Grow your business, add clients, deliver on projects, stay on track!

DAYLITE

The easiest way to stay focused on what counts!

DayLite 1.7
Quick Start Guide

Launching DayLite for the First time

The first time you launch DayLite, you will see the 'Trial mode' window. If you've already purchased DayLite, you can click on the 'Enter License' button to enter your serial number and licensed (see 'Entering your License' below). You can always enter your license at a later stage.

Note: There is no difference between the trial mode and a license copy of DayLite. The trial will end in 30 days. Even if your trial runs out, you will not lose any data. Simply enter a serial and licenses and continue working.
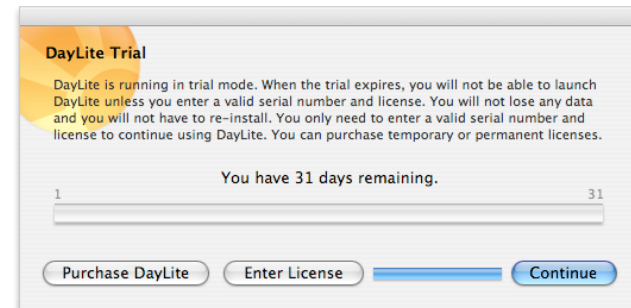
First Run Options

Once you've entered your license or you've hit the continue button on the 'Trial mode' window, you will be presented with three options.

1) Use this option to create a database with your own data

2) Use the Sample database for training and evaluation purposes. This button will log you in as Mary Jennings in the Sample database. You can skip to the 'Main Window' section if you chose this option.

3) Use this option if you already have a database or you are supposed to connect to a database on a remote computer. You can skip to the 'Main Window' section if you chose this option.
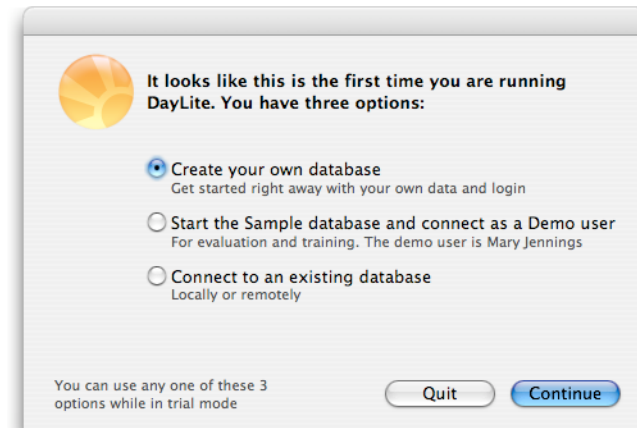
Launching DayLite after the First Time

After your first run, DayLite should automatically log into your the last database (Sample or one you've specified). You can always change this behavior by going to the preferences window. You can also change which database you want to connect to.
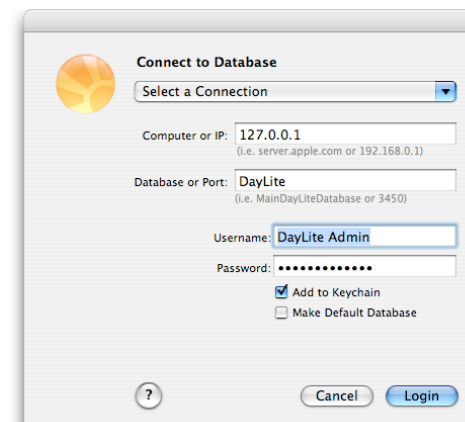
Creating your First Database

