Center IC Feature Details

Below is an overview of the more important features Center IC can bring to your program.

Popular Counseling and Event Management System

In use at more statewide SBDC programs than any other system, and used by numerous other economic development organizations, Center IC is a leading web-based Client and Event Management system.

- Over 500 centers across the country use Center IC as a critical part of their operations every day.

- Years of customer feedback and counselor experience incorporated into Center IC's interface and data models.

Contact Management
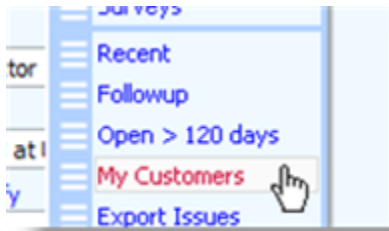
At Center IC's core is its flexible contact management system. Contacts can be as simple as a name or as complex as an organization of people, their relationships, and your history of interactions. Designed for counseling, contacts can include demographic and business status information as well as a record of the impact of your counseling services.

- Multiple types of contacts including Customer, Client, Attendee, Lead Representative, Member, etc.

- Build hierarchical links between clients with Smart Relationships

Event Management
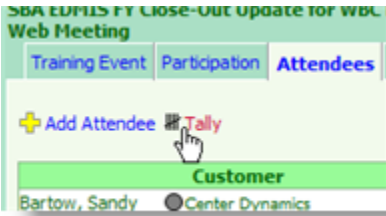
Center IC's Event Management system tracks events through their whole lifecycle from scheduling to attendance and fee distribution. The Tally feature automatically analyzes the attendees and produces attendance counts by demographic. Report and Internal events enable you to track your organization's activities and use the reporting engine to analyze internal and external workshops, meetings, events, etc.

- Templates make recurring events easy to manage

- Enter attendee total counts, or individual attendees to have Center IC count them.

- Can optionally enter staff participation time for the events to help track productivity.

- Can initiate a mass email to all the attendees of an event

Intuitive User Interface

Center IC lays out all of the pertinent information in an easy to understand format. You don't have to hunt through screens or dig through menus to find an address, status or note that should be right in front of you.

View and update customer relationships all in one place. Center IC presents counseling sessions, appointments, events, miscellaneous notes and other chronological information in a single, easy to use form.

- Logical data organization based on common user roles

- Color coded data and areas help users to keep track of their information at a glance

- Tracks customer relationship over time

- Quickly view customer status changes

- All interactions with a client are shown chronologically in a single easy to use list

- Interface is tuned to be very friendly to counselors, because it was designed by a former SBDC counselor

Powerful Reporting Engine
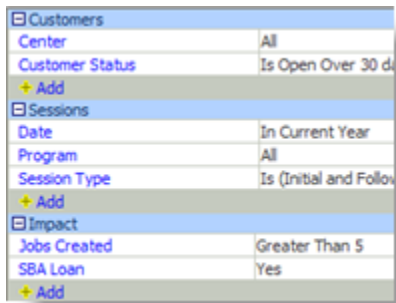
You work hard to collect accurate, useful information about your counseling programs. The Center IC Reporting Engine provides a suite of highly customizable reports for you to get information out of the system in an easy to understand format. Center IC can generate presentation quality reports in PDF, Excel, Word and Access formats. The custom grouping feature of the Center IC Reporting Engine lets you analyze information in ways most other reporting systems cannot provide.

- Numerous pre-designed reports for specific requirements

- Extremely flexible report filtering criteria

- Unique multi-level report grouping options can slice your data in thousands of combinations to answer unique questions

- Form letters and mailing labels

- Microsoft Excel, Microsoft Access and Microsoft Word data exports.

- Geographic Heat Map reports can show activity in your zip code, county, state, or even across the country. The state map at the top of this document was created by our map report.

SBA EDMIS 2 Integration
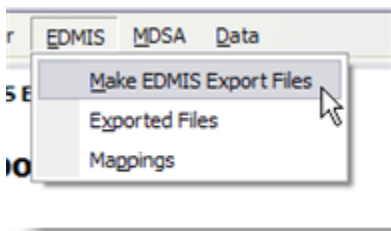
One of the primary design goals of Center IC was to make integration with EDMIS as painless as possible. The Customer and Event management features fully support SBA EDMIS2 reporting requirements.

- Meets SBA 641 and 888 data gathering requirements

- Generates EDMIS 2 compliant export files

- Handles the nuts and bolts of EDMIS details, so your staff can focus on more productive and interesting endeavors

Secure, Web-Based Deployment
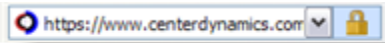
Web-based software has become the platform of choice primarily for its ease of management and deployment. Center IC is a secure, web-based software platform using SSL encryption for data security and configurable authentication policies to prevent unauthorized system access.

- Web application with zero deployment means no user desktop headaches

- Secure SSL browser communication for end to end security

- Configurable password security policies helps to keep out intruders

Counselor and Center Goals

Keep an eye on your performance using Center IC's Center and Counselor goals. Both counselors and directors can see how they are doing compared to counseling and impact goals, live on their dashboard pages. The goals reports can give you a more general or specific view of performance depending on your needs.

- Center and Counselor Goals

- Goal reports help you keep an eye on performance

- Budget, Counseling, Impact, and Event goals

EDMIS Scorecard

Uploading data to EDMIS can be a challenge, and understanding the SBA metrics can seem to require a special college degree.   The EDMIS scorecard simulates the metric calculations that the SBA will perform on your data upload before it is sent, and shows it on a single screen. All values on this screen are links that allow you to drill into the details. This provides an invaluable tool for finding data issues before they become problems.

