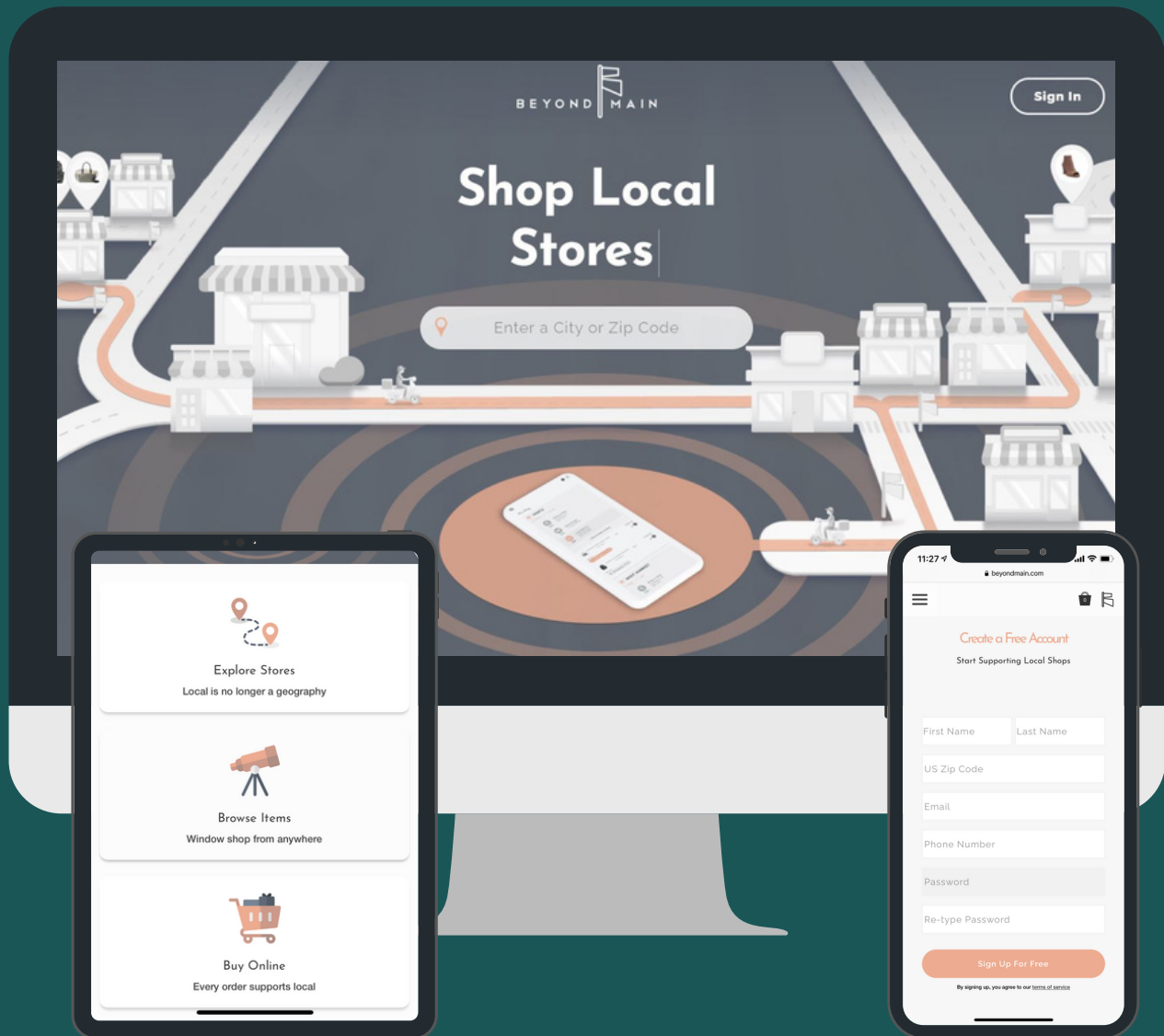


# Set Up & On-Boarding Guide

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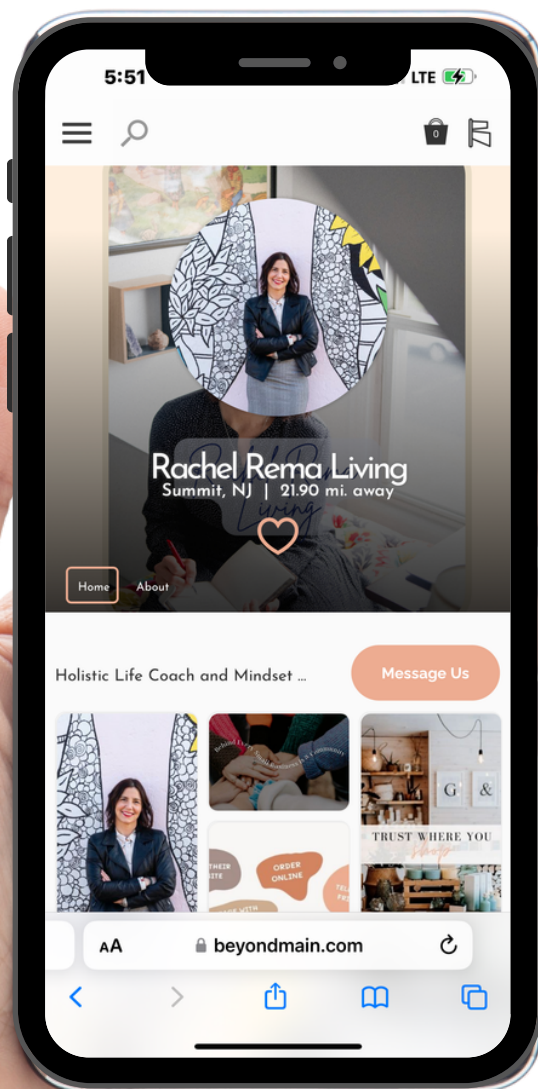
---

*Start building your online shop!*

# Welcome to the platform that was built for you!

