Daylite for sales professionals

This template is a typical database of a retail sales business. It is designed to help beginners understand how to organize information and manage their business processes more effectively using Daylite.

Overview

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. You can fully customize this template and enrich the content by adding information relevant to your business.

This template makes an extensive use of pipelines to differentiate between the many different business models that sales individuals encounter.

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 four pipelines to the opportunity.

1. The **Sales Prospect** pipeline is used for all prospective clients who would like to purchase an item from you. 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 **Installation Prospect** pipeline is used for all prospective clients who would like your expertise to design and implement a technical solution for their businesses. The pipeline can help you track the communication between you and the client, work out the details of the installation, until the client confirms the business.

3. The **Onsite Service Prospect** pipeline is used for all prospective clients who need an onsite repair. The stages of this pipeline can help you track a customers repair problems, provide quotes for the repairs and necessary follow-up to win the business.

4. The **Training Prospect** pipeline is used for all prospective students who would like to enroll in a training class to gain more skills. This pipeline can help you track the students who have expressed an interest in joining the classes.

You can set up new custom pipelines to help you to track different types of business opportunities.

Projects

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

1. The **New Orders** pipeline is useful for tracking all your sales orders, notifying customers and delivering the orders.

2. The **Installation Services** pipeline is for customers who require your professional expertise for designing, installing, or configuring a new system

for their business. The stages of this pipeline allow you to plan and delegate tasks to complete the installation.

3. The **Onsite Services** pipeline is for keeping track of onsite repair services required by customers. The stages of the pipeline are used to schedule an onsite visit with the client, book the appropriate staff to perform the repair and follow-up if required.

4. The **Repair Services** pipeline is to keep track of all the in-store repair items. The stages of this pipeline show at what phase the repair is in and if new parts need to be ordered to repair the item.

5. The **Training Services** pipeline is for keeping track of hiring instructors, registering students and preparing course materials.

6. The **Defective Inventory** pipeline is to track items that are sent back to the manufacturer or distributor for replacement for credit.

If you offer other types of services or perform different sales processes, you can completely customize how you manage your projects by setting up custom pipelines.

Contacts

Contacts are the people you do business with. In this template, there are categories such as such as *Customer*, *Distributor*, *Vendor* to define the contact's connection to your business. Moreover, there are keywords such as *Good Customer*, *Tough Customer, Service Customer* to further describe your contacts in this database.

Contacts are linked together by relationships. You can specify relationships such as *is a client of*, *is a colleague 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 contacts. For example, a client should have the category *client* and the keyword *good customer* or *tough customer* tagged to its profile.

5. Link contacts together with a relationship. A shortcut to do this is to simply drag and drop one contact onto another to create the link. Select the correct relationship description for the two contacts to establish the relationship.

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 *Installation*, *Onsite*, *Repair* 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 *Installation*, *Internal Business*, *Training Classes* 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 one activity set:

1. The **Training Classes** activity set is used to create appointments to schedule all the classes of a particular course in your calendar. For example, if a course has five sessions that run once a week, you can specify the time in the appointment and set each respective class as 0 days, 7 days, 14 days, 21 days and 28 days after the start date.

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 print and design 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.

1. The *Mailing List* group is used to track the customers who would like to receive your newsletters and promotions. Using groups is a good choice for this circumstance because you can add both organizations and contacts to the mailing list, while Smart lists can only contain either contacts or organizations, but not both.

Reports

This database template has four customized reports:

1. The **Executive Summary Sheet** report displays all projects that are due in six months. The report is sorted by the employees 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.

3. The **Opened Opportunities** report displays all opportunities with an open status, sorted by their create date in reverse chronological order.

4. The **Class Details** report displays all the classes in session with the instructors names and students names.

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 forms:

1. The **Defective Product** form can be used to track all the defective items you have sent back to the distributor or vendor for an exchange or credit. This form allows you to enter information to track those particular items.

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 and checkboxes. You can also print or email forms to display the information to another party.

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.