



ODT Rentals 365

Release Notes V3.0.0.0

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What's New

- **Time Zones for rentals has been added.**
Shipping, invoicing and returning unit can be done in a different Time Zone from the zone in which the quote and/or contract was created.
- **A Rental Line discounts feature has been added to the ODT Rentals.**
The rental line discount feature enables the setup on the Customer card(s) of a default rental line discount percentage and specific line discount percentages for when Rental Units are linked to Items, Fixed Assets, Resources and G/L Accounts. Also included is the ability to specify a default Rental Package line discount percentage. The Rental Quote and Rental Contract Invoice Details tab has been modified to include the Customer rental line discount fields and a Rental Line Discount % field. The Rental Line Discount % field will apply to all rental unit lines and overwrites the Customer card rental discounts applied to the rental lines. In essence, providing a discount on the full rental portion of a quote or contract.
- **The Name and Description fields for ODT Rentals now allows for the entry of 100 characters.**
- **Comments and Attachments have been added to the Rental Quote and Rental Contract cards**
Internal Comments and attachments can be entered the rental document cards. When entered on a Rental Quote, the comments and attachments flow through to the Rental Contract and subsequently to the Completed Rental Contract.
- **The Tax Group field has been added to the Rental Line fields on quotes and contracts.**
- **To Ship and To Return Cue pages have enhanced.**
The ability to post shipments and returns has been added to the To Ship and To Return lists. Included is the capability to specify a different Shipment or Return Date and Posting Date. For Returns the ability to specify a different Return Time is now available, when returning from the To Return Cue page. The new Return Time field is only available when the selected lines in the To Return list have a rental term which has been configured for Tracking Date and Time. In addition, on the To Ship list, the function, Create Sub Line, has been added.
- **The Create Default Data feature for evaluation companies has been enhanced to include the option to create Rental Packages.**
- **The Dimensions option has been added to the Rental Value Entries list when accessed from a Rental Contract or a Rental Unit for the viewing of the posted Dimensions.**
- **Rental Price List has been modified to open in View Mode rather than Edit Mode.**
- **The Rental Invoicing Worksheet has been modified to update the amount fields when the Validate is ran with Auto Extend flagged.**
When the contract has billable amounts after running Validate, the amounts are updated to reflect the amounts to be billed and the Ready to Invoice field is flagged. When there are no billable amounts after running Validate, then the amount fields are set to zero and the Ready to Invoice field is not flagged.

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

- **On the Rental Contract, Sales Lines, Items with a Type of either Service or Non-Inventory could not be sold.**
Coding has been modified to enable the sale of Items with a Type of Service or Non-Inventory.
- **On Rental Quote where a Contact not linked to a Customer has been specified, when an error occurs when running Make Contract, the Customer is still created when the contract is not created.**
Coding modified so that when an error occurs when running Make Contract, then the Customer is not created.
- **When a Rental Unit is linked to an Item that requires a Dimension, and the Dimension is not entered prior to selecting Ship Rentals, when the Dimension missing error occurs, the unit is shipped and a Rental Ledger Entry is posted, when should not be.**
Coding has been modified to prevent the posting of the Rental Unit shipping and generation of a Rental Ledger Entry.
- **A Rental Unit that did not have any Rental Ledger Entries could be deleted even though the unit was entered on a Rental Contract or Rental Quote.**
Coding has been modified to prevent the deletion of a unit when the unit has been entered on a quote or contract.
- **When a rental group was entered and the child rental units selected, but not shipped, on a Rental Quote or Rental Contract, when trying to clear the Rental Unit No. field on the child Rental Lines an error occurred preventing the clearing of the child Rental Unit No..**
Coding modified to enable users clear the Rental Unit No. field for child units selected in a group on the Rental Lines.
- **The automatic updating of Alternative term price card, Tax Group Codes was limited to only those rental terms which had the Optimize field enabled.**
Coding has been modified to include terms that do not have the Optimize field enabled.

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.
- When a partial shipment or partial return is processed when Additional Notes exist on the unit, the Additional Notes are not carried forward to the new lines created for the remaining quantity.

UPCOMING Releases – Planned Modifications and New Features

- **ODT Service Module integration**

- **ODT Planned Maintenance integration**
- **Linking of service orders to rental contracts with charge-back capability**
- **Metered Usage Pricing**
- **Periodic Usage pricing**
- **Deposit 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**