

# SBA – ‘The Window’

Microsoft Dynamics CRM 4.0  
CRM for Outlook

Proof of Vision Representative Screen Shots



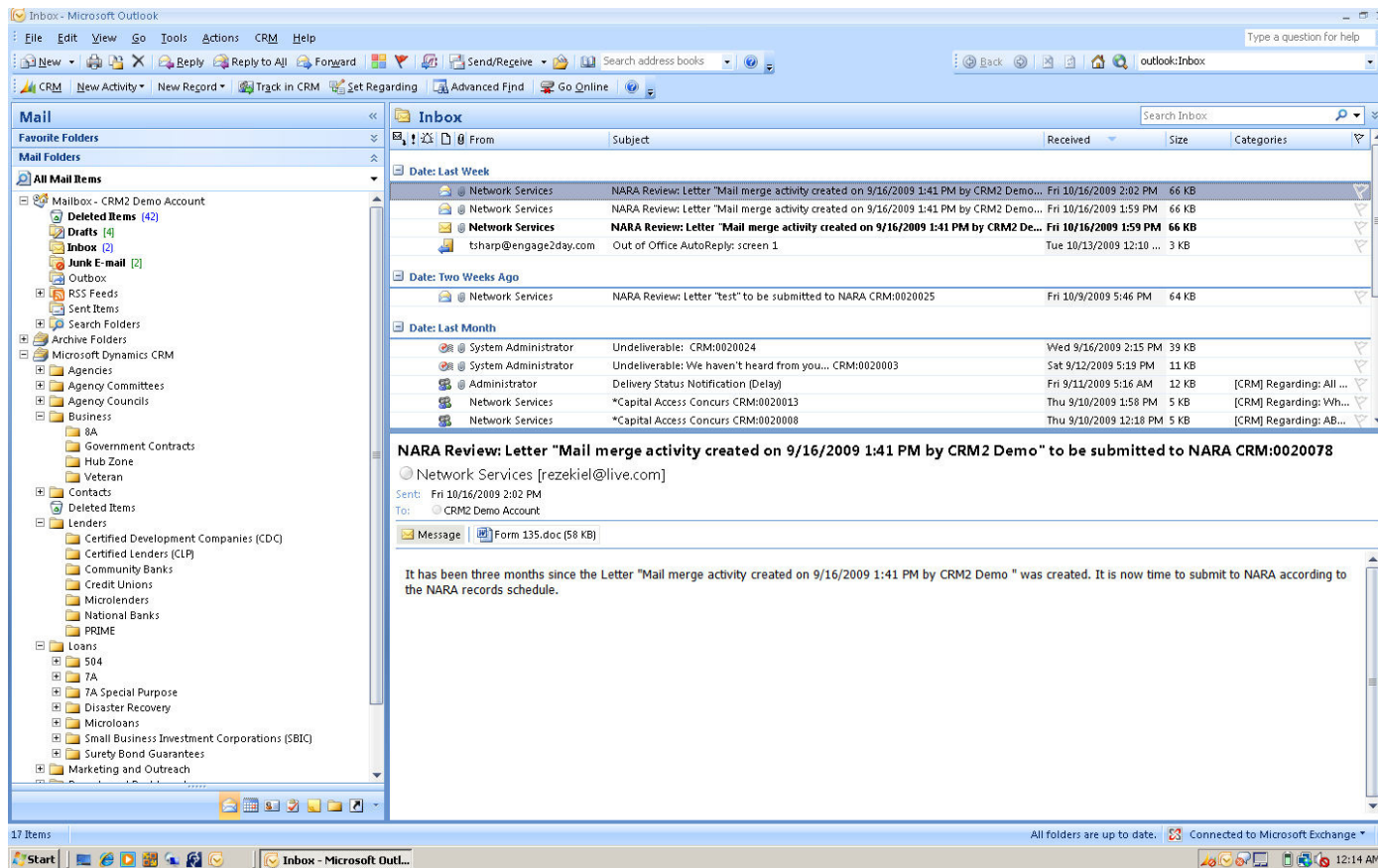
Mission Critical

Commerce

Communication

Continuity

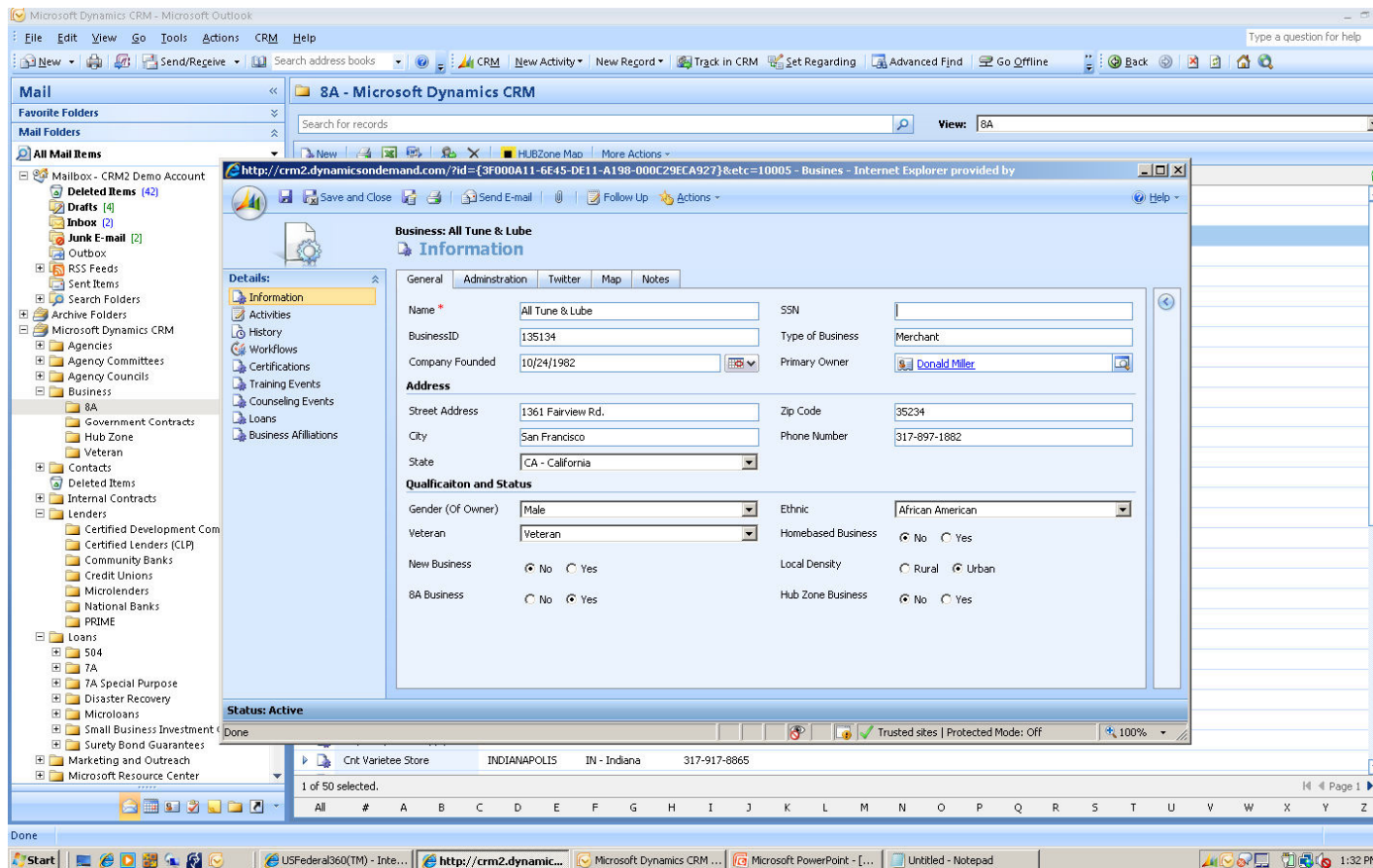
# Microsoft Outlook Integration



CRM is easy to use and navigate with a built-in folder structure that has been customized to SBA's loan program organization, small business certification and other important criteria.

E=MC<sup>4</sup>

# Microsoft Outlook Integration - II



Review Businesses, contact and lender information all from within easily-navigable forms opened in Outlook.



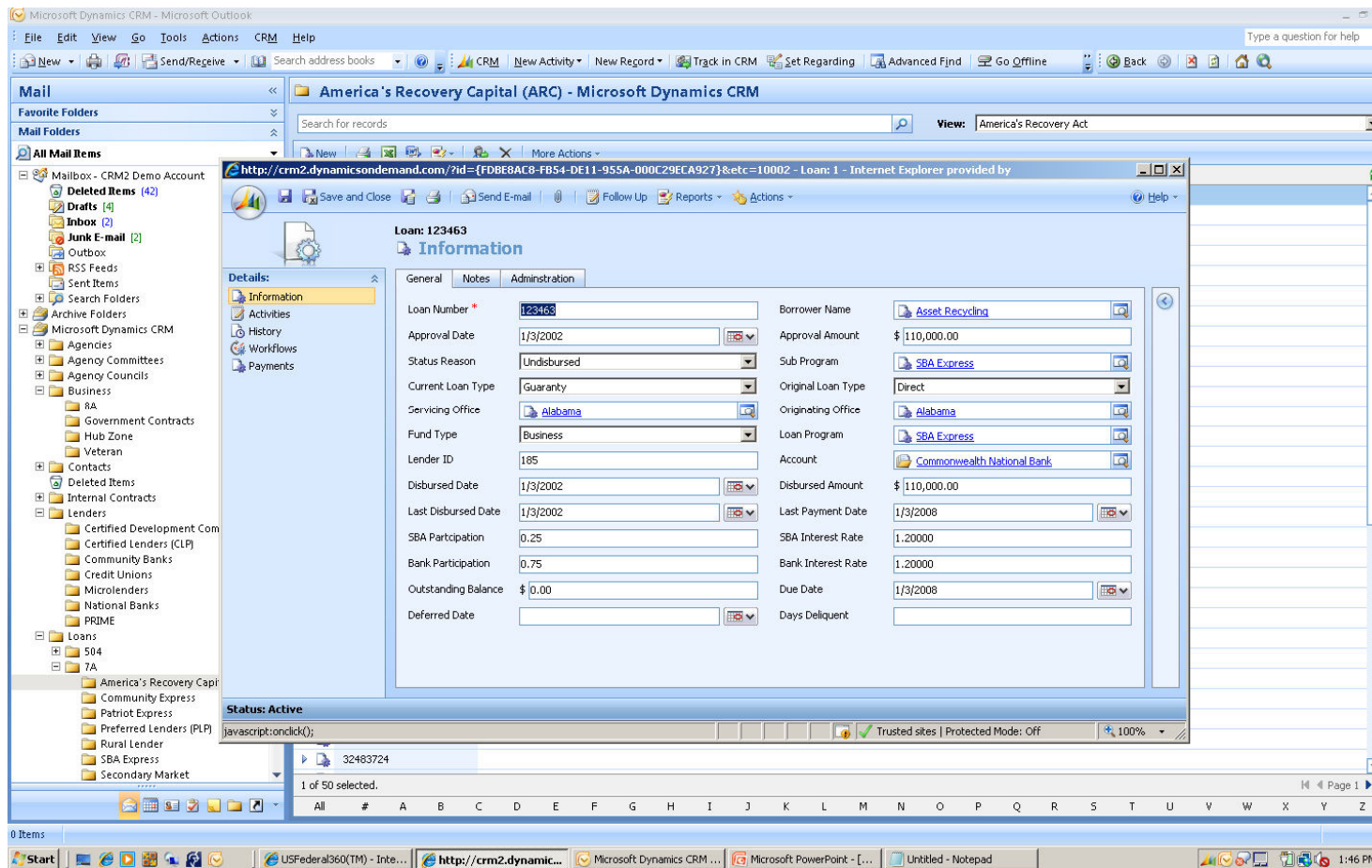
Mission Critical

Commerce

Communication

Continuity

# Microsoft Outlook Integration - III



Move quickly through data with drill downs and click through capabilities.  
 For example, records are easily moved from a loan record into a borrower or lender record.

E=MC<sup>4</sup>





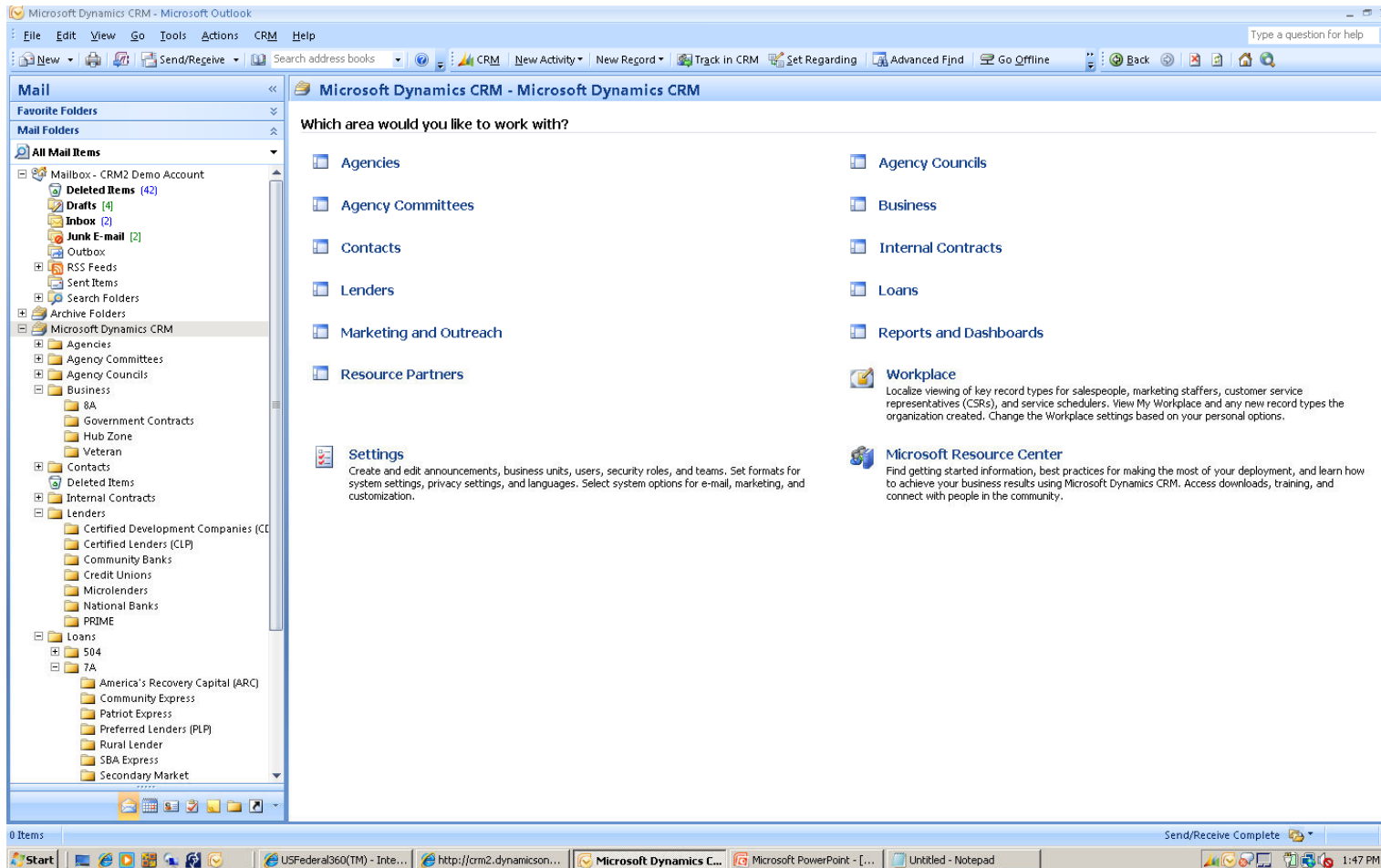
Mission Critical

Commerce

Communication

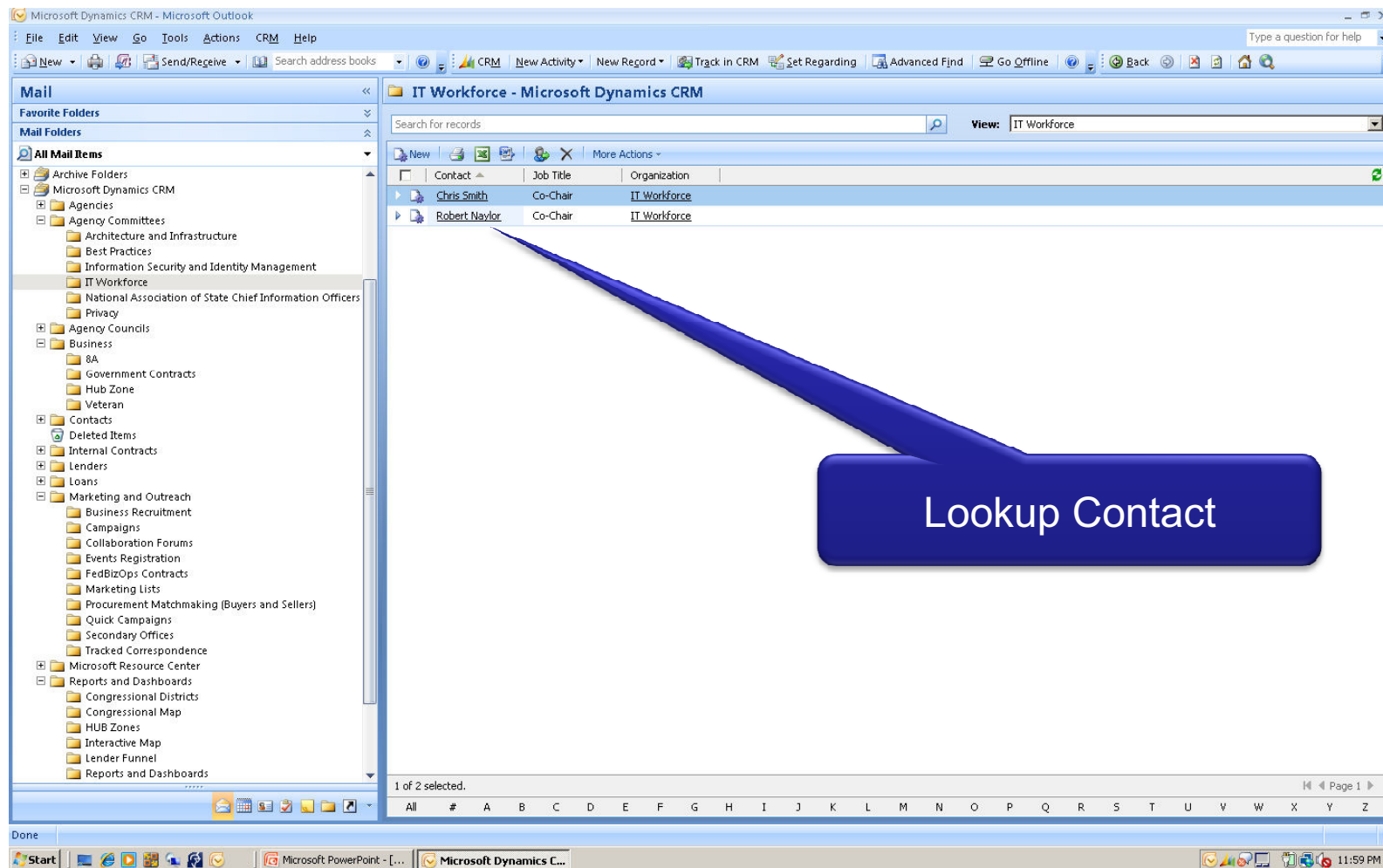
Continuity

# Agencies, Businesses & Contacts Robust Relationship Management



E=MC<sup>4</sup>

# Agencies, Committees & Contacts - I



The screenshot shows the Microsoft Dynamics CRM interface within Microsoft Outlook. The left sidebar displays a hierarchy of folders, including 'Agencies', 'Agency Committees', and 'IT Workforce'. The main pane shows a table of contacts with the following data:

Contact	Job Title	Organization
Chris Smith	Co-Chair	IT Workforce
Robert Naylor	Co-Chair	IT Workforce

A blue arrow points from the 'Robert Naylor' contact entry to a blue button labeled 'Lookup Contact'.