Currently there are 3 template databases. For most users, the 'Standard' template will do.
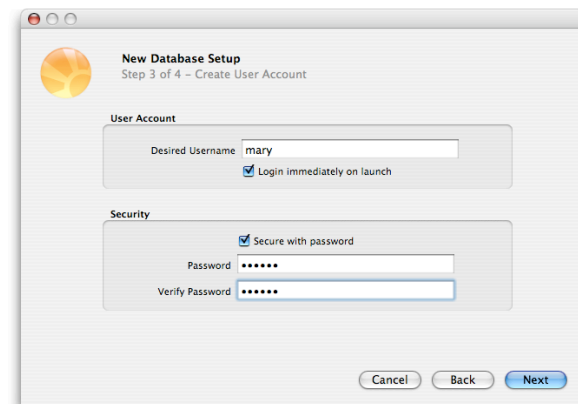
Give your database a name and specify if you want this to be your default database and whether the database should start automatically when your computer starts. Un-check the 'Start at boot' switch for non-essential databases.
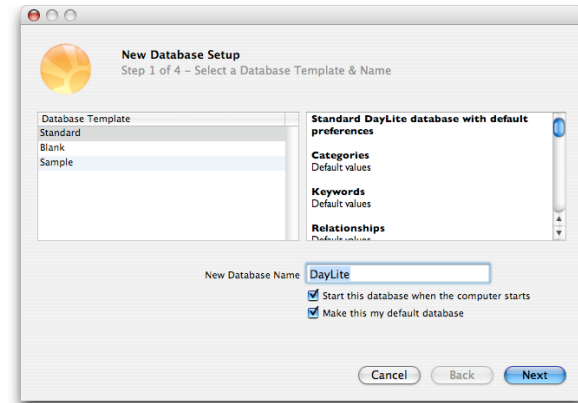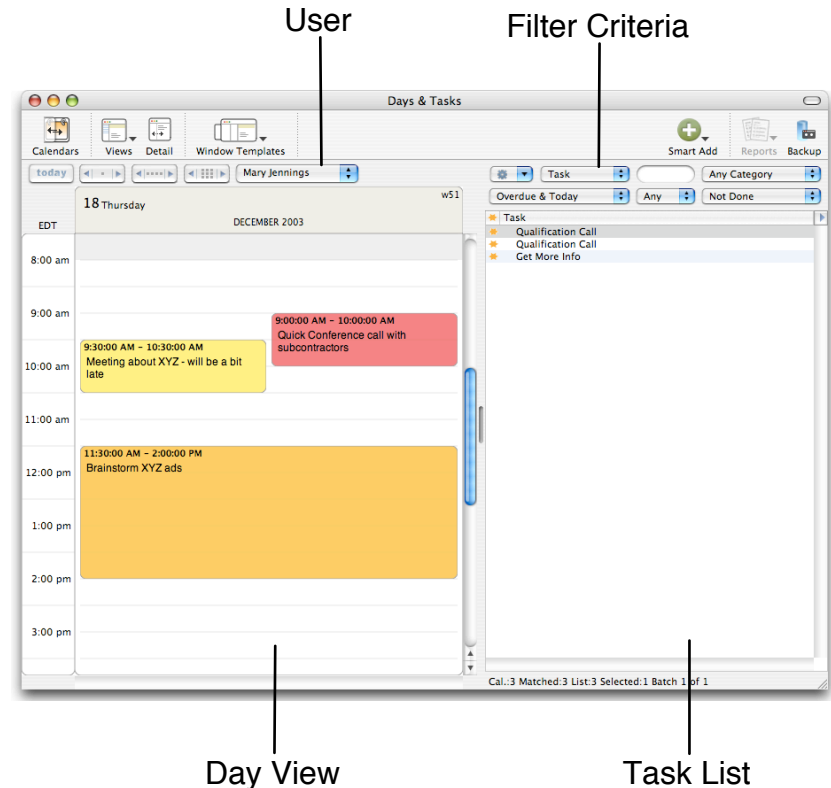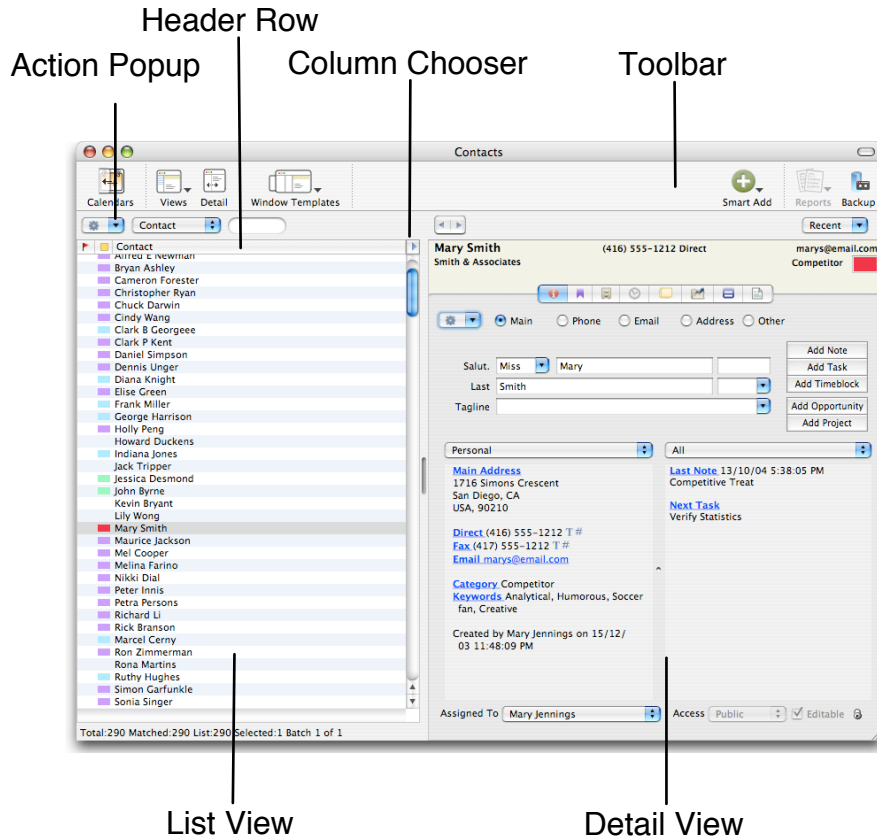
Enter your personal contact information
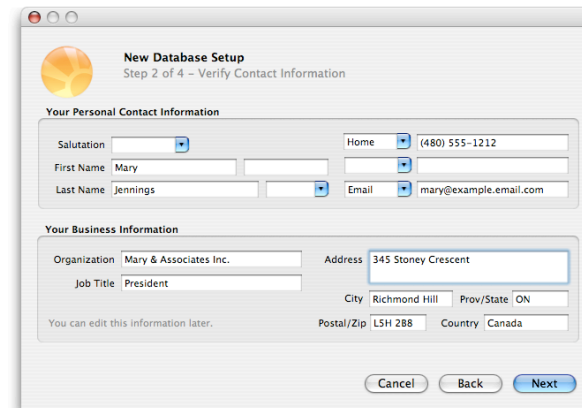
Specify your login name. Consider using a password for security reasons.

