

Daylite

Make your business more productive.

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Daylite 101

Houston, Texas • September 16 - 17

Package Price: \$595
Optional Lodging (2 nights): \$400



Course Outline

Lesson 1: Daylite Concepts

Lesson 2: Overview of the Interface

Lesson 3: Creating Contacts and 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 & Filtering

- 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 & 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 Follow up Tasks
- Delegating Tasks

Lesson 13: Generating Page Layouts & Reports

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