



# **SHOPPING CART ELITE WEBSITE SETUP**

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# Phase 1: Establishing Objectives, Effort & Process

This is where the whole migration plan will be established taking into account the main objectives, time constraints, effort, and available resources. This phase is fundamental because if essential business objectives or required resources fail to get appropriately defined, problems may arise in the following phases. Therefore, a considerable amount of time and effort needs to be allocated in this stage.

## 1.1 Agree on the objectives

This is necessary because it will allow for success to be measured at a later stage on the agreed objectives. Typical objectives include:

- Data
  - How many products do you have
  - How complex is the data
  - Are there dropdowns, bundles
  - Inventory
  - Rules
- Graphic Design
  - What kind of website do you like
  - Are there any requirements
  - Do you need any custom wizards
  - Do you need any custom forms
- Content
  - Besides products how many content pages
  - Do you have a blog that needs migration
  - Reviews that needs migration
  - Terms / Policies / FAQs
- Redirects
  - Do you have a sitemap
  - Do we install the discover JavaScript
  - Do we install the redirect JavaScript
- Setup
  - Configuring all the settings the store
  - Turning on best practice settings
  - Shipping settings and test
  - Payment methods settings and test
  - Go through a 100 point checklist
- Development
  - Are there any enhancement minor or major that need to be done to go live
  - Any features that must be there
- Marketing
  - Do we need to bring reviews elsewhere
  - Do we need to initiate Video SEO

- Do we need to setup marketplace categories for eBay / Amazon / Google Shopping
- Do we need to optimize the website
- What kind of engagement are you getting on the website
  - If it is under 40% you need to switch to Shopping Cart Elite NOW!
  - Where are you advertising
  - What URLs are being triggered
  - Minimum traffic loss / Minimum ranking drops

## 1.2 Estimate time and effort

Depending on the complexity of the migration the owner will have to participate in assisting the team in making the right decision. Shopping Cart Elite handles the complete A-Z migration in-house, but requires the owner to be available on demand when a question is needed.

If the migration is done wrong everyone will have to work day and night to recover those great rankings that have plummeted.

## 1.3 Data Process

Easy Data Feed is a Shopping Cart Elite company that is able to scrape, manipulate data from your old website, and then integrate it into Shopping Cart Elite. Each Easy Data Feed job is custom to each client and usually takes 7 days to complete.

The full process is outlined below:

Please watch the video to understand all the points of this system - [VIDEO](#)

1. **Form**
  - a. Client needs to fill out the form on where and how to get their data – form [www.shoppingcartelite.com/articles/welcome](http://www.shoppingcartelite.com/articles/welcome) under data section
  - b. The form will land inside SCE support desk
  - c. Administrator – Needs assign a data migration job for review in the Support Desk to within 48 hours.
2. **Samples**
  - a. Once the samples are uploaded, ensure that the client likes the way it is
  - b. Usually this is done during the trial
3. **CSV/SITEMAP – (START AFTER TRIAL ONLY)**
  - a. Once announcement in the client Skype group is made to proceed with the job then proceed
  - b. Get a CSV sheet from the client
    - i. **Find out if its scrapped from competitor**
    - ii. **Existing website**
    - iii. **Supplier**
    - iv. **Find out if he wants to include or exclude anything**
  - c. Get the SITEMAP

- i. Usually the URL can be found in [www.domain.com/robots.txt](http://www.domain.com/robots.txt)
- ii. Ask client if they have it
- iii. Ensure there is no hidden products in sitemap
  - 1. if there hidden products then use CSV for the scrape of any missing products

#### 4. Sitemap Scrape

- a. Scrape the website sitemap URLs to create groups of all unique possible products and indicate how you will you get the data and the data type you expect

##### i. DATA GATHERING

- 1.  EASY DATA FEED
- 2.  FROM CLIENT'S BACK OFFICE EXPORTED VIA CSV
- 3.  FROM CLIENT DIRECTLY VIA DROPBOX
- 4.  FROM CLIENT'S SUPPLIER AS A CSV

