Undercurrents

RESOURCE · SHOPIFY

The Monday Shopify Dashboard

When your shop is only just starting to make sales, paying for another app can be hard to justify. But you still want to understand what's happening in your store and where to put your effort next.

Online version, with every prompt ready to copy:
undercurrents.ch →

PREFER TO COPY AND PASTE?

Every prompt in this guide is also in the online version, ready to copy, with your shop's details filled in for you. **undercurrents.ch →**

This guide walks you through a weekly check using Claude (or ChatGPT, if that's what you use) and your Shopify data: **six numbers on one page, up to three suggested actions, and one priority for the week.**

The AI helps bring the figures together and suggests what might need attention. You decide what makes sense for your business.

Set aside an hour on Monday to review the numbers, understand what's changed, and decide what you'll do about it. The point is to build a habit of checking in on your business, not just checking your sales.

We'll set up the basics below, so you have something to come back to each week without paying for a separate analytics tool or maintaining another spreadsheet.

[BRAND NAME]

Monday Dashboard

Last week: **Mon 19 – Sun 25 Oct 2026**
vs previous: Mon 12 – Sun 18 Oct 2026
Store timezone: CET · Currency: EUR

Net sales
€612.40
↑ +15.2%
Previous week: €531.80

Orders
17
↑ +21.4%
Previous week: 14

Conversion rate · served countries*
1.35%
↑ +0.09 pp
Previous week: 1.26% · 1,184 vs 1,032 sessions

Average order value
€36.02
↓ −5.2%
Previous week: €37.99

Returning customer rate
31.3%
↑ +9.9 pp
Previous week: 21.4% · 5 of 16 customers

Top 3 products by net sales

#	PRODUCT	LAST WK	PREV
1	Kyoto Sencha	€148.50	€96.00
2	Earl Grey Lavender	€118.80	€126.40
3	Chamomile Blend	€86.40	€52.20

THIS WEEK'S PRIORITY

Lift order value: more people bought, but each spent a little less.

Orders rose from 14 to 17 while average order value slipped from €37.99 to €36.02.

