

About the Global Options Dialog Shipments and Scaffolds Tab

Global Options

General Requests Billing Reports Names and Labels Products **Shipments and Scaffolds** Job Site Options Quantify Web Notifications

Shipments **Scaffolds**

Default shipment view filter
 Show All Dates

Color for shipment header

Delivery: Transparent
 Return: Transparent
 Transfer: Transparent

Shipment permissions

Allow editing of shipment number
 Allow editing of minimum days
 Allow rent stop date to be modified
 Allow editing consumable sell price
 Allow editing and prorating of rent rate
 Allow editing of additional charge description
 Allow editing of recurring charges
 Allow editing of additional charge weight

Default rent stop date on new returns to today plus 0 days
 Default rent start date on new deliveries to today plus 0 days

Custom lists for shipments and scaffolds

When used, the values for custom lists below are managed on the Custom Lists menu.

List 1: List 1 Required
 List 2: List 2 Required

Properties for shipments and scaffolds

When shown, the values for the properties below are set on shipments and scaffolds

Text 1: Custom Property 1 Required
 Text 2: Custom Property 2 Required
 Yes/No 1: Yes/No 1
 Yes/No 2: Yes/No 2

Changes to global options affect all users

OK Cancel

Global Options

General Requests Billing Reports Names and Labels Products **Shipments and Scaffolds** Job Site Options Quantify Web Notifications

Shipments **Scaffolds**

Allow scaffold tracking
 Allow scaffolds to be set completed if there are balances
 Allow scaffold transfers
 Checkbox to create inspection from new activity is checked by default

Built-in scaffold list names

Priority: Required
 Project: Required
 Step: Required

Label for tab in main window
 Scaffold Register

Scaffold statuses

Name	Active	Description
1 Estimate	Yes	Planned or estimated. Used for forecas...
2 Custom 1	No	Custom value
3 Custom 2	No	Custom value
4 On Rent	Yes	Default value for new tags. Scaffold is ...
5 Custom 3	No	Custom value

Default rent stop date on new returns to today plus 0 days
 Default rent start date on new deliveries to today plus 0 days

Custom lists for shipments and scaffolds

When used, the values for custom lists below are managed on the Custom Lists menu.

List 1: List 1 Required
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Properties for shipments and scaffolds

When shown, the values for the properties below are set on shipments and scaffolds

Text 1: Custom Property 1 Required
 Text 2: Custom Property 2 Required
 Yes/No 1: Yes/No 1
 Yes/No 2: Yes/No 2

Changes to global options affect all users

OK Cancel

The two tabs in the **Shipments and Scaffolds** tab enable you to determine some specific characteristics for how Quantify deals with Shipments and Scaffolds. This tab has two sub-tabs: **Shipments** and **Scaffolds**.

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- [The Shipments Sub-Tab](#)
 - [Top Section](#)
 - [Color for Shipment Header Section](#)
 - [Shipment Permissions Section](#)
 - [Center Section](#)
 - [Custom Lists for Shipments and Scaffolds Section](#)
- [The Scaffolds Sub-Tab](#)
 - [Top Left Section](#)
 - [Built-in Scaffold List Names Section](#)
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- [Common Items](#)
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The Shipments Sub-Tab

The **Shipments** tab enables you to determine specific ways in which Quantify handles Shipments.

Top Section

Default shipment view filter	Use this dropdown to filter (by date range) which Shipments appear in the Shipping tab in the Quantify interface.
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Color for Shipment Header Section

Use the dropdowns in this section to configure the headers in the Shipping reports Quantify produces.

Delivery	Use the Delivery dropdown to determine the color used in the header of Shipping reports for deliveries,
Return	Use the Delivery dropdown to determine the color used in the header of Shipping reports for returns. (Pre-returns have the same color as returns.)
Transfer	Use the Delivery dropdown to determine the color used in the headers of Shipping reports for transfers.

Shipment Permissions Section

The **Shipment Permissions** section enables you to determine the permissions for the *New Direct Ship* and *New Reservation* dialogs.

