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1. Getting Started with Rentals

1.1. Rental Management Introduction

1.1.1. Introduction to Rental Management

1.1.1.1. Overview

Open Door Technology Rental Software (Rentals) is a business software solution for rental-focused companies. It provides a fully integrated rental system in one database with real-time data processing. With Rentals you can track, quote and invoice rental fleets in various industries.

The flexibility of ODT Rentals App in Dynamics 365 Business Central allows you to customize the setup of rental terms, rental prices, and rental equipment.

Fully integrated with Dynamics 365 Business Central, the Rental functionality has been added to the Business Manager and Sales Order Processor Role Centers, which provides you with a rental focused interface that works from one database.

Rental Management enables companies to:

- Match customer requirements by offering flexible pricing options, including optimized, pro-rated, hybrid hourly, metered usage, periodic usage with or without standby charges, damage waiver fees, an additional fee, and fixed rental pricing
- Flexible billing options, such as user defined billing, billing in advance or arrears, first of month, end of month and cycle billing
- Rental Approval Workflows
- Electronic Signature capturing directly on Rental documents and Remote E-Signature capturing
- Calculate and post rental revenue accruals and deferrals
- Payment Service integration
- Track Metered Usage for maintenance purposes
- Track Customer Certificates of Insurance
- Rent units or sell items on one rental contract
- Allow for overbooking of units at a global or unit level
- Create rental packages containing rental unit groups, rental units and standard text codes
- Link rental units to fixed assets, items, resources and G/L accounts
- Item Availability updated for items linked to units, including items with Serial No. and Lot No. tracking and items in bins
- Availability Matrixes and Availability Calendars
- Process Quick Rentals from the availability matrixes
- Create Fixed Assets and Rental Units at the same time
- Assign Dimensions and a service status to rental units



ODT Rentals Online Help

- Attach additional notes to rental units or add on the fly on quote or contract for printing on documents
- Attach Rental Sales Kits to rental units and packages, which default to the sales lines on quotes and contracts
- Transfer a Fixed Asset to Inventory
- Transfer Inventory Items to Fixed Assets and create Rental Units
- Customer Certificates of Insurance
- Specify rental line discount percentages on customer cards that default to the rental quote and contract
- Create Rental Quotes and Contracts from a Contact card
- Configure rentals for open ended, indefinite rentals
- Process rental contracts across different time zones
- Transfer Rental Contract , Rental Lines to a new contract
- Print a listing of pick tickets for pending rental shipments by contract or by unit. In addition users can enter the picked units, and process shipments from the To Ship cue
- Print a Proforma Invoice (pre-posting invoice) from contracts and the Rental Invoicing Worksheet
- Create an Advanced Proforma Invoice, locking the contract until customer approval is received and the invoice is posted
- Swap out Rental Units out on rent
- Interaction Logging
- Print Rental Terms and Conditions and attach to e-mails
- Process and track sub contracted rental units
- Batch invoice rental contracts
- Bulk return all units, or selected units, from a contract or the To Return cue to the same or a different location
- Return rental units using Barcode scanning
- Append Job Planning Lines to the Rental Contract Sales Lines, which when the contract is invoiced, updates the Job Planning Lines
- Create a Job including Tasks and Budget type planning lines from a Job specified as a Template Job
- Create a Rental Contract from a Job and on invoicing of the contract post rental and sales line transactions to the Job, creating invoiced Billable type Job Planning Lines
- Calculate rental revenue accrual and deferral amounts for posting to the G/L in a reversing rental accrual journal
- Easily determine whether rental shortages exist on Rental Contracts
- Resolve shortages directly from contracts
- Review customer rental history from the customer card
- Review rental statistics on rental units
- Review a list of Units on Rent from the Customer card.
- Easily determine the outstand amount per contract using the Outstanding Contract Amount report.
- Archive Rental Quotes
- Take pictures on Posted Delivery and Posted Return documents
-

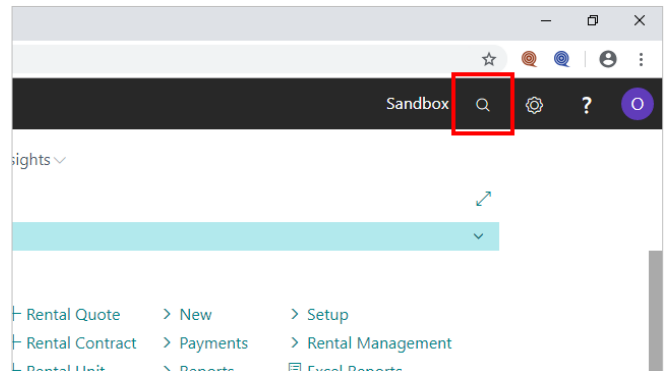
1.1.1.2. How to Modify User Experience

With ODT Rentals, the User Experience on the Company Information card must currently be set to either Essential or Premium.

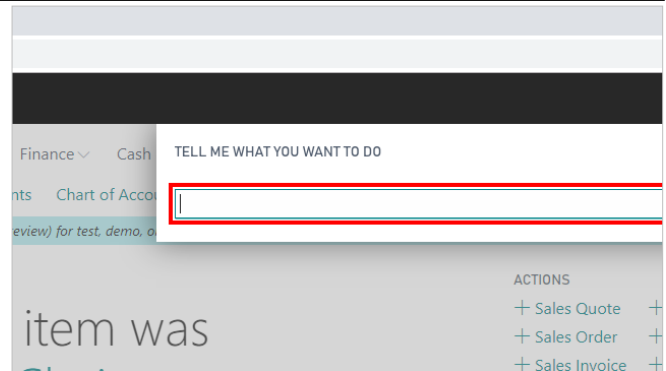
The following steps demonstrate how to change the User Experience setting.

Business Manager Profile

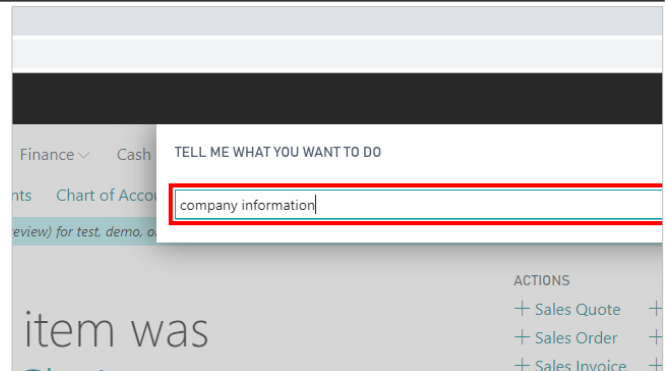
Click on the link



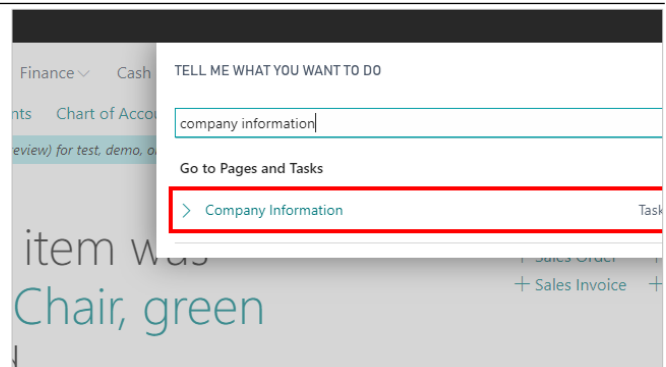
Click on the field **Type to start search:**



Enter the text **company information**.



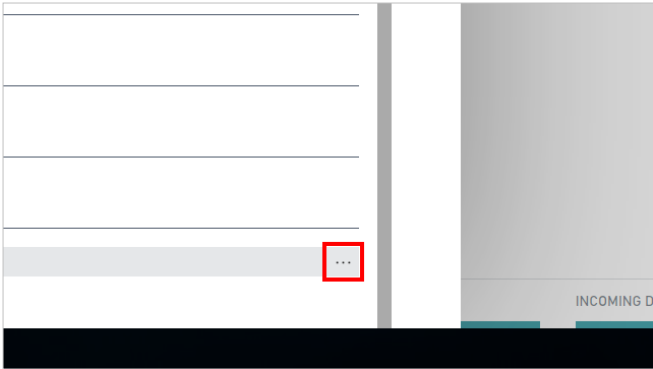
Click on **Company Information**



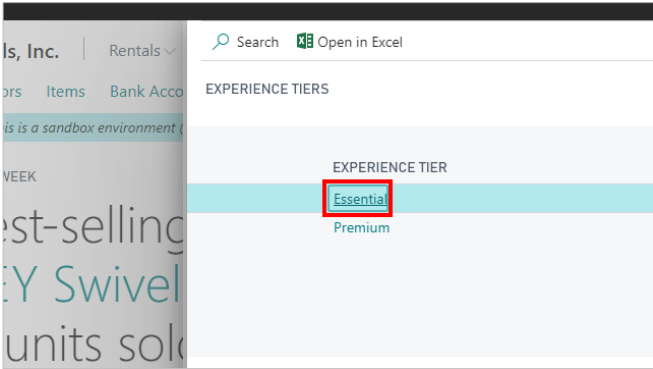
ODT Rentals Online Help

Go to the User Experience tab on the Company Information window.

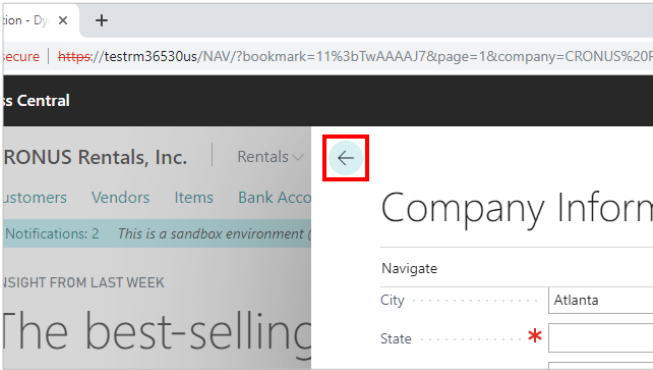
Click on the link AssistEdit on the Experience field



Click on the link in cell **Experience Tier** with the value **Essential**



Click on the back button



To update the connection to display the user interface based on the Essential selection, the system should automatically close and re-open the program, when the Company Information page is closed.

If it does not, then you must log out and re-open the Dynamics 365 Business Central program.

1.1.1.3. Business Manager Profile

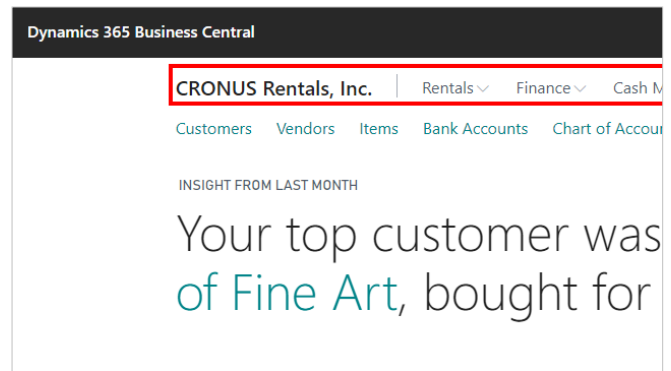
The Business Manager profile contains access to the options to setup Rentals and to process Rentals.

Each of the menu, actions and cue options noted in the following steps are explained in individual help documents, which can be found in the applicable categories in the ODT Rentals Online help.

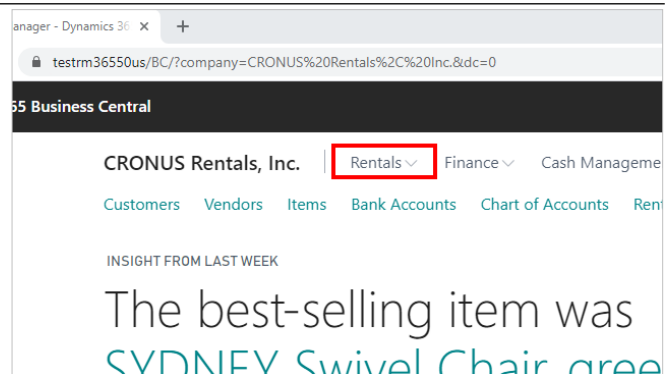


ODT Rentals Online Help

The top menu activities contain a Rentals option, which contains a drop down list of rental options.



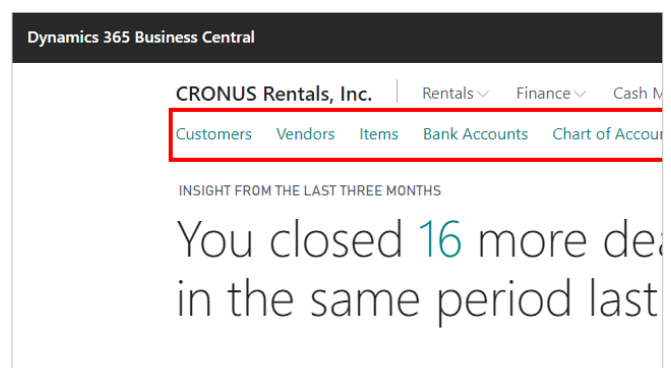
Click on **Rentals**



The Rentals menu item contains the following menu options:

- Rental Quotes and Rental Contracts
- Completed Rental Quotes and Completed Rental Contracts
- Rental Periods, Rental Terms, Rental Units and Rental Packages
- Posted Rental Deliveries, Posted Rental Returns and Posted Rental Rapid Return
- Rental Accrual Registers, Rental Accrual Batched and Rental Accrual Journal
- Group Availability Matrix and Rental Inventory Availability
- Sub Rental Worksheet
- Rental Returns
- Posted FA Transfer Shipments and Posted FA Transfer Receipts
- Posted Rental Invoices
- Rental Registers
- Rental Invoicing Batches and Rental Invoicing Worksheet
- Rental Rapid Return
- Rental FA Transfer Journal Batches and Rental FA Transfer Journal

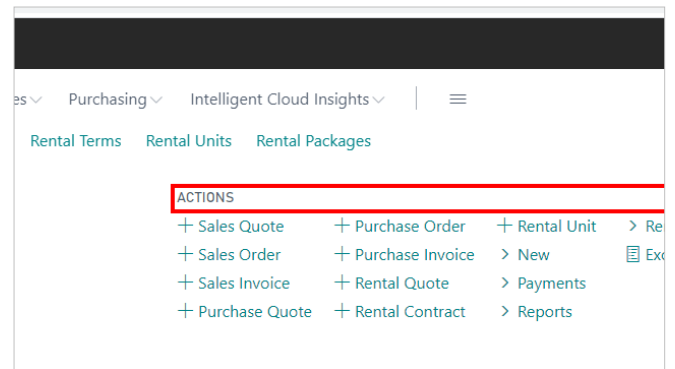
The second menu contains the rental menu options of Rental Periods, Rentals Terms, Rental Units, Rental Packages, Group Avail Matrix and Rental Inventory Avail..



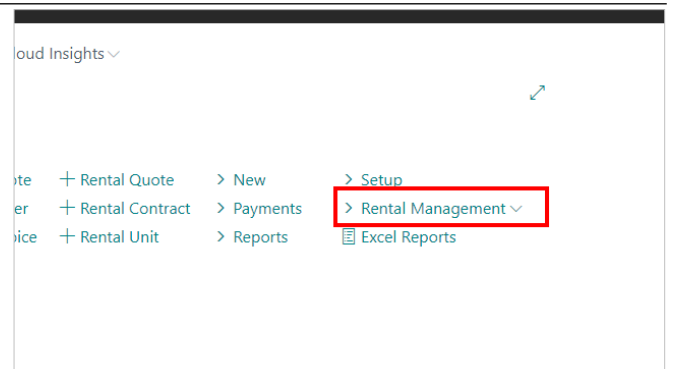
ODT Rentals Online Help

Click on **Actions**

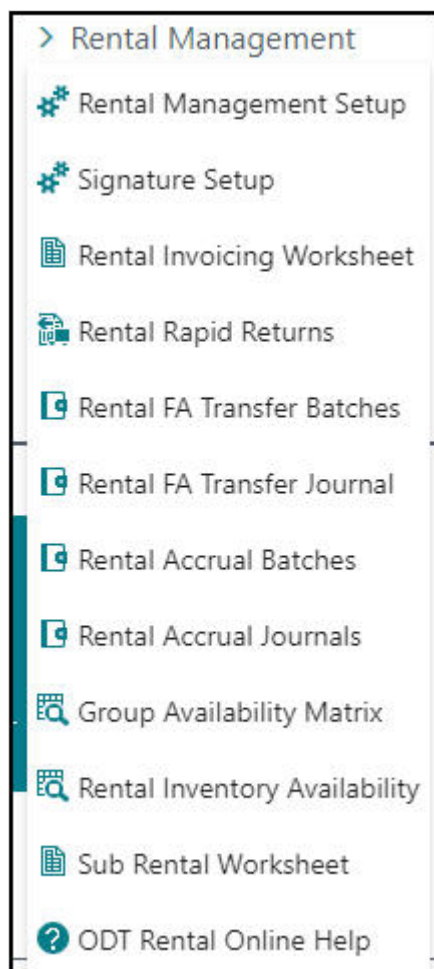
The Actions part contains the options to create a new Rental Quote, Rental Contract or a Rental Unit.



Click on the link **Rental Management**

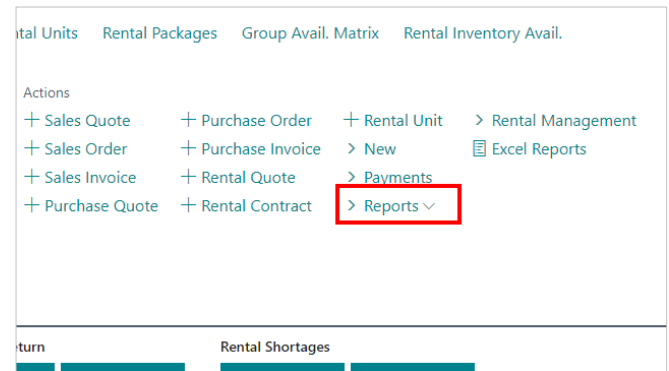


The Rental Management contains the following menu options:



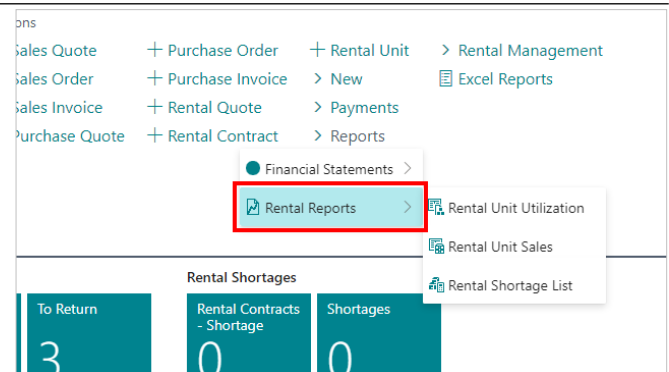
ODT Rentals Online Help

Click on the navigation menu item popup **Reports**



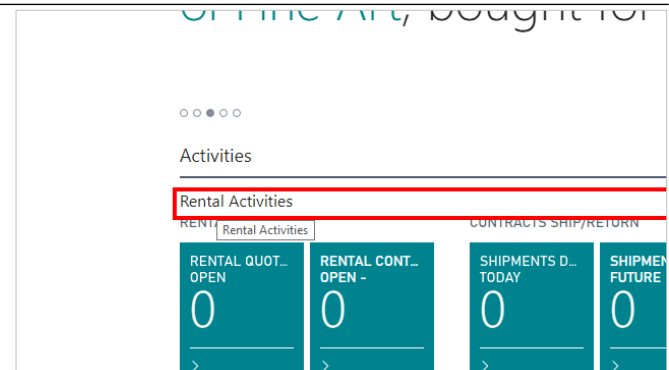
Click on the navigation menu item popup **Rental Reports**

A listing of the rental reports will be displayed.



Click on the label **Rental Activities**

The Activities part in the role center contains a Rental Activities section, which contains the cues for open Rental Quotes and Rental Contracts, and cues for Shipping and Returns by Rental Contract and by Rental Units.

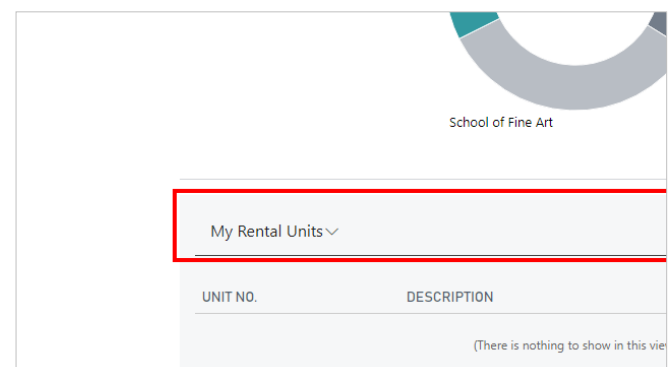


When on Rental Management Setup the field, Shortage Cues Visible is enabled, then the Rental Shortages Cues will be displayed.

To learn about the Rental Shortages Cues, see the ODT Rental Online Help in Processing Rentals, Resolving Rental Shortages.

A list part for Rental Units has been provided in the Role Center to enable users to add Rental Units most used for quick and easy access to those units.

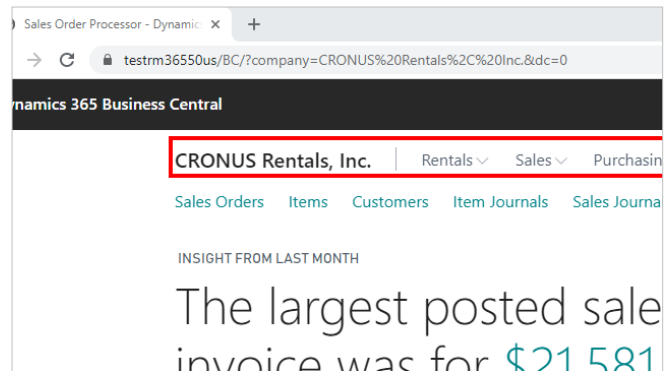
Click on **My Rental Units**



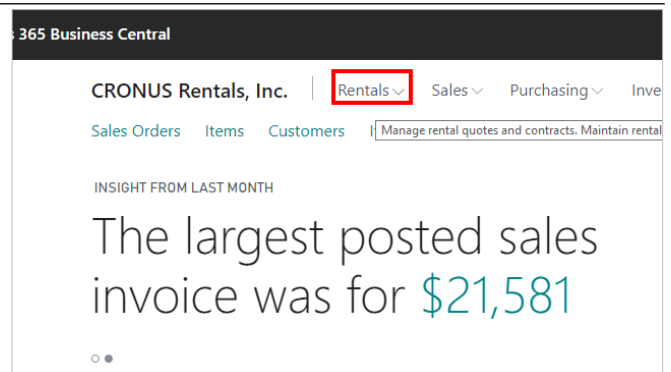
1.1.1.4. Sales Order Processor Profile

Each of the menu, actions and cue options noted in the following steps are explained in individual help documents, which can be found in the applicable categories in the ODT Rentals Online help.

The top command bar contains a Rentals menu option and the Posted Documents contains the posted rental documents.



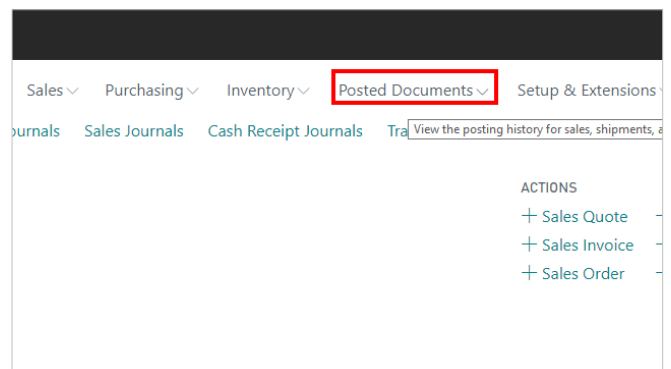
Click on the navigation menu item popup **Rentals**



The Rentals menu item contains menu options for:

- Rental Quotes and Rental Contracts
- Rental Periods and Rental Terms
- Rental Units and Rental Packages
- Rental Registers
- Rental Invoicing Batches and the Rental Invoicing Worksheet
- Rental Rapid Return
- Rental FA Transfer Journal
- Group Availability Matrix and the Rental Inventory Availability
- The Sub Rental Worksheet and the Rental Returns list

Click on the navigation menu item popup **Posted Documents**



The Posted Documents activity button contains the Completed Rentals Quotes, Completed Rental Contracts, Posted Rental Deliveries, Posted Rental Returns, Posted Rental Rapid Return, Posted FA Transfer Shipments, Posted FA Transfer Receipts and Posted Sales Invoices.

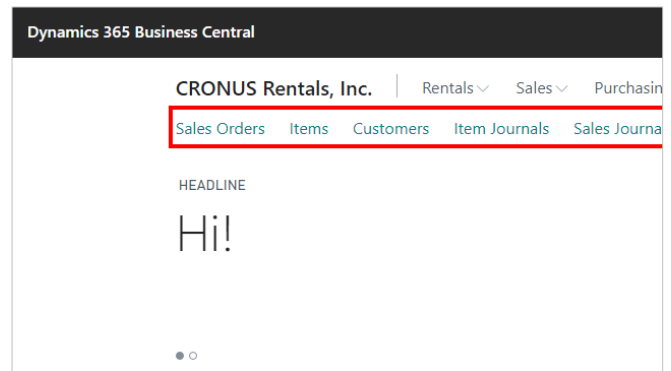
NOTE:

Posted Rental Invoices can be viewed from the Posted Sales Invoices.



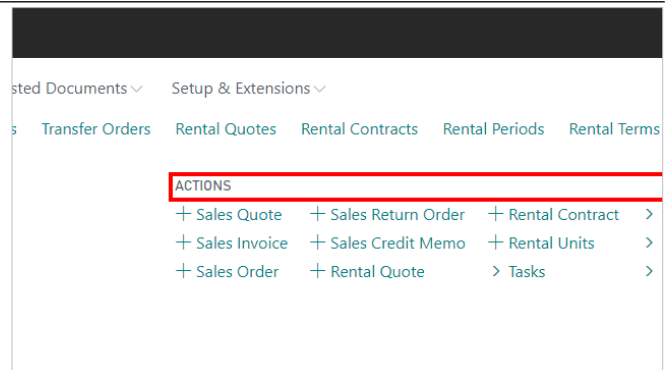
ODT Rentals Online Help

The second menu contains the rental lists for the Rental Quotes, Rental Contracts, Rental Periods, Rental Terms, Rental Units, Rental Packages, Group Avail. Matrix and Rental Inventory Avail..

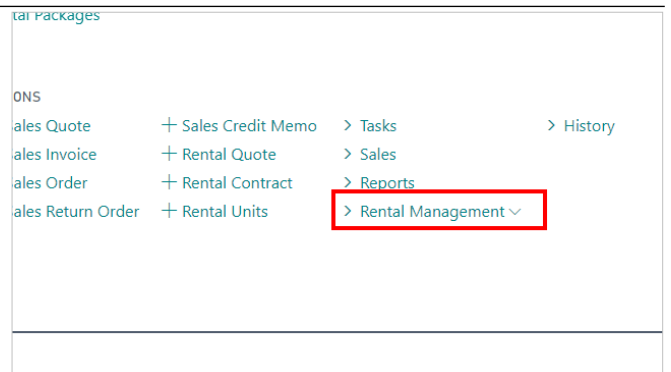


Click on **Actions**

The Actions part contains the options to create a new Rental Quote. Rental Contract or Rental Unit.



Click on the navigation menu item popup **Rental Management**



The Rental Management provides the following menu options:

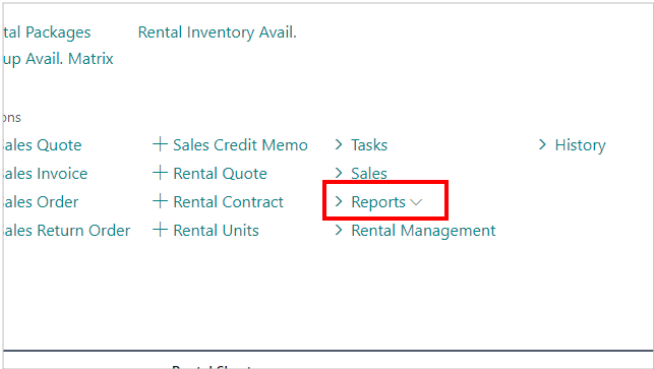
- The Rental Invoicing Worksheet for batch invoicing contracts
- Rental Rapid Return for returning Rental Units using the Rental Unit No. or Serial No. of a unit for any contract
- The Rental FA Transfer Journal for transferring Fixed Assets linked to Rental Units to different rental locations.
- The Group Availability Matrix for reviewing the availability of units in rental unit groups
- The Rental Inventory Availability for reviewing the item availability of items linked to rental units
- The Sub Rental Worksheet
- ODT Rental Online Help for accessing the user help

Rental reports are located via the following steps, which provides a list of rental reports available.



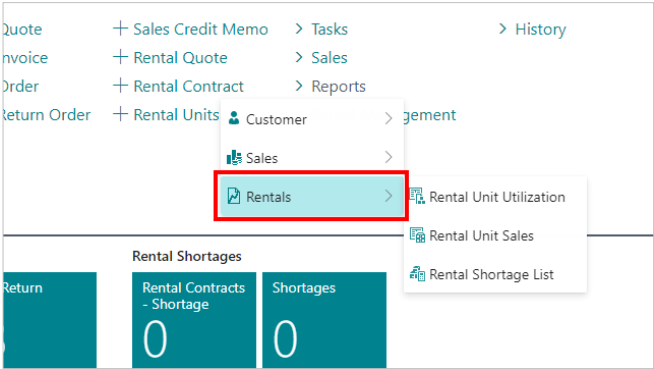
ODT Rentals Online Help

Click on the navigation menu item popup **Reports**



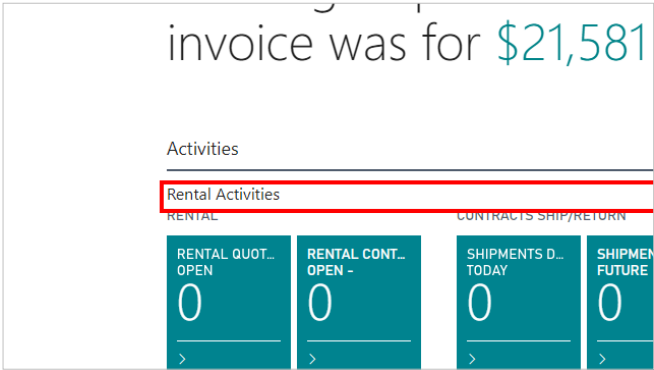
Click on the navigation menu item popup **Rentals**

A listing of the rental reports will be displayed.



Click on the label **Rental Activities**

The Activities part in the role center contains a Rental Activities section. This section contains the cues for open Rental Quotes and Rental Contracts, and cues for Pending Shipments and Returns by Contract and by Rental Unit.

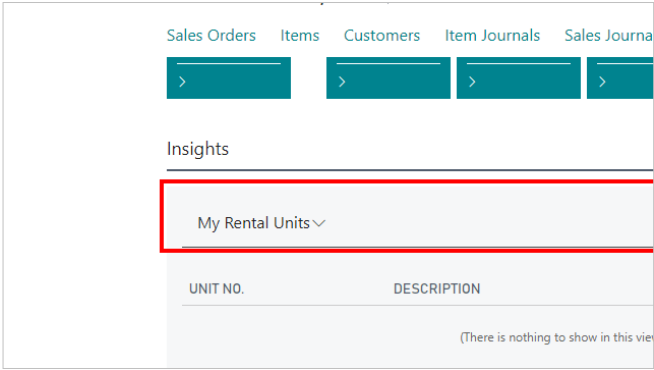


When on Rental Management Setup the field, Shortage Cues Visible is enabled, then the Rental Shortages Cues will be displayed.

To learn about the Rental Shortages Cues, see the ODT Rental Online Help in Processing Rentals, Resolving Rental Shortages.

Click on **My Rental Units**

A list part for Rental Units has been provided in the Role Center in the Business Assistance section, to enable users to add Rental Units most used, for quick and easy access to those units.



1.1.1.5. How to Access ODT Rental Online Help

A link to ODT Rentals Online Help is provided on the Business Manager and Sales Order Processor Profiles on the Home page.



ODT Rentals Online Help

The ODT Rentals 365 Help Portal covers information about the rentals and includes help for setting up and processing rentals.

The help portal provides the help in a variety of formats, including, pdf documents, power point slides and videos with the options of, Show Me, Teach Me and Test Me.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company. Therefore the help refers to Tax Group Code.

Should your organization be using the Global version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

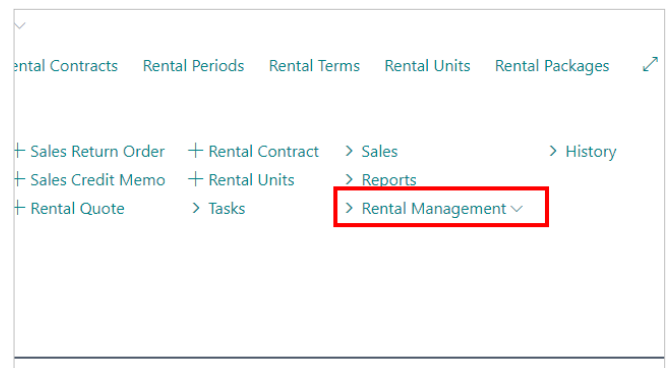
For information on using Price Incl. VAT in the Global version of ODT Rentals, see Rest of World Additional Rental Processes, Processing Rentals using Price Incl. VAT.

The following demonstrates the accessing of the ODT Rental Online Help.

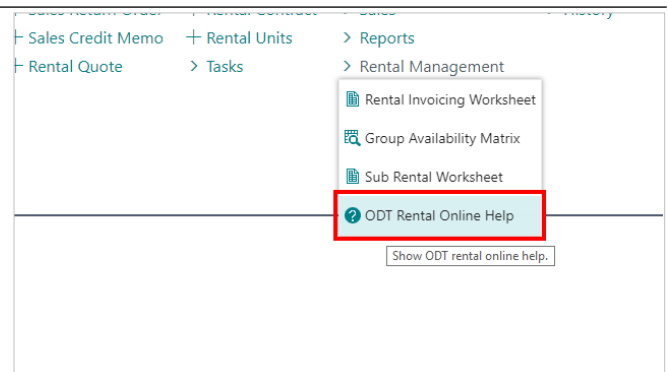
Business Manager Profile

The steps are the same when using the Sales Order Processor Profile.

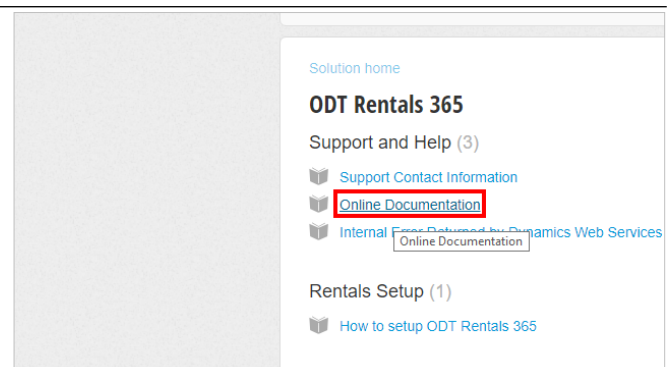
Click on the link **Rental Management**



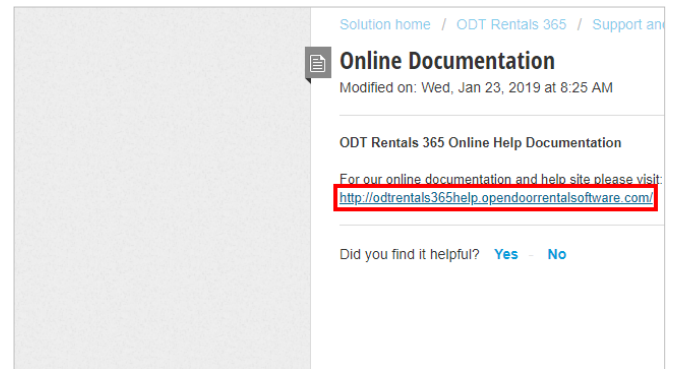
Click on the link **ODT Rental Online Help**



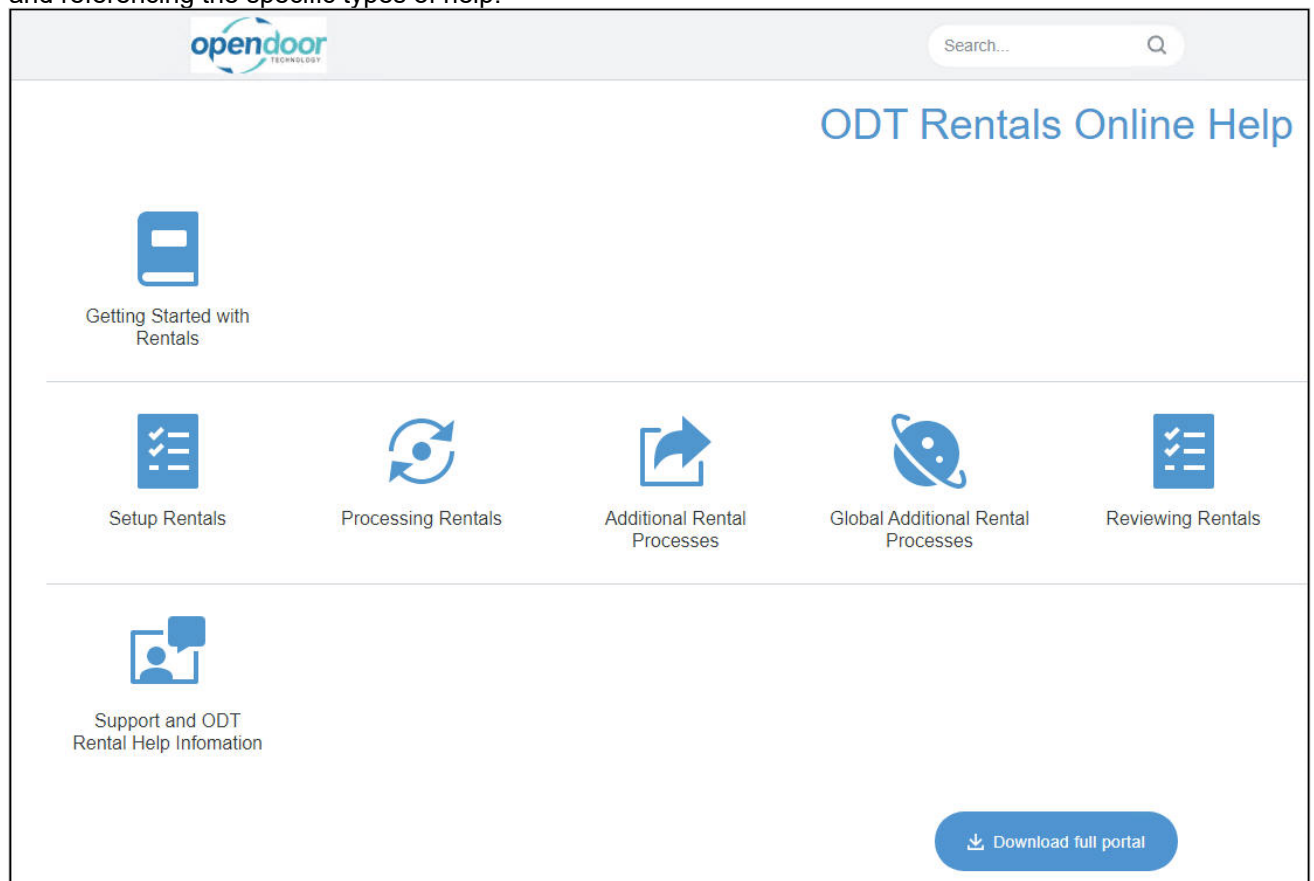
Click on the link **Online Documentation**



Click on the link
<http://odtrentals365help.opendoorrentalsoftware.com/>



Below is a picture of the initial portal page where the rental help is broken into categories for ease of locating and referencing the specific types of help.



To view a table of contents for the ODT Rentals 365 Help Portal, click on Content at the bottom of the window.

1.1.1.6. How to Access ODT Rentals 365 Release Notes

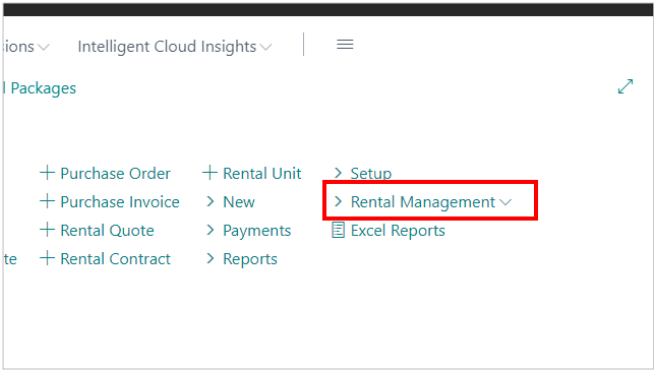
With each release, a Release Notes document is published containing new features and issue fixes. The Release Notes are created based on Dynamics 365 Business Central for North America and Global (Rest of World)

The following steps demonstrate how to access the Release Notes.

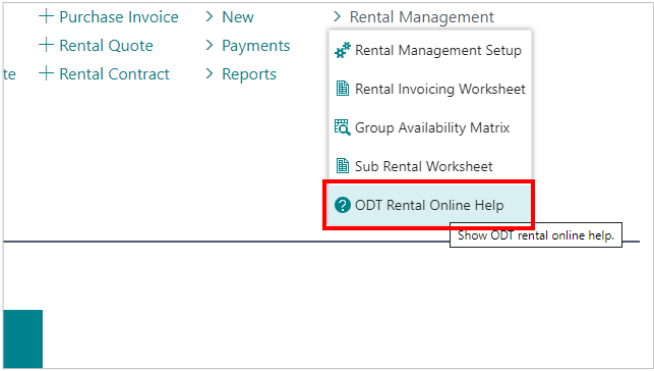


ODT Rentals Online Help

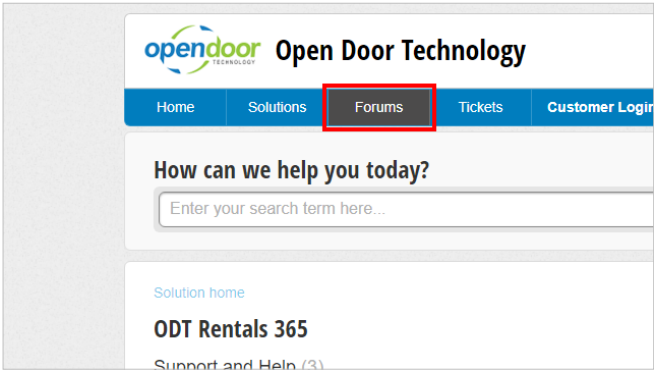
Click on the navigation menu item popup **Rental Management**



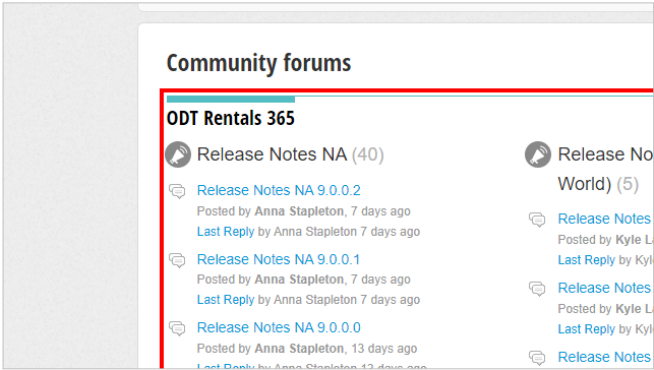
Click on the navigation menu item **ODT Rental Online Help**



Click on the link **Forums**



Click on **ODT Rentals 365**



Select and review the Release Notes that are applicable to your organization.

1.1.2. Rental Permission Set Up

In order to setup and process rentals, permission modeling is required to apply the proper level of security.

ODT Rentals has a rental specific Permission Set called “ODT Rentals” which must be added to the Permission Sets on all users, who require access to the rentals functionality.

All users require the D365 BASIC Permission Set as this is a required assignment for Dynamics 365 Business Central.

In addition to these Permission Sets, users will as well need to have other Dynamics 365 Business Central Permission Sets assigned to them in order to setup and/or process rentals.

Example 1

The user who would be responsible for setting up Dynamics 365 Business Central, such as perhaps creating a separate Tax Group Code and Tax Details for Rentals, or setting up the General Product Posting Groups and General Posting Setup would require the Permission Sets allowing them to do this.

Example 2

An Order Processor who would be entering and/or processing rentals would still require the Permissions Sets needed for a Sales Order Processor who would be creating, entering, shipping, returning and invoicing Sales Orders.

For information on assigning Permission Sets to Users or User Groups, see Dynamics 365 Business Central help.

2. Setup Rentals

2.1. Rentals Setup Overview

2.1.1. Introduction to Rentals Setup

2.1.1.1. Overview

Before you can manage rental processes, you must configure the rules and values that define the company rental policies.

First, you must define the general setup, such as which rental documents are required and how their values are posted. This general setup is typically performed once during the initial implementation.

For the Rentals App there are 2 ways in which the basic setups can be completed.

