# Daylite Touch User Guide

(Feb 23, 2011)

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# Objective

The purpose of this document is to help you with getting started and using Daylite Touch.

# Audience

This document is aimed at individuals who are new to Daylite Touch and are familiar with Daylite. You will learn how to set up the various pre-requisites and start working with Daylite Touch on a day-to-day basis.

# Requirements

## Device requirements

- **Devices supported:** We support all iPod Touch and iPhone models excluding first generation devices. All iPad models are supported.
- Minimum operating system is iOS 4.2 or later.
- **Minimum space requirement**: The application size is 10 MB. Your database size can range between 10 to 100 MB.

## System requirements

- Daylite 3.9 or later.
- Daylite Server Admin.
- We strongly recommend Mac OS X 10.5 Leopard (or higher versions) as your server. **Note:** Laptops are not recommended as the server due to changing networks. For more information, click here.

# Connecting for the first time

You can connect to a sample database or your main Daylite database.

## 1. Using the Sample database

If you're using a sample database, keep in mind that any live business data you enter here will not be kept after the trial period. You cannot convert a sample database into your live database.

## 2. Connecting to the Daylite database

You should do the initial setup with your iPhone/iPod Touch in your office, on your LAN and not remotely.

**Tip:** During the initial setup, we recommend connecting to your database locally due to good speed and bandwidth availability. The initial sync may take some time for large databases. Subsequent syncs are much faster and less data intensive.

When the server computer name comes up, select it and enter your Daylite user name and password. This whole process will take a few minutes. While the server is creating the environment, you can interrupt or quit Daylite Touch. The next time you launch Daylite Touch, the set up process continues from where it was interrupted.

When the server has finished creating your Touch database, it will start sending it over to your device. You can interrupt the sending or pulling process and it will be resumed when you come back the next time. For example, if you get a phone call that you wish to attend to, you can do that. So, this whole process is interruptible. Once your database has been completely pulled, it will take you to the **Home** screen.

**Note:** The above assumes that you've setup your Daylite Server and Touch Server as per the Daylite Server Guide. It also assumes that the device is on the LAN when connecting to the server. If you're in a different location you would choose **'Other'** from the server list and enter the connection details as per the instructions from your administrator.

# Synchronization

You can use Daylite Touch anywhere. You don't have to be connected to the internet **to use** Daylite Touch. However, you should be connected periodically, so that Daylite Touch can synchronize back to the server. Your server has to be configured appropriately as well.

Daylite Touch can synchronize in 3 different ways:

1. You can synchronize your device with the server manually. Go to the **Home** screen and tap the **Sync** button at the top-left corner of the screen. Upon doing this, Daylite Touch will begin synchronizing if it can connect to the server.

   *The Sync button*

   If Daylite Touch could not connect to the server, it will display a warning that it couldn't synchronize.

   *Warning*

   You can also find out when the last synchronization occurred by tapping **Settings** in your **Home** screen. The date and time when you last synchronized will show up here.
2. Daylite Touch synchronizes every 20 minutes when it is running. But, if Daylite Touch is off, syncing will not happen. When you start up, if it has been more than 20 minutes since the last time you synchronized, then Daylite Touch will synchronize again. If you are working in Daylite Touch for more than 20 minutes, then while you're in there, it will synchronize again. All of this will happen automatically in the background although sometimes the application can become blocked momentarily when syncing large amounts of changes.
3. Once you've completed making a meeting or delegating a task, Daylite Touch will synchronize with the server. If Daylite Touch cannot synchronize, then the changes will be kept on your device until it can synchronize the next time.

When Daylite Touch is syncing, you'll see a progress bezel having the option to cancel the sync at any time.

## Remote syncing

If you're syncing Daylite Touch to the server for the first time over a local Wi-Fi network, then as long as you have enabled internet access and entered a static IP or DynDNS name, Daylite Touch should automatically log and remember the internet access details. When you are working remotely and sync Daylite Touch over the internet, there should be no need to change the connection details.

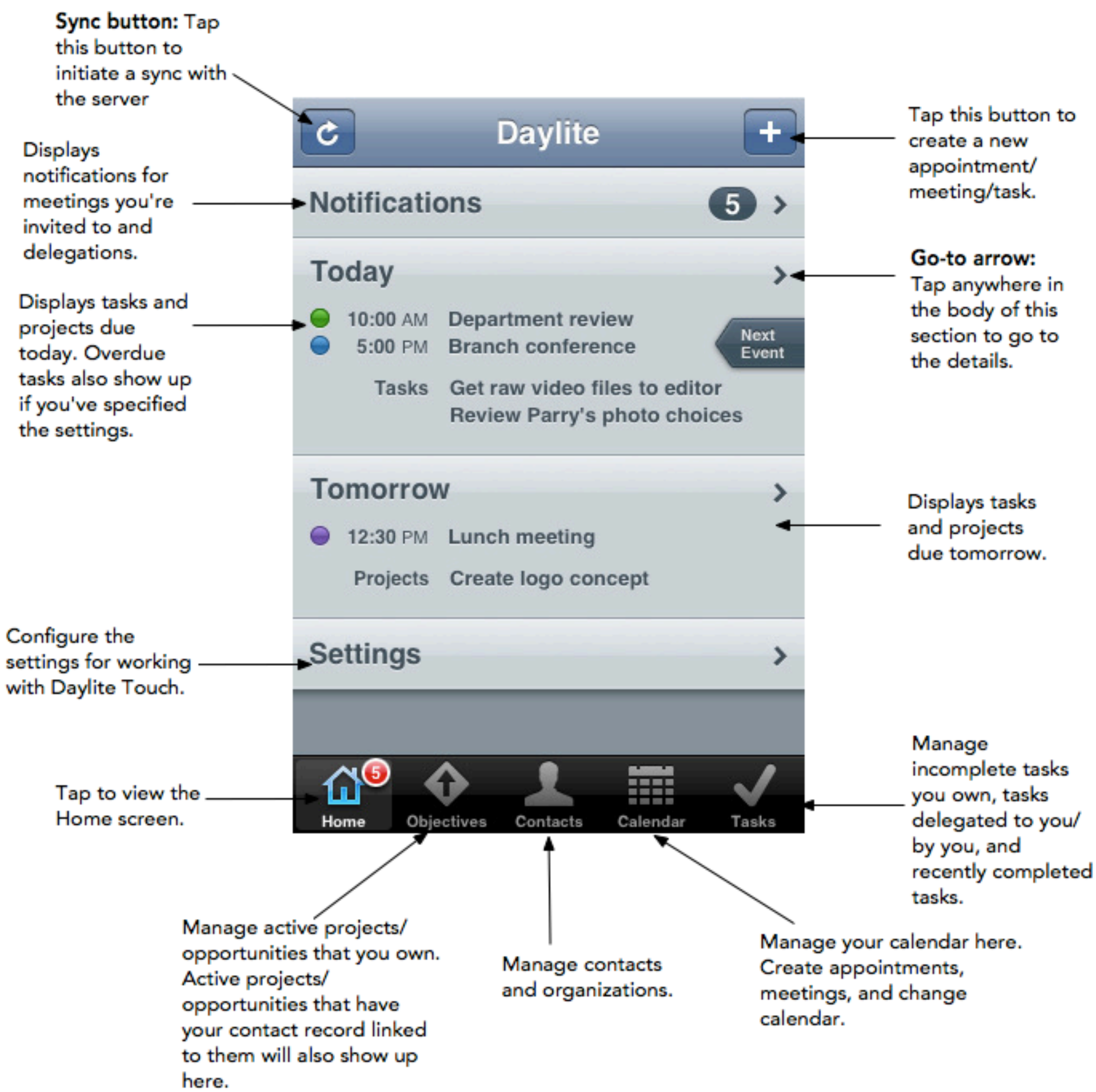
In cases where the user is permanently remote or working remotely at the time of the first sync, the user would need to enter the static IP or DynDNS name into Daylite Touch in order to sync with the server. When Daylite Touch is synced remotely for the first time and the user returns from the remote location to find themselves on the same local Wi-Fi network as the server, they may be required to enter the local Wi-Fi connection details into Daylite Touch, except in cases where there is an internal DNS which resolves Internet domain names to internal computers. It's therefore to the users' benefit to sync on the local Wi-Fi network for the first time.

