PRODUCT INFORMATION GUIDE

Avontus

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General Information

Features

Affordable
- Cost is about 5% of a single month’s rental income
- Unlimited users & unlimited jobs per branch office/laydown yard
- Reduces overhead by improving efficiency
- Improves DSO (days sales outstanding)

Rental Billing
- Tracks your billing cycles and knows when invoices need to be created
- Bill in advance, arrears, or first advance then arrears
- Flexible discounts & markups to match any customer’s rental billing needs
- Bill for consumables and services, such as freight and PE charges
- Generate invoices with one click

Inventory Management
- See re-rent in line with your own equipment
- Import electronic catalogs from the most common manufacturers
- Easy reservations, deliveries, returns and transfers
- View on-hand quantities as you enter shipments
- Service tracking and management of tools

Accounting
- Integrate with estimating, purchasing and accounting, including QuickBooks®
- Avoid double-entry of data
- A/R, A/P and payroll

On-the-Go
- View your data from a mobile device
- See available equipment when in the field
- Receive email notifications of shipments

Reports & Data
- Equipment utilization is easy to see
- Flexible reporting - design your own
- Save or email reports in PDF or Excel
- Add file attachments to shipments, estimates, etc.

Mapping
- Create driving directions
- Map job sites, branch offices and laydown yards
- Located serialized assets and trucks with GPS devices

And more
- Windows-based; use the computer skills you already have and your existing computers and network
- Live online training
- Share data over your network
Quantify Accounting Integration

Microsoft Certified Partner
Certified Partners possess a high degree of competence and expertise with Microsoft technologies. Avontus’ products have passed the rigorous testing and certification needed to achieve this relationship with Microsoft.

Intuit Developer Network

ACCOUNTING: A/R, A/P, PAYROLL, JOB COSTING
Your accounting program:
QuickBooks, Dynamics, SAP, Oracle, JDE, or other

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)
Outlook Business Contact Manager
& Microsoft Dynamics

RENTAL, LUMP-SUM, ADDITIONAL CHARGES,
UNIT-BASED BILLING, TAXES

STOREFRONT Point of Sale

Works With Windows 7
Tool Management

Tool Crib and Tool Kiosk
Quantify Tool Crib software consists of the Quantify Crib (a simplified version of Quantify), and the Tool Kiosk, an efficient touch-enabled application for rapid check out/check in. The Quantify Crib and the Tool Kiosk can be installed on the same device or networked for high-volume check out/check in locations.

Quantify Crib Setup
The Quantify Crib can be installed on any Microsoft Windows device. The person that manages tools utilizes this software to control their use. Various reports and pivots are available for tracking the tools employees use.

Tools Shipped to a Job
(from Quantify Tool Warehouse)

Quantify Tool Kiosk
The Tool Kiosk provides a simple user interface to allow fast self-check out and check in of tools by employees. The user interface is intuitive, like an ATM machine. Ruggedized touchscreens with large buttons allow for scrolling and quick check out of tools that the employee will use and return.

Scan or Enter
ID Badge
Number

Scan tools or
touch to check out
or check in
Tool Warehouse Return Service Processing

**Receive**

Tool status:
- 'To Be Serviced'
- 'Available'

**Inspect and Service**

Complete inspection and service procedures

**Use Parts for Repair and Maintenance**

Are service parts needed?
- Yes
- No

Is Tool still usable?
- Yes
- No

Record cost of tool on service ticket

**Create Service Ticket**

Tool status:
- 'Available'

RECEIVE TOOLS

- Tools Returned to warehouse

Does the part require servicing?
- Yes
- No

Tool Status: To Be Serviced

Does the part have a restocking fee?
- Yes
- No

Record fee as additional charge to be billed.

INSPECT AND REPAIR TOOLS

Complete inspection and service procedures

Record/scan parts used on service ticket

Remove service parts from inventory

Record time on service ticket

Tool Status: Available

Tool status: 'Available'

Scrap Tool (move to out of service)

Remove service parts from inventory

Record cost of tool on service ticket

Record time on service ticket
Asset Management

Full visibility of your inventory at all locations

- Instantly view quantities at branch offices, laydown yards, job sites and areas
- Instantly view consolidated inventory reports and utilizations at a corporate level

- Create inventory movements for rent, sell, purchase, transfers and re-rent
- View your inventory from any iPhone or Blackberry-type device
• Fully-scalable solution which can handle **an unlimited number of users**
• Built to Windows standards using the latest technology
• Customizable security permissions with user roles so you can control user access
• Automatic email notifications of shipments to keep you and your clients up-to-date
• Full functionality to handle serialized inventory
• Estimates can be converted to reservations/orders
• Reservations/orders can be converted to completed deliveries

**File Attachments**
Quantify allows you to attach multiple files to branches, customers, job sites and inventory movements. Since the files are embedded in the Quantify database, all Quantify users can access them.

You can attach:
• Certified drawings and inspection documents (PDF files and photos) to a job site or scaffold tag
• Health and safety documents to shipments
• Signed documents to reservations/orders
• Photographs of damaged items to a return
Billing Rent & Labor

Invoicing rent, consumables & services

Rental Billing
Generating rental invoices is perhaps the most complicated aspect of running a scaffolding, shoring, or formwork business. Quantify was designed to meet the demands of the most challenging billing situations, allowing you to cut costs with business process improvements and reduce the time between creating an invoice and collecting payment. Since Quantify creates invoices based on deliveries, returns, and transfers (partial or otherwise), the task of determining what equipment is on rent is handled automatically, eliminating the burden of manually organizing your data using spreadsheets or other time-consuming processes. Rates and billing methods are specified at the job site level, giving you crucial flexibility with complex billing situations. There are varying degrees of detail that you can choose to show in the invoices.

Unit prices - Additional costs
You can add non-inventory items to a shipment or invoice. Quantify calls these consumables and services “Additional Charges”, which you can rename if you’d like. Examples are freight, charges for PE stamped drawings, 2x4’s, 9 wire, etc.

Sales tax
Quantify includes the option to add sales tax to your invoices and to label these taxes as you wish (“State” and “County/Province” in the example below). Each job site can be taxable or not and have its own tax rates.
Creating Invoices
Invoices can be generated for all activities or for a specific customer or single job site. **Quantify tracks your billing cycles and knows when invoices need to be created.** You simply enter the invoice date and click the ‘Create Invoices’ button and Quantify produces a list of invoices for transactions that have occurred through this date. You can review the invoices prior to saving them and edit an invoice after it has been created.

Rate Profile
The core of billing in Quantify is the rate profile. Rate profiles allow you to specify rent rates and discounts or markups. Rate profiles are defined once and set on each job site and can vary from job to job.
Billing Method
The billing method is used to tell Quantify how to create rental invoices for the various parts and pieces that are located at a job site. Quantify can accommodate any billing scenario and, since this is defined at the job site level, it can vary from job to job. You can define the time period an invoice will cover (called a ‘cycle’), as well as specify minimum billing days to ensure that you receive a minimum amount of revenue for a particular rental.

**Arrears (post-bill)**
The “arrears” billing method tells Quantify to generate invoices at the end of the billing cycle, at whatever interval suits your company’s processes. This is the simplest billing method. This method can be used to generate invoices on any given day of the month, such as the first or last day, and consistently bills on this cycle. You can also bill in arrears using a specific number of days in the cycle, such as 14 or 28.

**First Advance, Then Arrears**
Probably the most common billing method, “first advance, then arrears”, is a combination of both the advance and arrears billing methods. The first invoice is generated in advance for the “minimum days rent”, starting on the rent start date. After the minimum days rent and the first cycle have passed, Quantify generates invoices in arrears so that future invoices are created at the end of each cycle. Credits are not issued if the customer returns the equipment within the minimum period.

**Advance with and without Credits (pre-bill)**
Using this method Quantify will generate the first invoice based on the rent start date for the minimum days rent; the customer is charged this minimum even if the equipment is returned before the minimum days have passed. Subsequent invoices will be based on the first day of each billing cycle, determined by the “invoice cycle days”. (If minimum days rent is set to 0, the first invoice will begin the advance billing cycle and will cover the number of days in the invoice cycle.) Some people call this ‘pre-billing’, as your customer receives an invoice for the equipment at the job site prior to utilizing it for the entire billing period. Quantify gives you the option to issue credits for items that were pre-billed but returned before the cycle ends.
Example
Below we will illustrate how Quantify handles specific deliveries and returns to calculate quantities at a job site used for billing. In this example we will deliver formwork panels and scaffold frames from a branch office to a job site. While Quantify does not restrict where you can ship equipment (job site to job site, branch to branch, etc.), for the purposes of this example we will keep it simple.

Summary: 10 formwork panels are delivered from the branch office to the job site. There are now 10 formwork panels at the job site.

Summary: 10 formwork panels and 10 scaffold frames are delivered from the branch office to the job site. There are now 20 formwork panels and 10 scaffold frames at the job site.

Summary: 5 formwork panels and 5 scaffold frames are returned to the branch office; 15 formwork panels and 5 scaffold frames remain at the job site.

Summary: 15 formwork panels and 5 scaffold frames are returned to the branch office; no equipment remains at the job site.
Rental Billing Timelines

First Advance, then Arrears (pre-bill, then post-bill)

The first invoice for the advance period (minimum days rent) can be created and sent on the rent start date; the minimum is charged even if the equipment is returned prior to the end of the minimum period. After the minimum period, billing is done in arrears. Subsequent invoices can be generated every 28 days (or whatever cycled you choose) until all equipment is returned, at which time a final invoice for the balance of days on rent can be generated.