Mission Critical

Commerce

Communication

Continuity

# Agencies, Committees & Contacts - II

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The left sidebar shows a navigation tree with folders like 'Agencies', 'Agency Committees', and 'IT Workforce'. The main window shows the 'Organizational Affiliation: Information' form for a contact named Robert Naylor, who is the Co-Chair of IT Workforce. The form includes fields for Job Title, Contact, Frequency, Address (Street, City, Building, State, Zip, Room), and Owner (CRM2.Demo). A blue arrow points from a callout box labeled 'Pull-up Contact Details' to the contact information form.

E=MC<sup>4</sup>

+1.404.223.6350

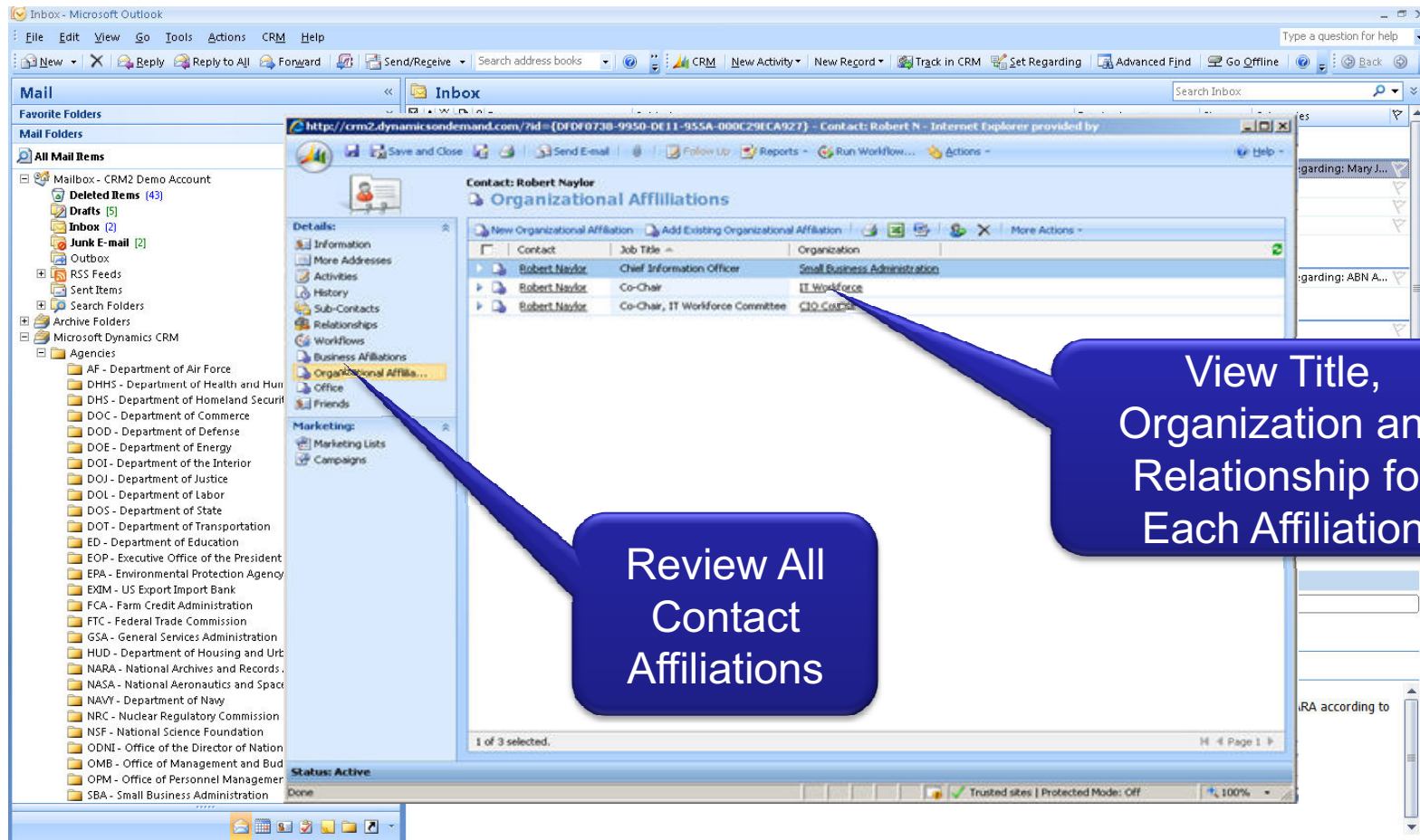
www.engage2day.com

info@engage2day.com

7

Copyright © 2009 - Engage, Inc. All Rights Reserved

# Agencies, Committees & Contacts - III



The screenshot shows the Microsoft Outlook CRM interface. On the left, a tree view lists various agencies under the 'Agencies' folder, including the Department of Air Force, Department of Health and Human Services, Department of Homeland Security, Department of Commerce, Department of Defense, Department of Energy, Department of the Interior, Department of Justice, Department of Labor, Department of State, Department of Transportation, Department of Education, Executive Office of the President, Environmental Protection Agency, US Export Import Bank, Farm Credit Administration, Federal Trade Commission, General Services Administration, Department of Housing and Urban Development, National Archives and Records Administration, National Aeronautics and Space Administration, Department of Navy, Nuclear Regulatory Commission, National Science Foundation, Office of the Director of National Intelligence, Office of Management and Budget, Office of Personnel Management, and Small Business Administration. The main window displays the 'Organizational Affiliations' for contact Robert Naylor. A table lists three affiliations:

Contact	Job Title	Organization
Robert Naylor	Chief Information Officer	Small Business Administration
Robert Naylor	Co-Chair	IT Workforce
Robert Naylor	Co-Chair, IT Workforce Committee	CIO Council

Two blue callout boxes are overlaid on the screenshot. The first box, pointing to the 'Organizational Affiliations' table, contains the text: 'Review All Contact Affiliations'. The second box, pointing to the table rows, contains the text: 'View Title, Organization and Relationship for Each Affiliation'.





Mission Critical

Commerce

Communication

Continuity

# Agencies, Committees & Contacts - IV

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The left-hand navigation pane shows a tree view of folders, including 'Contacts'. A blue callout box with white text points to this folder, stating 'View All Contacts by Agency'. The main window shows the 'Organizational Affiliation: Information' form for a contact named 'Sr. Administrator'. The form includes fields for Job Title, Contact, Frequency, Address (Street, City, State, Zipcode, Building, Room), and Organization (Department of Agriculture). The status is 'Active'. The bottom of the screen shows a taskbar with the Start button and several open applications, including a browser window at 'http://crm2.dynamicsondemand.com'.

E=MC<sup>4</sup>

+1.404.223.6350

www.engage2day.com

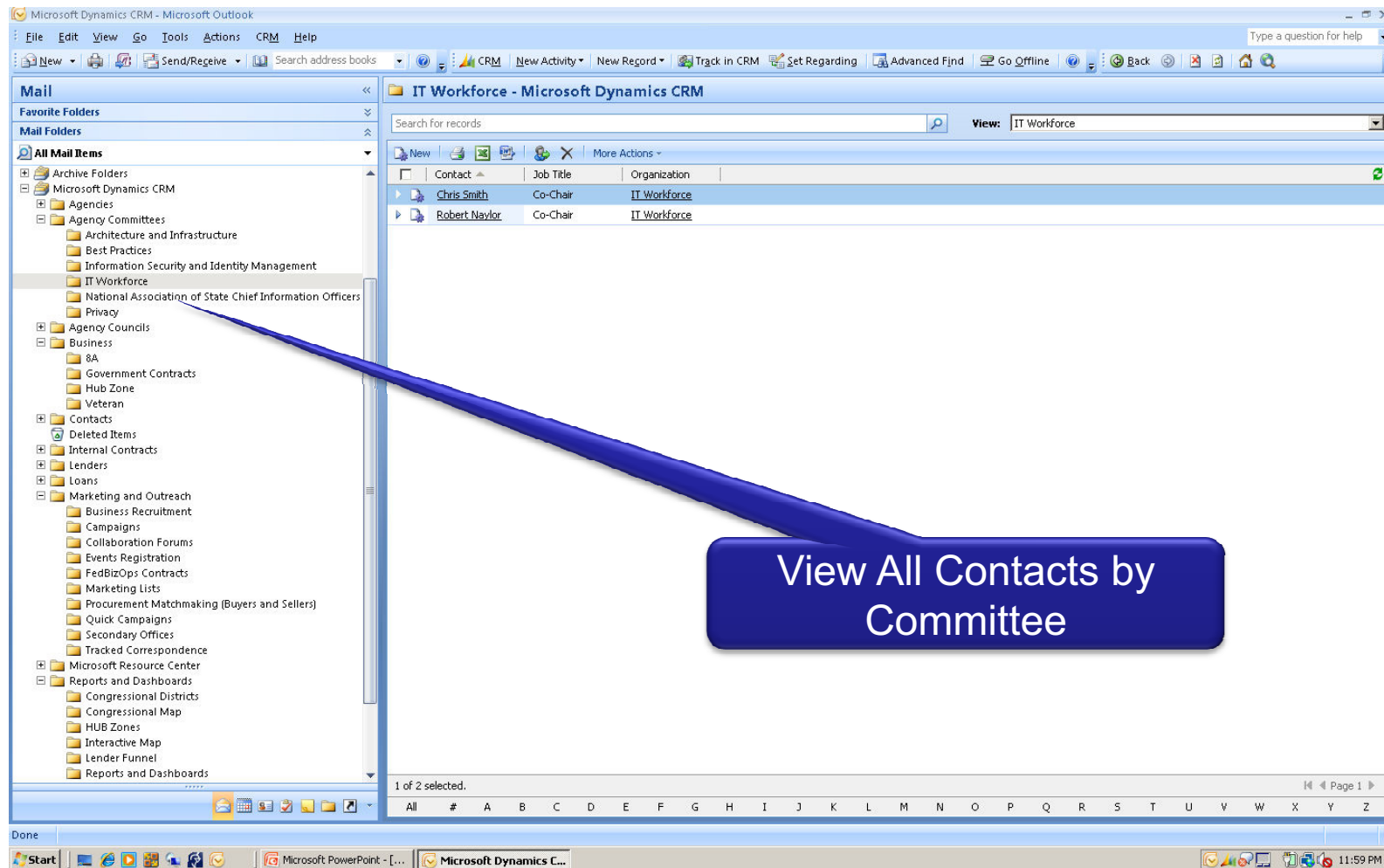
info@engage2day.com

8

Copyright © 2009 - Engage, Inc. All Rights Reserved



# Agencies, Committees & Contacts - V



The screenshot shows the Microsoft Dynamics CRM interface within Microsoft Outlook. The left-hand navigation pane displays a tree view of folders under 'Microsoft Dynamics CRM'. A blue arrow points from the 'IT Workforce' folder in this pane to a callout box. The main window displays a table of contacts for the 'IT Workforce' committee.

Contact	Job Title	Organization
Chris Smith	Co-Chair	IT Workforce
Robert Naylor	Co-Chair	IT Workforce

**View All Contacts by Committee**

# Agencies, Committees & Contacts - VI

The screenshot shows the Microsoft Dynamics CRM interface within Microsoft Outlook. The left sidebar displays a folder tree under 'Microsoft Dynamics CRM' with 'CIO Council' selected. The main pane shows a table of contacts for the CIO Council. A blue callout box with a white border and a blue arrow pointing to the 'CIO Council' column contains the text 'View Contacts by Council'.

Contact	Job Title	Organization
Andrea Norris	Council Member	CIO Council
Brook Colangelo	Council Member	CIO Council
Carol Staten	Council Member	CIO Council
Casey Coleman	council member	CIO Council
Charles McClam	Council Member	CIO Council
Chris Smith	Council Member	CIO Council
Cita Furlani	Ex-Officio	CIO Council
Daniel Cobter	Council Member	CIO Council
Danny Harris	Council Member	CIO Council
Darren Ash	CIO	CIO Council
David J. Molchan	Liason	CIO Council
David Wegnergren	Vice Chair	CIO Council
Frank B...	CIO	CIO Council
Gary Cox		CIO Council
George Strawn	CIO	
Jacquelyn Patillo	Council Member	CIO Council
Jeffrey Zienks	Executive Chair	CIO Council
Jerry Williams	Council Member	CIO Council
John Andre	Program Manager	CIO Council
John Teeter	Council Member	CIO Council
Karen L. Britton	Council Member	CIO Council
Linda Cureton	Council Member	CIO Council
Linda Travers	Council Member	CIO Council
Lynn Allen	Council Member	CIO Council
Margie Graves	Council Member	CIO Council
Martha Dorris	Liason	CIO Council
Michael Carleton	Council Member	CIO Council
Michael Duffy	Council Member	CIO Council
Michele Heffner	Director	CIO Council



Mission Critical

Commerce

Communication

Continuity

# Business Listings For All Available Data

The screenshot shows the Microsoft Dynamics CRM interface within Microsoft Outlook. The main window displays a list of business records under the 'Business - Microsoft Dynamics CRM' view. The records are sorted by Name and include columns for Name, City, State, and Phone Number. The left sidebar shows the 'Mail' folder structure, including 'All Mail Items' and 'Microsoft Dynamics CRM' sub-folders. The bottom status bar indicates '1 of 50 selected' and shows the current time as 1:48 PM.

Name	City	State	Phone Number
A1 Billard & Trophy Supply	San Francisco	CA - California	317-255-8682
A-Asen Lock & Safe Service	San Francisco	CA - California	317-257-8910
Abstract	San Francisco	CA - California	317-856-3710
Advanced Aquarium Technology	San Francisco	CA - California	317-254-8759
AJ&L Gift Baskets	San Francisco	CA - California	317-784-9961
Alexandria S Gift Basket	BEECH GROVE	IN - Indiana	317-781-8056
All Tune & Lube	San Francisco	CA - California	317-897-1882
Amazon Marketing	San Francisco	CA - California	317-354-9485
American Business Machines	San Francisco	CA - California	317-783-5639
Amro'S Used Appliance	San Francisco	CA - California	317-542-0855
Andrew Lanman	San Francisco	CA - California	317-237-3030
Ann'S	San Francisco	CA - California	317-549-6936
Another Time Antiques	San Francisco	CA - California	317-255-1277
Antique Helper	INDIANAPOLIS	IN - Indiana	317-202-9550
Antique Mall Of Irvington	INDIANAPOLIS	IN - Indiana	317-322-1970
Antiques & More	INDIANAPOLIS	IN - Indiana	317-542-8526
Ar Service Flag Pole Sales	INDIANAPOLIS	IN - Indiana	317-243-2876
Art Store	INDIANAPOLIS	IN - Indiana	317-253-7211
Artifacts Gallery	INDIANAPOLIS	IN - Indiana	317-255-1178
Artistic Awards Lser Specialsts	INDIANAPOLIS	IN - Indiana	317-297-1125
Ashley'S Gift & Basket	BEECH GROVE	IN - Indiana	317-788-6511
Asset Recycling	INDIANAPOLIS	IN - Indiana	317-635-7774
Associated Entertainment Services	INDIANAPOLIS	IN - Indiana	317-789-0112
Atlanta Journal Constitution	Atlanta	GA - Georgia	
Automobile Dealers Associatn Of In	INDIANAPOLIS	IN - Indiana	317-635-1441
Automy Distributors Warehouse	INDIANAPOLIS	IN - Indiana	317-377-0479
Back On The Bus	INDIANAPOLIS	IN - Indiana	317-253-6423
Ball Cards	INDIANAPOLIS	IN - Indiana	317-299-8594
Balloons By Design	INDIANAPOLIS	IN - Indiana	317-352-0576

E=MC<sup>4</sup>

+1.404.223.6350

[www.engage2day.com](http://www.engage2day.com)

[info@engage2day.com](mailto:info@engage2day.com)

11

Copyright © 2009 - Engage, Inc. All Rights Reserved



Mission Critical

Commerce

Communication

Continuity

# Business Segmentation by Type

Microsoft Dynamics CRM - Microsoft Outlook

File Edit View Go Tools Actions CRM Help

Search for records View: 8A

Name	City	State	Phone Number
Abstract	San Francisco	CA - California	317-856-3710
Advanced Aquarium Technology	San Francisco	CA - California	317-254-8759
All Tune & Lube	San Francisco	CA - California	317-897-1882
Amazon Marketing	San Francisco	CA - California	317-354-9485
American Business Machines	San Francisco	CA - California	317-783-5639
Another Time Antiques	San Francisco	CA - California	317-255-1277
Antique Mall Of Irvington	INDIANAPOLIS	IN - Indiana	317-322-1970
Art Store	INDIANAPOLIS	IN - Indiana	317-253-7211
Artifacts Gallery	INDIANAPOLIS	IN - Indiana	317-255-1178
Asset Recycling	INDIANAPOLIS	IN - Indiana	317-635-7774
Associated Entertainment Services	INDIANAPOLIS	IN - Indiana	317-789-0112
Automobile Dealers Associatn Of In	INDIANAPOLIS	IN - Indiana	317-635-1441
Automty Distributors Warehouse	INDIANAPOLIS	IN - Indiana	317-377-0479
Back On The Bus	INDIANAPOLIS	IN - Indiana	317-253-6423
Ball Cards	INDIANAPOLIS	IN - Indiana	317-299-8594
Balloons By Design	INDIANAPOLIS	IN - Indiana	317-352-0576
Beer & Nuts Shop	INDIANAPOLIS	IN - Indiana	317-423-0747
Berkshire Florist	INDIANAPOLIS	IN - Indiana	317-243-4245
Blow'S Variety	INDIANAPOLIS	IN - Indiana	317-924-3178
Brickyard Authentics	INDIANAPOLIS	IN - Indiana	317-241-1500
Brookstone	INDIANAPOLIS	IN - Indiana	317-624-9117
Byers Electric Service	INDIANAPOLIS	IN - Indiana	317-634-7268
Capital Gifts & Goodies	INDIANAPOLIS	IN - Indiana	317-631-2065
Chelsea'S	INDIANAPOLIS	IN - Indiana	317-251-0600
Chuck Sampson'S Trophy House	INDIANAPOLIS	IN - Indiana	317-782-3779
Circle City Books	INDIANAPOLIS	IN - Indiana	317-353-0572
Circle City Christian Center	INDIANAPOLIS	IN - Indiana	317-631-0685
City Blueprint & Supply	INDIANAPOLIS	IN - Indiana	317-484-0865
Cnt Varietee Store	INDIANAPOLIS	IN - Indiana	317-917-8865

1 of 50 selected.

Start | USFederal360(TM) - Inte... | Microsoft Dynamics C... | Microsoft PowerPoint - [...]

1:59 PM

E=MC<sup>4</sup>

+1.404.223.6350

www.engage2day.com

info@engage2day.com

12

Copyright © 2009 - Engage, Inc. All Rights Reserved





Mission Critical

Commerce

Communication

Continuity

# Relationship Detail

## Any Organization via One Click

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The main window shows the 'Business: Antique Helper' information form. The form is divided into several sections:

- General:** Name (Antique Helper), SSN (484-35-6257), BusinessID (3456902), Type of Business (Merchant), Company Founded, Primary Owner.
- Address:** Street Address (1111 Main Street), Zip Code, City (INDIANAPOLIS), State (IN - Indiana), Zip Code Number (317-202-9550).
- Qualification and Status:** Gender (Of Owner) (Male), Ethnic (Hawaiian or Pacific Islander), Veteran (Veteran), Homebased Business (No/Yes), New Business (No/Yes), Local Density (Rural/Urban), 8A Business (No/Yes), Hub Zone Business (No/Yes).

The status is 'Active'. The interface also shows a mail folder pane on the left and a taskbar at the bottom.

