

# Online Customer Relationship Management (CRM)/ Performance Databases System

## Screen Shots

*October 2022*



# Accounts Fields – Entered by Project

## Required Fields

- Account Name
- Business Center
- Phone:
- Email Address
- Website
- Race/Ethnicity
- Primary NAICS
- Business Address
- Program Type(s)

New Account: Account

### Industry Information

\* Primary NAICS ⓘ

Search NAICS Code...

NAICS 2 ⓘ

Search NAICS Code...

### Program (Select at least one program)

Advanced Manufacturing Program

Export Program

Business Center Program

Federal Procurement Center Program

Capital Program

### Business Address

Country

United States ▼

[View all dependencies](#)

\* City

\* Address Line 1

\* State

--None-- ▼

[View all dependencies](#)

Address Line 2

\* ZIP Code

Suite

ZIP+4

# Contact Fields – Entered by Project

New Contact: Contact Record Type

## Contact Information

Contact Owner  
Jerry Hlggins

Status

Active

\* Name

Salutation

\* Phone

## Address Information

Country

United States

[View all dependencies](#)

\* City

\* Business Address 1

\* State

--None--

[View all dependencies](#)

Business Address 2

\* ZIP Code

Suite

ZIP+4

Manager Name ⓘ

Search Contacts...



Directors Contact

Contact Type

--None--

\* Status of Engagement

Made Initial Contact

\* Business Center

Search Business Centers...



## Required Fields

First & Last Name

Job Title

Status of Engagement

Business Center

Phone

Email

Address Information

# Service Fields – Entered by Project

## New Service: New Service


### Information

Service Request

Last Name

First Name

\* Business Center

### Service Request Information

\* Account Name


\* Service Type

Contact Name

Priority

\* Fee Amount Billed

\* Fee Amount Collected

Waived Fee Amount

Total Attendees

### Description Information

Subject

\* Description

### Program (Select only one program)

Federal Procurement Supplement Program

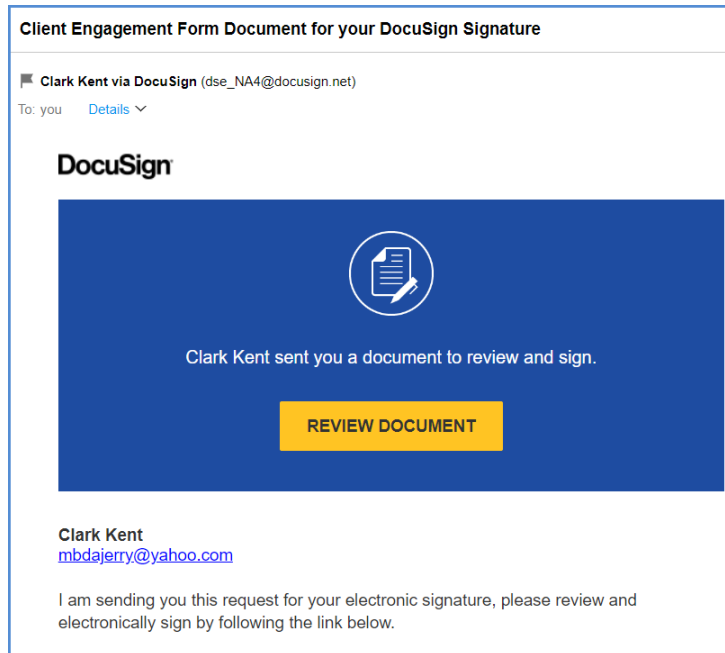
### System Information

# DocuSign – Client Actions

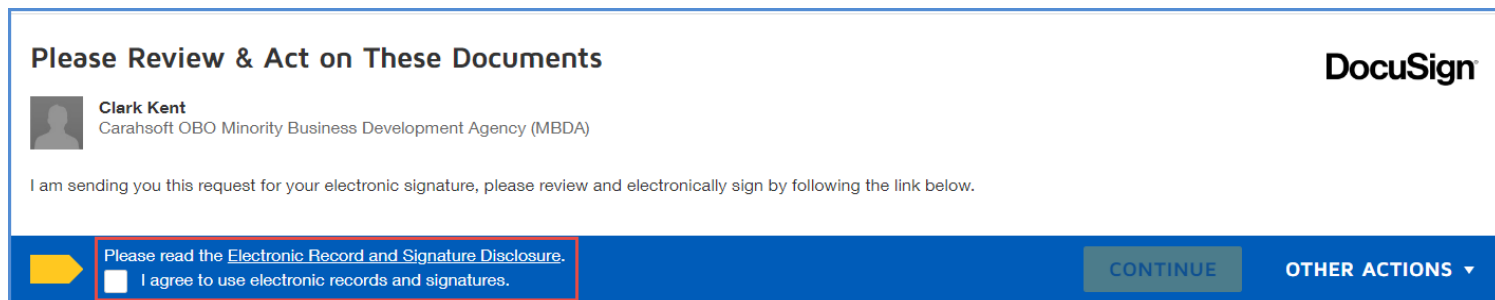
## Actions

MBDA project initiates an engagement action & completes form

The respondent (i.e., client) receives an email from DocuSign with the option to review and sign the document by clicking the “REVIEW DOCUMENT” button.



