



## Setting Up Shop With Woocommerce

910.302.3286 // [contact@designloud.com](mailto:contact@designloud.com) // [www.DesignLoud.com](http://www.DesignLoud.com)

# Who Are We?

910.302.3286 // [contact@designloud.com](mailto:contact@designloud.com) // [www.DesignLoud.com](http://www.DesignLoud.com)

# An Agency Was Born

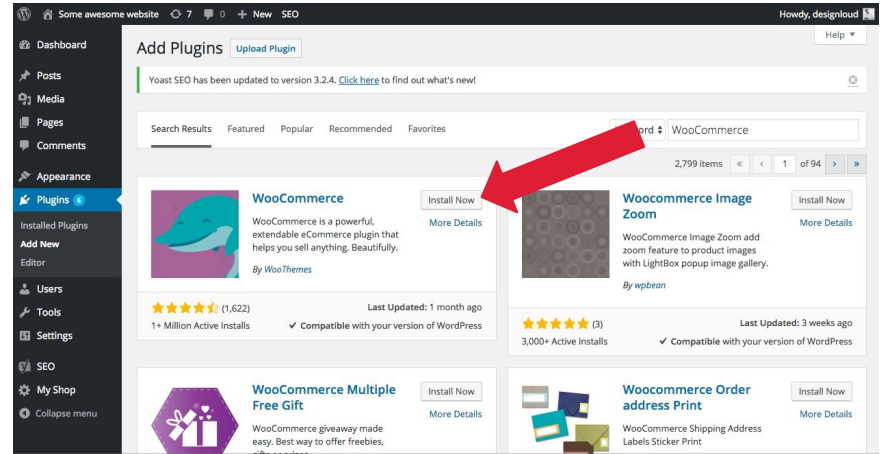
DesignLoud was founded in 2011 by Derek Schmidt. At the time of its inception Derek had been working with WordPress for more than a year and grew very fond of the platform because of how easy it was for his clients to make changes to their website and how scalable it was as a Content Management System. After working with several clients on eCommerce websites, Derek developed a passion for developing with WooCommerce, a popular eCommerce solution for WordPress. Fast forward several years later, Derek and his team have developed several custom eCommerce websites using WordPress and WooCommerce.

# Getting Started

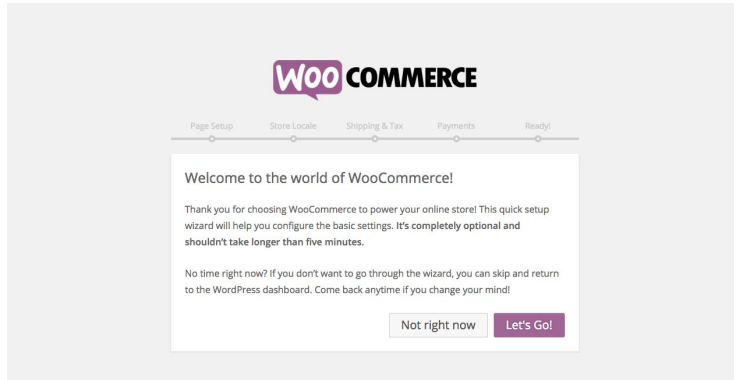
910.302.3286 // [contact@designloud.com](mailto:contact@designloud.com) // [www.DesignLoud.com](http://www.DesignLoud.com)

# Download and install WooCommerce

The first thing you will want to do is head over to the repository and download the free plugin WooCommerce. Simply log into your website and while on the dashboard go to Plugins > Add New and search for “WooCommerce”. Once you install WooCommerce go ahead and activate the plugin and follow the quick set-up guide. If you choose you can go ahead and skip the set-up guide as you can always modify the settings later on your installation.



# Using the quick setup



While using the quick setup you will be asked a series of questions about your store to help WooCommerce automatically configure your settings based on your shop. These questions will include where your store base is located (for shipping & tax calculations). It will ask you if you want to go ahead and set up tax rates based on your localities. It will also ask you if you would like to go ahead and set up shipping rates or if you would like to install a shipping plugin skip this.

