

## Post-Design Task List for Koa Consulting Clients

To begin, thank you for choosing Koa Consulting! If you are reading this document, then you have approved your final website design and we are ready to guide you through the final steps towards the completion of your website. Koa Consulting offers complete website solutions to make your Internet marketing strategy an easy one; however we know that not everyone has a budget for a 'complete' solution. As a way of working with a smaller budget you may undertake the task of creating your own website content and managing the ongoing details of your website. To ensure that we are able to complete your website in a timely manner, please read the following guidelines that we have put in place to help our clients stay on track.

### Domain and Website Accounts

If you have not sent us your existing web host or domain registrar account information, please do so now. This will help expedite things in the future when we are ready to make your website live. If you have lost any passwords for these accounts, please contact the associated company and have them send you a new one. Many of them may offer a way to retrieve your lost password through their website.

If you have email that is associated with your current domain name with a Web Mail account that has emails you would like to keep, please contact your computer tech for help with this process. If you need a good computer tech, we can recommend a great one that we use.

### Content/Copywriting

If you have signed up with a Copywriting or Content Creation package with us we will be contacting you soon to begin this process if we haven't done so already. If you plan to write your website content yourself, please send us this content as Microsoft Word or Adobe PDF documents. As a last-resort we can take the content in hard-copy format, but we may have to charge an additional fee if we have to retype everything, so please be warned. Overall, the better you organize and format your content, the easier it will be for us to get an idea for how you would like it to be used. One last thing, but definitely not the least important: remember to run your spell-checker! If you are providing us the content, we cannot be responsible for typographical or grammatical errors, and it is in your best interest to do the basics.

As for images and other web media, please send us your images in standard web formats (e.g. JPEG, GIF, or PNG). Send us any logos of affiliations that you would like or are required to have on your website as well.

If you need to send us a large number of images, media, or files in general, we recommend compressing them into a single file using a Zip utility like WinZip (on a PC) or Stuffit (on a Mac) and then, depending on the final size, either email it as an attachment, or use the free service [www.YouSendIt.com](http://www.YouSendIt.com). If you are unsure of the best method just give us a quick email and we can advise you.

### Did you sign up for an Online Store?

If you have an online store or plan to sell products on your website, we will need a few more pieces of information to get things setup.

- Product List: A list of products you plan to sell and their associated images.
- PayPal Account Info: If you plan to offer PayPal as a payment method we will need your PayPal email address and account information.
- Merchant Account Info: If you plan to use a separate merchant account for your payment processing we will need your merchant account information.
- Shipping Matrix: How much do you want to charge for shipping; per item or a percentage?
- Tax: do you charge tax and if so only to in-state buyers?
- Terms of Service: What are your terms, and do you want to require buyers to approve during the checkout process?
- Legal Policies: Are there any miscellaneous legal policies or disclaimers you want people to be aware of?
- Return Policy

A few notes to mention:

- Need help with getting some quality photos of your products? Let us know, we have a great photographer we can recommend.
- Unsure of what kind of legal policies or terms of service you should provide? Our suggestion is to look at the competition or look at some of the large mainstream online stores to see what they provide.

### **E-mail Accounts**

An essential part of any website is having e-mail accounts associated with the domain name. If you would like to have email setup through your domain name (e.g. [yourname@yourdomain.com](mailto:yourname@yourdomain.com)), please send us a list of email addresses that you would like us to create. Also, if you would like us to have some of these addresses simply forward mail to another address just say. As a part of your website with us we will create your email accounts and enable Web Mail access so you can retrieve your email remotely. Before your website goes live we will send you a guide to help you configure the email software on your computer. If you would like us to provide additional assistance in configuring your email software please let us know in advance as there will be an additional charge.

### **Support and Training**

Before your website goes live we will e-mail you a guide with step-by-step instructions and illustrations that show you how to manage many aspects of your website. It would be a good idea to review this guide before we do our final website training session, as it will make the overall concepts much more familiar.

All of our content-managed websites come with a training session where we will show you how to manage your website. We will schedule this training around the time we are ready to make your

website live. Please let us know how you would prefer to do the training; the various options are for you to come into our office or, if you have high-speed internet, we can do remote training over the Internet and using the phone. Remote training is very easy and especially useful for our clients that are located in another geographical area.

We offer free basic technical support for a predetermined period once your website goes live. This period of time may be stated on your initial website contract or in the package details. Our basic support plan includes phone calls during regular office hours of Monday through Friday (9-5) and also 24/7 email support. As a general rule we suggest that you send an email first with a description of your request or the problem you are having. Please be as detailed as possible, and if you are reporting a problem, give us any relevant information on how to reproduce it. We take support very seriously and do our best to respond to all requests within just hours and in many cases within minutes. If you feel that your issue would be best suited to tell us over the phone, please give us a call.

A common question we get is “What if I need ongoing support help?” Another one is “I may need another training session, can you help?” Don’t worry, we have thought about this and have options for you. We offer a discounted support and training rate for existing clients, and if you want to save even more, we offer pre-paid support plans at a larger discount. Just ask for more details. We want you to know that we are here and will continue to be here to help, whether you are too busy or if you just want some hand-holding, give us a call.

### **In Closing**

If this is all a bit too much to take in at once, not to worry, we have a simplified checklist of what you need to do at the bottom of this document, just scroll down a bit.

We are always looking for ways to streamline our processes to make things even easier for all of our clients. If you find this document helps please let us know. If you find there are areas that can be made better or have suggestions for improvements, let us know too. We would like to know if there are ways we can serve you, our valued customer, better.

Thank You and Mahalo!

Koa Consulting Staff

Here is a quick checklist of what we will need from you if you have not already given it to us.

### Post-Design Client Task Checklist

- **Domain and Website Accounts**
  - Do we have your user information for your:
    - Domain Name?
    - Web Hosting?
- **Content**
  - Do we have your content? Did you want us to write it for you?
- **Online Store**
  - Do we have your Product List?
    - Pricing/Description
    - Product Images
  - PayPal/Merchant Accounts?
  - Shipping/Tax Information
  - Terms of service and Legal Information such as shipping, returns and exchanges?
- **Email Accounts**
  - What email accounts would you like to use/or which do you have already in use?
  - Don't forget to back up your old email until this point

We will need this information at your earliest possible convenience. The faster you can get this to us, the faster we can get your website online. If you have any questions about the above, please let us know, we're here to help. Oh, and have a great day!