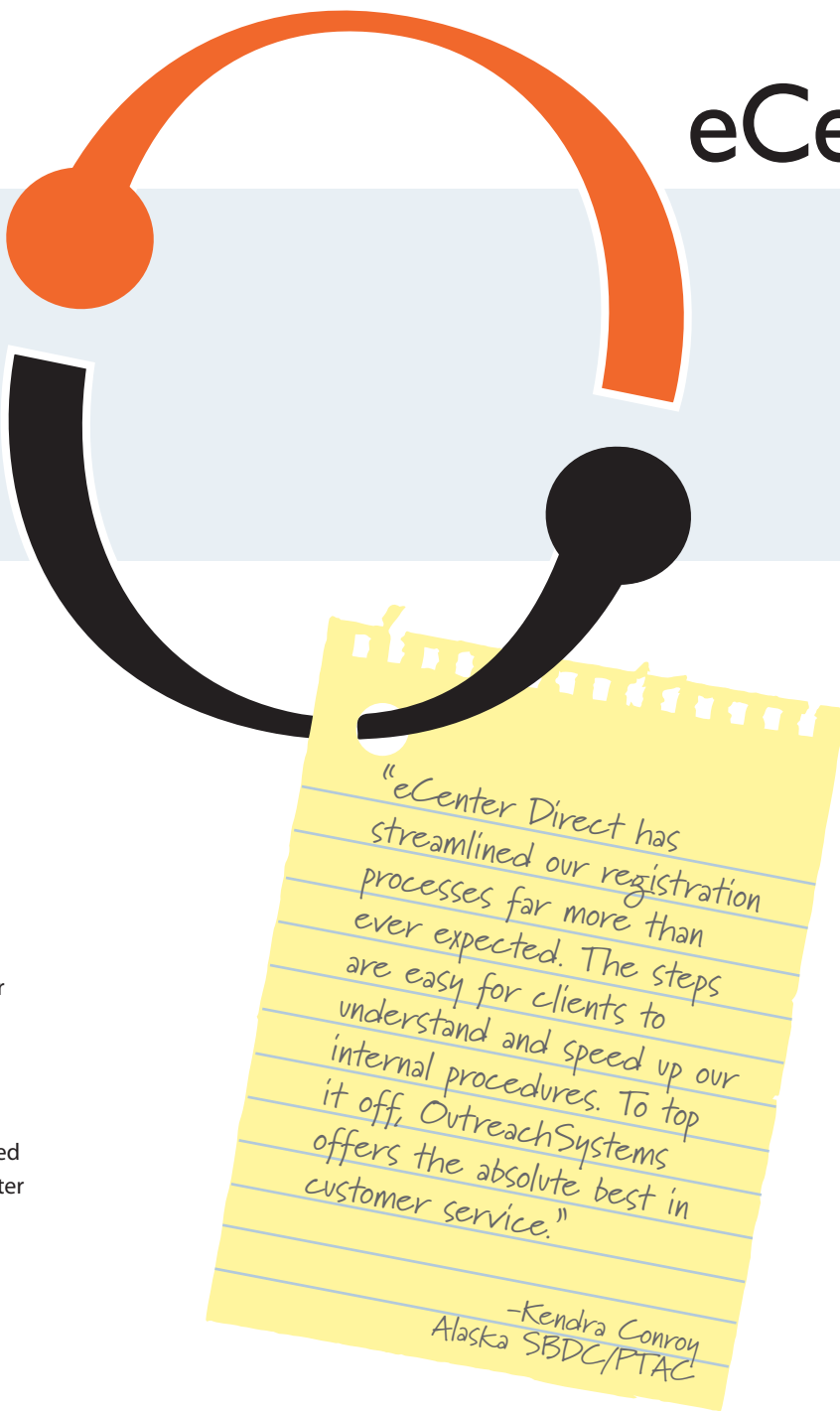


eCenter Direct

What Can eCenter Direct Do for Your Program?

Make the most of your program's Web site with eCenter Direct, a client Web portal that enhances your client communications. Clients (and prospective clients) can use this Web portal to request services, register for training events, complete surveys, and submit milestones. And it's all integrated with WebCATS!

Less data entry work for you, increased visibility for your center's events, better client tracking, and a well-informed audience. You can't go wrong with eCenter Direct.



