

Store Planning & Catalog Worksheet

Planning is the single, most important factor when creating an online store or catalog. The first step in planning is determining all of the prerequisites of a shopping cart. Please complete this worksheet to give us a better understanding of your site's complexity.

Store Name: _____

1. Scope/ Size

- ___ smaller stores 5 to 500 products
- ___ medium stores 500 to 2,000+ products
- ___ Larger Database-Driven Stores up to 100,000 products
- ___ Other

2. Type of Sale

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

3. 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.

4. 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. Each product may have several images showing different angles, color etc.

Number of photos per product _____

In which format will you be submitting your images: ___Prints
___Transparencies ___Digitized (scanned)

___Web Ready (digitized, sized, optional border, JPEG or GIF format)

___Printed catalog

5. 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 option of SKU, other descriptive fields (such as ISBN for books), etc. These will usually be fields in a spreadsheet or database.

Database Format

__Not currently in database or spreadsheet __Excel __FileMaker Pro
__Access __Foxpro __Sybase __Oracle __Other_____

6. Categories of Products

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" _____

7. Sketch Your Preferred Product Page Layout(s)

On the other side of this form, show preferred placement of: (1) product photo, (2) product name, (3) product SKU, (4) product description, (5) price, and (6) order button.

8. Shipping

Shipping Options Offered

Ground 2nd Day Overnight

Carrier:

UPS FedEx Airborne Postal Service Other

Shipping Calculation Method

Disable shipping calculation

Link to UPS or other shipper shipping cost calculator

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)

Add handling costs

Other

Shipping Areas or Zones (6 included at no extra charge). 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."

9. Sales Tax (one state table at no extra charge)

Please use the back of this page to create a tax table showing:

States or Counties where collection is required/ Percent Sales Tax

10. Payment Transaction

Payment Methods Allowed

Visa MasterCard American Express Discover

COD P.O Reseller Account No.

Other: _____

Credit Card Authorization

Real-time on-line credit card authorization (recommended if you're setting up a Web business from scratch)

Desktop/ Manual credit card processing after order is received (begin here if you have an existing Merchant Credit Card Account)

11. 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. We can offer a tab-delimited file. You'll need to have a programmer write a macro to import into your order fulfillment software.)

12. Accounting and Inventory

Accounting Program Used

QuickBooks Peachtree Mail Order Manager Other

Do you want to integrate Web orders with accounting program? (special programming required) Yes Maybe Later No

13. Special Order Form Instructions

- ___Gift wrapping
- ___Gift card inscription
- ___Shipping instructions
- ___Other

14. Names of "Regular" Pages.

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

- ___Welcome/Menu
 - ___About the Company
 - ___FAQ
 - ___Newsletter
 - ___Other (specify below separated by commas)
-
-
-

15. 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):

16. 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 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. We do not resell hosting, but have you arrange your own contract with approved hosting services.

___ Recommend Web Hosting Service

or

I will use the following provider: _____

17. Digital Certificate of Site Security (SSL)

SSL Secure Servers use a Digital Certificate signed by a recognized authority (Like 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. Others allow storeowners 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.

18. 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?

___ 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.)

___ WILL NOT PROCESS INTERNATIONAL ORDERS

19. Other important information

This form outlines our company's plans for our online store.

Signature_____ Date_____