



E-COMMERCE WEBSITE INFO CHECKLIST

IMPORTANT: Download this document to your computer before entering information. You will not be able to save the form if you edit it within a web browser or email program.

Congratulations! You've decided to expand your sales channels by opening an online store powered by Shopify™.

As part of the onboarding process, we require information about your business so that we can properly and efficiently configure the site to display your products, accept orders, take payments, and fulfill orders. You can type your information directly into this form and save it. Fields outlined in **red** are required. **Email the completed PDF form to your LP Sales Representative or to info@leechprint.com.**

PRIMARY CONTACT INFO

The person specified here is the primary contact for this store. This information will not appear anywhere on your store.

Contact Name	
Contact Email	
Contact Phone	
Contact Cell	

GENERAL INFO: STORE DETAILS

Shopify and your customers will use this information to contact you.

Store Name	<i>This name will appear in the title bar of the web browser when a customer visits your store.</i>
Store Contact Email	<i>Shopify will use this address if they need to contact you about your store.</i>
Sender Email	<i>Your customers will see this address if you email them. It will be used on all customer notifications.</i>

GENERAL INFO: STORE ADDRESS (PRIMARY STORE LOCATION)

This is the **primary location** from which you will fulfill online orders. **This address will appear on your invoices.**

Legal Name of Business	
Business Phone	
Street Address	
Apartment, suite, etc.	
City/Town	
Postal Code	
Province	

GENERAL INFO: STANDARDS AND FORMATS

Unit of Measure: It will be assumed that your store uses the Metric System, and that products will be weighed in grams. *If you choose to use Imperial Measures, please specify this in the comments section at the end of this form.*

Order IDS: All orders will be numbered beginning at 1001. This is a Shopify default that cannot be changed. You can, however, specify an order number prefix or suffix (e.g. A1001 or 1001A). *If you wish to do so, please specify this in the comments section at the end of this form.*

GENERAL INFO: STORE CURRENCY

The default setting is **Canadian Dollars** (CAD). *If you wish to use a different currency, please specify this in the comments section at the end of this form.*

ADDITIONAL LOCATIONS (OPTIONAL)

Specify the additional places you stock inventory, fulfill orders, and sell products. You can have up to four (4) locations on the Basic Shopify plan. *If you need to specify more than one additional location, please use the comments section at the end of this form.*

Additional Location Name	
Address	
Apartment, suite, etc.	
City/Town	
Postal Code	
Province	
Phone	

PLAN AND PERMISSIONS: PLAN DETAILS

You will automatically be enrolled in the **BASIC Shopify** store subscription. **The monthly cost is \$29.00 USD***. Other plans with extra features are available at an additional cost. **Approximately \$38.00 Canadian as of November 2020.*

PLAN AND PERMISSIONS: PERMISSIONS (OPTION)

Manage what staff can see or do in your online store's **admin area/dashboard**. You can have up to two (2) staff accounts on the Basic Shopify plan, and these can be added or modified at any time. When a staffperson is added, they will receive an email invitation which they must accept in order to be granted staff access. **It will be assumed that each staff person will have full admin access.** If full admin access is not required, specify in the comments section what admin abilities you'd like each staff to have (e.g. access to orders; access to reports; access to site design; etc.).

Staff Name	Staff Email Address

PAYMENT PROVIDERS: DETAILS

Shopify can be used with a variety of payment providers. **The default setting is to use Shopify Payments.**

This payment systems allows customers to pay by Visa, Mastercard, AMEX, Interac, Apple Pay, Google Pay, and Shop Pay. **All of these payment methods are activated by default.** The credit card rate is as low as 2.9% + \$0.30 CAD per order with no additional transaction fees.

Payout Schedule	Specify how often you wish to be paid out for sales made through Shop Pay. Click in the field above and then use the controls on the right to select an option. These are the only options available in Shopify; they cannot be changed. Payouts to your bank account will appear with the label "Shopify". You will be notified by email when you receive a payout.
Day of the Week	If you chose to be paid " EVERY WEEK ", specify the day of the week you'd like to receive your payout. Enter a weekday (Monday, Tuesday, Wednesday, Thursday or Friday). Weekend payouts are not available.
Day of the Month	If you chose to be paid " EVERY MONTH ", specify the day of the month you'd like to receive your payout. Enter a number from 1 to 31.