"eCenter Direct has streamlined our registration processes far more than ever expected. The steps are easy for clients to understand and speed up our internal procedures. To top it off, OutreachSystems offers the absolute best in customer service."

-Kendra Conroy
Alaska SBDC/PTAC

Customizable Interface

Some programs use eCenter Direct as the entry point (i.e. home page) for their Web sites, while other programs choose to link into eCenter's functions from existing pages. Either way, almost every aspect of eCenter's interface is customizable—not only per program, but also per individual centers within a program.

See eCenter Direct in action! Call us for a guest account user name and password.



The screenshot shows the eCenter Direct Home Page for Central Coast Development Centers (CCDC). The page layout includes a top navigation bar with the logo, a login section, a left-hand menu, a central mission statement, and two right-hand boxes for new and existing clients. Callouts highlight the following customizable areas:

- Your logo here:** Points to the CCDC logo in the top navigation bar.
- Your menu options & custom titles here:** Points to the left-hand navigation menu.
- When you create a contact record in WebCATS, a password is automatically generated. Your contact can use this password, along with their e-mail address, to log into eCenter.** Points to the login form fields (E-mail, Password, Remember password, Retrieve password).
- Your custom welcome text and instructions here.** Points to the 'New Clients' and 'Existing Clients' boxes on the right.

At the bottom of the page, it states: eCenter Direct is maintained by [OutreachSystems](#).

Almost every aspect of eCenter's interface is customizable—not only per program, but also per individual centers within a program.

eCenter Direct Home Page

eCenter Sign-Up Form

Santa Barbara Center: Sign-up For Services

Thank you for your interest in our program's services. Please fill out the following form as completely and accurately as possible. All mandatory fields appear in **bold**.

First Name: MI: Last Name:

Mailing Address:

City: State:

Zip Code: [Validate Address](#)

County:

Home Phone: Work Phone:

Fax:

E-mail:

Please include me in future mailings

Please complete the following fields so that we may better serve you in the future. All fields will remain confidential.

Gender: Race:

Hispanic: Veteran:

Reservist: Disabled:

Company Status: Business Type:

Briefly describe your company's products/services:

Online Client Sign-Ups

Prospective clients can sign up for services right from eCenter Direct. When a new client selects this option, they are provided with a sign-up form that has been customized to your center's data requirements.

The information collected by this form is uploaded to your WebCATS database as pending client and contact records. *Pending* is the key word here. The new client record and its associated contact record won't be added to the database until you approve the counseling request.

Client Sign-up Detail Accept as Client Accept as Pre-client Reject Duplicate

Request Number: 50437 Request Status: New Request

Company: Melvin's Mutts
Name: Melvin K. Carson
E-mail: m.carson@gmail.com
Interested in receiving mass e-mailings? No
Work Phone: (805) 882-2381 Home Phone: (805) 882-7099
Cell Phone: Fax:
Secondary Business Phone:
Gender: Male Race: White/Caucasian
Hispanic Origin: Hispanic Veteran Status: Non-veteran
Reservist Status: None Disabled? No
Referral From: Other

User-Defined Fields (Contact)

Company Information

User-Defined Fields (Client)

Counseling Information

Notes

Agreement

2010 12:28:17 PM by eCenter (m.carson@gmail.com)
12/16/2010 12:28:17 PM by eCenter (m.carson@gmail.com)

When a new client signs up for services from eCenter Direct...

...the request shows up in WebCATS as a counseling request record.

WebCATS counseling request record

Client Sign-Up

Event Registration

Survey Completion

Account Management

Introduction

Customizable Interface

Core Functions

Online Event Registrations

From eCenter Direct, anyone can browse or register for your program's upcoming training events. The events listed on eCenter—and their details—are pulled directly from the conference records in your WebCATS database. Because you decide which training events get published and which don't, the same conference record can be used for both internal reporting purposes and eCenter publishing purposes.

When an existing contact (i.e. somebody that already has a contact record in WebCATS) logs into eCenter and registers for a training event, eCenter adds the contact to the conference's attendee list and notifies you of the attendee list update. If someone brand

new to your program registers for a training event, eCenter prompts the registrant for limited company and contact information. This information is uploaded to your WebCATS database as a pending contact record. As with the new records generated by online client sign-ups, this contact record isn't formally added to the database until you approve it.

