

Daylite Overview

The #1 Timesaving Business Productivity Manager



Daylite is the latest version of Marketcircle's award winning productivity management software.

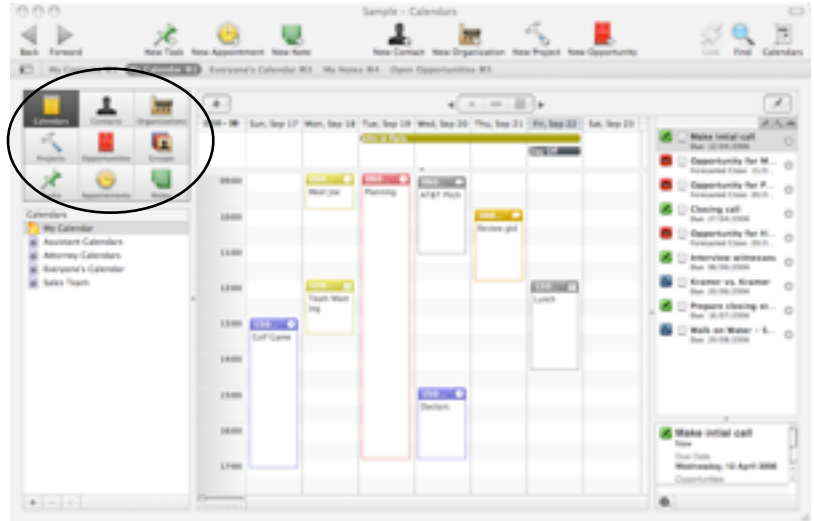
Daylite is a powerful resource for tracking and managing all business activities and outcomes.

Designed for the unique needs of Mac-based businesses of 1-50 people, Daylite offers many time-saving features including shared calendars, shared contacts, shared tasks, shared projects, shared opportunities, seamless integration with Apple Mail, activity delegation, multiple pipeline views, a built-in report writer, sophisticated offline capabilities, and a clean, easy-to-use interface.

This product tour gives you an overview of the most important features of Daylite, Marketcircle's simple to use but powerful productivity management software.

Main Navigation

The Daylite interface has a Main Window that provides an overview of everybody's schedules, opportunities, projects, and tasks as well as access to all of Daylite's features and tools. At the top-left corner of the interface, there is a navigator to open calendars, contacts, organizations, projects, opportunities, groups, tasks, appointments, and notes. The function of each of these individual buttons is explained in this section.



Calendar View. Provides an immediate look at appointments, events and meetings, in daily, weekly, or monthly views. An integrated Due list shows clearly what tasks, projects or opportunities are overdue or pending for the calendar period you are viewing. Use smart-lists to view shared calendars.

Project View. Provides a list of all projects in the system, filtered by smart-lists. Within each project, you can view linked contacts, appointments, tasks, emails, files and notes. You can also view a visual representation of the workflow (pipeline).

Task View. Provides details regarding a list of assignments or duties to be accomplished and their due dates. You can filter tasks using smart-lists. It also shows all the contacts, organizations, groups, opportunities, and projects linked to each of your tasks.

Contact View. Shows at-a-glance details on every contact in the database (employees, prospects, customers, etc.) and their associated opportunities, projects, and activities. You can filter contacts using sophisticated smart-lists.

Opportunity View. Provides a list of all opportunities in the database, filtered by smart-lists. Within each opportunity, you can view linked contacts, appointments, tasks, emails, files, notes, and the estimate, as well as the visual representations of the workflow (pipeline). Opportunities help you in tracking potential business prospects.

Appointments View. Provides a list interface to the calendar information. You can use different criteria in the smart-lists. Displays linked contacts, projects and/or opportunities.

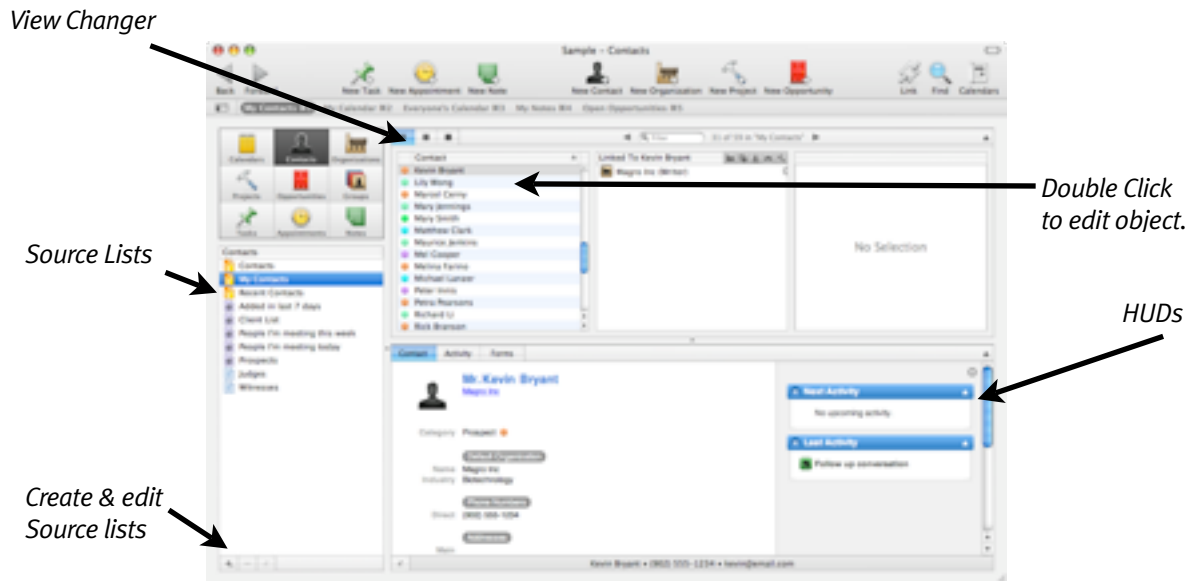
Organization View. Shows at-a-glance details on every company in the database (vendors, customers, etc.) and their associated contacts, projects, opportunities, and activities. You can filter organizations using sophisticated smart-lists.

Group View. Provides a list of all groups. Use groups to collect contacts, organizations, projects, opportunities, appointments, tasks, notes and subgroups that have something in common. Use smart-lists to filter groups.

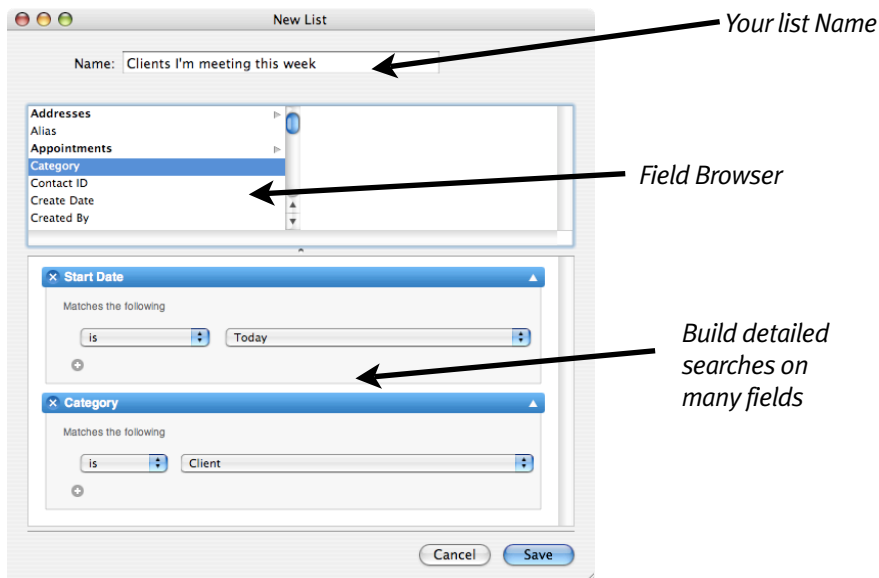
Notes View. Provides a list of all notes and emails in the system, filtered by smart-lists. Each note or email can be linked to contacts, projects, opportunities and/or groups. Emails are created in Apple Mail and sent to Daylite by using Daylite's Mail Integration module.

