

WORDPRESS QUOTE AND PRE-PROJECT REQUIREMENTS

In order to make efficient use of everyone's time, the following is provided to help facilitate the gathering of information required prior to a project or task being moved into our development queue. The list below will be helpful whether we're developing new functionality, updating, troubleshooting or migrating data. This is by no means a complete list but covers some of the more common task requests that we encounter. Please provide the information on an as needed basis.

A few notes about Credentials

Credentials provided should be tested and working. (Though sometimes some websites may require VPN or Proxy access for the offshore team) Please note for credentials that require 2 factor authentication, we will need to coordinate to gain access to the account. When possible, please set up a developer account for access. You may use support@whitelabeliq.com for this purpose.

Overview

Desired completion date _____

Build type _____

Page builder _____

Current site platform _____

Is there a business requirement or functional requirement document? _____

Is there an SOW already written? _____

Is there a sitemap? If yes, please provide _____

Is there a mood board or style guide? _____

Credentials

Desired completion date _____

Stakeholders

Your WLIQ project manager _____

Your client's company name _____

Agency project manager or point of contact _____

Agency project team members _____

External consultants _____

Other stakeholders _____

Third party vendors _____

Project Details

Is there a functional or business document?

List actionable task items _____

Provide a scope of the project

Provide a list of deliverables

Specifications that WLIQ should be aware of _____

Sitemap

Image sitemap of site build

Confirm final page count of the project _____

Site Type

Type of site to be worked on

Shopify

Big Commerce

WIX

WordPress

HubSpot

Custom Coded

Other (Specify)

Design

Design files provided along with their linked assets and fonts

Prototype provided

Branding guidelines provided

Design direction if WLIQ is responsible for design. This can come in the form of rough wireframes or content outlines

Forms

If a form requires support, provide location of form within the website _____

If the form is implemented via an Iframe, provide access to the third party form provider

URL of third party form provider _____

Credentials to third part form provider (as needed) _____

Form details

Form name _____

Form location _____

Form notification recipients _____

Form fields (indicate required fields) _____

If form submission data is to be submitted to third party apps like HubSpot, MailChimp, etc, provide credentials for access to those platforms _____

Email

If using third party sender provide account credentials _____

Email server _____

Email server credentials _____

Email username and password within the domain for testing _____

Plugins And Extensions

Confirm list of plugins or extensions to be used in development or testing _____

If the plugins/extensions require support and the plugin / extension is premium, provide account license information and credentials _____

Google Services

(Maps, Re-Captcha, Analytics, Google Tag Manager ... etc)

Google account credentials _____

Confirm which APIs to be used or being used _____

Google document sharing should be provided to the WLIQ project manager as well as support@whitelabeliq.com _____

Third Party APIS Or Integrations

Confirm third party product to be tested or used _____

Third party product license access _____

Third party product account credentials _____

Required APIs and their documentation _____

Data Migration

If WLIQ is expected to migrate data from one website to another

Provide access to the server where data will be migrated from (control panel or FTP) _____

Provide access to the CMS the data will be migrated from _____

Provide a spreadsheet mapping the current pages to the new pages on the new site _____

Confirm data structure compatibility (what platform are we migrating from?) _____

Confirm page count for data migration _____

Confirm data types for migration

E-Commerce

Categories

Events

Blog articles

Testimonials

User roles and management

Pages

Any custom taxonomies

Products

Customer roles and management

Product reviews

Product categories

Product filters

Customer profiles

Orders

Order histories

Tax rate data

Shipping

Payment gateways and processing

Checkout process

Current Hosting Information

Hosting account credentials _____

FTP/SFTP credentials _____

Cpanel access _____

Domain control credentials _____

CDN access _____

Current Site Admin Access

Admin URL _____

Admin credentials _____

Admin role with appropriate permission _____

New Hosting Information

Hosting account credentials _____

FTP/SFTP credentials _____

Cpanel access _____

Domain control credentials _____

CDN access _____

Wordpress Builder

Confirm use of Page Builder

Beaver builder

Elementor pro

Gutenberg

DIVI builder

WP-Bakery

Other (specify)

Notifications

Confirm list of notifications _____

Collect emails for notifications _____

Performance

Obtain benchmark data from current website (if applicable) _____



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