

# Center EX Feature Details

An overview of the more important features Center EX can bring to your program.

## Online Event Registrations



Allowing attendees to register online can't get much easier than this. Simply enter future events into Center IC and select one of the publish options on the event. The event is then automatically available on the website, with optional maximum capacity. Center EX generates a map and driving directions to aid the visitors find the location.

- Events automatically published to web
- Events automatically removed when cancelled or expired
- No double entry or external processes involved
- Email notifications sent to event coordinators and attendees
- Optional capacity can automatically close signup if event is full, with an email notification to the event coordinator
- Event search and lists by time range, nearest locations, and topic
- Enter optional event information directly into Center IC event page

## Online Event Payment (Optional Feature)



Accepting credit card payment for events can be complex, error prone, and can be fraught with security issues and red tape. At many centers it's practically impossible.

Center EX makes taking credit cards for payment as simple as changing a single setting on an event, and then depositing periodic checks.

- Choose which events to accept credit cards
- Accepts Visa, MasterCard, Discover and American Express.
- Secure transaction processing
- Handles refunds, cancellations and charge backs
- Integrated account reporting to show all transactions

## Online Counseling Requests

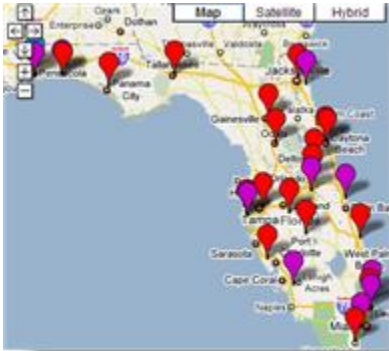


Few people like to fill out paper forms. With Center EX you can save valuable counselor *and* client time by allowing future clients to sign up online. Clients can even electronically 'sign' the SBA 641.

If your program desires an additional paper signature on file, you can have the client simply sign the 641 printed by Center IC, which is pre-filled in with their responses.

- Streamlines and automates intake, processing, and other administrative tasks
- Gets all pertinent 641 data
- Simple step by step interface for client to simplify completion
- Customizable questions
- Email notifications sent to counselor and client

## Center Directory



Now you can get all your centers on the same page, literally. With the center directory your visitors can easily search for centers by zip code, area, and visually via a live map.

Each center page allows a degree of personalized branding unique to the center, but still keeps the content consistent across multiple locations for the entire program to help with the 'big picture' branding and to improve the visitor's experience.

- Solution for confusing array of multiple sites for different centers
- Automatic maps and driving directions with nearest zip code search
- Highly customizable center pages
- Published events are shown automatically at each location

## Public Web Site



If you already have an investment in a good web presence, you can integrate Center EX into it so visitors will think it is a single web site. However, Center EX is powerful enough to function as your entire web site with its built in content management features.

The integration level is up to you. We can convert your current web content to Center EX content during implementation.



- Integrates seamlessly with existing websites
- Serve as your entire web site, which can be more cost effective and easier to manage than your current web site or collection of sites
- Program-wide look and feel helps bring consistency to your whole program's web image to prevent visitor confusion
- Content management functions make editing your web site a breeze
- Integrated analytics to track visitors and content access (e.g. page statistics and visitor information)
- Full text search of content to help visitors find what they need fast

## Web Site Content Management



Have you ever seen something on your website that was out of date or embarrassingly incorrect? With Center EX's web site content management, you and your staff are able to correct these types of problems easily. This feature gives you or anyone you designate the power to edit the web site and even extend it with new content.

Regional and local centers can easily create new pages for their own locations, which can help save time and money compared to running their own separate web sites. If that's not currently an option for certain centers, you can create links from Center EX pages to any other existing web based content.

- Easy-to-use web editor similar to a standard word processor.
- Edit existing and create new web content
- Easily link to other documents and even create new documents on the fly
- Save time and money by optionally consolidating your separate web sites into one site with a consistent program-wide look and feel
- Master page template helps keep all pages consistent with program wide branding

## Resource Library



Do you need a place to store resources for staff members and allow the staff to grow that library over time? Do you need a way to allow clients and attendees to securely download targeted documents, without all the problems of email attachments? The Center EX Resource Library does all that, with tracking and an easy to use permission system.

The Resource Library can be a powerful tool for organizing your internal information as well as improving your counseling programs.

- Intranet for internal documents for staff
- Public documents visible to all web site visitors
- Customer documents for clients only
- Easy permission system
- Auditing to see who downloaded what and when
- Tracks referrals to other sites
- Resources can be internal and external web pages, documents, videos, presentations, spreadsheets, podcasts, etc.
- Documents can be rated and commented on by clients
- Automatic document recommendations based on client information such as business status and geography

## Client Dashboard



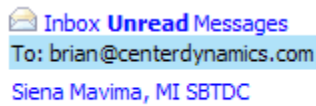
After clients register for counseling or an event they are taken to their 'Client Dashboard' which shows information customized just for them. They can see upcoming and past events, and take automatically assigned surveys based on their profile.

