

Creating Proposals

In this course we will review the Clients, Vendors and Contacts interface, the Manage Projects Interface and the process for creating a new project. We will thoroughly review the project setup process and once we have created a project we will review the Project Editor interface in depth. We will then go through the process of adding items to a project, analyzing project data and various useful tools used for manipulating and creating projects more efficiently.

Course Outline

Clients, Vendors and Contacts

- Interface Overview
- Adding Clients, Vendors & Contacts

Manage Projects

- Manage Projects Interface Overview

New Project Setup

- Creating a Project
- Project Editor Tour

Creating a Proposal

- Adding Products, Labor and Packages to a Project
- Using Options & Alternates
- Advanced Project Utilities (F&R, Update Similar, Clone, etc.)
- Analyzing Your Project

Notes

Clients, Vendors and Contacts

There are three entities, Clients, Vendors and Contacts. Clients are used for Project and Service Order creation. Vendors are assigned to items and can be added to QuickBooks for use in Purchase Orders. Contacts can be associated to Clients and Vendors or they can be "stand-alone". A Client can be a person or a business. Contacts can be standalone entities, but also can be associated with specific Clients. The advantage to associating Contacts with Clients is that when a project gets created for that client, the contacts are automatically imported into the project.

Manage Clients

Clients are a required element used to create projects and service orders. Clients and Contacts both can be added during the process of creating a project or service order, or they can be created in advance.

- **New:** Add a new client
- **Edit:** Edit selected Client (or double click)
- **Clone:** Copy selected client
- **Delete**
- **Include Inactive (Yes/No)**
- **Refresh**
- **Export**
 - **CSV:** Useful for exporting clients, editing the information and importing back into D-Tools – OR for importing into other applications.
 - **QuickBooks:** Exports a Client record to QuickBooks. Note: QuickLinks Integration module is required for this to operate. This also occurs during the first export of a project from D-Tools to QuickBooks
- **Import**
 - **CSV:** Import Clients from a CSV File
 - **Outlook:** Importing a Client from Outlook will create a contact record as well. Re-import will update information in D-Tools from Outlook
 - **QuickBooks:** importing a client from QuickBooks does not create a contact like Outlook does.
- **Create Project:** Creates a new project for selected Client
- **Create Service Order:** Creates a new project for selected Client
- **Create as Contact:** Pulls information from the Client record and creates a new contact

Notes

- **Send Email:** Opens an Outlook email for the selected client
 - **Note:** Client records do not have an email address; a primary contact must be assigned to the client in order to use this feature.
- **Create Appointment:** Opens an Outlook appointment for the selected client
 - **Note:** Client records do not have an email address; a primary contact must be assigned to the client in order to use this feature.
- **Address Types:** Manage the address types. When creating a client you can store multiple addresses and the address types give you a method of defining different types of addresses such as billing/site.
- **View → Contacts:** Switches to the Manage Contacts view.

Add a New Client (Manual)

1. Click New
2. **General Tab:** Enter Contact Information
3. **Addresses:** Add a billing address. Tip: If billing and site address are the same, only enter billing. D-Tools will auto-populate site address during project setup with the billing address if left blank.
4. **Contacts:** You can manually enter a contact here, or you can use the “Create as Contact” button on the ribbon toolbar. Do not enter one right now.

Add a New Client (Import from Outlook)

1. Open your Outlook
2. Click the Import from outlook button on the toolbar.
3. A dialog box opens with all of your contacts.
4. You can select multiple if you wish from here. (Select All tool available)
5. **Actions:** Import or Cancel
6. **Filters:**
 - a. All
 - b. New
 - c. Matched: These may already exist in D-Tools. If you re-import these it will update and overwrite D-Tools with the latest information from Outlook.

Importing from QuickBooks follows the same process as Outlook.

Notes

Implementation Tips

When importing a Client from outlook, a contact record is also created so it is recommended to import records from Outlook as Clients when you intend to have them be a contact associated with their own client record. If the contact is being imported so they can be attached to other clients, it would be recommended to import them as a contact directly.

Add a New Contact for Client

1. Now that Your Client is created, let us create a contact record.
2. Select the Client in the grid.
3. Click “Create as Contact” button.
4. The Add new Contact form opens and you can populate the remaining information.
5. Click Save and Close.

Manage Contacts

Contacts are attached as sub-records to Clients. They are useful to store customer information but also helpful to store contact information for other contractors working on your projects such as builders, electricians, consultants, etc.

- **New, Edit, Clone, Delete**
- **Refresh**
- **Export**
 - **CSV:** Useful for exporting contacts, editing the information and importing back into D-Tools – OR for importing into other applications.
 - **Outlook:** Exports a contact record to Outlook.
- **Import**
 - **CSV:** Useful for importing contacts from CSV files.
 - **Outlook:** Imports a contact record from Outlook.
- **Create as Client:** Takes information from the contact and populates it into a new client record.
- **Send Email:** Opens an Outlook email for the selected contact.
- **Create Appointment:** Opens an Outlook appointment for the selected contact.
- **Contact Groups:** Contact Groups are useful to categorize your various contacts.
- **View→Clients & Vendors:** Switches to the Manage Clients or Manage Vendors pages.

Notes

Manage Vendors

The Vendors list in D-Tools can be used to manage the contact information for your various vendors. The list of vendors can be used to assign the primary vendor for individual products in your catalog, and can also be exported to QuickBooks to maintain a current vendors list there for purchasing. Both users with the QB interface and without will find this feature useful.

