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Daylite

[Have a question for us?](#)

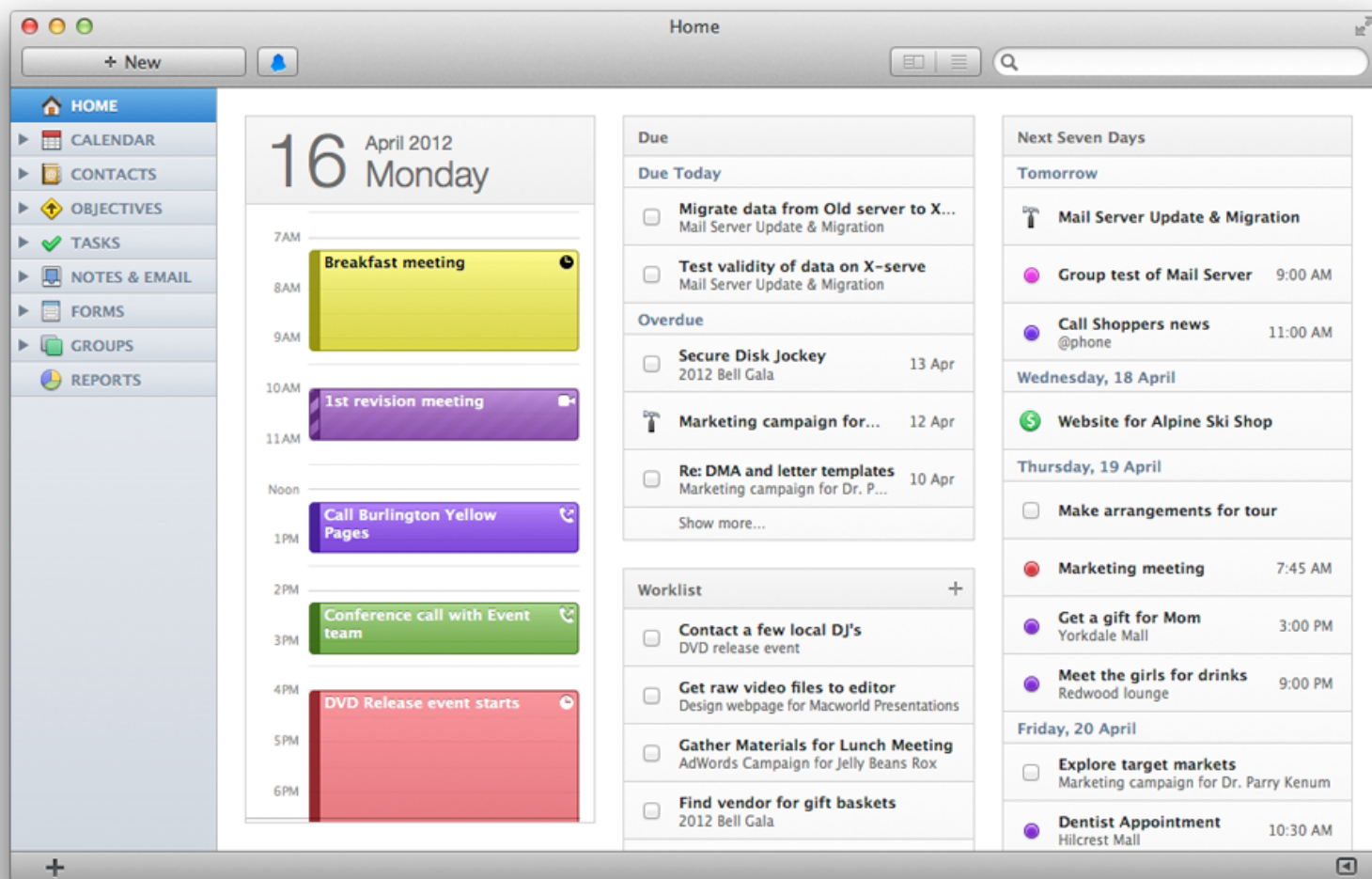
Businesses grow better with Daylite.

On Mac, iPhone, & iPad.



Organize your whole business in one app.

Projects, sales, emails, meetings, calendars, contacts, notes, and more.



Daylite keeps everything related to your business in one place. This makes it easy to find things, easy to add new things, and easy for everyone you work with to be on the same page.

Know what's on your plate.