WHAT TO DO THIS WEEK

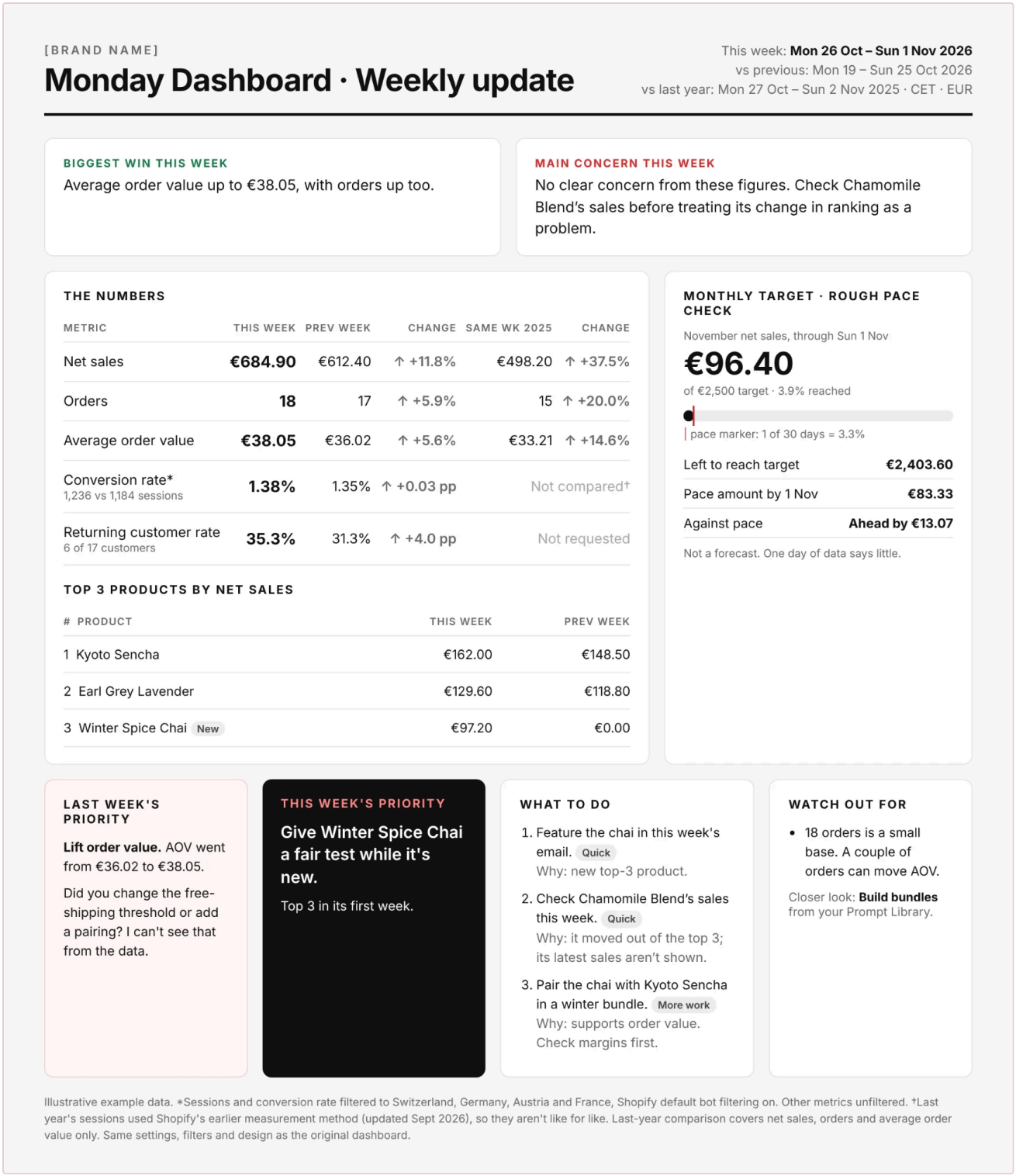
1. Look at last week's smallest orders and what was in them. Quick
   Why: AOV fell while orders grew.
2. Compare your free-shipping threshold with the €36 average basket. More work
   Why: a threshold just above it could encourage a second item.
3. Suggest a second tea on the Kyoto Sencha page. More work
   Why: it's the top seller and grew most. Page not reviewed here.

WATCH OUT FOR

- With 16 customers, one returning buyer moves the rate by about 6 pp. Give it a few weeks before drawing conclusions.
- Earl Grey Lavender dipped slightly. Check stock before assuming demand has changed.

Illustrative example data. *Conversion rate and sessions filtered to Switzerland, Germany, Austria and France, Shopify default bot filtering on. Other metrics unfiltered. Both weeks fall after Shopify's Sept 2026 session-measurement update, so they compare like for like. Returning customer rate = share of customers, not orders.

Illustrative example data, not a real store.



[BRAND NAME]

Monday Dashboard · Weekly update

This week: **Mon 26 Oct – Sun 1 Nov 2026**
vs previous: Mon 19 – Sun 25 Oct 2026
vs last year: Mon 27 Oct – Sun 2 Nov 2025 · CET · EUR

BIGGEST WIN THIS WEEK
Average order value up to €38.05, with orders up too.

MAIN CONCERN THIS WEEK
No clear concern from these figures. Check Chamomile Blend's sales before treating its change in ranking as a problem.

THE NUMBERS

METRIC	THIS WEEK	PREV WEEK	CHANGE	SAME WK 2025	CHANGE
Net sales	**€684.90**	€612.40	↑ +11.8%	€498.20	↑ +37.5%
Orders	**18**	17	↑ +5.9%	15	↑ +20.0%
Average order value	**€38.05**	€36.02	↑ +5.6%	€33.21	↑ +14.6%
Conversion rate* 1,236 vs 1,184 sessions	**1.38%**	1.35%	↑ +0.03 pp	Not compared†	
Returning customer rate 6 of 17 customers	**35.3%**	31.3%	↑ +4.0 pp	Not requested	