Open Door Technology Inc. has provided the option to use a Wizard to setup the following setups. To see information on the Rentals Setup Wizard, go to the help book called Rentals App Setup Wizard. This option would still require you to setup the locations to rent from, if applicable, the rental units, which your company rents out and the rental prices on the rental units.

- Posting Groups
- Rental Periods
- Rental Terms
- No. Series for Rental Documents
- Rental Management Setup

The second option is for you to complete the setups yourself.

The majority of the required setups for Rentals is completed using the Business Manager profile. However, some of the setups are completed in the Dynamics 365 Business Central setups.

Before commencing the following setups, the Rental Management Setup must be opened to enable the software. The steps for this are included in the How to Open Rental Management chapter.

ODT Rentals Online Help

The Basic set up necessary for all companies using Rental Software includes the following. For information on performing these setups see the individual help provided.

- Rental Periods
- Rental Terms
- Locations, if applicable
- Rental Units
- Rental Packages, if applicable
- Rental Prices
- Posting Groups
- No. Series for Rental Documents
- Rental Management Setup

The setup of Locations to rent from is optional.

If using Locations to rent from, and they are to be mandatory, then on Rental Management Setup, enable the field, Location Mandatory.

This will ensure that when new Rental Units are created that the Location field is populated, and that a Location is entered on the rental quote and contract lines.

If linking rental units to items, and in Inventory Locations are used when purchasing and renting them via Rental Management, then it is highly recommended that Locations be used in rentals and be mandatory. This will enable the means to be able to determine what items and the quantity that are available for rent and the quantity out on rent.

For information on the use of Locations with rentals, see the ODT Rentals Online Help, Setup Rentals - Setup Rental Locations.

Should your organization be planning on using any of the additional rental processes, then there will be additional setups for some of these features.

To learn what is included in additional rental features and processes, see ODT Rental Online help, Additional Rental Processes.

IMPORTANT

The user help was created using Dynamics 365 Business Central for North America, in a United States company.

Therefore, the user help refers to the Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, where the Tax Group Code is referred to consider this as VAT Prod. Posting Group.

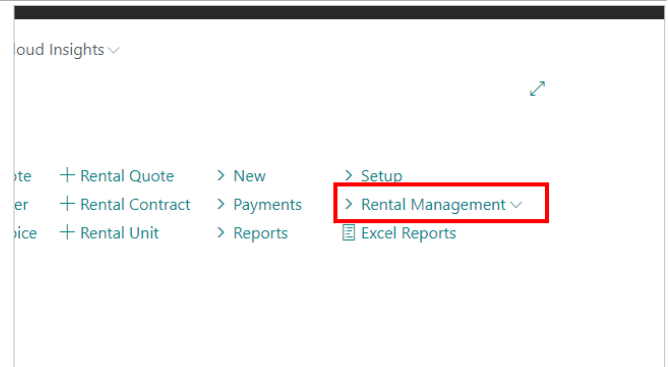
In addition, the Rest of World version of ODT Rentals contains the capability for rental pricing to be Price Incl. VAT, which is not included in the North America version.

For information on renting product using Price Incl. VAT, see ODT Rental Online Help, Rest of World Additional Processes - Processing Rentals using Price Incl. VAT.

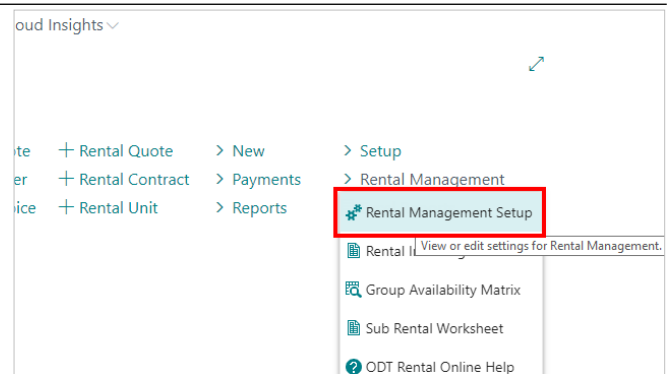
2.1.1.2. How to Open Rental Management Setup

Profile - Business Manager

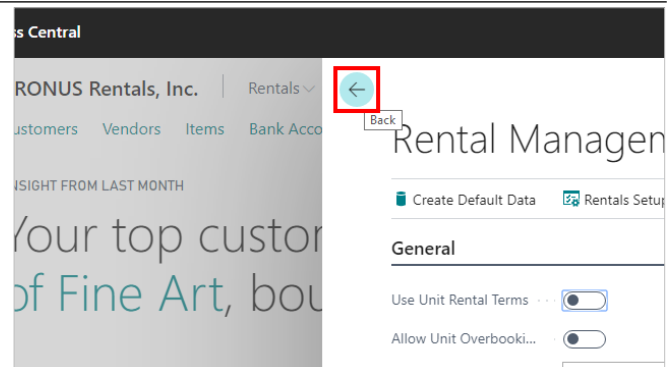
Click on the link **Rental Management**



Click on the link **Rental Management Setup**



Click on the back button



2.2. Rentals App Setup Wizard

2.2.1. ODT Rental Setup Wizard

2.2.1.1. Overview

Open Door Technology Inc. has provided a Wizard to setup the following setups.

- Posting Group
- Rental Periods
- Rental Terms
- No. Series for Rental Documents
- Rental Management Setup Once the wizard has been ran, the setup of Rental Locations, Rental Units and assignment of Rental Prices to the units is required prior to beginning to process rentals.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company. Therefore the help refers to Tax Group Code.

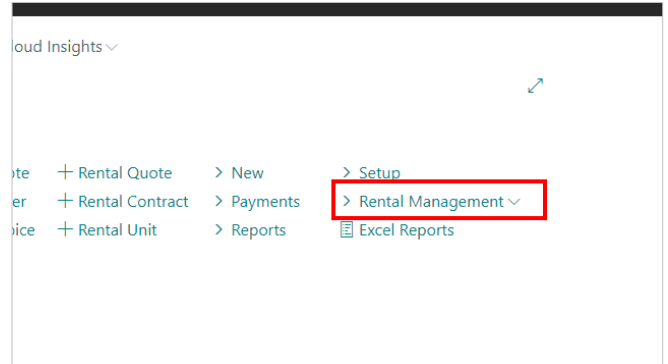
Should your organization be using the Rest of World version of Business Central, then throughout the help,

consider Tax Group Code to refer to VAT Prod. Posting Group.

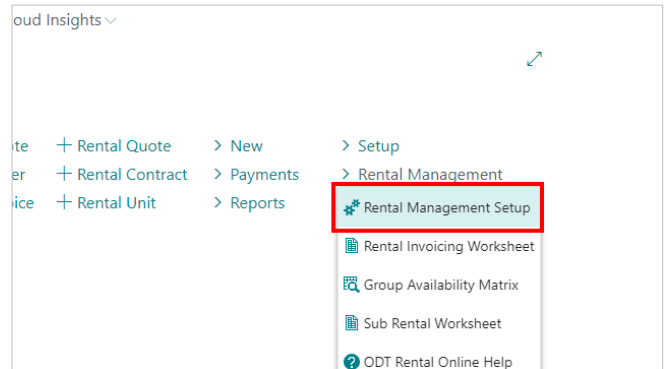
2.2.1.2. How to Process the ODT Rentals Setup Wizard

Profile - Business Manager The following demonstrates the processing of the ODT Rentals Setup Wizard.

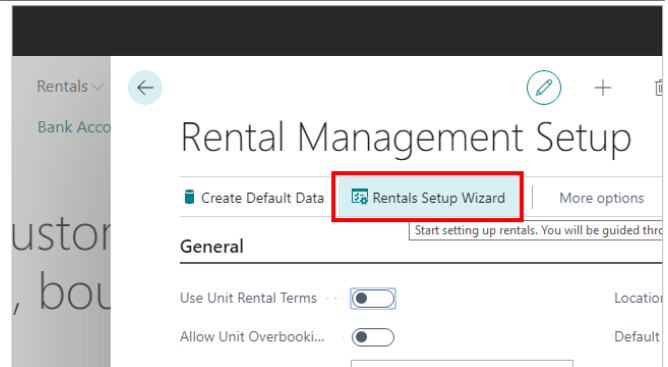
Click on the link **Rental Management** 



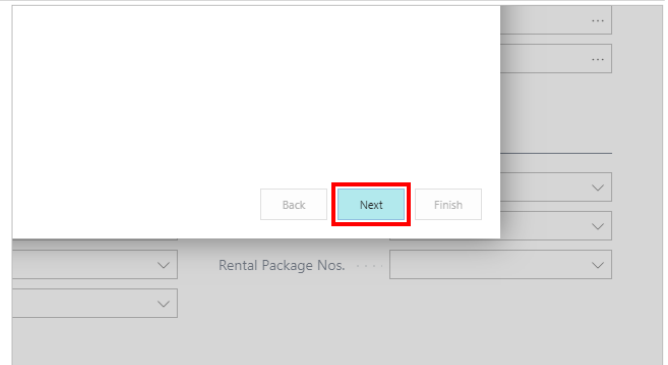
Click on the link **Rental Management Setup**



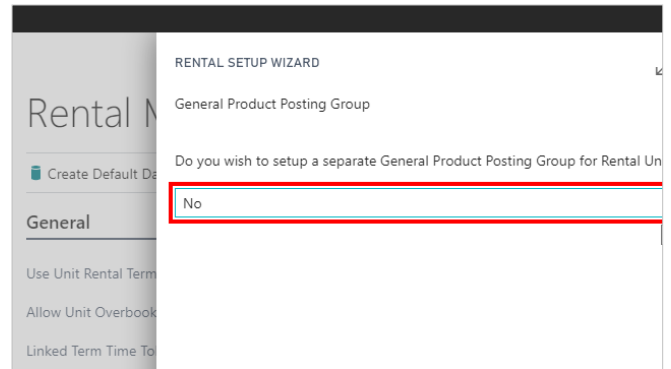
Click on the link **Rentals Setup Wizard**



Click on the button **Next**



Click on the field **Do you wish to setup a separate General Product Posting Group for Rental Units?**

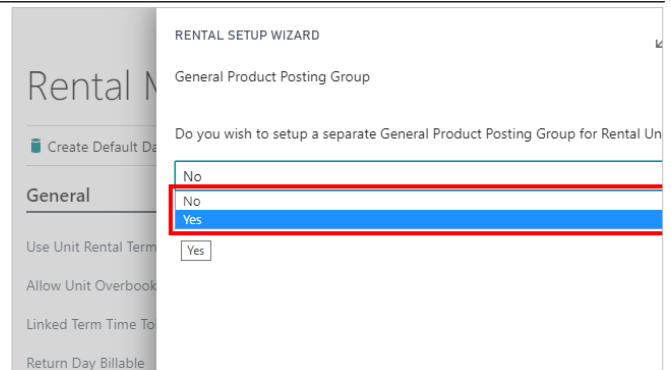


Click on the item **Yes** in the list

When Yes is selected to create a new General Product Posting Group, the next window will provide a suggested Code and Description which can be overridden.

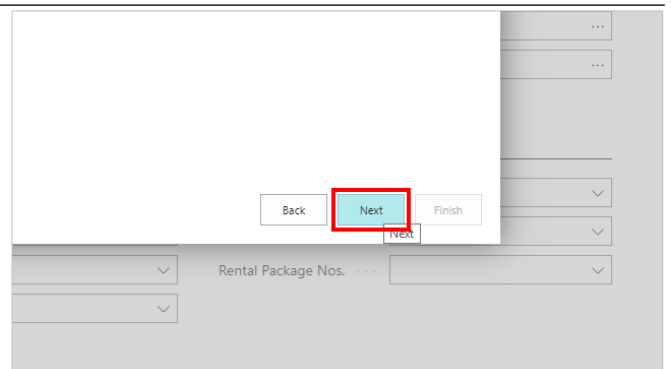
When No is selected, then the next window will provide the ability to look up and select a maximum of 3 General Product Posting Groups to which rentals are to apply to.

Should your organization have more than 3, then these will need to be configured manually.

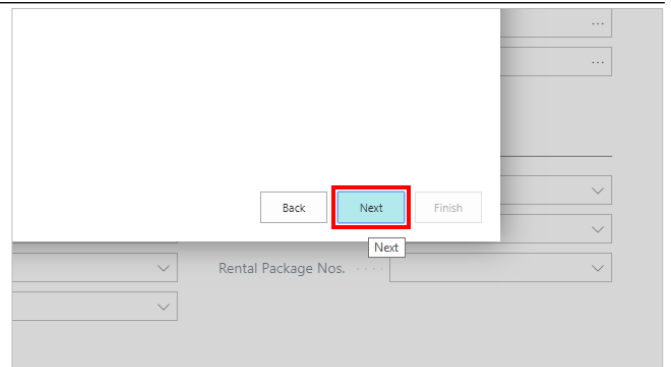


Click on the button **Next**

The suggested Code and Description can be overridden.



Click on the button **Next**





Click on the lookup button **Look up value**

The screenshot shows a software window with a dropdown menu open. The dropdown menu has a search bar and a 'Look up value' button highlighted with a red box. The background window has a 'SAVED' status and a 'New Payments Reports' link.

Click on **Code = DOMESTIC, Description = Domestic customers and vendors**

The screenshot shows a 'RENTAL SETUP WIZARD' window. It asks 'Which General Business Posting Groups are applicable to R'. Below is a table with two columns: 'CODE' and 'DESCRIPTION'. The first row has 'DOMESTIC' in the 'CODE' column and 'Domestic customers and vendors' in the 'DESCRIPTION' column. This row is highlighted with a red box. Below the table is a '+ New' button and a note: 'Select record "DOMESTIC" in your company used different G/L Accounts for each General Business Posting Group then please go to General Posting Setup and revise as needed.'

Click on the button **Next**

The screenshot shows a software window with a 'Next' button highlighted with a red box. There are also 'Back' and 'Finish' buttons. Below the buttons is a 'Rental Package Nos.' field with a dropdown arrow.

Click on the lookup button **Look up value**

The screenshot shows a software window with a dropdown menu open. The dropdown menu has a search bar and a 'Look up value' button highlighted with a red box. The background window has a 'SAVED' status and a 'New Payments Reports' link.



ODT Rentals Online Help

Click on **No. = 40100, Name = Income, Services, Income/Balance = 0**

Select the G/L Account to which rental revenue is to be posted to.

NO.	NAME	IN
40001	INCOME	In
40100	Income, Services	In
40250	Job Sales	In
40300	Sales Discounts	In

Click on the button **Next**

Click on the field **Does your company charge Damage Waivers as a unit price, in addition to Rental Charges?**

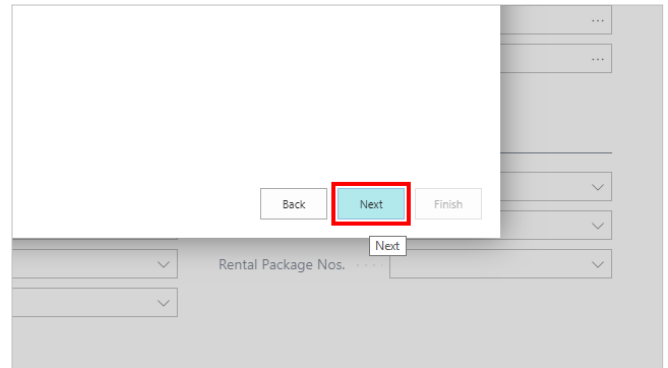
Damage Waivers are optional.

Should an organization not be charging a Damage Waiver leave No as the selection in this field. The next window will not be displayed when the No is the selection.

Click on the item **Yes** in the list

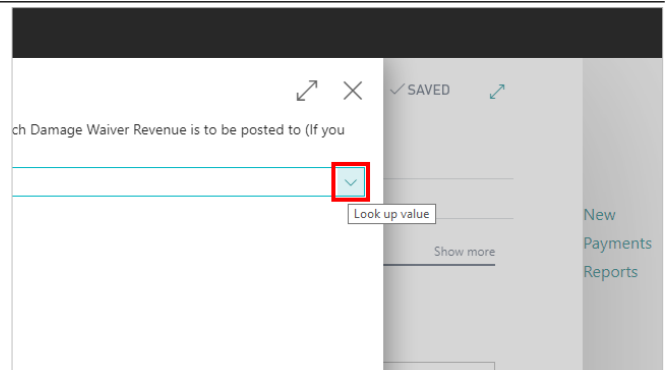
ODT Rentals Online Help

Click on the button **Next**



The screenshot shows a web interface with a modal window. At the bottom of the modal, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a red rectangular box. Below the modal, there is a dropdown menu labeled 'Rental Package Nos.' with a 'Next' button next to it.

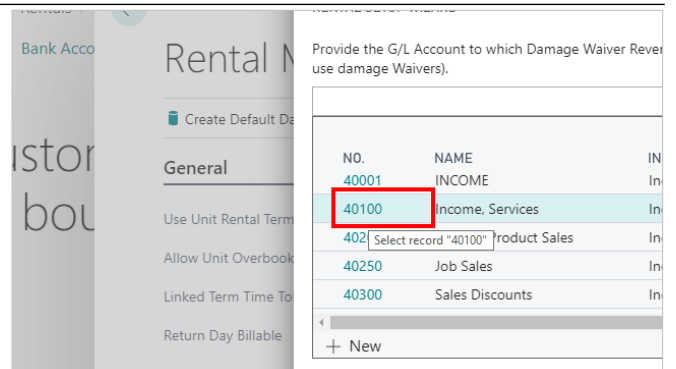
Click on the lookup button **Look up value**



The screenshot shows a web interface with a modal window. At the bottom of the modal, there is a button labeled 'Look up value' which is highlighted with a red rectangular box. To the right of the modal, there is a sidebar with a 'New Payments Reports' link.

Click on **No. = 40100, Name = Income, Services, Income/Balance = 0**

Select the G/L Account to which damage waiver revenue is to be posted to.

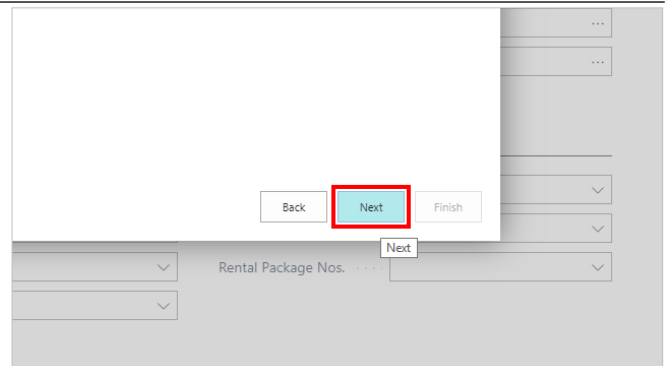


The screenshot shows a web interface with a modal window. The modal contains a table with the following data:

NO.	NAME	IN
40001	INCOME	In
40100	Income, Services	In
402	Select record "40100" Product Sales	In
40250	Job Sales	In
40300	Sales Discounts	In

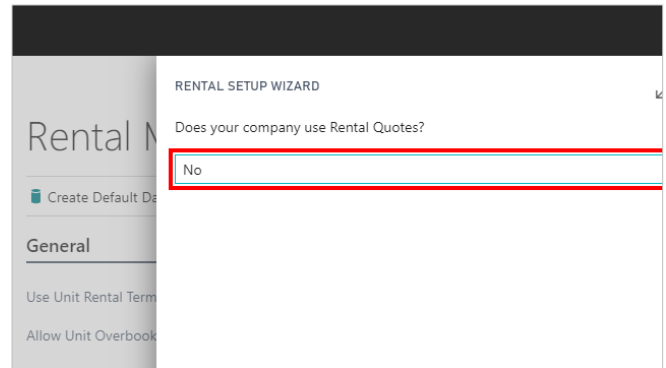
The row with '40100 Income, Services' is highlighted with a red rectangular box. Below the table, there is a '+ New' button.

Click on the button **Next**



The screenshot shows a web interface with a modal window. At the bottom of the modal, there are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a red rectangular box. Below the modal, there is a dropdown menu labeled 'Rental Package Nos.' with a 'Next' button next to it.

Click on the field **Does your company use Rental Quotes?**



RENTAL SETUP WIZARD

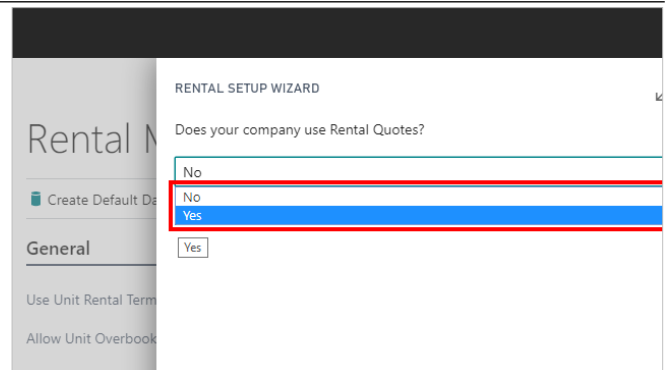
Does your company use Rental Quotes?

No

If your organization wishes to use the Sales Quote No. Series for Rental Quotes, then select No.

If your organization wishes to use a different No. Series for Rental Quotes than the Sales Quote No. Series, then select Yes.

If Yes is selected, then you will be prompted to provide the No. Series to be setup. Click on the item **Yes** in the list



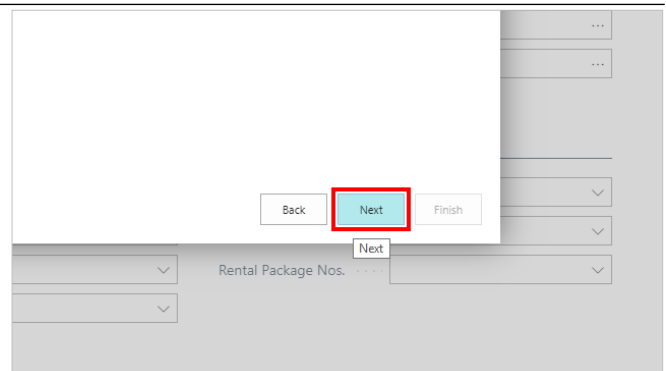
RENTAL SETUP WIZARD

Does your company use Rental Quotes?

No

Yes

Click on the button **Next**

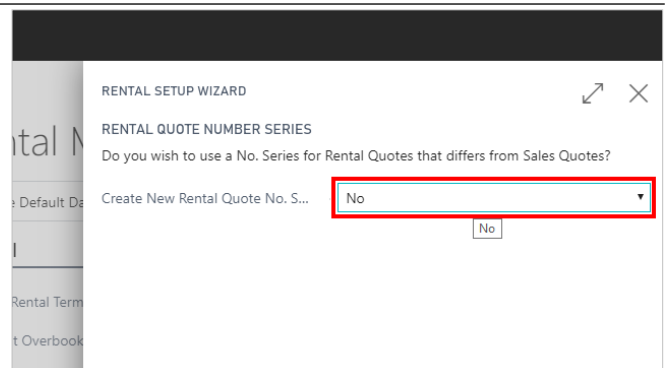


Back Next Finish

Next

Rental Package Nos. ...

Click on the field **Create New Rental Quote No. Series?**



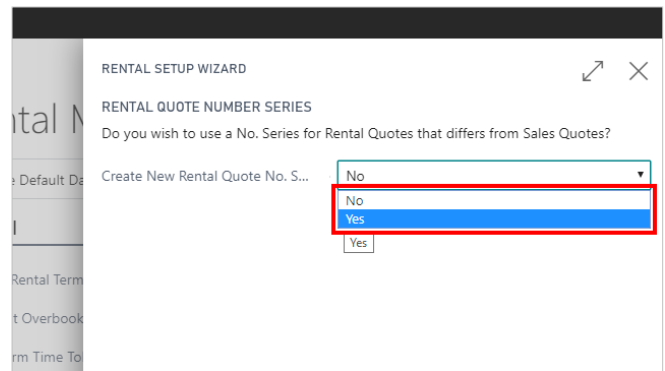
RENTAL SETUP WIZARD

RENTAL QUOTE NUMBER SERIES

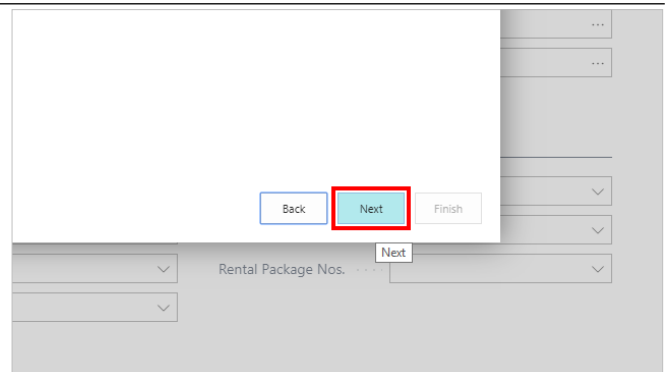
Do you wish to use a No. Series for Rental Quotes that differs from Sales Quotes?

Create New Rental Quote No. S... No

Click on the item **Yes** in the list



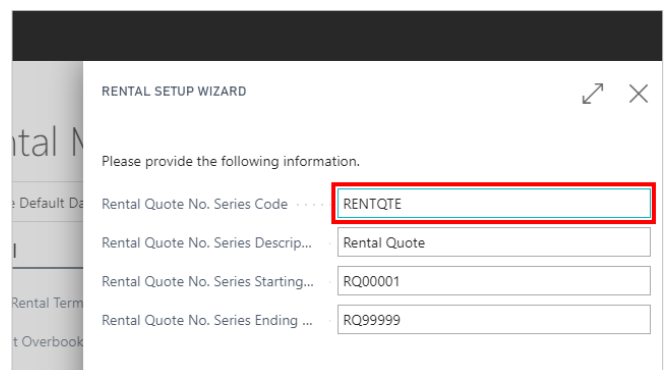
Click on the button **Next**



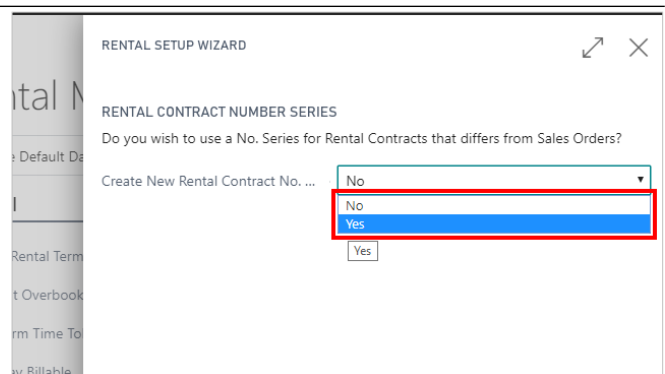
The wizard provides suggestions on the No. Series setup for rentals.

These can be overridden.

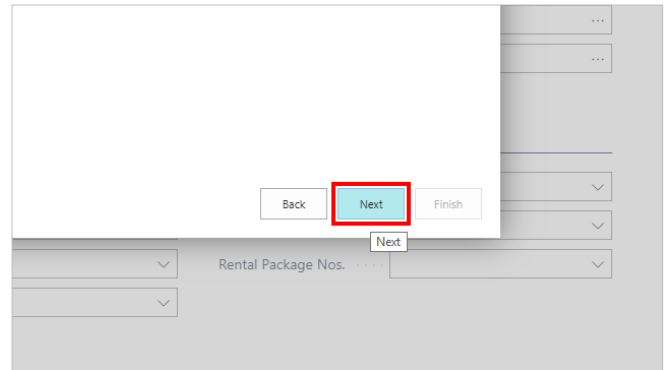
Click on the field **Do you wish to use a No. Series for Rental Quotes that differs from Sales Quotes?**



Click on the item **Yes** in the list



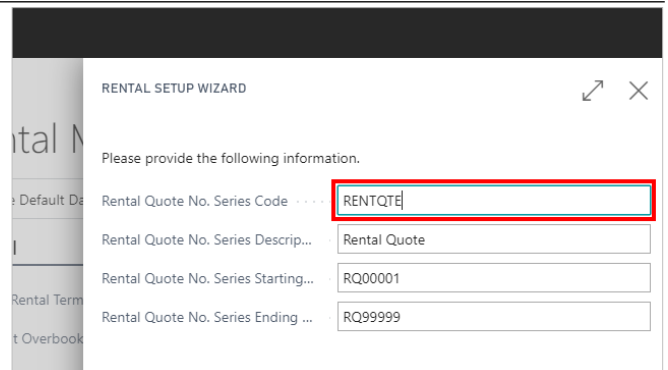
Click on the button **Next**



A screenshot of a web application interface. A modal window is open, showing a 'Back' button, a 'Next' button (highlighted with a red box), and a 'Finish' button. Below the modal, there are dropdown menus and a 'Next' button. The text 'Rental Package Nos.' is visible.

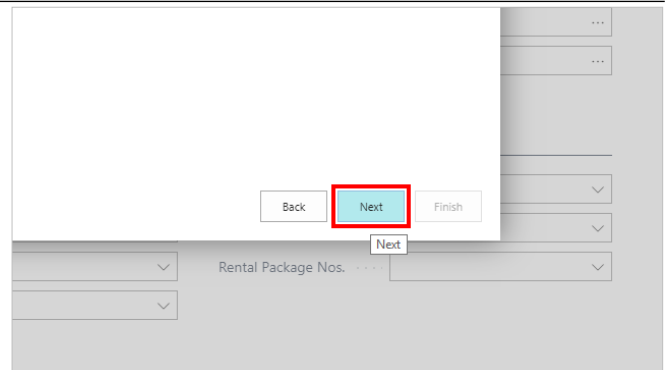
Click on the field **Rental Quote No. Series Code**

The No. Series Code, Description and numbering can be overridden.



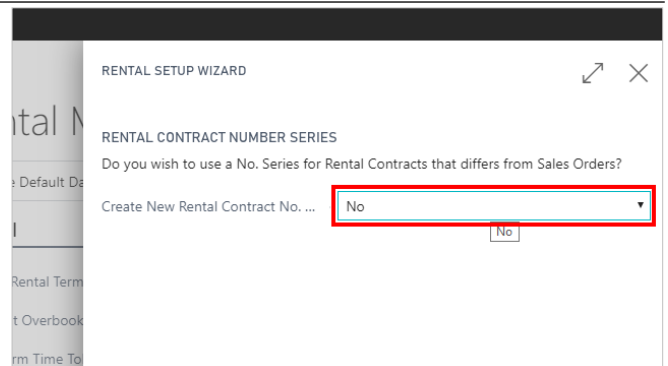
A screenshot of the 'RENTAL SETUP WIZARD' window. It contains several input fields. The 'Rental Quote No. Series Code' field is highlighted with a red box and contains the text 'RENTQTE'. Other fields include 'Rental Quote No. Series Descrip...' with 'Rental Quote', 'Rental Quote No. Series Starting...' with 'RQ00001', and 'Rental Quote No. Series Ending ...' with 'RQ99999'.

Click on the button **Next**



A screenshot of a web application interface, similar to the first one. A modal window is open, showing a 'Back' button, a 'Next' button (highlighted with a red box), and a 'Finish' button. Below the modal, there are dropdown menus and a 'Next' button. The text 'Rental Package Nos.' is visible.

Click on the field **Do you wish to use a No. Series for Rental Contracts that differs from Sales Orders?**



A screenshot of the 'RENTAL SETUP WIZARD' window. It contains a question: 'Do you wish to use a No. Series for Rental Contracts that differs from Sales Orders?'. Below the question is a dropdown menu labeled 'Create New Rental Contract No. ...' with 'No' selected. The dropdown menu is highlighted with a red box.



Click on the item **Yes** in the list

RENTAL SETUP WIZARD

RENTAL CONTRACT NUMBER SERIES

Do you wish to use a No. Series for Rental Contracts that differs from Sales Orders?

Create New Rental Contract No. ...

- No
- Yes**

Yes

Click on the button **Next**

Back **Next** Finish

Next

Rental Package Nos. ...

Click on the field **Rental Contract No. Series Code**

The No. Series Code, Description and numbering can be overridden.

RENTAL SETUP WIZARD

Please provide the following information.

Rental Contract No. Series Code ... **RENTCONT**

Rental Contract No. Series Descr... Rental Contract

Rental Contract No. Series Starti... RC00001

Rental Contract No. Series Endin... RC99999

Click on the button **Next**

Back **Next** Finish

Next

Rental Package Nos. ...



Click on the field **Do you wish to use a No. Series for Rental Invoices that differs from Sales Invoices?**

If your organization wishes to use the Sales Invoice No. Series for Rental Invoices, then No should be selected.

If your organization wishes to use a different No. Series for Rental Invoices than the Sales Invoice No. Series, then select Yes.

If Yes is selected, then you will be prompted to provide the No. Series setup.

Click on the item **Yes** in the list

Click on the button **Next**

Click on the field **Rental Invoice No. Series Code**

The No. Series Code, Description and numbering can be overridden.



Click on the button **Next**

A screenshot of a web application interface. A modal dialog box is open, centered on the screen. It has a white background and a thin grey border. Inside the dialog, there are three buttons: 'Back' on the left, 'Next' in the center, and 'Finish' on the right. The 'Next' button is highlighted with a red rectangular border. Below the dialog, a portion of the main application form is visible, showing a 'Rental Package Nos.' field with a dropdown arrow.

Click on the field **Rental Delivery No. Series Code**

The No. Series Code, Description and numbering can be overridden.

A screenshot of the 'RENTAL SETUP WIZARD' dialog box. The title bar says 'RENTAL SETUP WIZARD'. The main heading is 'RENTAL DELIVERY NUMBER SERIES'. Below it, a message says 'Please provide the following information for setup of No. Series for Rental Deliveries.' There are four input fields: 'Rental Delivery No. Series Code' (containing 'RENTDEL'), 'Rental Delivery No. Series Description' (containing 'Rental Delivery'), 'Rental Delivery No. Series Starting...' (containing 'RD00001'), and 'Rental Delivery No. Series Ending...' (containing 'RD99999'). The 'RENTDEL' text in the first field is highlighted with a red rectangular border.

Click on the button **Next**

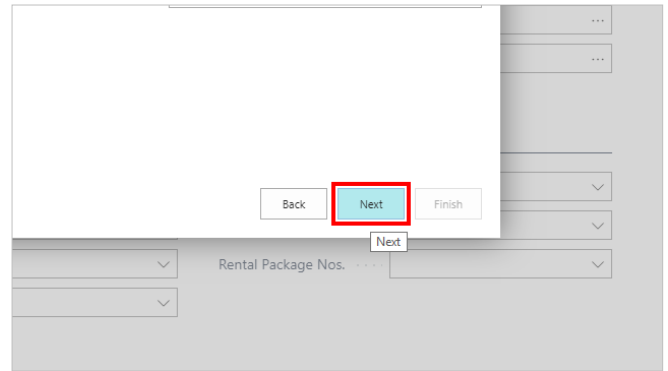
A screenshot of a web application interface, similar to the first one. A modal dialog box is open, centered on the screen. It has a white background and a thin grey border. Inside the dialog, there are three buttons: 'Back' on the left, 'Next' in the center, and 'Finish' on the right. The 'Next' button is highlighted with a red rectangular border. Below the dialog, a portion of the main application form is visible, showing a 'Rental Package Nos.' field with a dropdown arrow.

Click on the field **Rental Return No. Series Code**

The No. Series Code, Description and numbering can be overridden.

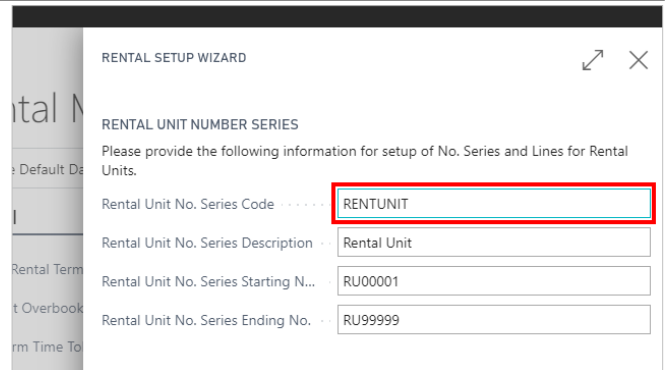
A screenshot of the 'RENTAL SETUP WIZARD' dialog box. The title bar says 'RENTAL SETUP WIZARD'. The main heading is 'RENTAL RETURN NUMBER SERIES'. Below it, a message says 'Please provide the following information for setup of No. Series and Lines for Rental Returns.' There are four input fields: 'Rental Return No. Series Code' (containing 'RENTRTN'), 'Rental Return No. Series Description' (containing 'Rental Return'), 'Rental Return No. Series Starting...' (containing 'RR00001'), and 'Rental Return No. Series Ending ...' (containing 'RR99999'). The 'RENTRTN' text in the first field is highlighted with a red rectangular border.

Click on the button **Next**

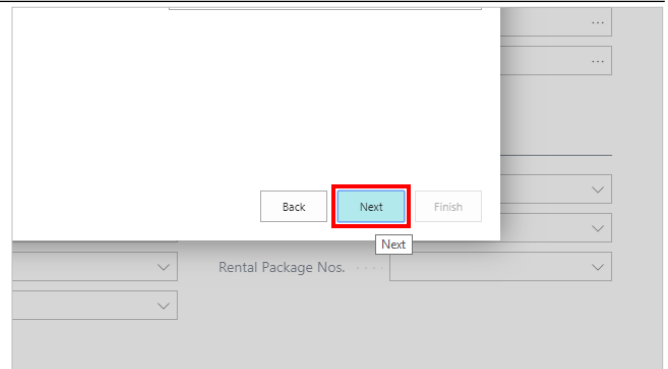


Click on the field **Rental Unit No. Series Code**

The No. Series Code, Description and numbering can be overridden.



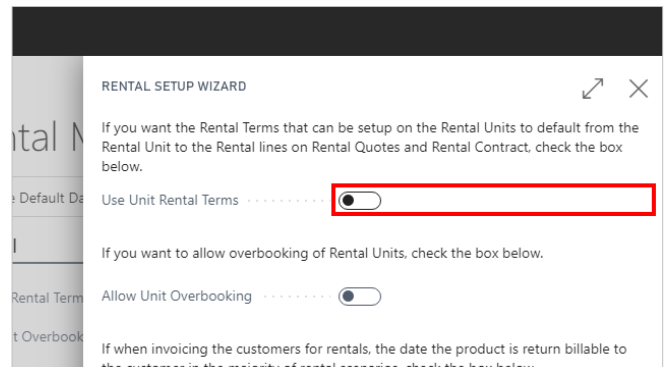
Click on the button **Next**



For the following option fields, they are by default disabled. Clicking on the field will enable the option.

Click on **Use Unit Rental Terms**

When the field is enabled, then when a Rental Terms is specified on a Rental Unit, this term will default to the Rental Line upon selection of the unit on Rental Quotes and Rental Contracts.

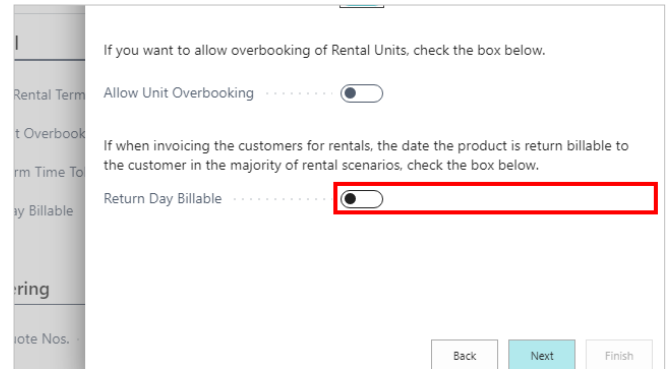


NOTE

Should the organization want to allow overbooking of all rental unit groups and units not assigned to a group, then the Allow Overbooking field should be enabled.

Click on **Return Day Billable**

The Return Day Billable field should be enabled, if customers are to be billed for the date that the Rental Unit is returned.



If you want to allow overbooking of Rental Units, check the box below.

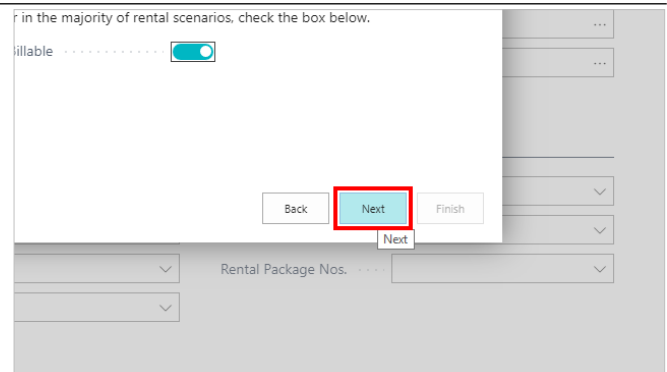
Rental Term Allow Unit Overbooking ☐

If when invoicing the customers for rentals, the date the product is return billable to the customer in the majority of rental scenarios, check the box below.

Return Day Billable ☒

Back Next Finish

Click on the button **Next**



If when invoicing the customers for rentals, the date the product is return billable to the customer in the majority of rental scenarios, check the box below.

Return Day Billable ☒

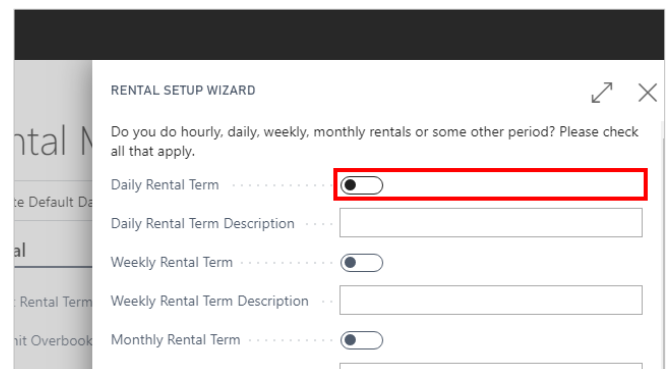
Back Next Finish

Rental Package Nos.

The following demonstrates the specification of the rental billing rate lengths for the rental terms, and a description to be included in the rental term description.

Only those that apply to the organization need to be completed.

Click on **Daily Rental Term**



RENTAL SETUP WIZARD

Do you do hourly, daily, weekly, monthly rentals or some other period? Please check all that apply.

Daily Rental Term ☒

Daily Rental Term Description

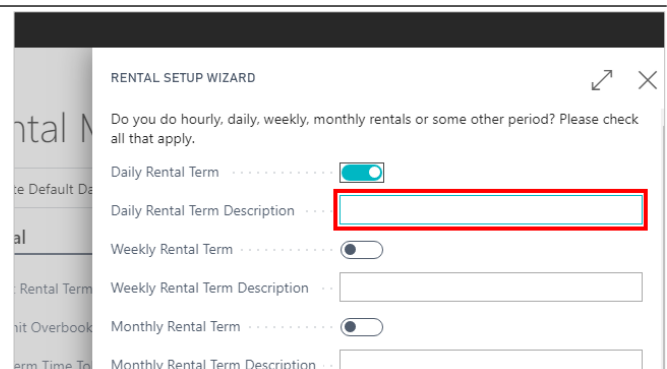
Weekly Rental Term ☐

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description

Click on the field **Daily Rental Term Description**



RENTAL SETUP WIZARD

Do you do hourly, daily, weekly, monthly rentals or some other period? Please check all that apply.

Daily Rental Term ☒

Daily Rental Term Description

Weekly Rental Term ☐

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description



Enter the text **Daily Rental**.

RENTAL SETUP WIZARD

Do you do hourly, daily, weekly, monthly rentals or some other period? Please check all that apply.

Daily Rental Term ☒

Daily Rental Term Description

Weekly Rental Term ☐

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description

Click on **Weekly Rental Term**

RENTAL SETUP WIZARD

all that apply.

Daily Rental Term ☒

Daily Rental Term Description

Weekly Rental Term ☒

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description

28 Day Rental Term ☐

Click on the field **Weekly Rental Term Description**

RENTAL SETUP WIZARD

all that apply.

Daily Rental Term ☒

Daily Rental Term Description

Weekly Rental Term ☒

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description

28 Day Rental Term ☐

28 Day Rental Term Description

Enter the text **Weekly Rental**.

RENTAL SETUP WIZARD

all that apply.

Daily Rental Term ☒

Daily Rental Term Description

Weekly Rental Term ☒

Weekly Rental Term Description

Monthly Rental Term ☐

Monthly Rental Term Description

28 Day Rental Term ☐

28 Day Rental Term Description



ODT Rentals Online Help

Click on **Monthly Rental Term**

The screenshot shows a form with various rental term options. The 'Monthly Rental Term' field is highlighted with a red box. The form includes fields for 'Daily Rental Term', 'Weekly Rental Term', 'Monthly Rental Term', '28 Day Rental Term', and 'Hourly Rental Term', each with a corresponding description field and a toggle switch.

Click on the field **Monthly Rental Term Description**

The screenshot shows the same form as before, but now the 'Monthly Rental Term Description' field is highlighted with a red box. The 'Monthly Rental Term' toggle is also visible.

Enter the text **Monthly Rental**.

The screenshot shows the same form as before, but now the 'Monthly Rental Term Description' field contains the text 'Monthly Rental'. The 'Monthly Rental Term' toggle is also visible.

Click on the option for a 28 Day Rental Term and enter a description, if 28 day rentals is a pricing schema used by your organization.

Click on **Hourly Rental Term**

Enable the Hourly Rental Term field should the organization be tracking rentals based on time out and time returned.

The screenshot shows the same form as before, but now the 'Hourly Rental Term' field is highlighted with a red box. The 'Monthly Rental Term' toggle is also visible. At the bottom of the form, there are buttons for 'Back', 'Next', and 'Finish', and a section for 'Rental Package Nos.'.



