ECOMMERCE
BUSINESS PLAN
WORKBOOK

Name:
Date:
Business:

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Introduction

A good ecommerce business plan is one of the most crucial sections of your overall business plan.

Its purpose is to delineate all the details of your e-commerce business, determine the financial and operational needs of the business, examine growth potential and attract potential investors. A solid business plan is also crucial when considering applying for business grants and loans as well as obtaining a physical space for retail.

A solid e-commerce plan contains quite a bit of information and this workbook will provide you with the framework you need to put a plan in place. The following pages will walk you through these crucial parts of your plan.

PART 1

Company Overview

This section of your business plan will answer two fundamental questions: Who are you and what do you plan to do?

Answering these questions provides an introduction to why you're in business, what value is your business bringing to the marketplace, what you have going for you, and why you're a good bet if you're asking for investments (however, clarifying these details will still be a useful exercise even if you're the only person who ever sees it).

It's an opportunity to put to paper some of the more intangible facets of your business, like your principles, ideals, and cultural philosophies. Here are some of the components you should include in your company overview:

Are you a limited liability company (LLC), DBA, sole proprietorship, general partnership, or an incorporated company?

What do you sell? Include a short overview of all products or services you offer.

Think of the broad category of products you sell to identify your industry. Some examples could include "women's fitness" or "independently published books."

This type of information will be covered in this workbook.

Business Formation

It is important to set a solid foundation and protect your business from the beginning. Below are the most common steps required in forming and registering a business with the state and federal government.

CHOOSE A BUSINESS STRUCTURE

- ☐ Sole-Proprietor
- ☐ Limited Liability Company
- ☐ Corporation (C-Crop, S-Crop)
- ☐ Non-Profit

TIP: Consider the tax benefits of each structure

CREATE A BUSINESS NAME

- Trademark Research- www.USPTO.gov
- State Business Search
- Use this link to make sure the name is available on major social media platforms
  https://bit.ly/3zCuE8X

REGISTER YOUR BUSINESS

- Secretary of State (Articles of Inc./ Formation) IRS.gov (EIN)

TIP: Check for permits, licenses, and insurance requirements.

SET UP YOUR BANK ACCOUNT

- Research Banks and Credit Unions (promotions, requirements, business benefits, etc.)

TIP: Do not co-mingle funds!

To learn more about business formation click this link https://bit.ly/3HJMvhk.

To learn more about business funding click this link https://bit.ly/3HJZ6kp

Company Overview

Please write your company overview below.

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Company Values

Company values are the set of guiding principles and fundamental beliefs that help a group of people function together as a team and work toward a common business goal. These values are often related to business relationships, customer relationships, and company growth.

To define your company values, think about all the people your company is accountable to, including owners, employees, suppliers, customers, and investors. Now consider how you'd like to conduct business with each of them. As you make a list, your core values may start to emerge.

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Mission Statement

A mission statement is a way to clearly state the purpose your company serves. It should cover what your business does, and why it does it. Mission statements are generally a single sentence or a short paragraph.

Lastly, since mission statements outline a company's ongoing purpose, they typically don't change much over time.

Write your mission statement below.

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Company Vision

A vision statement is a business document that states the current and future objectives of an organization. A company vision statement must align with its mission, , culture, and core values. A clear concise vision statement can be used to help set strategic goals. Vision statements are not necessarily set in stone, as your business grows your vision will expand.

Next you can craft your vision statement. What impact do you envision your business having on the world once you've achieved your vision? Phrase that impact as an assertion—begin the statement with "We will…" and you'll be off to a great start.

Business Objectives

You'll want to include both short-term and long-term goals in the company overview section of your plan. In the context of a business, short-term goals are generally ones you plan to achieve in the next year, while long-term goals are ones you're aiming for in the next 1-5 years. When including them, make sure your goals are all S.M.A.R.T.: Specific, measurable, attainable, realistic, and time-bound.

Short Term Goals:

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Long Term Goals:

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Market Analysis

It's no exaggeration to say that your market can make or break your business. Choose the right market for your products—one with plenty of customers who understand and need your product—and you'll have a head start on success. On the other hand, with the wrong market, or the wrong timing in a previously-right market, you may find yourself trying to offload products to customers who are only lukewarm about them.

This is why your market analysis a key section of your plan, whether or not you ever intend for anyone else to read it. It should include an overview of how many customers you estimate there are for your products, an analysis of your business' position in the market, as well as an overview of the competitive landscape. Thorough research to support your conclusions will be important both to persuade investors and to validate your own assumptions as you work through the plan.

