



**C O'Malley & Associates LLC  
Online Store/Ecommerce Worksheet**

This worksheet is to help us understand what kind of store you envision. Don't worry if you can't fill it out completely on your own, though try to figure the number of products, products with options, and categories. This helps us choose the best sales options for your store as well as allowing us to give a more accurate quote. Product features and layout are dependent on the shopping cart. Unless you prefer a totally custom programmed cart, there will be limitations to how items are displayed or features available. We try and find a cart that best fits as many of your desires as possible based on the information you provide here.

Tell me about your target customer at your store?

Will this mainly be an online endeavor or will it be in addition to an established brick-n-mortar operation?

Online  In addition to brick-n-mortar store

Who is your competition?

Do you have a business plan?  Yes  No

How much do you expect to earn from the site?

How much will you need to earn?

Who will handle day-to-day admin? Do they need training & support?  Yes  No

Do you have existing branding or will you also require this to be created?  Yes  No

How will you market the site?

When does the site need to be launched?

How will you encourage repeat purchases and customer loyalty?

Will the cart storefront be enough or will you have a website with information as well?  Yes  No

Will you need to the look and feel of your store to match your site?  Yes  No (Some carts lend themselves more to customizing the layout more than others.)

Are you willing to pay for a totally customized shopping cart to get exactly the look and features you want (this starts at \$10,000+)?  Yes  No

Will you be considering an eBay or Yahoo store in addition to your online store?  eBay  Yahoo  Other

Will we be setting it up?  Yes  No What kind of payment will you take from this store?

**Content and Product Administration**

Will you need a built-in Content Management System (CMS) for managing products, categories, web (content) pages, and links.  Yes  No

What computer system & browser will you use to view, edit?

How technically savvy do you feel?  Internet novice  comfortable with email & internet  comfortable with filling in forms and have learned some programs  I can figure anything out

Any particular administration features you specifically need?

email list  inventory tracking  bulk product submissions  statistics  banner manager

**Store-Building Software**

- Smaller stores 5 to 500 products
- Medium stores 100 to 2,000+ products
- Larger Database-Driven Stores - larger catalog stores 1,000 to 100,000 products
- Other

I have a cart in mind that I like  (url or cart name)

Does it allow a database for the cart if needed?  Yes  No What kind?  Access  MYSQL  Other

Do you need a fully supported commercial solution, or are you happy to go 'open source'? (realizing there may be limitations to what open source can do or how much it can be customized – there will still be set up costs even though it is often “free”)  Want to be able to customize completely (more expensive)  Open Source

Type of Sale

- Retail (sale to end user)
- Wholesale, business-to-business (to resellers or manufacturers)
- Desire to do both

**Products**

Type of Products:

How many products (separate SKU numbers) do you plan for your store?

Do these SKU numbers represent different colors or sizes for the same product?  Yes  No

**Options (color, size, etc. in a drop-down menu).**

This number of products  has an average of  options each.

Did you count each of the options as a different product above?  Yes  No

Are all product descriptions done?  Yes  No

Do you have the weight of each product?  Yes  No

Do you already have all the product images ready in thumbnail and larger form?  Yes  No

Will you want personalization?  Yes  No

Will you want to be able to upload pictures, etc.?  Yes  No

Will you need Inventory tracking?  Yes  No

How extensive?

**Product Photos**

A substantial part of the cost of developing a store is in preparing the product photos. But, of course, they are often what motivate people to purchase.

Number of product photos  Will you require thumbnails as well as full size photos?  Yes  No

Format to be submitted to us:

- Prints  Transparencies  Digital or prescanned
- Web Ready (digitized, sized, optional border, background removed, JPEG or GIF format)

## Product Information Format

Typical product information needed (depending upon the complexity of your site):

- SKU
- Product Name
- Product Description
- Weight
- Price
- Picture File Name
- Category
- Subcategory
- Related product SKUs for cross-selling
- color/size options of SKU
- other descriptive fields (such as ISBN for books), etc. These will usually be fields in a spreadsheet or database.

Will all products have the same options (color, size) or will they differ by category?

## Database Format

My products are:

- Not currently in database or spreadsheet
- Excel
- FileMaker Pro
- Access
- Foxpro
- Sybase
- Oracle
- Other or Unknown

Anything other than Excel and Access may need to be converted to a web-based system for ease of use at additional cost.

Product Batching allows you to add, edit, or update several products at once. Will you need to insert many products at a time?  Yes  No

The larger the store, the more categories you'll need. Site menus and search engines use these categories to group products so shoppers can find them quickly. We'll need a list of these from you. You'll also need to put the category and subcategory(ies) in fields in your database.

