

Release 4.0.611 Guide



Quantify Release 4.0.611 is now available for update. This guide contains detailed information for the Features and Enhancement available through this release.

If you have any questions, whether concerning these items or any other aspect of Quantify, please contact support@avontus.com. We are happy to be of service.

Features

- Last Sunday of the Month Billing Cycle for Arrears and First Advance, then Arrears Billing Method
- Override the next invoice date when billing arrears
- Import part quantities into shipments
- Additional Charges with negative values as Credits
- Synchronizing Invoices with Negative Totals (Credits) with QuickBooks
- Displaying Additional Charge Values on Shipment Reports
- Next Inspection Date in Product Pivot Report for Serialized Parts

Enhancements

- Inspection date added to product Pivot for use with serialized parts
- Negative values can be entered for Additional Charges creating a credit
- Invoices with negative totals can now be synchronized with QuickBooks
- Option to display additional charge values on shipment reports

Bug Fixes

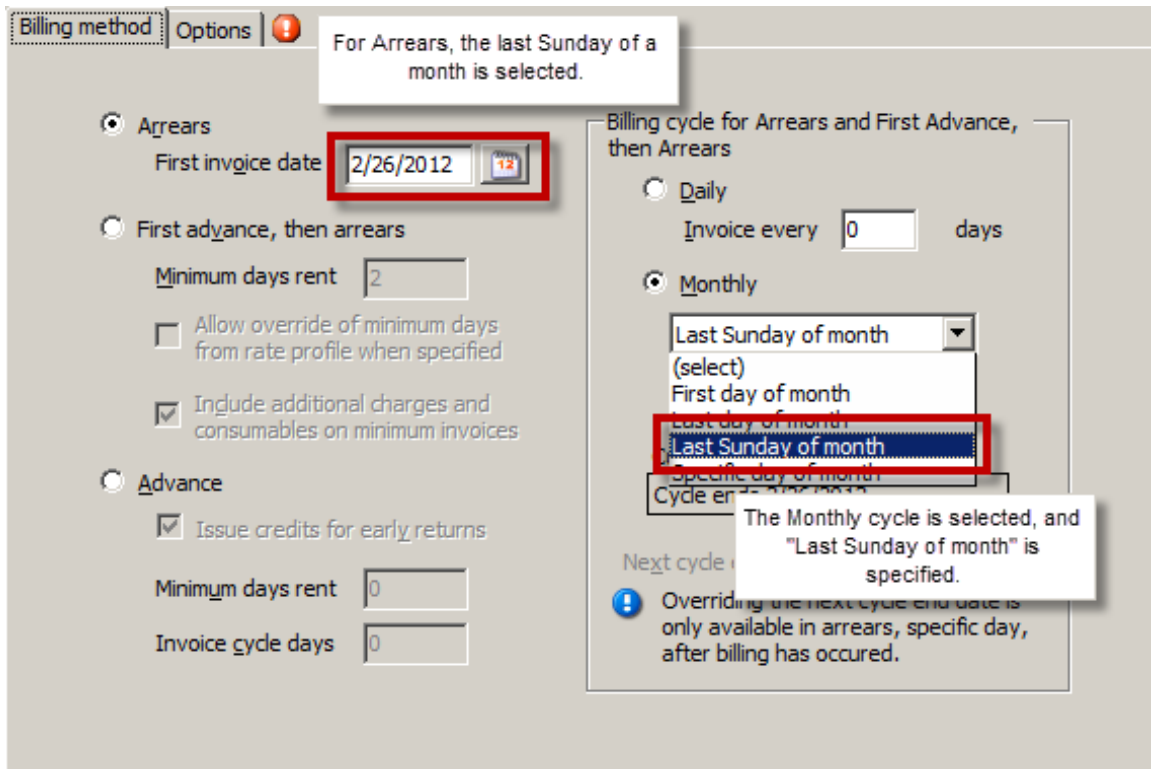
- Fixed various reports that were not recognizing A4 paper size when setting this in options.
- Fixed shipment report missing the label for driver.
- Average cost was incorrectly including the purchase price for new equipment.
- When creating a new estimate the products were not properly loading if the parent branch had a negative balance.
- Fixed crash when attempting to delete a recurring rent item that's in use.

Last Sunday of the Month Billing Cycle

You can now set up billing cycles to generate invoices on the last Sunday of each month. This feature works for the Arrears, and First Advance, then Arrears billing methods.

To set up a new Job Site to invoice on the last Sunday of each month, select the Arrears, or the First Advance, then Arrears billing method under the Billing tab. Then, specify the Monthly cycle and select 'Last Sunday of month' from the drop-down menu.

Note that, for Arrears billing, you must specify the last Sunday of a month as the first invoice date.



Override Next Billing Cycle End Date

You are now able to specify when the next billing cycle will end; overriding the date that would have otherwise been used based on your billing cycle settings. This can be done for Job Sites that are billed in Arrears with billing occurring on a specific day of the month. This will only function once billing has occurred for at least one cycle.

To override a billing cycle end date, edit a Job Site and, under the Billing tab, specify the desired date in 'Next cycle end date'.

