customers to make decisions. Remember that there is always information on what a setting is if you hover over the question marks.

Dropdown list for product type: Simple, Grouped, External/Affiliate, Variable

The most used ones will be Simple and Variable. Each choice will create different options to go through.

- Simple just asks if the product is virtual (like a service) or a downloadable document. A physical product is the default. If you check virtual, Woo doesn't worry about shipping questions or data. If downloadable, options appear for you to name and link the downloadable item, which can be downloaded directly with WooCommerce during checkout. In all cases, you will have the option to set a regular and/or sale price, and for a sale price, the schedule for the sale's duration.
- Variable product is the one you would use if you have "variations," like different sizes or colors to choose from (see below).
- The items on the left side of the Product Data section work like this:
 - Inventory: The SKU is a unique number for the product. You can set up a system of your own for this, and it's a good idea for keeping track when you have lots of individual products. Fill in the other options based on how you want to manage stock. You can also just not choose Manage stock and take care of it yourself (just leave the In Stock option on), but if you have lots of items, letting Woo know what the stock is will mean that as soon as it runs out or gets close to running out, the system will let the customer know.
 - Shipping: You will need to fill out this information to ship products, and the shipping class setting will depend on what shipping carrier you use. WooCommerce Services, a premium plugin extension, provides more automatic options for shipping.
 - Linked Products: Just gives you the opportunity to list related products you'd like to highlight for the customer.
 - Attributes: You can choose from attributes you've set in the global list under WooCommerce in the left of the Dashboard, or make up custom ones for this one product.
 - Variations: For Variable Products, this is where you add the specifics under a given attribute, like the actual size options or color options. For each variation, there will be a little triangle arrow that will drop details for you to fill out, like a specific SKU variation for inventory, what type of product it is if not physical, regular and sale prices, weight and dimensions, stock quantity, and a specific description box.
 - Advanced: You can put a purchase note based on a customer phone call, for example, and decide what order the product will go in on the shop page, as well as enabling reviews

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Product Short Description

This looks like the box closer to the top where your description could go, but this one displays near the top of the product page, to the right of the product image. Depending on how your theme displays the product title or if you want a short version of the longer description that appears below the product, this is where you would put it.

Sidebar Items

Like regular posts and pages, there are options for saving a draft, publishing your product, sharing the launch with social media, scheduling the launch, etc. on the right sidebar.

You can set a product category here to keep all products in the same category together.

There's a tag section to add search tags that describe the product (try not to overdo these and make sure they are the two or three most important aspects).

You can opt to show sharing buttons for people to share your product on social media.

Product Image is where you choose the picture of the product that you want displayed. This way, all the images will be laid out and handled the same way and will show up on the Shop page also.

You can also add a gallery of multiple images (say, different perspectives on a t-shirt like front and back).

At the top of the sidebar, Save as Draft until you are ready, and then Publish or Schedule each product. They should all show up in the Shop after they are published.

Check Your Shop Display

Make sure to check both your main Shop page with all the products and the individual product pages to ensure all the information looks correct.

Test Product

Set up a test product that you publish as Private (so only logged in users, like you, can see it). It can be set to a cheap price (since the payment gateway will charge you their fee whenever you test all the way through).



Periodically “buy” the test product to make sure that the checkout process is working the way it is supposed to.

If you have specific questions or would like me to go through the process with you or check out an extension’s operations, just contact me at joanne@cwsitedesign.com.