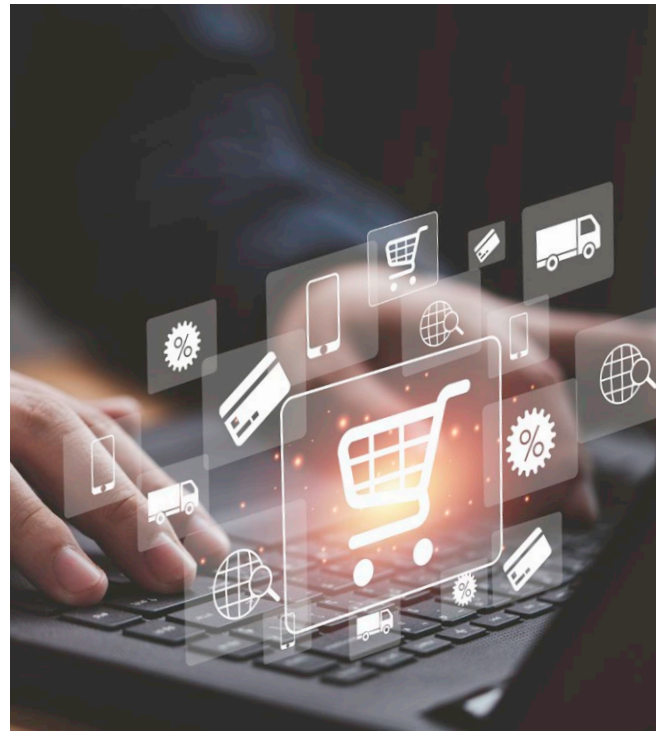


B2B eCommerce SUCCESS IS IN THE DETAILS.

A checklist for creating your B2B
WordPress eCommerce website.



Our Custom Direct, Inc. team follows best practices for building powerful, iterative websites using WordPress Architecture. WordPress is best known as an open-source content management system (CMS) with a high degree of flexibility for building and maintaining your website.

In fact, more than 74% of the websites in the world use the WordPress Architecture, and for good reason:

- **Mobile Friendly** – sell your products on desktop, phone, or tablet
- **Search Engine and SEO Friendly** – your site, and your products, get found
- **Open Source** – means you're never locked into a single supplier or format
- **Infinitely Scalable** – to grow as you grow, without compromising performance
- **Powerful eCommerce** – is yours, using the WooCommerce platform, on par with the likes of Shopify, Magento and others, but with the flexibility and power of WordPress

This checklist is designed to help you gather important details for a B2B eCommerce site built using WordPress Architecture. Unless otherwise specified, we assume:

- Selling and shipping to only the Continental United States (international orders can be accommodated with additional configuration).
- Weight unit: pounds
- Dimensions unit: inches
- Prices will be entered exclusive of tax and displayed in the shop/cart/checkout excluding tax
- Taxes will be calculated based on customer shipping address
- Taxes will automate from WooCommerce Tax
- Customers will be able to login to an existing account during checkout
- Customers will be able to create an account during checkout
- New accounts will automatically generate a username from customer email

YOUR eCOMMERCE CONFIGURATION CHECKLIST



STEP 1: Shop Details

Shop Configuration Details Required for eCommerce Development:

- Shop Address:** Your physical 'shop' or company address, primary contact email and phone number.
- Customer Accounts:** Will you allow customers to place orders without an account? Y/N
- Shop Notifications:** Choose a shop email to receive new, canceled, and failed order notifications, such as orders@yourcompany.com
- Customer Notifications:** Select any customer notifications you DO NOT want enabled: order on-hold, processing, completed, refunded, custom invoice, customer note, reset password, new account
- Shop Email:** Select an email address for email notifications to your customers.
- Product Stock:** Enable stock management, meaning will you enter the number of in-stock items.
 - If yes, enable low stock and out of stock notifications and to what email?
 - Do you allow backorders? Y/N
- Reviews:** Do you want to enable customer reviews? Y/N
 - If yes, only by verified owners?
 - Enable star ratings (required or optional)? Y/N
- T&C:** Do you have a Terms and Conditions or Terms of Use page? Y/N
 - If NO, we will assist you in developing this document. (See Appendix)
- Privacy:** Do you have a Privacy Policy page? Y/N
 - If NO, we will assist you in developing this document. (See Appendix)



STEP 2: Product Details

Specific Product Information Required for eCommerce Development:

- SKU
- Product name
- Product image*
- Description
- Price
- Product category, if applicable (See Appendix)
- Weight (for shipping)
- Dimensions (for shipping: L x D x H)
- Stock amount, if applicable

*High resolution images, 300x300dpi are best.
We will resize and optimize the images for maximum load speed.



STEP 3: Accepting Payments

We recommend any one of the three following payment acceptance systems. Select the system based upon your specific needs and budgets.

Payment Options:

PayPal

Free download includes PayPal, Pay Later, credit and debit card processing, and local payment methods.

Required: a pre-configured Business Account and supplied credentials to connect the account to your online shop.

Fee Details: PayPal Checkout 3.49% + \$0.49 USD

stripe

Free download includes Stripe, all major debit and credit cards processing, Apple Pay, Google Pay, and other local payment methods, such as Alipay, iDeal or SEPA Direct Debit.

Required a pre-configured Stripe Account and supplied credentials to connect the account to your online shop. (We will need to login to the account to connect Webhook Endpoints.)

WooCommerce

(Using Stripe Express account, fully integrated into WooCommerce)

Free download includes all major debit and credit cards processing, Apple Pay, Google Pay, and other local payment methods, such as Alipay, iDeal or SEPA Direct Debit.