We are thrilled you have joined the shop local evolution! Follow the steps in this guide to begin increasing your exposure, sales, and customer base.

Let's get started! Start building your online shop today.

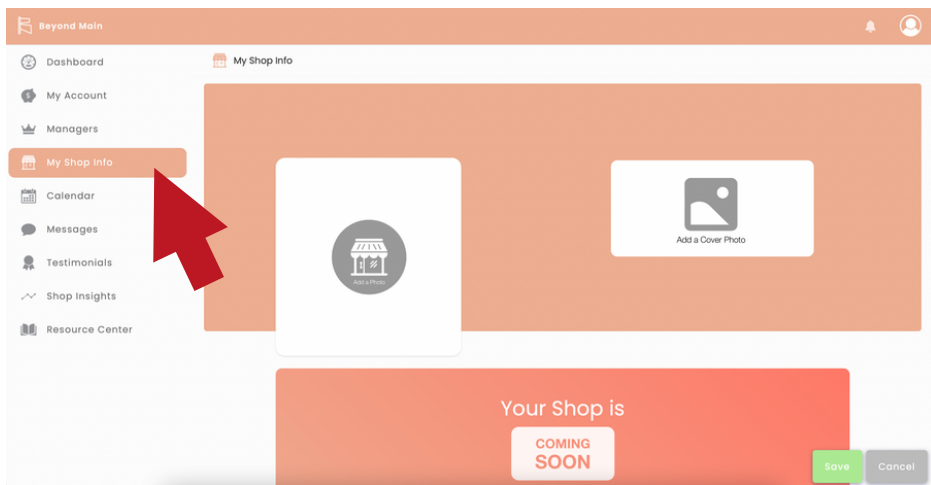


# GET STARTED

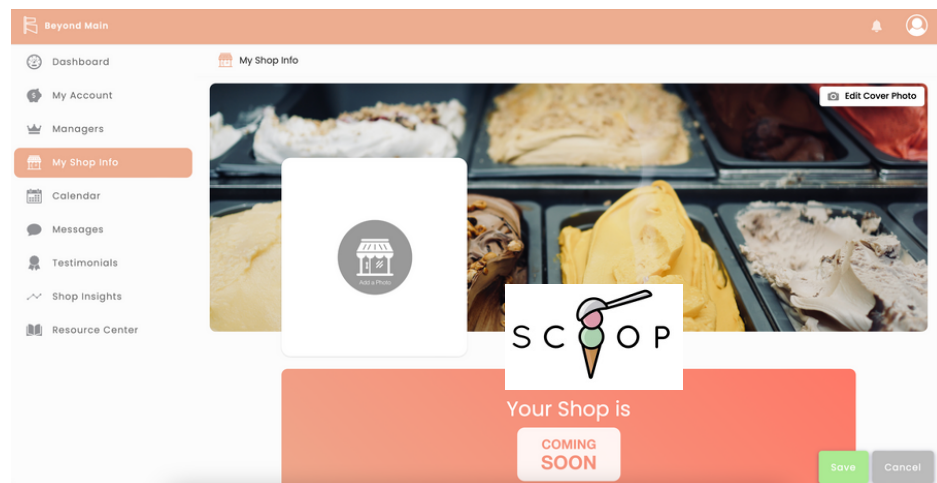
# 01.