TOP 3 PRODUCTS BY NET SALES

#	PRODUCT	THIS WEEK	PREV WEEK
1	Kyoto Sencha	€162.00	€148.50
2	Earl Grey Lavender	€129.60	€118.80
3	Winter Spice Chai New	€97.20	€0.00

MONTHLY TARGET · ROUGH PACE CHECK

November net sales, through Sun 1 Nov

€96.40

of €2,500 target · 3.9% reached

pace marker: 1 of 30 days = 3.3%

Left to reach target	**€2,403.60**
Pace amount by 1 Nov	**€83.33**
Against pace	**Ahead by €13.07**

Not a forecast. One day of data says little.

LAST WEEK'S PRIORITY

Lift order value. AOV went from €36.02 to €38.05.

Did you change the free-shipping threshold or add a pairing? I can't see that from the data.

THIS WEEK'S PRIORITY

Give Winter Spice Chai a fair test while it's new.

Top 3 in its first week.

WHAT TO DO

1. Feature the chai in this week's email. Quick
   Why: new top-3 product.
2. Check Chamomile Blend's sales this week. Quick
   Why: it moved out of the top 3; its latest sales aren't shown.
3. Pair the chai with Kyoto Sencha in a winter bundle. More work
   Why: supports order value. Check margins first.

WATCH OUT FOR

- 18 orders is a small base. A couple of orders can move AOV.

Closer look: **Build bundles** from your Prompt Library.

Illustrative example data. *Sessions and conversion rate filtered to Switzerland, Germany, Austria and France, Shopify default bot filtering on. Other metrics unfiltered. †Last year's sessions used Shopify's earlier measurement method (updated Sept 2026), so they aren't like for like. Last-year comparison covers net sales, orders and average order value only. Same settings, filters and design as the original dashboard.

Illustrative example data, not a real store.

What you need

Start with your Shopify data. Once you're comfortable with the weekly check, you can add Google search data if you want to understand more about how people find your store. You don't need to set everything up at once.

LEVEL 1 · START HERE

Your Shopify numbers

- ✓ A Claude account, or ChatGPT if that's what you use
- ✓ Access to your Shopify store
- ✓ A way to share your Shopify data with your chosen tool

LEVEL 2 · WHEN YOU'RE READY

Your Google search data

- ✓ Everything from Level 1
- ✓ Google Search Console set up for your store
- ✓ A Google Sheet
- ✓ The Google Drive connector in Claude

The instructions below use Claude. We'll go through the connection step by step. If you use ChatGPT, the prompts can serve as a starting point, but the connection and setup steps will differ.

Level 2 adds context about how people find your store: what they search for, which pages appear in the results, and which get clicked. If Instagram is your main source of traffic, you can leave this part for later. Start with the questions that matter to your shop rather than connecting everything because it's there.

Do you need a paid Claude account?

I think a paid account can be a worthwhile investment once you know how to use it. Beyond this weekly check, you can use it to work on email copy, product descriptions, and other tasks that take up a surprising amount of your week. There are plenty of tutorials online to help you get started.

But if you're still unsure, start with the free plan and see how it fits into your work. It includes Projects and connectors, though usage limits mean you may need to split larger tasks into smaller requests.

You can review your figures in a conversation without using a dedicated dashboard feature. Creating an interactive HTML version will depend on the features and limits available in your account.

If you regularly reach those limits, you can decide whether upgrading is worth it. Check Claude's pricing page for the current plans and price in your country.

Six numbers, one priority

These numbers help you work out where to focus, but what needs doing will vary. Sometimes it's a small change to your store. Other times, you might need to revisit a product page, the emails leading people to it, or the product photos themselves. One priority can involve several tasks.

Net sales	Sales after discounts and returns, not profit
Orders	How many orders were placed
Conversion rate	The proportion of store sessions that resulted in a purchase
Average order value	The average amount spent per order
Top three products by net sales	Which products brought in the most net sales, rather than sold the most units
Returning customer rate	The share of customers who have bought from you before
This week's priority	What you'll focus on first. Your decision, informed by the review.

