



# ODT Rentals 365

North America

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## What's New

- **Bill Until Date**  
The Bill Until Date functionality provides the ability to bill a customer for past and future rental periods, while specifying a Posting Date to which the Ledger Entries are to be posted.
- **Advanced Proforma**  
The Advanced Proforma features provides the ability to create an invoice and lock the current contract so that it cannot be modified until the Advanced Proforma Invoice is approved by the Customer and is posted. The Advanced Proforma Invoice has a unique numbering consisting of the contract number plus a suffix, (example: RC00001-001) which increments for each advanced proforma created when related to the contract.
- **Transferring Rental Contracts**  
The Transfer Contract feature provides the ability to automatically create a new contract for the same or a different Customer and transfer some or all rental lines on a Rental Contract to the new contract. The Transfer Worksheet provides the options to specify what the Rental End Billing Date and Rental Return Date are to be used when returning the units on the originating contract and the Rental Start Date and Rental Return Date to be used on the new contact. In addition, an option is provided which when enabled will enforce continuous billing from the originating contract. The worksheet as well provides the ability to specify a different Ship-to Address and/or Bill-to Customer to be used to when creating the new contract. When the transfer is processed, the selected rental lines to transfer that are out on rent will be returned on the original contract and shipped on the new contract. Should selected lines include rental lines that were returned on the originating contract, these lines will be transferred as returned on the new contract.
- **Rental Packages feature enhanced to allow the return of package components separately.**
- **Rental Rapid Returns Enhanced**  
The Rental Rapid Return barcode scanning feature has been enhanced to include the functionality for returning rental package components as a whole or individually.
- **Cycle Billing feature has been enhanced to include Billing Cycle Tolerance Days.**  
The tolerance days provides the ability to specify the minimum number of days that must be met for the rental billing to be included on an invoice.
- **The Business Manager and Sales Order Processor profiles have been modified to display the Group Availability Matrix and Rental Inventory Availability menu options on the interface when opened.**
- **The Rental Category Details and Attachment fact box tabs have been enhanced.**  
The Details tab includes the Rental Category Picture and the Attachments- Documents fact boxes. The Attachments tab includes the Notes fact box, and the Link fact box can be added using Personalize.
- **A new field has been added to the Rental Lines, # of Periods, which will calculate the Rental Return Date based on the number entered in the # of periods field.**

- **The ODT Rentals Permissions have been converted to the new format for Microsoft Version 18.**
- **The View Rental Calendar menu option has been added to the Rental Quote, Rental lines, Lines menu options.**
- **Periodic Usage and Standby Charge rental line pricing has been enhanced to include the Standby Billing field, which provides the flexibility for users to chose whether or not Standby Charges can be selected on the Periodic Usage Entries.**
- **The processing of multiple partial returns with Auto Credit Memo has been modified so that the Credit Memos lines field, Rental Contract Line No., contains the rental line no. that the partial return occurs on, and displays the credit memo on the Rental Value Entries for the applicable line.**

## Issues Resolved

- The Unit Avail. Matrix, Reserved Qty. field is not updating when the selected unit line has a reservation entry.
- Updates to Billing Cycle Type on Rental Man. Setup and Customer Card are updating open quotes & contracts when should not be.
- The Rental Unit Utilization and Rental Unit Sales Report, Date Filter, does not filter the sales amounts on the report.
- When Auto Credit Memo is enabled on Rental Management Setup and process a partial return that is within a week other than the last week for a First of Month Billing Cycle with a rental term that has a rental period of Week and an Invoicing Period of Month, the Credit Memo is not created.
- The Gen. Bus. Posting Group & Gen. Prod. Posting Group do not flow to Sales Invoice from header or lines on Rental Contract.
- When creating a Rental Category, users can set the Rental Parent Category to be the same as the Code, which freezes the system.
- When Sales & Receivable Setup does not have a different No. Series for the Posted CM, then when an Auto Credit Memo is generated on a contract, the Credit Memo No. is not populated on the Rental Value Entries.
- When using the Billing Cycle Type of Billing Cycle Date and change the Rental Billing Start Date to be different from the Rental Start Date, then the Billing Cycle Date on the Invoice Details tab on the contract is not updated.
- An ODT Rental Event Management codeunit was causing an error to occur when purchasing items with an Item Tracking Code.
- Cannot open the Rental Amount Lines or return units on FCY contract.
- When using the Auto Credit Memo feature, if the invoice is no longer open, then an early return for a Start or Periodic Start term is processed, the Credit Memo cannot be posted as the Applies-To cannot be edited to enable posting of the Credit Memo.

- When a contract is using the Billing Cycle Type of Billing Cycle Date, and after invoicing the first period extending the return date be greater than a full period, the Billing Cycle Date on the Invoice Details tab does not update.
- On a contract that is using the Billing Cycle Type of Billing Cycle Date, when entering the rental lines and the Rental Billing Start Date is changed to be different than Rental Start Date, the Billing Cycle Date is not updated on the Invoice Details tab.
- When a Location filter is set on the Group Availability Matrix and Net Set or Previous Set are selected, then no lines are displayed on the matrix lines. When the Location filter field is cleared on the options tab, the lines are still filtered to the Location that was in the filter field.
- Entry of a Salesperson Code on the header when blank, deletes existing Dimensions on the Rental Quote and Rental Contract header.
- The Dimensions on a Corrective Rental Credit Memo are not flowing through to the Rental Value Entries when the Credit Memo is posted.
- An error is occurring when changing the Rental Return Date on a rental line with a rental group, when on the Group Rental Unit card and Rental Management Setup, the Allow Overbooking field is not enabled. No further rental units or groups can be added to the contract as the same error occurs when select a unit or group.
- Auto Credit Memo returns an error, if a Corrective Rental Credit Memo is run on the last invoice, and then return a unit early within prior invoice period.

## Known Issues

- When copying Rental Units that have Dimensions, the Dimensions are not copied to the new units.
- When printing the Rental Contract, the Contract Total on the General tab on the contract differs from the report total by pennies due to the tax rounding calculation when run the contract report.
- 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

- **Deposit capability**
- **Lot Tracking for Rental Units linked to inventory items.**

- **Assignment of multiple units at once from the rental contract, Rental Unit No. field.**
- **Reconciliation of Rental Quote/Contract quantities worksheet by document.**
- **Modification to the Rental Accruals feature to include the reversal entries on the same journal where the accruals/deferrals are calculated rather than being on the subsequent accounting period journal.**
- **Enhancement to the Billing Cycle Types of End of Month Billing and First of Month Billing when using the Blank Return Date feature.**
- **Dispatch feature**
- **Addition of Customer Portal fields**
- **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.
- **Multiple meters for Rental Units**
- **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**