



ODT Rentals

Release Notes V12.0.1.0

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

www.opendoorerp.com

What's New

- Interaction logging functionality has been added for Email and Send of Rental Quotes and Rental Contracts using the Dynamics 365 Business Central Interaction Logging. The Interaction Group is to be named RENTAL, and the Interaction Templates are to be named R_QUOTE and R_CONTRACT on the Interaction Templates Setup. The Interaction Log Entries can be accessed from the Rental Quote, Completed Rental Quote, Rental Contract and Completed Rental Contract on the Related - History menu option.
- Payment Service functionality has been added to the Posted Rental Invoice and Rental Invoice document. When a Payment Service that is setup and enabled is selected on the Invoice Details tab and "Send" a Posted Rental Invoice then the customer can make payment by selecting the logo or link on the PDF file they receive.
- Remote Signature Capture functionality using DocuSign has been added for the Rental Quote and Rental Contract. Additional document signing services or platforms will be added in a future release.

NOTE: The setup and configuration of the Remote Signature Capture functionality is complex and should only be attempted by knowledgeable personnel. Assistance is available from Opendoor.

- A list of "Units on Rent" has been added to the Customer card, which displays a listing of Rental Units that are still out on rent. The list is accessed from the Related, Rental menu option.
- An Outstanding Contract Amount report has been added which provides a listing by open contract which contains the Rental Contract No., Customer No., Customer Name, External Document No., Job No., Contract Total, Billed Amount and Remaining Amount with Report Totals. The amounts are excluding tax.
- On the Posted Rental Delivery and Posted Rental Return documents the ability to take pictures has been added to including the ability to take multiple pictures for the document itself and per rental line. Two factbox's have been added for the taking of pictures and displaying the pictures of the rental product, if required. One for pictures that will be linked to the document header, and the other for linking pictures to the selected rental line.

To save pictures to OneDrive or resize pictures are manual processes. From the Gallery, accessed from the factbox, the photos can be resized by selecting Actions, Resize. For organizations that want to save the pictures to OneDrive, this can be done using Actions, Save to OneDrive.

NOTE: Functionality to automatically save pictures to a shared OneDrive URL will be added in a future release.

- Rental Groups and Rental Packages can be renumbered.

- A setup option, Suppress the Confirm Posting Date, has been added to the Rental Management Setup tab, Suppress Confirmation Messages, which when enabled the following message will not occur and the Rental Return Date will not be updated on any Rental Lines. Message is: You have modified Posting Date and there are 1 or more lines with an earlier Return Date. Do you want to update the Return Date on all open and rented rental lines? Yes/No
- The Rental Quote has been enhanced to include:
 - The ability to specify a Quote Loss Reason on the General tab when Show more is selected. The Quote Loss Reason field looks up to the Close-Opportunity Codes list for selection of the applicable code. The field has been added to the Rental Quote and Completed Rental Quote lists.
 - The Quote No. field has been added to the Rental Contract and Completed Rental Contract lists.
 - The Rental Quote report has been enhanced to include an option on the report request page called Show Group Details. When the Show Group Details option is disabled, then the group child units will not be printed, when the Show Rental Details is enabled. The group, group qty., group total price and the pricing details print at the group level. When the Show Rental Details option is disabled, then the report prints per this setting and does not apply the Show Group Details setting not applied.

When the Show Group Details is enabled, then the report prints as per the other option field settings on the request page.

On Rental Management Setup, Documents tab a Show Group Details field has been added as a global default field. The setting will default to the Rental Quote report request page. **NOTE:** This option is not applied to groups within a Rental Package.

- Auto Credit Memo has been enhanced to provide an informational message when the Auto Post Auto Credit is not enabled on Rental Management Setup advising that a Sales Credit Memo has been created and must be manually posted.
- The Terms and Conditions menu option has been added to the Business Manager role center in the Actions, Rental Management menu options.
- Rental Dispatch enhancements and modifications include:
 - Global options, Update Requested Delivery Date and Update Requested Pickup Date have been added to the Dispatch tab on Rental Management Setup. The fields are for specifying whether the Requested Delivery Date is to be automatically updated if the Rental Start Date is modified and whether the Requested Pickup Date is to be automatically updated if the Rental Return Date is modified. By default, the fields are disabled which means the dates will not be updated if the Rental Start Date or Rental Return Dates are modified. When the fields are enabled, then the dates will be updated.

