Clarity eCommerce Checklist

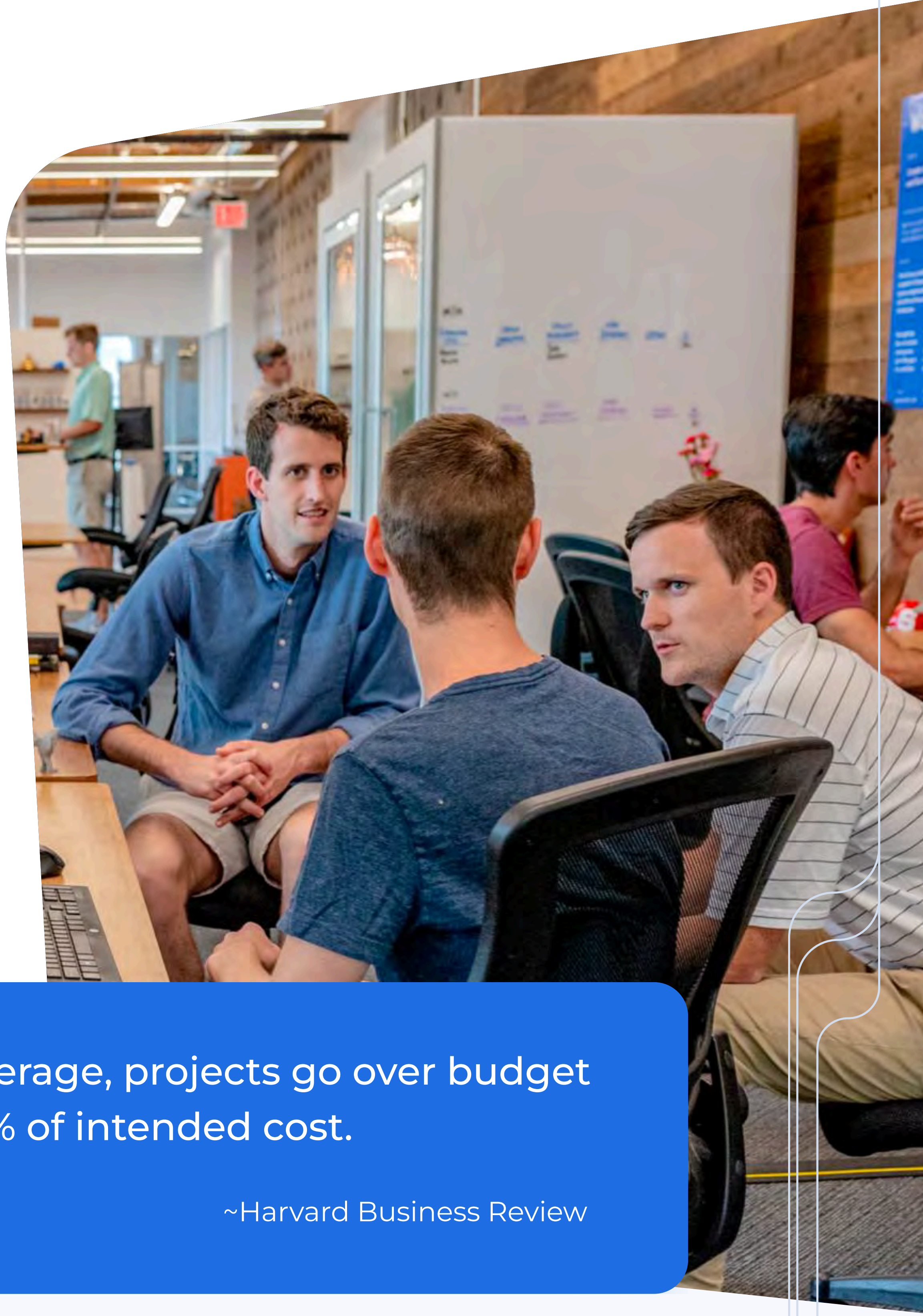
CLARITY

Clarity eCommerce™
Clarity eCommerce Platform

Getting Prepared

If you are planning to launch an eCommerce business or add eCommerce to your business offerings, you may be overwhelmed wondering what needs to be accomplished ahead of development and taking a site live. Clarity has put our experience and expertise into this helpful checklist that will guide you to a smooth launch.

From over 1,300 successfully launched projects, we've learned that the more prepared you are for a project, the less surprises, over-runs, change orders and delays there are. You can never be too prepared.



On average, projects go over budget by 27% of intended cost.

