

# Companies Modules Classified by Stage

MassConnect CRM - Windows Internet Explorer


http://www.massconnectcrm.com/index.php?module=Accounts&action=index

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★ Favorites MassConnect CRM

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Home Companies Company Info Partners Application / Certification Business Development Events Activities Reports Other

All Companies Potential Qualified Applied Certified

Last Viewed: AP-IR stage doe Yard Arms Lands 20080020 test001 111120 111120 Certification f Mr. Po-Shang Chen

Search

Shortcuts

- Create Company
- Companies
- Company Reports
- Import

**Companies: Home** [Print](#) [Help](#)

Basic Search Advanced Search

Name  City  Phone Office

Address  Only my items

Search Clear | Saved Searches --None--

**Company List**

Select  Delete Export Merge Duplicates Selected: 0 (1 - 100 of 434)

<input type="checkbox"/>	Company Name	Company Type	Certification Type	City	Phone	Team	User
<input type="checkbox"/>	Zen Industrial Services LLC	Certified Company	DBE	Rye Brook	(914)906-0021		Administrator
<input type="checkbox"/>	YWCA of Western Mass	Certified Company	WBE	Springfield	(413)732-3121		Administrator
<input type="checkbox"/>	Young Women's Christian Association of Central Massachusetts Inc.	Certified Company	WBE	Worcester	(508)791-3181		Administrator
<input type="checkbox"/>	Yard Arms Landscaping	Certified Company	MBE	East Harwich	(508)432-0196		Administrator
<input type="checkbox"/>	Yard Arms Landscaping	Certified Company	DBE	East Harwich	(508)432-0196		Administrator
<input type="checkbox"/>	xvz		-blank-		123		Administrator
<input type="checkbox"/>	Write Design The	Certified Company	DBE	Keene	(603)352-5626		Administrator
<input type="checkbox"/>	Write Design The	Certified Company	WBE	Keene	(603)352-5626		Administrator

# Certified Companies Module


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Accounts&action=index&typed=certified

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All Companies | Potential | Qualified | Applied **Certified**

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Shortcuts

- Create Company
- Companies
- Company Reports
- Import

**Companies:Certified** [Print](#) [Help](#)

Basic Search  Advanced Search

Name  City  Phone Office

Address  Only my items

Search  Clear  | Saved Searches --None--

**Company List**

Select  Delete  Export  Merge Duplicates  Selected: 0  (1 - 100 of 432)


<input type="checkbox"/>	Company Name	Company Type	Certification Type	City	Phone	Team	User
<input type="checkbox"/>	Zen Industrial Services LLC	Certified Company	DBE	Rye Brook	(914)906-0021	Administrator	<a href="#">?</a>
<input type="checkbox"/>	YWCA of Western Mass	Certified Company	WBE	Springfield	(413)732-3121	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Young Women's Christian Association of Central Massachusetts Inc.	Certified Company	WBE	Worcester	(508)791-3101	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Yard Arms Landscaping	Certified Company	MBE	East Harwich	(508)432-0196	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Yard Arms Landscaping	Certified Company	DBE	East Harwich	(508)432-0196	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Write Design The	Certified Company	DBE	Keene	(603)352-5626	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Write Design The	Certified Company	WBE	Keene	(603)352-5626	Administrator	<a href="#">?</a>
<input type="checkbox"/>	Wristies Inc.	Certified Company	WBE	Lowell	(800)811-8290	Administrator	<a href="#">?</a>

# Company Info Modules

Track management, controlling interest, sales & revenues

MassConnect CRM - Windows Internet Explorer  
http://www.massconnectcrm.com/index.php?module=SR\_SaleRevenue&action=index

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Management Personnel Controlling Interest **Sales & Revenue**

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**Sales & Revenue** [Print](#) [Help](#)

Basic Search Advanced Search

Company  Select Year  Gross Sales

Search Clear Saved Searches --None--

**Sales & Revenue List**

Select Delete Export Selected: 0 (1 - 1 of 1)

<input type="checkbox"/>	Company	Year	Gross Sales	Net Sales	Net Profit
<input type="checkbox"/>	<a href="#">Accu-Clean Inc.</a>	<a href="#">2007-08</a>	243,000	23,000	12,000