Marketing Plan

Your marketing efforts are directly informed by your ideal customer and your plan should outline your current decisions and your future plans, with a focus on how your ideas are a fit for your ideal customer. If you're planning to invest heavily in ads on Instagram, for example, it might make sense to include whether Instagram is a leading platform for your audience.

Most marketing plans include answers to four key questions, in as much detail as makes sense for your plan's goals. This includes marketing expenses, estimated prices, potential marketing channels and the metrics used to measure success.

Marketing Expense Name	Estimated Price
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Marketing Channels

To reach out to customers and deliver a product or service, businesses rely on sales channels, which are touchpoints between them and consumers. Some examples of popular sales channels are social media platforms, Google, Amazon, Etsy and Ebay etc.

Name Of Channel	Purpose of Channel
1.	1.
2	2
3	3
4	4
5	5

Metrics to measure success

_____
_____
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COMPETITOR ANALYSIS

WHO ARE YOUR TOP 3 COMPETITORS?	WHAT ARE THEY OFFERING?

WHAT ARE THEIR STRENGTHS AND WEAKNESSES?

Strengths	Weaknesses

HOW ARE THEY REACHING THEIR CUSTOMERS?

Are they reaching new customers through ads, youtube content, blog posts etc.

How did you find out about them?

WHAT IS YOUR COMPETITORS' PRICING?

This gives you an idea how much you should/can charge.

Business Overview: What?

This page can help you get clear on WHAT you are selling and WHY people would need to buy it. The more effort you put into crafting a great plan upfront, the easier it will be to set up your business .

What product(s) do you plan to sell?

What makes it special or unique?

What problems does your product solve?

Business Overview: Where?

This page can help you get clear on WHERE you are going to market your products. Products can be sold by paying for traffic or for FREE depending on your marketing strategy.

How will you get your products in front of your ideal customer?

Where will you sell your products?

How much does your product cost, and why?

Business Overview: Who?

This page can help you get clear on WHO you are selling to and WHY they buy.

Who's struggling with the problem your product solves?

What specifically are they struggling with?

How do they feel about the problem?

Business Overview: How?

What words can you use or story can you tell to help your customers see your product as the PERFECT solution to problems / feelings you outlined above?

Customer Avatar

Your ideal customer, also known as your target market, is the foundation of your marketing plan, if not your business plan as a whole. As you make strategic decisions, you'll keep this person in mind, which is why an overview of who they are is so important to understand and include.

To give a wholistic overview of your ideal customer, describe a number of general and specific demographic characteristics.

Answering the following questions will help you to develop solid customer segmentation.

Where do they live?

_____

What's their age range?

_____

What's their level of education?

_____

What are some common behavior patterns?

_____

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_____

Customer Avatar Cont.

What do they spend their free time on? Where do they work?

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What technology do they use?

_____

How much do they earn?

_____

Where are they commonly employed?

_____
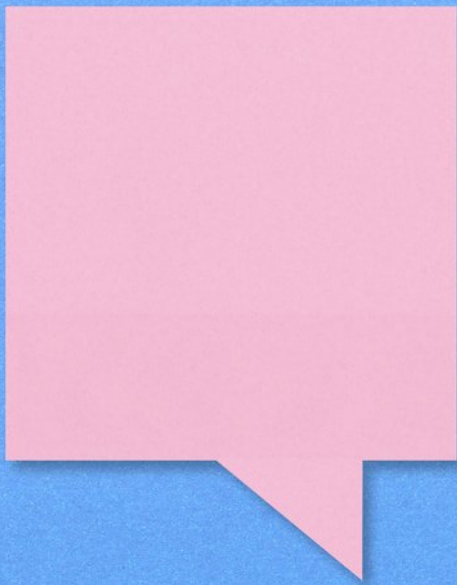
What are their values, beliefs, or opinions?

_____

_____

YOUR BUSINESS GOALS

This page will help you to get clear on your business goals. Knowing where you want to go will help you figure out the right steps to take to make it happen.

