Client name/logo

Date

Revision

Author(s)

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1. **Quotation**

**1.1 Overview**

*Text…*

*Possible items to discuss in your project…*

*Current scope of the project is:*

*• Maintain client in the database*

*• Contact details*

*• product available*

*• quantities available*

*• Commission*

*• items already sold*

*• Maintain buyers in the database*

*• Shopping cart*

*• Product codes or services codes*

*• Details of items and services*

*• Cost*

*• Cost of items*

*• Cost of postage/delivery*

*• Cost of commission*

*• Images*

*• Descriptions*

*• Availability*

*• Dates or number of items*

*• Number of people per tour*

*• Summer or winter seasons*

*• Public holidays*

*• Delivery times for products*

*• Payment gateway*

*• Paypal*

*• CommBank ?*

*• NetBank?*

*• Commission calculator based on % of service or product sold*

*There are several main components to this project:*

*• Website (front-end)*

*• Administration Portal*

*• Access CMS*

*• Access Update database of clients/customers -Client Resource Management*

*• Update shopping cart*

*• Reports (to be defined)*

*• Content management system integrated into your website*

*• Shopping cart*

*Outline the steps and deliverables you will take over the duration of this project.*

1. **The Project**

**2.1 Overview**

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**2.2 Client Goals**

**2.3 Objectives**

**2.4 Assumptions and Constraints**

**2.5 Dispute Resolution**

.

**2.6 Stakeholders**

**3.0 Document**

**3.1 Purpose**

**3.2 Audience**

.

**3.3 Control Statement**

**3.4 Sign-off**

**4.0 Design**

**4.1 Research**

**4.2 Style Tile and Guide**

**4.3 Design and layout ideas**

**4.4 Sitemap**

**4.4 Wireframes**

**4.5 Final Design**

**5.0 Functionality**

**5.1. Website**

Clients/customers will be able to view information, promotional material, products, services and any other information. They will be able to use the shopping cart to purchase products/services relating to services/products. There will be a contact form for general inquiries.

Staff will be able to manage the website using the CMS (Content Management System) and the Shopping Cart. Staff will also be able to maintain contact information using the CRM (Client Resources Manager).

Here are most of the features which will be available via this new website.

**5.2. CMS**

**5.2.1. Simplicity**

Simplicity makes it possible for you to get online and get publishing, quickly. Nothing should get in the way of you getting your website up and your content out there. WordPress is built to make that happen.

**5.2.2. Flexibility**

With WordPress, we can create any type of website you want: a personal blog or website, a photoblog, a business website, a professional portfolio, a government website, a magazine or news website, an online community, even a network of websites.

**5.2.3. Publish with Ease**

If you’ve ever created a document, you’re already a whizz at creating content with WordPress. You can create Posts and Pages, format them easily, insert media, and with the click of a button your content is live and on the web.

**5.2.4. Publishing Tools**

WordPress makes it easy for you to manage your content. Create drafts, schedule publication, and look at your post revisions. Make your content public or private, and secure posts and pages with a password.

**5.2.5. User Management**

Not everyone requires the same access to your website. Administrators manage the site, editors work with content, authors and contributors write that content, and subscribers have a profile that they can manage.

This lets you have a variety of contributors to your website, and let others simply be part of your community.

**5.2.6. Media Management**

They say a picture says a thousand words, which is why it’s important for you to be able to quickly and easily upload images and media to WordPress. Drag and drop your media into the uploader to add it to your website. Add alt text, captions, and titles, and insert images and galleries into your content. We’ve even added a few image editing tools you can have fun with.

**5.2.7. Full Standards**

Compliance Every piece of WordPress generated code is in full compliance with the standards set by the W3C. This means that your website will work in today’s browser, while maintaining forward compatibility with the next generation of browser. Your website is a beautiful thing, now and in the future.

**5.2.8. Built-in Comments**

Your blog is your home, and comments provide a space for your friends and followers to engage with your content. WordPress’s comment tools give you everything you need to be a forum for discussion and to moderate that discussion.

**5.2.9. Multilingual**

WordPress is available in more than 70 languages. If you or the person you’re building the website for would prefer to use WordPress in a language other than English, that’s easy to do.

**5.2.10. WordPress CMS Security**

Here is more information about the security of WordPress as a CMS framework:

https://wordpress.org/about/security/

**5.2.11. Your Entire Workflow**

WordPress can take the place of your entire workflow from the initial draft to the time you hit publish – spelling, grammar, collaboration, and review – there’s no need for e-mails back and forth or expensive desktop software.

**5.2.12. Beyond Black and White**

Everything that makes web pages feel rich – pictures, videos, music, documents – can feel right at home in WordPress. With a drag-and-drop file uploader that uses the latest technology to ensure your file effortlessly makes it to the web page every time, and a media browser to help you store, organize and find the files you’re looking for, WordPress hosts the files that make your pages pop.