**Log In to your BeyondMain.com account.**

Once logged in, click **"My Shop Info"** on the left-hand side to begin personalizing your online profile.



Upload a profile image and banner image



**Make sure to click "save" at every step!**

# 02.

## Add Shop Info

Tell shoppers about your business! Add your shop's name, business description, and tags here.

**Beyond Main**

Dashboard  
My Account  
Managers  
**My Shop Info**  
Calendar  
Messages  
Testimonials  
Shop Insights  
Resource Center

Shop Name\*  
Sam's Ice Cream

Short Shop Subtitle  
Handcrafted ice cream and desserts

Business Story & Description  
Sam's Ice Cream Shop is a family-owned business that specializes in handcrafted ice cream and other desserts. As a family-run establishment, the focus is on providing a personal touch and a welcoming atmosphere for customers. The shop uses only the freshest and highest quality ingredients to create its delicious products, ensuring a satisfying experience for every customer. The family members are actively involved in all aspects of the business, from creating new recipes and sourcing ingredients to serving customers and creating a warm and inviting environment.

Shop Tags

Shop Owner Tags (Select all that apply)  
LGBTQ+ Owned Black Owned Woman Owned Hispanic Owned Asian-American Owned Native-American Owned  
Veteran Owned **Family Owned**

Shop Organization Tags (Select all that apply)  
Non-Profit Certified B-Corp Social Enterprise

Other Shop Tags (Select all that apply)  
**Zero Waste** Pet Friendly

Save Cancel

# 03.

## Add Photos

Bring your profile to life by adding high-quality images. Add images to your profile collage and assign the photos to different areas in your profile.

Media & More

Files & Media

Photos Videos

Camera icon with red arrow

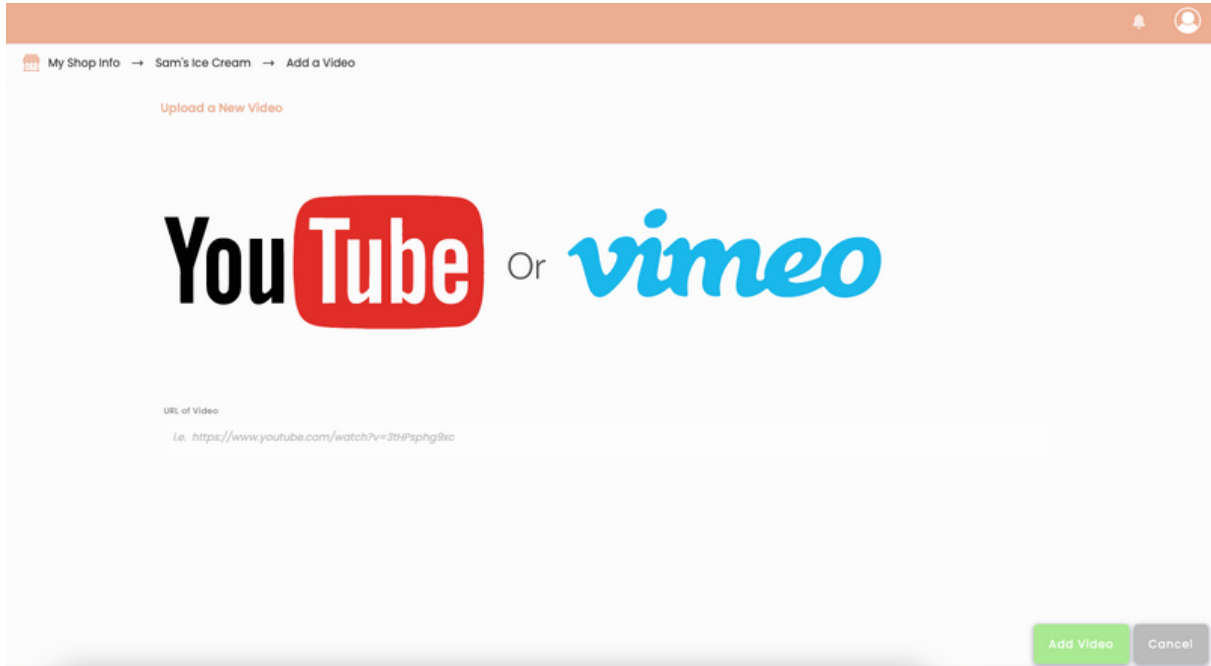
Grid of photo thumbnails: 1. Ice cream cones, 2. Ice cream shop counter, 3. Ice cream cones, 4. Ice cream cones, 5. Ice cream cones, 6. Ice cream cones, 7. Ice cream cones, 8. Ice cream shop counter

