d-tools
System Integration Software

New in

SI System Integrator

D-Tools System Integrator (SI) is the most widely-used and comprehensive estimation and budgeting, design, and project management on-premises software solution, specifically designed to fulfill the diverse needs of system design and installation firms.

The latest update - SI version 12 - provides beneficial new performance and productivity enhancements that enable commercial AV and security professionals to streamline business operations for improved operational efficiency and increased profitability.

New Enhancements Include:

Workflow Rules
- Workflows can be set up to trigger an action and/or send a notification based on user-set criteria for the following SI entities: Projects, Purchase Orders, Tasks, and Service Orders.
- Entities and/or their reports can be locked when a rule is triggered, requiring a user with permissions to unlock them before edits can be made

Notifications
- Notifications can be sent to SI users in-app, as well as emailed, to inform team members of project and sales activities, ensuring everyone assigned to the project has the information they need to adapt to project change, and to stay on-task as required.

Calculate Items
- Easily calculate the Unit Cost and Unit Price values of products and labor items derived from formulas based on a variety of fields within SI
- Automatically calculate overall project items such as shipping, per diems, allowances, and more

Change Orders
- Re-engineered approval process for project revisions
- Allows for multiple pending change orders to exist at one time
- Provides differentiation between external and internal change orders
- Each change order can have its own Scope of Work, Misc. Items, Price Adjustments, Payment Terms, and Taxes

Avalara Tax Integration
- Accurately calculate applicable taxes for every billing line item by location, at no cost
- Enhanced option provides the ability to unlock advanced features such as adding tax codes to each product/item in their catalog

Enhanced Permissions & Security
- User Sign-In Policies – Enhanced password rules and session timeout settings
- Enhanced Sign-in and Server exception logs
- GDPR (General Data Protection Regulation) Compliance – Enforcement settings and rules to ensure security of customer data per EU regulations

Multiple Currency Support
- Create multiple currencies for Projects, Service Orders, and Purchase Orders

Use Tax
- Apply taxes to the Unit Cost of products
- Margins/markups can be inclusive or exclusive of use tax

Library & Catalog
- PSA data integration – Option to download product data and schedule product pricing updates directly from PSA
- Clone function – Generate a more accurate quote when adding items as Accessories or to Packages

Customer Portal
- Send client an "auto sign-in" link within an email notification sent through the Customer Portal
- Change "from" name on the email sent, as well as set "reply to" email for customers

QuickBooks
- Setting to include Project Number field in Job name
- Option to use Site Address on Estimates

Drawings
- Project Setting to default the Off-Page Reference shape in Visio to page number vs. page name
- Project Setting to assign layer color property to AutoCAD schematic wire block
- AutoCAD 2019 support

Mobile Install
- Full Notes field now displays in Mobile Install email notifications
- Documents and site images added to Mobile Install can now be synced to SI, providing centralized storage of project files

For more information contact **sales@d-tools.com** or call **1-866-386-6571**

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