- **New, Edit, Clone, Delete**
- **Include Inactive**
- **Refresh**
- **Export**
 - **CSV:** Useful for exporting Vendors, editing the information and importing back into D-Tools – OR for importing into other applications.
 - **QuickBooks:** Exports a Vendor record to QuickBooks. This can also be accomplished when exporting purchase Orders via QuickBooks integration.
- **Import**
 - **CSV:** Useful for importing Vendor records from CSV files.
 - **Outlook:** Imports a Vendor record from Outlook.
 - **QuickBooks:** Import vendor information from QuickBooks.
- **Send Email:** Opens an Outlook email for the selected contact.
- **Create Appointment:** Opens an Outlook appointment for the selected contact.
- **View → Contacts:** Switches to the Manage Contacts view.

Notes

Manage Projects Overview

All of your projects can be managed using this one interface which gives you access to all the tools and resources you need to interact with your project and conduct workflow tasks related to the project. The Manage Projects Interface has five tabs on the ribbon and a section at the bottom of the page to view Files & Revisions.

Project Grid

The Project Grid is where you will select a project to open, run reports, review or make changes to it in some way. The Project grid can be searched or filtered to find the specific project you are looking for. Once a project is completed, many companies choose to archive the projects so the list is not so full of old projects. Archived projects can be unarchived if they are to ever have changes made to them again. Projects can be sorted or grouped using the column headers.

Home

Create

- **New → Project**
- **New → Import Project:** Import a project from an older version of D-Tools, or perhaps a sample project.
- **New → From Mobile Quote:** Create a new project from a Mobile Quote
- **New → From Template:** Create a new project based on a template you have created.
- **Templates:** Create and Publish project templates (includes products, labor and drawings) to use when creating a new project. This can be used if you have projects with different tax rates or different types of project settings for various projects like New Construction or Retrofit.

Open

- **Project Editor:** This is the universal editor for creating and managing the items in your project. Open in the editor when not needing to interact with drawings.
 - Double click a project in the grid will open in the project editor by default.
- **Project Information:** Edit project information and settings here without opening the Editor.
- **Comments:** Add date/time/user stamped comments to a project by various users.

Notes

- **History:** Project history tracks every time a project is checked out or checked into the server. It also tracks changes to project level fields such as Project information or the project price.
 - Changed fields will not appear in history until a project is checked back into the server.

Files

- **Visio:** Create new or Open any existing Visio drawings you have created.
- **AutoCAD:** Create new or Open any existing AutoCAD drawings you have created.

Schedule

- **Calendar:** Opens the company scheduling calendar.
- **Resource Hours:** Opens the resource hours tracking interface.

Manage

- **Clone:** Copy a selected project and create a copy.
- **Delete**
- **Archive:** Removes the project from the active projects list and sets it aside in the project archive. Archived projects can be un-archived at any time.
- **Unarchive:** Restore an archived project back to active status.

View

- **All:** Shows all Projects.
- **My:** Shows only projects where your users is the "Project Owner".
- **Archive:** Filters the project list to only show Archived Projects.

Notes

Filter

- **Quick Filter:** Functions just like the catalog Quick Filter by:
 - **Progresses**
 - **Clients**
 - **Resources**
 - **Assignees:** This is the Project Owner field or “Assigned To”
 - **Options:** Checked in/out, etc.
- **Show Filter:** Shows what the current filter is
- **Reset:** Rests the filter
- **Search:** There is a search bar to allow searching your projects list.

Server

Certain features will only be available for checked in or check out projects.

- **Check In:** Check as project into the server
- **Check Out:** Check as project out from the server
- **Get Latest Version:** Retrieves latest files from server to local computer without actually checking it out.
- **Undo Check Out:** This is essentially an Undo command. It restores the server based project (last version that was checked into the server) back to the state before you checked it out and made changes.
- **Check In All:** Checks in all projects at once. Does not check in other users projects.

Refresh

Other Tools

- **Force Undo Check out:** This tool forces a project checked out by someone else to have the undo check out command processed. This might be used if a user lost their laptop or their computer crashed with a project checked out to it.
- **Rename Project File:** Only way to rename the physical file name of a project.
- **Move:** Only way to physically move a D-Tools project file. This might be used if you began using a new local project folder directly after having had projects crated elsewhere.

Notes

Export

Send To

- **Zip:** Exports the project and all of its files to a zip file. This could be used for backup or to email a project to someone else. This allows you to save the zip to your computer.
- **Outlook:** Zips the files and attaches them to an Outlook email.

Export

- **Excel:** Exports the data in the project list to excel.
- **PDF:** Exports the data in the project list to PDF.

Layouts

- **General:** Shows typical project information
- **Resources:** Shows project resources assigned to each project
- **Custom Fields:** Shows custom fields in the grid
- **All:** Shows all project fields available in the grid.
- **Custom:** Create Custom grid layouts similar to what can be done in the Catalog Layouts.

Reports

Run and manage output of reports for various projects here. We will cover Reporting in detail during the Reporting course.

Settings

The Settings tab provides access to project specific setup and configuration features. The specifics on these were covered in the setup and configuration course.

