

One-time account setup to finish after your first store is built. Work down the list and check each box as you go. Once these are done, you won't need to touch them again.

Core Setup RECOMMENDED FOR EVERY DEALER

- ☐ **Check Default Dealer & Store Settings**
Review your account defaults so every new store starts with the right info and options.
- ☐ **Upgrade Branding**
Turn on advanced branding display options for a more polished, custom storefront look. [See more →](#)
- ☐ **Organization Auto-Emails On**
Turn on launch, reminder, and abandoned-cart emails so contacts stay in the loop. [See more →](#)
- ☐ **Set Up Your Shipping Options**
Choose how you charge shipping at checkout.

Flat Rates
Go to **Account Settings > Shipping Methods > Add New Method (+)**, or edit an existing flat rate.

Tiered Shipping
Charge different rates based on order total. [See more →](#)

Real-Time Rates with ShipStation
Calculate shipping at checkout by weight. Requires a ShipStation account. [See more →](#)

Fulfillment Services OPTIONAL INTEGRATED PARTNERS • SET UP BEFORE LAUNCH

- ☐ **ShipStation**
Push closed-store orders straight into ShipStation for bulk labels, with tracking sent back to Chipply automatically. [See more →](#)
- ☐ **Fulfill Engine**
Route decorated-item orders through the Fulfill Engine integration. [See more →](#)
- ☐ **Fast Platform**
Connect the Fast platform workflow for outsourced fulfillment. [See more →](#)
- ☐ **Vantage**
Purchase decorated items through the Vantage integration. [See more →](#)

Purchasing SET UP WHEN YOU'RE READY TO ORDER

- ☐ **Live Vendor Inventory & One-Click Ordering**
Connect your accounts with Chipply's Integrated Purchasing Vendors to check stock, decide on backorders or substitutions, and keep your POs, Work Orders, Sorting Lists, and Packing Slips accurate. Order blank goods right inside Chipply, so you skip re-entering info and avoid mistakes like wrong style numbers. [See more →](#)

Management Software OPTIONAL INTEGRATION (ASK US ABOUT CHIPPLY PRODUCTION)

- ☐ **Shop Management Integration**
Sync your Chipply orders into your shop management system for production. See setup for [Printavo →](#) or [ShopWorks →](#)
- ☐ **ERP Integration**
Connect Chipply to select ERP and business management systems so orders flow into the tools you already use. See the full list in **Dealer Settings > Integrations**.

Level Up ONGOING TIME-SAVERS

- ☐ **Store & Product Templates**
Save a finished store as a template so future builds start from a copy, or bulk-add suggested product groups to any store. [See more →](#)
- ☐ **Requestor Stores**
Give customers a personalized catalog to browse, add items, and submit their cart as a store request. [See more →](#)
- ☐ **Bulk Actions**
Update display artwork and settings across many products at once instead of one by one. [See more →](#)
- ☐ **Reporting**
Track sales and store performance at a glance with Chipply's reporting tools. [See more →](#)

From setup to success, we've got you

Work through these at your own pace. Each one makes building and running your stores easier.