## Rules for syncing

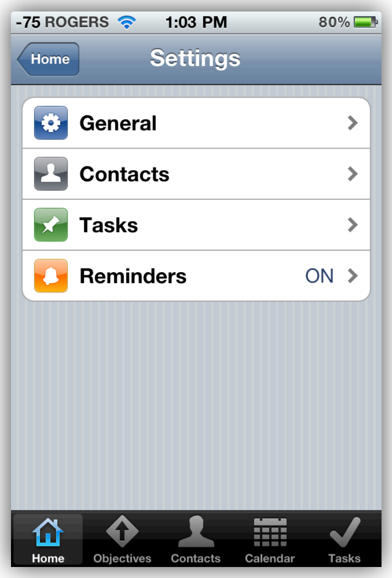
This section helps you to understand what items from Daylite will be synchronized to your device. **Note:** As a Daylite Touch user, your Daylite desktop application will have a sync list called “Daylite Touch” in the Contacts and Organizations view. All contacts and organizations in your Daylite Touch list will be synchronized with your device.

| Daylite Object | What comes over to your device |
|---|---|
| Tasks | Tasks that you own that are not completed will come over. Tasks delegated to you/by you will also be synchronized. Tasks that are completed 30 days ago or older are removed. Note: All tasks linked to open projects and opportunities will come over. The last 10 tasks of a contact are brought over for retaining the contact history. |
| Appointments | Once you've set up Daylite Touch on your device, the app syncs all appointments created up to 60 days prior to the database creation date and all future appointments. Repeating appointments will be synchronized even if the initial appointment in the repeating set was created prior to 60 days, if and only if, the last repeat was sometime within the past 60 days, or, sometime in future. |
| Projects | Active projects (i.e., projects with status “New” or “In Progress”) that you own will come over. Active projects that have your contact record linked to them will also be synchronized. |
| Opportunities | Active opportunities (i.e., opportunities that have their state set as ”Open”) that you own will come over. Active opportunities that have your contact record linked to them will also be synchronized. |
| Notes | All notes linked to projects and opportunities that are on your device will be synchronized. For contacts/organizations on your device, at-least the last 10 notes added in Daylite will be synchronized. |
| Contacts | All contacts you have dragged into your **Daylite Touch** list will be synchronized. Contacts linked to projects, opportunities, tasks, and appointments that will be brought into your device will be synchronized. |
| Organizations | All organizations in your Daylite Touch list will be synchronized. Organizations linked to contacts, projects, opportunities, tasks, and appointments that will be brought into your device will be synchronized. |