Allow editing of shipment number	When this checkbox is checked, Quantify allows users to edit the shipment number in the <i>New Direct Ship</i> and <i>New Reservation</i> dialogs. Allow editing of shipment number affects both regular Shipments as well as Shipments to Scaffold Tag locations
Allow rent stop date to be modified	When this checkbox is checked, Quantify allows users to edit the date on the Rent Stop date field in the <i>New Direct Ship</i> and <i>New Reservation</i> dialogs.
Allow editing and prorating of rent rate	When this checkbox is checked, rent can be edited and prorated in the <i>Shipment Completed</i> dialog.
Allow editing of recurring charges	When this checkbox is checked, Quantify users can change the amounts in the Charge/Unit column in the Recurring Charges tab of the <i>New Direct Ship</i> dialog.
Allow editing of minimum days	This option works in conjunction with the First Advance, Then Arrears billing method. When this checkbox is checked, Quantify displays a new column (Min. Override) in the Product tab of the <i>New Direct Ship</i> dialog. Users can use this tab to override the minimum days rent that was configured in the Job Site dialog , when shipping items to affected Job Sites. Note: This only work with shipments made to the Job Site, not from it.

Allow editing of consumable sell price	When this checkbox is checked, Quantify allows users to edit the sell prices of Consumables in the <i>New Direct Ship</i> and <i>New Reservation</i> dialogs.
Allow editing of additional charge description	When this checkbox is checked, Quantify allows users to edit the descriptions of Recurring Charges in the <i>New Direct Ship</i> and <i>New Reservation</i> dialogs.
Allow editing of additional charge weight	When this checkbox is checked, Quantify allows users to edit the weights of Additional Charges in the <i>New Direct Ship</i> and <i>New Reservation</i> dialogs.

Center Section

The center section enables you to configure the default dates in the **Rent Start** and **Stop date** fields for new deliveries and returns

Default rent stop date on new returns to today plus	When this checkbox is checked, you can configure the default rent stop date for new returns,
Days	If you click the checkbox above, use this text field to define the number of days from the current day (today) on which you want rent to stop.
Default rent start date on new deliveries to today plus	When this checkbox is checked, you can configure the default rent start date for new deliveries,
Days	If you click the checkbox above, use this text field to define the number of days from the current day (today) on which you want rent to start.

Custom Lists for Shipments and Scaffolds Section

This section enables you to enable/disable and configure custom lists for Shipments and Scaffolds.

List	When this checkbox is checked, the corresponding custom list appears in the Shipment Properties tab of the <i>New Direct Ship</i> dialog and the Properties tab of the <i>Scaffold</i> dialog.
Text Field	Use these text field to add a label to the custom lists that have been enabled by clicking the checkbox(es) above.
Required	When this checkbox is checked, users must select an item from the list(s) in order to complete the Shipment or Scaffold.

The Scaffolds Sub-Tab

The **Scaffolds** tab enables you to determine specific ways in which Quantify handles Scaffolds.

Top Left Section

The checkboxes in the top left section enable you to define some fundamental Scaffold features.

Allow scaffold tracking	When this checkbox is checked, Scaffold tracking is enabled on a global basis. Users can then enable it on a Job Site-by-Job Site basis.
Allow scaffold to be set completed if there are balances	When this checkbox is checked, Scaffolds can be considered completed even through there are balances on an account.
Allow scaffold transfers	When this checkbox is checked, Scaffolds can be transferred between Job Sites.
Checkbox to create inspection from new activity is checked by default	When this checkbox is checked, the Create new inspection when clicking OK checkbox in the <i>Activity</i> dialog will be checked by default.
Label for tab in main window	Use this text field to change the name of the Scaffold Register tab in the Quantify interface.

Built-in Scaffold List Names Section

The text fields in this section enable you to define three custom lists that appear in the Quantify interface.

List	When this checkbox is checked, the corresponding custom list appears in the Shipment Properties tab of the <i>New Direct Ship</i> dialog and the Properties tab of the <i>Scaffold</i> dialog.
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Text Fields	Use these text fields to name the custom lists that have been enabled by clicking the checkbox(es) above.
Required	When this checkbox is checked, users must select an item from the list(s) in order to complete the Shipment or Scaffold.

Scaffold Statuses Section

The features in the **Scaffold Statuses** section enable you to edit the names of the statuses assigned to Scaffolds in the Quantify interface.

Edit	Select a Scaffold Status and click this button to edit that status.
Name	This column displays the name of each current Scaffold Status.
Active	This column displays whether each current Scaffold Status is active or not.
Description	This column displays the description of each current Scaffold Status.

Status Dialog

The *Status* dialog appears when you select a Scaffold Status and click the **Edit** button (). Use this dialog to customize the available Scaffold Statuses.

