SECTION A / ALL CUSTOMERS

Tell us about your business

Complete pages 1-2 for any website. Complete page 3 for a shop and page 4 for an ERP.

1. Business name and industry

2. Contact person, phone and business email

3. Business address, service area and opening hours

4. What do you sell or do? Who are your ideal customers?

5. What do you want the website to do?

- ☐ Show information / services
- ☐ Take appointments or bookings
- ☐ Manage business operations
- ☐ Generate calls or enquiries
- ☐ Sell products online
- ☐ Other / not sure

6. Which website type interests you?

- ☐ Basic business website
- ☐ Website + ERP system
- ☐ E-commerce website
- ☐ Not sure - recommend one

7. Existing website / domain, or preferred domain name

8. Existing hosting provider and business email needs

9. Desired launch date and any important deadlines

SECTION A / CONTINUED

Plan the website design

Select the pages and features you need. Please share any branding files separately.

10. Which pages do you need?

- [ ] Home
- [ ] About us
- [ ] Services
- [ ] Gallery / portfolio
- [ ] Contact
- [ ] Testimonials / reviews
- [ ] Blog
- [ ] FAQ
- [ ] Booking / appointments
- [ ] Other pages

11. Which extra features do you want?

- [ ] Google Maps / business profile
- [ ] WhatsApp / live chat
- [ ] Newsletter signup
- [ ] Online booking
- [ ] Multilingual website
- [ ] Social links / reviews
- [ ] Customer login
- [ ] Website editing access

12. Logo, brand colours, preferred style and languages

13. Share 2-3 example websites or describe your preferred layout

14. What content is ready?

- [ ] Logo / brand files
- [ ] Text and service descriptions
- [ ] Product / business photos
- [ ] Need help creating content

15. When can you provide the content and who approves the design?

16. Who will update the site? Any training, backups or support needed?

17. Other requirements / must-have features

SECTION B / SHOP CUSTOMERS ONLY

Plan your online store

Skip this page if you do not want customers to buy products online.

18. Product types, number at launch and estimated future catalogue size

19. Product options (size, colour, etc.) and who provides product details

20. What payment methods do you prefer?

- [ ] Stripe
- [ ] PayPal
- [ ] Square
- [ ] Other / not sure

21. Do you already have a payment provider account? Which one?

22. How will orders be fulfilled?

- [ ] Local pickup
- [ ] Local delivery
- [ ] Ship within Canada
- [ ] International shipping

23. Shipping locations, rates and rules (flat, free, weight or zone)

24. Tax registrations and regions served (GST/HST/PST as applicable)

25. Store features

- [ ] Guest checkout
- [ ] Customer accounts
- [ ] Discount codes / gift cards
- [ ] Stock tracking
- [ ] Order status emails
- [ ] Physical store / POS sync

26. Return/refund, shipping, privacy and terms - ready or needed?

SECTION C / ERP CUSTOMERS ONLY

Plan your business system

Skip this page if you do not need a private business management dashboard.

27. Which business tools do you need?

- [ ] Dashboard & reports
- [ ] Inventory & SKU tracking
- [ ] Customer records (CRM)
- [ ] Online store sync
- [ ] Payroll / scheduling
- [ ] Quotes / invoices / payments
- [ ] Suppliers / purchase orders
- [ ] Marketing / newsletters
- [ ] Staff logins / permissions
- [ ] Multiple locations / warehouses

28. Number of users, staff roles and what each user can access

29. Current software, data to import and existing invoice/quote samples

30. Number of products/SKUs, locations, suppliers and inventory needs

31. Integrations (QuickBooks, Xero, POS, barcode, SMS or others)

32. Reports, tax settings, approval rules and marketing needs

33. Data ownership, storage location, backup, exports and support needs

34. Primary decision maker and any other special requirements

Please share sample documents and assets separately. Do not enter passwords or card details.