See eCenter Direct in action! Call us for a guest account user name and password.



Step 1: Create the conference record in WebCATS

Conference Detail Refresh Attendee Count/Fees

Conference ID: 090047 SBA888? No

Title: Growing Your Business in a Tough Economy

Description: Marketing tactics to help you not only weather tough economic times, but flourish!

Training Topic(s): Marketing/Sales

Training Starts: 5/12/2010 Training Ends: 5/12/2010

Date Approved: 4/7/2010 Registration Deadline: 5/10/2010

Total Hours: 8

Conference Status: Open Maximum Number of Attendees: 15

Allow Waitlist?: Yes

Location of Training: 1523 Ming Ave., Bakersfield, CA 93304

County:

Instructors/Personnel

Kyle Carson (805) 982-3487 (w) outreach@cvsbdc.edu

Center Information

Participating Resources: <none>

eCenter

Post this conference on eCenter? Yes [Public Link]

Expose (full) fee on eCenter? Yes

Publishing Center: Central Valley SBDC (CENTRAL)

Scheduled Time(s): 8:00 am - 5:00pm

Conference Contact: Ynez Luz de Cielo

Phone: (805) 254-3265

E-mail: outreach@cvsbdc.edu

Online Payment: PayPal: accounting@cvsbdc.edu

Additional Information/Instructions for Prospective Attendees: Just bring yourself! We'll provide all necessary materials.

Attendee List

Attendees

Fees and Income

User-Defined Fields

Attached Documents

Survey Information

Reportable? Yes

Entered: 10/6/2009 9:33:09 AM by micbaek

Last Edited: 4/6/2010 4:28:05 PM by sbdc

To publish an event on eCenter, you must complete the fields under the conference record's eCenter heading.

Step 2: Attendees sign up and pay for event on eCenter

Training Events Calendar

The search filter below can be used to find upcoming events being hosted throughout the Network. You may use any combination of parameters (Center, Keyword, Topics, Dates, Status) to locate events that you might be interested in.

Sort by: Start Date

Center: (All Centers)

Keyword Search:

Topic: (All Topics)

Start Date Range: 4/6/2010 to 4/6/2011

Event Status: All Events

Growing Your Business in a Tough Economy

Event Status: Open Event Fee: \$150.00

Event Date: 5/12/2010 Register By: 5/10/2010

Time: 8:00 am - 5:00 pm

Event Location: 1523 Ming Ave., Bakersfield, CA 93304

Description: Marketing tactics to help you not only weather tough economic times, but flourish!

Business Law For Small Business

Event Status: Open

Event Date: 6/17/2010

Time: 8:00 am - 5:00 pm

Event Location: 911 Olive Street, Santa Barbara, CA 93101-1406

Description: Learn how to confront legal matters head on while operating a small business

Starting a Home-Based Business

Event Status: Open Event Fee: \$35.00

Event Date: 8/10/2010 Register By: 8/8/2010

Time: 6-9 p.m.

Event Location: 911 Olive St., Santa Barbara, CA 93101-1406

Description: Dr. Graff explains the ins and outs of starting a business in your home.

eCenter users can browse, register, and even pay for training events online.

Step 3: Approve registration request in WebCATS

Conference Sign-up Detail Accept to Waitlist Accept Reject Duplicate

Conference Title: Growing Your Business in a Tough Economy There are currently 6 people in the attendee list.

Start/End Date(s): 5/12/2010 - 5/12/2010 Status: Open

Request Number: 10324 Request Status: New Request

Name: Carson, Melvin G.

Company: Melvin's Mutts

Date Established: 3/22/2008

Address: 302 W Sola Street, Santa Barbara, CA 93101

E-mail: m.carson@gmail.com

Interested in receiving mass mailings? No

Primary Phone: (805) 882-2381 Cell Phone:

Questions/Notes:

SBA Data

Gender: Male

Race: White/Caucasian

Hispanic Origin: Hispanic

Veteran Status: Non-veteran

Reservist Status: None

Disabled?: No

Center: Central Valley SBDC (CENTRAL)

Entered: 4/6/2010 4:01:38 PM by eCenter (m.carson@gmail.com)

Last Edited: 4/6/2010 4:51:45 PM by sbdc

If the registrant is brand new to your center, you'll need to approve the request from the resulting conference request record. Once approved, WebCATS automatically creates a contact record for the registrant.

