



# ODT Rentals

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**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

- A feature has been added for Rental Units linked to Fixed Assets which provides the ability to specify that the Inactive field on the Rental Unit and Fixed Asset are to be automatically enabled when the linked asset is disposed of.
- The external connectors for the Remote Signature Capture using DocuSign and the Take Pictures functionality have been transitioned to the ODTBA (Base Application) Connectors. The features have also been enhanced to provide the ability to automatically save the signed documents and/or pictures to an online drive. The ODTBA and ODT Rentals currently support OneDrive and SharePoint. Rental Management Setup has been enhanced with tabs for specifying the connectors and the archive folders for signed documents and the pictures once the external connectors for DocuSign and the preferred online drive have been setup.
- The Pictures Gallery for the Posted Rental Delivery and Posted Rental Return documents resizing and rotating the pictures in the gallery have been enhanced. The naming convention of the filename of pictures taken in the Rental Delivery Picture and Rental Return Picture fact boxes consists of the Document No. - number of the picture. For example, the filenames of two pictures taken in the Rental Delivery Picture factbox would be RD00001-1.jpg and RD00001-2.jpg. The naming convention of the filename of pictures taken in the Rental Delivery Line Picture and Rental Return Line Picture consists of Document No. - Rental Line No.\_number of the picture. For example, the filenames of two pictures taken in the Rental Delivery Line Picture factbox for Rental Line 10000 would be RD00001-10000\_1.jpg and RD00001-10000\_2.jpg.
- The Rental Accrual/Deferral feature has been enhanced to include the calculation of deferred revenue related to invoicing that had been posted using the Advanced Billing feature.
- The Rental Quote Archive feature has been enhanced to include archiving and restoring of the Dispatch Rental and Sales Line Addresses.
- The Copy Document feature has been enhanced to copy the Dispatch Rental and Sales Line Addresses when the Recalculate Lines field is disabled on the Copy Document page.
- On the Rental Management Setup, the Default Rental Calendar is now a mandatory field.
- The External Document No. field has been added to the Rental Quote List.
- The Dispatch Line Addresses on the rental documents has been enhanced to automatically update the "Return from Address" when the "Ship to Address" is modified.
- The Dispatch Jobs Ship-to has been enhanced to include the Ship-to options of Job Address and Site Address.
- Rental Approval Workflows have been enhanced to include the capability to use various Approver Types and Approver Limit Types combinations.

## Issues Resolved

- When Allow Overbooking is not enabled and Dispatch is enabled, then the Availability calculations are not working correctly in all situations for Group children and Single rental units.
- When populating the Rental Unit No. field on the Rental Lines using the look-up, after selecting the group, unit or package the cursor repositions to the first rental line.
- When a non-rental location is setup on Company Information and defaults to the rental documents an error occurs.
- When on Sales & Receivable Setup the Default Item Quantity is enabled and the Advanced Sales Line Shipping is enabled on Rental Management Setup, then an error occurs as soon as an Item is selected on the Sales Lines. If the Advanced Sales Line Shipping is not enabled, then when enter an Item on the Sales Line the Quantity is not set to 1.
- On the Rental Return document, the Ship-to Contact field with 50 characters caused an error when posting returns. The field has been increased to 100 characters.
- The Rental Quote report has gaps in the Rental Charge section when any rental unit lines have Additional Notes and the Show Group Details field on the print request page is disabled.
- When copying a rental group of a rental unit assigned to a group that have Attributes linked to a Category and no Attribute Values are specified, then an error occurs related to the Attribute Value Mapping.
- The Posted Rental Invoice is not printing correctly when an invoice is posted using Advanced Billing and the rental lines contain a group, but the child units have not been selected on the rental lines.
- When invoicing using Advanced Billing the “service type” items are not being billed when both Advanced Sales Line Shipping and Dispatch are activated on Rental Management Setup.
- Rental Approval Workflow issues with Approver User Setup fields for Rental Amount Approval Limits and Approver Chain have been addressed.
- Dispatch Issues:
  - Split Planning Line returns an error on planning lines with a rental unit linked to an item.
  - Posting of Dispatch Loads generates an error & aborts posting as is checking Sales Lines for non-inventory items are not included in dispatch and do not have a Location.
  - When creating the planning lines for Pickup lines, the "Package Parent Line No." and the Package Roll-up" fields are not being populated.

- Line Addresses do not flow from the Rental Quote lines to the contract lines when run Make Contract.
- When run Make Contract from a quote, then Requested delivery date on rental group child unit lines are not transferred correctly.

## Known Issues

- Job Integration Templates with Enhanced Ship-to Options for Job Addresses and Site Addresses are not updated on Rental Quote Ship-to fields on Shipping Tab when Job Template selected on General tab.
- When on Rental Management Setup, the defaults for FA Location Mandatory and FA Transfer In-Transit Location are not configured and return a unit linked to a FA to a Temp or different location, the Rental Unit Location does not get updated to the Temp or different location.
- When on a Rental Group the Allow Overbooking is not enabled, then on the Rental Quote there are issues with the entry of the Group rental quantity and subsequent modification of the rental quantity has 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.