Regardless of when a shipment occurs in a job site's billing cycle, an invoice for the minimum days rent can be created. For example, if a shipment were sent on 5/22 in the timeline below, the 28 day minimum will appear on an invoice generated 5/22. If invoices were not generated until 6/26 then the minimums would 'sync up' with the billing cycle and appear on the invoice with the arrears billing.

The timeline below shows deliveries and returns as well as the invoice dates for billing first in advance, then in arrears with “minimum days rent” and “invoice cycle days” both set to 28 days.

**FIRST ADVANCE THEN ARREARS(28 DAY MINIMUM/28 DAY CYCLE)**
Advance with Credits (pre-bill)

The first invoice for the advance period (minimum days rent) can be created and sent on the rent start date; the minimum is charged even if the equipment is returned prior to the end of the minimum period. After the minimum period, billing is done in arrears. Subsequent invoices can be generated every 28 days (or whatever cycled you choose) until all equipment is returned, at which time a final invoice for the balance of days on rent can be generated.

Regardless of when a shipment occurs in a job site's billing cycle, an invoice for the minimum days rent can be created. For example, if a shipment were sent on 5/22 in the timeline below, the 28 day minimum will appear on an invoice generated 5/22. If invoices were not generated until 6/26 then the minimums would 'sync up' with the billing cycle and appear on the invoice with the arrears billing.

The timeline below shows deliveries and returns as well as the invoice dates for billing first in advance, then in arrears with "minimum days rent" and "invoice cycle days" both set to 28 days.

**FIRST ADVANCE THEN ARREARS (28 DAY MINIMUM/28 DAY CYCLE)**
Arrears (post-bill)

Arrears is the simplest billing method and only bills for equipment that was at a job site. Invoicing can be completed on a daily, end of month, or specific-day-of-month cycle. Two common cycles for this method are end of month and 28 days. Invoices are created at the end of the specified cycle until all equipment is returned, at which time a final invoice for the balance of days on rent can be generated.

The timeline below shows deliveries and returns as well as the invoice dates for billing in arrears with a cycle of 28 days.
## Sample Quantify Invoices

**Send Payment To:**
PO Box 89546
Galveston, TX 77591

---

**Customer**
Santa Cruz Specialty Services
P.O. BOX 1056
PORT ARTHUR 77641

---

**INVOICE INV-0000168**

- **Invoice date:** 9/21/2011
- **Job/Number:** Evaporator - 5145
- **Order:** PO: 8579-009

**Created:** 6/22/2011 6:04 PM
M: Minimum rental applies
R: Rate change applies

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Units</th>
<th>Price/Unit</th>
<th>No. Units</th>
<th>Taxable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td># 9 WIRE ROLL</td>
<td># 9 WIRE ROLL</td>
<td>EA</td>
<td>$72.00</td>
<td>1</td>
<td>No</td>
<td>$72.00</td>
</tr>
<tr>
<td>Freight</td>
<td>Freight</td>
<td>EA</td>
<td>$500.00</td>
<td>1</td>
<td>No</td>
<td>$500.00</td>
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<tr>
<td>Labor</td>
<td>Labor</td>
<td>EA</td>
<td>$1,400.00</td>
<td>1</td>
<td>No</td>
<td>$1,400.00</td>
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<tr>
<td>Rent</td>
<td>Equipment Rent</td>
<td>Each</td>
<td>$615.78</td>
<td>1</td>
<td>Yes</td>
<td>$615.78</td>
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</table>

**Subtotal** $2,587.78

**Sales Tax:** County (8.5%) $52.34

**Other tax:** (none) $0.00

**Invoice Total** $2,640.12

---

Sample summary invoice
INVOICE INV-0000168

Invoice date 9/21/2011
Job/Number Evaporator - 5145
Order PO: 8579-009

Send Payment To:
PO Box 89546
Galveston, TX 77591

Customer
Santa Cruz Specialty Services
P.O. BOX 1056
PORT ARTHUR 77641

Rent (taxable) $615.78

Non-Rental Items

<table>
<thead>
<tr>
<th>Shipment</th>
<th>Name</th>
<th>Description</th>
<th>Units</th>
<th>Price/Unit</th>
<th>No. Units</th>
<th>Taxable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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<td>Freight</td>
<td>Freight</td>
<td>EA</td>
<td>$500.00</td>
<td>1</td>
<td>No</td>
<td>$500.00</td>
</tr>
<tr>
<td>DEL-00733</td>
<td>Labor</td>
<td>Labor</td>
<td></td>
<td>$1,400.00</td>
<td>1</td>
<td>No</td>
<td>$1,400.00</td>
</tr>
</tbody>
</table>

Unit Price $1,972.00

Subtotal $2,587.78

Sales Tax: County (8.5%) $52.34
Other tax: (none) $0.00

Invoice Total $2,640.12

Sample summary with rent lines invoice
### Rental Items

<table>
<thead>
<tr>
<th>Part</th>
<th>Shipment</th>
<th>Actual Ship</th>
<th>Qty</th>
<th>From</th>
<th>To</th>
<th>Days</th>
<th>Daily Rate</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td>174-6 - 6' Wood Board</td>
<td></td>
<td></td>
<td>0</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Delivery</td>
<td>50</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0393</td>
<td>$55.02</td>
</tr>
<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Rent</td>
<td>50</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0393</td>
<td>$55.02</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>50</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0393</td>
<td>$55.02</td>
</tr>
<tr>
<td>174-8 - 8' Wood Board</td>
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<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Delivery</td>
<td>100</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0500</td>
<td>$140.00</td>
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<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Rent</td>
<td>100</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0500</td>
<td>$140.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>100</td>
<td>9/18/2011</td>
<td>10/15/2011</td>
<td>28</td>
<td>M $0.0500</td>
<td>$140.00</td>
</tr>
<tr>
<td>2607-307 - 10'1&quot; Horizontal</td>
<td></td>
<td></td>
<td>250</td>
<td>8/25/2011</td>
<td>9/20/2011</td>
<td>27</td>
<td>$0.0518</td>
<td>$104.90</td>
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<tr>
<td>DEL-00730</td>
<td>6/21/2011</td>
<td>Rent</td>
<td>75</td>
<td>8/25/2011</td>
<td>9/20/2011</td>
<td>27</td>
<td>$0.0518</td>
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<td>RET-000026</td>
<td>9/20/2011</td>
<td>Return</td>
<td>15</td>
<td></td>
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<td></td>
<td></td>
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<td>DEL-00730</td>
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<td>Rent</td>
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<td>9/21/2011</td>
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<td>235</td>
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<td>2625-307 - 10'1&quot; Bridging Unit</td>
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<td>Rent</td>
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<td>27</td>
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<td>RET-000026</td>
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<td>Return</td>
<td>5</td>
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</tr>
<tr>
<td>DEL-00730</td>
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<tr>
<td></td>
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<td></td>
<td>235</td>
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<td>9/21/2011</td>
<td>28</td>
<td>$0.2143</td>
<td>$58.93</td>
</tr>
</tbody>
</table>

### Non-Rental Items

<table>
<thead>
<tr>
<th>Shipment</th>
<th>Date</th>
<th>Name</th>
<th>Description</th>
<th>Units</th>
<th>Price/Unit</th>
<th>No. Units</th>
<th>Taxable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td># 9 WIRE</td>
<td># 9 WIRE ROLL</td>
<td>EA</td>
<td>$72.00</td>
<td>1</td>
<td>No</td>
<td>$72.00</td>
</tr>
<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Freight</td>
<td>Freight</td>
<td>EA</td>
<td>$500.00</td>
<td>1</td>
<td>No</td>
<td>$500.00</td>
</tr>
<tr>
<td>DEL-00733</td>
<td>9/18/2011</td>
<td>Labor</td>
<td>Labor</td>
<td></td>
<td>$1,400.00</td>
<td>1</td>
<td>No</td>
<td>$1,400.00</td>
</tr>
</tbody>
</table>

**Unit Price**: $1,972.00

**Subtotal**: $2,587.78

**Sales Tax: County (8.5%)**: $52.34

**Other tax: (none)**: $0.00

**Invoice Total**: $2,640.12
Let Your Customers See Their Invoices & Shipments

Your relationship with your customer is important and an essential part of this relationship involves sharing information. Whether it’s via telephone conversations, mailed invoices, or emailed PDF files, you have information in common. Quantify was built from the ground up to give you the ability to more easily share this data - invoices, shipments, job site balances, and whatever other information you’d like. Doing this in real-time increases your customer’s efficiency, speeds up payment, and increases trust between your companies.

Quantify’s Location-Based Security feature allows you to share data with your customers. You’ll need to install Quantify Web on your server and give your customer instructions on how to install Quantify and the remote URL of your server.

To begin, click on the Customer tab. You will see the contacts associated with each customer. Contacts are managed through the customer record instead of the Users tab in order to separate customer contacts from your employees. To add a contact either double-click the customer or highlight the customer name and click the edit button on the toolbar above.

On the customer dialog box you’ll see additional Add/Edit/Delete buttons for the contacts. There are two important things to note on the contact record. First, contacts can only have a role of ‘Customer’. Second, if you want the contact to be able to log in and view data, check the box that allows them to see the parent customer’s jobs.
Because you may have many different contacts for a customer as well as many different job sites, Quantify doesn’t blanket-assign a contact to all jobs for that customer. Instead, you assign individuals to the various locations that you want them to see. Assignment of customers to job sites is accomplished by selecting “Assign Customer Users to Job Sites and Job Site Groups” under Security on the Users tab.

