



System
Integrator **SI5.5**

**INSTALLATION &
ADMINISTRATION
GUIDE**

SI 5 Installation and Administration Guide

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Welcome to D-Tools SI5!

Welcome to the growing family of **D-Tools System Integrator (SI)** users! I want to thank you for putting your confidence in D-Tools software. We know that D-Tools SI5 will be a powerful enhancement to your system integration business. D-Tools SI is the leader in complete system integration software and has been proven by thousands of system integration companies that are already using it to more effectively design, engineer, document, estimate, sell, install, and manage their low voltage projects. In fact, many companies have seen the software pay for itself in the first project through increased efficiencies throughout the company.

This latest version of D-Tools SI has been extensively tested on various computer platforms, but it has not been tested on the most important one... yours. Give it a try, run through a sample project, test it, and by all means, please don't hesitate to contact us to report any issues or questions so we can continue to improve the software. You will receive free in-version updates to our product over time as we continue to hone the product and add even more enhancements. We want you to be successful with this product. Feel free to contact us with ideas and thoughts about the program. Some of our best enhancements have come from users just like you.

While D-Tools has been designed to be simple to use, it is also a very deep and full functioned software product. I have included some ideas you can use to make a smoother transition from your previous design, estimating and business management procedures to D-Tools SI:

- Take a moment to peruse the user guide included with the software before jumping right in. This guide is full of tips, tricks, and detailed information that will help you get the most from the software.
- Your corporate product database is one of your most important business assets. Take the time to prepare your database by following the steps outlined in the Manage My Product Data (MMPD) interface. MMPD was specifically designed to easily allow you to add, edit and enhance your product data. In addition don't forget to make frequent backups of your D-Tools SI database and projects.
- Open one of the sample projects included in your software. See how we have created packages, accessories and miscellaneous labor costs. Run all the reports you have available with this demo project. Finally, take a small project that you have completed in the past, one that is successful and you are happy with. This will allow you to get familiar with the program and begin to create a custom database of your most used products.

I highly recommend product training. Although not a requirement, product trainings are reasonably priced and are offered regionally throughout the year. We offer a number of regional, on-site or web based trainings. Trainings are an excellent way to shorten the learning curve and quickly get up to speed. For more information about trainings visit:

<http://www.d-tools.com/index.php/support/training-sub>

It is our hope to always keep product data current and free for you to use. You can help in this regard by encouraging the manufacturers and reps you deal with to join the Manufacturer Vantage Point Partner Program. Please have them e-mail mvp@d-tools.com for more information.

Thank you again for your purchase. If you take the time to implement the software into your everyday business practices, I know that you will join the growing group of companies using System Integrator who are seeing tremendous results! Please contact me if I can be of any additional help.

Sincerely,

A handwritten signature in black ink, appearing to read 'Adam Stone', with a long horizontal flourish extending to the right.

Adam Stone

President

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Phone: 866.386.6571, Option 5
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About This Guide

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This document along with the SI 5 Tutorial and the User Guide will help maximize the return on your D-Tools investment. SI 5 is a very feature rich product. If you have specific questions, scan the Table of Contents or look for keywords in the index. If you find we have left out something, please let us know. We are releasing this document in PDF format so that it may be more easily updated as SI 5 continues to evolve. Please give us your feedback. We want to know how we can further improve both our products and our documentation.

Thanks,

The SI5 Documentation Team

System Requirements

Hardware requirements

2 GHz Pentium 4 (Dual Core Processors recommended)

1 GB RAM (2 GB is recommended)

CD drive (DVD drive is recommend for future compatibility)

XGA (1024x768) or better display device (Dual Displays recommended)

OS Requirements

Microsoft Windows XP with SP2 or later

Microsoft Windows Vista

Microsoft Windows 7

Microsoft Server 2003

Microsoft Server 2005

Will work with both 32-bit and 64-bit operating systems running on a PC.

Windows Required Components

Windows Installer 3.1 (this likely already on your machine but if not [Click here to download](#))

.Net Framework 3.5 SP1 (Included on CD, will be installed during SI 5 install)

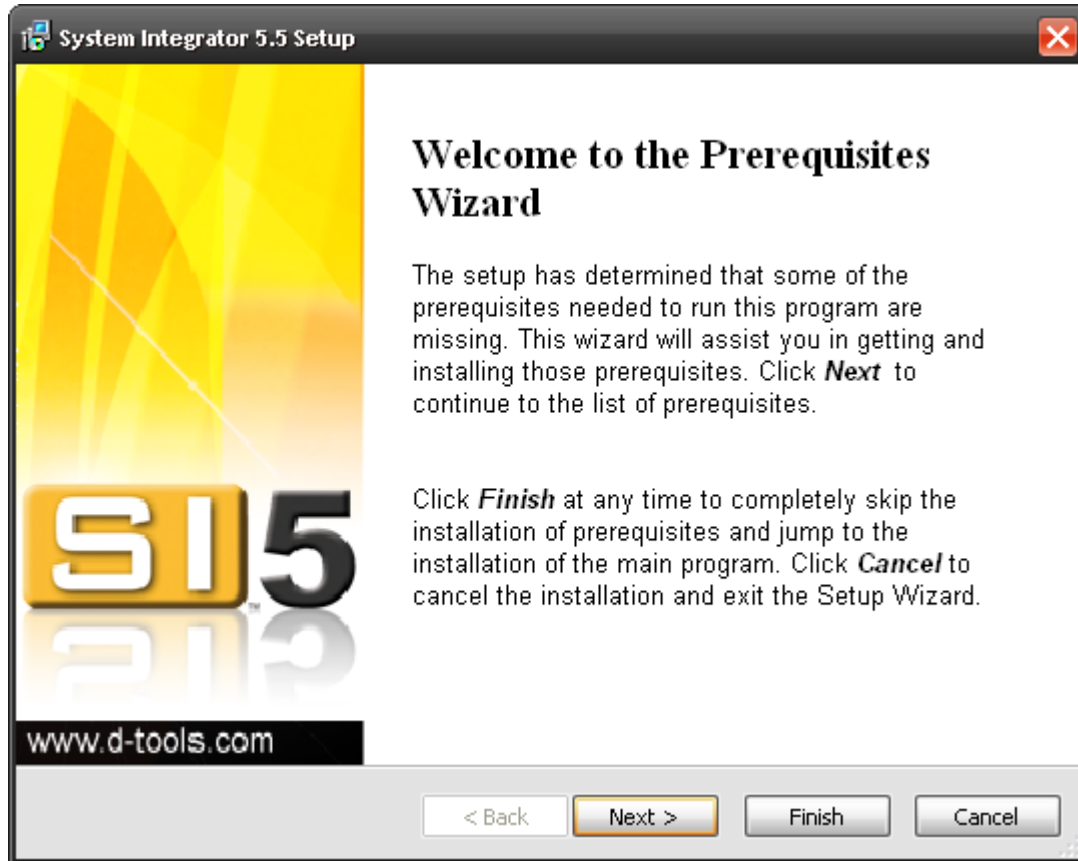
SQL Server Compact 3.5 SP1 (Included on CD, will be installed during SI 5 install)