ALL SIX NUMBERS COME FROM SHOPIFY

For this check, Shopify is the source for your sales figures. Claude or ChatGPT helps you review them; it isn't a separate source of data.

If another tool shows a different figure, don't spend the whole hour trying to make the dashboards agree. Note the difference, check that you're comparing the same dates and definitions, and keep your weekly review consistent.

The priority is yours to choose. The AI can suggest actions, but it doesn't know everything else happening in your business, or how much you already have on your plate.

A quick word about bots

Not everyone visiting your store is a potential customer. Some visits come from automated bots rather than people browsing your products.

Shopify filters out the bots it can identify by default. That doesn't mean every remaining visit is human, so an unusual spike is still worth investigating before drawing conclusions.

For this weekly check, you can also focus on the countries you sell to. If you only deliver locally, you may want to narrow that further to your delivery area, where the reporting allows it. The question is: *how well is your store converting visitors from the places you actually serve?*

GOOD TO KNOW

Filtering by location isn't bot filtering. Someone visiting from a country you don't ship to may still be a real person.

The prompts below ask where you sell so you can use the same scope each week. If your figures differ from another Shopify view, check the dates and filters before comparing them.

A note on comparisons

Shopify changed how it measures visits between **21 and 23 September 2026**. If your conversion rate suddenly changed around then, the update could be part of the explanation, not necessarily something you did in your store.

Use the period after the update as your new starting point for sessions and conversion rate. Comparisons with earlier periods, including last year, won't be like for like. Total sales, orders, and customer counts weren't affected by the update, so you can still compare those as usual.

You can find the details in Shopify's explanation of the session measurement update.

Setting it up

Give yourself twenty minutes and a coffee or tea. This is the initial setup; after that, you'll have something to come back to each Monday.

STEP 1

1 Create a Project in Claude

Call it something like "Monday Dashboard." Keep your dashboard conversations and files here so they're easy to find next week.

STEP 2

2 Connect Shopify

QUICKEST

Open the Shopify connector page and click **Add to Claude**. Log in to your store when it asks.

FROM THE APP

Click your name at the bottom left, open **Settings**, then **Connectors**. Open the Discover tab, search for "Shopify" and click Connect.

Check the permissions. Review the permissions before approving access. The connector can also make changes to your store, so don't assume it's read-only.

Rather not connect your store?

You can upload Shopify report exports instead. Remove personal information you don't need to share, including names, emails, and addresses.

An orders export alone won't provide every metric in this guide. You may need separate reports for sessions, conversion rate, and customer metrics. Ask Claude to identify what's missing rather than calculate a substitute without telling you.

You'll also need to upload fresh exports each week.

STEP 3

3 Build your dashboard

Inside the Project, paste the setup prompt below and fill in the details in brackets.

For this exercise, ask Claude to retrieve and analyse your data only, without making changes to your store. That instruction sets the scope of the task; it doesn't change the permissions you granted when connecting.

Your setup prompt

BEFORE YOU PASTE THE PROMPT

Replace the text in square brackets with your own details. For example, change [STORE NAME] to your store's name. Remove the brackets too.

SETUP PROMPT · PASTE ONCE Copy it from the online version →

Create a one-page weekly dashboard for my Shopify store. I'll use it during an hour each Monday to review performance and decide what to work on next.

ABOUT MY STORE

- Store name: **[STORE NAME]**
- What I sell: **[SHORT DESCRIPTION]**
- Countries or regions I serve: **[COUNTRIES OR REGIONS]**
- Currency: **[CURRENCY]**
- Relevant context for this week: **[PROMOTION, PRODUCT LAUNCH, STOCK ISSUES, HOLIDAY, OR "NONE"]**

BEFORE YOU START

Check which Shopify data you can access. If a metric or filter isn't available, tell me. Don't substitute a different metric without explaining the difference.

Retrieve and analyse data only. Do not make changes to my store.

THE REPORTING PERIOD

Compare the last complete week, Monday to Sunday, with the previous Monday to Sunday, using my store's timezone.

Show the exact dates and timezone at the top.