Daylite's home screen allows you to quickly see your schedule for today as well as any tasks due today. Or glance at the tasks you've added to your Worklist.


Know what's on the horizon.

Easily see tasks or projects that have due dates, or sales opportunities forecasted to close in the upcoming week.


[Learn more](#)

Everything you've ever done with someone.

Every call, email, appointment, note, and more — all on one page.



Sara Stone
 Jelly Beans Rox Owner

category  Lead

Direct (416) 555-1234
 Fax (416) 555-2687
 Work sarastone@email.com
 Main 123 Apple Crescent
 Toronto ON L3R 7G2
 Canada

companies Jelly Beans Rox Owner

opportunities AdWords Campaign for Je... Writer


people was referred by Adrian Lee

groups Invitees Table 2




permissions Public
 owner Mary Jennings

All Activity

FUTURE

- ☐ Call Sara for approval
-  **Meet for Lunch** 19 Jul, 2012 12:00 PM
Meet for lunch with Anna (try to keep it casual).

PAST

-  **re: Your Cell Number** 28 Jan, 2011 3:31 PM
Mary Jennings <mary@sundancemediainc.ca>
Hi Sara,
When you have a moment, can you email me your cell phone number?
[Read more](#)
-  **Jelly Beans Rox** 28 Jan, 2011
Owner
-  **AdWords Campaign for Jelly Beans Rox** 10 Dec, 2010
Writer
Due Date 10 Mar, 2012

Mac

iPhone

iPad

History, at the flick of your finger.

Track every call, email, note or meeting you've had with someone. See if they have changed roles or moved to a different company. Review previous quotes or past projects you've worked on together.

Much more than a CRM.

Daylite doesn't just help you manage relationships, it helps you build meaningful ones. Remember who you need to follow up with, the promises you've made, and who you haven't spoken to in a while.

Easy to follow up with customers.

Create sets of common activities you do, add them to a contact and never forget to follow up. It's easy to contact a bunch of people at the same time too – create letter templates right in Daylite using Pages or Word. You can even export a group of people to use with an email marketing tool like Direct Mail or MailChimp.

[Learn more](#)

Stay on top of your schedule.

See what's coming up — today, tomorrow, and for the next seven days.



Who, what, where, when, and why.

An appointment is about more than a block of time — it's about who you're meeting with, where you're meeting, and what you're meeting about. Since you can link appointments to projects, sales opportunities, tasks, and emails, you'll know why, too.

Your work and personal life — in one calendar.

Subscribe to iCloud, Google and other calendars to view your personal schedule alongside your work so you can balance your work and personal life.

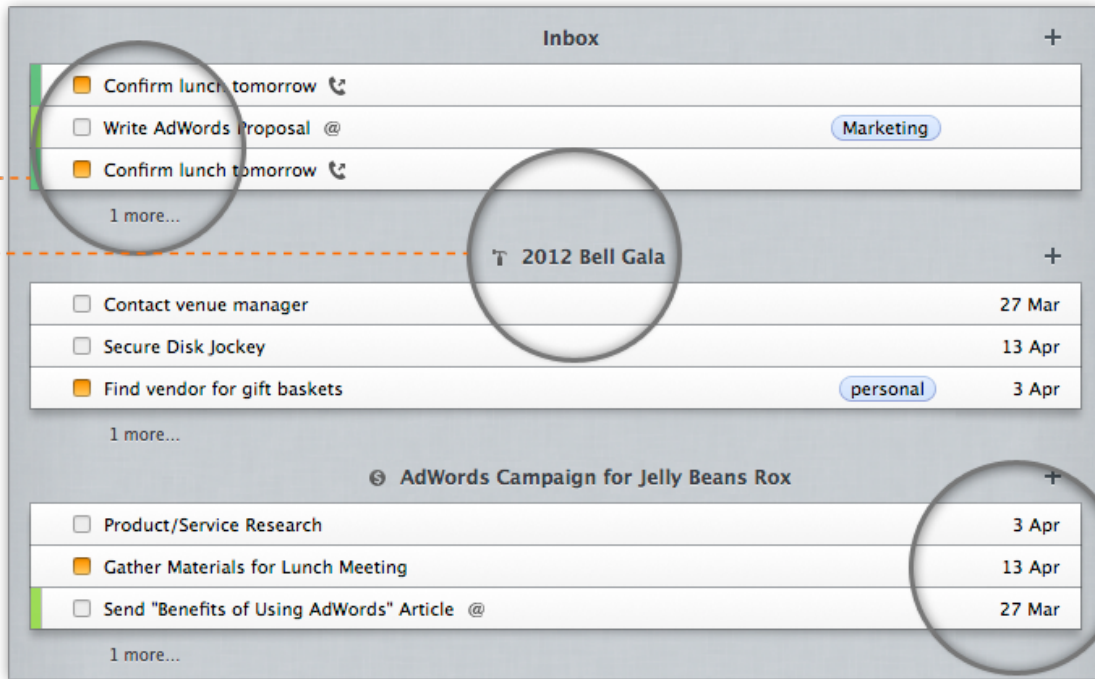
[Learn more](#)

