

Daylite 101 Training

Description

Everything in Daylite revolves around achieving objectives. This Marketcircle Certified comprehensive 2 day course will familiarize students with the most effective workflows for getting the most out of Daylite in order to grow your business.

Understand the power of defining relationships between the people and companies you deal with including searchable email histories for everyone. Schedule meetings in minutes with shared calendaring. Systematically track every opportunity that comes your way and avoid sales slipping through the cracks. Use tasks organized into projects and learn how to quickly delegate them amongst team members.

What You'll Learn

- Understand the Concepts behind Daylite
- Be comfortable navigating through Daylite's interface
- Be aware of new ways in which Daylite can increase business productivity
- Includes reference book containing exercises and step-by-step guides.

Course Outline

Lesson 1: Daylite Concepts

Lesson 2: Overview of the Interface

Lesson 3: Creating Contacts & Organizations

Creating New Contacts & Organizations
Manually creating links between objects
Understanding Roles & Relationships

Lesson 4: Scheduling Appointments & Meetings

Creating New Appointments & Meetings
Using the Due List Panel
Viewing Other Users Calendars

Lesson 5: Creating & Linking Notes

Creating a New Note
Activity Pane Interface

Lesson 6: Understanding DMI & Common Workflows

Preferences in Mail
Create Contact from within Mail
Link Mail with Contact, Project & Opportunity
Create New Tasks, Appointments, Projects or Opportunities from Mail

Lesson 7: Searching & Filters

Using Quick Find
Global Search
Using Filtered Views

Lesson 8: Smart List Basics

Creating Smart Lists for Contacts & Organizations
Creating Regular Lists

Lesson 9: Bulk Edit & Forms

Using Bulk Edit for Contacts and Organizations
Inputting Forms

Lesson 10: Corresponding Using Daylite

Emailing from Daylite
Performing Mail Merges from Daylite

Lesson 11: Managing Sales using Opportunities

Creating a New Opportunity
Create Tasks & Appointments Linked to Opportunity
Applying an Activity Set
Using Estimates
Working with Pipelines

Lesson 12: Project Tracking

Creating a New Project
Creating Sub-Tasks and Followup Tasks
Delegating Tasks

Lesson 13: Generating Print Layouts & Reports

Exploring Built-In Print Layouts
Using the Live List Print Layout
Using the Built-In Reports