

Company Store Set Up Guide

Now that you understand company stores, and know how to qualify a prospective company store candidate, let's discuss how you go about setting up a store. Your first step will be to determine which of the many potential features this particular store requires. Let's review some of the most commonly required features:

- **Open Store vs. Closed Store** – An open store is available to anyone and does not require a username or password to place orders. This works well in situations where there is a high employee turnover, or when you don't know who the potential buyers will be as is the case with: associations, clubs, sports leagues and referral relationships. A closed store requires the use of usernames and passwords which can provide your store with more control and better reporting. Furthermore, closed stores allow you to provide different levels of permission to different users. In some cases, you may decide to hide some products from one department yet allow them to be seen by another.
- **Product Categories** – Your client will often want to separate the products offered by category. Since our goal is to sell multiple products we should always suggest that the products can be displayed in different categories so as to encourage them to include more product categories, thus creating more sales opportunities for you.
- **Proofing** – Real time proofing of personalized items, such as business cards, is a popular option. When enabled, it allows the buyers to personalize an item then immediately view and approve an online proof.
- **Logos & Imprints** – Most companies have a single logo that is used for all products, but that isn't always the case. We must determine whether all products will be imprinted with the same logo or not. If there are multiple logos we must understand how and when each one is used.
- **Supervisor Approvals** – Your client might allow the orders placed by all buyers to be submitted directly to your office for processing, but many times they will require some or all orders to be approved by a supervisor. This approval feature is very popular in large organizations with multiple locations and multiple layers of management. Although it can become a complicated custom feature, the enabling of order approvals that follow your client's chain of command can sometimes win you the client.

- **Inventory** – If your client is able to commit to order quantities that will satisfy the vendor’s minimum quantity then you will not need to worry about maintaining product inventories. In the event your client wants to place orders less than the vendor’s minimum quantities you will need to review your options for “putting product on the shelf”. There are a number of ways this can be handled, and the store can help you track and report your inventory levels.
- **Reporting** – In some cases a simple order acknowledgement is all the reporting that your client will require. When setting up a store, it is recommended that you offer as few reporting features as possible. Too often the decision maker requests many complicated reports that are costly to design but end up never getting used. If possible, put off the building of custom reports until after the store has been launched.
- **The Check-Out Process** – To complete an order your client needs to “check out” using the “shopping cart”. The information gathered during the check-out process varies depending on the client’s needs. Here are some things to consider:
 - Will the billing information be the same for all orders or does the system need to collect billing information?
 - If the store uses usernames and passwords, could it identify the bill to and ship to information based on the user’s ID?
 - Will the billing always be done on an open account or does the system need to collect credit card information (requires an SSL secure certificate, additional costs)?
 - Will the shipping information be the same for all orders or will it vary and have to be collected at check out?
 - Is there any other information we need to collect upon check out?

Setting up a store with the features you’ve selected is done through two forms designed to maximize customization while keeping the process simple. Using both a store set up form and a product set up form, we can build your company store to your exact specifications:

- **Store Set Up Form** – Each store requires one store set up form. This form helps you to gather the following:
 - Company logo
 - Company colors
 - Store url, if a specific one is desired

- Your contact and billing information
 - Usernames & Passwords; Yes or No?
 - Supervisor approvals required; Yes or No?
 - Product categories
 - Desired launch date
 - Special features / Special instructions
- **Product set up form** – A product set up form must be completed for each and every product that will be displayed in the store. This form will prompt you to provide the following:
- Product name
 - Product image(s)
 - Product number (if required)
 - Product short description
 - Product long description
 - Product category
 - Product type (Print, promo, apparel, etc.)
 - Available colors and sizes (If required)
 - Quantities to be offered
 - Pricing
 - Proofing requirements (if applicable)

Many of your clients/prospects may not have had the opportunity to set up a comprehensive company store. You should communicate the benefits they will realize and be careful not to present them with a long list of features that may only serve to confuse them. Listen carefully to how they order currently and try to identify areas they would like to improve upon. Your ability to create a solution that provides them with more control and better reporting will quickly put you in good favor. Although your client might tell you that “price” is the number one issue, don’t be surprised if you later find that control and reporting are far more important to them.

Don’t be intimidated by the prospect who suggests they already have a company store. In most cases, they are using a “first generation store” that only provides a fraction of the features offered by today’s systems. Most clients using older stores are frustrated with the many limitations those stores have imposed upon them, and they will know exactly what they want from your store.

The installation of a well designed and properly implemented company store can lock your competitors out and provide you with a long term client. We no longer need to fear “large” client relationships. This is your opportunity to become more of a system provider and less of a commodity sales person.

Sales Tools & Setup forms are available at <http://mywebvendor.com>
For more information email us at support@mywebvendor.com