Setting up an eCommerce store using WooCommerce



Housekeeping

- All the attendee mics are muted you can hear us but we cannot hear you
- This session is being recorded we will send you a link to the recording and a downloadable copy of the slides after the event
- If you have any questions please use the Q&A function to ask them we'll cover the questions at the end if we have time otherwise we will follow up with you individually



Who we are







Rachel Clinton



Agenda

- What is WooCommerce and is it suitable for your website?
- How to install WooCommerce on your site
 - A live demo of installing WooCommerce on a WordPress site from scratch
 - Understanding the pages that WooCommerce adds to your site
- Setting up your first product
 - Understanding different types of products
 - Populating all aspects of your product listing
 - Understanding product categories
 - What makes an effective product listing?
- Setting up your store
 - Formatting your Shop page
- Getting paid
 - Payment options in WooCommerce
 - Creating coupons for special offers
- Privacy and GDPR in WooCommerce





If anything isn't clear...

- Please ask a question!
- There is no such thing as a stupid question



About us

- Our focus is on helping small businesses take control of their own web presence
 - Help building websites
 - Help with aspects of marketing
- Other webinars
- Discounted sessions and special offers for webinar attendees details at the end of the webinar



What is WooCommerce?

- A relatively quick and easy way of plugging a shop into your WordPress site
- 75 million downloads of WooCommerce widely used and supported
- Many WordPress themes work with it and many WordPress developers understand it
- Core functionality is free:
 - No commission charged on sales
 - No restriction on number of orders or number of products
- You can sell all sorts of products physical products, services, downloadable products, subscriptions, bundles (although you'll need a paid plugin for some of these options)
- Over 400 plugins (both free and paid) to enhance functionality
- Most organisations will be able to do everything they want to do in the free version
- Alternative ecommerce products such as Shopify are sold as subscriptions and may also require you to set up a completely new website (e.g. Magneto, VisualSoft)



What can you do in WooCommerce?

- Create an online shop configured in a way that people will find familiar
- Set up pages for each of your products
- Categorize your products
- Cross-sell and up-sell
- Set up coupons to offer discounts
- Manage your stock levels
- Manage shipping rates
- Take payments via PayPal, Stripe, other gateways, plus cash, cheque, etc.
- Track orders and delivery
- Automatically send customer confirmation emails
- Enable customers to review your products



Is WooCommerce suitable for your website?

- WooCommerce gives you a fully featured e-commerce environment on your site
- Think about whether you need a fully featured store or whether you could sell your products with a simple PayPal link - this may be a good option if you only have a very few products
- Might be overengineered for giving away free products



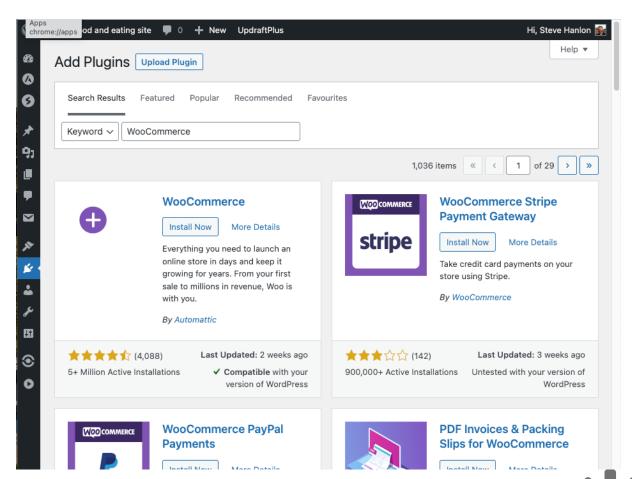
Installing WooCommerce

- Do not install WooCommerce on an existing site without doing some checks first!
 - Ideally you'd do this on a test copy of your website to check it works
 - At the very least you should take a backup of your site before you install WooCommerce for the first time
- WooCommerce says that it will work with any theme but some older or bespoke themes may need quite extensive styling
- The latest version of WooCommerce requires WordPress version 5.8 or higher and version 7.4 of PHP