Installing SI5.5 Estimator

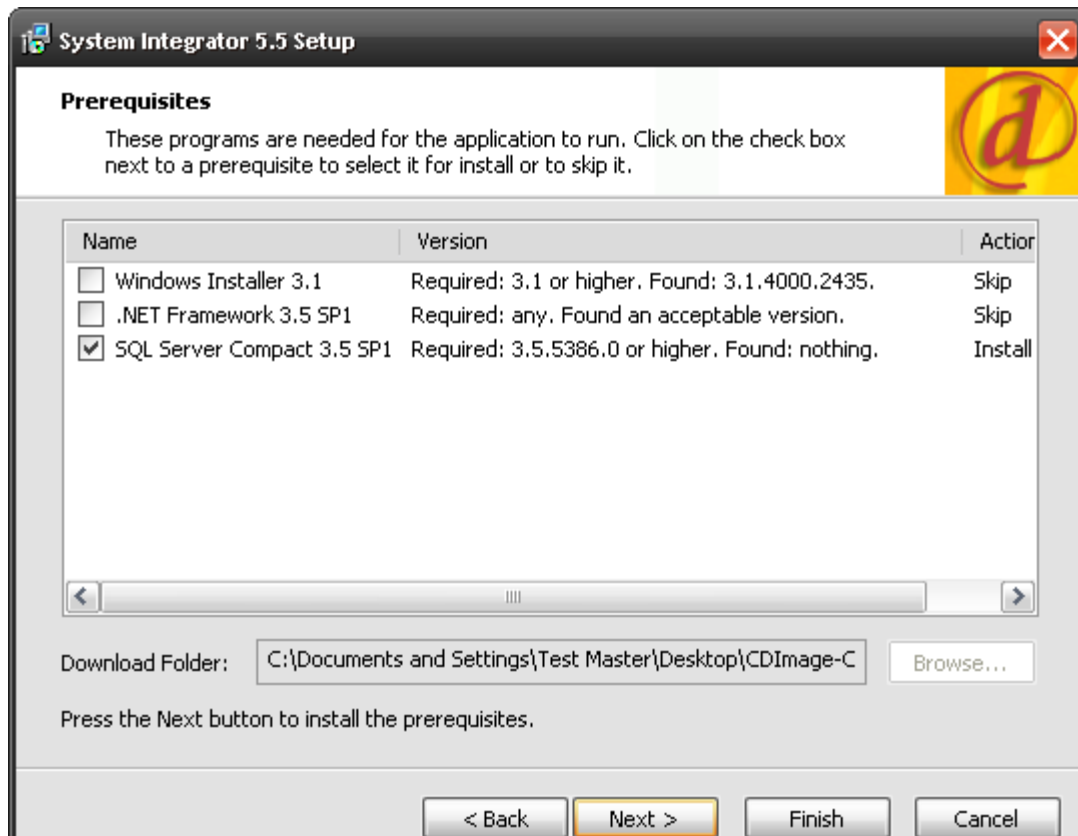
- 1) Insert disc into CD or DVD drive.
- 2) If the installation process does not automatically begin, browse to the CD drive and Double-click the *Install.hta* file. The D-Tools System Integrator 5.5 install from will open. Choose **Install System Integrator 5.5 Client**.