Main Window

Daylite's Main Window provides an overview of the entire system and access to all of its powerful planning, tracking and reporting features. Intuitive icons make navigation quick and easy. You receive an overview of contacts, projects, opportunities, and calendars, allowing you to get to the information you need when you need it. Daylite's interface, source lists, customizable toolbars, and Mini Heads Up Displays (HUD) allow you to create a work environment to match your working style and needs.

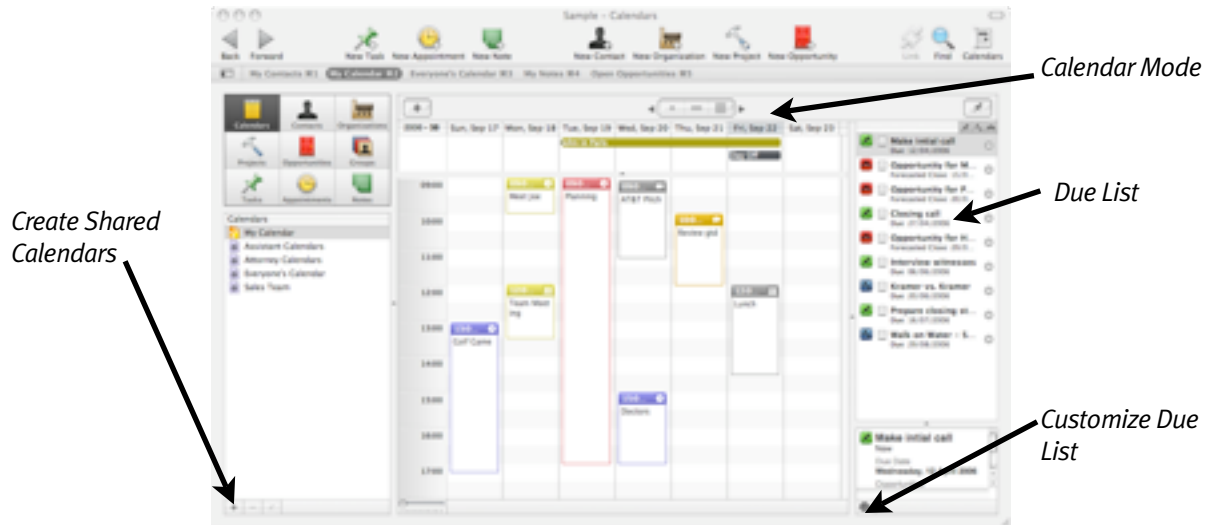


Daylite has source list capabilities, which resemble smart folders in the Apple Finder or smart playlists in iTunes. You can have source lists for every category of information in Daylite. Source lists allow you to customize your view of the data—helping you to more efficiently manage your time.

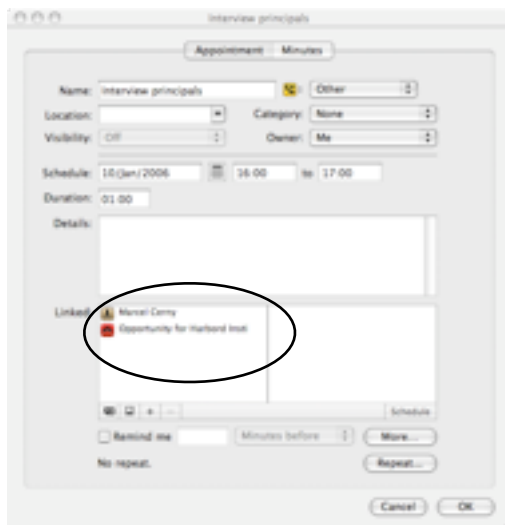


Calendar View

The Calendar view enables you to create layered calendars that show appointments and schedules with any number of users and categories. You can choose to make as many different calendar views as you like, for instance a smart calendar that shows just your team, or one that shows 1 person, or if you like everyone in the company together.



The integrated **Due list** shows clearly what tasks are overdue or pending for the calendar period you are viewing. When an activity is marked as completed, all linked files are updated—ensuring everyone using the system is kept aware and all opportunities, projects, and tasks are synchronized.



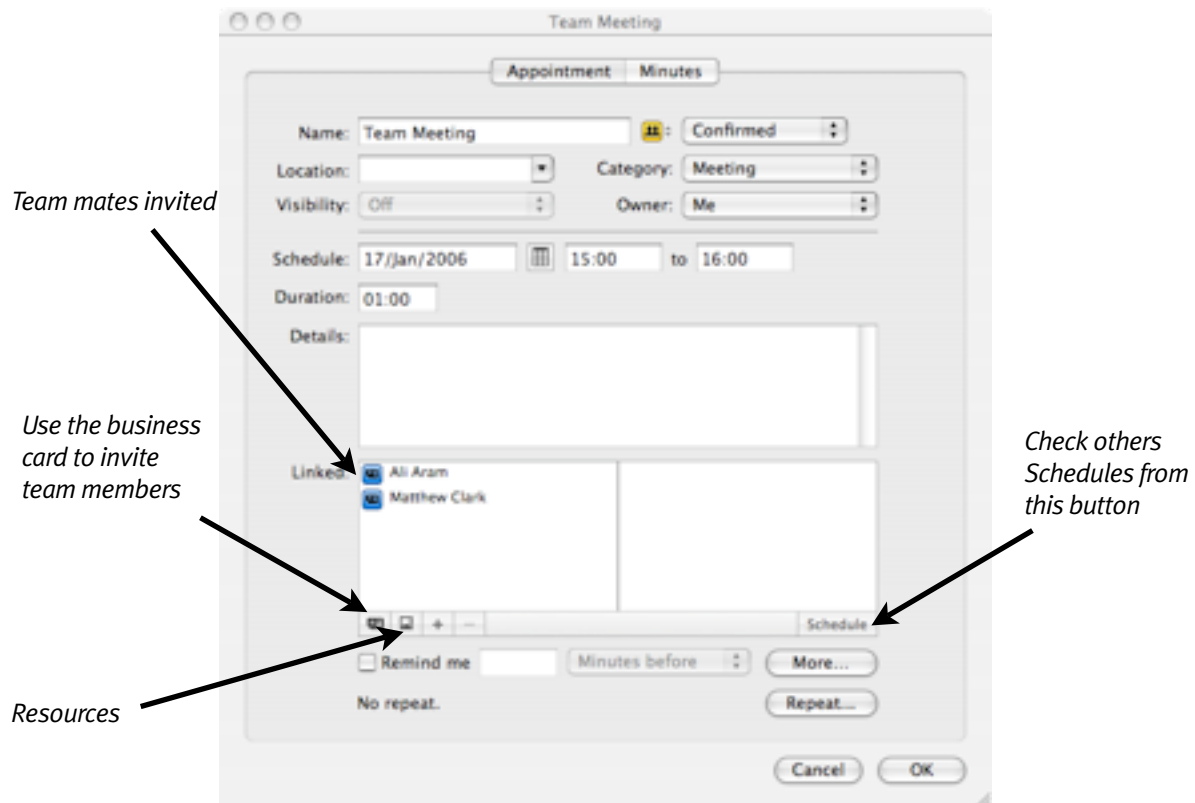
Daylite allows you to define dynamic calendars by specifying a combination of users and categories, enabling your business teams to create overlaid calendars that meet their specific needs. You can setup meetings with colleagues, reserve resources, and receive notification of meeting times or changes in scheduling.

