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Magento project estimate guidelines

Purpose of this article by Scandiweb.com

For PM

- This article describes main areas PM has to think when making a quote

- It will help to compose a structured list of questions to source information that make difference in regards to time we have to develop;

- When you have gathered all the info that changes your quote, this article also will help to ask questions about smaller details

- That need to be asked before development start, so it can go smoothly without interruption;

- In result, you will make developers work comfortable as they will know all the details about the project in advance and will not need to stop work and ask you.

For developers

- When you get task from PM, you can check it versus this article-checklist and ask some questions that are unclear to you before starting development;

- Article also will help you to broaden your competence on the way from developer to team leader.
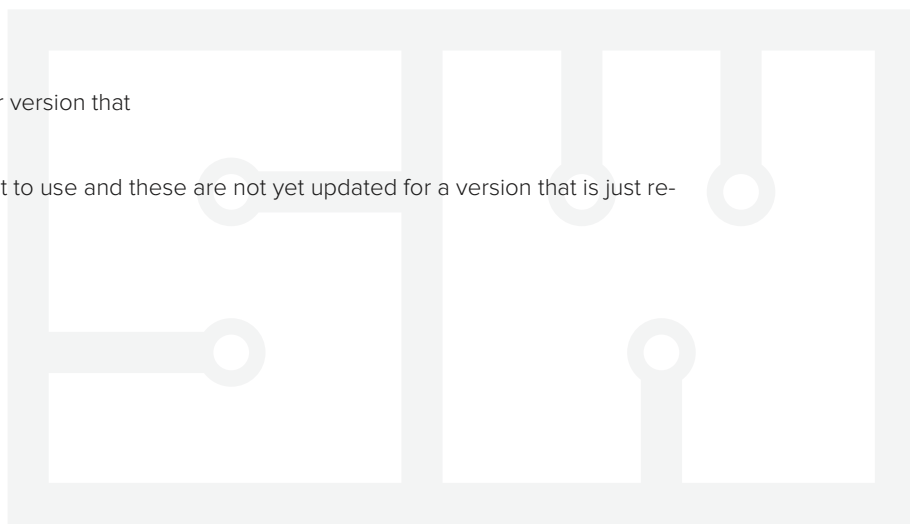
General

① Project version

Offer to make it on latest stable version or other version that
a) customer might prefer
b) there maybe some extensions merchant want to use and these are not yet updated for a version that is just released.

② Fonts

Check if the site has special fonts and ask how client prefers them to be rendered - Cufon or font-face.

Also, check they if we as a company have these fonts and if not - ask client to send, so we can see actual rendering of the pages.

③ Overall site layout versus browser window

- What happens outside of JPG area? Screens can be much wider. Is background color based - should we set it to 100% width?
- Is background pattern based that we can repeat - should we?
- Is there an image in the background?
- What will be outside image area - just white background, color background or?

Try to guess customer's idea or offer several solutions for them to conform.

④ Sitemap consistency

Check that categories mentioned on front page are consistent with what you see on category page. In general, sitemap should be adequate to the site purpose, for example, sell clothes.

Example of site map that is a bit inconsistent:

Junior Brands: http://screencast.com/t/6eXooZtUr and http://screencast.com/t/KrMvd9UoD4

⑤ Designer mistakes

Take into account designer mistakes e.g. category name in the list that is highlighted is not coinciding with the text that appears on top of product list for that category. E.g. Boys shirts and on top of products just Shirts... Another example that in the head of product list designer can write showing 9 products of 23, but display 12 products on page and show 10 pages in pagination.

There is no point to raise these issues in discussion of the project with customer. However, if you want to be 100% safe, you can just list them somewhere in the

end of the message telling that unless client indicates otherwise, these (list of such points) are assumed to be designers mistakes.

Deciding on designs implementation you also have to be aware what browser interface designer was having in mind. For example, Safari has nice drop down style and if project manager is not aware of it, he or she might ask developer to use some customizing tools to make these drop downs look the same in all browsers.