How much money would you like to make?
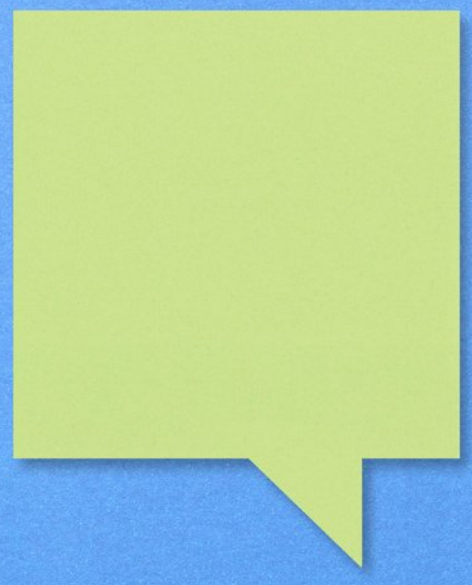
YEARLY	MONTHLY	DAILY
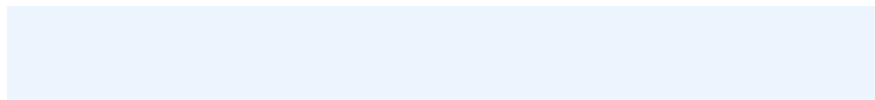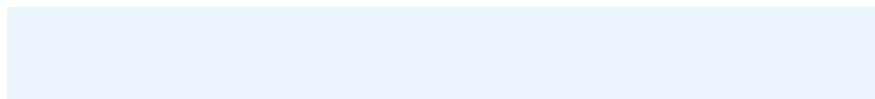
How many services/products do you need to sell to reach each goal?
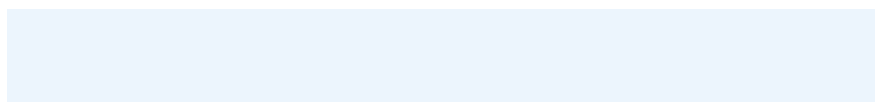
YEARLY

MONTHLY

DAILY

Logistics and Operations Plan

Your logistics and operations are the workflows that you'll implement to make your ideas a reality. If you're writing a business plan for your own planning purposes, this is still an important section to consider, even though you might not need to include the same level of detail as if you're seeking investment.

You'll want to cover all parts of your planned operations, including:

Where do you get the raw materials you need for production or where are your products produced?

How long does it take to produce your products and get them shipped to you? How will you handle a busy season or an unexpected spike in demand?

Where will you and any team members work? Do you plan to have physical retail space? If yes, where?

Equipment

What tools and technology do you require to be up and running? This includes everything from computers to lightbulbs and everything in between.

Shipping and Fulfilment

Will you be handling all the fulfillment tasks in-house or will you use a third-party fulfillment partner?

Inventory

How much will you keep on hand and where will it be stored? How will you ship it to partners, if required, and how will you keep track of inventory?

This above information should give you a basis to make other important decisions, and should be taken into consideration when making decisions like how to price your products to cover your estimated costs and at what point you plan to break even on your initial spending.

PART 2

Resources

1 Shopify

Sign up for a free trial https://bit.ly/3n4oV6Vl

2 Logo Design

Use Looka to design a FREE logo https://bit.ly/3q2QeR8

3 Images

Use Canva.com or Pickmonkey.com to design your banners. Canva enables you to create graphics quickly and easily, even if you have little to no graphic design skills.

4 Taxes

Information on state taxes: TaxJar

5 Payment Gateway

Add *buy now pay* later with SEZZLE. Use the following link to create an account: https://szzl.io/q1wrya

6 Email System

Sign up with Omnisend Marketing: https://bit.ly/3t2pKkt
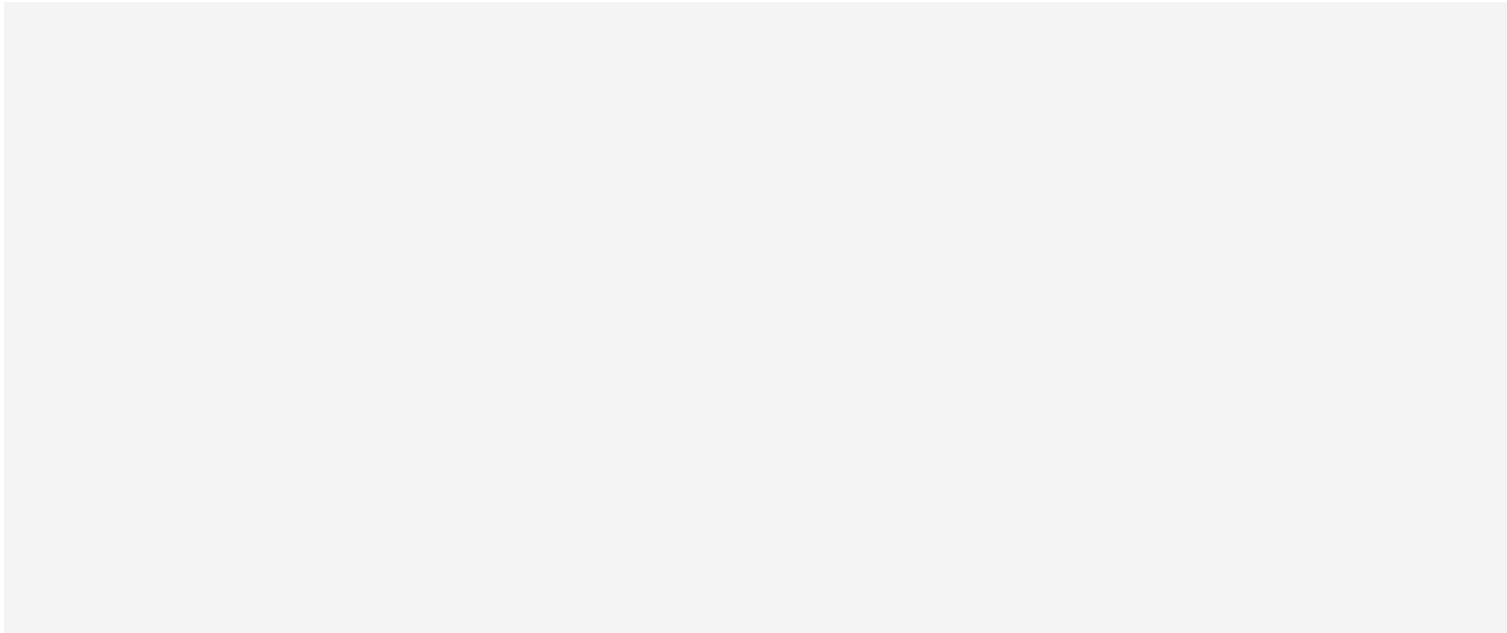
7 Company Branding

