



Full Spectrum TM Questionnaire

General Questions

- 1) Do you currently own a domain name? Yes ___ No ___
If yes, what is domain name? _____
If no, do you plan on purchasing one? Yes ___ No ___
If yes, what will your domain name be? _____
If no, what sub-domain name would you like? _____ (e.g. <http://yourname.fullspectrumcrm.com>)
- 2) Do you need an SSL certificate for encryption of your data? Yes ___ No ___
- 3) Do you have employees that will be using this system? Yes ___ No ___

Accounting Module Questions

- 1) Do you have departments within your company responsible for billing clients? Yes ___ No ___
If yes, please list them (e.g. Sales, Human Resources, etc.): _____
- 2) List your billing categories (e.g. development, hosting): _____
- 3) Do you utilize Quickbooks for your accounting transactions? Yes ___ No ___
If yes, would you like us to provide additional information on Quickbooks integration?
Yes ___ No ___

Please enter any additional notes on your Accounting module needs:

Accounts Module Questions

There are 3 sections that make up an account record:

- Account Information (includes 16 optional fields)

1) Identify which fields you will need:

- | | |
|---|---|
| <input type="checkbox"/> Phone | <input type="checkbox"/> Website |
| <input type="checkbox"/> Fax | <input type="checkbox"/> Ticker Symbol |
| <input type="checkbox"/> Other Phone | <input type="checkbox"/> Member Of (for sub-account creation) |
| <input type="checkbox"/> Email | <input type="checkbox"/> Employees (number of employees) |
| <input type="checkbox"/> Other Email | <input type="checkbox"/> Ownership |
| <input type="checkbox"/> Rating | <input type="checkbox"/> Industry |
| <input type="checkbox"/> SIC Code | <input type="checkbox"/> Type |
| <input type="checkbox"/> Annual Revenue | <input type="checkbox"/> Assigned to (your account manager) |

2) If you are utilizing the "Industry" field, identify up to 30 industry options you want available (e.g. Apparel, Banking, Biotechnology, etc.):

3) If you are utilizing the "Type" field, identify up to 10 options you want available (e.g. Analyst, Competitor, Customer, etc.):

- Address Information (includes 10 optional fields)

Identify which fields you will need:

<input type="checkbox"/> Billing Address	<input type="checkbox"/> Shipping Address
<input type="checkbox"/> Billing City	<input type="checkbox"/> Shipping City
<input type="checkbox"/> Billing State	<input type="checkbox"/> Shipping State
<input type="checkbox"/> Billing Postal Code	<input type="checkbox"/> Shipping Postal Code
<input type="checkbox"/> Billing Country	<input type="checkbox"/> Shipping Country

- Description Information (includes 1 option field): Description

Additional Notes on Accounts Module:

Calendar Module Questions

Please enter any notes on your Calendar module needs:

Contacts Module Questions

There are 4 sections that make up a contact record:

- Contact Information (includes 20 optional fields)

1) Identify which fields you will need:

- | | |
|---|--|
| <input type="checkbox"/> First Name | <input type="checkbox"/> Office Phone |
| <input type="checkbox"/> Mobile | <input type="checkbox"/> Account Name |
| <input type="checkbox"/> Home | <input type="checkbox"/> Lead Source |
| <input type="checkbox"/> Other Phone | <input type="checkbox"/> Title |
| <input type="checkbox"/> Fax | <input type="checkbox"/> Department |
| <input type="checkbox"/> Email | <input type="checkbox"/> Birth Date |
| <input type="checkbox"/> Other Email | <input type="checkbox"/> Reports To |
| <input type="checkbox"/> Assistant | <input type="checkbox"/> Assistant Phone |
| <input type="checkbox"/> Do Not Call | <input type="checkbox"/> Email Opt Out |
| <input type="checkbox"/> Assigned to (your account manager) | <input type="checkbox"/> Invalid Email |

- Address Information (includes 10 optional fields)

1) Identify which fields you will need:

- | | |
|--|--|
| <input type="checkbox"/> Primary Address | <input type="checkbox"/> Other Address |
| <input type="checkbox"/> Primary City | <input type="checkbox"/> Other City |
| <input type="checkbox"/> Primary State | <input type="checkbox"/> Other State |
| <input type="checkbox"/> Primary Postal Code | <input type="checkbox"/> Other Postal Code |
| <input type="checkbox"/> Primary Country | <input type="checkbox"/> Other Country |

- Description Information (includes 1 option field): Description

Please enter any additional notes on your Contacts module needs:

Documents Module Questions

1) Documents module contains 8 optional fields, identify which fields you will need:

- Template
- Document Type
- Category
- Sub Category
- Status
- Expiration Date
- Related Document
- Related Document's Revision
- Description

If you are utilizing the "Industry" field, identify up to 4 options you want available (e.g. Mail Merge, EULA, NDA, etc.):

If you are utilizing the "Category" field, identify up to 9 options you want available (eg. Website Material, Marketing, Knowledge Base, etc.):

If you are utilizing the "Sub Category" field, identify up to 10 options you want available (e.g. Marketing Collateral, Product Brochures, FAQ, etc.):

If you are utilizing the "Status" field, identify up to 6 options you want available (e.g. Active, Draft, Pending, etc.):

Please enter any additional notes on your Documents module needs:

Mobile Module Questions

Please enter any additional notes on your Mobile module needs:

Tickets Module Questions

1) Tickets module contains 5 optional fields, identify which fields you will need:

- | | |
|-------------------------------------|--------------------------------------|
| <input type="checkbox"/> Priority | <input type="checkbox"/> Assigned to |
| <input type="checkbox"/> Status | <input type="checkbox"/> Description |
| <input type="checkbox"/> Resolution | |

If you are utilizing the "Priority" field, identify up to 3 options you want available (e.g. Low, Medium, High, etc.):

If you are utilizing the "Status" field, identify up to 6 options you want available (e.g. New, Assigned, Closed, etc.):

Please enter any additional notes on your Tickets module needs:
