



Daylite Introduction Course

8:45am - 5:15pm

Course Outline

Overview of Daylite concepts

To get the most from Daylite it is important to understand what Daylite is trying to help you do. This section takes participants through the Daylite concepts and serves as a reference for better understanding Daylite.

Overview of the Interface

Daylite can look deceptively simple. At first glance it is not uncommon for a new user to think that they understand Daylite only to find later that things are out of control. It is very important that all users understand the numerous tools and interfaces and how best to use them to achieve their objectives.

Creating Contacts & Organisations

This is where most users start to work with Daylite... and right away start to see differences with using a simple address book type application. This section introduces users to concepts of linking, roles, relationships, categories and keywords. We will focus on the right way to set up cards and card relationships.

Scheduling Appointments and Using the Calendar

Daylite has been designed as a small business workgroup tool. And it is when used in a workgroup that Daylite's features really come into play. Something as common and simple as a calendar, when fully analysed, soon becomes complex when it is driving a business of many people. In this section we will be looking at how to set up calendars effectively in Daylite for many different business types. We will look at some of the common problems that can arise when they are set up incorrectly. We will set up Daylite to drive complex user notifications such as email and SMS.

Creating linked objects (notes, emails, tasks...)

As you start to apply the Daylite concepts you will be linking many objects such as notes, tasks, meetings, emails, forms, letters, file references and web links. This section will focus on the role of the various objects, what can and cannot be linked and why these might need to be linked. This section will also look at how best to view the linked objects.

Workflow Topics:

Setting up Daylite to work effectively... working smarter

How to avoid the common frustrations when working with Daylite and set up working spaces that are optimised for the types of activities you need to complete... are you task oriented, project oriented, people oriented or management oriented. Daylite can accommodate all of them.

Using Opportunities (making them, sending estimates, tracking tasks, reporting)

This section focuses on using Daylite's sales and opportunity management system to track and convert more sales. We will cover sales segmentation, sales pipelines, using task sets (called activity sets). Working with estimates, products and services.

Using Projects

This section will cover the basics of Daylite project management. When and why would you use Daylite to track projects. We will analyse some common project scenarios, we will look at project reporting and tracking for reporting and billing.

Working with the Daylite Mail Integrator (DMI)

A huge amount of our collective daily work involves working with emails and this is where Daylite really shines. By using the DMI users can perform common tasks right from the email application. Some examples are, adding contacts, setting tasks, opening new sales opportunities, tracking projects, linking important documents.

Getting the right Data Out - Smart lists, live lists and reports

Like any powerful database the old adage of garbage in - garbage out holds true with Daylite. There are a number of different ways to get to the data you require. In this section of the course we will be looking at how to access and find data. Including, filters, finds, smart lists, print layouts and reports.

Clever customer communication

Daylite can really improve communication productivity with its built in letter templates and mail merge features. We will look at email communication, letter templates, external merge keys for merging with Office docs and Omnigraffle. And we will look at running an email marketing campaign.

Please bring:

An Apple Laptop computer, a USB key, and a working copy of Daylite so you can follow the on-screen lessons. If you need help setting this up prior to the day please contact us.



Daylite 5 Training Overview 2014

AM Session

Time	Topic	Learning Outcomes
8:45	Setup	Attendees to prepare for the session, have Laptop with Daylite running and Mac Mail. Students will receive course notes on a USB stick
9:00	Introduction	Lecturer and attendees to introduce themselves and say what they hope / expect to get from the day.
9:10	Intro to Daylite	What is Daylite, why was it developed and what makes it special and different to other applications <ul style="list-style-type: none">• Critical Daylite Concepts• The Daylite ecosystem
9:30	GUI	The Daylite Graphical User Interface: <ul style="list-style-type: none">• Daylite Terms and nomenclature• The preferences• Accessing the sample database• Managing syncing on Mac and iOS devices• The sections of Daylite
10:00	Basic Preferences	Setting up the Personal Preferences area
10:15	Structuring Data	Introduction to the ways that Daylite managing data <ul style="list-style-type: none">• Categories & Keywords• Roles and Relationships• Opportunity Types• Company Settings & Labels• Data linking and inheritance
10:30	Break	
10:50	Database setup	Setting up a database to manage data and data structures effectively; when to use categories, and keywords and when to use other mechanisms. Planning data tagging to obtain effective outcomes
11:15	Daylite CRM	Introduction to Daylite's powerful CRM features and tools <ul style="list-style-type: none">• Adding people and companies• Recording and accessing contact history and activities• Working with Email• Notes Tasks and Appointments• Reporting and tracking critical contacts• Working with Roles• The power of objectives• CRM Smart Lists• CardDav (Address Book and iPhone)• Web Forms
12:15	Lunch	



PM Session

12:45	Objectives	Working with Opportunities and Projects in Daylite.. <ul style="list-style-type: none">• What are Opportunities and Projects• When to use them• How to set them up• Adding ad hoc activity• Working with Activity Sets and Pipelines• Tracking with Time & Budget• Objective reporting• Objective Smartlists
2:00	Task Management	Effective Task/Time Management in Daylite <ul style="list-style-type: none">• What are tasks• How should they be use• Good 'GDT' theory• Quick task entry• Using the worklist, using the worklist with T&B• Using Tasks to track time• Using Tasks with the Productivity Tools• Using Tasks with Billings Pro• Using Tasks with Email
2:45	Daylite Notes	Overview of Daylite notes
3:00	Forms	How to use forms in Daylite <ul style="list-style-type: none">• Setting up a form• When to use forms and when to use Extra Fields• Forms on iOS• Forms and some common workflows• Form smartlists
3:30	Break	
3:45	Daylite Calendar	Detailed look at using the Daylite Calendar <ul style="list-style-type: none">• My Calendar• Working with group calendars• Calendar Smartlists• CalDav• Calendar Reporting
4:20	Daylite Reporting	<ul style="list-style-type: none">• Working with Print Layouts• Working with Reports• Web Reports• iOS Summary Reports
4:45	Daylite on iOS	Working with Daylite in iOS
5:15	Q&A	Wrapping up any final questions, reviewing the parking lot.