T-REX Audit (Health Check) Checklist

This checklist can be used to check all of the basic settings in your store. It does not go into advanced features.

Contents

T-REX > Business Settings

http://support.trexecom.com/solution/articles/19000071762-business-settings

Is the Business Setting configured?	Yes	No	Notes
Paypal Email			If you would like to accept PayPal payments, enter your PayPal email address here
Stripe Live Publishable Key			If you would like to accept Stripe payments, you need to have this configured.
Stripe Live Secret Key			If you would like to accept Stripe payments, you need to have this configured.
Stripe Test Publishable Key			If you would like to *TEST* Stripe payments, you need to have this configured.
Stripe Test Secret Key			If you would like to *TEST* Stripe payments, you need to have this configured.
Stripe Account Type			If your website is live and you are accepting Stripe payments, set this to "Live Stripe." If you are testing your site, set tot "Test Stripe"
Lockerstock API Key			If you are selling items fulfilled by PrintTech, this must be configured. This setting allows your order to be sent to PrintTech.
Mailchimp API Key			Optional. If you want to integrate with MailChimp email, you must have this configured.
Mailchimp List ID			Optional. If you want to integrate with MailChimp email, you must have this configured.
Cart Countries			Temporarily Recommended to set to USA only. Once the T-Rex shipping settings have been enhanced to allow different ship rates to be configured by country, then additional card countries can be selected.
Cart States			Default = Select All
Notifications Email			Set to your email address. Choose an email address that you or an assistant will check regularly.

Business Name			Business name or website domain (yourstore.com)
Select Global Default Cart Page			Select your 1-step or 2-step checkout page that you will usually use. You can override this setting in each campaign or funnel campaign. The 1-step checkout has the "Continue Shopping" button. The 2-step checkout works nicely with funnels.
Select Global Default Thank You Page			Select the Thank You page that you will usually use. You can override this setting in each campaign or funnel campaign.
Select Global Default Cart Logo			Select the Logo that you want to appear on the checkout page.
Select Global Default Campaign Logo			Select the logo that you want to appear on campaigns by default. You can override this setting in each campaign or funnel campaign. You might do this if you were doing a fundraiser and wanted a campaign to have a church, school or non-profit logo instead of your store logo.
Default Daily Supplier Email			Recommended to put your own email address here. You should have a supplier email selected for each product so this would only be used if someone orders something that does not have a supplier selected. In this case you would be notified, you could forward the order to the correct supplier and you would be alerted that you need to add a supplier to your product listing
Daily Email CC To			Same as above, but maybe you want a copy to go to a partner or assistant.
Select Currency			
Confirmation email Template			Select the confirmation email that you want to be sent to your customers after a purchase by default. You can override this setting in each campaign or funnel campaign.
Stripe Error Message			Default = "Something has gone wrong. Please try again!"
Page View Tracking Code			If you decide to market using Facebook ads, you would want to have this configured.
Conversion Pixel Tracking Code			If you decide to market using Facebook ads, you would want to have this configured.
Cart Tracking Code			If you decide to market using Facebook ads, you would want to have this configured.
Favicon			This is the little icon that appears on the browser tab. It is recommended to have one.
Default Continue Shopping Button Link			Most stores don't have this configured. Leave blank to default to home page.
Default Shipping Discount			Leave un-selected if you would like to configure shipping discount by campaign. Select something here if you would like a site-wide default shipping discount.
Default Size Dropdown Text			Default = "Click Here To Select Size"

T-REX > Checkout Pages

http://support.trexecom.com/support/solutions/articles/19000071403-configure-the-checkout-cart-pages

You should have two checkout pages configured; a 1 Step Checkout and a 2 Step Checkout. One of these will be selected in Business Settings as the default checkout page.

1 Step Checkout page	Yes	No	Notes
Is the page named "**1 Step Checkout**" or something similar?			If your page is named "checkout" or "cart" it is recommended to change it to something that better identifies the page. You do not need to update the permalink.
Is "Select Checkout Type" set to "**Default**"?			This should be set to "Default" for the 1 Step Checkout
Is a logo uploaded?			It is recommended to have a logo to help with branding your site.
Do you have a Custom Menu set?			We recommend you setup a custom menu, however this is optional.
Menu 1 = "Tracking"			Default: To receive a tracking number please email us at support@yourdomain.com. Please include your order number. We respond within 3 hours during business days.
Menu 2 = "Money Back Guarantee" (Is something configured?)			It is recommended to have this configured but is optional. Some sample text is available in the knowledge base.
Menu 3 = "Contact Us"			If you have any questions or concerns please email us at support@yourdomain.com We pride ourselves on a prompt response, but please allow up to a maximum of 24 hours for our support team to respond.
Step 1 button options			Default is not configured. This is optional
Step 2 button options			Default is not configured. This is optional
Select Thank You Page (is something selected?)			This is very important! If you want the checkout process to function properly you MUST have a Thank You page selected.
Privacy Policy Content (Is something configured?)			It is recommended to have this configured but is optional.