**5.2.13. Never Lose a Word**

WordPress automatically saves your work as you type so you don’t have to worry if your computer crashes or you make a mistake. Want to go back to a previous version? Not a problem. Every time you hit save, WordPress creates a snapshot that you can restore with a single click.

**5.2.14. Scheduling**

WordPress lets you schedule posts for some time in the future or lets you backdate a post for some time in the past so that you can write when it’s convenient for you.

**5.2.15. Publish Anywhere**

The internet’s everywhere, so why shouldn’t your workflow be? WordPress has mobile applications for Android, iOS, Blackberry, Nokia, Windows Phone 7, even WebOS. Wherever you are, control of your site is literally at your fingertips. Phone not listed? No fret. You can even post to your site by e-mail.

**5.2.16. Password protection**

You can give passwords to individual posts to hide them from the public. You can also have private posts which are viewable only by their author.

**5.2.17. Multi-paged posts**

If your post is too long, cut it up into pages, so your readers don’t have to scroll to the end of the world.

**5.2.18. Save Drafts**

Save your unfinished articles, improve them later, publish when you’re done.

**5.2.19. Previewing Posts**

Before you press the “Publish” button, you can look at the preview for the article you just wrote to check if everything is the way you want it. In fact, you can do that at any time, since the preview is “live”.

**5.3. Shopping cart**

**5.3.1. Payment gateways**

Gateways can include: Direct Bank Transfer, Cheque Payment, Cash on Delivery, Credit card payments with PayPal. Additional Payment gateways: Add additional Payment Gateways to your store, enable role based payment shipping methods, use advanced rules to control the countries/states you wish to sell in and control which payment gateways and shipping methods are available during checkout. You can also choose which payment gateways to display for different countries (should you wish to), as determined by a customer’s address. Most popular? Amazon Payments, Stripe, Authorize.Net, PayPal Pro/Advanced/Express, PayFast, FirstData, Simplify Commerce and Braintree. For now, I would recommend starting with PayPal.

At the moment, your store can handle anything from one product to thousands. Add and manage products:

Quickly add products to your store, select images sizes for catalog, single product and thumbnails. Selectively enable a lightbox for product images.

**5.3.2. Product types**

Simple Product, Grouped Product, External/Affiliate Product, Variable Product and Virtual/Downloadable Product. Product variables: The shopping cart lets you offer a set of variations on a product with control over prices, stock, image, and more for each variation (i.e. for a product like a shirt, you can offer a large, small, etc).

**5.3.3. Inventory management**

You can manage your store’s inventory easily, track stock levels, hold stock for a period if an order is cancelled, receive notifications to a custom email address (for both low and out of stock items), hide out-of-stock items and more.

**5.3.4. Payment Extensions**

Some extensions cost extra. Additional product types available: Subscription Product, Bookable Product, Pre-Order Product, Measurement Based Product, Bundled Product, Chained Product, Composite Product, Force

Sell and Add-ons.

**5.3.5. Most popular?**

Product Add-ons, Dynamic Pricing, Product Bundles, Create groups, Variation Swatches and Photos, Min/Max quantities, Brands, Name your price, Composite Products, Product Vendors, Advanced Notifications, Waitlist and Pre-orders.

**5.3.6. Shipping Calculations**

Enable shipping option choices within your store.

**5.3.7. Cart Calculator**

You can enable a shipping calculator on the cart page.

**5.3.8. Shipping prices**

Optionally hide shipping costs until an address is entered. Flexible shipping destinations: Select from shipping address and billing address or only ship to users billing address.

**5.3.9. Restrict sales**

Restrict shipping locations by country.

**5.3.10. Multiple Shipping Methods**

Flat rate, International Shipping, Local delivery, Local pickup or Automatic which chooses the cheapest method available. Or even offer free shipping.

**5.3.11. Shipping Extensions**

Some extensions cost extra. Additional shipping options available through extensions: Local Pickup Plus, Per Product, Table Rate Shipping, USPS Shipping, UPS Shipping, FedEx Shipping, Ship to multiple addresses and Role based payment/shipping methods. Other popular extensions: Print Invoices & Packing lists, Shipment tracking, Advanced notifications and Postcode/Address Validation.

**5.3.12. Control your taxes**

Taxes are the last thing you want to think about when setting up your shop and one of the last things your customer wants to think about when buying online. So we’ve made it simple, included in core.

**5.3.12.a Custom tax calculations**

Taxes can be calculated based on your customer’s shipping address, billing address or your stores base address.

**5.3.12.b Geo-location enabled taxes**

Based on your location, shopping cart can automatically calculate major country and state tax rates.

**5.3.12.c Select customer address**

Allow your store to select your customer’s address from either none as default, your store’s base address or by geolocating the customer’s address.

**5.3.12.d Control tax classes**

Optionally control which tax class shipping gets, or leave it so shipping tax is based on the cart items themselves.