~Harvard Business Review

The Full Checklist

- Decide how you will calculate sales tax and supply your developer with any relevant account information
- Set up carrier accounts and share with dev team
- Define your current / future shipping processes
- For international shipping, find customs, VAT, duties
- Prepare product dimensional weight information
- Register and configure merchant account(s)
- Choose the PCI DDS level of validation that is right for you and begin the certification process
- Follow the PCI Compliance guide to get certified
- Set up an automated certification audit
- Gather, optimize and organize images, product descriptions, marketing materials, etc.
- Plan and execute your content audit based on an updated target audience list
- Optimize existing metatags and metadata with adherence to the latest SEO best practices
- Plan SEO metadata for new pages & products (title, URL, Description, keywords, H1, H2's)
- Create a spreadsheet with all of the pages that will be redirected and the pages they will redirect to
- Decide what account information to transfer and transfer method with your development partner
- Define customer specific, default and partner pricing
- Define account credit rules
- Define inventory management rules

Collect or Not to Collect

There are different classes of sales tax that will need to be applied that can change based on county, zip code, or state
depending on the locality and regulations for online business sales.

There can be major penalties for errors in collecting sales tax that can really hurt your business, so it is crucial to plan ahead for
how you will ensure you are applying, collecting and reporting correctly.

Sales Tax To-do:

- [ ] Decide how you will calculate sales tax and supply your developer with any relevant account information

Price Table

Use tax tables that are built in to the eCommerce system, keeping in mind that these will need to be updated periodically.

3RD Party API

Use a third party tax service like Avalara Sales Tax. It's extremely accurate, and Avalara can also file your state tax reports for you.

ERP Calculation

Use the built in tax calculator in your ERP system. Many ERP systems have the ability to generate sales tax for your orders.

Collect or Not to Collect

8.25%

eCommerce Calculation

8.24%

3rd Party API Integration

8.25%

ERP/CRM/ACCT Integrations

Shipping

Tracking, International & Contracts

Most eCommerce businesses will want to use standard shipping options like UPS, USPS, FedEx, and/or DHL. Make sure you have accounts set up with any carriers you plan to use and are ready to provide account login information to your development partner.

Also, extra development consideration if you have negotiated shipping rate contracts with multiple carriers. Ensure your developer and the platform can handle them.

Make plans for how your shipping process will be configured ahead of time. You will need to know if you require packing slips, tracking numbers, if the customer will need to be automatically provided with tracking information, etc.

Decide if you want your eCommerce platform to pull tracking information directly from the shipping carrier, or if you will update the account manually in your ERP and have eCommerce pull from there.

Tracking, International & Contracts

If you ship internationally, will you automate customs and duties through your eCommerce platform? Some platforms have the capability to produce the proper labels, customs forms and tracking automatically.

Keep in mind that some products cannot be shipped based on their classification. Be sure you know all relevant shipping laws and where they apply before attempting to sell and ship your products.

Be prepared to provide product dimensional weights (L x W x H and Weight) unless you are not charging for shipping or are charging flat rates. Dimensional weights are needed to calculate shipping costs, especially for international shipping.

Shipping To-dos:

- [ ] Set up carrier accounts, contracts and share with development team
- [ ] Define your shipping process, both existing and desired
- [ ] For international shipping, determine customs, VAT and duties
- [ ] Prepare dimensional weight information