##### ii. DATA TYPE

- 1.  UNIVERSAL PRODUCTS (Ex:
- 2.  PRODUCT WITH ONE OPTION (Ex:
- 3.  PRODUCT WITH TWO OPTIONS (Ex:
- 4.  VEHICLE PRODUCTS WITH NO OPTIONS (Ex:
- 5.  VEHICLE PRODUCTS WITH ONE OPTION (Ex:
- 6.  PRODUCT WITH UPSELLS
- 7.  PRODUCT WITH ONE OPTION AND UPSSELLS
- 8.  PRODUCT WITH TWO OPTION AND UPSSELLS
- 9.  HIDDEN PRODUCTS

- b. Example spreadsheet here

- i. <https://drive.google.com/file/d/0Byv9QpDVbwf9dzZack1GNXhralU/edit?usp=sharing> – Video
- ii. <https://www.dropbox.com/s/uyzfgkkbvw7k8tn/sampleforDataSystem.csv> - **Spreadsheet**

- iii. Spreadsheet should contain:

- 1. 301 redirect URL
- 2. Breadcrumbs of categories
- 3. Unique Option sets

- c. If the CSV sheet had to be used to retrieve hidden products, it should have been combined with the scraped data CSV sheet (Have developer merge it)

- d. **MAKE SURE THERE ARE NO QUOTE PRODUCTS AS THOSE MAY HAVE TO BE DONE MANUALLY**

- e. Deliver this final CSV into private Skype Group

#### 5. Sitemap Analysis

- a. Separate all possible variations inside excel as per this video **Spreadsheet - <https://drive.google.com/file/d/0Byv9QpDVbwf9eFNTNmNwSzc5YUk/edit?usp=sharing>**

Video -

<https://drive.google.com/file/d/0Byv9QpDVbwf9bnNPRkVvRDdYa2M/edit?usp=sharing>

## 6. Sitemap to SCE analysis

- a. Make a copy of this spreadsheet  
[https://docs.google.com/spreadsheet/ccc?key=0Aiv9QpDVbwf9dG5CcHQyQ2JQOFpYSmRCM0g0aTRUdHc&usp=drive\\_web#gid=0](https://docs.google.com/spreadsheet/ccc?key=0Aiv9QpDVbwf9dG5CcHQyQ2JQOFpYSmRCM0g0aTRUdHc&usp=drive_web#gid=0)
  - i. Make a column for each version of the product Ex: Column A = Universal / Column B = Product with Option
  - ii. Go through all required fields and make sure that you can access the correct data for each field from the data available to you from the client website and CSV file
  - i. If you are missing any data HIGHLIGHT THE MISSING DATA IN RED
- b. Deliver all spreadsheets from above points to Data Manger through Private Skype group

## 7. Reviews Sitemap to SCE analysis

- a. Estimate Deadlines
- b. Data Manager needs to review the job scope from spreadsheet from the above step
  - i. If the job requires customer interactions due to missing:
    1. Missing Titles
    2. Merge Options
    3. Missing Categories
    4. Missing some other data
      - a. The client should first try to provide this data themselves, if not possible then ask CEO
  - ii. If the job is complicated inquire with CEO
  - iii. If the job is simple and has been done before proceed with next step

## 8. Client Sign Off

- a. Data Manager should meet with client and:
  - i. Get a CSV spreadsheet if available from client
  - ii. Ensure there is no issues such as missing dimensions, bad images, bad descriptions, etc. If there is you must address it before moving forward.
  - iii. Client has to agree on the timeframe that it will take the job
  - iv. Client has agree that what you are about to scrape and input into the website is 100% everything that he will require.

## 9. EDF Scrape Development (DO NOT START UNTIL PREVIOUS STEP IS COMPLETE)

- a. Scrape the website utilizing the spreadsheet from previous step
- b. Pass the scraped data through the EDF validator and make sure there is ZERO ERRORS**
- c. Once the scrape is complete then take the CSV spreadsheet if available from client and merge it with scraped data using EDF
- d. Deliver the finished CSV to the private skype group for next step

## 10. EDF Sample Run via EDF (SAMPLE 1000 ROWS)

- a. Take the spreadsheet from previous step and pass it through the EDF validator to ensure that it has no mistakes.

