

The Sitemason Commerce Questionnaire is broken into two sections. “Abbreviated” is a good place to start to limit the client being completely overwhelmed. Use the answers from the abbreviated questionnaire to move to the longer form “Extended”, which will get into details.

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?