Use COOLORS to help with branding colors: https://coolors.co/

Business Branding
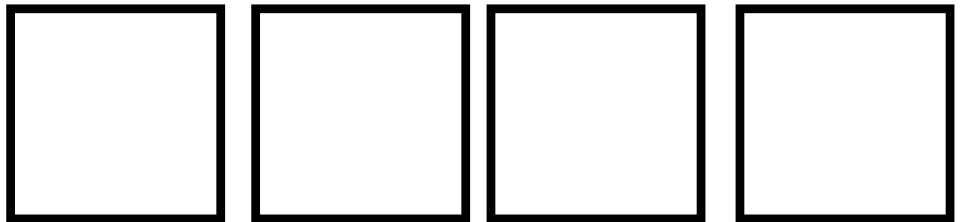
SHOP HERO BANNER DESIGN SKETCH

26
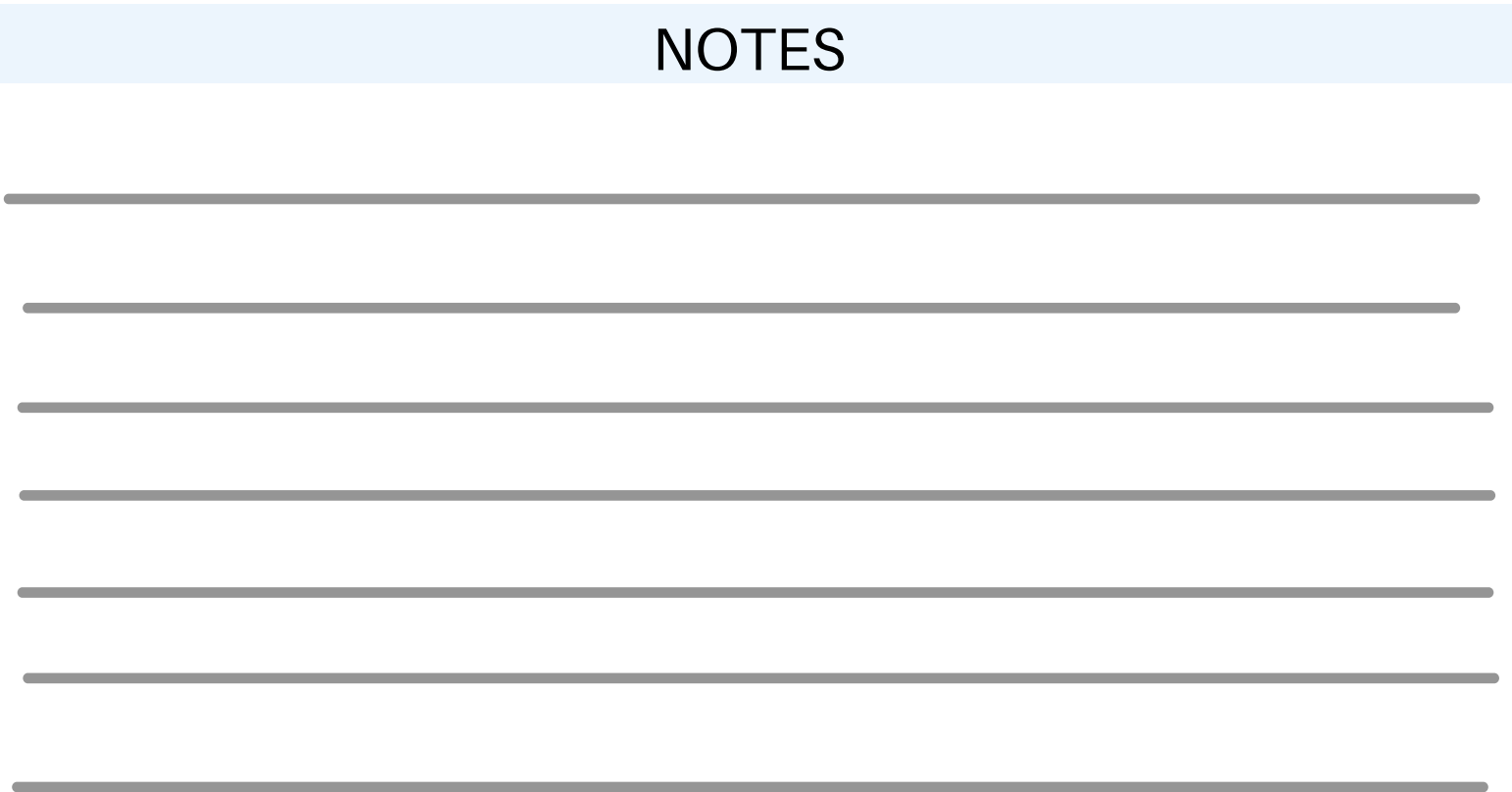
SHOP ICON

SHOP COLOR THEME

NOTES

Your Logo
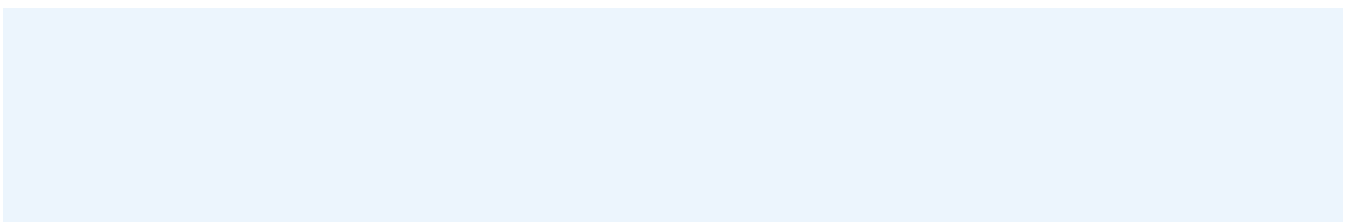
What colors work best to communicate your business?
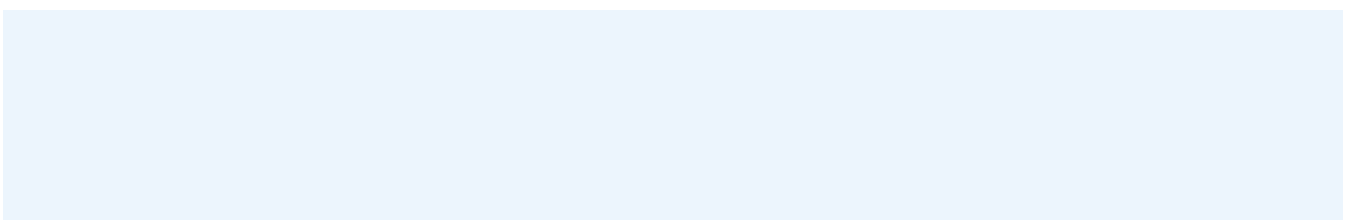
What are the 3 main platforms you will use to promote your brand?

What type of logo works well on these platforms? Square? Circle?

Do you need graphics to help you communicate your brand message?