Select Delete Export Selected: 0 (1 - 1 of 1)

Delete

Theme Sugar

Server response time: 1.14 seconds.  
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# Certification Module - Create Certification and track stage


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Quotes&action=EditView&return\_module=Quotes&return\_action=DetailView

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Application | Certification

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Shortcuts

- Create Certification
- Certifications
- Certification Reports

**Certifications: Certification for:** [Help](#)

Save Cancel

Certification Number: Application-Receipt  
Application - To Be Assigned  
Application-Initial Review  
CM Requests Docs  
Application-Site Visit  
Application-Evaluation  
Application-Site Visit Report  
Documents Requested  
Compliance Ready  
DA Requests Docs  
Due Diligence  
Administrative Review  
Certification Review  
Certified  
Rejected  
Pending

Clear

Clear

Company Name: \*

Certification Title:

Application Number:

Application Type:

Certification Stage: \*

Certification For: MBE  WBE  DBE

Team: \* (admin) Select Clear

Notes:

Certification Action:

Support Documents Received: Yes

Application: Browse...

Site Visit Report: Browse...

Compliance Report: Browse...


Date of Receipt:

Assigned to: Administrator Select Clear

# Application Module

MassConnect CRM - Windows Internet Explorer  
http://www.massconnectcrm.com/index.php?module=apps\_appform&action=index

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Application | Certification

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Shortcuts  
Create SOMWBA Application  
SOMWBA Applications

### SOMWBA Application

Basic Search Advanced Search

Application No  Company Name  Select Certification Type   
Address City  Only my items

MBE  
WBE  
DBE  
M/WBE  
D/MBE

Search Clear | Saved Searches --None--

### SOMWBA Application List

Select Delete Export Selected: 0 (1 - 5 of 5)

Application No	Company Name	Certification Type	Address City	Assigned to
<input type="checkbox"/> 001		MBE		Administrator
<input type="checkbox"/> 20081111		MBE		Administrator
<input type="checkbox"/> test001		MBE		Administrator
<input type="checkbox"/> 120021	Accord Vending Inc.	M/WBE		Admini
<input type="checkbox"/> 20080020		M/WBE	NEW CITY	Administrator

SCROLL LOCK: OFF

# Business Development Module - Create Tracks for both applicants and partners


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Opportunities&action=EditView&return\_module=Opportunities&return\_action=DetailView

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Home Companies Company Info Partners Application / Certification **Business Development** Events Activities Reports Other

Contacts **Business Development**

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Shortcuts


- Create Business Development Track
- Business Development Tracking
- Business Development Tracking Reports
- Import

### Business Development Tracking

[Save](#) [Cancel](#)

Company Name: \*  [Select](#) [Clear](#)

Bus.Dev.Tracking Name: \*

Expected Close Date: \*  

Lead Source:

Next Step:

Referred By:  [Select](#) [Clear](#)

Temperature:

Team: \* (admin)  [Select](#) [Clear](#)

Applicant Stage: \*

Certification Type:

Assigned to: Administrator  [Select](#) [Clear](#)

Partnership Stage:

Notes:

[Save](#) [Cancel](#)

Applicant Stage dropdown menu:

- Applicant - Discovery
- Applicant - Workshop
- Applicant - Follow up
- Applicant - Receipt
- Closed

# Business Development Module - Create Contact


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Contacts&action=EditView&return\_module=Contacts&return\_action=DetailView

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Contacts Business Development

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Shortcuts

- Create Contact
- Enter Business Card
- Create From vCard
- Contacts
- Contact Reports
- Import

**Contacts:** [Save](#) [Cancel](#) [? Help](#)

**CONTACT INFORMATION**

First Name:	<input type="text"/>	Office Phone:	<input type="text"/>
Last Name: *	<input type="text"/>	Mobile:	<input type="text"/>
Company Name:	<input type="text"/> <a href="#">Select</a> <a href="#">Clear</a>	Home:	<input type="text"/>
Lead Source:	<input type="text"/>	Fax:	<input type="text"/>
Title:	<input type="text"/>	Birthdate:	<input type="text"/>
Department:	<input type="text"/>	Gender:	Male <input type="text"/>
Reports To:	<input type="text"/> <a href="#">Select</a> <a href="#">Clear</a>	US Citizen:	Yes <input type="text"/>
Sync to Outlook@:	<input type="checkbox"/>	Assistant:	<input type="text"/>
Do Not Call:	<input type="checkbox"/>	Assistant Phone:	<input type="text"/>
Team: *	<input type="text"/>		