Save Cancel

# 04.

## Add Video

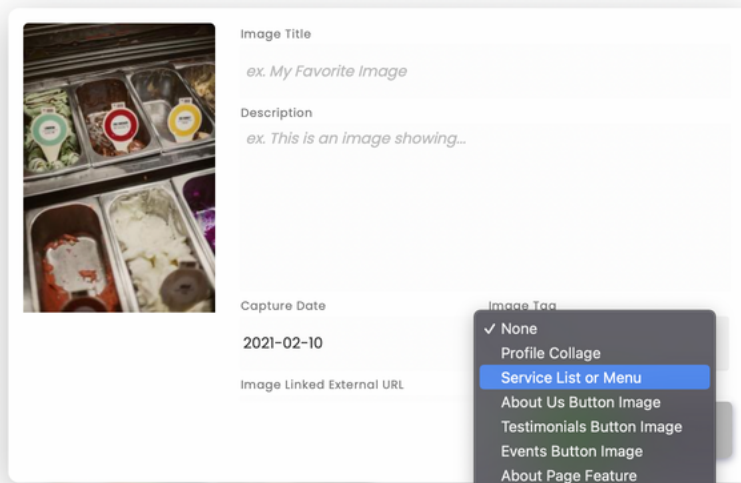
Introduce your business, give a tour of your store, or share your story through video. Add a Youtube or Vimeo link



# 05.

## Assign Tags to Images and Videos

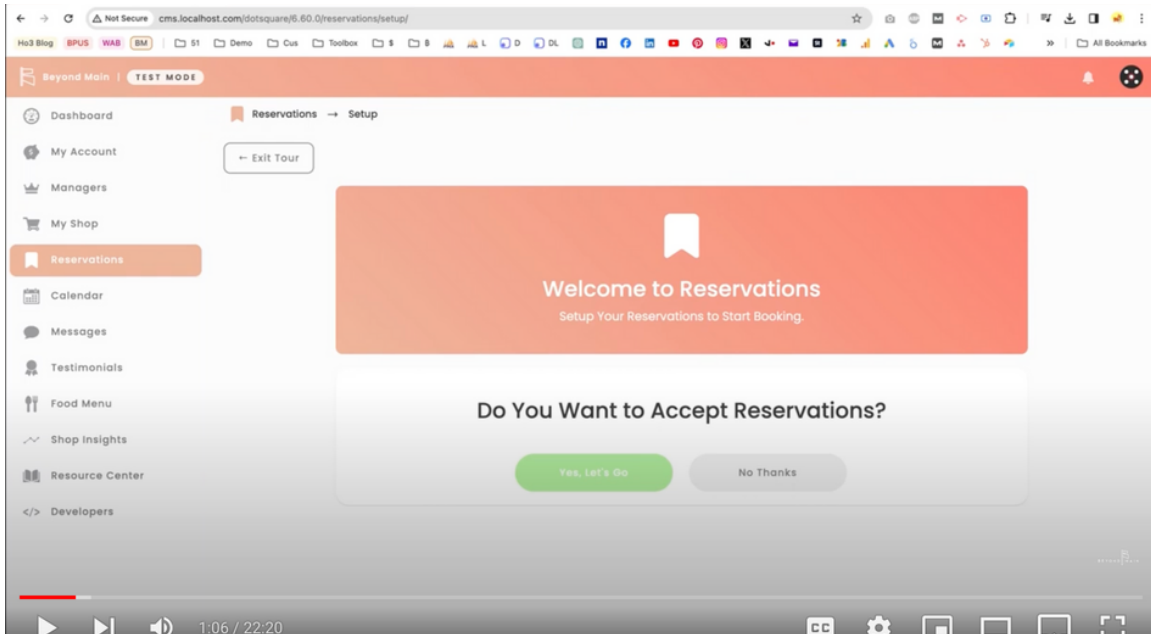
To assign images to areas on your page, select an image in your media gallery and click "image tag" on the bottom right to choose a location for your image.