Fonts and Colors

Select 2-3 fonts that reflect your brand:

1

2

3

Select 2-3 colors that you relate to and express yourself. Write down the hex codes so that you can replicate them perfectly:

1

2

3

What are 3 adjectives your photos/images will have?
Ex: Travel + scenic dramatic photos, photos at work, bright and colorful:

1

2

3

PART 3

E-Commerce Checklist

DECIDE

Ecommerce software	_____	Shopify?
Domain name	_____	Available?
Web hosting	_____	Provider chosen
Email hosting	_____	Provider chosen
Payment gateway	_____	Provider chosen
Shipping options	_____	Carriers & methods to offer
Tax rate	_____	% for state / exempt status
Accounting	_____	Software chosen
Security	_____	Responsibilities
Shipping orders	_____	Whom & how
Customer service	_____	Whom & how
Site design	_____	Theme or designer
Product photography	_____	Whom & how
Product descriptions	_____	Whom & how
Home page text	_____	Whom & how
About page text	_____	Whom & how

PREPARE

- ☐ Signed up.
- ☐ Purchased
- ☐ Purchased or NA
- ☐ Purchased or NA.
- ☐ Purchased or NA.
- ☐ Software bought
- ☐ Tax paperwork.
- ☐ Purchased.
- ☐ Purchased.
- ☐ Supplies purchased
- ☐ Purchased / Hired
- ☐ Photos taken
- ☐ Written
- ☐ Written
- ☐ Written

ACTIVATE

- ☐ Make site visible
- ☐ Point to Website
- ☐ Test and receive
- ☐ Activate
- ☐ Set up on site
- ☐ Set up on site
- ☐ Linked to site
- ☐ Working on site
- ☐ Visible on site
- ☐ Photos on site
- ☐ Product on site
- ☐ Ready to go
- ☐ On site with photo

NOTES

SHOPIFY STORE LAUNCH CHECKLIST

1 **GET READY**

Be sure to work on these items before you open your Shopify store.

PLAN YOUR STORE ● Done

- Brand and store name
- Logo and color pallette
- Tagline
- Exclusive domain

- Browse other stores that you like and use as a reference
- Define product categories and plan navigation structure
- Start browsing Shopify Themes

GET CLEAR ON YOUR PRODUCTS ● Done

SELLING DIGITAL PRODUCTS

- Create digital content
- Edit content to create shareable formats
- Define price structure
- Define product description and product images

SELLING PHYSICAL PRODUCTS

- Get good product picture
- Work on product descriptions including material, details, weight, sizing, and details
- Set inventory
- Create editorial pictures for banners

DROPSHIPPING

- Define product niche
- Choose a model and sources
- Browse and pick products to start.
- Define margins

PRINT ON DEMAND

- Choose print-on-demand platform.
- Pick product
- Work on product design

SHOPIFY STORE LAUNCH CHECKLIST

2 **CREATE YOUR STORE**
Open your Shopify account and start creating your online store.

SHOPIFY ACCOUNT ⬤ Done

- Open a Shopify Account
- Pick a free, custom, or premium template

CUSTOMIZE TEMPLATE ⬤
Done

- Add logo and define header
- Add favicon
- Pick colors, fonts and accent colors.
- Structure home page (add banners, featured products, and collections)

NAVIGATION ⬤ Done

- Create main, secondary, and footer menus
- Define mega-menus (if applicable)
- Add promo bar and pop (if applicable)

CREATE PAGES ⬤

- Blog
- Contact page
- About page

SHOPIFY STORE LAUNCH CHECKLIST

(3) **Add products**
 Add products to your Shopify store.

ADD PRODUCTS	● Done

Digital Products

- Define/set up how customers will receive the digital product they buy
- For digital products download digital products Shopify App

Physical Products

- Add products, images, variants, and descriptions

Dropshipping

- Select and integrate your preferred drop-shipping source
- Pick Products
- Edit Products and product descriptions

Print on Demand

- Select and integrate your preferred print-on-demand app
- Upload your designs.
- Create your products and edit product descriptions (if necessary)

Tips

- If you have a large inventory you can upload your products using an Excel spreadsheet.
- For physical products, it's highly recommended that to add product weight.
- If you have SKUs / UPC Codes, add them.
- You can integrate your store with Quickbooks for better control.
- If you offer subscription products there are many apps that can help you set it up.

SHOPIFY STORE LAUNCH CHECKLIST

4 **SHOPIFY SETUP**
Get ready to launch your store.

GENERAL SETTING ⬤ Done

- Add store address
- Define/create shipping zones
- Set up Store Unique URL
- Set up notifications for orders
- Add Shopping Policies
- Add Privacy Policies
- Add Refund Policies
- Add Store Description
- Remove Store Password Set Up
- Set up other sales channels such as Facebook/ Instagram/ Pinterest/Amazon

PAYMENT SETTINGS ⬤ Done

- Activate Shopify Payments and add your bank details
- Add additional payment methods such as PayPal and Apple Pay

OTHER ⬤ Done

- Download the Shopify App to receive notifications on your phone
- Order a FREE Shopify Card reader included with your account
- Create the first discount for friends and family and share it
- Create a discount on incentive newsletter subscriptions
- Create a Google Analytics Account and add code to your store

