

Portal Prodigy Site Configuration Planning Form

Client Name _____

URL: _____

Ask the Experts Required Yes No

Describe Needs: _____

Automated Notification System Required Yes No

Describe Needs: _____

Billing and Collections Management Required Yes No

Describe Needs: _____

Broadcaster Required Yes No

Describe Needs: _____

Bulk Data Import and Export Required Yes No

Describe Needs: _____

Contact Management & Tickler Notes Required Yes No

Describe Needs: _____

Contacts Feature Required Yes No

Describe Needs: _____

Customer Relationship Management (CRM) Required Yes No

Describe Needs: _____

Directories Required Yes No

Describe Needs: _____

Discussions Forums Required Yes No

Describe Needs: _____

Document Library Required Yes No

Describe Needs: _____

Donations Required Yes No

Describe Needs: _____

Event and Class Registration Required Yes No

Describe Needs: _____

Events Manager Required Yes No

Describe Needs: _____

Exchanges Required Yes No

Describe Needs: _____

Feature Integrated Automated Notification System Required Yes No

Describe Needs: _____

Feature Integrated Order Tracking & Management Required Yes No

Describe Needs: _____

Fulfillment Required Yes No

Describe Needs: _____

Fully Managed Hosting Required Yes No

Describe Needs: _____

Help Desk & Call Center Management Required Yes No

Describe Needs: _____

Home Page Required Yes No

Describe Needs: _____

Inventory Management Required Yes No

Describe Needs: _____

Invoicing Required Yes No

Describe Needs: _____

Job Posting and Applications Required Yes No

Describe Needs: _____

Legislative and Regulatory Calls to Action Required Yes No

Describe Needs: _____

Maintenance and Service Contracts Required Yes No

Describe Needs: _____

Membership Billing Required Yes No

Describe Needs: _____

Membership Registration and Management Required Yes No

Describe Needs: _____

Menus Required Yes No

Describe Needs: _____

News Required Yes No

Describe Needs: _____

Online Product Catalog Required Yes No

Describe Needs: _____

Order Management and Fulfillment Required Yes No

Describe Needs: _____

Payment Authorization & Processing Required Yes No

Describe Needs: _____

Payments Required Yes No

Describe Needs: _____

Promotion Codes Required Yes No

Describe Needs: _____

Promotion Management & Processing Required Yes No

Describe Needs: _____

Public Relations Feature Required Yes No

Describe Needs: _____

Publication Manager Required Yes No

Describe Needs: _____

Recruit New Members Online Required Yes No

Describe Needs: _____

Remote Management, Task Tracking and Scheduler Required Yes No

Describe Needs: _____

Search Engine Optimization Required Yes No

Describe Needs: _____

Security and Access Control Required Yes No

Describe Needs: _____

Site Design and Branding Required Yes No

Describe Needs: _____

Statements Required Yes No

Describe Needs: _____

Subscription Management and Billing Required Yes No

Describe Needs: _____

Surveys, Exams and Interviews Required Yes No

Describe Needs: _____

Time Tracking and Billing Required Yes No

Describe Needs: _____

Transaction Management Required Yes No

Describe Needs: _____
