

New in **SI** System Integrator 2015 At a Glance

System Integrator 2015
is the latest version of
D-Tools' award-winning
software platform



Building new functionality on the architecture of the System Integrator platform as well as D-Tools' Cloud infrastructure, SI 2015 makes it faster and easier than ever to perform key functions of an integrator's business — estimation, system design, and project management. Moreover, SI 2015 offers improvements in virtually every functional area including data and project management, QuickBooks and third-party integrations, mobile connectivity, as well as a major upgrade in the software's drawing capabilities. The application delivers a powerful yet easy to use solution that positively affects — and improves all areas of an integrator's business.

Major Features



- o Mobile Installation Management
- o Review and rate products
- o View Inventory in QuickBooks
- o Update Order Status from QuickBooks
- o Add Alternates to Catalog Products
- o Export Clients and Contacts to CSV
- o Improved search fields in Clients, Vendors and Contacts
- o Support AutoCAD 2015
- o Track History of project check ins and check outs
- o Add Default Product Price Rule to Projects

Mobile Install

- o Publish Tasks and Work Orders to Mobile Install
- o Assign & Schedule Mobile resources
- o Adaptive formatting to work on any device
- o Notifications for New, Revised, and Completed Tasks
- o Enter install status, notes, serial numbers and actual install times
- o Take photos and store with project
- o Syncs field information back into SI 2015



Continued on other side...

Catalog



- Review and rate products
- Add Alternates to Catalog Products
- Enhanced search in Product and Labor Explorer
- Display Package Item Count in multiple UI areas
- I/O Studio enhancements

Projects



- Control number of digits, separator, and starting number for Component ID
- View and Export Wire Connections to a CSV file
- Allow Contract Payments to be defined as fixed amounts or percentage
- Apply a default price rule when adding products to a project
- Improve Wire Length/Head End dialogs to display parent items
- Update "Install Status" in Project Editor
- Add Install Notes to Project Items
- Allow "Add" and "Add and Close" when adding location and systems
- Add a "Maintain Labor Hours" to Replace Product function
- Add Category to Project Files
- Track History of project check ins and check outs
- Add 4 Text Custom Fields to Projects
- Clone a revision as a project
- Clone an existing drawing file in project
- Project Explorer Search searches all text fields including Notes

QuickBooks



- View Inventory in QuickBooks
- Update Order Status from QuickBooks
- Group by Locations, Systems or Phases in QuickBooks Estimates
- Transfer Notes field for a Project and Service Order to QuickBooks

Drawings



- Support AutoCAD 2015
- Faster Visio and AutoCAD startup & check for stencil/block updates
- Higher resolution Line Image Shapes in Visio
- Stencil Tree in Visio displays D-Tools, J-STD-710, SIA shapes
- Improved Stencil and Block Downloads
- Project setting to paste shapes and blocks as New, Clone, or Alternate
- Project setting to use Company Logo in new Visio drawings
- Allow multiple shapes and blocks to be selected for "Change Shape" and "Alternate Shape"
- New Project Editor filters for Connected Wire and Disconnected Wire
- Allow shapes and blocks to be linked to an existing product in project
- Allow Link to New Product in Drawings to work on multiple shapes

Reports



- Report Setting to "Display Alternates prices in aggregate"
- Display optional item subtotals in project summary on proposal reports
- Allow Group Report Settings to be set on a per Report Group basis
- Add permission for Run/View Client reports
- Allow deletion of multiple server reports
- Brother Label integration enhancements
- Add option to "Hide Manufacturer" to Proposal reports
- Improve existing Excel Wire Connection Report
- Vendor Name List in Report Filter
- Add Project Default Price Type to reporting schema

Service Orders



- Add Custom Layouts to Service Order Explorer
- Add Billing Address to Service Orders
- Increase Notes field to 3000 characters

For more information contact sales@d-tools.com
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