Notes

DAY-BY-DAY ACTIONS

DAY 1

CREATE YOUR SHOP SHELL

- [ ] Choose a name for your store
- [ ] Setup your Shopify account
- [ ] Choose your plan level

DAY 2

DESIGN YOUR SHOP

- [ ] Choose your theme
- [ ] Work on your main home page graphic
- [ ] Work on your story for the home page

DAY 3

CREATE KEY PAGES

- [ ] Create your Contact Us page
- [ ] Create your Shipping & Returns
- [ ] page
- [ ] Create your Privacy Policy page

DAY 4

ADD PRODUCTS

- [ ] Create a product page
- [ ] Write out your first product description
- [ ] Upload 1-3 product photos (ideally 2000 x 2000 pixels)
- [ ] Duplicate product page and update for each additional item

DAY-BY-DAY ACTIONS

DAY 5

CONTINUE ADDING PRODUCTS

- [ ] Use the template you set up yesterday to continue building out your product pages
- [ ] Set up any unique collection pages and add links in your shop's Navigation menu

DAY 6

FINALIZE YOUR SHOP

- [ ] Use today to finish up any remaining tasks
- [ ] Set your sales tax jurisdiction
- [ ] Setup your shipping profiles

LAUNCH DAY

LAUNCH

- [ ] CONGRATULATIONS!!! You now have a fully functional Shopify store!
- [ ] EXTRA CREDIT: If you decided to grab Jumpstart, choose one of the strategies and launch your shop with a bang!

Product Description

Use the AIDA formula for your product descriptions. AIDA identifies cognitive stages an individual goes through during the buying process for a product or service. It's a purchasing funnel where buyers go to and fro at each stage to support them in making the final purchase.

ATTENTION

Attention (Awareness): Attract the attention of the customer. Stand out!

INTEREST

Interest: Raise customer interest by demonstrating features, advantages, and benefits.

DESIRE

Desire: Convince customers that they want and desire the product or service and that it will satisfy their needs.

ACTION

Action: Add call to action such as "Get it Now".

Product Keywords

Use semrush.com to research keywords. Brainstorm the keywords for each of your products.

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Product Tags

Use this page for your product tag research. Brainstorm the tags for each of your products.

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Product Inventory

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Discount & Sell on Etsy

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Shop Policies

Write down your Shop Policies here and make them clear for your customers. For example, do you allow returns and exchanges? How will your customers receive the purchased Item?

About Me Page

1. Who is your site for? Who are you talking to?

2. What value is your site providing to the reader?

3. List a few details about yourself.

About Me Page

4. List ways you can show your expertise or why the reader should trust you. What do you bring to the table that other business owners don't?

5. Call to action. What action do you want the reader to take after reading this page?

6. Is there another place in this site that you want to direct the reader? Is there a post or page you want to highlight?

TASK CHART

TASKS	M	T	W	T	F	S
_____	☐	☐	☐	☐	☐	☐
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_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐
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_____	☐	☐	☐	☐	☐	☐
_____	☐	☐	☐	☐	☐	☐

NOTES

PART 4

Your Team

Include an overview of your existing team and any predicted hires and their salaries. While some of these are statements of fact, others will require a bit more thought to define, especially when it comes to your business' vision, mission, and values. This is where you start getting to the core of why your business exists, what you hope to accomplish, and what you stand for.

It's very important before looking to hire or bring on an individual to your team, to define a role that the person will play in your business. Also, consider whether you need help part time or full time.

If it's not in your budget to hire an individual it's ok. You can still grow your business until you get to a point where you afford to hire staff. Also, consider bringing an intern on board.

Conclusion

Remember that when it comes to ecommerce, there's no all-in-one, universal "must-have" team. Just like in many other cases, the employees you need to hire depend solely on your business' needs.

As a brand new business some key roles you may want to fill if it's in your budget:

Social Media Manager

If posting and building a community on social media platforms is not your strength, you might want to think about hiring a strategic social media manager. Creating a following online will help you sell more products/services and boost excitement about your company.

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Personal Assistant

If you find yourself feeling overworked, you might consider hiring a virtual personal assistant (VA). A VA can help you with all your administrative tasks like answering emails, scheduling meetings, setting up and managing your calendar, bookkeeping, and other tasks that tend to pile up. If cost is a factor, not to worry there are many well-qualified freelance virtual assistants around the world at a variety of price points.

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Accounting

Keeping financial records is a responsible activity. An accountant can work in the office or outsource if the paperwork volume is not too large.

First of all, the accountant must help decide on the taxation system to reduce taxation fees and other costs. This person must also keep timely records of all accounting documents, expenses and income, and report to the tax office on time. The accountant's duties may also include invoice registration, payrolls, transactions, etc.