ODT Rentals Online Help

Click on **Other Rental Terms**

Enable the Other Rental Terms field when the above options do not include those used by the organization.

The screenshot shows the 'Monthly Rental Term' section of the Rental Setup Wizard. The 'Monthly Rental Term Description' is set to 'Monthly Rental'. The '28 Day Rental Term' and '28 Day Rental Term Description' are disabled. The 'Hourly Rental Term' is enabled. The 'Other Rental Terms' field is highlighted with a red box, indicating it should be enabled. The 'Back', 'Next', and 'Finish' buttons are visible at the bottom right.

Click on the button **Next**

When either Hourly Rental Term or Other Rental Terms are set to Yes, then this pop-up will occur.

The screenshot shows a pop-up window with the 'Next' button highlighted by a red box. The pop-up contains text about setting up rental periods and terms. The 'Back', 'Next', and 'Finish' buttons are visible at the bottom of the pop-up.

Click on the button **OK**

The screenshot shows a pop-up window with the 'OK' button highlighted by a red box. The pop-up contains text about setting up rental periods and terms. The 'OK' button is visible at the bottom right of the pop-up.

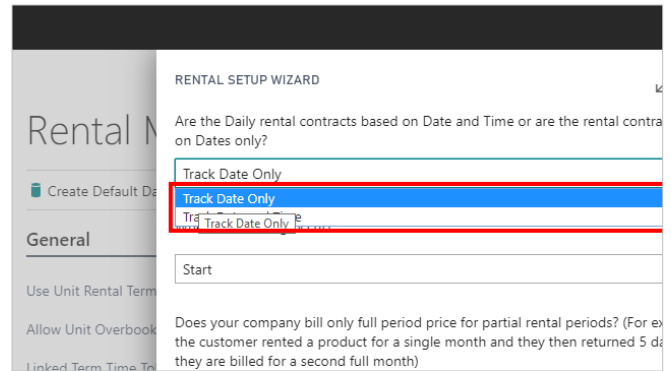
Click on the field **Are the rental contracts based on Date and Time or are the rental contracts based on Dates only?**

The screenshot shows the 'RENTAL SETUP WIZARD' window. The question 'Are the Daily rental contracts based on Date and Time or are the rental contracts based on Dates only?' is displayed. The 'Track Date Only' field is highlighted with a red box. The 'Track Date Only' button is visible at the bottom right of the field.

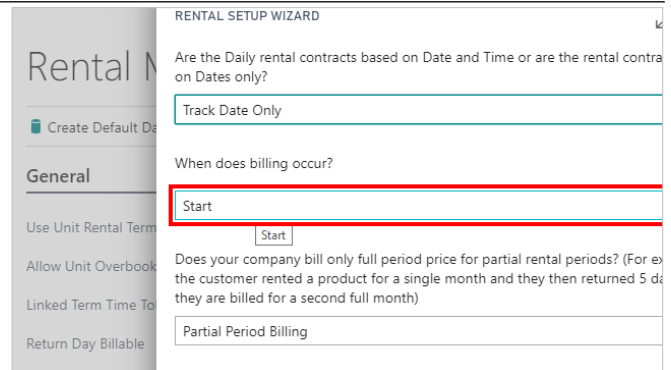
Click on the item **Track Date Only** in the list

The Tracking Date Only option should be selected when the organization only tracks rentals based on the date rented out, and date the units are returned.

When an organization tracks rentals based on time out and time returned, then select Tracking Date and Time.



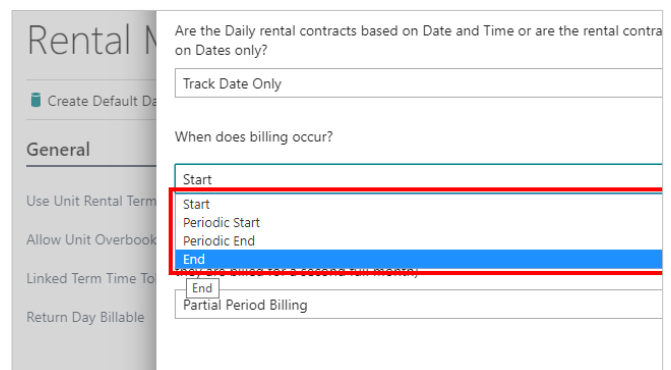
Click on the field **When does billing occur?**



Select the option that applies to the majority of the rentals.

- Select End if your organization invoices rentals in arrears for the full contract.
- Select Start if your organization invoices rentals in advance for the full contract.
- Select Periodic Start if your organization invoices the rentals on a per period basis in advance.
- Select Periodic End if your organization invoices the rentals on a per period basis in arrears.

Click on the item **End** in the list



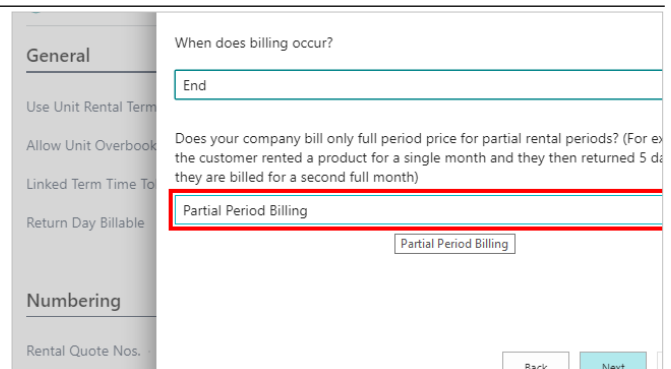
Click on the field **Does your company bill only full period price for partial rental periods?**

Click on the option field for choosing the most common billing practice used by your organization.

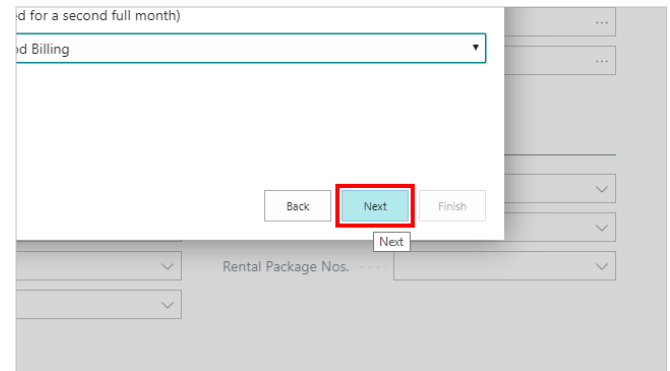
Should your organization bill for partial rental periods at a reduced rental price or a shorter rental period price, then select Partial Period Billing.

Should your organization bill for the full rental period at the full rental price when the rental units are returned early or late, then select Full Period Billing Only.

Only when Partial Period Billing is selected the following window open, where the selection of how the partial period billing is to be calculated is required.

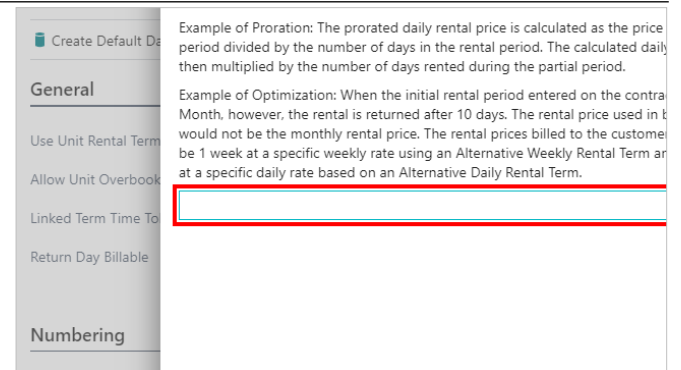


Click on the button **Next**



The screenshot shows a software window with a 'Next' button highlighted by a red rectangle. The window contains various input fields and a 'Back' button.

Click on the field **Is the price prorated or optimized for the period less than the full rental period?**



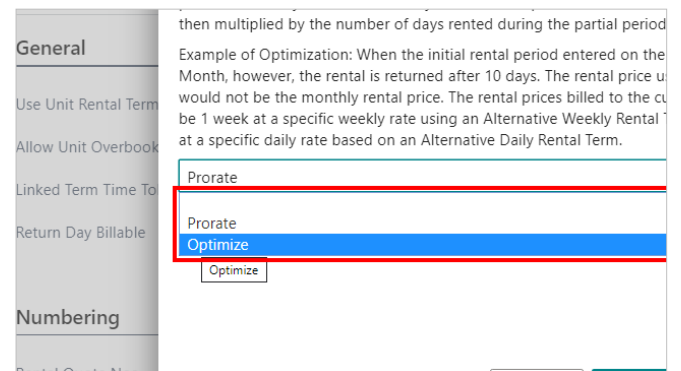
The screenshot shows a software window with a text field highlighted by a red rectangle. The field is labeled 'Is the price prorated or optimized for the period less than the full rental period?'. The window also includes a 'General' tab and a 'Numbering' section.

Select the option that applies to how the organization bills for partial periods.

- Should Optimize be selected an additional window will open, where you specify the rental periods for the creation of the optimized rental terms.
- Should Prorate have been selected, there is no additional step to complete.

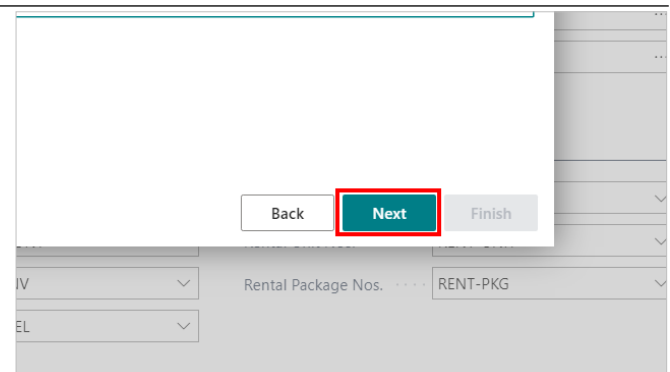
The following steps display the subsequent windows that occur should Optimize be selected.

Click on the item **Optimize** in the list



The screenshot shows a software window with a list of options: 'Prorate', 'Prorate', and 'Optimize'. The 'Optimize' option is highlighted with a blue background and a red border. Below the list is an 'Optimize' button.

Click on the button **Next**



The screenshot shows a software window with a 'Next' button highlighted by a red rectangle. The window contains various input fields and a 'Back' button.



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Click on the field **Optimized Term #1**

RENTAL SETUP WIZARD

Please provide the Rental Periods to be used when optimizing.

Optimized Term #1 ▼

Optimized Term #2 Look up value ▼

Optimized Term #3 ▼

Click on the link in cell **Code** with the value **DAY**

RENTAL SETUP WIZARD

Please provide the Rental Periods to be used when optimizing.

Optimized Term #1 ▼

Optimized Term #2 ▼

Optimized Term #3 ▼

Code ↑	Description
→ DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	

Click on the field **Optimized Term #2**

RENTAL SETUP WIZARD

Please provide the Rental Periods to be used when optimizing.

Optimized Term #1 DAY ▼

Optimized Term #2 ▼

Optimized Term #3 ▼

Click on the link in cell **Code** with the value **WEEK**

RENTAL SETUP WIZARD

Please provide the Rental Periods to be used when optimizing.

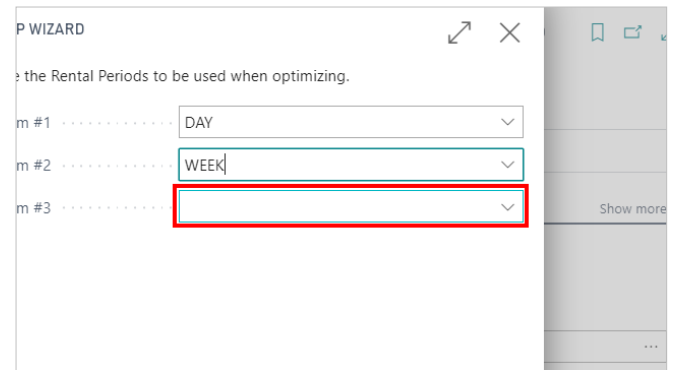
Optimized Term #1 DAY ▼

Optimized Term #2 ▼

Optimized Term #3 ▼

Code ↑	Description
→ DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	

Click on the field **Optimized Term #3**



P WIZARD

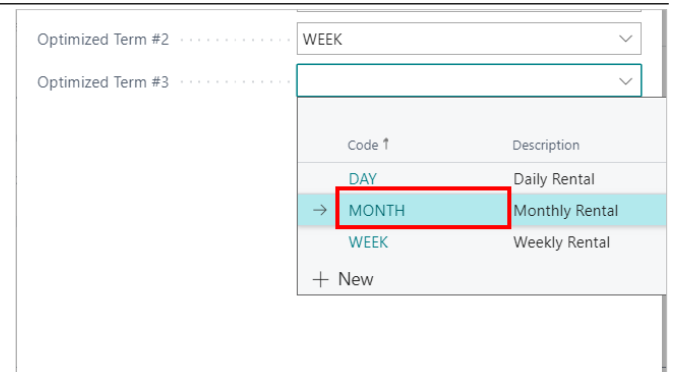
the Rental Periods to be used when optimizing.

m #1 DAY

m #2 WEEK

m #3

Click on the link in cell **Code** with the value **MONTH**

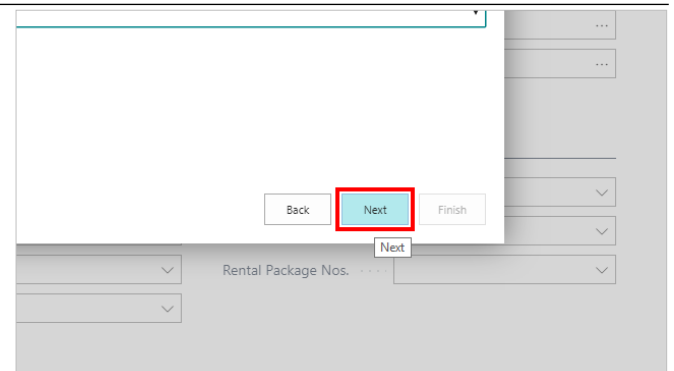


Optimized Term #2 WEEK

Optimized Term #3

Code ↑	Description
DAY	Daily Rental
→ MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	

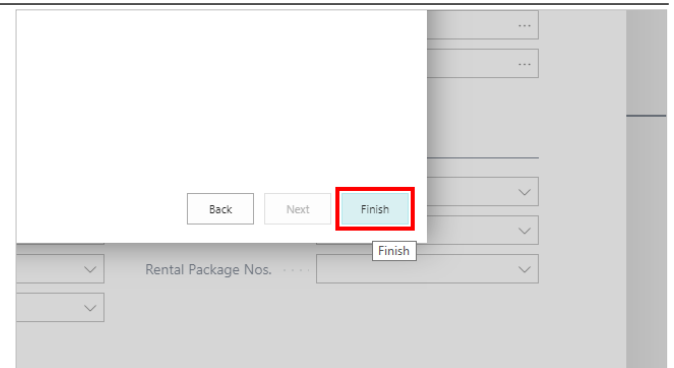
Click on the button **Next**



Back Next Finish

Rental Package Nos.

Click on the button **Finish**



Back Next Finish

Rental Package Nos.

2.3. Financial Setups for Rentals

2.3.1. How to Set Up Posting Groups for Rentals

2.3.1.1. Overview

In the General Posting Setup window, you specify how you want to set up combinations of general business and general product posting groups. Posting groups map entities like customers, vendors, items,



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resources, and sales and purchase documents to general ledger accounts. You fill in a line for each combination of business posting group and product posting group. For more information, see Dynamics 365 Business Central help - Posting Group Setups.

Rental related account fields have been added to the General Posting Setup and must be populated with a valid G/L Account in order to process rental invoices. These accounts must be created or exist in the chart of accounts for rentals to make it available to select here. Refer to Dynamics 365 Business Central help to learn about the creation of G/L Accounts.

Each combinations of General Business Posting Group and General Product Posting Group to which rentals apply require the Rental Account, and if applicable, the Damage Waiver Account fields to be filled in.

In addition, should the organization sub rent product to rent out to their customers, then the field, Sub Rental Purchase Acc. No., must be populated with an expense G/L Account to which sub contracted product is to be posted to.

For information on Sub Contracting Rental Units, go to the ODT Rental Online Help, Additional Rental Processes, Sub Contracting Rental Units.

Should the organization bill or track rentals based on metered usage, then the field, Metered Usage Account, must be populated with the revenue account to which the metered usage revenue is to be posted to.

For information on Metered Usage, go to the ODT Rental Online Help, Additional Rental Processes, Metered Usage.

You can either add the Rental Accounts to the existing General Posting Setups or create a new General Product Posting Group and new General Posting Setup combinations in which to setup the Rental Accounts.

Refer to Dynamics 365 Business Central help to learn about the creation of General Product Posting Groups and General Posting Setup records.

NOTE:

When an organization is using Rental Packages, then the Customer Posting Group(s) requires setup configuration for rentals.

To learn about the configuration of the Customer Posting Group for Rental Packages, see ODT Rental Online help, Processing Rentals, Additional Processes, Rental Packages.

NOTE:

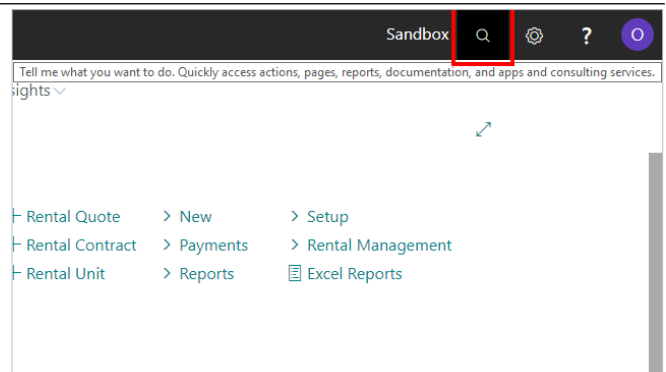
When an organization is using the Accrual Journal feature for accruing rental revenue, and opts to include the deferring of rental revenue, there are additional setup required on the General Posting Setup and the Customer Posting Groups.

To learn about the additional fields to be setup for the accruals and deferrals, see ODT Rental Online help, Processing Rentals, Additional Processes, Rental Accruals and Deferrals.

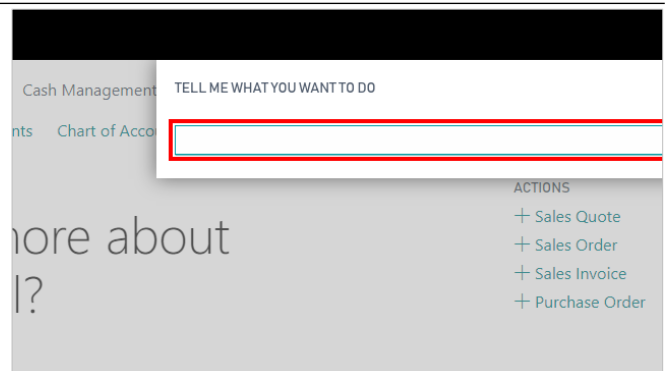
2.3.1.2. How to Add Rental Accounts to Existing General Posting Setups

The following example demonstrates the entry of G/L Accounts for the basic rental related fields on the General Posting Setup.

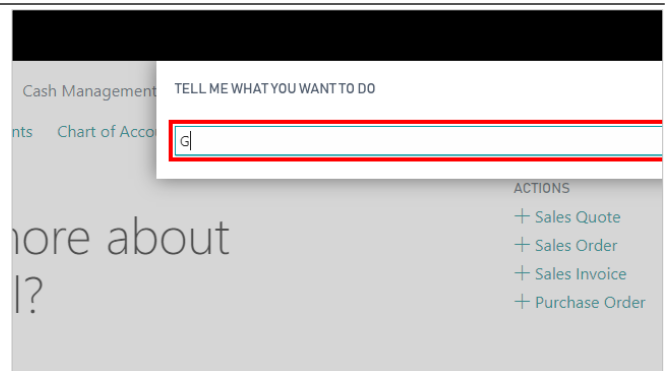
Click on the link



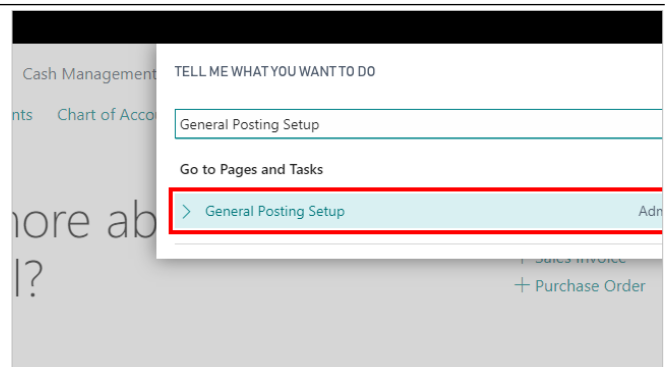
Click on the field **Type to start search:**



Enter the text **General Posting Setup**.



Click on **General Posting Setup Administration**





ODT Rentals Online Help

Click on the cell **Gen. Bus. Posting Group**

Select a record to which applies to rentals.

GEN. BUS. POSTING GROUP	GEN. PROD. POSTING GROUP	DESCRIPTION
	NO TAX	
	RETAIL	
DOMESTIC	NO TAX	
DOMESTIC	RETAIL	
DOMESTIC	SERVICES	

Click on the cell **Rental Account**

DIRECT COST APPLIED ACCOUNT	OVERHEAD APPLIED ACCOUNT	PURCHASE VARIANCE ACCOUNT	RENTAL ACCOUNT	DAMAGE WAIVER ACCOUNT	SUB RENTAL PURCHASE ACC. NO.
10700	10700				
10700	10700				
10700	10700				
10700	10700				
10700	10700				

Click on **No. = 40100, Name = Income, Services, Income/Balance = 0**

Enter or look up and select the G/L Account to which rental revenue is to be posted to.

For this example, enter G/L Account 40100.

0700	10700				
0700	10700				
0700	10700				
0700	10700				
0700	10700				

NO.	NAME	IN
40001	INCOME	In
40100	Income, Services	In
40200	Income, Product Sales	In
40250	Job Sales	In
40300	Sales Discounts	In
40400	Sales Returns & Allowances	In
+ New		

Click on the cell **Damage Waiver Account**

OVERHEAD APPLIED ACCOUNT	PURCHASE VARIANCE ACCOUNT	RENTAL ACCOUNT	DAMAGE WAIVER ACCOUNT	SUB RENTAL PURCHASE ACC. NO.
10700				
10700				
10700				
10700		40100		
10700				



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Click on the link in cell **No.** with the value **40100**

If the organization uses Metered Usage, for either billing or maintenance tracking, then the Metered Usage Account field will need to have the G/L Account entered to which the Metered Usage revenue is to be posted to. Otherwise, leave this field blank.

700	10700			
700	10700			
700	10700			
700	10700			
700	10700			
700	10700			
700	10700			
			No.	Name
			30300	Distributions to Shareholders
			30990	TOTAL LIABILITIES
			40000	INCOME STATEMENT
			40001	INCOME
			→ 40100	Income, Services
			Select record "40100" Product Sales	
			+ New	

Click on the cell **Periodic Usage Account**

Damage Waiver Account	Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100	40100	
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
			Look up value	

Click on the link in cell **No.** with the value **40100**

If the organization uses Periodic Usage pricing, then the Periodic Usage Account field will need to have the G/L Account entered to which the Periodic Usage revenue is to be posted to. Otherwise, leave this field blank.

10700			40100	40100	50100	40
10700						
10700						
10700						
			No.	Name		
			30300	Distributions to Shareholders		Ba
			30990	TOTAL LIABILITIES		Ba
			40000	INCOME STATEMENT		In
			40001	INCOME		In
			40100	Income, Services		In
			4020	Select record "40100" Product Sales		In
			+ New			

Click on the cell **Standby Charge Account**

Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account
50100	40100		
50100	40100		
50100	40100		
50100	40100	40100	
50100	40100		
50100	40100		
50100	40100		
50100	40100		
		Look up value	

Click on the link in cell **No.** with the value **40100**

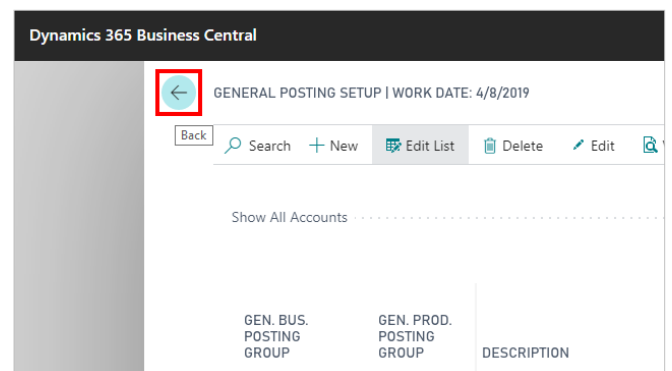
If the organization uses Standby Charges in conjunction with Periodic Usage, then the Standby Charge Account field will need to have the G/L Account entered to which the Standby Charge revenue is to be posted to. Otherwise, leave this field blank.

		40100	40100	50100	40100	
		40100	40100	50100	40100	
		40100	40100	50100	40100	
		40100	40100	50100	40100	40
		40100				
		40100				
		40100				
		40100				

No.	Name	Inc
40100	Income, Services	In
402	Select record "40100"	Product Sales
40250	Job Sales	In
40300	Sales Discounts	In
40400	Sales Returns & Allowances	In
+ New		

Repeat the above steps for each General Posting Setup record that the Rental G/L Accounts will need to be set up on.

Click on the back button



2.3.2. How to Set Up No. Series for Rentals

2.3.2.1. Overview

The No. Series required for rental documents may include the following types of documents:

Rental Quote – The system will use this number series to assign the quote number when a new Rental quote is created. This number series is only needed if rental quotes will be used. If preferred, the same No. Series used for Sales Quotes can be used.

Rental Contract - The system will use this number series to assign the contract number when a new rental contract is created. If preferred, the same No. Series used for Sales Orders can be used for Rental Contracts.

Rental Invoice - The system will use this number series to assign an invoice number to the rental invoice when the invoice is posted. If preferred, the same No. Series used for Sales Invoices can be used.

Rental Delivery - The system will use this number series to assign a document number to the delivery documents, when the delivery is posted.

Rental Return - The system will use this number series to assign a document number to the return documents when the return is posted.

Rental Units - The system will use this number series to assign a unit number to the rental unit when a new rental unit is created.

Rental Packages - The system can use this number series to assign a rental package number to packages, when a new rental package is created.

The setup of the No. Series for rental packages is included in the help for rental packages in the ODT Rental Online Help in the Additional Process category - Rental Packages.



The following two fields are used in conjunction with Rental FA Transfer Journal, and are required, when Fixed Assets are linked to a Rental Units.

Rental FA Trans. Shipment Nos. - The system will use this number series to assign a document number, to the fixed asset transfer shipment document created when posting a Rental FA Transfer Journal, or when returning a rental unit linked to a fixed asset to a different or temporary location than shipped from.

Rental FA Trans. Receipt Nos. - The system will use this number series to assign a document number, to the fixed asset transfer receipt document created when posting a Rental FA Transfer Journal, or when returning a rental unit linked to a fixed asset to a different or temporary location than shipped from.

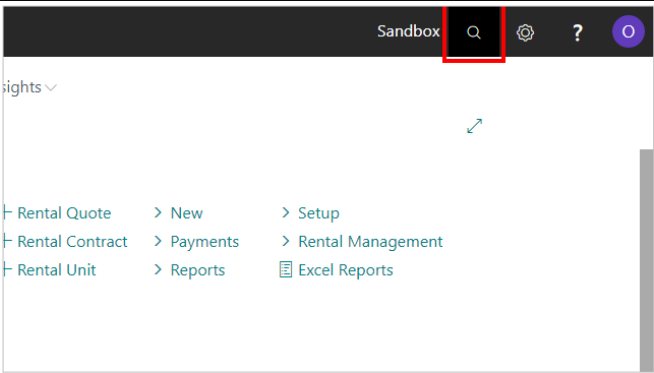
Rental Accrual Nos. - These numbers are used for automatically assigning the Document No. on the accrual journal lines created when calculating the rental revenue accrual amounts, and if applicable, rental revenue deferral amounts.

Rental Rapid Return - The system will use this No. Series when creating new Rental Rapid Return documents.

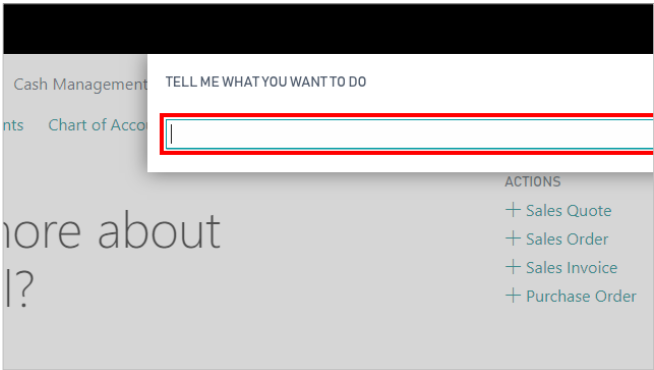
2.3.2.2. Steps to Set Up No. Series for Rentals

The following example demonstrates the setup of the No. Series for Rental Quotes.

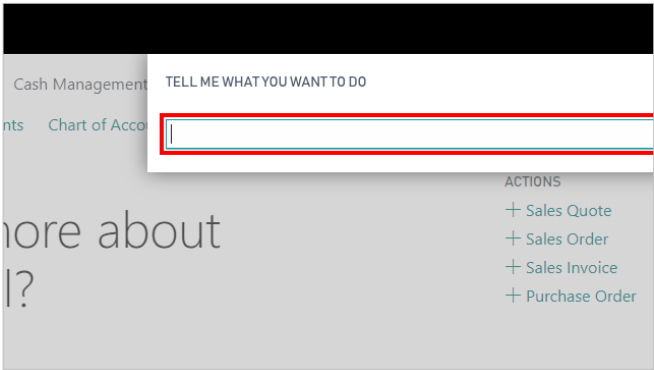
Click on the link



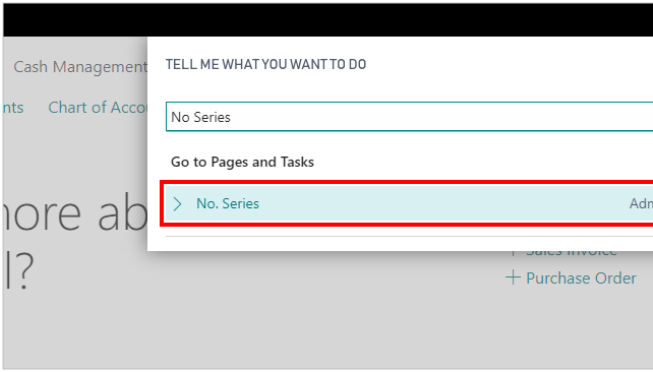
Click on the field **Type to start search:**



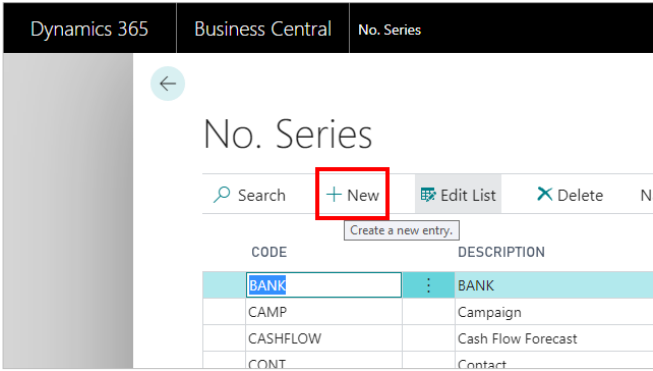
Enter the text **No Series**.



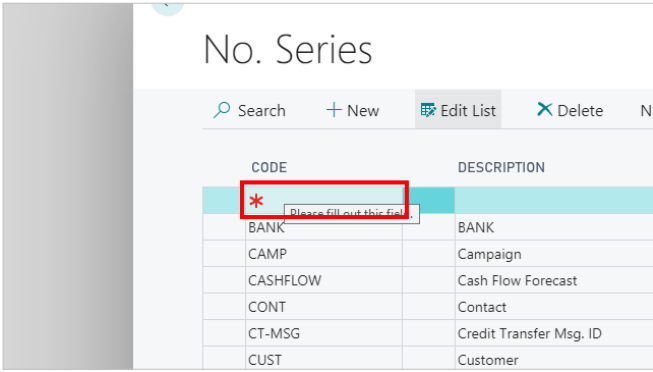
Click on **No. Series Administration**



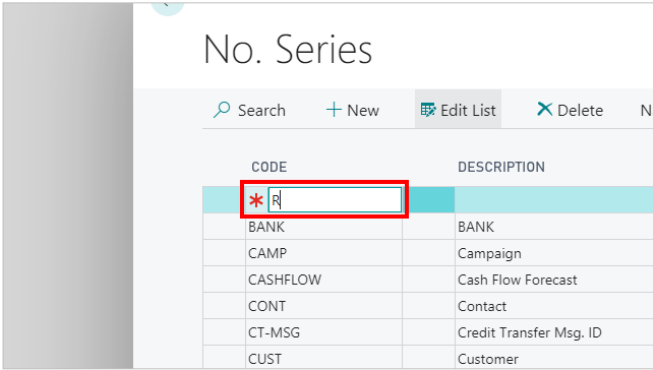
Click on the navigation menu item **New**



Click on the cell **Code**



Enter the text **Rent-Qte.**





Click on the cell **Description**

No. Series

Search

+ New

Edit List

Delete

Navigate

Open in Excel

CODE	DESCRIPTION	STATUS
* Rent-Qte		
BANK	BANK	B
CAMP	Campaign	C
CASHFLOW	Cash Flow Forecast	C
CONT	Contact	C
CT-MSG	Credit Transfer Msg. ID	1
CUST	Customer	C

Enter the text **Rental Quotes**.

No. Series

Search

+ New

Edit List

Delete

Navigate

Open in Excel

CODE	DESCRIPTION	STATUS
RENT-QTE		
BANK	BANK	B
CAMP	Campaign	C
CASHFLOW	Cash Flow Forecast	C
CONT	Contact	C
CT-MSG	Credit Transfer Msg. ID	1
CUST	Customer	C

Click on **Default Nos.**

DATE USED	LAST NO. USED	DEFAULT NOS.	MANUAL NOS.	DATE ORDER
	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	CT000022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on the navigation menu item popup **Navigate**

No. Series

+ New

Edit List

Delete

Navigate

Open in Excel

Navigate

Relationships

	⋮	Rental Quotes	-	-
		BANK	B010	B9
		Campaign	CP0001	CP
		Cash Flow Forecast	CF000001	



Click on the navigation menu item **Lines**

The screenshot shows the 'No. Series' screen in Dynamics 365. At the top, there are tabs for 'No. Series', 'Business Central', and 'Accounts'. Below the tabs, there is a search bar and buttons for '+ New', 'Edit List', and 'Delete'. A 'Lines' button is highlighted with a red box. Below the 'Lines' button, there is a table with the following data:

RENT-QTE	Rental Quotes
BANK	BANK
CAMP	Campaign
CASHFLOW	Cash Flow Forecast
CONT	Contact

Click on the cell **Starting No.**

The screenshot shows the 'No. Series Lines' screen in Dynamics 365. At the top, there are tabs for 'No. Series Lines', 'Business Central', and 'Accounts'. Below the tabs, there is a search bar and buttons for '+ New', 'Edit List', 'Delete', and 'Open in Excel'. Below the buttons, there is a table with the following data:

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED

Enter the text **RQ00001**.

The screenshot shows the 'No. Series Lines' screen in Dynamics 365. At the top, there are tabs for 'No. Series Lines', 'Business Central', and 'Accounts'. Below the tabs, there is a search bar and buttons for '+ New', 'Edit List', 'Delete', and 'Open in Excel'. Below the buttons, there is a table with the following data:

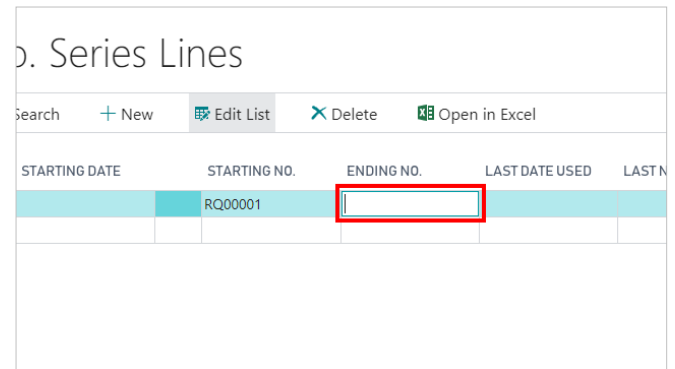
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED

Click on the cell **Ending No.**

The screenshot shows the 'No. Series Lines' screen in Dynamics 365. At the top, there are tabs for 'No. Series Lines', 'Business Central', and 'Accounts'. Below the tabs, there is a search bar and buttons for '+ New', 'Edit List', 'Delete', and 'Open in Excel'. Below the buttons, there is a table with the following data:

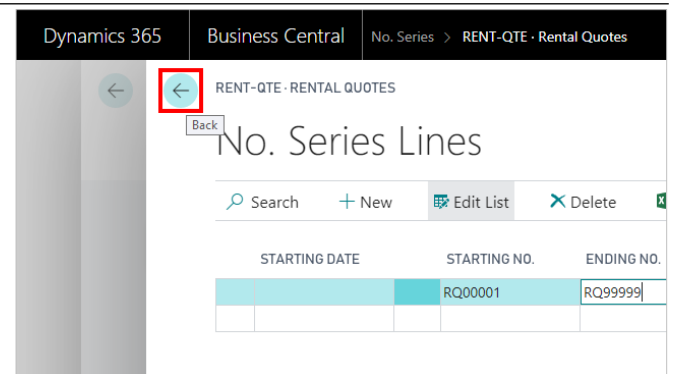
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST N
	RQ00001			

Enter the text **RQ99999**.



STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST N
	RQ00001			

Click on the button **Back**



Dynamic 365 Business Central No. Series > RENT-QTE - Rental Quotes

← RENT-QTE - RENTAL QUOTES

Back

No. Series Lines

Search + New Edit List Delete

STARTING DATE	STARTING NO.	ENDING NO.
	RQ00001	RQ99999

Repeat the above steps to create the No. Series for the Rental Contracts, Rental Invoices, Rental Deliveries, Rental Returns, Rental Units, Rental Packages and Rental Units.

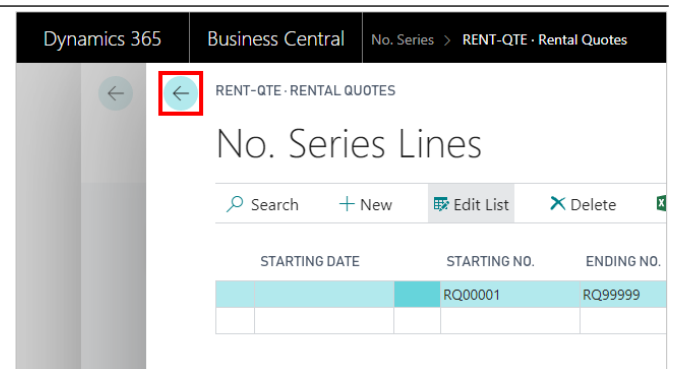
Should your organization be linking Fixed Assets to Rental Units, then repeat the above steps to create the No. Series for the FA Trans. Shipments and FA Trans. Receipt documents.

If your organization is going to use the Rental Accruals and Deferral feature, then repeat the steps above to create a No. Series for the Rental Accrual Journal document numbers.

If your organization is going to use the Rental Rapid Returns feature, then repeat the steps above to create a No. Series for the Rental Rapid Return document numbers.

For Rental Units if you wish to use varying codes instead of the default No. Series, you will need to check the Manual Nos. field.

Click on the button **Back**



Dynamic 365 Business Central No. Series > RENT-QTE - Rental Quotes

← RENT-QTE - RENTAL QUOTES

No. Series Lines

Search + New Edit List Delete

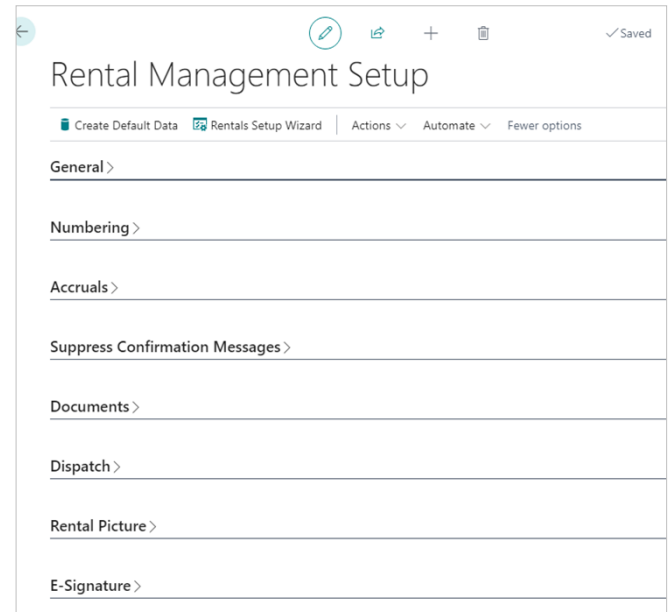
STARTING DATE	STARTING NO.	ENDING NO.
	RQ00001	RQ99999

2.3.3. How to Set Up Rental Management Setup

2.3.3.1. Overview

The Rental Management Setup defines certain basic rules to be used in the Rental Management application area.

Rental Management Setup Tabs

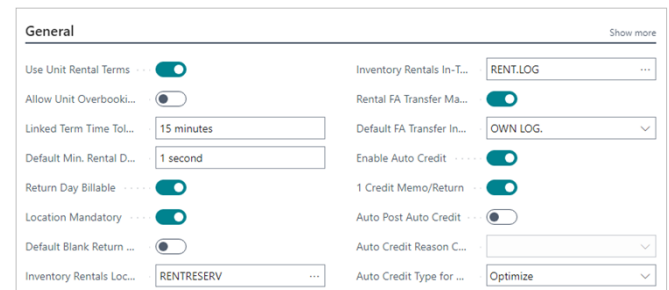


The screenshot shows the 'Rental Management Setup' window. At the top, there's a 'Saved' status. Below the title, there are tabs: 'Create Default Data', 'Rentals Setup Wizard' (active), 'Actions', 'Automate', and 'Fewer options'. The main area lists several setup categories with expandable arrows: General, Numbering, Accruals, Suppress Confirmation Messages, Documents, Dispatch, Rental Picture, and E-Signature.

2.3.3.2. General Tab

On the General Fast Tab, you specify various options as they apply to your organization.

Fields Shown by Default



The screenshot shows the 'General' tab settings. It includes a 'Show more' link. The settings are organized into two columns. The left column contains: 'Use Unit Rental Terms' (toggle on), 'Allow Unit Overbook...' (toggle off), 'Linked Term Time Tol...' (15 minutes), 'Default Min. Rental D...' (1 second), 'Return Day Billable' (toggle on), 'Location Mandatory' (toggle on), 'Default Blank Return ...' (toggle off), and 'Inventory Rentals Loc...' (RENTRESERV). The right column contains: 'Inventory Rentals In-T...' (RENT.LOG), 'Rental FA Transfer Ma...' (toggle on), 'Default FA Transfer In...' (OWN LOG.), 'Enable Auto Credit' (toggle on), '1 Credit Memo/Return' (toggle on), 'Auto Post Auto Credit' (toggle off), 'Auto Credit Reason C...' (dropdown), and 'Auto Credit Type for ...' (Optimize).

The following provides a brief overview of the fields which are shown by default.

Use Unit Rental Terms: This field is used to specify whether or not to use the Rental Terms specified on the Rental Units during quote or contract entry. When enabled, if a Rental Term has been setup on the rental unit, group or rental package selected, then the term will default to the Rental Term field on the rental line of a quote or contract.

Allow Unit Overbooking: This field is a global option field for specifying whether or not all Rentals Units can be overbooked and/or double booked.

NOTE: The Allow Overbooking field cannot be enabled on units assigned to a group.

When the field is enabled, then a confirmation message occurs, where the user must select Yes or No. When Yes is selected then all rental units will have the field Allow Unit Overbooking enable. When the field is not enable, then an organization can select which units and groups can be overbooked on the unit cards.

Should an organization setup and configure Rental Units and groups, then change the setting of the Allow Unit Overbooking field on Rental Management Setup, the current settings on the units and groups will not be impacted. Only new units and groups will be impacted by the change.



Linked Term Time Tolerance: The Time Tolerance is field is used to specify an allowance on the time the rental units are returned, before charging the next level of rental prices applicable to the unit(s). This feature only applies to the Hybrid Hourly rental terms.

Default Min. Rental Duration: This field is used for specifying the default minimum rental duration that rental units can be rented for. The Default Min. Rental Duration can be overridden on the rental unit card.

Return Day Billable: Specifies whether the date a rental is returned is billable to the customer. This field is not applicable when rentals are tracking date and time.

Location Mandatory: The Location Mandatory field is used to specify whether Locations are mandatory, which enforces the entry of a location, specified as allowing rentals, when setting up rental units and when entering units on the rental contract lines in order to ship units.

It is recommended that the setup of Locations as allowing rentals to be done before specifying that locations are mandatory. Please see the How to Setup Locations for Rentals for information on how to do this.

Default Blank Return Date: This field is used to specify whether or not the Rental Return Date is to be blank on the Rental Lines on rental quotes and invoices. This option is mainly used when an organization has open-ended rentals, in which an expected return date is unknown.

