

Technology professionals and service providers have unique and diverse needs when it comes to running the day-to-day operations. D-Tools System Integrator software addresses those needs by putting the right tools in your hands to intuitively guide you through the project life-cycle. Leveraging D-Tools SI streamlines work-flows, improves team communication, reduces errors and oversights and ultimately makes life easier and improves bottom line results!

D-Tools SI Features Overview

Sales

- Opportunity Management**
Manage sales opportunities and track your pipeline and proposals all in one interface
- Mobile Quote™ Scope & Budget Tool**
Mobile Quote™ companion iPad app maximizes your site visits to quickly establish project scope and budget
- Product Library**
Seamlessly add products to your proposals (and drawings) from the D-Tools' extensive product database
- Quote and Proposal Generation**
Create fast, accurate quotes and proposals from any device
- Change Orders**
Create, track and manage internal and client-facing change orders
- Customer Portal for eSignatures & Client Communications**
Share proposals and change orders online, and get notified when clients view, comment and esign with D-Tools Customer Portal

Project & Service Management

- Scheduling**
Schedule employees and subcontractors in an easy-to-use calendar-based interface
- 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**
Assign and manage installation tasks, and even include maps, times allotted per task, and required project documentation (*i.e. drawings, installation manuals*)
- Wire Labels and Checklists**
Automatically generate wire schedules, connection checklists and labels to expedite field work and reduce oversights and return visits
- Item Tracking**
Using at-a-glance views, project managers can track the status of when items are ordered, received, picked and installed
- Project Reporting**
Powerful project reporting capabilities help deliver the job on time and to budget
- 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

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**
Draw the system first and have the BOM auto-generate in the process

Back Office

- Accounting Integration**
Integrations with leading accounting applications (*i.e., QuickBooks, NetSuite, Sage 100, Solutions360*) eliminate double-data entry and enable accurate accounting, purchasing and invoicing
- Purchasing and Receiving**
Easily generate purchase orders and receive items
- Payment Processing**
Collect client deposits vis 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

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 work-flow