Welcome to BigCommerce!

Congrats on taking the first step towards growing your online presence. Starting or migrating to a new online store may seem like a daunting task but we are here to help you along the way with our step by step guide.

Getting started with BigCommerce

This playbook is meant to be a high-level guide for merchants who are just getting started selling online or switching over from another small-business ecommerce platform, such as Shopify or WooCommerce.

In the sidebar you will find key sections broken out with links to our Help Center documentation for even more detail. If at any point you get stuck or have questions, you can always contact our world class 24/7 live support team at **support.bigcommerce.com**. This service is free to you even during your trial period—make sure you have your support pin handy (found in the bottom left corner of your store when logged in)! Let's get started.

HELPFUL LINKS

◢ **Store Login**
Log into your BigCommerce store

◢ **Account Dashboard**
Manage your billing details and purchase a domain or SSL certificate

◢ **Help Center**
Find user documentation, guides, product news, and updates

◢ **App Marketplace**
Browse and search for apps to extend your store's functionality

◢ **Theme Marketplace**
Browse storefront themes

◢ **Partner Directory**
Search through our agency partners (e.g. developer, designer, marketing consultant)

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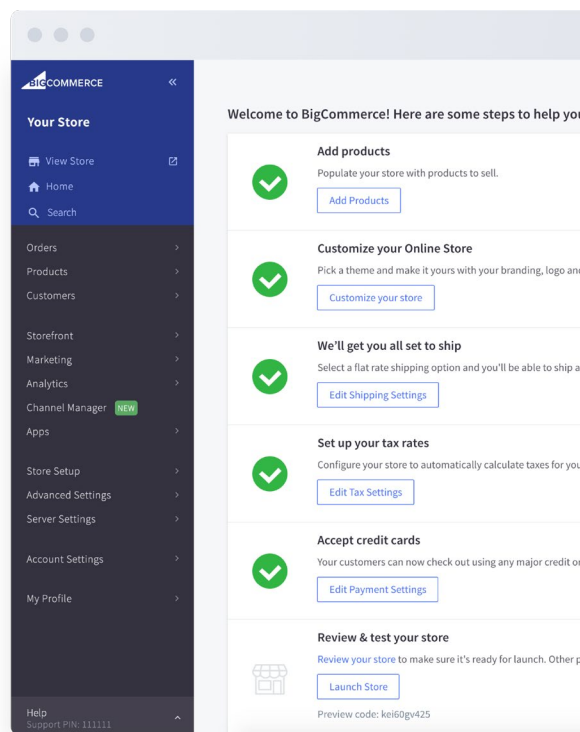# Navigating your BigCommerce store

Welcome to your new store! The main view you see when you log in is called the control panel dashboard. This is where you'll initially set up and configure your store and where you'll do most of your product catalog, customer, and order management. You'll also have quick access to sales and marketing reports.

Setting Up Users

If you're working with others to build your store, you'll want to set up your user accounts right away. These let people log into the store, and you can set different permissions per user. See **Users** for a walkthrough on setting up your user accounts. We strongly recommend that the Store Owner role belongs to the individual being billed for the store.
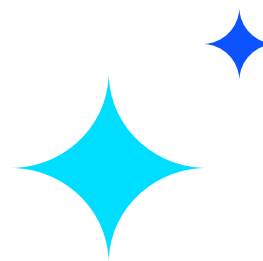
Store Profile

This is where basic store information is entered, such as store name, country, and contact information. These settings will affect other settings in your store such as which payment gateways are available (by country).

Migrating from another platform

If applicable, BigCommerce supports several ways to migrate your data. This includes our self-service catalog transfer apps, CSV Import tool, completely managed transfers through BigCommerce's Data Migration Services team, and managed transfers through our agency partner ecosystem. Factors such as ease of use, number of SKUs, orders and sales history, and custom product fields are key considerations to take into account before selecting a migration method.

