



PLANN

YOUR ULTIMATE CHEAT SHEET

SETTING UP SOCIALS FOR SHOPPING

Shopping

Introduction

SHOPPING ON SOCIAL MEDIA



You probably already know that your social media channels are a great opportunity to attract new potential customers.

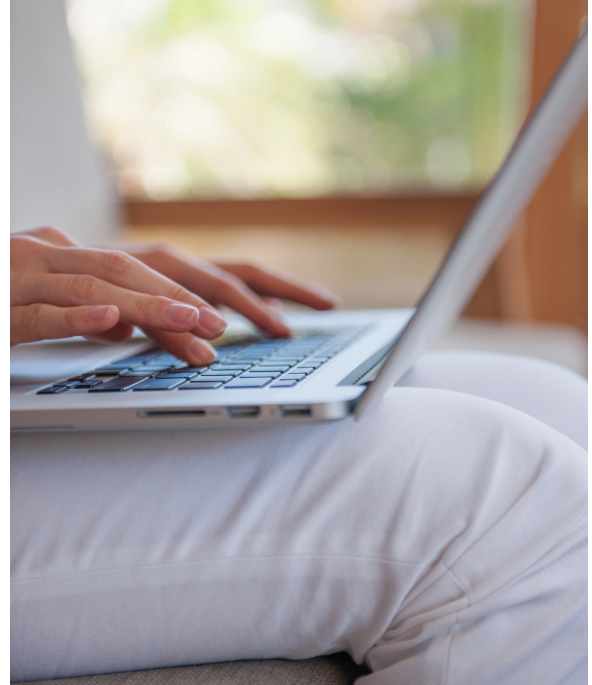
But, here's something even cooler: you can actually set up your channels so that they can buy from you without even having to leave the platform!

Facebook, Instagram and Pinterest now all have their own in-built e-commerce features to help you skyrocket your conversions. Meaning: you can make sales straight from your social media!

That said, setting these shopping features can seem a little bit tricky and overwhelming when you first look into it. You might find yourself wondering whether you've set it up properly, or whether you've even been accepted!

Never fear, we've got you sorted with this handy cheat sheet. Tick off the steps as you go to make sure you're properly set up on each platform, and you'll be ready to make sales via your socials in no time!

TIP: PRINT OUT THIS GUIDE, SO YOU CAN CHECK OFF THE LIST AS YOU GO!



**STAY IN TOUCH
THROUGH INSTAGRAM**

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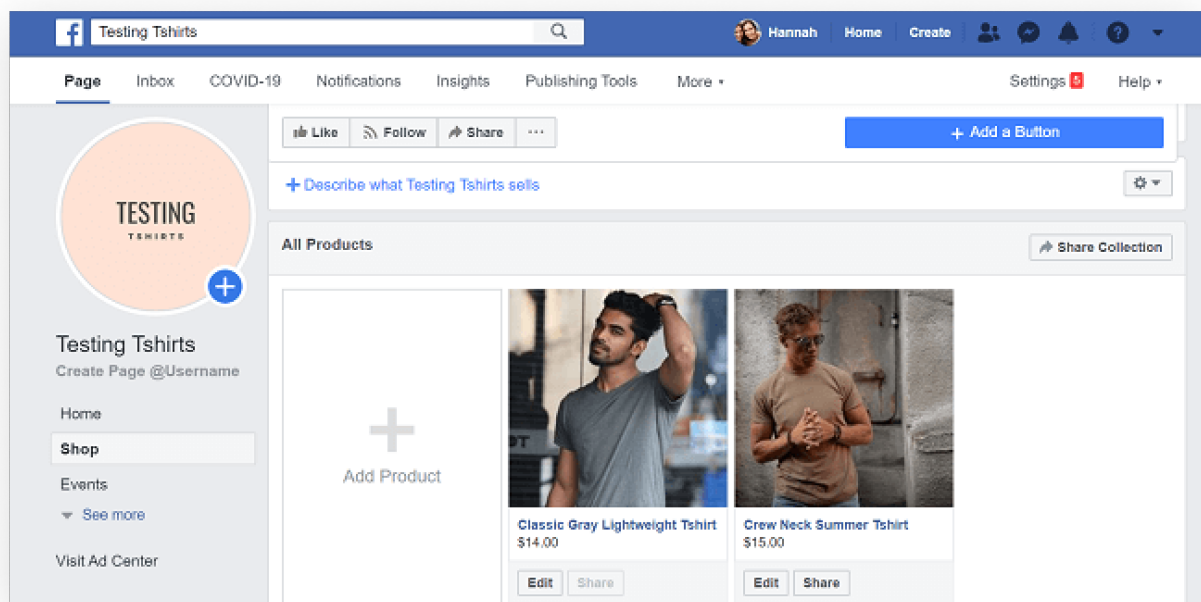
1. Facebook Shopping
2. Instagram Shopping
3. Pinterest Product Pins