Client Sign-Up

Event Registration

Survey Completion

Account Management

Introduction

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Core Functions

Central Coast Development Centers

Hello, Melvin! Thank you for visiting eCenter Direct.

Training Events
Library of Documents
Network of Centers
Useful Links
Small Business Admin
APTAC
CA Chamber of Commerce
OutreachSystems
Softshare, Inc.
Ongoing Surveys:
Client Satisfaction Survey
Log out of eCenter

1. Would you recommend the services of our center to other small businesses?
 Yes
 No

2. Please explain why you would or wouldn't recommend our services.:

3. How would you rate the services of our center overall?
 Excellent
 Good

4. Has your company had any changes in the number of full-time employees, and 1
 Has this changed? Yes No

5. Did you win any prime and/or sub-contracts last quarter? Yes No

6. Did you obtain any loans last quarter?

Surveys can be marked as ongoing, as shown here, or one time. Ongoing surveys remain available indefinitely and can serve as reminders for clients to upload milestone data such as employee numbers, loans, awards, and so on.

When a client indicates recent awards won, as depicted here, eCenter prompts them for additional information. If the client had indicated a loan obtained, additional survey questions would have displayed for this topic as well.

Contract Award Information Entry

Please enter the appropriate information in each field; all fields are required.

Contract Type:

Award Date:

Agency/Prime Contractor Name:

Agency Type:

Contract Number:

Contract Value:

Number of Awards:

Online Survey Completions

eCenter Direct automates the distribution and collection of surveys. Simply create the survey in WebCATS, post it to eCenter, then generate a mass e-mail to your intended respondents asking them to log into eCenter to take the posted survey. A center can have an unlimited number of surveys available to an unlimited number of designated respondent groups at any time. When a contact responds to a survey via eCenter, the responses are uploaded to WebCATS as survey response records.

Client Surveys

You can create surveys that are restricted to clients only. Client surveys are unique in that they support a number of standardized milestone questions that you can include, along with any custom questions you create. When a client enters milestone data into a survey, the data is uploaded to WebCATS as milestone records.

You can also designate client surveys to appear immediately after someone signs up as a client from eCenter. In this capacity, the survey becomes a client intake survey and serves to help you better understand the needs of new clients.

Conference Surveys

You can create conference surveys intended solely for the attendees associated with particular conference records. eCenter supports pre- and post-conference surveys.

Contact Surveys

Contact surveys can be opened up to any contact in the WebCATS database, regardless of whether the contact is associated with a client record.

- Training Events
- Your Training Events**
 - 5/12/2010: Growing Your...
- Library of Documents
- Network of Centers
- Useful Links
 - Small Business Admin
 - APTAC
 - CA Chamber of Commerce
 - OutreachSystems
- Your Uncompleted Surveys:**
 - Training Evaluation Survey
- Log out of eCenter

Welcome to eCenter Direct

Before proceeding, please check the left-hand menu to see if you have any outstanding surveys requiring completion! Surveys provide important feedback for our program's continued improvement as well as funding and we appreciate your response.

Please help us keep our records current by reviewing and editing your account information.

| Contact Information | Company Information |
|--|--|
| Mr. Melvin K. Carson 302 West Sola Street, Santa Barbara, CA 93101 County: Santa Barbara | Melvin's Mutts 302 West Sola Street, Santa Barbara, CA 93101 County: Santa Barbara |
| (805) 882-2381 (work) (805) 882-7099 (home) | (805) 882-2381 (primary) |
| m.carson@gmail.com Password: ***** | m.carson@gmail.com |
| <hr style="width: 100%;"/> | <hr style="width: 100%;"/> |
| Get E-mail Updates? No | Get E-mail Updates? No |

For further assistance please contact:

John Waters
Santa Barbara Center
805-291-2982
johnw@sbc.edu

Online Account Management

When a contact logs into eCenter Direct, they see a user home page unique to their account and activities. From this page, a contact can send you account information updates, respond to surveys you've assigned to them, see the training events they're registered for, and view the documents that you've published for them.

This is the home page for Melvin Carson, the primary contact for Melvin's Mutts. As his left-hand menu indicates, Mr. Carson is registered for one upcoming training event and has one outstanding survey to complete.

eCenter Direct Home Page for Logged In Users