Inventory Rentals Location: The Inventory Rentals Location is mandatory when linking units to item. A user defined, on rent, Location must be setup and populate this field as it is used to create and post transfer orders when units are reserved/shipped and returned. Thus, ensuring the Item Availability is updated to display the items, which are available for rent or sale or out on rent.

Inventory Rentals In-Transit Location: The Inventory Rentals In-Transit Location is enabled when the Inventory Setup has the field, Location Mandatory, checked. When enabled, this field is mandatory as an In-Transit location is then used when transferring items. A user defined, Rentals In-Transit Location must be setup and populate this field.

For additional information on the Inventory Rentals Location and the Inventory Rentals In-Transit Location fields and their functionality, please see the ODT Rentals Online Help, Setup Rentals category for Setup Rental Locations and Setup Rental Units - Rental Units Overview.

Rental FA Transfer Mandatory: The Rental FA Transfer Mandatory is used to specify whether the transfer of fixed assets between rental locations is mandatory, when shipping/returning rental units linked to fixed assets.

Default FA Transfer In-Transit: The Default FA Transfer In-Transit field is used to specify a default in-transit location to be used for the transfer of fixed assets between rental locations, when returning rental units linked to fixed assets. The specified in-transit location also defaults to the journal, when transferring a FA linked to a rental unit, from one rental location to another.

Auto Credit Memo Fields: To learn about the fields, Enable Auto Credit, Auto Post Auto Credit, Auto Credit Reason Code and Auto Credit Type for Opt, please see the ODT Rental Online Help, Processing Rentals, Rental Credit Memos, Rental Auto Credit Memos.

Fields Displayed when select Show more:

The following provides a brief overview of the additional rental fields which are displayed when Show more is selected.

Rental Transaction Count, which displays the number of rental invoices that have been posted.

Default Rental Calendar, which is required for Periodic Usage and Standby Charges feature and the Rental Custom Calendar billing feature.

To learn about these fields, please see ODT Rentals Online Help, Additional Rental Processes, Periodic Usage and Standby Charges, and Rental Custom Calendar.

Verify Insurance Certificate, which is used with the Certificates of Insurance Tracking feature.

To learn about the feature and this field, please see ODT Rentals Online Help, Processing Rental, Additional Rental Processes, Certificate of Insurance Tracking.

Billing Cycle fields, including Billing Cycle Type, Default Invoicing Period Code, Billing Cycle Day, and Billing Cycle Tolerance fields are a part of the Billing Cycles feature.

To learn about this feature and these fields, please see ODT Rentals Online Help, Processing Rentals, Rental Contracts Using Billing Cycles.

The Advanced Pro-Forma fields, Advanced Pro-Forma and Check Proforma on Posting are used with the Advanced Pro-Forma feature.

To learn about this feature and these fields, please see ODT Rentals Online Help, Additional Rental Processes, Advanced Proforma Invoice.

Shortage Cues Visible, which when enabled will display two Rental Shortages Cues, Rental Contracts - Shortages and Shortages on the Business Manager and Sales Order Processor role centers.

To learn about the Shortage Cues, please see ODT Rentals Online Help, Additional Rental Processes, Reconcile Rental Quantities.

Default Calendar Period: This field is used to specify a default period code to calculate the number of days to display on the rental period view of the rental documents' availability calendar, when a rental term is not specified on the rental document header.

Default Qty. to Rent: Is used to specify whether the Qty. to Rent on the rental lines is to be set to blank or the remaining quantity when a partial shipment is done on units not assigned to groups and the Allow Overbooking is enabled.

Advanced Sales Line Shipping: This field is used to specify whether or not a sales order is created when sales lines are created on a rental contract. If enabled, then when run ship rentals the sales lines are shipped on both the sales order and the contract. If disabled, then a sales order is not created, and the sales lines are shipped when the rental contract is invoiced.

2.3.3.3. Numbering Tab

On the Numbering tab, you specify the number series that will be used for rental units, rental packages, FA transfers, accrual journals, rental rapid return, and rental documents.

Numbering Tab

Numbering				
Rental Quote Nos.	RENT-QTE	▼	Rental Package Nos.	RENT-PKG
Rental Contract Nos.	RENT-COAT	▼	Rental EA Trans. Shipment Nos.	RENT-EAS
Rental Invoice Nos.	RENT-INW	▼	Rental EA Trans. Receipt Nos.	RENT-EAR
Rental Delivery Nos.	RENT-DOL	▼	Rental Aerial Journal Nos.	RENT-ACC
Rental Return Nos.	RENT-RTN	▼	Rental Rapid Return Nos.	RAPID RETURNS
Rental Unit Nos.	RENT-UNIT	▼		

2.3.3.4. Accruals Tab

The Accruals tab contains options related to the Rental Accrual and Deferral feature.

To learn about these fields, please see ODT Rental Online Help, Additional Rental Processes, Rental Accruals and Deferrals.

Accruals Tab

Accruals	
Accrue Periodic %	80.00
Accrue Standby %	20.00

Reversal Date Calculation: First Day of Accrual

Calculate Deferred Reversal: ☒

2.3.3.5. Suppress Messages Tab

The Suppress Confirmation Messages tab contains options for specifying whether the following pop-up



messages are to be suppressed.

Suppress Messages Tab

Suppress Confirmation Messages	
Suppress Confirm No Price Setup	<input type="checkbox"/>
Suppress Confirm Early Return	<input type="checkbox"/>
Suppress Confirm Partial Return	<input type="checkbox"/>
Suppress Confirm Zero Price	<input type="checkbox"/>
Suppress Confirm Posting Date	<input type="checkbox"/>

- **Suppress Confirm No Price Setup**, which when enabled stops the confirmation message from being displayed when a rental term is selected on the rental line when the rental unit does not have a price card for that term.
- **Suppress Confirm Early Return**, which when enabled stops the confirmation message from being displayed when the user enters a return date earlier than the last invoiced date.
- **Suppress Confirm Partial Return**, which when enabled stops the confirmation message from being displayed when the user enters a return quantity that is less than the quantity on rent.
- **Suppress Confirm Zero Price**, which when enabled stops the confirmation message from being displayed when invoicing and the Rental Unit Price on one or more lines is not populated.
- **Suppress Confirm Early Return**, which when enabled stops the confirmation message from being displayed when the user enters a return date earlier than the last invoiced date.

2.3.3.6. Documents Tab

Documents Tab

Documents	
Print Metered Usage Prices	<input checked="" type="checkbox"/>
Metered Usage 1 Label	Level 1
Metered Usage 2 Label	Level 2
Metered Usage 3 Label	Level 3
Additional Fee Name	Enrich Fee
Print Periodic Usage/Standby Prices	<input checked="" type="checkbox"/>
Periodic Usage Label	Days in Use
Standby Usage Label	Days on Standby
Hide PO Details on Invoice	<input type="checkbox"/>
Signature	
Transfer Signature On Adv. Proforma Post	<input checked="" type="checkbox"/>
Terms & Conditions	
Rental Terms & Conditions	<input checked="" type="checkbox"/>
Show Group Details on Quote	<input type="checkbox"/>

On the Documents tab, when an organization is using Metered Usage pricing and/or Periodic Usage and Standby Charge pricing, then the preferred labelling can be specified for how these print on rental documents.

For information on setting up the Document tab, please see ODT Rental Online Help, Additional Rental Processes, Metered Usage, and/or Periodic Usage and Standby Charges.

Transfer Signature On Advanced Proforma Post, which when is enabled and a company is using the Advanced Proforma feature, if there are signatures captured on the Advanced Proforma Invoice, then the signatures will be transferred to the Posted Sales Invoice.

For information on Electronic Signatures, please see ODT Rental Online Help, Additional Rental Processes, Electronic Signatures.

Rental Terms & Conditions, which when enabled specifies that a terms and conditions attachment can be printed with the rental quote and contract reports and linked to the email when send or email the quote or contract.

Show Group Details on Quote, which when disabled specifies that the groups' child units details are not to print on the report when the Show Rental Details is enabled. The group, group qty., group total price, and the pricing details will print at the group level.

2.3.3.7. Dispatch Tab

The Dispatch tab is used to activate the Rentals Dispatch feature and set defaults related to dispatch.

NOTE:

The User Help for Dispatch is in progress at this time.



Dispatch Tab

Dispatch

Dispatch Setup

Dispatch Delivery No...

Dispatch Pickup No...

Rental Post Option

Update Requested D...

Update Requested Pi...

Dimension Unit

Weight Unit

Unit Conversion Rou...

Business Hrs Start

Business Hrs End

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

2.3.3.8. Rental Picture Tab

The Rental Picture Tab is for specifying the settings for taking and the storing of rental pictures on the Posted Rental Delivery and Posted Rental Return documents.

NOTE:
The User Help is in progress at this time.

Rental Picture Tab

Rental Picture

Send Picture to Onlin...

Thumbnail Size

Online Drive Connector

Online Drive Folder

2.3.3.9. E-Signature Tab

E-Signature Tab

E-Signature

E-Signature Connector

E-Signature Setting

Archive File Connector

Archive Folder

2.3.3.10. Menu Options

On the Rental Management Setup menu options under Actions, Setup provides menu option for setting up Rental Periods, Rental Terms, Rental Categories, Rental Attributes, and Terms and Conditions.

There also is an option called Time Zone which is used when an organization is processing rentals across time zones.

The listing of Time Zones is the same as the Dynamics 365 Business Central Time Zones. However, can be modified and new records added, if needed.

For learn about processing rentals across time zones, please see ODT Rentals Online Help, Additional Rental Processes, Processing Rentals Across Time Zones.

2.3.3.11. Steps to Set Up Rental Management Setup

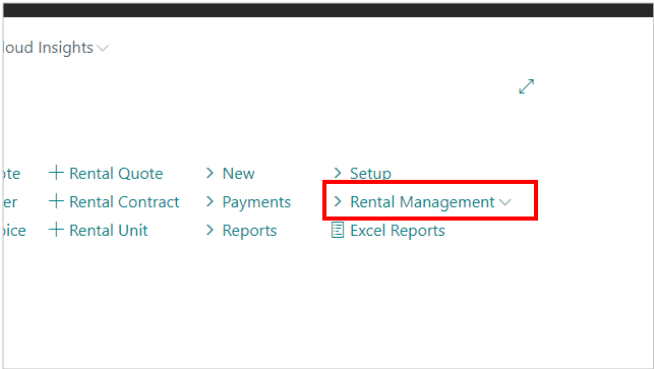
Profile - Business Manager

In the following example the fields that have the slide option, the default setting on the field is No.

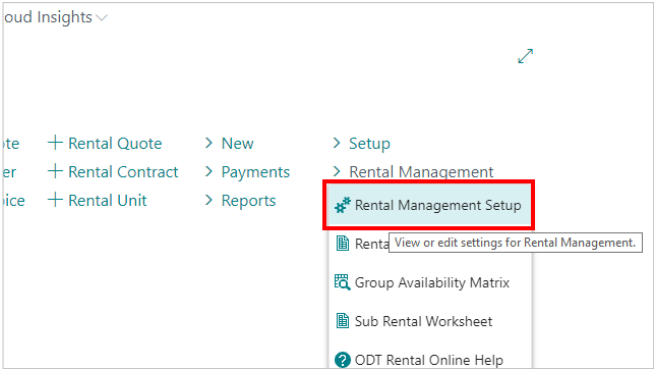
Clicking on the field will set the option to Yes.



Click on the link **Rental Management** ☐



Click on the link **Rental Management Setup**

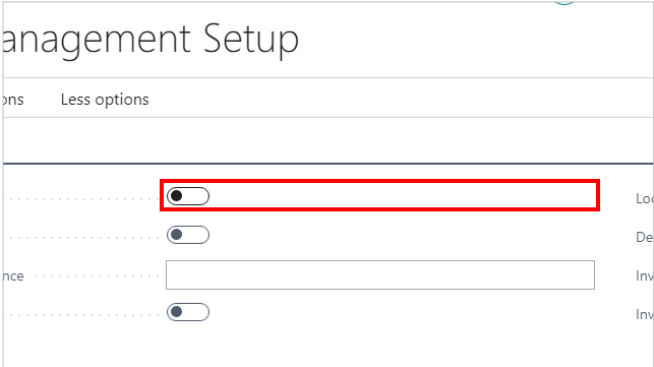


If the Rental Management Setup opens in View mode, then click on the Pencil at the top of the page to be able to edit the settings.

Click on **Use Unit Rental Terms, No**

When this field is set to Yes, then when entering a unit on a quote or contract, then when a Rental Term is specified on the unit, it will populate the Rental Term Code field on the rental line.

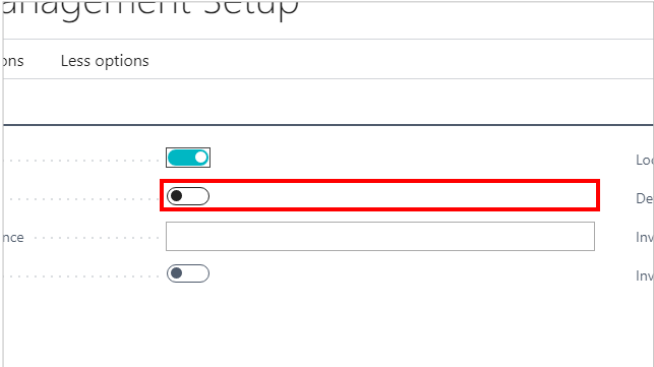
When left as No, then the Rental Term specified on a Rental Unit will not default to the Rentals lines.



However, if the Rental Terms Code field on the General tab of a quote or contract is populated either manually or has defaulted from the Customer card, then this term will automatically populate the Rental Term Code field on the rental line.

Click on **Allow Unit Overbooking, No**

When this field is set to Yes, then overbooking is allowed on all unit groups and single units not assigned to a group. The Allow Overbooking field will not be available on the Group Child Rental Unit Cards, when the field is checked on Rental Management Setup.



When left as No, then the Allow Overbooking fields will be available on the Rental Unit Cards. The settings on all unit groups and single units not assigned to a group, will be used to specify whether or not overbooking is allowed on the units.

Should a single unit not assigned to a group be linked to an Inventory Item, then the Allow Overbooking feature



will not apply to the unit. The Inventory availability will control the availability of the unit.

Click on the field **Linked Term Time Tolerance**,
(Blank)

If using Hybrid Hourly Rental Terms, where tracking rentals is based on time out and time returned, and a time tolerance is allowed on the time returned, then enter the time tolerance in this field.

Otherwise, leave this field blank.

Enter the text **15 minutes**.

Click on the field **Default Min. Rental Duration**

The setting of 1 second is the default setting and can be overridden. If the minimum rental length allowed by your organization is different, then override the setting. For example, if the minimum is one day, then enter 1 day.

Click on **Return Day Billable**, **No**

Set this field to Yes by clicking on it, if your pricing schemas include billing for the day the rental unit is returned.

Otherwise, leave this field set as No.



ODT Rentals Online Help

Click on **Location Mandatory, No**

Setting Location Mandatory to Yes will enforce the specification of a Location on the unit card, when setting up Rental Units. This feature does not apply to rental unit groups and units linked to an Inventory Item.

The screenshot shows a configuration page with a 'Show more' link at the top right. Below it, there are several fields. The first field is a toggle switch labeled 'Location Mandatory' which is currently set to 'No' (the 'No' side is selected). This field is highlighted with a red rectangular box. Below this are other fields, including a dropdown menu and a text input field, both with ellipsis (...) indicating they are expandable.

Click on **Default Blank Return Date, No**

When checked, the Rental Return Date field will be blank when entering Rental Lines.

When not checked, then the Rental Return Date will automatically be populated based on the length or duration of single rental period of the Rental Period specified on the Rental Term card for the term on the line. The Rental Return Date can be overridden or blanked, if desired.

The screenshot shows a configuration page with a 'Show more' link at the top right. Below it, there are several fields. The first field is a toggle switch labeled 'Default Blank Return Date' which is currently set to 'No' (the 'No' side is selected). This field is highlighted with a red rectangular box. Below this are other fields, including a dropdown menu and a text input field, both with ellipsis (...) indicating they are expandable.

Click on the field **Inventory Rentals Location, (Blank)**

Should an organization be going to link Rental Units to Inventory Items and is using Locations, then this field is mandatory. A user defined "on rent" Location must be setup and selected in this field.

For information on setting up the Location, see the ODT Rentals Online Help in the Setup Rentals - Setup Rental Locations.

Otherwise, leave this field blank.

The screenshot shows a configuration page with a 'Show more' link at the top right. Below it, there are several fields. The first field is a toggle switch labeled 'Inventory Rentals Location' which is currently set to 'Yes' (the 'Yes' side is selected). Below this is a dropdown menu labeled 'Inventory Rentals Location' which is currently blank. This field is highlighted with a red rectangular box. Below this are other fields, including a dropdown menu and a text input field, both with ellipsis (...) indicating they are expandable.

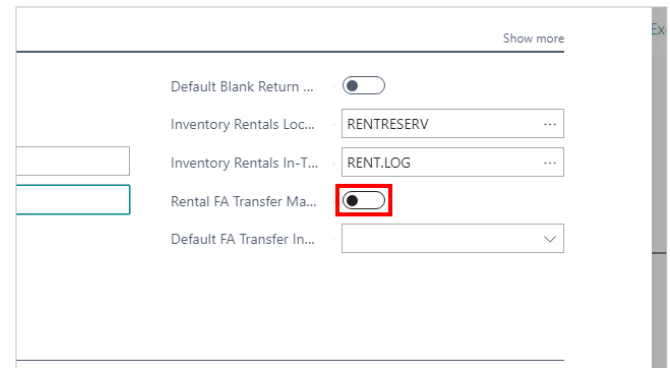
Click on the field **Inventory Rentals In-Transit Location, (Blank)**

Should the configuration of inventory be as noted in the overview, then the user defined In-Transit Location for Inventory Rentals must be specified in this field.

The screenshot shows a configuration page with a 'Show more' link at the top right. Below it, there are several fields. The first field is a toggle switch labeled 'Inventory Rentals In-Transit Location' which is currently set to 'Yes' (the 'Yes' side is selected). Below this is a dropdown menu labeled 'Inventory Rentals In-Transit Location' which is currently set to 'RENTRESERV'. This field is highlighted with a red rectangular box. Below this are other fields, including a dropdown menu and a text input field, both with ellipsis (...) indicating they are expandable.

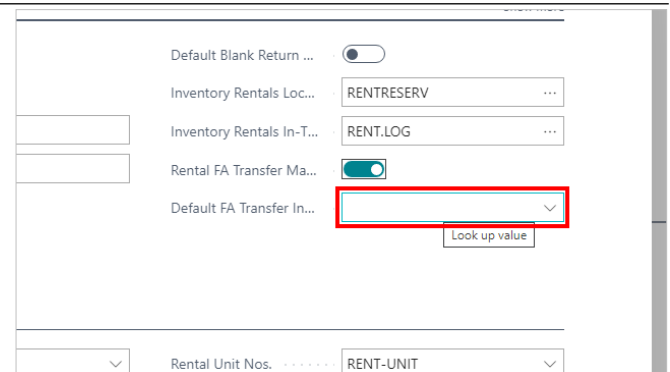
Click on the toggle field Rental FA Transfer Mandatory

To ensure that the Rental Location on the Fixed Asset card and the Rental Unit remain the same, when a unit is returned to a different or temporary location, then the Rental FA Transfer Mandatory should be enabled.



The screenshot shows a form with several fields. The 'Rental FA Transfer Ma...' field is highlighted with a red box, and its toggle switch is turned on. Other fields include 'Default Blank Return ...', 'Inventory Rentals Loc...', 'Inventory Rentals In-T...', and 'Default FA Transfer In...'.

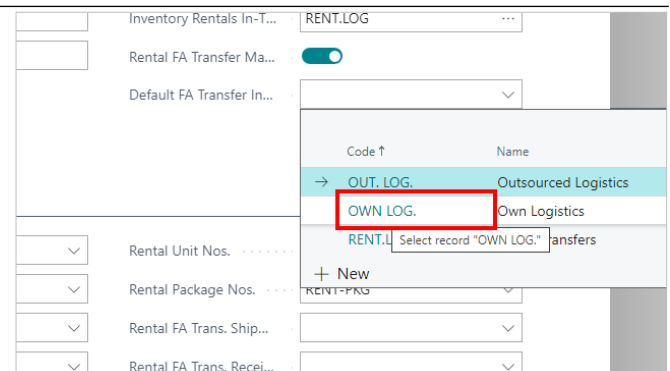
Click on the field **Default FA Transfer In-Transit Location**



The screenshot shows the 'Default FA Transfer In...' field highlighted with a red box. A 'Look up value' button is visible next to it. Other fields include 'Default Blank Return ...', 'Inventory Rentals Loc...', 'Inventory Rentals In-T...', and 'Rental FA Transfer Ma...'.

Click on the link in cell **Code** with the value **OWN LOG.**

When the Rental FA Transfer Mandatory field is enabled, then a default In-Transit Location becomes mandatory.

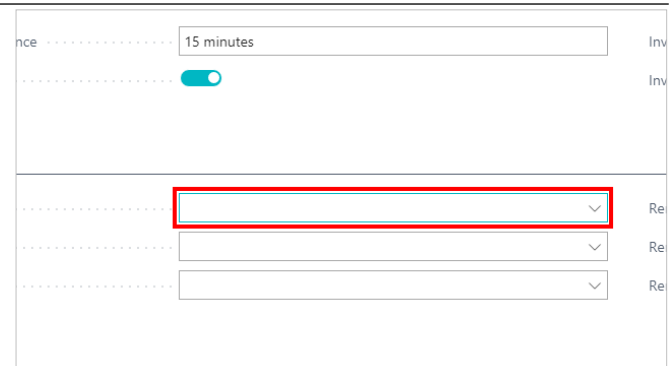


The screenshot shows a dropdown menu for the 'Code' field. The 'OWN LOG.' option is highlighted with a red box. Other options include 'OUT. LOG.' and 'RENT. LOG.'. The 'Name' column shows 'Outsourced Logistics' and 'Own Logistics'.

Click on the field **Rental Quote Nos., (Blank)**

Rental quotes are optional.

Should the organization want to use the same No. Series as the Sales Quotes, then leave this field blank.



The screenshot shows a form with a 'Rental Quote Nos., (Blank)' field highlighted with a red box. Other fields include '15 minutes', 'Inv', and 'Re'.



ODT Rentals Online Help

Click on **Code = RENT-QTE, Description = Rental Quotes**

Numbering

Rental Quote Nos.	
Rental Contract Nos.	
Rental Invoice Nos.	

CODE	DESCRIPTION
RENT-DEL	Rental Deliveries
RENT-INV	Rental Invoices
RENT-QTE	Rental Quotes
RENT-RET	Rental Returns
RENT-UNIT	Rental Units
RES	Resource

+ New

Click on the field **Rental Contract Nos., (Blank)**

Should the organization want to use the same No. Series as the Sales Orders for the Rental Contracts, then leave this field blank.

Numbering

RENT-QTE

Click on **Code = RENT-CONT, Description = Rental Contracts**

Numbering

Rental Quote Nos.	RENT-QTE	Rental Return Nos.
Rental Contract Nos.		Rental Unit Nos.
Rental Invoice Nos.		
Rental Delivery Nos.		

CODE	DESCRIPTION
RENT-CONT	Rental Contracts
RENT-DEL	Rental Deliveries
RENT-INV	Rental Invoices
RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns

+ New

Click on the field **Rental Invoice Nos., (Blank)**

Should the organization want to use the Sales Invoice No. Series for the Rental Invoices, then leave this field blank.

Numbering

RENT-QTE

RENT-CONT



ODT Rentals Online Help

Click on **Code = RENT-INV, Description = Rental Invoices**

Contract Nos.

Invoice Nos.

RENT-CONT

CODE	DESCRIPTION
RENT-DEL	Rental Deliveries
RENT-INV	Rental Invoices
<small>RENT-INV Select record "RENT-INV"</small>	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units

+ New

Click on the field **Rental Delivery Nos., (Blank)**

in

sit Location

Click on **Code = RENT-DEL, Description = Rental Deliveries**

Delivery Nos.

Return Nos.

Unit Nos.

CODE	DESCRIPTION
RENT-DEL	Rental Deliveries
<small>RENT-INV Select record "RENT-DEL"</small>	Rental Invoices
RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units

+ New

Click on the field **Rental Return Nos., (Blank)**

sit Location

RENT-DEL



ODT Rentals Online Help

Click on **Code = RENT-RTN, Description = Rental Returns**

Delivery Nos.	RENT-DEL
Return Nos.	
Unit Nos.	

CODE	DESCRIPTION
RENT-DEL	Rental Deliveries
RENT-INV	Rental Invoices
RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units
RES	Resource

+ New

Click on the field **Rental Unit Nos., (Blank)**

Delivery Nos.	RENT-DEL
Return Nos.	RENT-RTN
Unit Nos.	

Click on **Code = RENT-UNIT, Description = Rental Units**

Unit Nos.	
-----------	--

CODE	DESCRIPTION
RENT-DEL	Rental Deliveries
RENT-INV	Rental Invoices
RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units
RES	Resource

+ New

Click on the field **Rental Package Nos.**

The Rental Package Nos. field is only used when an organization is using the Rental Package feature to group rental unit groups, rental units, and standard text codes into a package for renting.

If left blank, then the No. Series setup for Rental Units will be used to assign numbers to the Rental Packages.

Delivery Nos.	RENT-RTN
Return Nos.	RENT-UNIT
Unit Nos.	

To learn about Rental Packages, please see the ODT Rental Online Help, Additional Rental Processes, Rental Packages.

ODT Rentals Online Help

Click on the field **Rental FA Trans. Shipment Nos.**

▼	Rental Unit Nos.	RENT-UNIT ▼
▼	Rental Package Nos.	RENT-PKG ▼
▼	Rental FA Trans. Ship...	▼
▼	Rental FA Trans. Recei...	Look up value ▼
▼		

Click on the link in cell **Code** with the value **RENT-FAS**

▼

Rental Package Nos.

RENT-PKG

▼

▼

Rental FA Trans. Ship...

▼

▼

Rental FA Trans. Recei...

▼

Code ↑

Description

RENT-DEL Rental Delivery

RENT-FAR Rental FA Transfer Receipt

RENT-FAS Rental FA Transfer Shipment

RENT-INV Select record "RENT-FAS" Ice

RENT-PKG Rental Packages

+ New

Days on Standby

Click on the field **Rental FA Trans. Receipt Nos.**

<input type="text"/>		
<input type="text"/>	Rental Unit Nos.	RENT-UNIT <input type="text"/>
<input type="text"/>	Rental Package Nos.	RENT-PKG <input type="text"/>
<input type="text"/>	Rental FA Trans. Ship...	RENT-FAS <input type="text"/>
<input type="text"/>	Rental FA Trans. Recei...	<input type="text"/>
<input type="text"/>		<input type="button" value="Look up value"/>

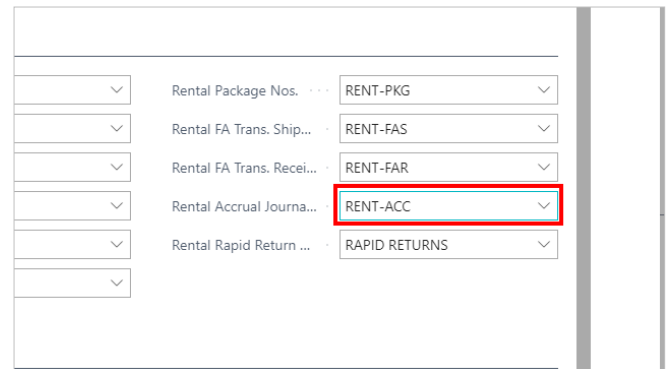
Click on the link in cell **Code** with the value **RENT-FAR**

Code ↑	Description
RENT-DEL	Rental Delivery
RENT-FAR	Rental FA Transfer Receipt
RENT-FAS	Rental FA Transfer Shipment
RENT-INV	Rental Invoice
RENT-PKG	Rental Packages
+ New	

ODT Rentals Online Help

Click on the field **Rental Accrual Journal Nos.**

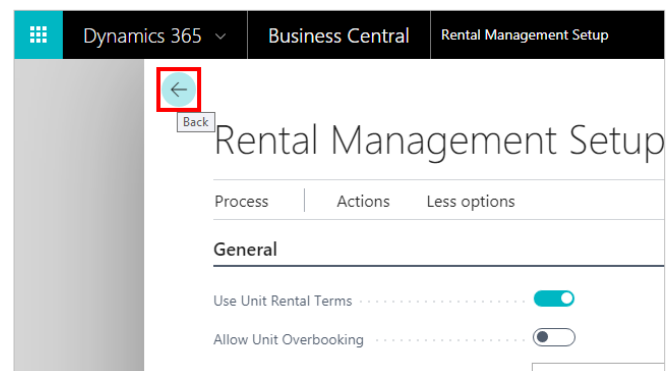
This field is used to specify the code of the number series to be used for assigning the document number on the Rental Accrual Journal.



	Rental Package Nos. . . .	RENT-PKG
	Rental FA Trans. Ship...	RENT-FAS
	Rental FA Trans. Recei...	RENT-FAR
	Rental Accrual Journa...	RENT-ACC
	Rental Rapid Return ...	RAPID RETURNS

To learn about the setting up of the Rental Rapid Returns, see ODT Rentals Online Help, Processing Rentals, Rental Rapid Returns.

Click on the back button



Dynamics 365 Business Central Rental Management Setup

Back

Rental Management Setup

Process | Actions | Less options

General

Use Unit Rental Terms ☒

Allow Unit Overbooking ☐

2.3.4. Sending and Emailing Rental Documents

2.3.4.1. Overview

ODT Rentals contains the menu options to send and/or email the rental documents, excluding the Proforma invoice.

The menu options are available on the Rental Quote, Rental Contract for the contract, delivery and returns, the Posted Rental Delivery, Posted Rental Return and Posted Rental Invoice cards. On the Rental Invoicing Worksheet for batch invoicing, the menu option of Post and Send Invoices is available.

The setups and processing of sending or emailing rental documents is the same as when sending or emailing sales documents.

With the exception that the Report Selections - Rentals is used to configure the Report ID's for the rental documents.

2.3.4.2. Setups for Sending or Emailing Rental Documents

The setups required for sending or emailing rental documents include:

- SMTP Mail Setup

The setup of the SMTP Setup is mandatory in order to email documents.

To learn about setting up the SMTP Mail Setup see the Dynamics 365 Business Central Help in the Getting Started, Setting Up Business Central, Set Up Email Central Getting Started, Setting Up Business Central, Set Up Email.

- * Report Selections – Rentals

Should an organization have custom reports for the rental documents, which are applicable to all customers, then the Report Selection - Rentals, should be configured with the custom reports.

To learn about setting up the Report Selections - Rentals, see ODT Rental Online Help, Setup Rentals, Financials Setup for Rentals, then How to Set Up Rental Report Selections.

- Document Sending Profile for Emailing documents, which is demonstrated in the following chapter.
- Setup of a Document Sending Profile on the Customer Card, which is mandatory for emailing of documents.
- Customer Card – Document Layouts, if applicable

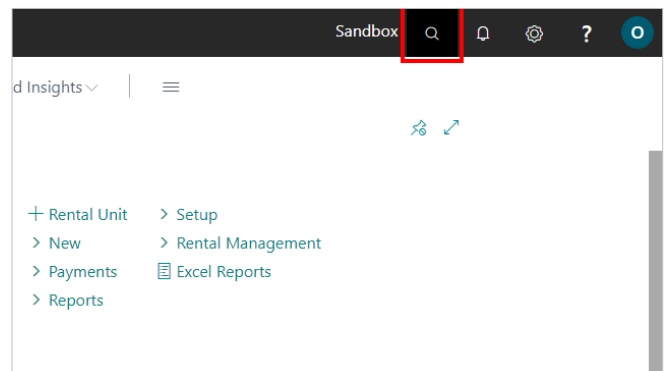
Should an organization have custom rental reports that are specific to only one or some customers, then on the Customer Card, the Document Layouts will need to be configured.

To learn about setting up a Document Sending Profile and Document Layouts on a Customer, see ODT Rental Online Help, Setup Rentals, Financials Setup for Rentals, then How to Update Customer Cards for Rentals.

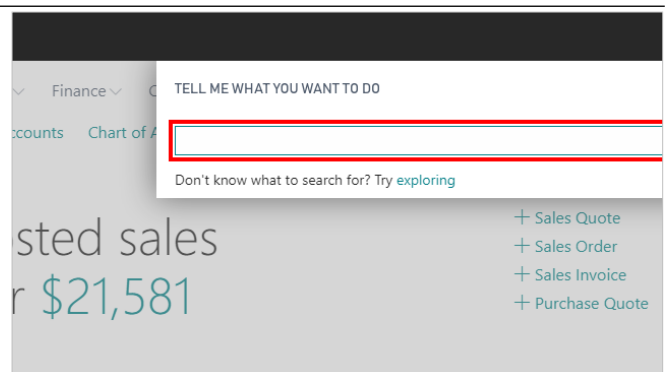
2.3.4.3. How to Setup an Email Document Sending Profile

The following demonstrates the setting up of a Document Sending Profile for sending the rental documents via the emailing or sending menu options.

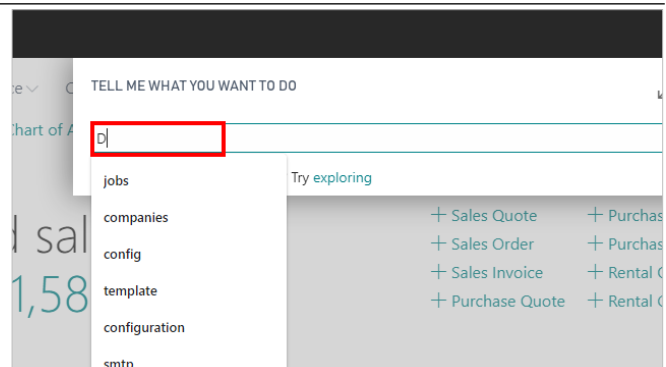
Click on the link **Search**



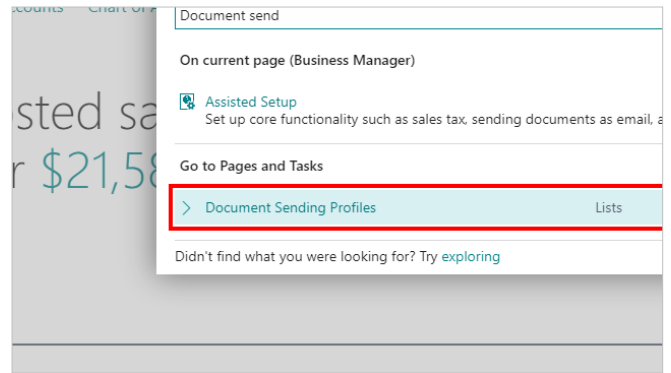
Click on the field **Type to start search:**



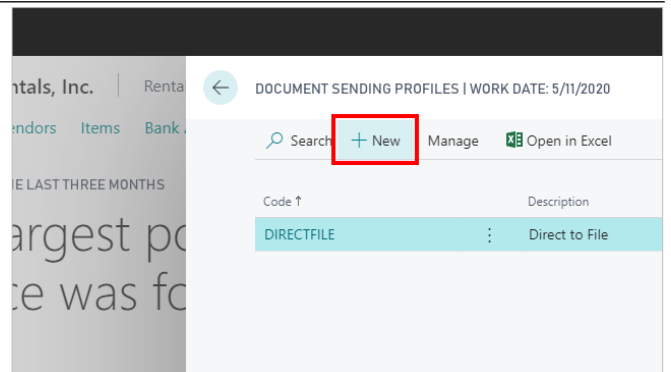
Enter the text **Document send.**



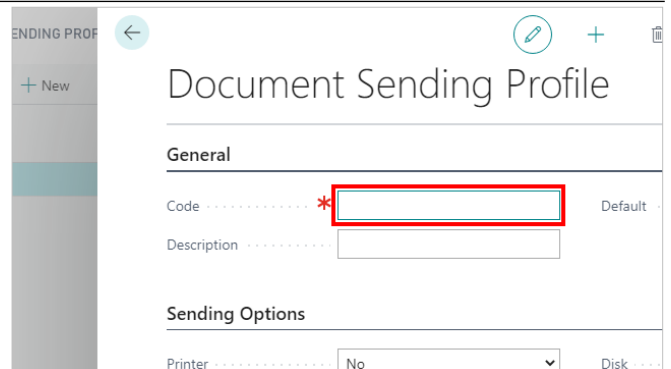
Click on **Document Sending Profiles Lists** ☐



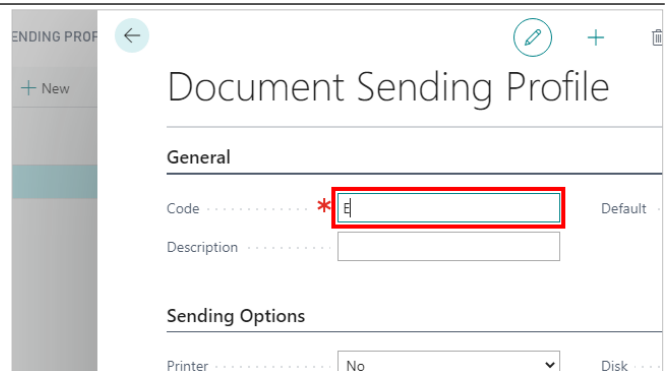
Click on the navigation menu item **New**



Click on the field **Code**



Enter the text **Email**.





Click on the field **Description**

+ New

Document Sending Profile

General

Code * Email Default

Description

Sending Options

Printer No Disk

Email No Electronic

Enter the text **Emailing Documents**.

+ New

Document Sending Profile

General

Code EMAIL Default

Description

Sending Options

Printer No Disk

Email No Electronic

Click on the field **Email**

Code EMAIL Default

Description Emailing Documents

Sending Options

Printer No Disk

Email No Electronic

Click on the item **Yes (Prompt for Settings)** in the list

Description Emailing Documents

Sending Options

Printer No Disk

Email

No

Yes (Prompt for Settings)

Yes (Use Default Settings)

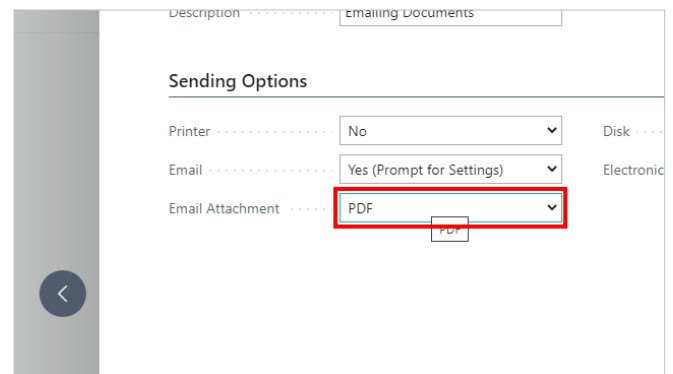
Yes (Prompt for Settings)

The setting of Yes (Prompt for Settings) enables users to change the email attachment, when select Ship & Send, Invoice & Send or Return & Send. It also allows the user to add a note that is emailed along with the document.

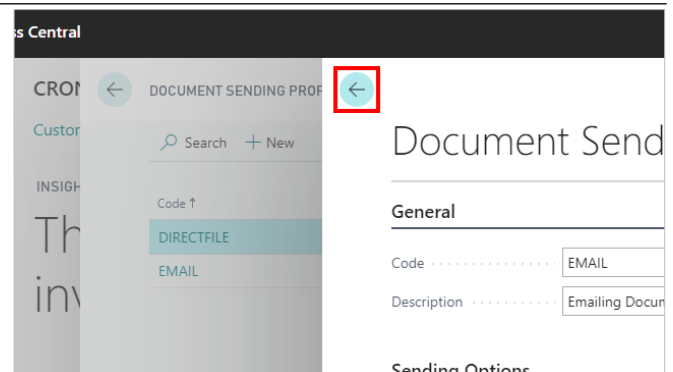
The setting of Yes (Use Default Settings) will use the settings on the Document Sending Profile with the Default field checked.

Click on the field **Email Attachment**

For emailing or sending rental documents, the email attachment should be set to PDF.



Click on the back button



2.3.5. How to Set Up Rental Report Selections

2.3.5.1. Overview

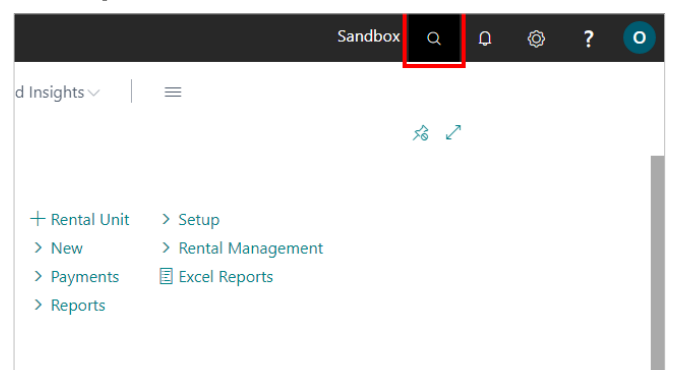
The Rental Report Selections feature provides the ability to specify the report to be used for a rental quote, rental contract, proforma invoice, rental delivery, rental return, posted rental invoice and posted rental credit memo.

When the rentals app is installed, then the report selections are automatically populated with the base Rentals report ID's, and the Use for Email Attachment is flagged. NOTE: The rental Proforma Invoice cannot be sent or emailed.

Should an organization have custom layouts for any of the rental documents, which apply to all the Customers, then the custom report can be setup in the Rental Report Selections by selecting the applicable report ID.

2.3.5.2. How to Setup Rental Report Selections

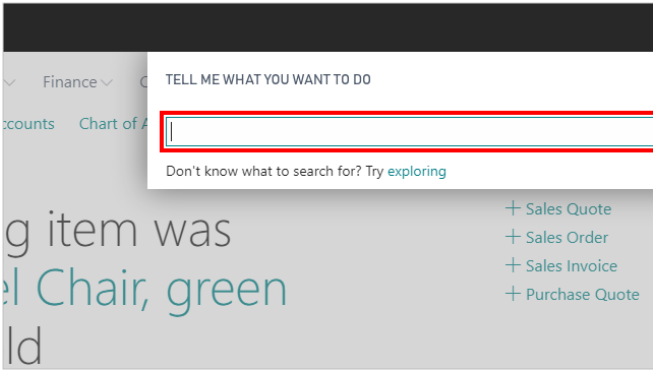
Click on the link **Tell me what you want to do.**



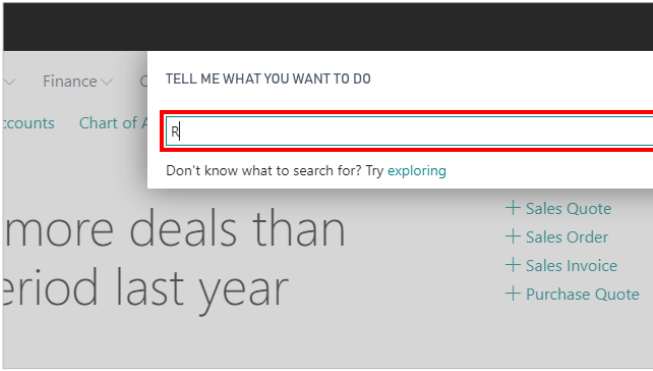


ODT Rentals Online Help

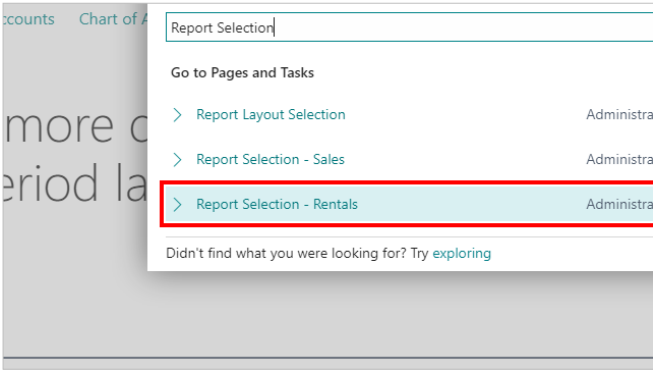
Click on the field **Type** to start search:



Enter the text **Report Selection**.

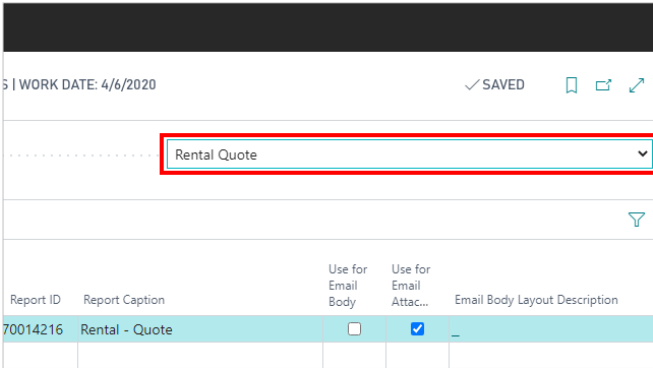


Click on **Report Selection - Rentals Administration**

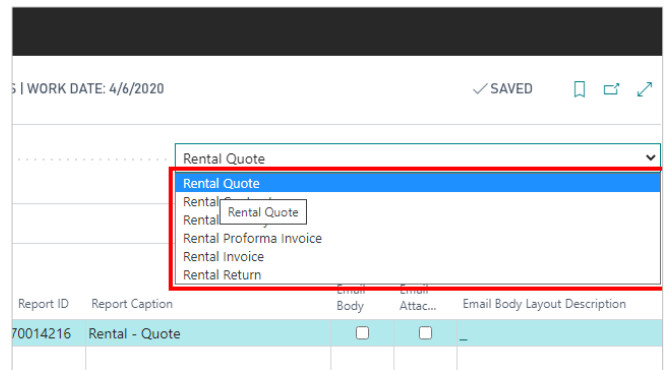


Click on the field **Usage**

The Usage option field contains a listing of the rental documents available to specify the report ID on.