The Main Window

The main window is where you will view all your data. If you have the detail view enabled, you will also edit your data in this window.
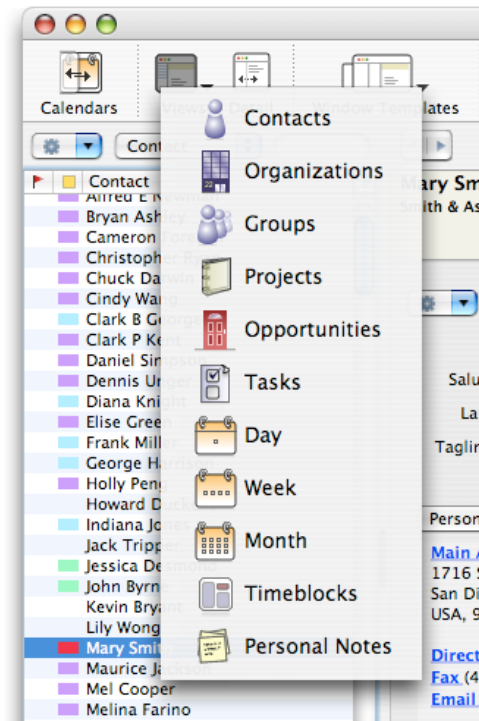
Header Row

Action Popup   Column Chooser   Toolbar   User   Filter Criteria

List View   Detail View   Day View   Task List

The Toolbar

The standard toolbar provides the most used features in DayLite. You can customize the toolbar to suit your needs.
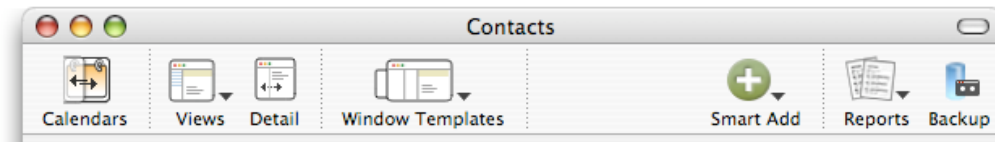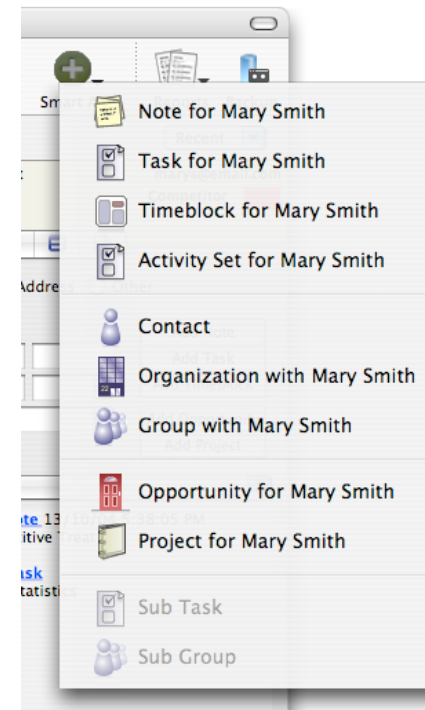

The 'Views' Button

This toolbar item gives you the option to switch between the various views in DayLite.


The 'Smart Add' Button

This toolbar item gives you the ability to add 'linked' objects where it is appropriate. The 'smart add' behavior is dependent on what you have selected in either the list or the detail view.
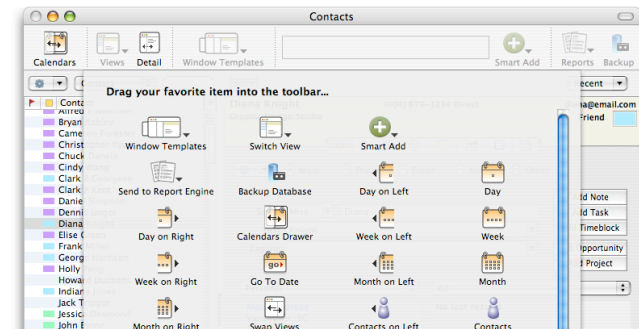
The 'Reports' Button

This toolbar item will present you with the available reports for the currently selected object(s). The list is different for each object type.
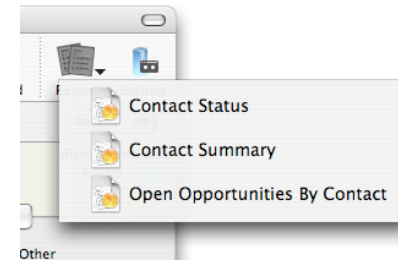
Other Toolbar Buttons

DayLite offers many toolbar choices. Simply add the ones you feel will make you most productive.

Customizing a List

A list can be customized by adding and removing columns (click on the little blue arrow). You can also resize and reorder each column by dragging the header row or the edge of a header column.

