# ODT Rentals

## North America
### Release Notes V9.0.0.0

# What's New

- **User Defined Billing Terms**
  The User Defined Billing Term provides organizations to setup billing schedules to meet their billing requirements. Billing schedules provide the ability to specify an initial billing term, subsequent processing terms, a billing method, the rental term to be used and specify whether pricing is to be used from rental price cards. Billing Methods define when and how the billing is to occur.
  The User Defined Billing term can be setup as the Default Rental Term on a Customer, a Rental Group or Rental Unit. When the term defaults to or is entered on the header of a quote or contract in the Rental Term field, then the User Defined Billing Term, Billing Schedule lines can be viewed, but not edited from the Contract menu option.
  When a User Defined Term is selected on a rental line for a group or unit, then from the Line menu option, the Billing Schedule lines can be viewed and edited. When the pricing on price cards is not to be used, then the Rental Rates are to be entered on the Billing Schedule lines. The Rental Amount lines will be generated based on the Billing Schedule lines. There are editing restrictions on the Billing Schedule lines, which will be covered in the user help.

- **Visual Rental Availability Calendars**
  This feature provides calendar representations of the rental availability. On Rental Management Setup a default calendar period which sets the calendars view to display the sets based on the number of days in the selected rental period.
  The Rental Avail. Calendar can be accessed via the Business Manager and Sales Order Processor role centers menu or via search. This calendar by default displays the availability of Rental Groups and their assigned rental units, including the available, reserved and on rent quantities. Filtering options are available including an Availability Option, which controls what will be displayed in the calendar. Filtering fields which provide the ability to filter by Location, Category, Attributes and Group. A Start Date field, which is set to the users Work Date by default and can be modified to specify the starting date that the calendar days will commence on for the first set.
  From the Rental Line Group Availability Matrix, a Rental Group Availability Calendar and Rental Unit Availability Calendar are available. When a group is entered on the rental line without child units selected, the Group will show bars with Reserved equal to the Rental Quantity on the group rental line. These bars can be dragged down to the desired unit which will populate the rental lines when the calendar and the matrix are closed. The Availability Calendar can be accessed from the Rental Lines, Manage menu. Rental Units can be selected to populate the Rental Lines. When a unit assigned to a group is selected, the Rental Lines will be populated with the group and the selected unit.

- **Change Log Views**
  A menu option, View Change Log Entries, has been added to the following, which will display the change log entries based on the setting on Change Log Setup. The menu option is only visible when the related table is configured for tracking on Change Log Setup and the Change Log has been activated.
  Rental Management Setup card, Rental Price and Rental Attributes list and Rental Package Lines. Both the card and list on Rental Units, Rental Terms, Rental Categories, Customers,

Jobs, Items, Fixed Assets and Locations. The menu option is also available on the Rental Quote and Contract header and rental line menus.

- **Default Qty. to Rent Option**
  On Rental Management Setup the field, Default Qty. to Rent has been added which provides the ability to choose Remainder or Blank. When Blank is selected the Qty. to Rent on the Rental Lines and Qty. to Ship on the Sales Lines will be set to 0. Users must populate the Qty. to Rent on the rental lines to ship rental units. The Qty. to Ship on the Sales Lines must be populated prior to invoicing the lines when shipping and invoicing of the lines is to occur. The setting of Remainder is set by default and the population of the Qty. to Rent and Qty. to Ship are populated as per standard rental and sales lines process.

- **Blank Return Date Enhancements**
  The generation of Rental Amount lines has been enhanced for the Rental Terms with Enforce End of Month Billing or Enforce First of Month Billing so that when the first period to be invoiced is a partial period, the Rental Amount lines will contain the record for the partial period plus a record for the next rental period.
  The Blank Return Date feature has been enhanced to include the Billing Cycle feature with updating the Billing Cycle Date on the contract, Invoice Details tab to the calculated end date of the following period when an invoice is posted.

- **Electronic Signatures Enhancements**
  The electronic signatures have been enhanced to include the ability to view all Signature History from the Signature Setup. In addition, from the rental quote, rental contract, posted rental delivery, posted rental return, advanced proforma invoice, and posted rental invoice the related Signature History can be viewed.

- **Job Integration creation of Budget Lines from a Rental Quote Enhancement**
  The creation of the Budget Job Planning Lines from the rental quote has been enhanced to create a single planning line per rental line.

- **Rental Swap and Rental Exchange Modifications**
  The Replaced By field has been made available to add to the Completed Rental Contract, Rental Lines using Personalize.
  Removal of the confirmation message, "There are invoiced rental amounts later than 02/08/22. Are you sure you want to set the return date to 02/08/22?" which was occurring when entering the rental return date of a rental unit which was not initial returned during the exchange.