Notes

Project Tools (Bottom of Screen)

Files

- **Manage:** When attaching files to D-Tools, both D-Tools generated files such as Visio or AutoCAD drawings, you can assign them to a File category or subcategory. Create and manage your file categories and subcategories as well as the order they are listed here.
- **New:**
 - Visio Drawing: creates a new D-Tools Visio drawing file.
 - AutoCAD Drawing: creates a new D-Tools AutoCAD drawing file.
- **Add:** Add a non D-Tools file to project, allowing you to browse your computer and select a file.
- **Open:** Open selected file for editing/viewing.
- **Clone:** Make a copy of a selected file.
- **Delete:** Delete selected file.
- **Change category:** Move a file to a different file category.
- **Rename:** rename selected file.
- **Send To:**
 - Zip: exports the selected file(s) to a zip file and saves to your computer.
 - Outlook: exports files to a zip file and attaches them to an outlook email.
 - Mobile Install: Attaches selected files to an existing mobile install task or service order.
- **Refresh:** Refresh file list from server.

Revisions

The Revisions tab is where you can create, manage and compare project revisions. We will cover Project revision in detail during the Revision Management course.

Tasks

Lists all of the tasks created for the selected project. This will be covered in detail in the Scheduling course.

Service Orders

Lists all of the service orders created for the selected project. This will be covered in detail in the Scheduling course.

Notes

New Project Setup

When creating a new project we are guided through a wizard to ensure essential data is entered for each project. There are only a few fields that are absolutely required to be entered before you open a project for editing, although we recommend inputting as much as you can upfront.

Step 1 – Client Information

- **Client:** A Client must be selected, you have the option here to create a client in one of three ways:
 - **New** (manual creation)
 - **Import from Outlook**
 - **Import from QuickBooks**
- **Project Name:** The Project Name is what will print and display on the header of all reports and what your project is referred to throughout D-Tools.
- **Project Number:** This can be typed in manually or set using a Formatted number from Setup
- **Project Contact** - This is the “Primary Contact” from the Client setup in Clients and Contacts
 - This will be pre-populated if a “Primary Contact” is designated for the Client
 - You can create a new contact here as well.
- **Client Number:** Allows for assigning a Client Number to the project for searching, reporting, etc.
- **Progress:** Assign the project’s progress or “status” here.
- **Price Type:** This defines the default price type to be used in this project. Each item in a project can use various price types, but selecting a default auto selects that price type by default.
- **Assigned To:** This is where the “Project Owner” is designated
- **Start/End Date:** You have the option to define start and end dates for your project once it is started and once it has been completed.

Step 2 – Project Site Address

This is the Physical location of the project and contact information for that location. This information will pre-populate from the Client setup in Clients and Contacts. If you have multiple Site Addresses setup there it will use the Primary Address of that type. You can copy the billing address here using the button. If the Client has multiple addresses you can use the “Change” button to select a different address from the Client data.

Notes

Step 3 – Project Billing Address

This is used for projects that have a different billing address than the site address for the project. You can click “Copy Site Address” if they are the same. This information will pre-populate from the Client setup. If the Client has multiple addresses you can use the “Change” button to select a different address from the Client data.

Step 4 – Define Price Rules for the Project

You now have a choice to set a default price rule for a project. This will apply the price rule for every item added to the job. Example: If you are working a “Cost-Plus” bid, you can set a price rule for this cost plus scenario and all items added to the job will automatically follow that rule. Nice!

Step 5 – Assign Project Tax Rates

Select how you would like to address taxes for this project. It will use your default settings from the Control panel but you have the choice to use custom settings for each project here. See Setup course for more information on Project Tax Settings.

Step 6 – Assign Project Resources

Assign internal resources for the project here. You can also create new resources from this interface. Adding resources was covered in the setup course under Users Setup. Resources to be used in the Scheduling module are not required to be added here.

Step 7 – Additional Project Contacts

Additional Project Contacts are used to store other external contacts related to the project. If contacts are added as part of your Client setup in Clients and Contacts these contacts will be pre-populated here. New Contacts can be added here from the Contacts list or you can create brand new contacts as well.

Notes

Step 8 – Project Scope of Work

The scope of work can be used to track the project's scope. There is a client report that can be run to present this information to the customer. Snippets are pre-saved scope of work statements that can be reused again and again. If you plan to use the scope of work for your projects you can configure a database of scope statements to utilize and save time. **NOTE:** Once your project is created you will have the option of using a "Rich Text Scope of Work" which allows for a Word Pad or Microsoft word document to be used for the scope of work instead of this plain text scope of work editor. This is usually preferred as "rich text formatting" is possible.

Step 9 – Define Locations

This is where you define the Project Locations. The Locations are built using a hierarchy (up to five levels deep) and consists of a series of Parent and Child Locations (Locations and Sub-Locations) to develop this hierarchy.

Locations

Location must be built from the top of the hierarchy down. In our example we should create our areas first. Then we can add rooms to those areas using the Sub-Locations option. To add locations from your locations list created in the setup use the "Add from project Settings" button.

1. Areas to create
 - a. First Floor
 - b. Second Floor
 - c. Landscape
2. Add typical rooms to each of the areas by selecting the Area you want to add the room to.
3. Practice organizing the order of the rooms.
4. The order of locations in this list will dictate the order they display on your proposal reports.

Implementation Tips

1. By configuring common location types in your D-Tools setup you can really streamline the project creation process. Add all of the locations from the last five projects as a starting point.
2. Location Configurations: allow you to export an entire location setup so that it can be reused in the future. This is an effective way to create location "templates" for reuse.