THE NUMBERS

Use Shopify's reported metrics and definitions wherever available:

- Net sales
- Orders
- Conversion rate
- Average order value
- Top 3 products by net sales
- Returning customer rate

For each metric, show:

- Last week's value
- The previous week's value
- The change

Use percentage-point changes for rates and percentage changes for sales, orders and average order value.

If the previous value was zero, don't calculate a percentage change.

For the top 3 products, show last week's ranking, each product's net sales, and its net sales in the previous week.

If a product enters or leaves the top 3, don't assume its sales rose or fell. Check its actual sales before interpreting the change in ranking.

Use arrows alongside the figures, not instead of them. Don't automatically present every increase as good or every decrease as bad. Use a neutral indicator where the meaning depends on context.

TRAFFIC AND FILTERS

- For sessions and conversion rate, focus on the countries or regions I serve, if Shopify supports those filters for the metric.
- Use the same geographic scope for sessions and sessions resulting in a purchase.
- Keep Shopify's default bot filtering on.
- Don't apply these geographic filters to the other metrics unless I ask.
- State which filters you actually used. If a requested filter wasn't available, say so.
- If sessions increase sharply without a corresponding increase in orders, flag it for investigation. Don't assume bots are the cause.

THEN ADD THREE SHORT SECTIONS

1. This week's priority

Recommend one focus for the week, based on the available evidence. Explain briefly why it deserves attention.

One priority can involve several related tasks. It might require a store change, an email review, better product photos, or a combination.

If the evidence is too limited to recommend a change, make the priority a specific check or investigation instead.

2. What to do this week

Suggest up to 3 practical actions supporting that priority.

For each action, say:

- What to check or change
- Which finding prompted it
- Whether it is a quick task or needs more work

Don't add tasks just to fill the list. If an action requires information you can't access, make that clear.

3. Watch out for

Include only unusual changes, missing data, or limitations that could affect the interpretation.

Be cautious with large percentage changes based on very small numbers.

If nothing needs flagging, leave this section empty.

DESIGN

- Create the dashboard as an HTML page or artifact, not an image. All numbers, labels and notes must be selectable text.
- Title: **[STORE NAME]** Monday Dashboard
- Brand colours: **[HEX CODES]**
- Use my uploaded logo if available. If it isn't, use the store name.
- Make it clean, readable and easy to scan: clear labels, prominent numbers, and enough space between sections.
- Keep the layout readable on desktop and mobile.
- Prioritise readable contrast over matching every brand colour.
- Keep the main dashboard to one page where practical, without shrinking the text to force it to fit. On mobile, stack the sections vertically.
- Put detailed calculations or technical notes separately.
- If you can't create an HTML artifact in this conversation, tell me and provide the report as readable text and tables instead.

RULES

- Use only real data retrieved from my Shopify store or files I provide.
- Never invent numbers, causes, or results.
- Distinguish between an observed change and a possible explanation.
- Use Shopify's reported average order value. Don't substitute net sales divided by orders.
- If data is unavailable, write "Unavailable" and briefly explain why.
- Don't claim to have reviewed my emails, product photos, or store pages unless you actually accessed them.
- Keep the language clear, direct and free of jargon.
- Add a short source note showing when the data was retrieved and any important filters or limitations.

STEP 4

4 Check the figures

Pick two or three numbers and compare them with Shopify for the same dates, using the same filters.

If something doesn't match, ask Claude to show which data it used and how it calculated the figure. Check the difference before relying on the report. Don't assume it's just rounding.

Once you're happy with the result, use it as the starting point for your weekly review.

If the dashboard feels too busy, ask Claude to simplify it. "Bigger numbers, less colour" or "give the sections more space" is enough. You don't need design terminology to explain what you want.

If you include screenshots when sharing your results, make it clear whether they show real store figures or illustrative example data.

Your Monday hour

Open your Monday Dashboard Project and run the update prompt for the latest week. Give yourself time to read the report, check anything unexpected, and choose one priority.

Then use the rest of the hour to start working on it. That might mean making a small change to your store, reviewing an email, or working out which product photos need replacing.

