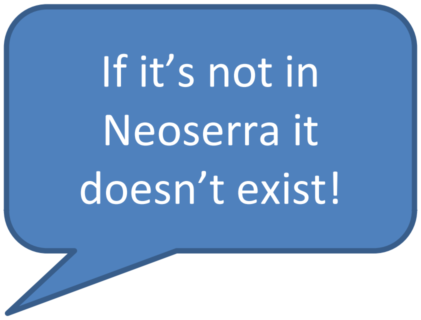
NEOSERRA

BASIC TRAINING

July 2018

Neoserra Web Site: https://illinois.neoserra.com

Mark Petrilli says:



Opening Screen

Center Profile: Ensure accuracy of data
Center, Accounts, Advisors

Click on any BLUE NUMBER to see component data

Boxes on Right of Screen

Top Box
eCenter Notifications
New Sign ups
Public center link
Public conference link

eCenter Client sign-ups on right of screen

Lower Box: Summary of Center Activity

Upload Documents

Client Sign Up

1. Best for new clients to enroll through eCenter Direct
2. If they call send them to your eCenter Direct link
   They fill out the client profile so you do not
      Check and complete the profile with as much detail as possible
3. Neoserra automatically checks for duplicates
   DO NOT accept duplicate clients
   We can work with their existing profile
      If you see duplicates Becker can Merge them; centers do not have this Permission

Tabs at Top of Page

View: Center, Advisor Client & Contact Profiles, Training Events, Surveys, Dashboard

1. The basic info and access to their activity
2. Includes how many, if any, employees a client has when they first come to you
3. Base further additions on this initial employee count
4. List training events here

Activity: Counseling, Awards, Milestones, Capital Funding, Narratives, Inquiries, eCenter Updates, Survey Responses, Professional Development

1. Enter most important data here
   a. Advising time
   b. Impact
   c. Success Stories
   d. Narratives
   e. Professional Development

Manage: View data here

1. Scorecards
2. Filters
3. Reports

Help: Access to Neoserra assistance

1. FAQ’s
2. Webinars

Tabs in Detail

View Tab

Clients

1. Filter for clients
2. Add new clients
    a. Clients should enroll through eCenter Direct
    b. **New Button** at top right
        i. Complete as much info as possible
        ii. Red Starred fields are mandatory

Contacts

1. People who sign up for Trainings through eCenter automatically become Contact
2. People who will never be clients can be contacts
    a. Capture their info and contact them using Neoserra

Advisors

1. Can edit Advisor data here
2. Filter for Advisors across the IL SBDC Network with expertise you may need

Training Events

Adding Training Events

New button

1. Schedule training events
2. Red starred fields mandatory
3. SBA 888? Default checked so training counts to SBA

Neoserra will calculate all fee and attendee demographic data based upon attendees listed? ☑

Defaulted: Neoserra adds up payments

To post Training on eCenter

eCenter

Post this event on eCenter? Public

Fees = Distribution

Distribution to SBA: $

Distribution to SCORE: $

Distribution to SBDC: $

Distribution to Cosponsor: $

Training attendees listed in Neoserra become contacts.
Now in your data base and easy for you to contact

<u>Activity Tab</u>

Enter advising time & milestones here

1. Counseling (Advising): Hours
2. Milestones: Change in Staff (Jobs Created), Jobs Retained, Started a Business, etc.
3. Capital Funding: Loans, Owner Investment etc.
4. Professional Development
5. Narratives

The **NEW** button
The **REPORTABLE** button

Counseling:

To add advising time:

Must complete Red Starred fields
Include Prep, Travel (if any) and Contact time
Good notes crucial
Admin time does **NOT** count toward your goals

REPORTABLE box Checked

Uploading docs: This is a great feature to help your center be as paperless as possible.

Awards: Used by PTAC unless you get an SBIR or STTR

Milestones: To add Change in Staff (jobs created), Jobs Retained, Started a Business, Expansion, etc.