Notes

Step 10 – Define Systems

Systems provide a secondary assignment method for products in the project. They create a way to allocate items to their specific sub-systems in order to aid in project reporting and presentation to the client, filtering items for analysis or documentation. There are many ways in which effectively using systems helps make your process more effective. See the setup course for more information on systems setup in your database.

Step 11 – Project Contract Percentages

This is the default contract payment schedule from your company setup which can be edited on each project. See the Setup course for more information on project contract settings.

Step 12– Project Custom Fields

Project Custom Fields can be used for many purposes. The Property names are renamed in the Setup process. Custom Properties are typically used to store additional information not already tracked by D-Tools.

Save

When you are finished click Save to complete the project setup process. Your project will be created and opened in the project Editor.

Notes

Project Editor Overview

The Project Editor is the interface you will use to manage the items in your projects. The Editor has seven tabs on the ribbon to help you work with your project data.

Home

View

Views provide you with different ways of looking at your project data. Some views are detailed and others provide summary analysis. You will find them to be very helpful when working in your projects.

- **Summary Views:** Provide a breakdown of the project pricing and profitability by:
 - **Phase**
 - **Location**
 - **System**
 - **Item**
 - **Taxes**
- **Detailed Views:** Shows a grid layout of all products by:
 - **Items:** Shows all items
 - **Packages:** shows only packages
 - **Misc. Items:** shows only misc. items

Filters

- **Quick Filter:** Functions just like the catalog Quick Filter by:
 - **Options**
 - **Locations**
 - **Systems**
 - **Manufacturers**
 - **Categories**
 - **Phases**
 - **Vendors**
 - **Package Names**
 - **Estimate Numbers:** Filter for items on specific QuickBooks estimates (if using QuickLinks)

Notes

- **Orders:** Filter for items at various stages of order and installation.
- **Show Filter:** Shows what the current filter is
- **Reset:** Rests the filter
- **Search:** There is a search bar to allow searching for specific items in your project.

Catalog

Add items from the catalog to the project which can also can be achieved via the Product, Labor and Package Explorer on the left side of the interface.

- Add → Products, Labor & Packages

New

Add new products to the project, will not automatically add them to your catalog. These are new items added specifically for the project. They CAN be added to the catalog using the “Update To” function.

- New → Products, Labor, Packages & Misc. Items

Package

- Add To – New Package: Creates a new package and inserts selected items into package.
- Add To – Existing Package: Selected items can be inserted into existing project packages.

Manage

- Edit, Clone & Delete selected items from your projected.

Refresh

- Sometimes after making changes to the data grouping, or mass updating, or assigning new locations or systems to a large selection of items a refresh is necessary.

Open

- **Project Information:** Edit project information that was populated in the project setup wizard.
- **Scope of Work:** Create a plain text scope of work, create a “Rich Text Scope of Work” or attached a previously created “Rich Text Scope of Work”. Also edit scope of work.
- **Comments:** View and Manage project comments.
- **History:** View project history tracking.

Notes

Link

- Mobile Quote: Select a Mobile Quote which has been synced to SI 2015 from an iPad application. Allows you to begin building the detailed proposal from the Mobile Quote details.

Tasks

- Update From: Updates information into project items from Task data. Such as installation status, install date and install notes.

Tools

Replace

Brings up a window to select a replacement product, labor or package item for one(s) that you have selected in the project grid.

Split Bulk Wire

Allows sales person to sell a specific amount of cable and not have to worry about specifying individual runs of cable. The engineer or designer can then split up this "sold" cable into individual runs of cable with their own cable ID, Head End, location, system, etc. If a wire is inside of a package, the location & system assignments are locked unless the package setting for different locations/systems is enabled.

View Connections

View Connections will display any wire connection data for a selected wire. This is especially useful when wires have been used on drawings in Visio or AutoCAD.

Promote

Allows for promotion of an alternate item to become the main item sold in the project.

Mass Update

Provides ability to perform mass updates on project fields. This tool works exactly the same way as it does in the catalog. The difference is that the mass update tool inside a project allows you to update various "project specific data fields".

Price Rules

Brings up a window to select a replacement product, labor or package item for one(s) that you have selected in the project grid.

Notes

Similar Items

This tool allows you to update all similar product or labor items in a project (those with same Manufacturer-Model) to match the configuration of the selected item. This is very useful if you have just updated the data fields on one item and want to push those changes to all similar items.

Accessories

Perform a mass update on all selected items and add the same accessories to them all. Works the same as the function in the catalog management, this tool just works within a project.

Alternates

Allows for mass update of multiple items to include specific products and labor as alternates.

I/Os

Update multiple items in the I/O browser at once. It is not a mass update tool but opens multiple items for editing at once so I/O can be copied and pasted or compared.

Package Items

Add product and labor items to any selected packages in the project. This tool is very effective if you have many packages in a project and need to modify them at once with the same new products/labor.

Order Status

Update the order status of items selected. There are three Order Statuses that we can assign to items in our project: Not Ordered, Ordered, In Stock/Received. We will discuss this later in the course.

Install Status

Update the install status of items selected. There are three fields to be updated: Installed, Install Date and Install Notes.

Notes

Assign

Assign selected items to a new location and system or a location or system only. Also assign bulk wire items to a Head End.

Regenerate

Will regenerate the component IDs for any selected items.

