

Commerce Questionnaire

Abbreviated:

- What products do you sell, and what problems do you foresee selling them online?
- How much do you expect to sell online per month in dollars? And what is your average sale?
- How do you ship your products, and what shipping options do you provide your customers?
- How do you currently accept payments online? If not at all, do you have a payment partner?
- What states or countries are you required to collect taxes on purchases?
- Do you plan to or currently provide coupons, discounts or gift cards?
- What integrations are required to sell your products online? What inventory or fulfillment services do you use?
- Do you plan on collecting user data or providing different options to members?

Extended:

Products:

- How many products do you plan to sell online?
- Will you be selling physical products?
- Will you be selling downloadable products?
- Will you be selling subscriptions to a service or product?
- Will the products require images? If so, how many? Will there be a gallery of images per product?
- Will your products be accompanied by any media like videos or mp3s?
- Do any products have attributes that affect the price? Ex: XXXL tshirt adds \$2, or an add-on changes shipping weight by 10lbs, etc.
- Do the products have related items? Ex: "if you like this, you might also like..."
- Will you be tracking inventory of your products?
- Do you allow backorder of your products?
- Do you sell your products in different ways to different users? Ex: Retail vs. wholesale. As Brand1 vs. Brand2.
- Do you require special instructions on ordering of certain products? Ex: Text of an embroidery option, or Gift message
- Will you be allowing your customers to comment on your products?
- Do you plan on providing user reviews/ratings of your products? If so, do you already use an existing service to do so?

Shipping:

- What shipping providers do you use? Ex: UPS, USPS, FedEx, etc. - What shipping options do they provide?
- Do you have negotiated rates with a shipper?
- Will you be shipping your products from in-house?
- Do all of your products get shipped by the same person, or are multiple people involved in shipping your products? Ex: One person packages and ships tshirts and a different person packages and ships posters.
- Do you provide or require different shipping options for different types of products?
- Do you have any shipping rules to various locations? Ex: USPS required for Hawaii & Alaska
- Do you charge differently for special shipping by dimensions/weight?

- Do you offer flat rate shipping?
- Can customers optionally pick-up their order?
- Will you be charging Handling fees? If so what are they and in what cases?

Payments:

- Do you currently have an online payment processor? Ex: Authorize.net, PayPal Payflow Pro, etc.
- If not, do you work with a local payment provider? For example, you may work with a retail partner that provides your credit card swipe machines.
- What payment options do you provide to your customers? Pay with Credit Cards? Pay with e-check? Pay with PayPal? Offer purchase orders?
- Do you need to capture funds in multiple steps? Ex: down payment, or charge when shipped?
- Do you currently collect and record credit card numbers for repeat customers anywhere? If so, where?

Taxes:

- What states are you required to collect taxes on purchases and at what rates?
- Are there any international tariffs or customs charges that you anticipate when selling your products internationally?
- Do you sell products to tax-exempt organizations? If so, how do you currently manage and confirm those exemptions?

Coupons, Discounts & Gift Cards:

- Do you currently provide coupons?
- If you use coupons, how do you do it? Is there a service you integrate with? Or manually make them?
- What discounts do you provide if any? Ex: Are there discounts for purchasing a certain dollar amount? Or purchasing multiples of an item?
- Do you participate in any social discounting services like Groupon or LivingSocial?
- Do you currently provide the sale of Gift Cards? If so, who is your provider?
- Do you plan on selling gift cards in your online store?

Integrations:

- What software integrations do you require to sell products?
- Do you work with a fulfillment company for drop-shipping online orders?
- Do you maintain an inventory system that your online store must integrate with?
- Do you sell products anywhere else online that need to be considered?
- Do you sell products with a physical in-shop Point of Sale system that requires integration?
- Are there any other actions that are required when an online order is submitted?

Users:

- Do you want or allow repeat visitors with logins, or do you prefer guest-only purchases?
- Do you track members or require membership to purchase items?
- If so, how do you currently manage and track membership?
- What kind of data do you collect on members. Ex: personal photo, purchase history, location data, etc.
- Does that member data have to be updatable by the member, or only by you?
- Do you collect and store sensitive data from your customers? Ex: Social Security Number, Date of Birth, Credit Card #s?

Layouts:

- What layouts will be required to present your products? Ex: Main Landing, Category Landing, List, Detail
- Will searching be required of the products in your store?
- Do you plan on using tags to relate items and categories?
- Is there anything special about how you plan on presenting your products online?

Other:

- How much do you expect to sell online per month in dollars?
- How much is your average purchase?
- Are your products broken down into major categories? Ex: Products, Accessories. or Shirts, Hats, Gloves. etc.
- What data do you need regarding your sales, products, and inventory reporting?
- Who is to be notified when an online purchase has been made?