**READY TO SMASH YOUR
SALES VIA SOCIALS?**

Facebook SHOPPING



Facebook's shopping features are so advanced that you barely even need a website to sell products anymore — your Facebook business page can function as its own mini storefront. Here's how to get it set up.



STEP 1: SET UP A BUSINESS FACEBOOK PAGE

In order to use Facebook shopping, you'll need a business Facebook page. Here's how to set it up

- ☐ Go to business.facebook.com or navigate to Business Suite and click on the 'Create Account' button.
- ☐ Follow the account set-up prompts. You'll need to enter your business details like address, phone number and website.
- ☐ Specify if you're using Business Manager to promote your business or to provide a service (e.g. Facebook Ads Manager).
- ☐ From your Business Manager dashboard, look for the 'Accounts' section on the left-hand side and click on 'Pages'
- ☐ A second column will appear called 'Pages'. Click on the '+ Add' button.
- ☐ Pick from the three options: Add a page you already own, request access to someone else's page or create a new page.

STEP 2: SET UP FACEBOOK COMMERCE MANAGER

Next, you'll need to connect your Facebook business page to the Commerce manager

- ☐ Go to the '[Create Your Shop](#)' page on Facebook. Then, in the 'Choose A Way to Sell section' select 'Create a Shop' and click 'Get Started'
- ☐ In the 'Assets' section, click on your shop to upgrade, or click 'Create a Shop'
- ☐ In the 'Start Setting Up Your Shop section', select your website and click 'Get Started'
- ☐ In the 'Choose Your Business' section, you'll see a list of Facebook Pages you're a Page admin on. Select the business you'd like to add your shop to. Then, click 'Next'
- ☐ In the Account Details section, provide an Account Name and select a Business Account. Then, click 'Next'
- ☐ In the 'Where People Can View Your Shop' section, select where you'd like to create your shop. If you have an Instagram business profile and a Facebook Page, you can select both
- ☐ In the 'Catalog' section, select an existing catalogue or create a new one and click 'Next'
- ☐ Look over your shop details, review and agree to the Seller Performance and Accountability Policies and click Create Your Shop.



PLANN POINTER:

Need help getting more eyes on your Facebook business page? Check out our content prompts in Plann to help get you started with thoughtful and intentional content

STEP 3: CREATE YOUR COLLECTIONS

In order to help customers find the products they're looking for on your profile, it's a great idea to set up collections. Here's how to do it:



Log into [Commerce Manager](#) and select 'Shops'



Click 'Edit', then 'Add New.' Select 'Collection' then create 'New Collection' and click 'Confirm'

