ODT Rentals

Global
Release Notes V9.2.1.0

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What's New

- **Added a Rental Quote Archive**
  Rental Quotes can be added to the archive where they can viewed and restored at a later time.

- **Added the ability to create Recurring Sub Rental Purchase Orders**
  Purchase Orders that are recurring will remain open after invoicing to allow for continuous billing.

- **Added the ability to Exchange units from different groups**
  Rental Unit Cards can now have a list of units that may be used as substitutions. When exchanging a Rental Unit the user can view a list of substitutions for the selected rental unit and select one to use for the exchange.

- **Enhancements to the Location Mandatory feature to allow rental units to have no Location Code**
  Rental Units that are not assigned to a group and have Allow Overbooking enabled will not be required to have a Location Code on the Rental Unit Card. Location Code will default from the selected Customer on the Rental Contract, or it can be selected on the Rental Lines manually.

- **The Suggest Contracts function in the Rental Invoicing Worksheet now has an option to Skip Sales Lines**
  Allows users to skip charging sales lines in the Rental Invoicing Worksheet until they are ready to invoice.

- **Enhancements to Group Availability Matrix**
  Added Category and Attribute filters.

- **Enhancement to Reservation Entries**
  Starting Date-Time will now be updated when the rental unit is shipped.

- **Enhancements to Pick Lists**
  Have added options to print Lot Nos. and Sales Lines when printing a Pick List.

- **Enhancements to Fixed Fee Terms**
  When using Damage Waivers with Fixed Fee terms, the Damage Waiver Period Code must be the same as the Period Code on the Fixed Fee term card. Fixed Fee terms can now be used on rental lines without a price card on the Rental Unit.

- **Added cues for Ongoing and Completed Rental Quotes to the Job History Cues**

Issues Resolved

- Fixed an issue with Rental Invoicing Worksheet where multiple users posting at the same time would cause an error with Rental Value Entries.

- Fixed a string length error that would occur when navigating Rental Value Entries

- Creating a Job from a Rental Quote when Default Quantity to Rent on Rental Management Setup was set to "Blank" and the Task No. had not been entered on the Rental Lines was not causing an error message when it should.

- The Accrual Journal Test Report did not print Subtotal and Report Total when amount was set to 0.00

- When switching a Rental Package from Price Allocation to Roll-Up, Restrictions for Package Locked, Price Locked, and Do Not Print were being applied when they should not.

- When a Roll-Up Package Line has a Line Discount and a unit or group is inserted into the package, the Line Discount does not populate the component lines

- When switching from a Roll-Up Package to a Price Allocation Package, if the Rental Start Date and Rental Billing End Date is modified on the Roll-up components, they are not being reset to the Package Line Dates.

- Cannot print Pick List report from Shipments Due Today

- When using Inventory Transfer to Rental, the Allow Rental Transfer had validation that would require a Tracking Code when it should not

- When transferring a serialized item with a Transfer From Location and enter a different location in the Transfer To Location, when the Item Tracking Lines open the Transfer To Location is populated in the Location field when should be the Transfer From Location.

- When viewing the line for User Defined Billing Terms, when selecting all lines and then select Delete Line an error would occur when it should not

- If the line for a User Defined Billing Term had an initial billing record with a Fixed Fee term, followed by Duration Based or Fixed Billing records with either PS-DAY or PE-DAY, then Rental Amount Lines would not be correct.

- If the lines for a User Defined Billing Schedule have an Initial Billing record of Fixed Fee, followed by one or more records with Use Pricing From Setup enabled and terms with Damage Waivers, then Damage Waiver records are not generated correctly

- When using the Rental Invoicing Worksheet with multiple records, if select all and run Post Invoices nothing happened.

- Running Suggest Contract in the Rental Invoicing Worksheet does not generate records for Rental Lines and Rental Amount Lines with Fixed Fee rental terms

- 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.

Known Issues

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

- Visual Calendar Setup colors do not work correctly when using translations.

UPCOMING Releases – Planned Modifications and New Features

- Dispatch Functionality

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

- Email document attachment(s)

- Add Map function for location of rented unit on the Ship-To Address from the availability matrixes.

- Enhance Transfer Contract to include Recurring Sub Rental PO

- Additional Reports

    o Utilization enhancements for shipped but not invoiced

    o Industries

    o Daily Invoicing Reports

    o Batch Invoicing validations

- 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