Although similar to assigning individual users to job sites, the customer view of this dialog box filters by customer. Once a customer is selected, the tree view displays the job sites associated with the customer and also filters the user list to display only the related contacts. Simply select the customer contact from the User list and then check the boxes next to the job sites that they belong to.

Shown below is a screen grab of what Quantify looks like when the customer is logged in. The customer will not see tabs that they do not have access to, such as Customers, Vendors, and Users.

The customer will see only invoices and shipments for job sites they are assigned to.

Contacts also see a different tree view of your organization. The main parent node is their company name and the underlying job sites are the ones they belong to. By default they also see the shipments, invoices, and various pivots and reports, plus the ability to map the locations in Google Earth and view product history. All of the permissions for a customer are customizable.
Billing for Additional Charges

Quantify easily accomplishes billing for labor, consumables, and service items through a feature called ‘Additional Charges’. Additional charges are a list of items that you customize to meet the specific needs of your business, including:

- Lump sum labor for dismantling and erecting scaffolding. The unit for these items is commonly “each”.
- Unit-based labor per hour, or per other unit of measure such as leg-feet or volume.
- Consumables, such as 2x4’s, #9 Wire.
- Service items like freight and PE stamped drawings. Service items commonly have a unit of “each”.

Additional charges flow from estimates to invoices as a normal part of using Quantify. The order of flow is typically:

1. Estimate – Estimates can have any number of additional charges on them. An estimate is easily converted to a shipment to begin the job.
2. Shipment – Any shipment can contain additional charges.
3. Invoice – Upon invoice creation additional charges on a shipment are added to the invoice. Invoices can also be edited to modify additional charges and change tax rates or taxable items.
When creating an estimate or shipment the list of additional charges is available, allowing you to specify quantities, weight and number of units just like you would in Microsoft Excel. Depending upon your settings in your Quantify options, you can also change the description and price/unit as well as override whether the item is taxable or not.

These additional charges are included on invoices and can synchronize with QuickBooks and other accounting programs for full job cost tracking.
Using Quantify with QuickBooks

For the typical scaffold company with hundreds or thousands of billable jobs, integration with accounting software is often a chore. The sheer volume of data creates a tedious, error-prone, and often expensive task in even the most efficient accounting department.

Quantify and QuickBooks communicate with each other seamlessly, eliminating the burden of manual data entry. Invoices that are created by Quantify are automatically added to QuickBooks in a single step. What's more, the jobs and customers associated with the invoices are linked to these items in QuickBooks, giving you instant and accurate job costing, receivables, commission tracking, posting of taxes due, and other vital financial data.

Quantify does this by “synchronizing” data with QuickBooks. Synchronization is a two-way process in which information is linked between QuickBooks and Quantify. Invoices in Quantify are updated with payment status and other data as they change in QuickBooks. This synchronization occurs automatically with new invoices and continues until the invoices are paid and jobs are closed.

Setup
To set up the communication link between Quantify and QuickBooks first start both programs. From within Quantify, open Global Options from the Tools menu. On the Billing tab under Accounting Integration, select QuickBooks and your QuickBooks company file. Then test the connection by clicking the Test Settings button. QuickBooks will display a certificate dialog box and ask you if you’d like to allow Quantify to connect. Select the item “Yes, whenever this QuickBooks company file is open” and press the Continue button.

Rental and Additional Charges
When an invoice is created in QuickBooks a single invoice line item is added for the total of the rental on the Quantify invoice, as well as for each additional charge. Rental is mapped through the “Accounting item types” in Global Options on the Billing tab, while additional charges are mapped by Accounting ID when setting up each additional charge. When you attempt to synchronize an invoice you will be notified if an additional charge cannot be found. The invoice won’t synchronize and you’ll be able to correct the issue by adding the item in QuickBooks and resynchronizing in Quantify.


Quantify Invoice Line Items

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Units</th>
<th>Price/Unit</th>
<th>No. Units</th>
<th>Taxable</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rent</td>
<td>Equipment Rent</td>
<td>Each</td>
<td>$15.57</td>
<td>1</td>
<td>Yes</td>
<td>$15.57</td>
</tr>
<tr>
<td>2x4</td>
<td>2x4 Wood Toeboards</td>
<td>FT</td>
<td>$0.61</td>
<td>145</td>
<td>Yes</td>
<td>$88.45</td>
</tr>
<tr>
<td>Callout</td>
<td>Callout for labor charges</td>
<td>EA</td>
<td>$200.00</td>
<td>1</td>
<td>No</td>
<td>$200.00</td>
</tr>
</tbody>
</table>

Corresponding QuickBooks Invoice Line Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Description</th>
<th>Rate</th>
<th>Amount</th>
<th>Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rent</td>
<td>1</td>
<td>Equipment Rent</td>
<td>19.57</td>
<td>19.57</td>
<td>Tax</td>
</tr>
<tr>
<td>2x4</td>
<td>145</td>
<td>2x4 toeboards</td>
<td>0.61</td>
<td>88.45</td>
<td>Tax</td>
</tr>
<tr>
<td>Callout</td>
<td>1</td>
<td>Callout for labor charges</td>
<td>200.00</td>
<td>200.00</td>
<td>Non</td>
</tr>
</tbody>
</table>

Synchronizing Invoices and Credit Memos

Synchronization is easy and accomplished in a single button click. Once you have created invoices in Quantify click the ‘Synchronize Invoices’ menu item from the QuickBooks toolbar button on the Invoices tab. After synchronization is complete you will see a summary dialog box that shows you the details of what was added and updated.

Quantify invoices are now linked to the newly created invoices in QuickBooks and their details are updated upon all subsequent synchronizations. Columns in the grid that are related to QuickBooks will appear once synchronization has started. The invoice due date, total in QuickBooks, and status (paid, not paid, etc), are displayed in blue text. The invoice status, payment date, and other details are updated with QuickBooks values until they're fully paid in QuickBooks (note that a partially-paid invoice will display a ‘Not Paid’ status in Quantify).

<table>
<thead>
<tr>
<th>QuickBooks Total</th>
<th>Customer</th>
<th>QuickBooks Status</th>
<th>QuickBooks Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>$317.09</td>
<td>Litware, Inc.</td>
<td>Not Paid</td>
<td>1/22/2010</td>
</tr>
<tr>
<td>$1,013.65</td>
<td>Litware, Inc.</td>
<td>Not Paid</td>
<td>1/22/2010</td>
</tr>
<tr>
<td>$275.13</td>
<td>Litware, Inc.</td>
<td>Not Paid</td>
<td>1/22/2010</td>
</tr>
<tr>
<td>$556.12</td>
<td>Litware, Inc.</td>
<td>Paid</td>
<td>1/22/2010</td>
</tr>
<tr>
<td>$56.12</td>
<td>Litware, Inc.</td>
<td>Not Paid</td>
<td>1/22/2010</td>
</tr>
</tbody>
</table>
You can filter the list of displayed invoices by status by clicking on an item in the Filter menu.

The Quantify invoice number will be updated to the number that is auto-assigned by QuickBooks when the invoice or credit memo is added to QuickBooks. In Quantify this number is required to be unique and a case can arise in which QuickBooks assigns a number that is in use by another Quantify invoice. If this occurs then the invoice is saved in QuickBooks but the Quantify invoice will be assigned a new number. You can change the invoice number in Quantify and QuickBooks but the invoice number must be unique. This behavior also occurs for credit memos.

QuickBooks attempted to assign a number to an invoice that will make the number no longer unique in Quantify. Quantity invoice number has been set to 'E6D919'

Rental credits are created in Quantify when they are due for early returns and other situations. These rental credits are created with a single rental item and should not contain any additional charges. If a credit memo contains additional charges you will receive a warning to remove them. To issue a credit for previously invoiced additional charges, create a credit memo within QuickBooks.

Credit memo 'CR-000001' contains additional charges, which is not supported. Please remove the additional charges and re-synchronize with only a rental credit

The status for a credit memo will display the text “Not Paid” when it has any unapplied amounts in QuickBooks. When the amount of the credit in QuickBooks has been fully applied to customer payments the credit will display a status of “Paid”.

There was an error attempting to retrieve a QuickBooks invoice with number '52'. Verify that this invoice still exists in QuickBooks and either reset synchronization or set the invoice to not synchronize.

To remove the link between QuickBooks and Quantify for an invoice, highlight the invoice in Quantify and select the ‘Reset Synchronization’ menu item. If there is an invoice (such as a zero invoice) in Quantify that you don't wish to import into QuickBooks, highlight the invoice and select the ‘Do Not Sync’ item prior to synchronizing. Invoices with a status of ‘Do Not Sync’ are ignored.

After an invoice is synchronized with QuickBooks it cannot be changed in Quantify. If needed, changes must be made in QuickBooks. You can, however, reset the synchronization in Quantify, void or delete the invoice in QuickBooks, then edit the invoice in Quantify and synchronize again. Doing these steps will re-add the invoice in QuickBooks. Keep in mind that the invoice number in QuickBooks may change.

**Customers**

Customers are required on invoices in both QuickBooks and Quantify. Once synchronization occurs Quantify will match customers by name and ‘link’ them. Unlike most other data, a customer is required to be set up in QuickBooks first and invoicing won’t proceed without a matching customer. This is so that you can maintain the QuickBooks relationship with other software, such as CRM and Point Of Sale. If you attempt to synchronize and a customer name isn’t matched you will receive a warning similar to the one below.