When viewing an appointment, any **linked projects, opportunities, tasks, or contacts** show up automatically as icons in the appointment slot. You can go directly to the linked item by right clicking the icon.

Calendar View - Workgroup

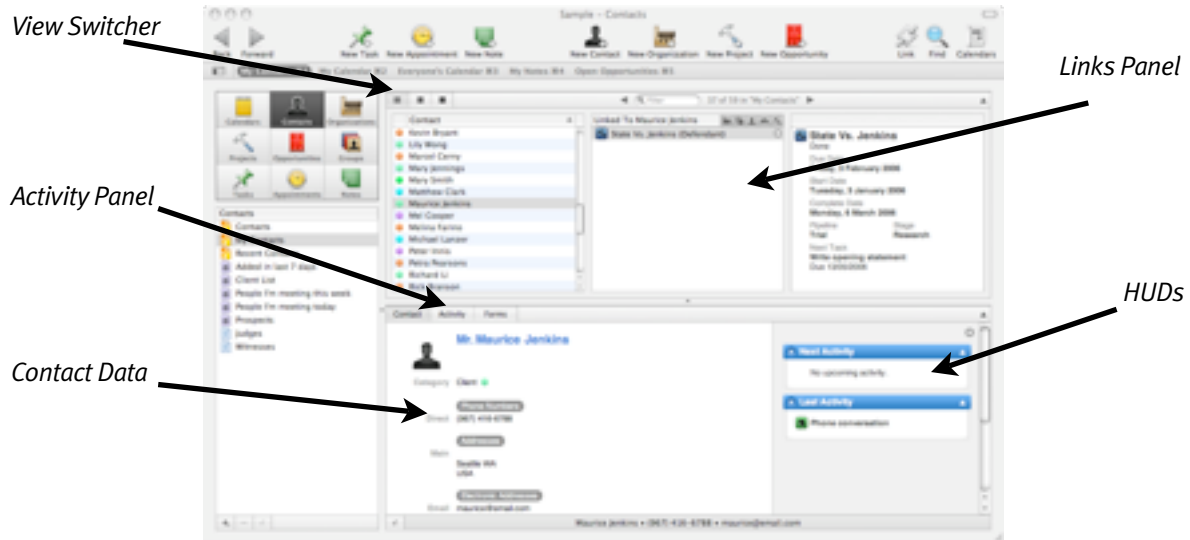
If you are working in a team environment, Daylite helps you in coordinating your activities and planning based on the availability of your teammates. This is because Daylite gives you the ability to open and share the schedules of other teammates in your network.

Taking this one step further, Daylite 3 uses the concepts of **meetings**, where you can **invite team members** to join a meeting with you. You can send and receive meeting notifications to/from other Daylite users in your network. At the same time, you are able to book the **resources** needed for the meeting all at once. You will be notified **automatically** about who has accepted or rejected your meeting invitation, as well as any scheduling changes.



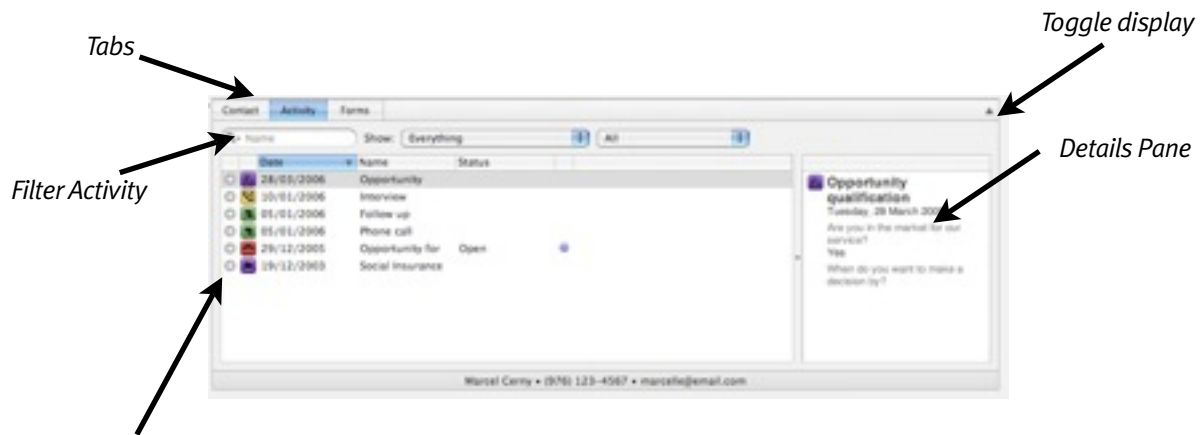
Contact View

With Daylite you can intuitively record, review, retrieve, and manage contact information for customers, colleagues, or suppliers. Comprehensive details of interactions can be tracked and linked to a contact — ensuring important details and histories are maintained. Personalized communications such as invoices and monthly reminders can be linked to a contact for easy access and distribution.



Daylite includes a mini Heads Up Display (HUD) for each contact, organization, project, opportunity, or group — effectively providing a contextual mini browser that shows recently completed and pending activities. Daylite allows you to create your own HUD widgets using CSS and HTML to meet your own information needs. For example, you could show stock quotes or local weather information.

Every task, appointment, opportunity, and project associated with a contact can be easily accessed through the Contact Activities window through the Contact, **Activity** or **Forms** tabs.

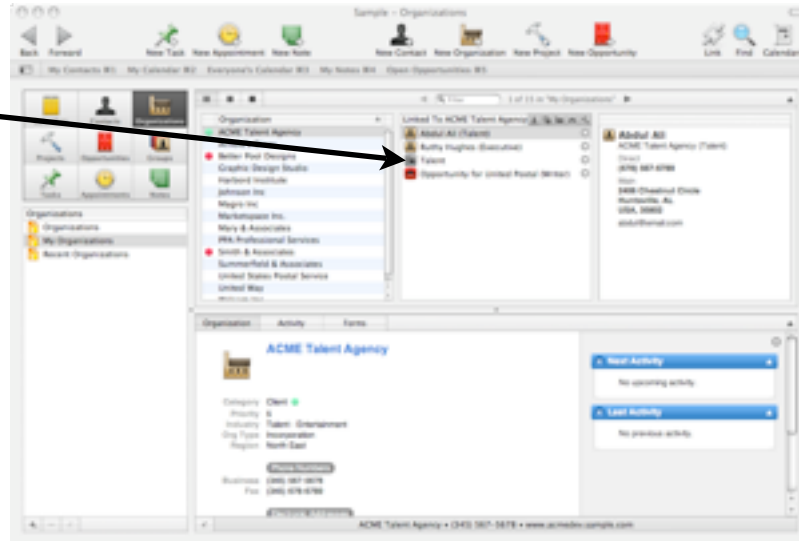


Go To Arrow that will navigate to the item. Double click edits the item.