Number of Main Categories or "Departments"

Total number of Subcategories in all "departments"

Sketch Your Preferred Product Page Layout(s)

Show preferred placement of: (1) product photo, (2) product name, (3) product SKU, (4) product description, (5) price, and (6) order button.

Will you need the site to maintain your inventory as well?  Yes  No

## Product Kits & Bundling

Kitting allows you to combine required and optional products and sell as a single item. (A great feature for designing computer systems, gift baskets, and more. Offers more flexibility than product options.) Will you need this feature?

Yes  No (if yes, please describe how you might use it)

## Vendors, and Affiliates

Are Search and member group features needed?  Yes  No

For customers?  Yes  No

Vendor notifications?  Yes  No

Affiliate system with automatic signup?  Yes  No

Warehouses allow you to specify the ship from locations of your product inventory.

### Will you be doing Discounts, Promotions, and Specials?

Will you want to create your own discounts?  Yes  No

Coupon promotions?  Yes  No

Time sensitive product specials?  Yes  No

Gift certificates?  Yes  No

Special product promotions?  Yes  No

Discount codes?  Yes  No

Wishlist?  Yes  No

Gift registry?  Yes  No

From certain groups?  Yes  No

For volume purchases?  Yes  No

### Special Order Form Instructions

Gift wrapping

Gift card inscription

Shipping instructions

Other

An e-mail manager allows you to create many different custom emails and send them individually. Will you have need for this for Mailing list feature?  Yes  No

Will you want Fulfillment emails automatically sent for orders, shipments, etc.  Yes  No

### ESD - Electronic Software Delivery

Will you use ESD to sell digital goods from your store such as software or e-books  Yes  No

### Reporting and Statistics

What kind of statistics will you need?

Will you charge Sales Tax  Yes  No

Some stores require the ability to configure and collect taxes on your orders per country, state, or zip.  Yes  No

Do you need to setup taxes that are specific to products?  Yes  No

Do you need to apply multiple taxes?  Yes  No

Shipping & Integrated Shipping Services  Yes  No

You can setup your own custom shipping methods UPS OnLine® Tools\USPS® FedX® CanadaPost DHL All together or just check the ones you need.

### Shipping Options Offered

Ground  2nd Day  Overnight

Carrier:  UPS  FedEx  Airborne  DHL  Postal Service  Other

### Shipping Calculation Methods

Not all shipping methods are available on all carts. Check the ones you prefer to use if possible.

- Disable shipping calculation
- Link to UPS or other shipper shipping cost calculator (not available with ShopSite)
- Flat Rate for all items (e.g., up to three books for \$8)
- Price Threshold (e.g., \$8 for orders between \$25 and \$50)
- Weight Threshold (e.g., \$8 for orders weighing between 10 and 12 pounds)
- Shipping Price specified for Each Item (useful for items with special packing or crating)
- Other

### Shipping Areas or Zones

Many merchants start with UPS zones and then average them so there are 3 or 4 zones for the continental US or other major market area. In the US, you will probably also have zones for Canada, and Alaska/Hawaii. For international customers state: "We will calculate the exact shipping amount and charge it to your card prior to shipping." Some merchants provide a flat rate for the continental US, particularly if they use Priority shipping.

Will you require tables for shipping rates, or a way of calculating for States or Counties where collection is required?

Yes  No

Will you need to calculate exact tax in many states where you are required to collect tax Payment Transaction?

Yes  No

Will you require your site to tie into an existing UPS, FedEx or other database to calculate shipping (expensive)?

Yes  No

Will you require package tracking?  Yes  No

### Payment Methods Available

Visa  MasterCard  American Express  Discover  COD  Purchase Order  Reseller Account No.

Other:

Money orders or checks may require an additional set up area to obtain the order then wait for receipt of the check/money order. This is an extra feature that is not in all carts.

Will you need this?  Yes  No

### Credit Card Authorization

Payment Methods and Processing Customize the methods of payment you accept for your store. Choose a popular payment gateway for real-time payment processings - people tend to trust what they know. Manual processing is fine but someone will have to manually obtain and input the credit card numbers for payment. Real time processing is more expensive but the amounts will automatically be credited to your bank account.