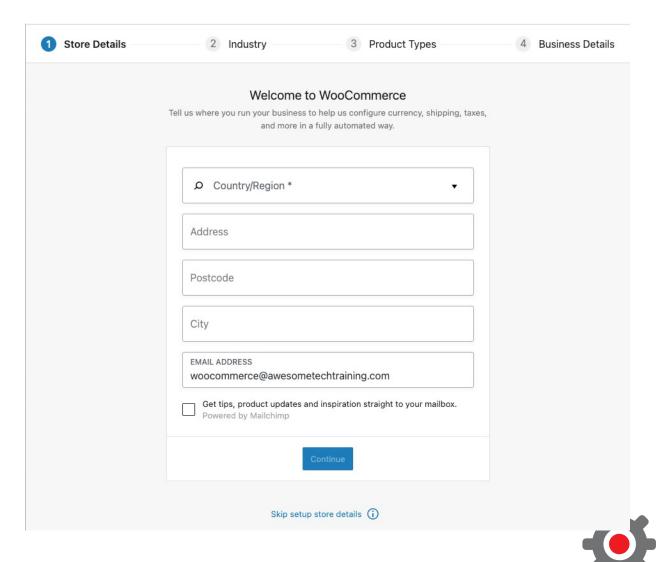
Installing WooCommerce

- WooCommerce is a free WordPress plugin
- In WordPress go to Plugins > Add New Plugin
- Search for WooCommerce
- There will be many options, but choose the first one: "WooCommerce" "By Automattic"
- Click "Install Now" and when the plugin is downloaded and unpacked, click "Activate"



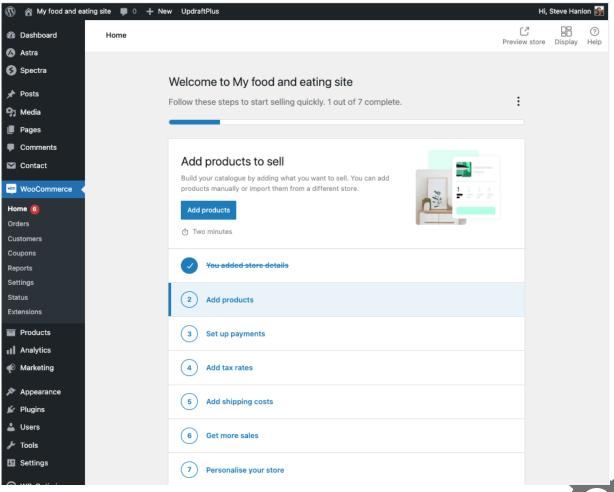
Setup Wizard

- Once installed, WooCommerce will prompt for details to help set up your store
- Some of these settings will help configure your store
- Some are used to understand how WooCommerce is being used
- And some steps will try to upsell you other paid options
- We recommend going through the steps and skipping the things you don't need



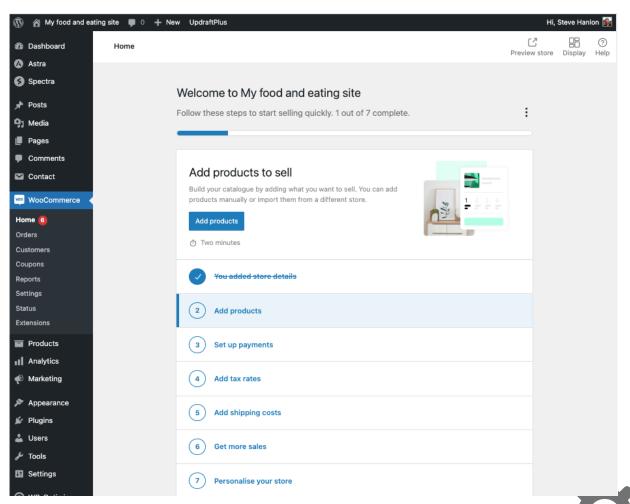
Steps after installing

- Once the business basics have been entered you can start configuring the key parts of your online store
- WooCommerce walks you through the steps
- Each step can be clicked on to complete the process