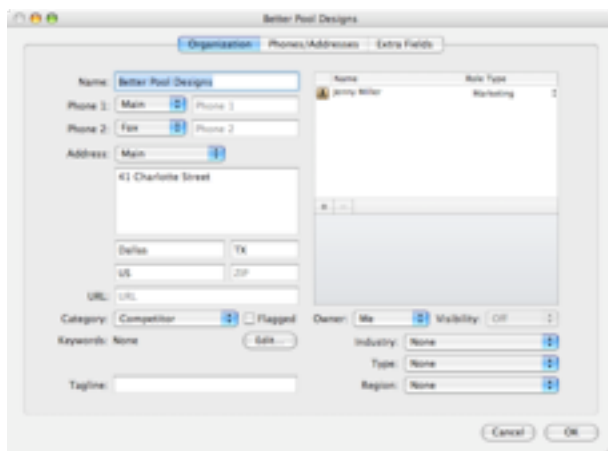
Organization View

An organization in Daylite is essentially a collection of contacts linked to a larger legal entity. Typically, this would include companies, clubs, churches, family or any group of people that are bound to each other. Daylite is designed with an organization object, so you can manage information and relationship specific to the company or from a company perspective. You can find lists of organizations in the Organizations button of the navigator. Each organization record has several fields that you can track information with; you can also associate numerous contacts to an organization and choose a role that best describes how that contact is related to the organization.

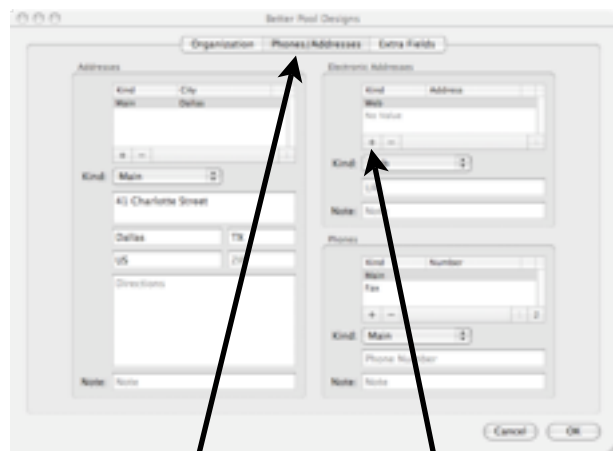
Objects linked to the Organization



You can keep track of an organization's name, type, ticker symbol, industry and region. You can also create as many phone number entries, electronic addresses(web, general emails) and geographical addresses for your organization. You can link these organizations to other contacts, projects, opportunities, tasks, appointments, and groups.



The Standard Window. Notice the Tabs across the top for extra data



Tabs to add more data

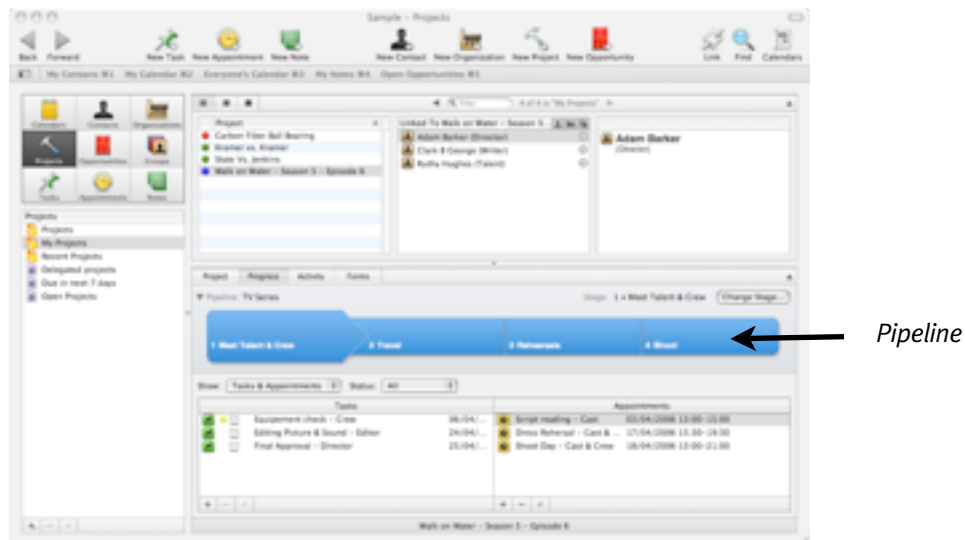
Add additional phones and addresses using these

Project View

In today's chaotic world, you need a mechanism that help you collect tasks, appointments, notes and related contacts into one logical unit. In Daylite this unit is a Project. It is a way to work with a few 'big chunks' instead thousands of little todo's (or tasks). Unlike professional project management tools, Daylite does not enforce rigidity. It tries to be as fluid as possible - just as you are.

When you create a task, you can create it independently or linked to one or more projects. The same holds true for an appointments and notes. You can also link files to a project and more importantly you can link people. When you link people you specify their role. For example, you can link a contact to a project and specify the role as 'Client'. Or if you prefer, you can link an organization as the 'Client'. This collection of information helps you focus on the big picture.

Another useful feature is 'Pipelines'. If you work in an environment where 'workflow' is key thought process, you can use pipeline to define that workflow and you 'flow' individual projects through a pipeline. You use 'stages' to define the major milestone or phases of that workflow. For example, if you are in product development, your stages could be: Planning, Design, Development, Quality Assurance, Release. Or if you are in Web development, your stages could be: Site Requirements, Design, Planning, Implementation, Testing, Client Acceptance. Each time you have a new product or a new web site to do, you create a project and flow it though the pipeline you defined.

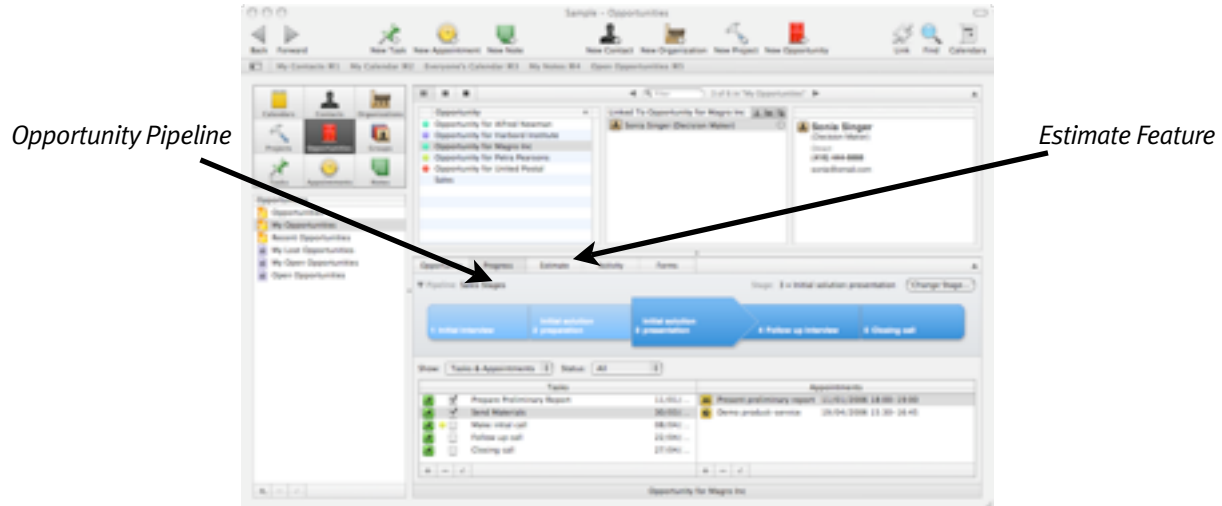


Multi-User & Workgroup Benefits

In a multi user environment, projects can be owned by different users and within the project, task, appointment, notes can be owner (assigned to) other users. So the project can be owned by 'Bob' and 10 tasks within the project can be owned by 'Mary', 2 appointments are owned by 'George' and 4 notes where created by 'Susan', yet all these 'things' are together in one unit - shared amongst the workgroup. The project owner can move the project along the pipeline as they see fit and everybody can easily determine the status by looking at the project - no more asking 'what's the status?'.

