ODT Rentals 365

North America
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Open Door Technology
200, 7710 5 Street SE
Calgary, Alberta T2H 2L9
877.777.7764

www.opendoorerp.com

What's New

- **Enhanced Rental Inventory Availability**
  The Rental Inventory Availability feature has been enhanced to display the items linked to a rental unit availability on a per day basis in a matrix. The inventory availability calculation has been enhanced to include the rental reservation entries starting and ending dates. When the quantity for a day is clicked on, then a page opens which displays quantities as of the date the quantity was clicked on. The columns include Quantity on Hand, the Qty. on Rent/Reserved, Expected Qty. to Return and a Projected Available Balance.

- **Reconcile Quantity Feature**
  The Reconcile Quantity feature provides a Shortage List report, to assist users in determining which contracts and contract lines have a shortage and need to be reviewed, and the shortages addressed before shipment of the units can be completed. The report contains the Rental Contract No., Customer Name, Rental Unit No., Rental Start and End Date, quantity required, available quantity and indicates there is a shortage. Rental Shortages cues displaying the number of contract and contract lines are available to be displayed on the Business Manager and Sales Order Processor role centers by enabling the field, "Shortage Cues Visible" on Rental Management Setup. A field called, Shortage, is available to add to the Rentals Lines using Personalize, which when checked indicates that a shortage exists for the unit or linked item selected on the rental line.

- **Resolve Rental Shortages**
  The Resolve Rental Shortages provides the ability to resolve the shortages, from the Rental Contract. The feature including the ability to transfer rental product from one rental location to another rental location or create a purchase order to purchase items or sub-rent product. When a unit is linked to an item or fixed asset, then when a transfer is used to resolve the shortage the item or fixed asset is transferred to the selected rental location as well.

- **Rentals to Jobs Integration**
  The Rentals to Jobs integration provides the capability to create a Job and budget Job Planning Lines from a Rental Quote using a Template Job, create a Rental Contract from a Job, and when invoicing a contract create billable Job planning Lines for both the rental and sales lines invoices on a contract. On the Jobs page a Job History fact box has been added, which contains cues displaying the number of completed rental contract, ongoing (open) rental contracts and ongoing rental contract lines which are linked to the Job Planning Lines on the Job.

- **Creation of a Rental Quote or Rental Contract from a Contact**
  The ability to create a Rental Quote or Rental Contract from a Contact card. When the Contact is not linked to a Customer, then only a Rental Quote can be created. If the Contact is linked to a Customer, then either a Rental Quote or Rental Contract can be created from the Contact.

- **Rental Units linked to Items has been enhanced to include Items with Lot Tracking**
  The Item Tracking Code card, Lot No. tab has been modified to include a field called Lot Rental Tracking. Rentals also includes the capability for Expiration Dates and Strict Expiration Posting. The Item Tracking Entries on the Rental Quote and Rental Contract provide the ability to select Lot entries.

- **The selecting of Rental Units on the Rentals Lines has been enhanced to provide ability to select multiple Rental Units, groups, or rental packages from the Rental Unit No. field list to populate the rental lines of a Rental Quote or Contract.**

- **Modification of the Rental Accruals and Deferrals**
  The rental accruals and deferrals feature has been modified to include the reversal lines on the same journal that the accrual and/or deferrals are calculated.

- **Customer Sales History and Sell-to Customer Sales History Fact boxes have been enhanced**
  Rental related cues added to the Customer Sales History include Bill-To Ongoing Rental Contracts, Bill-To Ongoing Rental Quotes, Bill-To Completed Rentals Contracts, Bill-To Completed Rental Quotes and Bill-To Ongoing Rental Contract lines.

- **The Item Tracking Lines for returned units linked to items with Serial No. tracking have been enhanced to display the Serial Nos. of the items used during the rental.**

- **The Periodic Usage, Standby Charges and Metered Usage pricing and processing has been enhanced to provide the ability to override the respective tax group codes on the lines. Or if using line pricing for Periodic Usage & Standby Charges, specify the applicable tax group codes to be used for invoicing.**
  When upgrading to this release, if rental price cards exist for the Rental Term on the rental lines for Metered Usage, Periodic Usage, and if applicable, Standby Charge pricing, then the applicable tax group code fields on the lines will be updated from the respective price cards. If rental price cards for Periodic Usage & Standby Charges do not exist, then their respective tax group code fields will be populated with the Tax Group Code on the Rental Line.

- **Rental Quotes and Rental Contracts have been enhanced to display the Responsibility Center on the General tab.**

Issues Resolved

- Print Proforma Invoice is not validating the Billing Tolerance Days resulting in printing a Proforma Invoice when should not be.

- If ship a rental unit, run undo ship, delete the rental line and then add a new unit the Rental Ledger Entries from initial unit are displayed.