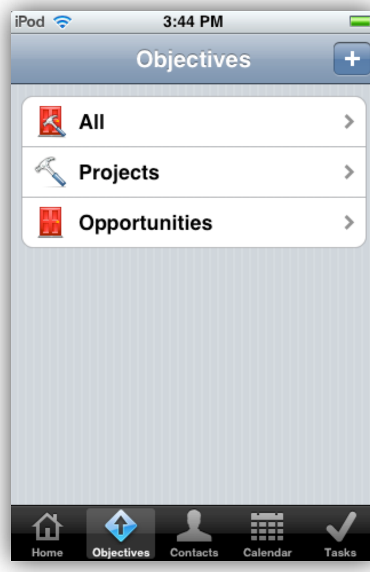
# Basics



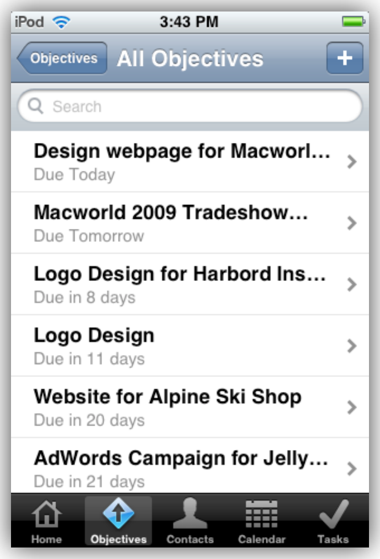

*The Home screen*



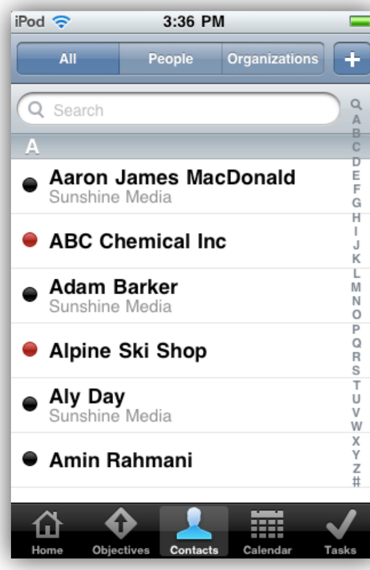

*The Settings pane*



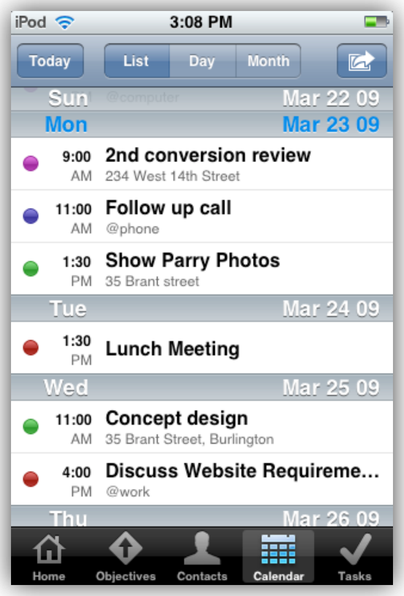

*The Objectives area*



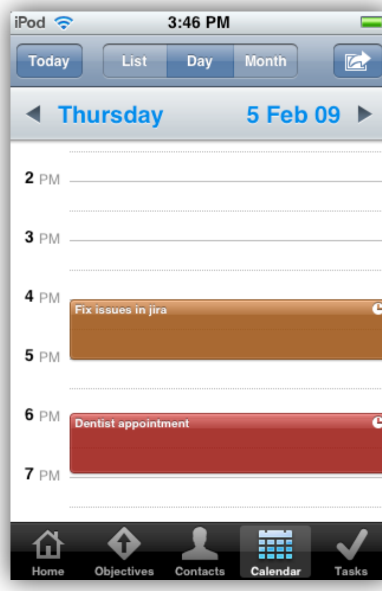

*List of projects and opportunities*




*List of contacts and organizations*

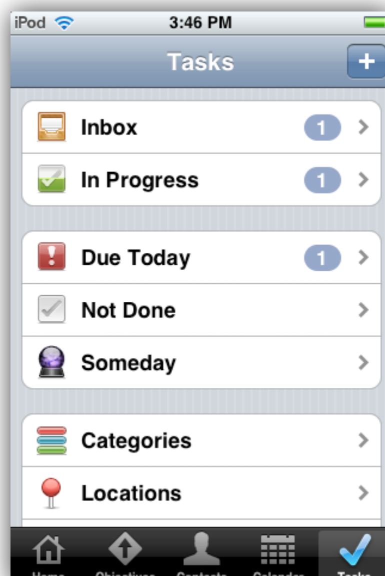



Calendar: List view




Calendar: Day view


Calendar: Month view




The Tasks area

# Touch Settings

To configure the preference settings for using Daylite Touch, go to the **Home** screen and tap **Settings**.

1. **General:**

   This pane has the following information.

   - **About:** You can view the version of Daylite Touch you are using and the date and time when the last sync was performed.
   - You can view the hostname of the computer you're trying to sync with and your username. If you wish, you can edit the hostname, the username or the password. If you change the hostname or the username, you'll have to download a new copy of your data and any changes stored on your device will be lost. If you change any of these settings on the server, then ensure that you enter the updated login information to connect to the Daylite Touch Server.
   - **Shake to Sync:** Turning this "On" will initiate a synchronization of your device with the server when you shake your iPhone/iPod Touch.
   - **Sync on Launch:** Turning this "On" will synchronize your device with the server every time you launch Daylite Touch.
   - **Wipe Touch Database:** This wipes your local database. If you don't reconnect to the server, then you'll go back to using the sample database.

2. **Contacts:**

   This pane has the following preferences.

   - **Sort Order:** You can choose how you want to sort the contact names.
   - **Display Order:** You can choose how you want to display the contact names.
   - **Show in Calendar:** You can choose if you want to view birthdays and anniversaries in your Calendar.
   - **Use Sync List:** By turning this "On," you can control additional contacts that come over to your device. This requires a re-sync or a re-download.

3. **Tasks:**

   - **Overdue Tasks:** You can turn **Show in Today** "On" to display your overdue tasks in **Today** of your **Home** screen.

4. **Reminders:**

   - **Reminders:** You can control whether reminders from Daylite should fire for this device.
   - **Alerts:** Turning this "On" only displays an alert for the reminder.
   - **Sounds:** Turning this "On" only produces a sound for the reminder.

# Starting your day

Launch Daylite Touch and go to the **Home** screen to review everything that should be done for today. You can scan through appointments, meetings, and tasks you need to do or are overdue and take the appropriate action. Accept/reject any meeting invitations and delegations by tapping **Notifications**.

# Planning your day

It is recommended that you do all your planning while working from your desktop application. However, Daylite Touch has the facilities to do your planning when you're on the road.

1. For doing your planning, go to the **Home** screen and take a mental note of what needs to be done today and tomorrow.
2. Go to the **Objectives** area and tap **Projects** and/or **Opportunities**. Determine if anything needs to be done next.
3. View your calendar by day or week view and plan around the commitments you've made.
4. Go to the **Tasks** area. Tap **Inbox** and **Not Done**. Go through the tasks in your inbox and work through them by either delegating them or doing them if they take less than 2 minutes or maybe classifying them for reviewing later.
5. Take a look at your someday tasks by tapping **Someday** to see if it makes sense to do some of those tasks now.

Visiting your **Home** screen, the **Tasks** area, your **Inbox** and **Someday** lists, and the **Objectives** area gives you the full scope of what needs to be done and helps you to prioritize your day.

**Note:** The planning tips are suggestions, you may develop your own methodology or use another.

# Managing your Calendar

Daylite Touch calendar has a **List**, **Day**, and **Month** view similar to iCal. If you flip your device sideways from the **Calendar** view or the **Home** screen, you will see a **Week** view.


*The List, Day, and Month view selector*

**Note:** Daylite Touch comes with the reminder alarms feature for devices running iPhone OS 4.0 or later only. Please see "Working with reminders" section on page 22 for more information.

## Creating new appointments

1. Working from Daylite Touch, tap **Calendar**.
2. Tap the **Action** button at the top-right corner of your device.
3. Select **New Appointment**.
4. Enter the details of your appointment.
5. When you have set up the appointment, tap **Save.**
   Daylite sends the appropriate notifications and blocks your time.

**OR**

1. Go to the **Home** screen.
2. Tap the "+" button at the top-right corner of your device.
3. Select **New Appointment**.
4. Enter the details of your appointment.
5. When you have set up the appointment, tap **Save.**
   Daylite sends the appropriate notifications and blocks your time.