⑥ Scaling of information versus layout consistency

If you see a certain functional block that cusotmer may edit think what happenes if customer adds more units of information that you see in design. E.g. what happens if customer will add 10 slides in slide show, add 50 prod-

ucts on front page, right text about us in 3 paragraphs insteadof one sentence as suggested desiger with "Lorem ipsum", or what happens if horizontal menu will feature 5 items instad of very nicely aligned 3

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like in design? Is design scaling friendly?

Note: sometimes these questions can block the project and it is good just to be aware of that and list it somewhere in your offer telling that this solutions has certain limitation scaling wise. So, if your customer thinks that it is important for them they will raise these questions and if not, you are secured if customer will complain later and ask to re-do something at no cost. You can show e-mail and tell that you mentioned about it before start of the project, so if they want to do it now - then it will be at additional cost.

⑦ Principle of mapping

For each unit of information in the front end e.g, price, special price, tag, popular search queries list, top products, Log in link, newsletter block you have to understand how this information is being generated from Magento back end. That is, is it a price customer inserts in product edit tab, is it standard newsletter block, it is an attribute, this is a table inserted in RTE with custom style applied, and so on.

And if there is a block / text / image that you do not know yet how customer will manage from back end, please try to guess, create hypothesis what for it is there and confirm with client how customer will manage it.

Technical set-up (installation, db, servers, versionning)

① Project set-up

Clarify whether:

- We download clean Magento version OR there is pre-configured Magento version

  - if they have pre-configured where do we get it - by e-mail / download link or from their repository?

  - If from repository, ask necessary credentials to access it

- Do they want periodic commits to their repository or we can develop internally according to our development processes and submit ready work to them when it is ready?

  - If they want periodic commits - get access to repository and type of version control Git/SVN.

  - If they want ready result in the end - ask how they want to get it - we install it on their FTP, we commit to their repository, we send proejct archive with DB. will their developer be working on the project simultaneously

- Will customer work on the project simultaneously e.g. add products, install extensions, etc?

  - If yes, discuss how changes to the data base will be managed? Solution - migration script extension we use internally.

- What is the way developers, if our developer, is integrated into their team work with DB?

  - Shared DB?

  - Each works with local DB instance and updates it with migration scripts?
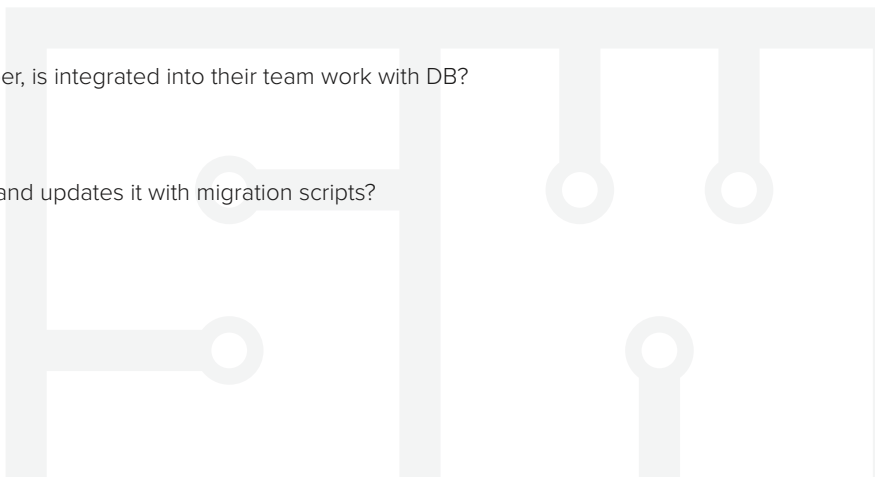
General guidelines - it has to be clear about

a) what is the code base you will start work on? Download latest version from Magento or get some pre-configured package from them?

b) will our development be connected with their system - do we work within our network or commit to their repository?

c) will their developers or client will work on the project? Add new code, tables, products?

d) how progress will be tracked - we can commit and they autodeploy our code or we have to ensure staging server URL for their acceptance testing.