# Setting Up Tax Rates (Manually)

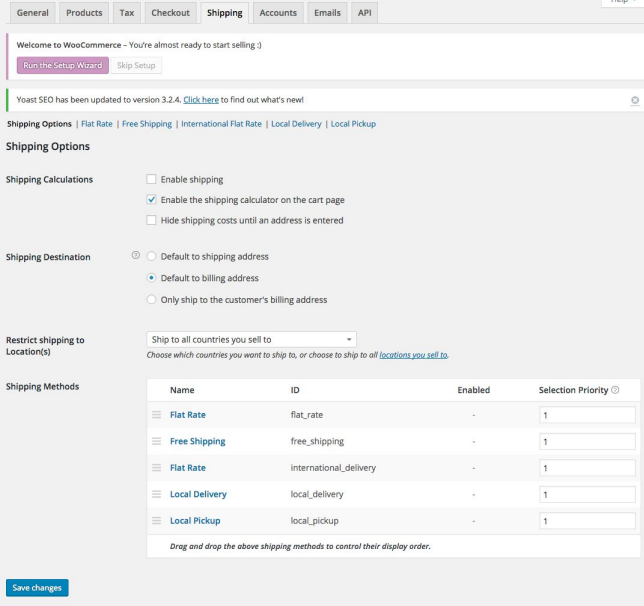
Tax rates are going to depend on where you live. The best place to start would be to go to your favorite search engine and search for your state's tax rates. Most of the time you'll find a combined tax rate for city tax and county tax, if you live within the United States. Generally this will be in some sort of table that you can easily copy and paste into a CSV file which can then be imported into WooCommerce. If you have questions about the format of the CSV WooCommerce provides a sample download on the tax section of WooCommerce settings.



*Example: A search for North Carolina Tax Rates would bring up a combined rate of 7.5%*

# Setting Up Shipping Options

In the WooCommerce settings you'll see a tab for shipping. Within the shipping settings you have various options for how you would like to handle shipping. These would include charging a flat rate within your country, international flat rates, free shipping, delivery options and pick up. Which ones you decide to use will depend on your shop and how you will manage shipping.



The screenshot shows the WooCommerce Shipping Options settings page. The top navigation bar includes tabs for General, Products, Tax, Checkout, Shipping, Accounts, Emails, and API. The main content area is titled "Shipping Options" and includes several sections:

- Shipping Calculations:** Includes checkboxes for "Enable shipping", "Enable the shipping calculator on the cart page" (checked), and "Hide shipping costs until an address is entered".
- Shipping Destination:** Includes radio buttons for "Default to shipping address", "Default to billing address" (selected), and "Only ship to the customer's billing address".
- Restrict shipping to Location(s):** A dropdown menu set to "Ship to all countries you sell to" with a note to "Choose which countries you want to ship to, or choose to ship to all [locations you sell to](#)".
- Shipping Methods:** A table listing various shipping methods with their IDs, enabled status, and selection priority.

Name	ID	Enabled	Selection Priority
Flat Rate	flat_rate	-	1
Free Shipping	free_shipping	-	1
Flat Rate	international_delivery	-	1
Local Delivery	local_delivery	-	1
Local Pickup	local_pickup	-	1

A "Save changes" button is located at the bottom left of the settings area.



# Using Shipping Extensions

There are a number of great extensions available on various commercial plugin websites. Some of the most popular services would of course be USPS, UPS, FedEx, and Shipstation just to name a few. When it comes to selecting the extension you will use for your website it's really going to depend on your preferred shipping method. These extensions generally grab real-time data from the appropriate vendor and generate the cost to the user in real time. The final cost can include some sort of handling fee which you can set in the settings of the plugin once installed and activated.

*Tip: Make sure to get organized in the very beginning and verify that your products always have the weight and the dimensions filled out.*

# Choosing your payment gateways

# PayPal

PayPal is one of the most recognized names as far as payment gateways are concerned. PayPal has different levels of options for merchants depending on your needs. The most commonly used option would of course be PayPal Standard. Which by default comes integrated with WooCommerce upon activating the WooCommerce plugin. If you do not have an SSL certificate on your website and you are using PayPal Standard your customers will be redirected to their checkout page once they are ready to check out and then redirected back to your website depending on whether they cancel or complete the checkout process.



# Stripe

Stripe, like WordPress is an open source payment gateway. Which means that it has contributors from around the world who are constantly contributing to its platform to make it better. Stripe offers very competitive fees for you based on its competitors pricing. Stripe is available at the time of writing this in 9 different countries and 100+ different currencies and 9 different card types. In order to use Stripe on your website you will need to create a free account on Stripe and make sure you have an SSL certificate installed. Otherwise, like PayPal your customers will need to enter their credit card information on a third-party page.

A large, bold, lowercase 'stripe' logo in black, positioned on the right side of the slide. The font is a clean, sans-serif typeface.