A smarter way to tackle tasks.

Find everything you need to do, then focus and finish.

Focus on a few tasks at a time

Tasks, grouped by project or sale



Mac

iPhone

iPad

Add.

Use global hotkeys to quickly create tasks whatever you're doing. If you're on the go, quickly add a task to Daylite with Siri.

Focus.

Choose the tasks that you want to focus on and put them in your Worklist.

Find.

View a list of every task that's not done — grouped together in a way that makes sense.

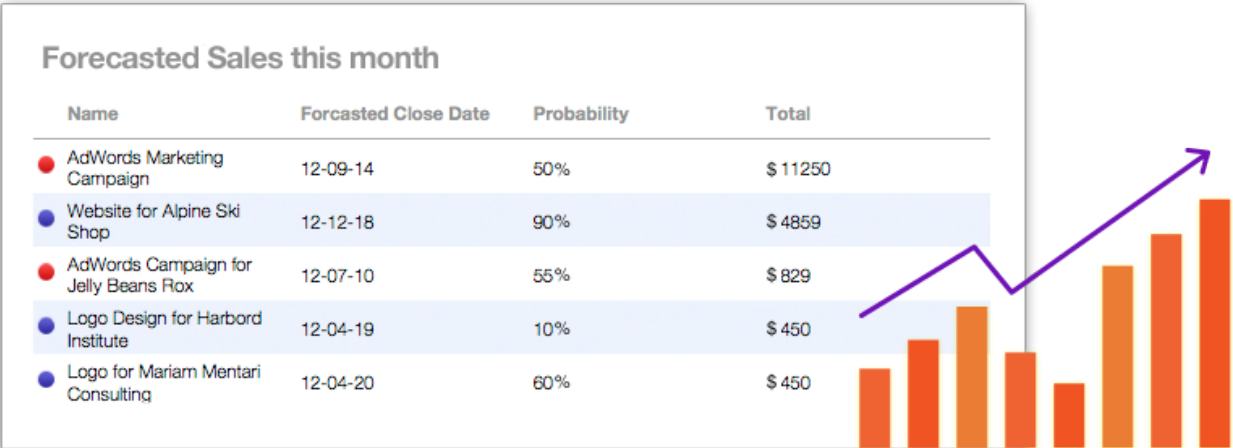
Finish.

Order your tasks according to priority, then get things done.

[Learn more](#)

Go after new business

GO AFTER NEW BUSINESS.
Track leads, customers, and business opportunities.



Know your deals.

Daylite shows you everything you need to know about the deals you're working on – the dollar value, stage in the pipeline, probability of closing, who's working on it and next steps.

Focus on your biggest opportunities.

Daylite makes it easy to focus on your largest deals and ones that are near the close.

NameSales follow up

DescriptionTemplate for sales follow-up activities.

Active☒

Applies to

☐ People

☐ Companies

☐ Groups

☒ Opportunities

☐ Projects

Sales follow up

Initial Consultation

on start day

Gather and send over requested information

on start day

Sales Presentations

3 days after start

Send over proposal

3 days after start

Follow-up Call (Review Proposal)

