

Getting Results with D-Tools Software

...a 30-day plan for success!

Overview

Getting started with the D-Tools SI platform can feel overwhelming; but it does not have to be. The first step is to get SI installed ([Install SI 2016](#)). Next, begin getting familiar with the platform by reviewing our [Getting Started](#) videos (seven short videos totaling about 40 min). After this, by completing four, one-week implementation checklists, you can start seeing positive, tangible results using SI in your business. Here are the four weeks in summary:

1. [Build a Solid Foundation](#) - Gather and input company and product data.
2. [Build a Project](#) – You can start by re-creating an existing bid using SI.
3. [Make Your Data Work Harder](#) – Take control of your data, gaining efficiency through accessories and packages.
4. [Assemble Project Documentation Packages](#) - Leverage project data to assemble proposal and design packages that include drawings.

The checklist for each week is designed to be completed with a minimum investment of 10 hours.

Week One – Build a Solid Foundation

The SI platform is a data driven application that can help you create and win bids, create documentation, run reports, purchase equipment, and manage installations, among other features. This is all possible by building a solid foundation of company information and product data. Week one is divided into two sections: company information and product information.

Company Information

- [Enter Company Information](#) from the [Control Panel](#)
- [Create users with permissions/roles](#)
 1. List personnel by role with name and email
 2. Create user groups (optional at this point)
 3. Create users and assign to groups
- [Define project labor phases](#)
 1. List labor rates charged by role/phase including labor cost
 2. Use standard SI phases for products (Rough-in, Trim, Finish). These phases will automatically be assigned to products added from the online library
 3. Use additional labor phases for specialized labor to be added as line items

4. Add management labor factors to standard phases to capture project management or design labor as a function of base labor

Product Information

Limiting your catalog to the products you sell and install is one of the cornerstones of success with our application. Here is a Pro Tip for your catalog: we recommend applying the 80/20 rule. We estimate that 80% of your projects will only use about 20% of the products available to you (or less). That 20% should be the focus of initial catalog deployment (hopefully a few hundred items, not thousands of items). Another key concept is to understand that you do not need to build a perfect catalog to start working with SI. You can continue to build your catalog as you continue to work with the platform. Next up, we will provide you with the basics of building your catalog. Later we will build upon this core data and refine it as we move through the implementation program. Before you begin, take a tour of the [Catalog](#).

Several techniques are available for [adding products to your catalog](#). There are two methods that will allow you to work quickly. You can start from a simple spreadsheet of product information and import it or download products directly from the D-Tools Library. Either way, start with a list of your top 5-10 manufacturers by volume and gather price sheets.

- [Add From Library](#) – this is a great way to download data directly from D-Tools. We recommend that you work from a list of products you actually sell to avoid the temptation to arbitrarily download all products from a manufacturer.
 1. From the D-Tools Library you can search Manufacturers and then categories. Choose products and click download. It is that simple.
 2. Now you need to add price information. We will present two methods of achieving this.
 - a. Many products downloaded from the D-Tools Library are provided with MSRP. With this information you can apply [Price Rules](#) to calculate Unit Cost and Unit Price. Be sure to verify the MSRP from the Library against your own price information.
 - b. You can also [Export Products](#) in CSV format, edit the price information and import back to the catalog.
- [Importing Products](#) – this method starts with a list of products that you import before updating from the Library.

1. Gather product lists and price sheets that you have available

2. Pro Tip: Creating Products in two steps

- a. Start by creating a simple spreadsheet containing the manufacturer name, model, cost and price of your key products (cost/price data not shown in example).

	A	B	C	D
1	Manufacturer	Model	Cost	Price
2	Sonance	VP86R		
3	Sonance	LARGE ROUND FLEX BRACKET		
4	Sonance	SUB 10-150		
5	Sonance	SUB 12-250		
6	Middle Atlantic	MRK-4426-AV-AB		
7	Middle Atlantic	MW-10FT-FC		
8	Middle Atlantic	PDT-2020C-NS		
9	Integra	DRX-3		
10	Integra	DRX-4		