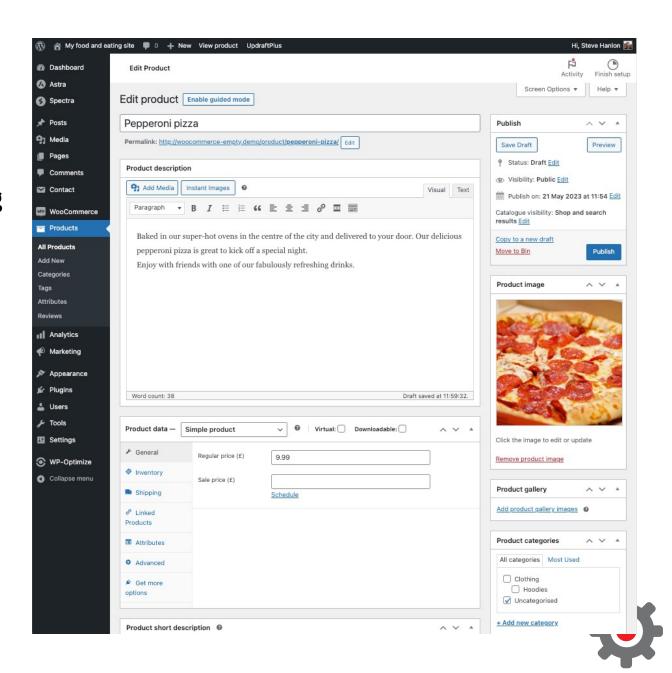
WooCommerce menu items

- You'll see on the left hand side that you have three extra menu items:
- The main WooCommerce menu shows your orders, customers and other settings
- The Products menu has links to manage products and categories
- Analytics provides reports for your store
- Marketing has links to marketing plugins and for setting up coupons



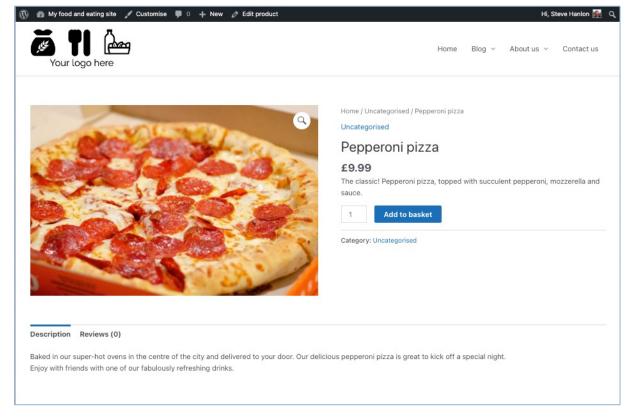
Add product

- There are four main areas when adding a new product
 - The product name
 - The description
 - The image
 - The price
- Other important sections include:
 - The short description
 - Product category



Previewing our first product

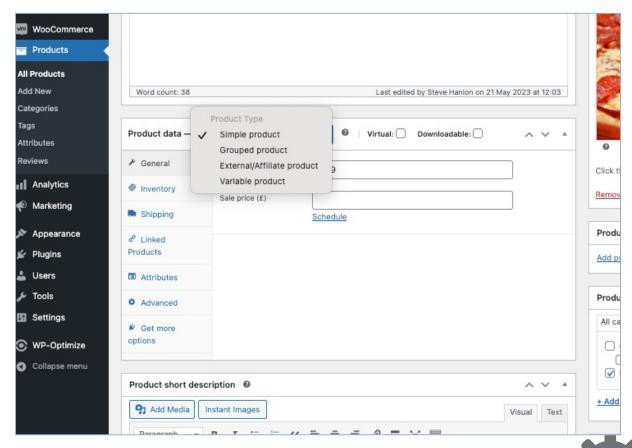
- This is the standard layout for a product when shown to your store customers
- The layout includes the product name, your short and long description, the price and the category
- If you have set up other attributes such as ingredients or variations then they would appear at the bottom alongside Description and Reviews
- You can manage the layout of this page in the WordPress customise area