Front page

① Slider module

a) check width - usually designer sends width for 1024px or 1280px, but what happens on 1480px or wider screens? As sometimes designer puts nice background that kind of stretches, but is different color for every slide. Different color is not a problem - they can indicate it and we can stretch it. But if they also have some background.. than it is not likely that they will provide piece of it to repeat it. Example: http://screen-cast.com/t/UE7Hos18ABUR

b) check slider content layout. Sometimes it follows certain template e.g. image in the background and image title and sub-title in the bottom right corner. In other cases each slide has different design. Then, it is important to confirm that slides are prepared as images or if client is advanced RTE user, it can be done in RTE (loading image as a table background and then adding texts on top…It will always have cross-browser issues though).

② Product lists on front page

Sometimes customer wants to publish some products there and call this products New, Most popular, Sale leaders, Promotion, Final sale or anything else. Ask how these list of products will be generated - will it be automatic e.g. products with higher turnover will be there or customer

wants full flexibility over what they want to display under these categories. Usually, they want full flexibility and at Scandiweb we do it with special category e.g. front page products. Else it can be done with an attribute "Show on front page".

③ Visual promotional elements

On Front page customer usually wants to see some "banners" or catchy info messages like Free Delivery For Purchases over 100$, Final Sale till the end of the week! Or visual banner with happy family with customer's product.

Scandiweb.com mission is to provide flexible and scalable solutions for clients, so we have to understand

that customer will need to change these elements and design in a easy way.

In Magento it is usually done via Static Blocks. When offering this solution check how promotions are built - sometimes it is good idea to add custom fields to Static blocks (add new fields to the template file in admin + amend DB) , so that customer can type in URL of pro-

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motion taget page, title, sub-title and in RTE field just add an image. In some cases some image in promotional block is larger than designed static block area -still it can be done with image alignment to the bottom of Static block.

Category page

① Facts about categories in Magento

in BE you can add two images to categories (latest version of Magento)

- You can also add RTE (text, image, flash, …)

- You set display order

- You can set "show in menu", then category will not only appear in left column, but also will be shown in drop down menu (horizontal)

- Scandiweb.com also has Pol Attribute extension that allows adding attributes to categories. It can

be useful if customer wants to mark some

- Categories as special ones and to show them in certain design / color. Or it can be text based input field where customer can add sub-title under

- Category or to add custom text to all products from that category.

- in category set up you can indicate which static block to publish rendering the list of products. E,g static block with promotion of these category products.

Useful about categories

See this video on how we add custom attributes to categories to manage their layout settings, display settings, add colors, positions, etc http://screencast.com/t/GCn77I7AmTm3

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② Stickers/labels on the product

Visual labels that tell NEW, SALE, or just show percentage. Sometimes we make them with custom attribute for product and each attribute value e.g. "new" - corresponds to the image in media folder with .png extension - new.png. Thus, customer can add new values

easily. But it is advisable to ask client to send these labels in advance, so we can set hem up in the project. Other solution is to use extension from Scandiweb. com.

③ Main category and sub-categories

Usually, opening sub-category we display list of assigned products, but clicking on main category several options are available:

- We display list of products assigned to it;

- We display list of products assigned to all sub-

categories (then display order will not work for it);

- We display category images of sub-categories;

- If it is left column, some projects might not show anything on clicking (will not reload the page), but just expand list of sub-categories.

④ Sorting and list/grid display options

Check sorting and list display (grid list) options - do they include standard Magento or something else.

⑥ Long names of products

Check that design will not be broken (nice grid) if product names are too large. If it can be broken suggest several options e.g. a) display long product names on two lines, b) show them on one line, but just hid what is not filling one line e.g. This is long product n (and what is after "n" is simply not visible, but visible for SEO).

⑤ Category promotion block

Usually is displayed above products and can include just an image, image and text, just text for SEO purposes or text overlaying an image. This is usually managed via RTE field in category management. Alternatively, it can be managed by static block linked to that category (in case RTE of category is used for something else in the project).

⑦ Special price

Design for special price. Ask if it is not available if necessary. If design is simple - you can tell that unless you provide design we will make special price like this - describe how.

⑧ Layered navigation

Check whether it is following default Magento, meaning that it works like a set of radio buttons in each section. Sometimes customer has check boxes there assuming that site visitor can select several values. Also, sometimes design has price sliders in layered navigation or this navigation is displayed horizontally instead of vertically. It can be also AJAX based, but then paid extension is necessary.