## Authorize.net

Authorize.net is another familiar merchant services brand that your customers may recognize. They charge a \$99 setup fee and \$25 monthly fee to use their payment gateway. They share a competitive rate of 2.9% of the transaction amount plus a 30 cents transaction fee. Authorize.net has no monthly limits like PayPal Standard and they support both recurring and mobile payments. Authorize.net is available in 5 different countries, supports 6 different currencies and 6 different card types.

**Authorize.Net**<sup>®</sup>  
a **CyberSource** solution

# First Data

First Data in our opinion is more or less a “customized” solution depending on the size of your business. The monthly fees and transaction fees are going to depend on the scale of your business and purchases. First Data is generally used when you want a solution that will partner directly with your bank. The service is supported in 50+ countries, 140 currencies and 5 different card types. If you are interested in the rates First Data can provide to you then contact them from their website. First Data also supports recurring and mobile payments. An SSL will need to be installed in order to take payments directly on your website.



**First Data**<sup>™</sup>

# Comparison Chart

## PAYMENT GATEWAY COMPARISON CHART

**NOTE:** These amounts reflect the monthly subscription for the payment provider.  
Formstack does not charge a fee to integrate with any of our payment partners.

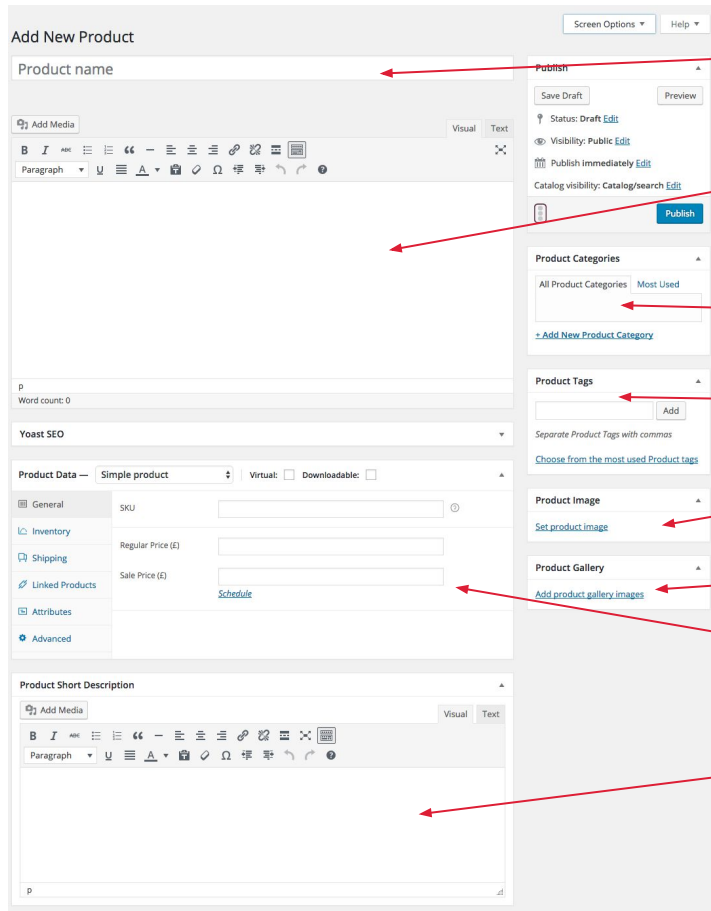
	 MONTHLY FEES	 TRANSACTION FEES	 COUNTRIES	 CURRENCIES	 CARD TYPES	 LIMITS	 ON-FORM PAYMENTS	 RECURRING BILLING	 MOBILE PAYMENTS
<b>Authorize.Net</b>	\$25* ⓘ	2.9% + 30¢ ⓘ	5 ⓘ	6 ⓘ	6 ⓘ		✓	✓	✓
<b>beanstream</b> <small>Business Payments</small>	\$0	2.25-2.65% ⓘ	3 ⓘ	2 ⓘ	5 ⓘ		✓	✓	✓
<b>Chargeify</b>	\$129+	n/a	Based on your payment gateway ⓘ	20 ⓘ	Based on your payment gateway		✓	✓	
<b>DWOLLA</b>	\$0 - \$1500	n/a	USA	1 ⓘ	Linked Bank Account	Personal: \$5,000 Business: \$10,000	✓	✓	✓
<b>FirstData</b>	Must contact FirstData ⓘ	Must contact FirstData ⓘ	50+ ⓘ	140 ⓘ	5 ⓘ		✓	✓	✓
<b>PayPal</b>	\$0	2.9% + 30¢	All countries.	20 ⓘ	5 ⓘ	\$10,000 ⓘ		✓	✓
<b>PayPal</b> <small>Website Payments Pro</small>	\$30	2.9% + 30¢	3 ⓘ	23	5 ⓘ		✓	✓	✓
<b>PayPal</b> <small>PayFlow Payment Gateway</small>	\$0-25 ⓘ	0.10¢	4 ⓘ	22	5 ⓘ		✓	✓	✓
<b>stripe</b>	\$0	2.9% + 30¢	9 ⓘ	100+ ⓘ	6 ⓘ		✓	✓	✓
<b>WE PAY</b>	\$0	2.9% + 30¢	USA	1 ⓘ	4 ⓘ				✓