- b. Now follow the [Importing Products](#) instructions.
 - c. Next, update these products from the D-Tools Library. This will fill in additional data fields for products found in the library. Just click Start → Catalog → Manage Products and then choose “Update from Library”.
 - d. After updating from the Library, some items may still show Category as “Unassigned”. These items did not match with Library items. Try searching the Library directly for these items. Items can be updated manually as well. Consider using [Mass Update](#) tools to assist you. Reasons for non-matching items include:
 - i. Manufacturer name does not match the Library (Middle Atlantic vs. Middle Atlantic Products)
 - ii. Model does not match. This is common with color dependent items.
 - iii. New items may not have been added to the Library yet.
3. Apply labor by phase to products in catalog as a baseline. Products downloaded or updated from the library will likely have a phase and labor hours assigned.
4. At this stage, all products in your catalog should include a minimum set of data to be proposal ready. Each product needs:
- | | |
|------------------------|----------------|
| a. Manufacturer | e. Cost |
| b. Model | f. Price |
| c. Category | g. Phase |
| d. Description (Short) | h. Labor Hours |
5. [Catalog Accessories](#) – one of the many time-saving features of the platform is the ability to add accessories to any product. Accessories allow you to link a product with the typical installation components it needs. Examples of this could be a security sensor with the wiring needed to connect it, or a blu-ray player accessorized with an HDMI cable, network patch cable, and a rack mount kit. Many scenarios exist where accessorizing products will save you time and help you build a complete BOM with less effort. In week three we will cover accessories in detail. Check it out here.

Week Two – Building a Project

After completing the setup of your company information and starting your catalog with key products (remember the 80/20 rule), you are now ready to start working with projects. A great way to get started is to re-create a bid for a small project that you previously assembled outside of SI. Working with a familiar project will help you get fast results.

[Create a New Project](#)

1. In the “New Project Wizard” the minimum required fields are Client and Project Name.
 - a. Complete as much or as little information from within the wizard as you like. All settings are available inside the project editor.
 - b. When you are ready to move on, click “Save” and the project will open in the Project Editor.

2. Now you are in the Project Editor. Take a tour before you begin ([Project Editor](#)).
3. Now that you are familiar with the interface, choose the Settings tab.
 - a. Start by adding/creating Locations
 - i. [Locations Defined](#)
 - ii. [Managing Locations](#)
 - b. Now add/create Systems
 - i. [Understanding Systems](#) (see page 30)
 - ii. [Managing Systems](#)
 - c. Check your tax settings
 - i. [Managing Taxes](#)
 - d. Consider adding a Miscellaneous Parts allowance
 - i. [Managing Price Adjustments](#)
 - e. Continue to adjust any settings that are appropriate for your project
 - i. [Overview of Settings Tab](#)
4. Begin adding Products to your project.
 - a. First select a location and a system from the list on the right side of the project editor, called the [Drop Zone](#).
 - b. On the left side, begin choosing products or packages from the Product Explorer or Package Explorer located along the edge of the window. Select “Add to Project” from the bottom of either Explorer and the products or packages will be added to the project and assigned to the selected location and system.
 - c. Continue adding products and packages until your systems are complete.
5. Save your project by clicking on the disk icon  found in the upper left corner of the Project Editor. Consider adjusting your Auto Save settings (Settings → Project Settings → General).
6. Let’s take a look at how our project is coming together so far. In the project editor we have some options for viewing project data to assist with analysis.
 - a. Analysis by view
 - i. From the Home tab, select View → Summary → Phase. This view allows you to see an installed price by phase, products and labor, cost and price, margin and installation hours.
 - ii. Look deeper into a phase by clicking a phase name.
 - iii. On the View menu, click Return to go back to the Phase summary.
 - b. To return to your original view, choose View → Item → Items.
 - c. From any view where the Item Validation column is present  you can hover over the icon to see validation errors (Zero Cost, Zero Price, etc.) Clicking on the icon opens the item for editing so you can fix the problem(s). For a list of validation settings click Settings → Item Validation Settings.
7. Now let’s run some reports against your project data.
 - a. From the Reports tab, under Quick Reports, choose “Project Summary”. This report provides a snapshot of your project. From top to bottom it includes:

- i. Product price with Adjustments.
 - ii. Labor by Phase with hours and dollars.
 - iii. Summary including sales tax.
 - iv. Profit Analysis
 - b. Now run the Quick Proposal under Quick Reports. This is the default option for generating a proposal report and uses the standard report called "Proposal".
 - c. Many useful reports exist. In the short-term, finding a proposal report that you are confident in presenting to customers is the most important.
 - i. Under Reports, choose "Client" and take a look at your options.
 - ii. Some popular choices include:
 - 1. Proposal With Images
 - 2. Proposal With Images (Equipment and Labor Price)
 - 3. Proposal With Images (Installed Price)
 - 4. Proposal (Equipment and Labor Price)
 - 5. Proposal (Installed Price)
 - d. For a closer look at options while running reports, see [Running Reports](#).
- 8. For a complete walk-through of projects and reports, see the [Proposals](#) and [Reports](#) chapters in our training manual.