Whether you're looking at your day or week, you can quickly schedule an appointment using Multi-Touch. Simply hold one finger on the screen and drag the other one from start time to end time. You can enter additional details for the appointment.  You can use multi-touch in week view also to create an appointment.

## Creating new meetings

1. Working from the **Calendar** area**,** tap the **Action button** at the top-right corner of your device.
2. Select **New Meeting**.
3. Select the users for whom you wish to create a meeting. You can select multiple users by tapping the name of the different users. Daylite Touch displays a check mark next to the name of the user who will be linked to the meeting.
4. If you wish to include resources, scroll down to the bottom of your screen and pick the resources.
5. When you are ready to schedule the meeting, tap **Schedule**.

   This takes you to the month view along with the day view and the busy areas.
6. You can set the appointment time using multi-touch. Once you've selected a time and created the appointment, tap **Details** and enter additional information.
7. Tap **Save**.

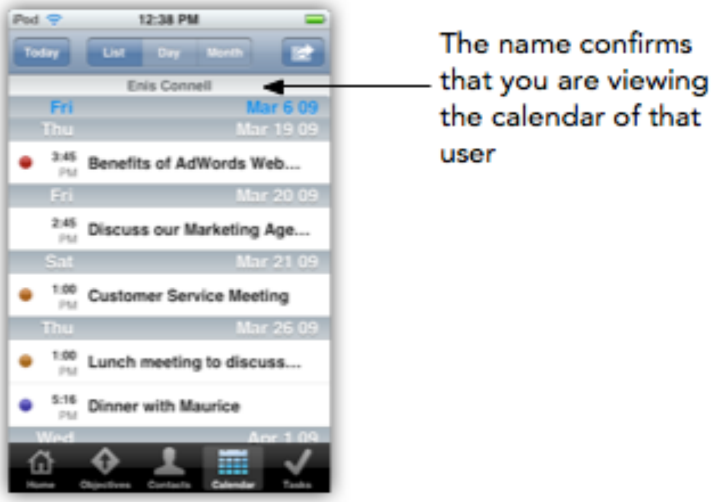
   Daylite sends the appropriate notifications to all users linked to the meeting and blocks time. When a meeting invitation is sent, all users linked to the meeting will see the "Accept" and "Reject" notifications. They can select what they want to do.

**Note:** Birthdays and anniversaries show up in the List/Day/Month view of the Calendar. You can turn this preference setting On/Off. Go to the **Settings** pane, tap **Contacts**, and under "Birthdays and Anniversaries" you can turn the "**Show in Calendar**" button On/Off.

## Changing the calendar

If you're using Daylite in a multi-user environment, Daylite Touch can view another user's calendar.

1. Working from the **Calendar** area, tap the **Action button** at the top-right corner of your device.
2. Select **Change Calendar**.
3. Tap the user whose calendar you wish to see.
   A bar having the name of the user you have selected confirms that you are viewing that person's calendar and not your calendar. When you go to the week, day, list, or month view, you'll be viewing that user's calendar.




*Calendar of a different user*

# Managing your Tasks

There are many key aspects of managing your tasks using Daylite Touch.

## I. Creating new tasks

There are multiple ways for creating new tasks.

**Creating tasks from the Home screen**

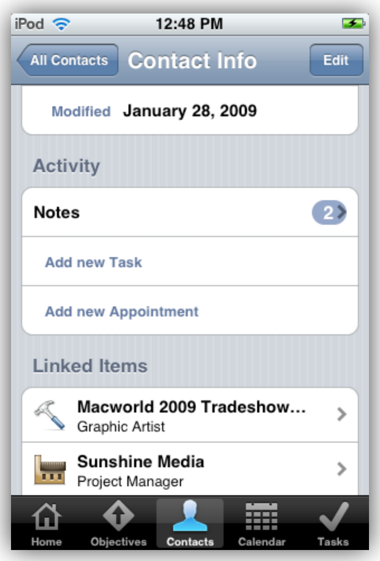
1. Working from the **Home** screen, tap the "+" button at the top-right corner of your screen.
2. Select **New Task**.
3. Enter the details.
4. When you are done, tap **Save**.

**Creating tasks from the Tasks area in the tab bar**

1. Working from the **Tasks** area, tap the "+" button at the top-right corner of your screen.
2. Enter the details.
3. When you are done, tap **Save**.

**Creating tasks from contacts, organizations, projects, and opportunities**

While viewing a contact/organization/project/opportunity, go to the tasks area and create a new task. For example, in the Activity area of a contact, you can create a new task by tapping **Add new Task**.



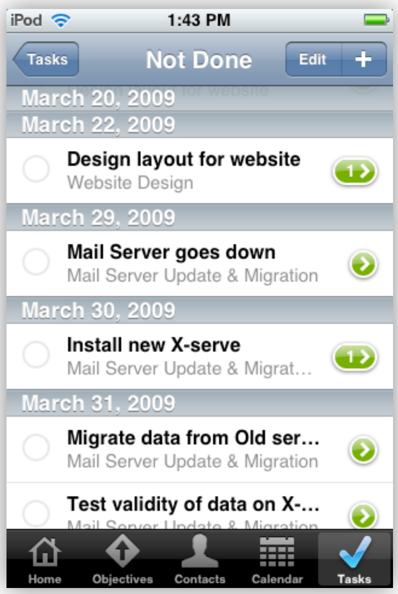

*Creating a task*

4. Enter the details.
5. Tap **Save**.
   The task you create will be linked to the contact/organization/project/opportunity.

When you create a new task, you can just enter the name and tap **Save.** When you review and process tasks, you can enter the other details.

### Creating sub-tasks

1. Tap the disclosure button at the right-end of the main task.
2. Tap the "+" button at the top-right corner of the screen.
3. Enter the details of the sub-task.
4. When done, tap **Save**.
   The disclosure button of the main task displays a number matching the number of sub-tasks linked to the main task.



*Tasks with sub-tasks*

## II. Viewing your tasks

Using Daylite Touch, you can view your tasks in the following places in your device.

### 1. Home screen

The **Home** screen shows what tasks are due today and tomorrow. You can choose to show overdue tasks that you haven't done by specifying the appropriate settings. To do this, in the Home screen, tap **Settings**. In the Overdue Tasks area, turn "Show in Today" on. By doing this, your overdue tasks will show up under Today in the **Home** screen and in the Due Today list in tasks.

