

If you wanted to start tomorrow, here's the short list. To rebuild your website the right way, we mostly need three things: **copies of your data** (your forklift listings and your parts catalog), **read-only logins** so we can see how things are set up, and **a contact person for each system** so we can ask the vendor directly when needed. Below, everything is broken out by system in plain English. Nothing here is urgent or all-or-nothing — see the note at the bottom.

Each item lists: **What we need** · **Why** · **How / where to get it** · **Who to ask**. Check them off as you gather them.

The 60-second version

- **Forklift listings:** an export file + a read-only login to your inventory dashboard (DealerCarSearch / Trader).
- **Parts catalog:** an export file + a login to your online parts store (and we'll get the master data from your back-office system via Alex's team).
- **Logins to run the project:** your website (WordPress), your domain control, Google Analytics, and your Google Business listing.
- **Your brand:** logo files and real photos (shop, team, trucks, jobs).
- **One go-to person per system** so we know who to ask.



Your forklift listings (Inventory)

The machines you have for sale — runs on DealerCarSearch, and possibly Trader Interactive too.

Plain English: "Inventory" here = the actual forklifts listed for sale on your site (new and used). Today those listings are fed in by an outside vendor. We just need a copy of that list and a way to look at it — we don't change anything on their end.

□ 1. A full export of your forklift inventory (a spreadsheet)

WHAT WE NEED One file (a spreadsheet / CSV) with **every forklift** and all its details: make, model, year, hours, price, specs, description, stock number, and the **web links to each unit's photos**.

WHY This is the raw data that builds every forklift page on the new site. With it, the new site can recreate all your listings automatically instead of anyone re-typing them.

HOW / WHERE From your dealer dashboard's inventory or reports area — look for an **Export** or **Download CSV** button. If you don't see one, the vendor can generate it for you in a quick call.

WHO TO ASK **DealerCarSearch support:** [888-263-7201](tel:888-263-7201) (this is the system we can see drawing your current listings). If your account is set up through **Trader Interactive / TraderTraxx**, their dealer help line is [1-877-920-5442](tel:1-877-920-5442).

□ 2. A read-only login to your inventory dashboard

WHAT WE NEED A view-only login (or you sharing your screen with us once) to your inventory management dashboard.

WHY So we can see exactly how your listings are structured — the fields, the photo setup, how many units — and match the new site to it. View-only means we can look but not change anything.

HOW / WHERE Inventory dashboard is at dealers.traderinteractive.com (TraderTraxx) and/or your DealerCarSearch dealer login. Add us as a user, or do a quick screen-share.

WHO TO ASK Whoever on your team manages the website listings today; or the vendor support numbers above to add a user.

□ 3. The "live feed" link, if your vendor offers one (for auto-updating)

WHAT WE NEED Confirmation of whether your inventory vendor can give us a **live feed** — and if so, the feed link plus any login it needs.

WHY A live feed lets the new site **update itself automatically** as you add or sell units, so listings never go stale and nobody re-types anything. If there's no feed, we simply use periodic exports instead — still works, just less hands-off.

HOW / WHERE Ask the vendor: "Do you offer an inventory data feed or API we can pull from for our website?" (An **API** is just a hands-off way for two systems to share data automatically.)

WHO TO ASK DealerCarSearch support [888-263-7201](tel:888-263-7201) / Trader dealer line [1-877-920-5442](tel:1-877-920-5442).

Confirm with you: We can see **DealerCarSearch** drawing your current listings, and a link to **Trader Interactive** on the site. We want to confirm which one is the "system of record" for your website inventory so we ask the right vendor. Quick answer from you saves a step.

B

Your online parts store

The shop at liftpartsservice.theonlinecatalog.com — runs on a platform called RocCommerce.

Plain English: This is your B2B parts store — a separate website (run by an outside company) that shows your parts and takes orders. We need a copy of what's in it, a way to see it, and confirmation of what it actually does.

1. A login to the store admin (read-only is fine)

WHAT WE NEED An admin or view-only login to your parts store's back end.

WHY So we can see how the catalog is organized, how products display, and how it's themed — which tells us whether we re-skin the existing store to match the new site or rebuild it.

HOW / WHERE The store's admin panel (the back end of `liftpartsservice.theonlinecatalog.com`). Your RocCommerce account rep can add us as a user.

WHO TO ASK Your RocCommerce / theonlinecatalog account rep, or whoever manages the parts store on your side.

2. A product / catalog export

WHAT WE NEED A file of the catalog: **part number (SKU), description, category, price, what machine it fits (fitment), and image links.**

WHY It tells us how big the catalog is (a few hundred parts vs. tens of thousands), which is the single biggest factor in how we build the parts side.