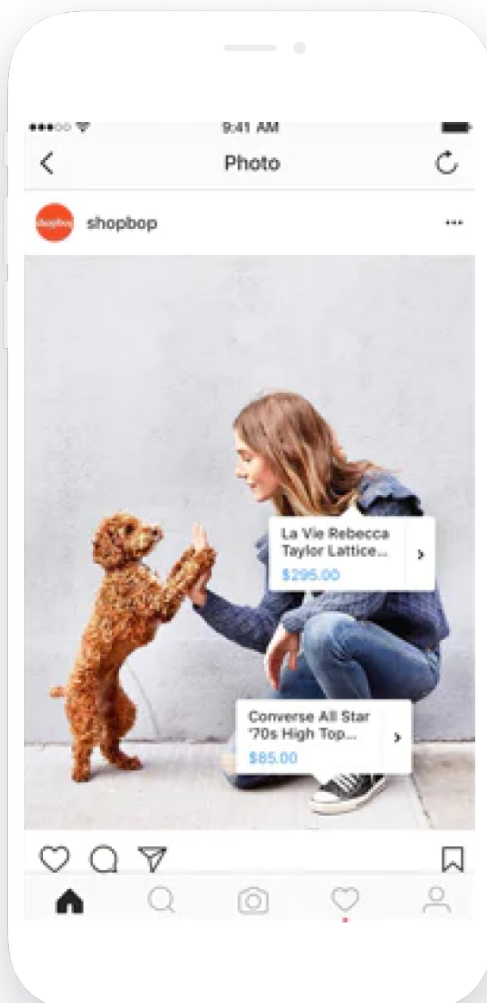


Give your collections a name and select the products you'd like to include. When you're finished, click 'Publish' and this will show up on your business page. Boom, you're ready to sell!

Instagram SHOPPING



Shopping is still relatively new on Instagram, but is a huge focus for the platform right now. With shoppable features now supported on feed posts, stories, IGTV and Reels, now is the time to get on board if you haven't already! Here's how to get it up and running



STEP 1: CHECK THAT YOU'RE ELIGIBLE

Before you apply for your account, make sure you've done the following

- ☐ Download the latest version of Instagram
- ☐ Convert your account to a Business Profile if it's not already
- ☐ Ensure you're an admin on a Page or Business Manager account
- ☐ Make sure you meet the requirements
 - Comply with Facebook's terms of services
 - The products must be hosted on a website owned by you
 - Be in a supported market (you can see them [here](#)).
 - Demonstrate an established and authentic presence on social media
- ☐ Create a shop with Commerce Manager within Facebook Business Manager, using the instructions above. You can also connect your shop from an existing platform like Shopify or WooCommerce. If this is you, you can skip to step 3
- ☐ Add your products to your Facebook shop inventory

PLANN POINTER:

You can plan and schedule both your Instagram feed posts and stories in Plann, so that you're drawing attention to your shoppable posts with strategic and value-packed content!

STEP 2: CONNECT YOUR INSTAGRAM TO FACEBOOK CATALOG MANAGER

Once you complete all the admin in Step 1, you need to connect your Instagram account to your Facebook catalogue.



Go to your business's Instagram profile and select 'Edit profile'



Under the 'Public business information' section, select 'Page' and choose a Facebook Page from your Pages that you'd like to connect.

***Note: A Facebook Page Shop is not required, only a Facebook Page.**

STEP 3: SIGN UP FOR INSTAGRAM SHOPPING



Open the Instagram app and go to your profile page. Tap on 'Settings' and select 'Business'



A new page will load, and you will see an option that says 'Set Up Instagram Shopping'



Tap on it and follow the prompts to submit your profile for review. You will also need to add your website URL here