10 days after start

Closing Call

11 days after start

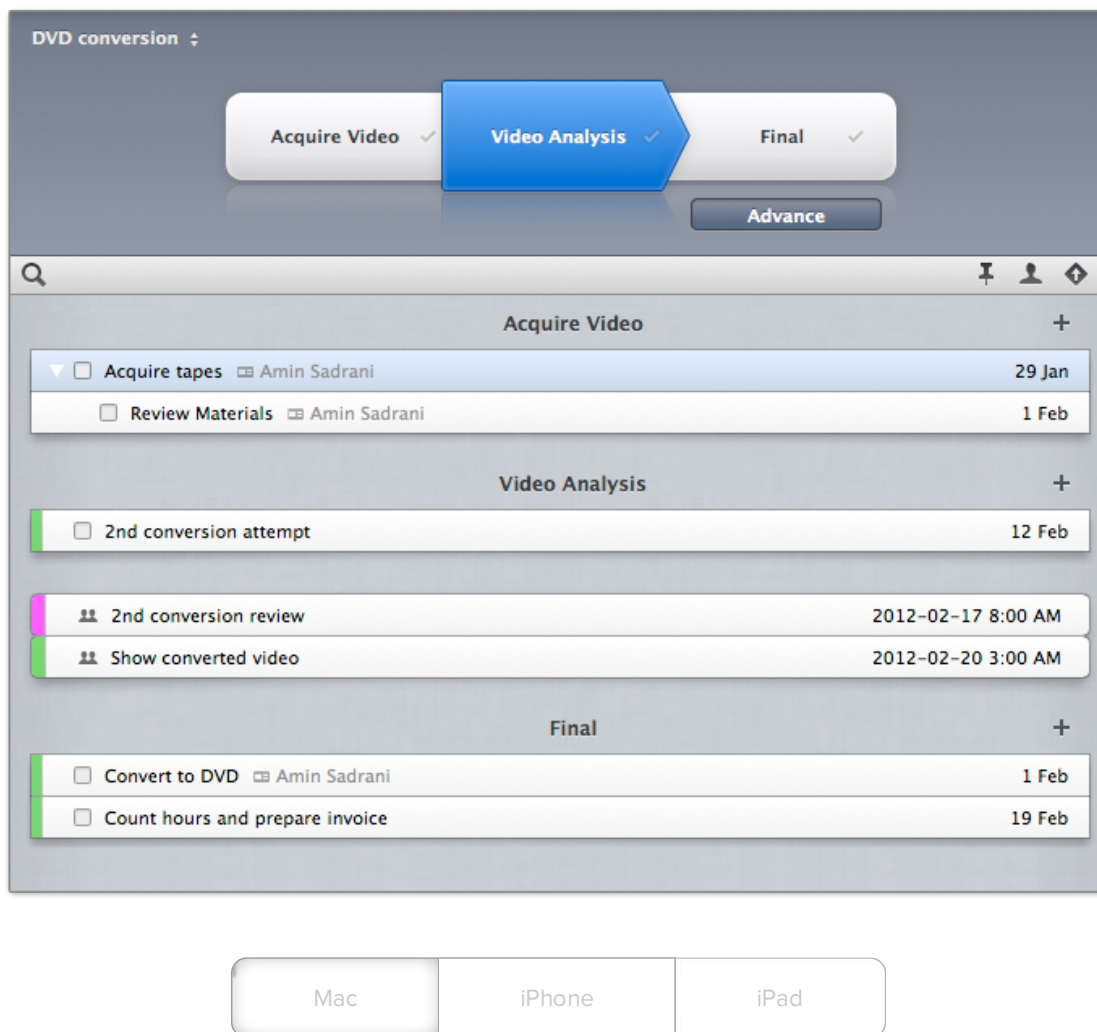
Easy follow-ups.

Create an automatic follow-up schedule with Activity Sets to remind you to follow-up with prospects and leads to push deals forward.

[Learn more](#)

Track projects.

Stay on track and deliver on time.



See the whole picture.

Appointments, meetings, notes, tasks, and emails are all available in one place, making it easy for you and your team to see what's happening at anytime.

Spend your time working not planning

Projects are simple in Daylite — collect everything you need to work on, then organize, delegate, and do.