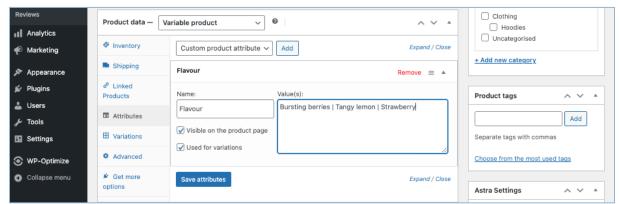
Product types

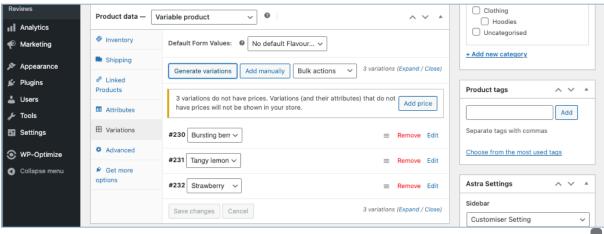
- Products can be defined as Simple, Grouped, External/Affiliate or variable
- Simple products just have a price (or sale price)
- Grouped products these are a collection of related products that are purchased individually
- External products these let you have a product page and a link to another site. For example affiliate products
- Variable products products with different variations. For example, size or weight



Adding a variable product

- In our example shop we can sell fizzy drinks as well as our pizzas
- We could add these as a variable product with different flavours
- This is done in two steps. In the product data section, first add the different flavour attributes and save
- Then under "variations" you add the variations to match the attributes. Click on "Generate variations" to save time
- The variations can be given different prices, descriptions and other attributes

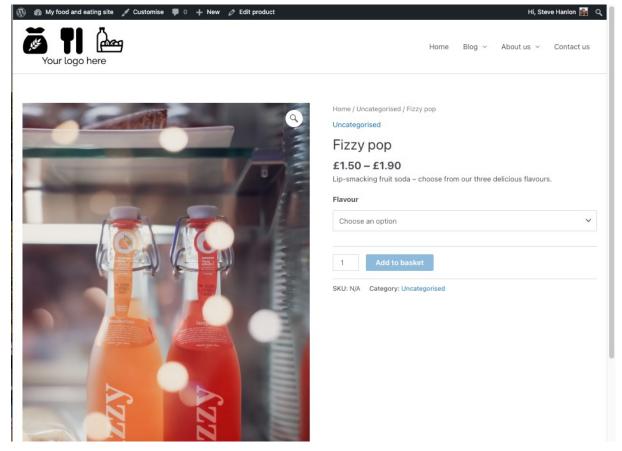






Adding a variable product

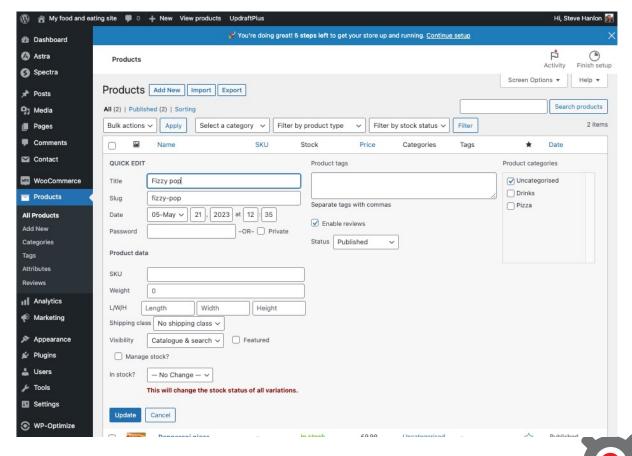
- On our product listing page we see that there is now a drop-down for the flavours available
- The price is shown as a range.
- Once a flavour is chosen, the corresponding price and other details are shown and the "Add to basket" button becomes active





