



ODT Rentals

North America
Release Notes V11.0.0.0

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What's New

- **Rental Shipping has been enhanced to include the shipping of Sales Lines**
The enhancement for the shipping of the sales lines provides the ability to ship sales lines separately from invoicing, including partial shipments and partial invoicing of shipped sales lines.
This feature includes the creation of a Sales Order which is linked to the Rental Contract that remains open as long as the contract is open.
The Ship Rentals menu option ships the sales lines based on the Qty to Ship on the Sales Lines and synchronized linked Sales Order.
On the linked Sales Order Warehouse Shipments can be created for Locations that have Require Shipment enabled on the Warehouse tab.
The feature also provides the ability to Undo Shipments for sales lines from the Posted Sales Shipment which undoes the shipment on the Sales Order and updates the Sales Lines on the contract.

Upgrade Notes

On legacy contract the Sales lines that are fully shipped and invoiced cannot be modified.

Sales lines partially shipped and invoiced will be processed when the contract is invoiced the same as the prior rental releases.

If any sales line have not been shipped, then a Sales Order will be created for the sales lines not shipped on the contract sales lines.

Important Notes regarding linked Sales Orders and Warehouse Shipments

When a Sales Order is linked to a Rental Contract the sales order cannot be modified.

On Warehouse Shipments created from the linked Sales Order only allow the posting of the shipment. Invoicing is not allowed.

When using Dispatch for the delivery and posting of sales line shipments, then creating Warehouse Shipments and posting the Warehouse shipment is not to be done.

- **The Corrective Rental Credit Memo has been enhanced to include the ability to credit and re-invoice Sales lines.**
A confirmation message has been added to Corrective Rental Credit Memo which allows user to chose whether the credited sales charges on the invoice will need to be re-invoiced or not. When the lines are to be re-invoiced, then new sales lines will be created for the sales charges that are on the posted invoice and will be credited. When the sales charge lines are not to be re-invoiced the sales charge line on the invoice will be credited.
- **Terms and Conditions**
ODT Rentals provides the ability to upload the organizations rental terms and conditions document to attach to Rental Quotes and Rental Contracts and print or send the document for Rental Quotes and Rental Contracts.
- **Opportunities**

ODT Rentals has been enhanced to include Business Central Opportunities on the rental documents.

- **Job Card has been enhanced with a new option, Transfer Sales Line to Rental Contract.** This option when enabled will transfer the Rental Quote Sales Lines to the Rental Contract when Make Contract is ran. This field can only be enabled on Jobs that have the option, Link Rental Cont. to JPL enabled.
- **Addition of Synchronization of Dimensions between a Rental Unit linked Fixed Asset.**
- **An Operators' License field added to ODT Rental Contract Header table and is available to add to the Rental Quote and Rental Contract page using Personalize.**
- **The Copy Rental Unit feature has been enhanced.**
 - Options for copying Category, Attributes and Dimensions have been added.
 - Copying a Rental Unit linked to a Master Record such as a Fixed Asset or Item, now only copies the Link Type. The Link Code is no longer copied to the new unit.
- **Transfer Orders for Rental Units linked to Inventory have been enhanced.** The Shipment Date and Receipt Date on the Transfer Order Lines are updated when the Shipment Date is updated on the Rental Line. Therefore, enhancing the integrity of the Inventory Availability.
- **Dispatch Pick List report has been added to the Dispatch Pick Worksheet.**
- **The 'Today' on the Availability Calendar from the Rental Line has been enhanced to set the Filter field, Start Date to be updated to the current date.**
- **The Rental Availability Calendars have been enhanced to "Reserved" as well as "On Rent" portions of the reservation when the "Shipment Date" is earlier than the "Rental Start Date" and the shipment has been posted.**
- **On the Rental Quote, Shipping tab the Shipment Date has been modified to display by default.**
- **On Rental Price cards, the Sales Type option of 'Campaign' has been removed as is not available in rentals.**
- **The order of the Dispatch Fact Boxes on the Planning Worksheet have been revised to display the Planning Line Details at the top followed by the Load fact boxes.**

Issues Resolved

- **When copy a rental group to create units as assigned to the group the new units are not displayed correctly on the Rental Unit list as the Indention field with 0 is copied from the group.** The Copy Rental Unit has been modified so that when copying a group, the new

units will have the Indentation field set to 1 so the units display correctly in the Rental Unit List.