Active	When this checkbox is checked, the Status is active.
Name	Use this text field to add/change the name of the current Status.
Description	Use this text field to add/change the description of the current Status.

Common Items

Regardless of which tab you select above, the bottom of the **Shipments and Scaffolds** tab remains constant. It enables you to configure available custom lists and default rent start and stop dates.

Rent Stop/Start Dates

The **Rent Stop/Start Dates** section enables you to configure the default rent start and stop dates for new deliveries and returns.

Default rent stop date on new returns to today plus	When this checkbox is checked, you can configure the default rent stop date for new returns,
Days	If you click the checkbox above, use this text field to define the number of days from the current day (today) on which you want rent to stop.
Default rent start date on new deliveries to today plus	When this checkbox is checked, you can configure the default rent start date for new deliveries,
Days	If you click the checkbox above, use this text field to define the number of days from the current day (today) on which you want rent to start.

Custom Lists for Shipments and Scaffolds Section

This section enables you to enable/disable and configure custom lists for Shipments and Scaffolds.

List	When this checkbox is checked, the corresponding custom list appears in the Shipment Properties tab of the <i>New Direct Ship</i> dialog and the Properties tab of the <i>Scaffold</i> dialog.
Text Field	Use these text fields to name the custom lists that have been enabled by clicking the checkbox(es) above.
Required	When this checkbox is checked, users must select an item from the list(s) in order to complete the Shipment or Scaffold.

Custom Properties for Shipments and Scaffolds Section

This section enables you to enable/disable and configure custom properties for Shipments and Scaffolds.

Text	When this checkbox is checked, the corresponding custom property appears in the Shipment Properties tab of the <i>New Direct Ship</i> dialog and the Properties tab of the <i>Scaffold</i> dialog.
Yes/No	When one or more of these checkboxes are checked, Quantify enables users to create custom Yes/No question/answer checkboxes. A check in the checkbox means the answer is Yes. Use the text field beside the Yes/No checkbox to configure the appropriate label/question for the custom Yes/No checkboxes that appears in the <i>Scaffold</i> dialog.
Required	When this checkbox is checked, users must use the custom property in order to complete the Shipment or Scaffold.

Adding a Custom Field to the New Direct Ship Dialog

Manage custom fields for Job Sites, except lists, through the **Job Site Properties** tab of each Job Site.

To add a custom field to the *New Direct Ship* dialog:

1. Click the the **Tools** menu and select **Global Options**.

The screenshot shows the Avontus Quantify application window. The 'Tools' menu is open, and 'Global Options...' is highlighted. A red arrow points to this menu item with the text 'Click and select'. The background shows a table of inventory items with columns for Part Number, Serial Number, and various status columns (Available, On Rent, New, Reserved, In Transit).

Part Number	Serial Number	Available	On Rent	New	Reserved	In Transit
0007-117			38	173		
0010-02-07		54	164			
0010-02-10		547	14			
0010-04-07		39	12			
0010-04-10		170	5			
0010-04-10		-52	56			
0019-47-507	GOOSER (SQUARING) BRACE - 5W X 7L TOWER	76	22			
0019-47-510	GOOSER (SQUARING) BRACE - 5W X 10L TWR	-6	101			
0022-01-05	GUARDRAIL 5'	3				2
0022-01-05	GUARDRAIL 5'	672	68			15
0022-01-07	GUARDRAIL 7'	331	85			
0022-25-10	GUARDRAIL 10'	312	10			
0023-138	GUARDRAIL POST 1.69" X 45	257	66			
0026-772	CASTER, 8" RUBBER WHEEL W/2" /SNAP PIN	253	62			
0026-835	CASTER, 5" 250# W/ 2" SNAP PIN	49	45			
0032-086	SCREWJACK W/BASE PLATE - 1.69" FRAME	52	45			
0042-035	LEDGER PLATFORM REST 5' WIDE	489	20			
0042-093	GUARDRAIL, INSIDE STEP UNIT	445	45			13
0042-094	GUARDRAIL, OUTSIDE STEP UNIT	81	4			
0042-221	STEP UNIT - 24" WIDE FOR 5X6'4" FRAME	82	5			
0042-400	LADDER SUPPORT BRACKET (SAU STYLE)	91	5			

The *Global Options* dialog appears.

