

Your website. All the details together.

A printable companion to your online setup checklist.

Write what you know now and keep this workbook with your project documents. Leave gaps or write "not sure" where you need help. You do not need to finish it before enquiring. Review your answers before choosing what to share with DigiThat.

Business / project: _____

Prepared by: _____ Date: _____

IMPORTANT: Keep the keys safe.

Never write passwords, sign-in codes, API keys, transfer codes, card or bank details, or private customer records in this workbook. Account invitations and secure handover are arranged separately. Keep the completed workbook somewhere private.

How to use it

1. Each section has labelled spaces for your answers. Extra notes can go on the back of the page.
2. Examples are starting points only. Replace [bracketed details] with your own information.
3. This PDF is blank and designed for handwriting. It does not contain or submit any online answers.
4. Prefer typing? Use digithat.com.au/client-checklist/ and review, copy, save or print your answers there.

Inside: people and approvals; hosting; domains; email; public details; brand and content; pages and features; integrations; launch; handover.

1. People and decisions

Who we work with, and who approves the finished website.

Business / project: _____ Updated: _____

Business identity

Trading name, legal business name and ABN/ACN where relevant. Tell us which name should appear publicly.

Example: Trading name: [your trading name].

Project contact

Your main contact, role, email and phone; a backup contact if useful. These are for the project, not automatically for publication.

Example: Main contact: [name and role].

Final approval

Who can approve the design, wording, scope, costs and launch? Include other people who need to review it.

Example: [Name], the business owner, gives final approval.

Timing and priorities

Target launch date, events or deadlines, top customer actions, agreed scope and anything that must stay working.

Example: We would like to launch before [date or event].

Anything else to discuss? (Continue on the back if needed.)

2. Current website and hosting

A website host, a domain registrar and an email provider may be three different companies.

Business / project: _____ Updated: _____

Existing website

Current website address, any additional domains or subdomains, and the platform or website builder used.

Example: Website: [your website address].

Website hosting

Hosting company, plan if known, account owner, renewal date and who currently manages the website. Do not cancel it yet.

Example: Host: [company].

Existing developer

Agency or developer contact, handover arrangements, notice period, contract restrictions and ownership of the content and code.

Example: Current developer: [name or agency].

Backup and useful pages

Where a current backup is held, important page addresses, downloads, forms and features that must be retained.

Example: Our [host/developer] holds the backup.

Anything else to discuss? (Continue on the back if needed.)

3. Domain ownership and DNS

Keep your domain in an account owned by your business.

Business / project: _____ Updated: _____

Domain registrar

Company the domain is registered with, business account owner, renewal date, auto-renew status and working recovery contact.

Example: Registrar: [company].

DNS provider

Who manages the domain's DNS records, such as Cloudflare or your registrar? Not sure is fine; we can help identify it.

Example: Our DNS is managed by [provider or person].

Other domain services

List subdomains and services using the domain: shop, portal, booking, newsletter, file services or verification records.

Example: Other services using our domain: [booking service, shop or portal].

Approved access

Identify who can invite DigiThat to the relevant accounts with suitable access. Arrange access securely; never enter passwords or transfer codes here.

Example: [Name and role] can arrange invitations for [accounts].

Anything else to discuss? (Continue on the back if needed.)

4. Email that must keep working

Moving your website does not automatically mean moving your email.

Business / project: _____ Updated: _____

Domain email addresses

List addresses using your domain, including hello@, accounts@ and personal mailboxes, plus aliases, forwarding addresses and shared inboxes.

Example: Domain mailboxes: [list email addresses].

Email provider

Google Workspace, Microsoft 365, the web host or another provider; who administers it and pays for it?

Example: Email provider: [Google Workspace, Microsoft 365 or other].

Website messages

Who should receive each enquiry, booking or order? Include reply-to addresses, backup recipients and any customer acknowledgement requirements.

Example: General enquiries should go to [email].

Other email senders

Newsletter, CRM, invoicing, booking and other systems sending from your domain. Their authentication records need to be preserved.

Example: Our [newsletter provider], [booking provider] and [invoicing provider] send email using our domain.

Email continuity

Confirm any planned mailbox migration separately. Before launch we record existing mail settings and test sending, receiving and website notifications.

Example: We want to keep our existing email service.

Anything else to discuss? (Continue on the back if needed.)

5. Details for the public website

Clearly mark what customers should see and what must stay private.

Business / project: _____ Updated: _____

Public contact details

Exact phone numbers and email addresses to display, including emergency or after-hours contact where relevant.

Example: Public phone: [number].

Locations and service areas

Public street address, map location, parking/access directions, areas served and any postal address. Tell us if a home address must not be published.

Example: We serve [suburbs or regions].