	CATALOG TRANSFER APP (FREE)	CSV IMPORT (FREE)	MANAGED TRANSFER	BIGCOMMERCE APPS
PRODUCTS	✓*	✓	✓	N/A
CATEGORIES	✓	✓	✓	N/A
CUSTOMERS**	✓	✓	✓	N/A
ORDERS			✓	N/A
REVIEWS				PRODUCT REVIEW IMPORTER & EXPORTER APP (FREE)

*App is limited to 10,000 SKUs
**Passwords cannot be migrated for PCI compliance

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Catalog Transfer Apps

Our Catalog Transfer apps allow you to migrate your catalog data (products, options, categories, customers) into your new BigCommerce store from the platforms listed to the right.

CSV Transfer

As an alternative, you can import your **products** and **customers** into your BigCommerce store by using a CSV file. Keep in mind that you will likely need to reformat your source CSV file so that it can be imported successfully into your BigCommerce store. Spreadsheet programs such as Excel or Google Sheets are necessary in order to edit CSV files. For stores with less than 10,000 SKUs, we recommend using one of our Catalog Transfer apps for migrating your products, and then using a CSV import to clean up your product data.

Managed Transfer

If you don't feel comfortable migrating your store's data using the app or CSV file, consider using a managed data transfer through BigCommerce's Data Migration Services team. They will work directly with you to ensure that your data is securely migrated to your satisfaction, tailoring their services to match your business needs. The team is highly experienced in working with large catalogs with SKUs on more than 50 ecommerce platforms. They are also able to import orders as part of a managed data transfer, which allows for consistency in customer order history as you move. Contact us to request a quote.

Please note that managed transfers from Shopify are not supported by our Data Migration Services team due to some Shopify API restrictions. If you are migrating from Shopify, you will need to use the **free Shopify app in the App marketplace, one of our other **Data Migration apps**, or a **Partner** to assist in the transfer.

Agency Partner

If you don't feel comfortable migrating your store's data using the app or CSV file, and you are using a developer or agency to help with your store (you might need them if you want to rebuild your design look and feel), consider using a BigCommerce agency partner to help with the data migration. They will work directly with you to ensure that your data is securely migrated to your satisfaction, tailoring their services to match your business needs. Feel free to contact one of our certified agency partners from our **Partner Directory**.

TRANSFERRING YOUR DESIGN

Check out our **partner directory** for agency developers who can help rebuild your brand's look and feel.

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Build your product catalog

Partner Integrations

Do you currently operate out of a point-of-sale (POS)? Before you start building out any products, make sure to check out the **integrations** we have with many of the leading POS systems. Integrations can help save you time by allowing you to seamlessly import your existing catalog from the POS to BigCommerce and to keep your inventory synced whenever you make a sale.
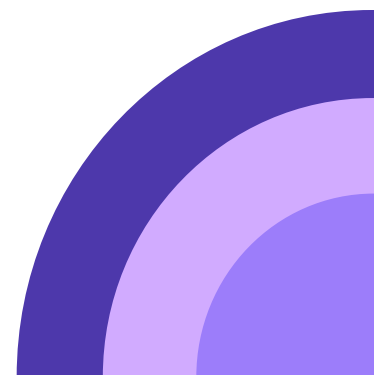
Setting up products

Product Categories: This is the organizational unit that appears throughout your storefront and allows your customers to browse by product type. If you've ever shopped online for clothing, "Men," "Women," and "Children" are probably browsing categories you're familiar with.

▲ Start by collecting a list of the products you intend to sell and group them into five or so categories. Depending on how many unique products you have, you can divide even further into subcategories.

Adding Products: You will see a listing of your entire product catalog (if you import from a POS) and some sample products preloaded in your store, which we recommend checking out to get an idea of what everything does. Products can be added individually within the control panel under Products › Add.

▲ If you need to update several products at once, we recommend using the **Bulk Edit** feature.

▲ **Adding Images, Videos, and Descriptions:** This is a critical step you cannot overlook—make sure you spend time to add high-quality product content through product images, videos (if applicable), and descriptions which also help with SEO.

• Some key information to include in your product descriptions: name of item, price, weight and dimensions, variants (such as color and sizes available), and a clear description of the item.
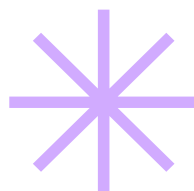

PROTIP: BIGCOMMERCE MOBILE APP

This is an easy way to get product images uploaded from your phone. Our app is free and available to download from the Apple App Store and Google Play Store.