You can sort a column ascending, descending or neutral by clicking on the header.
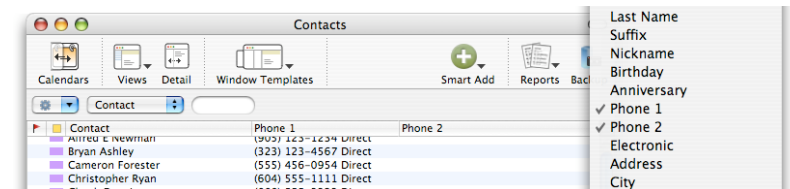
The 'object' Card

You edit an object (such as a contact) in a card. Each card (with the exception of the note card) has several tab items. Please explore each tab to see the full depth of the information you can store and manage in DayLite.

Note: You can change the tab bar style to show text, icons or both in the Preferences > Appearance pane.
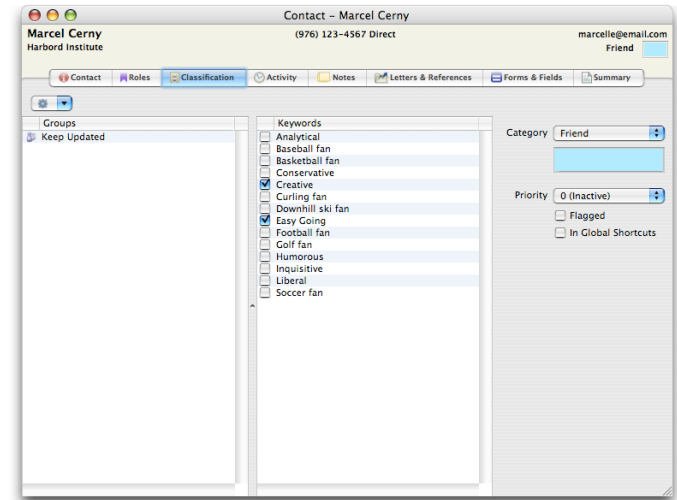
Card within the Main Window

The detail view of the main window displays the card for the currently selected object. When in this mode, the card replace themselves instead of opening up in a different window. This behavior is similar to a web browser. It remembers your last 20 objects.
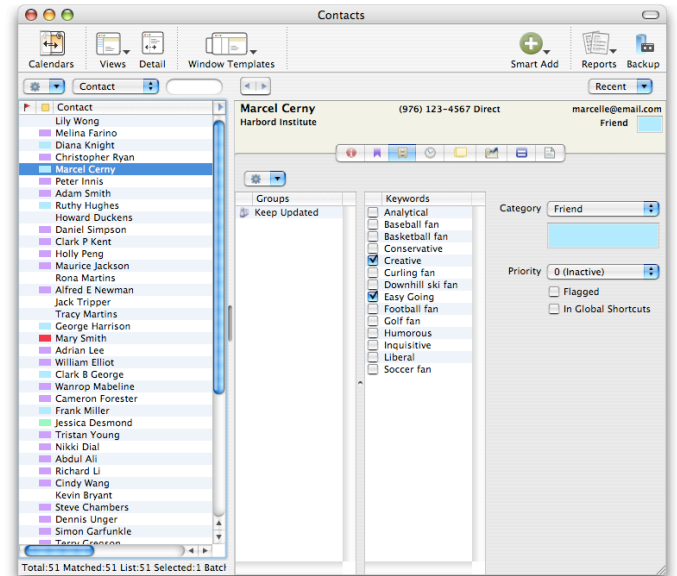
Going beyond Contacts and Appointments

DayLite's data structure is made of 8 major types. The interlinks between these 8 types (objects as we call them) are what make DayLite very special

Contact (Organization, Groups)

A contact represents a person. An organization represents a company. Contacts play 'roles' in one or more organizations. A group is a collection of contacts and organizations that share a common interest.

Calendar (Task, Timeblock)

Once you've added contacts, you will want to schedule activities with them. Tasks are to-do's with a due date. Timeblocks are appointments or full day events with a start and end time.

Opportunity

An Opportunity represents the potential for you to get new business. You use an opportunity when you are interacting with a contact and that contact show interest in your product or service, but you haven't yet closed the deal. You track this 'potential' new business using an Opportunity. You can flow opportunities through stages. You can generate pipeline graphs, revenue forecasts and win/loss trend. These tools help you stay focused on bringing in and closing new business.

Project

Once you've closed new business, you want to create a project and track that specific deliverable. Unlike typical project management applications, Projects in DayLite are purposefully simple. You can link tasks, timeblocks, notes, contacts, file/web links to a project making it easy for you to stay focused on what needs to get done.
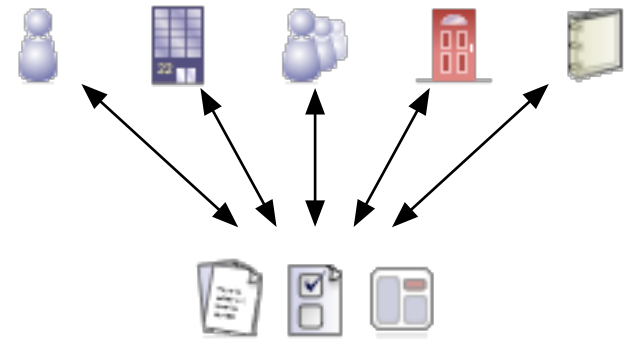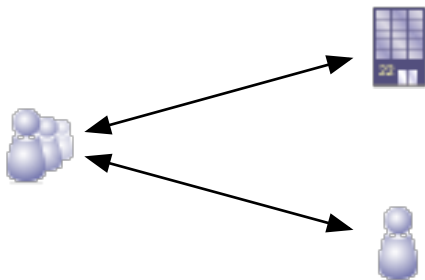
DayLite Objects