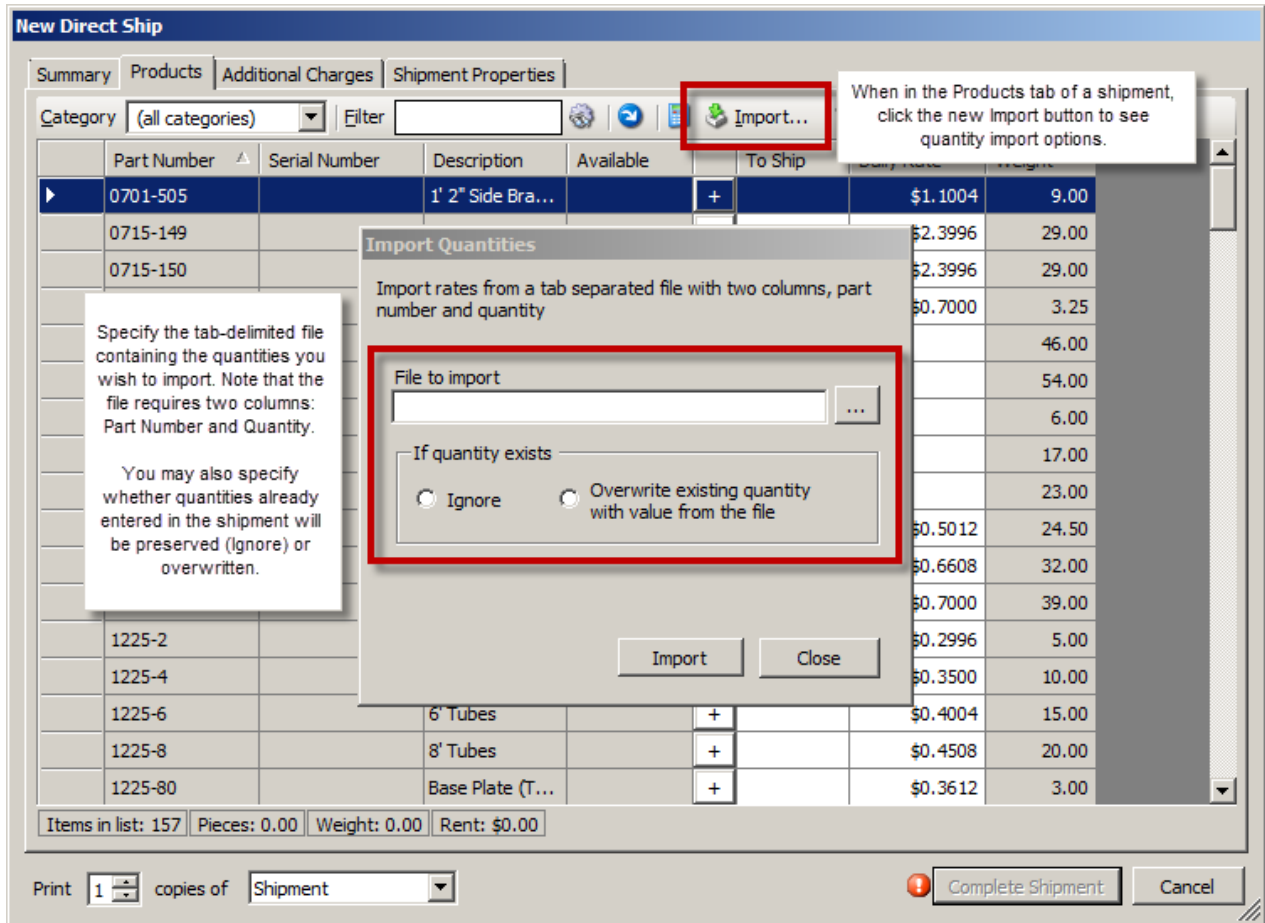
The screenshot shows the 'Billing method Options' configuration page. The 'Arrears' radio button is selected. The 'First invoice date' is set to 2/28/2012. The 'Billing cycle for Arrears and First Advance, then Arrears' section has 'Monthly' selected, with 'Specific day of month' chosen from a dropdown and 'Day of month' set to 28. The 'Current billing cycle' is shown as 2/29/2012 to 3/28/2012. The 'Next cycle end date' is set to 3/23/2012 and is highlighted with a red box. A callout box with a blue information icon states: 'Overriding the next cycle end date is only available in arrears, specific day, after billing has occurred.'

Once the cycle with the overridden end date has been billed, Quantify will resume using billing cycles ending on the originally-specified day of the month.