Week Three – Make Your Data Work Harder

Now that you have familiarized yourself with some of the project workflow and basic reporting features, it is time to re-visit your initial core dataset and make use of product accessories and packages. As we touched on in week one, accessories allow you to link a product with the typical installation components it needs. Examples of this could be a security sensor with the wiring needed to connect it, or a blu-ray player accessorized with an HDMI cable, network patch cable, and a rack mount kit. Many scenarios exist where accessorizing products will save you time and help you build a complete BOM with less effort. Packages are similar but allow you to group multiple products with or without accessories and give them a name and description as a group. A security package including a control panel, keypad, siren and cabling is one example. A wall plate for data connections is another example. This might include the bulk wire, cable terminations, and parts to trim the plate, along with associated labor.

- [Accessorize products in your Catalog](#)
 - 1. Create a list of accessory frameworks. This is a standard set of accessories to apply to products by category (video sources, amplifiers, control processors, etc.)
 - 2. Apply the accessory framework to products by category.
 - 3. Review our training manual chapter for details on accessories and the accessory framework concept ([Database Management & Optimization](#))

□ [Add Packages to your Catalog](#)

Packages can serve many purposes. Here is an outline for potential uses of packages split into three types: wiring packages, room solution packages, and headend packages. Review our training manual for details on packages ([Database Management & Optimization](#))

- | | |
|---|---|
| <ul style="list-style-type: none">1. Wiring Packages<ul style="list-style-type: none">a. Site Wiring<ul style="list-style-type: none">i. Fiberii. Copperiii. MPOEb. Multimedia/Voice/Data<ul style="list-style-type: none">i. Cat5e/RG6ii. Cat6
Shielded/Unshielded
(HDBaseT)c. Audio<ul style="list-style-type: none">i. 5.1/7.1ii. 2.0iii. In-Wall Subiv. Landscape (DB)d. Video<ul style="list-style-type: none">i. See multimedia abovee. Security<ul style="list-style-type: none">i. motion/contact
/detector
(heat/smoke)ii. keypad | <ul style="list-style-type: none">iii. sirenf. Access Control<ul style="list-style-type: none">i. keypad/readerii. strikeg. Surveillance<ul style="list-style-type: none">i. IP Cameraii. Analog Camerah. Network<ul style="list-style-type: none">i. APii. Bridge (Point-to-Point) <ul style="list-style-type: none">2. Room Solution Packages<ul style="list-style-type: none">a. TV Installb. Control Systemc. Interfaces3. Head End Packages<ul style="list-style-type: none">a. Rack Packagesb. Control System HEc. Distributed A/V HEd. Security HEe. Surveillance HEf. Access Control HEg. Network HE |
|---|---|

Week Four – Assemble Project Documentation Packages

Now we are reaching the end of this series and it is time to put everything together. Assembling a project documentation package is a powerful concept that is made possible by the fact that all project data can be used throughout the SI application. The idea of a project documentation package can be defined in many ways. You might ask “What documents should be included?” or you could be thinking that “This sounds like it will take too long. I don’t have that kind of time.” A project documentation package can be as simple or as complex as you want it to be. A proposal report might be enough for your customers in many cases. Add in a simple scope of work that describes the project in words. This may go a long way towards showing your customer that you have done your homework. [Report Groups](#) are a way to combine multiple reports into a “proposal package”.

Engineered drawings are a key component of the SI workflow, and our integration with Visio and AutoCAD enable you to quickly create detailed, accurate drawings based on the information in either your product catalog or an SI project.

Consider adding a Visio line diagram and maybe an equipment rack elevation. These can be created in minutes and can be the deliverable that differentiates you from your competition.

- [Get Started with the Visio Interface](#)
- [Create a Visio Line Drawing](#)
- [Create a Visio Elevation Drawing](#)

For AutoCAD users, we offer a similar integration. Floor plan views are the most robust offering on this platform and make for a great solution to share equipment location plan views with project stakeholders using the native DWG file format.

- [Work with the AutoCAD Drawing Interface](#)

For each of these topics, Videos and other guidance is available through the links above. Our training manual used in 3-day trainings is also loaded with direction on the Visio interface. See the following chapters for reference:

- [Visio Introduction and Line Drawings](#)
- [Visio Plan View](#)
- [Visio Elevation View](#)
- [Visio Schematics](#)

Week Five and Beyond

After completing your four week “Getting Started” plan, you may be looking for additional information to keep moving forward. The D-Tools team is here to help. We offer many resources to assist you along the way.

- [SI 2016 Documentation](#)
- [D-Tools System Integrator 3 Day Training Manual](#) (Table of Contents with Links)
- Need Help? [Submit a Support Ticket](#)
- Looking for training or other professional services? See our [Service Options](#)