E=MC<sup>4</sup>

+1.404.223.6350

[www.engage2day.com](http://www.engage2day.com)

[info@engage2day.com](mailto:info@engage2day.com)

13

Copyright © 2009 - Engage, Inc. All Rights Reserved





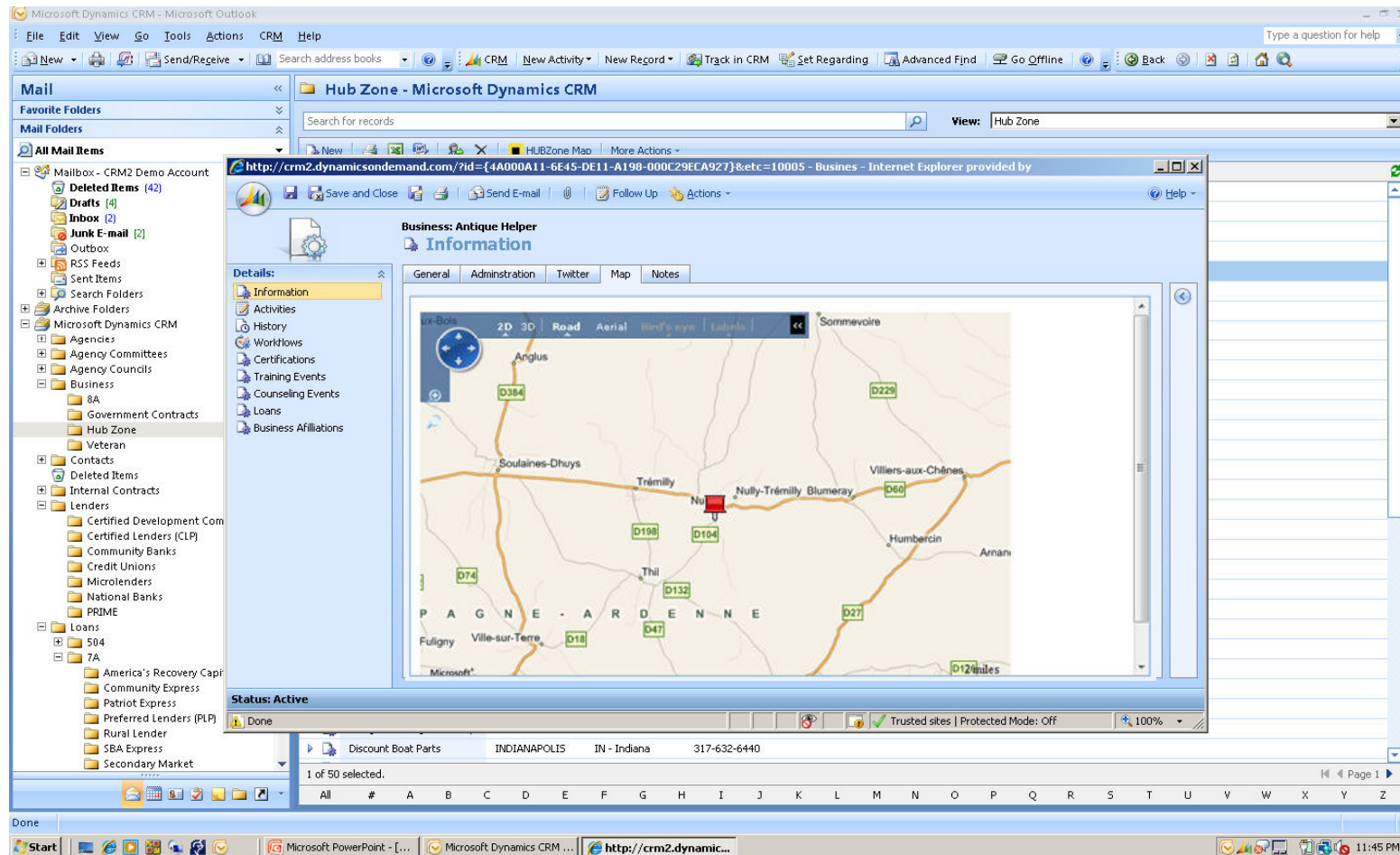
Mission Critical

Commerce

Communication

Continuity

# Robust Tools Integrated within Outlook Mapping and Data Visualization Tools



E=MC<sup>4</sup>

+1.404.223.6350

[www.engage2day.com](http://www.engage2day.com)

[info@engage2day.com](mailto:info@engage2day.com)

15

Copyright © 2009 - Engage, Inc. All Rights Reserved



Mission Critical

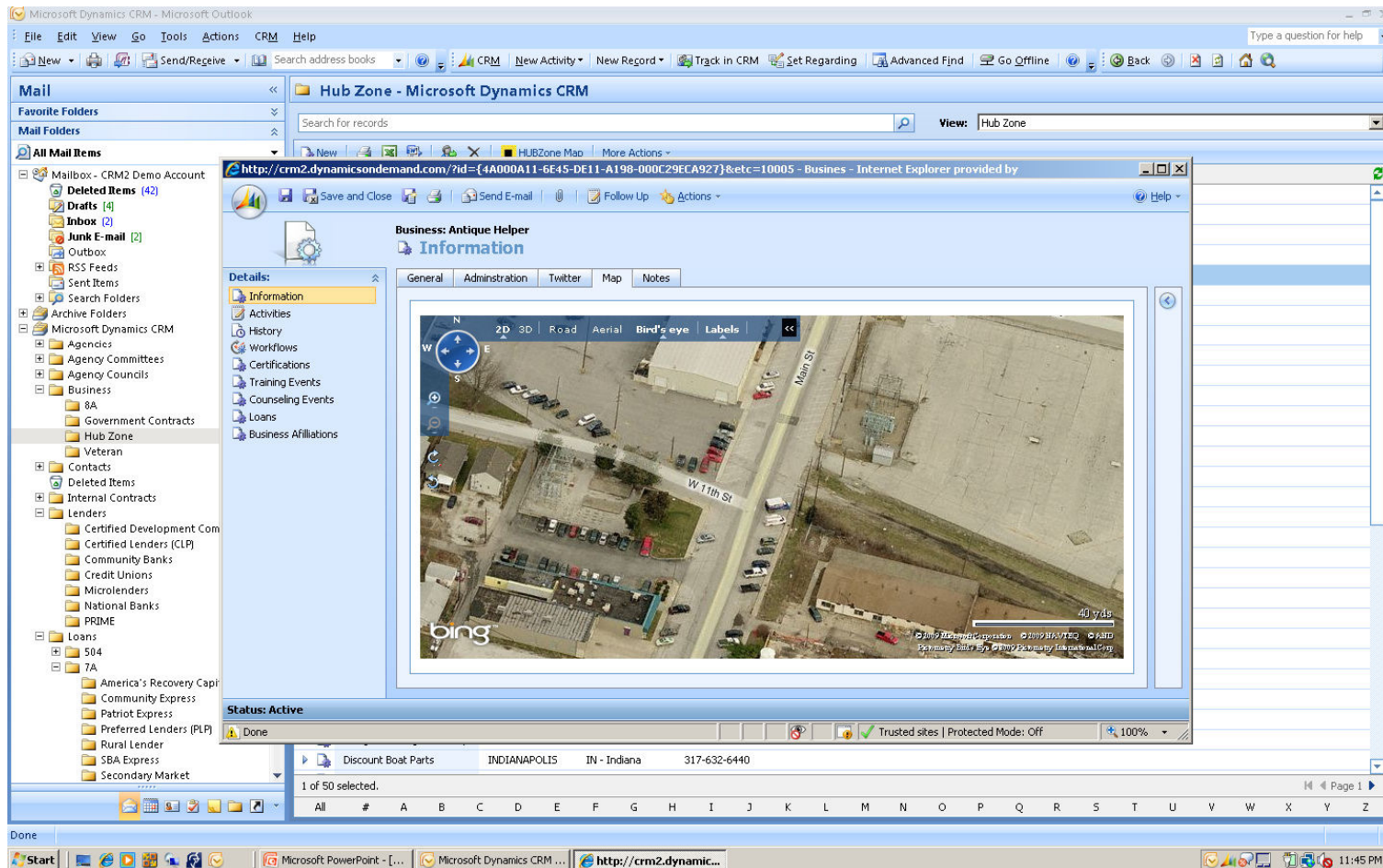
Commerce

Communication

Continuity

# Robust Tools Integrated within Outlook

## Satellite Imagery and Geographic Perspective



E=MC<sup>4</sup>

+1.404.223.6350

[www.engage2day.com](http://www.engage2day.com)

[info@engage2day.com](mailto:info@engage2day.com)

15

Copyright © 2009 - Engage, Inc. All Rights Reserved

# Robust Tools Integrated within Outlook

## Granular Details and Preferences Available by Relationship

The screenshot displays the Microsoft Outlook CRM interface. The main window shows a contact record for '8A - Microsoft Dynamics CRM'. The 'Information' tab is selected, showing contact methods and marketing preferences. The 'Marketing Information' section includes options for sending marketing materials and preferred service details. The 'Service Preferences' section includes fields for preferred time and day. The 'Marketing Lists' section includes a field for preferred facility/equipment. The 'Status' is set to 'Active'.

Company Name	Address	City	State	Phone Number
Circle City books	INDIANAPOLIS	IN - Indiana	317-533-0372	
Circle City Christian Center	INDIANAPOLIS	IN - Indiana	317-631-0685	
City Blueprint & Supply	INDIANAPOLIS	IN - Indiana	317-484-0865	

# Agency Related Asset & Operating Information Summary Views

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The main window shows a list of 'Preferred Lenders (PLP) - Microsoft Dynamics CRM'. The list includes columns for Lender Name, Main Phone, Address 1: City, Address 1: State, Primary Contact, and E-mail (Primary Contact). The 'Preferred Lenders (PLP)' folder is selected in the left-hand navigation pane.

Lender Name	Main Phone	Address 1: City	Address 1: State	Primary Contact	E-mail (Primary Contact)
1St Source Bank		INDIANAPOLIS	IN - Indiana		
Abd Federal Credit Union		INDIANAPOLIS	IN - Indiana		
ABN AMRO Bank N.V.		Amsterdam	Noord-Holland		
acme	1234567890			Mary Jane Smith	noemail@anywhere.com
Affinity Bank		VENTURA	CA		
Alamosa State Bank		ALAMOSA	CO		
Alcon Empl FCU		FORT WORTH	TX		
Alliant Bank		ALEXANDER CITY	AL		
All Seasons Federal Credit Union		INDIANAPOLIS	IN - Indiana		
Allied Banking Corporation		Metropolitan Ma...			
Allied CU		JACKSON	AL		
Allied Irish Banks plc		Dublin	County Dublin		
Allisonville Banking Center		INDIANAPOLIS	IN - Indiana		
Alpena-Alcona Area CU		ALPENA	MI		
Alterman Empl FCU		Opa-Locka	FL		
AMCORE Bank, National Association		Rockford	IL		
Ameriana Bank Of Indiana		AVON	IN - Indiana		
AmerianIndiana		AVON	IN - Indiana		
American Express Bank Ltd		NEW YORK CITY	NY		
American Gateway Bank		BATON ROUGE	LA		
American National Bancorp, Inc.		Lawton	OK		
American States Employee Federal Cu		INDIANAPOLIS	IN - Indiana		
Americana Bank & Trust		NEW PALESTINE	IN - Indiana		
Aozora Bank, Ltd.		Tokyo	Tokyo		
Arab Bank Plc		Amman			
Arab Banking Corporation B.S.C.		Manama			
Archer Cooperative CU		ARCHER	NE	Rob Waterman	
Arkansas Diamond Bank					
Asian Development Bank		Metropolitan Ma...			





Mission Critical

Commerce

Communication

Continuity

# Agency Related Asset & Operating Information Detail Views

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The main window shows the 'Lender: Community National Bank' information page. The left sidebar contains a navigation tree with folders such as 'Agencies', 'Business', 'Lenders', and 'Loans'. The central pane is divided into tabs: 'Information', 'Details', 'Map', 'Administration', 'Attachments & Documents', 'Twitter', and 'Notes'. The 'Information' tab is active, showing fields for Lender Name, ID, Location ID, FIRS Number, Primary Category, Status Reason, Lender Type, Open Locations, Charter, Number of Subsidiaries, SBA Office, Key Owner, Legal Type, and Address. Below the form, there is a 'Marketing' section and a 'Status: Active' indicator. At the bottom, a table lists other lenders with columns for Name, City, and State.

Name	City	State
Community National Bank	ESCONDIDO	CA
Credit Union Center	INDIANAPOLIS	IN - Indiana
Denmark State Bank	DENMARK	WI

E=MC<sup>4</sup>





Mission Critical

Commerce

Communication

Continuity

# 'At a Glance' Quick Views For Interrelated Organizations

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The left-hand pane shows a navigation tree with folders such as Agencies, Business, Lenders, and Loans. The main window is titled 'Community Banks - Microsoft Dynamics CRM' and contains a table of bank records. The table has the following columns: Lender Name, Address 1: County, Address 1: City, Address 1: State, and Address Phone. The records include banks like Alamosa State Bank, American Express Bank Ltd, and Bank of America.

Lender Name	Address 1: County	Address 1: City	Address 1: State	Address Phone
Alamosa State Bank	ALAMOSA	CO		
All Seasons Federal Credit...	INDIANAPOLIS	IN - Indiana		317-248-9900
American Express Bank Ltd	NEW YORK CITY	NY		
Americana Bank & Trust	NEW PALESTINE	IN - Indiana		317-861-9400
Arkansas Diamond Bank				
Balcones Bank SSB				
Banca Commerciale Italiana	MILAN	MI		
Bank at Ormond-by-the-Sea				
Bank of Brewton	BREWTON	AL		
Bank of Central Florida				
Bank of Coronado				
Bank of England	ENGLAND	AR		
Bank of Jackson County	GRACEVILLE	FL		
Bank of Maryland	Rockville	MD - Maryland		111-222-3333
Bank of Sugar Grove				
Bank One	INDIANAPOLIS	IN - Indiana		317-321-3000
Bank One, National Associ...				
Bath Savings Institution	BATH	ME		
Bessemer Trust Company,...	NEW YORK CITY	NY		
Brown Brothers Harriman ...	NEW YORK CITY	NY		
Busey Bank	INDIANAPOLIS	IN - Indiana		317-574-1540
Business Bank of California				
Capital Bank	HOUSTON	TX		
Capital Plus Credit Union	INDIANAPOLIS	IN - Indiana		317-232-3852
Cassa Di Risparmio Delle P...				
Centra Credit Union	INDIANAPOLIS	IN - Indiana		317-542-6100
Central Bank	Russville	IN		
Central Federal Credit Union	INDIANAPOLIS	IN - Indiana		317-353-8045
Century National Bank				

E=MC<sup>4</sup>



Mission Critical

Commerce

Communication

Continuity

# One-Click Relationship-Based Navigation Click-through Hyperlinks

The screenshot displays the Microsoft Dynamics CRM interface within Microsoft Outlook. The main window shows a record for 'Community National Bank' under the 'Lender' entity. The 'Information' tab is active, showing fields for Lender Name, Lender ID (460), Location ID (5257), FIRS Number (A056375), Primary Category (Lending Institution), Status Reason (Open), Lender Type (Bank), Open Locations (0), Number of Subsidiaries (0), Engagement Tier (Tier 2), and Address (900 Canterbury Pl, ESCONDIDO, CA 92025). A 'Marketing' section is also visible with links for Marketing Lists and Campaigns. Below the form, a table lists other lenders:

Lender Name	City	State	Phone
Community National Bank	ESCONDIDO	CA	
Credit Union Center	INDIANAPOLIS	IN - Indiana	317-594-0134
Denmark State Bank	DENMARK	WI	