# 06.

## Set Up Reservation System

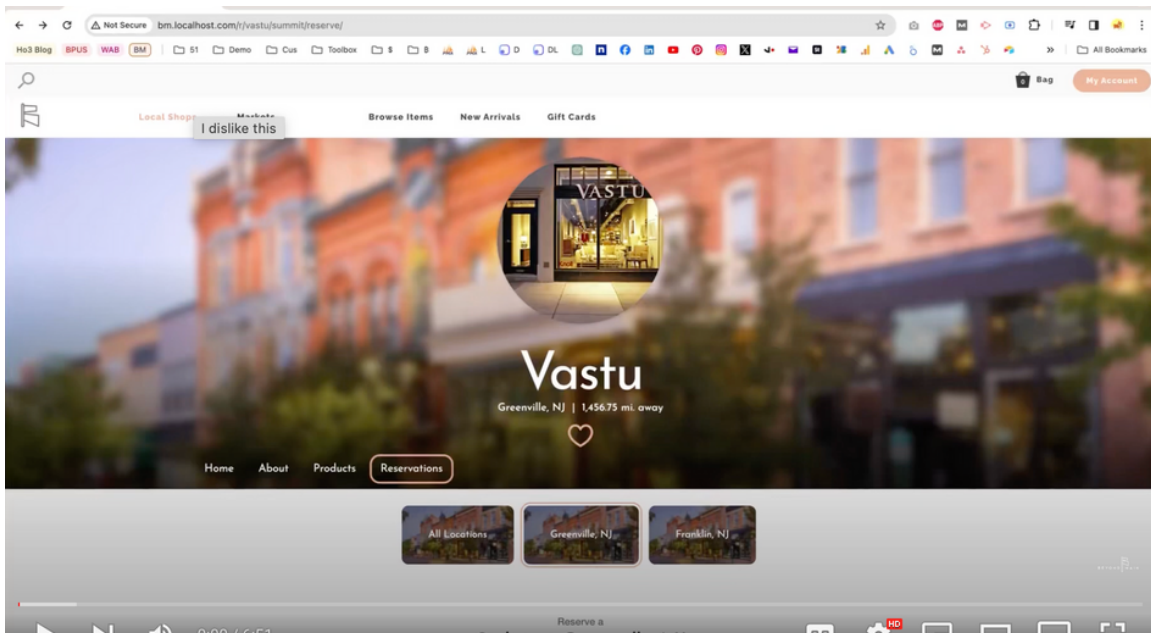
Click below to watch a video tutorial on setting up and managing your reservation system: link existing systems, accept bookings, and streamline the process.



# 07.

## Customer Reservation Booking

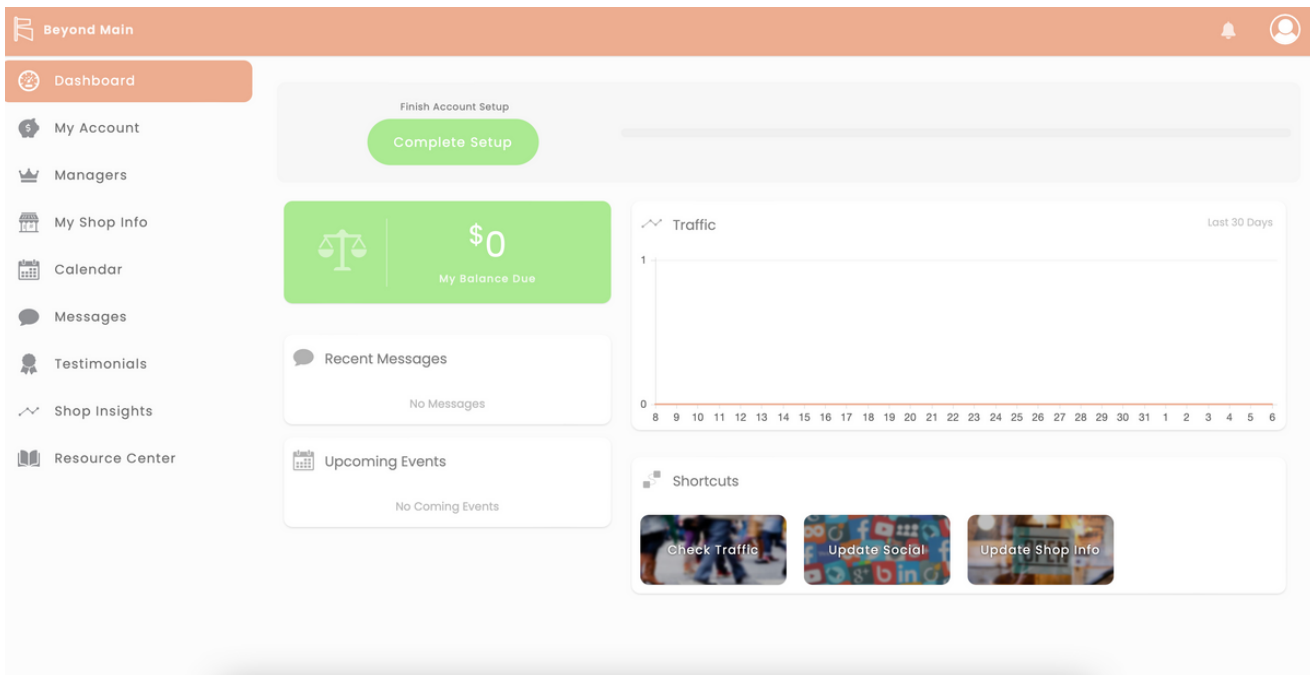
Click the image below to watch a video tutorial on how customers can book reservations or appointments.



