



# ODT Rentals

Global (Rest of World)  
Release Notes V10.0.1.2

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

[www.opendoorerp.com](http://www.opendoorerp.com)

## What's New

- **Fixed Asset Transfer to Inventory**

The Fixed Asset Transfer to Inventory provides the capability to automatically transfer the asset to a resale inventory Item with Item Tracking for Serial No. A FA G/L journal and an Item Journal are automatically created and posted, thus generating the appropriate entries. The Fixed Asset card and Rental Unit card if linked, will have the Inactive field automatically enabled.

- **Quick Rental from Group Availability Matrix**

From the main Group Availability Matrix, the new menu option of "Quick Rental" is located under the Process menu, which provides the ability to either add to an existing contract or create a new contract for the selected rental group. The quantity required, Rental Start and Rental End Date, Rental Terms Code and Location can be specified on the request page.

- **Rental Approval Workflows**

The Rental Approval Workflows allows for the use of approval workflows during rental processes, where a user must request approval before performing certain processes and must receive approval from one or more approvers before they are allowed to continue.

The Rentals Approval Workflow currently only applies to Rental Quotes and Rental Contracts. Approval is required before performing any of the following processes:

- Printing a Rental Quote or Contract
- Sending a Rental Quote or Contract
- Print and Send a Rental Quote or Contract
- Running Create Contract
- Shipping a Rental Contract

- **Additional Fee Pricing**

The Additional Fee pricing provide the same pricing configuration options a Damage Waiver pricing, plus provides a global option on the Documents tab on Rental Management Setup to specify a name to be used for the fee. When specified, the name is displayed on the price cards, Rental Amount Lines, and the rental documents.

A new tab has been added to the Rental Unit Price card where the Additional Fee can be configured as a unit price, a percentage of the rental period charge, or a percentage of the sum of the rental charge plus usages charges each rental period.

- **Rental Dispatch**

The Rental Dispatch feature provide organizations the ability to configure, plan, coordinate and process rental and sales deliveries and pickups for rental contracts.

A Planning Worksheet is used for creating and coordinating delivery and pick-up loads into trips. The planning lines are automatically populated when Rental Contracts are released for delivery or pickup, or the Dispatch Status on rental and sales lines is manually set to Delivery or Pickup.

Global setups can be configured as to whether weights and measures are to be metric or imperial measures, standard business hours and days. Weights and measures configuration is available on Rental Unit, Fixed Asset, Item and Resource cards.

Create user defined Transport Types, Vehicles, Drivers, Assistants, and additional equipment needed for deliveries and pickups, which can be specified on the rental documents, Planning Worksheet and/or the Delivery and Pickup Loads.

Dispatch Cues are provided for quick and easy access to the Planning Worksheet and open, released, confirmed, and completed Delivery and Pickup Loads.

- **Enhanced Recurring Sub Rental Purchase Orders**

The recurring Sub Rental Purchase Orders has been enhanced to include the transferring of rental lines from Rental Contract, updating the Purchase Order lines to display the new contract.

- **Metered Usage Enhanced to Include Optimization and Proration of Allowances**

The Allowance accumulation has been enhanced to account for partial period allowances.

When the Rental Term is an Optimized term, the allowances are accumulated based on the unit pricing used in invoicing. For example, if the final pricing included the alternative prices for 1 week and 3 days, the allowances are accumulated based on the same alternative price card allowances.

When the Rental Term is a Prorated term, then the allowance levels will be prorated the same as the rental price is prorated.

- **Rental Availability Calendar Enhancements**

- Ability to specify on Visual Calendar Setup, whether the Filtering page is displayed when opening the global Rental Avail. Calendar so filters can be set before displaying the calendar data.
- Rental Group Quantity displays in red if quantity available falls below the Availability Warning quantity specified on the group unit card.
- The Location field has been added to display the Rental Unit Location in the calendar, on the calendar bars and in pop-up messages when pointing to the reserved and on rent calendar bars.
- When open the Availability Calendar from the Rental Lines, if your cursor is on a rental line with a rental unit, then the calendar opens with the Start Date filter set to the Rental Start Date on the line.

- **Returning Rental Units to a Different Rental Location**

The returning of units to different rental locations has been expanded to include units with Allow Overbooking enabled and are not linked an Item or Fixed Asset.

- **Rental Unit Lists are Filtered by Default to Not Include Units with the Inactive Field Enabled.**

The filter can be cleared on the Rental Unit lists to show the inactive units, if desired.