Customer 'Litware, Inc.' does not exist in QuickBooks and needs to be added first (invoice 103)

If a matching customer is found, Quantify will ‘link’ the customer with an underlying ID that is stored and reused in later synchronizations. This link is established so that you can rename the customer in Quantify or QuickBooks and maintain the relationship. Although the link will still work, it is recommended to keep these names similar at all times.

Matching customer Litware, Inc. found, item linked QuickBooks customer
If for some reason a customer cannot be found in a later synchronization (such as if it was deleted in QuickBooks), Quantify will detect this condition and remove the link so that it can be reestablished. You will see a warning similar to the one below when this happens.

Matching customer Litware, Inc. was not found, the link to QuickBooks is broken and has been reset. Please resolve this item manually by adding or renaming.

**Job Sites**

Unlike customers, Jobs are automatically added to QuickBooks if a matching job (by name) isn't found. By default, in QuickBooks, the sales rep from the customer is added to the job so that you can track commissions.

Job Containment was added to QuickBooks for customer Litware, Inc.

Matching Job Site Containment found, item linked to QuickBooks job

If Quantify attempts to fetch a job in QuickBooks and it's not found (due to deletion, for example) then Quantify will remove the link so that it can be reestablished. You will be notified of this condition when it happens as shown below.

Matching job site Containment was not found, the link to QuickBooks is broken and has been reset. Please resolve this item manually by adding or renaming it.

The billing address on the Quantify job site is added to the QuickBooks job.

**Quantify Job Site**

<table>
<thead>
<tr>
<th>Job Site name</th>
<th>Office expansion</th>
</tr>
</thead>
</table>

| Billing Address | 1836 Northwest Boulevard Coeur D Alene, ID 83814 |

**Corresponding QuickBooks Job Site**

**Job Information**

<table>
<thead>
<tr>
<th>Job Name</th>
<th>Office expansion</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Job Type</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Litware, Inc.</th>
</tr>
</thead>
</table>

| Billing Address | 1836 Northwest Boulevard Coeur D Alene, ID 83814 |

**Taxes**

If using Quantify and QuickBooks for taxes, only the first tax code is used in Quantify. Once a tax code is matched between Quantify and QuickBooks it is linked. The taxes on an invoice are posted to tax agencies in QuickBooks from a Quantify invoice. For items that have multiple tax agencies (such as state and county) set up a tax ‘group’ in QuickBooks and associate multiple tax rates per that group. Use a single tax code in Quantify with the combined rates (add them together) and name it the same as the QuickBooks tax group. Quantify expects your QuickBooks installation to have two tax codes: taxable and non-taxable. Upon synchronization Quantify will use the first taxable and non-taxable codes that it finds. Please contact Avontus if you’re using more than one taxable or non-taxable code and would like to use the non-default one.
Scaffold Tag Tracking

Summary
Quantify has a type of job site that allows for scaffold tag tracking contained within a single 'tag job'. Using a tag job, individual scaffold tags are managed within their own tab. Shipments to and from the job are completed within the scaffold tag itself.

Scaffold Tags
To allow scaffold tag tracking, first select this option on the 'Job Site Options' tab in Global Options. Next edit the job site by selecting 'Track individual scaffold tags at this location' on its Scaffold Tags tab.

To add a new scaffold tag, select the job from the tree view on the left, then within the 'Scaffold Tags' tab, click the Add button. To modify a scaffold tag, click the Edit or Delete buttons on this tab.
When a tag is first created you can enter any unique number for the tag number (if that number is already in use, you will receive a warning when clicking OK.). After a tag is created the Tag field is disabled and you will need proper permissions to change it.

The status of the scaffold tag is required and is set to ‘On Rent (in use)’ by default. Scaffold tags can be filtered by status on the Scaffold Tags tab; this filter is also set to ‘On Rent (in use)’ by default.

You can select a purchase order or an associated work order. An order specified here will appear on all reports and pivots.

If you wish, you can select a priority, project or step. These lists are managed from the Scaffold Tags tab.

You may select from the Customer (Representative and Requestor) and Employees (Foreman, Builder and Dismantler) lists. Customers and employees are managed from the Customers tab and Users tab, respectively, on the main window.

Dimensions play a very useful role in scaffold tag tracking and provide an idea of the size of a scaffold. Leg feet and volume are automatically calculated when you enter the dimensions. (Note that the leg foot calculation does not include an extra 42” added to each leg to account for the height to the top guardrail.)

Deliveries and returns are completed within the scaffold tag itself. To deliver or return from a tag, locate it within the list, click on the Shipments tab below the selected tag, and then click the Deliver or Return button.

The shipment window for scaffold tags is simpler than for other locations and therefore easier to complete.
Reporting
Two reports and one pivot are available for scaffold tags.

Print Preview Selected Tag
The Print Preview Selected Tag report displays all of the properties on the scaffold tag, plus a list of the materials that are currently stocked on the tag.

Return Pick Ticket for Tag
This report displays a return pick ticket, which can be printed for manual counting of materials. The rows are larger on this report for manual entry. (The ‘actual quantity’ is displayed unless the option to ‘Hide quantities on the Return Pick Ticket’ is selected from Receiving Options on the General tab of the tag/job site.)

Scaffold Tag Pivot
The pivot for scaffold tags displays all data for the selected job or parent branch in a pivot. Note that tags are not displayed when selecting any location above the branch office in the organization tree.

Security
Permissions exist to control users’ ability to make changes to scaffold tags. Items in bold indicate that the role can do the action, but only if the user is assigned to the location that the scaffold tag belongs to.
Overages from Job Sites

In the complex world of tracking scaffolding, shoring, and formwork, it’s common to receive more equipment than you sent to a job. This can be due to numerous reasons, such as:

- Your customer has multiple jobs and has sent your equipment from one job to another without your knowledge and is now returning it all at once.
- The equipment you received isn’t yours.
- Someone found items on a job site that were previously lost.

These common occurrences can be handled in Quantify by simply returning more equipment than was at the job site, including items that aren’t there.

Options

Since this feature is disabled by default, when an over-return is attempted you’ll see an error message like below.

To enable this feature, check the option ‘Allow balance to go negative’ in the Global Options dialog box under the Job Site Options tab. With this checkbox checked you can return more equipment than is currently stocked at a job.

Negative Balance

When an over-return occurs a negative balance is left at a job site. Once you’ve determined how you will fix the balance, highlight the item and click the ‘Clear negative balance at job site’ button on the toolbar.

When this button is clicked a dialog box is displayed that allows you to choose what to do with the branch balance - either subtract or add back the equipment. In the dialog box below, Westminster is the parent branch and Colton WWTP Clarifier is the job site.
Resolving the negative balance will set the quantity for this item to zero at the job site and, depending upon what option you've chosen on the resolve dialog box, either subtract or add this value from the branch balance.

When attempting to adjust the balance, if the selected part stocked at the selected location doesn't match what is shown in the stocked product grid (an accumulation of balances from job site groups), then an error message will be displayed.

Resolving Balances for Scaffold Tags
To resolve negative balances on a scaffold tag you can click on the resolve button in the Bill of Materials for the tag. Clicking this button will display the same dialog box to resolve the balance.
**Viewing Changes in a Pivot**

When negative balances are resolved, the adjustment that you make is stored in history so you can see what happened. This history is displayed in a pivot report, which is accessed by highlighting the job in question and clicking the history button on the toolbar above the job.

This pivot displays the change that was made, as well as the comment and average cost of the part at the time of the adjustment (useful for writing off assets in financial systems).

**Reports**

To easily see jobs that have negative balances, a report on the Products tab displays all jobs with a negative balance.

**Rental Billing**

Rental billing is not affected by over returns. When invoices are created they treat this situation as a complete return and do not issue credits.

**Deliveries and Transfers**

Note that overages are not allowed on a job to job transfer. Additionally, when a balance is negative at a job site you cannot ship a part to the job if there is a negative balance for that part; the negative balance for the part must first be resolved.
Job Costing & History

Overview of Job Costing with Accounting Software
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Stan Snyder, CPA

Job costing is the process of tracking the expenses incurred on a job against the revenue produced by that job. Job costing is an important tool for those who are pairing a relatively high dollar volume per customer with a relatively low number of customers. For example, building contractors, subcontractors, architects and consultants often use job costing, whereas a hardware store or convenience store would not use job costing.

Job costing using accounting software enables you to track a number of factors and analyze the results to aid decision making. A Job costing report helps you ensure that all costs involved in a job have been properly invoiced to the customer. An Estimates vs. Actuals report compares quoted costs to actual costs, and quoted revenues to actual revenues so that you can analyze any variances between your quote and the actual result. You can then use the results of your analysis to create more accurate quotes when you bid on future jobs.

Using job costing will allow you to identify the most and least profitable areas of your business, so that you can focus on the profitable elements, and try to make the less profitable aspects of your business more efficient. It will help you to quote new jobs more accurately, and assist you in managing jobs in progress.

Components of job costing
There are numerous aspects to job costing, and you may use many, some or none of them. If you want to use job costing, you need to:
1. Track the costs involved in the job
2. Make sure all of the costs are invoiced to the customer
3. Produce reports showing details of costs and revenues by job

The fundamental components of job costing are:
- Quotes – also known as estimates, bids, or proposals
- Fixed fee jobs
- Time and materials jobs
- Revenues
- Items
- Direct costs
- Standard costs

Let’s take a look at the meaning of each of these components and how you might use them in job costing.