- Rental Quote Dimension issues caused when:
 - The Customer card does not have Dimension Codes or Values and does not have Salesperson. When enter dimension codes & values on Quote and enter a Salesperson that has Dimension Code & Value on General tab, then the Dimension Code & Values that were entered manually on the quote are deleted and only the Dimension Code Salesperson & Value record is displayed in the Rental Quote Dimensions.
 - The Customer card has Dimension Codes, no Values and Code Mandatory and has Salesperson that has Dimension Code & Value. On Quote when open Dimensions, only the Salesperson Dimension Code & Value record is in the Quote Dimensions.
- Changing or selecting a Responsibility Center on a rental document on which Sales Lines exist returns an error.
- When on the Rental Line a Rental Unit has been entered and the Location Code and Bin Code has been specified and then change the Rental Unit No on the line, the Location Code and Bin Code data related to the initial unit are not cleared or updated.
- When a Fixed Asset that is linked to a Rental Unit has duplicate depreciation books the Rental Statistics does not display the correct amounts in the Acquisition Cost, Depreciation Code and Fixed Asset Net Book Value. The amounts displayed in these fields is including the amounts from the duplicate depreciation book when should not be.
- 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.
- The Rental Unit Availability Matrix issues include:
 - Rental Units that are Inactive are being displayed.
 - Rental Units that have a Service Status, 'In Service-Unavailable for Rental' are displayed with a quantity of 1 on the dates the unit is not available.
 - Rental Units that are reserved are displaying a quantity of 1 on the dates the unit is reserved when should display 0.
- When create a Rental Unit and assign Dimensions to the unit, if the unit is then deleted the ODT Default Dimension records are not deleted.
- When create a Rental Unit and assign Attributes with or without Attributes Values and then delete the unit the Attribute Value Mapping records are not deleted.
- Attributes assigned to a Rental Group are not flowing to the Rental Units assigned to the group.
- Rental Swap and Exchange issues resolved include:

- 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.
- When the Rental Lines contain a Rental Group and unit assigned to the group and neither the group card or unit card have a default Rental Term nor a Rental Price card for the Rental Term on the lines, then when swapping the Rental Unit, a message occurs for the new unit when should not be as the Rental Unit Price is copied from the initial Rental Unit line. An example of the message is: No prices exist for rental unit RU00002-003 for the term PE-MONTH, therefore the rental unit price will be set to zero.
- When billing Periodic Usage and the Rental Price card have Damage Waiver or Additional Fee Billing enabled with the Damage Waiver Pct. Incl Usage enabled, the calculation of the amount that the Damage Waiver or Additional Fee is to be based on is not including Standby Charges.
- The Sort No. on Sales Lines is being set to 0, if change the No. after initial entry which results in the rental reports not printing the Sales Charges in the same order as displayed on the Sales Lines.
- When a Rental Quote that contains Sales Lines from a Rental Unit, Group or Rental Package that have a Rental Sales Kit and run Make Contract the Rental Sales Kit lines on the Rental Contract Sales are doubled.
- Rental Accrual Journal issues resolved include:
 - The Calculate Rental Accrual is not generating records when an invoice is posted in the following month prior to running the Calculate Rental Accrual for the current month end accruals.
 - The Calculate Rental Accrual for Deferrals when Rental Lines have a Prorated Rental Term are setting the Deferred Amount as a positive amount when should be a negative amount.
- When a Rental Package Line, Return Date & Rental Billing End Date are initially blank, then entered, or are populated and changed after a component unit is returned early, then all component lines not returned have the Return Date and Rental Billing End Date updated. However, on the early returned component lines only the Rental Billing End Date is to be populated, or updated and were not updated.
- Changing the Rental Term on Rental Lines where the unit has been returned but not invoiced clears the Rental Return Date and Billing End date and related Date-Time fields.
- On Customer Document Layouts, when enter Customer Statement Usage and Report ID or vice versa, the Usage setting gets overridden in table to previous record.
- Changing the Rental Start Date in a different Time Zone from the zone the rental document was created is resulting in the incorrect time in the Rental Start Date-Time and Rental Billing Start Date-Time fields.

