AD HOC TASK
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

Stakeholders

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 Part 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   ⊘ Checkout process
                              processing

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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