



An Extended Guide · No. 1915

Selling Online and In Person — One Catalog, One Set of Books

Keeping inventory and sales in
step across a shop and a website

Tech Made Simple — Service Made Personal

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✓ The goal in one line: one of everything

If you sell both online and at a counter, aim for ONE catalog, ONE inventory count, and ONE customer list across both. When a sale in either place updates the other, you stop overselling and you stop entering everything twice. That single idea is the whole point of this guide.

Selling online and in person, without the double work

Running a shop and a website at the same time can feel like running two businesses. It doesn't have to. This guide shows how to keep the two halves in step so they behave like one.

I'm Bill, and I run Bill's Home Tech here in Portage County, Ohio. I've spent 30+ years helping folks with their technology, and a lot of that is helping small shops that have added a website — or websites that have added a shop — stop tripping over themselves.

The pain is always the same: a thing sells online while it's also sitting on the shelf, so you sell it twice and let one customer down. Or you spend your evenings copying numbers from one system into another. Both problems have the same cure, and it's not more hours — it's one system doing the work.

★ You don't have to pick online OR in person

The whole reason these systems exist is so you can do both without the headache. You keep your counter AND your website, and the system keeps them honest with each other. That's the goal we're aiming at together.

The whole guide, on one page

If you remember only these things, your shop and your website will stay in step.

- ❑ Aim for one catalog, one inventory count, and one customer list across the counter and the website.
- ❑ A sale in either place should update the other automatically, so you never oversell.
- ❑ Systems like Shopify and Square unify online and in person — Shopify leans strong when the website leads, Square when the counter leads.
- ❑ Keep pricing and tax consistent across channels (shipping is taxed by the destination — see our Ohio sales-tax guide).
- ❑ Keep one place for your books and reports so both halves add up together.
- ❑ Decide up front how returns, exchanges, and buy-online-pickup-in-store work across channels.

✓ One rule to hold onto

If you ever find yourself typing the same sale or the same product into two systems, stop — that's the sign your two halves aren't really connected yet, and it's exactly what this guide fixes.

One catalog — your products in one place

Everything starts with the catalog: the list of what you sell, with names, prices, and details. Keep it in one place and the rest falls in line.

In a unified system, you enter each product once. That same entry shows up on your website and on your register, with the same name, the same price, and the same photo. Change the price in one spot and it changes everywhere, so your window sign and your web page never disagree.

The alternative — a separate product list for the shop and another for the site — is where mismatches creep in. A price gets updated in one and not the other, an item is renamed in one place, and soon your two halves tell your customer two different stories.

✓ Enter it once, see it everywhere

The test of a truly unified setup is simple: you should never have to type a product in twice. If you do, your catalog isn't really shared yet, and that's the first thing to fix.

One inventory count — so you never oversell

This is the big one, the problem that drives most owners to unify in the first place: selling something you don't actually have.

With a shared inventory count, every item has one number — how many you've got — and both the website and the register draw from it. Sell the last one at the counter and the website instantly shows it sold out. Sell it online and the register knows it's gone. One number, always current.

Without that, you're guessing. The classic disaster is the one-of-a-kind item that sells online Friday night and again in the shop Saturday morning — now you've taken two payments for one thing and have to disappoint and refund a customer. A shared count makes that impossible.

! Overselling costs you twice

An oversell isn't just an awkward refund — it's a let-down customer and a hit to your reputation. If you sell limited stock or one-of-a-kind pieces, a single shared inventory count isn't a luxury; it's the reason to unify.

One customer list — knowing your people

The third 'one' is your customers. When the shop and the website share one list, a customer is the same person whether they buy in person or online.

That means their purchase history, their loyalty points, their email for a receipt or a sale announcement — all in one record, no matter where they bought. A regular who usually comes in but orders online once over the holidays is still recognized as your regular.

