



# SOFTWARE SCORE SHEET

## Document Management Software

Please rank the software based on the following features using the following scoring method:



Mark a “+” when you believe the solution meets the requirement or need.



Mark a “▲” when you are unsure if it meets the need or not, or if you have a question.



Mark a “-” when you believe the solution does not meet the need.

<b>SEARCHING</b>	Trumpet + Worldox	Vendor #2	Vendor #3
Search by Client Name			
Search by Document Type			
Search by Account Number			
Search by keywords based on text in file - Optical Character Recognition (OCR)			

  

<b>SAVING</b>	Trumpet + Worldox	Vendor #2	Vendor #3
Save documents using predefined naming conventions & rules			
Save documents directly from a scanner			
Save documents directly from my computer (Native File Storage)			
Save multiple versions of the same document (File Versioning)			

  

<b>INTEGRATION</b>	Trumpet + Worldox	Vendor #2	Vendor #3
Integrate with my CRM			
Integrate with my Email software (such as Outlook)			
Integrate with my Client Portal			

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**SECURITY & COMPLIANCE**

Trumpet + Worldox

Vendor #2

Vendor #3

	Trumpet + Worldox	Vendor #2	Vendor #3
Classify documents based on type (HR, Legal, Accounting, etc.)			
Assign users to roles based on access level			
Provide the ability to store deleted documents for easy restoration			
Create retention rules for deleted documents			

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**SOFTWARE OVERALL**

Trumpet + Worldox

Vendor #2

Vendor #3

	Trumpet + Worldox	Vendor #2	Vendor #3
Navigate the user interface with ease			
Customize the system based on unique requirements			
Manage administrative maintenance without hassle			

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**VENDOR QUALITY & SUPPORT**

Trumpet + Worldox

Vendor #2

Vendor #3

	Trumpet + Worldox	Vendor #2	Vendor #3
Stable company with solid reputation			
Clearly established and proven project management procedures			
Engages different members in the implementation process to ensure user adoption			
Provides continued & comprehensive support after implementation			

## COST

Trumpet + Worldox

Vendor #2

Vendor #3

Provides clear understanding of the total cost of set-up and implementation

Provides clear understanding of the total cost of ongoing support & consulting

Provides clear understanding of the total cost of software (monthly fees, annual renewals, updates, etc.)

Provides clear understanding of the total cost of hardware (computers, servers, etc.)

## TRUMPET + WORLDOX

On a scale of 1 - 10, how well do you believe this software meets your overall needs:

1    2    3    4    5    6    7    8    9    10

Does not meet our needs.

Meets and/or exceeds our needs.

## VENDOR #2

On a scale of 1 - 10, how well do you believe this software meets your overall needs:

1    2    3    4    5    6    7    8    9    10

Does not meet our needs.

Meets and/or exceeds our needs.

## VENDOR #3

On a scale of 1 - 10, how well do you believe this software meets your overall needs:

1    2    3    4    5    6    7    8    9    10

Does not meet our needs.

Meets and/or exceeds our needs.