Daylite for software development professionals

Overview

This database template is designed for professionals providing custom software solutions to their clients. The template shows how you can use Daylite's powerful features for managing prospects and winning their business. Handle all aspects of your custom development projects with ease and simplicity, deliver successfully, and gain your client's trust (and possibly, more work as well). If you are an experienced Daylite user, you can also benefit from this template by looking at the workflow and suggestions to enhance your productivity.

General Workflow

The following summarizes a general workflow for using this template.

1. Once you identify a prospective client, the first step is to create a new opportunity. Link the key people involved to the opportunity. Assign a suitable pipeline to track the progress of the opportunity. Create activity sets for the tasks and appointments which tend to be repeated frequently and in the same way, and should be completed for winning the opportunity.

2. When the prospective client agrees to your conditions and you decide to continue working, create a new project from the opportunity. As you link contacts, assign a role to identify the contact's main function in the project. Add a suitable pipeline that closely matches your workflow for tracking the progress of your project.

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

Opportunities

Opportunities represent the potential for new business. For example, in custom software development, a phone call where the caller expresses interest in your services for getting a job done is an example of a new opportunity.

Once you create a new opportunity, link the key people to the opportunity and assign meaningful roles. You can add the "New business"" pipeline in this template for tracking the progress of the opportunity or you can create your own custom pipelines.

Projects

Projects are like containers for grouping work. For example, development of a web system for a client. All other items in Daylite have relevance with respect to the project. When the prospective client agrees to your terms and conditions and you decide to continue working, create a new project from the opportunity. Link the relevant items to the project and start working.

Use pipelines for tracking the progress of your projects. This template includes a "Development" pipeline for monitoring all the stages in the development process. However, you can create your own custom pipelines.

Contacts

Contacts are the people you work with in your business. The contacts view is the most appropriate view to start with when you receive a phone call from a prospect enquiring about your services. Create a new contact and fill in the details for that contact. If the contact works for a company, create a new organization, add the details, and link the contact to the organization. As you proceed further, you can add other specialized data for the contact such as category, keywords, role, and many others.

Categories and keywords

Categories are useful for classifying and dividing the items in your database. For example, in this database, you can use categories such as *Client*, *Competitor*, *Employee* and many others for classifying your contacts. Projects can be tagged with categories such as *Desktop app*, *Mobile app*, *Web app*, and *Internal app*.

Keywords allow a more detailed classification of contacts, organizations, projects, and opportunities. They can be used to tag these items with descriptive words or phrases that will help you find the right data more easily. For example, in this template, you can tag projects with keywords such as Apache, Cocoa, MySQL, Perl, PHP, and many others.

Depending on how you wish to classify your data, you can set up categories and keywords that make most sense in your business.

Roles

When you link contacts with organizations, projects, or opportunities, they are connected by a role. A role describes the kind of work or function someone has in an organization, project, or opportunity. This template has different kinds of roles (such as internal project manager, decision maker, client, protagonist, antagonist, competitor, accounts executive, and many others) that you can use or you can create custom roles that would make more sense to your business.

Activity Sets

Activity sets are useful for workflow that needs to be completed in the same order or is time sensitive. They reduce the need to manually create the same tasks and appointments for multiple projects of similar nature. This template has the following activity sets:

- **Quote**: This activity set includes the tasks involved for getting a quote approved.

- **Design iteration**: This activity set includes the tasks involved in a design iteration.

- **Development iteration**: This activity set includes the tasks involved in a development iteration.

- **Monitor implementation**: This activity set includes the tasks involved in tracking and monitoring the implementation process.

- **Quality Assurance**: This activity set includes the tasks involved in a testing iteration.

These activity sets come with pre-defined due dates. However, if you wish to use the activity sets feature without setting due dates for tasks and appointments, you could do so. In the Activity Sets pane of Daylite Preferences, keep the "Start: _____ Day(s) after start date" or "Due: _____ Day(s) before end date"" blank.

You can create custom activity sets that are more suitable for your workflow.

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.