

Custom Plugin Requirements Worksheet

Describe the problem, the workflow and the systems involved

You do not need technical language. Describe what happens today and what you want to happen instead; we will translate it into a clear scope.

The problem

What is slow, manual or impossible today? _____

Who is affected (staff, customers, partners)? _____

Roughly how much time or money does it cost each week? _____

Today's workflow

Step 1: _____

Step 2: _____

Step 3: _____

Where do errors or delays usually happen? _____

The ideal outcome

When it works perfectly, what happens? _____

What does "done" look like for you? _____

Systems & data

- ☐ WordPress / WooCommerce version and hosting details
- ☐ Other systems to connect (accounting, shipping, CRM, payments)
- ☐ API documentation and test credentials for each system
- ☐ Who should be able to see and change what (user roles)
- ☐ A staging site available (or we provide one)

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Priorities

Must have: _____

Nice to have: _____

Deadline and budget range: _____

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