- **ODT Rentals has been enhanced to incorporate the Microsoft Business Central enhancement of Location Dimensions.**

- **The Rental Unit No. lookup list from the rental lines has been enhanced to enable the ability to add the Serial No. field to the list using Personalize.**

## Issues Resolved

- When from a Posted Rental Return document, the menu option, Send, is selected, then all Posted Rental Returns are sent when Yes, Default Settings is selected. When Yes, Prompt for Settings is used the selected Posted Rental Return document is sent, then the Email Editor page is automatically updated with the following Posted Rental Return document instead of closing.

- When running Set Usage with either Periodic Usage or Standby selected after days have already been set as Periodic Usage and Standby Charge, the Usage Type is getting set to No Usage.

- When a Rental Unit linked to a Fixed Asset with Allow Overbooking not enabled the Rental Quantity can be set to a quantity greater than one on the Rental Line.

- When a rental line has a Rental Unit with rental price cards for the term including one with no start and end date and one with start and end dates that are not within the Rental Start Date and Rental Return Date and the Rental Return Date is cleared on the line, the Rental Unit Price is being set to the price on the price card with the Start Date and End Date when should not be.

- Undo Return cannot be ran on the component lines of a Price Allocation Rental Package.

- 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.

- When using Prorated Rental Terms and create contract in one time zone where a Rental Amount Line has a prorated Extended Quantity and open in a different time zone the Extended Quantity in the Rental Amount Line is not the same.

- Rental Exchange cannot be used on Rental Units with Metered Usage or Periodic Usage pricing. Metered Usage Rental Amount Lines not invoiced are not being displayed on the replacement unit Rental Amount Lines and thus cannot be invoiced. Periodic Usage Entries on replacement units are not displayed correctly.

- When Create Job or Make Contract are ran on a Rental Quote with a Job Template on the header and a Rental Package on the Lines the Job is created, but the Budget Job Planning Lines are not created.

- Renaming a Rental Unit with Attributes does not rename the Rental Attribute Value mapping records.

- Proforma Invoice for contract with Roll-up Package does not print the details correctly.

- The Rental Shortage List displays incorrect Avail. Qty. and Qty. Short on the Group lines when no child units have not been selected and one or more of the units assigned to the group have the Inactive field enabled.

- On Rental Invoicing Worksheet if select all records and run Post Invoices, the process does not run, and no invoices are posted.

- If the Global 2 Dimension Code & Value are on the Rental Line dimensions, but are not on the Contract header dimensions, then when invoice the contract, the sales invoice is created and then an error occurs advising the rental line is missing the dimension.

- When a Rental Unit is linked to a Fixed Asset that has a Description with greater than 50 characters and return the unit to a different Rental Location than shipped from a string error occurs.

- When a 6 Month Rental Term on the Rental Line has a Rental Period with a Period Length formula of 1D+6M-1D, the entry of No. of Periods on the line does not calculate the correct Rental Return Date.

- When using Billing Cycle Date with a Rental Term that has a Rental Period with a Period Length formula such as 1D+6M-1D or 1D+2Q-1D and process an Rental Exchange where the initial unit is not returned and then to post an invoice an error, "Date is not valid", occurs when try to open Rental Amount Lines or add to the rental lines a standard text code or add text to the description field on a new rental line.

- When create a Renal Quote or Rental Contract and enter a Rental Term with Enforce End of Month or Enforce First of Month and then open the document in a different time zone and attempt to open the Rental Amount Lines an error occurs.

- The Contract Total field on the Rental Contract header does not update when only a single unit or group is entered on the first Rental Line.

- 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.

## Known Issues

- When Default Qty. to Rent on Rental Management Setup is set to "Blank" and a Template Job No. is entered on the General tab, and Rental Lines are entered without entering a Task No., then Create Job is ran the error message "Job No. and Job Task No. must be populated for all billable rental and sales lines if a job template is selected." does not occur and the Job is created when it should not be.

- When selecting a unit not assigned to a group on the Rental Line – Manage, Availability Calendar to populate the Rental Line, the Rental Return Date is not set to the correct date.

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

- 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

- Quick Rental function from the Availability Matrix's providing the ability to create or add to a Rental Quote or Rental Contract

- Swap or Exchange a Rental Unit from a different Rental Group

- Recurring Sub-Rental PO feature

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

- 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

- 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 the archived version (similar to the sales quote archiving).

- 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