NEED HELP WITH NEW PRODUCT CONTENT?

SOONA is an app/service that helps merchants create high-resolution photos and videos of their products.

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Back office settings

While BigCommerce handles the checkout, shipping, and payment integrations for you, you'll still need to figure out how you want them to function. In this section, we'll go over the basics of back-end store setup.

Currency

This setting allows you to select what currencies your shoppers can view prices in. If you are using a compatible payment gateway, you can even allow shoppers to purchase in currencies other than your store's default transactional currency. Many international shoppers feel more comfortable making a purchase when they can view prices—and make purchases—in their own currency. For more information, see **Managing Currencies**.
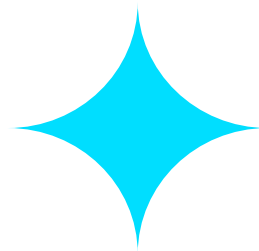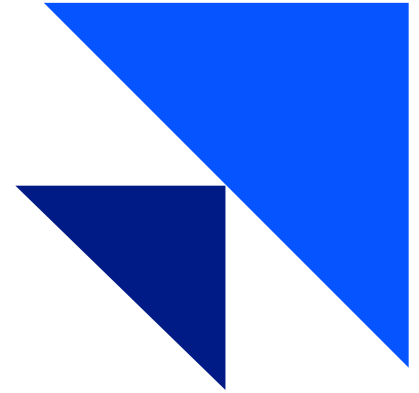
Payments

In order to accept credit card payments, you will need to set up a **payment gateway**. We have over 65 payment gateway integrations available out-of-the-box, serving 100+ countries and over 250 local payment methods. We also offer integrations to the most popular digital and mobile wallets, such as Apple Pay, Amazon Pay, Venmo, and more. Navigate to Store Setup > Payments.

◢ You can also offer **offline payment methods** as an alternative such as Bank Deposit, Check, Money Order, and Cash Delivery.

The Shipping Manager

This is where you will set up your store's origin address (where you ship from), shipping zones (where you ship to), and shipping services shown to shoppers (like flat rate or real-time quotes). To get started, go to Store Setup > Shipping. Our built-in shipping setup will walk you through configuring your origin address and the shipping services you want to offer.

◢ **Buy Online, Pickup In Store (BOPIS)** By setting up a shipping method as "In Store Pickup," you can give shoppers the option to pick up their order at a physical location instead of having it shipped to an address. It's best to use this method in a custom shipping zone based on local zip codes. For more advanced BOPIS, check out our apps **here**.
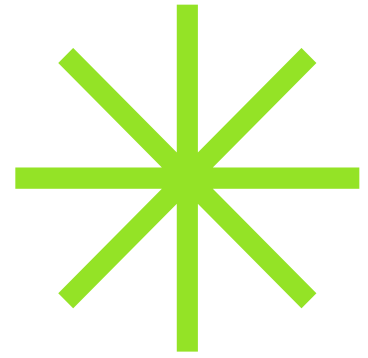
NEED MORE HELP WITH SHIPPING?

Find more information in our **Help Center**.

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Taxes

Go to Store Setup > Tax to determine how tax is displayed and charged on your storefront. Depending on your location and business needs, you can set tax up manually or use an automated tax service, such as Avalara.

- ◢ **Manual Tax** All stores have the option of using a **manual tax setup**. If you operate in countries not supported by our automatic tax options, you must use manual tax. With manual tax, you can use Tax Classes to specify which products are taxable (and at what rate), Tax Zones to specify the geographic areas (states, provinces, or countries) where tax should be applied, and Tax Rates to specify how much tax to charge.

- ◢ **Automatic Tax** As an alternative to manual tax, many stores have the option of using a **third-party tax service** to automate tax calculation. Using a third-party tax provider service can save you time configuring your taxes and provide peace of mind that your taxes are being handled by an outside professional service. In addition to calculating tax in the cart and at checkout, using automatic tax gives you the option to send transaction data for each order to your provider for tax documentation and filing purposes. See **Automatic Tax Setup** for more information on available tax service providers and how to set them up.