*Credit: This image was taken from the [formstack.com](https://www.formstack.com) website.*

*To view this comparison chart or for more information please visit: <https://www.formstack.com/payment-gateway-comparison>*

# The Single Product Page





Product Title

Product Description (Long) generally displayed after short description and button on the Additional Information tab

Product Categories

Product Tags (Descriptive keywords)

Main Image

Additional Images

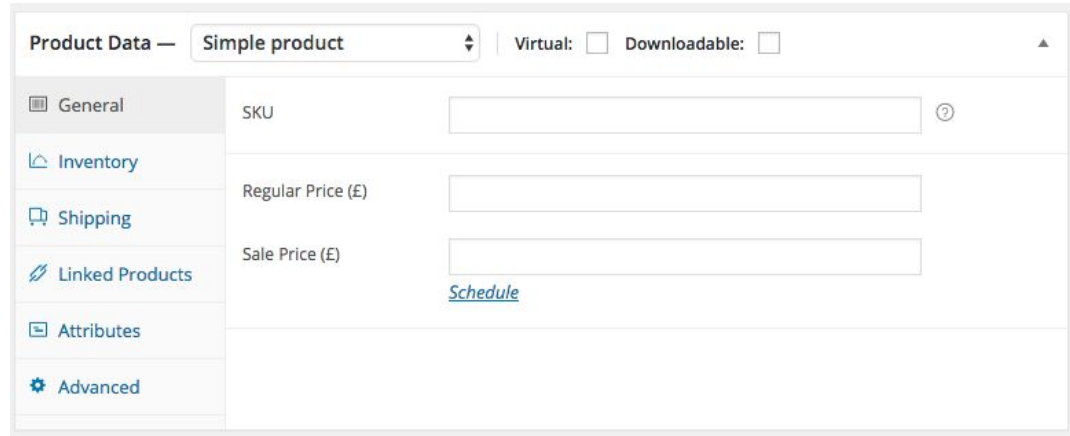
Product Data (configuring your product)

Short Description - Generally displayed next to image above the price and button

# Product Types

# Simple products

Simple Products mean there are essentially no variations of this product. For instance, a simple product may be a paperback book, a picture frame, even your digital services or ebooks. You can optionally choose to keep track of inventory for this product if you have the “Manage Stock” option selected in WooCommerce settings. Attributes in this case will create separate tabs on the front end for more information.

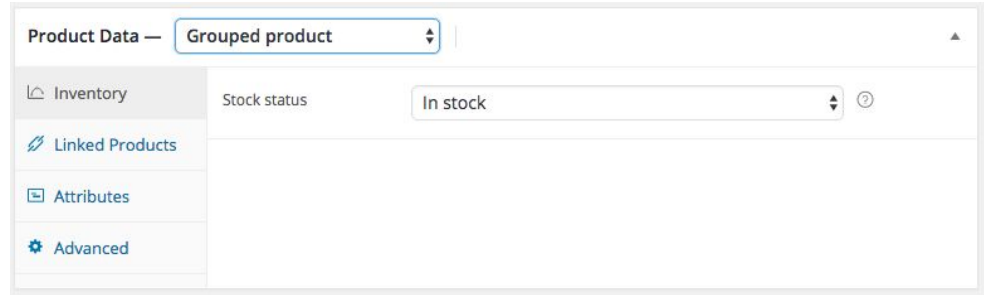


The screenshot shows the 'Product Data' section of the WooCommerce admin interface. The 'Product type' is set to 'Simple product'. There are checkboxes for 'Virtual' and 'Downloadable', both of which are currently unchecked. The 'General' tab is active, showing input fields for 'SKU', 'Regular Price (£)', and 'Sale Price (£)'. A 'Schedule' link is visible below the 'Sale Price (£)' field. The left sidebar contains navigation links for 'General', 'Inventory', 'Shipping', 'Linked Products', 'Attributes', and 'Advanced'.