# Activities Modules

## Schedule calls, meetings & tasks, sync calendars


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Activities&action=index

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Home Companies Company Info Partners Application / Certification Business Development Events **Activities** Reports Other

Activities Calendar Emails Calls Meetings Tasks Notes

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Search

**Activities: Home** [Print](#) [Help](#)

Basic Search Advanced Search

Subject  Contact  Only my items

Search Clear Saved Searches --None--

**Call List**

Select Delete Export Selected: 0 (1 - 1 of 1)

<input type="checkbox"/>	Close	Direction	Subject	Contact	Related to	Start Date	Team	Assigned User
<input type="checkbox"/>	X	Inbound	<a href="#">test phone logs</a>		<a href="#">A Pereira Construction Company Inc.</a>	10/28/2008 14:00	(admin)	Case Manager

Select Delete Export Selected: 0 (1 - 1 of 1)

**Mass Update**

Update

Start Date:  (mm/dd/yyyy) Related to:  Select

Status: --None-- Direction: --None--

# Reports Module

Generate custom reports at the click of the mouse


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=Reports&action=index

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Home Companies Company Info Partners Application / Certification Business Development Events Activities **Reports** Other

Reports

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Search

Shortcuts

- Create Custom Report
- My Favorite Reports
- All Reports

**Reports: Home** [Print](#) [Help](#)

Basic Search  Advanced Search

Title:  Only my items:

Module: 

- All Companies
- Application
- Applied
- Business Advisors
- Business Development

 Report Type: 

- Rows and Columns
- Summation
- Summation with details

 Assigned to: 

- Administrator
- Achameyesh Assefa
- Auditor Auditor
- Case Manager
- DA DA
- David Cullinane

Search Clear | Saved Searches --None--

**Report Search**

Select  Delete  Selected: 0 (1 - 19 of 19)

<input type="checkbox"/> Report Name	Module	Report Type	Date Created	Team	User	Schedule Report
<input type="checkbox"/> <a href="#">Applications Certified</a>	All Companies	Rows and Columns	07/13/2008 20:11	(admin)	Administrator	-- none --
<input type="checkbox"/> <a href="#">Applications Denied</a>	All Companies	Rows and Columns	07/13/2008 20:13	(admin)	Administrator	-- none --
<input type="checkbox"/> <a href="#">Applications on Hold with Reasons</a>	All Companies	Rows and Columns	07/13/2008 20:15	(admin)	Administrator	-- none --
<input type="checkbox"/> <a href="#">External Meeting Logs</a>	Meetings	Rows and Columns	10/05/2008 21:14	(admin)	Administrator	-- none --

# Other Modules

## Track NAICS codes, projects, and more


MassConnect CRM - Windows Internet Explorer

http://www.massconnectcrm.com/index.php?module=zz\_Work&action=index

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Ownership NAICS **NAICS Catalog** Projects

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Shortcuts

- Create NAICS Code
- NAICS Code
- Import

**NAICS Code** [Print](#) [Help](#)

Basic Search Advanced Search

Search Clear | Saved Searches --None--

**NAICS Code List**

Select   Selected: 0 (1 - 100 of 19715)

NAICS Code	NAICS Description	NAICS Sub Description	Size Standard
<input type="checkbox"/> <a href="#">111110</a>	Soybean Farming	Soybean farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Canola farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Flaxseed farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Mustard seed farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Oilseed farming (except soybean), field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Rapeseed farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Safflower farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Sesame farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111120</a>	Oilseed (except Soybean) Farming	Sunflower farming, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111130</a>	Dry Pea and Bean Farming	Bean farming, dry, field and seed production	0.7500
<input type="checkbox"/> <a href="#">111130</a>	Dry Pea and Bean Farming	Cowpea farming, dry, field and seed production	0.7500