

# SOPHISTICATED DESIGNS, LLC

## Store Planning Worksheet

This worksheet is designed to be **used over the phone** as a communication piece with Wilson Internet Services. 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 before we talk. When completed this allows us to give you an accurate price quote for your store. It should be used in conjunction with the [Website Planning Worksheet](#) and the [Website Design and Maintenance Agreement](#).

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|           | <b>Store Name:</b>  |
| <b>1.</b> | <b>Store-Building Software</b><br><input type="checkbox"/> Open Market ShopSite Manager (smaller stores 5 to 500 products)<br><input type="checkbox"/> Open Market ShopSite Pro (medium stores 100 to 2,000+ products)<br><input type="checkbox"/> Larger Database-Driven Stores (larger catalog stores 1,000 to 100,000 products)<br><input type="checkbox"/> Other  |
| <b>2.</b> | <b>Type of Sale</b><br><input type="checkbox"/> Retail (sale to end user)<br><input type="checkbox"/> Wholesale, business-to-business (to resellers or manufacturers)<br><input type="checkbox"/> Desire to do both   |
| <b>3.</b> | <b>Products</b><br><b>Type of Products:</b><br><b>How many</b> products (separate SKU numbers) do you plan for your store? _____.<br>Do these SKU numbers represent different colors or sizes for the same product? Yes___ No___<br><b>Options</b> (color, size, etc. in a drop-down menu).<br>This number of products _____ has an average of ___ options each.<br>Did you count each of the options as a different product above?<br><input type="checkbox"/> Yes <input type="checkbox"/> No   |
| <b>4.</b> | <b>Product Photos</b><br>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.<br><b>Number</b> of product photos _____<br><b>Format</b> ___Prints ___Transparencies ___Digitized (scanned)<br><input type="checkbox"/> Web Ready (digitized, sized, optional border, JPEG or GIF format)   |
| <b>5.</b> | <b>Product Information Format</b><br>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.<br><b>Database Format</b><br><input type="checkbox"/> Not currently in database or spreadsheet ___Excel ___FileMaker Pro ___Access ___Foxpro ___Sybase ___Oracle<br><input type="checkbox"/> Other_____ |

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| <b>6.</b>  | <b>Categories of Products</b><br>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" _____  |                   |
| <b>7.</b>  | <b>Sketch Your Preferred Product Page Layout(s)</b><br>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.   |                   |
| <b>8.</b>  | <b>Shipping</b>   |                   |
|            | <b>Shipping Options Offered</b><br>___ Ground ___ 2nd Day ___ Overnight   |                   |
|            | <b>Carrier:</b><br>___ UPS ___ FedEx ___ Airborne ___ Postal Service ___ Other  |                   |
|            | <b>Shipping Calculation Method</b><br>___ Disable shipping calculation<br>___ Link to UPS or other shipper shipping cost calculator (not available with ShopSite)<br>___ Flat Rate for all items (e.g., up to three books for \$8)<br>___ Price Threshold (e.g., \$8 for orders between \$25 and \$50)<br>___ Weight Threshold (e.g., \$8 for orders weighing between 10 and 12 pounds)<br>___ Shipping Price specified for Each Item (useful for items with special packing or crating)<br>___ Other |                   |
|            | <b>Shipping Areas or Zones</b> (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."   |                   |
| <b>9.</b>  | <b>Sales Tax</b> (one state table at no extra charge)   |                   |
|            | States or Counties where collection is required   | Percent Sales Tax |
|            | ___ <a href="#">TaxWare</a> Plugin to calculate exact tax in many states where you are required to collect tax (not available with ShopSite)  |                   |
| <b>10.</b> | <b>Payment Transaction</b>  |                   |
|            | <b>Payment Methods Allowed</b><br>___ Visa ___ MasterCard ___ American Express ___ Discover ___<br>COD ___ Purchase Order ___ Reseller Account No. ___<br>Other: _____  |                   |
|            | <b>Credit Card Authorization</b><br>___ Real-time on-line credit card authorization (recommended if you're setting up a Web business from scratch)<br>___ Desktop credit card processing after order is received (begin here if you have an existing Merchant Credit Card Account)  |                   |

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| 11. | <p><b>Secure Order Reception</b><br/> 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.<br/> ___ View completed order in Web browser and <b>print out orders</b> on printer (for low volume stores)<br/> ___ <b>Download order file</b> for transfer to accounting system (for higher volume stores. ShopSite offers a tab-delimited file. You'll need to have a programmer write a macro to import into your order fulfillment software.)</p>  |
| 12. | <p><b>Accounting and Inventory</b></p> <p><b>Accounting Program Used</b><br/> ___ QuickBooks ___ Peachtree ___ Mail Order Manager ___ Other</p> <p>Do you want to <b>integrate</b> Web orders with <b>accounting program</b>? (special programming probably required)<br/> ___ Yes ___ Maybe Later ___ No</p> <p>Do you want to <b>integrate</b> Web orders with an <b>inventory program</b>? ___ Yes ___ No (We don't handle this, but can refer you to a programmer.)</p>  |
| 13. | <p><b>Special Order Form Instructions</b><br/> ___ Gift wrapping<br/> ___ Gift card inscription<br/> ___ Shipping instructions<br/> ___ Other</p>  |
| 14. | <p><b>Names of "Regular" Pages.</b><br/> Product pages are usually designed on the basis of templates. "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.</p> <p>___ Welcome/Menu<br/> ___ About the Company<br/> ___ FAQ<br/> ___ Newsletter<br/> ___ Other:</p>   |
| 15. | <p><b>Response Forms (besides the order form)</b><br/> 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.</p> <p><b>Number</b> of response forms (up to 20 fields each) _____</p> <p><b>Purpose</b> of response form(s):</p>  |
| 16. | <p><b>Web Hosting</b><br/> 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.</p> <p><b>Web Hosting Service:</b></p> |

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| <b>17.</b> | <p><b>Digital Certificate of Site Security</b></p> <p>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.</p>   |
| <b>18.</b> | <p><b>Globalization</b></p> <p>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?</p> <p><input type="checkbox"/> Link to currency exchange calculator (Your credit card company handles exact exchange rates)</p> <p><input type="checkbox"/> Provide multiple languages for product names, product descriptions, order form details (name, address, phone), shipping instructions</p> <p><input type="checkbox"/> Provide instructions about international shipping options</p> <p><input type="checkbox"/> 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.)</p> |
| <b>19.</b> | <p><b>Other</b></p>  |

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

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