

Gold Support Webinar Series:

Getting Started with the Catalog

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

Session Topics

- Catalog Navigation and Concepts
- Core Catalog Creation
- Mass Update Catalog Data
- Accessories
- Packages

Notes

Catalog Navigation

- **The Catalog is divided into three sections**
 - **Products**
 - **Labor Items**
 - **Packages**
- **Navigating your catalog is easier with Quick Filters and the Search box**
 - **Quick Filters – Allow you to easily filter your results**
 - **Search – Type search words to filter data**
 - **Search Fields – control fields to be included in search results**

ACTIVITY 1

Experiment with Quick Filters

1. From the Home tab of the Product Explorer click Quick Filter. While there are several options, Manufacturer or Category are both useful choices. Pick a filter to see further options.
2. After selecting a filter, click one of the check boxes within the filter and then Apply.
3. The Catalog view has been filtered to reflect your choice. Reset will remove the filter.



Notes

Catalog Concepts

- **Category Types**
 - **Equipment**
 - **Speakers**
 - **Wire**
 - **Labor**
- **Most products will be identified as “Equipment”**
- **Each Category Type has unique properties**
 - **Equipment/Speakers: dimensions, weight, power, BTU, I/O’s**
 - **Speakers: dispersion**
 - **Wire: diameter, start/end terminal, bulk wire (t/f), length**
 - **Labor: fixed price, phase based rate, hours, etc.**

Notes

Core Catalog Creation

- **Create your Core Catalog**
 - **Enter products manually and review core data fields**
 - **Review Standard Items vs. Calculated Items**
 - **Add products from the D-Tools Library**
 - **Import products from CSV (spreadsheet)**
 - **Useful for importing price sheets**
 - **Update products from the Library**
 - **Add bulk cable items**
 - **Add labor line items**

Notes

ACTIVITY 2

Create a product manually in the Catalog (Standard Pricing)

1. Click Start → Catalog → Manage Products.
2. From the Product Explorer, click New.
3. Choose a manufacturer from the Manufacturer list.
4. In the Model field type a name like "Test [Your Initials] Equipment."
5. Select a Category.
6. Click on the Description Icon.
7. Type a Short Description for your item.
8. Click on the Price Icon.
9. Choose the Standard radio button to enter standard pricing information.
10. Add a value in the MSRP field.
11. Click in the Unit Cost field and enter a value (you may see more than one row of price types below the pricing headers. Typically, the top row is your default pricing).
12. To set the Unit Price for your item, you can type a value in the Unit Price field, or you can type an expected Margin or Markup in the adjacent fields to automatically calculate the Unit Price.
13. Adding labor requires two steps:
 - a. First select a Phase which determines the labor rate.
 - b. Second, add Labor Hours to determine installation time.
14. To see the results of your pricing (equipment and labor) click on the View link below the Estimated Installation Price header.
15. Step through other tabs and fields and populate values.
16. Now click Save and Close.

Notes

ACTIVITY 3

Create a product manually in the Catalog (Calculated Pricing)

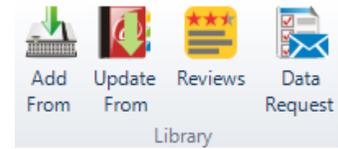
1. Follow Steps 1 – 8 from Activity 2 above.
2. After clicking on the Price Icon, choose the Calculated radio button to enter calculated pricing.
Note: Calculated items have many options for setting Unit Cost and Unit Price. When calculation settings are applied, a Formula is written in plain text to help you understand the results. Be aware that the value for Unit Cost can be derived from Unit Price and vice versa.
3. First, set the Unit Price formula. On the right side of the dialog box, find the Unit Price section:
 - a. To the right of the Source label choose the Total radio button. From the dropdown menu next to Total, choose Product Price.
 - b. In the Operation dropdown choose Multiply Percentage.
 - c. Type a percentage in the Value textbox. Try something easy to understand like 50%.
Note: See below the filter section, your formula is being written.
 - d. In the filter section, you can choose to filter the Source data for your formula to the Current Location, Current System or Current Phase. Filters can also be limited to values within an Assigned Change Order. Any combination of filters is allowed.
4. Now set the formula for Unit Cost. On the left side of the dialog box, find the Unit Cost section:
Note: We will set Unit Cost as a percentage of Unit Price.
 - a. In the Source area, choose the Product Unit Price radio button.
 - b. For Operation choose Discount Percentage and set a Value of 50%
5. A calculated Equipment Item cannot have direct labor but you can assign a Phase.
6. Continue adding details to your item as necessary. Then click Save and Close.
Note: Calculated items cannot be changed back to Standard pricing after saving.