Product view

① Labels in product view

If you have labels / stickers of NEW, SALE in product list they usually also appear in product view. Ask client if this is the case. If it is then ask client to provide also bigger version of these labels / stickers for product view. In any case, already programm such an option that if there is image in media folder new_big.png that it will be picked up and placed on product view image.

② Image zoom

Usually nobody uses default Magento pop up zoom. It is either overlay with light box or an extension like http://www.magictoolbox.com/magiczoomplus/

③ Related products (or recommended products. or... anything customer might decide)

In Magento there are Up-sells / Cross sells / Related products. Up-sells are meant to sell more expensive product e.g. there is a watch that costs

EUR 5000 and up-sells show options of the same model, but limited edition and tell Upgrade to Luxury! Cross-sells

are from related categories e.g. if you sell iPod you can show also earphones. Related products are usually accessories and have special fucntionaity - checkboxes and option "add all", so you can add with one click lights, speedometers and other accessories if you are buying e.g. a bike.

People sometimes call these products Recommended, Customers who bought this also bought that, etc... So, just offer what on the design will correspond to what in back end. For example, if you see customers who bought this also bought that explain that there is

no such functionality in Magento, maybe there is an extension that tracks this (offer extension), or suggest that customer can assign these products manually via upsells for example.

Sometimes, there are some products customers is offered to buy at checkout (similar like when you go to cash register in supermarket there are sweets and chewing gums), this can be done either via special category that will be listed on checkout / basket or taking related (or other type of associated products) from products added to the cart and displaying them.

④ Check layout consistency versus scaling of published information

Check all visual blocks of products view in respect to what will happen if there will be much much more description text than now, if list of related products will be 10 instead of 3, if photos in photo gallery will be 10 instead of 3, etc.

If you do not see a solution for that - you can just note about it to client without asking too much questions and bringing this as a very important matter because then you can just block project. Just note that in writ-

ing, so client is aware of this and if somebody complains later you can quote that you already warned about it in the very beginning.

However, if you can offer solution e.g. if you see that adding more than 3 related products will break product view layout, you can suggest that we will always display 3 products even if there will be more added (e.g. on random).

⑤ Check if there is static information in product view

Sometimes it can be size guide, delivery and returns information, care instructions, etc. Ask if it is similar for all products or it is dynamic and client should have an opportunity to set it up separately for each product.

If it is static - place it in Static block(s). If it is 100%

dynamic - create attributes for that product, where client can type it in. If it is 50/50 dynamic, so for some products it will be the same you can offer to make an attribute which value will coincide with Static block with information on that product.

⑥ Visual attributes in product view used for configurable products (choose color...)

In some shops, especially clothing shops, you will have designs, where color selection in product view is done via color swatch instead of default text drop down. Scandiweb solution for this is to create an attribute

color and for each value of it store color_name.jpg in a folder in media library accessible for client. Then client will be also able to add new colors later. Another solution is to use extension from Scandiweb.com.

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⑦ General mapping of variables seen in design to Magento back end

For example, if you see that under product title there is some subtitle e.g. title is Men Polo Ralf Lauren and subtitle "Signature collection of Anger

Cabrera". Question is whether it is category name that we repeat under product or is it something that customer wants to edit for every product?

⑧ Product layouts to be included in the project

Some shops might need only simple product layout, other shops have also configurable products layout and usually it is seen in the designs.

Important is to bear in mind that Magento product view has many variations apart from it e.g. bundled products, grouped products that will not display correctly unless we style them. Also, such features as creation of attribute within product edit dialogue will not be seen in front end unless it is explicitly styled by developer (in some cases, this functionality can not be visible in

front end because developers have disabled it). So, it isgood idea to a) evaluate project scope thinking on how many product view templates you will have to style and possibly rise the price, if it is more than simple and configurable, b) to inform customer without calling too much attention to it, that in the price mentioned you include the following product view templates and list them. Later, if client will want something more you will have the right to ask extra pay for it since it was delimited before.

