

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.

Client Engagement Form Document for your DocuSign Signature

Clark Kent via DocuSign (dse_NA4@docuSign.net)

To: you [Details](#) ▾

DocuSign



Clark Kent sent you a document to review and sign.


REVIEW DOCUMENT

Clark Kent
mbdajerry@yahoo.com


I am sending you this request for your electronic signature, please review and electronically sign by following the link below.

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

Please Review & Act on These Documents **DocuSign**

 **Clark Kent**
Carahsoft OBO Minority Business Development Agency (MBDA)

I am sending you this request for your electronic signature, please review and electronically sign by following the link below.

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE **OTHER ACTIONS** ▾

Client receives
digital document
and reviews

Minority Business Development Agency Program Services

MBDA Internal/External Client Engagement Form

The U.S. Department of Commerce Minority Business Development Agency's (MBDA) mission is to foster the growth and global competitiveness of U.S. businesses that are minority-owned. MBDA accomplishes its mission by facilitating transactions through referrals, business consulting, contract bid/proposal preparation, loan packaging, and/or matching contract opportunities and capital sources (i.e. loans, equity, bonding, etc.). In addition, MBDA helps clients to achieve their growth objectives by connecting them with prospective strategic partners through business-to-business matching, teaming arrangements, joint ventures, or other strategic advisory services.

Acknowledgement of Client Relationship

Daily Planet Newspaper _____ ("client") has engaged with MBDA for business consulting or other services. The services provided by MBDA and/or MBDA Business Centers to the client are subsidized through Federal appropriations. MBDA agrees to provide one or more of the following services:

- | | |
|---|---|
| <input checked="" type="checkbox"/> business consulting | <input checked="" type="checkbox"/> business match-making |
| <input checked="" type="checkbox"/> contract opportunity sourcing | <input checked="" type="checkbox"/> capital sourcing |
| <input checked="" type="checkbox"/> other services (describe) <u>Specialized Training</u> | |

MBDA does not guarantee any particular outcome or business result on behalf of the client or associated third parties and is not liable for any outcomes or business decisions made by the client or associated third parties.

Acceptance of Client Relationship

The client agrees to: (a) acknowledge the relationship with MBDA (as demonstrated in this agreement); (b) provide firm contact and profile information; (c) disclose outcome(s) based on the services provided to the client by MBDA and/or MBDA business centers to MBDA and/or MBDA business centers; and (d) provide documentary verification to MBDA and/or MBDA business centers for transactions resulting from services provided pursuant to this engagement.

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

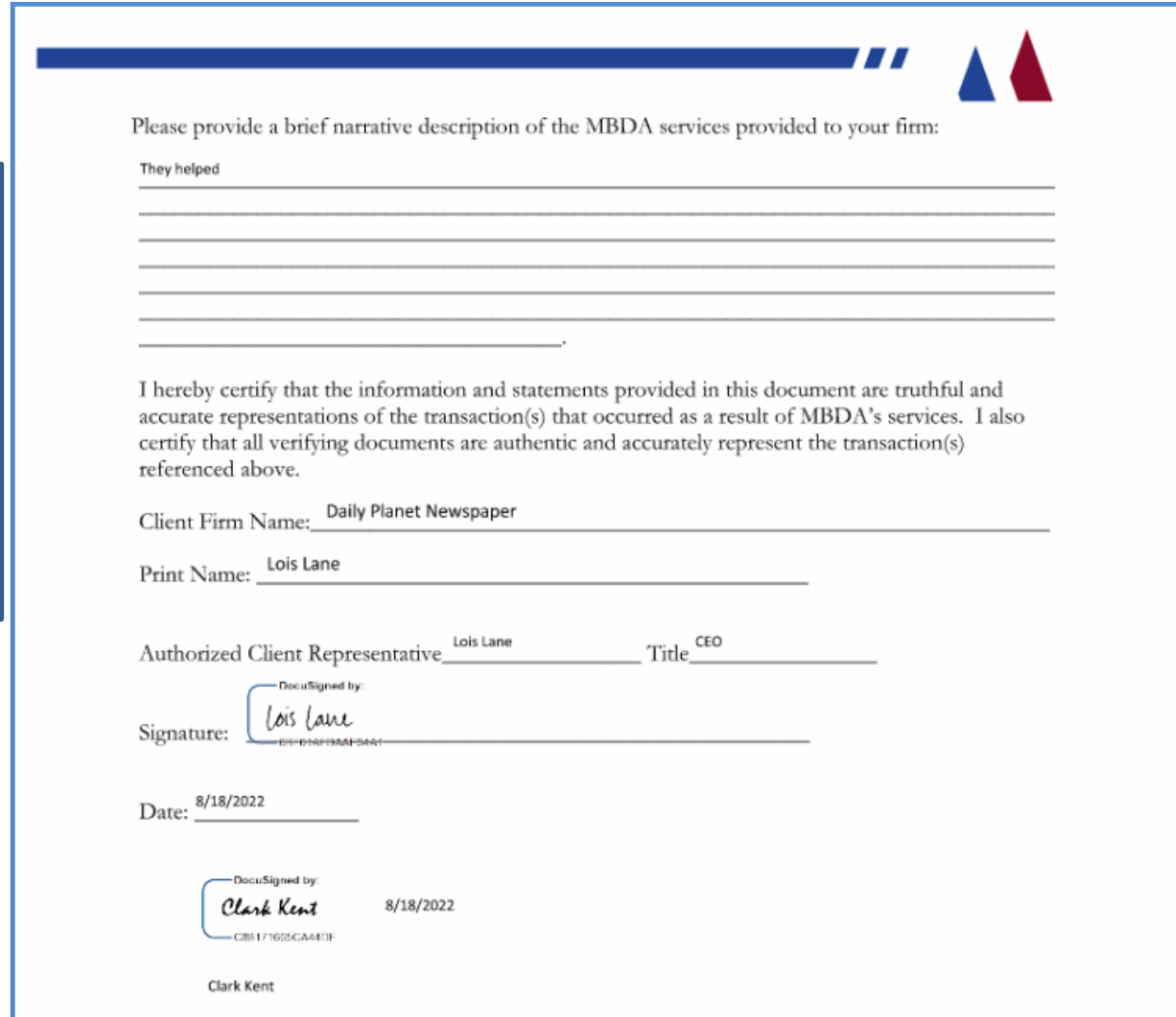
b. Jobs Retained: 14,000

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.

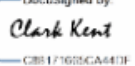
Client Firm Name: Daily Planet Newspaper

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