Import Shipment Quantities

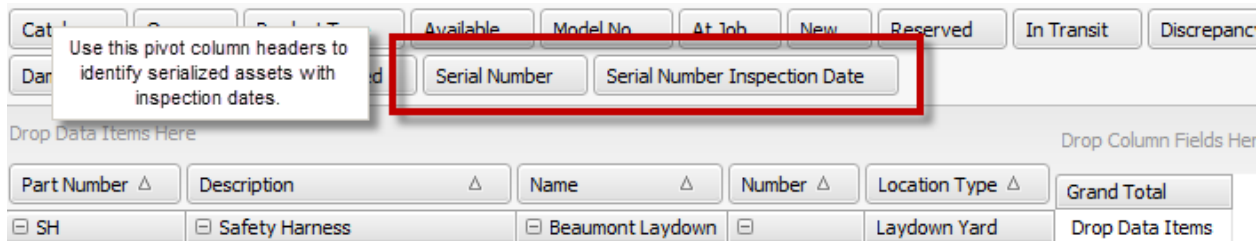
Quantify now supports importing part quantities from a file. To do this, create a tab-separated file with two columns, Part Numbers and Quantities that you wish to add to the shipment. You can then import from the file using the 'Import' button.

The Import Quantities screen will then allow you to specify the location of the file you created, and choose whether you want the import to ignore or overwrite any existing quantities on the shipment.

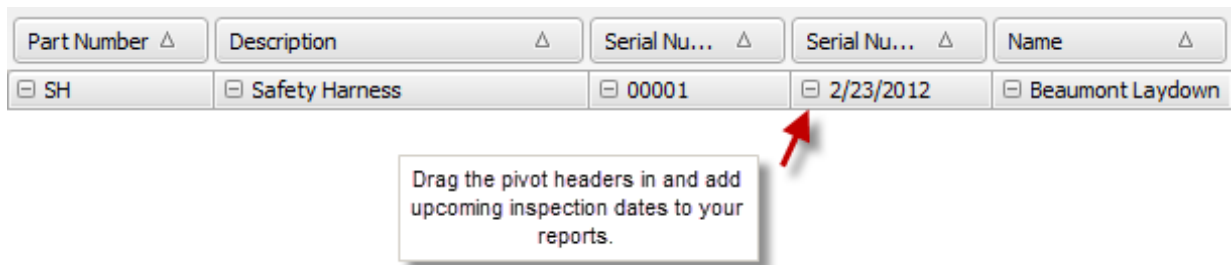


Next Inspection Date in Product Pivot Report for Serialized Parts

When generating Product Quantity pivot reports (found under the Products tab with a location selected under Organization), you can now include the Next Inspection Date for serialized assets in your reports. You will find the “Serial Number Inspection Date” pivot column header present in these pivot reports, as shown below.



By adding this new pivot header to your reports, you can include the next inspection dates that you’ve supplied for your serialized products.



Additional Charges with Negative Values as Credits

To issue credits on Additional Charges item such as labor and freight fees, you can now specify which charges are allowed to have negative prices. To do this, edit the Additional Charge and check the box next to 'Allow negative price per unit for issuing credits'.

Additional Charge

Active Default to taxable

Name: Use this item on all service tickets

Description: Category:

Unit: Item account type:

Price per unit: Accounting ID (Item name in QuickBooks):

Cost per unit: Cost code:

Weight: Revenue code:

Allow negative price per unit for issuing credits Check this box to enable negative pricing/crediting of this charge.

With that done, you can then input a negative value when using that Additional Charge. Quantify will then calculate this as a credit when performing billing.

New Direct Ship

Summary | Products | Consumables | **Additional Charges** | Recurring Rent | Shipment Properties

Additional Charges for Job Site Amusement Park

Name	Description	Weight	Units	Price/Unit	No. Units	Taxable	Total
DEL	3rd Party delivery fee	16.00	EA	\$350.00		<input type="checkbox"/>	
ENGD	Engineered Drawings		PAGE	\$150.00		<input type="checkbox"/>	
Freight	Freight		EA			<input type="checkbox"/>	
▶ General Labor	General labor hours		HR	(\$30.00)	2	<input type="checkbox"/>	(\$60.00)
Ins	Inspection fee	50.00	HR	\$50.00		<input type="checkbox"/>	
LD	Truck load/unload fee	900.00	EA	\$450.00		<input type="checkbox"/>	
MS	Mud Sills	10.00	EA	\$0.25		<input type="checkbox"/>	
PE	PE Stamp	100.00	EA			<input type="checkbox"/>	

Use a negative value with enabled Additional Charges to issue the credit.

Synchronizing Invoices with Negative Totals (Credits) with QuickBooks

You are now able to synchronize any credit/negative invoices that you generate with QuickBooks, allowing these invoices to be incorporated into your accounting software seamlessly.

Displaying Additional Charge Values on Shipment Reports

Before now, Additional Charge pricing has not been visible in any Shipping reports other than the Selected Shipment with Pricing report . Now, you can elect to see Additional Charge pricing in all Shipping reports.

To enable this, go to Tools, Global Options, Reports. In the Shipments section, check the box for “Show additional charge prices on shipment reports”.

Shipments

- Display signature details for delivery driver to sign
- Show additional charges on shipment reports
- Show additional charge prices on shipment reports

Display on return pick ticket Display on all shipments

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Now, when you run any Shipping report, the pricing of Additional Charges will be included.

Additional Charges		Weight (ea)	Price/Unit	Units	No. Units	Taxable	Total
Name	Description						
Freight	Additional Charge pricing appears when enabled in Global Options Reports.		\$200.00	EA	1	No	\$200.00
Total weight		0				Total	\$200.00