Daylite for print and design professionals

This database is designed to help individuals working in the print and design industry 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.

The print and design industry often work with meticulous details ranging from technical to artistic requirements. This database template makes use of forms to help track the details and be able to distribute that information to another party through email or print it out.

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 pipelines to visually track how your opportunities are 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. You can also 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 print and design services and will contribute towards increasing your company's revenue. When you create an opportunity, you can associate the following pipeline to an opportunity:

1. The **General Business** pipeline is used for all prospective 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.

You can set up new custom pipelines to enable 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 projects.

1. The **General Design** pipeline is useful for tracking all design projects. The stages of the pipeline start with the initial contact until a contract is signed.

2. The **General Print Design** pipeline is useful for tracking all the print and design projects.

If you offer other types of design services, you can completely customize how you manage those 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 *Client*, *Competitor*, *Contractor* to define the contact's connection to your business. Moreover, there are keywords such as *Advertising*, *Web*, *Video* to further describe your contacts in this database.

Contacts are linked together by relationships. You can specify relationships such as is a client 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 provide a detailed classification of your contacts. For example, all printing clients should be marked with the category *Client* and tagged with the *Print* keyword. 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 to 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*, *Collaboration*, *Printing* 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 *Design* and *Research* to further characterize the appointment. If you charge fees based on time, you can block a particular period of time on your Daylite calendar, then link it to your project for planning and future references.

Activity Sets

An activity set is a collection of tasks and appointments that you use 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 three different activity sets:

1. The **Hire Freelancer** activity set includes tasks and appointments to hire or approve a freelancer. Add this activity set to the potential freelancer's contact record when you first create it.

2. The **Get Printing Cost Estimate** activity set includes all the tasks that must be completed before materials are sent to print. You can add this activity set to contacts, projects and opportunities.

3. The **Prepare Proofs for Client** activity set includes all tasks required to print proofs and getting them ready for presentation. You can add this activity set to projects.

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 that you can add, remove and edit tasks and appointments to better suit your print and design business.

Reports

This database template has three 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.

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 displays 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 groups in your database. This template has the following two forms.

1. The **Print Requirements** form can be used to track all the details required from a printing job. For example, there are entries that include format, size, and ink. Add this form to a print opportunity or project.

2. The **Web Requirements** form is used to track details of a web design job. For example, there are fields such as the number of pages and browser compatibility. Add this form to any web design opportunity or project.

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 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/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.