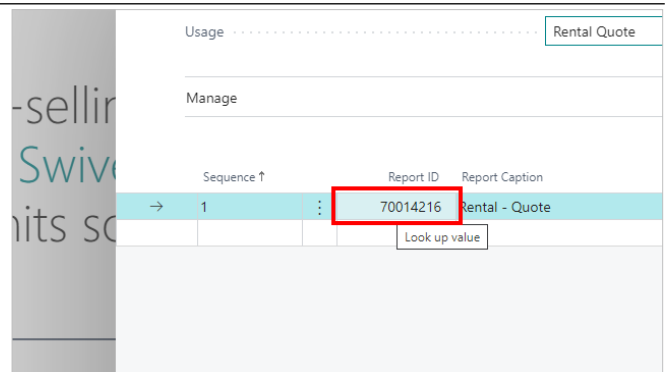
Click on the item **Rental Quote** in the list



The screenshot shows a dropdown menu for 'Rental Quote' with the following options: Rental Quote, Rental Proforma Invoice, Rental Invoice, and Rental Return. The 'Rental Quote' option is highlighted. Below the dropdown is a table with columns: Report ID, Report Caption, Email Body, Email Attac..., and Email Body Layout Description. The first row shows Report ID 70014216 and Report Caption Rental - Quote.

Click on the cell **Report ID** with the value **70014216**

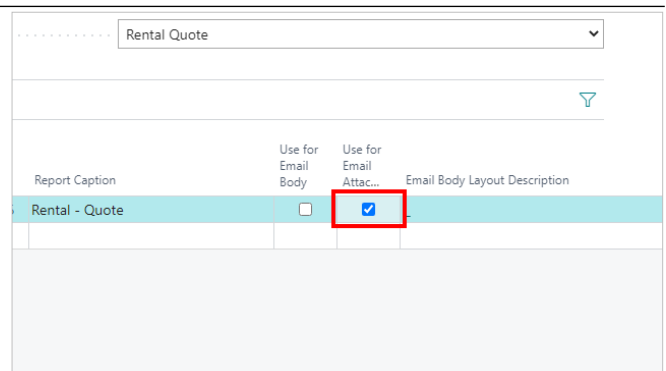
Should the organization have a custom report for the rental quote, then lookup and select the applicable report ID.



The screenshot shows a table with columns: Sequence ↑, Report ID, and Report Caption. The first row shows Sequence 1, Report ID 70014216, and Report Caption Rental - Quote. A 'Look up value' button is visible below the table.

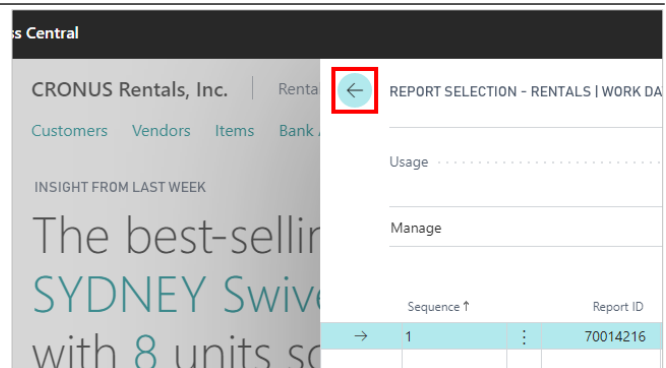
Click on the cell **Use for Email Attachment** with the value **on**

Should the organization want to send or email the rental document, then the Use for Email Attachment must be enabled.



The screenshot shows a table with columns: Report Caption, Use for Email Body, Use for Email Attac..., and Email Body Layout Description. The first row shows Report Caption Rental - Quote, Use for Email Body checkbox, Use for Email Attac... checkbox (checked), and Email Body Layout Description.

Click on the back button



The screenshot shows a navigation bar with a back button (left arrow) highlighted. Below the navigation bar is a table with columns: Sequence ↑, Report ID, and Report Caption. The first row shows Sequence 1, Report ID 70014216, and Report Caption Rental - Quote.

Repeat the above steps from the selection of Usage field, and revise the Report ID, if applicable.

2.3.6. How to Update Customer Cards for Rentals

2.3.6.1. Overview

The Customer card has a tab called Rentals, which contains fields related to the ODT Rentals.

The Rental Terms Code, which when specified, will default to the Rental Quote and Rental Contract, General tab. The configuration of this field is optional.



Multiple rental line discount fields are available, which enable an organization to specify differing discount percentages based on the Link Type setup on the rental units or specify a Default Rental Discount percentage that will apply to all rental units when entered on a quote or contract.

For additional information on these fields, please see the chapter on Customer Line Discount Percentages.

The fields in the next screen capture are related to the Billing Cycles feature and include:

- Billing Cycle Type
- Default Invoicing Period Code
- Billing Cycle Tolerance Days
- Billing Cycle Day

To learn about the Billing Cycle feature, and the setup of these fields, see the help in Processing Rentals, Rental Contracts Using Billing Cycles.

Click on the field **Billing Cycle Type**

The ODT Rental App provides the ability to specify custom rental reports on the Customer - Document Layouts in the Report Selection - Rentals.

NOTE:

Should the organization be specifying Locations on the Customer card, and the Customer be a customer renting product, then the Location entered must be a location that has the Allow Rentals flagged.

NOTE:

When on the Shipping Fast Tab, under Show more, the Shipment Method fields are populated, the data will default to Rental Quotes and Rental Contracts, Shipping Fast Tab. The data will then default to the Rental and Sales Lines, when product in entered, in the same manner as which they do on Sales documents.

NOTE:

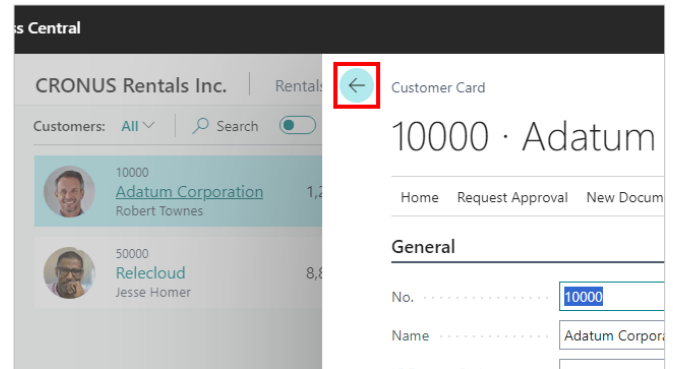
The following chapters demonstrate the setups available on the Customer card for rentals.

2.3.6.2. Steps to Add a Rental Term Code to a Customer

Profile - Business Manager

Click on the navigation menu item **Customers**

Click on the back button



2.3.6.3. Customer Line Discount Percentage

Organizations may provide rental discounts to different customer, which may have varied line discount percentages based on whether the rental units are linked to a fixed asset, an inventory item, a resource, a G/L account charge, or a rental package as a whole.

Should an organization not be using Rental Packages and are not setting up Rental Price cards on groups or units, then in order for the rental discounts to be applied, the customer card, Invoice Tab field, Allow Line Disc., must be enabled.

The Customer cards, Rental tab has been enhanced to provide the ability to specify default line discount percentages, which will default to the rental quote and contract Invoice Details tab. The discount % will default to the rental lines from the header when unit groups, units or rental packages are selected.

Line Discounts fields have been added to the customer card, Rental tab for specifying a default Line Discount % for a variety of rental unit, Link Types.

To learn about the setup and processing of rental line discounts, see ODT Rentals Online Help, Additional Rental Processes, Rental Line Discounts.

2.3.6.4. Customer Rental Instructions

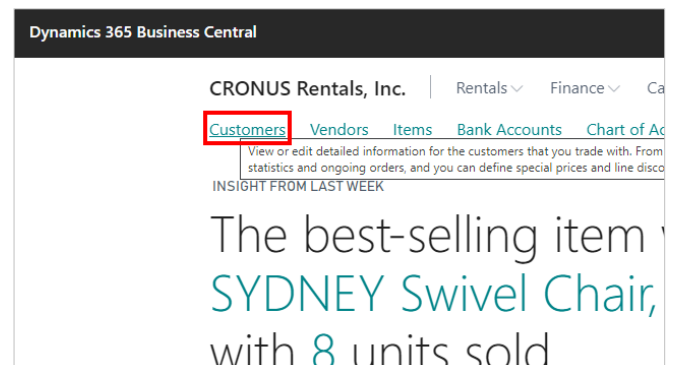
The Customer rental instruction feature provides the ability to specify instructions related to rentals on the customer card, rentals tab.

A Customer Rental Instructions field has been added to the rental quote and contract, general tab, which when there are instruction setup on the customer, the field will display yes. When clicking on the Yes the Customer Rental Instructions page will be opened to display the instructions.

The instructions field is also displayed on the Completed Rental Quote, Completed Rental Contract and the Posted Rental Invoice.

The following demonstrates the setup of a customer rental instruction.

Click on the navigation menu item **Customers**





Click on the link in cell **No.** with the value **10000**

CRONUS Rentals, Inc.

Rentals

Finance

Cash Management

Customers

Vendors

Items

Bank Accounts

Chart of Accounts

Rental Period

Customers: All

Search

+ New

Delete

Process

Report

No. ↑

Name

Responsibility Center

Location Code

Photo

10000

Adatum Corporation

20000

Trey Research

30000

School of Fine Art

40000

Alpine Ski House

50000

Relecloud

Click on the link **Rental Instructions**

	Item Rental Unit Disc. %	
0	Resource Rental Unit Disc. %	
0	G/L Acct Rental Unit Disc. %	
0	Rental Instructions	No

Rental Instructions
Specifies a set of rental instructions for this customer.
[Learn more](#)

Click on the link **No**

Disc. %	0
Unit Disc. %	0
Unit Disc. %	0
is	No

Sell-to
Ongoing Quotes
Ongoing Invoices
Posted Sales

Click on the navigation menu item popup **Manage**

WORK DATE: 4/6/2020

Search Manage Open in Excel Navigate

Adatum Corporation

CUSTOMER RENTAL INSTRUCTIONS LIST

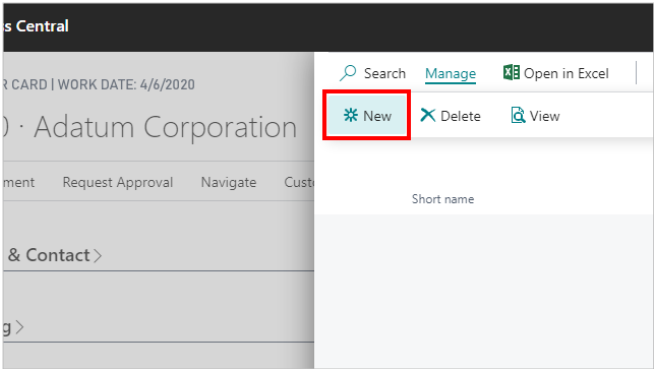
Short name

(There

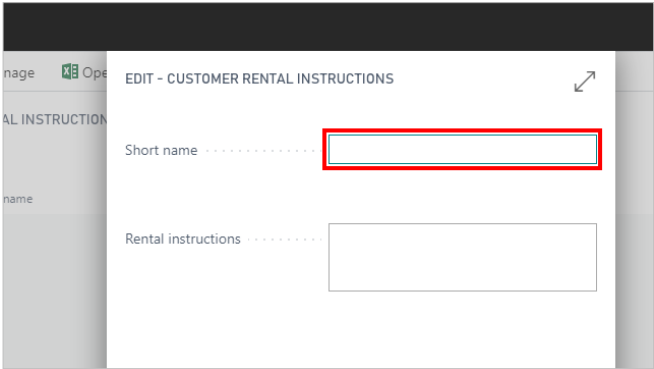


ODT Rentals Online Help

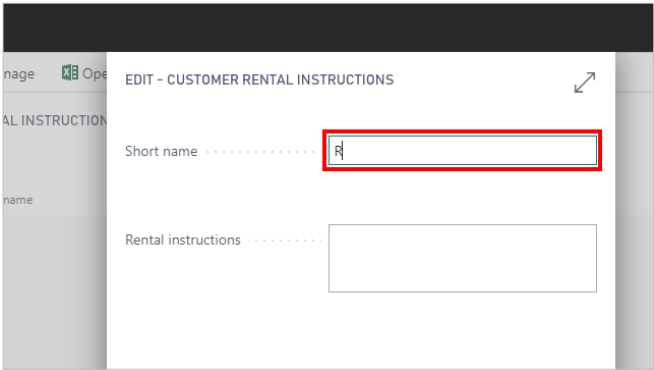
Click on the navigation menu item **New**



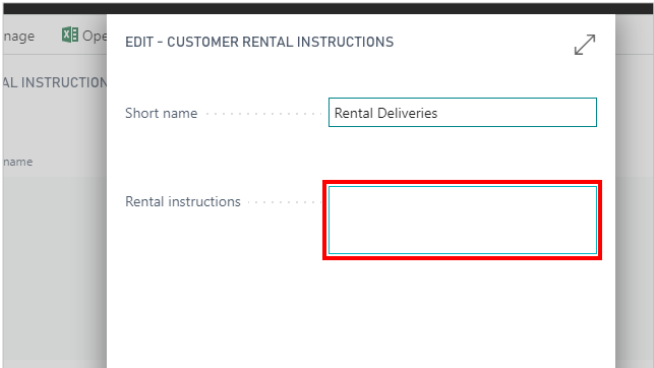
Click on the field **Short name**



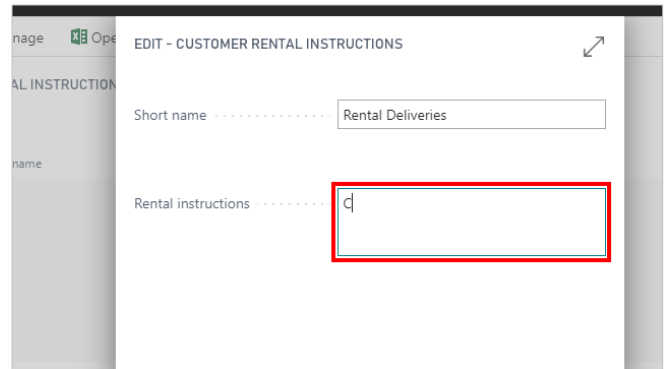
Enter the text **Rental Deliveries**.



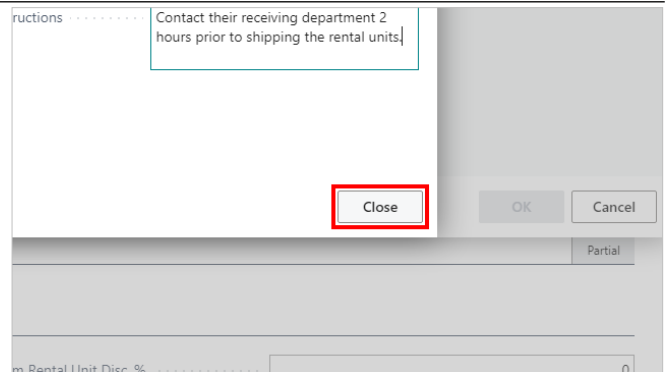
Click on the textarea **Rental instructions, (Blank)**



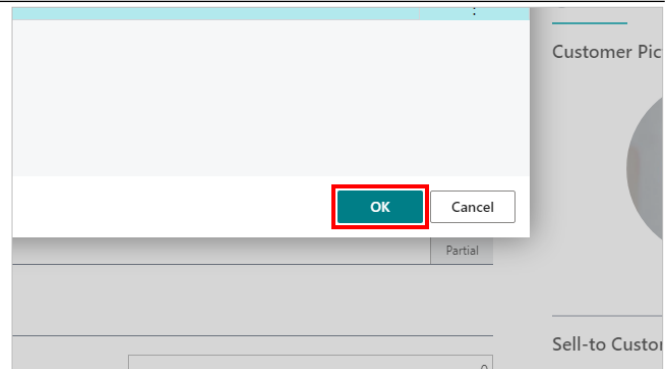
Enter the text **Contact the receiving department 2 hours prior to shipping the rental units.**



Click on the button **Close**



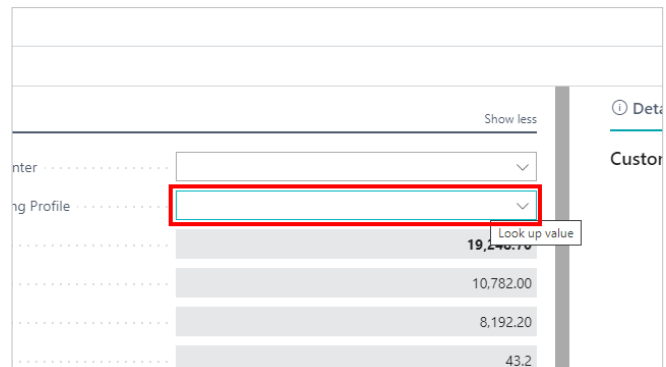
Click on the button **OK**



2.3.6.5. How to Add a Document Sending Profile

The following demonstrates the setup of a Document Sending Profile on a Customer card.

Click on the field **Document Sending Profile**





Click on the link in cell **Code** with the value **EMAIL**

Click on the field **Email**

The email address on the Address & Contact tab is the address that the documents will be emailed to.

2.3.6.6. How to Add Custom Rental Document to Document Layouts

When an organization has custom rental documents, which are only for specific customers, then on the Document Layouts, the reports can be specified.

When Document Layouts are setup on a Customer card the custom documents specified will be sent to the customer, rather than the documents specified in the Report Selections - Rentals.

For additional information on sending or emailing rental documents, see ODT Rental Online Help, Setup Rentals, Financial Setups for Rentals, Sending and Emailing Rental Documents.

The following demonstrates the setup of a custom rental document that is to be used for a customer.

Click on the navigation menu item **Customers**



ODT Rentals Online Help

Click on the link in cell **No.** with the value **40000**

Customers: All ▾ Search New Delete Process Report ▾				
No. ↑	Name	Responsibility Center	Location Code	Pho
10000	Adatum Corporation			
20000	Trey Research			
30000	School of Fine Art			
40000	Alpine Ski House			
50000	Relecloud			
C00010	Joe Rental			

Click on the navigation menu item popup **Navigate**

4/6/2020

Ski House

Approval | **Navigate** | Customer | Actions | **Navigate** | Report | Fewer options

40000

Alpine Ski House

Responsibility Center

Document Sending Profile

Total Sales

Click on the navigation menu item popup **Customer**

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 4/6/2020

40000 · Alpine Ski House

New Document | Request Approval | Navigate | Customer | Actions

Customer

History

Prices and Discounts

Sales

No. 40000

Name Alpine Ski House

IC Partner Code

Click on the navigation menu item **Document Layouts**

Contact

Cross References

Comments

Approvals

Attachments

Document Layouts

Address & Contact

Invoicing



ODT Rentals Online Help

Click on the cell **Usage** with the value **Quote**
Confirmation Order Invoice Credit Memo
Customer Statement Job Quote Reminder
Shipment Rental Quote Rental Contract Rental
Delivery Rental Proforma Invoice Rental Invoice
Rental Return

Click on the item **Rental Contract** in the list

Click on the cell **Report ID** with the value **0**

Click on the lookup button in the cell **Report ID**



ODT Rentals Online Help

Click on the link **Select from full list**

Object ID ↑	Report	Object Caption
2	Report	General Journal - Test
4	Report	Detail Trial Balance
5	Report	Receivables-Payables
7	Report	Trial Balance/Previous Year
9	Report	Trial Balance/Budget

11/3/2020

Disable Search by Name

Click on **Search**

Search

SELECT

Object ID ↑	Object Type ↑
2	Report
4	Report
5	Report
7	Report
9	Report

Enter the text **Rental**.

Search

SELECT

Object ID ↑	Object Type ↑
2	Report
4	Report
5	Report
7	Report
9	Report

Click on the link in cell **Object ID** with the value **70014204**

Select the Object ID that has the Report Caption of the custom report document to be assigned to the customer, for the selected Usage option.

Alpine Ski House

Request Approval

Navigate

Cust

40000

Alpine Ski Hous

Code

SELECT

Object ID ↑	Object Type ↑
70014200	Report
70014202	Report
70014203	Report
70014204	Report
70014205	Select record "70014204"
70014206	Report
70014207	Report
70014208	Report
70014209	Report



ODT Rentals Online Help

Click on the link in cell **Custom Layout Description** with the value

Click on the link in cell **Report ID** with the value **70014204**

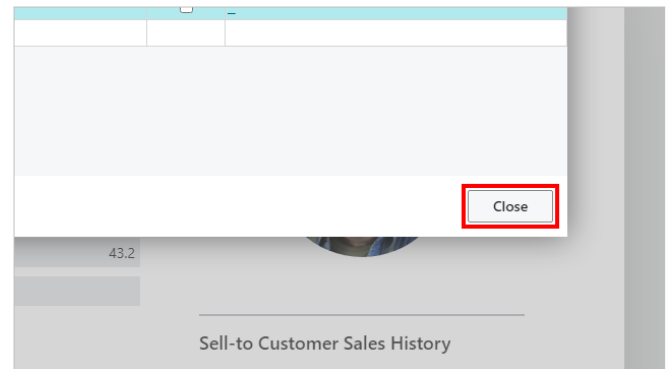
To populate the Custom Layout Description, select the record containing the custom report ID selected.

Click on the button **OK**

Click on the cell **Send To Email**

The Send to Email field is only populated if the organization is sending or emailing documents to a different email address than on the Customer card, Address & Contact tab.

Click on the button **Close**



2.3.7. Rental Terms and Conditions

2.3.7.1. Overview

ODT Rentals provides the ability to upload the organizations rental terms and conditions document for inclusion when print, email or send the Rental Quote and Rental Contract.

Organizations can specify whether the uploaded Terms and Conditions pdf file data can be printed when the quote or contract is printed, or the pdf file is attached when select Email or Send.

The setups required for the Rental Terms and Conditions include:

- Importing the Rental Terms and Conditions PDF document.
- On the Email Accounts of the users who will be email or send the Rental Quote and/or Rental Contract to the customers an Email Scenario must be configured for the Terms and Conditions.
- On the Customer card the Document Sending Profile needs to be set to a profile configured for emailing documents, and the Email field on the Address & Contact tab must be populated so it defaults to the Rental Quote and Contract.

To learn about setting up a Document Sending Profile for Email, please see the User Help, Sending and Emailing Rental Documents located in Financials Setup for Rentals.

- On Rental Management Setup, Documents Tab, the Rental Terms & Conditions field must be enabled to specify that the terms and conditions file attachment can be printed with the Rental Quote or Contract when printed, or attached when Send or Email is ran from the Rental Quote or Rental Contract.

NOTE:

Setup Email must be configured to setup the Email Scenarios on the user Email Accounts.
If Set Up Email has not been setup then must setup the default email account.

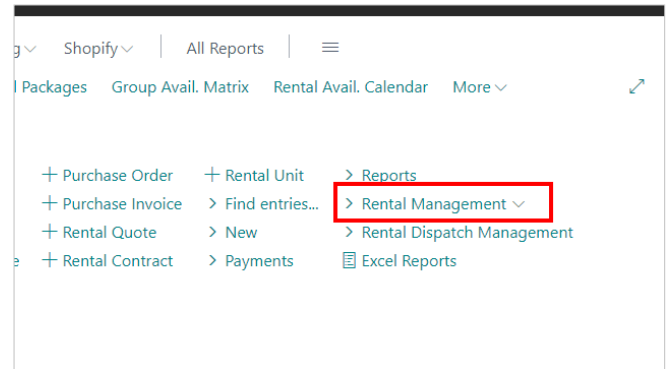
2.3.7.2. How to Import the Rental Terms and Conditions Document

The following demonstrates the importing of the Terms and Conditions document.

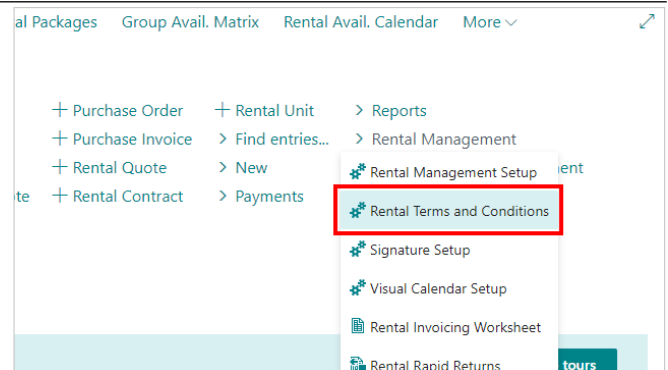
IMPORTANT NOTE:

The file must be a PDF file.

Click on the navigation menu item popup **Rental Management**

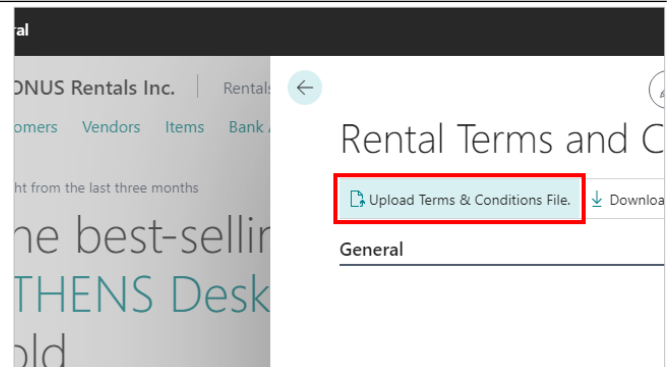


Click on the navigation menu item **Rental Terms and Conditions**



Click on the navigation menu item **Upload Terms & Conditions File**.

Browse to the location the file is saved, select the file and then Open.



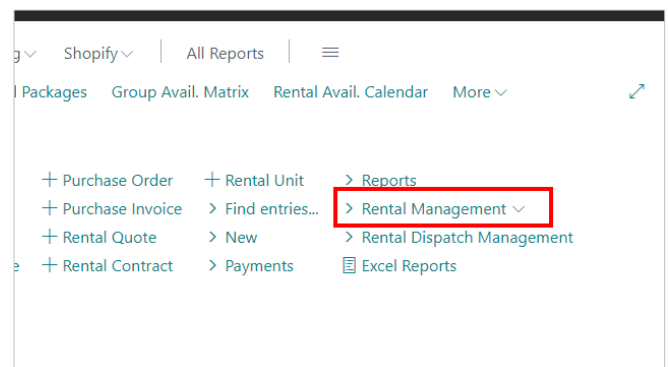
The pdf file data will be displayed in the General tab section once uploaded.

IMPORTANT NOTE:

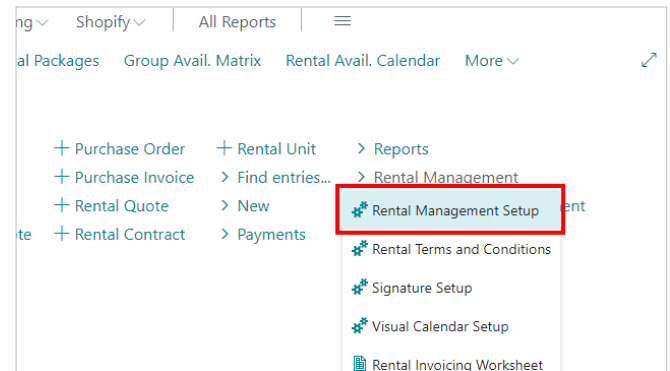
When uploading a PDF file with multiple pages, the user must wait until the last page is rendered before closing the Rental Terms and Conditions page to ensure it is saved correctly.

2.3.7.3. How to Enable Terms & Conditions on Rental Management Setup

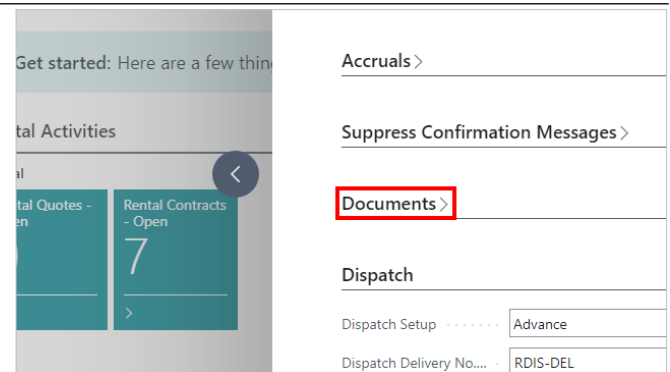
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**

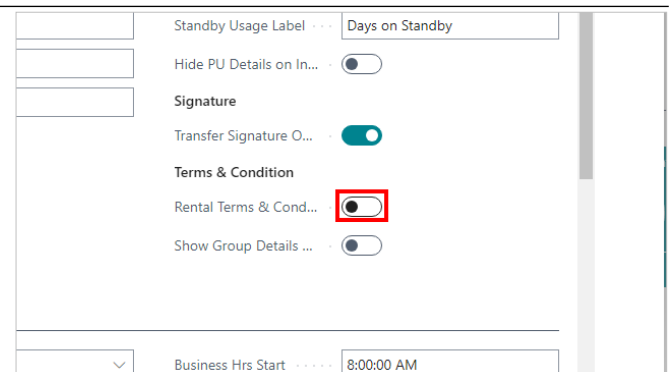


Click on **Documents**



Click on the toggle field Rental Terms & Conditions

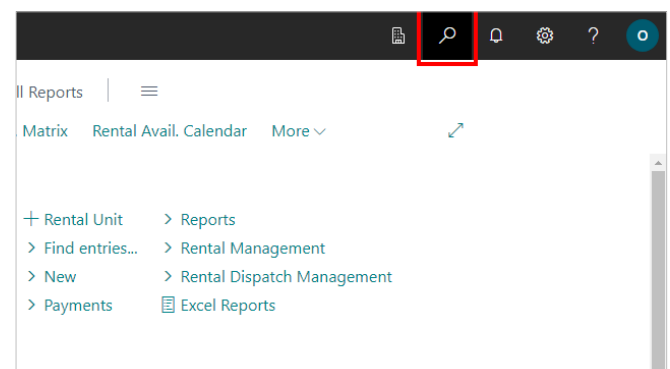
Clicking on the field will enable Rental Terms & Conditions.



2.3.7.4. How to Setup the Email Scenario on the Users Email Accounts

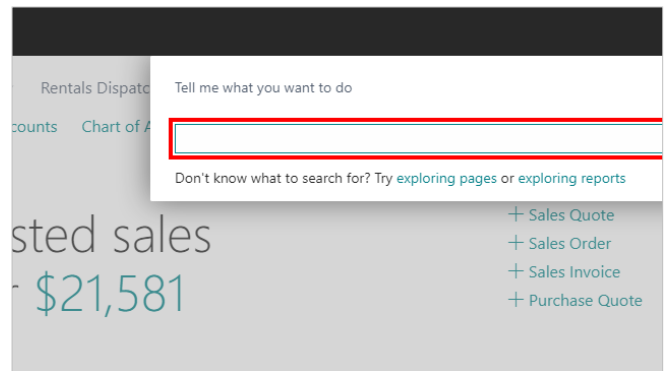
The following demonstrates setting up an Email Scenario on an Email Account. This process must be done for each user Email Account that will Send or Email the Rental Quote and/or Rental Contract.

Click on the button **Search**

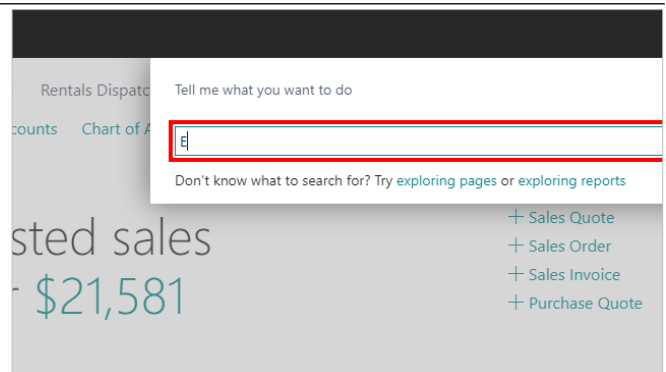




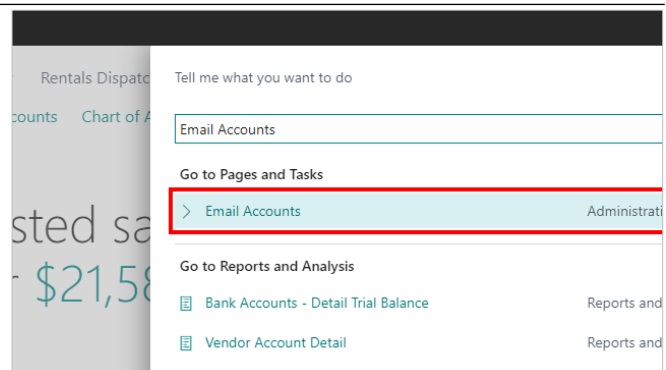
Click on the field **Tell me what you want to do**



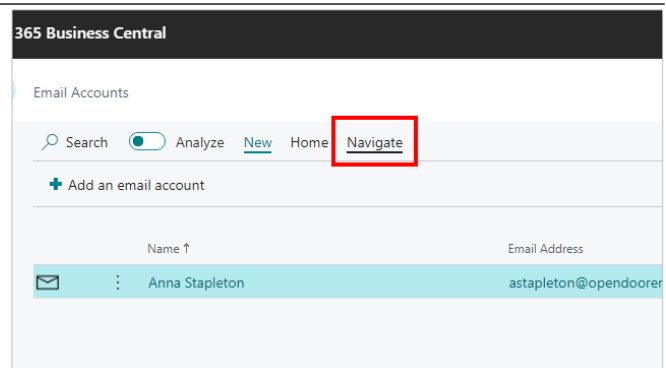
Enter **Tell me what you want to do**.



Click on **Email Accounts Administration** ☐

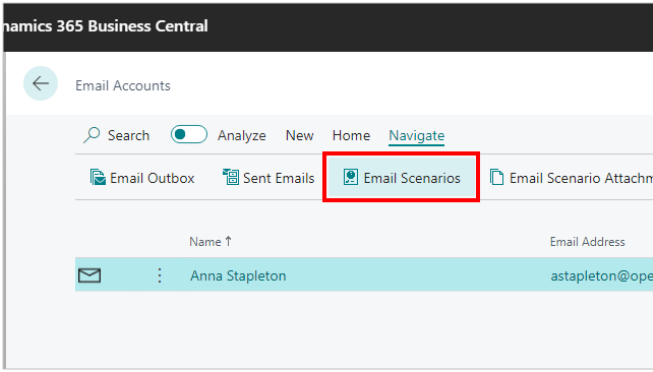


Click on the navigation menu item popup **Navigate**

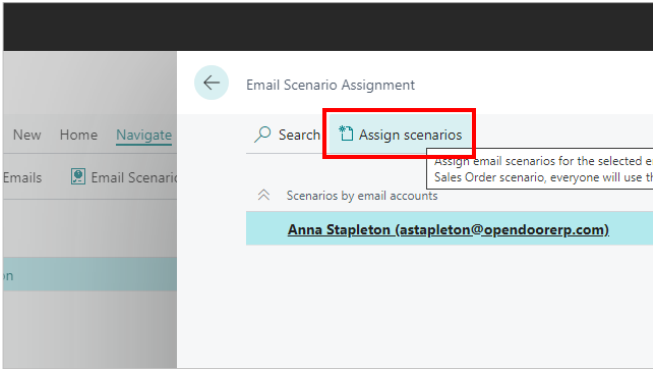




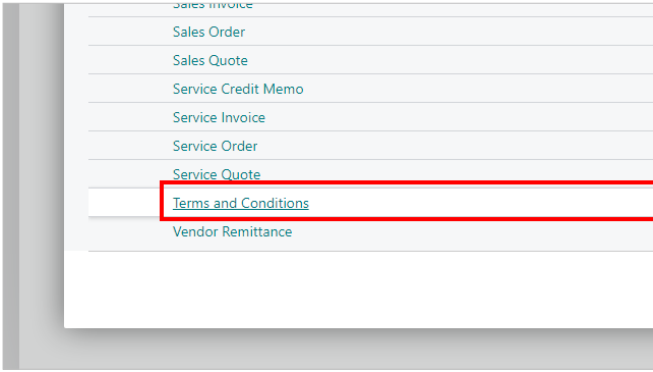
Click on the navigation menu item **Email Scenarios**



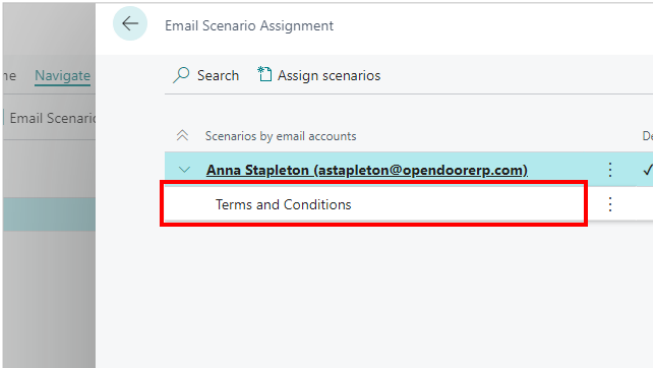
Click on the navigation menu item **Assign scenarios**



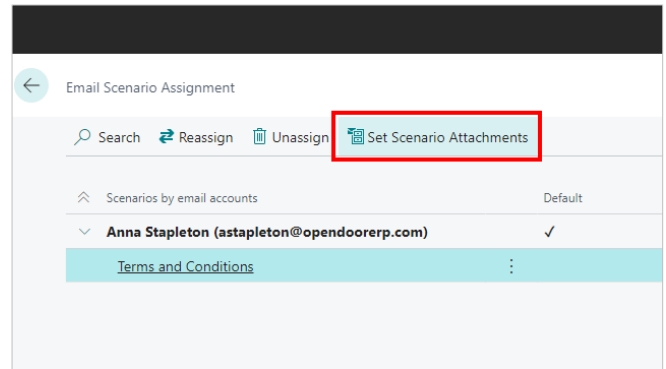
Click on the link in cell **Email scenario** with the value **Terms and Conditions**



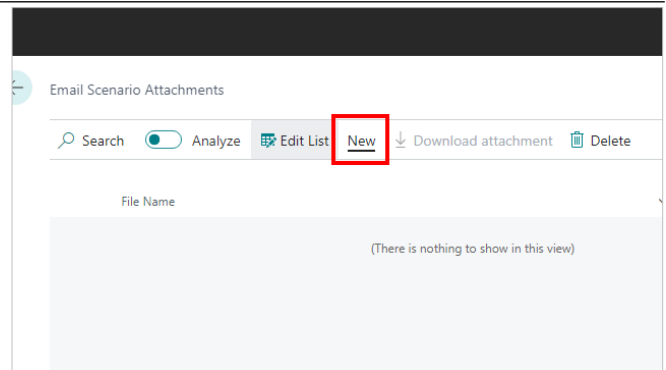
Click on the cell **Scenarios by email accounts** with the value **Terms and Conditions**



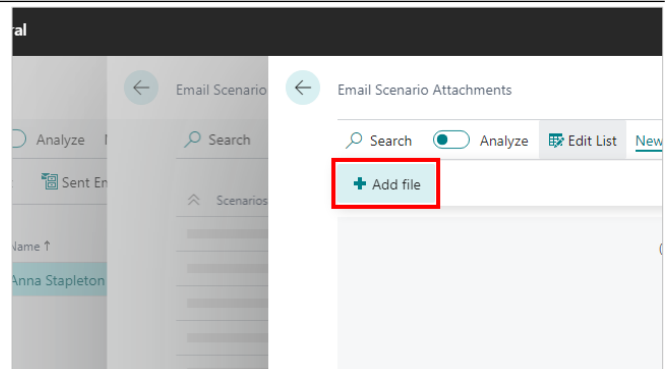
Click on the navigation menu item **Set Scenario Attachments**



Click on the navigation menu item popup **New**

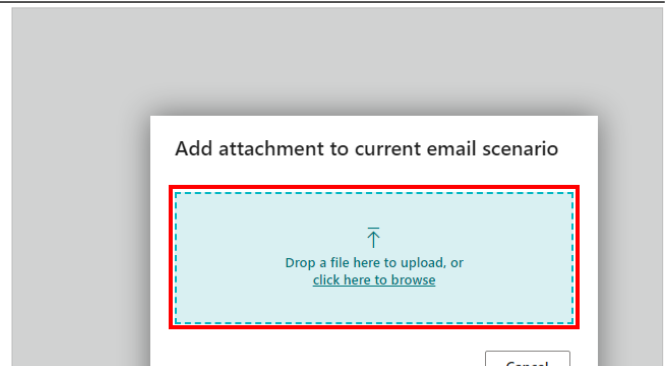


Click on the navigation menu item **Add file**



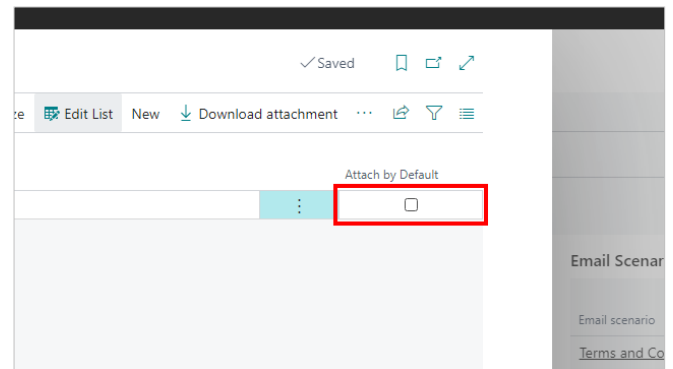
Click on ☐ **Drop a file here to upload, or click here to browse**

Either Browse to where the Terms and Conditions pdf field is and select the file, then select open or drag & drop the field into the box.



Click on **Attach by Default**

The Attach by Default MUST be checked.



2.3.7.5. Processing

When printing, emailing, or sending a Rental Quote or Rental Contract, the PDF file for the creation on the quote & contract report when Print, or attaching when Email or Send uses the: Use default values from: Last used options and filters from the last time printed the rental report to a printer or pdf.

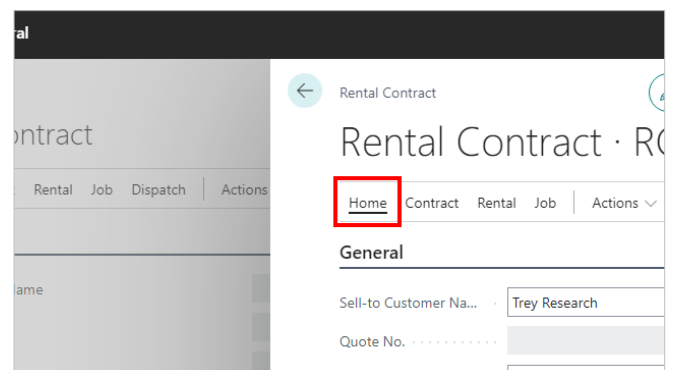
- If Print Terms & Conditions was enabled the last time the document was printed or sent to pdf, then the email/send will include the Terms & Conditions pdf file.
- If Print Terms & Conditions was not enabled the last time printed or sent to pdf, then the email/send will not include the Terms & Conditions pdf file.

Printing a Rental Quote or Contract with the Terms & Conditions.

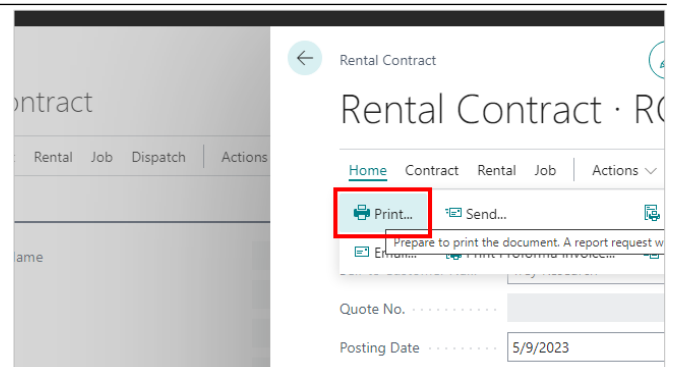
As the rental reports use a report header and footer, the space for the header and footer are reserved on subsequent pages Therefore, on the pages with the Terms and Conditions printing will start below the reserved space for the report header and end above the space reserved for the report footer.

The following demonstrates the printing of a Rental Contract with the Terms & Conditions.

