Task List for Koa Consulting Clients

To begin, thank you for choosing Koa Consulting! If you are reading this document, then you have begun the process of having Koa Consulting create a custom website for you. We are ready to guide you through the steps towards the completion of your website. Koa Consulting offers complete website solutions to make your Internet marketing strategy an easy one. 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 you.

Domain and Website Accounts

If you have an existing website, please make sure you have provided us any existing web host or domain registrar account information. 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 email messages or addresses that you would like to keep, please contact your computer technician for help with this process. If you need a good computer tech, we can recommend one.

Content Creation and 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. We suggest you create one document for EACH page on the website. This way you can organize the content verbiage, add images, and organize the page to your liking before you hand it over to us. 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 very important item: 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 be certain there are no spelling and grammatical errors.

If you will be sending us images and other Web-based media, please send them in standard web formats (e.g. for images use JPEG, GIF, or PNG and for video FLV, SWF, or MOV). Send us any logos of affiliations that you would like or are required to have on your website as well (e.g. Better Business Bureau, AAA, BNI, etc).

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 to us as an attachment, or use the free service www.YouSendIt.com. Email generally works for files that are less than 5 Megabytes in size. If you are unsure of the best method just send us a brief email and we can advise you.

If your website comes with a Blog:

We will need some basic information to get started, including:

- Blog Name or Title (e.g. "The Hawaii Coffee Blog")
- Blog Description - just a sentence or two that describes what the purpose is and other related details
- The first two blog entries that you would like to use

If your website comes with 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.

If your website comes with an Image Gallery:

- We will need a list of your gallery categories and sub-categories (e.g. "4th of July Event" or "Client Portfolio").

- We will need you to give us the images you wish to use on the website. These should be good resolution (at least 600x400 pixels in size). We suggest you use a "Zip" utility to compress these into one file and then send them to us via email or by using the free service at www.YouSendIt.com.

E-mail Accounts and Addresses

An essential part of any website is having email. In most cases is it best to have email setup through your website and domain name (e.g. name@yourdomain.com) rather than a free email provider. If you would like us to setup email using your domain name 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 let us know (e.g. forward support@yourdomain.com to mike@yourdomain.com). As a part of your Koa Consulting website hosting plan, we will create your email accounts and enable Web Mail access so you can retrieve your email remotely. If you are familiar with setting up your POP/SMTP/IMAP mail accounts we will provide you with the account information needed before your website goes live. If this is "Greek" to you then we suggest you contact a computer technician for assistance with this before the website goes live.

Support and Training

For those clients that will be using the "Joomla" Content Management System, Koa Consulting provides a "Getting Started Guide" with step-by-step instructions and illustrations that show you how to manage many aspects of your website. This guide is available on our website here: http://www.koaconsulting.com/support/documents.html. We strongly urge you to review this guide before we schedule your website training session so you will be familiar with the basic concepts. 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. This period of time may be stated on your website contract or in the package details. Our basic support plan comes with 24/7 email support and may also include phone support during regular office hours (Monday through Friday 9 am - 5 pm). 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.

Ongoing Maintenance and Support Plans

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 ongoing support plans as well. Just ask for more details or you can view them on our website here: http://www.koaconsulting.com/support-maintenance.html. We want you to know that we are here and will continue to be here to help, whether you are too busy to do it yourself or if you just need some advice, please give us a call.

In Closing

Creating a website can be a complex and time-consuming process, but we have done a great deal to simplify things and make this process easy. In addition to the above information, we have also included a simplified checklist of what you need to do at the bottom of this document, just scroll down.

Lastly, 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 ready? Would you like us to write it for you?

- **Blog**

  - We need the title, description, and first two blog entries.

- **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?

- **Image Gallery**

  - Do we have your category list?

  - Do we have your images?

- **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 and addresses

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 are here to help.