#### 11. Review Scraped Data (Sample)

- a. Align all scraped data to the appropriate SCE columns
    - i. [https://docs.google.com/spreadsheets/ccc?key=0Aiv9QpDVbwf9dG5CcH QyQ2JQOFpYSmRCM0g0aTRUdHc&usp=drive\\_web#gid=1](https://docs.google.com/spreadsheets/ccc?key=0Aiv9QpDVbwf9dG5CcH QyQ2JQOFpYSmRCM0g0aTRUdHc&usp=drive_web#gid=1)
    - ii. <https://drive.google.com/file/d/0Byv9QpDVbwf9ZXk2RFB0SmFWMUK/edit?usp=sharing>
    - iii. <https://drive.google.com/file/d/0Byv9QpDVbwf9ODMzUkRlBmc4eUU/edit?usp=sharing>
    - iv. <https://drive.google.com/file/d/0Byv9QpDVbwf9UFRuVmZEZkRVWG8/edit?usp=sharing>
  - b. See which data is richer, one that is scraped or one that was provided by client via CSV
    - i. Ex: If the description from the client's CSV is cleaner than the one scraped from the website, use the clients CSV description
  - c. Make sure that only the allowed SCE fields are in the final spreadsheet and ensure that the data has all required columns required by Shopping Cart Elite
- a. Review each column to ensure that you can't see any #VALIDATION ERRORS
  - b. Prepare the spreadsheet for import

#### 12. EDF Validate via EDF (SAMPLE FILE)

- a. Take the spreadsheet from previous step and pass it through the EDF validator to ensure that it has no mistakes.

#### 13. EDF Run via EDF (Full Data)

- a. Take the spreadsheet from previous step and pass it through the EDF validator to ensure that it has no mistakes.

#### 14. EDF Validate via EDF (FULL FILE)

- a. Take the spreadsheet from previous step and pass it through the EDF validator to ensure that it has no mistakes.

#### 15. Review Scraped Data (Full)

#### 16. Polish the CSV

- a. Brand is not inside Anchor Text
- b. Brand matches what is inside the Product Title
- c. All the cases of title and anchor text are Title Case and match each other
- d. All Categories are titles case and consistent with similar products
- e. <http://videos.shoppingcartelite.com/medias/t9mf8185uk>
- f. POLISH SCENARIOS
  - i. <http://take.ms/qTgti>
  - ii. <http://take.ms/VQiTp>

#### 17. Batch Update Sample

- a. Do a batch update of 5 rows only into Shopping Cart Elite
- b. Ensure the data is uploaded and visible on the website without mistakes
- c. Send the CSV sheet and the links of the sample data into the private Skype group
- d. Data Manager should review the sample and CSV, if everything looks good then

#### 18. Show to Client

- a. Meet with the client to confirm this is 100% everything that he needs uploaded

- i. Confirm that once this is uploaded you will be complete with the data project
  - ii. Once the client confirms go to next step
- 19. **Batch Update Full CSV (DO NOT START UNTIL PREVIOUS STEP IS COMPLETE)**
  - a. Upload the full CSV and ensure it is properly showing up on the website
  - b. Export the CSV sheet from SCE and pass it through
    - i. IMAGE EDF
    - ii. EDF VALIDATOR
  - c. If EDF has no errors, announce in the private group that the data has successfully uploaded
- 20. **MANAGER REVIEW**
  - a. Data Manager needs to review the final upload from the last step
  - b. If everything looks good, have the client review it and sign off that the job is complete

## 1.4 Graphic Design Process

Shopping Cart Elite has over 50 pages apart of the cloud hosted template that will be activated for each client. The full sitemap is located here - <https://www.dropbox.com/s/7fy6eubtdks2k9g/SCE-Sitemap.xlsx>

Some clients think their website consists of only two pages, a homepage and a product page. In reality there is 50 pages that would need to have the same look and feel between them all.

