



# ODT Rentals 365

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## What's New

- **The Business Manager and Sales Order Processor Role Centers have been modified to comply with the forthcoming Microsoft April release for Microsoft Dynamics 365 Business Central.**  
Rentals is now located at the beginning of the main command bar on the home pages. The Rental Unit Utilization report in the Action section is now located under Reports – Rental Reports on the Business Manager Role Center and Reports – Rentals in the Sales Order Process Role Center.
- **Rental Price card and list from the Rental Unit card has been enhanced to include the Sales Type and Sales Code features. Filtering fields have been added to the Rental Price list for Rental Term, Sales Type, Sales Code, Starting Date and Currency Code.**  
The fields, Sales Type and Sales Code, have been added to the Rental Price cards, which enables the configuration of rental prices on rental units, groups and packages based on a combination of the Sales Type and Sales Code. The Sales Type options are comprised of All Customers, Customer Price Group and Campaign.  
The Sales Code field will provide a listing to choose from, based on the Sales Type selected, except for the type, All Customers. When the type selected is All Customers, then the Sales Code field cannot be edited as is for all customers.  
When a rental price card has been configured using the Sales Type and Sales Code, then the applicable price will default to the rental line for the customer selected on the rental quote or contract. Should there be multiple rental price cards that would apply to a customer, then the best price is determined and will default to the rental line.
- **Rental Price cards setup and modification has been enhanced to provide confirmation messages to enable automatic updating of alternative terms fields, when Alt1 and Alt 2 terms are specified on the rental term the price card is for.**  
When creating a new price card, which has alternative rental terms, on entering or modifying the Tax Group Code and enabling or disabling the Damage Waiver Billing on the price card, a confirmation message will be displayed. When Yes is selected the alternative term price cards will be updated to be the same as the entered or modified selection.
- **The functionality for rental units linked to items has been modified changing the posting of the Transfer Order to occur when the rental unit is shipped.**  
Transfer Orders are still automatically created on rental quotes, when the Commit Reservation is flagged and when a rental unit linked to an item is entered on a Rental Contract, Rental Lines. The Transfer Orders created cannot be edited, deleted or posted from the Transfer Order. A new field has been added to the Transfer Order, General tab called, Rental Transfer Order, which is enabled when the order is created from a Rental Contract. The Transfer Order will automatically be posted when the Ship Rentals is ran on the contract.
- **The Group Availability Matrix, Total Group field enhanced with drill down capability.**  
Added drill down capability on the Total Group Qty. field, with ability to drill down on, Reservations Exist field, which was added to open the Reservation entries related to the whole group. A menu option has been added to the Navigate menu, on the Reservation Entries page, to open the rental document for the selected record.
- **Address mapping has been added to the Rental Quote, Rental Contract and Posted Rental Delivery document cards.**

On the Rental Quote, Rental Contract document card, an option, "Show on Map", has been added to the General tab and the Shipping tab to display the location for the address related to the tab. On the Posted Delivery document the "Show on Map" is available on the General tab, when Show more is selected, and displayed by default on the Shipping tab.

- **The Rental Unit, Link Code field has been modified to prevent changing the selected master record when open or posted transactions exist.**
- **The Rental Category field on Rental units assigned to a rental unit group has been modified to ensure that units being assigned to a group have the same category as the group.**  
The Rental Category field can no longer be edited on units assigned to a group. When a unit currently has a rental category which is different from the group it is being assigned to, then the rental category will be updated to the group rental category.
- **Reservation entries for rental units has been modified to use the Required Shipping Date rather than the Rental Start Date to ensure the reservation covers the full time the units are reserved.**  
When an organization is overriding the Required Shipping Date, which is initially the same as the Rental Start Date, in the reservation entry, the Starting Date-Time field, for the unit now reflects the same date as the Required Shipping Date.
- **Rental Contract entry of Rental Unit groups with Additional Notes has been modified to default the additional notes from the group to the child unit rental lines, prior to the child units being selected.**

**NOTE:**

For additional details on the above modifications and new enhancements, please review the ODT Rental Online Help. The help can be accessed from the Business Manager and Sales Order Processor role centers, under Rental Management in the Actions section of the role centers.

