



ODT Rentals 365

North America

Release Notes V6.1.0.0

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What's New

- **End of Month Billing and First of Month Billing**
The End of Month Billing feature provides the ability for rental companies to calculate future invoices at the end of each calendar month, regardless of the original day of the month when the equipment was rented.
The First of Month Billing feature provides the ability for rental companies to have future billings calculated at the first of every calendar month, regardless of the original day of the month when the equipment was rented
- **Cycle Billing**
The Cycle Billing feature provides the ability for rental companies to have a standard billing cycle date used for a cut-off on a rental contract, so that any future equipment added to the contract will be billed to the same cut-off date as the first unit(s) rented. Alternatively the Billing Cycle feature provides the ability to specify a specific date between 1 and 28 in a month on which invoicing is to occur each month.
- **Auto Credit Memos for early return of rentals billed in advance**
The Auto Credit Memo functionality provides the ability to automatically create and, if desired, post a credit memo when a rental, which has already been billed to the customer, is returned early. The Auto Credit Memo functionality with Auto Post and without Auto Post, is applicable for only Rental Terms which have an Invoicing Type of Start or Periodic Start.
- **Posted Rental Credit Memo**
A Rental Credit Memo report has been added to the Posted Sales Credit Memo document and Rental Report Selections. The Rental Credit Memo can be printed, send or emailed. The menu options The Rental Credit Memo format prints the credit information similar to the Rental Invoice.
- **Rental Rapid Returns**
The Rental Paid Return feature provides the ability to quickly return rental units per location being returned to by either entering a Rental Unit No. or a barcode, or scan a barcode on the unit and process the return.
- **Certificate of Insurance Tracking**
The Certificate of Insurance tracking provides the ability for rental companies to ensure their customers have valid insurance certificates to cover the equipment they rent. The feature includes the ability to attach a picture of the certificate or attach a pdf file of the certificate. In addition, a fact box has been added to the Customer card, the rental quotes and contract, thus providing visibility as to the expiry date, coverage and deductible of the most recent certificate.
- **The Pick List has been enhanced and added to the Rental Contract. The Pick list from the Rental Contract and Shipments Due Today include options added for specifying whether Weights, Serial Nos., Contract Comments and Additional Notes are to print on the pick list. The Pick List from the To Ship list contains the options for specifying whether Weights, Serial Nos. and Additional Notes are to print on the pick list.**

- **The Rental Contract Comments feature has been enhanced to include the ability to specify whether the comments are to print on the Pick List.**
- **Additional Notes have been enhanced to include the ability to specify whether the notes are to print on the Pick List.**
- **Copy Rental Unit has been modified and enhanced. The enhancement allows for overriding the Rental Unit No. suggested in the copy process. The modification is related to when copying a Rental Unit Group, the group indentation and the settings on the Allow Overbooking and Availability Warning fields are no longer copied to the new Rental Units.**
- **Addition of the Payment Method, Payment Terms, Package Tracking No. and Tax Liable fields to the Rental Quote and Rental Contract.**
- **Addition of options on Rental Management Setup for suppressing confirmation pop-up messages related to partial returns, no price cards setup, and early returns when the return date is earlier than latest invoice date.**
- **The Completed Rental Contract has been modified to include the Job integration related fields that are displayed on open Rental Contracts.**
- **The Copy Rental Document feature has been enhanced to include the ability to copy Rental Quotes.**
- **The Post and Send feature has been added to the Rental Invoicing Worksheet.**
- **The rental documents have been modified to print the Shipping Agent and Shipping Method when specified on the Rental Quote and Rental Contract.**
- **On the Sales Order Processor Profile, the Rental FA Transfer Journal menu option has been added to the Rental Management menu.**
- **The printing of Serial Nos. has been added to the Posted Rental Delivery and Posted Rental Return documents.**
- **On the Job Planning Lines Ready for Billing the menu option Append to Contract is now displayed on the menu bar.**

Issues Resolved

- **Swapping rental units when the term has an invoicing type of periodic start and the rental period is greater than a day term (week, month), after an invoice has been posted, and then a swap is ran with a date that is during the period that was invoiced has an issue. The rental amount lines on the new rental unit are incorrect. This issue only occurs when the rental pricing includes periodic usage and standby charges.**
- **When a Fixed Asset is linked to a Rental Unit and either on the unit or asset the Rental Location is changed from a temporary Location, the Temporary Location field is not cleared on the asset card.**

On an asset card when the Rental Location is changed to a temporary location the Temporary Location field cannot be edited.

- The Rental Inventory Availability, Location Filter field does not display the entered or selected Location. The setting can only be cleared by using the Filter option and clearing the Location filter. The Rental Avail. Inventory quantity does not include the quantity that has been returned when the contract has been completed and is closed.
- When a customer does not have a Ship-to-Code, and the rental and sales lines are populated prior to entering the Ship-to-Code on the header, then errors occur. Selecting revert the changes does not clear the Ship-to Code field, and if close the contract, then the same errors occurs. If clear the Ship-to-Code field and close the contract, then the message, "There are unsaved changes on the page. Do you want to discard these changes?" occurs.
- When the Rental Return Date on the rental line is blank, and after adding the Rental Billing End Date to the lines and enter a date in the field, an error occurs when try to clear the date.
- When rental contract sales lines are created from a Job by using the Append to Contract and the lines are deleted on the contract and not invoiced, the Linked to Doc. No and Line No not cleared from the Job Planning Lines.
- When on a Job the currency option of Invoice Currency Code is selected, then the amounts when append to contract is ran are not converted on the rental contract sales lines.
- When an item is entered on the Sales Lines, the unit price is not populated or is populated with an incorrect price, when special prices do not exist on the item. If item unit price is overridden the price does not flow through to the sales invoice. The item card unit price is updating the sales line rather than the unit price from the rental contract sales line.
- The Document No. does not increment on the ledger entries generated by the Inventory Transfer to FA.
- Expand & Collapse of Rental Lines displays the lines incorrectly if the Rental lines are collapsed and then add a Sales Line.
- When on General Ledger Setup the Amount Rounding Precision is set to a different number than the default number, then the accrual journal fails to generate the accrual records.
- When on rental lines the look-up is used in Rental Unit No. field and select a unit, group or package and then try to change the term an error message occurs.
- When undo shipment on rental packages the component rental lines are duplicated.
- The rental Line description comments are not flowing through to the sales invoice.
- When the Tax Liable field is overridden on the rental contract, the setting is not flowing through to the sales invoice.

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 a reservation entry.
- When on the Unit Avail. Matrix the user has set an Attribute with Value filter and closed the Filter Rentals by Attribute page and the lines have been filtered, and then go back into the Filter Rentals by Attribute page and clear the Value field and close page. The Attribute Filter is blank, but lines are not updated as the lines are still filtered by the attribute and attribute value. When go back into the Filter Rentals by Attribute page there are no records displayed. In order to get the lines to display without the filters, the user must add back the Attribute and Value in the Filter Rentals by Attribute page, select ok and then delete the data in the Attribute Filter field in the matrix options.
- On the Rental Contract, if all the rental lines are deleted, then on the General tab the Contract Total and Amount Outstanding fields are not cleared.

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.
- **Bill Until Date invoicing**
- **Transfer Rental Contract to New Contract for the same Customer**
- **Enhance Rental Packages to enable the return of component rental lines while maintaining package price allocation to all units**
- **Multiple meters for Rental Units**
- **Avalara tax integration**
- **Deposit capability**
- **Putting a Rental on Hold**
- **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**