

Opening for Business

This guide reviews the steps necessary to complete the Open for Business process.

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- Step 1: Research and Planning (Recommended)
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Introduction

This document will outline the steps necessary to complete the Open for Business process. The Open for Business process is defined as the steps required to complete the Open for Business Form linked from the Store Manager. Several recommended steps will also appear that are not required to submit the form but should be completed by merchants before opening for business.

You can [print this document](#) and check off items as you complete them, or you can follow along while reading online. Items outlined in this document will be marked in two ways:

- **Required**—items marked required must be completed in order to complete the Open for Business Form.
- **Recommended**—items marked recommended are not required to complete the Open for Business Form but will aid the merchant in being more successful upon opening.

Not all aspects of building, managing and promoting your store are covered in this document. To get a quick overview of getting started with your store, consult the online [Getting Started Overview](#). To get in-depth information on building, managing and promoting your store, read the Getting Started Guide that you can download the [Getting Started Guide](#) in PDF format.

Step 1: Research and Planning (Recommended)

Research competitors—Search on Yahoo! using keywords that you believe would be associated with your products. What types of sites appear in the results? Are any of these sites competitors? What are these sites doing right? What are they doing wrong? What type of language is used on each site? Would similar language appeal to your target buyers? How are the products priced? Do they offer bulk discounts, free shipping, or other pricing strategies that would work for your business?

The more of these questions you can answer before you begin building, the more likely it is that your business will get off to a good start.

Plan before you build—Architects create blueprints for buildings before construction begins. This allows for planning and scheduling of resources, and the ability to foresee and avoid most large problems before they happen. Building your store should be no different.

Create a site map that shows how products will be grouped on your site and what information will appear on each page. If you are only starting with a few products then you may not need a detailed plan. If your store will contain hundreds of products, then you should know which products will appear on which section pages and how those section pages will appear in your navigation bar (link menu) and on your home page.

Select a building tool—The method you choose to build your store depends on many factors:

- your level of familiarity with computers and web site design: [beginner, intermediate or advanced](#)
- the number of products you wish to sell
- your knowledge of HTML or an HTML authoring program
- the degree to which you want control over your site design including special features, content, or advanced scripting

The following document outlines the advantages and disadvantages of various publishing methods such as Store Editor or Web Hosting (Yahoo! Site-Builder, Dreamweaver, or FrontPage)

Choosing a Building Tool

<http://help.yahoo.com/help/us/store/store-38.html>

This document also appears as Chapter 3 in the Getting Started Guide.

Gather content or images—Collect any brochures, flyers, or other product and company information you may already have. Use this information as the basis of product descriptions or information pages in your store. If you do not have such info, the Store Editor contains default content for your information and privacy policy pages, but you will need to customize this text to fit your store. You can also take inspiration (but not copy outright) from the information you may have seen on competitor sites, but the best content will be that which does not sound generic but matches the voice of all the content on your site.

Likewise, you will need to gather product images (if any) for products in your store. If you have a catalog for your items, you may already have product images. If this is the case, you should edit the product images to optimize them for appearing on the Web.

Step 2: Build your Store (Required)

You do not need to have a fully completed site to open for business but if you plan to accept credit cards online, you do need to have a site that appears complete and includes one or more items. The reason—Merchant Account providers (if you do not already have a merchant bank account) will review your site to ensure that your store is a legitimate business. Many merchant account providers will not approve a site which is under construction but you will need to ask them when applying how much of your site needs to be completed.

If you do not wish to sign up for a merchant account just yet, you can open your store with a PayPal account. With this option, your store will accept PayPal as the sole payment option (though PayPal account holders can fund their transactions using their PayPal balance, credit cards, debit cards, or even a bank account). There is no site review process to qualify for a PayPal account so this option is perfect for merchants that want to open their store with only a few products and then build up their product line after opening for business. [Learn more about accepting PayPal.](#)

In order to open for business, your site also needs to contain a few specific pages (info and privacy policy) as agreed to in the terms of service.

Create your item/product pages—Your store should have at least a few products before you opening. Your choice of building tool depends on many factors:

- the number of products you wish to sell
- your knowledge of HTML or an HTML authoring program
- the degree to which you want control over your site design

The following document outlines the advantages and disadvantages of various publishing methods such as Store Editor or Web Hosting (Yahoo! SiteBuilder, Dreamweaver, or FrontPage)

[Publishing Options](#)

<http://help.yahoo.com/help/us/store/store-38.html>

To create item pages, consult the following help:

- [Store Editor](#)
- [Yahoo! SiteBuilder](#)—consult the help within the application or review chapters 11-12 of the Getting Started Guide.
- [Dreamweaver](#)—consult the help within the application accessible from the Yahoo! menu after downloading the Merchant Solutions extension for Dreamweaver or review chapter 13 of the Getting Started Guide.
- FrontPage/Other HTML tool—consult the help within the application or review chapters 14-15 of the Getting Started Guide.