Quotes
Most people are familiar with quotes. Quotes are non-posting transactions. They do not affect your financial statements or your general ledger. You prepare a quote to give your customer an estimate of projected costs, before a job is awarded. However, quotes also provide a means to track costs as the job progresses, so that costs do not get out of line, or so that cost variances can be identified and dealt with quickly.
**Fixed fee jobs**
Fixed fee jobs are an agreement to complete a job for a customer for a set price, no matter what costs are incurred. While this may seem like a good deal for the customer, an experienced estimator will set a price high enough to cover any contingencies, which may result in a higher price than a time and materials job.

**Time and materials job**
On a time and materials job, costs of labor and materials are passed on to the customer. A markup for overhead and profit may be built-in as a percentage of each item or stated as a separate line item. Time and materials jobs are often preferred by the seller, as any unforeseen costs may be passed on to the customer.

**Revenues**
Revenues are critical to the life of any business. In job costing, revenues are not only categorized by account, but also by customer, job and item. Think of jobs as sub-categories of customers and items as sub-categories of revenue/expense. This creates a new way of analyzing your revenues and the costs incurred to produce them.

Expenses become revenues; as costs are incurred for a job, they are marked up and passed on to the customer as revenues. To be able to compare your costs to the revenues they produce, you should create matching categories in your revenue accounts and cost of goods sold accounts (COGS). The accounts in your chart of accounts should represent general overall categories of your business, and not individual customers, vendors or detailed sales/cost information. Those details are recorded using items, the customer list and the vendor list. A sample section of the chart of accounts for a general contractor might look something like this:

<table>
<thead>
<tr>
<th>Revenues</th>
<th>Cost of goods sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>General requirements – materials revenue</td>
<td>General requirements – materials COGS</td>
</tr>
<tr>
<td>General requirements – labor revenue</td>
<td>General requirements – labor COGS</td>
</tr>
<tr>
<td>Sitework – materials revenue</td>
<td>Sitework – materials COGS</td>
</tr>
<tr>
<td>Sitework – labor revenue</td>
<td>Sitework – labor COGS</td>
</tr>
<tr>
<td>Concrete – materials revenue</td>
<td>Concrete – materials COGS</td>
</tr>
<tr>
<td>Concrete – labor revenue</td>
<td>Concrete – labor COGS</td>
</tr>
<tr>
<td>Masonry – materials revenue</td>
<td>Masonry – materials COGS</td>
</tr>
<tr>
<td>Masonry – labor revenue</td>
<td>Masonry – labor COGS</td>
</tr>
<tr>
<td>Metals – materials revenue</td>
<td>Metals – materials COGS</td>
</tr>
<tr>
<td>Metals – labor revenue</td>
<td>Metals – labor COGS</td>
</tr>
<tr>
<td>Wood and plastic – materials revenue</td>
<td>Wood and plastic – materials COGS</td>
</tr>
<tr>
<td>Wood and plastic – labor revenue</td>
<td>Wood and plastic – labor COGS</td>
</tr>
</tbody>
</table>

You should see a pattern in these revenue and expense accounts. Each revenue account represents a category or logical division of the goods and services provided by your business. For each revenue account, there is a corresponding cost of goods sold account. This allows an overview of the company's direct expenses in comparison to revenues by category - concrete, masonry, wood & plastics, etc. - and a calculation of the gross profit percentage and profit margin by category.
**Items**

Items represent the products and services that your business sells. You may have many items for each of the revenue/expense account categories in your chart of accounts. Using items, you enter the details about what you buy and sell, then “map” or link the detailed items to the more generalized accounts in the chart of accounts. You can map many detailed items to a single account in your chart of accounts. This allows a greater level of detail in the item list while keeping the chart of accounts list concise.

**NOTE** logically – a single item would be mapped to a matching pair of accounts in the chart of accounts; e.g. a Masonry hourly labor item would be mapped to masonry labor revenue in the item setup dialog box under I sell this item, and to masonry labor COGS under I buy this item.

Items focus on revenues; they are the goods and services your company sells. Use service items for labor, and non-inventory items for materials. The non-inventory name just indicates that you are not tracking unit quantities or unit costs; they are still goods and materials that you hold in inventory.

To track unit quantities and unit costs, use inventory items, but be forewarned; do not use inventory items lightly. Using inventory items means that you are tracking and entering unit quantities when you buy and sell as well as reconciling your accounting records to the physical quantities on hand in between buying and selling. This is not an item type for the faint-hearted!

**Direct costs**

Direct costs are the costs of the products and services sold. These are the costs involved in job costing. Direct costs can be directly associated with a job and can be identified as a part of the finished product. For a mason, direct costs would include the costs of bricks and mortar, as well as the cost of the labor to prepare the mortar and lay the bricks.

Direct costs are distinguished from indirect costs, or overhead. Indirect costs are costs that cannot be identified in the finished product, even though they were incurred, indirectly, in the process of completing the job. Examples of indirect costs are rent, insurance and administrative payroll. Indirect costs are not included in job cost reports. Direct costs are categorized on the profit and loss report as cost of goods sold, whereas indirect costs are categorized as operating expenses.

**Standard costs**

Standard costs represent direct costs that include a calculated (or estimated) portion of related costs that are not billed separately to your customers. They are often theoretical calculations, done in a spreadsheet, that give a more accurate picture of the direct costs involved in a job. Examples of standard costs include:

- For every 100 feet of electrical cable installed, on the average we use 20 staples, 6 wire nuts and 2 electrical connectors. The staples, wire nuts and connectors are purchased in bulk and not individually billed to the job. The purchase price for this item is the cost of the electrical cable alone. The standard cost for the item includes the cost of the cable, staples, wire nuts and connectors.
- For every hour of labor paid, we also incur 8.9% in payroll taxes and 5% in worker’s compensation. When creating this labor item, the purchase price is the hourly cost of the labor. The standard cost includes the hourly cost of the labor, plus the payroll taxes and worker’s compensation.

While you should carefully identify your standard costs, they are used only in job cost reports; they are not the costs stored in the general ledger or reported in your financial statements.

**NOTE** When creating items in Small Business Accounting, the item dialog box asks for three different amounts: sales price, purchase price and standard cost. Unless you override the standard cost field, your purchase price becomes the standard cost. The wonderful thing about standard costs is that if you invoice using an item that has a standard cost, the standard cost will appear in job profitability reports, even though you did not assign the cost to a particular customer or job when it was purchased.
Secrets of job costing
OK, these aren't really secrets, but if you want to use job costing effectively, you need to understand these three concepts. The people who are frustrated with job costing most likely don't understand these concepts.

1. Job costing uses items. You should use items when purchasing as well as when selling goods and services if you want to use job costing. This means using an item type instead of an expense type on a check, bill or credit card charge.

2. Items must be set up properly. In the new item dialog box, you select the I buy this item check box for items that are purchased, the I sell this item check box for items that are sold, and fill out the standard cost field if you are using standard costs.

3. The same items used to record costs for a job must be used to invoice for the job. Expenses become revenues, and to be able to compare direct costs to gross revenues, you must use the same item on both sides of the transaction.

Of these three secrets, the third may be the most difficult to achieve. Often the bookkeeper meticulously enters bills and records checks using items, and has the items set up properly, only to have the owner invoice the job using a generic item rather than the items used to record costs for the job. If this is your situation, you have two options: either re-educate the owner about proper invoicing procedures, or, if the owner insists on a simple invoice for the job, let the owner create job invoices in Excel or Word, and create a matching invoice in Small Business Accounting using the proper items.

Think about how you purchase for a job
Can you identify your customers when you purchase materials for a job? If so, then you can enter the job name in the bill or check and associate the expenditure with a specific job. Now you can use Small Business Accounting not only to track your expenses by job, but you can also convert those bills into invoices, making sure that all expenses are accounted for and nothing falls through the cracks. By using the same item on the bill that is used on the invoice, your job cost reports will show cost, revenue and profitability by item.

Do you have items that are purchased in bulk and later allocated to a job, so that at the time of purchase you don’t know which customer will receive each item? If so, then you can use standard costs. Since you don’t know which customer will receive the item being purchased, you cannot assign the cost to the customer at the time of purchase, but by using standard costs, the standard cost will show in job cost reports when the item is used on an invoice.

Do you have large dollar amount items that you keep in stock, and don’t purchase for a specific customer? Use inventory items to track the cost of these items, and your job profitability reports will show revenues and actual costs on a first-in, first-out basis.

Job cost reports
Job profitability summary and job profitability detail reports show revenues, standard costs, billed costs, the gross profit margin by dollar and percentage, grouped by customer. Within each customer, these reports show each invoice and each item with the profitability detail by item. These reports may be filtered by customer to see the details for a specific customer, or filtered by margin to see the most or least profitable items for any time period. Keep in mind that the standard costs you see on these reports are theoretical costs, and are not used in the financial statements.

The job estimates vs. actuals summary and job estimates vs. actuals detail reports compare quotes to bills and invoices, showing the variance between estimated costs and actual costs and the variance between estimated revenue and actual revenue. These reports are useful for controlling costs during the progress of a job, and as a guideline for preparing quotes for new jobs.

About the author
Stan Snyder is a certified public accountant with over 25 years’ experience dealing with the accounting and computer problems that small business owners face. He teaches computerized accounting classes at Colorado Mountain College, and regularly consults with small business owners using accounting software of all types.
Tracking Billed Amounts by Order

A common burden in most falsework businesses is to track and report the amount you’ve billed your customer. We’ve designed Quantify so that you can easily summarize your rental and other charges as needed.