Split lists give you two thinner pictures of the same person and make loyalty, receipts, and marketing clumsier. One list lets you treat a customer like the one person they are, which is exactly what makes a small shop feel personal even online.

✓ Mind your customers' privacy

One customer list is powerful, so handle it with care: collect only what you need, keep it inside your system, and don't share or sell it. Treat their details the way you'd want yours treated.

The systems that unify both sides

Several systems are built to run your counter and your website as one. Two come up most for small businesses, and they lean different ways.

Shopify grew up as an online-store builder, so it's especially strong when your website is the heart of the business and the shop is an extension of it. Square grew up at the counter, so it's especially strong when the in-person shop leads and the website supports it. Both do both — the question is which end of your business carries the weight.

Clover and Toast can connect to online ordering too, more so for food. The honest point is that there's no single winner here: the right one depends on whether your business is a shop with a website or a website with a shop. Our choosing-a-system guide walks through matching one to how you sell.

★ Which end leads your business?

That one question — does the website lead or does the counter lead? — points you at the right system faster than any feature list. Tell me how your sales actually split and I'll help you see it. Call (330) 200-8042.

Consistent pricing and tax across channels

Once your catalog is shared, pricing stays consistent by itself. Tax is the piece that trips people up, because online tax has its own rules.

In the shop, you charge the sales-tax rate for your location. Online, when you ship an order, the tax usually follows the DESTINATION — the rate where the customer is, not where you are. A unified system can handle both, but you have to set it up, and the shipping charge itself may be taxable.

This gets detailed fast, and the rules change, so I'll keep it simple here and point you to the right place. Our Ohio sales-tax guide covers destination-based tax on shipping, your county's combined rate, and filing through the Ohio Business Gateway — and your CPA or bookkeeper is the right call for the fine points. I'm a tech helper, not an accountant.

! Don't guess at online sales tax

Charging the wrong tax online is easy to do and a headache to unwind. Set your system up with care, lean on our Ohio sales-tax guide, and confirm your setup with your CPA — especially if you ship outside Ohio.

One set of books and reports

If your shop and website keep separate records, you're doing your bookkeeping twice and still not seeing the whole picture. One set of books fixes both.

When both channels run through one system, your sales, your fees, your tax collected, and your inventory all land in one set of reports. At tax time or when you're deciding what to reorder, you look in one place and see the whole business, not two half-pictures you have to add up in your head.

What you track	Why one place helps
Total sales	Shop plus web, added for you
Tax collected	One report to file from
Fees paid	See the real cost of each channel
Inventory	One count, always current
Best sellers	Across both, not guessed

✓ **Make tax time boring**

The reward for one set of books shows up every spring: clean reports you can hand your bookkeeper instead of a shoebox from two systems. Boring tax time is the best kind.

Returns and exchanges across channels

Here's where a lot of unified setups get sloppy: a customer buys online and wants to return in the shop, or the reverse. Decide the rules before it happens.

The convenience customers love is buying one way and returning the other. A unified system can handle it — the return finds the original sale, puts the item back into your one inventory count, and sends the refund to the original card. But you have to set the policy and train staff so it's consistent.

A couple of things to settle up front: will you accept in-shop returns of online orders, how do you handle shipping costs on a return, and does a refund always go back to the original card? Keeping to the original-card rule also protects you from the refund scams our merchant-scams guide covers.

✓ Write the policy down once

Post a short, clear return policy that covers both channels, and make sure every staff member knows it. A consistent policy across shop and web saves arguments and keeps your inventory count honest.

Two kinds of small business, two setups

Unifying online and in person looks different depending on which end leads. A fixed shop that added a website and a web-first seller who added a counter are solving the same problem from opposite directions.

If you sell from a fixed counter or shop

You're a shop first — a counter, a register, foot traffic — and the website is an extension that lets regulars and out-of-towners buy when they can't drop in.