## Issues Resolved

- **Sale Order Processor Role Center is missing the Rentals menu option, Rental Packages.**  
Rental Packages has been added to the Rentals menu options.
- **On Rental Quote and Contract Sales Lines, when the Line Amount Excl. Tax was modified the Line Discount % field was not automatically populated with the calculated percent.**  
Coding modified to calculate and populate the Line Discount % field on the Sales Lines.
- **On Rental Quote and Contract Sales Lines, when the Tax Group Code was changed the Line Amount Including Tax was not updating.**  
Coding has been modified to update the Amount Including Tax field when the Tax Group Code is changed on the Sales Line.
- **When a Rental Package contained package lines on which the Lock Quantity was checked on all the lines, a Rental Quantity of greater than 1 could be entered on the package rental line.**  
Coding has been modified to prevent the entry of a quantity greater than 1, when all rental package components have the Lock Quantity checked
- **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.**

Coding modified to enable users to edit the filtering fields.

- **On the Group Availability Matrix, when a Location was entered in the Location filter field and either Previous Set or Next Set was selected, the quantity in the date column was not updating.**  
Coding has been modified to calculate and display the quantities in the date columns, when selecting wither Previous Set or Next Set.
- **Salesperson code on contract not flowing thru to Posted Sales Invoice.**  
Coding was modified to carry forward the Salesperson code to the posted sales invoice.
- **When setting up a new Rental Category and when next adding a Parent Category or a Description an error was occurring. The Rental Category had to be closed and re-opened before selecting a Parent Category or entering the category Description.**  
Coding was modified to enable the selection of a Parent Category and entering of the Description without needing to close and re-open the Rental Category first.
- **Attribute Values added for Option Type attributes are not saving to the unit attribute.**  
Coding was modified to save the attribute value, when the type is option.
- **After selecting a child unit on a rental line beneath the group, users could change the location to different location, where the unit does not reside.**  
Coding was modified to prevent the changing of a location on the rental line of a child unit.
- **No error occurs when Invoice or Invoice & Print is ran, when the General Posting Setup is missing the Sales Acct. for Resources on the Sales Lines.**  
Coding has been modified to provide an error message and abort the invoicing process.
- **Rental documents printing issues. Posted Rental Invoice was not printing modified rental line description or sales charges when sales lines entered before rental lines. And when sales lines existed the sales charges were not printing the Sales Tax correctly.**  
All rental documents modified address the noted issues.
- **The Rental Term field, Rental Date Time Tracking, could be changed when Rental Ledger Entries exist or when the term was on an open quote or contract when ledger entries did not exist as yet. Thus causing issues with rental amount lines and billings to customers.**  
Coding has been modified to prevent the changing of the setting once a term is entered on a rental line or if rental ledger entries exist for the rental term.
- **Sales line, item availability verification was not occurring on the rental contract and quote.**  
Coding has been modified on the rental contract and quote, sales lines, to verify item availability.
- **When a rental package is on a rental line and use the look-up to the rental unit list and open the card it opens the rental unit card instead of the Rental Package card.**  
Coding modified to open the Rental Package card from the rental unit list, when a package is selected on the Rental Unit list which opens from the Rental Unit No. field on the rental lines.
- **On the Rental Invoicing Worksheet, when Validate was ran for Posting Date errors the amount fields on the records were not updating.**  
Coding modified to update the amount fields on the invoicing worksheet records when Validate is ran.

## Known Issues

- **When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.**
- **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.**

## UPCOMING Releases – Planned Modifications and New Features

- **Customer Rental Discounts**
- **ODT Service Module**
- **ODT Planned Maintenance**
- **Deposit capability**
- **Linking of service orders to rental contracts with charge-back capability**
- **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**