Do you have a merchant account that accepts internet payments and what is the gateway?  Yes  No

Gateway:  (company that processes the payment securely)

**Which processing method do you want to use:**

- Real-time on-line credit card authorization (recommended if you're setting up a Web business from scratch)
- Desktop credit card processing after order is received (begin here if you have an existing Merchant Credit Card Account)
- Secure Order Reception
- Store software e-mails you when an order arrives, but it won't e-mail sensitive credit card information. You'll need to get that in a secure manner.
- View completed order in Web browser and print out orders on printer (for low volume stores)
- Download order file for transfer to accounting system (for higher volume stores. You'll need to have a programmer write a macro to import into your order fulfillment software, this will be in addition to the store quote)

**Accounting Program Used**

Not all carts have the capability to download this information without customization. Program you use for accounting:

- QuickBooks
- Peachtree
- Mail Order Manager
- Other

Do you want to integrate Web orders with your accounting program if possible? (special programming probably required)  Yes  No  Maybe later

Do you want to integrate Web orders with an inventory program?  Yes  No (We don't handle this, but can refer you to a programmer.)

**Order Processing and Administration**

Will you need to search your store's order history?  Yes  No

**Names of "Regular" Pages.**

Product pages are usually designed on the basis of templates and may be included with the cart. "Regular" pages must be hand-designed using HTML, with custom photo insertion, etc. As such, they are more expensive. Typical "regular" pages are your "home" page, FAQ, about the company, articles, newsletters, and (sometimes) ordering instructions or forms.

- Welcome/Menu
- About the Company
- FAQ
- Newsletter
- Other:

**Response Forms (besides the order form)**

You may have a form where shoppers can ask questions, subscribe to a newsletter, get customer support, etc. We do not include your ordering system here. You may not need a structured feedback form; an e-mail response link may be all that is necessary.

Number of response forms (up to 20 fields each)

Purpose of response form(s):

**Web Hosting**

Due to the complexity of installing and hosting store-building software and relational databases, it is important that you accept our recommendations for Web hosting services. We charge for the additional time expended researching, installing and configuring stores on Web hosting services other than those we recommend. On the other hand, we have shopped for the best cost/performance/reliability in Web hosting services.

If you would like us to work with web hosting you have already purchased, we will need detailed information such as password/user and more. Web Hosting Service used:

**Digital Certificate of Site Security**

SSL Secure Servers use a Digital Certificate signed by a recognized authority (currently VeriSign or Thawte) which tells the shopper's Web browser that the store is what it purports to be. The configuration of some Web hosting

services requires each store to have its own Digital Certificate (at a cost of several hundred dollars per year). Others allow store owners to use the server's digital certificate. If you need a separate Digital Certificate, for an additional fee, we will interface with VeriSign and Thawte for you, saving you a considerable hassle.

Is manual security input required? (this stops automated bots from crashing your store with bogus orders)  Yes  
 No

Do you have a host with a shared secure server certificates well as being able to have a private certificate?  Yes  
 No

Or does the host allow SSL at all on their plan? Does the host have a recommended certificate?  Yes  No

### Globalization

Once your store appears on the Web you will have a global business. You will get orders from other countries, since many countries are not able to purchase these items locally. How will you make your site more comfortable for international customers?

### Some integrated shipping services support shipments from international destinations

International Features allow you to set up your own currencies and exchange rates. There are several ways to accomplish this, please let us know which you think you will need:

- Link to currency exchange calculator (Your credit card company handles exact exchange rates)
- Provide multiple languages for product names, product descriptions, order form details (name, address, phone), shipping instructions
- Provide instructions about international shipping options
- Provide international shipments with "International Air Waybill," "Commercial Invoice," or "Shipper's Export Declaration (SED)" as required. (You may obtain more information about requirements from your postal office or courier shipping service.)

### Copyright

Do you have copyright or license to your current STORE software?  Copyright  License  Don't know

Do you have copyright or license to your current SITE?  Copyright  License  Don't know  Neither

### Maintenance

Website creation does not include future updates. If you are interested in a maintenance package, let us know. We have several inexpensive packages (as well as pay-as-you-go updating) available that can keep your website fresh, interesting and up to date. Many clients will occasionally add a page now and then as their business grows so that their web presence keeps pace with their brick-and-mortar business. Will you be interested in maintenance services? (we give a price break for signing up for 1 year of maintenance services – standard pay-as-you go services are at our regular rate).

I think I would like a maintenance package and would like to talk to you about what is available?

Yes  No

**This form outlines our company's plans for our online store.** On behalf of \_\_\_\_\_ I have authority to approve the above plan I authorize C O'Malley & Associates Web Design LLC to use this information as the basis of the project in accordance with the Web Site Development Agreement.

Signature \_\_\_\_\_ Date \_\_\_\_\_

The content described within is confidential and the form shall not be used, disclosed or reproduced, in part or in whole for any reason other than for us to estimate or create your web development needs. Estimates are based on information provided in this document and are subject to change if the scope of the project changes.