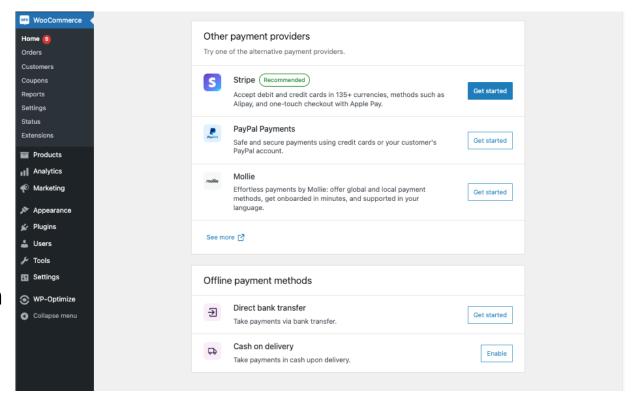
Setting product categories

- On the product listing page, you can either go into the product to change the categories, or you can use the "quick edit" method
- Quick edit lets you set some simple attributes of the product while staying on the listing page
- In this example, we can change the category from "uncategorised" to "drinks"



Taking payments

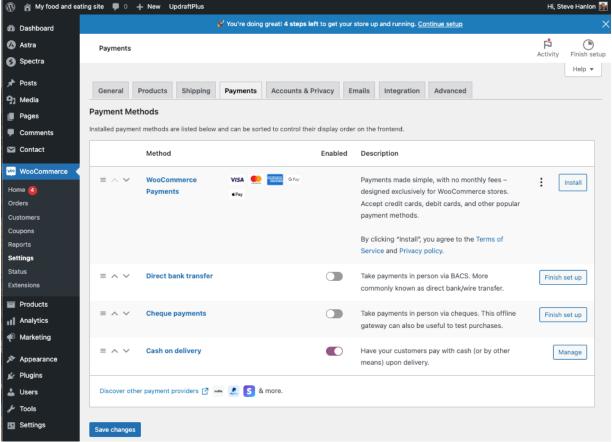
- Once we've added products we need to set up how we receive payments
- Clicking on the "Set up payments" wizard step takes us to a page where different payment options can be configured
- Plugins exist for different types of payment gateway, but Stripe and PayPal are both easily installed via the wizard
- You will need to configure an account with PayPal or Stripe if you want to use them
- In our example we click on the enable button by "Cash on delivery"





Payment settings

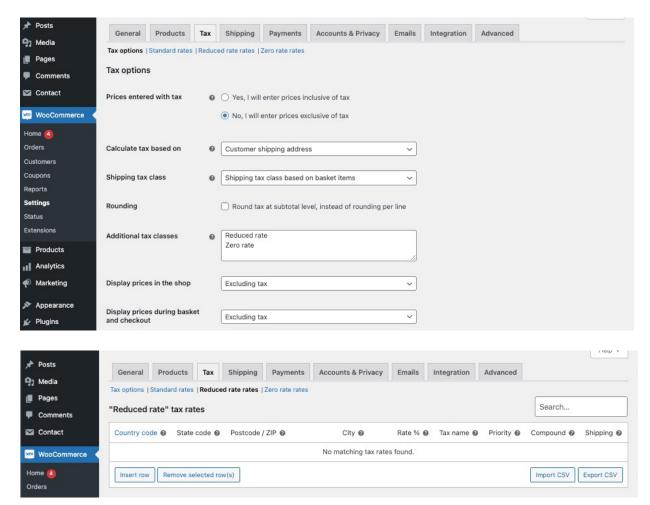
- Payment settings are found under the "WooCommerce -> Settings" menu option
- The Payments tab lists all installed payment options along with links to finish or manage the configuration of method
- Here just "Cash on delivery" is enabled
- You can re-order the payment options by using the three bars on the left to drag the options up and down