Checkout

① Payment methods

Magento has easy to set up payment gateways - there are usually few for each country e.g. iDeal for Netherlands, eWay for Australie, ePay/Quickpay for Denmark, DIBS for Norway and Scandinavia, FirstData/Authorize. net can be set worldwide. These payment gateways are included in the base price. Please, add to your quote question about payment gateways with note that it can be specified later and it will not affect the price if

it is a ready extension provided on Magento Connect that takes few hours to set up and configure.

If customer provides designs for check out, check how payment is handled there. We have experience when designer designed credit cards data to be inserted directly on the site, but customer never implemented it - it was with redirect to payment provider (see next section on more info about it).

② Note on how Magento / eCommerce systems in general handle payment

Note - this is not "must be" case, but an option that can be a guidelines for your disucssion with client. So, you know how it might be in order to ask relevant questions and map it versus their actual process.

a) when order is confirmed by the customer there are two possible scenarios

Customer clicks Check out and is redirected to payment page that has an URL different than the shop e.g. secure.firstdata.com or securepayment.dibs.com - this page usuallyhas minimal styling applied because it is located on payment provider server and we have limited options how to influence its desing (usually, you can ask for standard template from them, cusotmize HTML,

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add images and send it back. But logo normally is set to be shop's logo). Customer is redirected for security purposes, so that credit card data is entered on the form on secure (https) server. Otherwise, shop owner has to certify its server, purchase SSL certificate and comply with some norms for storing of credit card data on server.

Customer can enter credit card details directly in check out. That means that shop owner has special arrangement and it is better to ask who is responsible for server compatibility with such norms. Normally, we

are limiting ourselves from this telling that we can set up ready shop with "Pay by check" payment option, so that shop owner can test all the purchase flow, but we are not quoting some special payment options set up. Of course, in order to provide full service we better offer full functionality implementation, but then you can split the project in development phase and quote for it and tell that you will quote for payment method set up later when customer will provide more information / answer your questions about it.

b) payment processing company checks that customer has valid card, has enough funds on their account and makes reservation of funds. Reservation means that funds are still on the customer account and will be released unless payment processing company will send capture request.

c) order is generated inside Magento back end and shop owner is informed about it. Following actions can take form of i) cancelling order and then Magento will inform payment processing company that reserved funds have to be released or ii) order confirmation and consequent ready for shipping status after which Magento sends request to payment processing company to capture reserved funds. In some countries norms vary on when funds can be captured, but in Denmark for example it can be captured only when order status is changed to "ready for shipment".

③ Payment methods - expanded

Sometimes it takes some weeks after project is ready to set up on-line payment because it is necessary to communicate server IP to payment processing company, store owner should get a merchant number, they should get a special account for that or any other security measures that might be necessary.

Sometimes, if client is pushed to go LIVE on certain date, it is necessary to set up payment processing simultaneously with development of the project itself. What is necessary for this

• ask client to register final domain name where project will be hosted, if it is not available yet

• purchase hosting / server solution and set FTP/DB access to us

• as soon as you get access to the server set up there blank Magento theme with customer logo, customer details (address, company name, legal address, phone), one product added, correct VAT for that country, display of card logos that are accepted, and terms and conditions (returns) pub-

lished. Usually, this is necessary, so that payment provider can approve them. Of course, if it is just PayPal with redirect, it is not necessary.

• connect domain to the server (indicate server ns zones in domain set up)

• guide client in obtaining merchant number, other credentials necessary for this specific payment gateway

• ask client to provide that real server IP, URL to payment processing company for authorization

If client already has something running on that domain check with developers that you can check wheter extension allows to send requests from domain.com/development_older/ set up Magento installation there and once approved publish it in the main domain.

You can also set up payment method in testi mode, but check - does payment extension allow testing from any domain (it means that after testing customer still will have to provide their payment processor with real URL real orders will be made).

④ Delivery methods

Please, add to your quote question about delivery methods with note that configuration of standard Magento shipment methods is included in the price as well as installation of ready extension provided on Magento Connect that takes few hours to set up.

Note: some extensions are very complex, so even understadning of what they do might take a day and then to understand how to configure them to match end client situation might take days.. to find out their situation, to understand how to configure each client use case in the extension, and finally test it.