Discard

Discard (delete) optional and alternates items that are selected (or discard all)

Export Options

Items (Export to Excel)

Export all project data or only selected items to excel.

Wire Connections

Wire Connection data (from Visio or AutoCAD drawings) can be exported for all or selected wires in the project. This gives you the ability to export these wires to excel along with all relevant connection data so that wire checklists, labels, etc. can be created outside of D-Tools.

Send to SAP B1

Allows you to export project data to SAP Business One (If you have this enabled via D-Tools)

Bulk Update

Update from CSV

After selected items have been exported from a project, they can be re-imported with changes made to the csv file. The Component ID is the field used to recognize which items are to be updated, so do not change it!

Update Case

Provides a way to keep case settings for project items (Manufacturer, Category and Sub-Category) in sync with the case settings on the server in case they were edited in either place.

Notes

Catalog

Compare With

The Compare tool gives users the ability to compare project data with corresponding items in the Catalog. The tool will allow you to see if there are any differences in price, labor, phase or any number of fields so that you can identify differences between project and catalog. Data fields can then be updated in either direction (to project from catalog or to catalog from project).

Update To Catalog/Update From Catalog

Push updated project data to the server database, or pull data from the server database in order to update selected items in your project. Both have their uses in various types of situations.

Download

Opens D-Tools Data Browser

Update From

Provides ability to compare project items with D-Tools Library and will provide you with any fields that are not in sync. This will show you what fields are different and allow you to choose which fields to update into your catalog/project from the D-Tools library.

Reviews

Make a Data Review for a selected item.

Data Request

Make a Data Request from D-Tools (Data Subscription only)

Notes

Layouts

Layouts are useful shortcuts that help you view specific database information quickly, making it easier to perform mass updates and other database updates.

- **General:** shows common fields to identify items.
- **Description:** shows description oriented fields
- **Price:** Shows pricing and labor related information
- **Accounting:** Shows data specific to accounting/QuickBooks integration
- **Specifications:** Shows specifications data (except I/Os)
- **I/Os:** Shows Input and Output connection details
- **Order:** Shows information related to Purchase Orders
- **Install:** Shows project fields related to Installation status
- **Custom Fields:** Shows all of the custom fields
- **Audit:** Shows fields created to help audit the database
- **All:** Shows all fields.
- **Custom:** Shared with Catalog Custom Layouts

Options

Various options are provided to alter the display of items in the Project Editor grid.

- **Group by:** Provides various options for grouping the data in the Project Editor.
 - None
 - Location
 - System
 - Location & System
 - System & Location
- **Group by Package:** Groups items into their respective packages and non-package items.
- **Keep Accessories with Parent:** Choose to keep accessories grouped underneath parent items or broken out independently.
- **Hide Accessories:** Check this box to hide accessory items in the grid.
- **Hide Alternates:** Shows/hides alternate items
- **Allow Cell Editing:** Choose to allow for in-cell editing in the project editor interface.

Notes

QuickBooks

The QuickBooks tab provides tools to create QuickBooks estimates for items in your projects. You can also manage the settings for your QuickBooks interface here. Layouts are useful shortcuts that help you view specific database information quickly, making it easier to perform mass updates and other database updates.

Reports

Run and manage output of reports for your project here. We will cover Reporting revision in detail during the Reporting course.

Settings

Project Settings inside the project Editor give you the ability to adjust the settings for this project to be different than the global settings for Phases, Tax Rates, Wire Settings, Component ID format and Project Price Adjustments. You can also manage the global project settings which give you the ability to set user preferences for various aspects of working with projects.

Product, Labor and Package Explorer

These three interfaces provide the ability to add products, labor and packages to your projects. We will use this interface shortly when we add items to our project.

- **Grid/Tree View:** you can choose to organize your explorer in a grid or tree view.
- **New:** Add new items to the catalog
- **Edit:** Edit a selected item in the explorer.
- **Quick Filter:** Apply filtering to narrow down the items in the list.
- **Query:** Run queries on your explorer to narrow down the products in the list. (Products Only)
- **Docking:** You can auto-hide the explorer, keep it docked or float it
- **Quantity:** set a quantity for how many of the item you wish to add to the project.

Notes

Drop Zone

The drop zone is used for two things: adding items to the project and assigning them to a location and system, or assigning an item already in your project to a location and system.

- **Add:** When adding items to the project from the Explorer views, you can drag and drop them to the Add box in order to add those items to the project.
- **Assign:** Once an item is in your project you can drag it to the assign box and it will assign it to any location or system you have selected.
- **Location/System:** Both of the above functions work in conjunction with the location and system assignments here. You also have the ability to add or edit locations and systems from here.

Right Click

The Right Click menu provides an easy ability to manipulate items in your projects. In General the right click menu is very effective when wanting to make changes to specific items in the grid. Most of the right click menu items are also located on the toolbar menus. There are a few that operate solely from the Right Click menu:

- **Mass Update [Field]:** When you right click in a specific column location it will auto prompt you to mass update that field, saving you some time.
- **Copy/Paste Items:** You can select items and copy paste additional items.
- **Select/Deselect All**
- **Expand/Collapse All**

Notes

Creating a Proposal

Adding Items to Your Project

There are several ways to add items to your projects, and depending upon where you are at in a project, what specifically you are trying to do, one method might be more efficient/convenient than others.

Using the Explorer Views

I believe that using the explorer views is probably the most efficient manner of adding items to the project, simply due to how quickly and easily you can access it and swap back and forth between products, labor and packages. There are two methods of using the explorer to add items, one is to drag and drop to the “Add” box in the drop zone, the other is to right click and select “Add to project”. I find right click to be a more streamlined method of specification.

Exercise: Add Packages to the Project (Add Method 1)

1. First, choose which locations to add our package to over in the drop zone area on the right
2. Select System = Structured Wiring
3. Open the Package Explorer
4. Find the package called “Wiring – Structured - Multimedia”
5. Set the Qty = 1
6. Right Click → Add to Project

Note: You can use **Ctrl + Left Click** or **Shift + Left Click** to select multiple items to add.

Exercise: Add Packages to the Project (Add Method 2)

1. Leave the same locations and system selected from the last exercise (or reselect them)
2. Open the Package Explorer
3. Using Ctrl + Left Click select the following packages:
 - a. Wiring - Structured – Dual Data
 - b. Wiring – Housewide A/V – (2) Spk/Ctrl
4. Set the Qty = 1
5. Drag and drop the packages inside the “Add” box on the Drop Zone interface.

Notes

Using the Add Buttons

The Add buttons for products, labor and packages located on the Home toolbar also provides a second way to add items into your project.

Exercise: Add Products to the Project (Add Method 3)

1. On the Home Tab click the button “Add Products”
2. Using the Quick Filter Select Category Type = Speakers
3. Choose Category = Speakers
4. Select Manufacturer = Sonance
5. Click Apply
6. Select Model = VP62R in the grid
7. Set Quantity = 2 (remember speakers must be specified as each in SI)
8. Select the proper locations and system in the lists below.
9. Click Add & Close.

Using the Clone Tool

If you have a products already in our project that you want to add elsewhere in the project, you can use the clone tool to quickly duplicate the selected item or items.

Exercise: Add Products to the Project (Add Method 4)

1. In your project grid, select an item that you would like to duplicate
2. Right Click → Clone
3. When the Clone window pops up you will have three choices on how you want to proceed:
 - a. Keep cloned item in same location (unchecking allows you to select a new location)
 - b. Keep cloned item in same system (unchecking allows you to select a new system)
 - c. How to deal with child items being cloned:
 - i. Clone as parent items
 - ii. Clone within existing parent or package item
 - iii. Clone complete package or parent item
4. Set your quantity, locations and systems as needed & Click OK

Notes

Project Specific Data Fields

Once items have been placed in a project, there are database fields that become available that are not available in the catalog because they are project and usually item specific.

- **Component ID:** unique number assigned to every item product and labor item in a project
- **Serial Number:** Place for entering the item's serial number.
- **IP Address:** Place for entering the item's IP Address.
- **Optional:** Clicking this box marks the item as optional. Its price will not be included in the overall proposal price, and the item will be designated as an optional item in the proposal report.
- **Owner Furnished Equipment (OFE):** Marks an item as being supplied by the customer and equipment pricing is zeroed out. You still have ability to change labor and sell accessories however.
- **Non-Billable:** This field is available in packages and accessories within the catalog, but it is not available for standalone or parent items in the catalog. In the project however it becomes available. This is very useful for items added to the project after the contract if items were forgotten or left out.
 - Non-Billable items do not apply selling prices for products or labor to the client, but do persist cost values for product and labor in the project.
- **Discount:** A discount percentage can be applied to an individual item in the project.
- **Net Unit Price:** Net Unit Price can be derived as a result of applying the discount percentage, OR, the net price can be set and the discount amount will be calculated to achieve that net price.
- **Accounting Estimate Number:** The estimate number when the item was sent to QuickBooks.
- **Order Status:** Track whether an item is Not Ordered, Ordered, Received/In Stock.
- **Order Number:** Updated via QuickBooks integration or entered manually.
- **Ordered Date:** The date something is marked as ordered.
- **Received Date:** The date something is marked as received.
- **Install Status:** Either installed or not. (Is updated by mobile installer module or manually)
- **Installed Date:** Date an item was installed. (Is updated by mobile installer module or manually)
- **Install Notes:** Install notes for each item. (Is updated by mobile installer module or manually)
- **Alternates:** Alternate items are assigned much as the accessory items are assigned. Alternates are different than optional items. Alternates are used as an alternate choice for the product and will display as an "Add \$xx.00 or Subtract \$xx.00). A choice must be made which product is desired.

Notes

Using Options & Alternates

One of the newest additions to SI is Options & Alternates, allowing users to propose optional proposal items (yes/no decision by client) as well as propose alternate items (either/or decision by client). This is an excellent way to make the proposal more robust without endless workarounds and processes such as we had to do in the past.

Adding Options

Adding an optional item to a project is very easy. You add it just like you would any other project item, except once it has been added to the project, you edit the item, on the general tab you need to tick off the box for "Optional". Optional items are not included in the main price of the proposal to the client. They will be broken out in a separate section of the proposal to make the client aware that it is an option.

Adding Alternates Method #1

The first way to add alternate items can be used for a single item or for multiple items. Alternates can only be added to products.

1. Simply select the item(s) to which you wish to add alternates.
2. On the Tools menu select the "Alternates" tool.
3. Browse and choose which alternate products you wish to add to the item(s).
4. Choose whether to append or overwrite any existing alternate items.
5. Click Save.