1. **Client MUST have at least one advising session for milestone to count**
2. **Milestones must be attributable to the assistance you have provided the client. The "but for" clause**

   SBA Language on the Impact form:
   The results above can be attributed, in whole or in part, to the assistance received from the IL SBDC at . . .
3. **Remember: Reportable box!!**

Change in Staff:

Must know Initial number of staff

Change in Staff = Initial # + number you are adding
You must do this aggregation to show a + milestone

Job Type: Mandatory
Job Title: Desired

Symbol to left of the Change in Staff milestone will show in green to show a positive milestone. If red or blue there is a problem

Jobs Retained:

Milestone Amount: Enter # of jobs retained. **No aggregation** necessary.

Symbol to left of Jobs Retained milestone will be any color

Jobs Retained can be counted once every 2 years

Started Business:

Starting a Business may create several Milestones

- Change in Staff
- Capital Funding
  - Loan
  - Owner Investment
- Success Story

Expansion: Probably a Change in Staff, Jobs Retained and/or Capital Funding milestone also

Success Story: Minimum of 6 annually

SBDC Lead Center can use these publicly in Weekly Connection and in other publications

Get quote from client on how the SBDC helped

Capital Funding: Loans, Owner investment, Grant etc.

See Funding Type dropdown: Choose one

Must Complete:

All red starred fields
Date completed
Amount Requested
Amount Approved

Inquiries: Do **NOT** put Professional Development here.

Narratives: Each quarter should describe significant center achievements, events, initiatives

Professional Development: Training **you** receive

IESBGA, ASBDC, NASBITE, APTAC

Choose only Continuing Education or Certification when entering "New" Pro Dev.

Only these 2 types are counted toward your goals

Outreach: Presentations to chambers, business orgs, schools, media appearances etc.

Also consider adding these to **Narratives**

Manage Tab

Scorecards

Use to chart your progress. Provide additional data than what is in the Goals Scorecard Graph

Generate Scorecard: Choose from dropdown

Most widely used:

Economic Impact/Capital Infusion (2007)

Jobs, capital funding etc.

SBA Quarterly Case report: Demographic info

SBA Training Report

SBDC Program Review Report Current

SBDC Network Coordinators use when doing the program review at your center

Filtering: Extracting data from Neoserra

Crucial to choose proper filter

Click on Blue Ribbon

Example: Counseling Sessions by Advisor Activity

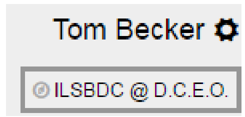
Counseling
Blue Ribbon
Session Date
Session Type: Any Initial/Follow up
Reportable

Reports: Top Right Corner
Reports
Dropdown: Summary of Counseling by Center/Advisor Client Hours Summary

Neoserra Postbox

Allows you to create an advising session from an email you sent using your default email application.

Name (Top right)



Preferences

Can change your password here

Postbox (near bottom)

Copy Private email address in dark gray

Make contact in your default email application with this address.

After use a few times the email application should recognize the address if you type if first few characters

When sending emails to clients you will see a green bar & green bubble alerting you on the Neoserra home page

Email: Can use Neoserra to email clients & contacts

Some centers find Constant Contact better

Email Option Available under

- View
  - Contacts
  - Clients
- Advisors

Run a Client filter

- View
  - Clients
    - Set Filter

See Email in top right of screen

Choose from options below:

View : **(Filter)** (144 Companies)

- ○ Use the email address of the companies
- ○ Use the email address of the primary contact for each company
- ● Use the email address of all contacts of all companies

Only include email addresses where the **subscribe to email** check box is checked? ☐

Generate email address list for export to external email client? ☐

Format: Outlook (semicolon delimited) ▾

Options:

Can CC or Bcc
Add attachment(s)
Compose Message

See boxes at bottom of page:

☐ Send a copy of each delivery to myself? (tom.becker@illinois.gov)

☐ Save message as a counseling session?

Cancel Send

FAQ's

Trainings & Webinars (top right)
Scroll down to Webinars & Eco Friendly Training