SHOPIFY PAYMENTS: DETAILS

Before your sales can be deposited into your bank account, you need to provide some additional information. This is required by Shopify.

Business Type	Click in the field above and then use the controls on the right to select an option. These are the only options available in Shopify; they cannot be changed.
Business Number (BN)	
Business Address	We will use your store address specified on page 1 of this form unless you specify an alternate address above.

SHOPIFY PAYMENTS: PERSONAL DETAILS

The person associated with your account should be a business owner or significant shareholder.

Name	
Date of Birth	MMM/DD/YYYY

SHOPIFY PAYMENTS: PRODUCT DETAILS

Briefly describe the products or services that your store will offer to customers. One or two sentences is sufficient.

SHOPIFY PAYMENTS: BANKING INFORMATION

Specify the **transit**, **institution** and **account number** of your **primary bank account**. These numbers can be found at the bottom of a cheque (see example below) or by contacting your bank.

Transit Number	Institution Number	Account Number

**SHOPIFY PAYMENTS: PAYOUT CURRENCY**

The **default payout currency is Canadian Dollars (CAD)**. You need to make sure your bank account can accept deposits in the currency you choose. A currency conversion fee will apply to your transactions if your payout currency is different than your store currency.

NOTIFICATIONS: TO CUSTOMERS

Shopify has **built-in templates** for notifications that are automatically sent out to customers. We will use the default templates for all email notifications and you will have the option to modify these default notifications through the Shopify dashboard.

NOTIFICATIONS: NEW ORDERS

Specify the email addresses of the staff who should be notified when a new order comes into your store.

Recipient #1 Email Address	Recipient #2 Email Address	Recipient #3 Email Address

STORE LANGUAGES

The default language for all customer transactions and the Shopify account dashboard is **English**. Both can be set independently. If you wish to use a language other than English, please specify your choices in the comments section at the end of this form.

CHECKOUT: CUSTOMER ACCOUNTS

By default, during checkout the **customer is not required to create an account**. They will have the option to check out as a guest. If you want customer accounts be disabled or required, check an option below:

Accounts are optional Accounts are disabled Accounts are required

CHECKOUT: CUSTOMER CONTACT

By default, **the customer can check out using either their phone number or email**. You can change this option below.

Checkout using phone number or email Checkout only using email

BILLING: PAYMENT METHOD

When your store is ready to go live, you will be required to enter your credit card information. We will contact you when it is time to enter this information, or will instruct you on how to enter it yourself.

SHIPPING AND DELIVERY: DELIVERY METHODS AT CHECKOUT

By default, we will set up your store with **Local Delivery** and/or **Local Pickup** options. However, you do have the option to set up custom shipping methods and rates. Contact your Leech Printing Sales Representative if you wish provide out-of-town shipping options to customers.

Will you offer **Local Delivery**? Yes No

If **YES**, provide the following details:

Delivery radius (in kilometers)	Minimum order price	Delivery price
<i>Enter a whole number.</i>		
Delivery Information <i>This message will appear at checkout and in the order confirmation notification.</i>		

Will you offer **Local Pickup**? Yes No

If **YES**, provide the following details:

Expected Pickup Time	<i>Click in the field above and then use the controls on the right to select an option. These are the only options available in Shopify; they cannot be changed.</i>
Pickup Instructions <i>If you're offering curbside pickup, you can let customers know what to do when they arrive at your store.</i>	<input type="checkbox"/> <i>Use default message: "Bring your confirmation email when you come to collect your order."</i>

ONLINE STORE: THEME

Choose a theme from the "Free Shopify Theme Samples" document (PDF) which accompanies this form. **Focus on the style of the theme when making your choice; the graphics and colours can all be changed.**

Store Theme	<i>Click in the field above and then use the controls on the right to select an option. These are the only FREE theme options available in Shopify. PAID themes are available starting at \$140USD (approximately \$185CAD). Visit themes.shopify.com</i>
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ONLINE STORE: GOOGLE ANALYTICS

OPTIONAL: Google Analytics enables you to track the visitors to your store, and generates reports that will help you with your marketing. You may already have a Google Analytics account for another website. You can set up a separate profile on that account to track analytics for your online store.