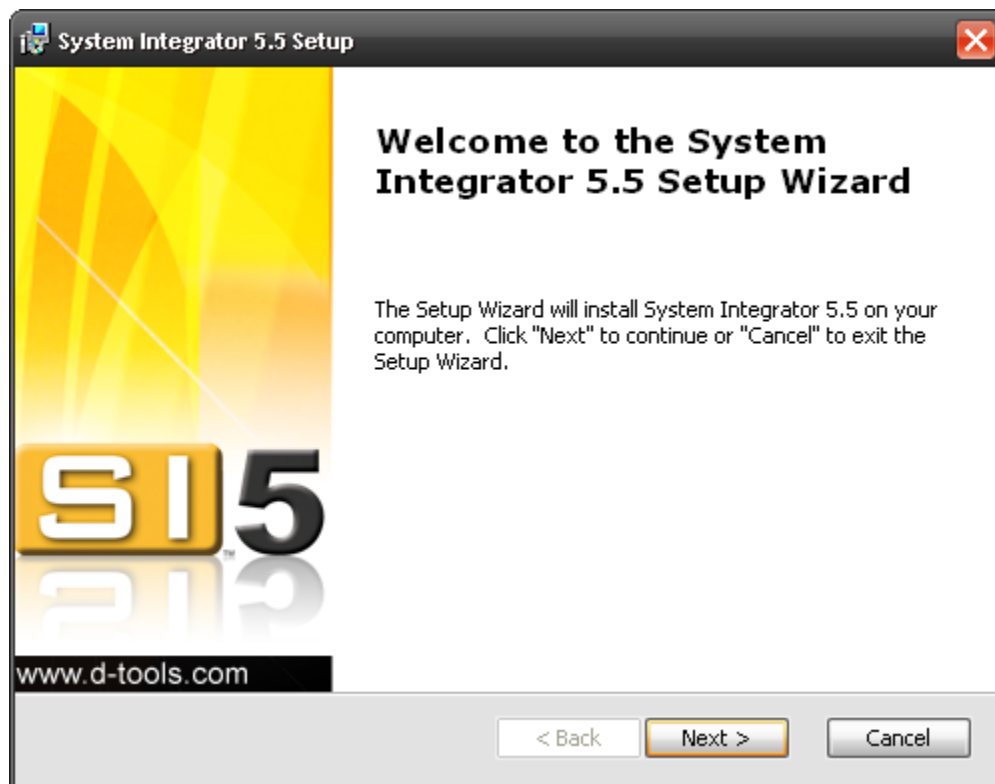
- 3) The installer will determine if all prerequisites are installed. Click **[Next >]**.



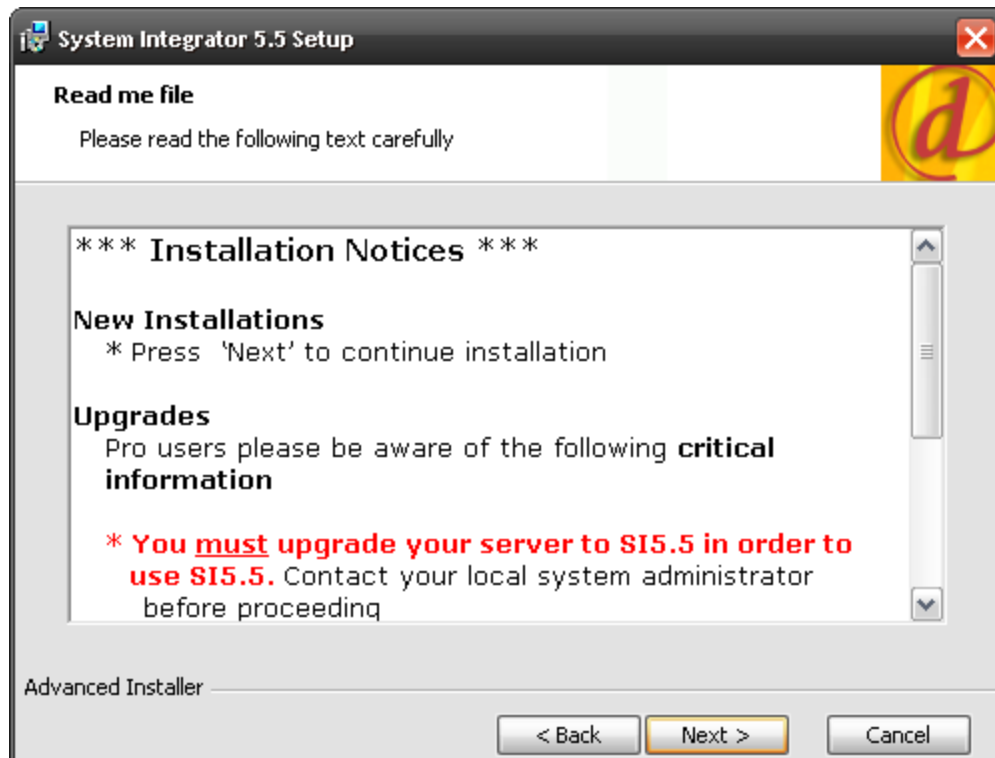
- 4) Click **[Next >]** to install any missing prerequisites. Follow the onscreen instructions for the third-party installs.



5) Click **[Next >]** to proceed.



