

ODT Rentals 365

North America

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Revision 1

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What's New

- **Rental Inventory Availability Details Enhanced**
  On the Rental Inventory Availability details page, the column caption of Qty. on Hand has been changed to Total Rental Quantity for clarity what the quantity in the column includes. A drill down on the Qty. On Rent/Reserved and Expected Qty. to Return fields has been added, which when selected display the rental lines making up the quantity displayed in the columns.

- **Roll-up Pricing Option for Rental Packages**
  This feature provides the ability to specify on the Rental Package card that the pricing on the package is to be the sum of the components pricing as rather than a price setup on the rental package. Rental price cards for rental terms are not setups on the package card.
  Included is the ability to setup a Rental Package with Use Roll-up Pricing as a template package with Rental Units specified that are usually rented out together which may not necessarily be delivered or returned at the same time. The template package lines can include only a comment line, providing the ability to insert the required components on the rental lines of a quote or contract building the package on the fly.
  Components in the package on the rental lines can have a different shipment/dispatch date, rental start date and rental return date that fall within the same dates specified on the rental package line. On the Rental Lines the Rental Term and Rental Billing Start Date will be set to the rental package line date and cannot be modified on the component lines.
  The billing is based on the details (Rental Amount Lines, Billing Date) of the component lines on the contract.
  The feature also includes the ability on the rental lines to switch a rental package from the package pricing allocation to the roll-up pricing.
  The rental documents, quote, contract, Proforma, Advanced Proforma and Posted Rental Invoice for Roll-up Packages print a Total Price of the sum of the components. When Show Rental Details is enabled the detailed pricing of the components included in the invoice will print.

- **Undo Rental Returns**
  Provides the ability to undo a rental return on an open rental contract when the unit is available to rent out.
  When a unit is linked to an item there must be available quantity in the location returned to, and if applicable the bin when stored in bins. When linked to an item with Serial No. Tracking the item with the Serial No. that was return must be available to rent. When linked to an item with Lot Tracking there must be the quantity returned available in the Lot that was returned.
  The Undo Return cannot be ran for units returned using the Rental Swap, Rental Exchange, and Transfer Contract features.

- **Rental Swapping/Exchange Enhancement**
  A feature, Rental Exchange, has been added to the rental contract enabling users to exchange multiple rental units from the Rental Menu on the contract. This feature

provides the ability to specify whether the return on the selected unit is to be processed or not.
The feature also provides the ability to return the selected unit to a different or temporary location and the new/replacement unit can be shipped from a different location than the initial unit.

- **Shortage List report and Resolve Shortages Enhancements**
  The Shortage List report has been enhanced to include a column displaying the Qty. Short, Sched. Rcpt Qty. and Purch. Order No. When a Purchase Order was created when resolving the shortages and the item has not been received, this data will print on the report.
  The Rental Shortage List page for resolving shortages has been enhanced to include both the Rental Quantity and the Shortage Quantity.
  When a Purchase Order has been created and the items not received, then the lines will continue to be displayed until the items are received. Additional fields have been added to the lines, Purchase Order No. and Purch. Order Line No. for visibility of when a Purchase Order has been created, but the items have not been received. The Purchase Order can be opened using the Related, Purchase Order menu option.

- **Pictures added to Thumbnail Views on Rental Unit List**
  When pictures have been imported on the rental unit cards the pictures will be displayed on the Rental Unit list page when Tall Tiles or Tiles is selected.

- **Electronic Signatures Library App has been added to ODT Rentals**
  The electronic signatures can be configured to allow for a maximum of 8 signatures to be captured on the rental documents including the rental quote, rental contract, posted rental delivery, posted rental return, advanced proforma invoice, and posted rental invoice.
  When using the Advanced Proforma feature an option is provided on Rental Management Setup to specify whether the Advanced Proforma signatures are to flow through to the Posted Invoice.
  The signatures captured on each document will print the applicable document reports.
  The signatures captured on the rental contract will print on the proforma invoice.

- **Job Menu Option added to the Completed Rental Quote and Completed Rental Contract**

- **The rounding precision has been modified for the prorated rental terms to compensate for a change made by Microsoft related to rounding precision.**

Issues Resolved

- 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 transferring rentals where a Job No. is on the source rental contract if Copy Header is enabled on the Transfer Worksheet and the Bill-to Customer is changed the error that occurs is not cleared when the Copy Header field is disabled.