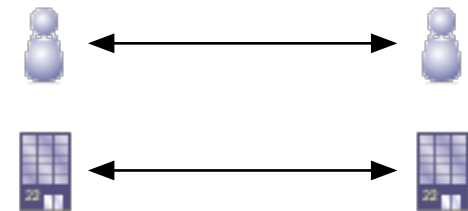|			
Contact	Opportunity	Group	Timeblock
Organization	Project	Note	Task
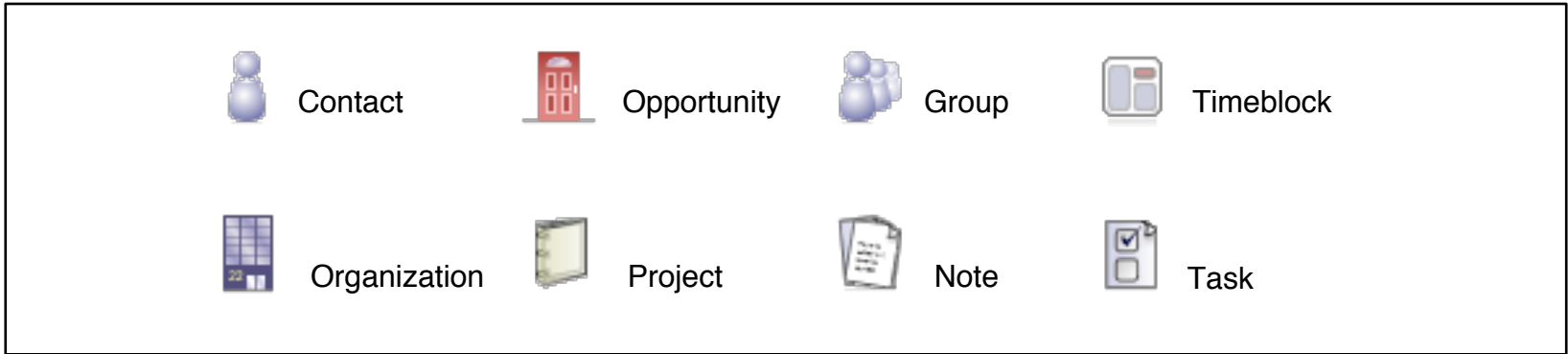
Contacts play Roles
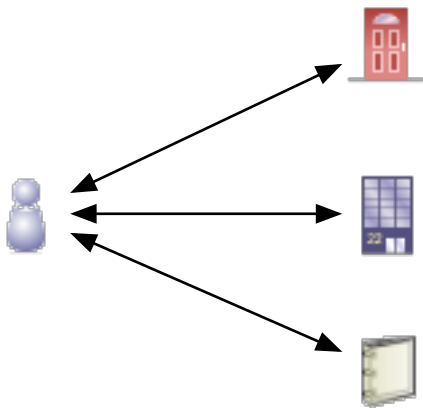
Activity Links

Groups are collections

Reciprocal Relationships

Adding a Contact

When you are adding a contact, a sheet will appear. This sheet gives you the opportunity to create an organization at the same time. If DayLite finds a duplicate, it will warn you.

You can use the note area as a scratch pad or for a note that can be linked to both the contact and/or organization.


Adding Other Objects

When creating other objects, DayLite will simply present you with the card of that object. If you have the detail view active, the new card will appear there.

Adding Linked Objects

When you 'add' an object that should be automatically linked to the current selection, use the 'Smart Add' toolbar item or the Create > Object For main menu item.

Linking Objects

If you've created an object and you realize that it should be linked to another object. You can use the 'Link Sheet'. You can trigger this sheet from the 'Action' popup (usually below the tab bar and to the left).
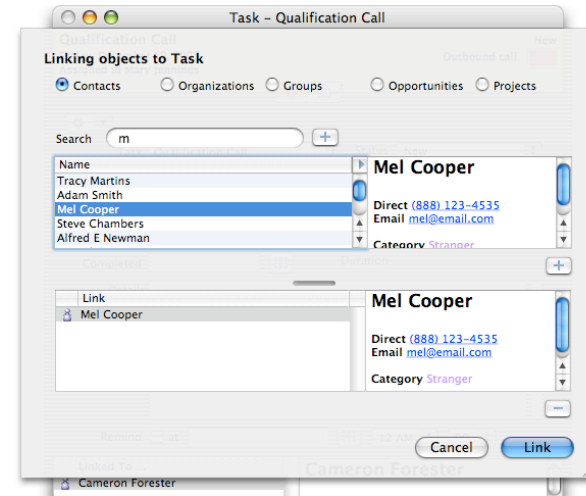
Linking a Contact to an Organization