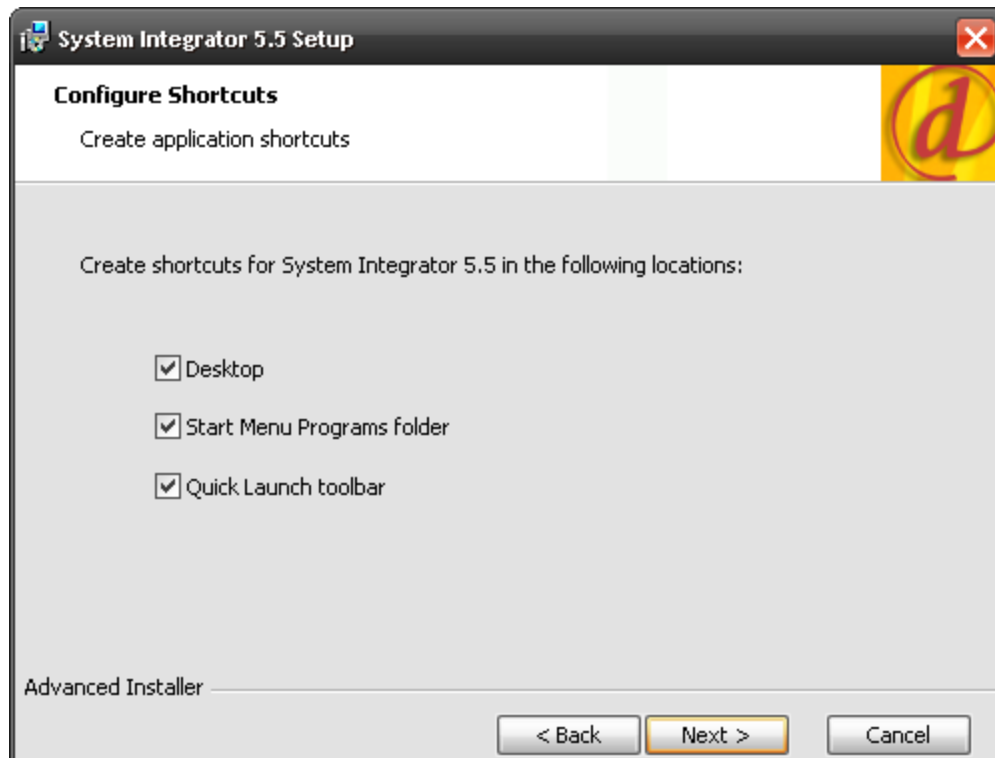
6) Read the Read Me file and then click **[Next >]**



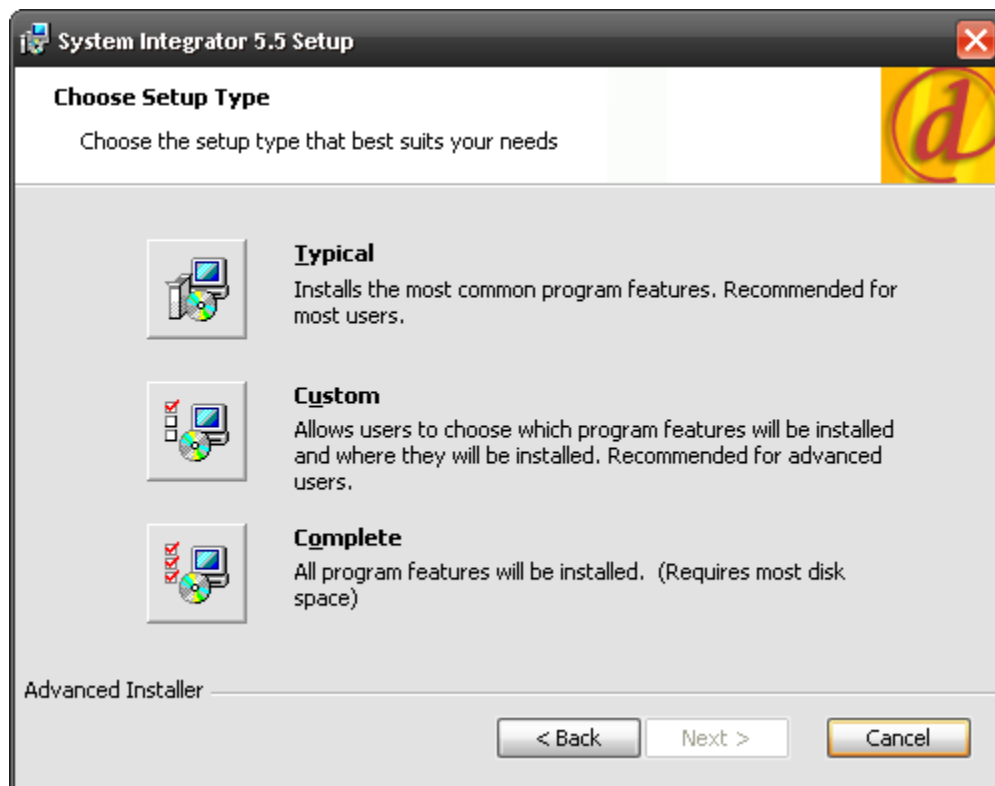
7) Read and Accept the End-User License Agreement and then click **[Next >]**



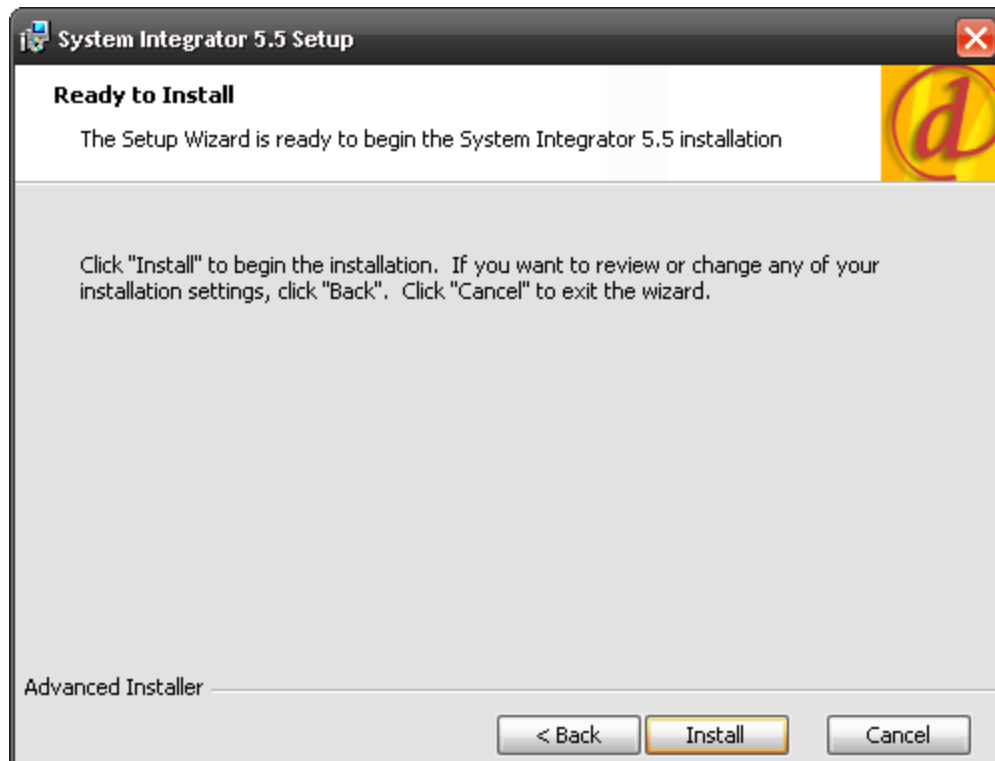
8) Click **[Next >]** on the Configure Shortcuts step:



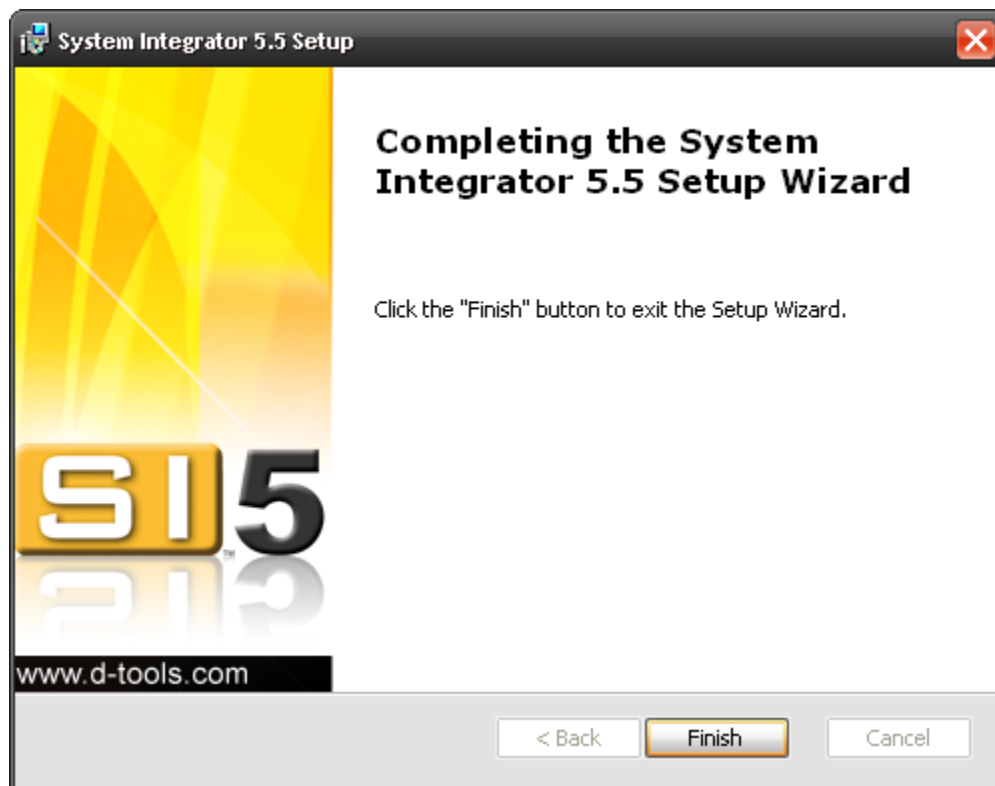
9) We recommend doing a **Complete** install.



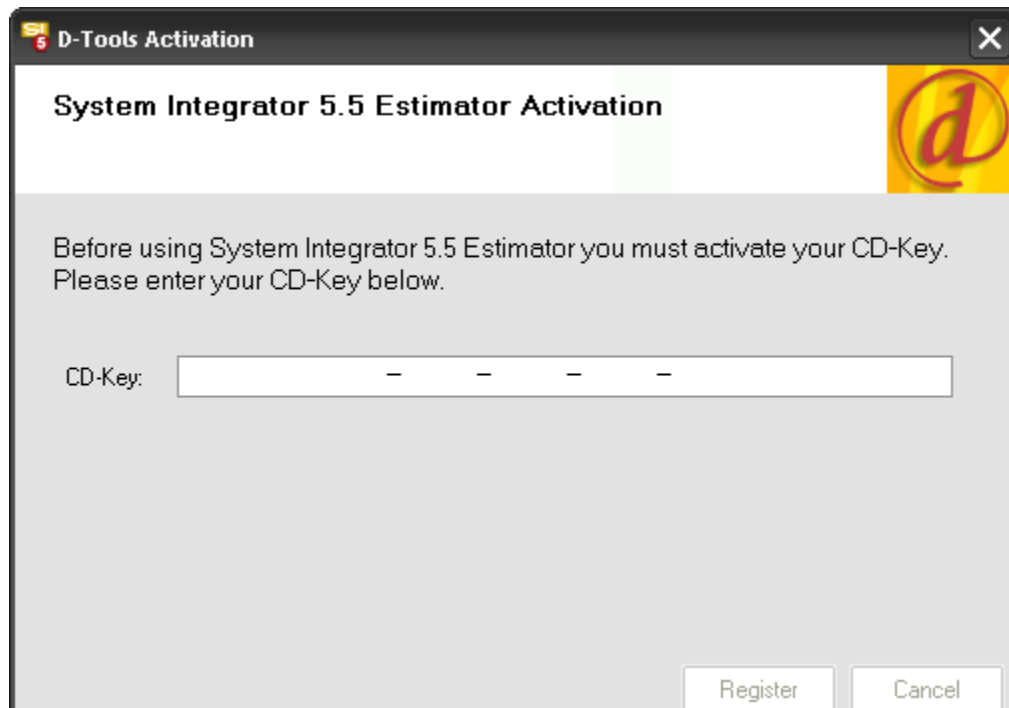
10) Confirm your decision to install by clicking **[Install]**



