

Easy Notes Record Of Conversation (ENROC) V 1.0

Contact Information

Name: Company:

Contact | Address | Data | Profile

Work: Mobile:
 Home: Fax:
 Email: Title:
 Notes:

Record Event / Conversation

Click on the Flags or lock to set Contact Groups or Privacy

09/08/2013 10:52:22 A - John rang said he is happy with the marketing plan and wants to go ahead with its implementation.
 31/07/2013 5:17:39 P - Met with John and discussed new ways to market his company online using Internet Marketing Small Business www.imsb.com.au

ENROC is a simple online Customer Database. It holds all of your contacts details, profiles, conversations, notes and events. It has reports, event logs and keeps sensitive data secure.

Once you create a new customer you progressively build a profile of that contact by keeping notes on conversations, events and other pertinent information; and, everyone in your business can access and contribute. It's a bit like a detective collating data to profile a suspect, only in this case you want to get to know your customers. That is, build a relationship. And, because the information is available everywhere and shared in real time with all users; everyone contributes to building the relationship. This collaboration in a small business is gold, and it is amazing how it keeps customers on their toes and gives you a significant advantage in any negotiation be it a sale, purchase or any deal.

ENROC is web based so no IT overhead or propeller heads required. And, it's on all platforms, including smart phones.

ENROC is a Contact Manager with Notes for Small Business. It also makes a great List Manager for Email List Marketing.


Email List Marketing

In a nut shell, one the most cost effective marketing strategies available to small business is called Email List Marketing. Build a list of your customer's email addresses and using a bulk e-mailer, send out weekly emails to the list reminding people of all the good things you are doing and how great your product or service is. The email can be as simple as a product of the week or advice of the week, if you run a service business; or just a personal note.

Building the list is the most challenging part of list marketing. ENROC is a very simple way of managing the contact data. There are a bunch of bulk e-mailers out there. I like Mail Chimp, www.mailchimp.com.au , and it's free for the first 2,000 contacts.

Build a list of contacts using ENROC. Export the list to Mail Chimp. Develop email campaigns in Mail Chimp and send regular emails. Each week grow your contacts in ENROC, import into Mail Chimp, and repeat the process.

Your Free Trial Offer

Please go to www.enroc.com.au/prices and click  for the plan that best suits you. Complete the registration details and start the trial. You can then log in with your email address and the password you created. Additional Users can be created by you, the Client Master, in the ENROC application.

Have a look around the application and follow the steps below and create a Contact or two then you will be able to see most of the functions. Contacts can be imported from any .csv file.

Quick Start Steps:

1. Enter a name in the **Name** field, example John Smith
2. Click the + button, wait for a moment while information is sent over the internet
3. Enter a Company name (optional)
4. Click the + button, wait for a moment while the record is saved
5. Add more information, in the respective fields or click the **New/Done** button to finish
6. To retrieve a customer's record, enter their name in the **Name** field and, wait just a moment, when the contact appears; click their name. Please note if you enter the name over the top of an existing name you will effectively change the name of that record. Good practice is to click the **New/Done** button first and wait just a moment for the internet to respond and prepare the web page, then search a name

Create a new customer record or retrieve an existing one, and start adding any additional information like contact numbers, addresses, email and Notes about this person. You can also add a short note in the **Record Event / Conversation** field. These short notes will be

saved in chronological order, newest to oldest, and are all viewable on the front page, to all Users.

When you are done or wish to create a new record, click the **New/Done** button

To retrieve a customer's record, enter their name in the **Name** field and wait just a moment, when the contact appears; click their name

Contacts can also be imported from any .csv file. However, it's a good idea to verify the contacts first so you don't import junk data. Click the **More** button then **Utilities**

Whoever creates the ENROC account is the Client Master and has full authorisation to create new Users, assign Users to Groups, import records, upgrade subscription and create Profile lists. The Client master can also add this responsibility to another User by making them a Superuser. Click **More** button and **Users | Groups | Utilities | Profile & Settings**

Another way to retrieve a Contact or to see all Contacts is to click the **Contacts** button then select a **Letter** or use the **Filters**. You can also create reports and **Export to Excel**

Click the **Events** button to see a chronological list of all event/records of conversations. You can **Search** on any words in the event details to locate a particular event/record. This is really handy when you are trying to remember who you spoke with about 'something'.

Use the **Reports** button to create reports and export to MS Excel for sorting, filtering, uploading to bulk emailers, or printing

Click **Forms** to create and save reports

Use **Data #1** to **Data #6** as free fields to record any information. This information can be exported to MS Excel for analysis, printing etc

Use **Profile #1** to **Profile #2** to select information from pull down lists. These lists can be created by clicking **More** and **Settings** and editing each respective **Profile**. Please note that all contact records must be closed for the Settings button to appear (click **New/Done** first)

Open a Contact's record. Click the magnifying glass to the left of the **Record Event / Conversation** field to see a chronological list of events for that Contact. You can print this list or email by clicking the **Email** button and **Sending Page by Email** (depending on your browser)

To **Delete** a contact record; open the contact by entering their name and click delete

To use **Privacy Mode** click **Switch to Privacy Mode**. All of your contacts, records of conversation and all data will be invisible to everyone except you.