Using Shopping Cart Elite cloud hosted template we would achieve a full roll out for the custom design across all webpages. We have a cloud hosted template that we use for all of our clients. It is our best converting template and we are constantly up-keeping it. We have done over 100 clients consulting sessions with this template, and we are 100% confident that it will improve your conversions.

Use utilize Mockvault to showcase you the mockup of your design once ready, and communicate through Mockvault until the mockup is approved. After it is approved we implement the mockup on your CSS of our website.

## 1.5 Content Process

Content migration is the part that is always overlooked. The usual assumption is there is no content that needs to be moved over, or a few webpages at best. In reality majority of our clients have over 50 webpages to move over, and some have thousands that include Dealer Locators, Blog Posts, Questions and Answers, Reviews, Testimonials, Forms, Videos, Category Images, Category Descriptions, etc.

Content migration is a manual process in most cases and requires an expert that is familiar with HTML and the owner's product.

The scope of the process is to identify all content related pages, and make a plan on who and how it will be moved over.

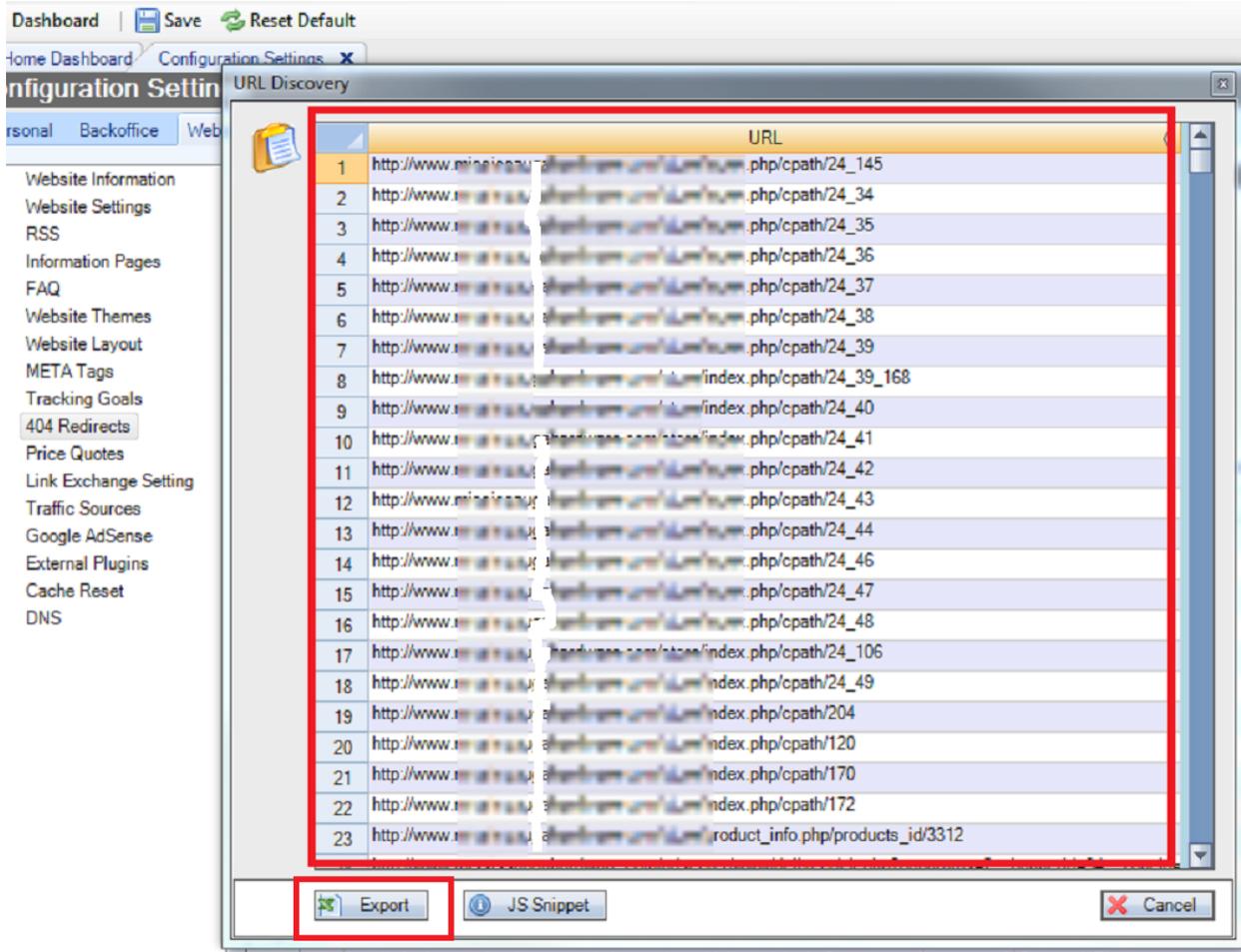
Shopping Cart Elite uses a test server with a demo URL to do the whole migration so your website is not affected. The soft launch and A/B test can also be done on the demo URL. The demo URL will block search engine crawlers from indexing the website, so there will be no issues with duplicate content. Any duplicate content will automatically get a canonical SEO tag to avoid search engine from penalizing the webpages.