Create your Info and Privacy Policy pages—Using the publishing method you selected after reading the Publishing Options document listed above you must:

- [create an Info page](#)
- [create a Privacy Policy page](#)

For more information, consult Chapter 9 of the Getting Started Guide.

Yahoo! can also offer you the time-savings, expertise and convenience of our [Designer Directory](#) – a group of professional web designers and developers who have expertise in designing and building Yahoo! Merchant Solutions sites.

These Yahoo!-approved designers and developers will help you to:

- **Save time**—Frees you from spending time on designing, building and testing a site so you can get to doing what you do best – managing your business.
- **Start selling more quickly**—Use the experts in the Designer Directory to get your store built quickly so customers can start buying from you without delay.
- **Express yourself online** (be unique)—The Designer Directory experts will work with you to build your site the way you want it....
- **Have more confidence**—Be confident that your site will look professional, etc. The Designer Directory professionals have built over 1500 Yahoo! stores.
- **Help gain more customers**—Leverage knowledge to help rank higher in search engines so your prospective customers can find you.

Step 3: Set up a Payment Processing Option (Required)

Yahoo! Merchant Solutions requires all merchants to have a merchant bank account or a PayPal account in order to open for business. If you wish to process credit cards online through your store, you will need a merchant account that is compatible with FDMS, the payment processor (gateway) for Yahoo!. If you have a merchant account that is not compatible with FDMS Nashville platform, you can still process credit cards offline but not through the Order Manager in your store. You have the following options:

- Sign up for a Paymentech merchant account, the Yahoo! preferred provider. If approved, your store will automatically be set up to process credit cards online. [Learn more.](#)
- Sign up for or use an existing merchant account. You have two choices depending on whether or not you wish to process credit cards online (within Yahoo!) or offline (outside of Yahoo!).
 - **To process credit cards online**—Set up an FDMS Nashville compatible merchant account. You will need to supply the merchant bank name, your merchant account number, your MID and TID, and then select the credit cards for which your merchant account has been set up to process.
[Learn more about setting up an existing merchant account.](#)
 - **To process credit cards offline**—Select the option to process transactions offline and enter your merchant bank name, your merchant bank phone number, and your merchant identification number (MID).
[Learn more about processing orders offline.](#)
- Sign up for or set up an existing PayPal Business or Premier account. Merchants can choose to accept and process transactions only through PayPal to start and then add a merchant account for accepting credit card payments at a later date. [Learn more.](#)

Confused about merchant accounts and payment processing? [Read the Order Processing Guide](#) to learn about applying for or setting up an existing merchant account.

Step 4: Publish Order Settings (Required)

In order to open for business, you must publish your order settings. However, before you publish your order settings you may wish to complete several recommended steps such as setting up which payment methods you accept and which shipping methods are available outlined below.

[Set up your Order Form Settings \(Recommended\)](#)—Enter information and customize settings for your order form pages.

For detailed information, consult Chapter 16 of the Getting Started Guide—Customizing your Order Form

You can choose to customize your checkout pages using Checkout Manager, currently in beta release. Checkout Manager allows you to choose multiple checkout flows (single page, shipping and billing combined, order review shown or hidden) as well as customizing the visual design with custom headers, side bar and footer regions including using CSS to customize most elements of your checkout pages. [Learn more about Checkout Manager.](#)

Set up [Shipping](#) and [Tax](#) settings (Recommended)—set up shipping methods and rates as well as tax settings. You can also set up your store to inform buyers that shipping and tax will be added later to the total. Note: This may lead to increased chargebacks from customers if customers are surprised by additional shipping charges.

For detailed information, consult Chapter 21 in the Getting Started Guide—Defining Shipping Methods and Rates

[Set up payment methods \(Recommended\)](#)—set up your merchant account to process credit cards online or set up your checkout pages to offer PayPal (only available to merchants using Checkout Manager).

Notes:

- If you sign up for a Paymentech account within the Store Manager, this step will be completed for you automatically once you have been accepted.
- If you have another merchant account provider, you will need to select which forms of payment you accept.
- If you use PayPal, you will need to go to the Checkout Manager and select where to display the PayPal checkout logo in your pages.

Publish Your Order Settings (Required)

To publish your order settings, from the Store Manager click the "Publish Order Settings" link appearing at the bottom of the Order Settings column.

When the "Publish Order Settings" link appears with a red asterisk following the link, then your Order settings have changes that are not published.

Step 5: Complete the Open for Business Form (Required)

When you began the Open for Business process, the Store Manager displayed a link to the Open for Business form (see [figure 1](#)).

