

## Portal Prodigy **NONPROFIT** Site Preparation Wish List Form

Client Name \_\_\_\_\_

URL: \_\_\_\_\_

PHONE: \_\_\_\_\_

**Suggestion:** Before answering this questionnaire, visit [www.portalprodigy.com](http://www.portalprodigy.com) and click on



### QUICK TOUR

to view video demonstrations of public and non-public administration functions of your new Portal Prodigy software. This will help you to grasp many of the new possibilities available to your organization.

**Who will be Administrator?** (This person will have total access to all site configuration capabilities, back-ups, all data, and all security areas. I.e. this person will have complete power over your system. Select appropriately.)

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**List security divisions required:** (Example: Employees, volunteers, members.)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Do you wish to collect and manage contact records from your website?**

☐ YES ☐ NO

**Do you wish to allow people to sign up on line?** ☐ YES ☐ NO

If YES, list categories of sign up memberships. (Example: Visitor, volunteer, member.)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Do you wish to broadcast to members via email?** ☐ YES ☐ NO

If YES, attach any standard templates to this form.

**Do you wish to implement Legislative & Regulatory Calls to Action?**

☐ YES ☐ NO

If YES, please submit LRCA contact record in digital format (Excel spreadsheet or CSV file).

**Do you wish to make third party experts available to your website visitors?**

☐ YES ☐ NO

If YES, please submit Expert contact records in digital format (Excel spreadsheet or CSV file).

**Do you wish to make forms, manuals, reports and other types of digital documents available to your website visitors?**

☐ YES    ☐ NO

If YES, list categories of documents. (Example: Reports, Briefs, Internal Memoranda, etc.)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Do you wish to have discussion forums available to your website visitors?**

☐ YES    ☐ NO

If YES, list groups. (Example: Public Forum, Volunteer Forum, Staff Forum.)

1. \_\_\_\_\_ ☐ Public ☐ Private

2. \_\_\_\_\_ ☐ Public ☐ Private

3. \_\_\_\_\_ ☐ Public ☐ Private

**Do you wish to accept donations from visitors to your website?**

☐ YES    ☐ NO

**Do you wish to have directories available to visitors to your website?** (Similar to yahoo people pages or yellow pages)

☐ YES    ☐ NO

**Do you wish to display an event calendar on your website?**    ☐ YES    ☐ NO

**Do you wish to allow online event signup on your website?**    ☐ YES    ☐ NO

**Do you wish to accept payment for events on your website?**    ☐ YES    ☐ NO

**Do you wish to allow your members to sell products or services to each other via an online exchange?**

☐ YES    ☐ NO

**Do you wish to operate a support help desk from your website?**    ☐ YES    ☐ NO

**Do you wish to post jobs, volunteer positions, or similar opportunities on your website?**

☐ YES    ☐ NO

**Do you wish to register and manage memberships and/or subscriptions from your website?**

☐ YES    ☐ NO

**Do you wish to regularly post news and press releases to your website?**

☐ YES    ☐ NO

**Do you wish to broadcast press releases from your website?**

☐ YES    ☐ NO

If YES, please submit Media contact records in digital format (Excel spreadsheet or CSV file).

**Do you wish for individual members to have their own press release template and contact biography available from your website?**

☐ YES    ☐ NO

**Do you wish to assign and manage delegated tasks from your website?**

☐ YES    ☐ NO

**Do you wish to manage sales or member prospecting from your website?**

☐ YES    ☐ NO

**Do you wish to conduct surveys, exams or interviews from your website?**

☐ YES    ☐ NO

**Do you wish to accept payment for anything over the Internet?**    ☐ YES    ☐ NO

If YES, please list items related to payments: (Example: Donations, Event Fees, Membership Dues, etc.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**What form of Payment method(s) do you wish to implement?**

- ☐ Mail in Payment
- ☐ Paypal
- ☐ Credit Card via Merchant Bank
- ☐ Electronic Check

**Do you wish to manage invoices and statements from your website?**

☐ YES    ☐ NO

**Do you wish to sell products from your website?**    ☐ YES    ☐ NO

**If YES answer all following questions. If NO, SKIP questions in red type?**

**Do you wish to display items in an online website catalogue?**    ☐ YES    ☐ NO

**Do you wish to manage inventory from your website?**    ☐ YES    ☐ NO

**Do you wish to manage order fulfilment from your website?**    ☐ YES    ☐ NO

**Do you wish to manage service contracts from your website?**    ☐ YES    ☐ NO

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.