## **1.6 Redirects**

During the process of migrating over your current site to Shopping Cart Elite you should capture all of your deep or internal links on your web site. All of these should be recorded and then mapped over to your new site. Typically these are links that are not part of the site map.

Shopping Cart Elite has a built in function that will provide you code to use in assisting in this process of capturing your current links.

The process is a script is installed on your old website and every visitor that lands on the webpages (Human or Bot) will trigger the script and input the landing page URL into Shopping Cart Elite.



Once there is no more URL that are being added we would have identified 100% of all URLs from your old website.

The next step is to either run an A/B test where the old website traffic and be routed to the new one through JavaScript, or whenever you are ready you can switch the website over to the new DNS.

## 1.7 Setup

The setup process consists of three sub processes

- Setup – Initial setup done by our team
- Pre-Launch – Meet with client to do an internal soft launch of the website
- Launch – Meet with client to do an official launch

The setup process usually takes a minimum of 20 hours, and can take as long as 300 hours. The highlights of the checklist is below:

**NOTE: Note that orange processes below may not be included with your migration. If they are to be included, ensure they are a part of your agreement.**

- FILL VIP SETUP FORM
- SETUP WIZARD
- CONFIRM WITH CLIENT ABOUT ADWORDS AND REDOING THEIR URLS BEFORE LAUNCH.
- **EBAY OR AMAZON SETUP**
- ENABLE REVIEWS
- EMPLOYEE SETUP
- SUPPLIER SETUP
- CLOUDFLARE DNS
- WEBSITE TITLE / META TAGS FOR HOMEPAGE
- FAQ
- TERMS/PRIVACY/RETURN POLICY CREATED OR MIGRATED
- CHANGE COPYRIGHT MESSAGE
- MASTER SETTINGS
- PAYPAL SETUP
- TEST PAYPAL CHECKOUT PROCESS IN DEMO MODE
- MERCHANT ACCOUNT
- TEST MERCHANT ACCOUNT SETTINGS
- BCSW OFFER?
- SHIPPING RULES
- DEACTIVATE AUTOMOTIVE FEATURES
- UPS SHIPPING CREDENTIALS
- FEDEX SHIPPING CREDENTIALS
- ENDICIA SHIPPING CREDENTIALS
- CANADA POST SHIPPING CREDENTIALS
- FREIGHT QUOTE CREDENTIALS
- PRIOR TO SWITCH AVG ORDERS
- INSTALL URL DISCOVERY SCRIPT
- CLOUDFLARE TRANSFER DNS
- TRANSFER VIDEOS
- TRANSFER BADGES
- PLUGINS (LIST ALL)
- SUPPORT DESK SETUP
- **AUTO RESPONDER**
- **AUTO RESPONDER TEST**
- **TRANSFER ARTICLES OR CUSTOM LANDING PAGES**
- CONFIRM DOMAIN NAME THEY WILL BE USING
- MEGA MENU SETUP (AFTER DATA IS COMPLETED AND UP ON WEBSITE)
- FOOTER / ARTICLE LINKS (AFTER DATA IS COMPLETED AND UP ON WEBSITE)
- TEST SHIPPING
- SINGLE AND MULTIPLE
- QUANTITIES (ADD 50 QTYS OF ITEMS)
- SITEMAP EDF
- IMAGE EDF

