Daylite for photography professionals

This database template mirrors the database of a typical wedding and portrait photographer. It 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.

Overview

Photographers often have to accommodate an abundant amount of requests from their clients regarding styles, colors and overall appearance of the final product. This database emphasizes on forms to help you store these detailed information about specific clients requests. Moreover, photographers are always visiting different locations and venues for shooting assignments. Activity sets can help you track the progress of many required tasks and to schedule all appointments necessary to complete your projects.

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 linked to 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 and will contribute towards increasing your company's revenue. When you create an opportunity, you can associate one of the following pipelines to the opportunity.

1. The **Wedding Prospect** pipeline is used to track prospects who wish to use your expertise for taking their wedding photographs.

2. The **Portraits Prospect** pipeline is for tracking prospects who want to use your services for creating their portraits.

You are encouraged to set up and customize pipelines 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 two pipelines to projects.

1. A **Wedding** pipeline is useful for tracking all wedding photography projects. The stages of the pipeline start with the engagement planning session until the final products are delivered.

2. The **Portrait** pipeline is useful for tracking the status of portrait projects. The pipeline covers all stages beginning with the portrait session until the final portraits are delivered to the client.

If you offer other types of photography services, you can completely customize how you manage those projects by setting up your own pipelines.

Contacts

Contacts are the people you do business with. In this template, there are categories such as such as *Client*, *Personal*, *Prospect* to define the contact's connection to your business. Moreover, there are keywords such as *Mailing Address*, *Portrait*, *Wedding* to further describe contacts in your database.

You can create custom **roles** for describing the function or responsibility of a contact in an organization, project, or opportunity. A **relationship** links two contacts together and describes their connection. Using this template, you can specify relationships such as *is engaged to*, *is friends with*, and *is related to*.

In this template, there is a custom Bride & Groom label that relies on the *Mailing Address* keyword and a relationship to create a useful label. You can completely customize roles and relationships to better suit your needs.

Suggested Workflow:

1. Create a new contact.

2. Enter the essential information.

3. Assign a category to describe what kind of a contact it is. By applying categories, you can classify and divide the contacts in your database.

4. Add keywords to further distinguish your contact. For example, a wedding client should be categorized as *Client* and tagged with the keyword *Wedding*.

   Add the *Mailing Address* keyword to the contact with an address that is receiving the mail. For example, you may have a wedding client where the couple are not living together. Instead of sending identical mail to both addresses, you can tag the *Mailing Address* keyword on one spouse to identify that as the correct mailing address.

5. You can link the contact to an organization and specify a **role** that defines the job function of the contact in that organization. To create a relationship between contacts, you can select a contact, click the link button and enter a second contact's name. A shortcut 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 a category and keyword(s) to an organization. Linking a contact with an organization allows you to specify a role such as *customer*, *decision maker*, or *employee* played by the contact in that organization.

You can also use organizations to record the venues you frequent for shooting sessions to maintain a convenient access of the venue's information.

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, you can assign categories such as *At Home*, *At Studio*, *With Client*, and *At Event* to categorize tasks based on location.

Appointments

An appointment is an activity that you have agreed to do at a certain time on a specific date. You can create appointments and assign a status, start date, start time, end date, end time, duration and set up reminders. In this template, Daylite gives you the ability to assign categories such as *Bridal Shower*, *Ceremony*, *In Studio*, *Outdoor Shoot* and many others to your appointments.

Activity Sets

An activity set is a predefined collection of tasks and appointments. You can create activity sets for any repeatable pattern of activity you often perform. Activity sets reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has four different activity sets.

1. The **Prospect** activity set includes tasks and appointments that are essential for convincing a potential client and winning their business.

2. The **Pre-Wedding** activity set includes all tasks and appointments you should complete before the client's wedding.

3. The **Post-Wedding** activity set includes all tasks and appointments you should fulfill after the client's wedding.

4. The **Portrait** activity set includes all tasks and appointments that you should complete for creating a portrait from start to finish.

You can create your own activity sets for items in Daylite by preloading the tasks and appointments in your activity sets. Daylite gives you the ability to customize activity sets, so that you can add, remove and edit tasks and appointments to better suit your photography 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.

Reports

This database template has the following three customized reports.

1. The **Opportunities Won versus Created** report displays the number of opportunities won compared to the number of opportunities created. This report can give you a good idea of how many opportunities you need to win to be able to reach your business targets.

2. The **Past Weddings** report displays all the reports that were completed 12 months ago. You can use this information as a record of how many weddings you have completed. Moreover, you can retain this information for future business opportunities such as baby and family portraits.

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

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.

Labels

The **Wedding Mail Address Label** allows you to print a label with the both couples' names and one address. Since this label is highly customized, there are strict requirements that you need to follow to use this label.

- In each contact, you must specify the address you would like for the label by tagging the keyword ‘Mailing Address' to the correct contact.

- Between each couple, you must assign the two-way relationship 'is engaged to' indicate their connection.

- You must keep the Mailing Address smart list in contacts without changing the smart list name.

If you change any of the above requirements, the label will no longer be valid.

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 three forms:

1. The **Wedding Details** form allows you to track the wedding ceremony details such as the date, time, and location.

2. The **Album Details** form stores information about the album specifications (such as color, size, cover and finish) chosen by the client.

3. The **Final Invoice Detail** form contains information about the total number of items produced of each type in the business (such as total number of photographs, ceremony photos, reception photos, frames, albums, and CDs).

You can have an unlimited number of forms in Daylite and each form typically has between 10 and 30 fields. These fields are completely customizable and you can choose to use different data entry formats such as text fields, combo boxes and checkboxes. You can also print or email a form for sending it to the client.

Resources

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

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