Most of the time people track these items by job site or customer but Quantify offers an additional feature. If you need to track costs per order for job sites having multiple orders, you can set your billing setting to invoice ‘by order’. Orders have an additional field for tracking the amount that the order is approved for.

As you generate invoices you can summarize these costs using the invoice pivot. In the invoice pivot, drag and drop the ‘PO Approved Amount’ cell onto the main grid and you can compare the approved amount with the rent total. It’s that simple.

Also note the other cells above the grid. You can drop these into the grid instead of (or in addition to) the cells already present. This allows you to summarize values in many ways including by:
- Date
- Purchase or Work Order
- Customer
- Job or groups within a job (such as a scaffold tag)

You can also define various filters to further narrow down the data you’d like to examine. The print preview of the report can be emailed as PDF in one button click or saved to any version of Microsoft Excel.

The pivot that is built into Quantify is very powerful, allowing you to summarize data in any way imaginable.
Viewing your Product History

Continuous improvement of business practices involves looking at your history to see what worked and what can be improved. Knowledge of the movement of your equipment is vital to keeping your business healthy - both financially and operationally. While equipment rental might not be your primary moneymaker, the lack of available equipment can be the biggest cause of losing money. For some companies, having equipment available allows you to provide labor, as well. Since renting equipment from other companies (re-rent) can quickly escalate costs, it is vital to see the movements of re-rent to effectively manage returns while minimizing freight costs. The areas for improvement are countless and product history provides the insight needed.

Historic movements of products are calculated, summarized and saved, allowing you to examine a slice of time. The key idea behind product history is that you can see your asset value, cost, price to your customer, and weight. The data is summarized and/or filtered by whatever value you'd like, such as by a job site or owner (what you own and what your vendor owns that you're renting to your customer). At the root of the history is a daily balance. This daily balance shows the total quantities located at a job site or branch office/laydown yard. When parts are delivered to a location, the location's balance increases, and when parts are returned the balance decreases. This daily balance is used to calculate the daily rent, cost, and weight.

To include the product history for a job site, select this option on the job site’s General tab before you begin shipping products to the site.
Once you have clicked on the Product History pivot, select the month or months you wish to see data for and Quantify will calculate the daily balances throughout your company and store the balances for quick summarization later.

After the data is calculated for the ranges that you want to see, simply select the start and end dates and load the data.

If you want to summarize the data by, for example, location and owner as shown, drag and drop those columns onto the row headers. Notice that after the location is dropped, the data is grouped by the value (location, then owner).
The daily balance is displayed for each of these, as seen in Figure 2.

![Figure 2 - Product history grouped by location and re-rent owner](image)

In Figure 2, note that the daily balance increases on 4/2 for some parts as deliveries are made. You see not only the total by location, but also the quantity that is owned by you and by the vendor you are renting from (Alverca Concrete, in this case). If there were multiple re-rent owners, you would see each one here. Compare this with Figure 1 and you'll see that the totals match for each day.

Now let's swap out Balance with Rent to see the total rent value for each day.

![Figure 3 - Displaying Rent instead of Daily Balance](image)

After swapping these values we can see the value of the rent in the main cell (rent rate * daily balance) in Figure 3 below.
Another powerful feature in the pivot is the ability to filter the data. To do this, hover your mouse over one of the buttons that you want to filter. You’ll see a small filter icon appear in the upper right corner of the button.

When you click this button a list of values appears. From this list you can select all values (the default), one value, or several. Let's look at the equipment that is owned by Alverca Concrete by filtering on the owner. (Remember, what you own is blank under Owner in the list.)

The location and value of the rent for each day is shown in Figure 4 below.

Sorting is accomplished by clicking on the sort arrow. Note that all buttons have an up and down triangle, which indicates the sort order.

The pivot control has a print preview that allows you to save this data to Excel (XLS or XLSX) or PDF for further analysis or sharing with employees or customers.
How to Create an Inventory Report

At any time you can see the inventory you have in your laydown yard or at a job site by selecting the location you want to view and the Products tab.

If you want an inventory report for one or more locations, you can create a Quantity Pivot.

First select the location you want to view in the organization tree. If you want to see just one job site, select it in the organization tree. If you want to view multiple job sites, select your Company.

On the Products tab, under Reports, select Product Quantity Pivot.
If you selected your company in the organization tree, all locations will be included in the report by default. To filter the locations included in the report, move your mouse over the Name button and click on the funnel icon, which will appear in the right corner. Check/uncheck job sites you wish to include.

Customize the report to your needs. To view quantities on rent, drag the On Rent control to the Grand Total column. If you also wish to see equipment for rent (at the branch office/laydown yard), drag the For Rent control here, too.
You can also remove a field you don’t want to include (such as Location Type) by selecting it and dragging it to the top of the window next to the other, unused controls.

Next click the Print Preview button in the upper left of the window to view and format, save or email your report.
Reporting Options

You can customize reports to display the way you’d like to view them. Because this is done on the Reports tab of Global Options, which affects all users, your employees will be able to produce consistent reports.

All reports in Quantify contain fairly consistent data and formatting, such as what is displayed in the header and footer. Other reports, such as invoices and shipments, contain items specific to them, such as a signature block for approval by your customer.

**Color for Shipment Header**
Sometimes it’s handy to be able to identify the type of shipment (delivery, return, or transfer) in a stack of paperwork. To assist with this you can change the color on the shipment header by selecting the color in the dropdown list.

**DEL-00727**
DELIVERY (COMPLETED)

- **Number**: DEL-00727
- **Planned ship**: 12/15/2010
- **Actual ship**: 12/15/2010
- **Received**: 12/7/2010

Created: 12/7/2010

- **Bilable**: Yes
- **Rate Profile**: None
- **New Customers**: Order: 0579-009
- **Rent Start**: 12/15/2010
- **Rent Stop**: Return Rent Stop:
**Logo to use on Reports**
Your company brand is important so your logo can be displayed on most reports. To include your logo, click on the Add button and select a .png file. This file is now stored in the database and is available to all users, whether working remotely or not.

**Invoice**
Invoice items are grouped in a two sections to make it easier to differentiate the costs: Rental and Non-Rental Items. The 'label for additional charges' and 'label for rental items' control the text heading in these sections and are highlighted below.

The ‘remit to’ and company name that appear on the invoice are also controllable and shown below. Note that the address under the company name comes from the billable address of the parent branch office.

**All Reports**
The options within ‘All reports’ cover the visibility and display of items at the end of the report and bottom of the page. First is the approval section; shipments, estimates, and invoices include a few lines for a signature. If the checkbox(es) for the signature details section are checked, then these lines will be shown as below.

The text for the footer is optional and, if entered, will display in the report centered at the bottom. Additionally, if you would like to include the date and time that the report was print previewed, check the ‘Show date/time created’ checkbox. All three of these options are highlighted below.
Using your Logo

Using your own logo on your invoices and other outgoing documents gives your company a recognizable brand and a professional image.

In addition to being able to customize your reports, Quantify makes it easy to use your logo. Most reports in Quantify include it and specifying the file to use is simple. Once you tell Quantify to use your logo it will be shown on the print preview of the estimate, deliveries, returns, and invoices for everyone in your company, regardless of where they are on the network (remote or local).

With your favorite image editing software you simply create a 225 x 95 size png file (portable network graphics with a .png extension) with your logo in it. Then go into Quantify options (Tools menu, Global Options item). On the Reports tab, click the ‘Add’ button and select your logo file. There’s a handy preview window below the selection in which you can see the file. The preview is just a little bigger than 225 x 95, so you should see a small grey border around your logo. If your text is overflowing the border, open the file in your image software and resize it so it fits.

Next time you print preview a report, you’ll see your logo on the report. Your logo even shows up when you export to PDF.
Quantify Web & Mapping

Quantify Web

Quantify Web allows you to make your data available from your server to the remote offices and employees within your enterprise. No specialized VPN or remote desktop virtualization is required. Quantify Web is installed on a Windows Server with IIS exposed to the internet and enable two key features:

- Remote Connectivity
- Mobile Web

Remote Connectivity
Remote employees install the same Windows-based client software but use a different method to connect to the database. Within your network employees access Quantify directly, while the remote users connect via the website provided by Quantify Web. The data through Quantify Web is passed back and forth in compressed binary, providing optimal speeds while loading large lists of data. With high-speed internet access remote users rarely notice they're working over the internet. Enterprises that require secure communication can lockdown the website using a digital certificate, ensuring that all data is encrypted using SSL.

Mobile Web
The Quantify Web website provides miniature web pages viewable on any browser but optimized for mobile devices, such as Blackberry, iPhone and iPad. This website mimics the main view of Quantify, allowing you to easily locate equipment or view quantities stocked at various locations in real-time. Maps of active locations and serialized assets are at your fingertips for quick locating, driving directions, and other location-based services.
iPhone  
Mobile Device  
Laptop

Internet

Web Server with **Quantify Web**  
Your Company’s Network
Database Connection Options

**SINGLE USER**
Quantify and database are installed on a single desktop computer and not shared with any other people on the network. Good for companies with a single person that controls all inventory and billing.

**SEVERAL USERS**
Quantify and database on same desktop computer, shared with a few computers on a network. Good for companies with a few people controlling inventory and billing.
SMALL OFFICE CONNECTION
Database is installed on a server and shared with everyone on the network. Companies with more than a few employees that manage inventory use this method. The recommended number of users is approximately 100 users per server. Quantify can also be scaled to multiple servers for additional users.
**Enterprise Connection**
The database is installed on a server and shared with everyone on the network. Quantify Web is also installed on the same or a different server. With the server exposed to the internet, remote Quantify users can connect to the same data. Quantify Web also has a website that allows users without Quantify to view equipment with a web browser.

