

# ESTIMATE. DESIGN. INSTALL. SERVICE.



D-Tools System Integrator (SI) is an end-to-end software solution for system integrators that substantially improves operating efficiencies by streamlining the entire project workflow – from estimating, through 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.

## Features

- ☐ **Integrated Product Library** – Drive proposals and system designs through D-Tools' comprehensive Product Library with supplier pricing.
- ☐ **Sales Management** – Win more bids with accurate, professional-looking proposals.
- ☐ **System Designs** – Generate detailed drawings via integrated Visio and AutoCAD for clear communication with teams and clients.
- ☐ **Installation and Service Management** – Manage your remote field and service technicians from any device to deliver jobs on-time and on-budget.
- ☐ **Back Office Management** – Manage project procurement while leveraging back-office resources through integrations with QuickBooks and other accounting and ERP systems.

“We needed software that would allow us to estimate, draw, and keep track of changes accurately for our business. D-Tools gives us that, along with capabilities that help our company take on bigger jobs and grow.”

– Brian Krisko,  
Sales Manager for Electronic  
Design Company



**FREE Trial at:**  
**www.d-tools.com**

For more information contact [sales@d-tools.com](mailto:sales@d-tools.com) or call 1-866-386-6571 | [www.d-tools.com](http://www.d-tools.com)

# D-Tools System Integrator Features Overview:

## Sales

- ☐ **Integrated Product Library**  
Seamlessly add products including unique dealer pricing to proposals and drawings from D-Tools' extensive product library
- ☐ **Quote and Proposal Generation**  
Create fast, accurate quotes and proposals from any device and share online for client review, sales team notifications, and e-sign approvals
- ☐ **Mobile Quote™ Scope & Budget Tool**  
Use Mobile Quote™ companion iPad app to maximize your site visits to quickly establish a project scope and budget
- ☐ **Opportunity Management**  
Manage sales opportunities, keep track of your pipeline, and all documents in one interface
- ☐ **Change Orders**  
Create, track and manage internal and client-facing change orders.
- ☐ **Customer Portal for eSignatures & Client Communications**  
Get notified when clients view, comment and sign a proposal or change order via D-Tools Customer Portal

## Engineering

- ☐ **System Design Tools**  
Create detailed, engineered drawings (*single-line system layouts, plan views, rack elevations and schematics*) for clear communication with internal and external stakeholders through native integrations with Visio and AutoCAD
- ☐ **Industry Standard Shapes and Symbols**  
Take advantage of D-Tools-provided industry-specific Visio shapes and AutoCAD blocks to create drawings faster
- ☐ **BOM and Drawing Synchronization**  
D-Tools' plug-in to Visio and AutoCAD ensures that your bill of materials and drawings are always in sync
- ☐ **Draw First**  
Ability to draw a system first and have the BOM auto-generated based on your layouts

## Back Office Management

- ☐ **Accounting Integration**  
D-Tools' integration with leading accounting applications (*i.e. QuickBooks, NetSuite, Sage 100, Solutions360*) eliminates double-data entry and enables accurate accounting, purchasing and invoicing
- ☐ **Purchasing and Receiving**  
Easily generate purchase orders and receive items
- ☐ **Payment Processing**  
Integrated credit card and ACH processing
- ☐ **Reports & Analytics**  
Track and measure Key Performance Indicators (KPI) such as sales forecasts and results, labor utilization, vendor engagement, product usage, profit analysis and more

## Project & Service Management

- ☐ **Scheduling**  
Assign work orders and service orders to employees and subcontractors
- ☐ **Field Management**  
Add site notes and photos, track work completed, enter time, get customer signatures and document changes from the field via any mobile device
- ☐ **Work Order and Service Order Management**  
Schedule and manage installation tasks and service orders
- ☐ **Wire Labels and Checklists**  
Automatically generate schedules and labels to expedite and simplify field work
- ☐ **Item Tracking**  
Using at-a-glance views, project managers can track the status of when items are ordered, received and installed
- ☐ **Project Reporting**  
Powerful project reporting capabilities help deliver the job on time and to budget
- ☐ **Gantt Charts**  
Map out project execution details. Create and view tasks by phase, system and/or location, assign resources, and set start and end dates, key milestones and dependencies
- ☐ **Punch List Management**  
Create customized punch lists (and reusable checklists), assign responsible parties, and track completion status and date
- ☐ **Workflow Rules, Management and Notifications**  
Set up rules to ensure that work flows seamlessly between departments, team members are notified when tasks or milestones are completed or missed, and business leaders are informed of key events

## Support and Training

- ☐ **Flexible Deployment Options**  
Host D-Tools on-premise or in the cloud
- ☐ **Implementation and Training**  
A dedicated team of experienced instructors provide training, implementation support and report customization to ensure full utilization of the power of D-Tools in the shortest amount of time possible
- ☐ **Ongoing Support**  
Get the answers you need quickly with live technical help, flexible training options, webinars, and community engagement
- ☐ **3rd Party Integrations**  
Connect with other software solutions for a seamless end-to-end workflow