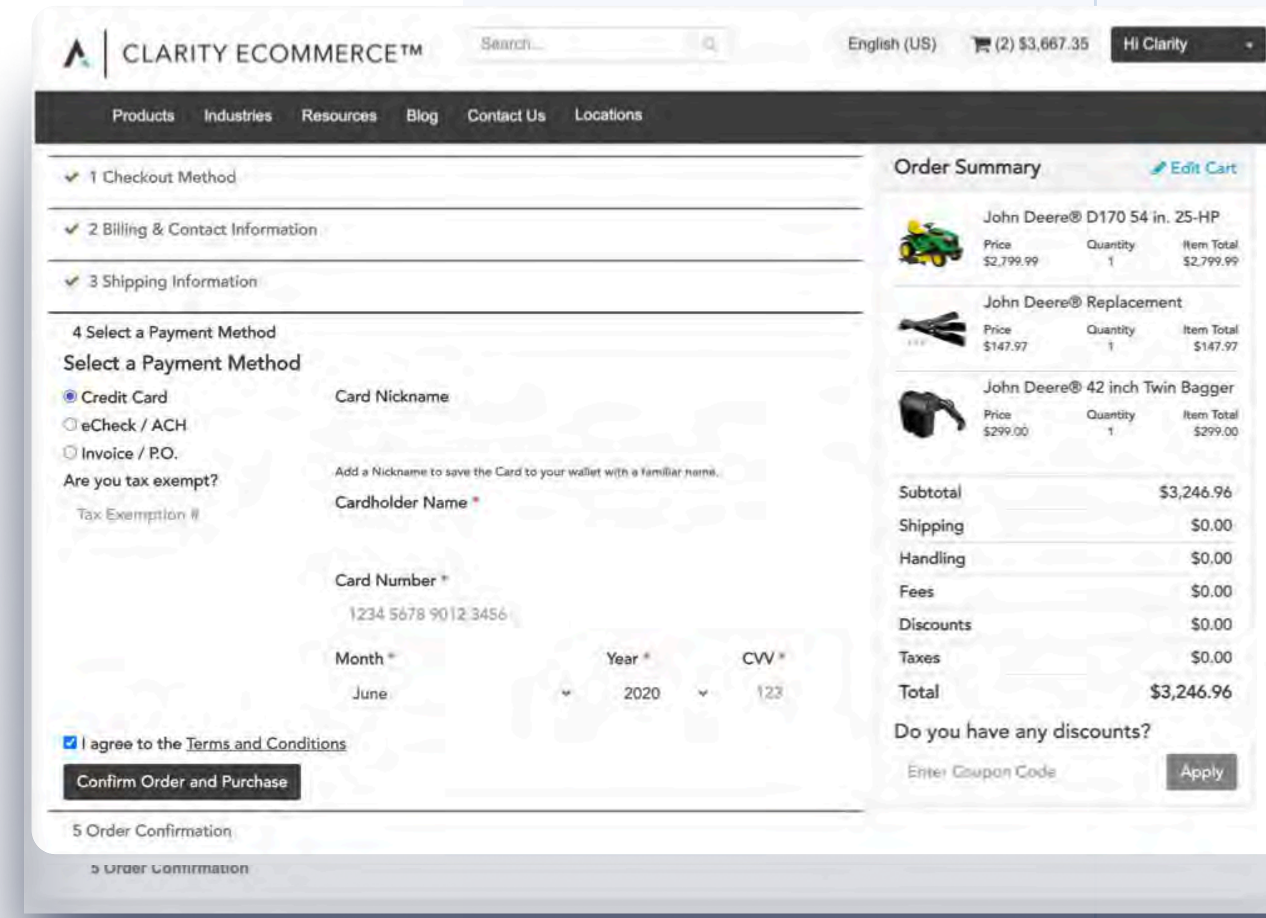
Merchant Account Needs

Many options for payment processing including:

Standard credit cards, eCheck, PO, PayPal, Apple Pay, Google Checkout and many more.

If you don’t have a merchant account for credit card processing, note that it can take weeks to get approved. Begin this process early! The merchant takes on the risk of processing fraudulent charges, so the evaluation process can be lengthy. Talk to your developer. Clarity is a certified partner for many payment processors and helps its clients get signed up quickly and easily.

Some solutions, like Clarity eCommerce (image on the right), will allow your customers to store their credit cards in a PCI DSS compliant wallet for later use during checkout.



Merchant Account Needs

Best Practices

- If you accept any cards of a particular brand you must accept all cards from that brand equally
- You cannot establish a minimum or a maximum for card purchases
- You cannot impose a surcharge or fee for card payments separate from cash or check but you can give a discount for paying in cash or check
- You cannot establish special conditions for accepting cards
- You can impose a convenience fee for certain payment channels
- You cannot ask for personal information unless instructed by the Authorization Center

Payment Processing To-do:

- [ ] Register / configure your merchant account(s)

