Gold Support Webinar Series:

Projects

This webinar was created to provide an introduction to SI Projects with 30-40 minutes of feature introduction and demonstration followed by a Q&A period.

Session Topics

- Creating a Project
- Scope of Work
- Locations and Systems
- Bill of Materials
- Phase Difficulty
- Price Adjustments
- Proposal Report Package

Notes

Creating a Project

- Creating a D-Tools Project only requires two pieces of information:
  - Client Details
  - Project Name
- Other data can be added once the project is created
  - Site Address
  - Billing Address
  - Client Number (from a CRM)
  - Project Start/End Dates

Notes

ACTIVITY 1

Create a new project with a new client

1. Starting from the Project Explorer, click New → Project. The New Project Wizard opens.
2. To create a project, two pieces of information are required: a client and a project name. Click the Create Client button and select New. This opens the New Client window.
3. In the Navigate section, click Contacts. Then click New → New Contact.
4. In the New Contact window, start by entering a name, phone number and email address.
5. Next click Addresses and enter address information. Click Save and Close.
6. Now back in the New Client window, click Create as Client.
7. A message about overwriting Client and address information will pop-up. Click Yes. Then click Save and Close. The New Client window will close and the information entered will populate the appropriate fields in the New Project Wizard.
8. In the Project Name field, type a name for your project (something you will remember.)
9. Nothing else is required to create the project and open it for editing.
10. Finally, click Save to open your project.

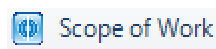
Notes

Scope of Work

- **Before building a Bill of Materials (BOM) we should create a scope of work**
- **A scope of work defines what the customer wants**
- **It provides a narrative that is missing from a simple parts list**
- **The scope of work becomes part of the proposal and describes the project**

ACTIVITY 2

Add a scope of work

1. From the Project Editor Home tab, click Scope of Work. 

2. In the Manage Scope of Work window there are two methods for adding a Scope of Work:
    a. You can type directly into the large text box.
    b. Or, under Format, you can select the radio button 'Scope of Work is in RTF format.' This allows you to attach a scope of work created in WordPad and saved in RTF format. The attached file will become part of the project.
3. When complete, click Save and Close.

Notes

Locations and Systems

- **Adding Locations and Systems helps us organize the BOM**
- **Our reports can show project data grouped by system or location**
- **We can filter project data by system or location to help us see the details**

ACTIVITY 3

Add locations to your project

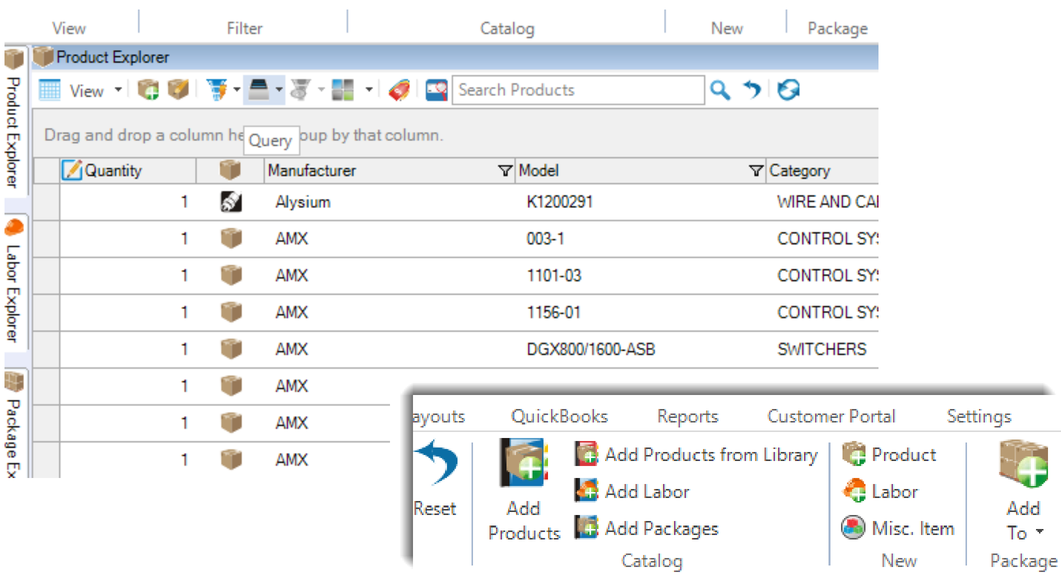
1. Starting with your project open in the Project Editor, click the Settings tab, then choose Locations.
2. To add locations from the list of locations, click Add → Locations. From the Add Locations window, check off location names and then choose Save and Close.
3. To create new locations of your own naming, click New → Location. Type a location name.
4. To create a Sub Location, select a location in your list, then click Add (or New) → Sub Location. Type it in or pick from the list.
5. When you are done adding locations, click Save and Close.

   Note: Add Systems by clicking on Systems in step one

Notes

Bill of Materials

- We have several methods for filling out our Bill of Materials
  - We can add Products
  - We can add Labor Items
  - We can use Packages
- The two main methods of adding items are:
  - Using the pop out menus on the left side of your project editor
  - Using the options across the project editor Home tab



Notes

Activity 4

Add products to your project

1. To add products to a project, start by selecting a location and system from the lists on the right side of the Project Editor window.
2. For quick access to a 'mini catalog', use the pop-out Product Explorer found along the left edge of the Project Editor window. Click it and it will open.
3. From this pop-out window you have access to a search box, Quick Filters, etc. Use them to search for products.
4. Select a product. Then click Add to Project. The product will be added to the location and system you designated in Step 1.

Activity 5

Add packages to your project

1. Just like adding products, start by selecting a location and system from the list.
2. Click on the Package Explorer along the left side. It will pop open.
3. Search for a package. Select one and click Add to Project.