2. Click the **Shipments and Scaffold Tags** tab.

Global Options

General Requests Billing Reports Names and Labels Products Shipments and Scaffolds Job Site Options Quantify Web Notifications

Shipments Scaffolds

Default shipment view filter
Within Last Six Months

Color for shipment header

Delivery Return Transfer

Transparent Transparent Transparent

Shipment permissions

Allow editing of shipment number Allow editing of minimum days
 Allow rent stop date to be modified Allow editing consumable sell price
 Allow editing and prorating of rent rate Allow editing of additional charge description
 Allow editing of recurring charges Allow editing of additional charge weight

Default rent stop date on new returns to today plus 0 days
 Default rent start date on new deliveries to today plus 0 days

Custom lists for shipments and scaffolds

When used, the values for custom lists below are managed on the Custom Lists menu.

List 1 List 1 Required
 List 2 List 2 Required

Properties for shipments and scaffolds

Text 1 Custom Property 1 Required
 Text 2 Custom Property 2 Required
 Yes/No 1 Yes/No 1
 Yes/No 2 Yes/No 2

Changes to global options affect all users

OK

3. Click the **List 1** checkbox (to put a check in it).

4. Click in the **List 1** text field and enter a label for the list.

5. As necessary, click the **Required** checkbox, to require user to make a selection from the list.

Global Options

General Requests Billing Reports Names and Labels Products Shipments and Scaffolds Job Site Options Quantify Web Notifications

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Color for shipment header

Delivery Return Transfer
 Transparent Transparent Transparent

Shipment permissions

Allow editing of shipment number Allow editing of minimum days
 Allow rent stop date to be modified Allow editing consumable sell price
 Allow editing and prorating of rent rate Allow editing of additional charge description
 Allow editing of recurring charges Allow editing of additional charge weight

Default rent stop date on new returns to today plus 0 days
 Default rent start date on new deliveries to today plus 0 days

Custom lists for scaffolds

When shown, the values for the properties below are set on shipments and scaffolds

Text 1 Custom Property 1 Required
 Text 2 Custom Property 2 Required
 Yes/No 1 Yes/No 1
 Yes/No 2 Yes/No 2