**2. Tasks area**
The **Tasks** area in the tab bar is another place where you can view tasks. This area has the following basic lists and tasks meeting certain criteria will show up in the appropriate lists.

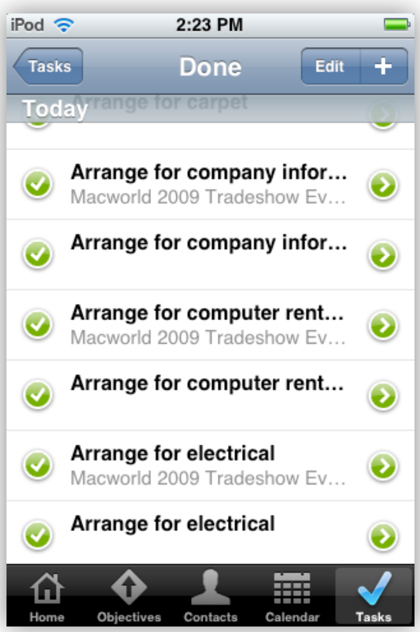
- Inbox
- In Progress. This list is dynamic and shows up only if you've added tasks with status "In Progress."
- Due Today
- Not Done
- Someday
- Categories
- Locations
- Delegated
- Done

Tasks added to the lists take on those characteristics.

## III. Working with tasks

### A. Completing tasks

For tasks that you completed, you can mark them as done by changing the status of the task to **Done**. When you mark a task as Done, you will see a white check mark in a green, circular background to confirm that the task is completed. The Done list shows all tasks that have been done in the last 30 days.




*Tasks marked as Done*

## B. Deleting tasks

If it suits your workflow, you could delete a task that you have finished working with.

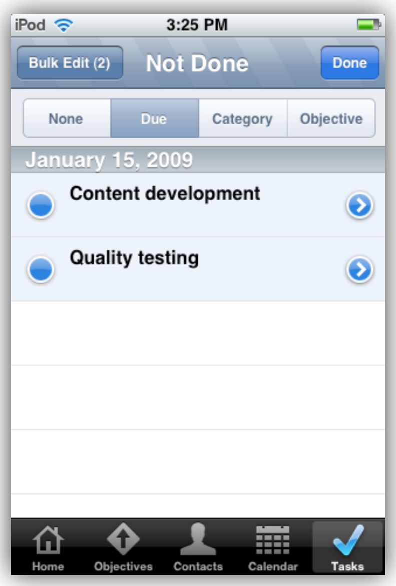
### To delete a task

1. Select a task.
2. Tap **Edit**.
3. In the edit mode, scroll to the bottom and tap **Delete Task**.
4. Tap **Delete Task**.

Touch supports gestures for deleting tasks. (Hold and drag across the name of the task from left to right and a **Delete** button appears. Tap **Delete**.)

## C. Bulk editing tasks

1. Working from the task list/sub-tasks/tasks for a project, tap the Edit button at the top-right corner of the screen.
2. Select the tasks you wish to bulk edit. For example, if you select 2 tasks to bulk edit, the button changes to "Bulk Edit (2)." Depending on the number of tasks you select for bulk editing, the **Bulk Edit** button changes accordingly.




*Tasks you've selected for bulk-editing*

3. Tap **Bulk Edit** at the top-left corner of the screen.
4. Enter the details.
5. When done, tap **Save**.

## D. Delegating tasks

In a multi user environment, you can delegate tasks to another user. You will be notified when there are changes or updates concerning the delegated task.

### To delegate tasks

1. Working from the **Tasks** area, tap the + button at the top-right corner of the screen.
2. Enter the appropriate details.
3. Tap **Delegate to User**.
4. Select a user whom you wish to delegate the task.
5. Tap **Save**.

Working from the **Tasks** area, tap **Delegated** to see all tasks you have delegated.

## E. Someday tasks

If ideas come to mind but you don't have time to do them in the near future, you can enter them in as **Someday** tasks so that they are not forgotten. These will remain in your **Someday** list which you can periodically review.

# Working with reminders

If you're using the latest version of Daylite Touch on a device running iPhone OS 4.0 or later, then you can take advantage of reminder alarms for appointments and tasks.

## How do reminders work?

If you've set up default reminders for tasks and appointments in Daylite, then you can apply them to new tasks and appointments created on Daylite Touch. Working from the **Daylite** application, choose Daylite > Preferences, click Notifications, and select the checkbox "Apply my default reminders to new tasks and appointments created on Daylite Touch." By doing this, any new task/appointment created using Daylite Touch will have a default reminder added to them in Daylite Touch and Daylite on the desktop when they sync over.

For users with an older version of iPhone OS, the default reminder is only available in **Daylite** application and not Daylite Touch.

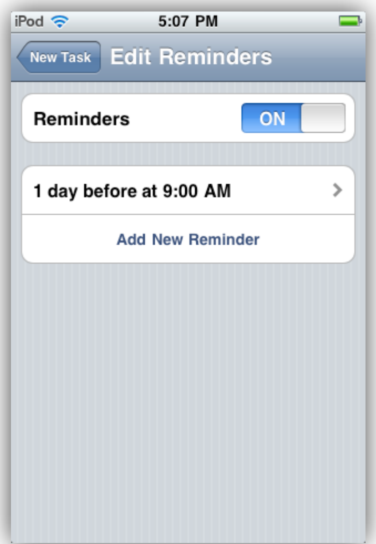
You can turn reminders On/Off for your device by going to **Settings** and selecting **Reminders**. When reminders are turned On, they work as explained below:

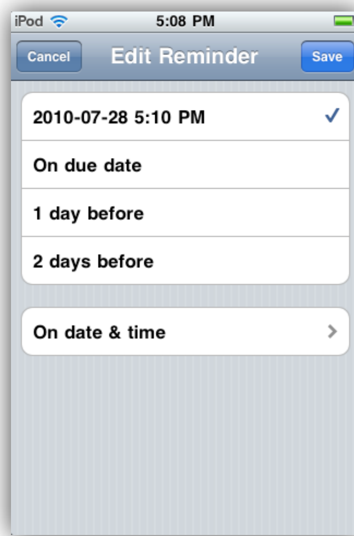
- Reminders will fire an alert on the device, regardless of whether or not Daylite Touch is running. If you create or edit a reminder on the desktop, it *must* be synced to the device before it can be scheduled to fire on the device.
- Reminders can now be viewed in the Notifications pane after having fired, and can be either dismissed and/or snoozed.
- Reminders can now be created/edited/deleted on the device though options for setting reminders are more limited than on the desktop.
- Reminders from the desktop of type "Email," "Run Script," "Open File," and "Speak Text" will not be shown, nor will they fire on the device.

