Implementation Checklist

Preparation Questionnaire

In order to get Shopify and RMS Integration through Shopify as quickly as possible, there are a number of things you need to check, consider and decide upon before diving in head first. This checklist and the associated guidance notes should help you make the right decisions for your business.

It is also useful in case you need help through the process, as we will understand exactly what you are trying to achieve.

1. Deployment Topology

1.1. I am installing RMSify into a…

	Single Store Environment	If you only have one store
	Standard Headquarters Environment	Recommended solution if you are using Headquarters. Product Data is synchronised from Headquarters, Web orders processed through a selected store
	Store Only Headquarters Environment	Not recommended. Use this if you want to synchronise product data and process web orders through a store which is part of a Headquarters

1.2. I am installing RMSify into a Standard Headquarters Environment and …

The store which will process my web orders is		Define a store to process your web orders through

2. Install Locations

2.1. The machines which will run the RMSify Software are…

RMSify Sync		If using a Standard Headquarters Environment, this must be at HQ
RMSify Web Orders		This must always be a machine running RMS POS

3. Options and Rules

3.1. What tender type are you going to use for your web sales?

	I have a tender type already which I will use	RMSify Transactions will be processed using an existing RMS tender
	I will let RMSify create a web tender to use	You will create a "Web Tender" using RMSify for use with your web sales

3.2. Do you want Shopify to keep track of your inventory levels?

	Yes	If a product is out of stock on Shopify it will no longer be displayed as available for sale (Recommended)
	No	Products are still available for sale even though Shopify thinks we have none left

3.3. I am installing RMSify into a Standard Headquarters Environment and I want Shopify to track my inventory levels (Above). Please track stock from...

	All Stores	Shopify will track the combined on hand levels across all my RMS stores
	Selected Store	Shopify will only track the on hand level from the selected "Web" store

3.4. I would like Shopify to charge sales taxes for…

	All Items	Shopify will charge sales taxes at the Shopify defined tax rates for all items
	No Items	Shopify will not charge sales taxes for any items
	Sales Tax > 0	Shopify will charge sales tax for any items in RMS which have a sales tax rate greater than 0

3.5. I would like Shopify to …

	Always require a shipping address	Shopify will require a shipping address for all sales (Recommended)
	Not require a shipping address	Shopify will not require a shipping address for all sales

3.6. I would like Shopify to …

	Use RMS Automatic Sale pricing	Shopify will automatically update products that are "On Sale" in RMS with the RMS sale price
	Not use RMS Automatic Sale pricing	Shopify will not reflect sale pricing from RMS

3.7. I use Matrix products and I want to display…

	One product which contains all of my colours/Dimension 1	Shopify will create a single product containing all colours/dimension 1 relating to that product
	One product for each colour/Dimension 1	Shopify will split Matrix products by Dimension 1/colour to show individual products for each

3.8. Customers will access my webstore on the following address…

	http://<yoururl>.myshopify.com	You don't have a custom domain
	http://www.<yourdomain.com>	You have your own domain name and have asked the domain provider to point the CNAME and A records to Shopify (See page 17)
	I will register a domain in Shopify	You can sign up for a new domain name in Shopify

3.9. Customers on my webstore will pay by (You can choose more than one)…

Paypal	Fill in your relevant PayPal details here. You must have a PayPal business account and can accept either Express Payment or Website Payments Pro	
Credit Card Gateway	Fill in the relevant credit card provider details if you have them at this point, otherwise fill them in later for safe keeping. See Appendix B for a list of Credit Card Gateways which can be used with Shopify	
Google Checkout	If you also want to allow customers to use Google Checkout, enter the merchant ID and Key here	

NOTE Please don't write your passwords down

3.10. I will be selling and shipping goods to the following territories and they will pay the listed sales tax…

	Home Country		Tax Rate	
	Rest Of The World		Tax Rate	
	Specified Others		Tax Rate	

Deployment Checklist

Use this checklist to ensure you have covered all the steps necessary during the installation procedure to get your Shopify store integrated with RMS. It's an accompaniment to workthrough the Getting Started section.