E=MC<sup>4</sup>



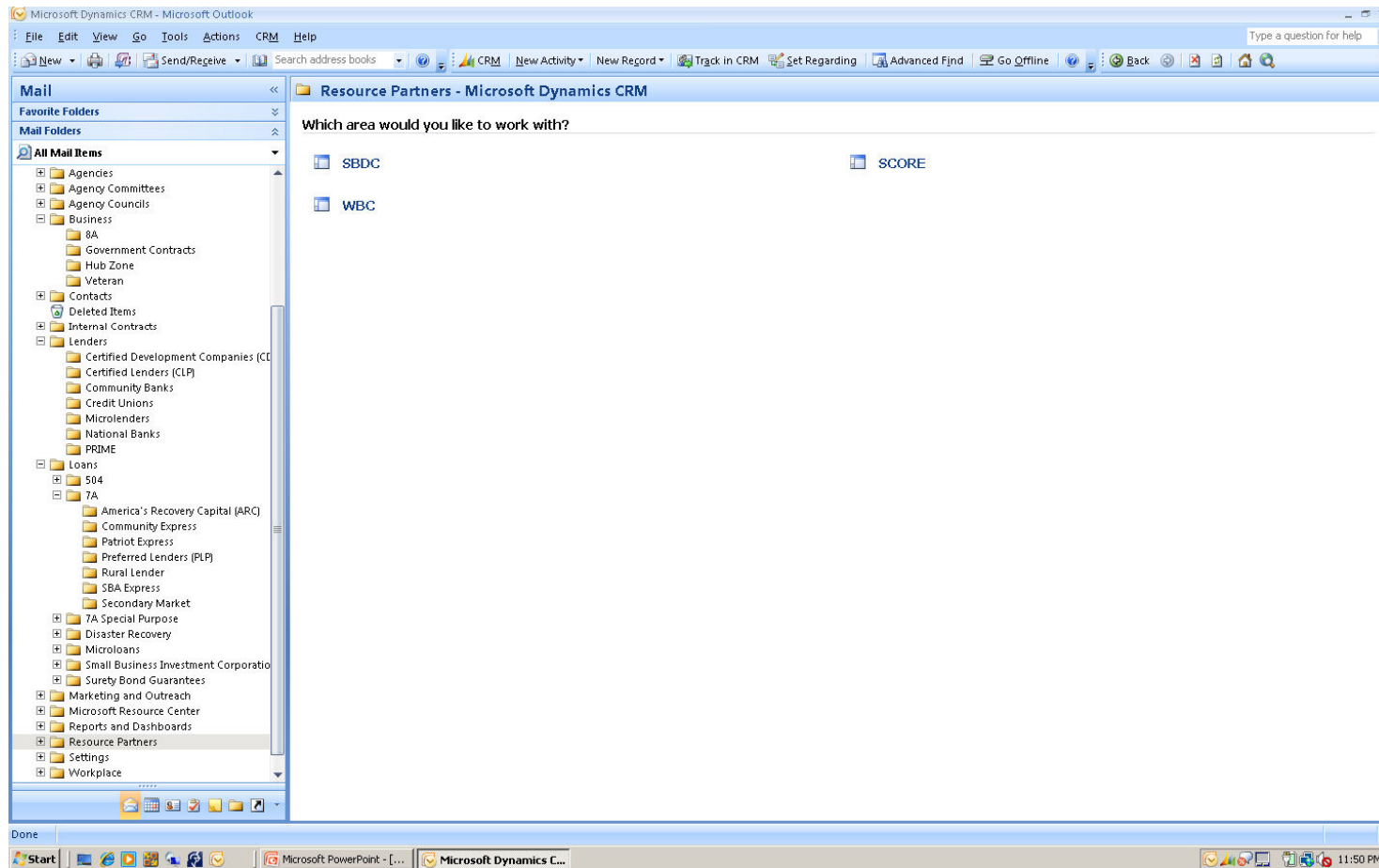
Mission Critical

Commerce

Communication

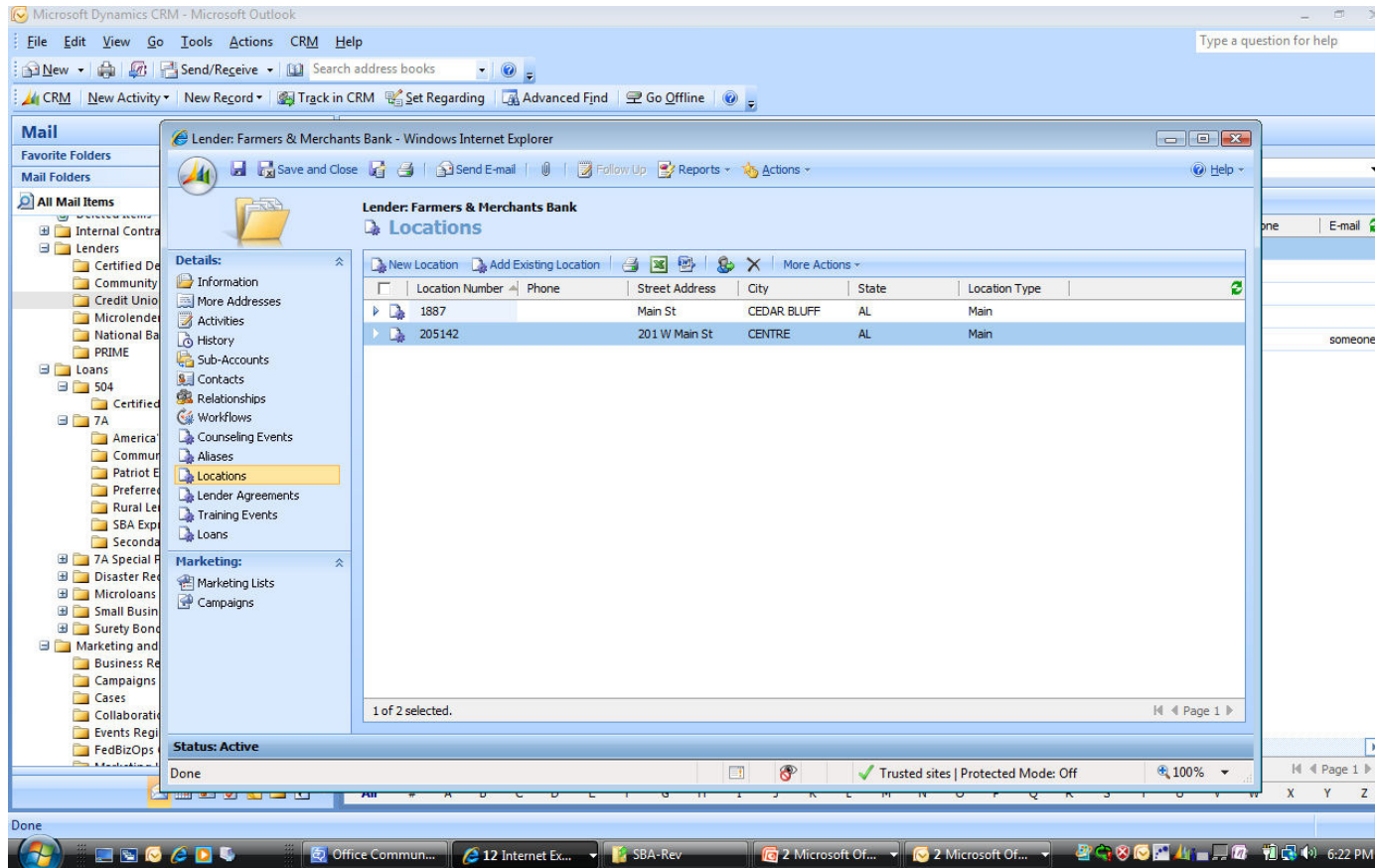
Continuity

# Resource Partners & Non-Federal, Affiliated Organizations



E=MC<sup>4</sup>

# Legacy Data & Functionality



Just as in PIMS, users can easily view the branch office and locations of lenders.





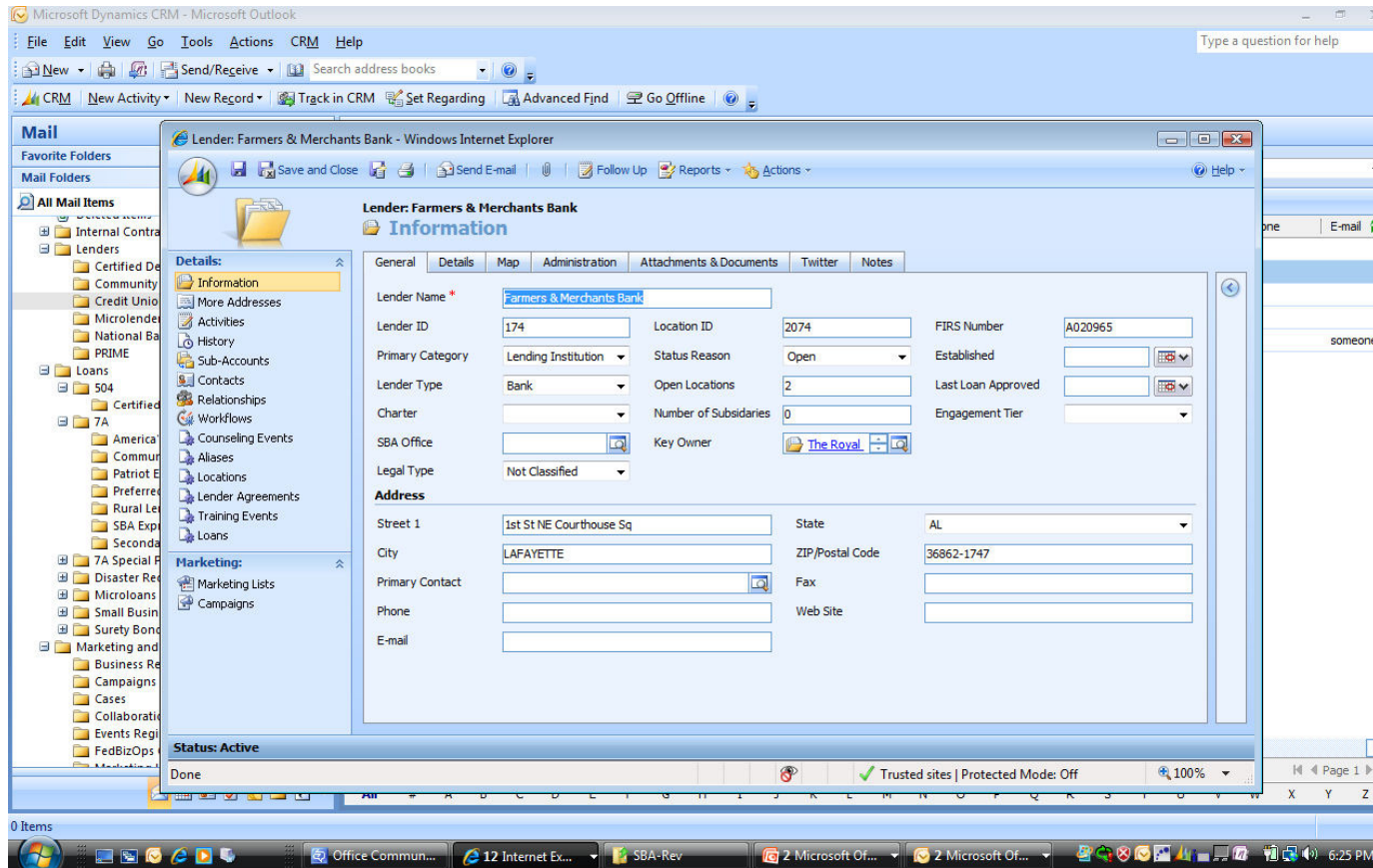
Mission Critical

Commerce

Communication

Continuity

# Legacy Data & Functionality

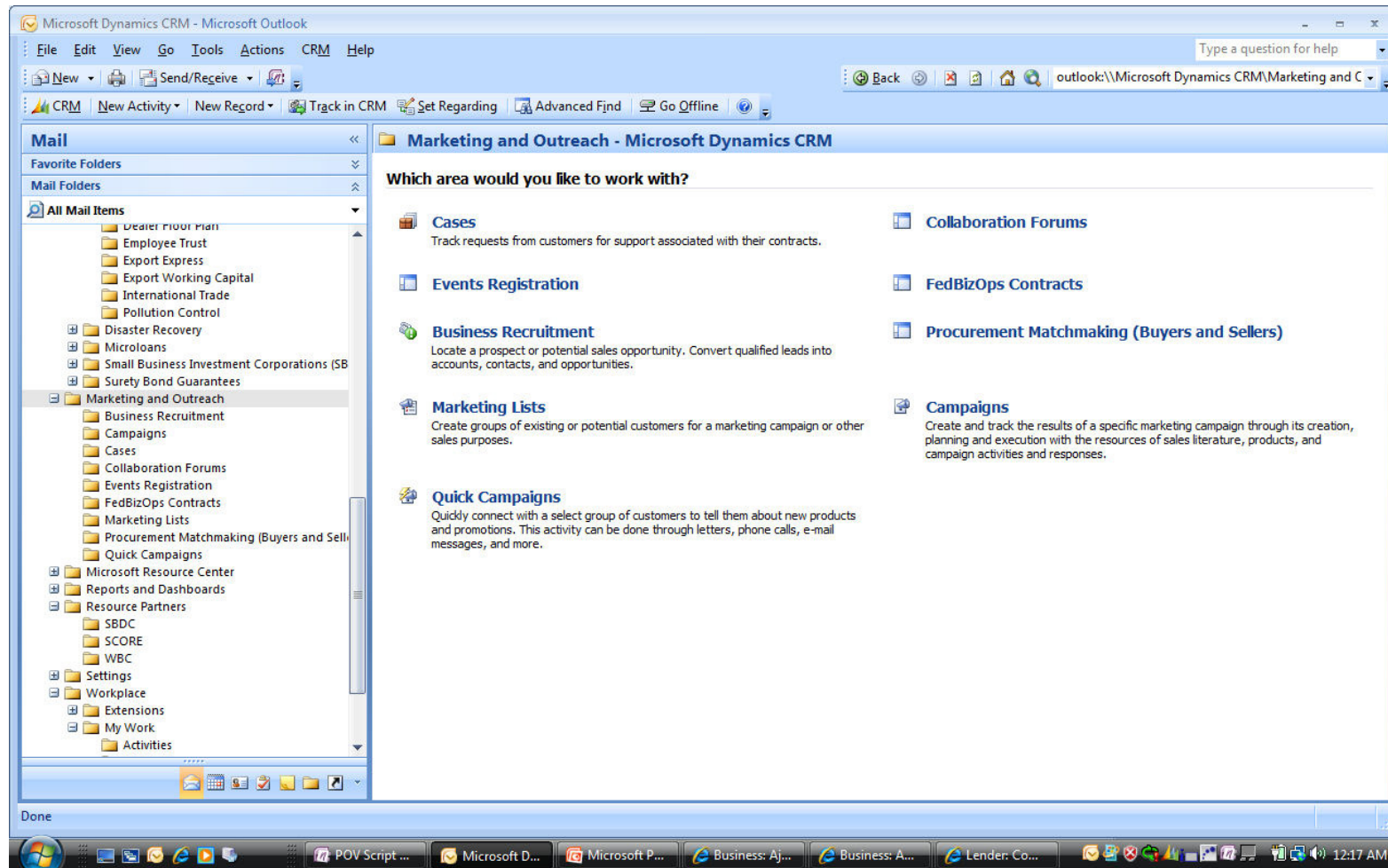


The CRM system has been designed to accommodate data from the PIMS system, ensuring no historical data will be lost.

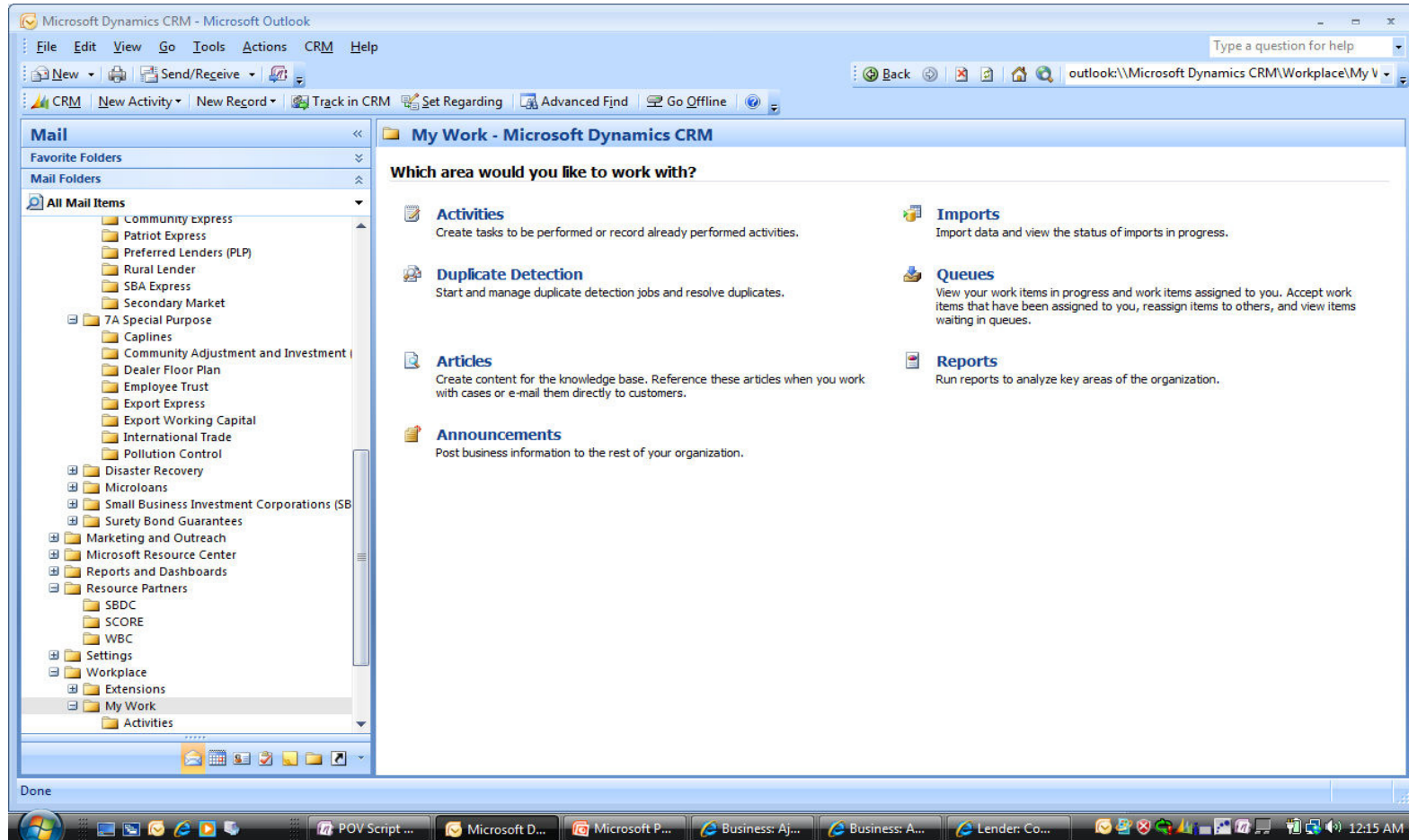
E=MC<sup>4</sup>



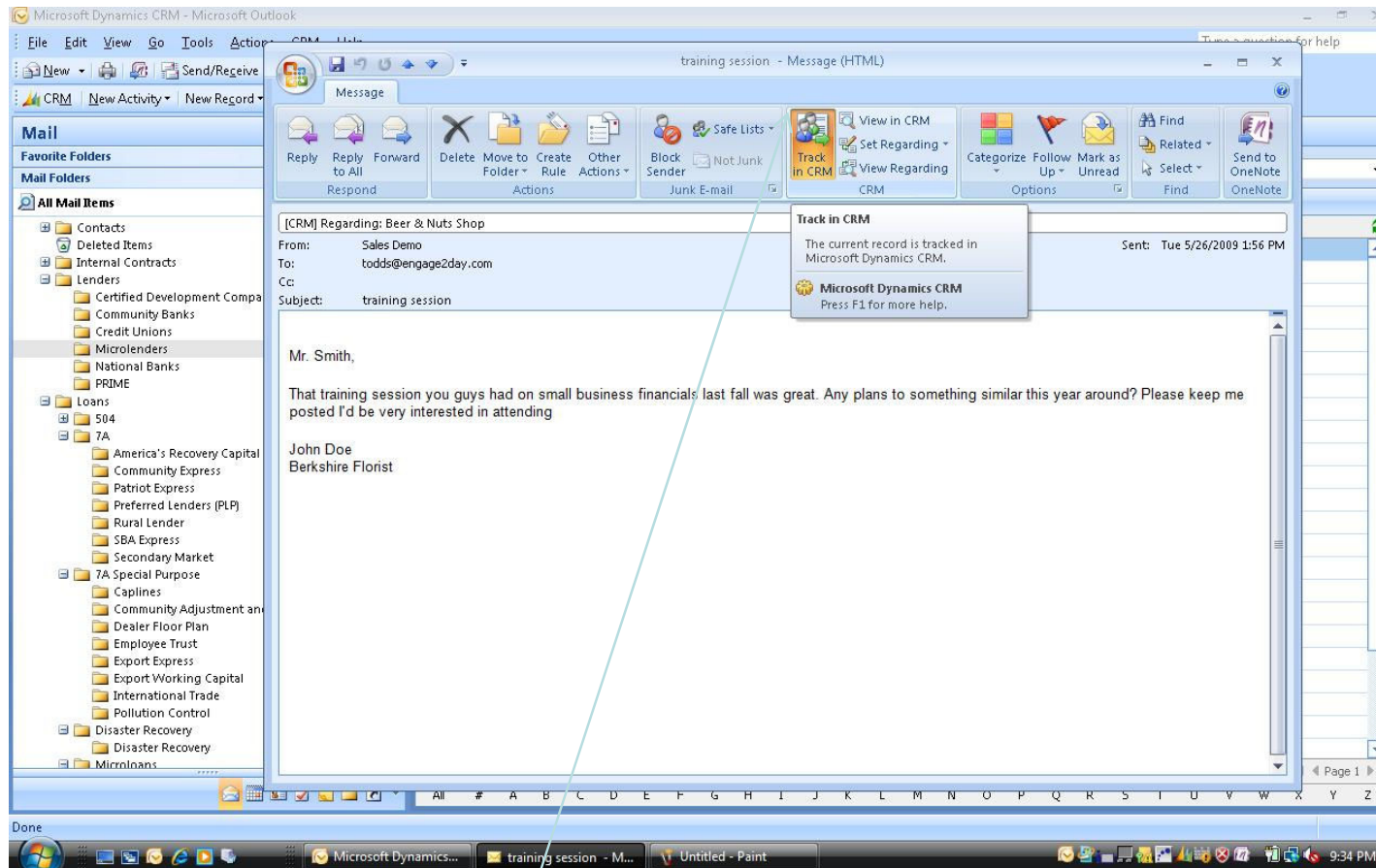
# Interactive Case Management & Collaboration



# User-Based Work Queues, Activities & Data Tools



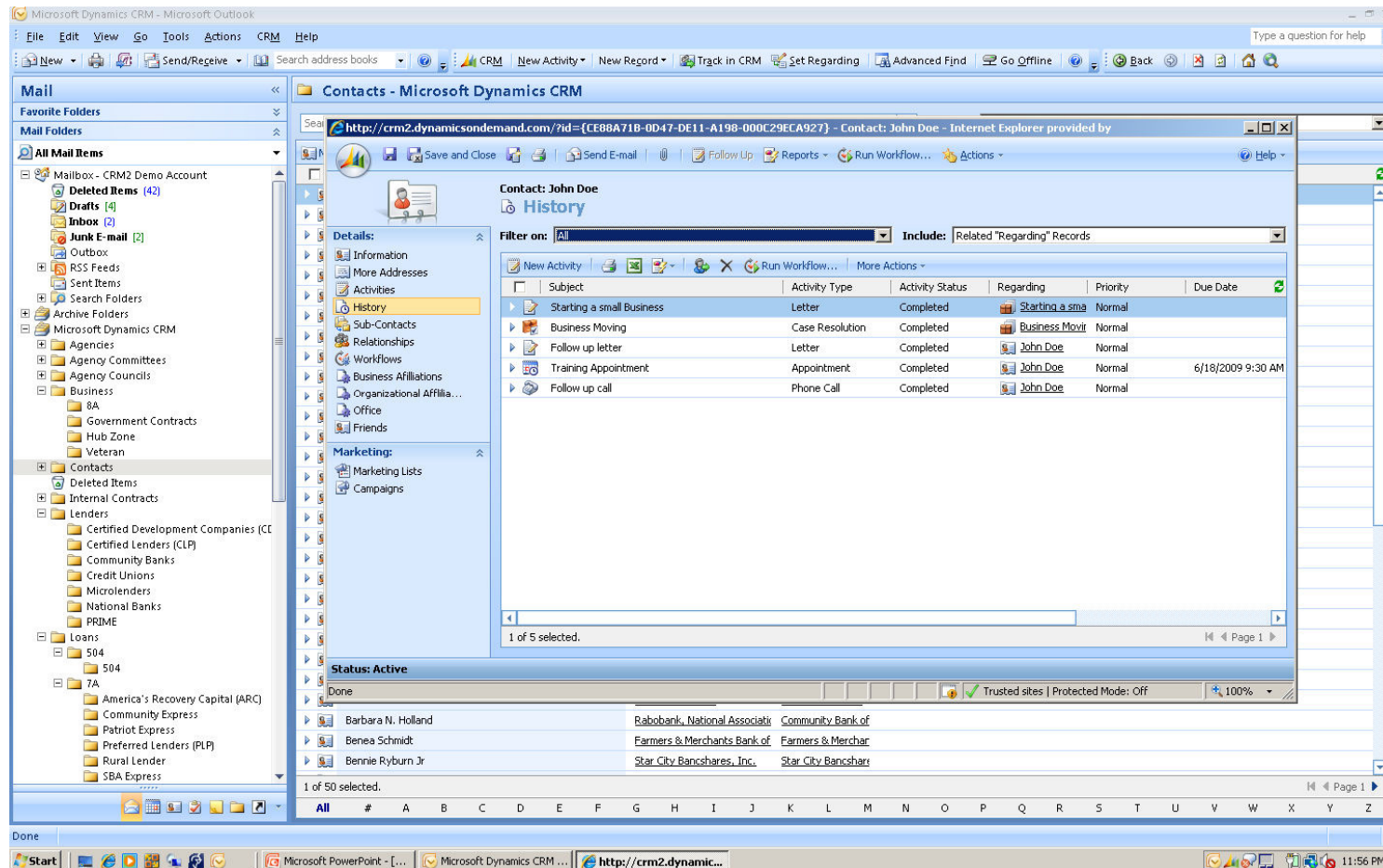
# CRM-Integrated Correspondence Management



Microsoft CRM features one click email tracking from Outlook, as well as automatic tracking of all emails if desired.