- On the Rental Inventory Availability matrix when the Previous Set is selected, or a date set which pre-dates the date the item was purchased, then the Qty. on Hand displays an incorrect quantity. NOTE: This column has been renamed to Total Rental Quantity.
- When resolving shortages for a rental unit linked to a Fixed Asset with an Action of Transfer an error occurred. When resolving a shortage on a unit linked to an item which had Item Tracking, Serial No. and/or Lot No. with an Action of Purchase an error occurred as the process was requiring the completed of the Item Tracking Lines, when should not have had this requirement.
- The Accrual Journal when accruing Periodic Usage is not generating accrual records when any periodic usage or standby charges had been invoiced during the month the accrual was calculated for.
- On the Job Card, Job Rental Contacts fact box Rental Quotes are also being displayed.
- On the Job card, when a Job Planning Lines contain a line created from invoicing a Rental Contract and select the Related -> Job Planning Line -> Rental Document menu option an incorrect rental document is displayed.
- When changing the Rental Term on the General tab of a rental quote or contact after the rental lines are entered, then if the rental lines contain a group, the Rental Return Date is being cleared on the child unit rental lines. And any lines with Standard Text Code have the Rental Term field populated when should not be.
- When a Rental Price card has Damage Waiver pricing with a Tax Group Code of Non-Taxable, then the Tax section is including the Damage Waiver amount in the Amount Subject to Sales Tax instead of printing the amount in the Amount Exempt from Sales on the Rental Quote, Contract and Proforma Invoice reports.
- When Auto Credit Memo is enabled, if when returning a rental unit early after invoicing, if the Rental End Billing Date is changed on the rental line, then a Sales Credit Memo is not created.
- An error occurs when entering a Rental Unit linked to an Item if a G/L Account related to the inventory transaction specified on the General Posting Setup has Dimension Code Mandatory.
- When a Rental Unit has a price card with a different Tax Group Code than is on the Rental Unit card, when the unit is entered on the rental line for the term on the price card, then the Tax Group Code is defaulting to the rental line from the unit card when should defaults from the price card.
- Reservation Entry dates are not updated when the Rental Start Date and/or Rental Return Date are changed on the rental lines.
- On Rental Contract with a Rental Package, in the Qty. to Return child lines of a rental group a quantity can be entered that is greater than the Qty. on Rent and the return posts using the incorrect Qty. to Return.

Known Issues

- Roll-up Packages with a blank Rental Return Date are returning an error disallowing the entering of a Rental Return Date on a component rental line.
- Rental Exchange when a unit being exchanged is being returned is triggering a confirmation message for whether all package lines are to be updated or not, when should not be.
- Undo Return errors and when ran on a component line within a standard rental package
- 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

- Change Log Views for Rentals
- Provision of an option on Rental Management Setup to set the Qty to Rent on the rental lines to 0 by default
- Enhancement to provide the ability to specify an initial Rental Term, subsequent processing Rental Term and Final Rental Term
- Recurring Sub-Rental PO feature
- Enhancement of the Group Availability Matrix to have Category and Attribute filters in the Options
- Swap from another group
- Email document attachment(s)
- Add Map function for location of rented unit on the Ship-To Address from the availability matrixes.
- Additional Reports
    - Utilization enhancements for shipped but not invoiced

  - Industries
  - Daily Invoicing Reports
  - Batch Invoicing validations

- Enhance the Blank Rental Return Date (indefinite) feature for End of Month and First of Month Billing terms to calculate out partial periods (if applicable) plus one full period.
- Enhancements/Modifications for Rental Inventory Availability
- Enhance the ODT Rental Integration, Linking Contracts to Job Planning Lines to include an option to create summarized Budget Lines from Rental Quotes. Budget Job Planning Lines to have one line for Rental revenue and another for Damage Waiver revenue.
- Add the ongoing and completed Rental Quotes to the Job history cues to make it easy for users to access them.
- Add a Rental Quote revisions archiving feature with the ability to restore (similar to the sales quote archiving).
- Quick Rental function from Availability Matrix(s) providing the ability to add a group or unit to an existing Quote or Contract.
- Loss and Damage feature with automatic allocation of return quantities with ability to specify a quantity to not restock back into inventory and a quantity to charge to the customer. Inclusion of a quick sale function to charge the customer.
- Resolve Shortages Phase 2