



ODT Rentals 365

North America

Release Notes V5.0.0.0

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Upgrading ODT Rentals 365 from Release 4.1 to Release 5.0

IMPORTANT

A modification has been made to the Location card, which restricts the activation of the fields on the Warehouse tab to Bin Mandatory, Default Bin Selection and the Calendar code fields, when Allow Rentals is activated. All other fields on the Warehouse tab cannot be active or activated, when Allow Rentals is activated.

Currently separate locations for rentals and sales/purchase are required, when warehouse options other than Bins Mandatory, Default Bin Selection and the Base Calendar Code.

The following notification will occur when upgrading to Release 5.0, should there be any Locations with Allow Rentals activated, and any of the disallowed fields on the Warehouse tab are activated.

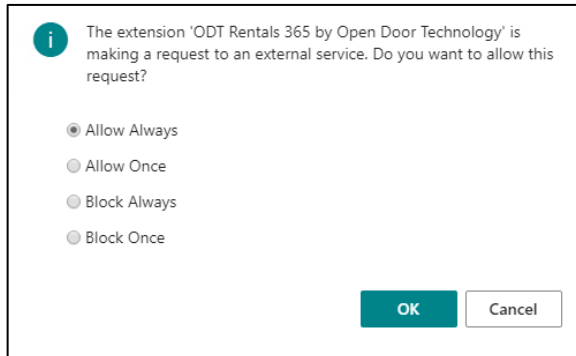
“Allow Rentals was disabled for some Locations due to conflicts between Rentals processing and the warehouse settings for the locations. Only Bin Mandatory, Default Bin Selection and Base Calendar Code are allowed with Rentals.”

As items linked to rental units may be on contracts, either awaiting shipment or out on rent, the recommendation is to disable the disallowed fields on the Warehouse tab on the Locations that did have Allow Rentals enabled. Then re-enable the Allow Rentals. Otherwise the rentals will not be able to be shipped, or, if out on rent will not be able to be returned. Then create new locations for sales/purchases that do require the fields be enabled, then transfer items from the initial locations to the new locations as needed.

Should your organization have had a customization done to enable the use of the other fields on the Location card, Warehouse with rentals, then it is imperative that you contact our help desk at [+1 \(855\) 411-1261](tel:+18554111261) or create a support ticket by emailing support.opendoorerp.com, prior to upgrading from ODT Rentals 365 Release 4.1 to Release 5.0.

What's New

- **When the first time Invoice is selected on a Rental Contract, the following pop-up will occur.**



The external service enables Open Door Technology to analyze the types of usage, and the processing performance of the ODT Rentals App. This information aids Open Door Technology in improving, and enhancing the ODT Rentals App.

- Allow Always – The default, and preferred selection, will enable the analysis of the types of usage, and processing performance on a continuing basis.
- Allow Once – If selected, the data on the type of usage and processing performance will be available for Open Door Technology to analyze for this one transaction. The pop-up will occur the next time a user posts an Invoice from a rental contract.
- Block Always – If selected, then no data on the types of usage, and processing performance will be available for Open Door Technology to analyze.
- Block Once – If selected, then no data on the type of usage, and processing performance will be available for Open Door Technology to analyze for only this one time.

NOTE: Should Block Always or Block Once be selected, then some functionality may not work as expected.

- **Rental Sales Kits have been added to Rental Units and Rental Packages.**
Rental Sales Kits allow the user to group suggested or required product, or notes to accompany the rental unit. The kits can be created on a unit, unit group or a rental package. The Rental Sales Kits can include Inventory Items, Fixed Assets, Resources and Item Charges, that commonly accompany the rental. In addition, Standard Text Codes, or description comments, can be included in the kit. The Rental Kit records default onto the Rental Quote or Contract Sales Lines, and can be modified or deleted to match the customer requirements.
- **A Rental Inventory Availability list with filtering capability has been added.**
When using Locations with inventory Items, the Rental Inventory Availability list will display the items and the Rental Unit the items are linked to. The item quantity available for rent in rental locations will be displayed, as of the Users' Work Date. The quantity displayed does not include the quantity in the location specified in Rental Management Setup - Inventory Rentals Location field. The list provides the ability to filter by Rental Location, Rental Categories and Rental Attributes. Menu options are provided for look-up to either the Item or the Rental Unit. **NOTE:** The Rental Inventory Availability list is not for use, when locations are not used with inventory items.
- **A Unit Availability Matrix has been added as a link on the Group Availability Matrix**

The Unit Availability Matrix provides a listing of the availability of the units assigned to the group selected on the Group Availability Matrix. The Unit Availability matrix provides filtering by date, location, category and attributes.