Click on the navigation menu item popup **Home**



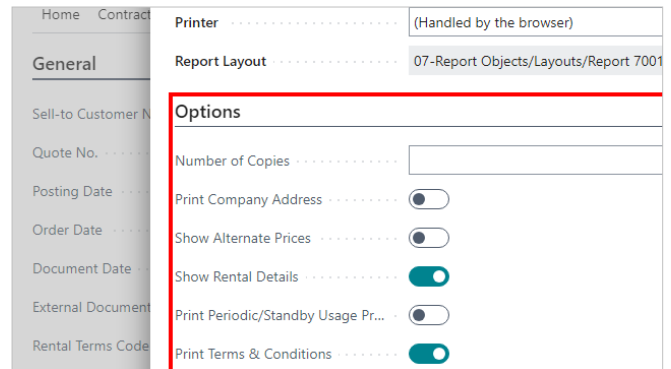
Click on the navigation menu item **Print...**



Click on **Options** **Number of Copies** **Print Company Address** **Show Alternate Prices** **Show Rental Details** **Print Periodic/Standby Usage Prices** **Print Terms & Conditions** **Log Interaction**

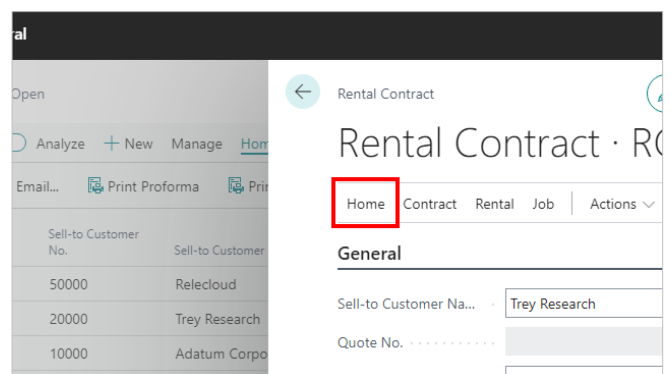
Note that the Print Terms & Conditions is enabled, as the last time a Rental Contract was printed the field was enabled.

Therefore, the Terms and Conditions will print on the page following the last page of the Rental Contract document.

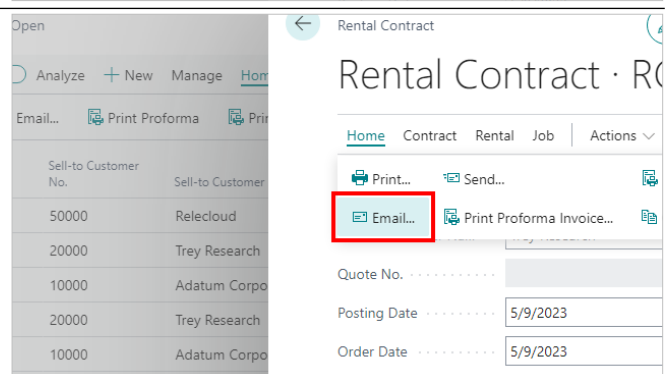


Email the Rental Contract with the Terms & Conditions pdf file.

Click on the navigation menu item popup **Home**

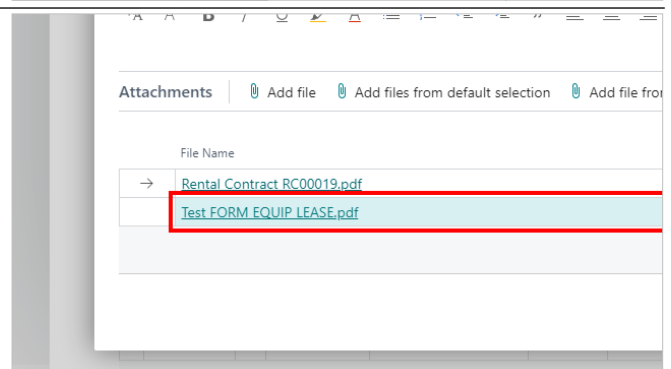


Click on the navigation menu item **Email...**

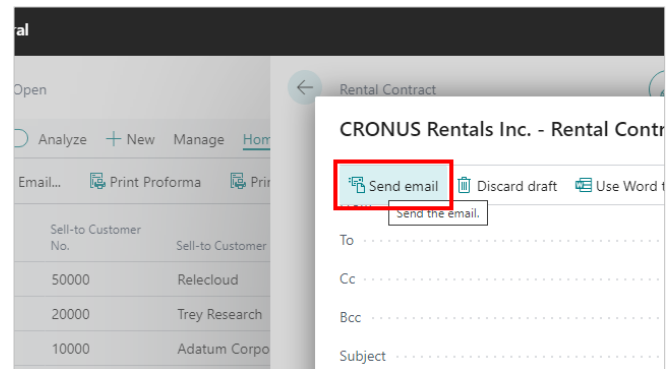


Click on the link in cell **File Name** with the value **Test FORM EQUIP LEASE.pdf**

Note that the Terms & Condition pdf file is attached to the email.



Click on the navigation menu item **Send email**



2.4. Setup Rental Locations

2.4.1. Using Locations with Rentals Overview

2.4.1.1. Overview

The Rentals App provides for using Locations with Rental Units for use in processing rentals.

- Locations can be specified on the Rental Units, whether the Rental Units are not linked to any master records, or are linked to Fixed Assets, Resources or G/L Accounts.
- A Location for where the unit is rented from can be specified on each Rental Unit. The location will default to the rental line on Rental Contracts and Rental Quotes.
- Locations are not specified on Rental Units that are setup as Rental Unit Groups, as a group can have units with a variety of Locations.
- Rental Units can be returned to a different or temporary rental location, when the unit does not have Allow Overbooking enabled.
The temporary location can be setup for when a unit may be returned to a Vendors maintenance shop, or a location for temporary storage until the unit is rented out to the next customer.

For additional information on temporary rental locations, review the help, How to Set Up a Temporary Rental Location.

On Rental Management Setup there are various fields related to using locations with rentals.

- Location Mandatory, which when enabled enforces the specification of a rental location on the Rental Units, excluding Rental Unit Groups and Rental Units linked to Inventory Items.
- Inventory Rentals Location and Inventory Rentals In-Transit Location, which are for use when Rental Units are linked to Inventory Items.
- Rental FA Transfer Mandatory and Default FA Transfer In-Transit Location, which are for use when Rental Units are linked to Fixed Assets.

2.4.1.2. Rental Units Linked to Fixed Assets

When a Rental Unit is linked to a Fixed Asset, then the use of Rental Locations has additional features and setups on Rental Management Setup, and on the Fixed Asset card.

- A Rental FA Transfer Journal is available for the transferring of the Fixed Asset and Rental Unit from one rental location to another rental location at the same time. When the journal is posted a FA Transfer Shipment and FA Transfer Receipt are created and posted, which updates the location on the asset and unit cards.
- When on Rental Management Setup, the Rental FA Transfer Mandatory field is enabled, then it is mandatory that the Default FA Transfer In-Transit Location field be populated.

When on the Rental Unit card, the Link Type is set to Fixed Asset and Link Code is populated with the Fixed

Asset No., then the Rental Location field on Rentals tab of the asset card will be populated with the location on the unit card.

If the asset card already has the Rental Location field populated, and then the unit is linked to the asset, the Location Code on the unit will be populated with the same location that is in the Rental Location field on the asset card.

When the Rental Unit is returned to a different or temporary rental location, then the Rental FA Transfer Journal is created and automatically posted, which creates and posts the FA Transfer Shipment and FA Transfer Receipt, which updates the rental location on the asset and unit cards.

To learn about the Rental FA Transfer Journal feature, see the ODT Rental Online Help, Additional Rental Processes, Rental FA Transfer Journal.

2.4.1.3. Rental Units Linked to Inventory Items

The use of Locations with Rentals has unique conditions, when Rental Units are linked to Inventory Items.

- When Rental Units are linked to an Inventory Item, then the Rental Unit card will not have a Location specified, even when Rental Management Setup has the Location Mandatory field checked.
- The inventory locations functionality handles the use of locations in conjunction with the Rental Unit linked to an Item.
- Item Availability plus Rental Reservations control the availability of the Rental Unit linked to an Inventory Item.

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 are required by the organization.

To learn about setting up rental locations for units linked to items, see the help, How to Set Up an Inventory Rentals Location, How to Set Up an Inventory Rentals In-Transit Location and How to Set Up a Rental Location with Bins.

To learn about processing rentals when units are linked to Inventory Items, see ODT Rentals Online Help, Processing Rentals, Rental Contracts.

2.4.2. How to Modify Locations for Rentals

2.4.2.1. Overview

The Rental App enables the assignment of a location to the rental units. This feature allows for having units with different locations assigned to a rental unit group.

Rental Unit Groups do not require the Location to be setup. This enables the grouping of like units no matter where they are located.

If your organization has specific locations from which rentals occur, then these locations, when setup, will require the selection of the added field called, Allow Rentals.

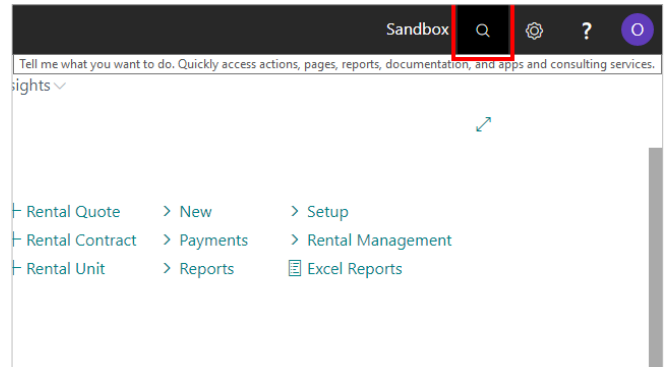
In addition, your organization can ensure that locations are assigned when creating new rental units, and are entered on the rental line of the rental contract, by selecting Locations Mandatory on Rental Management Setup.

2.4.2.2. Steps to Modify Locations for Rentals

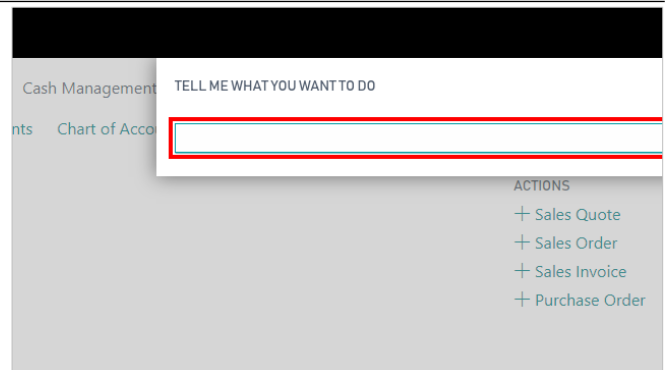
Profile - Business Manager

The following demonstrates the activation of the Allow Rentals field on the Location card, which is mandatory, when renting from Locations.

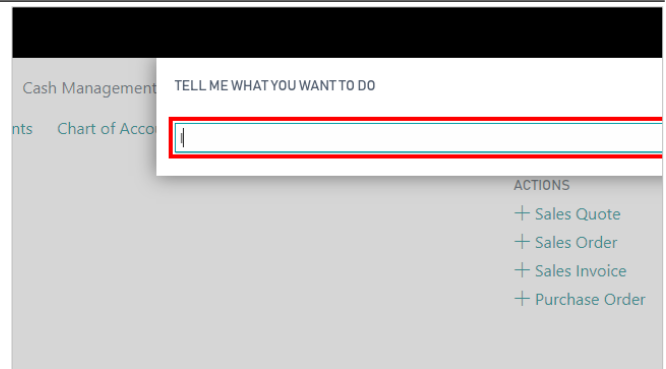
Click on the link **Tell me what you want to do.**



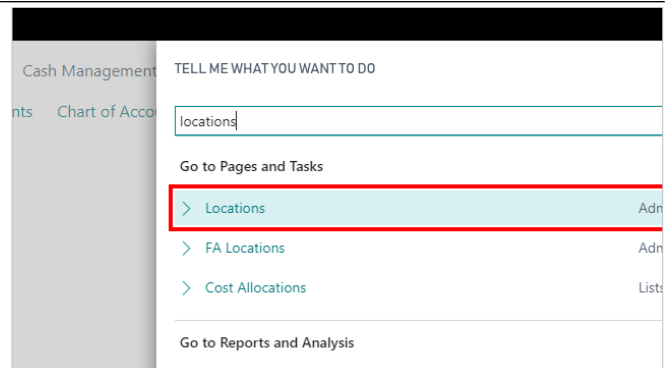
Click on the field **Type to start search:**



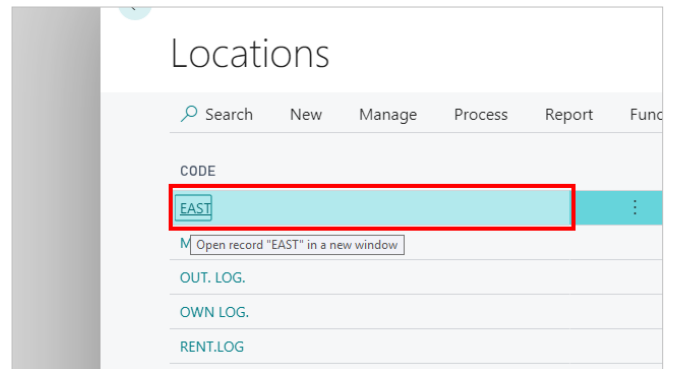
Enter the text **locations.**



Click on **Locations Administration**



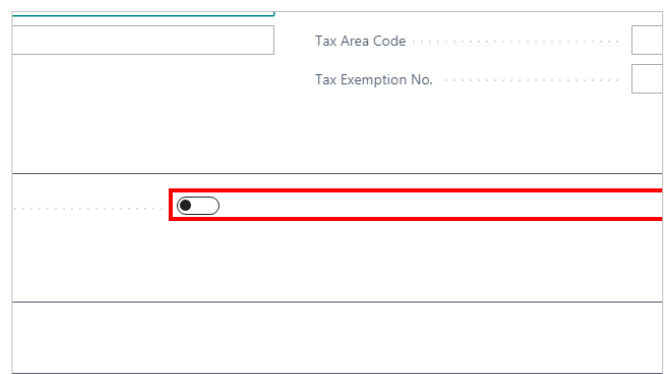
Click on the link in cell **Code** with the value **EAST**
Select the Location where rental units are located and rented from.



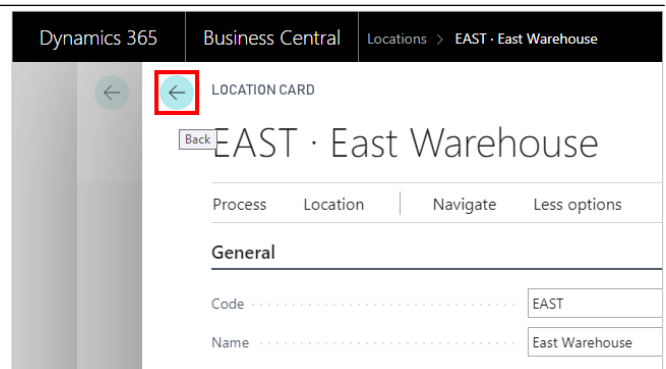
Go to the Rental fast tab on the Location card.

Click on **Allow Rentals**

The default setting on the field is No.
Clicking on the field will set the option to Yes.

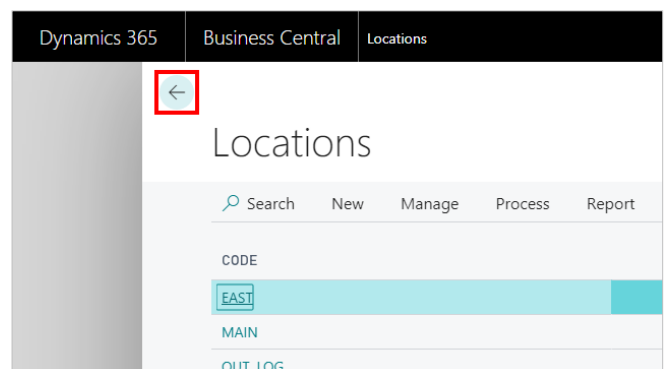


Click on the back button



Repeat the selection of Allow Rentals on all Locations, where rental units are located and rented from.

Click on the back button



2.4.3. How to Set Up a Temporary Rental Location

2.4.3.1. Overview

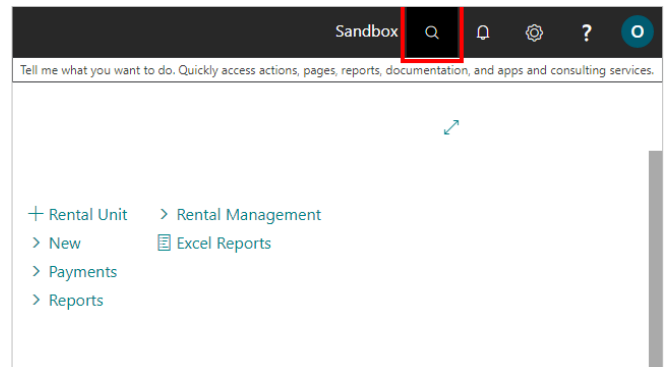
The temporary rental location is a location not owed by the organization, where a unit may be returned to, or stored at until the unit is rented out to the next customer.

For example, if an organization does not perform repairs to their rental product, it can be returned to a Vendors maintenance shop. A text field is provided to specify where this location is. It can be the vendors address or the name of the shop.

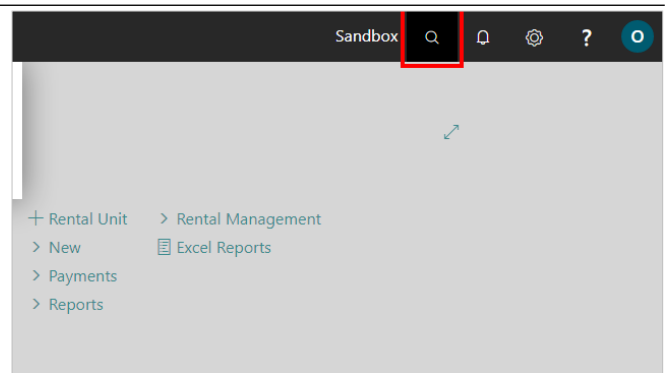
To learn about returning units to a temporary location, see ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Return a Rental Unit to a Different or Temporary Location.

2.4.3.2. How to Setup a Temporary Rental Location

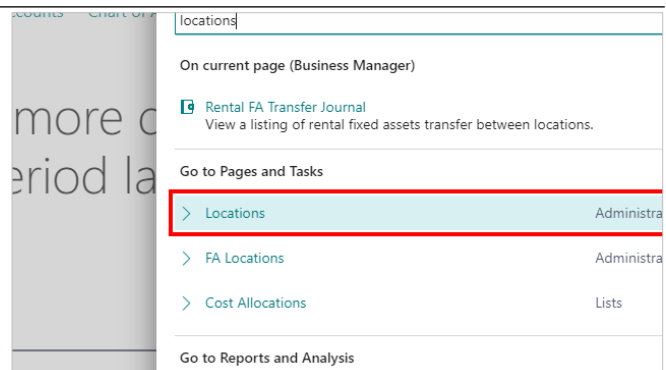
Click on the link **Tell me what you want to do.**



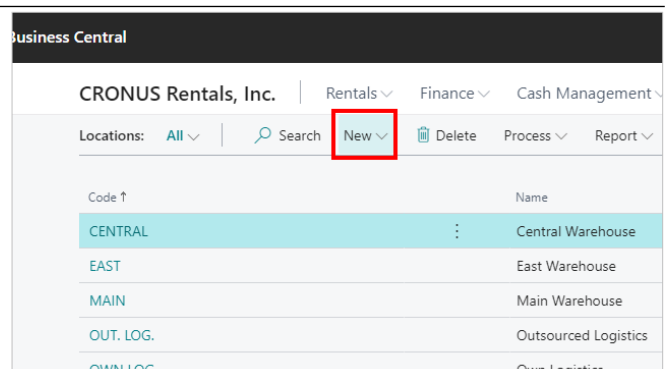
Enter the text **locations.**



Click on **Locations Administration**



Click on the link **New**





Click on the field **Code**

The screenshot shows the 'Location Card' form with tabs for 'Process', 'Location', 'Navigate', and 'Fewer options'. The 'General' section contains fields for 'Code', 'Name', and 'Use As In-Transit'. The 'Code' field is highlighted with a red box and has a red asterisk next to it. The 'Rental' section is partially visible at the bottom.

Enter the text **Temp.**

The screenshot shows the 'Location Card' form with the 'Code' field now containing the text 'Temp.'. The field remains highlighted with a red box.

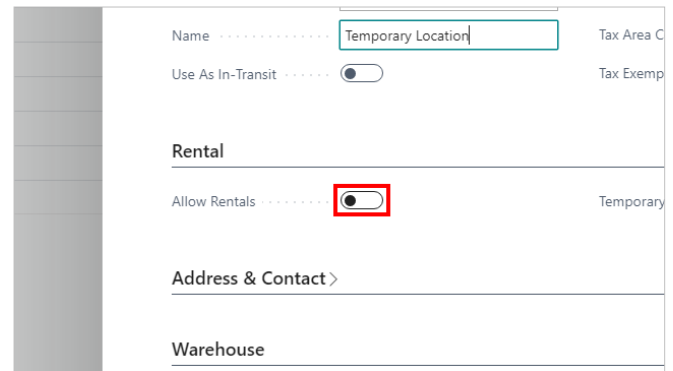
Click on the field **Name**

The screenshot shows the 'Location Card' form with the 'Name' field highlighted by a red box. The 'Code' field still contains 'Temp.'.

Enter the text **Temporary Location.**

The screenshot shows the 'Location Card' form with the 'Name' field now containing the text 'Temporary Location.'. The field remains highlighted with a red box.

Click on the toggle field Allow Rentals



Name Temporary Location Tax Area C

Use As In-Transit Tax Exemp

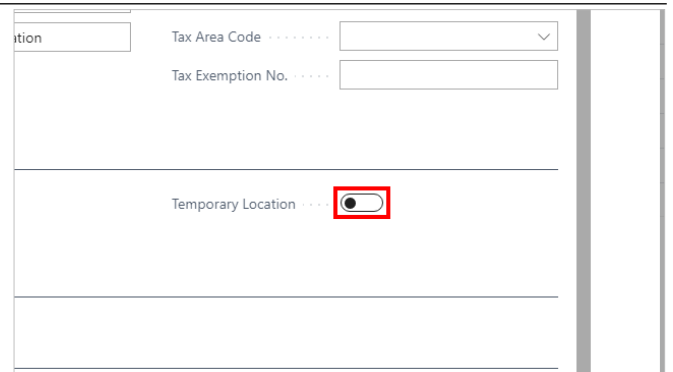
Rental

Allow Rentals ☒ Temporary

Address & Contact >

Warehouse

Click on the toggle field Temporary Location

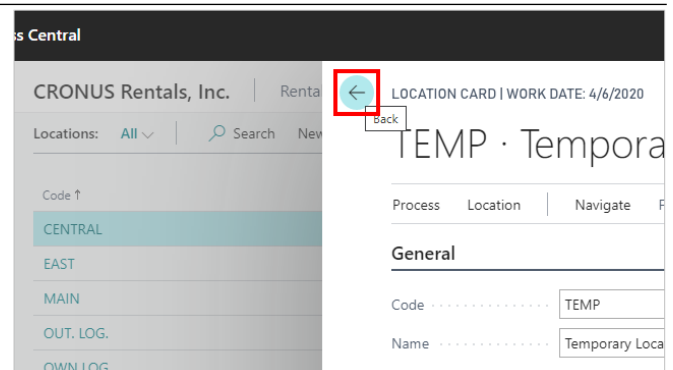


ation

Tax Area Code Tax Exemption No.

Temporary Location ☒

Click on the back button



CRONUS Rentals, Inc. | Rental

Locations: All Search New

Code ↑

CENTRAL

EAST

MAIN

OUT. LOG.

OWN LOG.

LOCATION CARD | WORK DATE: 4/6/2020

TEMP · Tempora

Process Location Navigate F

General

Code TEMP

Name Temporary Loca

2.4.4. How to Set Up an Inventory Rental Location

2.4.4.1. Overview

When Rental Units are linked to Inventory Items, then the Item Availability is used to verify the availability, when entering units linked to item on to the rental lines.

Transfer Orders are created and posted transferring the item from the source rental location to the Inventory Rental Location. This ensures that Item Ledger Entries and Item Availability by Location provides the information related to items linked to Rental Units.

For this feature, an Inventory Rental Location must be setup, and added to Rental Management Setup.

When Rental Units are linked to Inventory Items, then the Inventory Rental Location is used to facilitate the creation and posting of Transfer Orders.

A Transfer Order is created from the renting location to the Inventory Rental Location for the item. This occurs when the Rental Unit is entered on a Rental Contract, or when on a Rental Quote, the Commit Reservation is checked.

The Transfer Order, shipment and receipt, of the item are posted when the Rental Unit is shipped.

A Transfer Order is created to transfer the item back to the renting location from the Inventory Rental Location

when the rental line or contract is deleted prior to shipment, Undo Shipment is ran on the rental line or the Rental Unit is returned. The Transfer Order, shipment and receipt, are automatically posted.

NOTE:

The Transfer Order general tab has been modified to include a new field, Rental Transfer Order. This field is automatically enabled, when the order was created from a rental quote or contract.

When this field is enabled, users cannot modify the key fields on the General tab, nor can the lines be modified. In addition, the Transfer Order cannot be deleted or posted directly from the Transfer Order card. The deletion and posting is managed by actions taken on the Rental Contract.

When setting up the Inventory Location Code it should be indicative of the purpose of the location.

NOTE:

Inventory Posting Setup is required for the new Location.

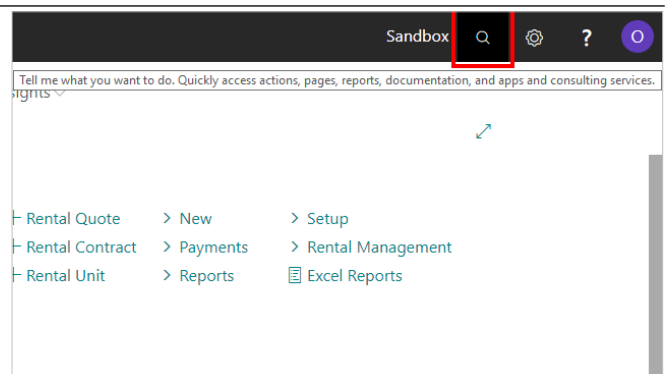
In the example provided in the following chapter, the Location will be called RENTRESERV, and the Inventory Posting Setup is included in the example.

2.4.4.2. How to Setup an Inventory Rental Location

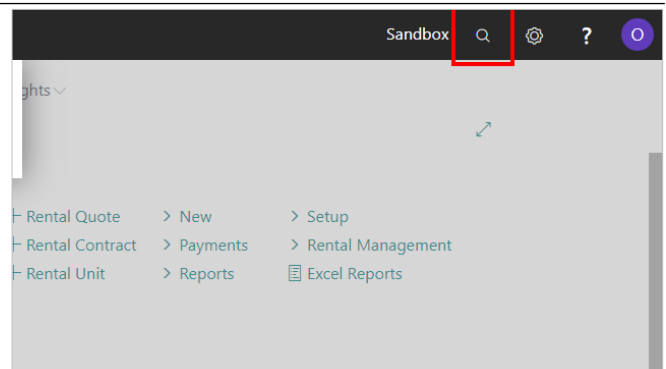
Profile - Business Manager

The following example demonstrates how to set a Location for Inventory Items linked to Rental Units, which will be used as the Location the units are transferred to.

Click on the link **Tell me what you want to do.**

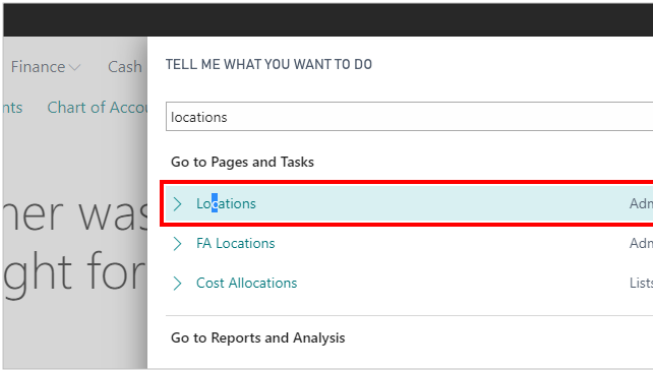


Enter the text **locations**.

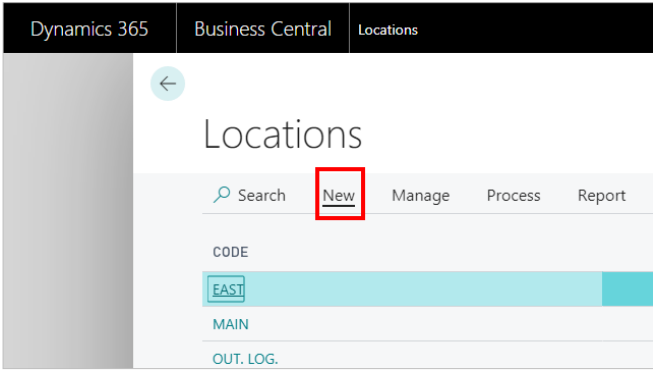




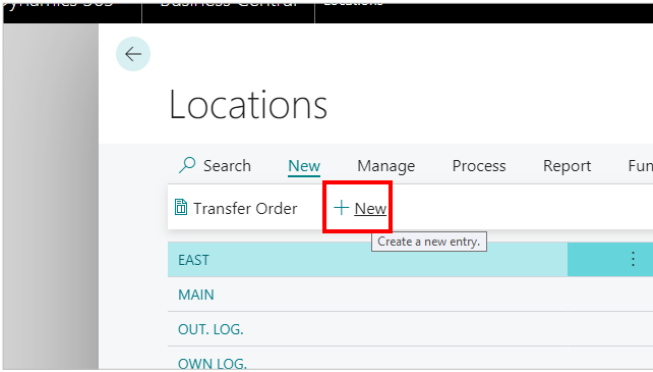
Click on **Locations Administration**



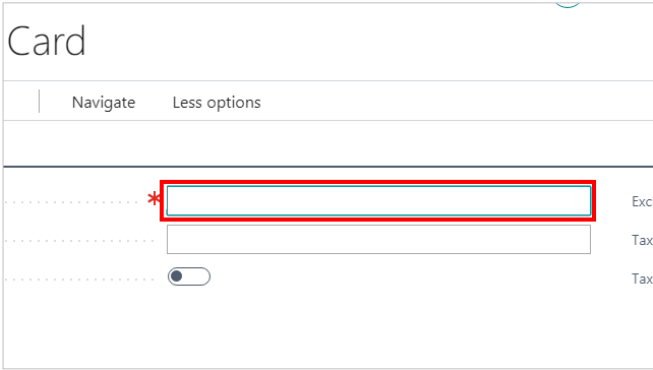
Click on the navigation menu item popup **New**



Click on the navigation menu item **New**



Click on the field **Code, (Blank)**





ODT Rentals Online Help

Enter the text **RENTRESERV.**

Enter a code that is indicative of the purpose of the location.

Card

Navigation | [Navigate](#) [Less options](#)

* R	Exc
	Tax
	Tax

Click on the field **Name**, (**Blank**)

Caru

Navigate

Less options

* RENTRESERV

Enter the text **Inventory Items Rental Reserved or On Rent.**

Enter a name for the location which provides a short definition of the purpose of the location.

LIVV

Navigate

Less options

RENTRESERV

Exc

Tax

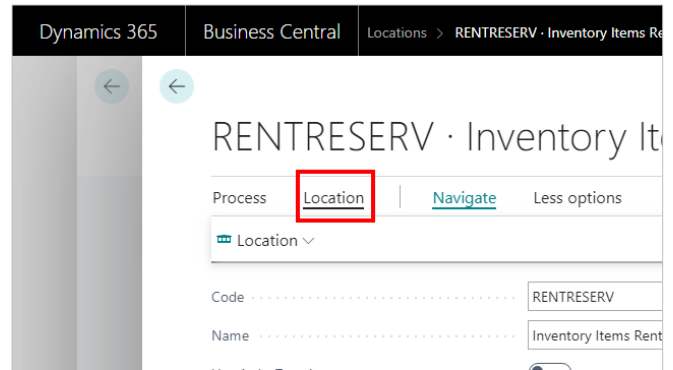
Tax

Click on **Allow Rentals, No**

The default setting on the field is No.
Clicking on the field will set the option to Yes.

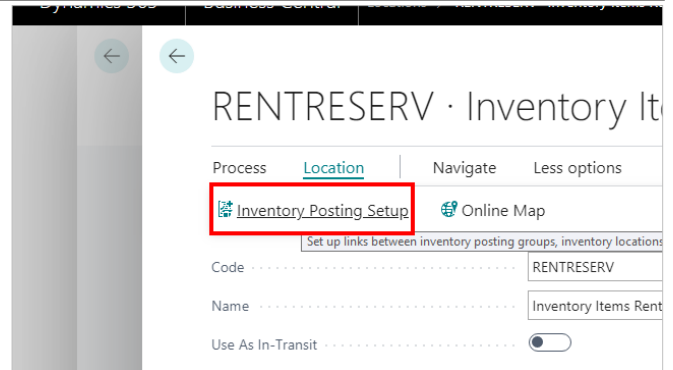
reserved or On Rent	Tax Area Code	
	Tax Exemption No.	
<div><div></div></div>		

Click on the navigation menu item popup **Location**



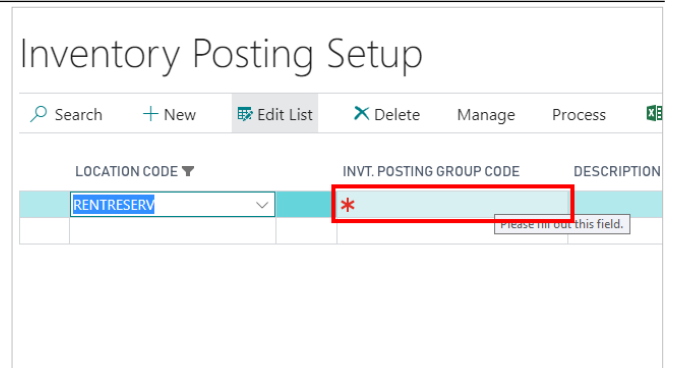
The screenshot shows the Dynamics 365 Business Central interface. The navigation pane on the left has a 'Location' menu item highlighted with a red box. The main area shows the 'RENTRESERV · Inventory Items' page with a 'Process' button and a 'Location' dropdown menu.

Click on the navigation menu item **Inventory Posting Setup**



The screenshot shows the Dynamics 365 Business Central interface. The navigation pane on the left has an 'Inventory Posting Setup' menu item highlighted with a red box. The main area shows the 'RENTRESERV · Inventory Items' page with a 'Process' button and a 'Location' dropdown menu.

Click on the cell **Invt. Posting Group Code**

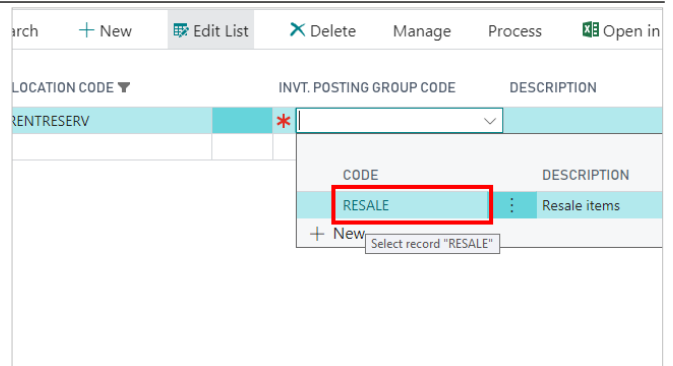


The screenshot shows the 'Inventory Posting Setup' table in Dynamics 365 Business Central. The table has columns for 'LOCATION CODE', 'INVT. POSTING GROUP CODE', and 'DESCRIPTION'. The 'INVT. POSTING GROUP CODE' cell for the first row is highlighted with a red box and contains an asterisk (*).

Click on **Code = RESALE, Description = Resale items**

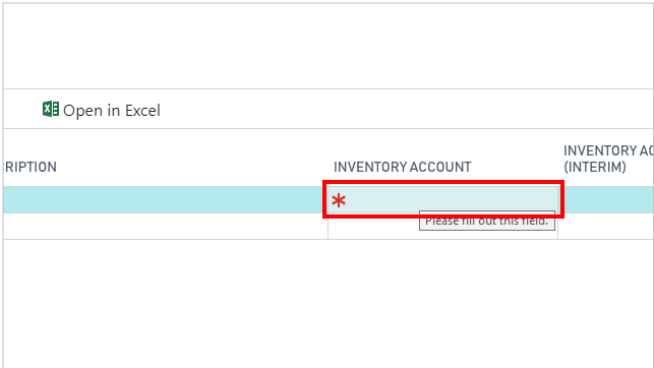
Select the applicable Invt. Posting Group Code.

Should the location be applicable to more than one Invt. Posting Group Code, then the setup must be completed for each applicable Invt. Posting Group.



The screenshot shows the 'Inventory Posting Setup' table in Dynamics 365 Business Central. The table has columns for 'LOCATION CODE', 'INVT. POSTING GROUP CODE', and 'DESCRIPTION'. The 'INVT. POSTING GROUP CODE' cell for the first row is highlighted with a red box and contains an asterisk (*). A dropdown menu is open, showing a list of codes and descriptions, with 'RESALE' and 'Resale items' highlighted in a red box.

Click on the cell **Inventory Account**

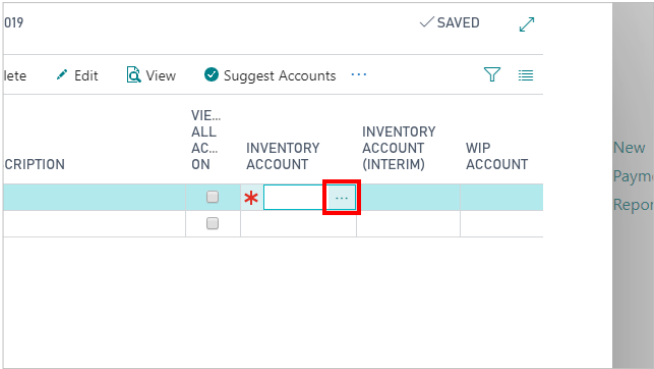


The screenshot shows a table with the following structure:

DESCRIPTION	INVENTORY ACCOUNT	INVENTORY AC (INTERIM)
	*	

A red box highlights the cell containing the asterisk (*). A tooltip below the box says "Please fill out this field."

Click on the lookup button in the cell **Inventory Account**



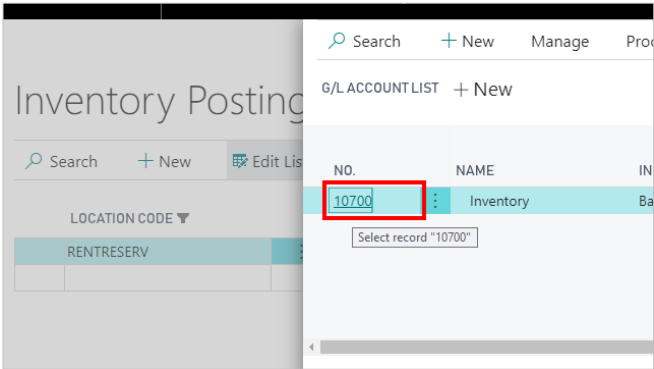
The screenshot shows a lookup window with the following structure:

DESCRIPTION	VIE... ALL AC... ON	INVENTORY ACCOUNT	INVENTORY ACCOUNT (INTERIM)	WIP ACCOUNT
		*		

A red box highlights the lookup button (three dots) in the 'INVENTORY ACCOUNT' column.

Click on the link in cell **No.** with the value **10700**

Select the applicable Inventory G/L Account.

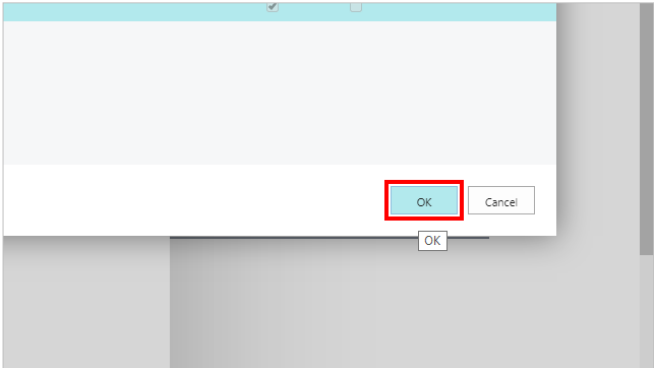


The screenshot shows a 'G/L ACCOUNTLIST' window with the following structure:

NO.	NAME	IN
10700	Inventory	Ba

A red box highlights the value '10700' in the 'NO.' column. A tooltip below the box says "Select record '10700'".

Click on the button **OK**

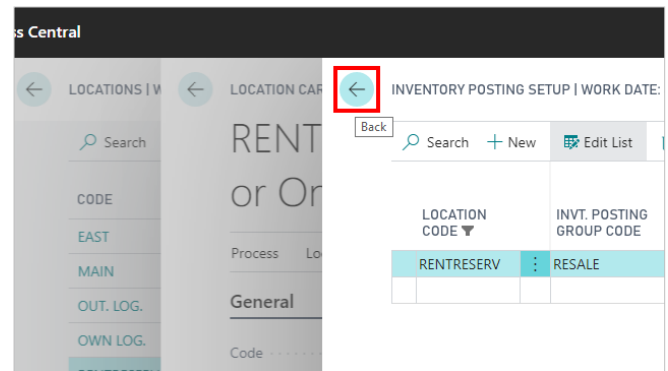


The screenshot shows a dialog box with the following structure:

OK Cancel

A red box highlights the 'OK' button.

Click on the back button



Inventory Posting Setup | WORK DATE: 4/8/2019

Back

Search + New Edit List

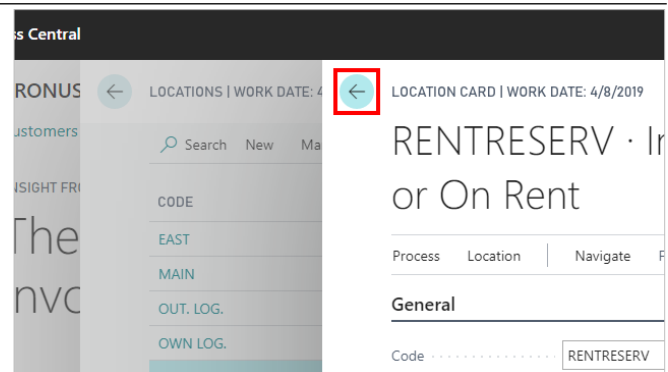
LOCATION CODE ▼

RENTRESERV

INVT. POSTING GROUP CODE

RESALE

Click on the back button



Location Card | WORK DATE: 4/8/2019

Back

Search New Manage

RENTRESERV · In-Transit

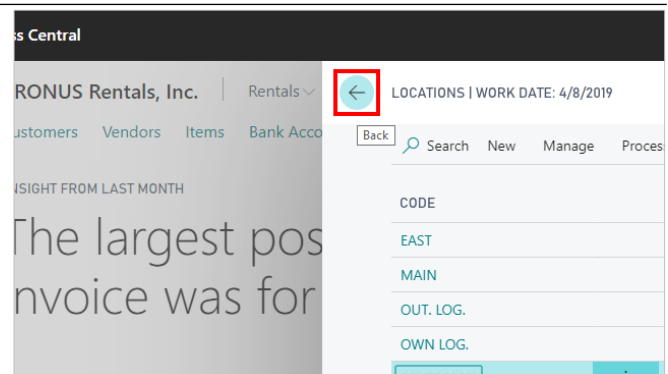
or On Rent

Process Location Navigate

General

Code RENTRESERV

Click on the back button



Locations | WORK DATE: 4/8/2019

Back

Search New Manage Process

CODE

EAST

MAIN

OUT. LOG.

OWN LOG.

Once the setup is completed, then on Rental Management Setup, in the Inventory Rentals Location field, lookup and select the Inventory Rentals Location setup in the above steps.

2.4.5. How to Set Up an Inventory Rental In-Transit Location

2.4.5.1. Overview

Some organizations have the field, Location Mandatory selected on Inventory Setup and the Location cards have the Allow Rentals field checked.

In this case, when an organization is linking Rental Units to items, then the setup of an Inventory Rentals In-Transit Location on Rental Management Setup is mandatory.

When renting out the Rental Units linked to items, then the Transfer Order created will be an indirect transfer, using the Inventory Rental In-Transit Location setup on Rental Management Setup.

This will ensure that the correct Item Ledger Entries are created and Item Availability by Location provides the information related to items linked to Rental Units, when out on rent and when returned.

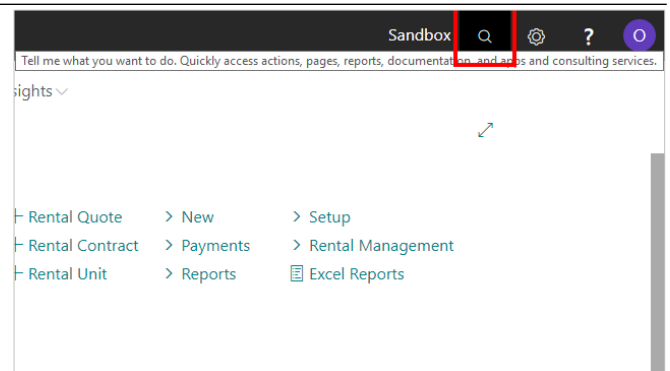
The Inventory Rental In-Transit Location can be setup as a new location or an existing In-Transit Location can be used.

2.4.5.2. How to Setup an Inventory Rental In-Transit Location

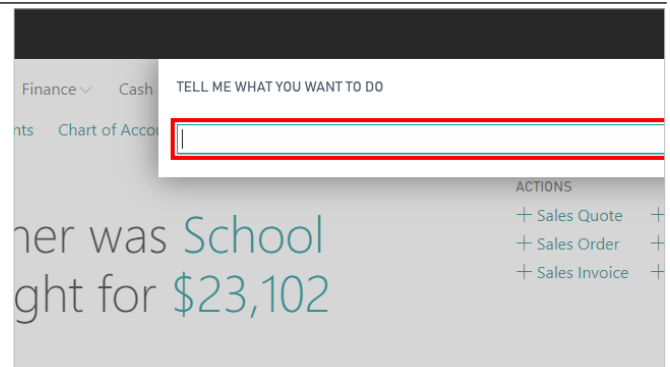
Profile - Business Manager

In the following example, a new In-Transit Location called RENT.LOG will be setup, and the Inventory Posting Setup will be setup for the new location.

