

Shopify Instructions

For each upload you'll need: Net Sales, Markdowns (Discounts), Inventory at Retail, Purchase Receiving (Cost & Retail), and Purchase Orders (Cost & Retail).

***Shopify will provide Sales and Markdowns -**

1. On the right side of Shopify main screen, click "Analytics"
2. Then in the drop down, click "Reports"
3. Find the report titled, "Retail Sales by Product Type"
4. Next make sure to adjust dates for correct range (either month to date or full month end).
5. Lastly, you can edit columns (top right), to take everything out leaving only "Product Type", "Discounts" and "Net Sales" selected.
 - (NOTE: sometimes there will be a filter automatically applied that states "POS location name is not N/A" Please click the "X" to remove this as it will not include sales. Typically, this will be your online/commentsold sales.)

***Delirious Profit or Better Reports app will capture inventory at retail by Product Type.**

For Delirious Profit:

1. Go to "Apps"
2. Click Delirious Profit
3. Wait for it to load, it's notorious for taking a moment to sync. So just hang tight.
4. In the second row or tabs, click "Inventory"
5. There are 2 sections, the first is inventory by vendor. We want the second one, inventory by product type. Scroll past the vendor section for this.
6. In the top right corner of the inventory by product type section, there will be a blue export button. Click this.
7. We will want to use "Retail Price" for our data sheet.
8. So, input this into your data sheet matching your product types to their class with the retail inventory value.

For Better Reports (best for multi-location businesses):

1. Go to "Apps"
2. Click Better Reports
3. For inventory, go to the section labeled "Inventory Levels"
4. Select "Inventory by Location by Product Type"
5. In the top right corner of the inventory by product type section, there will be a button that says "Export". Click this.
6. We will want to use "Total Inventory Value" for our data sheet.

7. So, input this into your data sheet matching your product types to their class with the retail inventory value.

*Better Reports has numerous other useful and customizable reports for those who are interested in some more report visibility. (Aka sales by vendor, sales by product tag, etc.)

***FAVES, M2B, Stocky or Excel for all Purchase Orders and Receiving**

- FAVES: an app that can be downloaded to your phone or tablet for tracking orders.
 - Pros – Market Use and relationship with M1 Process
 - Cons – Currently no desktop version and requires iPhone (currently in development to change)
- Market2Boutique – Shopify App
 - Pros – User friendly use
 - Cons – No downloadable report
- Stocky – Shopify App
- Excel Spreadsheet - we can put together as a temporary solution which will work just fine, but the apps may be more beneficial in the long run.

We can discuss the pros and cons if you'd like.

Data Sheet Template

All of this information will then need to be put into the data sheet template I sent according to its correct product type and location.

Don't worry we will go through tips and tricks for this together. :)

You can upload the reports month end close (last day of the month) or first day of the next month, and then we'll do either weekly or mid-month uploads.