



Scope of Work: www.dualcitizenshipitalian.com

v.1.0

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Table of Notifications

This Table represents the contacts in both companies as assigned currently.

Project	Name	Company
www.dualcitizenshipitalian.com	Andre Fontana	
Client Interface (Business)	Rob Lapointe	Software Developers Inc.
Client Interface (Technology)	Sachin Nayak	Software Developers Inc.

Aim

- To rebuild www.dualcitizenshipitalian.com using modern web design standards and custom, from-scratch technology.

Development Principles

The development principles of this turnkey solution will be:

- Built from scratch (except where noted)
- Language of Development – English
- Language of Data Entry – English

Coding Standards

- Industry standard techniques for Responsive Web Design. Website will be mobile friendly for content purposes, but file creation and document uploading must be done from a personal computer.

FEATURES & FUNCTIONS:

1. Customer Portal

- a. Log in/New User (remember me checkbox)
- b. Create Files: Using a step-by-step process; answer a series of questions. (Similar to vitalchek)
 - i. Step One: determine what ancestor you are claiming
 - ii. Step Two: upload documents.
 - iii. Completed: Document is under review
 - iv. Review Completed: View and sign virtual contract (email notification & message in customer portal)
 - v. View Quote
 1. Pay online using PayPal
 - vi. Set Appointment: choose consulate location and appointment time/date (available dates set on Approver portal)
- c. View Family tree: Generated by the Create File process
- d. View and Add notes for each document uploaded
- e. Review/edit Contact information
- f. Change username and password

2. Admin

- a. User Management:
 - i. Add/Delete/Edit Customers
 - ii. Add/Delete/Edit Approvers

1. View pending approver sign ups to approve or deny
- b. File Management: Add/Delete/Edit Items for quoting
 - i. Cost for IDC (Not Visible by Customer)
 - ii. Price
 - iii. Discount
 - iv. Customer address and shipping information
 - v. Upload/delete documents under customer's name
 - vi. Location; state, county, city, zip code
- c. View and select customer submissions
 - i. Generate quotes
- d. Upload/change logos
- e. Assign customers to specific approver lists
 - i. Change User Account Status to Submitted to Consulate Approver
- f. Upload contracts and send to customers
- g. Change status on customer files
 - i. In progress
 - ii. Ordered
 - iii. Received - Reviewing documents
 - iv. Completed/Uploaded
 - v. Waiting on Customer/Please Review Notes
- h. Notifications to customer: select which actions will send a notification to customer (these settings are unique to each customer)
- i. Check notifications: see admin notifications
- j. Reports:
 - i. Sales reports based on total revenue, date, month, year, or by document
 - ii. Run reports by open documents
 - iii. Run reports by dates
 - iv. Run reports by completed documents
 - v. Run reports to see total dollar amounts & status of documents

3. Approver Portal

- a. Sign In/Sign Up: Approvers must be approved by admin before their account is active
- b. Scheduling: will use 3rd party API to manage appointment system
- c. Applicants Awaiting Approval: View customers assigned by Admin
 - i. View applicant's family tree
 - ii. Approve (green check mark) or deny (red X) as well as annotate customer documents
 - iii. Once all documents are approved, customer account will become "Ready for Appointment"
 - iv. If customer has selected an appointment date, this will be shown
- d. Applicants Approved:
- e. Settings:
 - i. Add/edit contact information

Investment details - Time & Cost

Estimated time for delivery is four months. Total cost is \$10,000.00

Payment and revenue sharing terms:

- \$4,000.00 up front
- \$2,000.00 after first demo
- \$4,000.00 due at completion and prior to going live

Warranty: SDI offers a 6 month warranty to fix bugs resulting from programming errors.