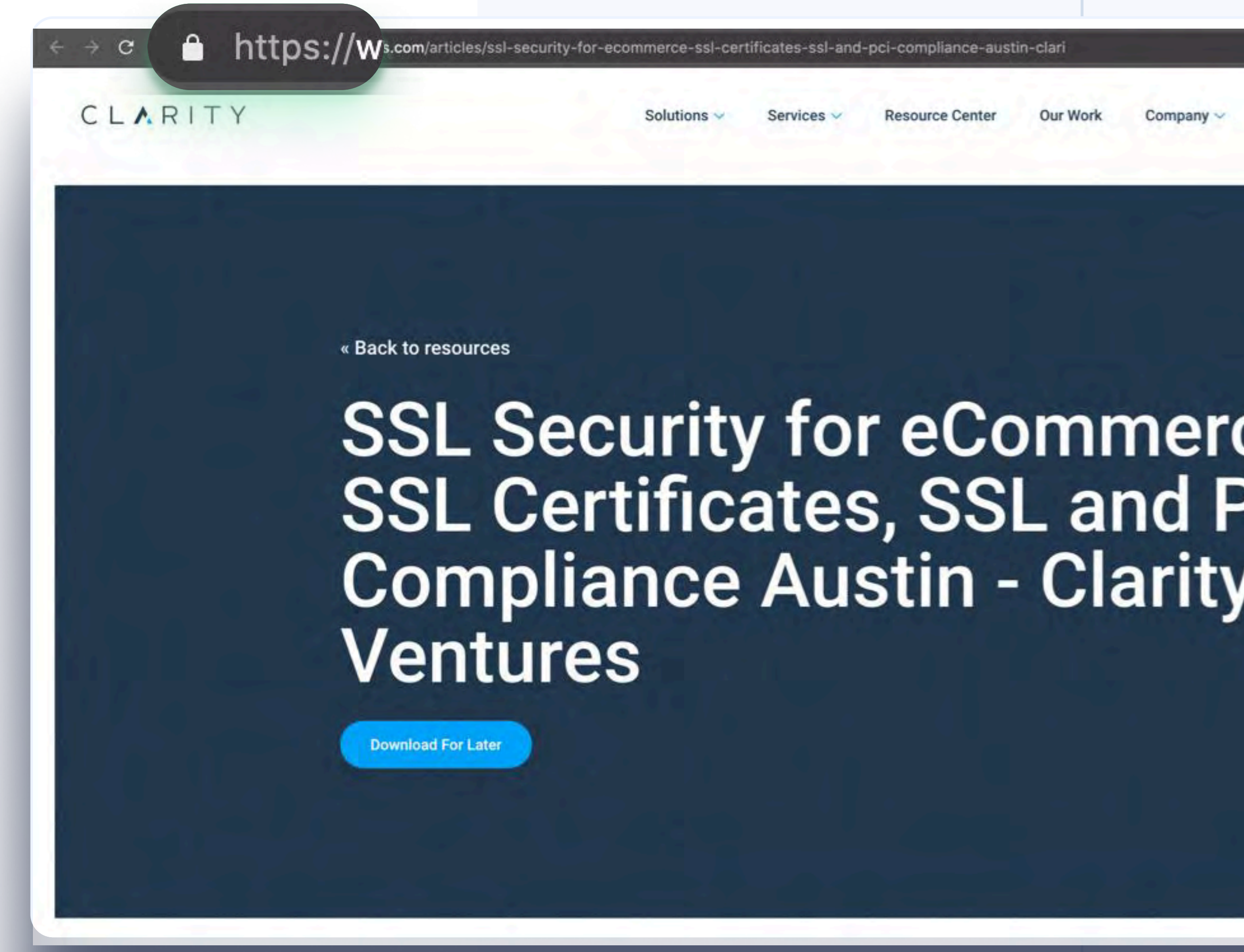
Which One to Choose?

SSL Certification allows the customer's browser to securely connect to the web server. This is a crucial certification for eCommerce sellers, and there are a few different levels you can get certified for.

Is There a Difference?

Yes, there are a few. Mostly it comes down to depth of validation and the level of trust you want visitors to feel. You also need that little "lock" icon, and the HTTPS in the URL (image on the right).

There are three types of certificates that offer differing levels of user trust for SSL/TLS negotiations: Domain Validated certificates (DV), Organization Validated certificate (OV) and Extended Validation certificates (EV).



Types of Certificates

1. Domain Validation SSL

Domain Validated certificates are certificates that are checked against a domain registry. There is no identifying organizational information for these certificates and thus should never be used for commercial purposes. It is the cheapest type of certificate to get, and the minimum you need, but this is a high risk certificate to use on a public website.

2. Extended Validation SSL

Nothing provides more trust and security than Symantec Extended Validation Certificates. It is used by most of the world's leading organizations. They have found that switching from OV to EV certificates increased online transactions and improved customer confidence. It is no longer a luxury but a necessity if you're serious about online security.

3. Organization Validation SSL

Organizational certificates are trusted. Organizations are strictly authenticated by real agents against business registry databases hosted by governments. Documents may be exchanged and personnel may be contacted during validation to prove the right of use. OV certificates therefore contain legitimate business information. This is the standard type of certificate required on a commercial or public facing website.

SSL Certificate To-do:

- [ ] Choose the validation that is right for you and begin the certification process

You Don’t Store Credit Card Numbers

The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that companies that process, store, or transmit credit card information maintain a secure environment.

Lvl 1 Merchants

Level 1 merchants process over 6 million card transactions annually through all channels (card present, card not present, eCommerce).

Lvl 2 Merchants

Level 2 merchants process 1 to 6 million card transactions annually through all channels (card present, card not present, eCommerce).

Lvl 3 Merchants

Level 3 merchants process 20,000 to 1 million card transactions annual exclusively via eCommerce processing methods.

Lvl 4 Merchants

Level 4 merchants process up to 1 million card transactions annually through all channels (card present, card not present, eCommerce) and do not process more than 20,000 card transactions annually exclusively via eCommerce.