- **Rental Unit Card Modified**  
The Rental Unit card has been modified to restrict the enabling of the Sub Rental field to units assigned to a rental group. The Group No. field must be populated to enable the Sub Rental field.
- **Rental documents have been restricted to disallow renaming of the No. field.**

## Issues Resolved

- Rental Availability Calendar on Fire Fox displayed an incorrect separator character in date title.
- Rental Credit Memos when created for Roll-up Rental Packages by running Create Rental Corrective Credit Memo are printing incorrect pricing details.
- Deletion of group child unit no. selected on rental line does not clear the fields, Location Code and Qty. to Rent.
- When using Rental Exchange where none of the original unit are being returned and the Rental Return Date is blank on the rental lines, then the new unit rental lines, Rental Billing Start Date-Time field are being set to incorrect Date and Time.
- Metered Usage: When invoice and do a Corrective Rental Credit Memo, the re-invoicing, if needed, is not being allowed.
- Undo Return generates an error if the No. Series is greater than 10 Characters.
- Rental fields on the General Prod. Posting Group, General Business Posting Group, and Customer Posting Group have been expanded to 20 characters.
- On Roll-up package when enter Return Location on a component line a pop-up message related to Price Allocation pkgs. occurs when should not.
- On a Roll-up Package on a contract with the Rental Return Date = blank and enter the Rental Return Date and then modify the Rental End Billing Date an error occurs.
- Rental Change Log returns an error when the table has been setup with All fields on insertion, Modify, and Delete.
- On Sub Rental Purchase Order when invoicing and there are lines with Qty to invoice = 0, these are being incremented and should not be.
- On contracts with Blank Return Date the updating of the rental group line, Return Date after exchanging a unit that is not returned is updating the Initial Unit Rental Billing End Date-Time when should not.
- The Contract Total field does not update when add a Sales Line.
- When using the Default Qty. to Rent = Blank and attempt to enter the Qty. to Rent on a component line of a Price Allocation Package an error occurs.
- Proforma Invoice with multiple Roll-up Pkgs. only prints the 1st package on the Proforma Invoice report from the contract.

- Accrual Journal Calculation is generating accrual records rental lines which have been invoiced to the end of the month.
- Rental Unit Statistics, Rental Revenue net of Service Costs and Depreciation formula is adding back the Depreciation expense rather than subtracting the amount.
- In companies where the Rental Management Setup has not been opened, an error occurs when try to open Fixed Asset, Item, Resource, Job, and General Posting Setup. And the Role Center cues for standard Business Central do not display the quantities and are greyed out.
- When a User Defined Billing Term is entered on the rental lines, the To Date on the rental line Billing Schedule lines after the first line are not being correctly calculated.
- When Rental Units with Metered Usage enabled are entered on the rental lines with a default Rental Term and a Price card with a Metered Usage Base Price, then an error occurs if the Rental Term is changed to a User Defined Billing Term.

## Known Issues

- The Accrual Journal calculation was generating records for rental lines which had been invoice to the end of the month the calculation was being ran for when no records should have been created.
- The Accrual Journal calculation for Rental Terms with Prorate enabled where Deferral type records were generated was setting the Deferral Amount as a positive amount when should have been a negative amount.
- The Accrual Journal calculation when the Rental Management Setup, Reversal Date Calculation option was set as "Last Day of Accrual" was not generating records when the Calculate Rental Accrual was ran for the second accounting period.
- On the Rental Contract Sales lines, the Qty. to Sip and Qty. to Invoice could be modified after the Quantity on the line had been fully invoiced.
- The Rental Availability Calendar was not displaying correctly when Collapse All was selected.
- The Rental Accrual Calculation is not generating accrual records when Invoices have been posted in the following month where days were invoiced in the current month prior to running the Calculate Rental Accrual for the current month ending.
- When using a Roll-up Package and component pricing includes Additional Fee charges, the Rental Quote and Rental Contract are double adding the amounts to be billed for the Additional Fee charges.
- When an open Advanced Proforma Invoice exists, the Undo Shipment can be ran on the Rental Contract when should not be allowed.
- Damage Waiver & Additional Fees with Include Usage enabled are not including the Periodic Usage Standby Charge amounts in the base to calculate the Damage Waiver and Additional Fee when the type is Percent.

- In the Dispatch Rental Lines - Line - Addresses, the caption for the Zip Code field is Post Code, when should be Zip Code.
- In Rentals Dispatch the Ship-From Address is missing the Zip Code on the Planning lines for Sales Line Items. When rental lines contain a group with the child units selected and a single unit, then when a Delivery Load is created the Zip Code is missing in the Delivery Load and Trip lines, Ship From Address.
- In Rentals Dispatch when on a Rental Unit, Resource, Fixed Asset the Weight Unit set to one of the options of lbs. or kilograms, and enter the Gross Weight, Net Weight, Max Transport Gross Weight and Max Transport Net Weight and then change the Weight Unit to the other option, then the Gross Weight and Net Weight fields are not being converted.
- When processing a Rental Exchange or Rental Swap for a unit entered on a rental line which is assigned to a rental group, however, the rental group is not entered on the rental lines and neither the group or rental unit have a Rental Price card for the Rental Term on the line, then an error occurs disallowing a rental exchange or a rental swap.
- On Rental Quotes, when a Billing Cycle Type and Default Invoicing Period Code defaults from a Customer card or Rental Management Setup, or is entered on the Invoice Details tab, when enter units on rental lines with Prorated term, the Billing Cycle Date does not get populated.
- When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.

## UPCOMING Releases - Planned Modifications and New Features

- Rental Dispatch Phase 2
- Renumbering of Rental Group No.
- Additional Reports
  - Utilization enhancements for shipped but not invoiced
  - Industries
  - Daily Invoicing Reports
  - 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