Website Implementation Brief

A. CLIENT DETAILS

Business Name: _____

Contact Name: _____

Contact Phone No: _____

B. ONLINE BUSINESS GOALS

Please number these in order of priority for your online business. This will aid in focusing your online business goals.

- ☐ Capturing leads for your products/services
- ☐ Building a customer database for marketing purposes
- ☐ Selling products/services online
- ☐ Capturing bookings for your events
- ☐ Building a community around your business
- ☐ Service your existing customers/provide "Member Only" content
- ☐ Other: _____

Primary Goal & "Calls to Action"

Please list the primary goal of your site - what you most want your visitors to do. e.g. "I want to grow my customer database." Or "I want to sell my products online."

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C. GLOBAL SITE ELEMENTS

Please select the items, functionality or type of content you would like to appear as exactly the same on all pages. This is known as your site template.

- ☐ Navigation menus
- ☐ Newsletter subscription box
- ☐ Site search box
- ☐ Product search box
- ☐ Member only sign in
- ☐ Print this page

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- ☐ Site breadcrumbs

Any other items (please list below)

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D. ONLINE BUSINESS FUNCTIONALITY

Please select the online business functionality you require on your website. Keep in mind that these should be consistent with your online business goals in section B.

Some of these may fall outside the scope of the original proposal. In this case, we will contact you, explain any extra charges, and ask if you wish to go ahead.

- ☐ Email marketing
- ☐ Online shopping catalogue
- ☐ “Contact Us” web form
- ☐ Payment collection web form (for non eCommerce items)
- ☐ Discussion Forums
- ☐ Blogs
- ☐ Member Only area
- ☐ Event bookings
- ☐ Searchable article database
- ☐ News / announcements
- ☐ Frequently asked questions
- ☐ Document / brochure downloads

E. SITEMAP & NAVIGATION

Please write down the pages you want to appear on your website and briefly describe each page’s purpose. Each of these pages will appear on the site’s main navigation menu unless you indicate otherwise.

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F. CONTACT US FORM

Contact Us forms capture useful information about your customer. List any special questions or data you would like to collect on your Contact Us form. Remember to keep it concise and simple as possible.

G. EXISTING SITE DETAILS

What is the domain name you wish to use for this site?

Please list the details of your domain name registrar, including your username and password to change the DNS details of this domain.

What type of mail service will you be using? Please list the details of your current Email Service Provider, including your mail server's name and IP address.

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H. NEW DOMAIN NAME DETAILS

This section is only for those without an existing website.

What domain name would you like? List your top 4 preferences in order.

_____

_____

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I. WHO ARE THE USERS OF THIS SITE?

Please list each user's full name, mobile number and email address (or their proposed email address) and desired system password.

For each user, describe their role in the organization and what they will be using the website for (e.g. Tom Jones - Salesperson, follow up leads; Jill Wilson - marketing/web master, will coordinate email campaigns).

Full Name	Mobile	Email Address	System Password	Role

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J. EMAIL ALIASES (OPTIONAL)

If you are using this service for email, please outline the email aliases you want to capture (e.g. sales@yourcompany.com, accounts@yourcompany.com) and which of the above users should be responsible for which alias.

User Email	Aliases

K. WORKFLOW ALERTS

Who should be notified of the following, and how they should be notified (via email and/or SMS). If everyone can be notified, write “All”, or “N/A” if not applicable. Any exclusions or instructions provide in the other instructions column.

Please print clearly

	User Email	Notify via SMS?	Other Instructions
Online Orders			
Contact Form Submissions			
Online Bookings			
Other items (as discussed with your representative)			

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	User Email	Notify via SMS?	Other Instructions

What is the primary contact email address for your business? e.g. info@yourbusiness.com.

Full Name	Email Address

L. EMAIL MARKETING SET UP

This section is optional, and may incur extra cost. Email marketing includes many email layouts to get you started.

Will you require an Email Marketing Template that contains your brand, customized for your email marketing campaigns?

☐

Do you require multiple lists, or customer segments, to send different newsletters? Please list them below. e.g. Monthly News, Members Only

_____

_____

_____

M. Customer Database Set Up

This section is optional, and may incur extra cost.

Do you have an existing database (from ACT, Outlook or other) that you would like to import into the system?

☐

Would you like these people added to an email marketing list or member only area?

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If yes, you will need to provide an import file in the standard format. If you have more than one list then you will need to supply each list in a separate list file. Your representative will provide guidance on this.

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N. eCommerce Set Up

This section is optional, and may incur extra costs. Would you like us to set up your payment gateway for you*? If so, please provide your account number and password. (For PayPal, please provide your account email address and “PayPal Payment Data Transfer Token”)

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Would you like us to set up shipping options for you? If so, list your shipping options below, with desired shipping prices next to them. You may list up to 6.

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Would you like us to complete your product import? If so, prepare your products in an excel file using the appropriate template file (which we will provide in due course). Images should be supplied separately.

☐

** You will need a merchant account with your bank, a payment gateway account with any supported payment gateway, or an account with PayPal. Please note that payment gateways have a transaction charge for each sale you make.*

We support several Payment Gateways;

- DPS (US, UK, AU, NZ, ZA, SG, MY and Pacific Islands)
- Authorize.net (US only)
- EWay (Australia only)
- ESec (Australia only)
- PayPal Website Payments / Standard
- DPS PX Pay (3DSecure)

You will need to sign up with one of the above.

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