

## Overview.

This worksheet is designed to help focus your efforts when building or redesigning an eCommerce website. There are many other factors to consider during this process, but this worksheet focuses on the high-level critical factors that will organize your thinking and get you moving in the right direction.

For additional resources including our complete eCommerce project planning guide, visit [www.atlanticbt.com/expertise/ecommerce](http://www.atlanticbt.com/expertise/ecommerce)

## Objectives.

Why are you designing or redesigning your site? How will you define success?

What metrics do you use? Some ideas are: increase total sales, increase profit and reduce inefficiency and labor, or improve the time visitors spend on the site.

Objective.	Success.
Example: Increase total sales	\$400k or 20%
1.	
2.	
3.	

## Features of technical requirements.

Your features and technical requirements will help determine which platforms or service providers are the best fit for your requirements. Using the broad technologies below, indicate if you have a particular preference for the technologies that will be used to build your site. If your organization already has expertise in a technology set, you should indicate that preference.

Preferences.	Technology.
	LAMP (Linux, Apache, MySQL, PHP)
	Microsoft (SQL Server, ASP/.NET)
	Java (Oracle, Microsoft, MySQL, or other DB's)
	Ruby (Ruby on Rails with various DB's)
	Other Technologies (Specify)

This list of features comes from the Magento platform for their community (free) edition. Magento has one of the widest feature sets for an out-of-the-box shopping cart available. For each category, check the most important or critical features for your requirements and add any unlisted requirements you may have.

**Marketing, promotions and conversion tools.**

- ☐ Related products, up-sells and cross-sells
  - ☐ Catalog promotional pricing with the ability to restrict to stores, categories, and products
  - ☐ Flexible coupons (pricing rules) with ability to restrict to stores, customer groups, time period, products, and categories
  - ☐ Generate a set of unique coupon codes for each promotion and export the list of codes for offline distribution, email, newsletters, and more. Easily manage and monitor coupon usage and generate detailed reports
  - ☐ Multi-tier pricing for quantity discounts
  - ☐ Minimum Advertised Price (MAP)
  - ☐ Landing page tool for categories
  - ☐ Customer groups
  - ☐ Product bundles
  - ☐ Recently viewed and compared products
  - ☐ New items promotional tool
  - ☐ Persistent shopping cart
  - ☐ Google Website Optimizer integration for A/B and multivariate testing
  - ☐ Free shipping options
  - ☐ Polls
  - ☐ Newsletter management
  - ☐ Send to a friend for all visitors or registered users only
  - ☐ Send wish lists by email
- 
- 
- 
- 

**Search engine optimization.**

- ☐ 100% search engine friendly
  - ☐ Google Site Map
  - ☐ Search engine friendly URLs
  - ☐ URL rewrites give full control of URLs
  - ☐ Meta-Information for products, categories and content pages
  - ☐ Auto-generated popular search terms page
  - ☐ Google Content API for shopping
- 
- 
- 

**Site management.**

- ☐ Control multiple websites and stores from one Administration Panel with the ability to share as much or as little information as needed
  - ☐ Administration permission system roles and users
  - ☐ Fully 100% customizable design using templates
  - ☐ Support for multiple languages and currencies. Web Services API for easy integration between Magento and third-party applications
  - ☐ Batch import and export of catalog and customer information
  - ☐ Content Management System for informational and landing pages
  - ☐ Tax rates per location, product type of customer group (i.e. wholesale vs. retailer)
  - ☐ CAPTCHA functionality to help prevent automated software from attempting fake logins. This auto-generated test ensures that the login is being attempted by a person and can be enabled in both the admin and customer login areas
- 
- 
- 
-

**Checkout, payment and shipping.**

- ☐ One-page checkout
  - ☐ Guest checkout and checkout with account to use address book
  - ☐ Shipping to multiple addresses in one order
  - ☐ Option for account creation at beginning of checkout
  - ☐ SSL security support for orders on both frontend and back-end
  - ☐ Saved shopping cart
  - ☐ Accept gift messages per order and per item
  - ☐ Shopping cart with tax and shipping estimates
  - ☐ Saved credit card method for offline payments
  - ☐ Configurable to authorize and charge, or authorize only and charge on creation of invoices
  - ☐ Integration with Amazon payments
  - ☐ Integration with multiple PayPal gateways
  - ☐ Integration with Authorize.net
  - ☐ Integration with Google Checkout (Level 2)
  - ☐ Accept checks/ money orders
  - ☐ Accept purchase orders
  - ☐ Additional payment extensions available through Magento Connect
  - ☐ Shipping integration with label printing- view, edit, print labels for all major carriers.
  - ☐ Integrated for real-time shipping rates from: UPS, UPS XML (account rates), FedEx (account rates), USPS and DHL
  - ☐ Ability to specify allowed destination countries per method
  - ☐ Flat rate shipping per order or item
  - ☐ Free shipping
  - ☐ Table rates for weight, sub-total, destination and number of items
  - ☐ On-site order tracking from customer accounts
- 
- 
- 
- 

