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WELCOME!

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Let's get started...

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## HELLO AGAIN!

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In this little pdf you'll find all the info you need for your new website project to run smoothly. Take your time to read through it, as well as the other documents I've attached. I'm always available to chat on the phone or answer any questions by email to clarify anything further. I'm here to make your life easier!

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## WHAT'S INCLUDED

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### WELCOME PACKAGE

- PROCESS - step by step of what to expect during the design & build process.
- CHECKLIST - to make sure everything is ready to get started!
- DOMAIN INFORMATION - Explanation & my recommendations.
- SHOPIFY INFORMATION - Your store going forward.
- LINK TO OUR ONLINE WEBSITE QUESTIONNAIRE - All the important things I need to know to start your project. To be filled out with the planning guide in mind.

### DOCS ATTACHED

- WEBSITE PLANNING GUIDE - Your guide to the most important design elements to consider when planning your website.



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# PROCESS

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## STEP BY STEP

1. Once the proposal is accepted, we'll settled on a start date, the contract will be signed and the first invoice will be paid via Zoho Invoice.
2. I'll invite you connect to a shared folder on Dropbox via email. This way we can use one folder to share all project related documents, content and images.
3. You'll fill out the Website Questionnaire and upload your logo (in Illustrator or EPS format if possible), all new images & content to our shared Dropbox folder, ideally 1 week before your start date. This will ensure that I'm fully prepared, and will take the stress off of you because once you hand everything over to me, you can sit back and relax while I do the work!
4. After I've gone through your files we can either set up a planning call or I will send you any questions I may have by email.
5. Based on our planning call and the information you provided me, I'll get started designing 2 mockups of layout & design for your site and send it to you for approval. You can request revisions to this initial mockup up to 2 times to make sure we get it looking just right.
6. After the layout & basic design is approved, I'll send the second invoice and will get started turning the mockup into your actual Shopify store. If your moving over from an existing eCommerce store, all products, customers, and orders will be migrated to your Shopify store.
7. Once the design is in place, the content is added, and you have approved the final site, we'll both go through to check all links, optin forms and other functionality to make sure all is working perfectly.
8. When you are ready, I'll send you the final invoice, we'll go live and you can share it with the world!



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## PROCESS, CONTINUED

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### FINAL TOUCHES

- I will send you a final documents packet with everything you need to take over your website and strengthen your new brand. This includes a Shopify tutorial customized for your website, a brand style guide (with colors, fonts & graphics to use in your other marketing materials) and my favorite resources to help you with your new online presence.
- During the month after your launch, I'll continue to be available via email to answer any questions that may come up while you're getting familiar with your new site.

### PAYMENT

Unless we have a specialized payment plan worked out in advance, payment arrangements generally work like this:

- 50% of the total fee is due upon signing the contract and before the start date of your project.
- An additional 25% is due upon design approval before coding begins.
- The remaining 25% is due before the site goes live.
- I accept payment primarily via Zoho, with which you can use any major credit card, Paypal account, or bank e-check. I accept checks from local businesses only.



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# CHECKLIST

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## What to have ready before your start date

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Before or very near your start date, please help us get ready by sending me the following items:

- Fill out the Website questionnaire - listing 3 websites you like the style of.
- Fill out the Client Intake Form. Include login information for all your accounts. I'm happy to help you set these up if you need
- Locate a high resolution copy of your logo, and your branding guidelines (if you have them). If you need a logo I can recommend a wonderful local designer.
- Compile new content for all pages as well as extra text like buttons & opt-in text. Clearly label which content goes where within the document. \*
- Compile all photos/images (any graphics like logos, etc) you would like on your site. Make notes on the desired location of images for the website. \*
- Upload the above items to our Dropbox project folder.
- If we are migrating from an existing store, delete any old products that you don't want moved over prior to the migration.

\* It is best to start the design process with the majority of content already complete. This ensures that I can create the design around how much/little content you have. If however, you are uncertain about certain areas because you would like to see the design mockups first, that's ok - just let me know!

\* Migrations from an existing eCommerce store to Shopify will include all product images and content, so you only have to provide new content and images for your new Shopify store.



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## DOMAIN NAMES

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When your Shopify store is in development, it will have a development only domain name, such as "goodstuff.myshopify.com". When your site is ready to go live, we will change the name to a custom domain name. If you don't already own a domain name, you can buy one through Shopify, or any other domain name provider, such as namecheap.com, etc. The benefit of buying your domain name through Shopify is you can set up an unlimited number of forwarding email addresses for free.

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## EMAIL FORWARDING

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Shopify doesn't provide email hosting, but if you buy a domain through Shopify, you can set up an unlimited number of forwarding email addresses for free. All new email addresses must be forwarding to an existing email address (for example Gmail or Outlook).

We suggest the following options:

[Zoho mail](#) provides up to 10 free email accounts for your custom domain, with paid packages available.

[G Suite](#) connects to the Gmail platform with emails for your custom domain for a small fee per user per month.

Feel free to discuss these and other email provider options with me.



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# SHOPIFY INFORMATION

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## HOW THE SHOPIFY DESIGN PROCESS WORKS

I design Shopify stores as a development store first under my Partner account. Shopify development stores are free of charge for an unlimited duration. This allows us to take the time we need to make sure your store is built the way you want it and is ready to sell your products. (otherwise we would have to use the 14 day trial which might not be enough time)

While in development, your store will be password protected, to make sure it's not accidentally found by potential customers when it's not yet ready.

Once the design is considered finished, I will provide you with a Merchant Handoff Kit, and the store will be transferred to your account. At this time you will need to choose a live subscription plan through Shopify. Most of the plans fall within the \$29.00 a month range. There may be additional charges for paid apps (see below). When transferring to a live subscription plan, the store will require billing information, which must be provided by the store owner (you).

Once the store is in your name, I will still be able to login with full access to edit and further develop the store. I will not have access to the store's financial information, such as billing information and Shopify Payments payout details.

## PAID APPS AND ONGOING SHOPIFY COSTS

There's a good chance your store will need additional functionality that can only be provided by installing one of Shopify's Apps. App prices range from free to \$20 per month. I will always recommend the least expensive option for getting the functionality that your store requires. Paid apps are billed directly to your Shopify account. You can see examples of the Shopify apps here - [apps.shopify.com](https://apps.shopify.com)

\*\*If any of this apply to you we would have surely discussed it already or will in the planning call.



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## NEXT STEPS

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### WEBSITE PLANNING GUIDE

Our Website Planning Guide will be sent as an attachment to this document, but just in case you need to find it again you can download another copy here -

[Client Resources](#)

### WEBSITE QUESTIONNAIRE

The link below will lead you to our Website Questionnaire. It asks important questions related to your current site, necessary logins, and your new website's functionality and design.

[Website Questionnaire](#)