

ESTIMATE. DESIGN. INSTALL. SERVICE.



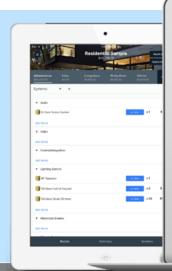
D-Tools System Integrator (SI) is an end-to-end software solution for system integrators that substantially improves operating efficiencies by streamlining the entire project workflow – from estimating, through system design and documentation, procurement, project management, installation, and on-going 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





D-Tools System Integrator Features Overview: Project & Service Management ☐ Integrated Product Library ☐ Scheduling Seamlessly add products including unique dealer pricing to Assign work orders and service orders to employees and proposals and drawings from D-Tools' extensive product library subcontractors ☐ Field Management Quote and Proposal Generation Add site notes and photos, track work completed, enter Create fast, accurate quotes and proposals from any device time, get customer signatures and document changes and share online for client review, sales team notifications, from the field via any mobile device and e-sign approvals ☐ Work Order and Service Order Management Schedule and manage installation tasks and service Use Mobile Quote™ companion iPad app to maximize your site visits to quickly establish a project scope and budget orders □ Wire Labels and Checklists Opportunity Management Automatically generate schedules and labels to expedite Manage sales opportunities, keep track of your pipeline, and and simplify field work all documents in one interface ☐ Item Tracking □ Change Orders Using at-a-glance views, project managers can track the Create, track and manage internal and client-facing change orders. status of when items are ordered, received and installed ☐ Customer Portal for eSignatures & Client Communications □ Project Reporting Get notified when clients view, comment and sign a proposal Powerful project reporting capabilities help deliver the or change order via D-Tools Customer Portal job on time and to budget **Engineering** ☐ Gantt Charts ☐ System Design Tools Map out project execution details. Create and view tasks Create detailed, engineered drawings (single-line system by phase, system and/or location, assign resources, and layouts, plan views, rack elevations and schematics) for set start and end dates, key milestones and clear communication with internal and external stakeholders dependencies through native integrations with Visio and AutoCAD ☐ Punch List Management ☐ Industry Standard Shapes and Symbols Create customized punch lists (and reusable checklists), Take advantage of D-Tools-provided industry-specific Visio assign responsible parties, and track completion status shapes and AutoCAD blocks to create drawings faster and date ☐ BOM and Drawing Synchronization Workflow Rules, Management and Notifications D-Tools' plug-in to Visio and AutoCAD ensures that your bill Set up rules to ensure that work flows seamlessly of materials and drawings are always in sync between departments, team members are notified when □ Draw First tasks or milestones are completed or missed, and business leaders are informed of key events Ability to draw a system first and have the BOM auto-generated based on your layouts Support and Training **Back Office Management** ☐ Flexible Deployment Options ☐ Accounting Integration Host D-Tools on-premise or in the cloud D-Tools' integration with leading accounting applications ☐ Implementation and Training (i.e. QuickBooks, NetSuite, Sage 100, Solutions360) A dedicated team of experienced instructors provide training, eliminates double-data entry and enables accurate implementation support and report customization to ensure accounting, purchasing and invoicing full utilization of the power of D-Tools in the shortest amount Purchasing and Receiving of time possible Easily generate purchase orders and receive items ☐ Ongoing Support Payment Processing Get the answers you need quickly with live technical help, Integrated credit card and ACH processing flexible training options, webinars, and community engagement ☐ Reports & Analytics Track and measure Key Performance Indicators (KPI) such ☐ 3rd Party Integrations as sales forecasts and results, labor utilization, vendor Connect with other software solutions for a seamless engagement, product usage, profit analysis and more end-to-end workflow