**Order Management**

- ☐ View, edit, create and fulfill orders from the admin panel
  - ☐ Create one or multiple invoices, shipments, and credit memos per order to allow for split fulfillment
  - ☐ Print invoices, packing slips and shipping labels
  - ☐ Call center (phone) order creation – provides transparent control for administrators and front-end enhancements for customers during the shopping process. Changing product configurations, for all types of products, can be done by the call center sales representative on the admin side as well as by the customer throughout the shopping process. Custom product choices and configurations can be changed directly during order creation, in the wish list and the shopping cart.
    - ☐ Includes the ability to create new customers, or select existing customers and view their shopping cart, wish list, last ordered items, and compared products lists, as well as select addresses, give discounts and assign custom pieces.
  - ☐ Assisted Shopping – customer service representatives and other admin users are able to manage products and coupons in customers' shopping carts and wish lists through the administrator panel
  - ☐ Customized Order Status– tracking an order is easier than ever with customizable order statuses easily assigned to order states. A predefined list of order states (ex. new, processing, payment review, complete) represents the order processing workflow. An order status is assigned as a subcategory of the order state (ex. cancelled, complete, decline)
  - ☐ Create re-orders for customers from the administration panel
  - ☐ Email notifications of orders
  - ☐ RSS feed of new orders
- 
- 
- 
-

**Customer Accounts**

- ☐ Account dashboard
  - ☐ Address book with unlimited addresses
  - ☐ Wish list with ability to add comments
  - ☐ Order status and history
  - ☐ Re-orders from account
  - ☐ Recently ordered items
  - ☐ Default billing and shipping addresses
  - ☐ Email or send RSS feed of wish list
  - ☐ Newsletter subscription management
  - ☐ Product reviews submitted
  - ☐ Product tags submitted
  - ☐ Downloadable/ digital products
- 
- 
- 
- 

**Customer Services**

- ☐ Contact Us form
  - ☐ Create and edit orders from the admin panel
  - ☐ Feature-rich customer accounts
  - ☐ Order history with status updates
  - ☐ Order tracking from account
  - ☐ Password reset email from front-end and admin panel
  - ☐ Order and account update emails
  - ☐ Customizable transactional email
- 
- 
- 
- 

**International Support**

- ☐ Support for localization, multiple currencies and tax rates
  - ☐ Includes support for WEEE/DEEE in EU
- ☐ Support for accented characters and right to left text
- ☐ Configurable list of allowed countries for:
  - ☐ Site registration
  - ☐ Shipping destination addresses with ability to specify per shipping method
  - ☐ Billing addresses with ability to specify per payment method
- ☐ Analytics and Reporting
- ☐ Mobile Commerce
- ☐ European Union VAT- ID validation facilitates the tax collection process by automatically applying the correct tax rules according to VAT customer groups
- ☐ EU cookie notification simplifies the EU Privacy and Electronic Communications Directive compliance process by displaying an opt-in message at the top of the storefront

**Analytics and Reporting**

- ☐ Integrated with Google Analytics
  - ☐ Admin dashboard for report overview
  - ☐ Sales report
  - ☐ Tax report
  - ☐ Abandoned shopping cart report
  - ☐ Best viewed products report
  - ☐ Best purchased products report
  - ☐ Low stock report
  - ☐ Search terms report
  - ☐ Product reviews report
  - ☐ Tags report
  - ☐ Coupon usage report
  - ☐ Total sales invoiced
  - ☐ Total sales refunded
- 
- 
- 
- 

**Mobile Commerce**

- ☐ Support for native applications on iPhone, iPad and Android mobile devices
  - ☐ One admin panel for multiple devices
  - ☐ Seamless integration with your current product catalog, CMS and store configurations
  - ☐ Real-time customization including updates for promotions and merchandising
  - ☐ Support for a wide range of checkout capabilities
  - ☐ Mobile HTML5 – quickly and easily create a storefront optimized for mobile devices so customers can shop even when they're on the go. This mobile interface uses HTML5 technology and supports iPhone, Android and Mobile Opera browsers. It includes out-of-the box features such as:
    - ☐ Device-specific media capabilities for audio and video
    - ☐ User-friendly search and results display
    - ☐ Clean display of product detail pages
    - ☐ Pinch, multi-touch and scaling images
    - ☐ Easy swipe between product images
    - ☐ Zoom capabilities
    - ☐ Cross-sell and up-sell capabilities
    - ☐ Drag-and-drop of products to the shopping cart
- 
- 
- 
-

## Key Audiences.

Defining your primary audiences is an important part of understanding and building your requirements to best attract and serve your key audiences to create more sales. Professional web development firms call these personas and carefully develop them through workshops and research. Listing your key audiences is a great start to building personas and will help you define your requirements.