Some changes will fit into the hour. Others will need more time or several related tasks. You don't have to finish everything on Monday, but you should leave knowing what you're doing next and why.

BEFORE YOU PASTE THE PROMPT

Update [AMOUNT] with your monthly net sales target. If you want Claude to recommend prompts from The Prompt Library, share a link to it or upload a copy it can read.

WEEKLY UPDATE PROMPT · EVERY MONDAY Copy it from the online version →

Update my dashboard with last week's Shopify data. Retrieve and analyse data only. Do not make changes to my store.

Use the last complete Monday-to-Sunday week in my store's timezone. Show the exact dates.

COMPARISONS

Compare last week with:

- The previous Monday-to-Sunday week

- The equivalent Monday-to-Sunday week last year, if data is available, for net sales, orders and average order value only

Show the exact dates used for last year's comparison.

Keep sessions and conversion-rate comparisons within periods using the same Shopify measurement method. Don't compare periods across the September 2026 measurement change.

MONTHLY TARGET

My current monthly net sales target is **[AMOUNT]**.

Use month-to-date net sales through the last completed day to show:

- How much of the target I've reached
- How much is left, or how much I've exceeded the target
- Whether I'm ahead of or behind a simple pace based on the proportion of the month that has passed

Label this as a rough pace check, not a forecast. Show the month and the date used.

If fewer than 7 complete days of the current month have passed, also show last month's final net sales against last month's target, including the amount and percentage above or below target.

If you don't have last month's target, ask me for it. Don't assume it was the same as this month's.

START WITH TWO SHORT LINES

- Biggest win this week
- Main concern this week

If there isn't a clear win or concern, say so. Don't invent one to fill the space.

A product leaving the top 3 is not automatically a concern. Check its actual sales before treating the ranking change as a decline.

THEN UPDATE

- This week's priority
- Up to 3 practical actions supporting it
- Watch out for

Follow the rules from the original dashboard prompt.

Review the previous priority too. If you don't know whether I acted on it, ask rather than assuming. Don't attribute a change in performance to an action without evidence.

If a number deserves a closer look, suggest one relevant prompt from The Prompt Library. Only name a prompt if you can access that resource. Otherwise, ask me to share it.

RULES

- Keep the same settings, filters and design as before. If you can't access them, ask me.
- Update the HTML dashboard, keeping all numbers, labels and notes as selectable text.
- If HTML artifacts aren't available, provide readable text and tables instead.
- Use plain language.
- Keep commentary under 150 words, excluding figures, tables and source notes.
- Separate what the data shows from possible explanations.
- If a number is missing, say so. Don't fill the gap.
- If the data is too limited for a useful conclusion, say that too.

That last-year comparison gives you some perspective. A quiet August is less alarming when you can see that last August was quiet too. It doesn't explain everything, but it helps you spot a seasonal pattern before deciding something needs fixing.

LEVEL 2 · OPTIONAL

Adding Google Search Console

Shopify tells you about visits to your store. Search Console shows what happens before someone arrives: which searches your pages appear in, how often they're shown, and how often people click through. It won't show every search term, but it gives you more context than traffic figures alone.

That can help you find pages worth working on. A page might appear regularly in search results but get few clicks, giving you a reason to look more closely at how it's presented.

For this setup, we'll use a Google Sheets export rather than add another connector service. Search Console does have third-party connection options for Claude, so exporting isn't the only route. It's simply the one we're using here.

Set it up once

STEP 1

1 Open the report

In Search Console, open **Performance**, then **Search results**.

STEP 2

2 Pick your dates

Select the dates you want to review. Use the same Monday-to-Sunday period as your Shopify dashboard where the data is available.

STEP 3

3 Export to Google Sheets

Click **Export**, then **Google Sheets**. Give the file a clear name that includes the reporting dates.

STEP 4

4 Connect Google Drive

In Claude, go to **Settings**, then **Connectors**, and connect Google Drive.

Each Monday

Export the latest reporting period before running your Monday prompt. Share the new Sheet's link with Claude so it knows which file to use, rather than asking it to find "the latest one."