E=MC<sup>4</sup>

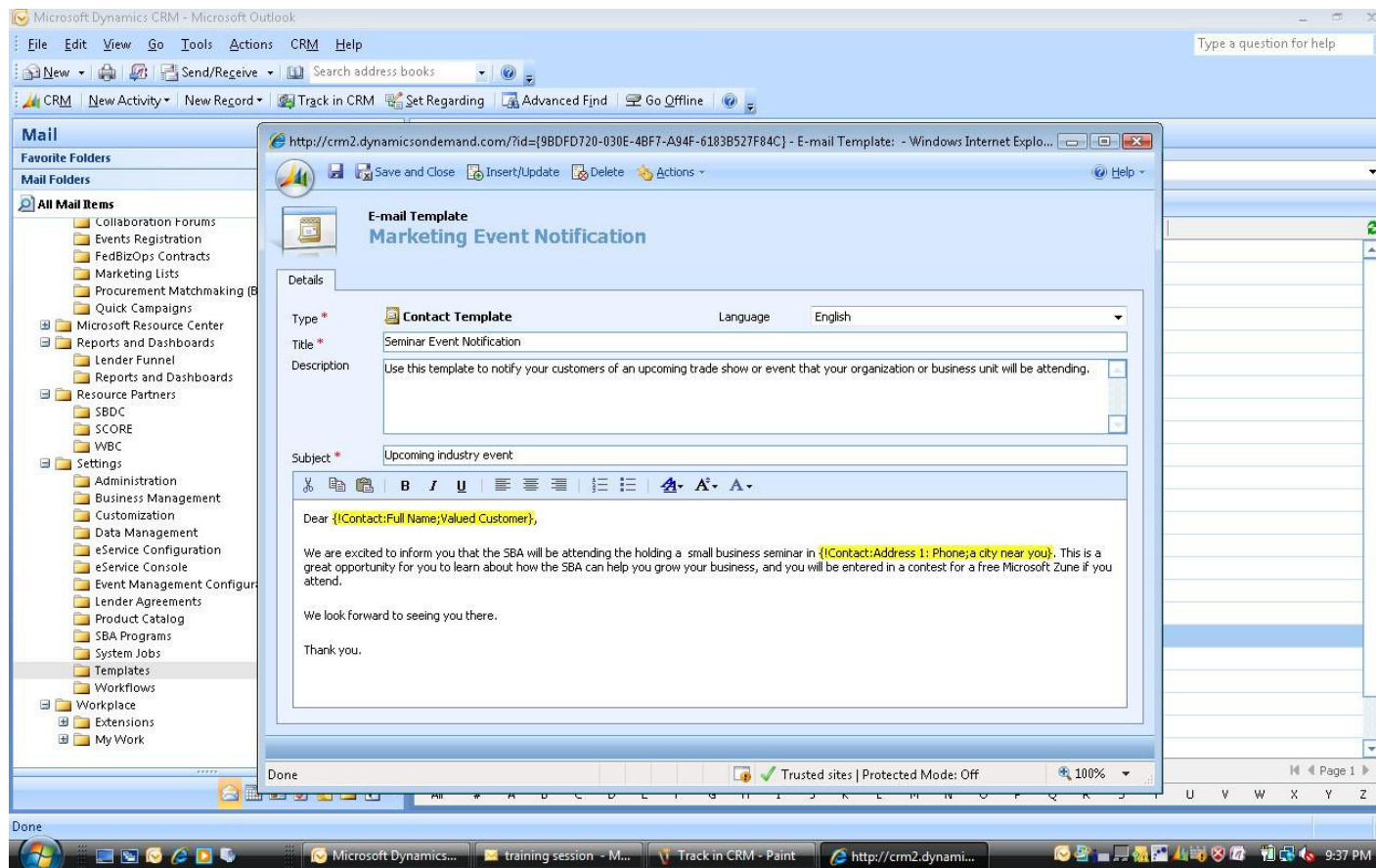
# Correspondence Management - II



Emails show up in a contact's history, along with other correspondence and communication.

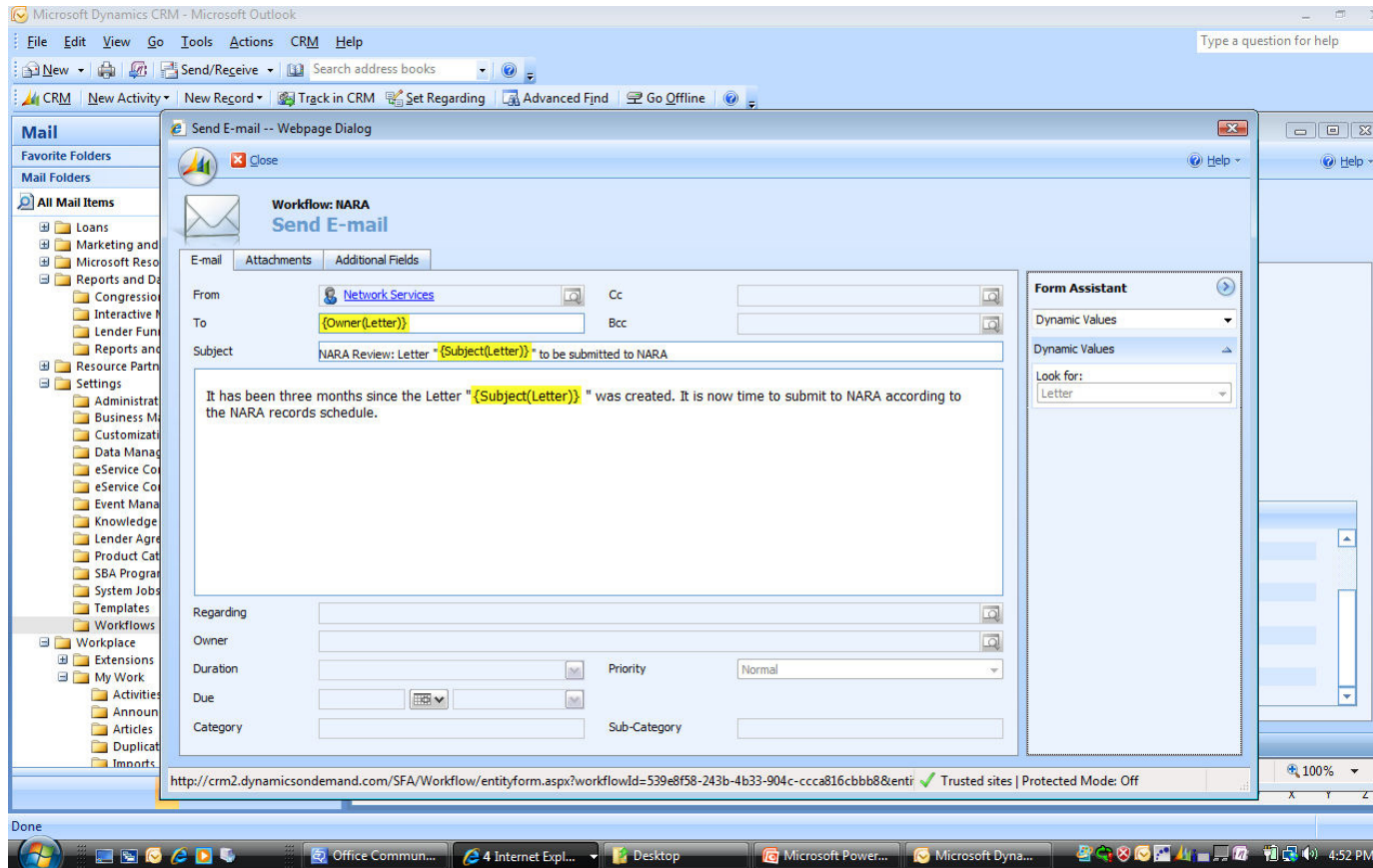


# Correspondence Management - III



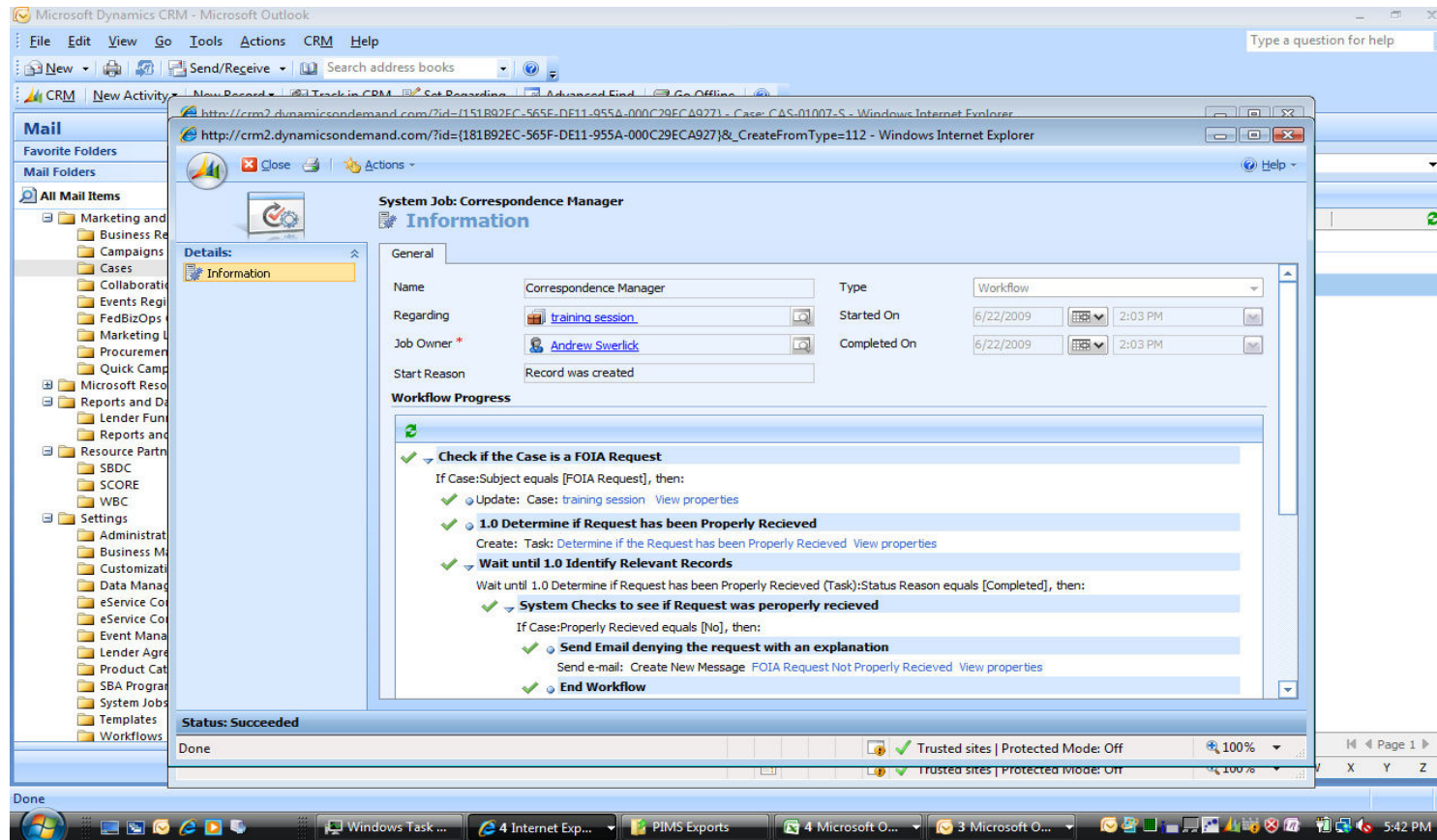
CRM also helps manage outbound correspondence through email templates, email or Word mail merges, and communication “campaigns”.

# Correspondence Management - IV



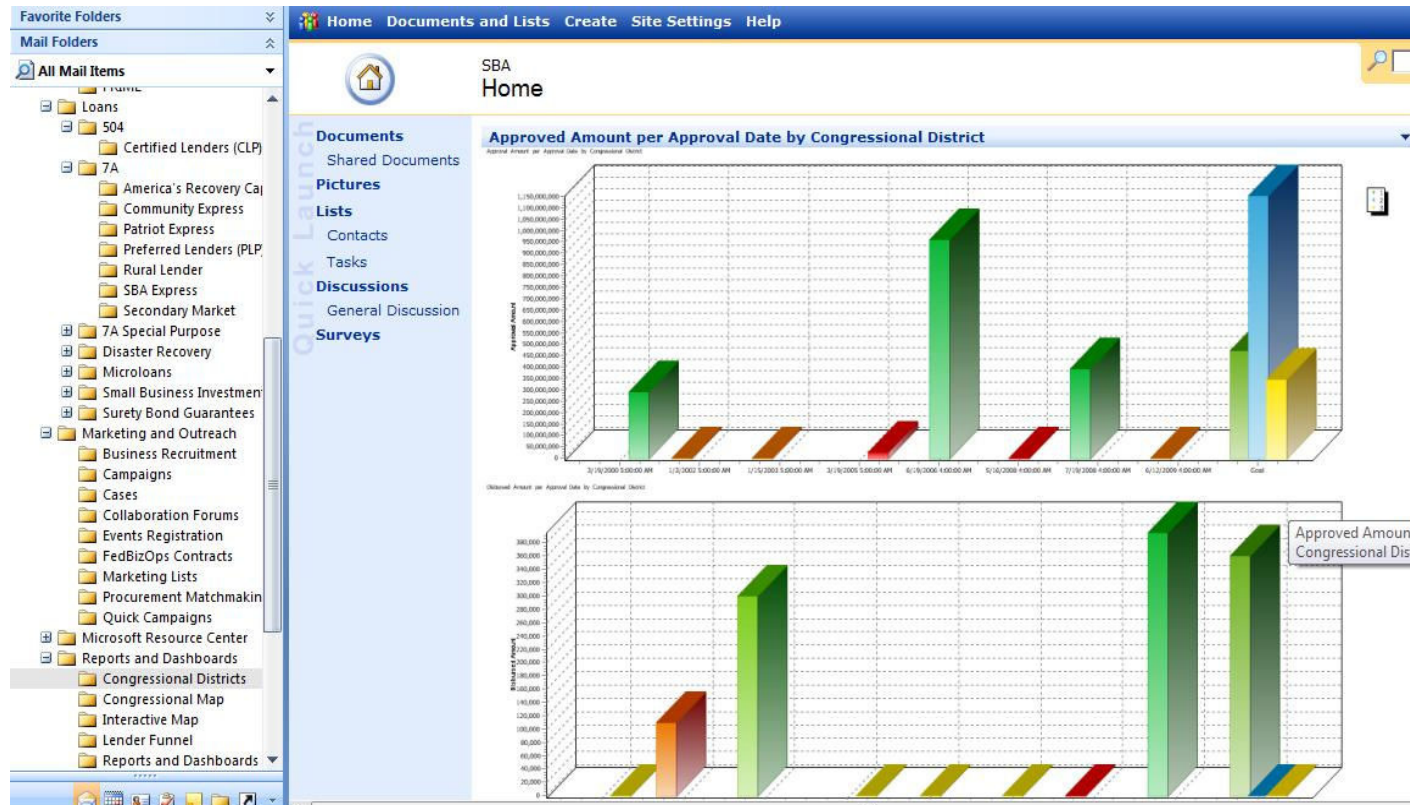
CRM's powerful workflow engine can be used to help ensure NARA-compliant records maintenance and FOIA request SLAs.

# Correspondence Management - V



A sample correspondence request workflow for cases that are categorized as FOIA requests. Assign tasks and send out auto-generated emails based on the contents of the case.

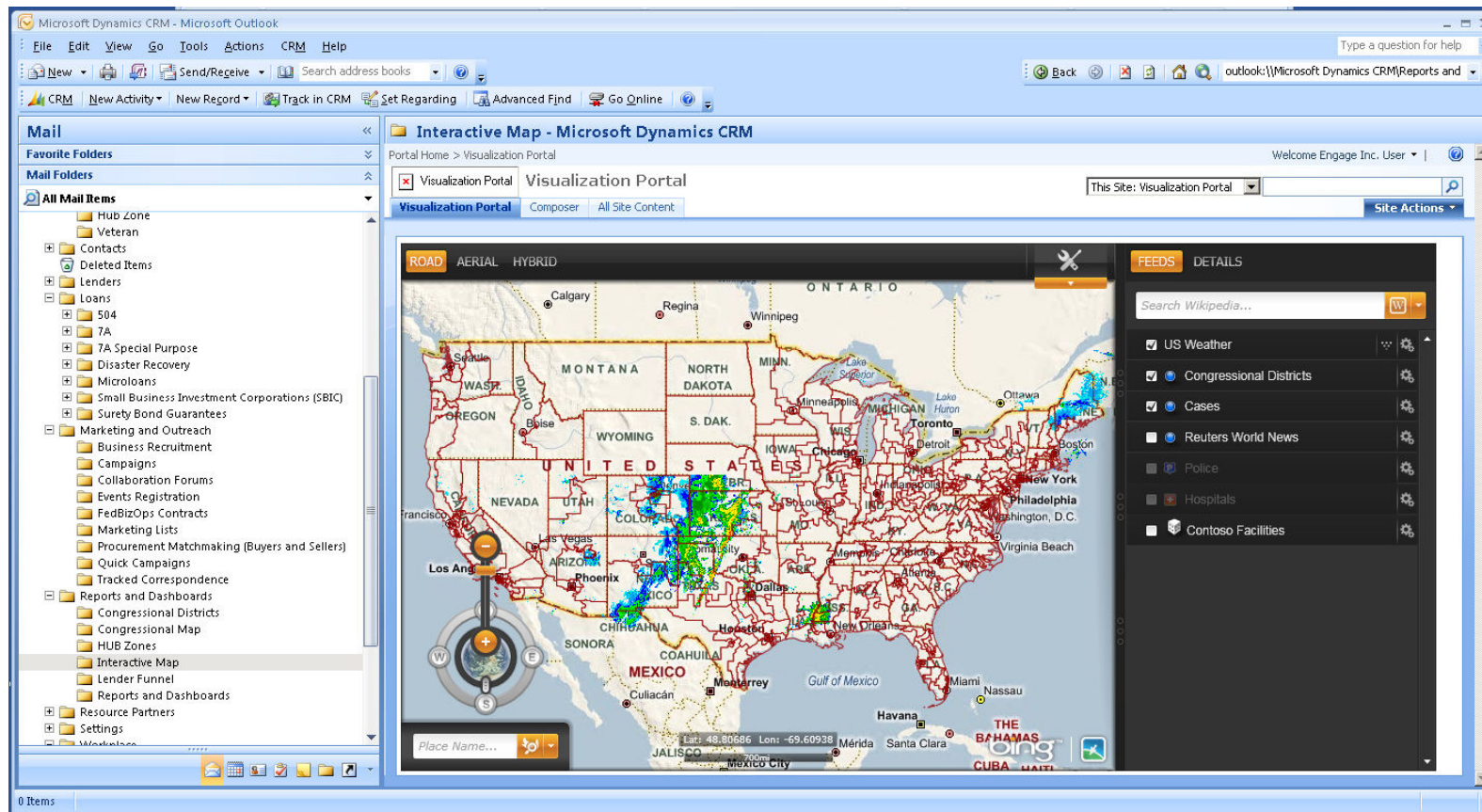
# Data Warehouse, Business Intelligence & Dashboards



A sample dashboard comparing correspondence activities between three Congressional Districts.