Product Data —	Simple product	Virtual: <input type="checkbox"/>	Downloadable: <input type="checkbox"/>
General	SKU	<input type="text"/>	<input type="text"/>
Inventory	Regular Price (£)	<input type="text"/>	<input type="text"/>
Shipping	Sale Price (£)	<input type="text"/>	<input type="text"/>
Linked Products			<a href="#">Schedule</a>
Attributes			
Advanced			

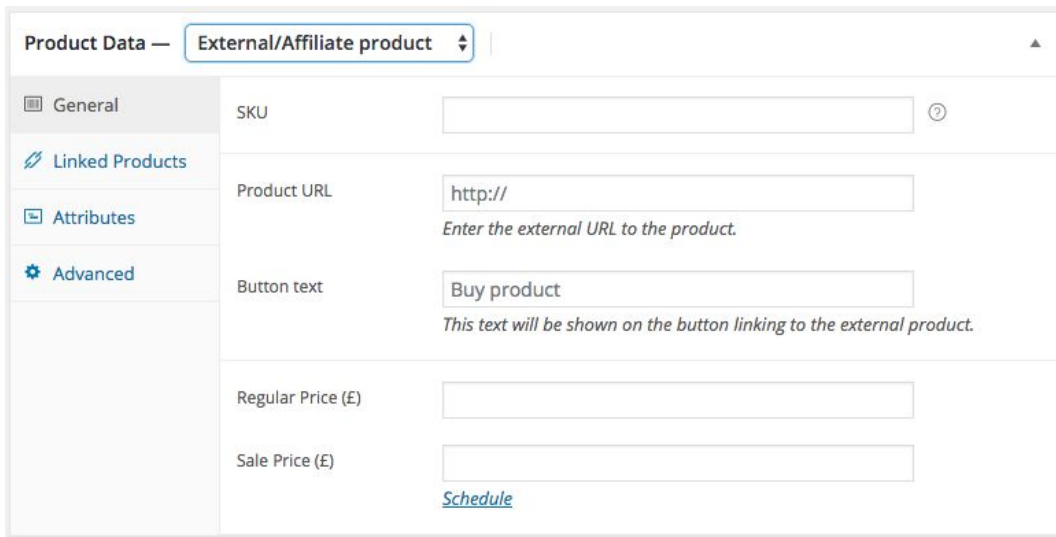
# Grouped products

Grouped products are a way for you to “group” several products together to be purchased as one product. Think of this as something similar to you have an apparel website and you have create a product for a specific shirt, a specific hat and some shoes. You can create a Grouped Product that will include all three of these items to be purchased for maybe a discounted price.



# Affiliate products

Affiliate products is pretty self explanatory. Maybe you have an affiliate relationship with Amazon, or you would like to list your ebay items on your website for sale. This product type allows you to plug in a unique URL and button that once the user clicks they will be redirected to so they can complete their purchase.

