

## Getting Started

### COMPANY:

# 1

#### FLOW CHART

Sign off (yes/no)

#### PROJECT AGREEMENT

Sign off (yes/no)

#### DEPOSIT

Sent (yes/no)

#### COMPLETED DESIGN QUESTIONNAIRE

Sent (yes/no)

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 2

#### STORE DETAILS

Store Owner: \_\_\_\_\_

Store Name: \_\_\_\_\_

Store Address:\* \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Generic Email Address:\*\* \_\_\_\_\_

\*Address to appear on invoices & packing slips  
\*\*This should be something @yourdomain.com and will be used as the email connected to orders and messages sent to your store.

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 3

#### WEB HOSTING

\*New Hosting  Old Hosting

Set up? (yes/no): \_\_\_\_\_

Host Company: \_\_\_\_\_

FTP Info: \_\_\_\_\_

Server Address: \_\_\_\_\_

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

**\*Ask us for recommended vendors**

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 4

#### DOMAIN NAME

Need new URL? (yes/no): \_\_\_\_\_

Current URL: \_\_\_\_\_

Registered at: \_\_\_\_\_

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

DNS changed? \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Payment & Security

### 5

#### MERCHANT ACCOUNT

If using PayPal, skip to Steps 6 and 7

#### BANK MERCHANT ACCOUNT

Set up (yes/no)

Company: \_\_\_\_\_

Payment Gateway: \_\_\_\_\_

Gateway User Name: \_\_\_\_\_

Gateway Password: \_\_\_\_\_

Secret Question: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 7

#### SECURE CERTIFICATE

Company: \_\_\_\_\_

#### CSR

Generated (yes/no):

#### CERTIFICATE

Installed (yes/no):

**\*Ask us for recommended vendors**

Notes: \_\_\_\_\_

\_\_\_\_\_

### 6

#### PAYPAL PRO

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

Credit Cards Accepted: \_\_\_\_\_

\_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Details

### 8 SHIPPING

Cost Structure (by order amt., weight)

\_\_\_\_\_

Shipping Rates Sent (yes/no):

Ship to PO Boxes (yes/no):

### INTERNATIONAL SHIPPING

Ship International (yes/no):

Int'l rates sent (yes/no):

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 10 SITE CONTENT

About Us Sent (yes/no):

Contact Us Sent (yes/no):

Customer Service Sent (yes/no):

Privacy/Terms Sent (yes/no):

Press Images Sent (yes/no):

Other Pages Sent: \_\_\_\_\_

\_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### 9 TAX

Tax Rate: \_\_\_\_\_

States Charged Tax: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### MISCELLANEOUS

#### JOIN EMAIL LIST

Email Service (yes/no):

User Name: \_\_\_\_\_

Password: \_\_\_\_\_

Send To Email Address: \_\_\_\_\_

#### SUCCESS / CONFIRMATION TEXT

Checkout Success Screen:

Order Confirmation Email:

Account Sign Up Email:

Notes: \_\_\_\_\_

\_\_\_\_\_



## Information

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### WEB SITE HOSTING

In order for your web site to be viewed by the general public it must be placed on a high speed hosting server. You are welcome to use any hosting company you want as long as it's services are compatible with our programming. We are happy to review any company/service you prefer. Most hosting companies charge your credit card monthly (you should avoid paying for long periods of time up front until you feel comfortable with the service provided. Average charge is \$6 - \$10 per month.

We Need: FTP login (server or Temp IP address, user name and password)

### MERCHANT ACCOUNT / PAYMENT PROCESSING

To process credit card transactions on your web site you need to either set up a merchant account or use Paypal Pro's service. You may already have a merchant account for your brick and mortar store - if you do, contact the merchant account company and let them know that you will be adding a web component. If you are setting up initial service, let the company know that you don't need a terminal, but will be processing everything either automatically via your site or manually using your browser.

Your merchant account company will talk to you about Payment Gateways. You need to select a payment gateway to use with your account to process transactions from your site to your bank. They will give you a list of compatible gateways with their system. If you opt for PayPal's PayPal Pro service, they handle the processing for you and deposit money into your paypal account. \*Please check with us before signing up with gateway or paypal so we can confirm compatibility and function.

We need: Login (user name/password) for payment gateway or Paypal Pro

Common providers: Merchant Account - Wells Fargo, Nova, Gateways - authorize.net

## Information

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### SECURE CERTIFICATE

To ensure that all transactions are secure and encrypted, your site must be hosted on a secure server. Most hosting companies offer this as part of a package, but you want to make sure that the secure area is not shared. You want your domain to remain in the URL string throughout your checkout process. Most clients go to a third party to purchase their SSL. Charge for these is yearly and average cost is \$150-\$200 per year. Your hosting service must be established before you purchase your SSL because the server must generate information needed to process your SSL.

We Need: Link to retrieve your SSL, order number, password

### Domain Names / DNS

You may have registered your domain name prior to setting up your hosting account. Or you may have an existing hosting service that you'll discontinue once we start your project. In either case, you must switch your domain name to point to your new web host. To make this switch, you must be able to access your registered domain and change the DNS. You can get the new DNS nameserver info from your new hosting company.

**\*We can recommend vendors for all of the above services. Please let us know how we can help you with set up.**