Center EX makes documents available for download based on automatic or counselor specific recommendations. Clients can update their contact and business information, which results in impact sessions if a business status change or change in employee count. Email notifications are sent to the appropriate counselor when clients change their information, so the counselor can validate any changes.

Clients can:

- See their registered upcoming events, past events, appointments, and their counselor contact info
- Securely download documents that are specific to their profile
- Comment on and rate documents
- Take adaptive surveys (questions change based on previous responses)
- Change their business information, which automatically generates impact

## Email Integration



Inbox Unread Messages  
To: brian@centerdynamics.com  
Siena Mavima, MI SBTDC

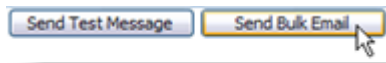


Center EX can capture email from the client to you and from you to the client resulting in a complete record of communications in one place; regardless of how many counselors see the client or where your email program resides.

Email integration makes it much easier for multiple staff members to assist a client when they have the full email record available. Email counseling is reduced from a time consuming copy and paste endeavor into a single step. After you experience the email integration in Center EX, you may not want to ever go back to the old way.

- Emails from and to your clients are placed into sessions automatically
- Easy way to track email counseling
- Gathers all correspondence with a customer into one easy to find place
- Works in parallel with your current email client, such as Microsoft Outlook
- Check and send from your inbox and outbox with clients anywhere you have an Internet connection.
- Customer email matching works as an effective spam filter

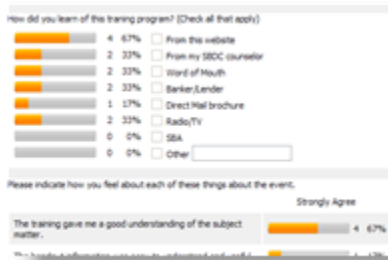
## Email Marketing



Center EX has a robust Email Marketing engine that reliably can send richly formatted emails to small or large groups of clients and attendees. You can choose the recipients from clients and attendees based on a simple and powerful filtering mechanism.

- Easy way to send a small or large group a email message
- Build a list of client and attendee recipients with a powerful state of the art filter system
- Lets you preview message by sending to yourself before sending to the masses
- Reliable email sending mechanism sends one email per client at a time, instead of large CC or BCC lists.
- Send out newsletters, links to documents in the library, survey invitations, etc.
- Bounced emails come back to your email box so that you can make appropriate changes to client records

## Online Surveys and Assessments



Event satisfaction surveys are just one part of this flexible surveying system. You can create surveys to evaluate client satisfaction, and survey just about any other metric you can think of. Special sections can be included in the surveys that track client specific data such as address and impact, which directly updates the client information in Center IC. Surveys can be automatically assigned to clients and attendees based on their profiles.

- Event and counseling satisfaction surveys
- Build your own surveys with customizable checkboxes, grids, pick-lists, etc.
- Utilizes special survey sections that allow clients to update their address, business status, categories, loans, contract and other impact, all while taking a survey
- Automatic survey recommendations open surveys up to particular sets of customers and attendees, based on their information
- Surveys can be adaptive, meaning they can alter the next questions based on previous answers.
- Surveys can be taken online by clients, or entered by staff from paper forms

## Online Task Management (Planned Optional Feature)






Coordinating efforts in an online environment is a daunting task. Online Task Management can serve as a simple shared task list or manage more sophisticated projects composed of multiple interdependent tasks, milestones, and deadlines.

Internal tasks and projects can make managing your counseling activities much more streamlined. Customer projects can serve as the framework for a counseling plan or a multi-step efforts like a business or marketing plan.

- Simple to use interface for managing tasks
- Powerful features for organizing tasks into projects
- Internal projects for organizational efforts
- Customer projects for managing and enhancing counseling efforts

## EX Analytics (Planned Optional Feature)

	2003		
	Qtr 2		Qtr 3
	 Hours Goal	 Counseling Hours	 Hours Goal
Center	741.00	549.15	741.00
Location	72.00	42.40	72.00
Fiscal Year	108.00	145.75	108.00

Drag and drop business intelligence is here with EX Analytics. Slice and dice your data in multiple dimensions in real time for virtually unlimited possibilities. Ever wanted to know how many veteran clients a center saw in the 4<sup>th</sup> fiscal quarter of 2006? Just drag three items over to the live grid, and not only will you find the answer for that particular example, but you will then be able to rank, sort, graph, trend, and compare all sorts of aggregate data points with a few clicks.

It's much more powerful than just a linear report builder; it's an analytic tool that gets you all sorts of numeric answers, fast.

- Find numeric analytic answers fast, without building traditional reports
- Slice by center, counselor, and all sorts of client data points
- Slice by calendar and fiscal periods
- Compare goals to actual numbers in various scenarios

Planned features may be subject to change