You Don’t Store Credit Card Numbers

- Install and maintain a firewall configuration to protect cardholder data
- Do not use vendor-supplied defaults for passwords and other security parameters
- Protect stored cardholder data (use PCI tokenization)
- Encrypt transmission of cardholder data across open, public networks
- Use and regularly update anti-virus software or programs
- Develop and maintain secure systems and applications
- Restrict access to cardholder data by business need to know
- Assign a unique ID to each person with computer access
- Restrict physical access to cardholder data
- Track and monitor all access to network resources and cardholder data
- Regularly test security systems and processes
- Maintain a policy that addresses information security for all personnel

PCI DSS Certification To-dos:

- [ ] Choose the validation that is right for you and begin the certification process
- [ ] Set up an automated certification audit tool

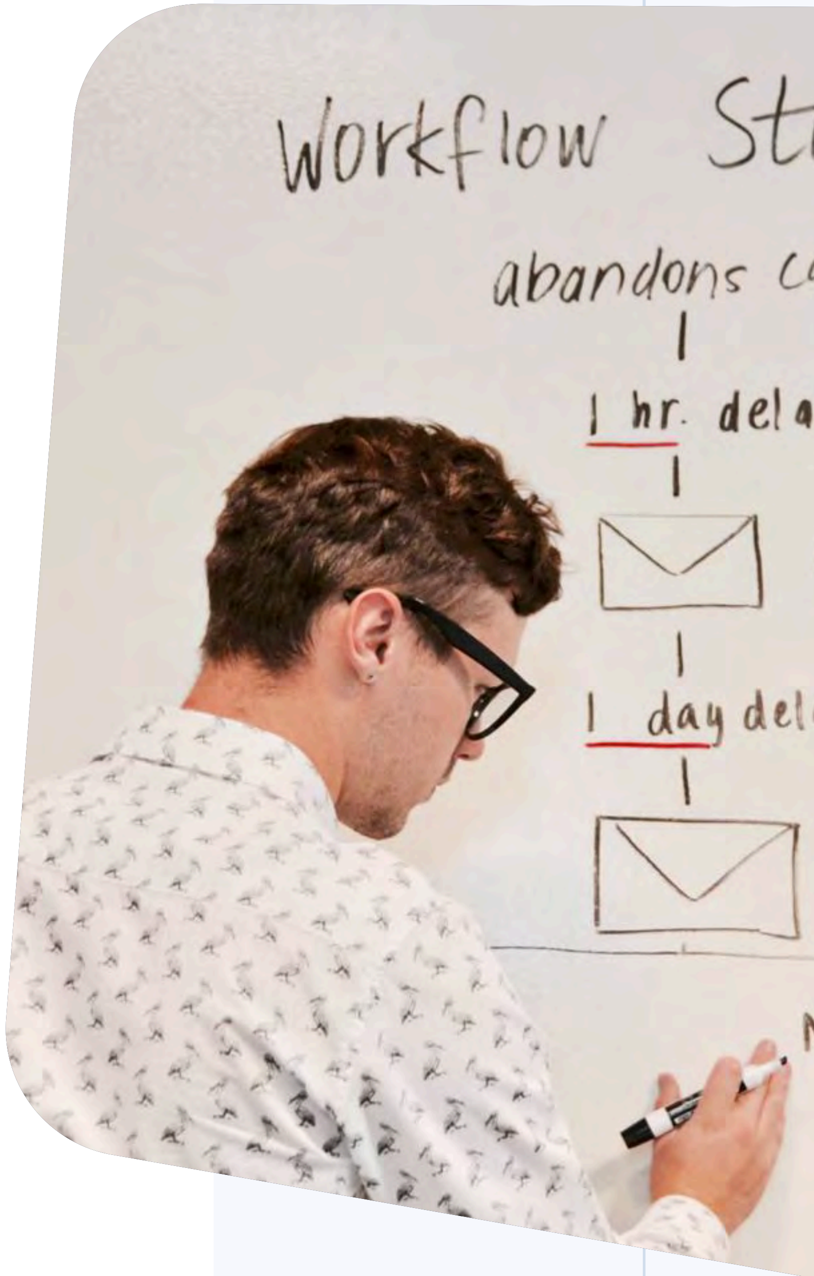
Custom Content Strategies

Even if you are having a development company build your site, you will still need to provide much of the content. An SEO content strategy could take months to research and perfect, and I'm assuming that I've got about 3 minutes of your time, so I'll be brief. When writing for SEO, our target audience is mostly Google. Google is the most restrictive (except for keyword stuffing penalties that Bing does), so if we optimize our content within the Google guidelines, we'll do well across all the search crawlers.

One caveat is that if you focus heavily on business management as your audience, Bing has a higher percentage of executives using it, so your display ads, PPC, etc. may be better focused on Bing, rather than Google.

What’s the Difference?

Well, it doesn't rank an entire site. It may rank a single article or blog post really well for a single keyword. So before you start writing or re-writing any content, get your master competitive keyword list researched and approved.



Content Strategy 3-30-3 Rule for CRO

3 Seconds

You've got roughly 3 seconds after a visitor hits your product page to let them know that they're in the right place for what they're looking for. This means that your H1 (Product Name), Tagline and H2 just became the most important elements on the page.