- On the Rental Invoicing Worksheet, the Invoice Amount is not including the Sales Lines when the Rental Contract Sales Line amount is negative.
- When the Shipment Date is modified on a Group line, then the Shipment Date is updating child unit lines that have been shipped and should not be.
- When an Advanced Proforma Invoice exists, undo shipment can be ran on the rental lines that are on the invoice lines.
- When changing the Rental Start Date after the Rental Unit has been shipped the Required Shipping Date is updated to the Rental Start Date which impacted the Reservation Entries.
- When a User Defined Billing term is selected on a Rental Line that has a unit with Metered Usage Enabled and has a price card which has the Metered Usage Base price specified an error occurs.
- On the Rental line Billing Schedule, the 'To Date' on lines after the first line are not calculating the correct date.
- When an ODT Approval Workflow setup is modified to have an added Condition of Contact Total > (an amount) and the amount of the quote or contract is less than the amount specified in the condition, then the approval response is still triggered advising the document must be approved when run Make Contract on the quote or Ship Rentals on a contract.
- Reservation Entries are being updated by any process on the Rental Contract that updates Rental Billing End Date when should not be.
- When creating a new Rental Quote or Contract using the Quick Rental feature and the Customer has the setup, Billing Cycle Type "Billing Cycle Date", then the Billing Cycle Date is not being populated on the Invoice Details tab of the rental document.
- When the Visual Calendar Setup, Open with Filter Options is enabled and open the Availability Calendar from the Rental line menu, then the default or selected Availability Option is not applied to the calendar records.
- When Attributes are set on Rental Units assigned to groups but are not assigned to the group and open the Rental Avail. Calendar with the Availability Open of 'All' and then Filter by Attributes the Rental Units assigned to the group are not displayed.
- When entering a Rental Unit which has a Price card for the default Rental Term on a unit that is a Hybrid Hourly Term or select the term on the Rental Line an error occurs advising that no prices exist and does not populate the Rental Unit Price fields on the Rental line.
- On the Rental Quote and Rental Contract reports when the Rental lines contain a Rental Package with Use Roll Up Pricing enabled and component units Price cards contain Additional Fee setup, then the Total Price on the reports for the package line are including the Additional Fee amount twice.
- The Rentals customization to Customer Report Selects cannot be further extended/customized for clients.
- Rentals Dispatch issues resolved include:

- Changing of the Weight Unit does not convert the Gross Weight and Net Weight quantities on the unit, item, fixed asset, or resource.
 - The Volume does not calculate when enter the measures of Height, Width and Length in any order other than Height, then Width, then Length.
 - The Dispatch Ship-from Address on the Dispatch load planning lines, load and trip lines are missing the Zip Code/Postal Code and Post Code.
 - The rental and sales lines, Line Addresses are missing the State (Province) fields.
 - When manually change the Dispatch Status on the Sales Lines an error occurs.
 - The Item Tracking Lines menu option is not selectable on the Dispatch load planning lines, load lines or Pick Worksheet when a Sales Line has an Item that has Item Tracking for Lots.
 - When a selected Job is for multiple customers and Jobs Setup has the setting where all or both or one Global Dimensions set to populate rental documents the on posting an invoice on a contract an error can occur depending on the Job and Customer Dimension setups.
 - The Contact is not flowing through to the applicable fields on the Delivery and Pickup load cards, Dispatch load list pages, Pickup Load lines and the Jobs, Job Rental Summary page.
 - The Transport Type and Planning Quantity can be modified on the Dispatch planning Worksheet after the Dispatch Load has been created.
- The Rental Setup Wizard returns an error when the menu option is selected.\

Known Issues

- The Invoice and Print from the Rental Contract does not print the invoice for any of the browser 'Print' settings. Work around is to print the Rental invoice from the Posted Invoices.
- When using a Rental Term with the Prorate option of 'Prorate after Specified Period' in conjunction with Billing Cycle Type of 'Billing Cycle Date', the first rental period is still prorated when the Billing Cycle Date on the Invoice Details results in the first period being a partial period.
- Rental Quote and Rental Contract: When creating a quote or contract and the Last No. Used is incorrect with the number being a lower number than the existing quote/contract numbers does not error & creates a quote/contract.
- The Calculate Rental Accrual on the Accrual Journal calculation is incorrect for User Defined Billing with Initial Billing = Fixed Fee and PSDAY (or PEDAY) with Billing Method = Duration.
- Contract Total is showing incorrect amount due to tax rounding.

- On the Rental Quote or Contract Header - User Defined Billing Term lines an error occurs when attempt to change the Day To formula on any line except the last line.

UPCOMING Releases - Planned Modifications and New Features

- Rental Dispatch Phase 3.
- Renumbering of Rental Group No. and Rental Packages.
- Tracking communications on a rental contract.
- Rental Notifications via Email or SMS for:
 - Due to be returned.
 - Extending rental.
 - Service required.
- Emailing rental document with remote signature capture.
- List from customer card displaying a list of rental units currently on rent to the customer.
- Take Pictures feature for Delivery/Shipment and Return documents.
- Additional Reports
 - Outstanding Contract Amount
 - 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