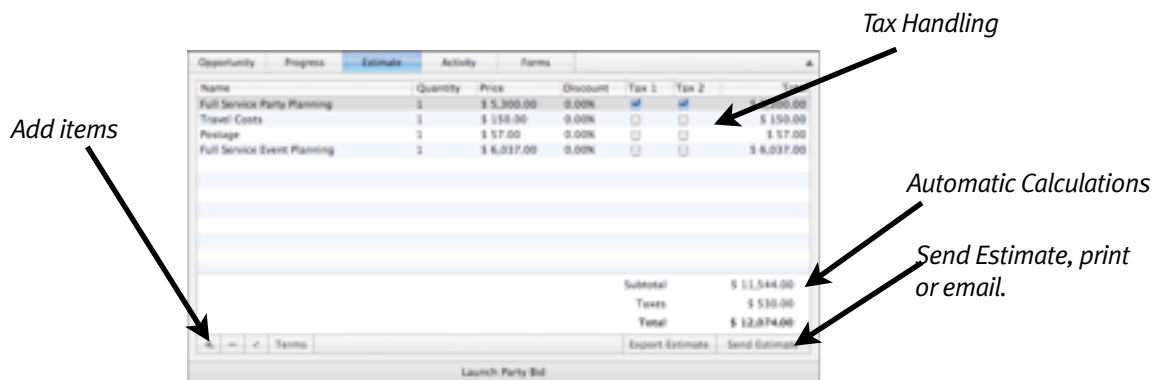
Opportunity View

Daylite provides a simple method to track business opportunities and forecast potential revenues -- an important task for any business. Contacts, tasks, and notes associated with an opportunity can be easily entered and tracked. Daylite helps you turn your prospects into clients by managing relationships and the process of 'making the deal' effectively and effortlessly. Powerful tools help identify new opportunities and manage them through the business cycle.



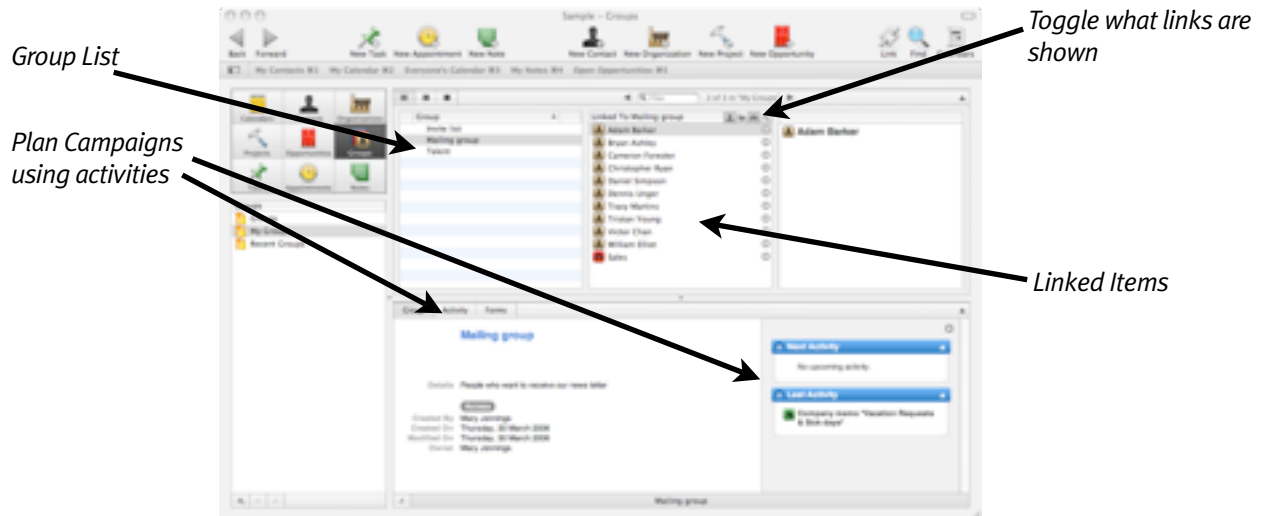
With Daylite you can generate and update custom-made pipelines that show at a glance workflow as well as progress in achieving tasks and objectives. For more information about pipeline, refer to the Project view.

Detailed estimates can be generated from within the application. Daylite gives users the ability to generate custom-made correspondence to reach out to prospects, follow-up on leads, and generate quotes and invoices.



Groups View

A group in Daylite is a collection of contacts, organizations, projects, opportunities and sub-groups that have something in common, as defined by the user. Groups offers a way of further linking people and companies outside of the traditional way of just looking at a company or other organization.



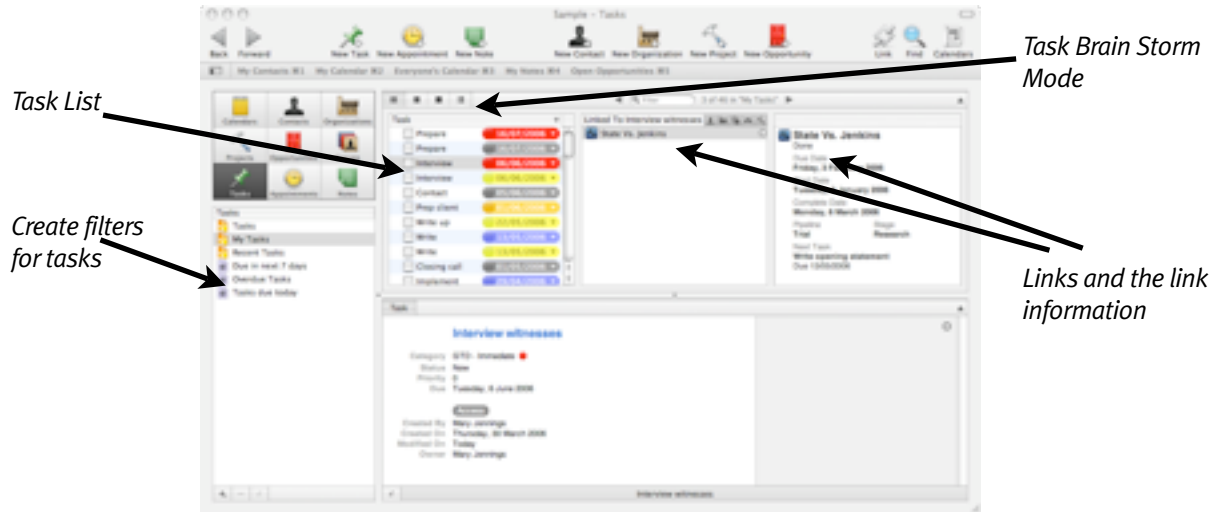
Groups are ideal for managing new business or marketing campaigns because you can track large number of contacts as you qualify them into solid prospective clients. You can also manage a marketing campaign through Groups. Having groups is also a useful tool for those bulk mail outs you might have that pertains to a specified group of contacts and organizations. For instance, if you have a group called mailing list, you can set reminders to send a message to the whole group.

