



ODT Rentals 365

Release Notes V2.7.0.0

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What's New

- **Rental Packages**
The Rental Package functionality provides the ability to create packages containing unit groups and units, which are not linked to a rental unit. Rental Prices are assigned to the Rental Package in the same manner in which they are assigned to rental units. The components in the package will default to the rental lines below the Rental Package line on rental quotes and contracts.
- **Bulk Rental Returns**
The Bulk Rental Returns enables you to specify a Rental Return Date and automatically update all contract lines, Rental Return Date and Qty. to Return field, rather than having to update each line individually.
- **Enhancement to Foreign Currency transaction functionality**
Rental transactions can be processed in foreign currency without having Rental Price cards setup on the Rental Units for customer having a Currency Code specified on the Customer card. The system will automatically convert the local rental price setup on the unit price cards.
- **Rental Quote and Contract, Sales Lines have been enhanced to incorporate Item Special Prices**
When Special Prices are setup on Items and the item is selected on a rental quote or contract, then the special price will default to the sales line.
- **Salesperson field has been added to the Rental Quote and Contract general tab**
To view the Salesperson field the Show More is used. The salesperson code defaults from the Customer card, however, can be entered or overridden on the quote and contract.
- **Enhancement to Rental Documents**
Rental documents enhanced for the new feature, Rental Packages. An option to Show Rental Details added to Rental Quotes, Contracts and Proforma invoice. Canadian rental documents enhanced to print the taxes for GST and PST separately beneath the Subtotal.
- **Validation of Allow Posting From and Allow Posting To dates on User Setup and General Ledger Setup added to Rental Contract processing**
Posting Date errors now display and abort the process. Shipments, Returns, Invoices and Transfer Orders are no longer created when a Posting Date error occurs.
- **Posting errors for missing data now occur on the rental contract, and aborts both the posting and the creation of sales and inventory documents.**
Sales invoices and if applicable, Transfer orders are no longer created when data missing errors occur. Validation included for, but not limited to, Dimensions, Locations and Items linked to units.
- **The Tax Group Code field has been added to the Rental Lines on the Rental Quotes and Rental Contracts.**
The ability to edit the Tax Group Code is limited to Rental Package lines and unit groups and units not in a rental package entered on the lines. The Tax Group Code field component lines of a Rental Package cannot be edited to be different than the package line.

Issues Resolved

- **When printing a Posted Sales Invoice using print Rental Invoice and selected not to show the details for a rental, which contains either optimized or prorated pricing, the invoice is not printing the information correctly.**
The Rental invoice was modified to print the information for optimized and prorated pricing correctly.
- **The Rental Invoicing Worksheet options of Invoice and Invoice and Print are not filtering the invoicing to the selected records in the worksheet.**
Coding was modified to filter the posting of invoices to the records selected in the worksheet when selecting either Post Invoices or Post and Print Invoices.
- **The Tax Group Code was defaulting from Rental Unit cards, when should be defaulting from the Rental Unit Price Card, when configured.**
Coding was modified to default the tax group code from the price card. If no price card exists, then the tax group code will default from the rental unit card.
- **When extending a rental contract by entering a Posting Date later than the Rental Return Date on the rental lines, the confirmation message did not occur until user moved off the page or attempted to post on the contract.**
Coding was modified to generate the confirmation message when moving off the Posting Date field after entry.
- **Rental Invoicing Worksheet generates an error on a batch when contains a contract record and the contract had been deleted.**
Coding was modified to delete the Rental Invoicing Worksheet batch records for contract when rental contract are deleted.
- **More than a single rental line entry of a Sub Rental unit generated a reservation error message disallowing the entry.**
Coding was modified to not prevent the multiple entry of a Sub Rental unit on rental lines.

Known Issues

- **When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.**
- **Attribute Values added for Option Type attributes are not saving to the unit attribute.**
- **With the Group Availability Matrix open, users are unable to search by typing in Rental, Rental Unit or Unit, as this freezes the web client. A message of "Working on it" is displayed and does not complete the process. Users must close Chrome and re-open to continue working.**
- **When the Group Availability Matrix is opened from the command bar option of Rentals in the Business Manager and Sales Order Processor centers, the filtering fields cannot be edited.**
- **When a posted invoice has rental and sales charges, the sales charges were the last entry on the contract, then the posted rental invoice does not print the sales charges. Recommended workaround is to enter the sales charges on a rental quote and/or contract first.**

UPCOMING Releases – Planned Modifications and New Features

- **ODT Service Module**
- **ODT Planned Maintenance**
- **Deposit capability**
- **Linking of service orders to rental contracts with charge-back capability**
- **Price lists by customer, customer group, all customers and campaign**
- **Address mapping line for contract sell-to and ship-to addresses**
- **Putting a Rental on Hold**
- **Modification to the Rental Unit card adding a Suggested Sale Price field**
- **Add Rental Prices to Line/General tab in ribbon for Rental Quote & Contract**
- **Periodic Usage pricing**
- **Web option rental package field for displaying options on a web portal**