# 08.

## Complete Set Up

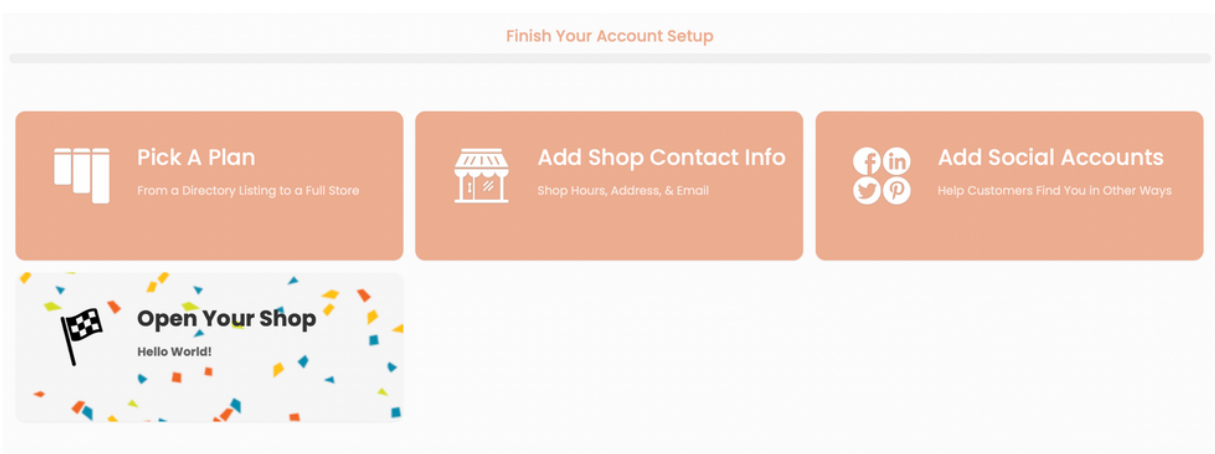
Once you have finished adding all your shop's info and images, go to your store's dashboard and **click the green button** that says "complete set up"