The reminder options for tasks are slightly different from those of appointments. This is because tasks only have a due date, but no associated time. Whereas, for appointments, there is a specific time that has been set and the reminder options can be presented relative to the appointment start time—for example, 15 minutes before the start time, etc.

## Setting reminders for tasks

1. Create a new task.
2. Enter the appropriate information.
3. In Reminders, you'll see your default reminder. If you wish, you can edit the default reminder by tapping on Add New Reminder.



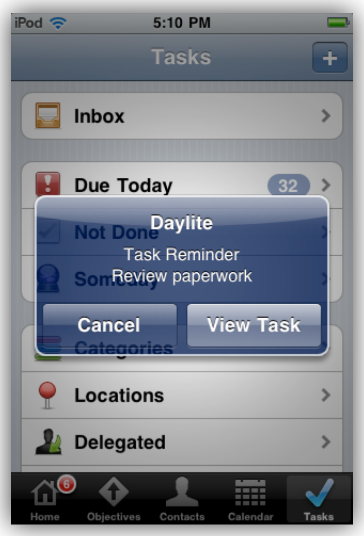



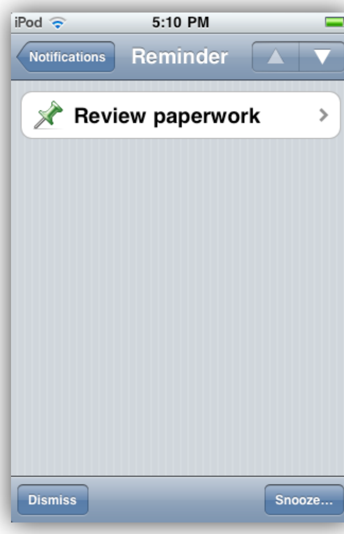

*Editing a reminder*

*The reminder has been set to 5.10 pm on July 28*

4. Save the settings.

A reminder will fire on your device at the chosen date and time. You have options to either snooze or dismiss the reminder.



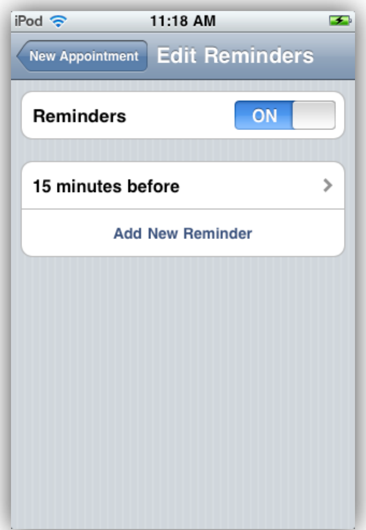




*Reminder alert on your device*

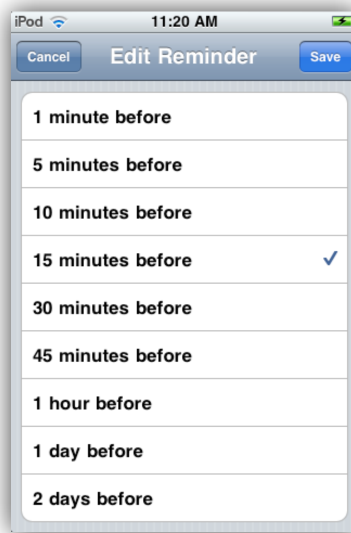
*Options to Dismiss or Snooze the reminder*

## Setting reminders for appointments

1. Create a new appointment.
2. Enter the appropriate information.
3. In Reminders, you'll see your default reminder. If you wish, you can edit the default reminder by tapping on Add New Reminder.



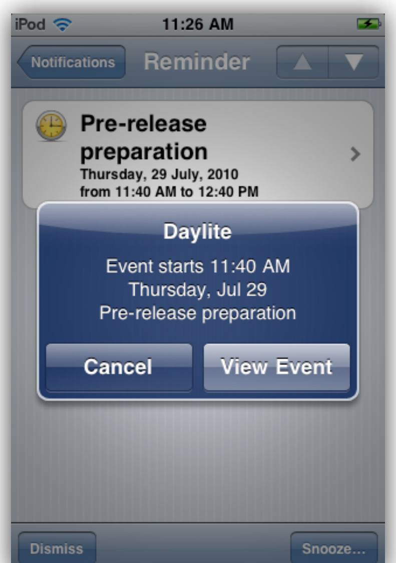

Editing a reminder




Reminder options for appointments

4. Save the settings.

A reminder will fire on your device at the chosen date and time. You have options to either snooze or dismiss the reminder.




Reminder alert on your device


Options to Dismiss or Snooze the reminder

# Managing your Projects

Launch Daylite Touch, go to the **Objectives** area, and select **Projects**. This pane shows all open projects that you are either the owner of or play a role in. Only projects with the status "New" or "In Progress" are considered as open projects and they show up on your device.

Each project has certain data including the due date, category, start date, extra fields, etc. The **Activity** area shows the tasks, appointments, and notes that are linked to the project. The **Linked Items** area shows the people and companies that are linked to the project.


*The Activity and Linked Items area*

## Creating new projects

1. Working from the **Objectives** area, tap **Projects**.
2. To create a new project, tap the "+" button at the top-right corner of the screen.
3. Enter the details of the project.
4. When done, tap **Save.**

**Note:** When you make/edit a project, tap **Set Pipeline** to add a pipeline to the project. You can select a pipeline from the list and assign a stage.

## How to manage projects effectively?

As you review your projects, keep your task list to the minimum. Working from the **Activity** area of the project, you will see 3 types of task lists.

- **All Tasks**. This list shows all tasks linked to the project regardless of who the owner is. A task is displayed in grey color if you are not the owner.
- **My Tasks**. This list shows all tasks linked to the project that you own and are "not done."
- **Someday Tasks**. This list shows all tasks linked to the project that are marked as someday regardless of who the owner is. A task is displayed in grey color if you are not the owner.

**Note:** For single users, **All Tasks** and **My Tasks** will be the same.

The task list for a large project can get very long. We recommend putting the tasks that don't have a defined due date into the "Someday" list, so that your "All Tasks" list is not overwhelmingly long. You can review your Someday tasks periodically to see if due dates should be added to them.