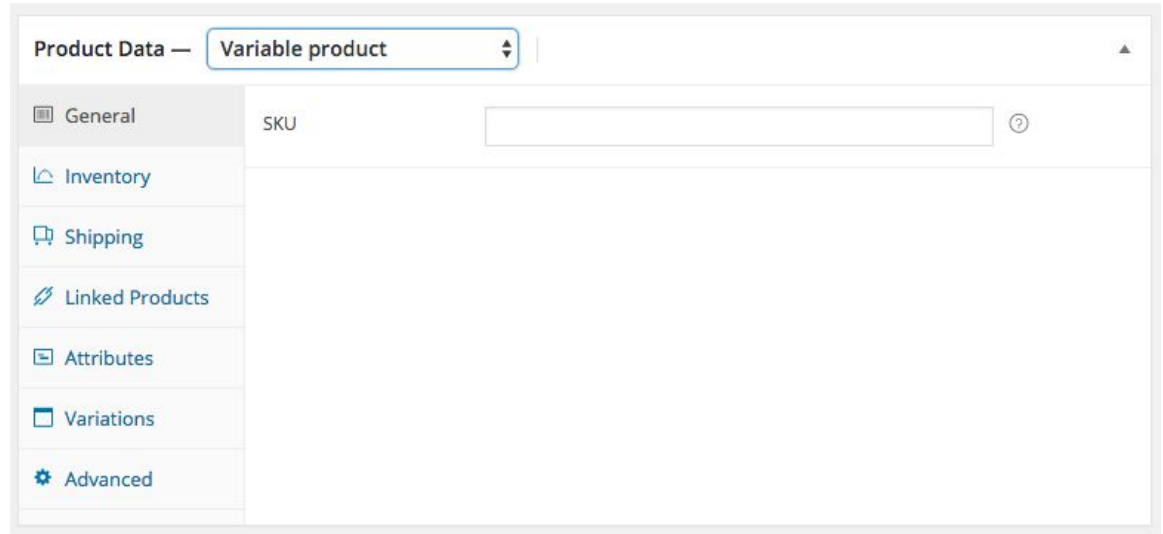


The image shows a screenshot of a product data form in a web application. The form is titled "Product Data" and has a dropdown menu set to "External/Affiliate product". The form is divided into several sections: "General", "Linked Products", "Attributes", and "Advanced". The "General" section contains a "SKU" field with a help icon. The "Linked Products" section contains a "Product URL" field with the value "http://" and a help icon, with a note below it: "Enter the external URL to the product." The "Attributes" section contains a "Button text" field with the value "Buy product" and a note below it: "This text will be shown on the button linking to the external product." The "Advanced" section contains two fields: "Regular Price (£)" and "Sale Price (£)", both empty. There is a "Schedule" link below the "Sale Price (£)" field.

Product Data — External/Affiliate product	
General	SKU <input type="text"/>
Linked Products	Product URL <input type="text" value="http://"/> <small>Enter the external URL to the product.</small>
Attributes	Button text <input type="text" value="Buy product"/> <small>This text will be shown on the button linking to the external product.</small>
Advanced	Regular Price (£) <input type="text"/>
	Sale Price (£) <input type="text"/> <a href="#">Schedule</a>

# Variable products

Variable products are products that may have several variations. An example of a variable product would be a t-shirt. Shirts come in many sizes and colors, so in this case “Sizes” would be an attribute as well as “Colors”. The values would be something similar to Sm, Med, Lg and any color variants for this particular product. You will have various options available to you once you create your variable product.



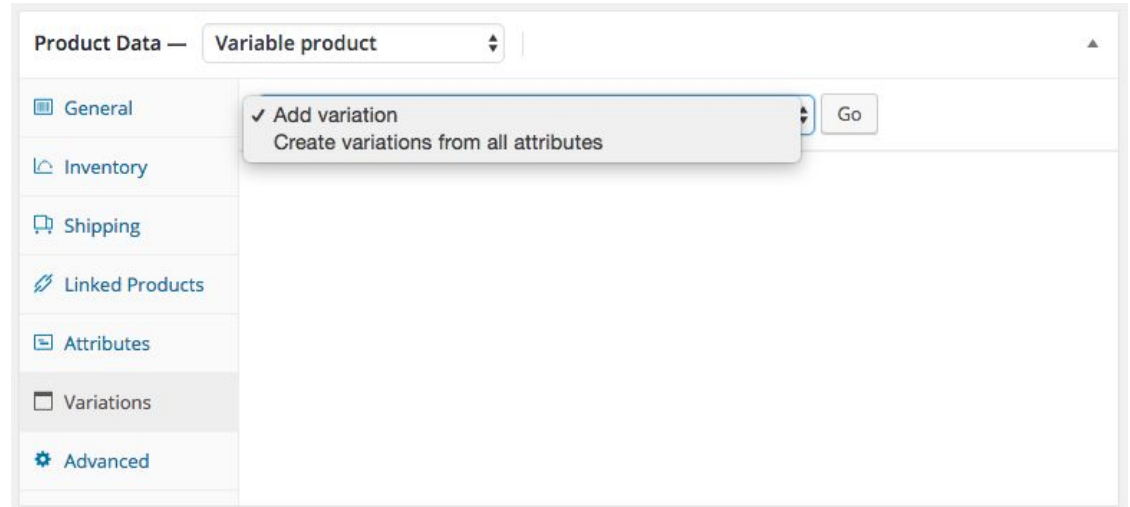
# Variable products - Attributes

The first thing you will want to do is create the Attributes. You can do this globally by going to Products (on the left admin menu) > Attributes or make it specific to this product. Following our example on shirts. I would first click the Add button next to Custom product attribute. Then for Name I would choose Sizes, for the values I would list each option separated by the pipe sign “|” such as Large | Med | Small. Now you can click the Add button again and do the same thing for colors. Make sure to select both “Visible on Product Page” (customer can see available options in the tabs section of the page) and Used for Variations (these are options the customer can choose from) to make these selectable and click Save Attributes.