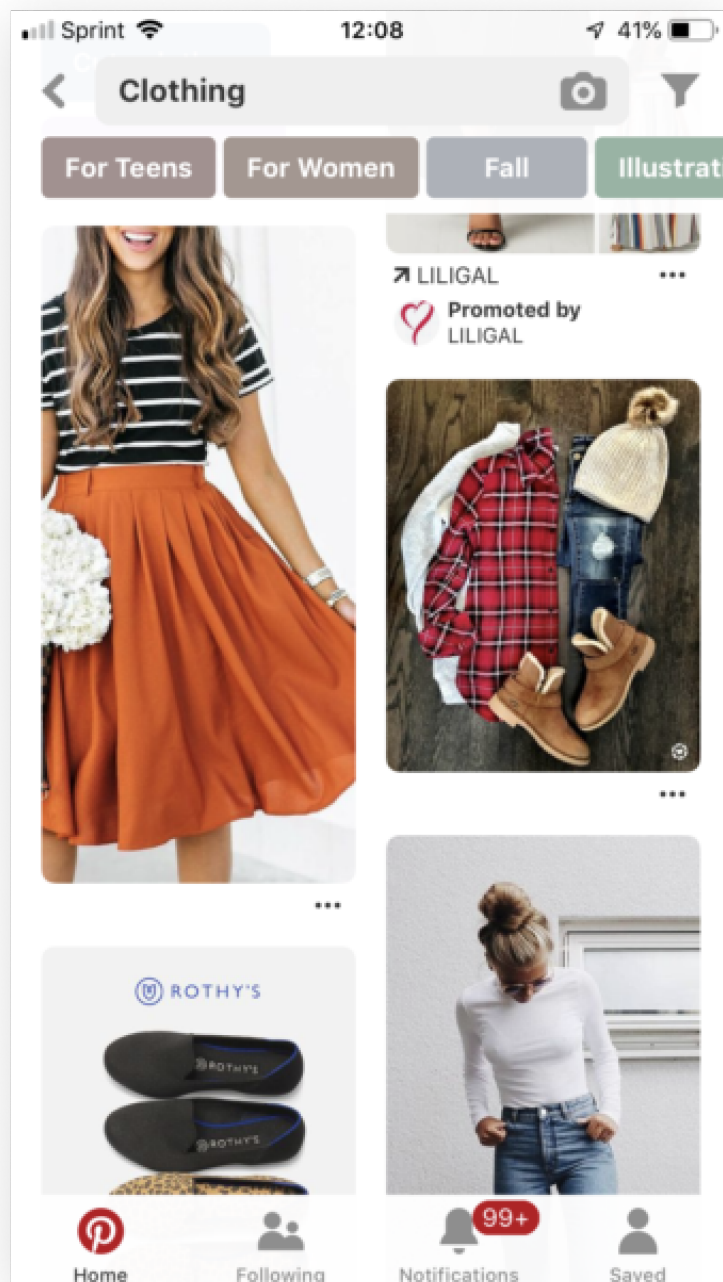


Once you're all approved, start using the app's shopping features, including tagging your products in your grid posts, story stickers, Reels videos and IGTV!

Pinterest's Product Pins



On Pinterest, items from your online store can be promoted through 'product pins.' These can be both pinned organically, or used to create ads on Pinterest. Here, we'll guide you through how to set these up.



STEP 1: GET YOUR CATALOGUES READY



Make sure you're eligible for Pinterest catalogues. The requirements include:

- A Pinterest business account
- A claimed website
- A website that meets Pinterest's [merchant guidelines](#), including accurate information and eligible products hosted on your website
- A data source ie. a file that contains a list of products hosted on your website (this may be called a product catalogue or product feed)



Set up your Pinterest tag

This is a piece of JavaScript code you put on your website to gather conversion insights and build audiences to target based on actions they've taken on your site. You can find more info on setting this up [here](#).

STEP 2: ADD IN YOUR DATA SOURCE



In the ads drop-down menu, go to 'Catalogues' which will open in a new window. From there, select 'Get started', then 'Add data source'



When prompted, input your data source URL. This is a link to the location from where Pinterest will be able to fetch your data source. This URL must start with http://, https://, ftp:// or sftp://, and include the full filepath



Select your file format. The options are CSV, TSV or XM



Select 'My data source is password protected' if your data source requires credentials. If necessary, input your credentials



Select your currency, then click 'Create pins.' This will take you back to the main Data Source page. Your feed will need to be processed (which happens every 24 hours), so you will need to wait for a confirmation email from Pinterest about the status of your data source submission.

***Note, you can find more info on adding your data source [here](#).**

STEP 3: CREATE YOUR PRODUCT PINS AND GROUPS

Once approved, Pinterest will pull through the info from your catalogue to create 'product pins.' These show information about your product (including pricing info, availability, product title and description) and link to the landing page where your audience can purchase it. These can then show up in search results for that type of product (for example, black dresses), as well as on your own Pinterest profile. Here's how to get your product posts seen



Pin your product pins to public group boards. For example, if you sell women's blazers, you could save them to boards about workwear inspiration.



Set up boards on your own Pinterest profile where you can showcase your product pins. For example, if you sell candles, you could make a board for self-care products



Set up product groups to maximise the searchability of your products. Go to the 'Ads' drop-down and select 'Catalogues' Then, select 'Product groups' and click 'Create' Filter products by selecting options under the 'Category' and 'Product type' drop-downs (you can select as many as you like in either drop-down). Give the filters a name and save the product group.

Ready?

PLANN YOUR CONTENT

Now that you're all set up on your shopping platforms, it's time to start planning out some valuable and impactful content to warm up your audience. After all, a 'cold' audience rarely buys!

Download or [log into Plann](#) to [start planning and posting your sales-skyrocketing content today.](#)