**To add a note to a project**

1. Look up the project.
2. In the **Activity** area, tap **Notes**.
3. To add a new note, tap the "+" button at the top-right corner of the screen.
    - Enter a title for the note.
    - Set a category to specify what kind of note it is.
    - Specify what you wish to record as a note. Tap **Save**.
4. Tap **Done.**

**Tip:** When you have tasks on your mind that are linked to a project, we recommend that you go into the project and add the tasks directly from there.

**To add a task to a project**

1. Look up the project.
2. In the **Activity** area, tap **All Tasks** or **My Tasks**.
3. To add a new task, tap the "+" button at the top-right corner of the screen.
4. Enter the details for the task.
5. When done, tap **Save**.

For your convenience, Daylite Touch enables you to group and view projects based on due date, priority, and category. Projects with the closest due date appear at the top of the list. When viewed based on priority, projects with the highest priority show up at the top of the list. When viewed based on category, the different categories are grouped in alphabetical order and the projects are arranged in their respective categories.

**To delete a project**

1. Select the project.
2. Tap the **Edit** button at the top right corner of the screen.
3. Scroll to the bottom and select **Delete Project**.
4. Tap **Delete Project**.

# Managing your Opportunities

You can create opportunities using Daylite Touch; however, you should add line items for products/services on your desktop computer. For example, while you're on the road, you can create a new opportunity and enter some details. When you are back in the office or at home in front of your computer, you can add products/services, set up estimates, and do the remaining things.

## Creating new opportunities

1. Working from Daylite Touch, tap **Objectives**.
2. Tap **Opportunities**.
3. To create a new opportunity, tap the "+" button at the top-right corner of the screen.
4. Enter the details of the opportunity.
5. When done, tap **Save.**

When you make/edit an opportunity, tap **Set Pipeline** to add a pipeline to the opportunity. You can select a pipeline from the list and assign a stage. You can also add tasks and appointments to the opportunity in the same way as projects.

## Deleting opportunities

1. Select the opportunity.
2. Tap the **Edit** button at the top right corner of the screen.
3. Scroll to the bottom and select **Delete Opportunity**.
4. Tap **Delete Opportunity**.

For your convenience, Daylite Touch enables you to group and view opportunities based on due date, priority, value, and category. Opportunities with the closest due date appear at the top of the list. When viewed based on priority, opportunities with the highest priority show up at the top of the list.

If you've set up products/services for opportunities on your desktop, then the "Total" from your estimate is displayed as "Value" of the opportunity on your device. When viewed based on value, opportunities having the highest value show up at the top of the list. When viewed based on category, the different categories are grouped in alphabetical order and the opportunities are arranged in their respective categories.

# Managing Contacts/Organizations

The Contacts view of Daylite Touch displays contacts and/or organizations in alphabetical order based on which one of the "All," "People," or "Organizations" filter is selected. When viewing contacts, you can scroll down to the bottom of the list and you'll see a button called "Load more contacts." Select this button to display additional contacts.

The following are the major considerations for deciding what contacts/organizations in your Daylite database will be available on your device using Daylite Touch.

- If a contact is linked to one of the activities (task, appointment, project, or opportunity) on your device, then that contact will be available on your device.
- All contact records associated to users in your database will be made available on your device using Daylite Touch. This makes it convenient, for example, when you have to schedule a meeting between users.
- "Daylite Touch" is a special list in your database for contacts and organizations only. All contacts and organizations in the Daylite Touch list will be synchronized with your device.

Using the search field, you can locate specific contacts and organizations in the database. Daylite Touch looks for information in the following fields when searching:

- **Contacts** - First name, Last name, Default organization name, Default address city
- **Organizations** - Name, Default address city

## Adding new contacts

1. Working from Daylite Touch, tap **Contacts.**
2. To add a new contact, tap the "+" button at the top-right corner of the screen.
3. Select **New Contact.**
4. Enter the details for the contact. Keep in mind the following:
    - To link an organization, tap **Add Organization**. You can select an organization from the list or create a new one by tapping the "+" button at the top right corner.
    - Specify a role, title, and department.
5. Tap **Save**.
   The contact is created and the organization is linked to the contact.

## Adding new organizations

1. Working from Daylite Touch, tap **Contacts.**
2. To add a new organization, tap the "+" button at the top-right corner of the screen.
3. Select **New Organization.**
4. Enter the details for the organization. Keep in mind the following:
    - To link a contact, tap **Add New Link**. You can select whether you wish to link a contact, project, or opportunity. In the list of items that shows up, you can select an item for linking or create a new one by tapping the "+" button at the top-right corner.
    - Specify a role, title, and department.
5. Tap **Save.**

   The organization is created and the contact is linked to it.

## Importing contacts and organizations

Using Daylite Touch, you can import contacts and organizations from Contacts and ScanBizCards apps. The Contacts app comes with all iOS devices by default. ScanBizCards is available from the iOS App store as a separate download.

1. Working from Daylite Touch, tap **Contacts**.
2. Tap the "+" button at the top-right corner of the screen.
3. Do the following:
    - To import from Contacts app, select **Import iOS Contact**. This opens the Contacts app where you can select and add the desired records.
    - To import from ScanBizCards, select **Import From ScanBizCards**, proceed to scan and add the items. **Note:** Import From ScanBizCards option is available only when you have either ScanBizCards or ScanBizCards Lite installed. For more information, click here.

## Deleting contacts

If you have the permission to delete contacts, you can do so. Contacts associated with users cannot be deleted. Also, you cannot delete contacts that are linked to users. Deleted items will go into the Trash in Daylite.

1. Select the contact.
2. Tap the **Edit** button at the top right corner of the screen.
3. Scroll to the bottom and select **Delete Contact**.
4. Tap **Delete Contact**.

## Deleting organizations

1. Select the organization.
2. Tap the **Edit** button at the top right corner of the screen.
3. Scroll to the bottom and select **Delete Organization**.
4. Tap **Delete Organization**.

**Note:**
**Quick tip for iPhone users only:** Working from a contact/organization record on your iPhone, you can tap a phone number to make a call. Starting with Daylite Touch 1.1 or later, if you make an outgoing call for a phone number in Daylite Touch,  you can do the following upon completing the call.

- Record time by creating a task or appointment.
- Create a new follow-up task or appointment.

Daylite Touch also enables you to send a text message to the contact/organization. Working from the contact/organization record, simply scroll to the bottom and tap "Text Message."

**Daylite Touch disclaimer when re-downloading the database**

There may be a time when a user wishes to synchronize all contacts and organizations from their Daylite database into Daylite Touch. In order to activate this, a user can set the 'Use Sync List' option in Daylite Touch to 'OFF.'