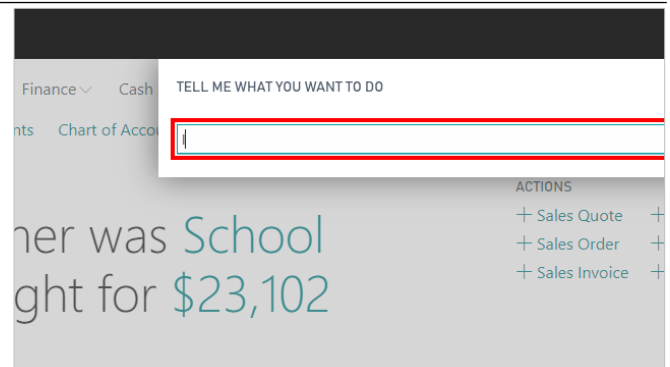
Click on the link **Tell me what you want to do.**



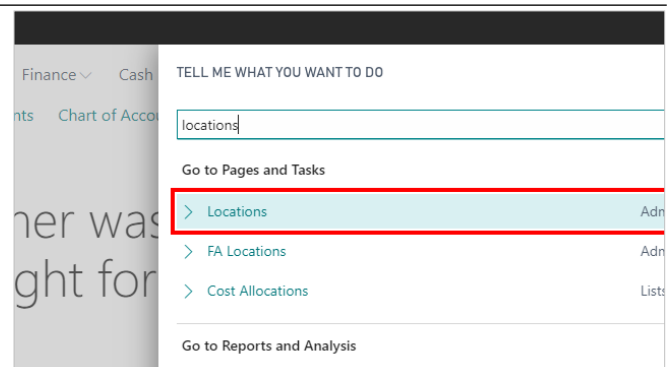
Click on the field **Type to start search:**



Enter the text **locations.**



Click on **Locations Administration**





Click on the navigation menu item popup **New**

The screenshot shows the Dynamics 365 Business Central interface. At the top, there are tabs for 'Dynamics 365', 'Business Central', and 'Locations'. Below the tabs, the 'Locations' page is displayed. In the top navigation bar, there are buttons for 'Search', 'New', 'Manage', 'Process', and 'Report'. The 'New' button is highlighted with a red box. Below the navigation bar, there is a list of locations with columns for 'CODE', 'EAST', 'MAIN', 'OUT. LOG.', and 'OWN LOG.'.

Click on the navigation menu item **New**

The screenshot shows the Dynamics 365 Business Central interface. At the top, there are tabs for 'Dynamics 365', 'Business Central', and 'Locations'. Below the tabs, the 'Locations' page is displayed. In the top navigation bar, there are buttons for 'Search', 'New', 'Manage', 'Process', 'Report', and 'Fun'. The 'New' button is highlighted with a red box. Below the navigation bar, there is a list of locations with columns for 'CODE', 'EAST', 'MAIN', 'OUT. LOG.', and 'OWN LOG.'.

Click on the field **Code, (Blank)**

The screenshot shows the Dynamics 365 Business Central 'Card' page. The 'Code' field is highlighted with a red box. The field is empty and has a red asterisk next to it, indicating it is a required field. Below the field, there is a dropdown menu with options for 'Exc', 'Tax', and 'Tax'.

Enter the text **RENT.LOG.**

Enter a code that is indicative of the purpose of the location.

The screenshot shows the Dynamics 365 Business Central 'Card' page. The 'Code' field is highlighted with a red box and contains the text 'RENT.LOG.'. The field is now filled with the text. Below the field, there is a dropdown menu with options for 'Exc', 'Tax', and 'Tax'.



ODT Rentals Online Help

Click on the field **Name**

The screenshot shows the 'General' section of the 'RENT.LOG' form. The 'Name' field is highlighted with a red box. The 'Code' field contains 'RENT.LOG'. The 'Use As In-Transit' toggle is set to 'No'.

Enter the text **Rental Item Transfers**.

Enter a name for the location which provides a short definition of the purpose of the location.

The screenshot shows the 'General' section of the 'RENT.LOG' form. The 'Name' field now contains 'Rental Transfers' and is highlighted with a red box. The 'Code' field still contains 'RENT.LOG'.

Click on **Use As In-Transit, No**

The default setting on the field is No.
Clicking on the field will set the option to Yes.

The screenshot shows the 'General' section of the 'RENT.LOG' form. The 'Use As In-Transit' toggle is highlighted with a red box. The 'Name' field contains 'Rental Transfers'.

Click on the navigation menu item popup **Location**

The screenshot shows the Dynamics 365 Business Central interface. The 'Location' menu item is highlighted with a red box. The breadcrumb trail shows 'Locations > RENT.LOG · Rental Transfers'.



Click on the navigation menu item **Inventory Posting Setup**

Dynamic ERP Business Center RENT.LOG - Rental Transfer

Process Location Navigate Less options

Inventory Posting Setup Online Map

Set up links between inventory posting groups, inventory locations, and inventory accounts.

Code RENT.LOG

Name Rental Transfers

Use As In-Transit ☒

Click on the cell **Invnt. Posting Group Code**

Inventory Posting Setup

Search + New Edit List Delete Manage Process

LOCATION CODE ▼	INVT. POSTING GROUP CODE	DESCRIPTION
RENT.LOG	*	
		Please fill out this field.

Click on **Code = RESALE, Description = Resale items**

Select the applicable Inventory Posting Group Code.

Search + New Edit List Delete Manage Process Open in

LOCATION CODE ▼	INVT. POSTING GROUP CODE	DESCRIPTION
RENT.LOG	*	

CODE	DESCRIPTION
RESALE	Resale items

+ New Select record "RESALE"

Click on the cell **Inventory Account**

Open in Excel

DESCRIPTION	INVENTORY ACCOUNT	INVENTORY ACCOUNT (INTERIM)
	*	
		Please fill out this field.



ODT Rentals Online Help

Click on the link in cell **Inventory Account**

Open in Excel

DESCRIPTION	INVENTORY ACCOUNT	INVENTORY AC (INTERIM)
	*	

Look up value

Click on the link in cell **No.** with the value **10700**

Select the applicable Inventory G/L Account.

Inventory Posting

G/L ACCOUNT LIST + New

NO.	NAME	IN
10700	Inventory	Ba

Select record "10700"

Click on the back button

Inventory Posting Setup | WORK DATE:

Back

Search + New Edit List

LOCATION CODE	INVT. POSTING GROUP CODE
RENT.LOG	RESALE

Click on the back button

LOCATION CARD | WORK DATE: 4/8/2019

Back

RENT.LOG · Rent

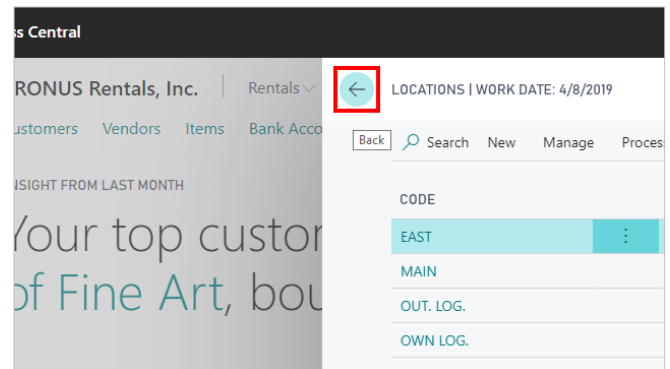
Process Location Navigate

General

Code RENT.LOG

Name Rental Item Tra

Click on the back button



Once the setup is completed, then on Rental Management Setup in the Inventory Rentals In-Transit field, lookup and select the In-Transat Location when the organization is using In-Transit Locations.

2.4.6. How to Set Up a Rental Location with Bins

2.4.6.1. Overview

Some organizations store their rental product in Bins. ODT Rentals provides the capability to rent from a location with bins and return it to the same bin.

The Rental Unit can as well be returned to the same location, but a different bin, and as well, return it to a different location and bin in that location.

To learn about processing Rental Contracts with Rental Units linked to Items located in bins, see ODT Rental Online Help, Processing Rentals, Rental Contracts with Rental Units Linked to Items, How to Process Contracts when Rental Unit Items are in Bins.

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.

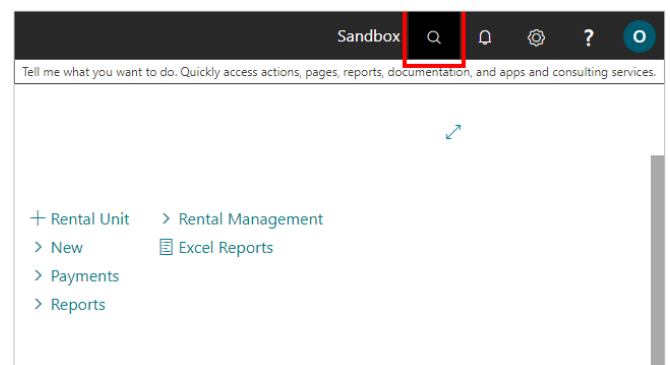
Currently separate locations for rentals and sales/purchase are required, when warehouse options other than Bins Mandatory, Default Bin Selection and the Base Calendar Code are required.

2.4.6.2. How to Set Up a Location with Bins Mandatory

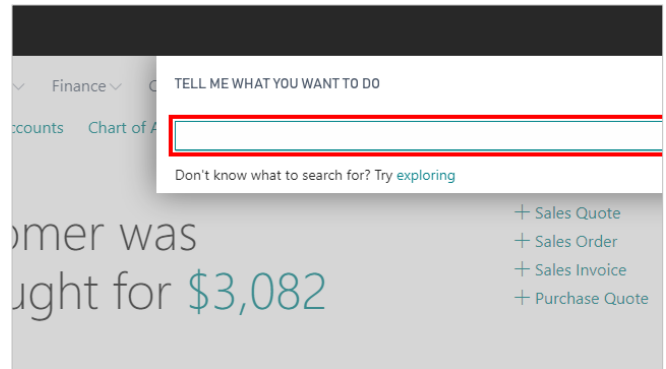
Profile - Business Manager

The following example demonstrates the setup of a Location for Rental Units linked to Items that are in Bins.

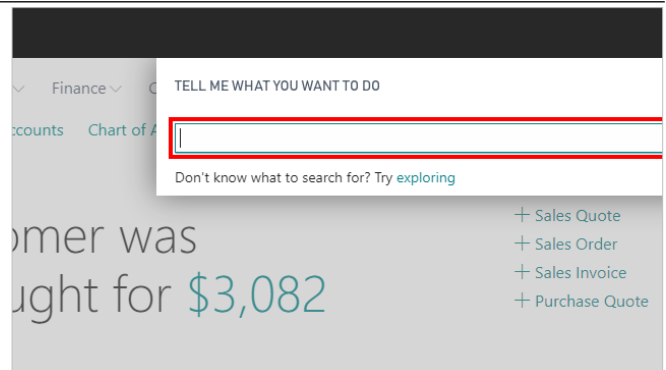
Click on the link **Tell me what you want to do.**



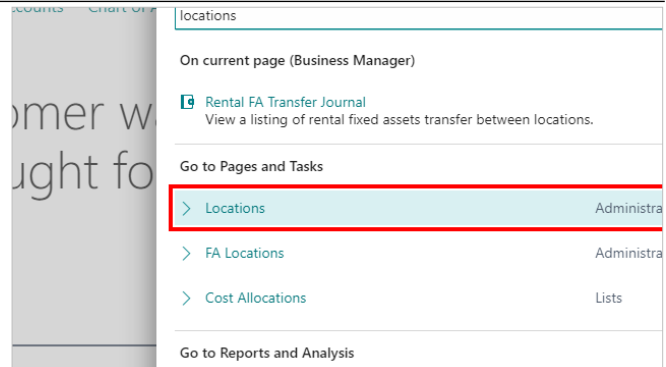
Click on the field **Type to start search:**



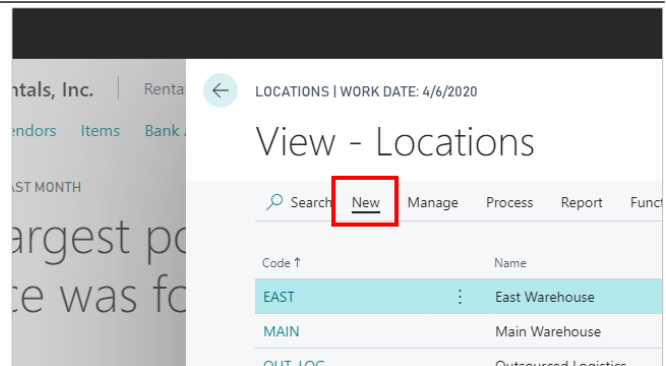
Enter the text **locations**.



Click on **Locations**

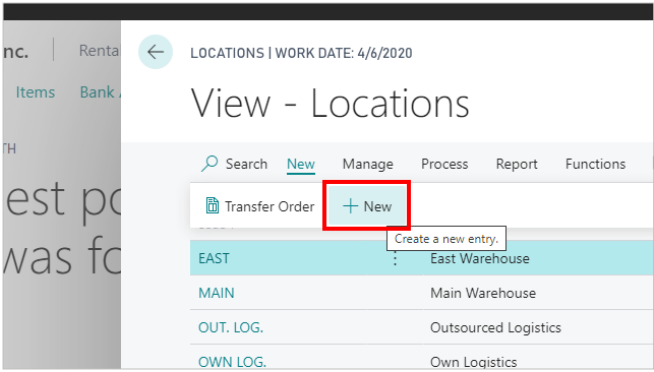


Click on the navigation menu item popup **New**

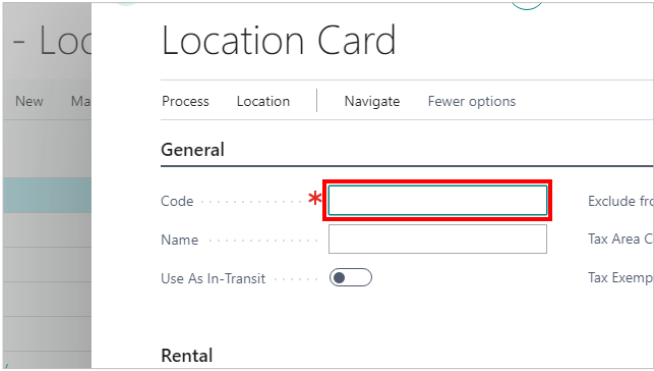




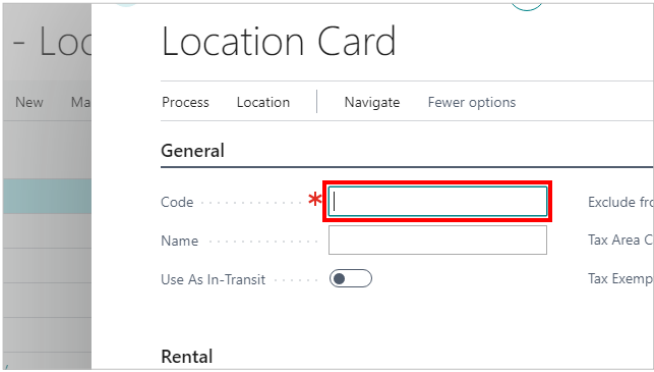
Click on the navigation menu item **New**



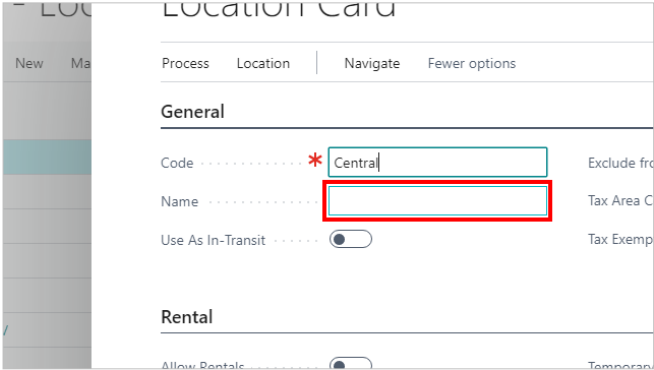
Click on the field **Code**



Enter the text **Central**.



Click on the field **Name**





Enter the text **Central Warehouse**.

Process Location Navigate Fewer options

General

Code CENTRAL Exclude fro

Name Tax Area C

Use As In-Transit ☐ Tax Exemp

Rental

Allow Rentals ☐ Temporary

Click on the toggle field Allow Rentals

Name Central Warehouse Tax Area C

Use As In-Transit ☐ Tax Exemp

Rental

Allow Rentals ☒ Temporary

Address & Contact >

Warehouse

Click on the toggle field Bin Mandatory

Require Receive ☐ Default Bir

Require Shipment ☐ Outbound

Require Put-away ☐ Inbound V

Use Put-away Works... .. ☐ Base Caler

Require Pick ☐ Customize

Bin Mandatory ☒ Use Cross-

Directed Put-away an... .. ☐ Cross-Doc

Use ADCS ☐

Bins >

Click on the field **Default Bin Selection**

temporary Location ☐

Default Bin Selection Fixed Bin Fixed Bin

Outbound Whse. Han... ..

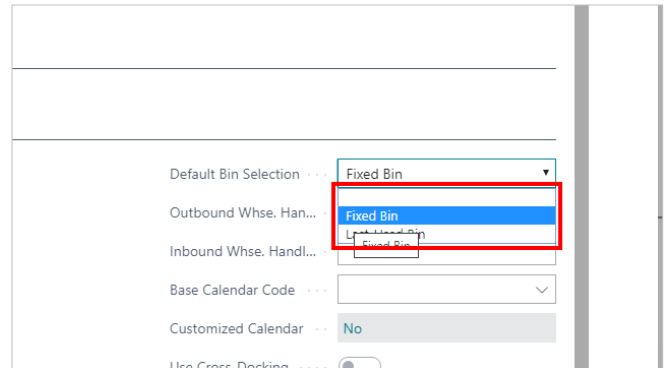
Inbound Whse. Handl... ..

Base Calendar Code

Customized Calendar No

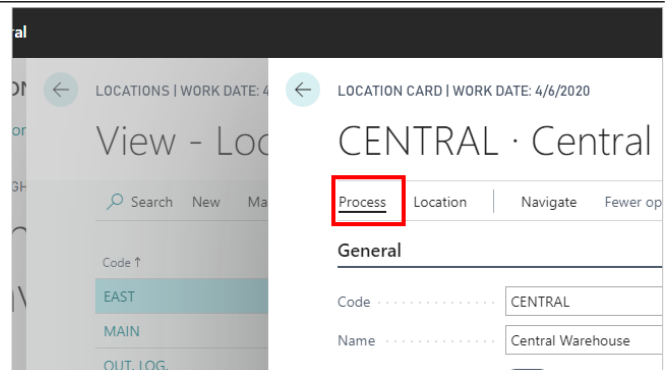
ODT Rentals Online Help

Click on the item **Fixed Bin** in the list



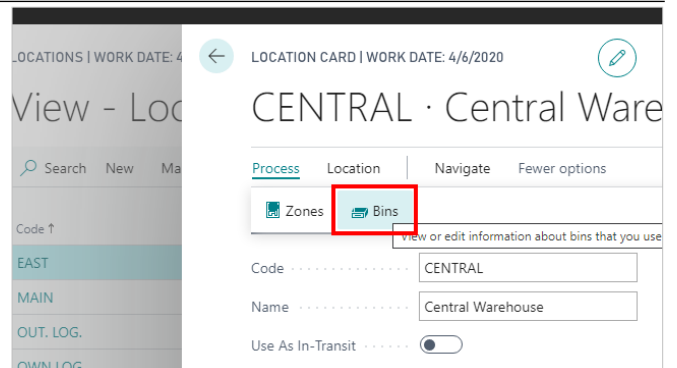
A screenshot of a web form. A dropdown menu is open, showing a list of options: 'Fixed Bin', 'Leak-Proof Bin', and 'Fixed Bin'. The first 'Fixed Bin' option is highlighted in blue. The dropdown is part of a form with other fields like 'Default Bin Selection', 'Outbound Whse. Han...', 'Inbound Whse. Hand...', 'Base Calendar Code', 'Customized Calendar', and 'Use Cross-Docking'.

Click on the navigation menu item popup **Process**



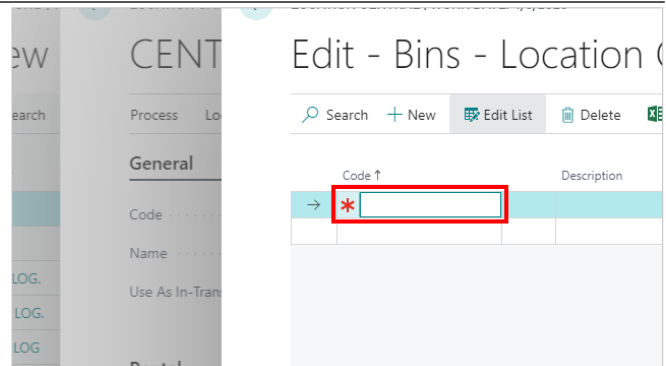
A screenshot of a 'LOCATION CARD' for 'CENTRAL · Central'. The 'Process' tab is selected and highlighted with a red box. Other tabs include 'Location', 'Navigate', and 'Fewer options'. The 'General' section shows 'Code' as 'CENTRAL' and 'Name' as 'Central Warehouse'.

Click on the navigation menu item **Bins**



A screenshot of a 'LOCATION CARD' for 'CENTRAL · Central Ware'. The 'Bins' tab is selected and highlighted with a red box. Other tabs include 'Process', 'Location', 'Navigate', and 'Fewer options'. The 'General' section shows 'Code' as 'CENTRAL' and 'Name' as 'Central Warehouse'.

Click on the cell **Code**



A screenshot of an 'Edit - Bins - Location' form. The 'Code' field is highlighted with a red box. The form includes a 'Description' field and a 'Rental' section.



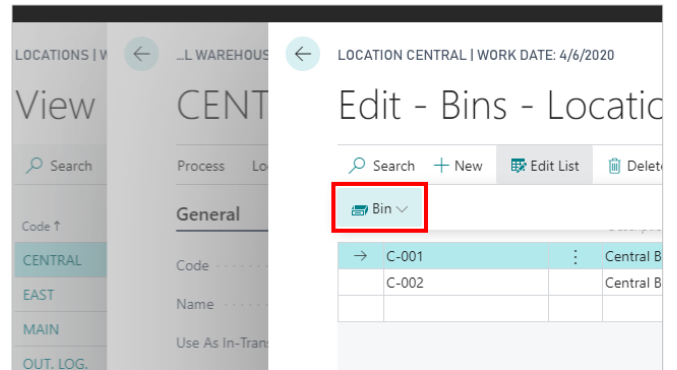
Enter the text **C-001**.

Click on the cell **Description**

Enter the text **Central Bin C-001**.

Click on the navigation menu item popup **Navigate**

Click on the navigation menu item popup **Bin**



LOCATIONS | V < L WAREHOUSE < LOCATION CENTRAL | WORK DATE: 4/6/2020

View CENTRAL

Search + New Edit List Delete

Bin

Code ↑

CENTRAL

EAST

MAIN

OUT. LOG.

General

Code

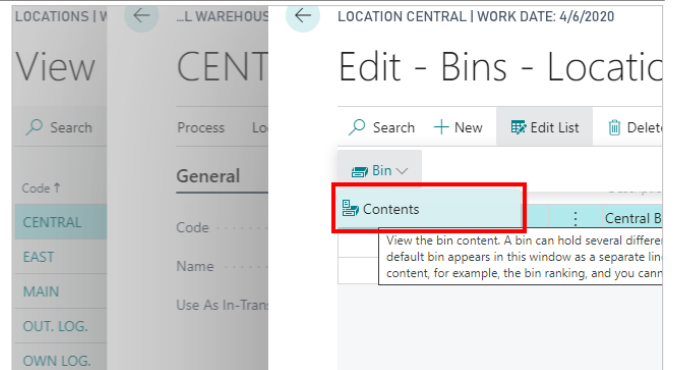
Name

Use As In-Transit

→ C-001 Central B

C-002 Central B

Click on the navigation menu item **Contents**



LOCATIONS | V < L WAREHOUSE < LOCATION CENTRAL | WORK DATE: 4/6/2020

View CENTRAL

Search + New Edit List Delete

Bin

Contents

Code ↑

CENTRAL

EAST

MAIN

OUT. LOG.

OWN LOG.

General

Code

Name

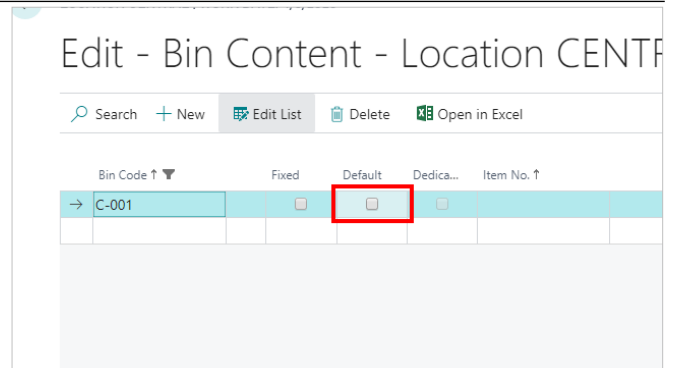
Use As In-Transit

→ C-001 Central B

C-002 Central B

View the bin content. A bin can hold several different items. A default bin appears in this window as a separate line item. For example, the bin ranking, and you can

Click on **Default**



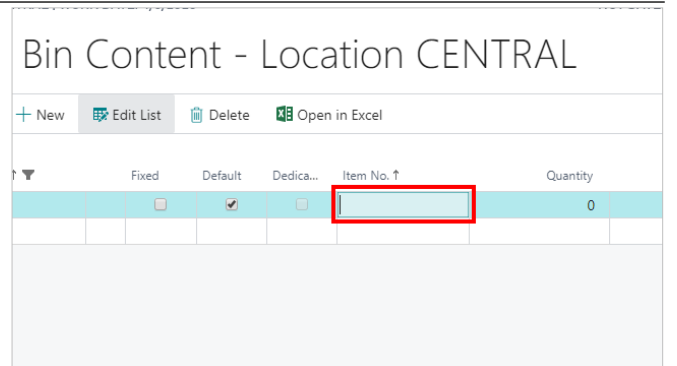
Edit - Bin Content - Location CENTRAL

Search + New Edit List Delete Open in Excel

Bin Code ↑ Fixed Default Dedic... Item No. ↑

→ C-001

Click on the cell **Item No.**



Bin Content - Location CENTRAL

+ New Edit List Delete Open in Excel

Fixed Default Dedic... Item No. ↑ Quantity

0



ODT Rentals Online Help

Click on the link in cell **No.** with the value **1001**

Fixed	Default	Dedica...	Item No. ↑	Quantity	Qua
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	
No. ↑	Description		Ba Me		
→ 1000	Portable Generators		PC		
1001	Wacker Hammer Drill Bits 3/16...		PC		
1002	Select record "1001" mmer Drill Bits 3-Fla...		PC		
1003	Air Impact Wrench, 1 in.		PC		
1004	Air Impact Wrench, 1/2 inch		PC		
1005	AIR IMPACT WRENCH		PC		
+ New					

Click on the back button

LOCATION CENTRAL	←	LOCATION CENTRAL | WORK DATE: 4/6/2024
View	CEI	Edit
Search	Process	Search
Code ↑	General	Bin Code ↑ Fixed
CENTRAL		→ C-001

Click on the cell **Code**

NEW	CENTRAL	Edit - Bins - Location C
Search	Process	Search + New Edit List Delete
General		
Code	Code	Description
→ C-001		Central Bin C-00
Rental		

Enter the text **C-002**.

NEW	CENTRAL	Edit - Bins - Location C
Search	Process	Search + New Edit List Delete
General		
Code	Code	Description
→ C-001		Central Bin C-00
Rental		



Click on the cell **Description**

Bins - Location CENTRAL			
New Edit List Delete Open in Excel Navigate Fewer options			
	Description	Empty	
	Central Bin C-001	<input checked="" type="checkbox"/>	
2		<input checked="" type="checkbox"/>	

Enter the text **Central Bin C-002**.

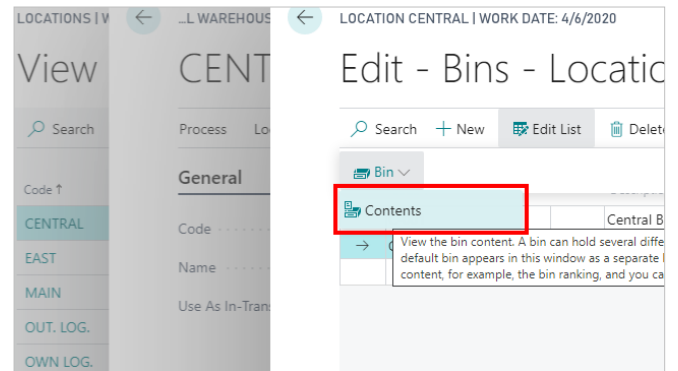
Bins - Location CENTRAL			
New Edit List Delete Open in Excel Navigate Fewer options			
	Description	Empty	
	Central Bin C-001	<input checked="" type="checkbox"/>	
	<input type="text" value="C-002"/>	<input checked="" type="checkbox"/>	
1			

Click on the navigation menu item popup **Navigate**

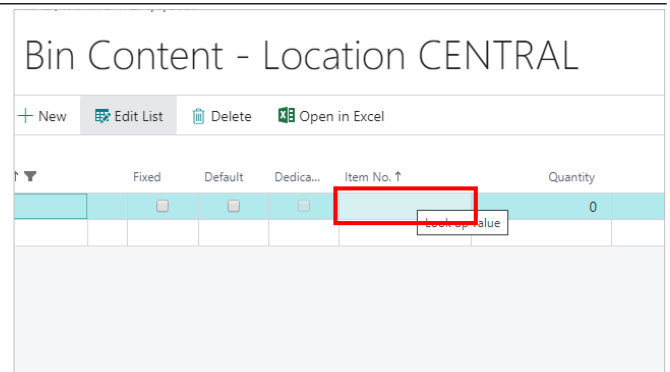
DATE: 4/6/2020			
- Location CENTRAL			
Edit List Delete Open in Excel Navigate Fewer options			
	Description	Empty	Dedicated
	Central Bin C-001	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Central Bin C-002	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on the navigation menu item popup **Bin**

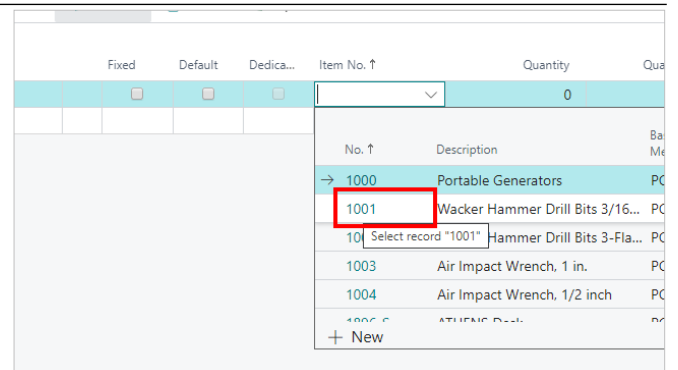
Click on the navigation menu item **Contents**



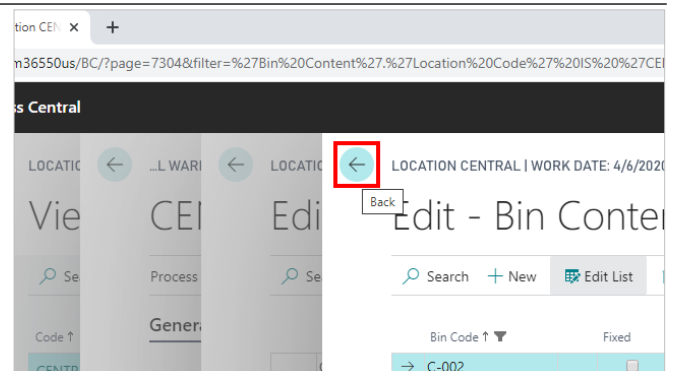
Click on the cell **Item No.**



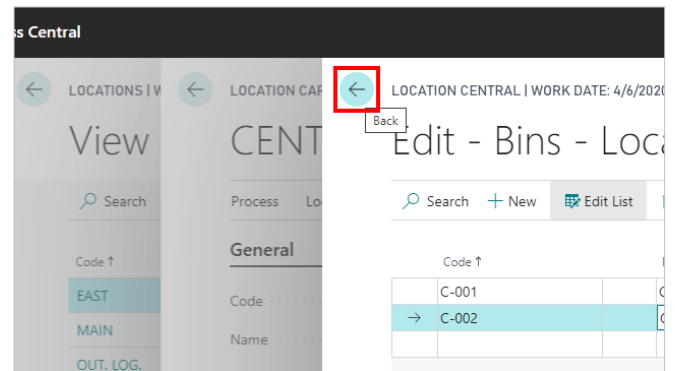
Click on the link in cell **No.** with the value **1001**



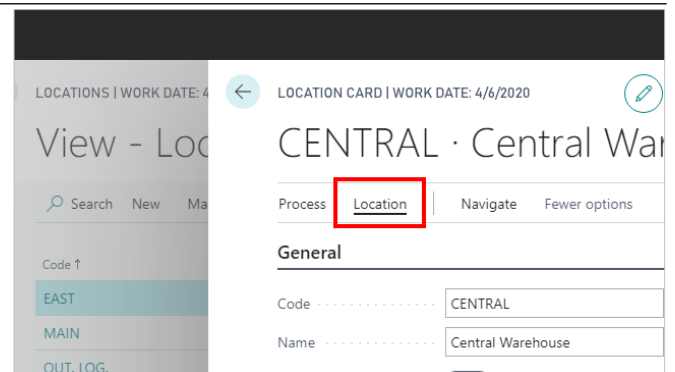
Click on the back button



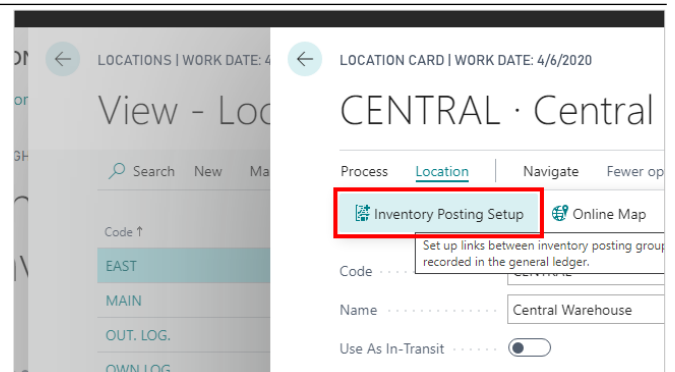
Click on the back button



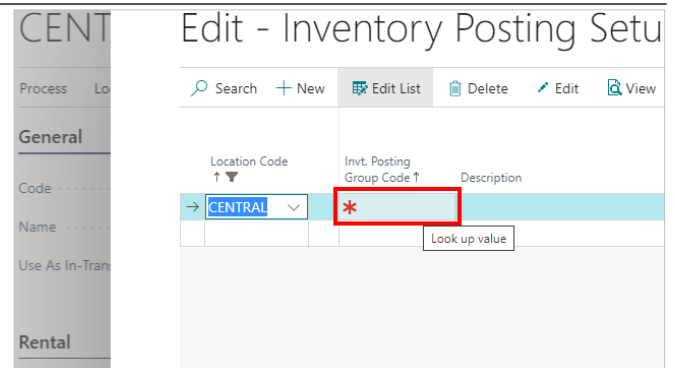
Click on the navigation menu item popup **Location**



Click on the navigation menu item **Inventory Posting Setup**



Click on the cell **Invt. Posting Group Code**





Click on the link in cell **Code** with the value **RESALE**

Location Code	Invt. Posting Group Code	Description	View All Acc...
CENTRAL	*		

Code

RESALE

+ New

Select record "RESALE"

Code	Description
RESALE	Resale items

Click on the cell **Inventory Account**

Description	View All Acc...	Inventory Account	Inventory Account (Interim)	WIP Account
		*		

Look up value

Click on the lookup button in the cell **Inventory Account**

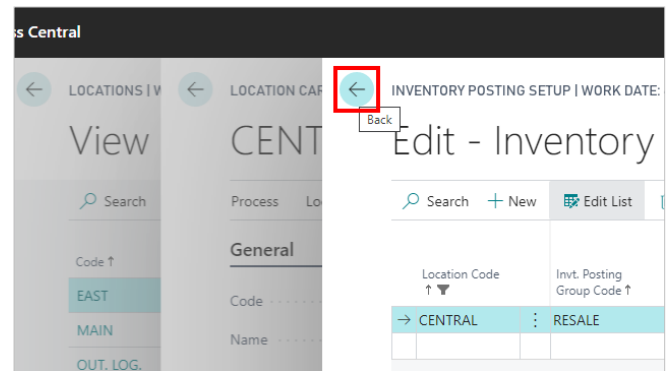
Description	View All Acc...	Inventory Account	Inventory Account (Interim)	WIP Account
		*		

Look up value

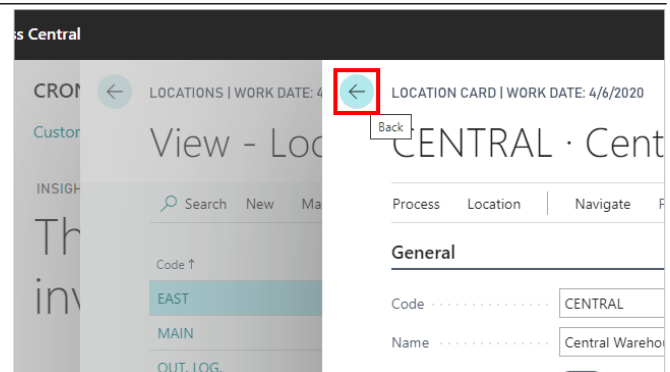
Click on the link in cell **No.** with the value **10700**

No.	Name
10700	Inventory

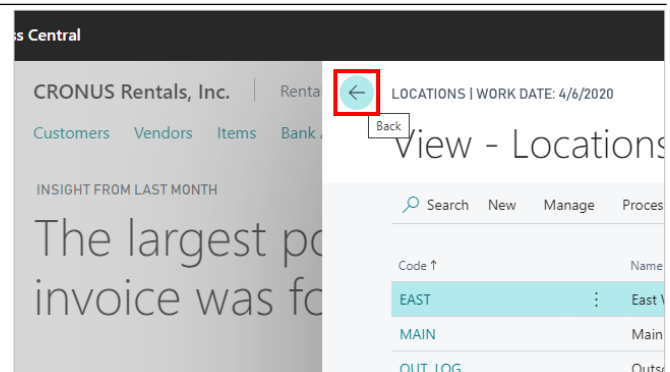
Click on the back button



Click on the back button



Click on the back button



Should any field other than Bin Mandatory be activated on the Warehouse tab, an error will occur when closing the Location card.

The following is an example of the error when the Require Receive field was activated when the Allow Rentals is activated.

"Allow Rentals is not allowed when Require Receive field is enabled on the Warehouse tab. Only Bin Mandatory, Default Bin Selection and Base Calendar Code are allowed with rentals."

2.5. Setup Rental Periods

2.5.1. Rental Periods Overview

2.5.1.1. Overview

Rental Periods are a key component in the pricing and invoicing functionality of Rental Management. Rental Periods are pre-defined time periods over which rentals can occur and are defined by organization.

These rental periods can be based on the following methods:

The length of rental period (Period Length) which are defined with standard date formulas. Information on date formulas, is provided later in this help.

When an organization tracks the rental contracts based on lapsed dates/time from the start of the rental to the return of the rental, then rental periods can be setup based on the duration of the rental contract (Period Duration).

Organizations can give these periods any name they wish and have freedom in how they are defined.

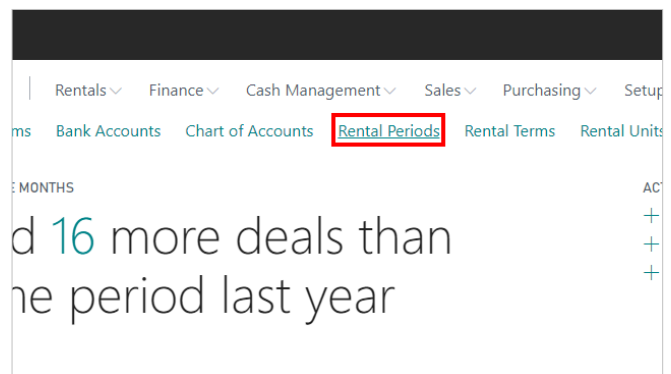
Common rental periods are Day, Week and Month.

Examples of a week could be five days, seven days or one week. A month could be defined in a number of different ways, including one calendar month, twenty-eight days, or thirty days.

2.5.1.2. Rental Period Field Definitions

The Rental Periods can be accessed using the following step.

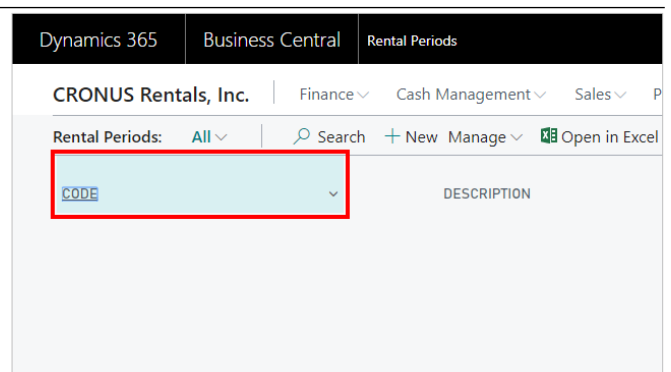
Click on the navigation menu item **Rental Periods**



The following steps will enable the user to review the primary purpose of the fields in the Rental Period list.

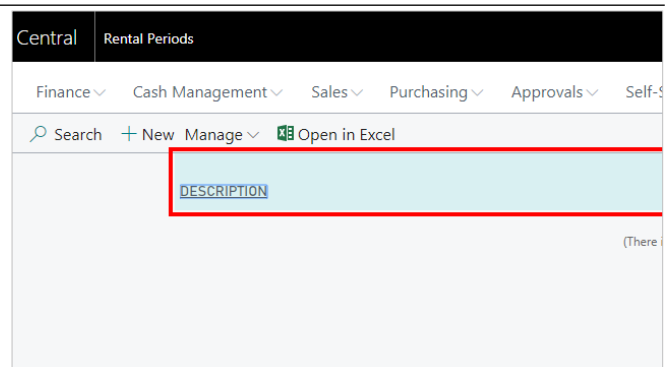
Click on the column header **Code**

This field is used to specify a code for the rental period. This is a 10 character alphanumeric field, in which a unique code is entered to represent the rental period.



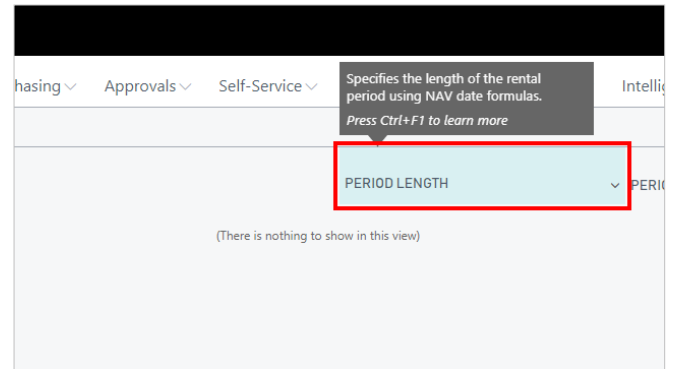
Click on the column header **Description**

This field is used to specify a description indicative of the rental period being setup.



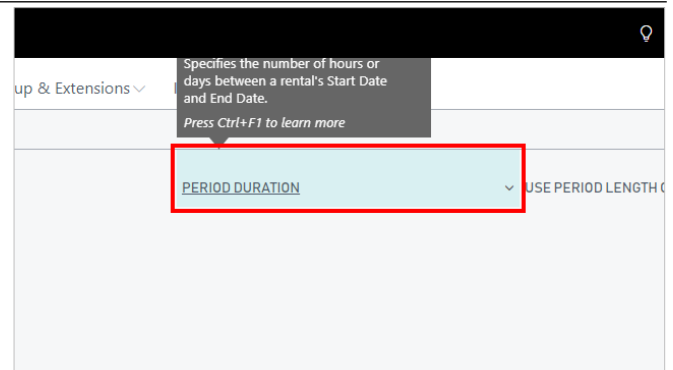
Click on the column header **Period Length**

This field is used to specify the length of the rental period using Dynamics 365 Business Central date formulas. This formula is used for the calculation of the invoicing periods, and the default Rental Return Date.



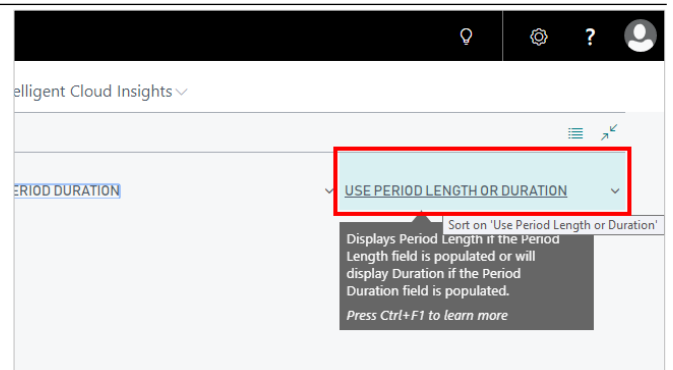
Click on the column header **Period Duration**

This field is used to specify the number of hours or days between a rental Start Date and End Date when rentals are tracked on time out and time returned. This entry here is used for the calculation of Rental return date and time.