Storefront Settings: Theme & Design

Ensure your store looks professional, attracts your target customer, and has the right calls to action to help them convert when they visit your site.
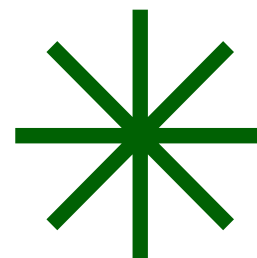
Selecting a Theme

Go to Storefront > Theme Marketplace to view our marketplace of both free and paid **professionally designed themes**. Our modern, fully responsive themes are optimized for various product catalogs and industries. Here are some specific examples we love:

- ◢ **Fashion & Apparel:** LifeStyle Default theme

- ◢ **Food & Beverage:** Covent Garden Calm theme

- ◢ **Home & Garden:** Orbit Light theme

Page Builder

You can make basic customizations using our **Page Builder tool**, allowing you to easily add content to your storefront as widgets via drag and drop. You can preview your changes without publishing, allowing you to continue working on your store's design in the background while your store stays open for business.

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Carousel

The **carousel** is the set of rotating banners on your store's homepage that can be used for a variety of purposes, such as advertising products, showcasing content pages, or displaying promotions like free shipping. The sizing depends on your theme but most use dimensions of at least 1200x600 pixels and images must be in jpg, png, or gif format.

- ◢ If you need to resize images, we recommend using a free online image editor such as **Pixlr** or any image editing program already installed on your computer.

About Us/Contact Us Pages

Create these web pages to share the story about your business and leave a way for customers to contact you, or even an FAQ page. Make sure you highlight any social media channels your business may be on as well.

Manage and Fulfill Orders

You will need to determine how you plan on fulfilling orders. The three main options are dropshipping, self-fulfillment, and via a third party fulfillment service ("3PL"). Most merchants just getting started will use the self-fulfillment option.

Your Fulfillment Strategy

Your **fulfillment strategy** should be getting your customer's order to them as fast as possible—be sure to take time to determine which strategy works best for your business.

- ◢ BigCommerce has a **built-in order management** flow to help you keep track of all orders, even those from connected channels like Amazon and Facebook. Review and customize this workflow based on how you plan to fulfill orders.

Set up Your Email and Gift Certificate Templates

You can **customize any of the emails** sent automatically from your store, such as order confirmation (order invoice), order status updates, abandoned cart recovery (available on select plans), and gift certificate notifications.

- ◢ You can also toggle this off if you use a third party service, such as Klaviyo, Mailchimp, or Marsello.

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Technical Settings: Domain & SSL

Domain

This is how shoppers will visit your store online. By default, your store's domain will use the .mybigcommerce.com subdomain. Once you have selected a paid plan, you can use a custom domain for your storefront (e.g. www.mystore.com).

Purchasing a Domain

The fastest way to apply a new domain is to **purchase** it from BigCommerce. You can also purchase from a third-party registrar but you will need to take an extra step to point your domain to the store before adding it to the store.

SSL Certificate

These are issued by a trusted third party to verify that secured web pages are properly encrypted and all information passed remains private. Having an **SSL certificate** on your storefront provides a sense of security for your shoppers as browsers will indicate if a site is safe/trustworthy. It's an easy way for you to protect sensitive data on behalf of your shoppers.

◢ All BigCommerce stores with a custom domain will have a free Encryption Everywhere SSL certificate automatically installed after the domain is applied to the store. For additional security features, you can also purchase more advanced certificates directly from BigCommerce.

Launching your store

Congrats, you've built out a solid foundation for your online store and are ready to launch! Before launching your store, place a **test order** to ensure that the checkout is working as intended and to gain valuable insight into the storefront customer experience. This will allow you to make sure that your shipping and tax settings are properly set up and enabled, and your payment gateways are accepting payments.

Make sure to take your store out of Maintenance Mode by going to Store Setup > Store Settings and toggle your store to open!

Happy selling! ◢

ALREADY HAVE A DOMAIN?

If you are applying a domain name that has been used previously on another site, you will want to use **URL redirects** to minimize any negative SEO impact.

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