ODT Rentals 365

North America
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Open Door Technology
200, 7710 5 Street SE
Calgary, Alberta T2H 2L9
877.777.7764

www.opendoorerp.com

What's New

- **The capability to summarize Rental Amount Lines for Day terms has been added.**
  An option field, Summarize Rental Lines, has been added to the Rental Term card which can be enabled. The ability to enable the field is restricted to a term that has a Period Code of Day and does not have a Link Term or any of the Alt term code fields populated. When enabled then the Rental Amount Lines on Rental Quote and Contract will be summarized to a single line on entry of the Rental Term on the line based on the Rental Start Date and Rental Return Date. When the day term is Periodic End or Periodic Start and invoicing for only a portion of the contract the Rental Amount Line will be split to display the invoiced dates as one line and the remaining dates not invoiced as a second line.

- **A customized calendar has been added, which provides the ability to specify non-billable days and days that a standby price is to be billed to the customer.**
  The ability to specify days as non-billable is available to use for all rental terms. The ability to specify days that are to have a standby price billed to a customer is limited to when the Rental Term on the line is a day term. The Standby Price to be used must be entered on the Rental Line. When days are specified as non-billable the Rental Amount Lines will be modified to not include the days that are not being billed when terms are day terms. When the term has the Prorate field set to All periods, then the Rental Amount Line related to the period with less than the full number of days in the period will have the Extended Quantity calculated to display and bill based on the prorated number of days. NOTE: Optimization is not compatible with this feature, therefore is not to be used with the feature.

- **The capability to copy an open or completed Rental Contract has been added to the Rental Quote and Rental Contract.**
  The Copy Document feature includes options to specify the Rental Start Date and Rental Return Date, Include the Header and Recalculate Lines. Validation is included for the rental dates and will prevent the copying if the dates overlap dates when copying an open contract that has units out on rent that do not allow overbooking. The Include Header is only to be used when the new contract will have the same customer and will copy all comments, links, notes and attachments from the contract copied to the new contract. The Recalculate Lines when enabled will in essence re-enter the rental and sales lines. When Include Header is disabled this option is automatically enabled and cannot be edited to ensure that the prices, dimensions and attachments default from the customer, units and sales line types. When the Include Header is enabled, users can disable the Recalculate Lines, which means that the rental and sales lines will be copied from the contract being copied, including prices, dimensions and attachments. Validation is included for the availability of the units when not linked and when linked and the sales lines will validate the availability of items as per standard sales lines.

- **A menu option, Rental Prices has been added to the Rental Quote and Rental Contract, Rental Lines, Line menu option to look-up Rental Prices for the selected unit line.**

- **The copy Rental Unit feature has been modified to provide the ability to override the New Rental Unit No. field.**
  When copying a Rental Unit, on the Copy Rental Unit list page the New Rental Unit No. can be modified to specify a different Rental Unit No. than the number that automatically populates the field.

- **The Fixed Asset Template page has been modified to have both the FA Location Code and Rental Location Code so that both fields can be populated when copying a Rental Unit and automatically creating a Fixed Asset.**

- **The ability to re-open a Completed Rental Contract has been added to the Completed Rental Contract. A menu option, Re-open Rental Contract has been added to the Action menu option.** On the re-opened contract additional Metered Usage and Periodic Usage can be added and invoiced. Additional rental or sale lines can be added and invoice. NOTE: The contract cannot be extended as the rental units are not on rent.

- **The capability to enter and sell Fixed Assets on the Sales Lines on the Rental Quote and Rental Contract has been added.** The fields related to selling a Fixed Asset have been added as available fields to add to the Rental Lines on the quote and contract. When a Fixed Asset that is linked to a Rental Unit is added to the Sales Lines on the quote or contract, the entry will be disallowed if the Rental Unit is out on rent. If the Rental Unit is on a quote or contract, but not shipped, a message occurs advising that the Rental Unit has been deactivated. The FA Transfer Journal has been modified to disallow the entry of a Fixed Asset, when the Fixed Asset has the Inactive or Blocked fields enabled and when the Rental Unit has the Inactive field enabled.

