# Shopify Launch Checklist

Version 1 · 72 items · PDF and CSV (opens in Google Sheets) · Monastic Media

**How to use it.** Work top to bottom before the first ad goes live; every "must" needs a tick. The CSV has the same checks with status and notes columns for your team.

## Meta Pixel and Conversions API

| | Check | How to verify | Owner |
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| ☐ | **Install the Facebook and Instagram sales channel and connect it to your own business portfolio, ad account, Page, Instagram account and pixel.** must<br>If the channel links to an old test pixel or a personal ad account, every launch-day event lands in the wrong place and campaigns optimise on nothing. | In Shopify admin, open Sales channels > Facebook and Instagram > Settings (menu names may differ). Match the business portfolio, ad account and pixel ID shown there against Meta Business Settings > Data sources > Datasets. | founder |
| ☐ | **Set customer data sharing in the Facebook and Instagram channel to the highest level offered (labelled Maximum at the time of writing) so Conversions API is on.** must<br>At lower levels only the browser pixel sends events. Ad blockers, in-app browsers and Safari limits then drop some add-to-carts and purchases, and Meta optimises on a smaller, skewed set of buyers. | In Sales channels > Facebook and Instagram > Settings > Data sharing (menu names may differ), confirm the top level is selected. A day later, in Events Manager > Overview, Purchase should show both Browser and Server as connection methods. | marketer |
| ☐ | **Verify your primary store domain (the custom .com or .in, not the myshopify.com address) in Meta Business Settings using a DNS TXT record or the meta-tag method.** must<br>Without a verified domain you cannot prove you own the link in your ads. Teammates or agencies may also be blocked from editing link previews and from setting up web event configuration. | In Meta Business Settings, look under Brand safety > Domains (menu names may differ). Your domain should show a green Verified status. If you used the DNS method, also check that the TXT record is still present in your domain registrar's DNS panel. | developer |

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| ☐ | **Check whether Events Manager still shows an Aggregated Event Measurement or web event configuration screen for your domain. If it does, put Purchase at the top of the list.** should<br>Meta has been phasing out the old ranking of 8 events, so newer accounts may not see this screen at all. If your account still has it and Purchase is not ranked first, iPhone users who opted out of tracking may not count as purchases. | In Meta Events Manager, open your pixel and look for Aggregated Event Measurement or Configure web events, usually under Settings (menu names may differ). If the screen is missing, write 'not applicable' in your launch notes with today's date. If it is there, confirm Purchase sits at priority 1. | marketer |
| ☐ | **Remove duplicate pixels: hard-coded fbq snippets in theme.liquid, extra custom pixels under Customer events, and apps that fire the same pixel ID.** must<br>Two installs of one pixel send every PageView and Purchase twice. The doubles inflate reported sales and give Meta a wrong picture of your buyers. | In Settings > Customer events (menu names may differ), keep only the channel's Meta pixel. Search theme.liquid for 'fbq(' under Online Store > Themes > Edit code. Load a product page with Meta Pixel Helper: your pixel ID should show once, with one PageView. | developer |
| ☐ | **Review Shopify's customer privacy and cookie banner settings so Indian visitors are not blocked from tracking by a region rule you never meant to switch on.** must<br>A banner that needs consent before tracking holds the pixel back until a shopper taps Accept, and most ad clicks leave without tapping. Settle your consent approach under India's data law with a legal adviser. | In Settings > Customer privacy (menu names may differ), read which regions the banner and data limits cover. Open the store in a private window on Indian mobile data and check whether Pixel Helper shows PageView before you tap anything. | founder |
| ☐ | **Confirm the pixel and ad account are owned by your business portfolio, not by a freelancer's or agency's portfolio, and give admin access to at least two people from your own team.** must<br>If the only admin leaves or the agency portfolio gets restricted, you lose the pixel along with its event history and audiences. You would have to start learning again from zero. | In Meta Business Settings, go to Data sources > Datasets/Pixels (menu names may differ), select your pixel and check the owner name shown. Under People, confirm two of your own team members have full control. Partners should be listed under Partners with only the access they need. | founder |

