

# Real Estate DayLite

## - some thoughts -

The following describes a series of ideas that can be useful for the use of DayLite in Real Estate. In no way do these ideas constitute a recommendation or advice. Each situation is unique and must accordingly lead to unique solutions.

# Opportunities and Stages

- selling property
- buying something
- linked together
- customize stages to fit pipeline

# Pictures

- in “Other”
- as reference

# Customize Forms

- Phone Usable
- use fields to capture specifics
- can create different forms
- link to opportunity, person and desired groups
- Ex: net worth, funds, earning reqs., confidentiality etc..

# Communications

- Envelopes
- Labels
- Merged Documents
- Merged PDFs (OmniGraffle)
- Personalized batch-emails (MailDrop)

# Closed Deals

- Merged Letters
- Picture
- Form

# Showings

- Timeblock/Task
- Link to Opportunity, Seller, Buyer, Group(s)  
etc...

# Contacts

- Contacts/Organizations traditional
- Import / Export

# Categories Example

- contacts/organizations relationship to you
- activities for task (prospecting, marketing, networking etc..)

# Prioritize

- Color Coding
- Column Views
- Matching

# Sales Track

- Opportunities
- Timeblocks setup

# Keywords

- Areas of interest
- Specifics

# Opportunities View

- Data for both sides
- Easy Access
- Easy Follow-up

# Groups

- Target Specific
- Mass email (and/or fax using <fax##>@efaxsend.com )