Sales tax

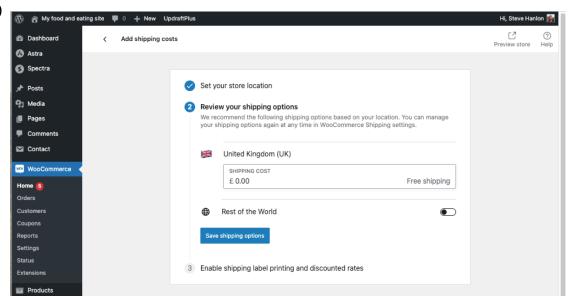
- WooCommerce has options for configuring sales tax
- In the setup wizard, you can choose to use the Jetpack plugin to calculate tax, the "Avalara" service, or you can configure manually
- The Jetpack plugin is the easiest way to know that you're charging the right amount
- However, if you don't charge tax or everything is a single rate then manual might be better for you

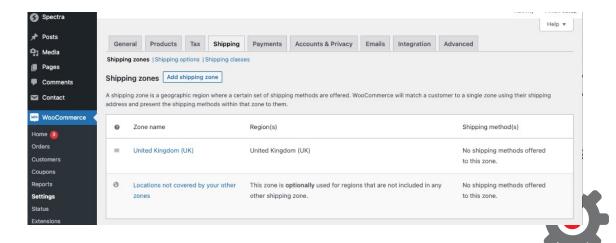




Shipping options

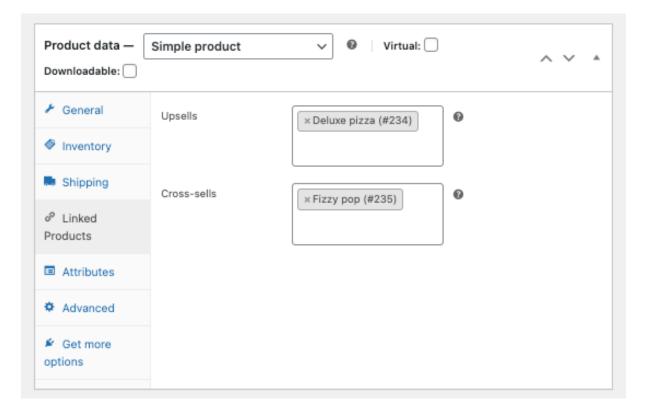
- If you charge for shipping, then you can configure these in the setup wizard and in the settings
- Shipping is defined by region, ie. where the product will be shipped to
- Within a region you can configure different methods of shipping. For example, free, standard and next day
- The wizard makes it easy to get started, but go to the "Shipping" tab in settings for more control





Cross selling and upselling

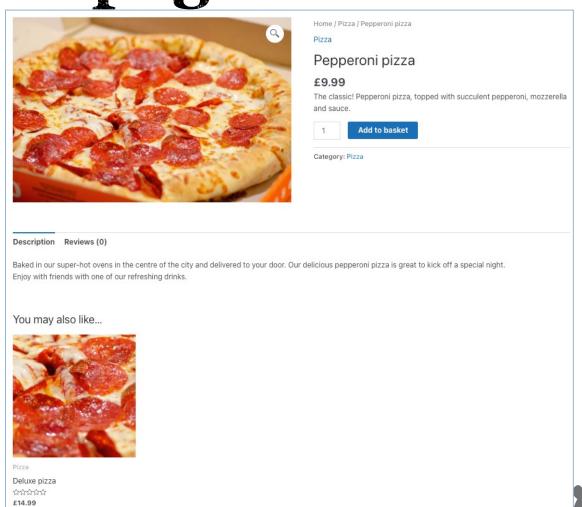
- Up-selling is when an alternative product is offered
- Cross-selling is where additional complementary products are offered
- These are configured for each product in the "Linked products" tab in the "Product Data" section
- In our pizza example offering a deluxe pizza might be an up-sell and the fizzy pop would be a cross-sell