- EDMIS metric simulation - see how EDMIS will see your data, before you send it to them

- Excellent for finding data entry errors

- Can drill down and sort the details to see how the numbers aggregate from each client

User Dashboards

The latest information you need in an easy to understand format. Each of the major categories of information has a user specific dashboard to help users locate the most current and relevant appointments, counseling sessions, events, reports, etc.

- Users have personalized Customer, Event, User, and Report dashboards

- Plus a global system dashboard with highlights from the other dashboards

Flexible Permission System

Center IC's permission system lets you control what each user can do globally and at the center level. Permissions are assignable by center, function, and counseling program.

- High granularity of control

- Easy to set up guest counselors or data entry personnel

Flexible Categorization System

The Smart Categories system in Center IC enables you to tag customers with as many different attributes as you need. You can run reports, search customers, and group data based on the categories you need for your customers.

- Completely customizable sets of customer categories

- Useful for generating mailing lists or quickly filtering reports or lists

Appointment Tracking

Schedule a follow-up while entering the information for your last counseling session. Center IC manages appointments alongside all of the other chronological information for a customer so you can get a complete picture of your customer relationships. Once the appointment occurs you can turn it into a counseling session to keep the records clean.

- Quick followup and reminders make appointments a snap

- Appointments can be downloaded into Microsoft Outlook and other personal calendars

Calendar View

Center IC's calendar view displays all of your sessions and events in a single compact format. You can filter the view on a single type of entry like appointments or get a complete view of all your past and present activities.

- One place to get the big picture

- Displays Appointments, Counseling Sessions, and Events in a easy to understand time line

- Instantly answers the question, "What did I do yesterday (or last week, month, quarter)?"

Case Management and Customer Follow Up

Ever wonder which customers should be followed up with next? The account aging features in Center IC show you how long its been since a customer has been seen and categorizes them into time bands for follow-up.

- Intuitive color coding scheme to help prioritize customer follow up

- Aging bands help identify customers that need the most attention

Collaborative Counseling

Often multiple counselors must provide services to a single customer. Depending on permissions, several counselors can share a customer so that the customer gets what they need and the effort is tracked appropriately, regardless of the where the client is counseled.

- Multiple counselors can enter sessions for a single client

- Customers are not 'owned' by a single counselor

- Guest counselor permissions can extend collaboration beyond center permissions

Configurable Data Validation
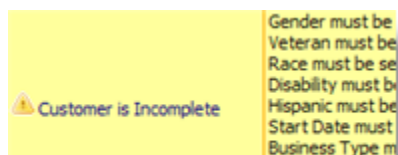
Center IC provides several layers of data validation to insure the information you enter helps you rather than causes more work in the future. The main data entry pages have very powerful customizable validation rules to prevent errors, omissions, and duplicates. Special EDMIS support is available to help you make sure your data is clean before you report to the SBA. Center IC validation rules are much more powerful than a simple 'required' or 'not required'. The rules can be based on multiple data points and they support complex logic to help prevent wasting user's time on unnecessary requirements.

- Default validation rules insure reasonable data collection for the different types of contacts

- Behind the scenes EDMIS validation helps correct invalid data entry on a constant basis instead of just at the end of the quarter

- Validation Rules can utilize complex logic to only require data based on multiple variables, saving counselor time.

File Attachments

Keep all your client related files in a single easy to find place - directly on the customer's file in Center IC. Attach spreadsheets, business plans, success stories, photos, scanned paper forms, etc. Files can be given permissions so they are private to the counselor that added them, or public for all counselors to see.

- Easily accessible location to store client specific files such as spreadsheets and other documents.

- Permissions to allow other counselors to view or replace files as needed

Online Request for Counseling

Either from the internet or in your office lobby, Center IC's Online Request for Counseling makes customer intake much easier for everyone.

- Customers can easily notify you if they need counseling

- Reduces the workload of counselors

- Office Lobby deployment streamlines initial counseling steps - with it you can let new clients use a PC in your lobby to fill out the RFC instead of handing them a clipboard and pen, saving their time as well as your staff's time.

Hosted Solution

Tired of struggling with your local IT organization? Center Dynamics Hosting provides a safe and secure home for your Center IC. Our servers are backed up daily and we provide redundant locations across the US in case of a facility outage.

- Daily backups, securely shipped offsite to **two** different US locations for safekeeping

- Redundant, distributed geographical locations

- 99% Uptime Guarantee

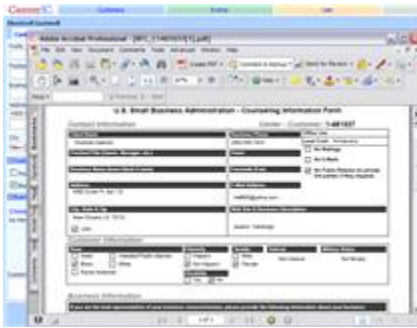- No worries - software versions are always up to date

Outlook Integration

Center IC exports Customers, Events, and Appointment information for Outlook integration if you need to merge your Center IC information with your organizational calendar or contacts.

- vCard integration with Outlook and other contact management systems

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Automatic Forms

For those situations when you need a signature on paper, Center IC fills out both SBA 641 and 888 forms with customer and event information in PDF format for printing.

- High quality, printable forms in PDF format

- Using the Online Request for Counseling, clients can fill out the RFC online and simply sign the printed version