- **The To Return List has been modified to provide the Partial Return Date field as an available field to allow the users to modify the date from the To Return list.**

- **The To Ship List has been modified to allow the modification to the Bin Code field when added using Personalize, display Customer Pickup by default and the Rental Inventory Avail. Has been added to the Rental menu options.**

- **The Tax Area Code field has been added to the data set for rental reports for use when rental reports are modified.**

- **The Rental Quote and Contract have been modified to include the Bill-to Contact No. on the Invoice Details tab and to print on rental documents.**

- **The Rental Attachments fact box has been enhanced to include Rental Line and Sales Line Attachments. Sales Lines have been enhanced with the menu option to add attachments to the lines.**

- **When there are multiple No. Series for Rental Quotes and Rental Contracts with the relationships configured, the documents include the look-up to select the No. Series to be used when creating new document.**

- **The Print menu option has been removed from the Posted FA Transfer Shipment and Posted FA Transfer Receipt lists as there currently are no reports for these documents.**

- **On the Rental Contract, Rental Lines the Required Shipping Date has been modified to reflect the date related to the user's time zone.**

- **The entry of Rental Units on the Rental Lines has been modified to disallow the entry when the Rental Units are linked to master records that have the Inactive or Blocked fields enabled.**

- **The FA Transfer Journal has been modified to disallow the entry of a Fixed Asset linked to a Rental Unit, when the Fixed Asset has the Inactive or Blocked fields enabled.**

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

- **When setting up a new unit that is to be assigned to a group, a user can enable Allow Overbooking before selecting group and the Allow Overbooking field remains enabled when should be automatically disabled.**

- **When a Rental Unit is entered on a Rental Line and the unit does not have a price card for the defaulted or selected Rental Term the pop-up message advising there is no price card is missing.**

- **When partial shipments or partial returns are processed, the Additional Notes are not carried forward to the new rental line created.**

- **On the Rental Invoicing Worksheet when the select all field is selected and then Validate Lines is selected then an error occurs stating "No lines selected." This error should not be occurring.**

- **On a Corrective Rental Credit Memo users are able to change the G/L Account No. and should not be able to**.

- **When a rental unit that has no transactions, but has Additional Notes is deleted, the Additional Notes record is not deleted.**

- **When on a Rental Quote, Rental Line, the defaulted Additional Notes are deleted, then run Make Contract, the Additional Notes are recreated on the Rental Contract rental lines.**

- **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.**

- **When on a Rental Line with no Rental Return Date, the Billing End Date is entered, then the Rental Billing End Time and Rental Billing End Date-Time fields are populated with an incorrect time.**

- **When using the Configuration Packages to import Rental Sales Kit records, an error occurs due to the length of the Description field only allowing 50 characters on import when should allow for 250 characters.**

- **On the Rental Quote and Rental Contract, Sales Lines the Tax Area Code is not available to add to the Sales Lines.**

- **When using Rental Sales Kits and there are greater than one item in the kit and if there are not enough available items on more than one item the inventory availability message only displays for the last item.**

- **On Rental Unit Group cards the Allow Overbooking field cannot be enabled when the card has Metered Usage Enabled or Periodic Usage Enabled fields activated.**

- **On rental documents, Sales Lines, after the entry of an item on the line, the Type field can be changed on the line.**

- **When running Create Sub Line on a child line of a group on the rental lines and the Link Type is Fixed Asset, an error occurs and the Rental Unit No. field is not populated with the sub-rental unit.**

- **When Location Mandatory is not enabled on Rental Management Setup and the Rental Unit on the line is linked to a serialized item the Transfer Order does not post.**

- **From the Rental Invoicing Worksheet when a contract with a rental package is extended, the prices on the component lines are being reset to the unit prices when should remain as the calculated allocation price.**

- **When creating a new Price Card on a unit or group, only the General and Metered Usage tabs are displayed. Users have to close and re-open the price card for the other tabs to be displayed.**

- **When a Rental Unit is returned to a temporary location, the Rental Temporary Location field is not populated on the unit. If the unit is linked to a Fixed Asset the Rental Temporary Location is as well not populated.**

- **When processing partial returns when the Rental Unit is linked to an Item stored in Bins, the new line created does not have the Return Bin Code field populated with the code in the Bin Code field. And if the user does not populate the Return Bin Code field the Item is returned to the Default Bin rather than the bin the item was shipped from.**

Known Issues

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

- The Unit Avail. Matrix, Reserved Qty. field is not updating when the selected unit line has reservation entry.

- When using a Periodic End Day rental term with Summarize Rental Lines enabled, if 1 day flagged as Use Standby Price and then 2 days flagged as Non Billable the Ending Date-Time on the Rental Amount Line for the line with the Standby Price contains the date of the following non-billable day. As a result of the Ending Date-Time having the incorrect date, the Billing Date is set to the non-billable day's date.

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.

- **Rental Accruals and Deferrals**

- **Deposit capability**

- **Putting a Rental on Hold**

- **Modification to the Rental Unit card adding a Suggested Sale Price field**

- **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**