## **Tenderer’s Technical Specifications Conformity Form**

Prospective Bidders are requested to mark with Yes (Y) or No (N) next to each of the below criteria. Kindly note that those marked as ‘Must Have’ are essential.

## Modules

### GENERIC

**The Solution is expected to be behave in a consistent manner across the various functional components, these requirements are for across the entire solution and not part.**

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| --- | --- | --- | --- |
| **Requirements** | **Value** | **Response\*** | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** | **N** |
| Provides tools to allow the company solve and create levels of user access, and able to monitor the performance of the system | Must have |  |  |
| Provides automation capabilities to help improve business processes | Must have |  |  |
| Provides Artificial intelligence capabilities | Nice to have |  |  |
| Provides a scalable solution that handles current and future needs of the organisations’ members | Must have |  |  |
| Supports searchable audit trails for transactions and standing data | Must have |  |  |
| Allows all data in the system to be extracted (exported) to multiple formats (e.g., CSV, XLs), including functionality to filter and sort | Must have |  |  |
| Allows to import the current membership data into the system | Must have |  |  |
| Data input is controlled using drop down lists that present only allowed selections for generic categorised fields | Must have |  |  |
| Allow the control of Document Management, to store, manage and track electronic documents such as forms, surveys etc. | Must have |  |  |
| Supports GDPR requirements with functionality such as data deletion and search functionality | Nice to have |  |  |
| Provides help functionality that allows users be self sufficient | Nice to have |  |  |
| Supports multiple users – to access and update the system concurrently | Must have |  |  |
| Ability to create new controlled fields with customisable input screens | Must have |  |  |
| Ability to access the system from anywhere and anytime from any device (Mac, Windows, Android, iOS) | Must have |  |  |
| Supports responsive and adaptive multi device and compatible with all browsers | Must have |  |  |
| The system must be fully integrated and all transactions are updated in real time, all modules and application are seamlessly integrated for the user. | Must have |  |  |
| Ability to custom report with drill down capabilities | Must have |  |  |
| Able to present the generated report into a dashboard | Must have |  |  |
| Ability to print and export data into any format such as CSV, XLs, Word and PDF | Must have |  |  |
| Support a multi search functionality on all the data fields | Must have |  |  |
| Supports role-based access control | Must have |  |  |
| Ensures that a user profile cannot be logged in more than once at a time | Must have |  |  |
| Keeps logs of all logins and logs out timeout session automatically | Must have |  |
| All transactions and data change are traced, any changes must be traceable | Must have |  |  |
| Supports customised menus for individual users with permissions, the user must see the menus that have only access to | Must have |  |  |
| Supports workflow functionality for approval authorisations | Must have |  |  |
| Able to manage the calendar for multi-users | Must have |  |  |
| Unlimited memberships login | Must have |  |  |
| Ability to give members access to exclusive materials | Must have |  |  |
| Ability to give members to update any changes in the contact information | Must have |  |  |
| Ability to give members to trigger a ticket (a request) | Must have |  |  |
| Ability to check if member is still active to be able to change or create a ticket | Must have |  |  |
| Able to send notification of the tickets created online by the members | Must have |  |  |
| Minimum of 8 users with different roles and permission levels:  Accounts 1 users  CRM Membership full permission 3 users  CRM Membership limited permission 8 users (including the Accounts user) | Must have |  |  |
| Ability to record the active time of the users, active time using the system, meeting time, able to input the call time and as well registering inactive time | Must have |  |  |
| Able to have a report or dashboard showing the time sheet by type and by user activity. | Must have |  |  |
| Ability to have an attachment facility throughout all the modules | Must have |  |  |
| The system must include a replicated database for any disaster recovery requirement (back-up) | Must have |  |  |
| The solution must have the facility to download the data as a back-up on the current local server at any time | Must have |  |  |
| The System must be an on-Cloud solution | Must have |  |  |
| The System provided must include the implementation and support services | Must have |  |  |
| Ability to get access to the support team 8/5 | Must have |  |  |
| The system offering must provide function support and bug fixing services without any extra costs | Must have |  |  |
| The System offering must include the following service packs; implementation; configuration; customisation of form, reports, workflows and dashboards; data import; training for employees prior the implementation | Must have |  |  |
| Any additional custom development must be clearly identified and quoted accordingly and included in the system offering | Must have |  |  |
| Any additional ad hoc integration must be clearly identified and quoted accordingly and included in the system offering | Must have |  |  |
| The system offering must include planned and agreed upgrades done seamlessly and free of charge. Any services at an additional costs must be clearly identified and included in the document estimate per upgrade requested. | Must have |  |  |
| The system offering must include updates done seamlessly and free of charge. | Must have |  |  |
| The addons custom developments and integrations must be designed not to interfere with any updates and upgrades of the solution, meaning that if any additional custom developments needed, these customisations will not be of any issue during any updates or any upgrades along the years | Must have |  |  |
| The addons custom developments and integrations updates and upgrades must be seamlessly | Must have |  |  |
| The System must handle seven-thousand-member (7,000) profiles (currently 10GB but planning to have an increase of 10% every year) | Must have |  |  |
| Able to handle an average of 2 to 3 mailshots per week of around 11K contacts, this will increase as we grow | Must have |  |  |
| Have the ability to have up five thousand 5,000 users as visitors per day to log-in their membership profile | Must have |  |  |
| 200 hours in assistance over and above the support provided during the go live. | Must have |  |  |
| Included in the system offering must have 40 hours training to cover the user training for the duration of the project | Must have |  |  |
| The marked Customisation/Development, Additional Applications and module and Integrations must be included in the Financial bid | Must have |  |  |
| The System offering must include the importation of the data as specified in Annex 2 | Must have |  |  |
| The System should include visibility that adhere to the EU publicity requirements as per Regulation EU 1303/2013 | Must have |  |  |
| The software applications used should be in line with Industry standard criteria for online accessibility. | Must have |  |  |

