

Quantify Introduction*

Everybody starts here. This session is required by all end-users before going through other sessions. This session introduces Quantify and the major screen sections and features, covering the information below.

**Prerequisite: The Introduction session is required for all users and must be completed before continuing with additional training.*

View Recorded Quantify Introduction Webinar

Agenda	
Catalogs	
Product Catalog Basics	<ul style="list-style-type: none">• What is the Product Catalog?• Add Products• Add Categories• Associate Categories to Products
Consumable Catalog Basics	<ul style="list-style-type: none">• What is the Consumable Catalog?
Additional Charges	<ul style="list-style-type: none">• What are Additional Charges?
Recurring Charges	<ul style="list-style-type: none">• What are Recurring Charges?
Rate Profiles	
Rate Profile Basics	<ul style="list-style-type: none">• What are Rate profiles?• Rental Rates• Sale Prices• Replacement Costs
Tree Tabs	
Organization Tab	<ul style="list-style-type: none">• Organization Tree• Location Definitions• Add/Edit/Delete• Mark Inactive• My Options• Find Location
Customer Tab	<ul style="list-style-type: none">• Customer Tree• Order Numbers• Add Customer• Customer Contacts
Vendor Tab	<ul style="list-style-type: none">• Vendor Tree• Add Vendor
Users Tab	<ul style="list-style-type: none">• User Grid• Role Basics
Grid Tabs	

Products Tab	<ul style="list-style-type: none"> • Products Grid • Inventory and Focus • Available vs. On Rent • Owned vs. Re-Rent inventory • Reserved • In Transit • Discrepancy • Status Bar • Categories • Filters
Estimates Tab	<ul style="list-style-type: none"> • Estimates Grid
Shipping Tab	<ul style="list-style-type: none"> • Shipping Grid • Column Order and Visibility
Transaction Tab	<ul style="list-style-type: none"> • Transaction Grid
Invoice Tab	<ul style="list-style-type: none"> • Invoice Grid
Basic Job Sites and Shipments	
Job Sites	<ul style="list-style-type: none"> • Create Billable Job Site • Create Non-Billable Job Site
Basic Shipments	<ul style="list-style-type: none"> • Create Delivery through right-click menu • Create Return through right-click menu