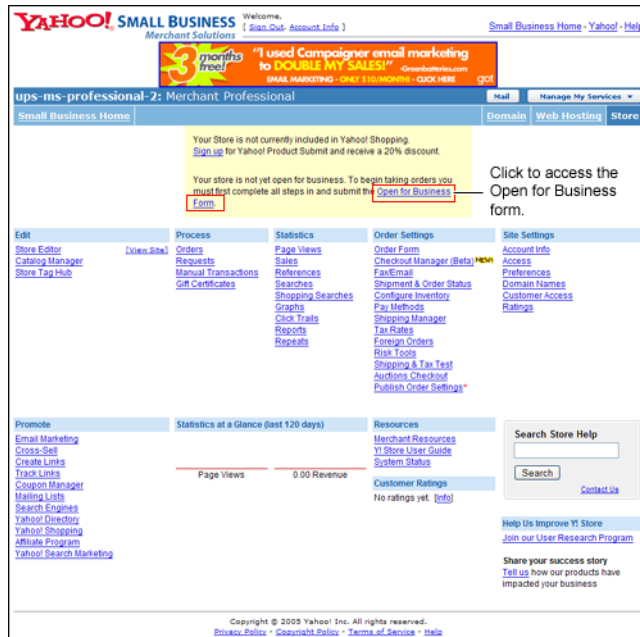


Figure 1: Store Manager with Open for Business Form link highlighted

Click the link to the Open for Business Form to complete the last required step in opening for business. The Open for Business Form appears (see [figure 2](#)).

The screenshot shows the 'Open for Business Form' on the Yahoo! Small Business website. The page has a blue header with the Yahoo! logo and navigation links. A message at the top states: 'Your Store is not yet open for business. To open your store for business you are required to complete the form below. You can [download](#) the Open For Business checklist or [read a guide](#).' The form is divided into four steps:

- Step 1: Research and Planning (Recommended)**
 - ☒ Research your competitors. Plan your site before you begin building. Select a building tool with which to build. Gather content and images to use on your product pages.
- Step 2: Build Your Store (Required)**
 - ☒ Build using Store Editor
 - ☒ Build section and item pages
 - ☒ Build info and privacy policy pages
 - ☒ Switch your domain traffic option ([Learn More](#))
 - ☒ Publish Store Editor
 - ☐ Build using Web Hosting (SiteBuilder or Dreamweaver and Catalog Manager Store Tags)
 - ☐ Build section and item pages
 - ☐ Build info and privacy policy pages
 - ☐ Publish Catalog Manager
- Step 3: Setup Merchant Account (Required)**

In order to open for business, merchants must do at least one of the following:

 - ☐ Set up a Paymentech merchant account, an FDMS-compatible merchant bank account or a PayPal account to process transactions online.
 - ☒ I do not want to process payments online. The following are my merchant bank account information (after you enter and save, the box on right will be checked):

Bank Name:	<input type="text" value="Bank"/>
	<small>(Merchant Bank Name)</small>
Bank Phone Number:	<input type="text" value="555 555 1212"/>
	<small>(555 555 1212)</small>
MID:	<input type="text" value="123456789"/>
	<small>(Merchant Identification Number)</small>
- Step 4: Setup Order Settings**
 - ☒ Set up your Checkout Manager settings and Shipping and Tax rates and publish your order settings when ready.

At the bottom, there is a checkbox for email marketing: ☒ Email me about how I can get FREE list-building tools & special discounts on email marketing. [Learn More about email marketing!](#)

Below this, a note states: 'If you choose to receive more information about receiving 1 month free and special discounts on email marketing, we will share your email address, Yahoo! ID and Store name with [Gds](#). They will only use this information to send you email about this offer.' A link to the [Privacy Policy](#) is provided.

At the bottom of the form are 'Cancel' and 'Save' buttons.

Figure 2: Open for Business Form

To complete the Open for Business Form:

1. Select the checkbox in step 1.
2. Select a building tool option in step 2 and select all checkboxes for the selected option.
3. Select a payment processing option:
 - Select the first option if you will process credit cards online through Paymentech, an FDMS-compatible merchant account, or if using PayPal as a payment processing option.
 - Select the second option if you will process credit card orders offline and enter your merchant bank name, merchant bank phone number and MID (merchant identification number). Contact your merchant account provider if you are unable to find this number.
4. Click the "Save" button to submit the form.

Note: The Merchant account number must be either 12 or 16 digits long. If your number is shorter, add enough leading zeros to make 12 or 16 digits. For example, if your merchant account number is 123456789, then type 000123456789 or 0000000123456789.

Before you can open for business, if you preview your order forms in the Store Manager, you will see a message that your store is not open for business (see [figure 3](#)).