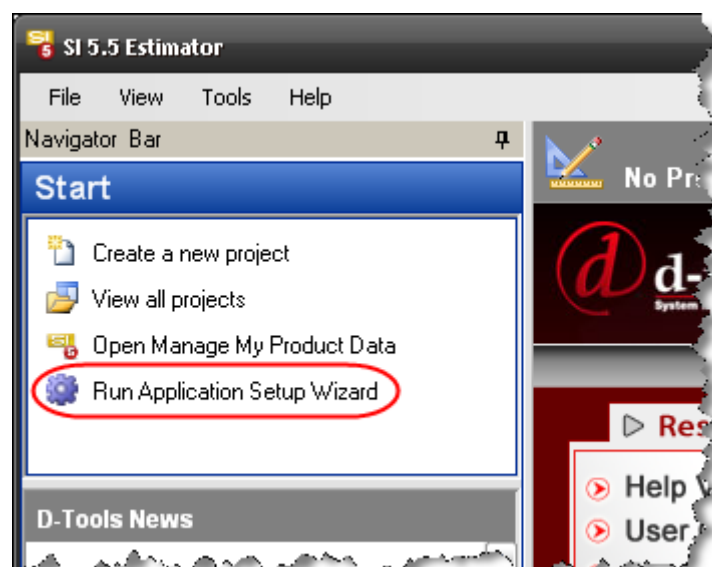
11) When the install is completed, click **[Finish]**



12) You will be prompted to enter your CD Key. You should have received an email from D-Tools with this information.



13) Launch SI 5 and click the Run the Application Setup Wizard link.

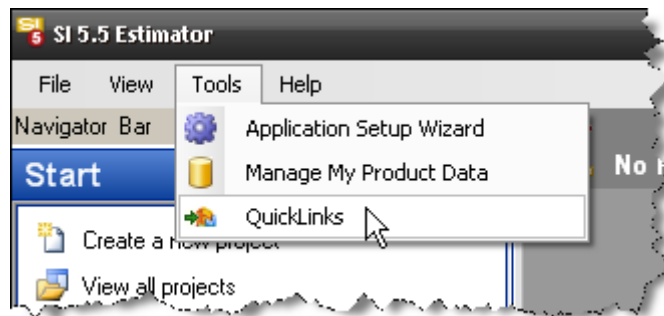


Configuring QuickLinks

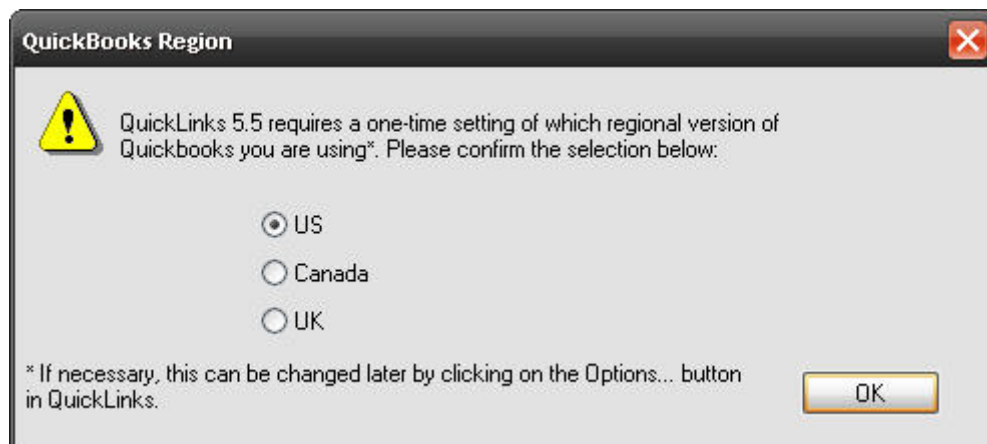
If you have purchased a QuickLinks license and if you installed using the “Complete” option, QuickLinks was installed. QuickLinks is our interface to QuickBooks and is an additional, optional license. QuickBooks must be installed on the machine where you intend to use QuickLinks. The following steps show how to configure QuickLinks for use on Client installs.

You may see QuickLinks referred to as LinkTools or as LinkTools-QuickBooks in some of our documents and videos. They are the same thing.

