Daylite for film and video professionals

This database template has been designed for individuals working in the film and/or video industry or for a typical owner or manager of a film production business to help them understand how to organize information and manage their business processes more effectively using Daylite.

Overview

This template serves as your starting point in customizing Daylite to better fit your business and production processes. If you are an experienced Daylite user, you can also benefit from the use of this template by looking at the workflow and suggestions to enhance your productivity.

Film and video businesses often deal with an overwhelming number of tasks and steps required to successfully complete production projects. This database makes an extensive use of activity sets to help manage tasks, track deadlines and organize information more effectively using Daylite.

Production projects often require many crews and staff of different job positions. Having an updated, well-maintained set of contacts can help you easily find and manage your clients, production crew and staff with ease.

General Workflow

The following summarizes a general workflow for using this database template. However, you can adapt your existing workflow or customize this template according to your individual specifications.

1. Once you identify a prospective client, the first step is to create a new opportunity. Daylite gives you the ability to set up a pipeline to visually track how your opportunity is organized and your progress in different stages. Any tasks or appointments that you should complete for winning the opportunity should be linked to the opportunity.

2. Link the relevant contacts and organizations to the opportunity; furthermore, you can assign roles to track the responsibilities of a contact in the opportunity. As you progress, change the stages of the pipeline for the opportunity.

3. When the client confirms that they wish to do business with you, create a new project from the opportunity. Add a suitable pipeline to the project that matches the kind of work you are doing for the client.

4. As you complete work in different stages, change the stages of the project pipeline to match your progress.

Opportunities

An opportunity is a person or business who is interested in buying your products or services and will contribute towards increasing your company's revenue. When you create an opportunity, you can associate one of the following pipeline to an opportunity.

1. The **New Prospect** pipeline is used for all prospective film clients. Following the pipeline can give you a sense of how close you are in confirming the business and if any follow-up is required to secure the business.

2. The **Hiring Crew** pipeline is used for all prospective crews that you would like to hire for your production projects. The pipeline can help you track the communication between you and the crew until the crew signs the contract.

You are encouraged to set up and customize your own pipelines to have more specific workflow that better fit your business processes.

Projects

Projects are a powerful tool for planning, managing, and organizing information essential for businesses to succeed. In this database template, you can assign the following pipeline to projects.

1. The **Film Production** pipeline is useful for tracking all your film production projects. The stages of the pipeline starts with the film development stage until the final product is distributed and the invoice is received.

If you require specific pipelines for different types of filming projects, you can set up and completely customize new pipelines to suit your needs.

Contacts

Contacts are the people you do business with. In this template, there are categories such as such as *Client*, *Cast*, *Crew* to define the contact's connection to your business. Moreover, there are keywords such as *Talent*, *Sound*, *Editor* to further describe your contacts in this database.

Contacts are linked together by relationships. You can specify relationships such as *is a director of*, *friend of* and more. You can fully customize these relationships to better suit your needs.

Suggested Workflow:

1. Add a new contact.

2. Fill in all the essential information.

3. Assign a category to characterize your contact.

4. Add keywords to further distinguish your contact. For example, a sound crew should have the category *crew* and the keyword *sound* tagged to its profile. You are encouraged to keep a short list of categories and a longer, more extensive list of keywords.

5. Link contacts together with a relationship. Simply drag and drop one contact onto another to create the link. Select the correct relationship description establish a relationship between the two contacts.

Organizations

Organizations are a collection of contacts linked to a larger legal entity. Similar to contacts, you can assign categories and keyword(s) to organizations. Linking a contact with an organization allows you to specify a role, such as *customer*, *decision maker*, *employee* or *main contact* played by the contact in that organization.

Tasks

A task is a piece of work to be undertaken. You can create tasks and assign a status, category, due date, start date, complete date, estimated time, and set reminders to alarm you about an upcoming task. In this template, we have categories such as *Administration, Film Work, Auditions/Interviews* to distinguish the tasks.

Appointments

An appointment is an activity that is restricted to a certain time on a specific date. You can create appointments and assign a status, category, start date, start time, end date, end time, duration and set up reminders. In this template, we have categories such as *Consultation, Client Meeting, Film Shoot* to further characterize the appointment.

Activity Sets

An activity set is a template of tasks and appointments that tend to be repeated frequently. Activity sets are useful for workflow that needs to be completed in a specific order or is time sensitive. Activity sets reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has five different activity sets:

1. The **Development** activity set defines the tasks associated with the development stage of film production. These tasks include prepare synopsis, step outline and treatment.

2. The **Pre-Production** activity set includes the tasks required to prepare for the film shoot. These tasks include booking crews, reviewing props and site surveys.

3. The **Production** activity set includes the tasks required for shooting and the appointment that outlines the time and date of the film shoot.

4. The **Post-Production** activity set includes all tasks and appointments required to perfect the film. This includes editing sessions and client reviews.

5. The **Distribution** activity set includes all tasks required to print proofs and getting them ready for presentation.

You can create your own activity sets for items in Daylite with specified relative dates, which are replaced with real dates as the activity set is applied. Daylite gives you the ability to customize activity sets so you can add, remove and edit tasks and appointments to better suit your film and video business.

Suggested Workflow:

1. Recognize any business process that you do repeatedly for multiple customers.

2. Create a new activity set in Daylite.

3. Assign the activity set to a project or opportunity or any other item in your database.

Groups

A group is a collection of contacts, organizations, projects and opportunities. Although Smart lists can filter out content based on criteria, groups allow you to select these contents manually and group different types of objects together. There is one group in this database template that demonstrates the use of groups.

The *Talent Search* for *CreativePro Design* group is used to track the talent auditions for CreativePro Design's film project. All associated talent's contacts are linked to this group. Moreover, there is the subgroup *Accepted* which identifies the chosen talent for this project.

Reports

This database template has two customized reports.

1. The **Executive Summary Sheet** report displays all projects that are due in six months. The report is sorted by the employee's name and includes the project name, pipeline, due date and the objective. This report gives you a convenient method to gain an overview on the progress of each employee's projects.

2. The **My Project Status** report displays the projects that are under your ownership. The report includes the name of project, pipeline, pipeline stage and the due date. If you wish to print a report for another employee, you must log into that particular employee's Daylite account.

You can also work with Print Layouts (*File > Print*) to create report style documents. Instead of outputting all the data from the database, print layouts only display the currently selected items.

Forms

A form is a collection of custom fields. A form in Daylite works just like a paper form that you use for collecting information. Daylite allows you to add forms to contacts, organizations, projects, opportunities, and/or groups in your database. This template has the following form:

1. The **Marketing Review** form can be used to track all the critiques you have received for your work. This form can assist you in tracking the essential information such as the critic's name, date that the critique was made public and where the critique is published.

You can have an unlimited number of forms in Daylite and each form typically has between 10 to 30 fields. The fields are fully customizable and you can choose to use different data entry formats such as text fields, drop-down boxes, checkboxes and more. You can also print or email forms to display the information to another party. For more details on creating forms, see Designing custom forms.

Resources

There are a number of resources to help you to learn more about Daylite and provide answers when you have technical questions.

- **Daylite 101 certified training course:** Our certified trainers deliver this course regularly all over North America. To find out more about this course and our trainers, please visit http://www.marketcircle.com/daylite/training/.

- Our support website and knowledge base have many articles that can help you solve technical difficulties. Visit http://www.marketcircle.com/help/ for more information.

- We have interactive forums where you can share ideas, tips, and questions with fellow Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.