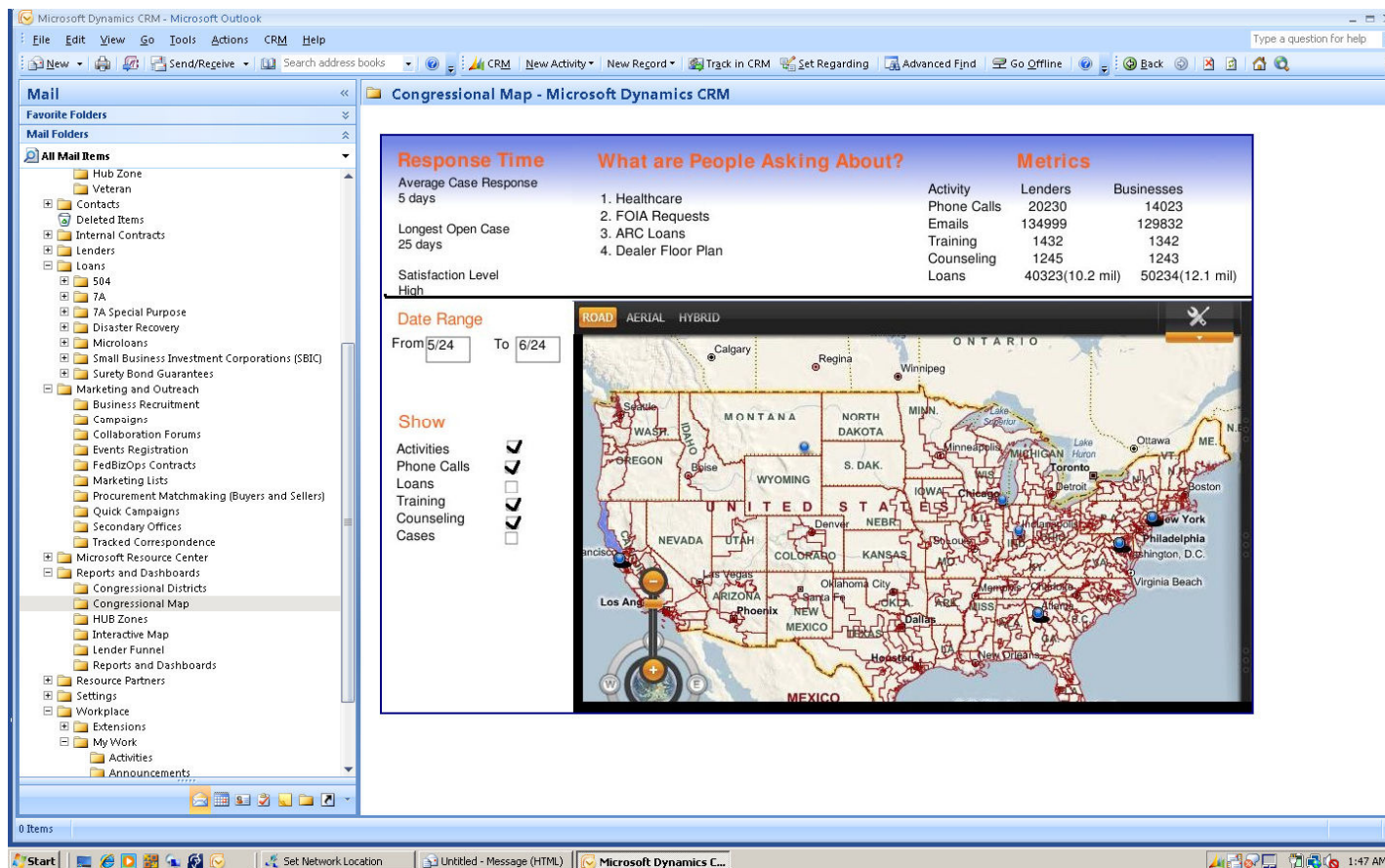


# Interactive Maps & Reporting



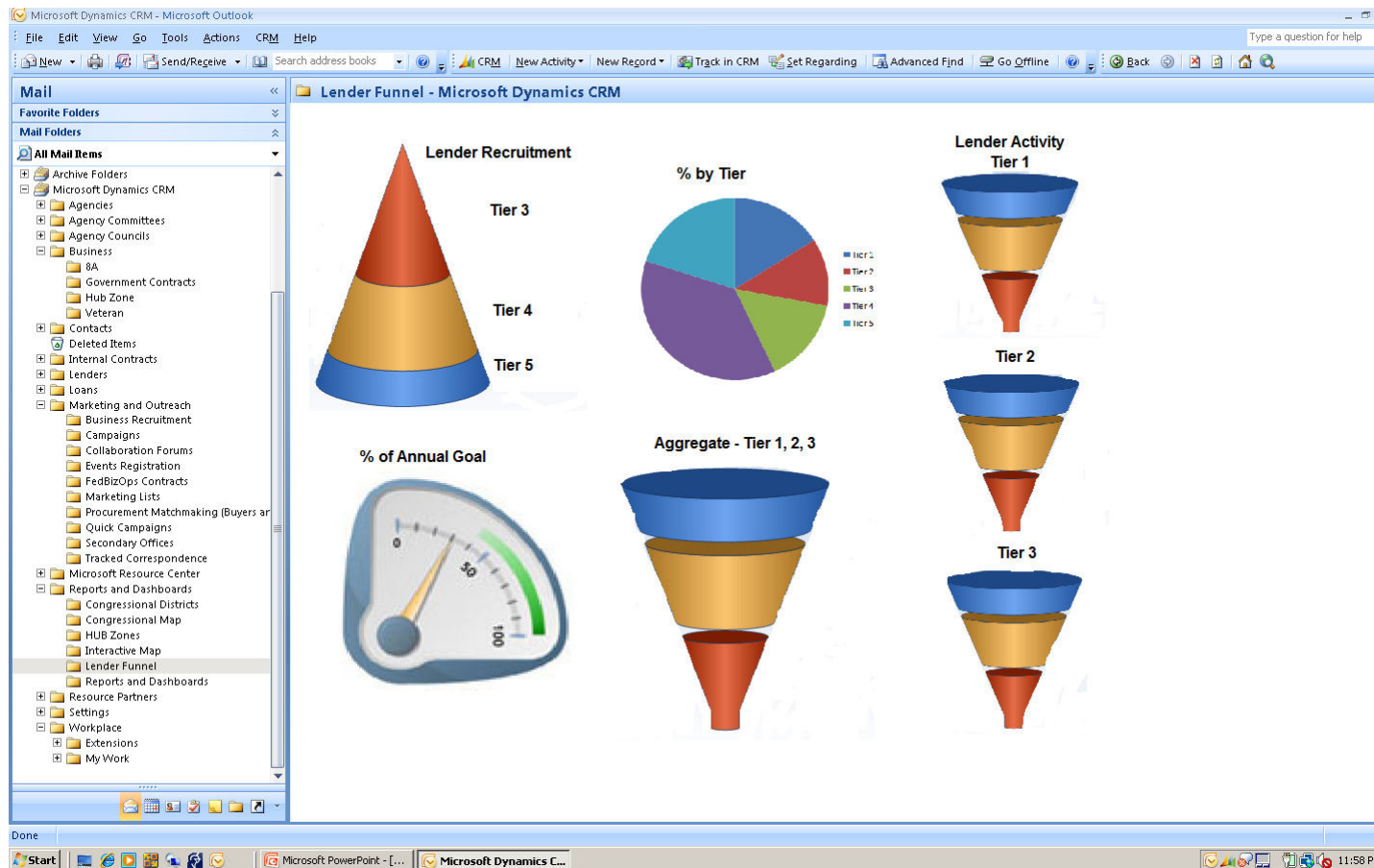
Built-in GIS software allows users to overlay SBA data on standard geographical boundaries such as Congressional districts.

# Interactive Maps & Reporting - II



In the full pilot, such software could be used to create a powerful web dashboard around SBA correspondence.

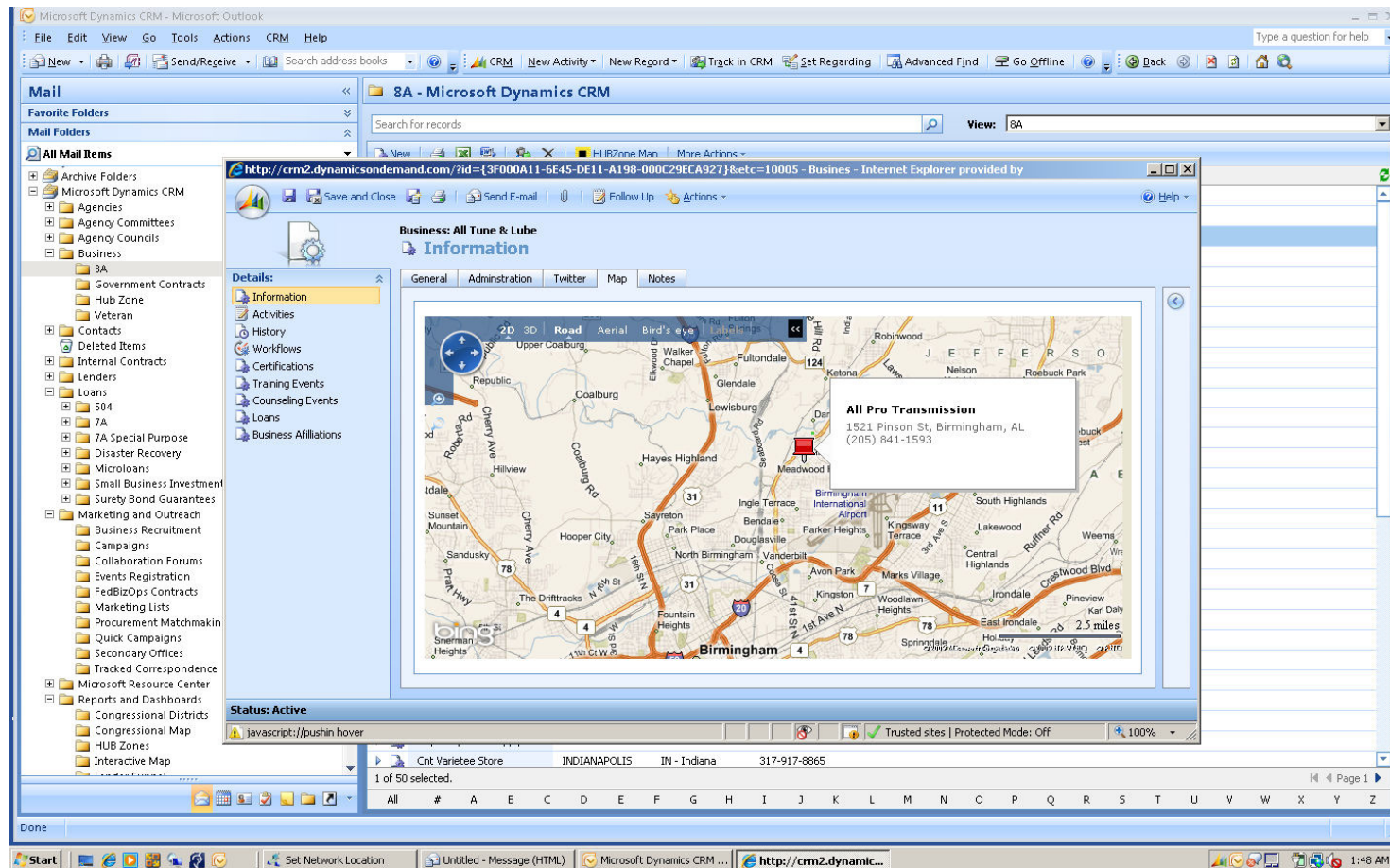
# Interactive Maps & Reporting - III



Interactive Dashboards provide overviews with the ability to drill down if more details are required.



# Interactive Maps & Reporting - IV



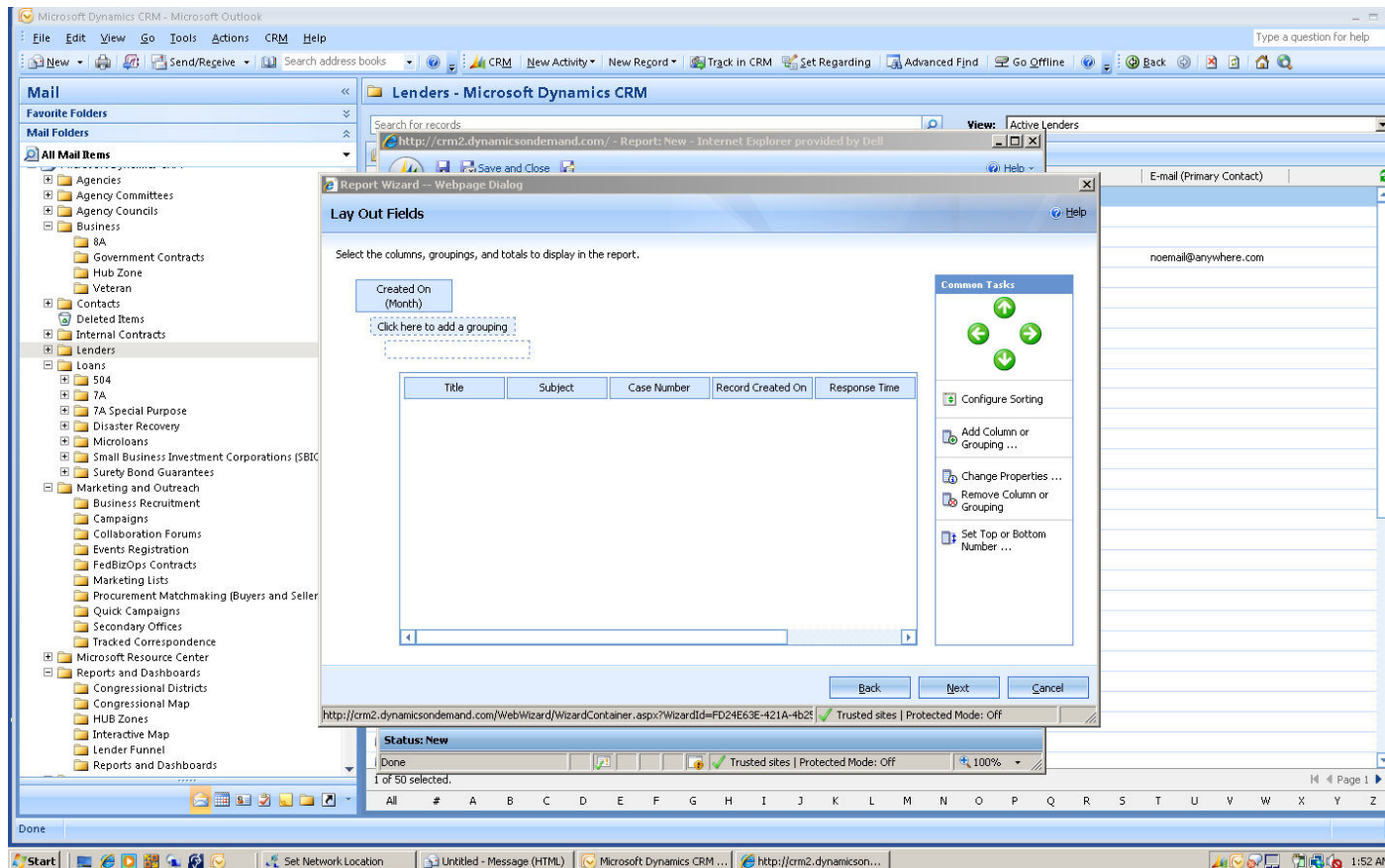
Maps are able to include features such as HUBZone overlays and pushpin markers to indicate individual and multiple locations for comparison and verification.

E=MC<sup>4</sup>



# Interactive Maps & Reporting

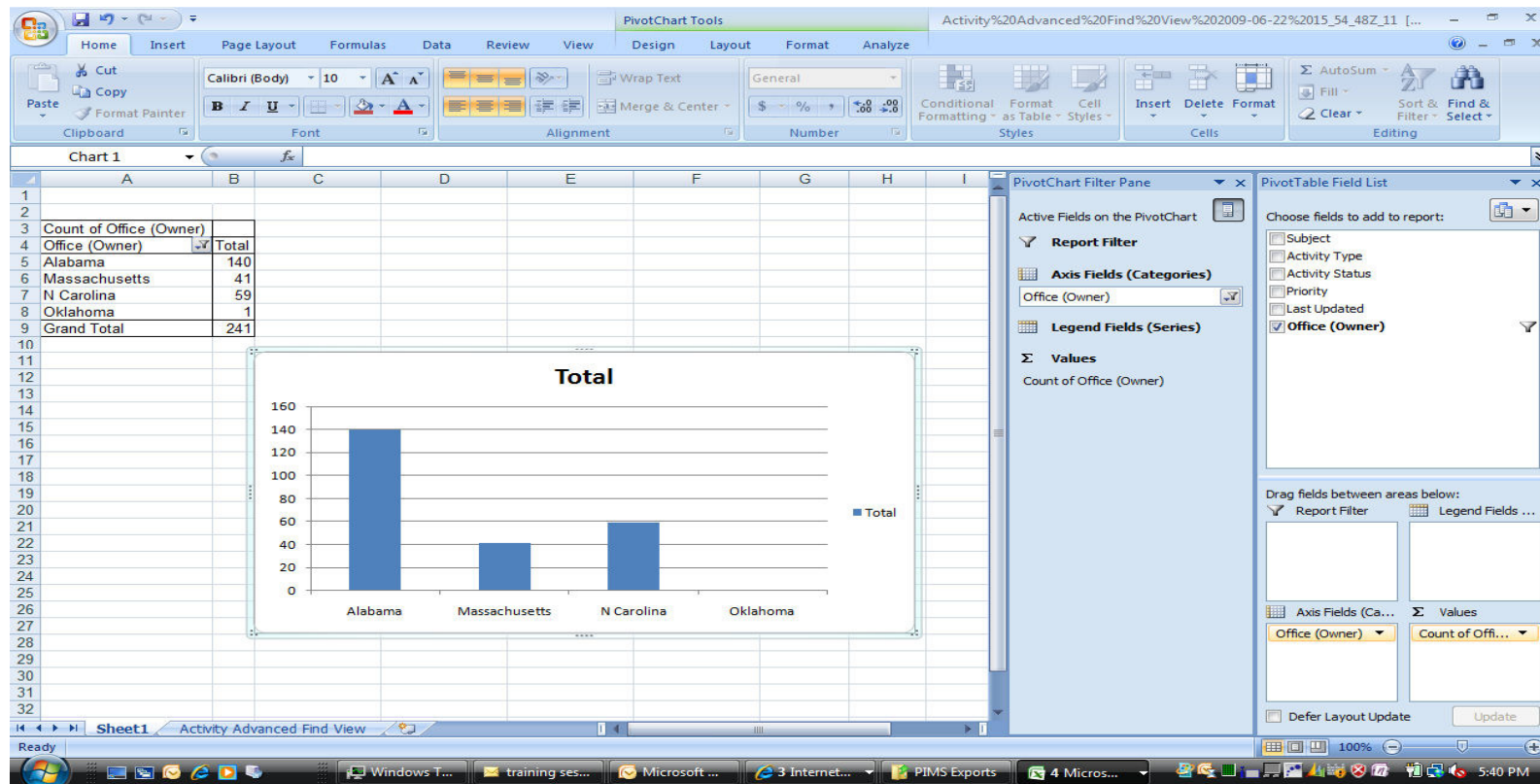
## Ad Hoc Reporting



CRM contains a powerful ad hoc reporting tool that allows users to build their own reports as needed and on the fly.