Remote installations of Quantify can connect via the web, using the internet as a network.

Web browsers can view equipment using the Quantify Web website.
Mapping in Quantify

Quantify contains a wealth of features that allow you to view the physical location of entities within your company by utilizing Google location-based technologies. These location services are available on the website within Quantify Web as well as in the Windows version of Quantify. An internet connection is required for these features. Mapping is in three major areas:

- Driving directions and location of any address
- Mapping job sites, branch offices, and laydown yards
- Locating serialized assets (i.e. equipment and trucks)

Addresses
Each address in Quantify includes buttons that allow you to map the location and get driving directions to or from the address. Let's take a look at both of these with a starting address in Hayward, California.

Mapping a Location
To map the location of this address simply click on the world icon. This displays the map in Google Maps as shown below.

![Map of Hayward, California](image1)

Driving Directions from One Location to Another
Driving directions are also simple and require just one more step: the destination or starting address. When you click the driving directions button a dialog box pops up asking you for the second address. If you want to switch starting and destination addresses, click on the double arrow button.

![Driving Directions dialog box](image2)

Location Mapping
Locations (branch offices, laydown yards, and job sites) can all be displayed on a single map. The resulting map depends upon which Quantify product you’re using. Both Quantify Web and the Windows Client.
software map locations similarly, but the Quantify Web website uses Google Maps (web-based) and the Windows Client uses Google Earth (Windows-based). Shown below you can see the ‘Burnside Bridge Shoring’ job site displayed in both applications.

**Map in Windows Client**
Clicking the Google Earth button above the organization tree displays all locations that are currently active.

**Map in Mobile Web**
In the Mobile Web, clicking on the map button next to the organization dropdown list draws the same map as the Windows Client, but does so in Google Maps on the web. This functionality is available on any device that has a web browser.
**Serialized Equipment Locating**
Quantify also allows you to track the location of individual serialized assets from both the Mobile Web and Windows Client (again, using Google Maps Web and Google Earth). This handy feature simplifies tracking serialized parts by displaying a single part number in the list and then allowing you to drill down on the detail of the part from within the map itself. In the map tooltip you can see the inspection information, damaged status, and other details.

**Location in Windows Client**
Viewing locations of serialized parts is simple process. First click on the part that you want to see and select the serial number from the underlying list. Then click the Google Earth button.

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Description</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>000SRL</td>
<td>Self Retracting Lifeline</td>
<td>Rose Fall Protection</td>
</tr>
<tr>
<td>000SRL</td>
<td>Self Retracting Lifeline</td>
<td>Alpha Rentals</td>
</tr>
</tbody>
</table>

**SN:0001SRL**
- **Part Number:** 000SRL
- **Description:** Self Retracting Lifeline
- **Stocked As:** On Rent
- **Manuf. Serial No.:** 5062181
- **Damaged Status:** Not Damaged
- **Inspection Status:** Needs Inspection
- **Next Inspection:** 1/19/2009
- **Last Inspection:** 1/12/2009
- **Warranty Expiration:** 1/5/2009
- **Directions:** To here - From here
Location in Mobile Web

The Mobile Web uses the same steps as the Windows Client. Click on the hyperlink for the part, and select the serial number from the underlying list. Then click the Google Earth button.
Asset Tracking

One of the newer technologies that has recently become affordable is asset tracking via the Global Positioning System (GPS). GPS is a constellation of satellites that transmits signals, which enable GPS receivers to determine their current location in almost any weather, 24 hours a day. Created by the US government, the system was made available for civilian use in the 1980’s. The broad availability of GPS receivers is allowing companies to rethink their operations in ways unimaginable only 5 years ago. Here are a few examples of how GPS can be used in your scaffolding company:

- History of locations: you can easily trace the route of an asset on a job-to-job transfer on a map - even if you weren’t aware that the equipment was moved.
- Theft: the ability to rapidly direct local authorities to your stolen assets is critical to quick recovery and eliminates lost rental revenue.
- Boundaries: setting an electronic boundary alarm alerts you when items are leaving or entering an area, instantly notifying you when your equipment moves.
- Routing: efficient delivery routing improves service and increases customer satisfaction.

A GPS receiver is attached to an individual asset, such as a truck or a swing stage. Receivers have differing features, depending on the information you need. For example, GPS receivers on delivery trucks require a high frequency of location reporting for efficient routing, particularly through dense traffic. In contrast, high value assets that remain on job sites might only need to report locations once a day or on-demand.

Quantify’s serialized inventory feature allows you to track your assets using these exciting new technologies. You can draw maps of where your equipment currently is and where it has been.

Using Quantify to locate fleet and other assets is the key to improved efficiency as you have the ability to track equipment and bill for rent in a single software solution. Since Quantify allows unlimited users, everyone in your company can participate in the efficient management of your business.
Customizable Security
Roles and Permissions

Quantify places no limits on how many employees can access your data and we don’t charge per user. That’s because we know that many different people in your company may be involved in managing your equipment. Everyone that needs to can log in to Quantify and get the information they need. This includes allowing your customers to log in and see their jobs, invoices, and other details, if you wish. Quantify gives you the power to control what access to data users have.

Quantify is easily used with hundreds of concurrent users at no extra cost.

Most businesses have different employees that are responsible for different tasks. In Quantify these tasks and areas of responsibilities are tied to specific software features. For example, a billing clerk needs to create invoices, and a salesperson needs to be able to create estimates. Each of these employees is assigned a role and this role dictates what the person can and cannot do. Roles are set on the user dialog box in the role dropdown list as highlighted below. You can change the role for any of your users at any time. The next time they log in the new role will take effect.

There are eight roles in Quantify - those shown below plus the Administrator role, which has no limitations. With the exception of the Administrator role, each of these can be renamed. Additional roles can be created, if needed.
Modifying permissions to match the tasks that your employees perform is simple. Log in as administrator and, from the Users tab, select the Security dropdown menu (shown at the top of this article), then select the Edit Permissions menu item. From here you will see the list of roles:

Either double-click on the role you want to change or highlight it and click the Edit button above the list. You’re now presented with a tree view of permissions, which are organized by functional area. The permissions include access to reports, pivots, and actions that modify data.

There are essentially three types of permissions:

1. **Invisible** – If the view item is unchecked then a user with this role won’t be allowed to see this feature. For example, if the View Estimates item is unchecked then the entire Estimates tab and all related controls will be invisible when that user logs in.

2. **Visible, not enabled** – If the view checkbox is checked but the Add/Edit items are unchecked then the user will be able to see the items but won’t be able to create or edit them. Note that there are property levels that will be further nested.

3. **Visible and enabled** – This permission essentially allows full access without limitation, unless there are further items under the tree that can be modified.

There are also per-property permissions. Above you can see that the role can modify the rate profiles (the rates you charge a customer) but can not change the job cost.
Refining Security by Location

The control of roles and permissions is a necessary and important feature, but it’s often not enough for larger organizations that have offices in multiple locations around the globe.

Larger companies need to specify that a certain user (the individual person) can do what their role says they can do, but only in a specific location. For example, you may have billing personnel in two different branch offices that can create invoices for their location, but not each other’s location.

In Quantify this feature is referred to as ‘location-based’ security and is turned on by checking a box in Global Options. Not all roles have the ability to modify these lists.

Multi-Assigning Users to Jobs

When location-based security is on, the people that have location-based roles are prevented from performing tasks in locations that they’re not assigned to. To assign users to their locations, go to the Users tab, click on the Security dropdown button and click the “Assign Users” menu item.

This will display the location tree view with checkboxes next to the job sites. Simply select the person (user) and then check the boxes next to the jobs they’re assigned to.

Not all roles are location-based. Administrators can do everything. And, there is a ‘corporate manager’ role that is bound by permissions but not location.
**Job Site Security**
The list of people assigned to a job site can be viewed on the job site's Security tab. To change the assignments you can use the 'multi-assign' function above or you can edit the job site. On the job site's Security tab, click the Change button and check or uncheck the boxes next to the people that need access to the job.
**Branch Office Security**
Branch offices and laydown yards have 4 lists.

- **Assigned To List**
  The ‘Assigned To’ list allows these users to perform many tasks. To see what tasks these include, click on the hyperlink above the list to display a summary:

- **Controlling branch-to-branch transfers**
  The ‘Can Ship From’ and ‘Can Ship To’ lists allow you to control who can ship and receive equipment in various locations. These lists are present because typically only a few people at a branch office are responsible for materials that flow in and out of the branch. When a branch to branch transfer occurs in a shipment, the From and To locations are filtered based on these lists.

- **Default for Job Lists**
  Oftentimes a branch office has the same employees assigned to all job sites. The ‘default for job’ list automatically assigns these people to newly-created job sites. This eliminates the need for a location manager to have interaction with each new job site, since not all users can modify the permission lists.

- **Viewing Location Assignments**
  To view the people assigned to the various locations there are several reports available on the Users tab’s Reports dropdown menu. When an individual is logged in they can see their locations using the ‘My Locations’ report (which is disabled for the Administrator, since the Administrator can access all locations).
System Requirements

Quantify is a Windows-based program, allowing you to utilize the skills that you already have. Hardware requirements are designed to work with your existing infrastructure, minimizing your costs in IT.

Automatic Updates
Quantify is installed with an auto-update mechanism that keeps end-users up to date with the latest features and enhancements.

