

## SI 2016 Key Features

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D-Tools System Integrator 2016 (SI 2016) is a fully integrated software package that ties together the entire system integration process into one complete solution. SI 2016 enables system integrators to generate fast, accurate project estimates and proposals, detailed system designs and client documentation through a complete data-driven process.

Building new functionality on the architecture of the System Integrator platform as well as D-Tools Cloud infrastructure, SI 2016 makes it faster and easier than ever to perform key functions of an integrator's business – estimation, system design, and project management. SI 2016 offers improvements in key functional areas of the solution, including data integration and project management, QuickBooks Online and third-party integrations, purchasing and change order management, mobile connectivity, as well as overall productivity enhancements. The application delivers a powerful yet easy to use solution that provides a positive impact on an integrator's business.

### Key Features at a glance

- SupplyStream Integration**
- Purchase Orders**
- QuickBooks Online Integration**
- Data, Catalog, Project, Drawing Enhancements**
- Scheduling & Mobile Install Enhancements**

### Data and Catalog Improvements

The SI 2016 Product Catalog offers significant improvements to help users better manage product information and pricing –the main drivers of D-Tools' data-driven process.

SI 2016 includes additional features for catalog management, including integration with SupplyStream that enables downloading individual dealer cost and vendor availability directly from the D-Tools Data Library. Enhancements to Packages and Price Rules give SI users unparalleled control over margin, markup, and overall product pricing.

**SupplyStream Integration** – SI users can search the SupplyStream product catalog from within the D-Tools Data Library. SupplyStream products can be downloaded directly into the local catalog (D-Tools Data Subscription required), and SupplyStream customers can download vendor and dealer pricing.

**Package Improvements** – D-Tools packages can be assigned a specific price type or follow a project price type. When a package with a specific price type is added to a project all package products will be added at that specific price regardless of the project price type.

**Price Rules Improvements** – Previously managed separately, Price Rules for products in the catalog and products in a project have been merged into a single list, further streamlining the pricing process. Price Rules can be applied across price types in the catalog or in a project, giving even more control and flexibility over pricing for complex jobs.

## Projects and Productivity

SI 2016 boasts a number of productivity enhancements around project creation, editing, and management. From subtle UI enhancements to specific features, users will benefit from improved workflow and time-savings for many of the operations used on a daily basis.

**Purchase Orders** – SI users can create Purchase Orders with products in the catalog and directly from a project or multiple projects. A purchase order can be published via D-Tools' new Vendor Portal, which facilitates communication between SI users and vendors. Vendors get notified when a PO is published to the portal. The vendor can sign in and view PO, accept/reject, and enter a vendor reference number. SI users can track progress of POs and mark items as partially received, received, or cancelled. Received items can be automatically added/updated in a project or across multiple projects.

**Vendor Portal** – The Vendor Portal enables Vendors to accept POs from SI users. Vendors get notified when a PO is published to the portal. The vendor can sign in and view PO, accept/reject, and enter a vendor reference number.

**Update Project Items from PO** – Project Items can have the order fields updated from SI purchase orders. If an SI project has associated purchase orders with “Partially Received” or “Received” status, the ordered and received fields can be automatically or manually updated, along with additional information such as Order number, Ordered and Received Date, Vendor, and Unit Cost.

**QuickBooks Online Integration** – SI 2016 improves on the already seamless integration to QuickBooks, adding support for QuickBooks Online, eliminating the need for double data-entry and duplication of efforts. Products from the SI 2016 catalog or a project can be pushed directly to QuickBooks for accurate accounting, purchasing and invoicing.

**Easy Setup** – SI 2016 QuickBooks Settings enables users to set connection type as either QuickBooks Desktop or QuickBooks Online. When accessing any QuickBooks function from SI 2016 with the connection type set to QuickBooks Online, users will be prompted to first connect to QuickBooks Online and authorize the connection. Once authorized, users have the option to automatically connect to their QuickBooks Online company file for future sessions.

**Add Discount to Project Price Rules** – This allows users to change the Net Unit Price of products in a project and maintain a discount instead of changing price directly.

**Round Up/Down Price of Products** – This allows users to round up or down the cost and price of products in a project. There are four options – round, round up, round down, and round to nearest decimal point. Rounding can also be applied when using a price rule.

**Compute Price of Miscellaneous Items and Service Order Labor** – Users can calculate the price of a miscellaneous item in a project based on project items. This can be useful to help calculate warranty costs or shipping. This same functionality can also be applied to adding a labor item in a Service Order.

**Project Editor Improvements** – A number of productivity enhancements have been added to the SI 2016 Project Editor, all designed to save time and increase efficiency.

**Promote Revision File Restore** – Gives users the option to select which files to restore or overwrite when promoting a project revision.

**Import Locations/Systems to Insert Drawing Pages** – Option to add locations/systems from the source project to destination project.

**Import/Export Scope of Work RTF Files** – Enables sharing of Scope of Work files across projects.

**Update Similar Items Prompt** – notifies user to update similar items when item editor is closed.

**Improved Project History** – displays changes on each project check in.

## Drawing Improvements

SI 2016 continues to add upgrades to D-Tools' legendary design capabilities. Changes to the D-Tools Visio and AutoCAD interfaces provide users with unparalleled power and automation tools that will help better generate industry-specific drawings with data-driven Visio Shapes and AutoCAD blocks – streamlining the design process and significantly improving communication across teams.