A Group record stores a name, details, date range and a list of contacts and organizations linked to the group. Groups can have appointments and tasks associated with them. They can also have subgroups. You can create unlimited notes and forms for your group, as well as attach file and web references. You can also categorize your groups and add sub-groups.

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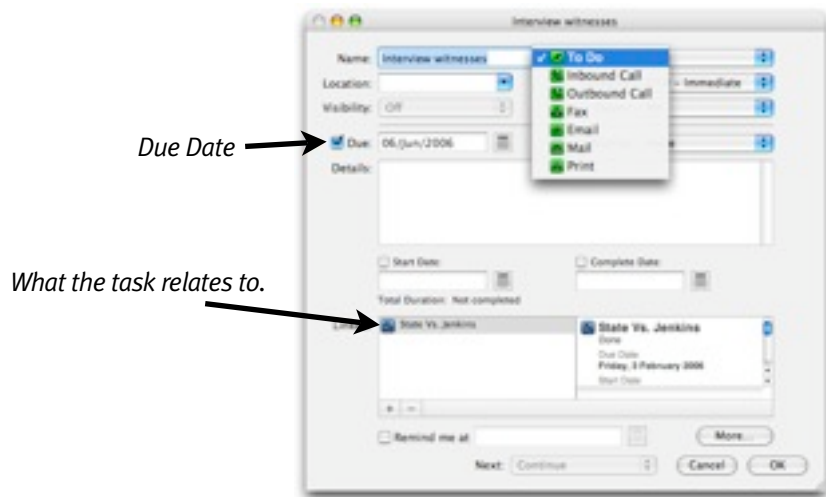
Task View

Tasks are “to-do” items that do not have a defined period of time attached to them. You assign due dates to Tasks, to be done on a certain day rather than at a certain time. For example, “A report that needs to be completed by Friday,” would be appropriate for a Task. Tasks include a priority level, the status, a start and due date, and details of the task. You can link contacts who may be involved or organizations that are involved. Tasks can also be linked to a group, opportunity or project as needed and can also be broken down into subtasks, for more complex situations. You can also set a reminder for Daylite to let you know when the Task is due.



In Daylite, tasks can be of several types:

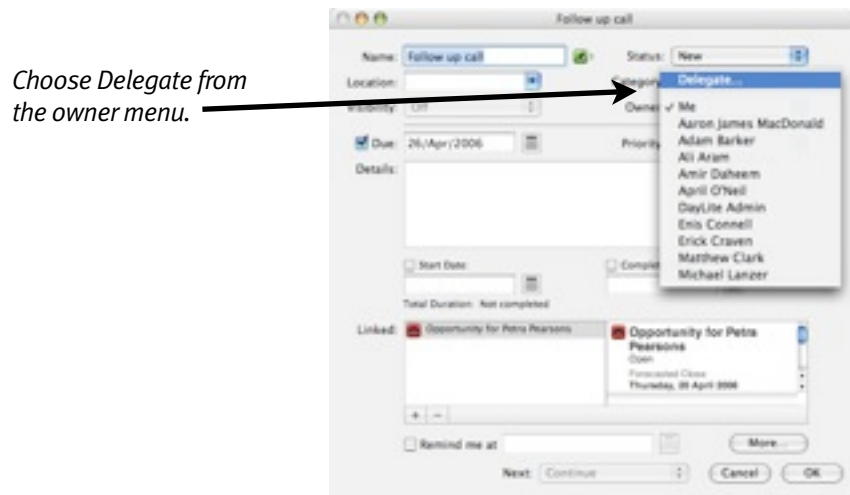
- To-do task
- Inbound and Outbound call
- Fax
- Email
- Mail
- Print



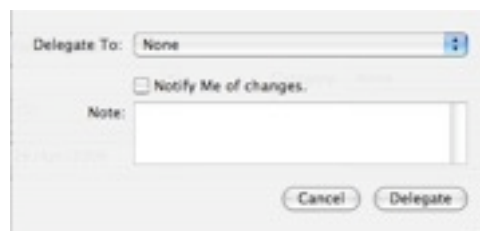
Tasks - Multi-user & Workgroup Benefits

Getting work done in today's fast-paced business environment requires constant delegation and sharing of workloads. Keeping track of who is doing what and when those tasks and activities are due can be a difficult and time-consuming proposition. Daylite can really help with it's delegation feature:

- 1) Because your database is shared real time you can see other user's tasks without them even having their computer turned on – This is because we use a central shared Database which can also be taken offline, so mobile workers have full access too. Create smart-lists to view other user's tasks or all uncompleted tasks regardless of user.
- 2) You can delegate tasks within the user base. With Daylite you can create a task or project and delegate it to any user in the database. The user who you delegated that task or project to gets automatic notification of the assignment. When that individual makes changes or updates to the project or task, you are immediately notified. You can also create smart-lists to display your delegated tasks that have not been completed.
- 3) To help you collaborate further, in Daylite a person can re-delegate a task or project that has been delegated to him/her. For instance CEO -> Team Leader -> Team Member. When the newly delegated person makes changes or updates to that project or task, you are notified, as is the person who you originally delegated it to.



Once you Delegate you can choose to be notified of changes, you can also give a message with the delegation by typing in the note field.

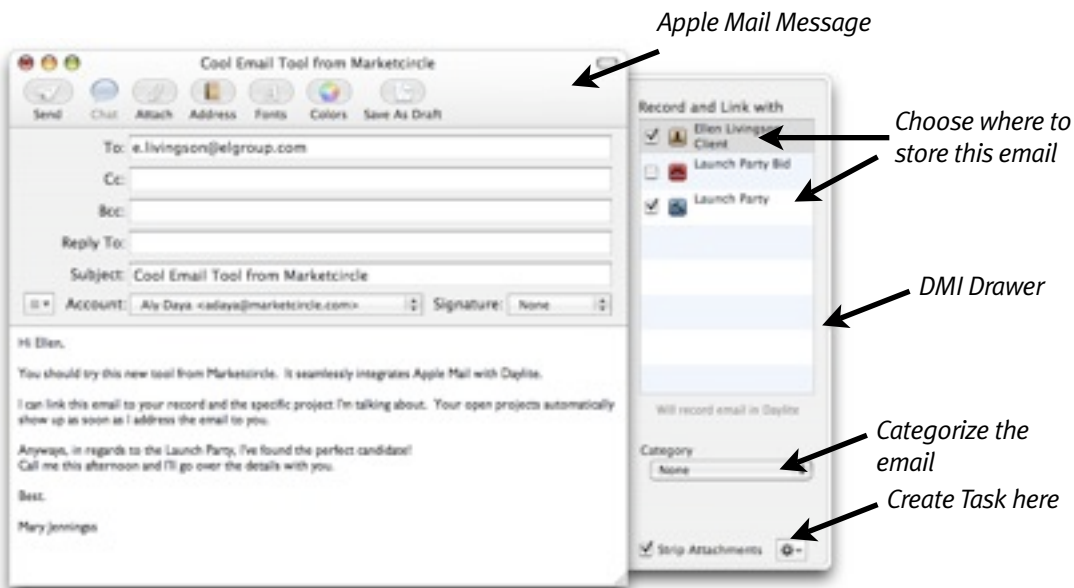


Notes View

Notes are brief records of fact that can be created on its own or linked to one of many Daylite objects. The Notes view provides a list of all the notes in the database. Think of them as Post It® Notes for your computer. You can create a note that is completely independent of any other objects in Daylite, which is perfect for those little bits of information that just don't fit anywhere, but can't be lost. You can also link Notes to other objects, attaching the full power of Daylite's linking and tracking capability to your small bits of information. You can use smart lists in notes to search for specific information. For instance, all notes between 2 dates that have the category 'Procedures' or a specific title can be searched. The Notes object provide the center piece on which Daylite's Mail Integration is based.