Notes

ACTIVITY 4

Add a product from the D-Tools Library

1. From the Product Explorer, find the Library group (Home tab) and click Add From.



2. The Add Products from Library window opens.
3. In the Manufacturers list on the left, choose a name or enter search text to find a Manufacturer.

*Note: If the manufacturer is a partner ( icon), you may see an information page about the manufacturer. If so, click on the  **Download Products** icon. This will load a list of products.*

4. To download a product from those listed, click the download  link adjacent to the item.
5. The chosen product has now been added to the Catalog. Click the 'X' in the upper-right to close the window.
6. Back in the Product Explorer, type the model of the product in the search box to find the item.

Notes

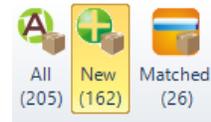
ACTIVITY 5

Import products from a CSV file

1. Start by creating a simple product spreadsheet in Excel:
 - a. Add at least two columns: Manufacturer and Model.
 - b. Cost and Price columns are typically useful as well.
 - c. Add a few items that include data for each column you created.
 - d. Save the file in CSV format.



2. From the SI Product Explorer click Tools → Import.
3. Find the CSV file you created earlier, select it and click Open.
4. The Map CSV File dialog will open. Verify that the columns from your CSV are mapped to SI fields. Click Map next to any fields that need to be mapped and choose the appropriate field.
5. Click Next, then click Finish. The file will be processed and the Import Editor will open.
6. Next check the filter section. The products you are importing should be listed when you click New. If not, stop here. Ask for assistance.
7. Finally, click Import → New and in the Import dialog, click OK.

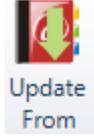


Notes

ACTIVITY 6

Update products from the Library

1. Select the products you imported from CSV (Try a standard Windows Shift-Click or Ctrl-Click to make your selection.)
2. From the Product Explorer Home tab select "Update From" in the Library section.
3. SI will now attempt to match your products with items in the Library. One of three possible outcomes will be the result:
 - a. A dialog opens showing the products with additional data available.
 - b. A message stating the products are already up-to-date.
 - c. A message stating the products were not found in the Library.
4. If additional data is found, simply select Update and Close. The products are now up to date.



Notes

ACTIVITY 7

Create a labor item

1. Click Start → Catalog → Manage Labor.
2. From the Labor Explorer, click New.
3. Choose 'Your Company' from the Manufacturer list.
Note: Click New next to the Manufacturer list to create one
4. In the Model field type a name like "Test [Your Initials] Labor."
5. Select 'Labor' as the Category.
6. Add a subcategory if you like.
7. On the Description tab, add a description if you like.
8. On the Price tab make the following selections:
 - a. Select the Variable check box.
 - b. Choose the Use cost and price from phase radio button.
 - c. Select a Phase.
 - d. Enter a number for Labor Hours (the number can include decimal values.)
 - e. Now click Save and Close.

Notes

Mass Update Catalog Data

- Entering and importing Catalog data is great start
- How do we fill in the data gaps?
 - Enter additional product data manually or use CSV export/import
 - Mass Update
- Mass Update allows us to:
 - Update the margin for a selection of products or the entire Catalog
 - Add a Preferred Vendor for an entire product line
 - Change fields like Phase, System, Category, Bulk Wire, or Approved

ACTIVITY 8

Use Mass Update to set product margin

1. Click Start → Catalog → Manage Products.
2. From the Product Explorer, make a selection (try Quick Filters to select an entire Manufacturer).
3. Right-click over your selection and choose Mass Update -> Selected.
4. In the Mass Update Products dialog box, select Margin from the Price section and click Next.
5. In the Margin field set a value and click Save. Click OK to the pop-up and then click Close.