Adding Alternates Method #2

The second way to add alternate items can be used for a single item only.

1. Simply select the item(s) you wish to add alternates to and open it up in the item editor.
2. Select the Alternates area of the item.
3. Browse and choose which alternate products you wish to add to the item(s).
4. Click Save. Adding alternates this way uses the "append option".

Notes

Adding Alternates Method #3

The third way of adding alternate items is via those alternates which were setup in the catalog for your items. These will either be automatically added to the project as an alternate or you will be prompted, depending upon your settings in the Global Project settings.

Formatting Choices for Options & Alternates

- **Project Editor Formatting:** In the project Settings you can choose which color you would like the rows highlighted for optional and alternate products. This is an excellent way to easily identify them when working in the project editor. Easy to apply to the project.
- **Reports Formatting:** In the Report Settings you have multiple formatting choices: you can identify the text color to be used for options and alternates and you can also specify the text used to describe them in their respective areas of the proposal display.

Advanced Project Utilities and Functions

Now that you know the main functions involved with creating a project, it is time to look into some more advanced tools and utilities that will help you take your projection creation process to the next level.

Project Equipment Discounts

There are a few different ways of adding an equipment discount into a project. We will discuss the pros and cons of each here.

Discount by Percentage (Entire Project)

You can use the Product Price Adjustments fields to offer a project discount with a percentage. These fields are programmed to calculate their value based on a percentage of the equipment price in the project. Using a negative percentage will allocate a discount.

- **Pros:**
 - Easy to apply to the project.
 - Auto-adjusts itself as the size of the project price increases or decreases.
- **Cons:**
 - Difficult to get a targeted discount price (i.e. \$500).
 - The discount percentage perpetuates into the future on future revisions

Notes

Discount by Percentage (Items)

You can use the new Discount field at the product level in the project. This field is found on the price tab and is called "Discount". A percentage discount can be applied for individual items, OR using Mass Update you can apply the discount on multiple items at once.

- **Pros:**
 - Provides flexibility for different percentage discounts for various items.
 - Discount amount will show in the project summary.
- **Cons:**
 - Not as easy as applying a bulk discount across the entire project.

Using a Discount Line Item

You can also use an item in your database in order to apply a discount. For this to work you simply add an item with a negative price. Be sure to have cost = 0.

- **Pros:**
 - Easy to hit a target discount amount (i.e. \$500).
 - Does not perpetuate into future revisions.
- **Cons:** Does not auto-adjust with the size of the project.

Project Labor Discounts

Like equipment there are a few different ways of adding a labor discount into a project. We will discuss the pros and cons of each here.

Discount by Percentage (Entire Project)

You can use the Labor Adjustment percentage (Settings → Price Adjustments) to offer a project discount on the labor. Just use a negative percentage.

- **Pros:**
 - Easy to apply to the project.
 - Auto-adjusts itself as the size of the project labor price increases or decreases.
- **Cons:**
 - Difficult to get a targeted discount price (i.e. \$500).
 - The discount percentage perpetuates into the future on future revisions.

Notes

Using a Discount Labor Line Item

You can also use a labor item in your database in order to apply a discount. For this to work you simply add a labor item with a negative price. Be sure to have cost = 0.

- **Pros:**
 - Easy to hit a target discount amount (i.e. \$500).
 - Does not perpetuate into future revisions.
- **Cons:** Does not auto-adjust.

Replace Products

Replace products is a very useful tool for selecting a group of items in your project and doing a replacement of all those items at once. It is much easier than deleting product and adding new product in their place. It can also be used for one item at a time.

1. Filter the project editor for all speakers
2. Select two or three pairs of speakers in the list from various locations using Ctrl + Left Click
3. Right Click → Replace Products
4. Now you have a product selection window and can search to find a suitable replacement
5. Before you replace the items you may want to consider two options you have:
 - a. **Maintain Component IDs:** Keeps the same component ID for the new item
 - b. **Maintain Installation Prices:** Keeps same installation price as the item it is replacing
 - c. **Keep Accessories:** Keeps the current accessories from the item being replaced.
 - d. **Keep Alternates:** Allows you to keep any alternates assigned to the replaced product.
6. Once you have selected an item click Replace and Close.

Notes

Update Similar

The update similar tool is designed to make keeping edited items in your project up to date. For example if I edit the price on a speaker, this tool enables me to quickly and easily update all of the other similar speakers in the project with this price change.

1. Choose one of the speakers in the project.
2. Navigate to the layout tab = Price
3. Edit the Unit Price for the speaker
4. Select the speaker that was updated
5. Right Click → Update Similar Products
6. Now you are presented with a list of fields to choose which will be updated.
7. Click Deselect All
8. Select 'Prices'
9. Click OK – you will be prompted with the number of similar items that were updated.

Update from Catalog

You also have the ability to update items in the project from the data in the catalog. Because there is clear separation between Catalog data and project data, your project is not automatically updated when you update the catalog. From time to time you may find that the data in your catalog has become more accurate than the data in your project. For example if someone were to edit the IO for a specific item and you want to pull that data into your project OR you wanted to refresh pricing on a project created several months ago.

1. Choose an item in your project (multiple can also be selected at once).
2. Right Click → Update From Catalog → Products.
3. You have the opportunity to select which fields to pull into the project using the Options drop down. It is essential to use the Options carefully because you may not want to update the pricing in your project for example.
4. Once you are ready, click Update.