- **The capability to return to Rental Units to a different location or a temporary location and a fixed asset transfer journal have been added.**

A FA Transfer Journal has been added for transferring both the rental unit and linked fixed asset from one rental location to a different rental location or temporary rental location. Only Rental Units which do not allow overbooking can be returned to a different or temporary rental location. In addition, when in Rental Packages, all the unit components on the rental lines do not allow overbooking, then all the components in the package can be returned to same different or temporary location. When the rental unit is linked to an inventory item, when the unit is returned to a different or temporary location, then the item will be transferred to the location the unit was returned to. When the unit is linked to a Fixed Asset, then the FA Transfer Journal is created and posted, which updates the Fixed Asset, Rental Location field.
- **Periodic Usage and Standby Charges pricing functionality has been enhanced to provide the ability to enter pricing and/or override the Periodic Usage and Standby Charge prices on the rental lines.**

The Periodic Usage and Standby Charge pricing has been enhanced to allow for the entry of pricing directly on the rental lines. The Rental Unit card must have the Periodic Usage Enabled field activated, in order to enter the applicable Periodic Usage Price and Standby Price on the rental lines. The Periodic Usage and Standby Charge price fields are available to add to the rental lines using Personalize.
- **Metered Usage pricing functionality has been enhanced with the following modifications and features.**
 - **Metered Usage price amounts can be modified on quote and contract rental lines.**

Metered Usage pricing setup on Rental Price cards must still be configured, however, the metered usage price fields are available to add to the rentals lines, and the prices can be modified. Metered Usage Level Limit fields are available to be added to the rental lines, however, are not editable.
 - **Metered Usage processing has been enhanced with a new field, Billable Metered Usage Qty. available to be added to the rental lines, which will now be used for billing purposes, rather than Metered Usage Qty. field.**

The quantity initially defaults from the Metered Usage Quantity is entered or calculated when a Current Meter Reading is entered and can be overridden. The Billable Metered Usage Quantity will be used for the generating of the Rental Amount Lines, which are used for billing customers. The Metered Usage Quantity is now only used for tracking the usage for informational or maintenance purposes.
- **The Rental Packages have been enhanced with the following enhancement and modification.**
 - **Metered Usage pricing has been added to the package price card to enabling the billing of metered usage at the package level.**

The Rental Package card has had the Usage tab added, which contains the same metered usage fields as on rental unit cards and must be configured to enable the entry of metered usage on the rental lines.

In addition, the tab contains the field, Copy Package Metered Usage to Lines, which is used to specify whether metered usage entered on the package rental line, should be copied to rental unit(s) within the package with the same usage unit of measure. The rental price card for rental packages has been modified to include the Metered Usage tab for the configuration of metered usage pricing. The configuration of the price card for metered usage is mandatory, in order to bill metered usage at the rental package level.

- **The Rental Package Lines have been modified with the addition of the field, Do Not Print, which provides the capability to specify that a rental package line is not to print on rental documents.**

Should the Rental Package Lines have a record with the Type, Rental Group, and the Do Not Print field is checked, then the group and the child units will not print on the rental documents. A field, No Print, has been made available to add to the Rental Lines of the rental quote and contract using Personalize. The field, when added to the lines, cannot be edited.

- **The Global Dimensions and the 8 Shortcut Dimension fields have been added to the rental and sales lines on Rental Quotes and Contracts, both open and completed.**

The global dimensions are displayed by default, and the shortcut dimensions are available to add using Personalize. Dimensions added or values modified flow through to the applicable Sales Invoice lines.

- **Rental Units linked to Items has been enhanced to include Serialized Items.**

The Item Tracking Code card has been modified to include a field called SN Rental Tracking. The Rental Quote and Rental Contract have been enhanced to include the menu option of Item Tracking Entries on both the Rental Lines and the Sales Lines. The Item Tracking Entries are to be populated in a similar manner as Sales Lines on a Sales Order. When entered for the Rental Lines, the tracking entries flow through to the Transfer Order, and update the inventory on the posting of the rental shipment and the rental returns.

- **The Rental Quote and Contract have been enhanced to include the renting of Rental Units linked to Items that are located in Bins, which updates the bin contents and inventory on the item when the unit is shipped and returned. The Sales Lines on the rental documents have been enhanced to enable the sale of items from bins as well.**

The Bin Code can be added to the Rental and Sales Lines on the Rental Quote and Contract using Personalize. On the Rental Lines a Return Bin Code field is also available to add, providing the ability to return the item to a different Bin than was shipped from.

- **The Rental Attachments feature has been enhanced.**

An informational fact box is displayed on the rental unit, rental quote and contract, which is similar to what is on the item, sales quotes and orders. The fact box contains the Attachments and Notes by default. The Links must be added using Personalize. For Rental Units, the Notes and Links are available from the list fact box. From the Rental Unit card the fact box contains the Notes, Links and Attachments.