- The Advanced Pro-Forma, Create Pro Forma when contract has Rental Packages is not generating the Package Rounding Amount line in the Lines tab of the invoice.

- Rental Package components Unit Prices do not recalculate when 1 or more component rental lines are deleted.

- Rental Ledger Entries are created, that should not be, on the Rental Package Rental Line when a rental swap is processed for a component and when an early return of a component is processed.

- When using Rental Packages and return a component rental unit in a different Time Zone multiple new package component lines are created.

- A filtering error is occurring on Auto Credit Memo on rental units returned during the Swap Rental functionality.

- When returning a rental unit in a different Time Zone the Time Difference and Date-Time fields have the incorrect time.

- Bulk Returns when ran on a contract with Rental Packages on the rental lines select to update the return date and specify a return date different than on the lines, then on the component lines, the Rental Billing End Date and Rental Billing End Date-Time fields do not have the date updated.

- On the Rental Invoicing Worksheet, Print Proforma the No. field filter does not print the Proformas according to the filter, when printing multiple proforma invoices.

- On a Rental Rapid Return document when use the right and left arrows to move to the next or previous Rental Rapid Return document a confirmation message occurs: Do you want to rename the record? If No is selected, the user is not moved to the next or previous document. If Yes is selected, then an error occurs.

- When the Rental Unit No. is cleared on a rental group child line that has the Serial No. field populated, the Serial No. field is not cleared. This occurs when manually clear the Rental Unit No. field or when the field is cleared when copying an open rental contract where the child lines have been shipped.

- The Rental Invoicing Worksheet Suggest Contract is generating records for contract that have an Advanced Proforma Invoice which has not been posted which results in not being able to post invoices from the Rental Invoicing Worksheet.

- When creating a Rental Quote using a Contact and enter a Sale Line, a field length error occurs related to the Sell-to Customer Template Code field.

- An error occurs when transferring a contract that the Ship-to field on contract is set to, Alternative Shipping Address.

- Inventory Transfer to FA and Rental Unit returns an error when creating the Fixed Asset.

- After creating a contract with a blank return date, if a No. of Periods or Return Date is entered, then delete the return date the error, The Date is not valid, occurs.

- The Rental Ledger Entries quantity fields are incorrect when ship rentals, run Undo Shipment, re-ship the unit and then process a partial return.

- When Append Job Planning Lines to a contract using Create New Rental Contract and then enter Rental lines & additional Sales Line, when Run Create Proforma only the Appended Lines are included in the Advanced Proforma Invoice. The new rental and sales lines added are not included on the Advanced Proforma Invoice.

Known Issues

- When using Auto Credit Memo and the rental term on the line is a Start or Periodic Start daily term with Summarize Lines enabled, then a filtering error occurs when an early return is processed.

- When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.

- When printing the Rental Contract, the Contract Total on the General tab on the contract may differ from the report total by pennies due to the tax rounding calculation when run the contract report.

- When on the Unit Avail. Matrix the user has set an Attribute with Value filter and closed the Filter Rentals by Attribute page and the lines have been filtered, and then go back into the Filter Rentals by Attribute page and clear the Value field and close page. The Attribute Filter is blank, but lines are not updated as the lines are still filtered by the attribute and attribute value. When go back into the Filter Rentals by Attribute page there are no records displayed. To get the lines to display without the filters, the user must add back the Attribute and Value in the Filter Rentals by Attribute page, select ok and then delete the data in the Attribute Filter field in the matrix options.

- On the Rental Contract, if all the rental lines are deleted, then on the General tab the Contract Total and Amount Outstanding fields are not cleared.

UPCOMING Releases – Planned Modifications and New Features

- **Deposits**

- **Thumbnail view of Rental Units**

- **Enhancement to the Billing Cycle Types of End of Month Billing and First of Month Billing when using the Blank Return Date feature.**

- **Rental Dispatch**

- **Electronic Signatures**

- **Undo Returns**

- **Change Log View for Rental Contracts**

- **Commission Calculations**

- **Add Shipping feature on rental contract lines & To Ship list page, including:**
  - Pick-up Location & address with options to select internal location, vendor location or manually enter the address to picked up the unit.
  - Ship-to Location & address for customer location or manually entering address.

- **Add Return feature on rental contract lines & To Return list page, including:**
  - Pick-up Location & address with options to select customer location or manually enter the address to picked up the unit to be returned.
  - Return-to Location & address with options to select internal location, vendor location or manually enter the address to return the unit to.

- **Multiple meters for Rental Units**

- **Putting a Rental on Hold**

- **Recurring Sub-Rental PO feature**

- **Enhancement of the Group Availability Matrix to have Category and Attribute filters in the Options**

- **Metered Usage enhancement for Optimization and/or Proration of Metered Usage Allowance Limits**