### FINANCE

**The Financial solution support all the financial aspects, provides means of financial transactions with accurate reporting, including General Ledger, Debtors’ Ledger, Creditors’ Ledger, Invoicing and Cash Book.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** | | **N** | |
| The system must support all financial aspects with accepted accounting principle under the Malta Financial Authority legislation regulations | Must have |  |  |  |  |
| Support multiple companies (2); | Must have |  |  |  |  |
| Main Company (non-vatable) | Must have |  |  |  |  |
| Company Services (vatable) | Must have |  |  |  |  |
| Supports the auto updates in the GL from other modules, such as sales, crm, purchasing . . . | Must have |  |  |  |  |
| Supports charts of accounts groupings such as: 0010-1151 balance sheet, 1200-1352 bank, 2100-3220 profit and loss, 4000-4035 income accounts, 5010-5035 projects accounts, 7000-9999 expenditure. | Must have |  |  |  |  |
| Fiscal year setup supports | Must have |  |  |  |  |
| Main Company : January – December | Must have |  |  |  |  |
| Company Services : October | Must have |  |  |  |  |
| Euro currency only | Must have |  |  |  |  |
| Provides a journal entry function | Must have |  |  |  |  |
| Provides setup for intercompany postings | Must have |  |  |  |  |
| Provides enquiries of any ledger showing transactions in detail | Must have |  |  |  |  |
| Provides control for which accounts are open or closed for posting | Must have |  |  |  |  |
| Provides Cash Book that is integrated with GL, Debtors and Creditors | Must have |  |  |  |  |
| Supports multiple cash and bank accounts | Must have |  |  |  |  |
| Provides petty cash and expenses claims | Must have |  |  |  |  |
| Provides cash books and bank statements reconciliation | Must have |  |  |  |  |
| Supports VAT including VAT reporting for Company services ltd only | Must have |  |  |  |  |
| Supports combined debtors and creditors queries and reporting | Must have |  |  |  |  |
| Supports Debtors ledger transaction update by approval | Must have |  |  |  |  |
| Supports Creditors ledger transaction update by approval | Must have |  |  |  |  |
| Support credit management | Must have |  |  |  |  |
| Supports SEPA payment including creation of SEPA file | Must have |  |  |  |  |
| Able to provide invoices, receipts, payments, debit and credit notes and adjustments | Must have |  |  |  |  |
| Provides debt collection through aged analysis, debtor statements etc. | Must have |  |  |  |  |
| Supports the means of a follow up to debtors via email | Must have |  |  |  |  |
| Supports the means of a follow up to debtors via SMS / WhatsApp | Nice to have |  |  |  |  |
| Provides Fixed assets register | Must have |  |  |  |  |
| Able to receive notification of payment from multi-channel such as Website Payment gateway; Cash sale; cheque receipt; direct Bank transfer | Must have |  |  |  |  |
| Able to convert the sales order generated from CRM to an invoice | Must have |  |  |  |  |
| Support the ability to identify a generation of a quotation / sales order and will not allow if not in the correct company; such as member fees non-vatable and services vatable | Must have |  |  |  |  |
| When payment is received, the status of the member is updated in the CRM as an active paid member. | Must have |  |  |  |  |
| Supports the generation of invoices for the upcoming renewals by month | Must have |  |  |  |  |
| Able to identify the email of the accounts department to send the invoices | Must have |  |  |  |  |
| Support the generation of invoice to 3rd party companies for the business referral for a particular type of service provided | Nice to have |  |  |  |  |
| Support the sending of the upcoming renewal invoices via email | Must have |  |  |  |  |
| Reports: supports the ability to issue all reports for any selected criteria such as: monthly; quarterly etc. | Must have |  |  |  |  |
| Provides standard reports covering Trial Balance, Profit and Loss, Balance sheet, Cash flow | Must have |  |  |  |  |
| Provides standard fixed assets reports | Must have |  |  |  |  |
| Provides standard debtors and creditors list reports, sales and purchase reports | Must have |  |  |  |  |
| Provides standard VAT reports | Must have |  |  |  |  |
| Supports the facility to issue Payment transactions for salaries and commissions | Must have |  |  |  |  |

