

THE MERCHANT HANDBOOK



[ADD CLIENT LOGO HERE]

Date

10.Oct.2024

Purpose Of The Merchant Handover

Filling out this document is crucial to ensure we fully understand your business goals, challenges, and technical requirements. By providing detailed answers, you help us tailor our approach, deliver a custom Shopify solution, and set clear expectations from the start. This thorough insight allows us to avoid miscommunication, anticipate potential risks, and deliver a project that aligns with your vision, ensuring a smooth and successful collaboration.

How to Fill This Document

To get the most out of this process, please provide as much detail as possible. Be **specific** when describing your goals, challenges, and preferences. Where applicable, include **links to resources** like websites, brand guidelines or design references. The more detailed your answers, the better we can align our approach and ensure a smooth project from start to finish.

Company Overview Questions

1. Why did you start your business? When?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

2. Please provide us with your company details.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

3. How long has your company been in business?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Goals & Objectives

4. What are your primary business goals for this project? What do you want to achieve with your Shopify/Shopify Plus store? (e.g., migrate from other platform to optimise the sales; increase conversions, improve user experience, expand markets, lower costs)

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

5. What is your **estimated timeline for launching the project?** Are there any critical deadlines we should be aware of?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

6. Please list your top competitors and their respective market share.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

7. How are you positioned against these competitors?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

8. What differentiates your commerce offering?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Current Setup & Challenges

9. What platform are you currently using, and why are you looking to switch or upgrade to Shopify/Shopify Plus?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

10. Is your store's category structure organized in a tree format?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

11. Do you have a product filtering structure within collections?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

12. Have you previously had an online store on another platform? What disadvantages did you encounter with that platform?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

13. Which couriers do you plan to use for shipping products to customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

14. What challenges are you facing with your current website that you want to address with this project?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

15. Are there specific features or functionalities you feel are missing in your current setup?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

16. Please describe your product(s).

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

17. What is your annual turnover for last year?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

18. How many people do you employ?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

19. How many locations do you sell in?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

20. Describe your target audience.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

21. Do you have other agencies you work with for paid (PPC, SMM, SEO) marketing initiatives?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Your Business In Numbers

22. What is your average order value (AOV)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

23. How many orders do you process on average per month?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

24. What is your conversion rate (CRO)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

25. In how many regions or countries do you actively sell your products? What percentage of your sales come from repeat customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

26. How much do you currently spend on paid acquisition (e.g., Google Ads, Meta Ads) per month?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

27. What is the primary traffic source to your website (e.g., organic, paid, social)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Business Processes

28. Are there any specific workflows or automation processes that need to be developed for your business?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

29. Are there compliance or legal requirements that need to be considered in the development?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

30. How many SKUs or products will you be managing in the store?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

31. What is your current inventory management process, and do you need any custom solutions for this?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

32. Are there specific product attributes (e.g., sizes, colors, custom options) that require advanced filtering or categorization?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

33. How many attributes do you use to filter your products by? Ex: colour, size, aroma...

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Design & Development

34. What are your primary design goals for the site?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

35. Can you describe the type of design aesthetic you are looking for (e.g., luxury, minimalist, bold, playful)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

36. Please list 5 design references or examples of websites you admire?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

37. What is the customer journey you envision from landing on the homepage to completing a purchase?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

38. Do you have brand guidelines or should we design them? Please insert links (Dropbox, Google Drive etc).

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

39. How do you want users to perceive your brand?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

40. What are the key user actions you want to prioritise?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

41. What are the current UX issues you want to resolve?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

42. Which pages would you like us to design or rebuild in Figma?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

43. Are you interested in a mega menu similar to Amazon.com or eMag.ro?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

44. Will you offer unique services like geo-location based selling?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

45. Do you have specific performance goals for site loading or traffic handling?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

46. What is your expected traffic volume, and do you have seasonal peaks?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

47. How often will your team update site content like blog articles, landing pages?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

48. Do you have any particular behaviours when searching and filtering products on the site?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

49. Do you use any tools for search or product discovery?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

50. Are customizations needed for the checkout process?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

51. Do you sell B2B?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

52. How do you handle returns?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

53. How do you handle shipping?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

54. Do you need multi-currency or multi-language features?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

55. What are your specific SEO requirements for the new site?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

56. Which analytics tools will you need integrated?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

57. Are there specific security measures or compliance regulations to consider?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

58. What post-launch support do you expect after the site goes live?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Custom Features and Apps for Shopify Store

59. Do you need product comparison functionality for customers to evaluate multiple products side by side?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

60. Do you require any third-party integrations, such as CRM, email marketing, loyalty programs, or ERP, PIM systems? If yes, which ones?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

61. What kind of information would you like to see in the "My Account" dashboard? Is basic information (e.g., name, email, address) enough, or do you require custom fields like loyalty points, preferred shipping methods, saved payment options, or subscription details?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

62. How do you handle invoicing? What tools are you using? Please describe the flow from order to invoice sent.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

63. Will you be offering subscriptions for products, and if so, do you want to offer different subscription intervals (e.g., monthly, weekly)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

64. Are product bundles or "buy more, save more" options important for your store? Example: Buy 1 get 1, Buy 3 get 10% off etc

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

65. Do you need a system for product reviews and ratings that can also handle user-generated content, like photos or videos?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

66. Would you like to integrate a loyalty or rewards program to encourage repeat purchases? If yes, please describe the flow. How many points, to whom etc.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

67. Do you require an app for personalised product recommendations based on browsing history or past purchases? Usually AI-based.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

68. Do you need an ability to offer back-in-stock notifications?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

69. Do you need to offer pre-order functionality for products that are launching soon?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

70. Are you interested in offering gift cards?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

71. What about gift-wrapping options for your products? If yes, do you want to allow the user to add custom text like "Happy Birthday"!

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

72. Are there any customer engagement tools (like wishlists, estimated time delivery) required?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

73. Do you have upsell or cross-sell strategies in mind, such as “Frequently Bought Together” or “You May Also Like” suggestions?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

74. Are you interested in offering local delivery?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

75. Do you require live chat on the website?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

76. Do you plan to offer installment options like Klarna (buy now, pay later) or Afterpay?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

77. Do you need tools to sync inventory across multiple locations or streamline fulfilment, like using ShipStation?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

78. How do you manage your inventory? Do you have multiple warehouses? How is inventory synchronization handled between them?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

79. Are you interested in integrating social media feeds or user reviews on product pages, like Instagram Shop or Yotpo?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

80. Would product discovery tools, like a visual search or product quiz be required?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

81. Are there any unique features you've seen on competitors' sites that you'd like to replicate?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

82. Are there any features you're missing that could improve your customers' experience and you want them added to the new website?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

83. How do you manage automatic backups? Only if it applies

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

84. How do you handle GDPR compliance?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Data Migration & Legacy Systems

85. Do you have existing customer or product data that needs to be migrated? If yes, can you provide the volume and main information that needs to be migrated?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

86. Are there any legacy systems or tools that need to be integrated with the new Shopify store? Are you open to changing them? For example, switch to another ERP or PIM.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

87. Migrating content such as product descriptions, images, and blog posts is important. How many SKU do you have? How many articles do you have?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

88. Do you sell digital products such as 3D files, eBooks etc? If yes, please describe what and how many Mb does a file contain on average. If yes - do you have variations of digital products? Is each variation associated with its own product, or does one product include multiple digital variations? Would you like customers to be able to redownload the products from the product page? Do you offer free digital products?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

89. Do you have any media-heavy components such as video or interactive elements?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

ERP & PIM

90. Do you use an ERP? If yes, which.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

91. Do you use an PIM? If yes, which.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Administration and Ease of Use

92. How do you plan to manage your product catalogue? Manual updates or bulk edits using CSV files?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

93. Do you require regular import/export of product or customer data, and what format works best for your team?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

94. How do you currently send your Google/Facebook feeds?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

95. Do you use live chat on your store? If yes, through which application (e.g., Daktela, Gorgias)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

96. Would you like to add icons in the menu categories?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

97. How many types of pricing do you have? (e.g., sale price, crossed-out reduced price, MSRP)

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

98. Would you like to display the delivery time for a product based on available stock? If yes, please provide more details.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

99. Would you like to associate products with different colors without creating variations, treating them as separate products segmented by color/size, etc.?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

100. Do you want to allow customers to "Log in" via Google, Facebook, or other social channels?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

101. Would you like a notes section on the cart where customers can leave messages? For example, a customer who wants the package delivered between 2-3 PM.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

102. Would you like to use labels or badges? If yes, how should they be displayed? Would you prefer adding badges as text or images?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

103. How often do you update product and price lists? Would bulk import/export capabilities be essential for your operations?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

104. Do you have products with multiple variations? If so, how would you like these variations to be added to the shopping cart?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

105. Do you offer proforma invoices to customers? If yes, what is the current flow, and what is your desired or ideal flow?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

106. Do you use Trustpilot or another similar external reviews provider? If so, do you want to integrate it with Shopify?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

107. Do you have or want forms for warranty or returns? Please describe in detail.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

108. Should the shipping tracking code/AWB be visible on the customer's account page, or will it only be sent via email?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

109. Do you want to modify the names of payment methods in the checkout process?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

110. Would you like different emails to be sent from different email addresses? If yes, please list the email flows with their corresponding addresses (e.g., order confirmation, shipping, invoice from example.ana@ex.com; return/warranty form from example.b2b@ex.com).

