CIRCLE

Offboarding Clients

SQUARESPACE 201 — PART III

MARCH 2018

“I love the ability to handoff quickly and completely to my clients. It’s so easy.”

RACHEL KROHN, ELK STREET DESIGN

OFFBOARDING CLIENTS

A successful project culminates in a smooth handoff of website management and ownership to your client. We want you to execute this critical transition flawlessly.

This guide provides advice on topics including site management, billing, domains, block configurations and Squarespace mobile app recommendations. In addition, we've included a downloadable client handoff guide, *A Guide to Your Website*, that you can pass along to your clients. It highlights Knowledge Base resources that will give them the confidence to manage their new website.

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Inviting contributors

In many cases, your client will want multiple people to have access to their new website. Help them understand the differences between permission levels, and teach them how to send invitations to each contributor.

Transferring ownership

Unless you have specifically agreed otherwise, we recommend that your client take over as the website's primary owner. If your client takes over as the website's primary owner they should either remove you completely or keep you on as a contributor. Here's a guide on how to transfer ownership.

Plan and subscription period

Squarespace offers a range of products and plans and this guide can help frame a conversation with your client about which will best fit their needs. As part of that conversation, you may want to highlight these subscriber-friendly policies:

- Annual billing plans are offered at a discount to monthly plans
- Annual billing plans come with a free custom domain for one year
- Annual billing plans can be canceled at any time and Squarespace will refund subscription fees that have already been paid on a pro rata basis
- Subscribers can upgrade or downgrade between plans at any time

Note: If your client is a resident of the European Union, you'll need to discuss VAT with them.

Payments

Squarespace sites become publicly accessible as soon as they are upgraded from trial to paid subscriptions, so payment information should be submitted only when your client is ready for their new website to go live. Unless you have specifically agreed to pay the subscription fees, we recommend that your client pay using their own credit card.

Site migration best practices

If your client's new website is replacing an older site, consider helping them implement site migration best practices. Also, it's a good idea to help your client understand that, even with these best practices, search performance will fall immediately after the site migration, but should recover in time.

Finally, we recommend that you make your client aware of the SEO tools and features built into their Squarespace website.

Domains and domain mapping

Your client can purchase a custom domain from Squarespace, transfer a domain they already own, or connect a domain hosted with a third-party provider. Let your clients know that regardless of who provides their domain, it can take up to 72 hours from the time a custom domain is correctly connected to a website to when their website will be accessible at the custom domain.

Squarespace domains

Clients on annual billing plans are eligible for one free custom domain for the first year of service. Custom domains are not free for subscribers on monthly billing plans, but can be purchased directly from Squarespace. Learn more about claiming and purchasing Squarespace domains here.

Third-party domains

Many clients will already have domains from third-party providers, which they can either transfer or connect to Squarespace. While this is an element of the website development process that happens partially outside of Squarespace, it's one where you can be a useful resource for your client.

We recommend your clients transfer their domain to Squarespace, since this lets them manage all aspects of their account in one place. Before transferring, you should check or have your client confirm that their domain meets all of our transfer requirements.

If your client's domain isn't eligible for transfer, or if they prefer not to transfer it, they can keep the domain hosted with their current domain provider and connect it to their site instead. Our Help site has a guide with general instructions, and another set of guides with provider-specific instructions. If your client hasn't logged into their domain account in a long time and isn't familiar with managing it, consider factoring this extra troubleshooting time into your pricing.

Other settings

Consider providing guidance to your clients on setting up components of their websites that require their login or other confidential information.

Some common examples:

- Form Blocks: email address, Mailchimp, Google Drive, and Google reCaptcha
- Special Blocks: OpenTable, Zola, and Acuity
- Third party connections for Commerce: Stripe, Paypal, Xero, or ShipStation
- Social Accounts
- Google Analytics

Style settings

We think it's great to share screenshots of the Style Editor for each page of the website as part of the handoff process. You can also download and save the style tweaks in a JSON file with your own records, which is a feature only available to Circle members.This will make it easy to roll style tweaks back to the ones you created if your client experiments with other styles or resets their website to the template defaults.

Category and tag management

If you have configured a block (such as a Summary Block or an Archive Block) to filter content by Category or Tag (or other criteria) then it's a great idea to show your client how to apply tags and help them develop an initial content taxonomy.

Squarespace mobile apps

Squarespace has a range of mobile apps that will help your client manage and monitor their new website.

Commerce app

This app lets your client manage their Squarespace store on the go. They can use the app to scan shipping labels, fulfill orders, manage product inventory, and contact customers.

Learn more here.

Blog app

This app gives your client tools for writing, editing, and managing blog posts on the go.

Learn more here.

Analytics app

Your client can use this app to view and track site traffic, see the most popular content, and track how visitors find their website.

Learn more here.

Portfolio app (iOS only)

Syncs with Gallery Pages on your client's Squarespace website, allowing them to take and display their work on the go.

Learn more here.

Once your project is complete, you can let your client know that they will be supported by Squarespace through the Customer Care team and the extensive Knowledge Base.

We’ve created a client handoff guide, *A Guide to Your Website*, that you can share with your clients. It covers basic management and provides direct links to the most useful help articles in our Help site.

A SPECIAL THANK YOU TO:

Eva Goicochea, Benjamin Manley, Lauren Hooker, Caroline Kelso, Faith Watson, Teresa Rosche, Seth Daggett, Deirdre Brunton, Michael Wickett, Kyle Dutka, Tom Collver, Dylan Seeger, Tom Locke, Neil Chandratreya, Jason Barone, Andrew Keese, Delia Porter, Jenni Schwartz, Sasha Kill, Justin Gilman, Rachel Krohn, and Tiffany Hawkins.

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