Fee Details:

- **Credit or debit card:**
 - **2.9% + \$0.30 USD per transaction for U.S. issued card**
 - +1% for transactions paid using a card issued outside the US
 - +1% for conversion of currencies other than USD
 - **\$15 USD fee per dispute (refunded if you win the dispute)**



STEP 4: Shipping Your Product Via FedEx

FedEx® Shipping Method:

(can use built in FedEx freight for heavier items)

\$79 annually for the WordPress plugin.

Required: a pre-configured FedEx Account and supplied credentials to connect the account

We will need a developer key, production key, account number, meter number, web services key, web services password and production key.

FedEx LTL Freight is an option within this plugin for heavier weight options.

Note: You get shipping labels and tracking numbers directly from FedEx.

Options:

DOMESTIC	INTERNATIONAL
• First Overnight	• International Economy
• Priority Overnight	• International First
• Standard Overnight	• International Priority
• FedEx 2 day am	• Europe First International Priority
• FedEx 2 day	• FedEx 1 day freight
• FedEx Express Saver or FedEx Economy	• FedEx 2 day freight
• Ground Home Delivery	• FedEx 3 day freight
• FedEx Ground	• International Economy Freight
• FedEx Tube	• International Priority Freight
• FedEx First Freight	• Fedex Freight
• FedEx Freight Economy	• Fedex National Freight
• FedEx Freight Priority	• International Ground
• FedEx One Rate	
• Smart Post (if enabled on account)	



STEP 4: Shipping Your Product Via UPS



Shipping Method: (weight limit of 150 lbs)

\$79 annually for the WordPress plugin.

Required: a pre-configured UPS Account and supplied credentials to connect the account.

We will need a user ID, password, access key, account number, and customer classification.

Note: You get shipping labels and tracking numbers directly from UPS.

Options:

• Next Day Air Early
• Next Day Air
• Next Day Air Saver
• 2nd Day Air AM
• 2nd Day Air
• 3 Day Select
• Ground
• Standard
• Simple Rate
• Worldwide Express
• Worldwide Express Plus
• Worldwide Expedited
• Saver



STEP 4: Shipping Your Product Via USPS

UNITED STATES POSTAL SERVICE Shipping Method:

\$79 annually for the WordPress plugin.

Required: a pre-configured USPS Account and a USPS User ID. You can obtain a user ID by registering for a Webtools account on USPS.com.

Options:

DOMESTIC	INTERNATIONAL	FLAT RATE
• First-Class Mail® Postcards	• Priority Mail Express International™	• Priority Mail Flat Rate™ – Envelopes (Legal, Letter, Gift Card, Padded, Small, Window) and Boxes (Small, Medium 1 and 2, Large, APO/DPO/FPO Large, Large Board Game, Prepaid Forever® Packaging)
• First-Class Mail® Stamped Letter	• Priority Mail International®	
• First-Class Package Service – Retail™	• Global Express Guaranteed® (GXG)	
• First-Class™ Postcard Stamped	• Global Express Guaranteed® Document	• Priority Mail Express Flat Rate™ – Envelopes (Envelope, Legal, Padded) and Boxes (Top-Loading, Side-Loading)
• First-Class™ Large Postcards	• Global Express Guaranteed® Non-Document Rectangular	
• First-Class™ Keys and IDs	• Global Express Guaranteed® Non-Document Non-Rectangular	• Priority Mail International Flat Rate® – Envelopes (Legal, Letter, Gift Card, Padded, Small, Window) and Boxes (Small, Medium 1 and 2, Large, APO/DPO/FPO Large, Large Board Game)
• First-Class™ Package Service	• USPS GXG™ Envelope	
• First-Class Mail® Metered Letter	• First-Class Package International Service®	
• First-Class™ Package Service Hold For Pickup	• First Class Mail® International Letters	
• Priority Mail Express™ Hold for Pickup	• First Class Mail® International Large Envelope	
• Priority Mail Express™	• International Postcards	
• Priority Mail Express™ Sunday/Holiday		
• Retail Ground™		
• Media Mail®		
• Library Mail		
• Priority Mail®		
• Priority Mail® Keys and IDs		
• Priority Mail® Hold For Pickup		
• Priority Mail® Regional Rate Box A (when commercial rates are used)		
• Priority Mail® Regional Rate Box B (when commercial rates are used)		
• Parcel Select Ground (when commercial rates are used)		

APPENDIX

TERMS OF USE AND PRIVACY POLICY PAGES

These are important, and in most cases, required by law. Fortunately, there are many affordable resources available. We can assist your team in creating these documents, using apps such as Termly.io.

PRODUCT TAXONOMY

Product Taxonomy, in the simplest of terms, refers to organizing your products and services based on two main elements: Categories and Attributes. This organization helps users when they search for, and find, your product or solution.

Common products are grouped into Categories, while Attributes are applied to products within each category.

For example:

Categories for Power Transmission may include:

- Starting (Clutch)
- Stopping (Brake)
- Combined (Clutch/Brakes)

Attributes of a Brake may include:

- Torque Rating
- Input Power
- Max. Speed
- Mounting Type – Shaft, Flange, or Foot

How you organize and specify your product details for your B2B eCommerce site is key to providing a good customer experience: offering products that match your customers' needs and making it easy to find, compare, and ultimately purchase.

B2B customers come to your site because you are an expert. You have products and services which can meet their needs – and your B2B eCommerce site is organized in ways that help each potential customer better define their needs and review your available solutions.

We can assist you in exploring methods of organizing and presenting your products for the most user-friendly and efficient presentation.