Notes

Update to Catalog

The Update To Catalog function works exactly opposite from the Update from Catalog feature. You would want to use this for example if you had updated data in your project and wanted to push those changes to the catalog for the future.

Mass Update Items into Packages

This tool (Package Items tool on Tools tab) provides the ability to select a single or multiple packages and insert additional items into them all at once without individually editing each package. For example if you realized after specifying packages throughout the project that they all needed an additional cable.

1. From the Home tab, select View → Packages.
2. This shows you a list of all the packages in your project.
3. Using Ctrl/Shift + Left Click select the packages you want to update.
4. Go to the Tools tab on the ribbon.
5. Select the Package Items button.
6. Click Add Products.
7. Select a product from the catalog.
8. Make a choice for how you want to deal with the additional items.
 - a. Append
 - b. Overwrite
9. Choose Append so we can just add the product to the rest of the items in the packages.
10. Click Save.

Copying Items from One Project to Another

D-Tools SI 2015 has the capability to copy and paste data back and forth between two different projects! This gives us amazing flexibility to leverage work we have completed before on other projects. For example if I wanted to reuse the equipment head end from another project – all of the hardware, racks, cables, etc. I can open the other project and simply copy and paste the data into my new project. There are a few considerations to be aware of though:

- When you copy and paste items it is easiest to drag and drop selected items from one project to the other. Copy and Paste works too.

Notes

- In Visio – it is better to use the “insert drawing pages” function as it allows you to insert not only the items on the page, but also any accessories or package items associated with the items on the drawings. (You can copy/paste specific shapes from Visio, but it will ignore any related items not selected for copy/paste.)

Analyzing Your Project

Once you have begun creating a project you have various tools and resources available to help you analyze the information in your project.

Using Views

The project views (both summary and detail views) provide excellent ways to view your project from different angles. Knowing what each of them provides can be very helpful to you when you need to analyze your project in detail. Specifically, I find that using these views reduces the need to run specific reports for analysis.

Phase Summary View

1. From the View menu, select the Phase view
2. You are provided with summary numbers for equipment and labor pricing as well as margins.
3. By clicking on the phase name you can drill down to the specific items in that phase and view the numbers associated with those items, searching for any with issues.
4. Click the return button to return back to the original view.
5. Tip: Look for Phase – “Unassigned” – remember that items without a phase will not charge for labor!

Other Summary Views

The other views will also be helpful to you as well:

1. Location
2. System
3. Items
4. Tax

Notes

Using Filters

There are a few filters I find to be excellent resources to help analyzing my project before submitting a proposal.

Quick Filter

1. From the Layouts menu select the Pricing layout
2. From the Home menu choose Quick Filter → Options
3. There are two choices on this menu that are very effective for project analysis:
 - a. Items with Zero Cost
 - b. Items with Zero Price
 - c. Items with Zero margin & Markup
4. Utilize these one at a time, otherwise it looks for items meeting both criteria). This will help you to identify any items missing pricing and help you to fix any errors.

Column Filters Example #1

1. From the Layouts menu select the Pricing layout
2. Each column shown in the grid has the ability to be filtered and can assist in finding unwanted values.
3. Click the filter button on the Unit Cost column
4. Deselect the All checkbox so that none of them boxes are selected
5. Select the box next to \$0.00
6. You have now filtered for items with zero cost and can fix them.

Column Filters Example #2

1. From the Layouts menu select the Pricing layout
2. Click the filter button on the Phase column
3. Deselect the All checkbox so that none of them boxes are selected
4. Select the box next to "Blanks"
5. You have now filtered for items with blank phases and can fix them.
6. It is very important to identify any items in your project that do not have a phase assigned. The labor pricing is stored with the phase, and if a phase is blank you will not be charging for that item's labor.

NOTE: Use the column filtering for other critical fields you want to verify such as Unit Labor Hours or Taxable

Notes

Compare With Catalog

The Compare with Catalog tool provides the ability to compare project items with their corresponding records in the main catalog. This can be an extremely useful tool on projects for numerous reasons: To check project pricing against the catalog (and update it one way or the other...), and it can also be used to check various other fields. Managers can compare projects to be sure sales staff have not reduced or changed pricing on items in their project as well.

1. Select an item or items in the project editor
2. From the Catalog menu select Compare With →Products or Labor
3. Select the specific fields you wish to compare from the project to the catalog
4. If the items are different you will be presented with the project Value and the SI 2015 value
5. You can then:
 - a. Update from Project to Catalog
 - b. Update from Catalog to Project
 - c. Edit the item
 - d. Filter for Similar, Dissimilar or All items

Resolving Issues Found During Analysis

When you find issues in the project that need to be resolved there are a few useful tools you can use.

Mass Update

1. When you have multiple items to resolve (and all of them have the same field to be updated with the same value) use the mass update tool.
2. Example: Items that are not marked taxable (and need to be).
3. Select all of the items found using your filtering.
4. Choose Mass Update.
5. Select Taxable Field.
6. Check the box and click save.

Notes

In Grid Data Entry

1. Sometimes you have one or two items that need to be resolved (for example an item that is missing a price). Certain fields in the grid can be updated, but not all.
 - a. Unit Cost
 - b. Unit Price
 - c. Labor Hours
 - d. Margin
 - e. Markup
2. Simply type into the grid to enter the data.
3. You will see an edit icon with a pencil in the column header if the item can be edited.

Notes