

# Daylite 101 Training



## Description

Everything in Daylite revolves around achieving objectives. This Marketcircle Certified comprehensive 2 day course will familiarize students with the most effective workflows for getting the most out of Daylite in order to grow your business.

Understand the power of defining relationships between the people and companies you deal with including searchable email histories for everyone. Schedule meetings in minutes with shared calendaring. Systematically track every opportunity that comes your way and avoid sales slipping through the cracks. Use tasks organized into projects and learn how to quickly delegate them amongst team members.

## What You'll Learn

- Understand the Concepts behind Daylite
- Be comfortable navigating through Daylite's interface
- Be aware of new ways in which Daylite can increase business productivity
- Includes reference book containing exercises and step-by-step guides.

## Course Outline

### Lesson 1: Daylite Concepts

### Lesson 2: Overview of the Interface

### Lesson 3: Creating Contacts & Organizations

Creating New Contacts & Organizations  
Manually creating links between objects  
Understanding Roles & Relationships

### Lesson 4: Scheduling Appointments & Meetings

Creating New Appointments & Meetings  
Using the Due List Panel  
Viewing Other Users Calendars

### Lesson 5: Creating & Linking Notes

Creating a New Note  
Activity Pane Interface

### Lesson 6: Understanding DMI & Common Workflows

Preferences in Mail  
Create Contact from within Mail  
Link Mail with Contact, Project & Opportunity  
Create New Tasks, Appointments, Projects or Opportunities from Mail

### Lesson 7: Searching & Filters

Using Quick Find  
Global Search  
Using Filtered Views

### Lesson 8: Smart List Basics

Creating Smart Lists for Contacts & Organizations  
Creating Regular Lists

### Lesson 9: Bulk Edit & Forms

Using Bulk Edit for Contacts and Organizations  
Inputting Forms

### Lesson 10: Corresponding Using Daylite

Emailing from Daylite  
Performing Mail Merges from Daylite

### Lesson 11: Managing Sales using Opportunities

Creating a New Opportunity  
Create Tasks & Appointments Linked to Opportunity  
Applying an Activity Set  
Using Estimates  
Working with Pipelines

### Lesson 12: Project Tracking

Creating a New Project  
Creating Sub-Tasks and Followup Tasks  
Delegating Tasks

### Lesson 13: Generating Print Layouts & Reports

Exploring Built-In Print Layouts  
Using the Live List Print Layout  
Using the Built-In Reports

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