Check the latest date available in Search Console before exporting. If the full week isn't ready, use the available dates and ask Claude to flag the gap rather than treat a partial week as a complete one.

To compare weeks, Claude needs both sets of figures. Export the previous week too, or share the Sheet you saved last Monday.

Then add the following to the end of your Monday prompt.

BEFORE YOU PASTE THE PROMPT

Replace each [GOOGLE SHEET LINK] with the link to the export for that reporting period.

SEARCH CONSOLE ADD-ON Copy it from the online version →

Also review my Google Search Console exports:

- Latest reporting period: **[GOOGLE SHEET LINK]**
- Previous reporting period: **[GOOGLE SHEET LINK]**

First, confirm that you can read the relevant sheets and tabs. If you can't, ask me to upload the exports in a format you can access.

Check the dates inside each export, not just when the file was created. Tell me which dates you're comparing.

If the latest reporting period ends more than 7 days ago, flag that before using it.

Add to my dashboard:

- Google Search clicks, compared with the previous period
- My top 5 search terms by clicks, with their impressions, click-through rate and average position
- Up to 3 search terms worth investigating because they have relatively high impressions but few clicks

For those opportunities, consider average position and relevance to what I sell. Don't label them easy wins or assume the page title is the problem.

Where the export allows it, identify the page appearing for each term and suggest what to check next.

Don't infer a search-term-to-page relationship from separate lists of queries and pages. If the export doesn't show which page appeared for a term, say so.

Use comparable reporting periods and the same search settings and filters. If a week is incomplete, compare matching portions of the two weeks where possible and state the limitation.

If comparison data is missing, show the latest figures without inventing a change.

Use the report's total clicks for the overall figure where available. Don't assume the listed search terms account for every click.

Keep this section short. If there isn't enough evidence to recommend an action, say so.

Those search terms give you somewhere to investigate. Look at the page appearing for each term before deciding what needs changing.

If the page's copy needs work, the **Product page writer** prompt in The Prompt Library will help you review it. Give it the page and the search terms you've found, so it has something specific to work with.

When a number drops

Your dashboard helps you see what needs attention. If something needs a closer look, I've put the detailed prompts in The Prompt Library.

Find the number you want to investigate below, then follow the link to the relevant prompt. You don't need to work through them all. Just choose the one that fits what you've found.

Conversion rate	**Fix checkout drop-off**, if people are reaching checkout but not completing their order; or **Try a new angle**, if the offer or messaging needs reviewing
Average order value	**Build bundles**; **Check your prices and discounts**; or **Shipping and your free-shipping threshold**
Returning customer rate	**Sort your customers into groups**; **Do I need a loyalty program?**; or **Listen to your customers**
Sales of a usually strong product	**Avoid stockouts**, if availability is the issue; or **Product page writer**, if the page needs work
Clicks from Google	**Product page writer**, if your review points to a problem with the page's copy
Where sales come from	**Where your buyers come from**, if you use Google Analytics and want to compare traffic sources with Shopify sales

Cheat sheet

Net sales	Sales after discounts and returns. Your main sales figure, but not your profit.
Orders	How many orders were placed. Read this alongside net sales and average order value to understand whether fewer people bought or the average purchase was smaller.
Conversion rate	The percentage of store sessions that resulted in a purchase. Use the same filters each week so you're comparing like with like.
Average order value	The average amount spent per order. If it changes, look at what people bought and which offers were running before deciding whether you need to do anything.
Top three products	Your leading products by net sales, not units sold. Useful when deciding what to feature in emails and posts, and which stock needs attention. A change in ranking doesn't tell the whole story: a product can leave the top three even if its sales haven't fallen.
Returning customer rate	The proportion of customers who have bought from you before, not the proportion of orders they placed. In a small shop, give yourself more than one week's results before drawing conclusions.
This week's priority	The focus you've chosen after reviewing the figures. It might be a quick fix or involve several tasks. Either way, you should know why it deserves your time.

You don't need to change something every Monday. Build the habit of looking, asking questions, and acting when there's a good reason to.

See you next Monday.

Undercurrents