Daylite Mail Integration Module

With the Daylite Mail Integration Module (DMI), you are able to fully exploit the sophistication of Apple Mail with Daylite's powerful multi-user, multi-linking capabilities. From within Apple Mail you can add new contacts, create tasks with reminders, create new projects and opportunities, and automatically link and store the contents of one or more emails to contacts, projects and opportunities. The email contents are stored in Daylite's database and thus can be shared with your teammates.



With the Daylite interface integrated right within Apple Mail, you get a seamless environment for managing your projects. There is no need to switch applications to record and link inbound and outbound emails.

DMI does not 'point' to the email in Apple Mail, it actually stores the contents of the email in Daylite's powerful database — ensuring the historical value of the email is never lost and any one with the proper permissions on the local or remote network can view the contents of that email. Using DMI, you can merge a contact, opportunity or project with a Daylite letter template and insert that text directly into an email window, ready for emailing.

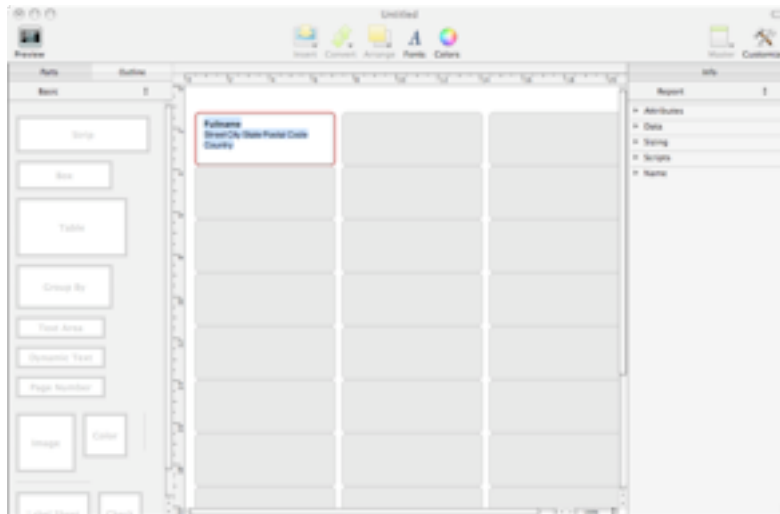
Appointments View

This view allows you to view appointments that appear on calendars in a list format. Appointments are used to identify a scheduled amount of time to complete an activity. They can be regular appointments, multi-day events or meetings that may be associated to specific contacts or organizations that are involved.

Appointments can also be linked to groups, opportunities or projects as needed, repeat and can have reminders set to notify you minutes, hours, or even days before the activity is due. Appointments can also be classified into different categories. The appointments view comes in handy for linking and editing many objects at the same time.

Report Writer

Daylite's new report writer offers access to all data in the Daylite database, allowing you to create customizable reports, envelopes, labels, and more using a drag-and-drop and inspector interface. You can mix "source list" criteria with raw SQL, basic scripting, and mathematical expressions to generate PDF output that meets your decision-making and business need. To learn more about this we have training movies on our web site. <http://www.marketcircle.com/help/movies.html>



Finding your information in Daylite - Quick Find

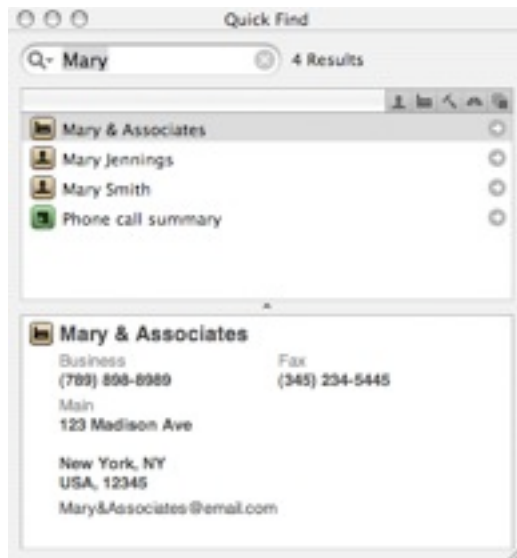
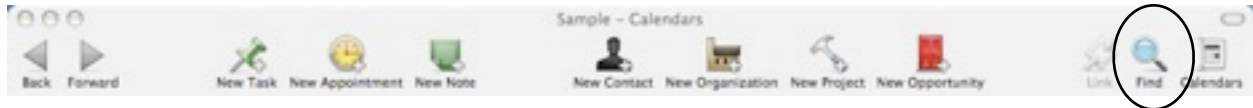
Quick Find searches the most common data quickly.

Choose Edit > Find > Quick Find.

or

Click the Find icon in the toolbar.

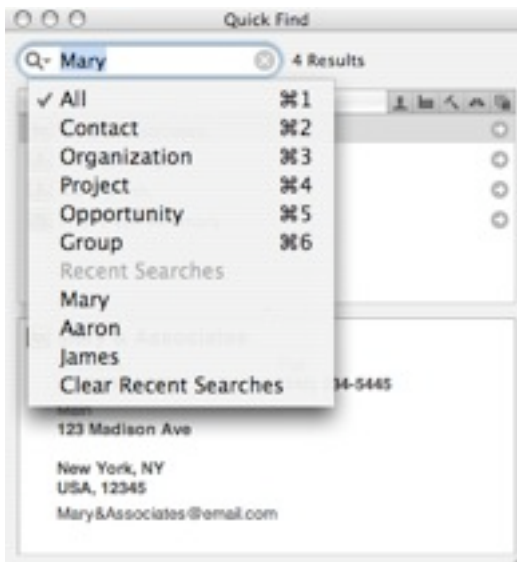
You can also use Apple - F or configure a global hot-key in the preferences



In the Quick Find window, enter the keyword for the item you want to search.

Daylite searches all the contacts, organizations, projects, opportunities, and groups in the database and returns items matching your keyword. If you select an object from the list, it shows a business card view of the selected object in the window below.

For every object, you can click the arrow pointing to the right. This takes you to that specific object in Daylite and opens it for editing. Within the list of objects, you can link different objects by dragging and dropping. For instance, you can link a contact with an organization or an opportunity with a project.