- The counter leads, so a counter-strong system like Square fits naturally.
- Your in-shop inventory is the master count the website should draw from.
- Buy-online-pickup-in-store is a natural fit — sell online, hand it over at the counter.
- Set shipping tax by destination for mailed orders (see our tax guide).

If you sell on the go — markets, trucks, house calls

You're a website first — most sales come online — and the in-person side is a booth, a pop-up, or a small shop where people can also buy face to face.

- The website leads, so a web-strong system like Shopify fits naturally.
- Your online catalog is the master; the register just draws from it.
- A light handheld reader lets your website's catalog ring up in-person sales too.
- Keep one customer list so online regulars are recognized in person.

★ Not sure which end leads?

Lots of businesses are genuinely balanced, and the split can shift over a year. Tell me roughly how your sales divide and I'll help you pick a system that fits today and bends as that balance moves. Call (330) 200-8042.

Buy online, pick up in store

One of the friendliest things a unified setup unlocks is letting a customer buy on your website and collect at your counter. Here's how it works in plain terms.

The customer orders and pays online, choosing pickup instead of shipping. Your system holds the order, pulls the item from your one shared inventory, and tells you to set it aside. The customer swings by, you hand it over, done. No shipping cost, no waiting on the mail, and often a reason they buy something else while they're in.

To make it smooth

- Have a clear spot and a simple way to confirm the customer's identity and order.
- Let the customer know the moment it's ready to collect.
- Keep the item pulled from inventory so it isn't sold again from the floor.

✓ A small feature customers love

Pickup is the kind of convenience that turns a one-time web buyer into a regular who walks in. If your system offers it and you've got a counter, it's an easy win worth switching on.

Getting your two halves talking

If you're running a shop and a website on separate systems today, here's the calm order to bring them together. No need to do it all in a weekend.

- **Pick one system** to be the home for both, chosen by which end of your business leads (see our choosing-a-system guide).
- **Build one clean catalog** — names, prices, photos — and make it the single source for shop and web.
- **Set your inventory counts** accurately once, so the shared number starts out true.
- **Set tax** for in-person and for shipped orders (lean on our Ohio sales-tax guide).
- **Move your customer list** into one place and merge duplicates.
- **Test a sale each way** and watch the inventory and reports update.

★ I'll help you make the move

Bringing two systems into one is exactly the kind of untangling I enjoy. We'll go step by step so nothing gets lost and your counts come out right. \$99 flat for a visit, 30-day come-back-free. Call (330) 200-8042.

Keeping your inventory count honest

A shared count is only as good as the numbers you put in. A few habits keep it trustworthy so the website never oversells.

Count carefully when you set up, and then let the system do the arithmetic — every sale, online or in person, should flow through it so the number stays live. The trouble starts when sales happen outside the system: a cash sale rung up wrong, an item given away, a return not recorded.

Habits that keep the number true

- Ring every sale through the system, including cash and in-person.
- Record returns and exchanges so the item goes back into the count.
- Do a periodic physical count and reconcile it against the system.
- Fix discrepancies promptly, before they compound into overselling.

! Sales outside the system break the count

Every sale you make off the books — a quick cash deal not rung up — quietly throws your shared count off and sets up an oversell online. If it's unified, it all has to go through the one system.

Shipping, without the surprises

Adding a website means adding shipping, and that carries its own small decisions. Settle them early so they don't eat your margin.

Decide how you'll charge for shipping — a flat rate, by weight, or free over a threshold — and remember that the shipping charge itself may be taxable depending on the rules. Build the cost of packaging and postage into your thinking so a web sale doesn't quietly lose money.

Most unified systems connect to shipping labels and rates right in the order screen, which saves trips to the post office. Set it up once and fulfilling a web order becomes print-and-pack rather than a project.

✓ Tax on shipping is a real thing

Whether and how you tax shipping follows the rules for the destination, and it's easy to get wrong. Our Ohio sales-tax guide covers it, and your CPA can confirm your setup — don't eyeball it.