The screenshot shows the 'Product Data' section for a 'Variable product'. The 'Attributes' tab is active, displaying a list of attributes. The 'Size' attribute is currently selected and expanded. It has a name of 'Size' and values of 'Large | Med | Small'. Both 'Visible on the product page' and 'Used for variations' are checked. Below it, the 'Color' attribute is partially visible, with a name of 'Color' and values of 'Red | Blue', also with both checkboxes checked. The interface includes a sidebar with navigation options: General, Inventory, Shipping, Linked Products, Attributes (selected), Variations, and Advanced. At the top right, there is an 'Add' button and an 'Expand / Close' link. At the bottom, there is a 'Save Attributes' button and another 'Expand / Close' link.

# Variable products - Create Variations

The next step would be to click on the Variations tab and generate your variations. From the dropdown menu select “Create variations from all attributes” and click Go. This will create all of the possible combinations based on your attributes. Note: You can only do 50 combinations “per run” meaning if you have more that are not listed, just repeat this process to finish creating all possible variations of your product.





# Variable products - Create Variations (Cont)

Now that your variations are created you will see a collapsed version of each variation. To edit that variations information such as price, weight, dimensions and other information simply click on the variation to expand/collapse or click the “Expand/Collapse All” link toward the top of your first variation. From this page it is almost like each variation is it’s own simple product. So now you can choose if this is a virtual product, downloadable product, set price and sale price, stock management as well as the dimensions. You can also add an image for each variation if you wish which the user will see depending on the variation they select.

Don’t forget to Publish the product ;-)

The screenshot displays the 'Product Data - Variable product' interface. The left sidebar contains navigation tabs: General, Inventory, Shipping, Linked Products, Attributes, Variations, and Advanced. The main content area is divided into several sections:

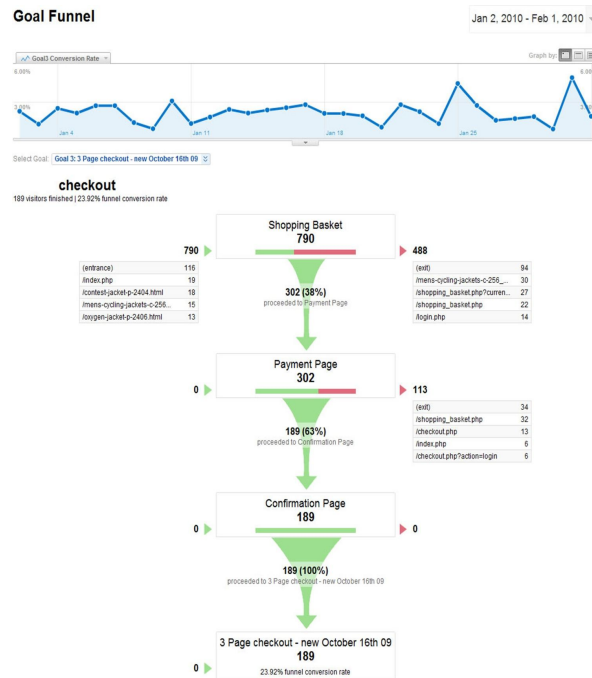
- General:** Default Form Values (No default Size, No default Color), Add variation button, and a 'Go' button with a link to '6 variations (Expand / Close)'.
- Variations:** A dropdown menu showing '#52: Large' and 'Red'. Below it is an image upload icon and an SKU field.
- Advanced:** A list of checkboxes:  Enabled,  Downloadable,  Virtual, and  Manage stock?.
- Price and Stock:** Regular Price (€) and Variation price (required) fields; Sale Price (€) with a 'Schedule' link; and a Stock status dropdown set to 'In stock'.
- Weight and Dimensions:** Weight (kg) field set to 0 and Dimensions (LxWxH) (cm) field set to 0, 0, 0.
- Shipping and Description:** Shipping class dropdown set to 'Same as parent' and a text area for Variation Description.
- Variation List:** A table of variations with columns for ID, Name, and Attributes. The visible rows are:
  - #51: Large, Blue
  - #50: Med, Red
  - #49: Med, Blue
  - #48: Small, Red
  - #47: Small, Blue
- Footer:** 'Save Changes' and 'Cancel' buttons, and a link to '6 variations (Expand / Close)'.