30 Seconds

If they feel like they're in the right place, they'll give you up to 30 seconds to "pitch" them. That means that your opening H2 and first 2 sentences (product short description) better be good. Hit them with an interesting statistic, industry quote or differentiating factor.

3 Minutes

If they like the pitch, they'll give you up to 3 minutes to learn more. Want to know why 90- second videos have such a high conversion rate? The 3-30-3 rule. So for your 3 minutes, what demo, story, customer review, additional spec content or info graphic has the best chance of conversion?

CTA, CTA, CTA

You've done great at SEO and got them to the page. You did great with CRO and got them through the 3-30-3 mark, now CLOSE them. Let them know exactly what you want them to do. If you don't ask, they won't convert.

Content Strategy To-dos:

- [ ] Gather and organize images, product descriptions, marketing materials, etc.
- [ ] Plan and execute your content audit based on updated target audience list
- [ ] Optimize existing metadata with adherence to the latest SEO best practices
- [ ] Plan metadata for new pages

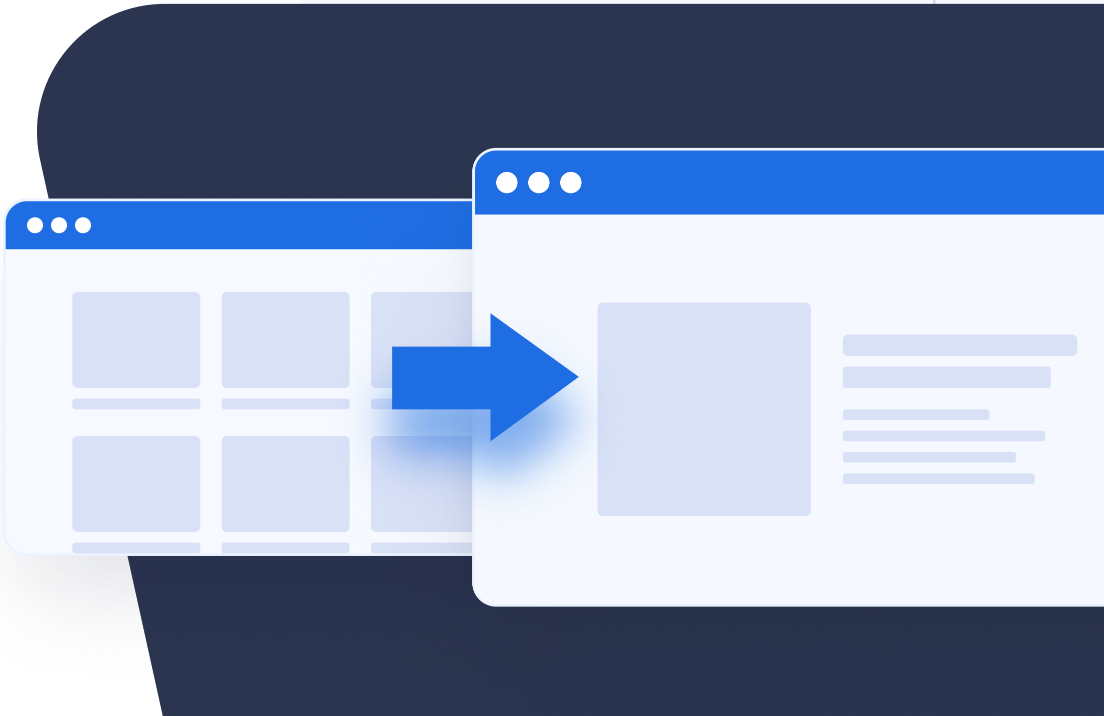
Both an SEO & CRO Tool

Over the years, as people became more familiar with the benefits and need for organic SEO, they've started to roll out new mobile responsive, highly optimized websites. One of the main things that is updated on a website refresh is the re-working of the page URLs to make them more SEO friendly (i.e. it helps to improve a page's rank with Google). Now, you could go into webmaster tools and flush your old site's indexed pages (to remove 404's when people try to hit the old pages), and force Google to crawl and index your new site, however, any SEO ranking authority that you've built up over time would all be flushed away.

301 redirects allow websites to tell the search bots that we've permanently moved a web page to a new URL, and if we use a 301 (permanent) re-direct, Google will transfer 90-99% of the link equity earned to the new page. As the the new page is re-crawled, the authority may change for the better, especially if we not only created a better URL, but improved the other on-page ranking factors (H1, H2's, meta description, meta title, keyword variations, mobile responsiveness, image factors, etc.).