### CRM / MEMBERS / MARKETING

**The Solution must provide a 360-degree view of the member starting from the prospect and the first point of contact as a member. Keep track of all point of communications, from lead to a confirmed member, the history, the issues (tickets/cases), queries, support, purchases and services requests. It is required to support the user interface membership portal.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| CRM to provide a 360-degree view of all the activities starting from leads to members | Must have |  |  |  |  |
| Provide a unique membership number | Must have |  |  |  |  |
| Provide membership details such as Name & Surname, Business Name, Director ID, Director Date of Birth, additional contacts | Must have |  |  |  |  |
| Able to add a new field in the members profile | Must have |  |  |  |  |
| Able to hold multiple email for different department for a company member | Must have |  |  |  |  |
| Able to route an email according to the subject matter; such as invoices to accounts department email; invite to the main contact; surveys to the person concerned, identified by groups, mail shots | Must have |  |  |  |  |
| Provide membership company details such as Company Registration no., Contact No., Website, multiple emails and contact numbers | Must have |  |  |  |  |
| Provide membership company type such as established year, no. of outlets, customer relation, turnover, no. of employees, fee rates ; these are all drop down predefined groups | Must have |  |  |  |  |
| Provide the membership category such as groups | Must have |  |  |  |  |
| Provide Category tags and sub category tags, with multi tag function, such as having 5 level of category tiers. | Must have |  |  |  |  |
| Provide membership status such as pending, paid, refunded, cancelled, expired, resigned | Must have |  |  |  |  |
| Provide VAT No. entry field | Must have |  |  |  |  |
| Provide pre-defined Locality drop down list & Country | Must have |  |  |  |  |
| Provide pre-defined Street Name drop down list with option to override list manually according to the permission level. | Nice to have |  |  |  |  |
| Provide additional yes or no statements in the Form setup | Must have |  |  |  |  |
| Provide additional free text fields for additional information | Must have |  |  |  |  |
| Provide the category groupings of members to identify if the member is part of a committee/or multi committees (additional flag that form part of a particular group committee) | Must have |  |  |  |  |
| Able to check and identify any existing registered members upon requesting a new registration | Must have |  |  |  |  |
| Able to handle Group of Companies as a member and the correspondent companies listed under the Group of Companies as the main | Must have |  |  |  |  |
| Able to avoid double registrations even under the correspondent companies | Must have |  |  |  |  |
| Able to manage the renewals and payments | Must have |  |  |  |  |
| Able to have a full view of the payment membership history | Must have |  |  |  |  |
| Able to have a full view of the services provided, all the jobs invoiced in detail | Must have |  |  |  |  |
| Able to provide full view that covers communications such as email correspondence | Must have |  |  |  |  |
| Able to provide full view that covers all kind of contact, calls, SMSs etc. | Must have |  |  |  |  |
| Able to generate a quotation on the service provided and convert it in a sales order | Must have |  |  |  |  |
| Supports: pre-defined services such as 3rd party offerings and be able to enter free text as a service in the quotation or sales order | Must have |  |  |  |  |
| Able to generate and send pro-forma invoices via email to the related member email (designated account contact) | Must have |  |  |  |  |
| Able to send emails with an invitation link to join WhatsApp group chat and events or any other | Nice to Have |  |  |  |  |
| Support seamless integration with the Finance module to provide a fiscal invoice of the service provided | Must have |  |  |  |  |
| Able to provide full view of any invoiced services provided | Must have |  |  |  |  |
| Able to provide full view of any purchase invoices | Must have |  |  |  |  |
| Member to be able to request support assistance via the case management | Must have |  |  |  |  |