Notes

Phase Difficulty

- Each phase has a difficulty percentage that defaults to 100%
- By adjusting this percentage, you can increase or decrease your labor budget in both hours and dollars
- When the issue is we have too many or too few hours, adjust difficulty
- When you only want to change the price of labor, adjust the Price/Hr. value
- Price/Hr. only affects price, difficulty drives hours which also impacts price

Notes

ACTIVITY 6

Adjust labor with Phase Difficulty Percentage

1. In your project, click Settings, then click Phases. The Manage Project Phases window will open.
2. Click on the Rough-in Phase on the left. The details of the selected Phase are now shown.
3. Find the Base Labor row and scan across to the Difficulty (%) field. By default, it is 100%. This means that for every hour assigned to a product in this Phase, one hour of labor, at the defined rate, is added to the project.
4. To increase your Rough-in labor by 10%, change the Difficulty to 110%, an increase of 10%. Do this now. After the adjustment, this means that for every hour assigned to a product in this Phase, 1.1 hours of labor, at the defined rate, is added to the project.
5. This change, if saved, will immediately reflect an increase of 10% for labor in the Rough-in Phase. This increase will be in hours and dollars.

   Note: *Setting Difficulty (%) to a value less than 100% will reduce the hours and dollars.*

Notes

Price Adjustments

- Price Adjustments come in three types:
    - Product – as a percentage of equipment
    - Miscellaneous Parts – as a percentage of equipment
    - Labor – as a percentage of labor
- Price adjustments can be positive or negative
- Product adjustments work well for equipment discounts
- Miscellaneous Parts adjustments can account for consumables
- They are reflected in the summary section of client reports

Activity 7

Adjust total Product and/or Labor pricing with Price Adjustments

1. In your project, click Settings, then click Price Adjustments. The Manage Project Price Adjustments window will open.
2. Adding a positive or negative number in any of the adjustment fields will increase or decrease total pricing by that percentage. These are global for Product, Miscellaneous Parts, and Labor.
3. Adjust a value and then run a Proposal report. Look at the Project Summary to see the changes.

Note: *Price Adjustments can be renamed in reports to be used for other expenses (think freight).*

Notes

Proposal Report Package

- D-Tools offers many reports that together can produce a complete proposal
- You can run the reports separately or in a Report Group
- Report Groups allow you to run several reports like they are one
- A typical Report Group for a proposal package might include:
  - Cover Page
  - Company Profile
  - Scope of Work
  - Proposal Summary (Location or System)
  - Line Item Detail or Proposal
  - Contract

Activity 8

Run a Proposal report

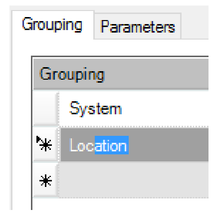
1. Click Reports → Client.
2. Choose a Proposal report (Notice there are nine standard versions.)
3. Make sure to click the '+' next to the report name and choose a definition.
4. Double-click the definition.

Notes

ACTIVITY 9

Create and run a Report Definition

1. From the main SI window click Start → Reports → Manage Reports.
2. In the list of reports, click the '+' next to the Client Reports category to expand the list of client reports.
3. Find Proposal With Images. Right-click on this report and select New → Report Definition.
4. In the Report Definition window, type a Description like '[Your Initials] - By System By Location – No Cover Page.' This will be the name of the Report Definition in the list.
5. Now, on the Grouping tab type 'System' on the first line and type 'Location' on the next line. The results should look like this:

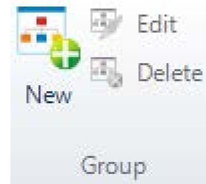


6. Click on the Parameters tab and check the Hide Cover Page option.
7. Click Save.
8. To run this report definition, return to the Project Explorer. Use the Quick Access menus across the bottom of the window (Projects → Projects.)
9. Select your project from the list. Click Reports → Client Reports.
10. The Project Reports window opens. Click the '+' next to the Proposal With Images report.
11. Find you report definition and double-click it. Your report definition will run.

Notes

ACTIVITY 10

Create and run a Report Group



1. From the Report Explorer (Start → Reports → Manage Reports) find the Group section and click New.
2. The Add Report Grouping window opens. Type a Name and Description for your report group like '[Your Initials] – Proposal Report Group.'
3. In the Reports list on the left, click the '+' next to Client Reports.
4. Now add the Cover Page report by checking the box to the left of the report name.
5. Add the Scope of Work (see step 4.)
6. Click the '+' next to the report called Proposal Summary. Then check the box next to the 'By System' definition.
7. Next add the Proposal With Images report using the definition from the last activity:
   a. Click the '+' next to the report called Proposal With Images.
   b. Then check the box next to the name of the definition you added.
8. Last, add the Contract report (see step 4.) Click Save.
9. To run this report group, return to the Project Explorer. Use the Quick Access menus across the bottom of the window (Projects → Projects.)
10. Select your project from the list. Click Reports.
11. From the Reports tab choose Other.
12. The Project Reports window opens. Scroll to the bottom and expand Report Groups.
13. Find your report group and double-click on it. The report group will run.

Notes

Next Steps

- This session serves as an introduction to Projects
- For more information about projects you can sign up for our upcoming webinars:
  - Revision Management
  - Project Reporting and Customization
- Any questions?

Notes

Training content complete

- Support Resources Available
  - D-Tools Application Home Page Links
    - Documentation – open the Support Wiki
    - Support Ticket – open the web page to create a support ticket
    - Chat With Us – Launches Chat Support
  - From any D-Tools software interface, click Learn More
    - Found in the upper-right corner
    - Launches the Support Wiki
  - Open the Support Wiki directly at support.d-tools.com
  - Send an email to support@d-toolshelp.com
  - Call 866.386.6571

Notes