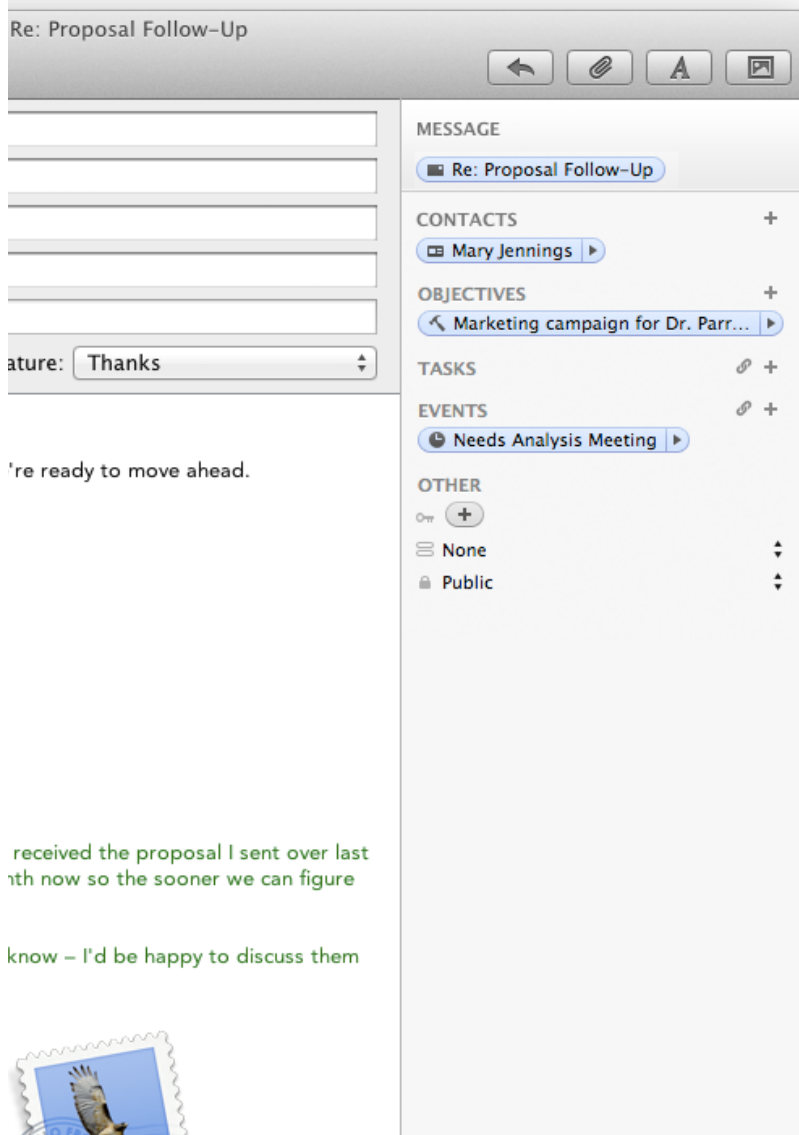
Stay on track.

Track the progress of your projects by viewing the pipeline to see what tasks still need to be done. You'll also be notified of the changes that happen along the way.

[Learn more](#)

Daylite Mail Assistant.

Store, review, and take action on your email.



Store relevant emails in Daylite.

This lets you or anyone else in your team quickly look up every communication linked to a person or objective.

Quickly see the history.

Easily jump to a contact's entire history by clicking their name.

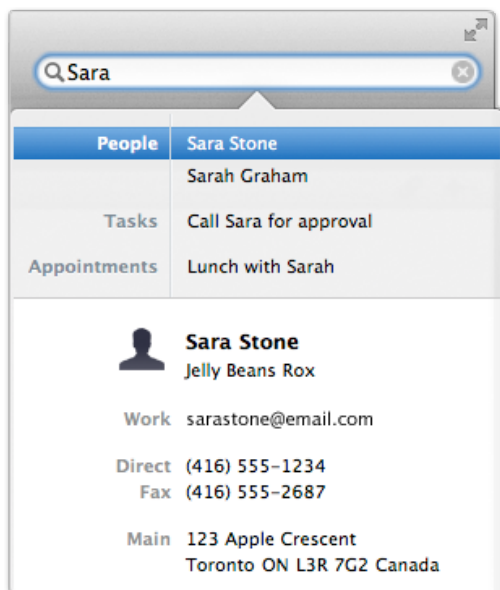
Work right from Apple Mail.

Create a follow-up task or a new business opportunity, right from the corresponding email.

[Learn more](#)

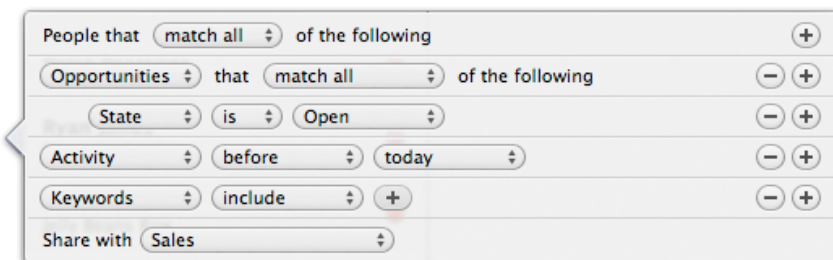
Find exactly what you're looking for.