First page will always be the Electronic Record and Signature Disclosures. Please advise your Client to review the form for accuracy before clicking sign.





# DocuSign – Client Engagement Form

Client clicks to  
sign document

## Privacy Disclosure and Information Use

By submitting this form, your company agrees to allow the Minority Business Development Agency (MBDA) in Washington, D.C. to share this document, information contained therein, and any supplementary material provided by your company (collectively "Client Engagement Form") on an as needed basis, with other United States Government agencies to carry out appropriate due diligence and more effectively advocate for your interests. The Client Engagement Form also may be used by MBDA and MBDA Business Centers for the purposes of conducting research, studies, and analysis consistent with the MBDA mission as stated in Executive Order 11625. The Client Engagement Form is considered business confidential and will not be shared with any other person or organization outside the U.S. Government unless the MBDA Headquarters is given permission to do so by your company. All business confidential information will be protected from disclosure to the extent permitted by law.

DocuSigned by:  
*Lois Lane*  
Signature of Authorized Client Representative

9/2/2022  
(Date)

Lois Lane  
Print Name of Authorized Client Representative

Daily Planet Newspaper  
Name of Business

Dear Reader Drive  
Address  
Dover Delaware 19901

City, State, Zip  
5555556743

Telephone  
info@dp.com


E-Mail  
DocuSigned by:  
*Clark Kent*  
Signature of MBDA Business Center Representative

9/2/2022  
(Date)

Clark Kent  
Print Name of MBDA Business Center Representative

# DocuSign – Client Transaction Verification Form

Client reviews  
outcome  
document



## Minority Business Development Agency Client Transaction Verification Form

Pursuant to the mutually agreed upon terms of the Minority Business Development Agency (MBDA) Internal/External Client Engagement Form, your firm contracted with MBDA to provide one or more of the following services:

Contract Assistance  Financing Assistance  Business Consulting  Other

For transactions in which the services provided by MBDA, either directly or indirectly, by providing business consulting, referrals or other services, resulted in either a contract or capital award, please answer the following questions:

### Contract Award

Did you receive a contract award? Yes  No

What type of contract?  Standard  Multiple/Multi-Year  IDIQ

If yes, what was/were the Dollar Amount(s) of the award(s)?

Date: 08/03/2022 \$ 53000000 From Whom:

DOJ

Date: \_\_\_\_\_ \$ \_\_\_\_\_ From Whom:

Date: \_\_\_\_\_ \$ \_\_\_\_\_ From Whom:

### Capital Award (loan, bonding, equity, or other)

Did you receive a capital award? Yes  No

If yes, what was/were the Dollar Amount(s) of the capital obtained?

Date: 08/09/2022 \$ 23000000 From Whom:

DOJ

Date: \_\_\_\_\_ \$ \_\_\_\_\_ From Whom:

Date: \_\_\_\_\_ \$ \_\_\_\_\_ From Whom:

### Job Opportunities Created

New Jobs Created: 5,000

b. Jobs Retained: 14,000

Pursuant to the client responsibilities outlined in Section (d) of the MBDA Internal/External Client Engagement Form, please provide any and all documentary evidence (contract award documents, agreements, etc.) to your servicing MBDA Business Center Program or MBDA Business Development Specialist as evidence of the above transaction(s). All documentation will be kept on file and confidential within the MBDA Business Center. MBDA and MBDA Business Center Programs will take reasonable action to restrict access to such information by non-governmental entities. All information will remain confidential to the fullest extent of the law.

Please provide a brief narrative description of the MBDA services provided to your firm:



# DocuSign – Client Transaction Verification Form

Client provides description of services received and clicks to sign document



Please provide a brief narrative description of the MBDA services provided to your firm:

They helped \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_.

I hereby certify that the information and statements provided in this document are truthful and accurate representations of the transaction(s) that occurred as a result of MBDA's services. I also certify that all verifying documents are authentic and accurately represent the transaction(s) referenced above.

Client Firm Name: Daily Planet Newspaper

Print Name: Lois Lane

Authorized Client Representative Lois Lane Title CEO

Signature:  \_\_\_\_\_  
DocuSigned by:  
Lois Lane  
B5E614F93A4F5447

Date: 8/18/2022

 8/18/2022  
DocuSigned by:  
Clark Kent  
C8E1F7625CA44DF

Clark Kent