Upsell on product page

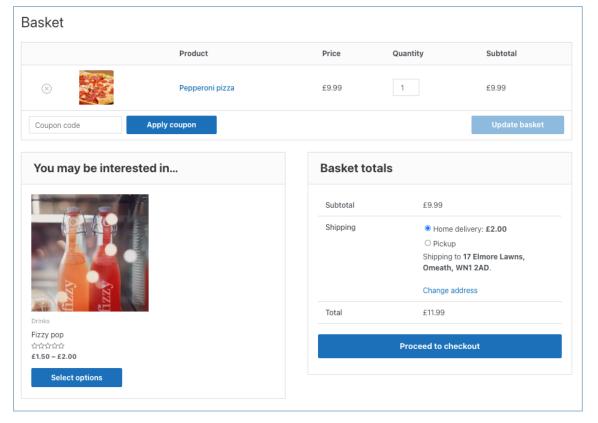
- When the product is offered as an upsell, it appears on the same page as the product
- In this example we are looking at the pepperoni pizza but we are offered a deluxe pizza
- If we hadn't defined some upsell products, then WooCommerce will show related products based on the product category



Add to basket

Cross-sell in basket

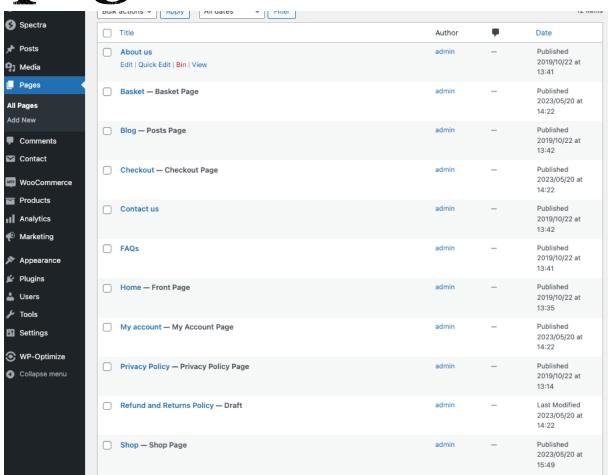
- Cross-sell products are shown to the customer when viewing the basket
- In our example here, we defined fizzy pop as a cross-sell for pizza
- In this case, clicking on "select options" takes the user to the page to choose the flavour
- A simple product will be added directly into the basket without changing the page





WooCommerce pages

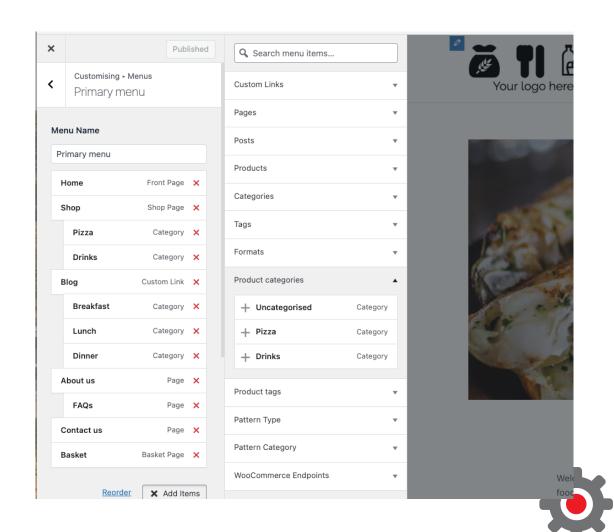
- WooCommerce adds some extra pages to your site for managing the store
- These are:
 - Basket
 - Checkout
 - My account
 - A draft Refund and Returns Policy page
- These pages can be tweaked by adding blocks before and after the woocommerce blocks
- To change the formatting of the blocks themselves, we still need to change the templates in our child theme - technical!