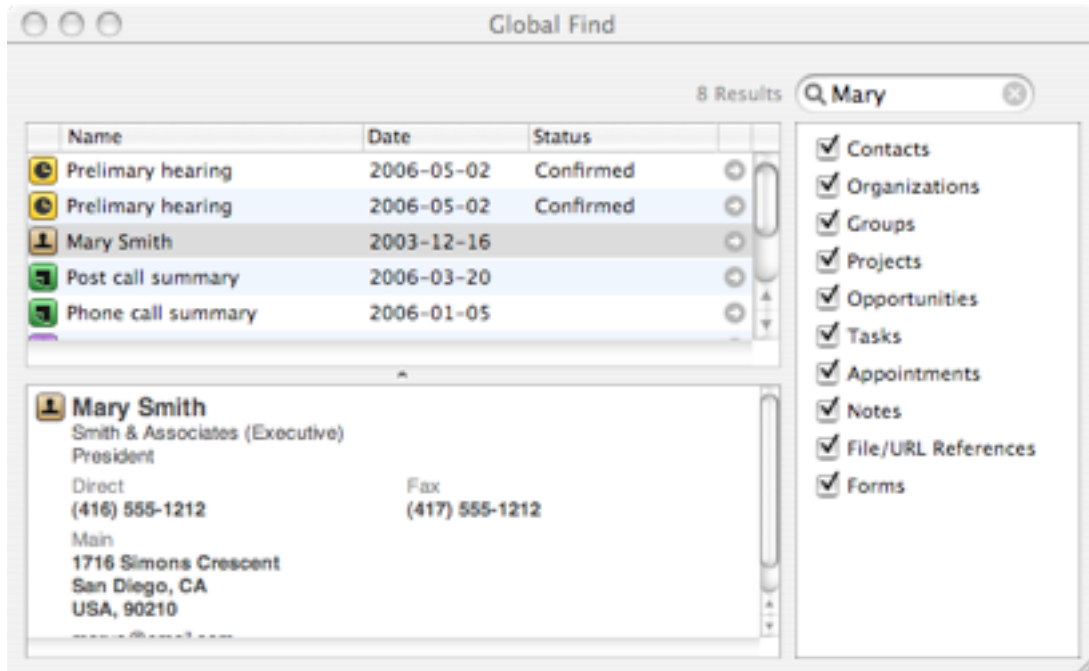
If you want to search for your keyword in a specific type of object (such as contact only / project only), you can specify that by selecting that particular object in the list as shown.

Finding your information in Daylite - Global Search

Global Search is slower but more thorough than Quick Find. It searches objects and fields that are not covered by Quick Find.

Choose Edit > Find > Global Search.

Enter the keyword of the item you want to search.



Daylite lists all the items that match your keyword and a brief summary of the selected object in the window below. If you click the arrow pointing to the right, it takes you to that specific object in Daylite.

Within the list of objects, you can link different objects by dragging and dropping. For instance, you can link a contact with an organization or an opportunity with a project. The right panel is useful in identifying your search criteria. You can enable specific items, so that a search is performed only in those categories. For example, if you want to search only in projects and opportunities, you can uncheck the rest of the boxes in the window shown above.

Daylite lists all the items that match your keyword and a brief summary of the selected object in the window below. If you click the arrow pointing to the right, it takes you to that specific object in Daylite.

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Daylite Applications Scenarios

Daylite is a productivity management software that helps an organization perform well in the fast modern business world. We provide the following six example usage scenarios to help illustrate the power and flexibility of Daylite in your business environment.

Keeping Track of Multiple Projects

Getting a snapshot of the status of your company's projects for review and action is an important part of keeping control of your business — allowing you to ensure all your resources are focused where you need them to be. Daylite offers multiple pipelining views for projects and opportunities, giving you a “whole company” snapshot of business activity.

With Daylite you can define any number of pipelines, each with stages. For example, you can define a pipeline to track projects with the following stages — Concept, Definition, Planning, Implementation, Close Out, and Review. At company meetings, all projects can be quickly reviewed against these stages of the pipeline for an overview of their status.

Daylite provides easy-to-view summaries of all the tasks, appointments, and notes associated with a project for easy monitoring of project history and next steps.

Scheduling Team Meetings and Resources

Finding a meeting time for team members and reserving meeting resources is easy in Daylite. Using Daylite's calendar, you can view the availability of people and resources and send meeting notifications to anyone on the system — booking appropriate rooms and meeting resources at the same time. When a meeting request is received, it can be accepted or rejected. Daylite automatically notifies you who has accepted or rejected your meeting invitation. If you change a meeting time or date, you can have Daylite automatically notify attendees.

Rule-based Calendaring

Many businesses (legal, real-estate, film makers, photography, etc.) have set steps that they have to follow. In real-estate, for example, closing the deal on a house involves several steps that must be observed — from doing a title search to delivering the keys to the new home owner. These steps are predictable and time-based.

Creating activity sets for these tasks and activities saves time and ensures that you don't forget a step in the process. Tasks and appointments can be created from a defined date going forwards or backwards — allowing you to set milestones automatically, based on a known fixed date. Additionally, you can set up activity sets to skip days that shouldn't be included in the project timeline, such as weekends or holidays.

Once an activity set is defined it can be applied to any number of projects or opportunities with just the click of the mouse — saving valuable time and ensuring critical tasks and activities are not missed.

Tracking New Business

Keeping track of and managing new business opportunities is the lifeline of most companies. Daylite allows you to efficiently manage your business development cycle — keeping track of important activities, tasks, and notes associated with an account.

In Daylite “opportunities” are created to track new business prospects. With that opportunity, business contact information is recorded and roles can be assigned (decision maker, influencer, etc.). All contacts are easily linked to new opportunities in Daylite — allowing you to see the business landscape you are working in.

Once you have created your opportunity it can be linked to a defined business development pipeline, allowing you to track progress in the business development cycle. Potential earnings can be recorded against an opportunity and client estimates can be quickly created using Daylite’s report writer. When a decision is made by the potential client to buy your product or use your services, important “win/loss” information about can be recorded for future reference.

If new business results from the opportunity, a project or multiple projects can be easily created, with associated tasks, activities, appointments, contacts, files and notes.

Customer Support

Most small companies cannot afford the money or overhead for a full customer support application. The combination of Daylite and the Daylite Mail Integration (DMI) module fills this support gap.

Many companies use email as a first line of support. With Daylite and DMI, when you receive a support question via email you can see right within Apple Mail whether or not that person is a current contact in Daylite. With a click of the mouse you can see any projects or opportunities that are associated with that contact, along with project and opportunity history.

From within Mail you can attach and send pre-written responses to queries, respond directly and record your response in the Daylite database, or highlight the content of the mail and create and delegate a new project to address the query.

As a manager you can easily monitor all customer support issues by creating a smart-list to search the database — reporting on the status of open and closed support cases. Because Daylite allows you to create rich histories for all opportunities, projects, tasks and activities, you have all the information you need to determine the status of a support case, right at your fingertips.

Learning more about Daylite and Getting Help

Daylite is a powerful application and it can help you and your business reach new levels. There is some learning to do but the rewards are great. We're continually working to improve the Daylite knowledge. Here are some recommendations:

1. Watch some of the tutorial movies we've made - located at: <http://www.marketcircle.com/help/movies.html>
2. Download the Daylite Manual if you don't already have it <http://www.marketcircle.com/help/manual.html>
3. Consult the online knowledge for troubleshooting help at <http://www.marketcircle.com/kb/>
4. Join the online community at <http://forums.marketcircle.com> and ask questions or search the many existing topics
5. Establish a relationship with a Daylite Partner. We have over 200 partners throughout the World. They can help with various aspects including setup, training, custom reports and more. Find them at this page: <http://www.marketcircle.com/community/>