Custom list 1: Freight Options Required
 Custom list 2: List 2 Required

Changes to global options affect all users

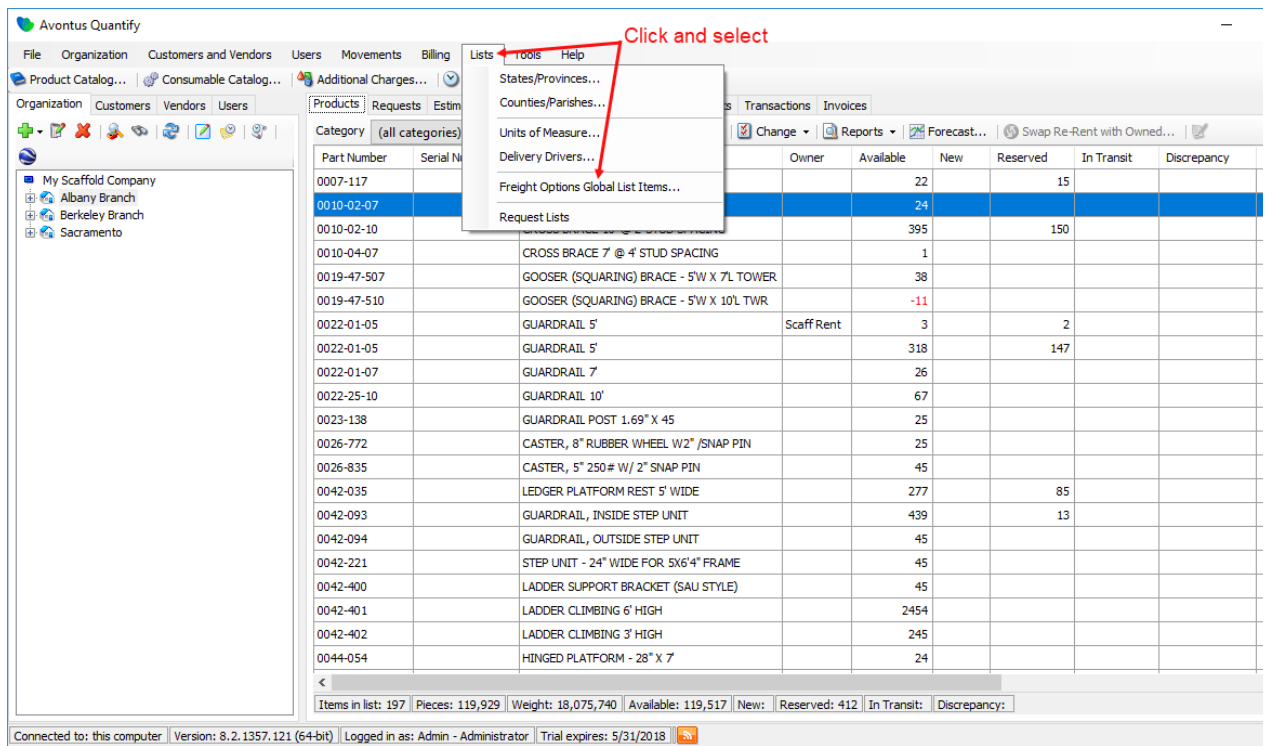
OK

6. As necessary, repeat the above three steps for **List 2**.


7. Click **OK**.

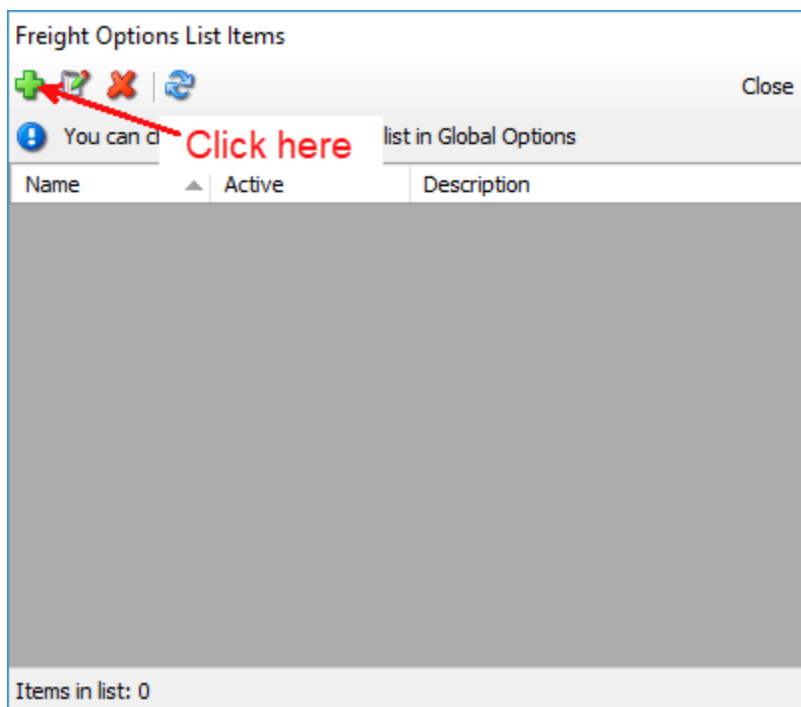
Next, use the **Lists** menu to add items to each list you are working on.

8. Click the **Lists** dropdown and select **Freight Company Global List Items**.



The *List Name List Items* dialog appears.

9. Click the **Add** button ().




The *List Item* dialog appears.

10. Click in the **Name** text field and enter a name for the new list item.

11. As necessary, click in the **Description** text field and enter a description of the new item.

List Item

Active

Name 

Description

12. Click **OK**.

The *List Name List Items* dialog returns.

13. Repeat the above four steps to enter all the list items.

14. If you are adding a second list, repeat the above steps in *the List Name List Items* dialog and the *List Item* dialog


15. Click **Close**.

The list(s) and items will appear in the **Shipment Properties** tab of the *New Direct Ship* dialog. Pivot reports will also display the custom fields.

New Direct Ship

Summary Products Additional Charges **Shipment Properties**


Shipment properties


 You can change the label for these items in Global Options on the Shipment and Scaffold Tag tab