To accommodate this feature, the Daylite Touch database will be need to wiped and re-downloaded. For those users that depend on calendar history in Daylite Touch, you need to be aware that when the database is re-downloaded, the syncing rule for calendars will be re-applied. (*You can refer to page 8 of the Daylite Touch user guide for more information on this).*

As a result of this change, you may lose some of your calendar's history that was previously in Daylite Touch synced to your device since Daylite Touch only synchronizes appointments created up to 60 days prior to the database creation date and all future appointments *(Special conditions apply for repeating appointments, which you can read about in the DLT user guide).*

If you depend on the history for the calendars in Daylite Touch, then you may not want to set the 'Use Sync List' option to 'OFF.' As an alternative, you can drag the contacts you need synced to Daylite Touch, into the 'Daylite Touch' sync list in the Daylite application.

Please note, it some cases it may be absolutely necessary to re-download the database due to a problem with the database file. Cases like this may be unavoidable. Once the database is re-downloaded, there is no way to re-sync the calendar history beyond the syncing rules that are applied.

# Managing Notes

Notes are brief records of information. You can add short notes to contacts, organizations, projects, and/or opportunities on your device and set a category. Keep in mind that only plain text notes can be edited on the device. Notes having rich text content and emails cannot be edited on the device.

**Important:** Daylite Touch has TextExpander integration built-in that will help you to type faster. You must have TextExpander Touch installed on your device to take advantage of this integration. For more information, click here.

## Adding notes linked to contacts/organizations

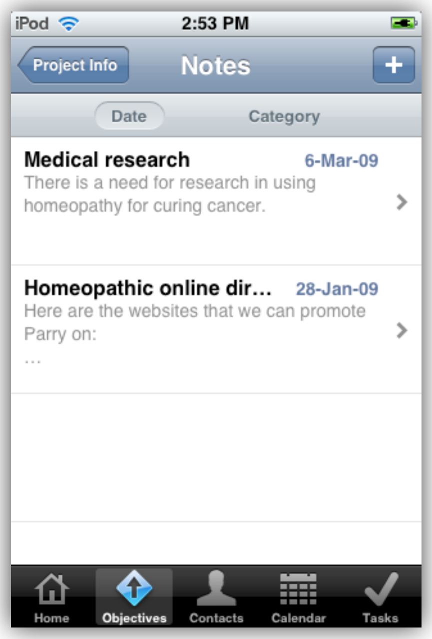
1. Working from Daylite Touch, tap **Contacts**.
2. Select a contact/organization from the list.
3. In the Activity area, if there are pre-existing notes, you'll see how many notes are linked to the contact/organization. Tap **Notes**. Tap the "+" button at the top-right corner of the screen to create a new note. Otherwise, if there are no pre-existing notes, then tap **Add new Note**.
    - Enter a title for the note.
    - Set a category for the note.
    - Enter the note. Tap **Save.**
4. Tap **Done.**

## Adding notes linked to projects/opportunities

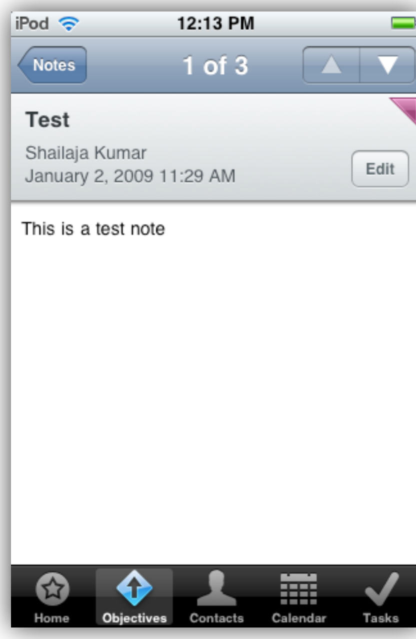
1. Working from Daylite Touch, tap **Objectives**.
2. Tap **Projects** or **Opportunities**.
3. Select a project/opportunity from the list.
4. In the Activity area, if there are pre-existing notes, you'll see how many notes are linked to the project/opportunity. Tap **Notes**. Tap the "+" button at the top-right corner of the screen to create a new note. Otherwise, if there are no pre-existing notes, then tap **Add new Note**.
    - Enter a title for the note.
    - Set a category for the note.
    - Enter the note. Tap **Save.**
5. Tap **Done.**

## Viewing notes

Notes can be grouped by date or category and viewed accordingly. For a note existing in Daylite Touch, any modification to that note in Daylite brings it to the top of the list (when grouped by date), or, top of the category (when grouped by category) in Daylite Touch. Once you select a note in a group, you can use the up and down arrows to get to any other note in the list.




*Grouping notes by date and category*




*Arrows to scroll through the notes list*

**Note:** When viewing notes, data detectors allow you to click web addresses, email addresses, or phone numbers in the text.

## Deleting notes

1. Select the contact/organization/project/opportunity.
2. In the Activity area, tap **Notes**.
3. Select a note to view.
4. Tap **Edit**.
5. Tap **Delete**.
6. Tap **Delete Note**.

# What preference settings from Daylite are displayed in Touch?

| Preferences | Moved to Touch |
|---|---|
| General | No |
| Auto Dialer | No |
| Hot Keys | No |
| Contextual Menus | No |
| Classifications | Yes |
| Roles & Relationships | Roles: Yes<br>Relationships: No |
| Forms & Fields | Forms: No<br>Extra Fields: Yes |
| Organizations | Yes |
| Opportunity | Opportunity Types: Yes<br>State Reasons: No |
| Notifications | No |
| Letter Templates | No |
| Activity Sets | No |
| Pipelines | Yes |
| Visibility | Yes. (You can set the visibility to either Public, or Private, or you can apply a Visibility Preset.) |
| Labels | Yes |
| Locations | Yes |
| Taxes | No |
| Identity | No |
| Resources | Yes |
| Default Values | Yes. (All default values come over to Touch except “Copy phones to new contacts” for organizations.) |

# Help and other resources

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

- We have certified partners who can provide product training and other specialized services. For more information, click here.
- For more information about Daylite Touch Server setup, click here.
- Apple Help offers step-by-step instructions and tips for making the most out of Daylite. While using Daylite, choose **Help > Daylite Help**.
- The support website and knowledge base has up-to-date articles and movies that can help you solve technical difficulties. Visit http://www.marketcircle.com/help/index.html.
- Visit our forums to share ideas, tips, and questions with other Daylite users. Marketcircle engineers, designers, and support staff also share their knowledge on the forums.

# Index

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