- When using the Advanced Sales Line Shipping and a Warehouse Shipment has been created from the linked Sales Order, the Dispatch Status is not allowed to be set to Delivery. When run Release for Delivery the Dispatch Status will not be set to Deliver. If the user tries to manually change the Dispatch Status on the Sales Line an error will occur advising; Warehouse Shipment is currently in progress. Dispatch Status can't be changed for (rental contract no.) Line No. (#####). If a Sales Line does have a Dispatch Status of Delivery and then a Warehouse Shipment is created from the Sales Order, an error will occur if a user tries to post the Ship from Warehouse Shipment.
 - The Role Center, Rental Dispatch menu, the sub menu, Load Planning Worksheet, and the page that opens when selected have been renamed to Planning Worksheet.
 - On the Rental Contract, Dispatch menu, the sub menu, Load Planning, and the page that opens when selected have been renamed to Planning Worksheet.
 - On the Rental Contract, Dispatch menu, the sub menu, All Loads, has been renamed to Open Load.
 - On the Rental Contract, the Dispatch Summary menu option on the Rental Lines, Manage menu option has been moved to the Rental Contract, Dispatch menu.
 - The Jobs cue list is now filtered to exclude Jobs with a Status of Completed.
 - On the Pick Worksheet the Pickup Date filter field and the two factbox's have been removed. On the Dispatch Picklist request page, the option Print Additional Notes has been removed.
 - A Booked Cue has been added to the Trip Cues and the order of the Trip Cues have been changed to Today, Future, Booked, In-Progress, Completed.
- The Document Signatures factbox part has been added to the Sales Quote, Sales Order and Sales Invoice documents. When the required signatures are setup in the Signature Setup for these sales documents, then the signatures can be captured on the documents.

Issues Resolved

- On the Proforma Invoice when the Cut-off Date is for multiple periods the VAT Base and VAT Amount are not filtered by the Cut-off Date.
- The Invoice and Print from the Rental Contract does not print the invoice for any of the browser 'Print' settings.
- 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.
- On the Rental Unit card, a Link Code can be typed in when the Link Type field is blank.
- On Rental Lines with a Rental Group and the Rental Unit Nos. has been entered on the child lines, if a child unit no. is deleted, then the Rental Quantity on the child line is being deleted when should not be deleted.

- On the Rental Term List, when the Prorate option of Last Partial Period Only is on a term, then the Prorate field in the list page does not display the option correctly.
- The Contract Total on the General Tab of a Rental Contract is not recalculating when rental lines have blank return date, enter the date, then clear the date.
- Dispatch Issues:
 - On the Role Centers, Rentals Dispatch menu the "Pin the navigation bar" does not pin the menu.
 - On the Planning Worksheet the Calculate Loads per Job & Location and Create Loads per Job & Location the Delivery Loads created using these options do not have the Sell-to Customer field populated.
 - When printing a Dispatch Delivery Load or Pickup Load that has a Rental Unit linked to an Item on a Dispatch Load Lines, only the Item No. is printing, and the Rental Unit No. is not being printed.
 - The calendar opens as Day based on users' work date and does not provide a means to change the date on the calendar (Date Filter). The User must either change their work date or use Next until reach date they need to determine availability of the resources. Not user friendly or efficient.
 - On the Rental Contract the Line Addresses of Ship to Address and Return to Address can be modified when rental/sales line has a Dispatch Status and should not be able to modify them when the line has a Dispatch Status.
 - On the Planning Worksheet the Load Statistics factbox:
 - The Vehicle section displays data when the planning lines do not have a Vehicle assigned.
 - The address in the fact box is not displaying the correct data from the ship from address when the planning line has a Type of Pickup
 - On the Rental Contract, Shipping tab the Ship-to can be changed and updates Line Addresses when the lines have a Dispatch Status.

Known Issues

- When the Rental Management Default Calendar Period is set to a different period than the coded default of WEEK, for example MONTH, then the main Rental Avail. Calendar (from Role Center menu) opens in WEEK view when should open in a MONTH view.
- When on a Rental Contract after running Release for Delivery or change the Dispatch Status on a rental line to Delivery the Requested Delivery Date on a Rental Line is changed an error occurs advising that the date cannot be changed as Dispatch is in Process. If select Refresh (F5) to roll back the entered date and Delivery Date on the planning line, the Delivery Date on the Planning Line is not rolled back.
- When on a Rental Contract after running Release for Pickup or change the Dispatch Status on a rental line to Pickup and the Requested Pickup Date on a Rental Line is changed an

error occurs advising that the date cannot be changed as Dispatch is in Process. If select Refresh (F5) to roll back the entered date and Pickup Date on the planning line, the Pickup Date on the Planning Line is not rolled back. And is populating the Planning Line, Required Shipping Date with the date that was entered on the Requested Pickup Date on Rental Line when should not be.

- When the Sales Line dimensions are changed after shipping the sales line, the revised dimensions are not carried forward to the Invoice line.
- 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.
- Contract Total is showing incorrect amount due to tax rounding.

UPCOMING Releases - Planned Modifications and New Features

- Rental Dispatch Phase 3.
- Add Quick Rental to Rental Availability Calendar,
- Location Summary drill down from Availability Matrix, and drill down on the location to the units.
- Rental Notifications via Email or SMS
- Add Rentals to Business Central Dimension Priorities.
- Enhance the email scenario assigned in Sales Invoices to include Post and Send Invoices on the Rental Invoicing Worksheet and the Invoice and Send on Rental Contracts.
- Additional Reports
 - Forecast Contract Revenue Report
 - 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