Google Analytics Account ID	
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LEGAL: REFUND POLICY

Unless you provide a specific Refund Policy below, we will use the standard template provided by Shopify. You will have the opportunity to review and change this policy when you receive your website proof.

LEGAL: PRIVACY POLICY

Unless you provide a specific Privacy Policy below, we will use the standard template provided by Shopify. You will have the opportunity to review and change this policy when you receive your website proof.

LEGAL: TERMS + CONDITIONS

Unless you provide a specific set of Terms + Conditions below, we will use the standard template provided by Shopify. You will have the opportunity to review and change these terms when you receive your website proof.

TAXES: TAX REGIONS

You are responsible for collecting the required taxes on goods and services sold through your online store. By providing the following tax IDs, Shopify will automatically apply the required RST/GST/HST on sales to customers in the applicable provinces and territories. If you have operations in Saskatchewan, Quebec or British Columbia, you may be required to collect provincial taxes for those jurisdictions. **Please consult your accountant for direction.** Please provide us with any further tax details in the comments section at the end of this form.

Manitoba Retail Sales Tax (RST) Account ID	
GST Registration No.	

SOCIAL MEDIA

Please specify the links to the social media accounts you would like to display on your store (if applicable).

Facebook	
Twitter	
Pinterest	
Instagram	
Snapchat	
Tumblr	
YouTube	
Vimeo	

ADDITIONAL ITEMS TO PROVIDE

We will need the following digital assets in order to set up your site:

- **Logo** – We will use this logo for your main store. The size is determined by the how it is applied within the store theme, so the best option is to provide your logo file as large as possible (JPG or PNG format) or as a scalable EPS file.
- **Brand Guidelines (optional)** – If you have company branding guidelines (logo, typefaces, colours, images), please provide them. In their absence, we will use a colour scheme based on your logo. If you have specific requirements regarding typeface and colours, please specify them in the comments section at the end of this form. If you wish to select specific typefaces for your site, please visit **fonts.google.com**. These fonts are generally available for use within Shopify themes.
- **Social Sharing Image (optional)** - When you share a link to your store on social media, this image will be shown in your post. The recommended file size is 1200px by 628px. If you don't provide an image, we will create one using your store logo.
- **Products** – Your LP Sales Representative will supply you with simplified Product Spreadsheet that you can populate to provide us with the required product information. The spreadsheet contains some sample products that will help you understand how the data should be entered.

For each product, you will supply the following **REQUIRED** information:

- Product Name
- Product Description – just a sentence or two to describe the item
- Price
- Whether tax is to be charged on the product
- Whether you want to track inventory
- Number of items in stock (if you are tracking inventory)
- Whether the product is physical (e.g. a book) or digital (e.g. a subscription or membership)
- Weight (only required if you plan to ship products)
- Product Collection(s) into which the item falls (also known as Product Categories)
- Variants (e.g. Small, Medium, Large for a t-shirt — and the associated price, quantity on hand, and SKU)

For each product you can also supply the following OPTIONAL information:

- Tags (words that describe the product; these are used if customers search your site for products).
- The date on which a specific product becomes available (i.e. preload products for future release).
- "Compare At" price
- Your cost for the product
- SKU (Stock Keeping Unit)
- Barcode (ISBN, UPC, etc.)
- Product Type (e.g. shirt)
- Vendor (e.g. supplier / brand name)
- A name and description to be used by search engines, such as Google, when displaying a link to your product
- **Product Images** – The recommended resolution for product images is 2048 pixels by 2048 pixels. However, for the zoom-in functionality to work for product images, they must have a minimum resolution of 800 pixels by 800 pixels. Please provide your images at the highest resolution possible. Smartphone images are generally okay, or you can source images from your suppliers.
- **Product Collections** – You can organize your store into specific categories, which Shopify calls Collections. We will take the collection names from your Product Spreadsheet, as you will specify the Collections associated with each product you enter.
- **Collection Images** – The recommended resolution for collection images is 2048 pixels by 2048 pixels (minimum resolution of 800 pixel by 800 pixels). Please provide your images at the highest resolution possible. Smartphone images are generally okay, or you can source images from your suppliers.

COMMENTS

Please provide an additional comments or directions for setting up your online store.