**Off-page Reference Shape in Visio** – This new shape enables Schematic drawings to reference connections that span locations and/or pages. An off-page reference provides visual information on connection points and provides information such as Component ID, connected page name, or connected shape Port.

**New Plan View Shapes w/Coverage** – New plan view shapes show area coverage for motion detectors, dome cameras, and wireless access points. These new shapes have options to show colors, degrees of coverage (from 10 to 360 degrees) in order to visually communicate signal coverage.

**Auto Save in Visio and AutoCAD** – automatically saves changes in project when creating/editing drawings in AutoCAD, and saves changes to project and drawings in Visio.

## AutoCAD Enhancements

**AutoCAD – New Blocks** – SI 2016 ships with new J-STD and SIA plan view blocks for industry-standard drawings.

## Visio Enhancements

**Support for Visio vsdx file format** – SI 2016 supports the new Visio file format with extension vsdx. The new format has a number of improvements and results in a smaller file size and better performance.

**AutoConnect on Visio Line Views** – AutoConnect enables faster connections when doing Line drawings. Directional arrows appear and when clicked will automatically connect to the next shape and the default connector will be replaced with our Line Connector to designate signal flow.

**Add Blank Port to Schematic Shapes** – Blank ports enable the separation of input and output groups in schematic drawings for better organization and visual communication.

**Plan Shape Improvements** – Plan shapes in SI 2016 have unique capabilities, enabling users to assign shapes to specific categories or sub-categories, as well as offer control for specific variations by utilizing the Shape Data UI. The Plan Icon shape automatically configures itself based on the shape choices selected by the user. Variables such as mount type, color, text are configurable and offer the user complete control over look and feel.

## Calendar and Scheduling

D-Tools' company and project calendars give users the option to create Tasks and Service Orders for any user or resource. Tasks and Service Orders can be moved around the calendar via drag and drop, making it easy to move items around as schedules change. The new calendar has a Quick Filter to quickly find resources and check status of Tasks and Service Orders. Calendar items can also be viewed on a per-project basis.

**Add Timeline View to the Calendar** – D-Tools' Calendar now features a timeline view in addition to the standard Day, Week, and Month. The timeline duration can be changed, ranging from 15 minutes to 1 day.

**Add Business Hours to Scheduling** – Companies can now define their business or working hours. The default setting is Monday through Friday 9 am to 5 pm. The Business Hours dialog allows users to select working days, holidays, and hours of operation.

**Add Description and Contact to Project Tasks** – Tasks now have a description and a contact. The default contact is the primary project contact, however this may be changed for a specific task.

**Add IP Address to Task Items** – IP Addresses can now be edited on task items and will sync to project from the task item.

**Add Project Number to Service Order and Task displays** – Project Number has been added to Service Order Explorer and Task Explorer and can also be searched on in these views. The tooltip on Calendar also displays the Project Number.

**Prompt to Publish to Mobile Install from Calendar** – When user drags or changes dates on published tasks and service orders in the calendar there is a prompt to publish to Mobile Install.

## Mobile Install

SI 2016's Mobile Install (MI) functionality gives users the power to publish install Tasks and Service Orders to a web portal powered by the D-Tools cloud that can be accessed by technicians and installers in the field from any device. Installers and Technicians can track install time and completion status, take notes and photos of the install, and sync this information back into SI 2016 for accurate time and install tracking. We've added enhancements to time tracking, adding items on-site, and other enhancements to make Mobile Install an indispensable part of the SI platform.

**Time Sheets – Track and Export Time Entries** – Time Sheets can be created in Mobile Install and exported to a CSV file from Mobile Install. When Time Sheets are enabled users can enter time entries on tasks and service orders for each day. The installer actual hours are computed from their respective time entries. Time Sheets can be exported to a CSV file for import into other systems. Exported Time Sheets can be used to make entries into QuickBooks or other accounting system.

**Add Site Items to Install Tasks and Service Orders** – Track and account for additional work in the field and empower your techs to add additional products or services and get customer approval on the spot. Approved added items or services can be added to an existing SI 2016 project.

**Send Email when Task or Service Order is Complete** – Automatically notifies project manager (or task creator) when the install task or service order has been marked as completed.

**Add IP Address to Task Items in Mobile Install** – IP Addresses can now be edited on task items and will sync to project from the task item.

## Reports

New and updated report templates and themes, new report settings and enhancements to custom reports and report groups are just a few of the productivity improvements in SI 2016 reporting.

**New Client Reports** – There are 4 new client reports - Company Profile, Line Item Detail (Discount and Net Price), Line Item Detail (Unit Price and Total Price) and Product Details.

**Arrange Items in Proposal Reports** – Projects have an option to arrange items for Client reports. The Items grid displays unique items in a project. An item could be Equipment, Labor or Package. The grid allows users to arrange items to a specific order. The grid supports drag/drop and Move Up/Down with multiple rows selected. "Include Options" allows users to select which items are arranged and which are not arranged.

**Company Profile Report** – SI users can now create a RTF of their company profile. The Company Information dialog has a "Profile (RTF)" tab where users can attach a profile of their company in RTF format (similar to attaching scope of work RTF to a project).

**Product Details Report** – The Product Details report lists all unique products in project with a large image. The products are not grouped into location or systems. This allows users to showcase important products in a project. The Catalog product has a field "Show in Product Detail" report (default True).

**Checklist with Install Status** – New install report to indicate item install status.

**New Report Definitions** – "Show Labor Hours for Labor Items in report" and "Hide project summary" enable better visibility control.