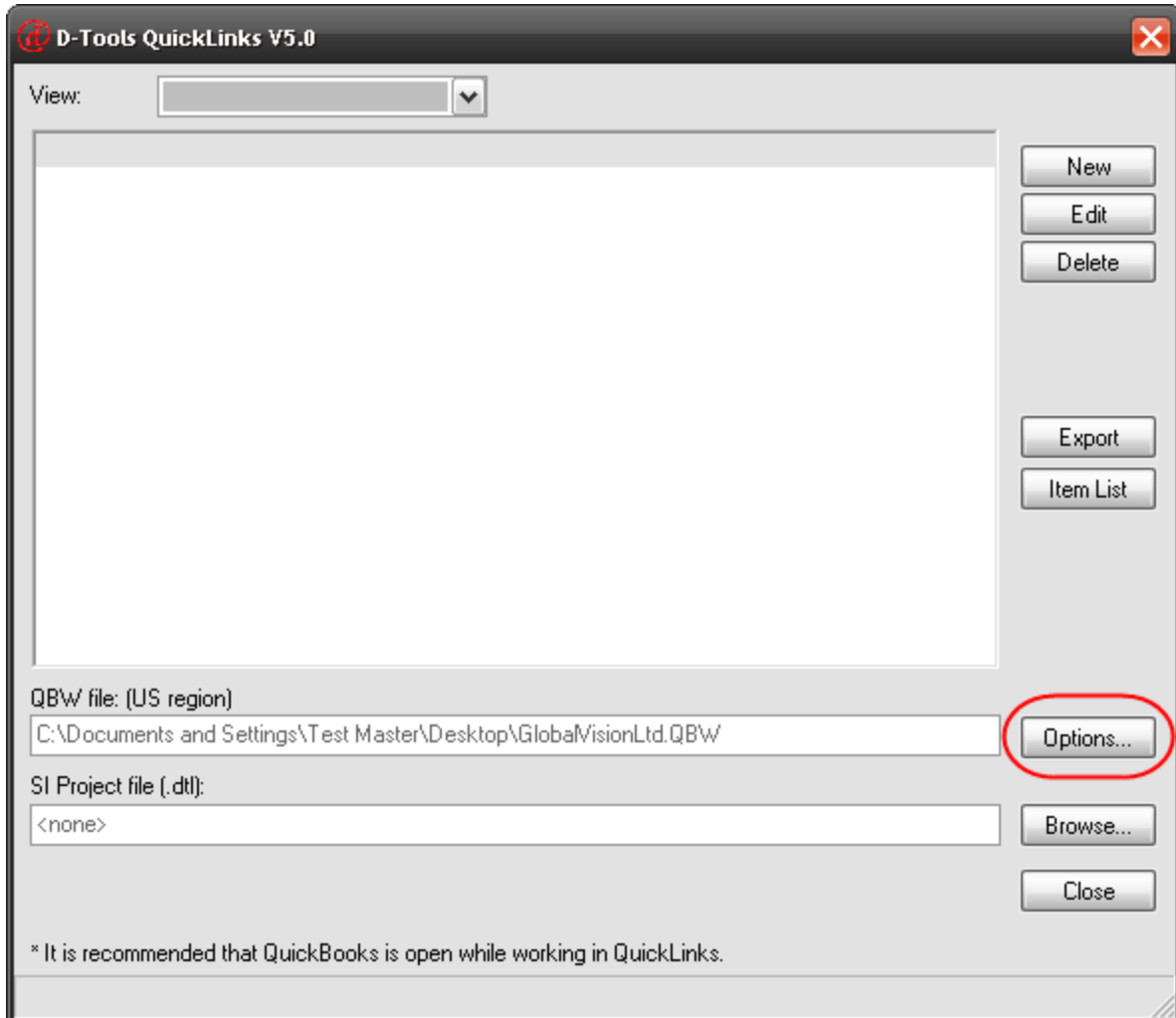
- 1) Open QuickBooks and login as “Admin” in Single User Mode. This is necessary to make the initial connection between SI 5 and QuickBooks. You do not need to be logged in as “Admin” to use QuickLinks in the future
- 2) Open SI 5 and login.
- 3) Select Tools->QuickLinks



- 4) You will be prompted to select your region:



- 5) The D-Tools Quicklinks form will open. Click the **[Options...]** button:



- 6) The following form opens. Use the **[Browse...]** button to navigate to your QuickBooks company file and select your defaults. When finished, click **[OK]**. For details on the “Item Input Mask”, see the SI 5 User’s guide.

The screenshot shows the "D-Tools QuickLinks Plus V5.0 Options" dialog box. It has a title bar with a close button (X). The main area contains several settings:

- "QBW File path:" followed by a text field containing "C:\Program Files\Intuit\QuickBooks 2006\D-Tools, Inc..QBW". To its right are "Browse..." and "OK" buttons.
- "New Item Default Type:" followed by a group box containing three radio buttons: "INVENTORY" (selected), "NON-INVENTORY PART", and "SERVICE".
- "Item Input Mask:" followed by a long text field containing "MMMMMMMMMMMMMMMMMMMMMMMMMM:00000000000000000000000000000000".

Below these fields is a note: "*** In Input Mask type M for Manufacturer and O for Model." At the bottom are three checked/unchecked options:

- ☒ Add Package Name to Description in Invoices and Estimates?
- ☐ When creating Estimates and Invoices display Misc. Parts and Equip +/- on separate line items?
- ☐ When creating Estimates and Invoices use Client Description if available?

A "Cancel" button is located at the bottom right.

- 7) Click the **[Browse...]** button and browse to one of your project files. If you do not have any project files created, create a quick project for this step. No data need be in the project for this step:



QBW file: (US region)

C:\Documents and Settings\Test Master\Desktop\GlobalVisionLtd.QBW

Options...

SI Project file (.dll):

<none>

Browse...