Search results in seconds.



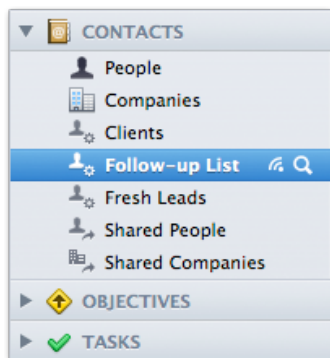
Search.

Find what you're looking for with the convenient Quick Search. Daylite shows you results organized by category, updated live, as you type.



Filter.

Quickly filter any list to show similar items – people who work in a certain industry, prospects you haven't spoken to in 30 days, or all the marketing managers you know.



Save.

If you're filtering for something often, save it as a Smart List and it'll always be just a click away. Smart Lists update automatically — no need to worry about keeping a list up-to-date.

Share.

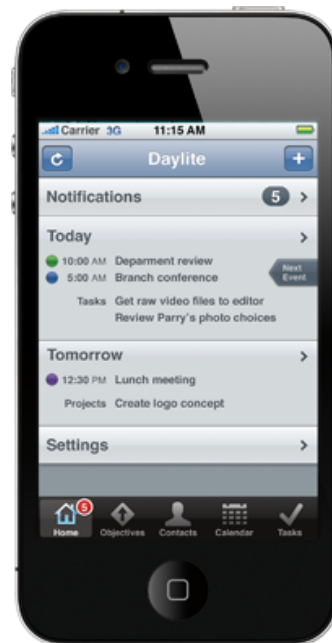
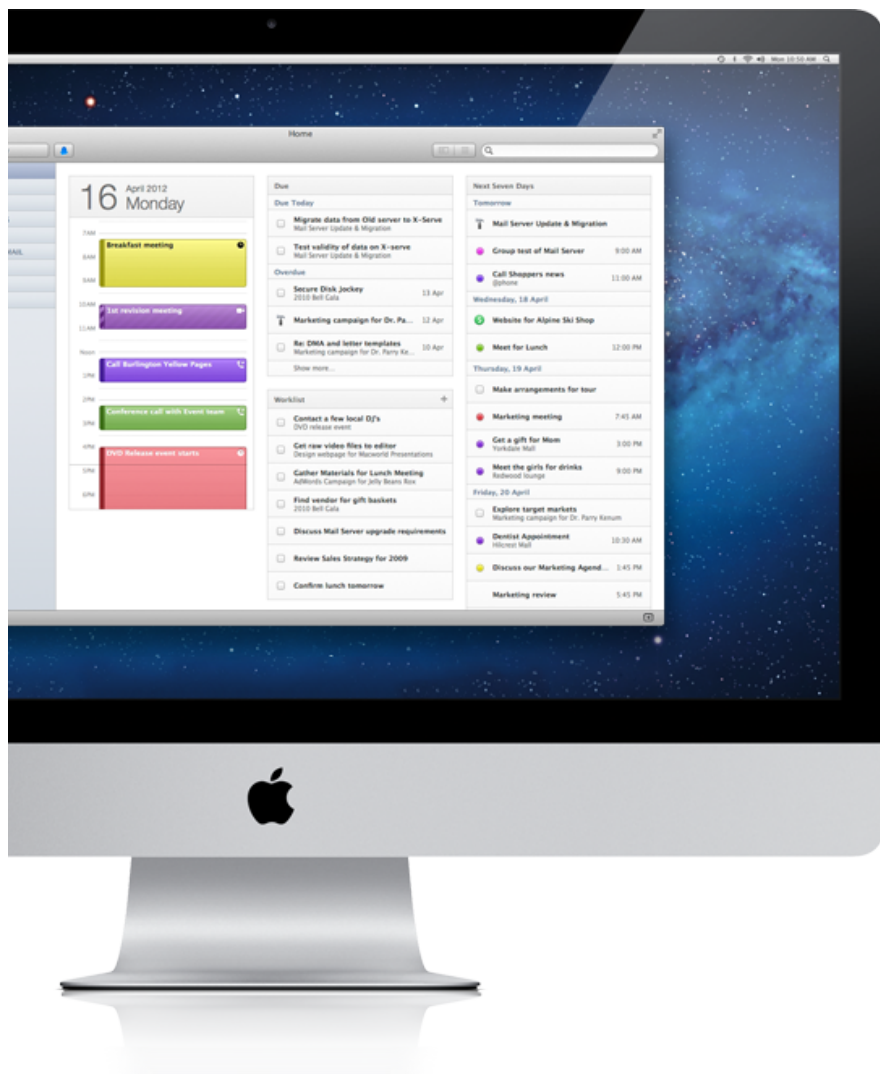
Share Smart Lists with your team so that your whole team can use it.