- GO THROUGH SUPPLIERS
- CHECK IF ALL WAREHOUSES
- ARE ENTERED
- GET INVENTORY DATA
- TO REVIEW FROM CLIENT
- LOAD INVENTORY
- WITH CLIENT
- 301/404 REDIRECTS
- IMPORT CUSTOMERS
- IMPORT ORDERS
- SUPPORT DESK TEST
- **ADWORDS SETUP**
- **REMARKETING SETUP**
- **FEATURED PRODUCTS**
- **TRANSFER SPECIALS / DISCOUNTS**
- SEARCH FILTERS
- **AUTOMATE INVENTORY**
- **AUTOMATE REPRICING**
- **BLOG MIGRATION**
- **TRANSFER REVIEWS**
- **TRANSFER TESTIMONIALS**
- ADDITIONAL EMAIL SETUP
- **SUPPLIER TRACKING AUTOMATION**
- **BEST PRACTICE CALL TO ACTIONS**
- SSL CHECK
- TEST SSL CONNECTION
- FIREBUG CHECK
- TEST QA DOCUMENT
- SITEMAP EDF
- IMAGE EDF
- TEST SHIPPING
- SINGLE AND MULTIPLE
- QUANTITIES (ADD 50 QTYS OF ITEMS)
- TEST PAYPAL CHECKOUT PROCESS
- MERCHANT ACCOUNT FRONT END TEST
- CHECKOUT TEST
- INVOICE
- **SUPPLIER BOXES SETUP**
- ACTIVATE TEA
- DISABLE ADS MASTERCART
- **WHOLESALE SETUP**
- ACTIVATE A-B TEST
- PLUGIN RENDER TEST
- PRODUCT EDF

- SHIPPING LABEL
- SUBMIT SITEMAP
- SSL CHECK
- TEST SSL CONNECTION
- CHECK EMAIL WORKING OR NOT
- TEST 15 REDIRECTS FROM GOOGLE
- **LAUNCH**
- 24 HOURS AFTER LAUNCH CHECK AVERAGE ORDER IS MORE OR LESS THAN HIS OLD WEBSITE
- PREVIOUS/NEW ORDER RESULTS

When we do the final launch everything is tested perfectly, and we get no complaints once the new website is live. All the links are correct, emails are working, DNS is propagated, redirects are redirecting, merchant account is working, shipping is working, **and everything is usually perfect.**

## 1.8 Development

Shopping Cart Elite operates under Agile Software Development schedule. We are able to roll out features that customers need. It is extremely rare that we don't already have an ecommerce feature that you need, and in the case that we don't we can deploy it for you on demand. We have the most flexible core framework for ecommerce in the world.

Whenever we build a new feature it is crucial to understand that we are not doing a custom feature that is strictly for one client, and we are not hard coding anything just to make it work. We have to create the feature for everyone and we have to think of every possible business case scenario, so we don't have to re-develop it in the future. Every feature we develop is released to every client in Shopping Cart Elite, so it is essential we follow this process.

### PROCESS

#### SPECIFICATION

- **Business Case Scenario** – We draw out charts of all possible business case scenarios for a feature
- **Current and Future Conflicts** – We need check if the new feature will conflict with an existing feature and how it will conflict with future features. For example, we have an automotive vehicle search on the website that starts with MAKE MODEL YEAR. A customer requested we change that to YEAR MAKE MODEL because that would eliminate so many models in certain cases. The client thinks this is simple, just change the places of the drop down, and it will work. But this five minute enhancement actually took two months. There were over a dozen conflicts. The MAKE MODEL YEAR was first built from a database then cached on the website. The database was used in four separate places on the website as 8 separate places on in the back office. So once we switch the database to look up year first, all 12 places would need to be modified. A client might request a very basic feature, but due to the conflicts the price of the enhancement would cost more than some genuinely big new features. Shopping Cart Elite has over 4 million lines of code, unfortunately a feature can't be judged by its initial development only.