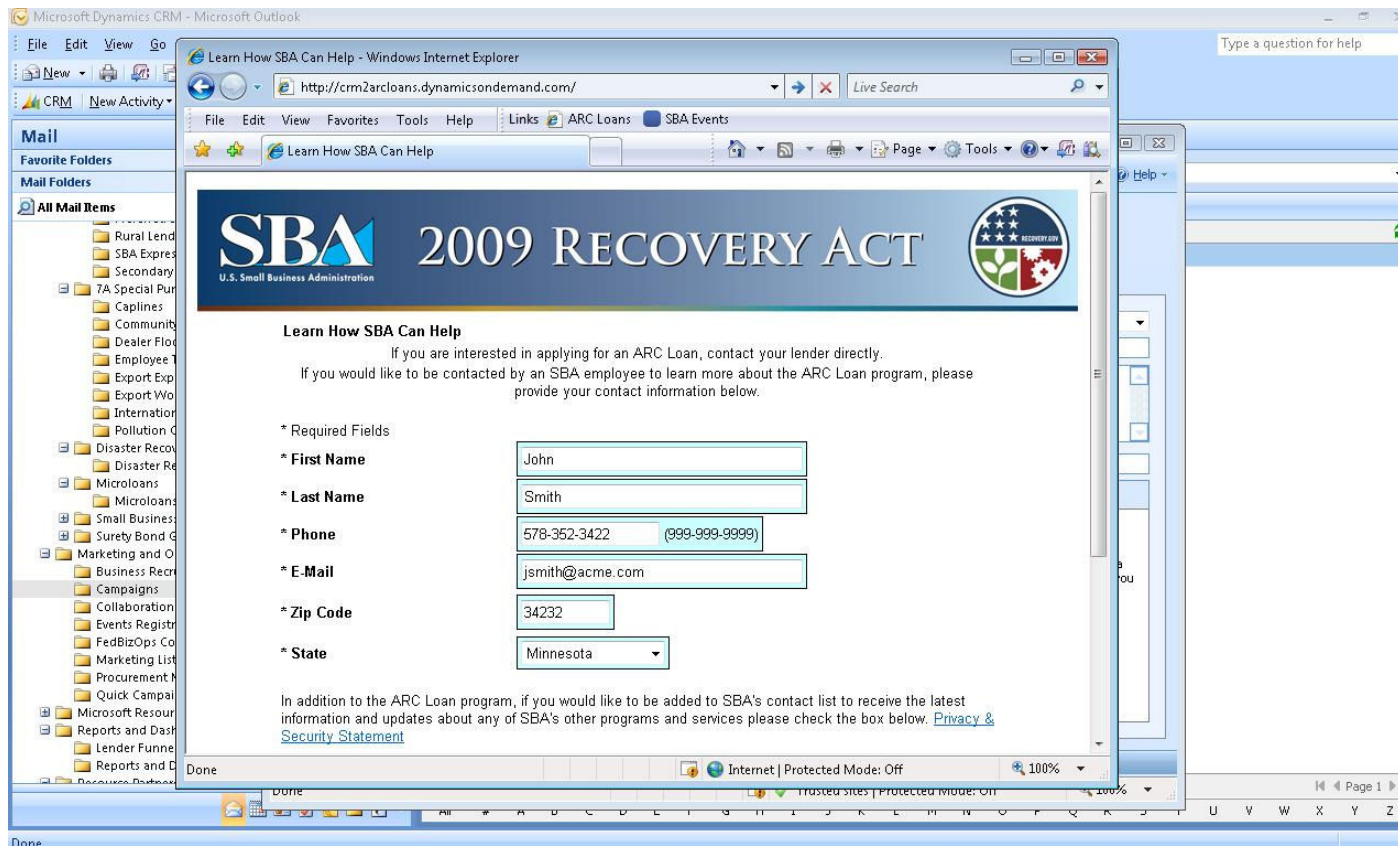
# Interactive Maps & Reporting

## Pivot Tables of SBA Office Activities



A sample pivot table showing activity totals by district office.

# Web 2.0 Online Intake



The screenshot shows a web browser window displaying a form titled "Learn How SBA Can Help" for the "2009 RECOVERY ACT". The form is part of a Microsoft Dynamics CRM system, as indicated by the "Microsoft Dynamics CRM - Microsoft Outlook" window title. The form includes a header with the SBA logo and the text "2009 RECOVERY ACT". Below the header, there is a section titled "Learn How SBA Can Help" with the following text: "If you are interested in applying for an ARC Loan, contact your lender directly. If you would like to be contacted by an SBA employee to learn more about the ARC Loan program, please provide your contact information below." The form contains several input fields: "First Name" (John), "Last Name" (Smith), "Phone" (578-352-3422), "E-Mail" (jsmith@acme.com), "Zip Code" (34232), and "State" (Minnesota). There is also a checkbox for "In addition to the ARC Loan program, if you would like to be added to SBA's contact list to receive the latest information and updates about any of SBA's other programs and services please check the box below." with links to "Privacy & Security Statement". The browser window shows the URL "http://crm2arcloans.dynamicsondemand.com/" and the page title "Learn How SBA Can Help".

Web forms eliminate the need for paper correspondence. This custom SBA form was built for the Proof of Concept in less than a day and writes directly into CRM.



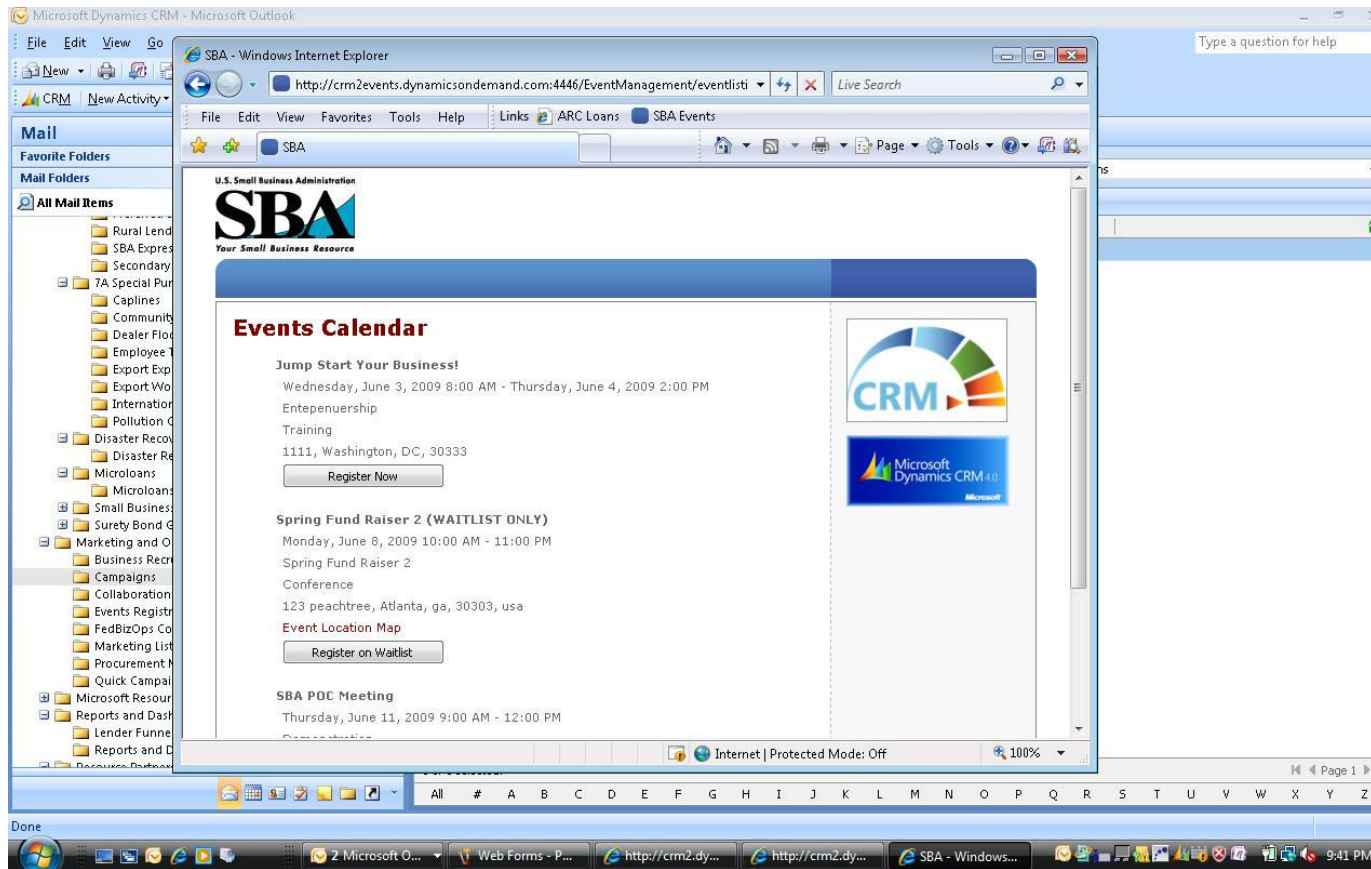
Mission Critical

Commerce

Communication

Continuity

# Web 2.0 Online Events Management



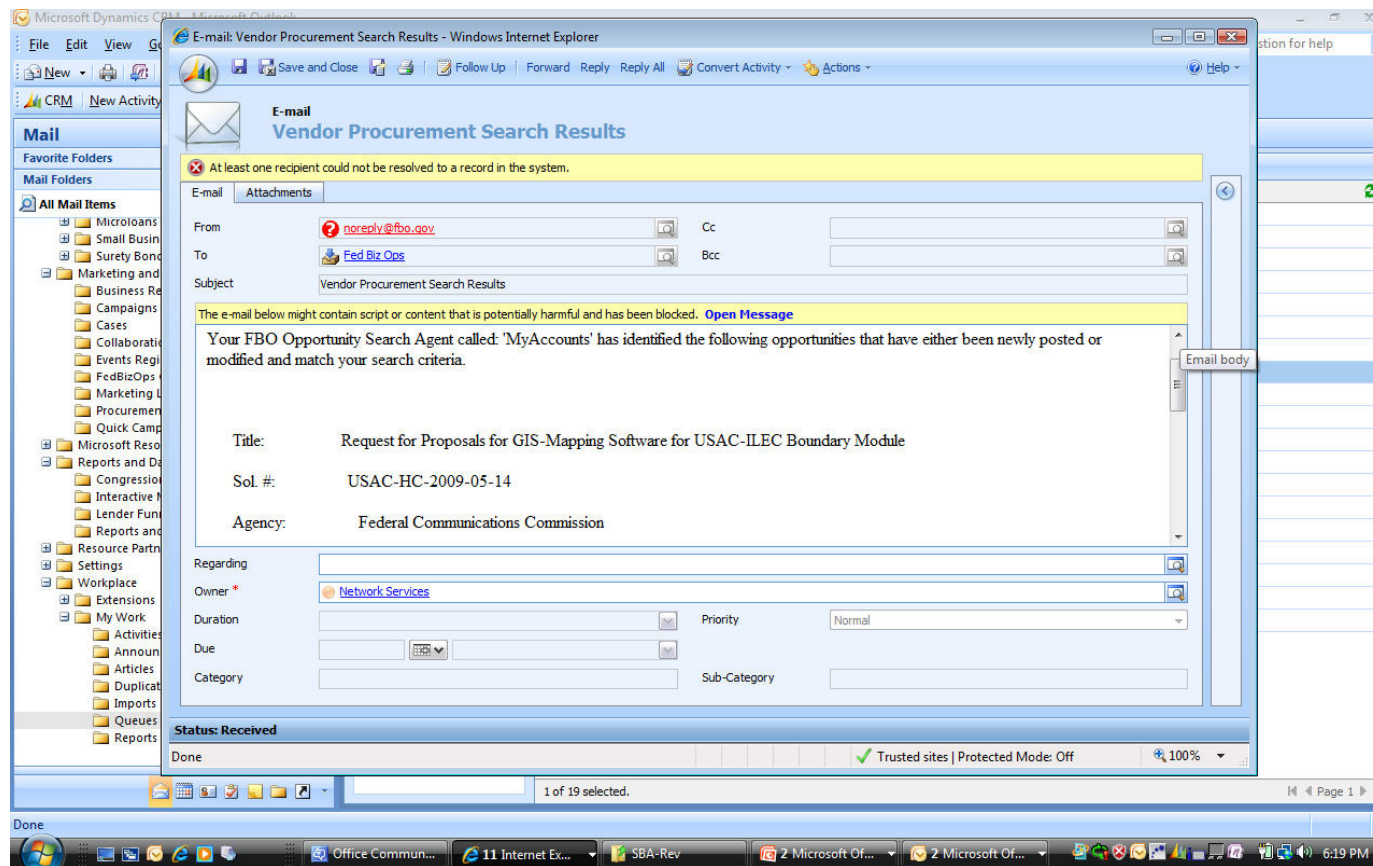
Through the free CRM Events Management Add-On users can create events;  
CRM allows others to sign up via an online web form.

E=MC<sup>4</sup>



# Web 2.0

## Subscription Information Services



CRM lets you subscribe to email blasts and RSS feeds with special email queues.  
Through the workflow engine, the system can automatically take action when new content arrives.



Mission Critical

Commerce

Communication

Continuity

# CRM-Integrated Secure Social Networking



An example of a user's SBA Social Networking home page.

E=MC<sup>4</sup>



Mission Critical

Commerce

Communication

Continuity

# CRM-Integrated Secure Social Networking - II

U.S. Small Business Administration  
**SBA** SBACommunity for the CRM Pilot Project  
Welcome to The Window  
Your Small Business Resource

Sign in | Join | Help

Home | Blogs | Media | Forums | Wikis | Groups

## Wikis

### Browse Wikis

Filter: All Pages | New Pages | Updated Pages | Your Pages [+ Add Page](#)

- Starting a Small Business**  
1. Do I have what it takes to own/manage a small business? Am I a self starter? How well do I get along with a...  
Revision #2 Posted by Todd Sharp on Tue, Jun 23 2009
- Financing a Business**  
1. How do I apply for a SBA Loan Guarantee? SBA has three different loan programs. Each of the programs is designed...  
Revision #1 Posted by Todd Sharp on Tue, Jun 23 2009

Search this site

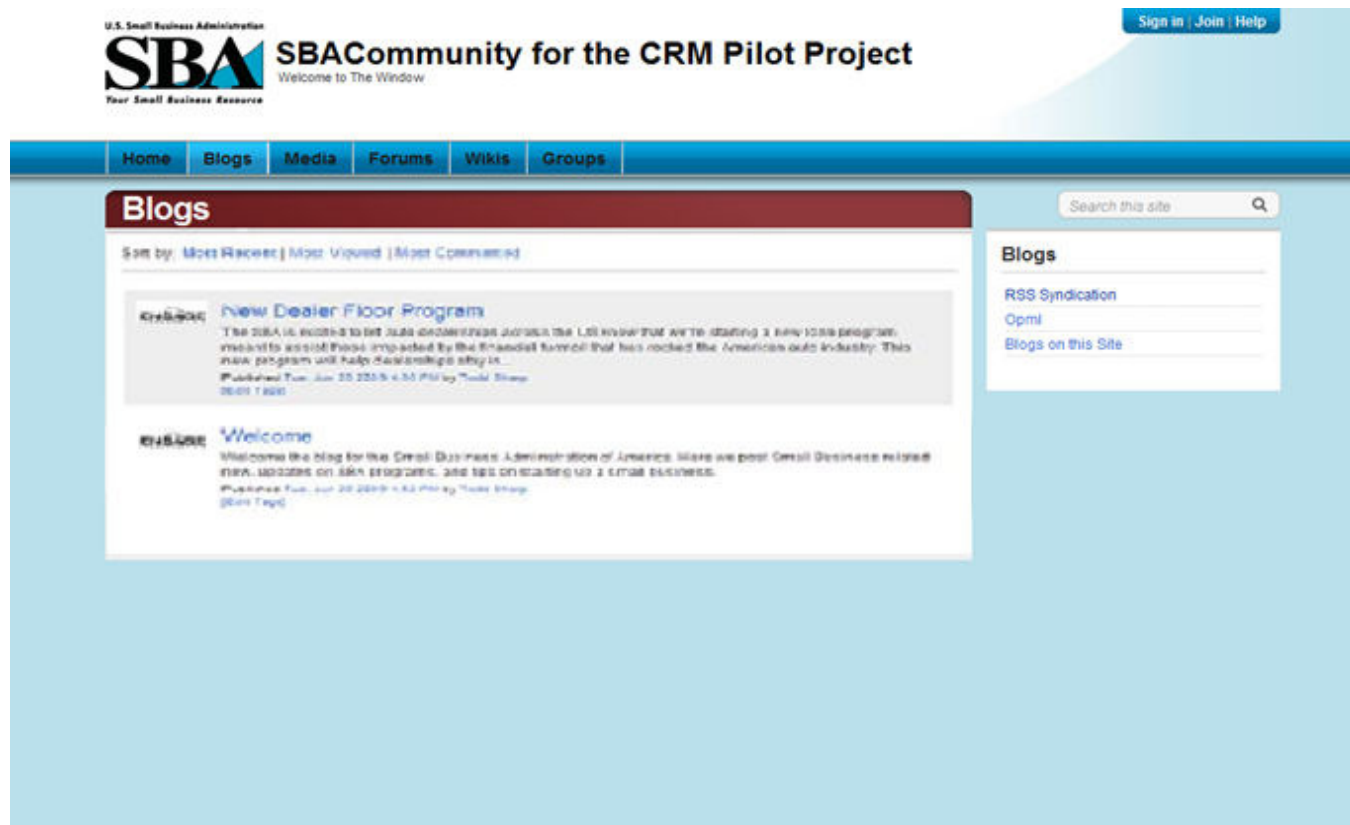
### Tags

[Sample Wiki](#)  
[View more](#)

An example of a wiki where users can add new pages and edit existing pages for FAQs or other reference material.