| Able to generate tickets from an incoming email; chat bot; call and triggers notifications and reminders | Must have |  |  |  |  |
| Able to assign tickets | Must have |  |  |  |  |
| Able to allocate the assistance request to designated personnel | Must have |  |  |  |  |
| Able to keep the history of the request | Must have |  |  |  |  |
| Able to keep track of the request | Must have |  |  |  |  |
| Able to trigger a workflow rules and notifications | Must have |  |  |  |  |
| Able to keep track of all electronic communication, such as voip calls | Must have |  |  |  |  |
| Able to show the time frames of the tickets | Must have |  |  |  |  |
| Able to show the statuses of all the cases and generated tickets | Must have |  |  |  |  |
| Able to send automatic reminders for unpaid membership | Must have |  |  |  |  |
| Supports integration with calls, website, chat, emails, calendar and social media | Must have |  |  |  |  |
| Able to provide lead generation | Must have |  |  |  |  |
| Able to allocate the lead to an employee | Must have |  |  |  |  |
| Provides lead statuses | Must have |  |  |  |  |
| Supports the generation of selected lists for mailshots taking in consideration specific criteria and filters | Must have |  |  |  |  |
| Supports campaigns using various channels such as email, web forms, social media | Must have |  |  |  |  |
| Ability to have statistic measures of the campaigns | Must have |  |  |  |  |
| Ability to attach any Forms such as the membership Form; any bank payments; any scanned documents such as supplier invoices, scanned copy of any document related to the member | Must have |  |  |  |  |
| Able to generate a report by type of service provided such as the pre-defined services | Must have |  |  |  |  |
| Reporting: ability to create and save reports based on multi-criteria and filters such as; renewals due date by month; over dues; by sector; by category, by sub category; by tags; members; non-members; committee etc. | Must have |  |  |  |  |
| Supports reporting, dashboard and analytic functions on real-time data | Must have |  |  |  |  |
| Able to search and filter by any field | Must have |  |  |  |  |
| Able to setup pre-defined fields to consolidate the data information such as drop downs, standard categories, standard locality etc. | Must have |  |  |  |  |
| Able to create additional groups, tags, categories and the sub categories (the drop down lists) | Must have |  |  |  |  |
| Able to create a receipt/pro forma invoice for the service provided and send to the member | Must have |  |  |  |  |
| Permissions: Able to have different levels of permission | Must have |  |  |  |  |
| Able to create a report indicating the sales person, listing the membership fees paid for commission purposes | Must have |  |  |  |  |
| Able to create a report with generated sales from the website that are not allocated to a sales person, listing the membership fees paid | Must have |  |  |  |  |
| Support mass mailing, with the predefined targeted audience list from CRM members and leads (non-members) | Must have |  |  |  |  |
| Mass mailing solution provided must support mass mailing security features with no sending delays. | Must have |  |  |  |  |
| Able to send mass mailing of 20K emails at one go with a statistical result of the deliveries, following email security protocols. Currently using PHP list system, but can be replaced if part of the solution provided assuming that it will reach the same targets. | Must have |  |  |  |  |
| Supports the printing of labels with Member detail and address | Nice to have |  |  |  |  |
| Analytics: Able to have a full view of the activities, visibility of the type of services used giving full data of the interactions, able to filter and set criteria, per group, per type, per tag and as well for each member | Must have |  |  |  |  |
| Able to identify any inactive members for a specific period such as previous 3-6 months | Must have |  |  |  |  |
| Able to generate a report for the inactive members follow specific criteria and rules | Must have |  |  |  |  |
| The Solution must provide a Chatbot function | Must have |  |  |  |  |
| The Chatbot function to have AI capabilities | Nice to have |  |  |  |  |