Don't take on more than you can serve

A website opens your shop to the whole world, which sounds great until a rush of orders buries a one-person operation. Grow into it.

The systems make selling everywhere easy; they don't make fulfilling everywhere easy. Before you push your website hard, be honest about how many orders you can pack, ship, and support in a day without the quality slipping. It's better to grow steadily than to drown in your own success and let customers down.

Lean on your reports to see what's really selling and plan your stock and your time around it. A unified system's whole-business view is exactly what lets you grow at a pace you can actually serve.

✓ Steady beats sudden

A website that grows a little each month is a joy. One that goes viral before you're ready is a pile of angry emails. Build the muscle to fulfill before you turn up the volume.

Questions to ask before you unify

Whether you're talking to a salesperson or to me, these questions make sure a system really joins your two halves rather than just promising to.

Q: Is it truly one catalog and one inventory count, or two that sync?

You want one shared record, not two lists that copy back and forth on a delay. Ask whether a counter sale drops the website's stock instantly, and test it before you rely on it.

Q: Can I take returns from one channel in the other?

Confirm a customer can buy online and return in the shop (and the reverse), that the refund goes to the original card, and that the item goes back into your count.

Q: Does it handle tax for both in-person and shipped orders?

In-person tax follows your location; shipped tax usually follows the destination. Make sure the system does both and lean on our Ohio sales-tax guide to set it up.

Q: Can I offer buy-online-pickup-in-store?

If you've got a counter, pickup is a lovely convenience. Check it's supported and simple to run before you count on it.

✓ Test it before you trust it

Promises are easy; proof is better. Before you commit, ring a test sale each way and watch the inventory and reports move. If they don't update in step, it isn't really unified.

Common mistakes people make

A handful of avoidable slip-ups cause most of the online-and-in-person headaches I get called about. Now you'll know them in advance.

- **Running two separate systems** and copying products and sales between them by hand.
- **Letting inventory counts drift** by making sales outside the system, then overselling online.
- **Guessing at online sales tax** instead of setting destination tax and checking with a CPA.
- **No clear cross-channel return policy**, so staff improvise and the count goes wrong.
- **Pushing the website harder than you can fulfill**, and drowning in orders you can't pack.
- **Refunding to a different card** on an online return — always the original card (see our merchant-scams guide).

! The one that burns customers

The costliest mistake is overselling — taking money for something you don't have because your two halves weren't really connected. One shared inventory count is the fix, and it's worth the setup every time.

Growing into both channels over time

You don't have to launch a perfect online-and-in-person operation on day one. The nicest part of a unified system is that it grows with you.

Start with whichever side you have, get it clean and running, then add the other when you're ready — a shop adding a modest website, or a website adding a market booth. Because the catalog, inventory, and customers are already in one place, bolting on the second channel is far less work than starting it from scratch.

A step ahead is enough. You don't need to build for the business you might be in ten years; you just need a system that won't box you in when you add the obvious next thing. Our choosing-a-system guide covers picking one with that room.

★ Plan one step ahead

Tell me where you're headed — more online, more in person, a second location — and I'll help you set up both halves so the next step is easy instead of a rebuild. Call (330) 200-8042.

When something goes out of step

Even a good unified setup can drift — a count looks wrong, a web order doesn't show up at the register. Here's how to steady it.

Most 'out of step' trouble is a connection or a setting, not a disaster. Check that your internet is solid, that both the website and the register are signed into the same account, and that recent sales actually posted. A quick reconcile against a physical count usually shows where the number went astray.

Keep a simple fallback for busy moments — a backup reader, and the know-how to ring a sale even if one side is briefly down. Our offline-mode and register-network guides cover keeping things running when the connection wobbles.

✓ A local hand when the numbers don't add up

If your counts and your books stop agreeing and you can't see why, that's a good time to call me. I'll help you find where the two halves slipped and get them back in step, in plain English.

Setting honest expectations

A unified system is a powerful tool, not a magic wand. Knowing what it will and won't do keeps you happy with your choice.