Check Out: **Shipping** Payment Review Confirmation

My-First-Store.com

my-first-store.com is not open for business.
Ordering is allowed for testing purposes only.

[Click here for the info page](#)

Shipping

Shipping Address

First Name: Last Name:

Street Address 1:

Street Address 2:

Your Order

Item Name	SubTotal
2 Example Item Color: Black	159.90
1 Example Item	0.00
Subtotal:	159.90

Order Form Preview

Click the links to the right to preview pages of your shopping basket in the top frame.

This page shows how the form will look, but most of the links or buttons won't work.

Other Forms:

- [Shopping Basket](#)
- [Shipping Form](#)
- [Billing Form](#)
- [Review Order](#)
- [Order Confirmation](#)
- [Express Order](#)
- [Order Status](#)
- [Catalog Request](#)

Other Views:

- [Regular](#)
- [from Yahoo! Shopping](#)

Message appears indicating store not open

Figure 3: Order Form preview showing message

When you have completed the steps in the open for business process including submitting the Open for Business Form, the Order Form will no longer show this message (see [figure 4](#)).

Check Out: **Shipping** Payment Review Confirmation

My-First-Store.com

[Click here for the info page](#)

Shipping

Shipping Address

First Name: Last Name:

Street Address 1:

Street Address 2:

City: State:

Zip Code: Phone:

Your Order

Item Name	SubTotal
2 Example Item Color: Black	159.90
1 Example Item	0.00
Subtotal:	159.90

Order Form Preview

Click the links to the right to preview pages of your shopping basket in the top frame.

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Other Forms:

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- [Order Confirmation](#)
- [Express Order](#)
- [Order Status](#)
- [Catalog Request](#)

Other Views:

- [Regular](#)
- [from Yahoo! Shopping](#)

No message indicating store is open for business.

Figure 4: Order Form preview without message—indicates store is open for business. Note: The same applies if you are creating checkout pages using Checkout Manager. The preview message will appear at the top of your checkout pages when you are not yet open for business.

After you click "Save", you will be taken to a confirmation page and you will see a congratulations message. Click "OK" to return to the Store Manager.

Step 6: Track and Revise (Recommended)

Opening your store for business is merely the first step in an ongoing process of building a successful online store. You need to continually track and improve your store early on to quickly build repeat customers.

Further Resources

[The Getting Started Guide](#) is the best place to get detailed information for getting your store up and running. Chapters cover the various building methods to set up the front end of your store including building with Store Editor, Catalog Manager, Store Tags, Yahoo! SiteBuilder, and Dreamweaver. Other chapters address setting up the backend of your store including order settings, payment methods, and shipping methods and tax. Later chapters outline getting statistics to track various data in your store, setting up inventory management, and retrieving orders for processing.

[Merchant Newsletter](#)—monthly subscription email offers feature updates, tips, and news you can use for building your business.

[Help](#)—The Help section, accessible from links in the Store Manager and Store Editor, contains step by step instructions for tasks and also answers to frequently asked questions. Click any of the links appearing below to open a web browser and go to that link.

Building your store

Store Editor

- [Basic Editing](#)—changing page layout, using variables, rearranging buttons, setting options
- [Advanced Editing](#)—using database uploads, editing templates and RTML

[Catalog Manager](#)

Also view the [Catalog Manager tutorial](#) and chapters 2 and 4 in the [Getting Started Guide](#).

[Store Tags](#)

Also view the [Store Tags tutorial](#) and chapter 10 in the [Getting Started Guide](#).

[Yahoo SiteBuilder](#)

View the help within the application and also chapters 11-12 in the [Getting Started Guide](#).

[Dreamweaver](#)

View the help available within the application after downloading and installing the Merchant Solutions extension by selecting the help command from the Yahoo! menu. Also view chapter 13 in the [Getting Started Guide](#).

Managing your store

Store Manager

- [Order Settings](#)—customizing your order forms, payment methods, and inventory
- [Checkout Manager](#)—customizing your checkout pages
- [Site Settings](#)—setting preferences, granting access to store, password protection
- [Statistics](#)—understanding, viewing and troubleshooting statistics



[Orders](#)—viewing orders, setting up online payment processing, finding a merchant account provider

- [Processing credit card orders](#)—processing, modifying and submitting batches for credit card orders, fraud reduction
- [Retrieving orders](#)—emailing, faxing, printing and exporting orders, advanced order options

[Shipping](#)—setting up shipping methods, rates and options

[Risk Tools](#)—using AVS and CVV settings

Promoting your Store

Promote

- [Promotional Tools—Search engines, mailing lists, coupons and more](#)
- [Yahoo! Shopping, Yahoo! Directory, Yahoo! Yellow Pages and more](#)
- [Yahoo! Search Marketing Tags and Yahoo! Stores](#)

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