

WHICH SOLUTION IS BEST FOR YOUR COMPANY?



FREE Trials at:
www.d-tools.com

D-Tools provides core business software that streamlines the entire project workflow for integrators from initial client contact through on-going servicing, all through a data-driven process that leverages an extensive and integrated product library.

Ultimately, the use of D-Tools' award-winning software leads to improved operating efficiency and healthier bottom-line results.

D-Tools Cloud

D-Tools Cloud is an easy-to-deploy web-based solution that provides a simple, yet powerful end-to-end workflow for smaller, residential integrators. D-Tools Cloud offers sales pipeline management, on-the-fly estimating using a drag-and-drop interface from any mobile device, interactive system design presentations, procurement using supplier-authorized dealer-specific pricing, and a new project management suite of features.

System Integrator

D-Tools System Integrator (SI) is a robust, comprehensive, on-premises solution catering to the diverse needs of sophisticated residential, commercial, security, and HVAC building control & automation integrators as well as technology managers at universities, corporations, and governmental entities. SI is an end-to-end software solution that substantially improves operating efficiencies by streamlining the entire project workflow – from estimating, system design and documentation, procurement, project management, installation, and on-going service, all through a data-driven process that leverages an extensive, integrated product library.



WHICH SOLUTION IS BEST FOR YOUR COMPANY?



A powerful, yet easy-to-use multi-OS, web-based SaaS solution featuring:

Sales

- Integrated Product Library with Supplier Pricing
- CRM and Opportunity Management
- Visual Quoting
- Quote and Proposal Generation
- eSignatures and Client Communications
- Payment Processing

Drawings

- Browser-based Drawings (*plan views*)
- Whiteboards™ Mark-up Tool
- Draw First
- In-drawing Collaboration
- BOM and Drawing Synchronization

Project Management

- Project and Resource Planning
- Scheduling
- Time Tracking
- Item Tracking
- Mobile View for Field Technicians
- Project Status Reporting

Back Office

- Accounting Integration with QuickBooks Online
- Visual Reports and Analytics

Support and Training

- Quick and Easy Setup
- In-app Support



A robust, comprehensive, on-premises solution featuring:

Sales

- Integrated Product Library with Supplier Pricing
- Mobile Quote™ Scope & Budget Development Tool
- Quote and Proposal Generation
- Change Orders
- Service Contracts
- Customer Portal for eSignatures & Client Communications
- Integration with Salesforce CRM

Engineering

- Visio and AutoCAD Support and Integration (*plan views, line, elevation, and signal flow schematic diagrams*)
- Industry Standard Shapes and Symbols
- BOM and Drawing Synchronization

Project Management

- Scheduling
- Gantt Charts
- Mobile Field Management
- Work Order and Service Order Management
- Wire Labels and Checklists
- Item Tracking
- Project Reporting
- Workflow Rules, Management, and Notifications

Back Office

- Accounting Integration (*QuickBooks Desktop and Online, Netsuite, SAP B1*)
- Purchasing and Receiving
- Mobile Inventory Tracking (*Tracknicity and TRX.io integration*)
- Job Costing (*Tracknicity integration*)
- Barcode Scanning
- BI Reporting & Analytics
- Support and Training
- Flexible Deployment Options (on-premises or in the cloud)
- Implementation and Training
- Ongoing Support
- 3rd Party Integrations

* Best for companies needing more detailed engineering drawings, documentation and field management – capabilities that are better suited for managing large projects.

FREE Trials at:
www.d-tools.com