Opening hours

Normal hours, appointment-only times, public-holiday arrangements and expected response times you can realistically meet.

Example: Monday to Friday: [hours].

Profiles and credentials

Social links, Google Business Profile, relevant licences, memberships and business identifiers you want displayed. Confirm accuracy and permission.

Example: Social profiles: [public links].

Anything else to discuss? (Continue on the back if needed.)

6. Brand, photography and permissions

Use material you own or have permission to publish.

Business / project: _____ Updated: _____

Brand files

Original logo files (SVG or vector preferred), brand colours, fonts and any existing style guide.

Example: We have [logo file types] and use [brand colours].

Photography and video

Good-quality originals, captions, names where needed, preferred crops and permission to use identifiable people, locations and commissioned work.

Example: We have photos of [team, work or premises].

Words and proof

Services, products, team bios, your story, project examples and testimonials with permission. Flag anything outdated or needing copywriting.

Example: We can supply service information, team details and our business story.

Claims and offers

Confirm prices, inclusions, availability, guarantees, qualifications and other factual claims. Mark unconfirmed details for review.

Example: Offers or prices to show: [details].

Anything else to discuss? (Continue on the back if needed.)

7. Pages and customer journeys

Build around the actions your customers need to take.

Business / project: _____ Updated: _____

Page list

Agreed pages, navigation labels, downloads, frequently asked questions and calls to action.

Example: Pages: Home, About, Services, Our Work and Contact.

Feature choices

Booking, galleries, forms, search, shop, newsletter, themes or animation. Use the website-options library to show what you have in mind.

Example: We would like a project gallery, a clear enquiry form and an easy-to-use mobile menu.

Enquiry and booking rules

Information to collect, available services/staff/locations, opening times, booking duration, cancellation rules and what happens after submission.

Example: Collect the customer's name, email, service needed and general location.

Shop requirements, if needed

Products, variants, stock, taxes, shipping, returns, payment provider and who fulfils orders. Payment account setup stays with the account owner.

Example: Products: [range].

Anything else to discuss? (Continue on the back if needed.)

8. Connected systems and measurement

Keep useful connections working without collecting unnecessary information.

Business / project: _____ Updated: _____

Existing integrations

Booking, CRM, email marketing, payments, maps, chat, reviews, accounting and any systems the site connects to.

Example: Connect our [booking/CRM/newsletter system] so that [purpose].

Business-owned accounts

Account owner and invitation process for each service. Send invitations securely; do not add API keys, passwords or payment details to these notes.

Example: [Name or role] owns or manages [service accounts] for the business and can arrange invitations.

Search and reporting

Google Search Console, analytics and advertising accounts if used; important pages, existing redirects and meaningful success measures.

Example: We use [analytics or search tools, if known].

Privacy and accessibility needs

Approved privacy/cookie wording and relevant customer terms; consent and data retention requirements; language or accessibility needs to include in scope.

Example: Policies to review: [privacy, cookies and customer terms].

Anything else to discuss? (Continue on the back if needed.)

9. Review and launch

There is a final approval before the new site replaces the old one.

Business / project: _____ Updated: _____

Content approval

Confirm public details, wording, images, offers and required policies are accurate and approved for publication.

Example: [Name] will review the public contact details, services, prices and claims.

Customer journey testing

Test forms, destinations, bookings, payments where included, phone links and important customer actions on mobile and desktop.

Example: [Name] will test the enquiry form on phone and desktop.

Technical launch plan

DigiThat prepares redirects, backup, recovery plan, HTTPS, indexing and a DNS change plan that preserves email and other services.

Example: Please preserve our email and [other services].

Launch permission

Agree the launch window, who gives the go-ahead, who is available if needed and which old services can be cancelled after successful migration.

Example: [Name and role] will give written launch approval separately.

Anything else to discuss? (Continue on the back if needed.)

10. Handover and ongoing care

Know who owns what, who can update it and what happens next.

Business / project: _____ Updated: _____

Ownership and billing

Confirm business ownership of domain and service accounts, ongoing hosting/email/subscription costs and renewal responsibility.

Example: Our business should own the domain and service accounts.

Updates and training

Who edits content, whether an admin editing system is in scope, the training needed and how future changes are requested.

Example: We would like to update [services, team details or projects] ourselves, and ask DigiThat to handle larger changes.

Maintenance and support

Agreed backup, updates, monitoring, support period, response arrangements and work that would be quoted separately.

Example: We would like to discuss ongoing backups, updates and support.

Final handover

Receive the agreed files and documentation, confirm access, and remove temporary permissions when no longer needed.

Example: [Name or role] will receive the files, documentation and training.

Anything else to discuss? (Continue on the back if needed.)