Custom Property 1

Custom Property 2


Yes/No 1

Freight Options 

Trucking Options 

Yes/No 2




Destination job site properties

 Values and labels are set in the job site

List 1

List 2

List 3

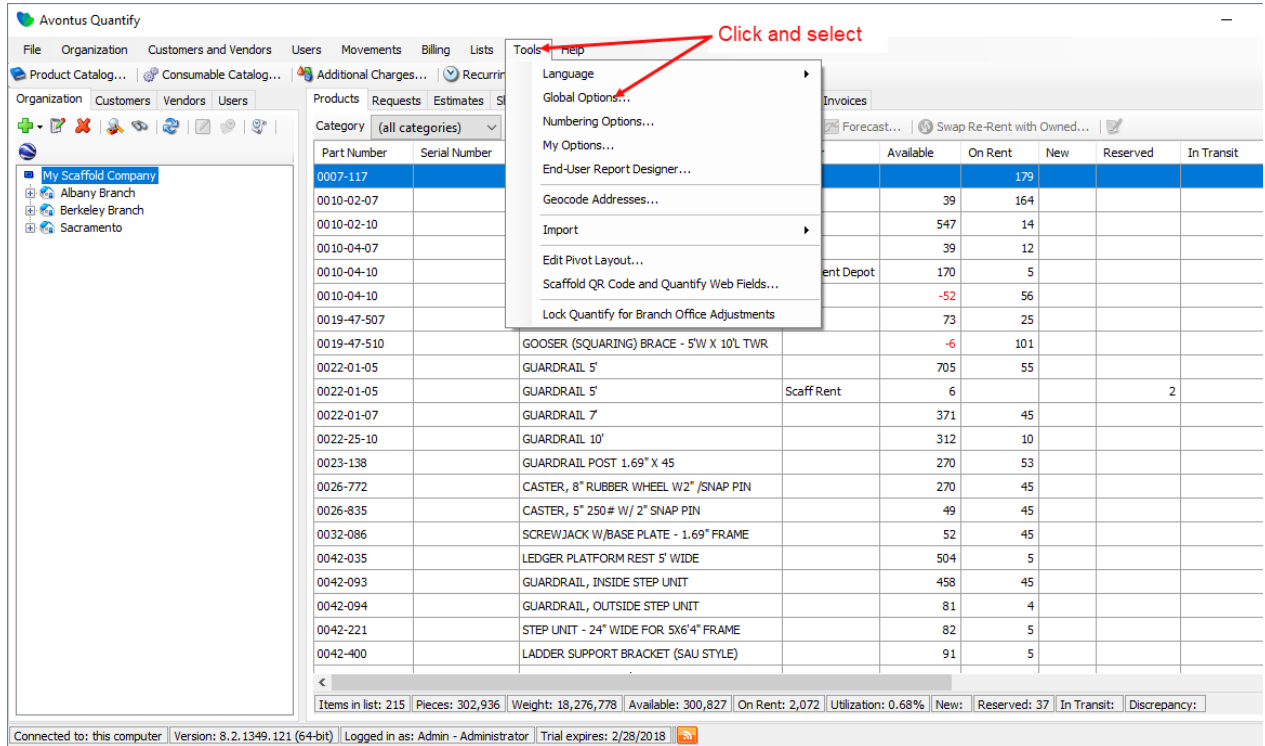
Print 0  copies of Shipment   Complete Shipment

Enabling Scaffold Tracking

Scaffold Tracking features are disabled by default.

To enable Scaffold Tracking features:

1. Click the **Tools** menu and select **Global Options**.



2. Click the **Shipments and Scaffolds** tab.
3. Click the **Scaffolds** sub-tab.
4. Click the **Allow scaffold tracking** checkbox, to put a check in it.

Global Options

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Shipments Scaffolds

Allow scaffold tracking
 Allow scaffolds to be set completed if there are balances
 Allow scaffold transfer
 Checkbox to create inspection from new activity is checked by default

Label for tab in main window
Scaffold Register

Scaffold statuses

	Name	Active	Description
1	Estimate	Yes	Planned or estimated. Used for forecas...
2	Custom 1	No	Custom value
3	Custom 2	No	Custom value
4	On Rent	Yes	Default value for new tags. Scaffold is ...
5	Custom 3	No	Custom value

Built-in scaffold list names

Priority Required

Project Required

Step Required

Default rent stop date on new returns to today plus 0 days
 Default rent start date on new deliveries to today plus 0 days

Custom lists for shipments and scaffolds

When used, the values for custom lists below are managed on the Custom Lists menu.

List 1 List 1 Required
 List 2 List 2 Required

Properties for shipments and scaffolds

When shown, the values for the properties below are set on shipments and scaffolds

Text 1 Custom Property 1 Required
 Text 2 Custom Property 2 Required
 Yes/No 1 Yes/No 1
 Yes/No 2 Yes/No 2

Changes to global options affect all users

OK

5. Select any other options as necessary.

Note: The tab that contains Scaffold information and features is named **Scaffold Register** by default. You can rename this tab by entering a custom name into the **Label for tab in main window** text field.

6. Click **OK** when ready