It will end the double-entry, keep one honest inventory count, and hand you one clean set of books. It won't pack your orders, fix a weak internet connection, or make the right tax decisions for you — those stay your job, with your CPA's help on the tax. The system removes the busywork so you can do the real work.

Expect a bit of setup to get your catalog and counts right, a short learning stretch, and the occasional reconcile. Once it's humming, you'll wonder how you ran two systems at once. That's the payoff, and it's worth the setup.

✓ Give the setup its due

The one place not to rush is the initial catalog and inventory count. Get those right at the start and the system stays honest for years; get them sloppy and you'll chase mismatches forever.

Common Questions

The questions owners ask me most about selling online and in person, answered plainly.

Q: Do I really need one system for both, or can I just sync two?

You can sync two, but a single shared catalog and inventory count is far less trouble — there's no delay and nothing to copy. For most small shops, one system doing both beats two systems talking to each other.

Q: Should I use Shopify or Square for this?

It depends on which end leads. Shopify is especially strong when your website carries the business; Square is especially strong when the counter leads. Neither is 'best' — our choosing-a-system guide helps you match one to how you sell.

Q: How does sales tax work when I ship an order?

In the shop you charge your local rate; for a shipped order the tax usually follows the destination, and the shipping charge may be taxable. Our Ohio sales-tax guide covers it, and your CPA can confirm your setup.

Q: Can a customer buy online and return in my shop?

Yes, with a unified system — the return finds the original sale, puts the item back in your count, and refunds the original card. Just set a clear policy and train your staff so it's consistent.

★ Still weighing it up?

Getting your shop and website to behave like one business is one of my favorite projects, because it buys back your evenings. Call or text me at (330) 200-8042 and we'll map out one catalog and one set of books for you.

You don't have to figure this out alone

You just have to remember that a friendly, patient person who speaks plain English is one call away.

I hope this guide made selling online and in person feel a little less daunting and a lot more doable. Keep it with your other business papers, come back to a page whenever you need it, and don't feel you have to memorize a thing.

When you'd rather have a hand, that's exactly what I do. I come to your shop or your kitchen table, work at your pace, and never make you feel rushed or silly for asking. A first visit is a flat \$99, and for the parts that don't need me on-site I can often help right on your screen for \$49. Every visit comes with a 30-day, come-back-free guarantee. I don't sell payment processing and I earn no commission from any company — so the advice you get is just honest advice. For the tax and legal fine points, I'll point you to your accountant or attorney.

★ Bill's Home Tech — real help, close to home

Call or text me at (330) 200-8042, or visit BillsHomeTech.com. Serving Atwater and all of Portage County. 30+ years of patient, plain-English tech help — and if you're ever not 100% happy with a visit, I'll make it right or refund it. That's a promise. — Bill

One of Each, Across Both Channels

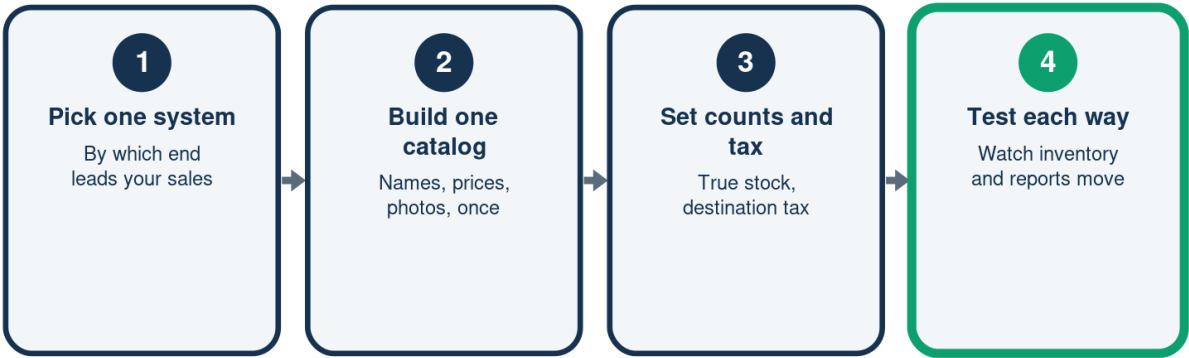
What 'unified' really means

	Shop and web share	Why it matters
One catalog	Enter once	No mismatches
One inventory	One count	Never oversell
One customer list	One record	Loyalty, receipts
One set of books	One report	Easy tax time