A contact plays a role in an organization, opportunity or project. In this case, you will be presented with the option to specify the role.
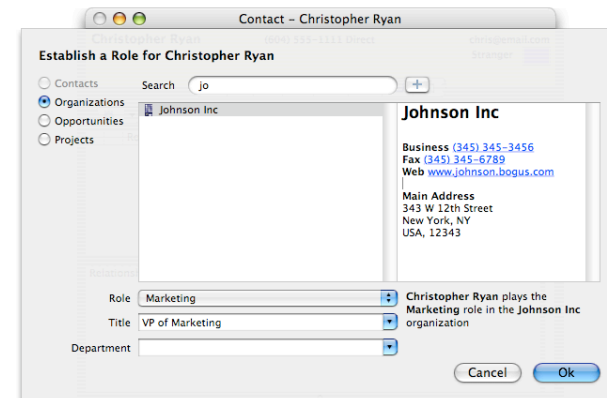
## Linking a Contact to a Contact

We call this a reciprocal relationship. You can specify 'how' the contacts are related (i.e is husband of / is wife of). The same principle can be applied when linking an organization to another organization (i.e. is parent of / is subsidiary of)
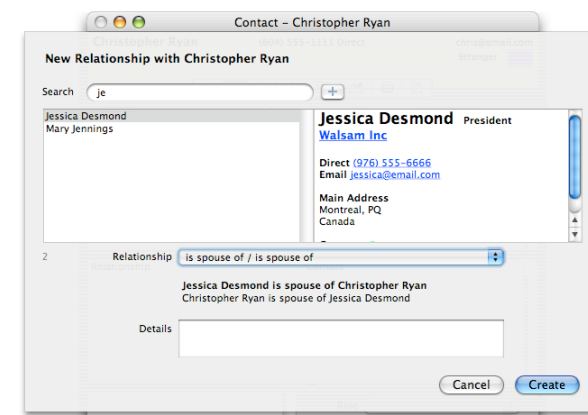
Filtering and Searching

You have 3 ways of searching for data in DayLite.

1) You can use the Quick Filter located at the top of each list (see the manual for possible wildcard patterns).
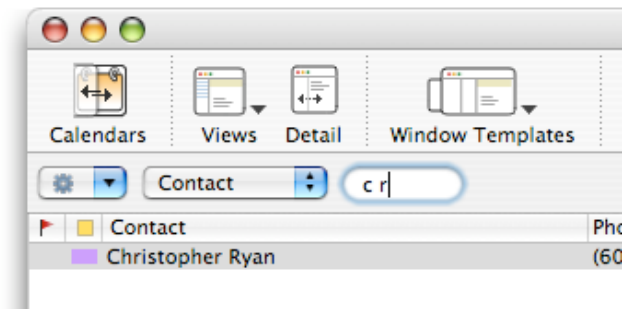
2) You can run the Advanced Filter sheet to specify multiple criteria. You can save the filter and call it back up at any time. Use the 'Action' popup (above the header row) to show the advanced filter or to run a saved filter.
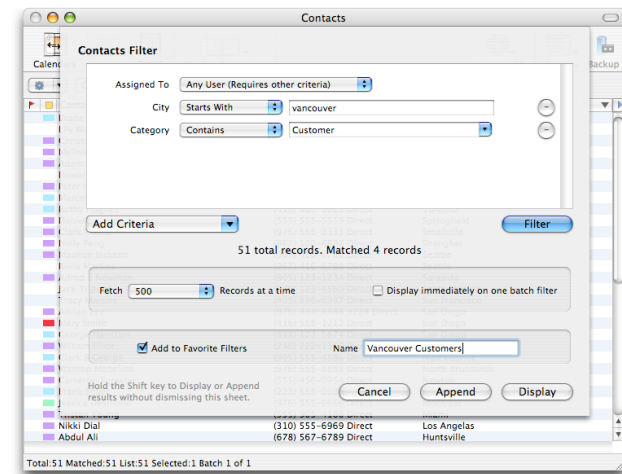
3) You use the 'Global Find' window to search the whole database.

Note: You define where to search using the 'settings' button on the Global Find window.

