



# ODT Rentals 365

Release Notes V2.3.0.2

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## What's New

- **Business Manager and Sales Order Processor Role Centers modified to include a new action option from Rental Management**  
The action option of Sub-Rental Worksheet has been added for reviewing the sub-rentals and specifying when they have been returned to the vendor.
- **Partial Shipments enhanced to enable partial shipments of multiple rental quantities for units linked to Fixed Assets, Resources and G/L Accounts**
- **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 a Sub Rental Worksheet which displays all units sub contracted that have not been flagged as 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 either before or after an invoice has been posted on the contract.
- **Rental Additional Notes**  
Addition of the ability to add notes to user specified rental documents, without having to add the notes directly on the rental lines of Rental Quote and Rental Contracts. Thus providing the ability to have notes only print on the applicable rental documents.
- **Entry of Standard Text Codes on Rental Lines**  
Addition of the ability to enter Standard Text Codes on rental lines on rental documents, with extended text lines.
- **Attaching a Picture to a Rental Unit Card**  
ODT Rentals added the ability to add a picture of the rental product to the Rental Unit card.
- **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. In addition, a picture can be attached to Rental Categories, which can be used as a default Web picture.
- **Add a Service Status to a Rental Unit**  
The Service Status options contain options which when selected, will create a reservations entry so that the unit will not be available to rent out. Other options which will not create a reservation entry, thus enabling the unit to still be rented out. In addition, there is an option that can manually

reserve the unit and an option to manually mark the unit as expired which automatically sets the unit as Inactive.

- **Customer lookup to rental history**  
ODT Rentals provides the ability to view a Customer's Rental History from the Customer Card.

## Issues Resolved

- **Users were able to de-select Group No, then link to item, then re-assign to group when units linked to items are not to be assigned to a group.**  
Coding was added to prevent users from performing the notes steps to get around not being able to add a unit linked to an item from being assigned to a group.

## UPCOMING Releases – Planned Modifications and New Features

- **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.
- **Addition of the Rental Unit Statistics to the Fixed Asset card**
- **Creation of ODT Service module**
- **Planned Maintenance**
- **Linking of Service orders from ODT Service module to Rental Contracts with charge-back capability**
- **Addition of Deposit Capability to Rental Quotes and Rental Contracts**
- **Bulk return of Rental Units**
- **Price list report by Customer, Customer Group, all Customers and by campaign**
- **Modification to the Rental Unit card adding a Suggested Sale Price field**
- **Address mapping link for contract sell-to and ship-to addresses**
- **Addition of link to Rental Prices on the Rental Quotes and Contracts ribbon tab of Rental Lines – Line.**
- **Addition of Dimensions to ODT rentals**
- **Periodic Usage pricing functionality**
- **Web option kit field for displaying options on a web portal**