

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: _____