HOW / WHERE An export from the store admin, or your rep can pull it. The master copy actually lives in your back-office system — see Section C (Alex's team handles that one).

WHO TO ASK RocCommerce rep, or your back-office/IT admin (Section C).

3. Confirm: does the store actually take orders, or is it just lookup?

WHAT WE NEED A yes/no: do customers **add to cart and check out / pay** on the store, or do they just **browse and look up parts** and then call/email to order?

WHY A real checkout store and a lookup catalog are built very differently. This decides the whole approach for the parts pages.

HOW / WHERE You'll know from how your customers use it day to day; we'll also confirm by looking once we have the login above.

WHO TO ASK You / your parts team.



Where your parts data really lives (your back-office system)

Infor ERP — the master record behind the parts store. Routed through Alex's team.

Plain English: An **ERP** is your back-office "brain" — the master record of your parts, prices, stock counts, customers and orders. Yours is made by a company called **Infor**. Your parts store pulls its data *from* here, so this is the real source of truth for parts.

1. The master parts/pricing/inventory export + how the store stays in sync

- WHAT WE NEED** The master catalog data out of Infor (parts, prices, stock), and an understanding of **how the store currently syncs to it** (live connection vs. scheduled updates).
- WHY** This is the true source for the parts catalog and the key to keeping the new site's parts pages accurate and self-updating.
- HOW / WHERE** Infor systems share data through a standard connection (Infor's "ION" gateway / API). Your Infor/IT admin or Infor partner can produce the export and explain the sync. **Heads-up:** this is the back-office lane — **Alex's team coordinates it**, so you don't have to manage this one directly.
- WHO TO ASK** Your **Infor / IT administrator** (or your Infor reseller). Tell us who that is and we'll loop them in with Alex. **The only thing we need from you here is the name of that person.**



Access we need to run the rebuild

The accounts that let us build, launch, and safely roll back — with nothing of yours breaking.

Plain English: These are the keys to the existing website and a few connected accounts. Read-only wherever possible — we look and copy, we don't change your live site until you say go.

1. WordPress admin (read-only)

WHAT WE NEED A login to your current website's admin (WordPress).

WHY To pull your existing text and images so we keep the good stuff and don't lose anything in the rebuild.

HOW / WHERE Usually `liftpartsservice.com/wp-admin`. Add us as a user (an "Editor" role is enough).

WHO TO ASK Whoever manages the website today, or your current web host/developer.

2. Domain / DNS control (who manages liftpartsservice.com)

WHAT WE NEED To know **who controls your domain name** (where it's registered and managed), and access when it's time to go live.

WHY Launch day and the safety "instant rollback" both happen here. We don't touch it until cutover — we just need to know who holds the keys. (We never touch your email settings.)

HOW / WHERE Tell us where the domain is registered (GoDaddy, Network Solutions, etc.) and who has that login.

WHO TO ASK You / your IT person / whoever set up the website originally.

3. Google Analytics + Google Tag Manager

WHAT WE NEED Access to your Google Analytics (GA4) and Google Tag Manager, if you have them.

WHY So we keep your visitor history and tracking intact, and can measure whether the new site is winning more leads.

HOW / WHERE Add our email as a user in each. If you're not sure you have these, we'll set them up.

WHO TO ASK You / whoever did your past marketing.

4. Google Business Profile (your Google Maps listing)

WHAT WE NEED Manager access to your Google Business Profile (the listing that shows on Google Maps and in local search).

WHY It's a top driver of "forklift service near me" calls — we'll optimize it alongside the site.

HOW / WHERE From business.google.com, add our email as a manager.

WHO TO ASK Whoever currently manages your Google listing.

5. Brand assets (logo + real photos)

WHAT WE NEED Your **logo** (the original/high-res file if you have it) and **real photos**: your shop, your team, your trucks, jobs in progress.

WHY Real photos of a third-generation family business beat stock images every time — that's your trust advantage. We'll lead with your legacy story.

HOW / WHERE Drop them in a shared folder, or text them over — whatever's easiest.

WHO TO ASK You / your team.

6. One point-of-contact per system

WHAT WE NEED The name + best contact for the person who handles each system: website, inventory vendor, parts store, and Infor/IT.

WHY So when we have a question we go straight to the right person instead of bouncing around — saves you from being the middleman.

HOW / WHERE Just a short list: "Website → ___, Inventory → ___, Parts store → ___, Infor/IT → ___."

WHO TO ASK You.

You don't need all of this to get started. Hand us whatever you have now — even just the logins and a logo — and we'll start building with what's in hand while the rest comes together. The exports unlock the inventory and parts pages, but the marketing rebuild (home, about, service, contact) can begin immediately. Send pieces as you get them; there's no all-or-nothing deadline here.