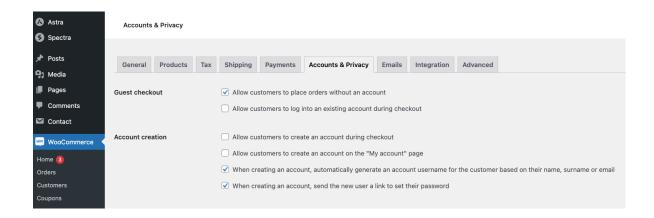
Adding the store to our site

- Our products, categories, basket and checkout are all pages and can be linked like other pages in WordPress
- For our example we add the store to our top menu
- In Customise -> Menus we find our primary menu and add our pages.
- The "Shop" page is found under "Pages" and our Pizza and Drinks categories are found under "Product categories"
- We can also add a link to the basket



GDPR, privacy and security

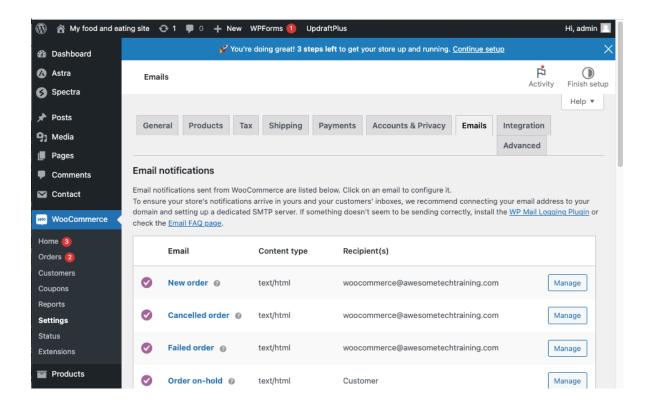
- Under Settings -> Accounts and Privacy you'll find options to manage the personal data in the store
- At the bottom of the page are the personal data retention settings
- It's important to review these and consider how long you should keep data and not keep it on your website longer than needed
- Also consider the security of your site.
 Make sure that WooCommerce is kept up to date so that it has the latest security patches



Coupons	Personal data retention	
Reports	Choose how long to retain personal data when it's no longer needed for processing. Leave the following options blank to retain this data indefinitely.	
Settings		
Status	Retain inactive accounts N/A Month(s)	
Extensions		
Products	Retain pending orders N/A Day(s)	
■■ Analytics		
♠ Marketing	Retain failed orders N/A Day(s)	
Appearance	Retain cancelled orders N/A Day(s)	
✓ Plugins		
🕹 Users	Retain completed orders N/A Month(s) Month(s)	
Settings	Save changes	

Emails

- Your customers will receive emails when orders are received and when they've been processed
- You will receive email notifications when an order is placed
- The wording of these emails can be edited in the settings
- If you want to change the look and feel of the messages then you can create templates and add them to your theme. That might be a job for a developer





Troubleshooting problems

- Sometimes things don't run smoothly
- Make sure that your site is regularly backed up and manually backup the site before trying to resolve problems
- If you can, copy the site to a staging area and try to fix the problems there first
- Most problems are due to plugin incompatibilities -make sure that you have the latest versions installed
- If you have custom templates (technical!) then these might cause problems after an update
- Shipping or payment problems double check all your payment gateway settings. Try
 using a sandbox for test transactions. Make sure that your shipping options cover all
 your possible combinations



Useful plugins

- Available via WooCommerce's website
- Free extensions
 - Integrate with payment providers
 - Live chat
 - Accommodation bookings
 - Shipping
- Paid extensions
 - Subscriptions \$199
 - Bookings \$249
 - Memberships \$199
 - Product addons e.g. giftwrapping / special messages \$49
 - Product bundles \$49



Next steps

- Build a one page website in an hour using the Astra theme free video guide
- Check out the free WordPress videos and other resources on our website
- Book some training with us for you / your team
 - Help with your existing site
 - Ask us anything about WordPress
 - Training and support to help you build your own site
- Take a look at our schedule of upcoming webinars





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