[Learn more](#)

On your desk, in your pocket, and at your fingertips.

You'll have your business with you wherever you go with Daylite on your Mac,
iPhone, and iPad.

iPhone, and iPad.

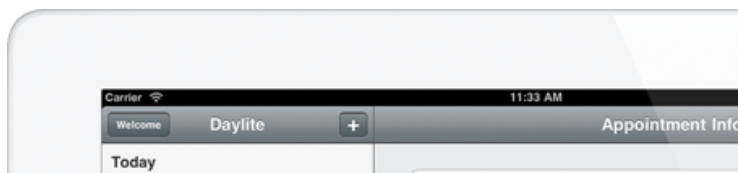


On your desk.

Daylite for Mac is completely brand new. We rebuilt the app from the ground up so you can work faster and more efficiently. We've also applied what we learned building iPhone and iPad apps and added it to the Mac — like Daylite's Home Screen. With new features like Slideovers and Tabs, you can get more done in less clicks.

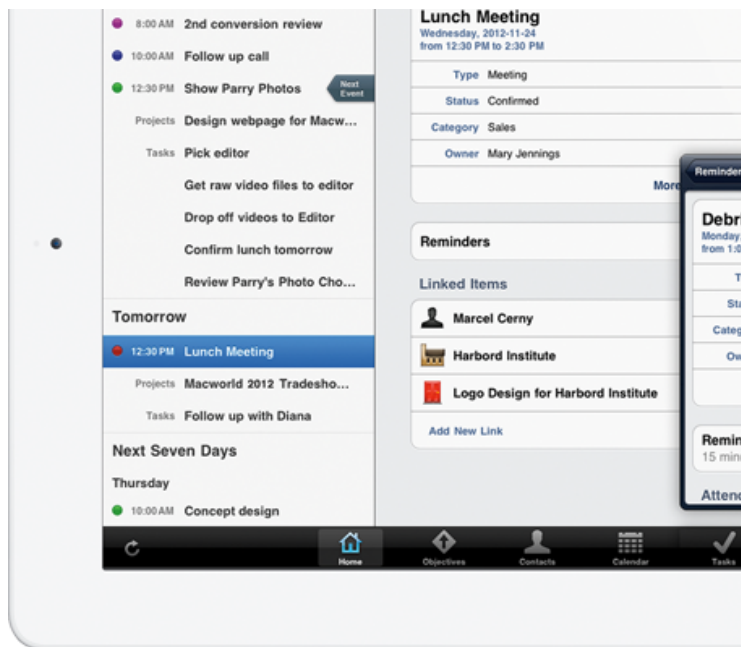
In your pocket.

Daylite for iPhone puts your business in your pocket. Access all your critical business information on the go. Invite employees to meetings, delegate tasks, check the progress of projects, hand off a new sales lead, or review a client's history right before meeting them.



At your fingertips.

Daylite for iPad lets you experience Daylite with a large screen whenever you're away from the office. Great for taking notes or reviewing details before stepping into a meeting or moving business forward while on the road. For those times when a laptop is too much and an iPhone too little, Daylite for iPad fits perfectly.



[Learn more](#)

Use it in almost any industry.

So flexible it works for lawyers, consultants, photographers, mortgage brokers, flame throwers, and more!





Super flexible.

Every business has similar needs, but not every business achieves them the same way. Daylite doesn't handcuff you to one particular way of working — you decide how much to use, and how to use it.

Easy to customize.

With just a little bit of thought you can customize Daylite to meet your specific needs. Define categories, keywords, roles and relationships, and colour-code things in a way that's meaningful to you.

[Learn more](#)

Grow your business with Daylite.
Take the tour or [talk to one of us](#)

TOUR

DOWNLOAD
TRY SELF-SERVE

BUY NOW



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