### SURVEYS

**The Survey module enables the feasibility to reach out more to the members and to non-members. Giving the facility to manage any data collection via Surveys.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| Surveys: Support the creation of surveys | Must have |  |  |  |  |
| Able to brand and design the survey according to the organisations’ specific needs. | Nice to have |  |  |  |  |
| Able to send surveys to the selected members eg. Specific sector | Must have |  |  |  |  |
| Able to send surveys to the correct designated email within the selected members | Must have |  |  |  |  |
| Support the ability to trace with a unique identifier; Able to trace the survey for statistical purposes, such as: to identify surveys replied and submitted, and cannot re-issue if already submitted (but still keeping participant anonymous) | Must have |  |  |  |  |
| Surveys must be active, with the function to recall the user activity, such as the ability to identify the stage and the completion of the form. | Must have |  |  |  |  |
| Able to collect the aggregation results | Must have |  |  |  |  |
| Ability to have a multi-level of data filter, having the visibility of the results on a particular question | Must have |  |  |  |  |
| Analytics: Able to have a full view of the stages and completion of the surveys, the replies and feedbacks. Able to generate the statistical reports | Must have |  |  |  |  |
| Analytics: Able to generate info-graphics (graphs) based on the responses received. | Nice to have |  |  |  |  |

### EVENTS

**The Event module enables the feasibility to reach out more to the members and to non-members. Giving the facility to manage any type of Event and to manage the attendees.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| Supports events generation such as conferences, seminars, workshops, meetings, webinars, learning sessions, fairs etc. and not limited to | Must have |  |  |  |  |
| Able to add different types of events; eg. the seminars, conferences, meeting etc. | Must have |  |  |  |  |
| Support the creation of a form at user level | Must have |  |  |  |  |
| Able to generate list with targeted audience using the filter and selection of criteria | Must have |  |  |  |  |
| Able to invite guests to the event | Must have |  |  |  |  |
| Able to identify the email of the main contact for an invitation | Must have |  |  |  |  |
| Able to send invitations via email to the selected audience | Must have |  |  |  |  |
| Support the online registration from any online form or application | Must have |  |  |  |  |
| Supports the update of registered attendees in CRM Members profile | Must have |  |  |  |  |
| Able to flag non-members during the registration | Must have |  |  |  |  |
| Able to trigger and direct them to the new registration member process if the registered member is not yet a member | Must have |  |  |  |  |
| Able to vet if an active member has no pending payments | Must have |  |  |  |  |
| Able to register attendance | Must have |  |  |  |  |
| Able to issue reports on registered attendees that attended or did not attend in either excel or csv file types | Must have |  |  |  |  |
| Able to organise events; upload the meeting documents; agenda; to the selected Exec. members; select specific members to send them documents via email | Must have |  |  |  |  |
| Ability to send feedback forms following any event | Must have |  |  |  |  |
| Physical events: Able to process physical attendees via mobile applications and update seemlessly in real-time | Nice to have |  |  |  |  |
| Able to organise calendars and manage speakers | Nice to have |  |  |  |  |
| Able to create / add sponsors to an event | Must have |  |  |  |  |
| Able to generate statistical reports on any filter or criteria of any type of event generated | Must have |  |  |  |  |