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

111. What levels of admin access and user permissions do you need for different members of your team?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

112. Are you planning to manage multiple storefronts, and if so, how important is having a single login for these stores?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

-
113. Will you be using Shopify's built-in POS system, or do you need integration with a specific third-party POS solution? If so, which one?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Customer Service

114. What specific order management capabilities are you looking for, such as editing orders, cancellations, or partial fulfillments?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

115. How would you like to segment your customers or members—by behavior, purchase history, or custom tags? Be specific.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

116. How important is it for customers to easily manage and view their order history from their account?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

117. How often do you process refunds or partial refunds?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

118. Do you need customer service reps (CSRs) to complete orders via live chat or assist through screenshare for complex orders?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Analytics

119. What specific product and merchandising metrics do you need to report on regularly?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

120. Are there any custom business-critical metrics you'd like included in your dashboard?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

121. How detailed do you need customer lifetime value (LTV) insights, and are there any particular customer segments you'd like to track?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

122. How often will you need sales and revenue reports, and do you require any custom filtering or breakdowns?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

123. What tax reporting formats or jurisdictions do you need support for, and how frequently will reports be generated?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Checkout and Payment Option

124. Would you like to implement payment methods such as bank transfer and cash on delivery (COD)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

125. What payment methods do you offer or would like to offer? Ex: COD, PayPal, Apple, Card.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

126. Are you aware that Shopify charges transaction fees if you use a third-party payment gateway instead of Shopify Payments? See [here](#) for a breakdown.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

127. Do you plan to integrate Shop by Shopify?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

128. Is guest checkout required for your store, or will all customers need to create an account?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

129. Do you need an third party app like SEON for fraud prevention?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

130. Do you require the ability for customers to ship items to multiple addresses in a single order?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

131. How will you handle recurring payments and subscription orders (e.g., box-of-the-month services)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

132. Do you need to manage shipping from multiple warehouses or locations in Shopify?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

133. Would you like customer service representatives to have the ability to modify orders before they are shipped?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Marketing and Promotions

134. What are the types of Marketing/Promotional campaigns you do?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

135. What types of promotions do you currently offer or would like to offer to your customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

136. How is your traffic split between desktop and mobile? What percentage of visitors come from desktop versus mobile devices?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

137. From where will customer notifications be sent? Shopify or another platform like Klaviyo, Mailchimp?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

138. Would you like to add a quick view button for products?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

139. What kinds of bonuses or incentives do you offer or plan to offer to customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

140. Do you limit promotions based on customer groups or audience segments?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Email Marketing

141. Do you plan to integrate a third-party email service provider like Klaviyo or Omnisend?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

SEO and SEM

142. What are your main SEO and SEM goals, and do you need support with keyword optimization, meta tags, or Google Ads setup?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

143. Will you require an ongoing SEO management plan, including audits, site speed optimization, structured data implementation, and performance tracking?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

144. Do you need help integrating tools like Google Analytics, Search Console, or product feeds for Google Shopping and SEM campaigns?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

145. Do you need support integrating social media platforms like Instagram or Facebook for product tagging and direct shopping?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Products and Categories Questions

146. How many product images will you typically use per product?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

147. Will video be used on product pages?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

148. Is dimensional weight used in your shipping strategy, and how should it be applied?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

149. Will you require custom product attributes beyond standard options like size and color?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

150. Do you need custom product pages or design layouts for different categories of products?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

151. Will you have private sale categories or collections for specific customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

152. How deep will your product catalog go—will you need multi-level category navigation?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Ecommerce Questions About Omnichannel

153. List all third-party marketplaces you are currently integrated with.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

154. How would we manage catalog publishing with specific pricing and product information per channel?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

155. Can users check out within Facebook or would they be redirected to our online store?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

156. Do you support publishing our product catalog to Amazon?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

157. Describe your integration to third-party channel management applications like Channel Advisor.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

158. Do you support the Instagram marketplace?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

159. Do you support Pinterest buy buttons?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Other Questions

160. Will your team need training and user documentation for managing the Shopify platform?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

161. Who from your team will be involved in the project, and what are their roles? Please add their contact details.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

162. Are there specific events or high-traffic periods where you'll need extended support from us?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

B2B Capabilities (if applicable)

163. Do you need dynamic pricing capabilities for your B2B customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

164. Will bulk ordering and custom price limits be essential features for your B2B operations?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

165. What specific B2B business models will your store need to support (e.g., wholesale, tiered pricing)?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

166. How do you plan to manage and display different price lists for your B2B customers?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

167. Do you want to run B2B and B2C from the same store, or would you prefer separate management tools or subdomains?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

168. Should we configure different catalogs and pricing for B2B and B2C users on the same site?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Potential Risks & Dependencies

169. Are there any external factors or dependencies (e.g., third-party vendors, supply chain, internal teams) **that could affect the timeline?**

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

170. What are the biggest risks you foresee in the project, and how would you like us to mitigate them?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Budget & Investment

171. What is your estimated budget for this project?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

172. What are you spending currently with third party apps/plugins?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

173. What are you spending currently with the current eCommerce platform?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

174. Are you open to post-launch support and maintenance if additional work is identified beyond the initial scope?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

175. What ongoing support or maintenance do you anticipate needing after launch?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

Communication

176. What other agencies are you currently working with? Will they have a role in our collaboration?

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

177. How do you prefer to communicate with our team (e.g., weekly meetings, email updates, project management tools)? We do not use Whatsapp.

Merchant Answer:

VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

178. How quickly can you commit to providing feedback on deliverables to ensure the **timeline stays on track**?

Merchant Answer:

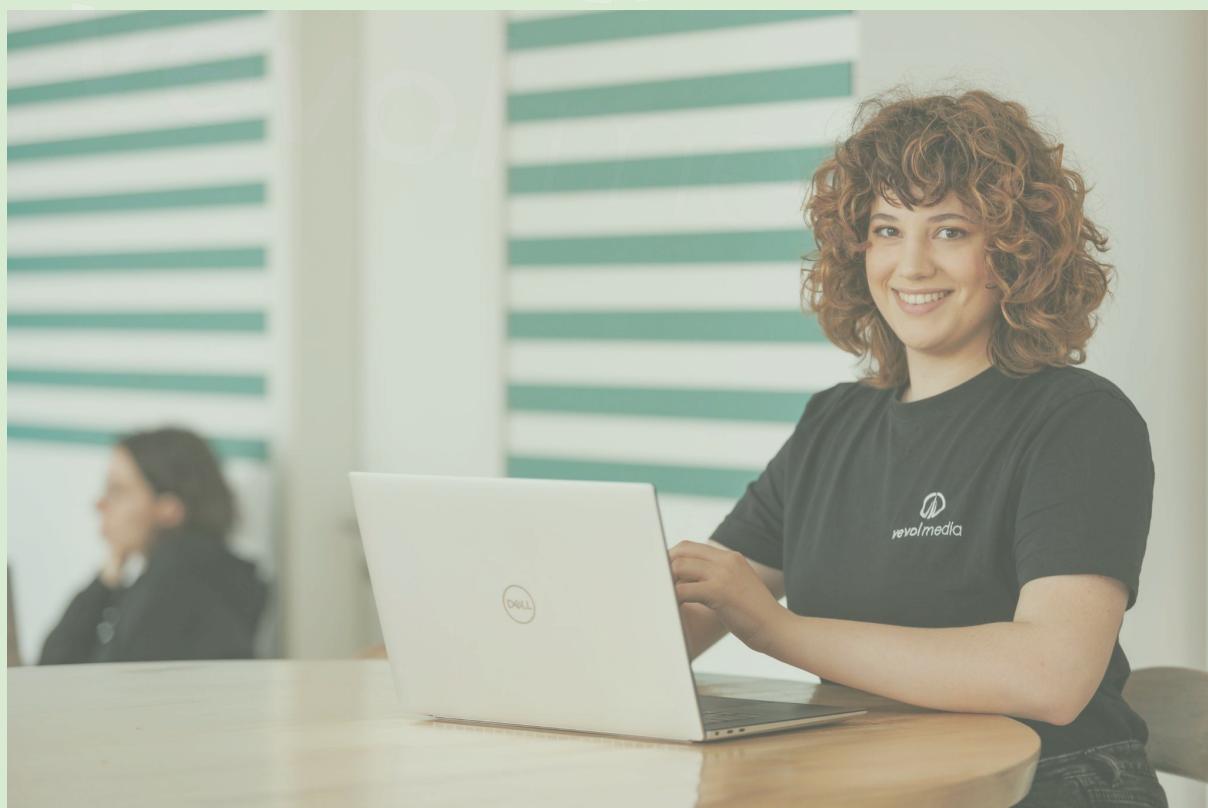
VM Configuration: Select Configuration ▾

VM Estimate (Days):

VM Notes:

The Final Word

Thank you for taking the time to complete this document. Your insights are invaluable in helping us craft the best possible solution for your business. We're excited to dive into the project and work closely with you to bring your vision to life. We look forward to a successful collaboration and can't wait to build something truly exceptional together. Thank you!



Now that was some work... Thank you so much for taking the time to fill this Handbook. Here's to a smooth and fruitful collaboration!