- **New Development or Enhancement** – Sometimes developing a new feature doesn't make sense because we can enhance an existing feature, and sometimes enhancing a feature would take so much work that we find a new way to address a certain feature. Both scenarios have their Pros and Cons.
- **Project Scope** – If we feel that this feature is not aligned with our core focus, target market or it is outside of our framework. We will reject the feature altogether. At times, the feature the client wants is already on our to do list, and we either reimburse up to 70% of the development cost or do it free.

## DESIGN

- **Back office UI** – Design a user friendly screen in the desktop back office application for the new feature.
- **Back office Setting** – Add a setting to the global setting for all customers and add it to the setup wizard
- **Website UI Graphic Design** – Design a UI for the website
- **Website UI HTML/CSS Coding** – Slice and apply the design on the template. Map all Classes to themes in the settings

## DEVELOPMENT

- **Backoffice Development** – Develop the feature in the back office and address all the conflicts
- **Front End Development** – Code the new design on the website, merge themes with all customers and optimize the performance of the feature
- **Middle Tier Development** - Some features require a service to be developed. For example an auto responder that must send out an email on a certain schedule, or Quickbooks integrations which requires communication every minute.

## TESTING

- **Beta Release** – Release feature on the beta server for testing
- **QA Testing** – Spend X days testing the feature to make sure it is bug free
- **Website UI testing all browsers** – Test the feature on all desktop and mobile browsers
- **Back office UI testing** – Test the back office to make sure the feature works and no conflicts arise

## DEBUGGING

- **Missed Enhancements** – It is common that we miss something in the business scenario and have to come back to enhance it.
- **Bugs** – Even though the developers release the code bug free, it is only bug free on their computer environment. Once in beta environment bug commonly arise. Most new features that are released have bugs in them, it is rare for it to be released bug free. All bugs must be fixed before production release.

- **Future Upkeep** – When we introduce a feature we need to upkeep it forever, depending on the liability of the feature and how it will be used by all customers the rate will change for the project.

## SUPPORT

- **Tutorials** – Once the project is closed, a tutorial is designed for the new feature and released into the knowledge base.
- **Customer Support** – Some customer do not like to go through the tutorials, so they request customer support. Depending on the complexity of the feature we need train not only the client who ordered the feature, but also future customers who will use it.
- **Managing** – Each project must have a dedicated manager who is responsible to start and close the project. The manager will be the bridge between the client, developers, designers and Shopping Cart Elite.

## 1.9 Marketing

So the website is finally live and you're settled in, now what? This is usually the time when the owner gets surprised when they use a Shopping Cart Elite competitor, they are given a dozen ways to waste thousands of dollars with third party companies without benchmarking anything because their software doesn't have any marketing tools.

The good news is Shopping Cart Elite has TEA Software, Omni Channel Hub, Email Auto Responder and Automated SEO that can start being utilized to drive revenue, so you don't have to worry what will you will be doing when you go live. But most of these apps do need to get set up. For example setting up Google Shopping can take 3 hours, setting up Amazon categories can take a whole day.

In addition benchmarking the website to ensure it is performing the same or better compared to the old website is also important to ensure there is no leaks in the new website.

The marketing process is usually negotiated in advance between the owner and Shopping Cart Elite, but we do everything in house and we have systems prepared to make your campaign successful.

## 1.10 Communicate the Migration Plan

Once the migration process has been established it needs to be communicated to the site owner as well as to those that will implement the recommendations. Each part needs to understand what they are expected to do as there is no space for mistakes, and misunderstandings could be catastrophic.

Most development agencies tend to underestimate site migrations simply because they focus almost exclusively on getting the new site up and running. Often, they do not allocate the necessary resources required to implement and test the URL redirects from the old to the new site. It is the SEO's responsibility to make them realize the amount of work involved, as well as strongly request the new site to move first on a test server (staging environment) so implementation can be tested in advance. No matter how well you may have planned the migration steps, some extra allocated time would always be useful as things do not always go as planned.

In order for a website migration to be successful, all involved parts need to collaborate in a timely manner merely because certain actions need to be taken at certain times.