Printing

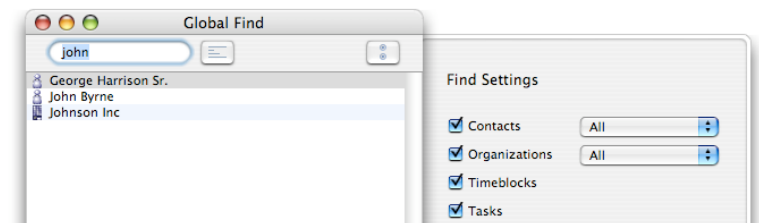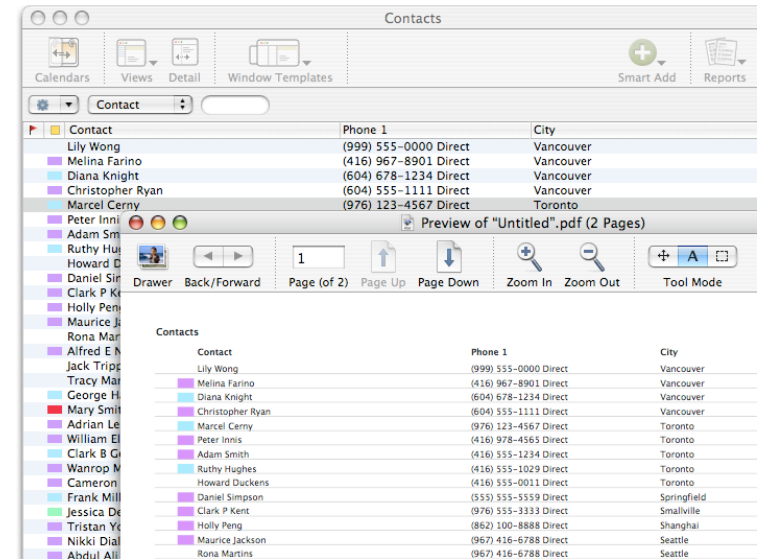DayLite prints the main window in a WYSIWYG fashion. For example, the calendar views can be printed just as you see them on screen (you can add and remove dates). The list printing works in the same way. It will print a list based on the columns you have displayed keeping the proportions in mind.

You can set the page size, scaling and margins in the File > Page Setup window.

Generating Reports

You can run certain reports using the 'Report Center' or you can filter data using the list views then 'push' that data to a 'Report Template'.

You can customize Report Templates to your liking. The mechanism is very powerful and requires a bit of technical knowledge to customize. Check the Marketcircle website on a periodic basis for additional report templates.

Importing & Synchronizing Data

You can import data into DayLite from several sources. Please see the File –> Import menu to see the options. You can also synchronize with Apple Address Book and PDA's.
Another option is to create 'offline' databases. Please read the manual for more information.

Note: DayLite does not use iSync at the moment.

Preferences

DayLite has many customizable options. Use the preference pane to customize these options. You can customize categories, keywords, roles, relationships, forms, extra field names, organization types, regions, industries, opportunity stages, products, win/loss reasons, activity sets, letter templates, Palm sync options, Address Book sync options and more.
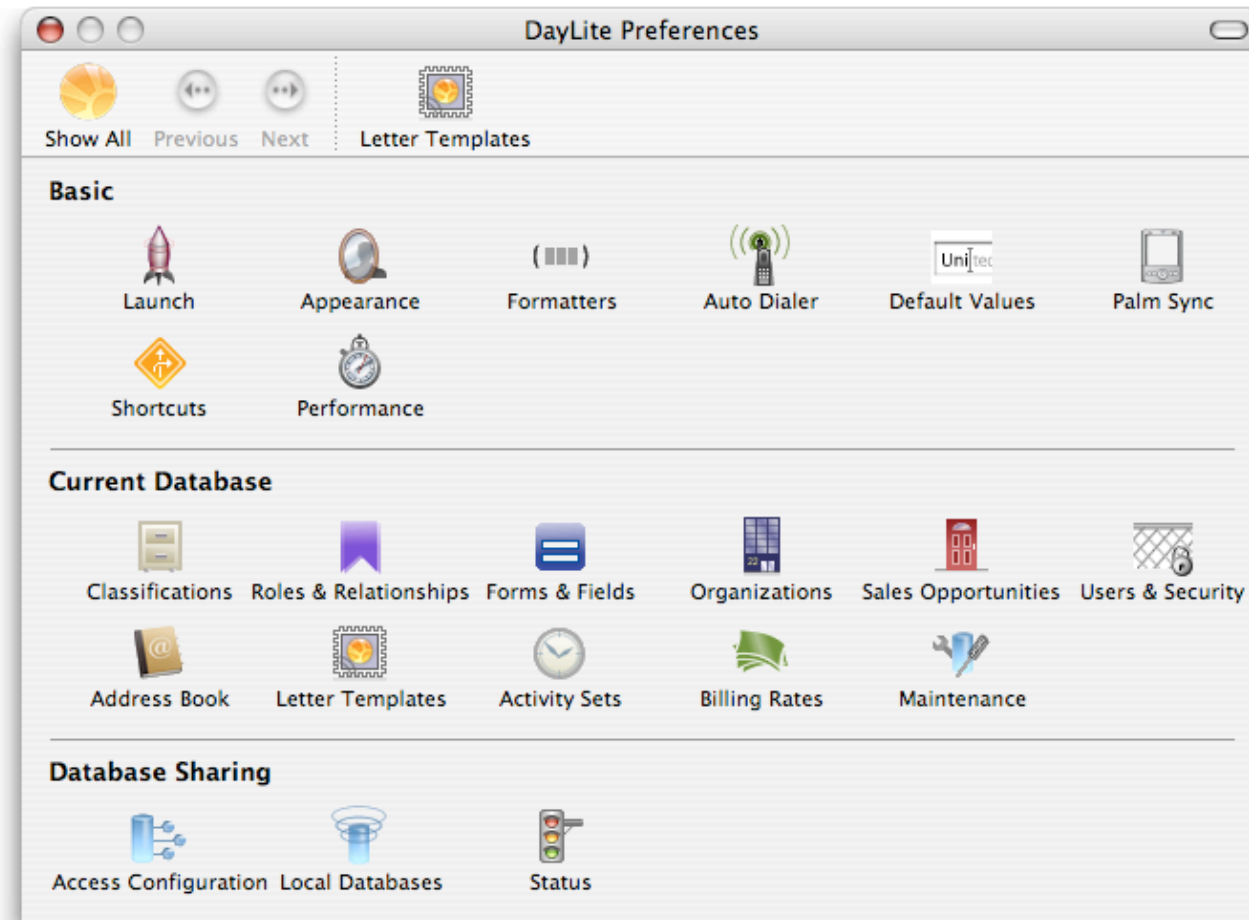
Multi User Options

DayLite includes a powerful client server database engine. You can share your database with colleagues.