So, it is better to describe it before and tell that if our help will be necessary client can ask for it later and it will be billed on hourly basis.

⑤ Quick overview of default Magento shipping methods

a) free shipment can be applied after purchase exceeds certain amount of money and can be limited to certain countries.

b) flat rate per cart total or per item can be applied to certain country. Free shipping overrides flat rate, if purchase exceeds certain money amount.

c) table rates are set up either for weight and distance or for price and distance. Distance can be discriminated by country, region, city and ZIP.

So, within one city prices can be different for different ZIPs. And of course, delivery price can be different for the same ZIP, but for different weight of purchase or different amount of purchase (e.g. the more you buy the cheaper is delivery).

⑥ Custom checkout logic

Sometimes project scope includes some changes to the default One Page Checkout flow. Typical examples of custom logic are:

a) if there is only one option is available for Shipping method, then skip "Choose shipping method" step;

b) show only payment method A if user has selected shipping method B;

c) allow shipping method only for selected countries;

d) make one of shipping/payment methods selected by default.

Implementation of certain checkout logic changes requires testing of all use cases not only from coding perspective, but also from consumers view. Will custom checkout logic actually make sense in all use cases?

For example if you are requested to add payment method "Pay at store" and add shipping method "Pickup at store", then it would make sense to display this payment method only if "Pickup at store" is selected as shipping method.

Another example when checkout logic change is when you see that shipping method used in checkout is limited to certain area. For example, Post.nl shipping service delivers orders to its collection points all over the Netherlands. When user selects this shipping method, he can choose a collection point on a Google Map. However, this shipping method does not offer any collection of outside of the Netherlands. Here custom checkout logic is required to hide the shipping method if shipping country/zip code is not in the Netherlands.

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Customer portal

Nothing special can be said about customer portal except that if developers are following Scandiweb.com developers guidelines than they can substantially save time on styling.

The only thing, pay attention to what tabs should be active in the project as customer portal has many options like recurring profiles, downloadable goods, etc. but usually we deactivate them if not needed for the project.

Default ones that we are using are Account Dashboard, Account Information, Address Book, My Orders. Newsletter subscription - is activated if

we have newsletter. My Wishlist - if we have wishlist. My Tags - if we have tags functionality enabled and the same with My Product Reviews.

Other tabs have to be researched as we never have implemented Billing agreements, recurring profiles or my applications.

Miscellaneous

① Transactional e-mails

These are e-mails that are automatically generated and sent by Magento on certain actions have taken place. For example, once you subscribed, once your order status is changed. It is seldom when we change design of transactional e-mails and in the scope of base price, we only place customer shop logo instead of Magento logo.

② Favicon

If you did not get it from customer with PSDs you can ask to send it before development is completed. Because after development is completed all additions are billable.

Notes

① Rich Text Editor (RTE), What You See Is What You Get (WYSIWYG)

For final client it is quite difficult to achieve good looking results managing things in RTE unless these are very simple and with pre-defined Styles by us (meaning that we can add custom Style to RTE Style drop down that will align / format customer's content according to design). Therefore, it is better to check whether customer's content of certain block follows certain template/pattern and create separate fields for different types of content e.g. title, promo text, main text, URL, text on the button. It can be also achieved via RTE with custom styles: button, title, sub-title, text, and URL can be assigned to the button text, but there are much more chances for customer to mess up things in RTE than in the pre-defined template with distinct fields. Of course, template decreases flexibility - customer will be able either follow that template or order more changes from us.

If you decide that pre-defined fields are good solution, make sure you confirm it with customer, accentuating that you suggest this to make theircustomer life more easy. But they have to confirm that solution because it increases their comfort, but decreases full flexibility.

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② Where and how to locate images that need to be accessed by customer or PM

Ask developers to locate images that customer might want to edit (or PM) in media folder accessible via RTE. E.g. put labels / stickers as NEW / SALE in media folder / stickers accessible via RTE.

③ Newsletter

Magento default newsletter is e-mail only. If you see there is a name field, we have an extension for that. Check shop. scandiweb.com

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