Client Software System Requirements
- Supported Operating Systems: Windows 7, Windows Vista SP2, Windows XP SP3
- Processor: 400 MHz processor (Minimum); 1GHz processor or greater (Recommended)
- RAM: 256 MB (Minimum); 512 MB (Recommended)
- Hard Disk: Up to 500 MB of available space may be required
- CD or DVD Drive: Not required
- Display: 1024 x 768, 256 colors (Minimum); 1024 x 768 high color, 32-bit (Recommended)
- Internet: Internet connection required for installation and automatic updates. If connecting to Quantify Web, recommended speeds are 8Mbps upload and 3Mbps download.

SQL Server Requirements
- SQL Server 2008 or 2008 R2 64-bit or 32-bit, Express and above
- Processor: 1 GHz processor (Minimum); 2GHz processor or greater (Recommended)
- RAM: 1GB (Minimum); 2GB or more (Recommended)
- Hard Disk: Up to 1GB of available space may be required
- CD or DVD Drive: Not required
- Display: 1024 x 768, 256 colors (Minimum); 1024 x 768 high color, 32-bit (Recommended)
- Internet: Internet connection required for installation and automatic updates

Quantify Web
- Server Components: IIS, exposed to the internet
- Internet: High-speed internet required

PREREQUISITES
- Microsoft .NET Framework 3.5 (50 MB)
- Microsoft ReportViewer Control 2010 (3 MB)

To keep the size of the download to a minimum for installation and automatic updates, the prerequisites that Quantify requires are not included in the initial setup.

If any prerequisites are missing on your computer you will see a Prerequisites Wizard automatically appear. The Prerequisites Wizard will notify you of the files needed and step you through the process of downloading and installing them.

After all prerequisites have been installed, the Quantify installation will begin.
Converting your Data

Purchase of a branch office includes set up and import of the following data (provided electronically by you (ex: Excel format)):

- Customers and rental vendors, including addresses
- Products (part number, description, weight, list price, cost, sell price) and Product Catalogs
- Daily or 28-day Rental Rates
- Billing methods you use
- Branch office/Laydown yard names and addresses
- Re-rented equipment by vendor, current location balances
- Current branch office balances
- Serial numbers and location for any serialized inventory
- Users
- Numbering options for deliveries, returns, transfers, etc.
- Logo to use on invoices from your electronic artwork
The Quantify API

At the heart of Quantify is an API (application programming interface) that allows developers to drive any part of Quantify. Everything that you can do in Quantify can be enhanced by custom code using any .NET language.

As an example of how the API can be used, assume that your company has a proprietary estimating system and you want the material list and consumables that this estimating system produces to create a shipment in Quantify. Following is an example in VB.NET of how you would accomplish this. This example creates a shipment in Quantify then loops through a string array of parts (that your customized application passes in to this method) and saves the shipment.

Visual Basic

```
' Create new shipment. Note that instead of 'NewDirectShip' below we could add a reservation or a shipment in a different status
Dim ship As Shipment = _
    Shipment.NewShipment(ShipmentStatusType.NewDirectShip)

' Set the ship date and rent start date to today
ship.ActualShipDate = Now.ToShortDateString()
ship.RentStartDate = Now.ToShortDateString()

' Set the ID where the shipment is going
' from and where it is going to
ship.FromStockingLocationID = fromLocationID
ship.ToStockingLocationID = toLocationID

' Loop through YOUR list of materials (this can be any list, we'll assume it's an array of strings, PartNumber, Quantity
For Each item As String In myListOfParts

    ' Loop through the parts in the shipment until a match is found
    For Each part As ShipmentProduct In ship.ShipmentProducts

        ' If matching part number
        If part.PartNumber = item(0) Then

            ' Set the quantity
            part.ActualQuantity = item(1)

            ' Since we've found the part, exit the loop, no need to continue
            Exit For
        End If
    Next
Next
```
Invoice Export to File

Summary
The invoices generated in Quantify can be shared with various accounting software (check with your software vendor for compatibility). This is accomplished by exporting a file from Quantify, opening and modifying the file if necessary, and then importing the file into your accounting software.

Exporting from Quantify
To export invoices, select the invoices you would like to export. Then from Quantify's Export menu select the "Export Selected Invoices to File..." menu item. This will prompt you for a file name to save these invoices to. The invoices that were successfully exported will display 'Exported' in the export status column. You can reset the 'Exported' value back to 'Not Exported', should you wish to export them again.

Note: The items in the file are separated by a tab character.

Depending upon your accounting software features, you can match exported fields to various items. For example, matching a job site in Quantify to your accounting job will give you various job costing features. Check with your accounting software administrator for more information.

Tip: In Quantify you can select more than one invoice at a time. To do this highlight (single click) an invoice, then hold down the Alt key on your keyboard while clicking on another invoice; you can select all of the invoices between the first and second invoice selected. Or select an invoice and press the Ctrl key to single-select invoices to add them to the selection.

Exported Columns
If an invoice has a single rent or unit price item then there will be a single line for the invoice. If there are multiple unit prices then a line will be included for each item. All of the fields below will be included for each invoice line item in the exported file:

Invoice Header Items
- Type: This will have a value of 'Invoice' or 'Credit'.
- InvoiceNumber: Corresponds with the invoice number in Quantify.
- Date: The invoice date.
- Created: The date and time that the invoice was created by Quantify.
- CustomerName: Name of the customer.
- CustomerNumber: This is the number associated with each customer and is unique for both customers and vendors in Quantify.
- CustomerAccountingID: This is the ID that is entered in the customer dialog box. If the ID isn’t specified for the customer then this value will be blank. The ID is not required to be unique in Quantify so that it can be used to combine multiple invoices by the same ID, if needed.
- Order: The order number on the invoice (orders are specified on the Billing tab of the customer).
- OrderApprovedAmount: The amount approved by the customer.
• **JobSiteName**: Name of the job site or group that the invoices are assigned to.
• **JobSiteNumber**: This is the number that is specified in the job site dialog box.
• **JobSiteAccountingID**: ID assigned to the job site or group. This is blank if an ID isn’t specified. This ID is entered in the job site dialog box.
• **RentGL**: Corresponds to the rent GL code in Global Options on the Accounting tab. This is intended to be matched to the accounting GL code when needed.
• **RentCC**: Corresponds to the rent cost code in Global Options on the Accounting tab. This is intended to be matched to the accounting cost code for rent when needed.
• **Tax(n)Name**: This item corresponds to the name of the tax rates on the job site, of which there are two, Tax1Name and Tax2Name. There are columns for Name, Rate, Agency, Description, and the total tax for each item from the invoice.

Note: The exported file uses a column name of ‘JobSite’ for both job sites and job site groups. If you’ve changed this organizational name you’ll still see the column heading of JobSite for all of the job sites and job site groups.

**Invoice Cost Items**
The rental and/or unit price items (consumables and services) in the invoice will each be included along with the header items. The following fields represent the value items in the invoice:
• **IsTaxable**: the values are true/false. Specifies whether the rent or unit price is taxable.
• **InvoiceRent**: Corresponds to the total value of rent on the invoice.
• **InvoiceUnitPrice**: The invoiced value of the line item for a specific unit price.
• **Units**: For the rental line item this is the value from Global Options (Accounting tab). For unit prices this is the units from the unit price item that appears on the invoice (for example, “each”).
• The remaining items correspond with what is entered on the unit price dialog box for each item:
  - **UnitPriceName**
  - **UnitCategory**
  - **UnitPriceDescription**
  - **UnitPriceAccountingType**
  - **UnitPricePerUnit**
  - **UnitCostPerUnit**
  - **UnitWeightPerUnit**
  - **UnitPriceAccountingID**
  - **UnitPriceCC**
  - **UnitPriceGL**

**Troubleshooting**
If any issues are encountered when exporting, you will be notified. To view the problems, open the file in Excel or any text editor. Any errors, such as values containing tab characters, will be reported on a row in this file.

An invoice will only be marked as ‘Exported’ if the row is valid and contained no errors when exporting.
The Avontus website includes lots of information to help you use your software.

**How-to Videos**
Short how-to videos walk you through features in just a few minutes.

<table>
<thead>
<tr>
<th>Video Title</th>
<th>Published</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reset Rental Invoices</td>
<td>June 2011</td>
<td>2 min</td>
</tr>
<tr>
<td>Tips for Selecting Purchase Orders and Work Orders</td>
<td>April 2011</td>
<td>1 min</td>
</tr>
<tr>
<td>Creating Purchase Orders &amp; Work Orders</td>
<td>April 2011</td>
<td>2 min</td>
</tr>
<tr>
<td>Damaged &amp; Missing Items: Out of Service</td>
<td>April 2011</td>
<td>5 min</td>
</tr>
</tbody>
</table>

**Avontus News**

We frequently post tips and new feature information on our website under ‘Recent News’. Or, subscribe to our news feed from within Outlook. Whenever we post a news item you’ll automatically receive it in a special Outlook folder.

To subscribe to the feed locate the ‘RSS Feeds’ folder in your Outlook mail folders. Right-click on this folder and select the ‘Add a New RSS Feed...’ menu item.
This displays a dialog box where you enter the location for our feed, http://www.avontus.com/blog/syndication.axd, then click the Add button. An additional dialog box is displayed in which you can click the Yes button, unless you want to configure more advanced options, such as how often to check for new posts and the name of the folder.

Once subscribed you’ll see an ‘Avontus Blog’ folder that you can click on to see all of the latest news. When the folder is bold it indicates that there are new posts that haven’t been read. Simply click on the folder to see the news items.