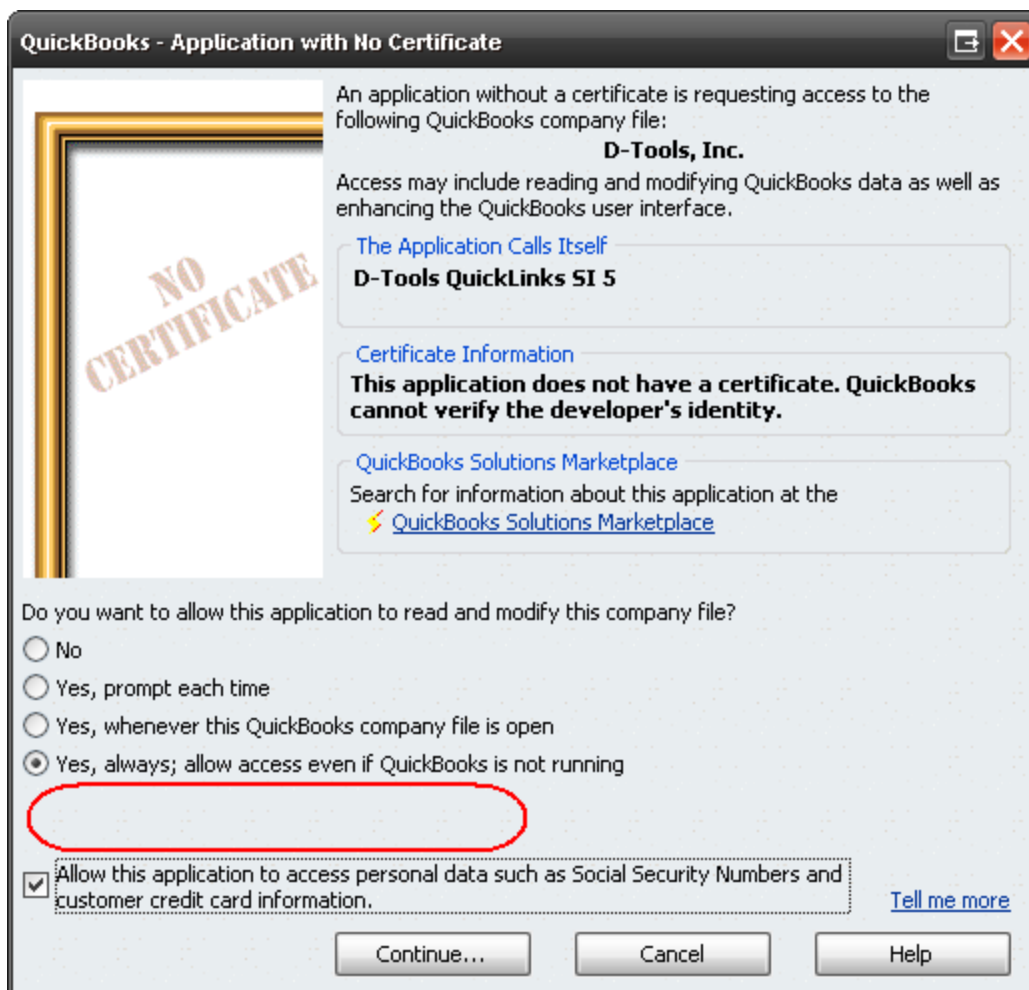
Close

* It is recommended that QuickBooks is open while working in QuickLinks.

- 8) Click the **[Item List]** button:



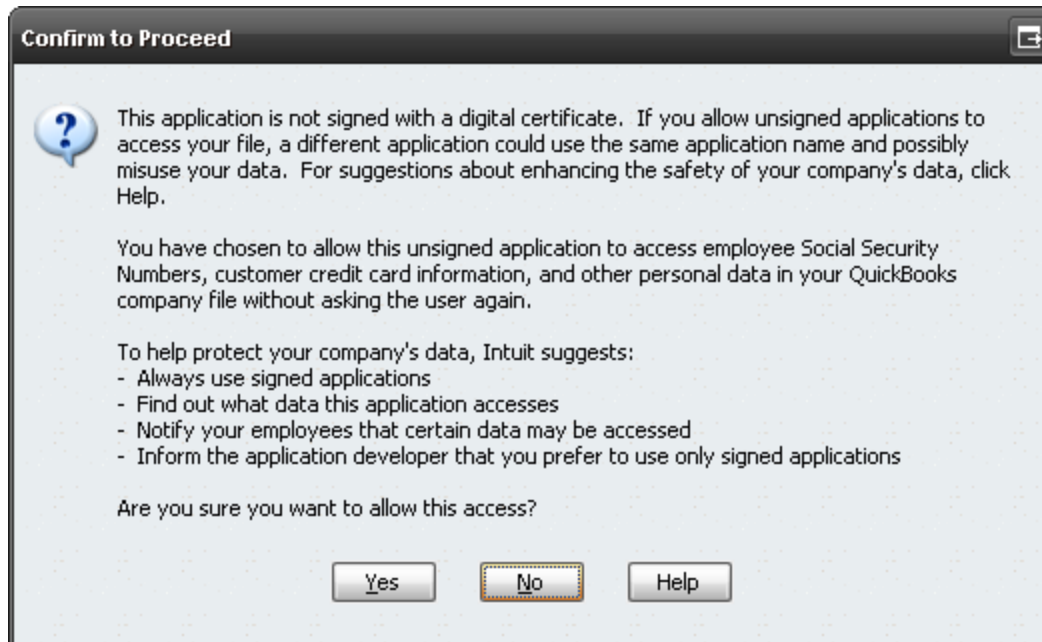
- 9) If the QuickBooks window does not gain focus automatically, click it on your Task Bar. The following window will be open. Click the “Yes, always; allow access even if QuickBooks is not running” radio button and click the “Allow this application to access...” checkbox.





You may have the option to select a "Login as" user on this form where the red shape is. If you have this field, choose "Admin" from the dropdown.

10) Click **[Continue...]**. You will be prompted to allow access:



11) Click **[Yes]** and then click **[Done]** when prompted:



QuickLinks is now configured and ready to use. See the QuickLinks section of the SI 5 User's Guide for details on using QuickLinks.