Note: For the margin calculation to work, products in the selection must have a value for Unit Cost.

Notes

Catalog Accessories

- **Accessories are simply other Catalog Items**
- **Accessories can be Products or Labor Items**
- **Accessory Rules**
 - **Products can have accessories**
 - **Accessories cannot have accessories**
- **Accessory Framework**
 - **Create an outline describing the typical accessories associated with a category of product**
 - **Speakers have brackets and wire**
 - **Equipment racks have rack bases, lacing bars, fan tops, etc.**
 - **TVs have mount options, HDMI cable options, HD Base-T options**

Notes

ACTIVITY 9

Add accessories to a product in the Catalog

1. From the Product Explorer, find one of the items created earlier (use the search box.)
2. Double-click on the chosen product to edit it.
3. Click on the Accessories option.
4. Click Add Products. 
5. Try using the search box to find an HDMI cable (type 'HDMI Cable').
6. Now click the **Add** button, not the **Add and Close** button.
7. Next, select a different HDMI cable.
8. This time click Add and Close.
9. Your results should look similar to this:

	 Quantity	 Prompt	 Recommend	 Non-Billable	Manufacturer	Model
	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DTI	HDMI-2M
	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DTI	HDMI-1M

10. Uncheck the Recommend check box for one of the cables. This sets one as the default but you will still be prompted for both when adding the parent item to a project.
11. Now click Save and Close.

Notes

Packages

- Packages are like wrappers around products and labor items
- Packages have a name and description
 - Add products and labor items
 - Treat packages like an item or assembly
- Packages include options for product and labor discounting
- Package contents can be displayed or hidden in client reports
- Examples include:
 - Phone/Data Wall Plate
 - 7.1 Surround Sound Wiring Package
 - Network Headend
 - Equipment Rack Package
 - Large Format Wall Mount TV Installation Package

Notes

ACTIVITY 10

Create a prewire package

1. Click Start → Catalog → Manage Packages.
2. From the Package Explorer, click New.
3. In the New Package window, type a name and description for the package:
 - a. Use a name like “[Your Initials] – Prewire Package.”
 - b. The description should describe the contents of the package.
4. In the Options section, check all boxes except Prompt Accessories. 
5. Under the Navigation section, choose Items.
6. In the Items section choose Add Products.
7. The Add Products window opens. Type ‘cable’ in the search box. This should filter the list to show only cables.
8. Add a few cable choices by selecting a product and clicking Add. When adding your last item, click Add and Close.
9. Now click Add Labor.

Note: Adding labor here allows you to have a single labor item to drive the labor cost instead of each cable adding to the labor budget.
10. In the Add Labor window, choose the labor item you created earlier. Click Add and Close.

Note: You can also create another labor item called “Wire Pull” and use that.
11. Last, click Save and Close.

Notes

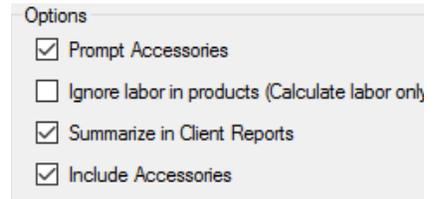
ACTIVITY 11

Create a room solution package

1. From the Package Explorer, click New.
2. In the New Package window, type a name and description for the package:
 - a. Use a name like "[Your Initials] – Room Solution Package."
 - b. The description should describe the contents of the package.

Note: If you need ideas for the type of package to create, double-click on an existing package and look at how it is built.

3. In the Options section, check all boxes except 'Ignore labor in products...'
4. Under the Navigation section, choose Items.
5. In the Items section choose Add Products.
6. The Add Products window opens. Try using the search box or a Quick Filter to find products. Add products to your package. Keep in mind, some products might already have accessories like HDMI cables or network patch cables. When adding the last item, click Add and Close.
7. Last, click Save and Close.



Notes

Next Steps

- This session serves as an introduction to the Catalog
- For more information check out [Getting Results with SI](#)
- 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