2 Step Checkout page	Yes	No	Notes
Is the page named "**2 Step Checkout**" or something similar?			If your page is named "checkout" or "cart" it is recommended to change it to something that better identifies the page. You do not need to update the permalink.
Is "Select Checkout Type" set to "**2 Step Checkout**"?			This should be set to "2 Step Checkout" for the 2 Step Checkout
Is a logo uploaded?			It is recommended to have a logo to help with branding your site.
Do you have a Custom Menu set?			We recommend you setup a custom menu, however this is optional.
Menu 1 = "Tracking"			Default:

			To receive a tracking number please email us at support@yourdomain.com. Please include your order number. We respond within 3 hours during business days.
Menu 2 = "Money Back Guarantee" (Is something configured?)			It is recommended to have this configured but is optional. Some sample text is available in the knowledge base.
Menu 3 = "Contact Us"			If you have any questions or concerns please email us at support@yourdomain.com We pride ourselves on a prompt response, but please allow up to a maximum of 24 hours for our support team to respond.
Step 1 button options			Default is not configured. This is optional
Step 2 button options			Default is not configured. This is optional
Select Thank You Page (is something selected?)			This is very important! If you want the checkout process to function properly you MUST have a Thank You page selected.
Privacy Policy Content (Is something configured?)			It is recommended to have this configured but is optional.

T-REX > Confirmation Email Templates

http://support.trexecom.com/solution/articles/19000070987-confirmation-email-templates

Is this configured correctly?	Yes	No	Notes
Do you have at least 1 confirmation email template			You need at least 1 confirmation email template
Subject Line: "Your Order is Being Processed"			That is the default wording. You may change it as you like. You should have something configured in the content as well. Use "Hello, %name%" as the intro. The end should contain "%product_details%"
Is your support email address included?			Make sure if an email address is included in the text, that it's your email address and it's correct.
Is your support phone number included?			Make sure if a phone number is included in the text, that it's your phone number and it's correct. If there is a default phone number listed and it doesn't belong to you, remove it or change it.

T-REX > Notifier

http://support.trexecom.com/solution/articles/19000008813-create-notifier

There is a Campaign-specific Notifier and a Site-Wide Notifier. The notifier is the pop-up at the bottom of the screen which says something like, "Another fan in Smallville bought Cool Mom Tee"

Is this configured correctly?	Yes	No	Notes
Do you have a site wide notifier configured			This is optional

Is this configured correctly?			
If you have a site-wide notifier configured, did you exclude test orders?			
Do you have one or more campaign-specific notifiers configured?			This is optional

T-REX > Taxes
http://support.trexecom.com/solution/articles/19000072839-what-sales-tax-should-i-charge-

Is this configured correctly?	Yes	No	Notes
Do you have taxes configured			This is up to you to determine to configure or not, and how to configure. We recommend you obtain tax advice from a qualified expert. We cannot offer advice on these settings.

T-REX > Thanks
http://support.trexecom.com/solution/articles/19000070880-customize-your-thank-you-page-s-

Is this configured correctly?	Yes	No	Notes
Do you have one or more Thanks pages configured?			You must have a Thanks page configured and set as default in Business Settings and/or selected on each campaign. This page is needed for the checkout process to work correctly.
Do you have your logo included in the Thank You Text			This is optional, and recommended. You can use the "Add Media" button to add an image to this section, including your logo.
Do you have an explanation of what the customer will see on their PayPal or Credit Card receipt?			This is important to communicate to the customers to help avoid chargebacks if they don't recognize the charge.
Redirect URL (do you have this configured?)			Recommended to your website home page in most cases.
Delay Time (is it set?)			This is the number of seconds that the Thanks page will be displayed before redirecting to the URL you configured. This happens after the purchase/checkout is complete.

Misc. Items

Is this configured correctly?	Yes	No	Notes
Do you have a knife displayed on your home page?			If you do, we recommend you don't run Facebook ads or Facebook may shut your ads down. If you aren't running FB ads, no worries then.
Do all footer links work?			
Do all menu links work?			
Did you review all pricing?			You should review all pricing including shipping charged for all items in your store. This is your business and pricing should be set based on your marketing strategy and to allow for profit if desired.

Divi > Theme Options: Did you upload a favicon?			It is recommended you do.
Divi > Theme Options: Did you upload a logo?			It is recommended you do.
Is WordPress updated?			It is recommended to keep WordPress updated
Is the DiviTheme updated?			It is recommended to keep the Divi Theme updated
Do all images on your website look correct?			Make sure you don't have broken images or anything that looks funny on your site.
If you have a phone number in your header, is it correct?			
Make sure your Privacy Policy looks good			
Make sure your Terms of Use look good			
If you have any other links on your website, make sure they have been tested			
Does the logo size look ok on the ome page?			