# Growing your Empire

910.302.3286 // [contact@designloud.com](mailto:contact@designloud.com) // [www.DesignLoud.com](http://www.DesignLoud.com)

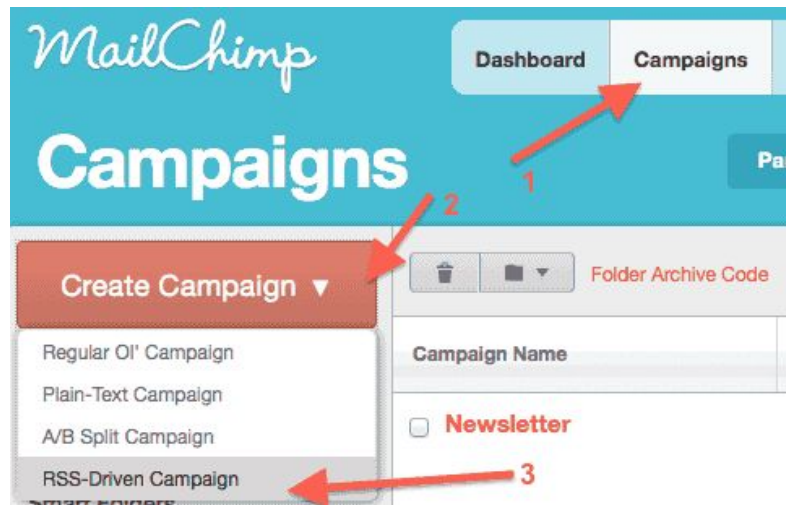
# Google Analytics

Google Analytics is a free tool - all you need is to create or use your Google account to sign up. Once you sign up you will need to add your website to Analytics. This is a fairly easy process where they ask your web address, industry and a name you can identify with. Then you will be supplied a tracking code you can either insert manually in your footer.php file or use a Google Analytics plugin. The best part about Analytics is you can identify who your users are based on age, interest, location and demographic. You also can see how they interact with your website, and most importantly you can set up “Goals” and “Conversions” to see how well your shop is working for you. See how many people “Fall off” from your site versus how many people complete the checkout process.



# The follow-up process

Generally about 60 - 80% of your website's visitors may never come back to your website, even after purchase. So keeping your brand in front of them to keep driving sales and traffic to your site is essential. Using a service like MailChimp allows you to reconnect with your customers. You can create a list in MailChimp for "Customers" and create campaigns for this list. One of the best options would be an RSS Driven campaign. Meaning your campaign can be sent to customers automatically every week, bi-weekly or monthly with new products. Because WordPress is RSS driven, you should be able to use something like `your-site.com/feed?post_type=product` for the feed URL.



# Pay per click/Remarketing

Pay Per Click and Remarketing can be powerful tools for your shop. The best thing about these services is you can put your products directly in front of potential customers as they are ready to buy your product. They search for something on a search engine and based on your marketing campaign and budget your ad will be shown to them as they are actively looking for your product. Remarketing happens once the user lands on your website, a cookie is placed on their computer and then they begin to see your ad (generally specific to that product they were searching) across the web on other websites so you can re-engage with them and invite them to purchase. It is a rule of thumb that both of these should contain some sort of deal or promotion but your remarketing campaign should be your “next level” deal meaning the bottom line you can give them to invite them back to your website to make their purchase.

# Social Media

## Sharing:

As Social Media plays a more important role in our lives it also allows you another medium for you to attract new customers. Including things on your product pages like social sharing icons or incentives (like deals) to share your products on their social media accounts will increase your brand awareness and open you up to new customers you may have not otherwise been able to reach.

## As a distribution network:

Facebook is among the most popular for this, there is a little tool in Facebook that will allow you to essentially embed an iframe (a web page) as a tab on your Facebook page. Think of how powerful it is to allow people to browse your products directly from your Facebook page without them needing to leave Facebook.

# Smart popups

Ethically using pop-ups are a great way for you to increase your number of email subscribers and engage users to purchase your product. With technologies today you can use these in various, non intrusive ways. Some examples would be exit-intent (before the user closes your website), display after XX number of seconds, display on certain pages/posts/products, etc. This is a great place to offer a promotion or special offer to encourage the user to stick around and make a purchase.



# In Conclusion

Thank you for following our presentation on Setting up Shop with WooCommerce. I hope you have learned a lot from this presentation and you can start to plan out your eCommerce website and grow your empire. If you need any help at all scaling your empire or you would like more information do not hesitate to contact us.

Thank you for following along,  
Derek Schmidt



910.302.3286 // [contact@designloud.com](mailto:contact@designloud.com) // [www.DesignLoud.com](http://www.DesignLoud.com)