Audience	% of Focus
Example 1: Women with children under the age of 5.	60%
Example 2: Grandparents of children under the age of 5.	20%
1.	
2.	
3.	
4.	
5.	

## Traffic scalability.

Before building a site, you should have some targets or existing traffic metrics to help guide development and hosting decisions. There is a huge difference between building a site for 500 visitors a month and 50,000. Use the worksheet below to help establish general traffic and scalability requirements for your organization.

	Unique Monthly Visitors	Monthly Pageviews	Peak Visitors	Daily Completed Orders (Avg.)
Example:	5,000	23,000	28	25
Current				
Year 1 (future)				
Year 2 (future)				

**Unique Visitors:** This is the total number of visitors (new and returning) to your site in an average month.

**Pageviews:** Page views represent the number of times all available pages are requested (and loaded) in a given time period. If a visitor looks at 5 pages, they will create 5 pageviews.

**Peak Visitors:** The maximum number of unique visitors active on the site at any one time.

**Completed Orders (transactions):** The total number of completed orders in a given time period.

## Product / Catalog

Many custom eCommerce requirements are related to the management, display, and organization of products. The size of the catalog will also influence the design, organization, and management of the site. Use this section to help define your product/catalog requirements.

	Current	Year 1 (Future)	Year 2 (Future)
# of Products			



The list below includes common ecommerce platform features. Use this table to mark which features you need for catalog management and browsing. Add any features that are not included.

### Catalog Management

- ☐ Simple , configurable (e.g. size, color, etc.), bundled and grouped products
- ☐ Create different price points for different customer groups, such as wholesalers and retailers
- ☐ Virtual products
- ☐ Downloadable/digital products with samples
- ☐ Unlimited product attributes
- ☐ Attribute sets for quick product creation of different item types
- ☐ Inventory management with backordered items, minimum and maximum quantities
- ☐ Batch updates to products in admin panel
- ☐ Automatic image resizing and watermarking
- ☐ Advanced pricing rules and support for special prices
- ☐ Search results rewrites and redirects
- ☐ Moderated product tags and reviews
- ☐ Customer personalized products – ability to upload images and text (i.e. for embroidery, monogramming, etc.)
- ☐ Customer sorting – define attributes for customer sorting on category (price, brand, etc.)
- ☐ RSS feed for low inventory alerts

---

---

---

---

### Catalog Browsing

- ☐ Layered / faceted navigation for filtering of products in categories and search results
  - ☐ Filter products by price and display a range of prices based on even increments or by a similar number of products within each range
- ☐ Static block tool to create category landing pages
- ☐ Product comparisons with history
- ☐ Configurable search with auto-suggested terms
- ☐ Breadcrumbs
- ☐ Ability to assign designs within category and product level (unique design per product or category)
- ☐ Recently viewed products
- ☐ Popular search terms cloud
- ☐ Product listing in grid or list format

---

---

---

---

### Product Browsing

- ☐ Multiple images per product
- ☐ Product image zoom-in capability
- ☐ Related products
- ☐ Stock availability
- ☐ Multi-tier pricing upsell
- ☐ Product option selection
- ☐ Grouped products view
- ☐ Add to wish list
- ☐ Send to a friend with email
- ☐ Share on Facebook

---

---

---

---

System	Custom Requirements
Example: Related Product Selection "one-click" Selection	We would like related products to be added to the cart at the same time without going to each product or hitting "add to cart" multiple times. We sell furniture so often customers are looking at a chair and ottoman but would like to add a related coffee table, side table, and couch. Below the main product should be a list of related products, a short description and price. Next to each product is a checkbox that the customer can check to add these products to the cart at one time.

## Integration With Other Systems

If this is a new venture you may not need any integration with other systems and can skip this section, but if you need to streamline your operation, integrating with other systems may be necessary.

Use the space below to describe any integration requirements with other systems. This doesn't need to be technical, just describe how this should work in an ideal situation. What problem does the integration solve?

System	Integration Requirements
Example: Warehouse Management	We currently enter our order manually into our warehouse management system, creating a bottleneck and the occasional incorrect entry results in a messed up order. Our warehouse management system is a custom built system that runs off a SQLServer database.