- **The Bulk Returns option has been enhanced to incorporate the return to different or temporary location. The Bulk Returns option has been added to the rental lines Functions menu option and functions the same as when using the Bulk Returns from the To Return list.**

- **The Create Sub Rental Purchase Order function has been enhanced to have rental information flow to the Purchase Order and is available on all purchasing document.**
A field, ODT includes Sub Rental, has been added to the header of all purchasing documents. The ODT Rental Contract No. and ODT Rental Contract Line No. fields, are available to be added to the lines on all purchasing documents using Personalize. When running Create Sub Rental Purchase Order these fields are automatically populated on the line(s) of the Purchase Order(s) created.
- **The field, Standby Revenue, has been added to the Rental Unit Statistics on Rental Units linked to Fixed Assets, which displays the Standby Revenue amount.**
- **The Rental Contract invoicing functionality has been modified so that the Gen. Product Posting Group flows through to the Sales Invoice lines from the rental lines.**
- **The Invoicing Details tab, Currency Code field has been modified to be editable prior to the entry of any rental lines or sales lines on the Rental Quote and Rental Contract.**
On entry of rental lines or sales lines, the price and amount fields are automatically converted to display the amounts in the currency that is on the Invoicing Details tab, Currency Code field and flow through to the Sales Invoices.

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

- **A Rental Return Date can be entered that is earlier than the most recent Metered Usage Tracking Entry on the contract.**
- **A Rental Return Date can be entered that is earlier than the most recent entry in the Calendar Entries on the contract.**
- **The Periodic Usage Entries cannot be opened from the Completed Rental Contract.**
- **When a Unit linked to Item has Dimensions added after TO created are not updating the TO.**
- **The Proforma Invoice is printing the amount in Amount Exempt from Sales Tax in the footer, when should be printing in the Amount Subject to Sales Tax.**
- **On Rental Contract rental lines the child line unit no. of a group can be cleared after the unit has been shipped and after it has been returned.**
- **The Rental Amount Lines for Metered Usage are not being correctly generated, when using a rental term with an Invoicing Type of End.**
- **When renumbering a rental unit that has Metered Usage Tracking entries, the tracking entries are not being renumbered.**
- **The Damage Waiver % when includes usage is used with rental terms having an Invoicing Type of Start or Periodic Start, with Periodic Usage, the final rental period is not calculating the Damage Waiver fee for the usage.**

- **On entry of a rental term with Optimize is enabled and there is no default rental term on the rental unit or a rental term is not entered on the header of the rental document, the rental prices are not defaulting to the rental line.**
- **If a Rental Package with a Rental Unit linked to an Item, is deleted on a rental contract from the rental lines or the contract is deleted, the Transfer Order for the item is not deleted.**
- **When a Rental Unit that has allow overbooking enabled, with a rental price card that has Damage Waiver, Percent, is entered on the rental lines with a Rental Quantity greater than one, then the Rental Amount Line(s) for Damage Waiver are not calculating the correct amounts.**
- **On the Rental Invoicing Worksheet that has a record with an error of, Zero Usage is not allowed and the usage is entered on the contract and validate is ran the error message is not being cleared.**

Known Issues

- When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.
- 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.
- On a Corrective Rental Credit Memo users are able to change the G/L Account No. and should not be able to.
- When on a Rental Quote, Additional Notes linked to a rental unit are deleted, when run Make Contract the additional notes are re-added to the rental unit on the rental line.
- When a rental group is on a contract with units, or groups after it and then the group Rental Quantity is increased, the Posted Rental Invoice does not print the additional unit(s) with the other child units of the group.

UPCOMING Releases – Planned Modifications and New Features

- **Add Shipping feature on rental contract lines & To Ship list page, including:**
 - Pick-up Location & address with options to select internal location, vendor location or manually enter the address to picked up the unit.
 - Ship-to Location & address for customer location or manually entering address.
- **Add Return feature on rental contract lines & To Return list page, including:**
 - Pick-up Location & address with options to select customer location or manually enter the address to picked up the unit to be returned.
 - Return-to Location & address with options to select internal location, vendor location or manually enter the address to return the unit to.
- **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**

- **Recurring Sub-Rental PO feature**
- **Undo Return feature**
- **Enhancement of the Group Availability Matrix to have Category and Attribute filters in the Options**
- **Metered Usage enhancement for Optimization and/or Proration of Metered Usage Allowance Limits**
- **Enhance the To Ship and To Return lists to add the ability to enter Metered Usage Qty. or Current Meter Reading**