**5.3.12.e Control the display of taxes in your store**

Select if prices are displayed in the shop excluding or including tax. Select if prices are displayed during cart and check excluding or including tax and select if tax totals are displayed itemised or totalled.

**5.3.12.f Define tax rates**

Choose from standard rates, reduced rate rates or zero tax rates.

**5.3.12.g Tax Extensions**

Some extensions cost extra. Additional options: Use our Taxamo Integration to keep track of and handle all of your EU VAT rules to keep your shop in line with the new laws starting in 2015. You can also automate your tax with one of our extensions for TaxJar, Xero or Freshbooks.

**5.3.13. Reporting**

Sales reports can show both net and gross amounts you’ve earned. We’ve added a print

stylesheet, and added extra data on refunds to reports.

**5.3.14. Dashboard**

We’ve worked hard to make the storeowner dashboard helpful. It includes sales orders, traffic and an at-a glance status summary window.

**5.3.15. Analyse products and orders**

Gain insight into your products and orders. Track sales and growth trends.

**5.3.16. Reporting Extensions**

Some extensions cost extra. Additional options: EU VAT Rules, Cost of goods, Cart reports, SMS notifications, Customer history, Sales report emails, Anti-fraud, Coupon Campaigns and Recommendations.

**5.3.17. Control customer account registration**

Choose to allow customers to register on the checkout page or account page and/or display a returning customer login reminder on the checkout page.

**5.3.18. Customer accounts**

Allow customers to generate their username from their customer email, easing the account creation process.

**5.3.19. Automatic passwords**

Decide if you want to automatically generate customer passwords for customers.

**5.3.20. One-click refunds**

By using the Simplify Commerce, PayPal payment gateway or any other supported gateway, you can offer pain-free refunds to customers.

**5.3.21. Product variables**

Select unit weight and dimensions.

**5.3.22. iOS app**

Keep your finger on the pulse of your online shop. With iOS, your shop catalog and performance reports are readily available on your iPhone. Quickly accessible and beautifully presented.

**5.4 Client Resource Management Tool (CRM)**

• Touchpoints. Track every interaction.

• Tribes. Segment your Humans (Clients} based on groups that are relevant to you.

• Integrations. Extending the awesome.

• Dashlets. Quick ways to interact with CRM data.

**5.4.1 Email List Building**

Automate your marketing by syncing your people tribes with your mailing lists using the MailChimp add-on.

**5.4.2 Touchpoints**

Track every interaction. This could be a meeting, a contact form submission, a phone call, an email, or a purchase on your website.

**5.4.3. Meetings**

Schedule meetings with your people using TouchPoints. Add notes to your meeting TouchPoints so you remember what you talked about later.

**5.4.4. Attachments**

Attach all the things! Attach documents or any allowed file type to any TouchPoint.

**5.4.5. Tasks**

Create tasks for yourself or assign them to others. Task TouchPoints make work a little more fun and easy.

**5.4.6. Due Dates**

Schedule your tasks, meetings, and other TouchPoints using the TouchPoint due dates.

**5.4.7. Dashboards**

Get a quick view of your upcoming tasks and favorite people/clients using WordPress dashlets.

**5.4.8. Search**

Search for your people/clients and TouchPoints using the built in WordPress search tools. You can also filter by Tribes, Tags, or Date.

**5.4.9. Integrations**

We’re committed to expanding integrations with WordPress premium tools as well as third party tools.

**6.0 Testing**

**6.1 Website accessibility and cross browser test**

• Is the website accessible and do all pages display correctly across all of the common browsers?

• Does all content display correctly from the CMS?

• Do the products/services from the shopping cart display correctly?

• do we have correct sitemap

• do we have the correct Terms of Conditions and Acceptable Use Policy?

• Is the 404 page working?

**6.2 CMS**

• Does all content display correctly from the CMS?

• Can all pages linked to the CMS be updated?

• Can images/content be uploaded and updated?

• Has the Administrators been set up and tested?

• Is the text editor interface working to expectations?

• Can the administrator add content?

• Can the administrator add menu items?

• Do we have all relevant content in the correct pages

• Is there any missing content?

**6.3 Shopping cart**

• Is there a solid interface between the front-end and the shopping cart?

• Does all content display correctly from the Shoping cart?

• Can the cart have products added/edited/removed with product codes, prices, images, description?

**6.4 Search Engine Optimisation**

• Have the correct META tags, content, semantic code been added to the site?

• Have we submitted the site to GOOGLE and other Search Engines?

• Have we registered the site with GOOGLE WEBMASTER Tools?

• Do we have a REPORTS section for client viewing?

**6.5 CRM**

• Does all content display correctly from the CRM?

• Can we add/edit/remove any CLIENT codes, images, description, dates, comments?

**7.0 Documentation**

• Has the Technical Document been updated?

• Has the User Documentation been updated?

• Have both documents been made available to all stakeholders?