# 09.

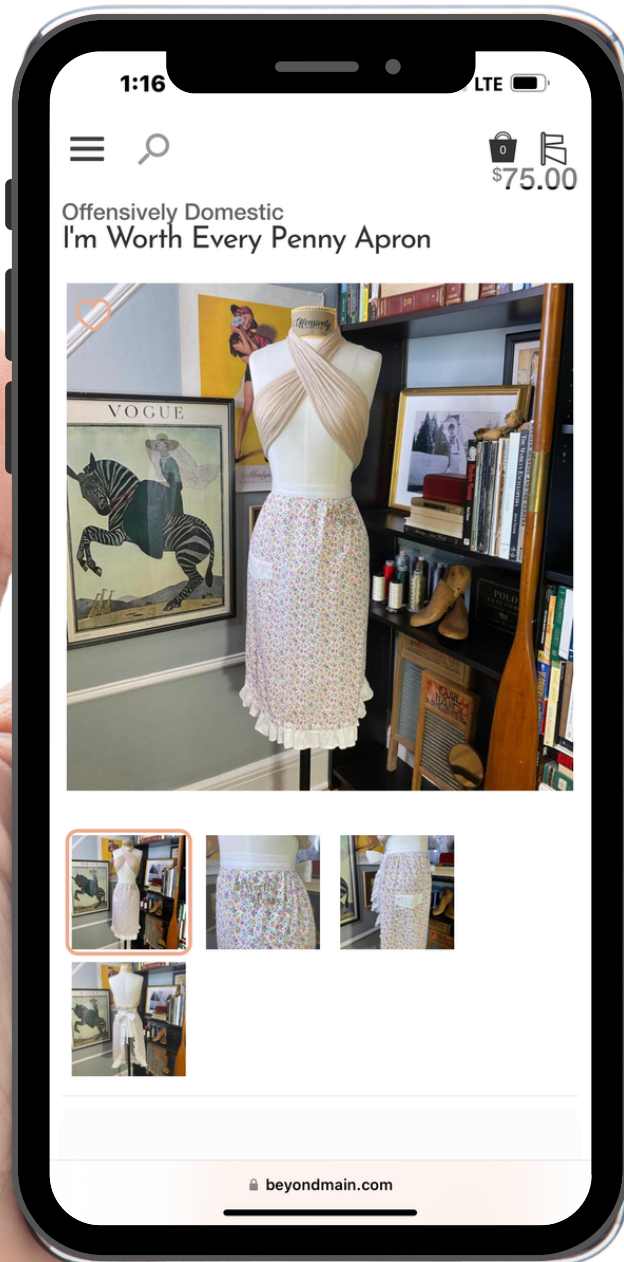
## Add The Final Touches

Follow the prompts to finalize setting up your shop and submit for approval.



# Bulk Import

Learn how to bulk import inventory and access our CSV file template in the onboarding folder in the resource center.



# IMPORT GUIDE

# Definitions

**Item:** The most basic. Can be a product or service.

**Variant:** A sub-component of an item. Contains inventory, price, and dimensions. Each item must have at least one variant.

## Formatting the Sheet

Each item should have at least 2 rows. One for the item itself and one or more for the variant(s). The items and variants are links by the “Item Handle” column. **If a variant has the same item handle as the item row above it, it will be considered part of that item.**

	Item Handle	Item - Columns		Variant - Columns		
Item #1	Item Row	Green	Green	Grey	Grey	Grey
	Variant Row	Green	Grey	Green	Green	Green
	Variant Row	Green	Grey	Grey	Green	Green
Item #2	Item Row	Green	Green	Grey	Grey	Grey
	Variant Row	Green	Grey	Grey	Green	Green
Item #3	Item Row	Green	Green	Grey	Grey	Grey
	Variant Row	Green	Grey	Grey	Green	Green

# Column List (In Order)

## Item Columns

Column Name		Format	Description
★ Item Handle	<p>Required</p> <p>Text</p>	<ul style="list-style-type: none"> <li>No Spaces</li> <li>No Trailing Slashes</li> </ul>	<p><b>IMPORTANT:</b> Variants must also have the same item handle on their rows.</p> <p>Unique to each item. Also used to identify if a variant belongs to an item.</p> <p><i>Note: Item handles may change after importing.</i></p>
For Location	<p>Required</p> <p>Text</p>	<ul style="list-style-type: none"> <li>Comma Separated Location handles</li> </ul>	Which locations you are selling the item and its variants in.
Category Handle	<p>Required</p> <p>Preset List</p> <p>Text</p>	<ul style="list-style-type: none"> <li>No Spaces</li> <li>No Trailing Slashes</li> </ul>	Picked from the existing list of categories.
Item Name	<p>Required</p> <p>Text</p>		The main title of the item.
Is Tangible	<p>Required</p> <p>YES / NO</p>		If the item is a physical product or a service.
Item Images	<p>Text</p>	<ul style="list-style-type: none"> <li>Comma Separated Image URLs</li> </ul>	Images for the entire item. If the "Unique Item Images" (below) is set to "YES", ignore this column.
Brand	<p>Preset List</p> <p>Text</p>		Picked from the existing list of brands. If none is found, it will default to "---"
Subtitle	<p>Text</p>		A very short 1 sentence description.
Description	<p>Text</p>		A short 1-5 sentence description.
Details	<p>Text</p>		A longer description typically used for specifications or technical details.
Active	<p>Required</p> <p>YES / NO</p>		If the item should be imported as a draft or live.
Taxable	<p>Required</p> <p>YES / NO</p>		If the item should be taxed on purchase.
Traits	<p>Text</p>	<ul style="list-style-type: none"> <li>Semicolon separated trait types</li> <li>Comma separated traits</li> <li>Colon after the trait type name</li> <li>Ex: Boot Height: Ankle; Heel Height: 2" - 2.75"; Color: Tan, Beige</li> </ul>	This will attach certain traits for easier visitor browsing filtering and item searching.
Quantity Sold	<p>Integer</p>		Sets the initial quantity that is marked as sold for analytics. Useful if you have been selling the item elsewhere for a while.
Unique Variant Images	<p>YES / NO</p>		If every variant should have their own set of images (YES) or if all the variants look the same (NO).