Preparation

	I have a domain name	Host Name	
		URL	
		Username/Email	
		Password	

Step 1. Shopify Signup

	I have signed up for a Shopify Account (http://www.shopify.com/?ref=rtl)	Store URL	
		Username/Email	
		Password	

Step 2. Shopify Setup

	I have completed the Shopify Setup wizard		Product Screen – Should be skipped
			Design Screen – You have selected a template or are happy to continue with the default
			Content – You have created some custom content pages/blogs or skipped this for now
			Payment – You have chosen, signed up for, and configured your payment gateway (Question 3.7)
			Taxes – You have set up your regions and tax rates (Question 3.8)
			Shipping – You have set up your shipping and have at least 1 shipping rate defined which is "And upwards"
			Domain – You have assigned your custom domain to your store or registered a domain (Question 3.6)

Step 3. RMSify Download

	I have installed RMSify to my webstore through the App Store		Install button clicked
			Accepted the payment charges
			Downloaded the software

Step 4. RMSify Configuration

	I have installed RMSify on the machine which will run RMSify Sync (Question 2.1)		Installer has been run
			Run the RMSify Sync application through the Start Menu
			HQ Tab (If applicable) has been configured (Questions 1.1, 1.2)
			Shopify API tab is configured and Test Connection established
			Shopify Details are the correct details for my webstore
			Web Tender has been selected (And created if necessary)
			Product field mappings have been defined – The defaults are usually fine
			Customer field mappings are defined – The defaults are usually fine
			Rules have been defined (Questions 3.2, 3.3, 3.4, 3.5)
			Finish has been clicked – This saves the settings

	I have installed RMSify on the machine which will process Orders (Question 2.1)		(Headquarters Environments only) I have processed all outstanding worksheets
			Installer has been run
			Run the RMSify Web Orders application through the Start Menu
			Restart the RMS POS Application
			Custom POS Buttons on the right hand side of the POS screen are enabled
			RMSify Web Orders button is on the right hand side and when pressed it launches the application

Step 5: Data Preparation

	I have checked the "Item Available On Website" for products I want to sell through Shopify	RMSify only syncs products which have that check box enabled
	I have added a web friendly description to my RMS Extended Description	By default, RMSify will synchronise Extended Description with the RMSify Description. (Or whatever field you have mapped as your extended description)
	I have added pictures to my RMS products	Pictures are crucial for a web store. All your web products should have pictures
	I have added Tags to my RMS data	Tags can be used for Smart Collections in Shopify and other useful features. Be sure to add them when you can
	I have Synchronised my RMS data to RMSify and its populating as it should	Running the sync the first time will show you how your data will appear in your webstore

Step 6. Webstore Customisation

	I have modified at least the custom logo in my theme, and other settings which I deemed appropriate	If you are using an off the shelf theme, make sure you modify it to look how you want it
	OR I have a custom designed theme which is installed and I am happy with	If you have hired a theme designer for you
	I have defined my collections	Collections are used mainly for navigation
	The navigation of my website is implemented	Make sure your users can navigate around your website accordingly
	I have implemented a Privacy Policy	Shopify can help you out with these. They allow your customers to shop with peace of mind http://www.shopify.com/blog/6362560-shopify-now-offers-ecommerce-policy-templates
	I have implemented a Returns and Refunds Policy	
	I have implemented a Terms and Conditions page	
	I have implemented a Contact Form page	Customers need to know you are readily available. It's also useful to have your phone number and email on your homepage
	I have implemented an About Us page	Gives your store a more personal feel and lets customers know about your physical store presence.

Step 7. Webstore Launch

	All products which I want to appear on the web, are on the web	
	All products have at least one picture assigned	Products without pictures won't sell
	Shipping, Destinations and Taxes are all correctly configured	Have at least 1 Shipping rate which accounts for "And Up". You are responsible for adhering to local legislations
	The Test Flag for my Gateway is disabled	If your chosen payment gateway supports it
	I have completed a test checkout with a live money transaction	You need to make sure your payment gateway and checkout process are working effectively
	I have selected an appropriate payment plan for my Shopify Store	This is normally done at signup, but you may need to choose one if your still in your 30 day trial period
	I have removed the storefront password	In Shopify Admin, go to preferences > General preferences
	I have repointed my domain (if necessary)	In Shopify Admin, go to preferences> DNS & Domains

Congratulations, your webstore is launched! Now you need to start focussing on making the most of your store, through SEO (Search Engine Optimisation) and other marketing efforts. Help for this is readily available on the web, or you can hire a Shopify Expert to help you out. http://experts.shopify.com/