### PROCUREMENT

**The Purchase module enables the sourcing of items and services the organisation is required.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| Supports creation of manual requisition orders | Must have |  |  |  |  |
| Supports requisition orders for inventory and non-inventory items (services) | Must have |  |  |  |  |
| Provides support for multi-level approval workflow | Must have |  |  |  |  |
| Allows preparation of quotation requests to vendors | Nice to have |  |  |  |  |
| Provides for creation and set up of vendors - including payment terms | Must have |  |  |  |  |
| Provides the ability for partial/staggered payments | Nice to have |  |  |  |  |
| Processed invoices automatically update the creditors ledger | Must have |  |  |  |  |
| Ability to check on status of requisition orders, quotation requests and purchase orders | Must have |  |  |  |  |
| Ability to run year-to-date reports on vendors | Must have |  |  |  |  |
| Provides a list for payments due with bank details with approval process | Must have |  |  |  |  |
| Upon payment confirmation allows to post them and marked as paid | Must have |  |  |  |  |
| Able to upload the supplier invoice document | Must have |  |  |  |  |

### REGISTRATION and RENEWALS online

**This section is to make sure that the system provides the means of integration with the front end of the website that uses MemberPress or any other Provided Membership solution for the registrations of the current, the new members and the renewals. That supports as well forms online and as well a payment gateway to process payments via current payment gateway (Trust Payments, Aquiring.com). This must be seamlessly integrated with the back end Solution to have an automation of processes and updates both ways.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| Fully integrated with the MemberPress, if the solution provided does not provide the WordPress interface with its own Membership Solution | Must have |  |  |  |  |
| Supports life Chat integration (Chat bot) | Must have |  |  |  |  |
| Supports a seamless method to update any data changes from CRM Membership solution and MemberPress and vice versa, such as having the same data access irrelevant from which User interface they are accessing | Must have |  |  |  |  |
| CRM has to be able to have triggers or notifications for actions done from the Website or the Membership portal, having synchronised data throughout | Must have |  |  |  |  |
| CRM has to be able to receive notifications for any payment done through the payment Gateway currently in use - Trust Payments (Aquiring.com) | Must have |  |  |  |  |
| Able to update the online payment in CRM Membership profile and post the payment in the GL; sends a notification to accounts to generate the paid invoices | Must have |  |  |  |  |
| Able to update the member as paid member when payment is done in full online | Must have |  |  |  |  |
| Able to update any registrations done online as a non-paid member in CRM Membership and send a notification to the user to follow up for payment | Must have |  |  |  |  |
| Able to update the member as pending member when payment is done offline | Must have |  |  |  |  |

### INTEGRATIONS

**The Solution is expected to have API available to be able to integrate with other applications, either with the existing applications that the organisation is using or other suggestable applications that may have more benefit of use.**

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| **Requirements** | **Value** | **Response\*** | | | |
| ***\*Y=Yes (either through off the shelf solution, customisation, development or through additional applications)***  ***N=No*** |  | **Y** |  | **N** |  |
| Supports integration with Office 365 | Must have |  |  |  |  |
| Supports integration with Office 365 Calendar | Must have |  |  |  |  |
| Supports integration with the website; WordPress | Must have |  |  |  |  |
| Supports integration with MemberPress, if the solution provided does not offer an alternative | Must have or Alternative Application |  |  |  |  |
| Supports integration with VOIP Telephony/soft phone (Asterisk) | Must have |  |  |  |  |
| Support integration with WhatsApp | Must have |  |  |  |  |
| To provide a chatbot feature | Must have |  |  |  |  |
| Support integration with TextMagic for generation of SMSs, or any other integrated sms solution | Must have or Alternative Application |  |  |  |  |

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Signature

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Name & Surname Company Name