## Item Variants

Column Name		Format	Description
Primary Variant	<input type="checkbox"/> Required <input type="checkbox"/> YES / NO		Unique to each item. Also used to identify if a variant belongs to an item.
Variant Type	<input type="checkbox"/> Required <input type="text"/> Text		The name of the variant type. Ex: "Color"
Variant Name	<input type="checkbox"/> Required <input type="text"/> Text		The main title of the item.
Variant Images	<input type="text"/> Text	<ul style="list-style-type: none"> <li>Comma Separated Image URLs</li> </ul>	Images for the variant item. If the "Unique Item Images" (above) is set to "NO", ignore this column.
Variant Price	<input type="checkbox"/> Required <input type="text"/> Decimal		The price for the item variant.
Variant Total Inventory	<input type="text"/> Integer		Available inventory for this variant across all locations.
Variant Location Inventory	<input type="text"/> Text	<ul style="list-style-type: none"> <li>Semicolon separated location handles</li> <li>Colon after the location handle</li> <li>Ex: summit: 3; montclair: 11</li> </ul>	Available inventory for this variant broken out by location.
Variant Shipping Weight (lbs.)	<input type="text"/> Decimal		Defaults to 1 lb. if empty.
Variant Shipping Length (in.)	<input type="text"/> Decimal		Defaults to 12in. if empty.
Variant Shipping Width (in.)	<input type="text"/> Decimal		Defaults to 12in. if empty.
Variant Shipping Height (in.)	<input type="text"/> Decimal		Defaults to 12in. if empty.
Variant UPC	<input type="text"/> Text		The UPC code of the variant.
Variant SKU	<input type="text"/> Text		The SKU of the variant.
Variant Brand ID	<input type="text"/> Text		If a vendor has an ID associated with themselves.
Variant Low Stock Alert	<input type="text"/> Integer		The threshold where a variant will be considered low on inventory.

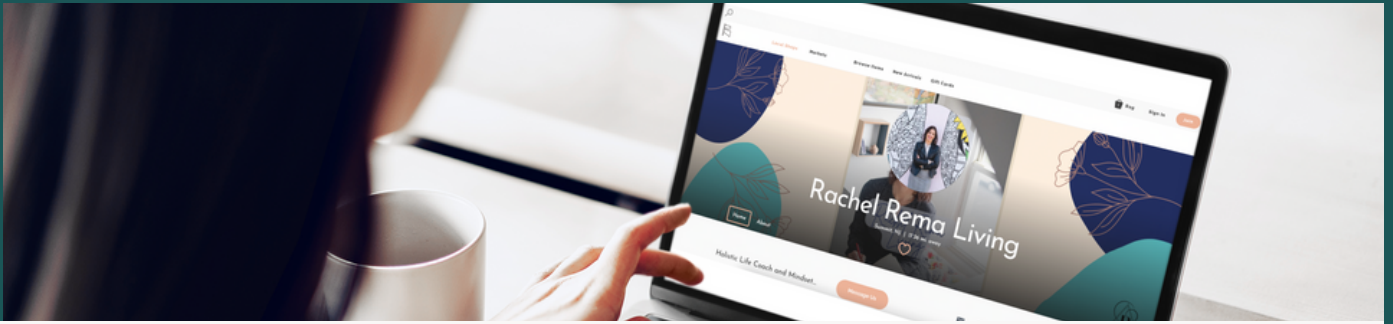
## Extra Data

Column Name		Format	Description
Data – Approved	<input type="button" value="Read Only"/> <input type="button" value="YES / NO"/>		If the item is approved or rejected.
Data – Date Created	<input type="button" value="Read Only"/>		Date and time the item was created as a new item.
Data – Date First Activated	<input type="button" value="Read Only"/>		Date and time the item was first made live.
Data – Date Last Activated	<input type="button" value="Read Only"/>		Date and time the item was last made live.
Data – Category ID	<input type="button" value="Read Only"/>		The ID associated with the category assigned to the item.
Data – Location IDs	<input type="button" value="Read Only"/>		The IDs of the store locations for the item.
Data – Brand ID	<input type="button" value="Read Only"/>		The ID associated with the brand assigned to the item.
Data – Attribute IDs	<input type="button" value="Read Only"/>		The IDs of things like tags assigned to the item.

## Correcting Errors

If a column is missing the import will fail. Please use the import template as a guide toward the correct column structure.

If any cell is not formatted correctly, the system will allow you to proceed to the preview stage. Errors will be marked with a red box. You can correct cells by clicking on them and correcting values there.



## *Video Tutorial*

For video instructions, click the link below for a full walkthrough with our Beyond Main team.

[WATCH NOW](#)



## **Contact Support**

Need help or have questions? Click the link below to contact our support team for assistance in setting up your shop.

[LET'S CHAT](#)

# Join the Conversation



Join our Small Business Facebook Group! it is a space for small businesses to share ideas, ask questions, give support, get answers to your burning questions, and help each other grow.



JOIN NOW