An accountant working with online stores must be thoroughly familiar with the peculiarities of accounting, staff management, and taxation. It's necessary to constantly monitor changes in the legislation, so that the store works absolutely legally, and does not fall under penalties. In addition, an accountant must have good computer/software skills and be able to use special accounting apps.

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Digital Marketing

If your company's website has low traffic and not enough leads/customers, a digital marketer should be able to fix this. Such an expert has all the necessary skills and knowledge on how to drive users to a website and enhance brand awareness.

A digital marketer is more like a manager who supervises several specialists in a team – an SEO specialist, a targeting specialist, a PPC (Pay-Per-Click) specialist (Internet advertising), a designer, and a copywriter.

However, you can often find a multi-purpose warrior who knows how to achieve the company's objectives and handle an expansive range of tasks independently.
Some of the digital marketer's main skills:

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Graphic Designer

Having beautiful, eye-catching images of your products on your site, on your social platforms and in your emails is one the most important aspects of setting up your ecommerce business. Hiring a graphic design freelancer can make your product images stand out from the competition and get your store on the fast track to success. Be sure to work with a freelancer who has direct ecommerce experience for images that really showcase your products.

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Content and Copywriter

For many online business owners, hiring a copywriter is not on the top of their to-do list. But working with the right contract writer can help set the tone of your business and build the entire foundation for your site's SEO. The writer you work with will need to be able to grab the attention of your potential customers while also making your site sound like a credible place to shop.

Cost: _____

Full time/Part time: _____

How Many Days a Week: _____

What Hours: _____

Daily Tasks: _____

_____

Business Trackers

LAUNCH TRACKER

3 Months Before

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

1 Month Before

- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____

2 Weeks Before

- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____
- ☑ _____

1 Week Before

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

SHOP INVENTORY

Month of   Year

Item	Quantity	Price	Date Listed	Sold?

ORDER TRACKER

Month Of   Year

DATE	ORDER #	QUANTITY	CUSTOMER	DONE
				☐
				☐
				☐
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ORDER MANAGEMENT

CLIENT NAME

ORDER DATE   **TOTAL Q-TY**

DELIVERY DATE   **TOTAL PRICE**

PAYMENT METHOD

CLIENT NAME

ORDER DATE   **TOTAL Q-TY**

DELIVERY DATE   **TOTAL PRICE**

PAYMENT METHOD

CLIENT NAME

ORDER DATE   **TOTAL Q-TY**

DELIVERY DATE   **TOTAL PRICE**

PAYMENT METHOD

CLIENT NAME

ORDER DATE   **TOTAL Q-TY**

DELIVERY DATE   **TOTAL PRICE**

PAYMENT METHOD

CLIENT NAME

ORDER DATE   **TOTAL Q-TY**

DELIVERY DATE   **TOTAL PRICE**

PAYMENT METHOD

ORDER FORM

COSTUMER DETAILS

NAME:	
PHONE NO.	EMAIL:
SHIPPING ADDRESS:	
SHIPPING METHOD:	
ORDER NO.	ORDER DATE:
TRACKING NO.	

ORDER STATUS	PACKED	SHIPPED	RECEIVED

ORDER DETAILS

ITEM NO.	ITEM DESCRIPTION	ITEM CODE	QTY	PRICE	TOTAL

RETURNS & EXCHANGES

FROM:	REPORT DATE:
	REPORT ISSUE:
SHIP TO:	DATE OF REPORT/EXCHANGE:

ITEM	ITEM DESCRIPTION	QTY	UNIT PRICE	AMOUNT	

DATE SHIPPED	CREDIT ISSUE
CUSTOMER ORDER #	
DATE SHIPPED	

NOTES

RETURN TRACKER

Order #	Order Date	Return Date	Reason for Return	Received	Refunded
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■
_____	_____	_____	_____	■	■

SHIPPING LOG

Date	Product Name	Customer	Tracking No.	VIA

PURCHASE TRACKER

Month:

Date received	Item	Supplier	Price	Quantity	Cost

SALES TRACKER

MONTH OF			YEAR			
DATE	ITEM SOLD	ORDER #	SALE PRICE.	YOUR COST	FEES	REVENUE

INCOME TRACKER

DATE	DESCRIPTION	SOURCE	AMOUNT

EXPENSE TRACKER

MONTH OF		**YEAR**	

DATE	CATEGORY	DESCRIPTION	AMOUNT

TO DO LIST

Checklist

Notes

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CHECKLIST

65

DATE

NAME

THINGS TO DO	ACTION DATE

IMPORTANT NOTES

Notes