Types of Redirects

- 301: Moved permanently. Best for SEO
- 302: Found, moved temporarily for HTTP 1.0 (Don't index)
- 307: Same as 302 but for HTTP 1.1 only



Both an SEO & CRO Tool

Either way, Clarity gives you three different ways to manage your product pricing out of the box, and can integrate or swap out the pricing provider if you have your own proprietary way or use a 3rd-party solution to calculate pricing. Give Clarity a call and request a demo to see how it can help with your eCommerce solution.

Rule Example:

```
<rule name="Blog203">
 <match url="^blog/article/982/dnn-portals-
intranets-made-easy$" />
 <action type="Redirect" url="/blog/dnn- portals-
intranets-made-easy"
 redirectType="Permanent" />
</rule>
```

You can see in the example on the left, that the old URL had position 2 of "/blog" but then added a position 3 (/article) and position 4 (982), before it finally listed the SEO friendly content in position 5. When we released our new site, we re-did all of the URLs to put the article names in position 3, a much stronger position for SEO, and removed the extraneous parts of the URL, that were actually hurting our rankings.

This is an example of a single redirect, but you can have more global redirects that would redirect a whole section (/products 42654/faucets/moen/*) to a more highly ranked and readable section (/faucets/moen/*) or even just (/moen/*).

301 Redirect To-do:

- [ ] Create a spreadsheet listing all of the pages that will be redirected and the corresponding pages they will be redirected to

What About Existing Accounts?

If you have an existing eCommerce platform, there will be users accounts already setup that you will want to import to the new system.

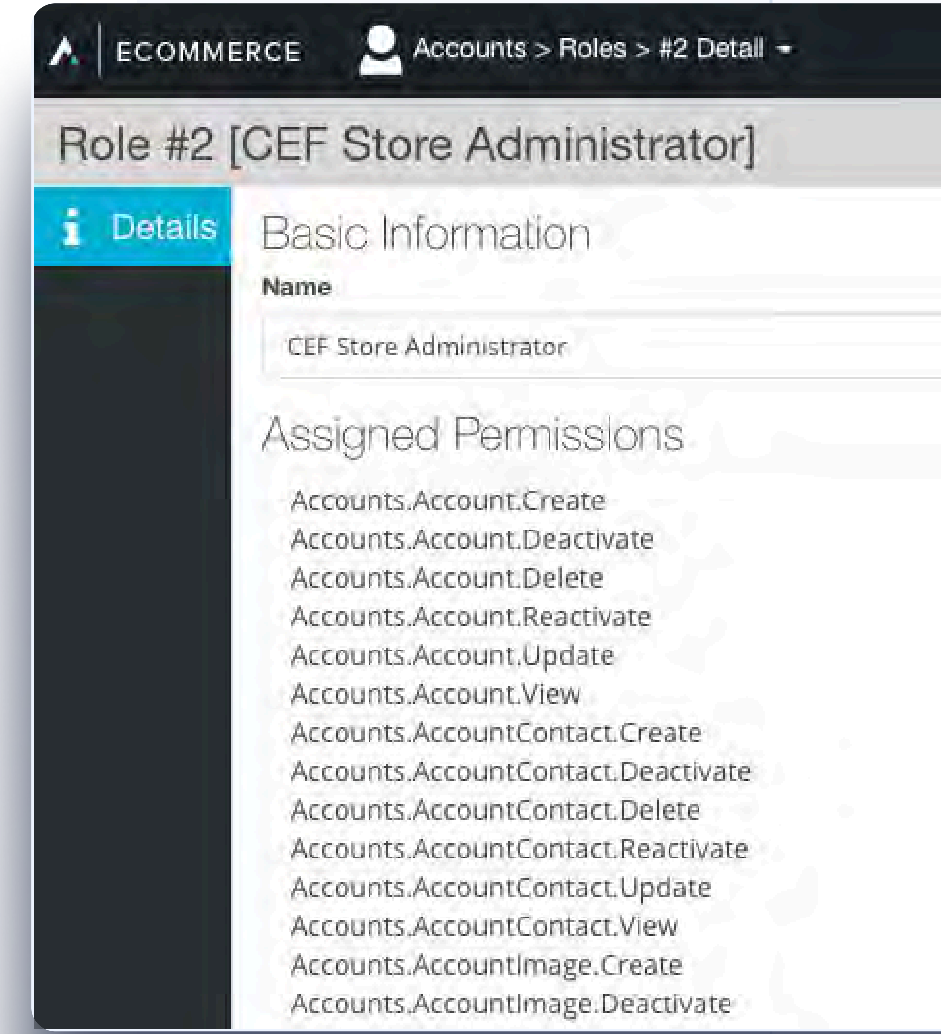
Make plans with your development partner for obtaining the necessary information and bringing it over to the new implementation.

Be sure to set up all related accounts for shipping, accounting, payment processing, etc. ahead of launch and provide access to your eCommerce development partner

What About Existing Accounts?

