



# ODT Rentals 365

Release Notes V2.2.0.0

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## What's New

- **Business Manager and Sales Order Processor Role Centers revised for new Business Central user interface**

Sales order processor Rental Reports location has changed. The Rental Reports are now accessed from the Actions – Reports – Rentals menu.
- **Global Pending Shipments and Pending Returns has been enhanced**
  - The naming of the Cue category has been changed to Contracts Ship/Return
  - In the Contracts Ship/Return category the cues have been changed to include Shipments Due Today, Shipments- Future and Returns
  - A new cue category, Units Ship/Return, has been added which contains two cues, To Ship and To Return, which list the outstanding shipments and returns on a unit basis.

From the To Ship cue listing, a Pick List can be printed, which can be filtered to include the desired units. The Pick List report is by unit which are grouped by Rental Contract and includes sign-off signature lines as the end of the list.
- **Automation for creating a Fixed Asset and Rental Unit at the same time**

The ODT Rentals provides for the ability to copy a Rental Unit to create 1 or many units and automatically create Fixed Assets at the same time. With this feature, the assets created will be linked to the units created on a one-to-one basis.
- **Creation of a Rental Quote using a Contact**

The ODT Rentals provides the ability to create a Rental Quote for a Contact. This feature contains the same functionality, as when creating a Sales Quote using a Contact.
- **Availability for Rental Units Linked to Inventory Items**
- **Partial Shipments and Partial Returns**
- **Blank Return Date**

Providing the ability to configure the rentals to not require the entry of a Rental Return Date on rental lines of quotes and contracts, to facilitate indefinite rentals. In addition, includes the ability to, on a per rental line have a blank Rental Return Date whether or not the global setting on Rental Management is selected or not.
- **Change from a separate Posted Rental Invoice List and Page, to using the standard Posted Sales Invoice List and Page and add the Rental related options to the list and page.**
- **Rental Credit Memos**

The Create Corrective Credit Memo option on Posted Sales/Rental Invoices, now generates Rental Value Entries so that Rental Units – Rental Value Entries contain the credit transactions.  
A new Create Corrective Rental Credit Memo option has been added to the posted Sales/Rental Invoices, which in addition to creating the Rental Value Entries, reverses the most currently posted invoice and opens the Rental Amount lines that were on the invoice to allow for re-billing.
- **Single Level Proforma Invoice Report**

A new Proforma Invoice (pre- posting) has been added to Rental Contracts and the Rental Invoicing Worksheet which will display what will be billed to the customer based on a Cut-off Date entered by the user.

## Issues Resolved

- **The Rental Invoice document prints showing the full rental price in the details, and prints the discounted amount after the = sign**  
The document has been revised to print the discounted rental price in the details.
- **Users could change the Rental quantity to greater than one when Allow Unit Overbooking was not activated**  
For group child units, units linked to Fixed Assets, Resources or G/L Accounts users can no longer change the quantity to greater than one.
- **Users could change the Location on the rental line of a single unit entry, without an error occurring**  
An error will now occur advising users they cannot change the Location of the unit, when defaulted from the Rental Unit card.
- **Rental Amount Lines were being created for Rental Unit Group lines, if the user reviewed the Group Availability Matrix, before moving off the rental line**  
Coding was changed to ensure this issue does not occur.
- **Users were not able to change the Rental Start Date on a Rental Line Unit Group Entry until they moved off line**  
Coding was changed to allow users to change the Rental Start Date.

## UPCOMING Releases – Planned Modifications and New Features

- **Sub-Rental functionality**  
The Sub-Rentals feature addresses the need by many rental businesses to source equipment from their suppliers or alternate suppliers, if they do not have enough equipment on hand to meet the requirements of their customers. Rental Units specified as Sub-Rental will automatically allow for entry on multiple contracts for the same or overlapping rental dates. A Purchase Orders can be created directly from and viewed from the Rental Contract. The feature as well provides for recurring Purchase Orders and for specifying the sub-rental from a contract have been returned to the vendor.
- **Swapping Rental Units in a Group which are Out on Rent**  
A swapping feature added, which provides the feature for swapping units out on rent with replacement units for units within a group on the Rental Lines. The swapping feature allows for the swapping to be done after an invoice has been posted on the contract.
- **Rental Additional Notes**  
Addition of the ability to add Notes to rental documents, without having to add the notes on the rental lines of Rental Quote and Rental Contracts.
- **Addition of the ability to add a picture to Rental Unit**

- **Add service status with reservations created for select statuses**
- **Rental Kits feature**

The Rental Kits feature enables the packaging of multiple products into a kit. The products entered in a kit, will automatically populate the quote and contract lines, when a kit is entered on the line.
- **Rental Unit Statistics including profitability analysis**

Rental Unit Statistic view to be added, along with a Profitability Analysis view.
- **Putting a Rental on Hold**

Addition of a feature to be able to put a rental on hold.
- **Rental Unit Categories and Attributes**

Rental Categories and Attributes are similar to the Item Attributes. In the Rentals App the Rental Categories are for sorting your equipment into logical groups to make managing and tracking your rental fleet easier. The Attributes are for defining the unique characteristics, such as Make, Model, Size, etc. And the Attribute Values are for defining the possible values for each Attribute. Categories assigned to a Rental Unit Group will default the Category and Attributes to the linked rental units, where the Attribute Values are selected for each unit.
- **Addition of the ability to add header & line comments to Rental Quotes and Rental Contracts for internal use**
- **Addition of a link on the Customers cards to view rental history**
- **Modification to the Rental Unit card adding a Suggested Sale Price field.**