E=MC<sup>4</sup>

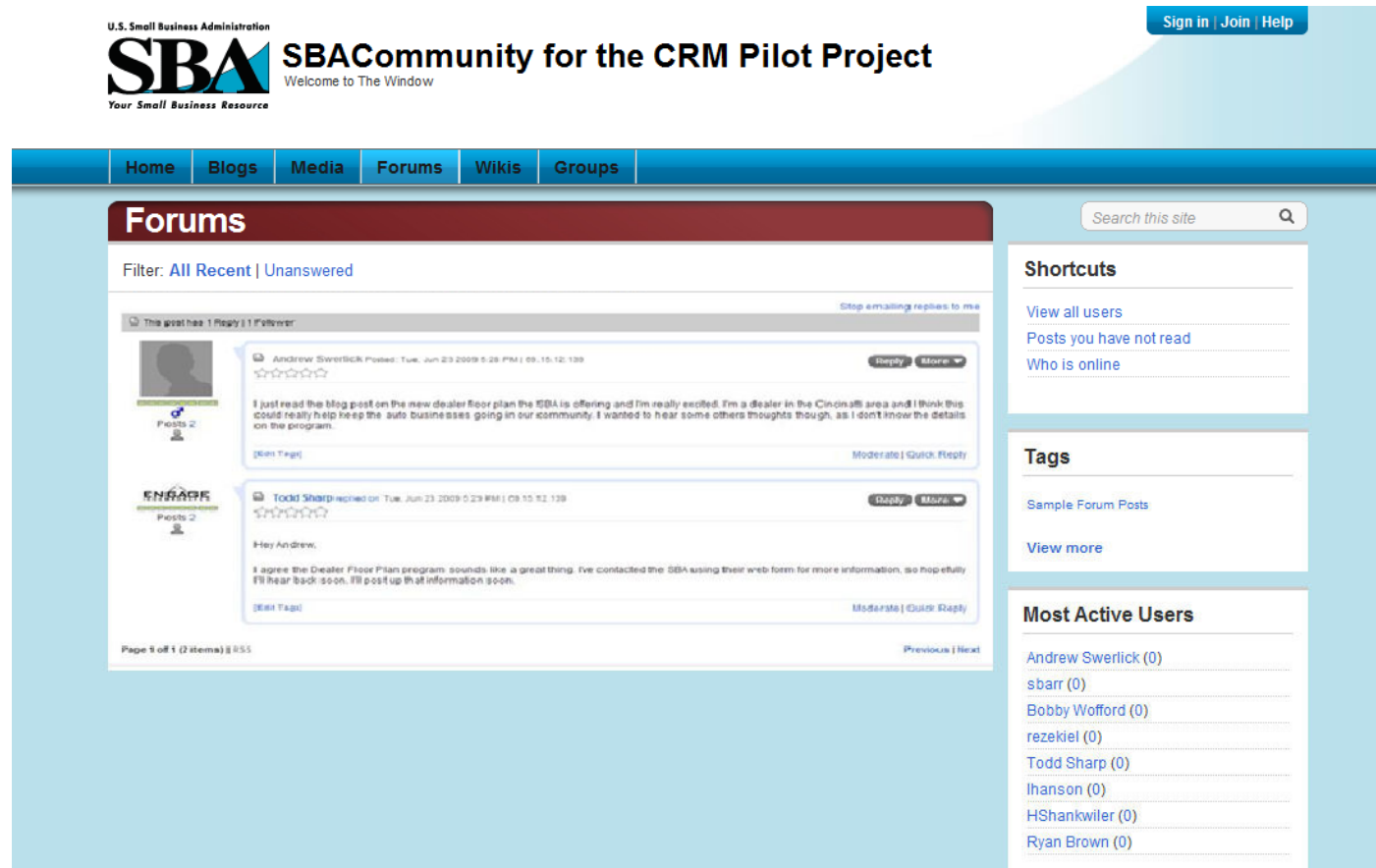
# CRM-Integrated Secure Social Networking - III



A sample blog with excerpts of the posts on displayed on a home page.  
The look and feel of the site is completely configurable through themes / skins.



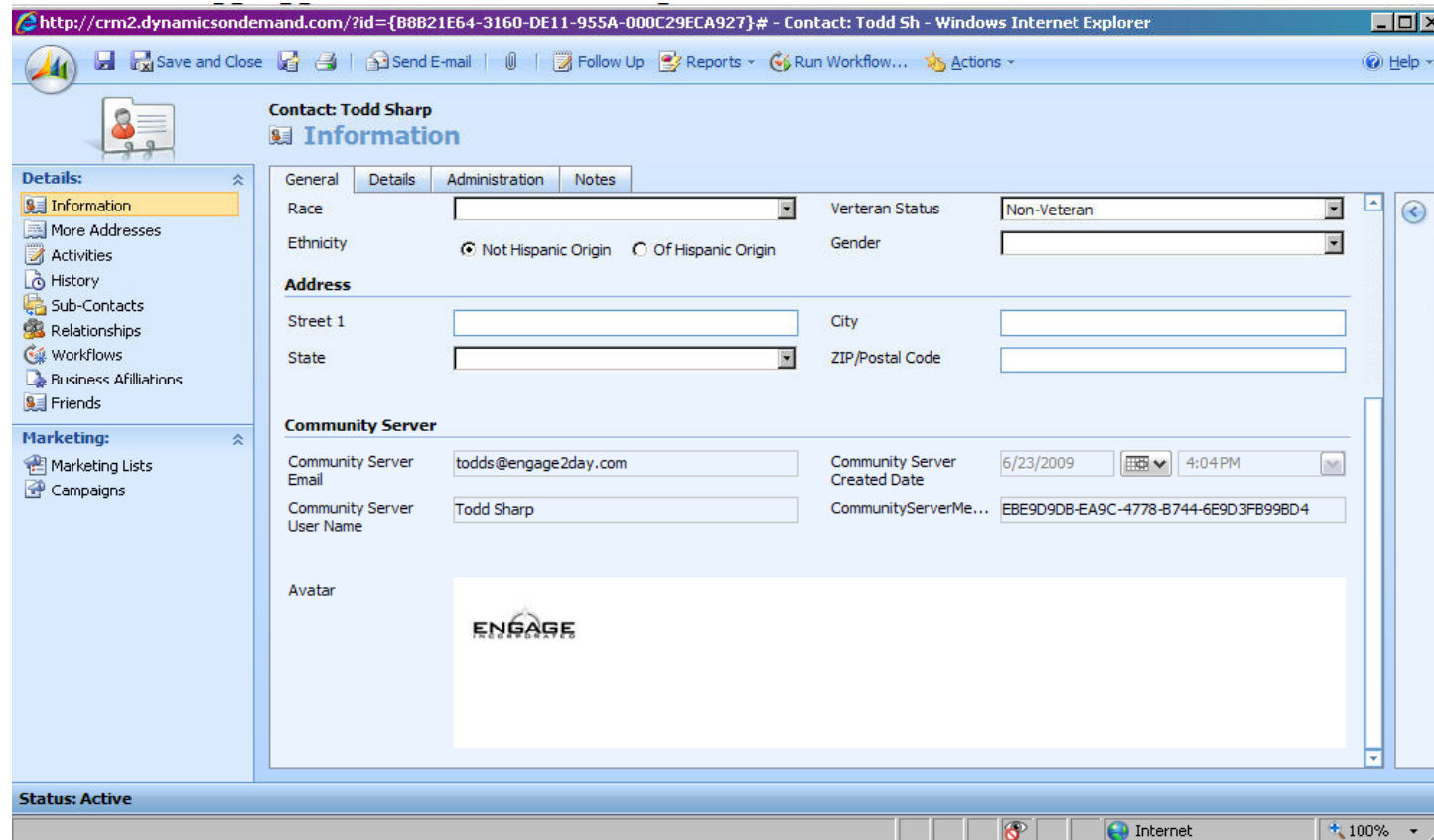
# CRM-Integrated Secure Social Networking - IV



The screenshot shows the SBACommunity website interface. At the top, there are logos for the U.S. Small Business Administration (SBA), DRT Strategies, and ENGAGE INCORPORATED. The main header includes the text "SBACommunity for the CRM Pilot Project" and "Welcome to The Window". A navigation bar contains links for Home, Blogs, Media, Forums, Wikis, and Groups. A search bar is located in the top right corner. The main content area is titled "Forums" and displays a list of forum posts. The first post is by Andrew Swerlick, dated Tue, Jun 23 2009 5:28 PM. The second post is by Todd Sharp, dated Tue, Jun 23 2009 5:29 PM. The right sidebar contains sections for "Shortcuts", "Tags", and "Most Active Users".

Forums allow community members to interact, share information and answer each other's questions.

# CRM-Integrated Secure Social Networking - V



Members of the Social Networking site also show up in CRM, where users can view basic profile information.

E=MC<sup>4</sup>



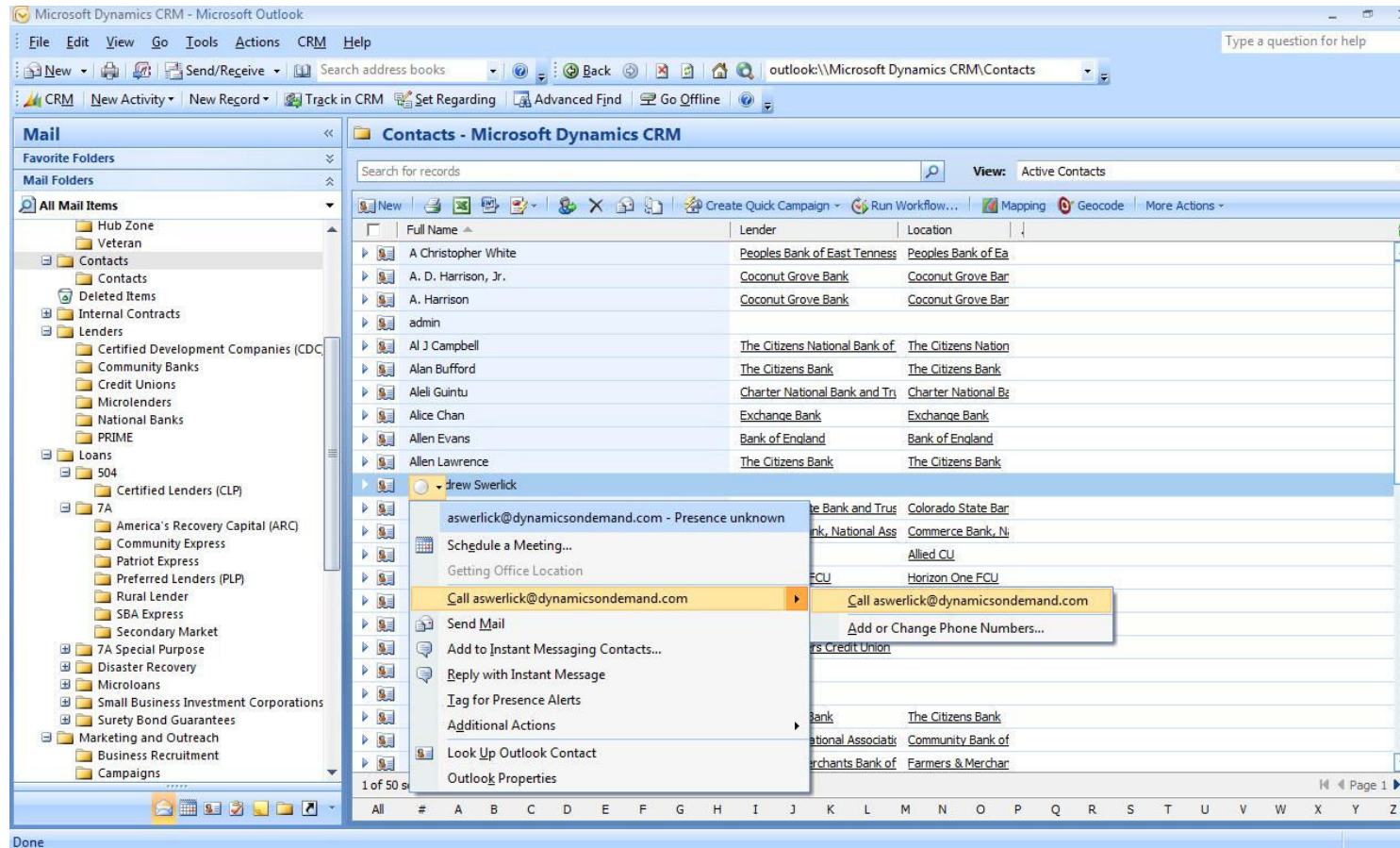
Mission Critical

Commerce

Communication

Continuity

# Unified Communications



Integration with Microsoft Office Communication Server – Unified Communication capabilities, presence and click-to-call features from CRM.

E=MC<sup>4</sup>

# Multi-Device Mobility



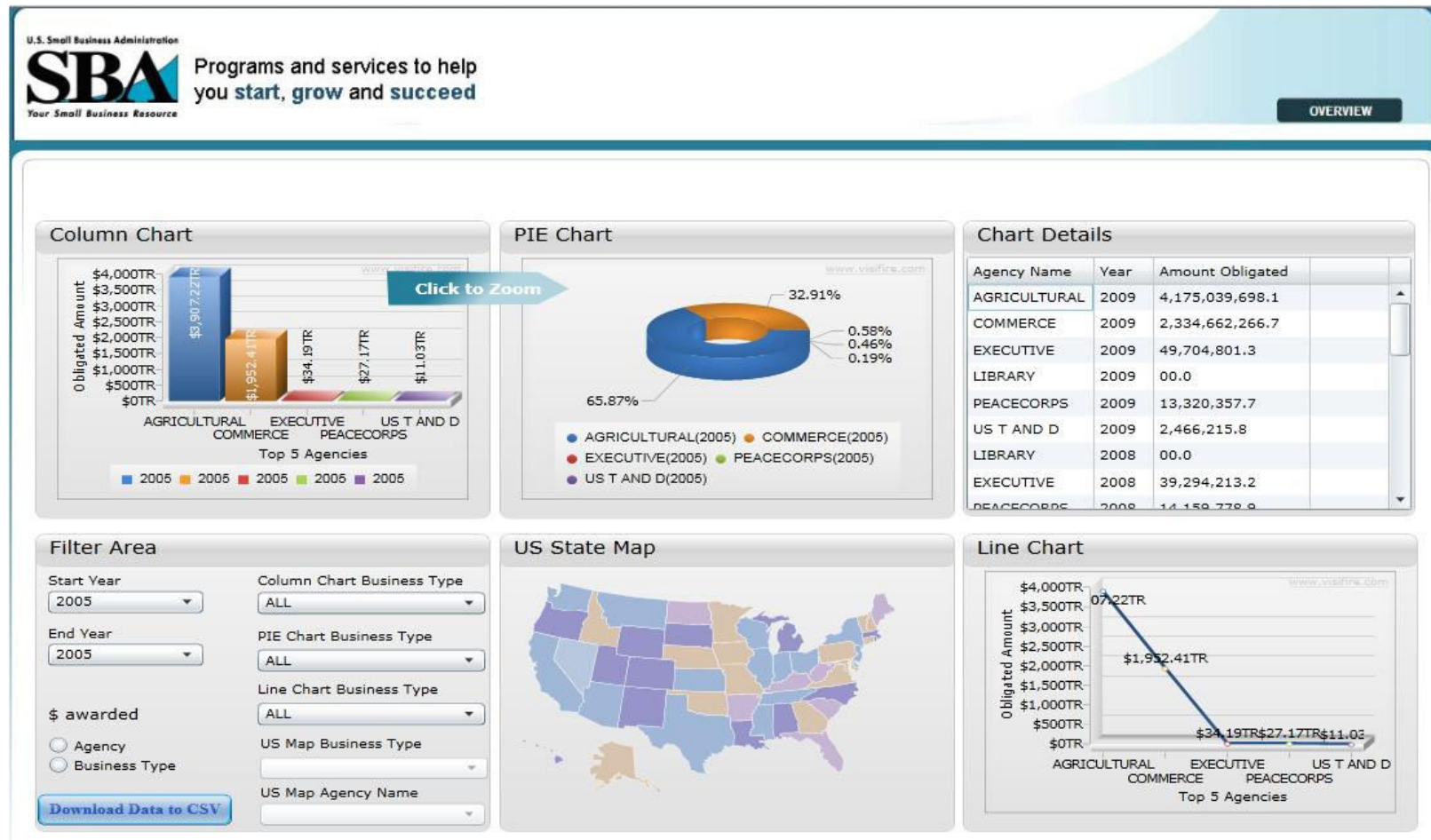
*CRM Mobile Express allows real-time access to your Microsoft CRM data from any Internet-capable device.<sup>1</sup>*

*Create rich mobile "mash-ups" with full access to the CRM Mobile Express source code.<sup>2</sup>*

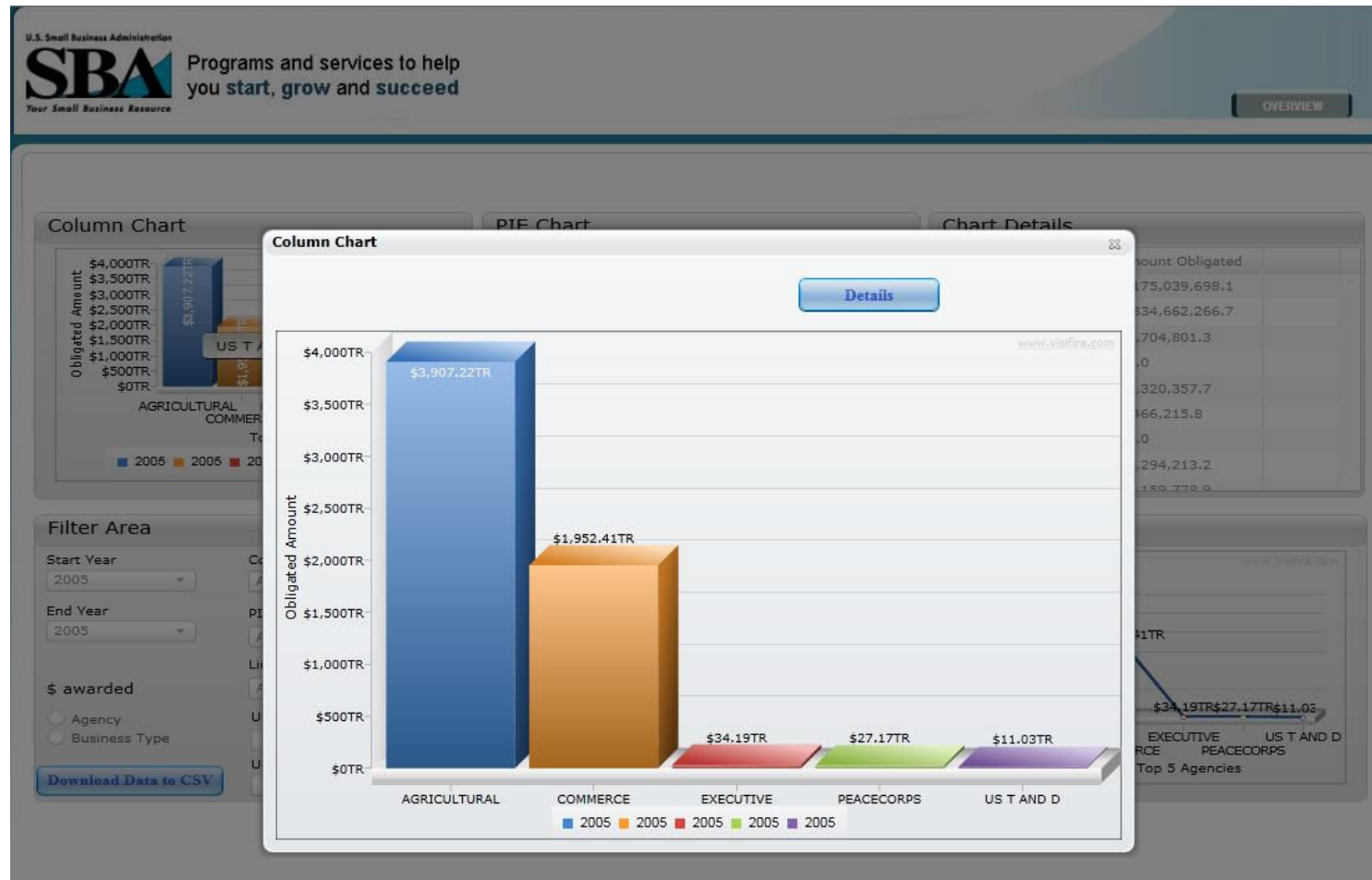
Microsoft CRM Mobile Express



# Media-Rich, Data-Driven Dashboards - I



# Media-Rich, Data-Driven Dashboards - II



E=MC<sup>4</sup>