You can plan to send an automated email to existing accounts so that your customers are notified of the coming change along with any information you want to include regarding benefits of the new site, the need to register a new password, etc.

If existing user accounts contain order history, address information, customer profiles, etc. that need to be brought over into the new system and the data isn't going to sync from an ERP, CRM or other line of business application, plan with your development partner to pull the information from the existing platform.



User Account To-do:

- [ ] Decide what account information / role(s) needs to transfer and plan transfer method with your development partner

Automating Business Processes

Business logic helps define and set the parameters for how your online business will work. Lay these plans out ahead of time so that you can be sure the platform you choose can accommodate your needs.

Mapping out these types of business rules ahead of time will help ensure your project doesn't hit any snags. If you are working with a development company, be sure to present these up front.

Customer Specific Pricing

If your pricing varies for items for any reason, you need to have the logic planned out ahead of time. Default pricing is set which will apply to all users who do not have specific pricing set. Volume discounts may still be applied to these accounts. Customer specific or partner pricing may be entered manually, pulled from your ERP, or determined by specific factors built in to an algorithm.

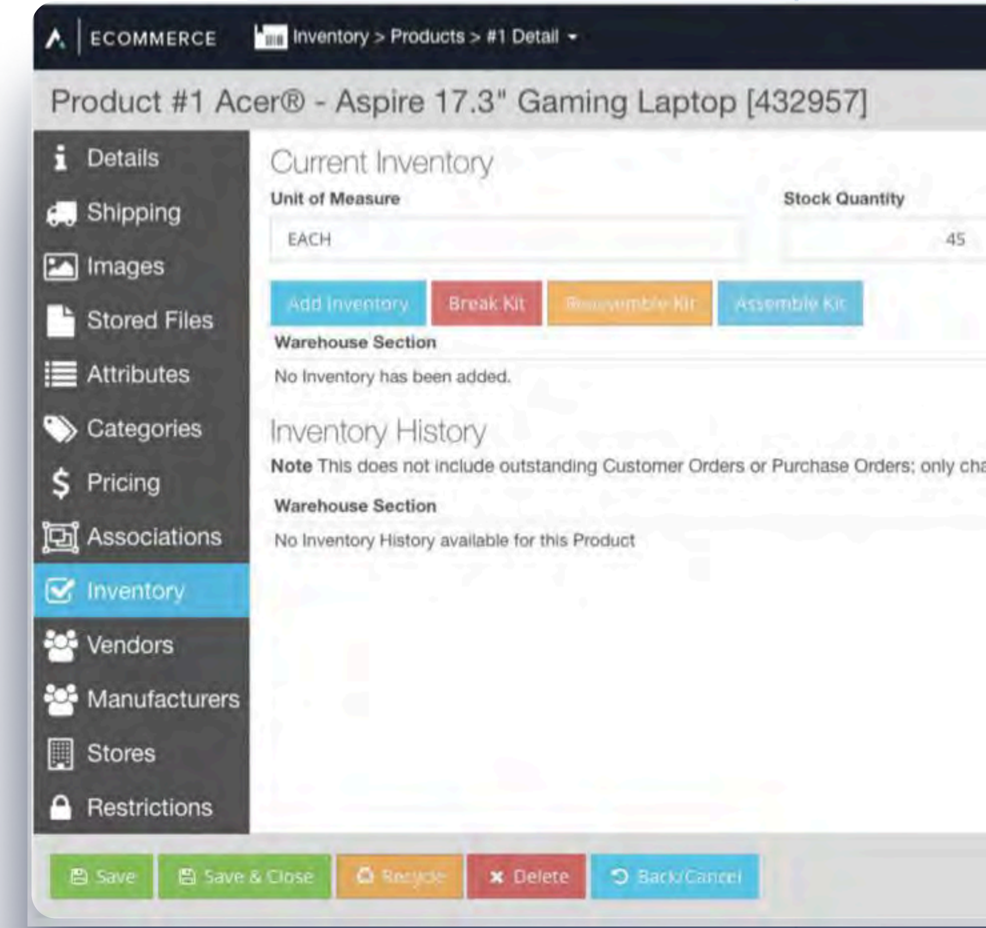
Automating Business Processes

Account Credit Rules

Do new accounts need to complete a credit check before making their first purchase? Do certain accounts have limitations on what they can buy based on their credit? Do you want items of a certain cost to require payment?

Inventory Management Rules

Some products cannot be sold beyond inventory, while others can be backordered. Make sure the platform allows you to track inventory or not, in the case of digital products, allow back orders, manage real-time inventory stock, multi-warehouse inventory, drop-shipping through vendors and more. Clarity eCommerce (shown) allows for this and much more.



Business Logic & Rules To-dos:

- [ ] Define customer specific, default and partner pricing
- [ ] Define account credit rules
- [ ] Define inventory management rules