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| ☐ | **Make email or mobile number a required checkout field, then read the Event Match Quality score for Purchase and AddToCart in Events Manager.** should<br>Conversions API matches orders to Meta users through details like phone and email. If checkout collects neither, many orders cannot be credited to an ad and retargeting audiences stay thin. | In Settings > Checkout (menu names may differ), confirm phone or email is required. After a few days of traffic, open Events Manager > Overview, click Purchase and read its Event Match Quality and the customer parameters received. | marketer |

## Standard events and deduplication

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| ☐ | **Confirm PageView fires once on every page type: home, collection, product, cart, checkout and the order thank-you page.** must<br>PageView is the base for website retargeting audiences and the check that the pixel loads at all. A page type that does not fire it leaves a hole in every audience built on site visits. | In Meta Events Manager, open your pixel > Test events and enter your store URL to open it. Visit each page type in turn. The live list should add one PageView per page, with no doubles marked Browser twice. | developer |
| ☐ | **Confirm ViewContent fires on every product page and sends a content_ids value that matches that product's ID in your Meta catalogue.** must<br>Dynamic product ads show each shopper the exact item they viewed by matching content_ids to catalogue IDs. If the two don't match, retargeting falls back to generic ads or does not run. | In Events Manager > Test events, open two different product pages. Click each ViewContent event, expand the parameters and copy the content_ids value. Search that ID in Commerce Manager > Catalogue > Items. It should return the same product or variant. | developer |
| ☐ | **Test AddToCart from every add button on the store: main product button, sticky mobile bar, quick-add on collection pages and any cart drawer upsell.** must<br>Themes and upsell apps often add items through their own code and never send the event. AddToCart then looks weak, and any campaign optimising for it learns from half the picture. | With Events Manager > Test events open, tap each add button once in a phone-sized browser window. Each tap should log exactly one AddToCart carrying the right content_ids, a value and the store's currency code. | developer |

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| ☐ | **Confirm InitiateCheckout fires once on every route into checkout: cart page, Buy now button, express wallet buttons and any third-party COD or one-click checkout app.** must<br>Many Indian stores swap the native checkout for an outside checkout app. If that app does not send its own events to your pixel, everything from checkout onward goes missing, Purchase included. | In Events Manager > Test events, start checkout from the cart, a Buy now button and your checkout app's button. Each route should log one InitiateCheckout. If an outside checkout app is installed, confirm your pixel ID is entered in its settings. | developer |
| ☐ | **Find out whether AddPaymentInfo fires for each payment route you offer (UPI, cards, wallets, COD) and write down which routes send it.** should<br>UPI intent flows and COD often skip the step where this event is triggered. If it fires on only some routes, do not use it as an optimisation event or read it as a drop-off signal. | In Events Manager > Test events, run test checkouts with each payment method up to the payment step. Note which ones log AddPaymentInfo. Record the result in your launch notes so the media buyer knows what this number covers. | marketer |
| ☐ | **Confirm Purchase fires exactly once per order for both prepaid and COD orders, and does not fire again when the shopper reloads or reopens the order status page.** must<br>A missing COD Purchase hides your largest order type from Meta. A second Purchase on reload doubles reported sales. Either one sends budget decisions in the wrong direction. | Place one prepaid and one COD test order with Events Manager > Test events open. Each should log one Purchase from Browser and one from Server. Reload the thank-you page and open the order status link from the confirmation email. No new Purchase should appear. | developer |
| ☐ | **Confirm browser and server copies of Purchase, AddToCart and InitiateCheckout carry the same event name and the same event_id, so Meta can deduplicate them.** must<br>Without a shared event_id, one sale is counted twice, once from the browser and once from the server. Your purchase count and cost per purchase in ad reports then stop meaning anything. | Place one test order with Events Manager > Test events open. Open the browser Purchase and the server Purchase from that order: the event_id values should match. In the pixel's event details, look for a note that events are being deduplicated. | developer |

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