You can add users, setup a user hierarchy to reflect the company structure, restrict users from using certain functions and enable the permissions system. (see the manual for more details)

Note: A Mac which shares databases must have a static IP address.
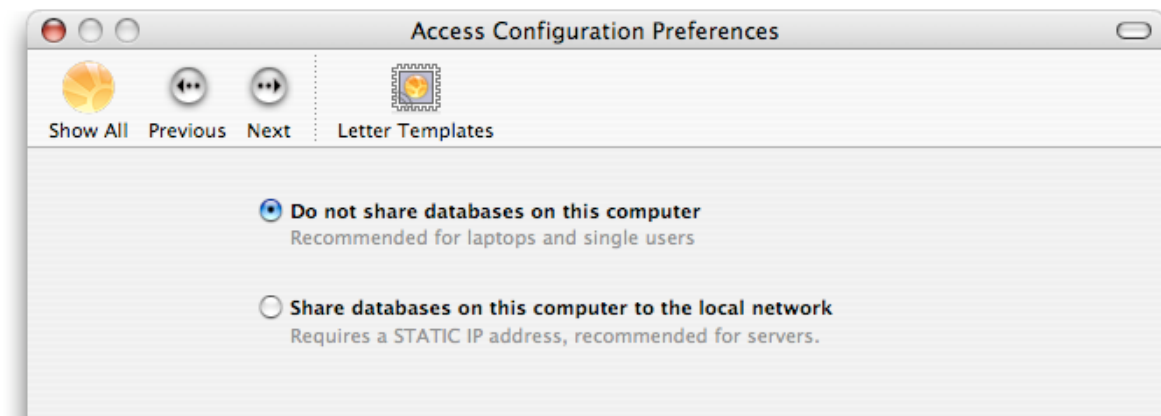
Performance Tips

If you have a large database and you notice that performance is sluggish, please visit both the performance and maintenance preference panes. For example, you should not have performance issue with databases with as many as 30000 contacts.

Note: Please visit our support page for specific performance tips.

Entering your License

You can get to the license window by clicking on the 'Enter License' button from the Trial mode window, or you can select the DayLite > Licenses... menu item.

DayLite licenses are cumulative. You can add licenses at any time. You can purchase a 1 user license first, then a 3 user license or any other combination and simply add the new license.

Note: All computers using DayLite must have all the licenses in order to work properly in a networked environment.
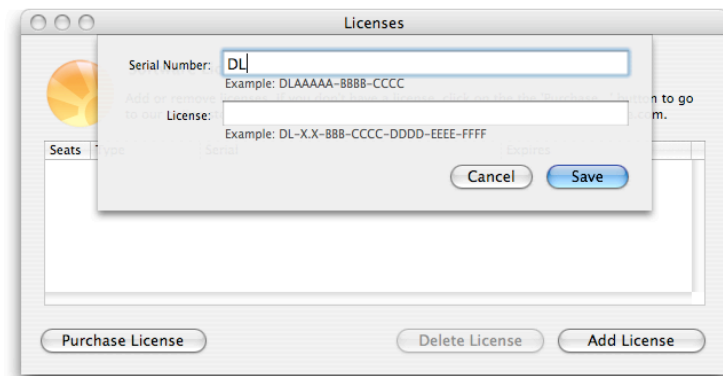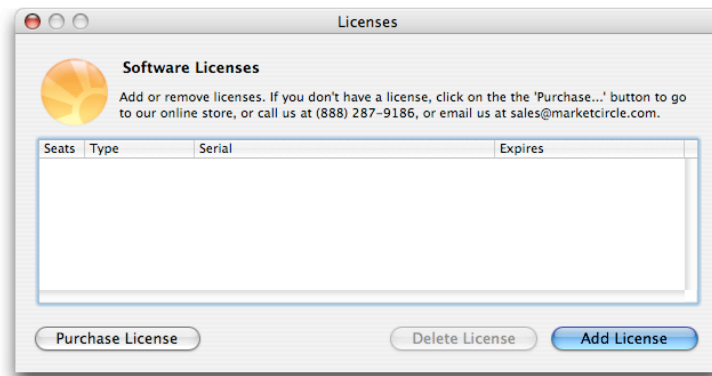
Learning more

Please review the DayLite Foundation manual for more information. If you do not have the manual, you can download it from our website at any time. You can also order a printed & perfect bound copy.

You can also visit our website to learn more:

htto://www.marketcircle.com/
http://www.marketcircle.com/help/

© 2004 Markeetcircle Inc. All Rights Reserved.