

Ultimate WooCommerce Checklist

Thank you for downloading the Ultimate WooCommerce Checklist by Anphira! For more details on any of the sections, please refer to the blog post:

<https://www.anphira.com/wordpress/woocommerce-questions/>

The purpose of this checklist is to determine what information you need to gather for your eCommerce website.

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Store Setup

Start by gathering the important information about your store.

- Business address
- Shipping from address
- Email address for orders
- Privacy Policy
- Terms of Service
- Cookie Policy
- EULA (if applicable)
- Currency
- Measurement System (ie: Kilos vs Pounds)

Selling Setup

Are you actually selling online (cart, checkout, order generated)?

- If no, you get to skip sections like shipping, order management, payment processors, cart & checkout, sales tax, coupons, affiliates, and integrations
- If yes, keep going!

What countries do you sell to?

- Remember, you may sell to more countries than you ship to (ie: if you sell digital products)

Will you allow reviews?

- If yes, you'll need to decide your policy for how you handle reviews & approving them

Do you need to manage stock?

Shipping Setup

Do you ship, if so, where do you ship to?

- If no, skip the rest of this section

Do you have handling fees?

Measurements - many shipping systems require measurements (height, width, length, weight) in order to figure out box packing

How are you going to generate your shipping fees?

- Free shipping - for all orders, or just those over a certain ones?
- Flat rate shipping - common with companies that have pretty uniform weight products or simple calculations
- Shipping provider calculated - use a shipping plugin that ties into major providers rate systems like UPS, FedEx, etc to get current rates
- Shipping services - do you need things like drop shipping, or 3rd party systems like ShipStation?

Order Management

How are you going to manage your orders?

- Who is responsible for going in and marking orders in WooCommerce?
- If you have non-physical products, there is frequently little order management needed, but you may need a plugin to help
- Do you need reports generated?

Do you need to tie into other order systems or send your order info elsewhere?

Do you need to integrate your orders with a marketing system?

- CRM (customer relationship management)
- Email lists (ie: MailChimp, Active Campaign, etc)

Payment Processors

How are you handling payment?

- Offline payment (ie: invoice me, send a check, cash on delivery, etc)
- PayPal basic is included in WooCommerce
- Stripe is very common & popular
- Square is also popular, especially for industries which don't meet the terms of service for PayPal & Stripe)
- Other processors - there are lots of other processors out there.

Cart & Checkout

Do you need to customize the cart/checkout?

- Distraction free cart/checkout
- Abandoned carts
- Many other options out there

User accounts

- Do people need an existing account to checkout?
- Do you want to allow creation of an account?
- Do you need any integration with a 3rd party account system?

Products

How will you organize your products?

Do you have up-sells/cross-sells/related products?

Are your products variable (ie: t-shirts that require you to pick a size before adding to cart)?

Do you have physical or digital goods?

Do you have subscription products?

- If yes, does the subscription need to be handled on the WooCommerce site or elsewhere?

Do you need product extras?

- There are lots of possible extras, do you actually need them?

How many products do you have?

- Gather all information for your products - lists may be good, spreadsheets may be good, folders on your computer may be good. How you organize the information will depend on how much information you need to organize.
- Photos
- Categorization
- Price
- Short description
- Long description
- SEO meta description
- Size & weight (if needed)
- Any additional info (see all of the previous questions in this section)

Who will enter all of those products?

- Do you need remote connection to something else?
- Do you need bulk import abilities?

How will product information be maintained going forward?

Sales tax & VAT

Contact your tax professional and find out what you need to charge and when. Incorrectly handling taxes can cost you a lot of money.

- Do you need to collect on some products or all?
- Do you need to charge different taxes on different types of products?
- Do you need to charge different taxes to different customers?

Consider a tax charging service to calculate the proper taxes.

Coupons

Do you need coupons?

- If so, just simple ones or complex ones?

Do you need gift certificates?

- In store and/or online redemption
- If using in store - how will the value card be redeemed?
- Use all at once or split (hint: most customers expect to be able to split)
- Do you need printed certificates or QR codes?

Website SEO & speed

WooCommerce SEO is a lot more detailed than just installing a plugin.

Consider your schema

Image optimization

Caching & optimization

Removing unnecessary scripts

Other customizations

The sky's the limit on customizations that are possible, but remember the rule: the more you customize, the more you have to maintain going forward.

- Order emails
- Product display
- Product filtering
- Bulk purchasing
- Logged-in pricing
- Lots of other options

Affiliates or Vendors

Do you need to support affiliates?

Do you need to support vendors (ie: a marketplace type of website)?

3rd Party Integrations

Do you need to play well with others?

- Financial systems (ie: Quickbooks, etc)
- Zapier
- IFTTT
- Other plugins or systems (eLearning, event, membership, etc)

Ok, I'm overwhelmed with all of this

A lot of people get overwhelmed with the amount of options and what is right for their business and website. Most people find for building their store that they want to get a [professional developer](#) involved.

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<https://www.anphira.com/wordpress/woocommerce-questions/>