A sale in either place updates the other -- that's the whole idea.

Bringing Two Halves Together

The calm order to unify a shop and a website



No need to do it all in a weekend -- step by step keeps counts true.

Which End Leads Your Business?

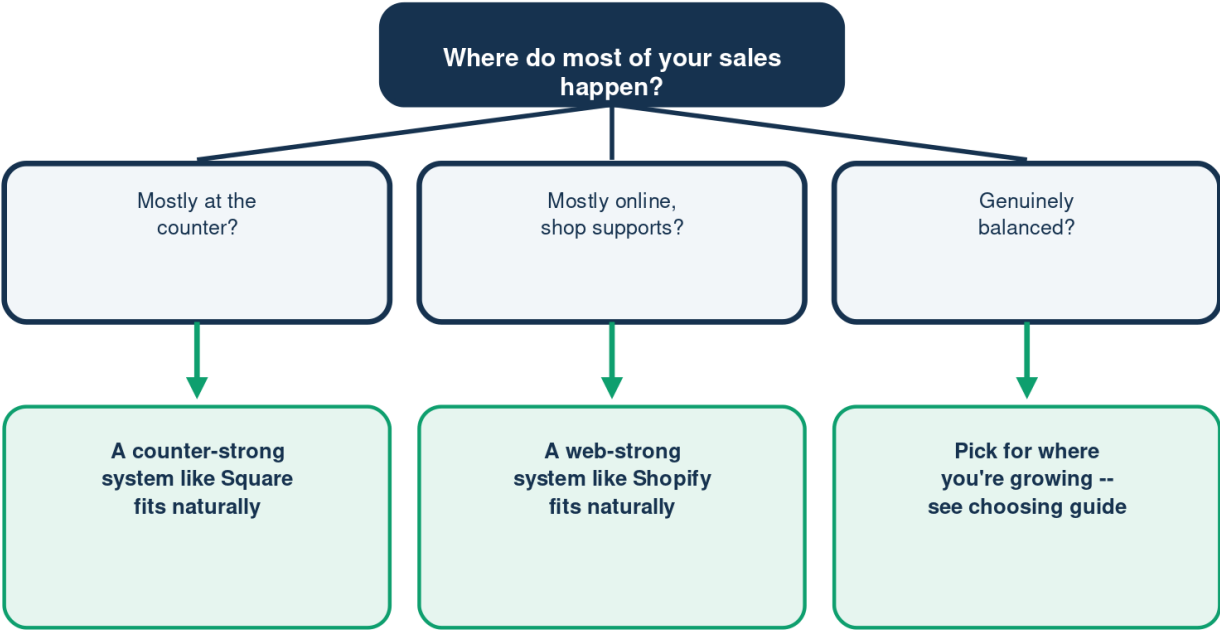
It points you at the right system

	Shop leads	Website leads
Most sales	At the counter	Online
Master count	In-shop stock	Online catalog
Fits naturally	Square	Shopify
In-person gear	Full register	Light reader

Neither is best -- it depends which end carries the weight.

Which System Fits Your Mix?

Let the balance of your sales decide



Tax on shipped orders follows the destination -- see our tax guide.

Illustration - a schematic, not to scale. Your setup may differ.



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A Note From Bill

A quick note from Bill.

I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that comes from using these guides. Thanks for reading, and stay safe out there.

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