Click on the column header **Use Period Length or Duration**

This field displays whether the rental period is based on Period Length or Duration and is used in calculations throughout the rentals processing.



2.5.1.3. Dynamics 365 Business Central Date Formulas

The following picture is a listing of commonly used Period Length Formulas.

Period Length Formula Examples	
Formula	Explanation of Formula
1D	1 Day
30D	30 Days
1M	1 Month
3M	3 Months, which can be used for quarterly periods
1W	1 Week
4W	4 Weeks
1Y	1 Year

2.5.2. How to Set Up Rental Periods Based on Period Length

The following demonstrates the steps to be used when setting up Rental Periods based on Period Length.

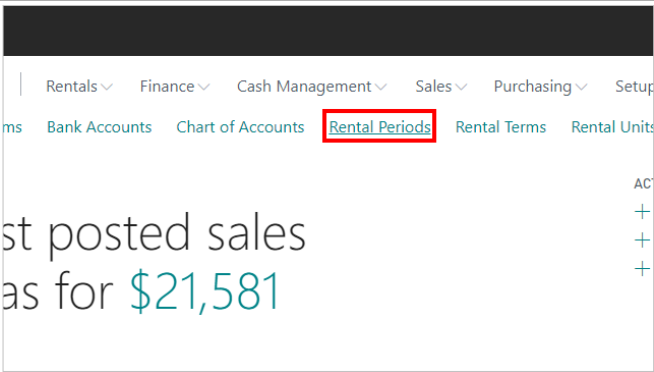
This example covers the setup of a daily rental period.



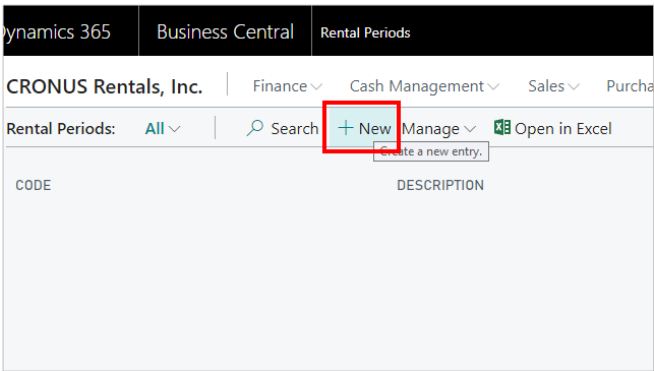
2.5.2.1. Setup Rental Periods Based on Period Length

Profile - Business Manager

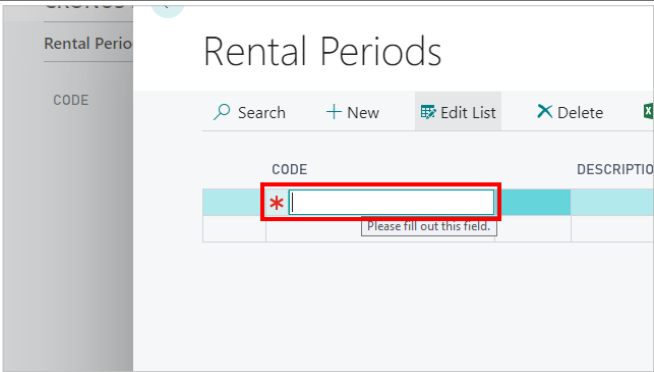
Click on the navigation menu item **Rental Periods**



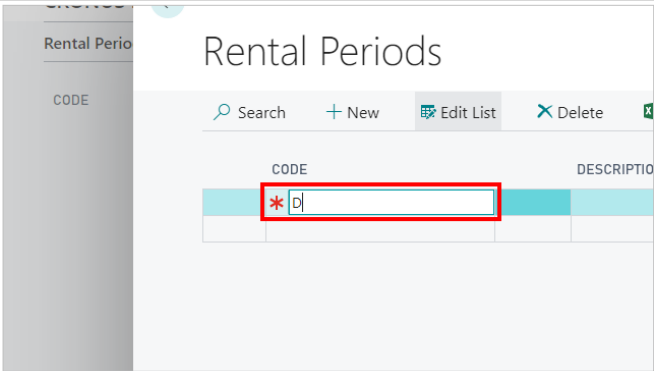
Click on the navigation menu item **New**



Click on the cell **Code**



Enter the text **Day**.





ODT Rentals Online Help

Click on the cell **Description**

ds

Edit List Delete Open in Excel		
	DESCRIPTION	PER

Enter the text **Day**.

ds

Edit List Delete Open in Excel		
	DESCRIPTION	PER
	:	D

Click on the cell **Period Length**

in Excel

	PERIOD LENGTH	PERIOD DURAT

Enter the text **1D**.

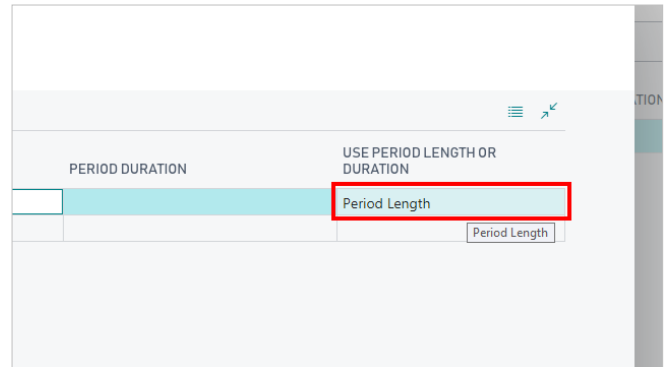
in Excel

	PERIOD LENGTH	PERIOD DURAT
	1	

Click on the cell **Use Period Length or Duration** with the value **Period Length**

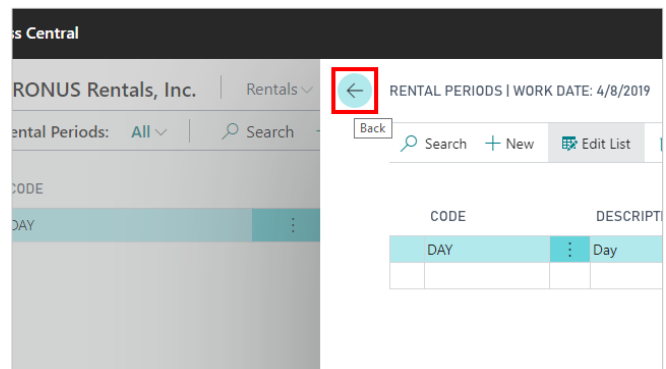
Note that the Use Period Length or Duration field is automatically set to Period Length.

This field cannot be edited.



Repeat the above steps for each pre-defined period over which rentals can occur and are defined by organization.

Click on the back button



2.5.3. How to Set Up Rental Periods Based on Period Duration

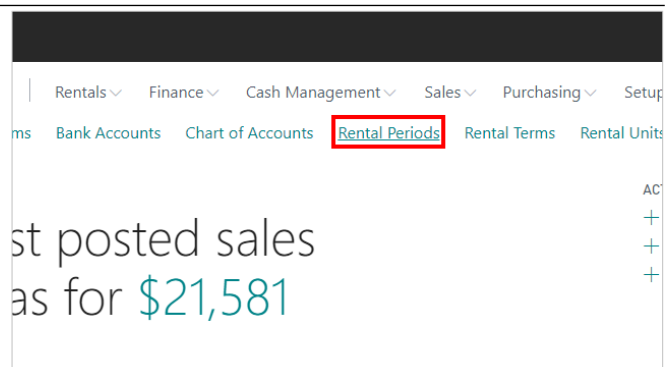
The following steps are to be used when setting up Rental Periods based on Period Duration.

2.5.3.1. Setup Rental Periods Based on Period Duration

Profile - Business Manager

This example demonstrates setting up a period for a 2 hour rental duration.

Click on the navigation menu item **Rental Periods**





Enter the text **2HR.**

Rental Periods > Rental Periods

Periods

Edit List

Delete

Open in Excel

	DESCRIPTION
	28 Days
	Day
	Month

Click on the cell **Description**

Periods

Edit List

Delete

Open in Excel

	DESCRIPTION	PER
	28 Days	28D
	Day	1D
	Month	1M
	Week	1W

Enter the text **2 Hours.**

Periods

Edit List

Delete

Open in Excel

	DESCRIPTION	PER
	2	
	28 Days	28D
	Day	1D
	Month	1M
	Week	1W

Click on the cell **Period Duration**

	PERIOD LENGTH	PERIOD DURATION	USE PE DURATI
			Period
	28D		Period
	1D		Period
	1M		Period
	1W		Period

Enter the text **2 hours**. Press the **Enter** key.

PERIOD LENGTH	PERIOD DURATION	USE PE DURATI
	2	Period
28D		Period
1D		Period
1M		Period
1W		Period

Click on the cell **Use Period Length or Duration** with the value **Duration**

Notice that when the Period Duration is entered, the field Use Period Length or Duration is automatically set to Duration.

PERIOD DURATION	USE PERIOD LENGTH OR DURATION
2 hours	Duration
	Period
	Period Length
	Period Length
	Period Length

Repeat the above steps for each pre-defined period which is based on time as defined by your organization.

Click on the back button

s Central	
RONUS Rentals, Inc. | Rentals	← RENTAL PERIODS | WORK DATE: 4/8/2019
Rental Periods: All | Search	Back Search + New Edit List
CODE	CODE
DAY	2HR 2 Hours
MONTH	DAY Day
WEEK	MONTH Month
2HR	WEEK Week

Press the **Esc** key.

Business Central	Rental Periods
ls, Inc. | Finance | Cash Management	Sales | Purchasing | Approval
All | Search + New Manage	Open in Excel
DESCRIPTION	
28 Days	
Day	
Month	
Week	
2 Hours	

2.6. Setup Rental Terms

2.6.1. Rental Terms Overview

2.6.1.1. Overview

Rental Management uses Rental Terms to enable various invoicing strategies.

The use of Rental Terms requires the setup of valid Rental Periods. A unique term must be set up for each different invoicing schema required.

An Invoicing Type is utilized to specify when rental billing is to occur and provides for a variety of options outlined in the Main Invoicing Strategies chapter.

NOTE:

In addition to the Invoicing Type for managing when invoicing is to occur, the feature Billing Cycle Types provides additional invoicing strategies for billing based on billing cycles.

To learn about the Billing Cycle Types feature, see ODT Rentals Online Help, Processing Rentals, Rental Contracts Using Billing Cycle Types.

Pricing calculations can be configured for a variety of scenarios.

Please review the examples provided on rental term set up for a variety invoicing strategies.

2.6.1.2. Main Invoicing Strategies

A summary of the main invoicing strategies is provided here.

- **End:** The customer will be billed for the full contract at the end of the contract when the rental unit(s) are returned.
- **Start:** The customer will be billed for the full contract at the beginning of the contract.
- **Periodic End:** The customer is invoiced on the final day of the first rental period and then invoiced at the end of each subsequent full or partial rental period.
- **Periodic Start:** The customer is invoiced on the first day of the first rental period and then invoiced at the beginning of each subsequent full or partial rental period.

Proration:

When used, the customer receives a reduced price rate if he or she opts for a longer or shorter rental length than the period assigned to the rental term entered on the rental quote or contract.

Optimization:

Optimization provides flexible pricing. The pricing calculation selects rental price(s) that total the lowest rental amount – a best price practice. This best price calculation is used when the rental length is either shorter than or exceeds the rental period assigned to the rental term entered on the rental quote or contract.

Hybrid Hourly:

This invoicing strategy provides the capability to link rental terms to another term, enabling a cascading of terms until a Rental Term is reached that the contract duration falls within or reaches a rental term that does not have a linked Rental Term specified.

Additionally rentals can be configured for tracking rentals by date only or by tracking by date and time.

- Tracking by Date Only considers renting to be based on date only. Time out and time returned is

not tracked.

- Tracking by Date and Time tracks rentals from the time the unit has been rented out until the time the unit has been returned.

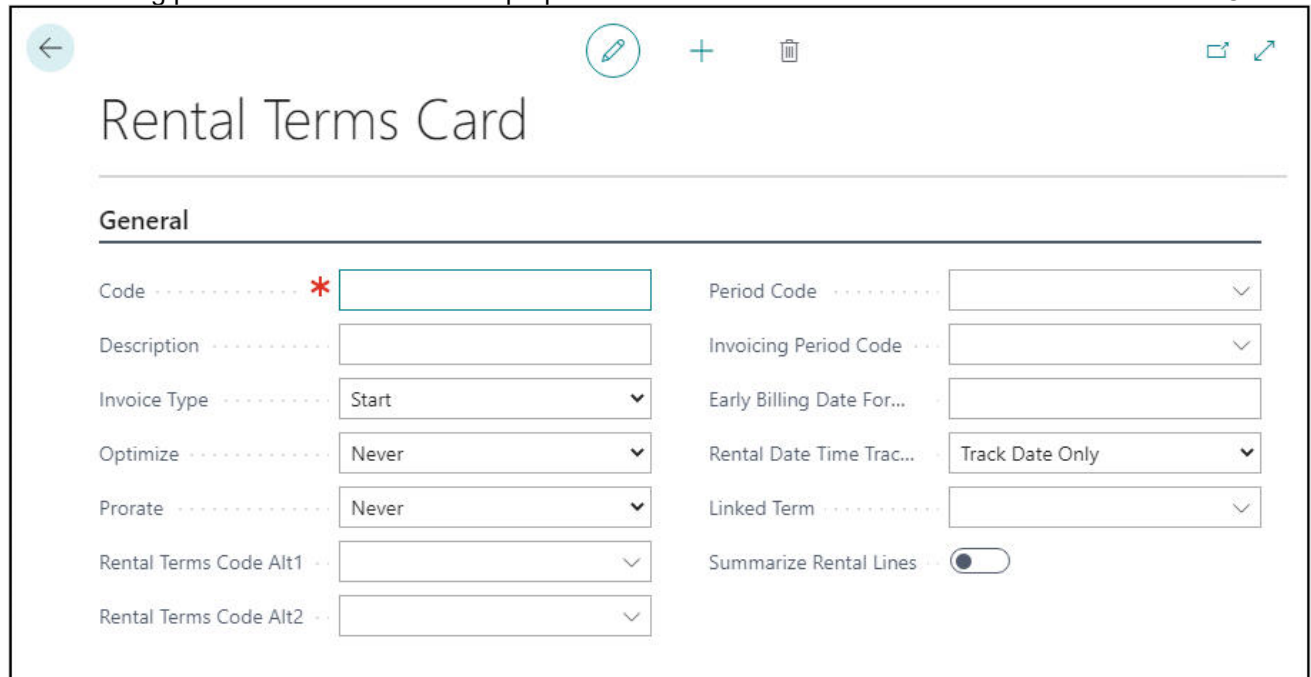
Early Billing:

ODT Rentals provides the ability to configure rental terms with an early billing date formula, which enables the ability create invoices early from both the Rental Contract and from the Rental Invoicing Worksheet.

This strategy is especially useful for organizations which invoice the rentals in advance of when the rental period starts. Thus ensuring their customers have the invoice before the next rental period commences. The posting date of the entries created by this strategy are set to the early billing date.

2.6.1.3. Rental Term Card Field Definitions

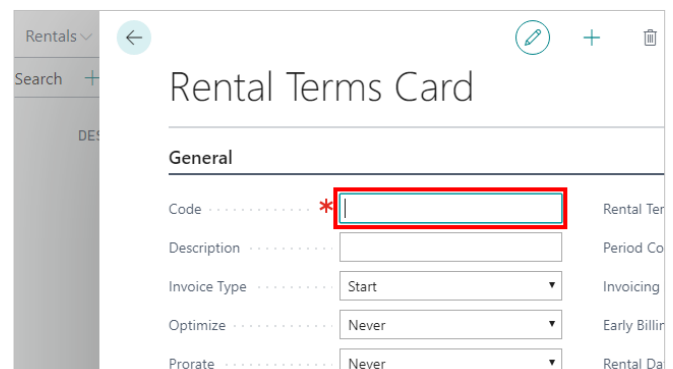
The following provides an overview of the purpose and use of the individual fields on the Rental Terms Card.



The screenshot shows the 'Rental Terms Card' form. At the top, there are navigation icons: a back arrow, a pencil (edit), a plus sign (add), and a trash can (delete). The title 'Rental Terms Card' is prominently displayed. Below the title, the 'General' tab is selected. The form contains several fields arranged in two columns. The left column includes 'Code' (with a red asterisk indicating it is required), 'Description', 'Invoice Type' (set to 'Start'), 'Optimize' (set to 'Never'), 'Prorate' (set to 'Never'), 'Rental Terms Code Alt1', and 'Rental Terms Code Alt2'. The right column includes 'Period Code', 'Invoicing Period Code', 'Early Billing Date For...' (empty), 'Rental Date Time Trac...' (set to 'Track Date Only'), 'Linked Term', and a 'Summarize Rental Lines' toggle switch which is currently turned off.

Click on the field **Code**

Specifies the code for the rental term. This field is a 10 character alphanumeric field, which represents the rental term throughout rentals.



This is a close-up view of the 'Code' field from the 'Rental Terms Card' form. The field is a text input box, currently empty, and is highlighted with a red rectangular border. A red asterisk is placed to the left of the field, signifying that it is a required field. The background shows a portion of the application's sidebar with 'Rentals' and 'Search' options.

Click on the field **Description**

Specifies a description of the rental term. This field is a 100 character field for describing the term being setup up.

Card

EMONTH

Start

Never

Never

(Alt-Up) Show tooltip

Click on the field **Invoice Type**

There are four Invoice Types available for selection.

Start:

The customer is invoiced for the entire rental contract at the beginning of the contract.

Periodic Start:

The customer is invoiced on the first day of the first rental period, and then invoiced at the beginning of each subsequent full or partial rental period.

End:

The customer is invoiced for the entire rental contract upon the return of the rental units.

Periodic End:

The customer is invoiced on the final day of the first rental period and then invoiced at the end of each subsequent full or partial rental period.

Card

EMONTH

Start

Never

Never

Start

Click on the field **Optimize**

Specifies whether optimization will applied to the rental term and subsequent rental pricing calculation.

The optimize field is a conditional application with 2 options.

Never:

This value prevents any optimization from occurring. For example, if a customer rents a unit for 2 weeks but returns it after 10 days, the customer is still charged for 2 weeks.

All Periods:

With this option, the pricing calculation will consider all prices and will select the rental price(s) that calculate the lowest total rental amount. The alternative rental terms are used in the pricing calculation to determine the best price to be billed to the customer. For example, if a customer rents a unit for 1 month and 10 days, the system will calculate the price based on 1 month, 1 week and 3 days using the prices on the alternative terms.

Card

EMONTH

Start

Never

Never

Never



ODT Rentals Online Help

Click on the field **Prorate**

Specifies whether proration will apply to the rental term and subsequent rental pricing calculation.

The Prorate field is a conditional application with 2 options.

Never:
This value prevents any prorating from occurring. For example, if a customer rents a unit for 2-weeks but returns it after 8-days, the customer is still charged for 2 weeks.

All Periods:
This enables you to prorate at any time during the rental. For example, if a customer rents a unit for 2-weeks with the Rental Price being a weekly price, but returns it after 8-days, the customer is charged for 1-week plus 1/7-th of a week. Instead of one week plus one day, which would likely be more expensive.

Click on the field **Rental Terms Code Alt1**

The Rental Term Code Alt1 can be specified in the fields for a particular rental term. Once the field is populated for a rental term and that rental term is selected on the rental order line, then this term will automatically default to the rental order line.

When Optimize is set to All Periods, then the system will calculate the optimized price to bill the customer using this term and the related price.

If Optimize is set to Never, then this field is informational only.

Click on the field **Rental Terms Code Alt2**

The Rental Term Code Alt2 can be specified in the fields for a particular rental term. Once the field is populated for a rental term and that rental term is selected on the rental order line, then this term will automatically default to the rental order line.

When Optimize is set to All Periods, then the system will calculate the optimized price to bill the customer using this term and the related price.

If Optimize is set to Never, then this field is informational only.



ODT Rentals Online Help

Click on the field **Period Code**

Specifies the period code that is applicable to the rental term. This field is mandatory.

Click on the field **Invoicing Period Code**

Specifies the invoicing period code that is applicable to the rental term.

This field is automatically populated with the same Rental Period as selected in the Period Code field and can be overridden to specify a different Rental Period to be used for when the invoicing is to occur.

For example, for when the Period Code is setup with a Rental Period of Day, which defines the rental period length, however, your organization want to invoice the rental contract on a weekly basis, then the Rental Period of Week is to be selected in the Invoicing Period Code field.

Click on the field **Early Billing Date Formula**

This field is used to specify a date formula for the number of days in advance of the Billing Date that the invoice can be generated.

Click on the field **Rental Date Time Tracking**

Specifies whether rentals will be tracked using date only or date and time.

There are 2 options available for this field.

Track Date Only:

Specifies that rentals are based on dates on rent only. The time of the rental on the date the unit is rented out and the time the rental unit is returned is not relevant to the rental.

When the option Track Date Only is selected, then the Rental Start Time will default to 12:00:00 AM and the Rental Return Time will default to 11:59:59 PM. Thus the rental and return can be at any time during the day the rental commences and the rental ends.

Tracking Date and Time:

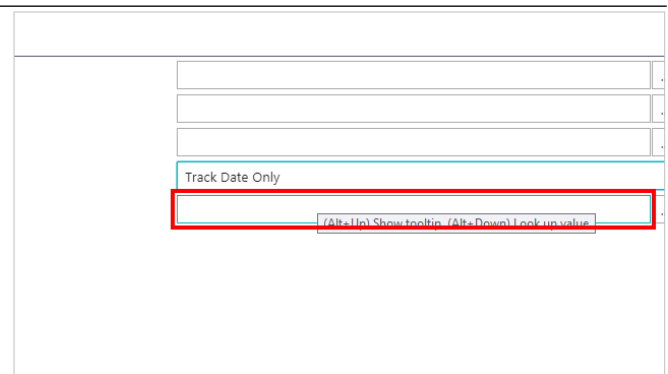
Specifies that time is a factor in renting and returning the rental units.

When the option Track Date and Time is selected, then the Rental Start Time will default to the time at which the quote or contract is created. The Rental Return Time will be calculated from the Rental Start Time based on the Period Code selected. The Rental Return Time is to be entered when the units are returned to ensure that the customer is billed up to the time the units are returned.

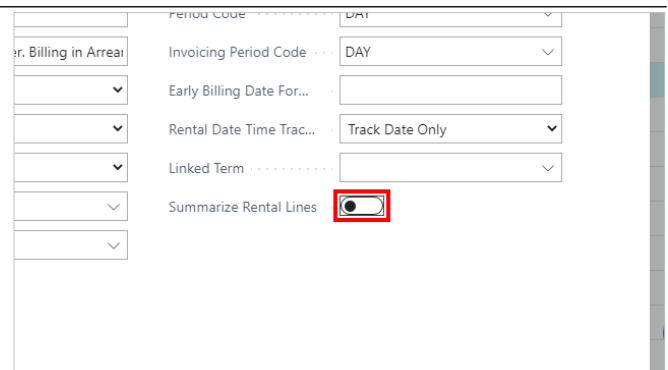
Click on the field **Linked Term**

Specifies a rental term code that pricing will automatically move to when the return date of the rental exceeds the period code specified on the rental term plus time.

This field is to be populated only when setting up Hybrid Hourly pricing schemas.



Click on the toggle field Summarize Rental Lines Specifies whether a term with a Period Code of Day, will have the Rental Amount Lines summarized for the date range on the Rental Line.



The ability to activate the Summarize Rental Lines 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.

NOTE:

There are 2 additional fields, Enforce End of Month Billing and Enforce First of Month Billing, which are only displayed when specific settings are configured.

These fields are used for the Billing Cycle Types feature, which can be reviewed in Processing Rentals, Rental Contracts Using Billing Cycle Types.

2.6.2. How to Set Up Rental Terms for Billing at the Start of a Contract

2.6.2.1. Overview

This rental term set up is to be used when the customer is to be invoiced for the entire length of the rental at the start of the rental contract.

With this invoicing strategy the rental will be based on the rental period and the invoicing period being the same.

This term is also based on tracking by date only. This means that time is not used in the pricing calculation for determining what the customer will be billed.



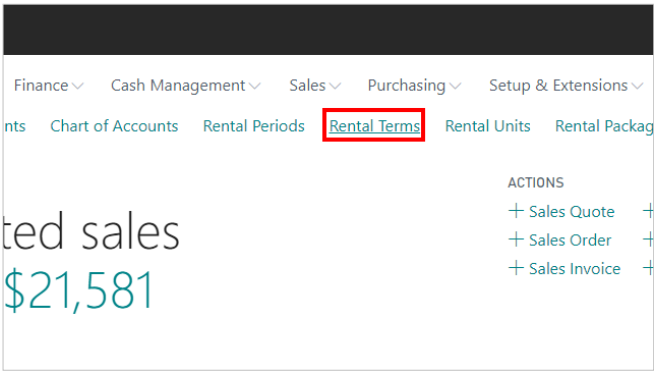
If the Rental Return Date entered on the Rental Line exceeds a single rental period, the customer will be invoiced for an additional full rental period or periods based on the actual return date entered.

2.6.2.2. Steps to Setup a Monthly Rental Term for Billing at the Start of a Rental Contract

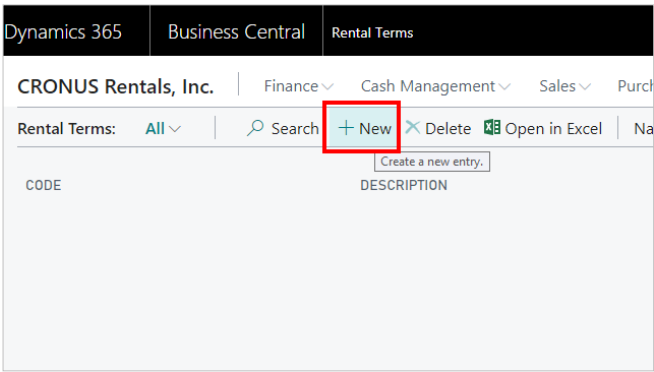
Profile - Business Manager

The example provided demonstrates the steps to setup a monthly rental term.

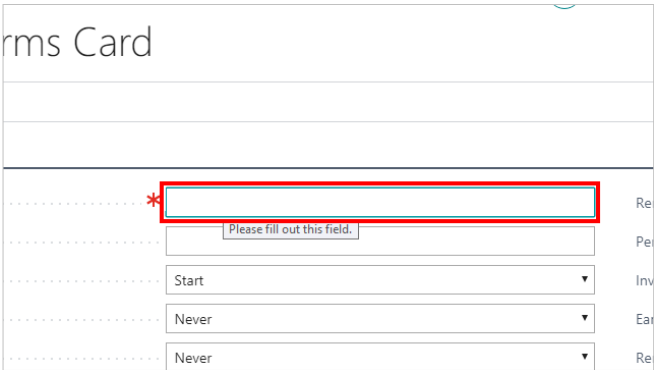
Click on the navigation menu item **Rental Terms**



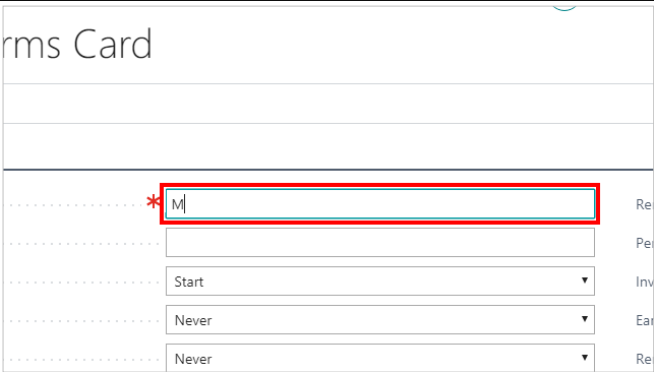
Click on the navigation menu item **New**



Click on the field **Code**, (Blank)



Enter the text **MONTH-START**.





ODT Rentals Online Help

Click on **Code = MONTH, Description = Month**

Invoicing Period Code	CODE	DESCRIPTION
Billing Date Formula	28D	28 Days
Bill Date Time Tracking	2HR	2 Hours
Bill Term	4HR	4 Hours
	8HR	8 Hours
	DAY	Day
	MONTH	Month
	+ New Select record "MONTH"	

Click on the field **Invoicing Period Code, (MONTH)**

Note that the Period Code selected automatically defaults to the Invoicing Period Code field.

Form showing dropdown menus for Invoicing Period Code and Rental Date Time Tracking. The Invoicing Period Code dropdown is highlighted with a red box and shows "MONTH" selected.

Click on the field **Rental Date Time Tracking**

The default setting is Track Date Only, which this term is for.

Form showing dropdown menus for Rental Date Time Tracking. The Rental Date Time Tracking dropdown is highlighted with a red box and shows "Track Date Only" selected.

Click on the back button

Form showing the Rental Terms Ca screen. The back button is highlighted with a red box.

2.6.3. How to Set Up Rental Terms for Billing at the End of a Contract

2.6.3.1. Overview

This rental term set up is to be used when the customer is to be invoiced for the entire length of the rental at the end of the rental contract.

With this invoicing strategy, the rental will be based on



the rental period and the invoicing period being the same.

This term is also based on tracking by date only. This means that time is not used in the pricing calculation for determining what the customer will be billed.

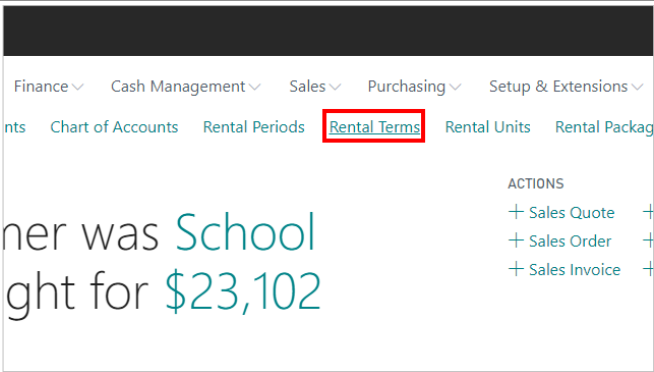
If the Rental Return Date entered on the Rental Line exceeds a single rental period, the customer will be invoiced for an additional full rental period or periods based on the actual return date entered.

The example provided in the steps is for a monthly rental term.

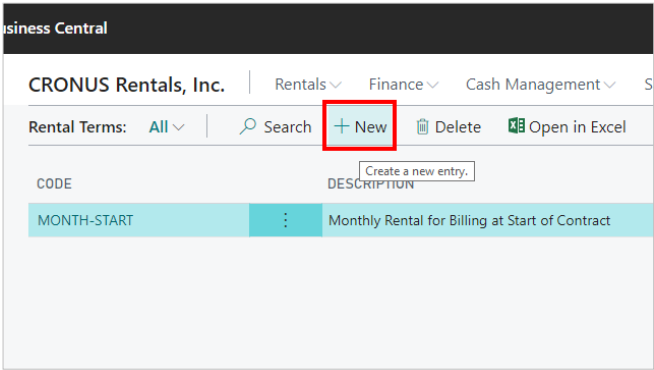
2.6.3.2. **How to Setup a Monthly Term for Billing at the End of a Rental Contract**

Profile - Business Manager

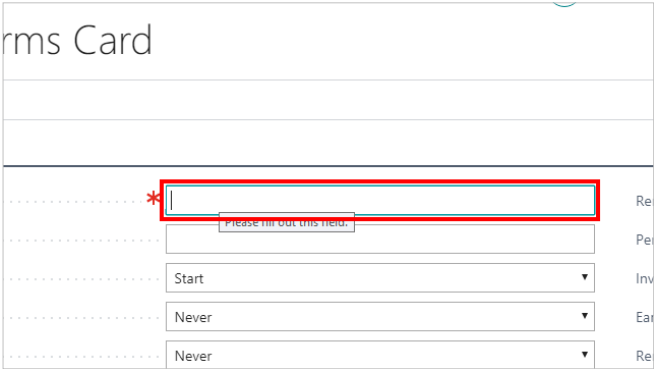
Click on the navigation menu item **Rental Terms**



Click on the link **New**



Click on the field **Code, (Blank)**





Enter the text **MONTH-END**.

Forms Card

.....	*	<input type="text" value="M"/>	Re
.....		<input type="text"/>	Pe
.....		Start	Inv
.....		Never	Ear
.....		Never	Re

Click on the field **Description, (Blank)**

Forms Card

.....	*	<input type="text" value="MONTH-END"/>	Re
.....		<input type="text"/>	Pe
.....		Start	Inv
.....		Never	Ear
.....		Never	Re
.....		<input type="text"/>	Lin

Enter the text **Monthly Rental for Billing at End of Contract**.

Forms Card

.....		<input type="text" value="MONTH-END"/>	Re
.....		<input type="text" value="M"/>	Pe
.....		Start	Inv
.....		Never	Ear
.....		Never	Re
.....		<input type="text"/>	Lin

Click on the field **Invoice Type**

Forms Card

.....		<input type="text" value="MONTH-END"/>	Re
.....		<input type="text" value="Monthly Rental for Billing at End of Contract"/>	Pe
.....		Start	Inv
.....		Never <input type="button" value="Start"/>	Ear
.....		Never	Re
.....		<input type="text"/>	Lin



ODT Rentals Online Help

Click on the item **End** in the list

MONTH-END

Monthly Rental for Billing at End of Contract

Start

Start

Periodic Start

Periodic End

End

End

Click on the field **Period Code, (Blank)**

Track Date Only

Click on **Code = MONTH, Description = Month**

	CODE	DESCRIPTION
Billing Date Formula	28D	28 Days
l Date Time Tracking	2HR	2 Hours
d Term	4HR	4 Hours
	8HR	8 Hours
	DAY	Day
	MONTH	Month
	+ New	

Click on the field **Invoicing Period Code, (MONTH)**

Note that the Period Code selected automatically defaults to the Invoicing Period Code field.

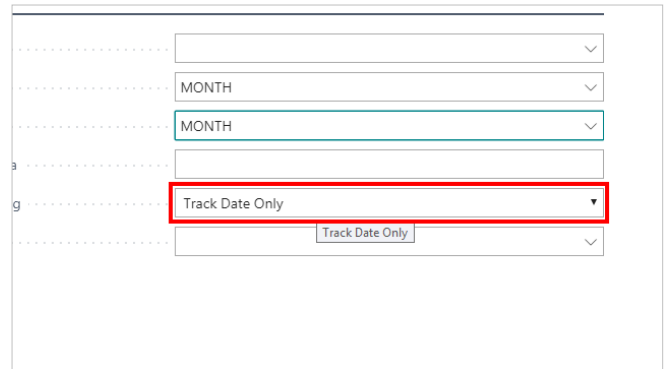
MONTH

MONTH

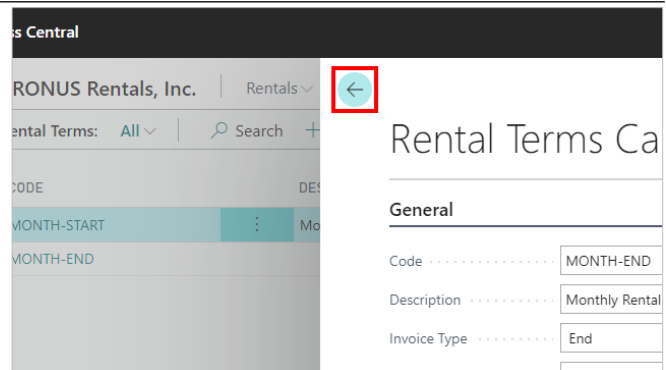
Track Date Only

Click on the field **Rental Date Time Tracking**

The default setting is Track Date Only, which this term is for.



Click on the back button



2.6.4. How to Set Up Rental Terms for Periodic Billing in Advance

2.6.4.1. Overview

This rental term set up is to be used when the customer is to be invoiced the rental charges at the beginning of each rental period.

With this invoicing strategy the rental will be based on the rental period and the invoicing period being the same.

This term is also based on tracking by date only. This means that time is not used in the pricing calculation for determining what the customer will be billed.

If the Rental Return Date entered on the Rental Line exceeds a single rental period, the customer will be invoiced for an additional full rental period based on the actual return date entered.

The example provided in the steps is for a monthly rental term for billing the customer at the beginning of each rental period.

2.6.4.2. Steps to Set Up a Monthly Rental Term for Periodic Billing in Advance

Profile - Business Manager



Click on the navigation menu item **Rental Terms**

FinanceCash ManagementSalesPurchasingSetup & Extensions

ntsChart of AccountsRental Periods**Rental Terms**Rental UnitsRental Packag

ner was School
ght for \$23,102

ACTIONS
+ Sales Quote
+ Sales Order
+ Sales Invoice

Click on the link **New**

business Central

CRONUS Rentals, Inc. | RentalsFinanceCash ManagementS

Rental Terms: AllSearch+ NewDeleteOpen in Excel

Create a new entry.

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-PEND	Monthly Rental - Per. Billing in Arrears
MONTH-START	Monthly Rental for Billing at Start of Contract

Click on the field **Code**

Card

* (Alt+Up) Show tooltip

Start

Never

Never

Enter the text **Month-PStart.**

Card

* M

Start

Never

Never



ODT Rentals Online Help

Click on the field **Description**

*** Month-PStart**

[Alt+Up] Show tooltip

Start

Never

Never

Enter the text **Monthly Rental - Per. Billing in Advance.**

Card

MONTH-START
M
Start
Never
Never

Click on the field **Invoice Type**

Card

MONTH-PSTART
Monthly Rental - Per. Billing in Advance
Start
Never Start
Never

Click on the item **Periodic Start** in the list

Card

MONTH-PSTART
Monthly Rental - Per. Billing in Advance
Start
Start
Periodic Start
Periodic Start
Periodic Start
End



Click on the lookup button **Period Code**

Look up value

Click on **Code = MONTH, Description = Month**

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
WEEK	Week

Click on the back button

Rental Terms Ca

General

Code MONTH-STAR

Description Monthly Rental

Invoice Type Periodic Start

2.6.5. How to Set Up Rental Terms for Periodic Billing in Arrears

2.6.5.1. Overview

This rental term set up is to be used when the customer is to be invoiced the rental charges at the end of each rental period.

With this invoicing strategy the rental will be based on the rental period and the invoicing period being the same.

This term is also based on tracking by date only. This means that time is not used in the pricing calculation for determining what the customer will be billed.

If the Rental Return Date entered on the Rental Line exceeds a single rental period, the customer will be invoiced for an additional full rental period based on the actual return date entered.

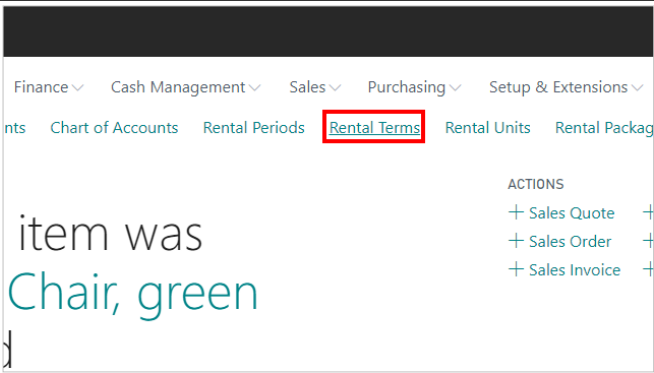


The example provided in the steps is for a monthly rental term for billing the customer at the end of each rental period and on return, if applicable.

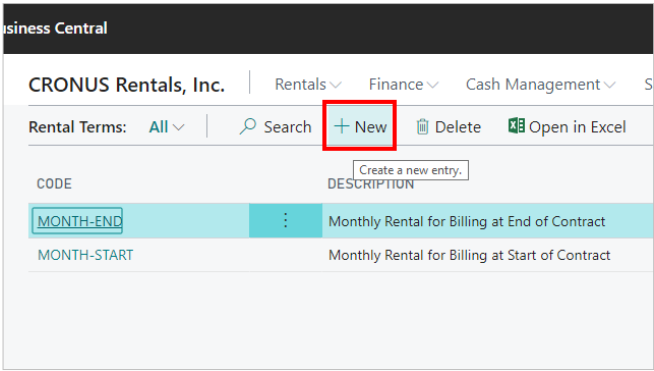
2.6.5.2. Steps to Set Up a Monthly Rental Term for Periodic Billing in Arrears

Profile - Business Manager

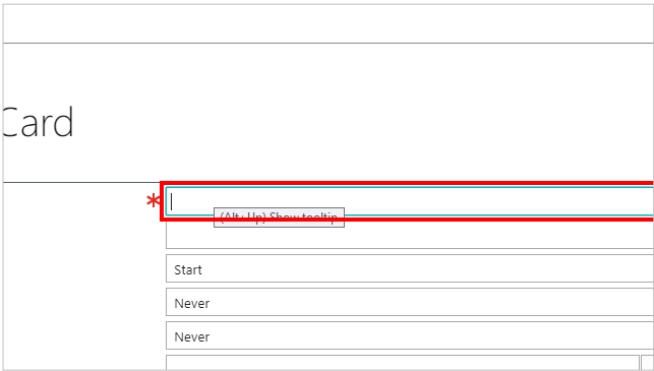
Click on the navigation menu item **Rental Terms**



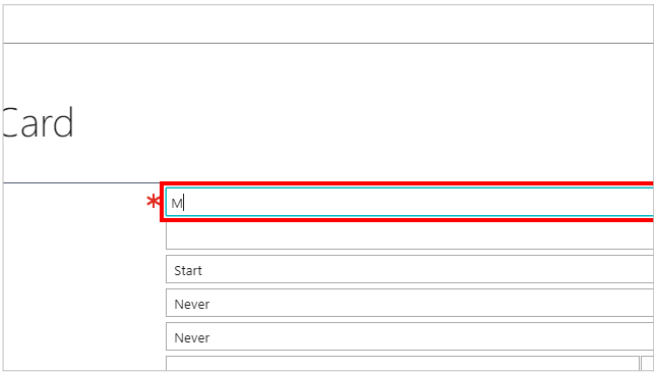
Click on the link **New**



Click on the field **Code**



Enter the text **MONTH-PEND.**





Click on the field **Description**

Card

MONTH-PEND

(Alt: 11) Check out date

Start

Never

Never

Enter the text **Monthly Rental - Per. Billing in Arrears**.

Card

MONTH-PEND

M

Start

Never

Never

Click on the field **Invoice Type**

Card

MONTH-PEND

Monthly Rental - Per. Billing in Arrears

Start

Never

Start

Never

Click on the item **Periodic End** in the list

Card

MONTH-PEND

Monthly Rental - Per. Billing in Arrears

Start

Start

Periodic Start

Periodic End

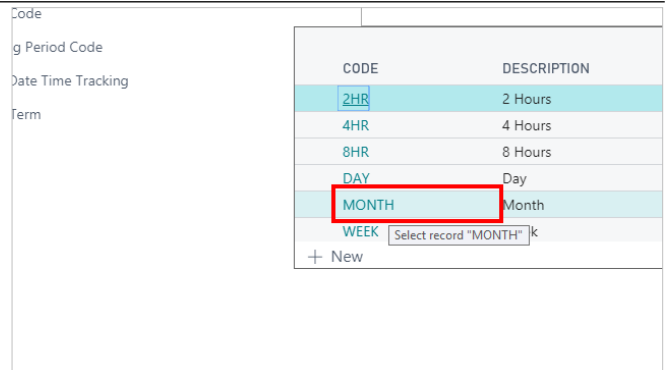
End

Periodic End

Click on the lookup button **Period Code**

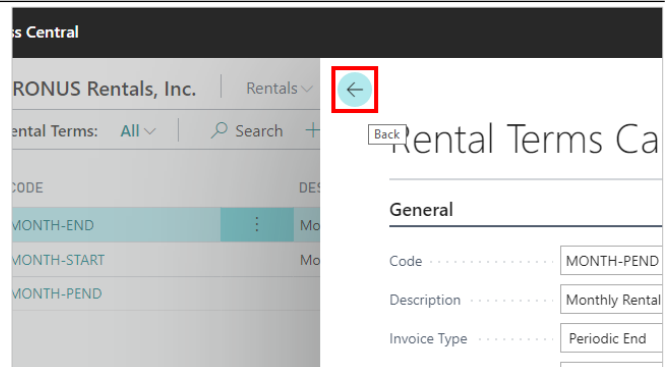


Click on **Code = MONTH, Description = Month**



CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
WEEK	Week

Click on the back button



2.6.6. How to Set Up Rental Terms for Optimization for Partial Periods

2.6.6.1. Overview

Optimization provides flexible pricing. The pricing calculation selects rental prices that total the lowest rental amount – a best price practice. This best price calculation is used when the rental length is either shorter or exceeds the rental period assigned to the rental term entered on the rental quote or contract.

For example, if the rental was for 1 month and 10 days, the pricing calculates the best price based on billing for 1 month, 1 week and 3 days.

The pricing first calculates the price based on billing for 1 month, 1 week and 3 days. This price is then compared to what a billing might be if, 2 months was billed, 6 weeks was billed or 40 (41 days if the month has 31 days) were billed and determines which is the lowest price. The lowest price will be the price which the customer will be billed.

This pricing calculation uses the Rental Term and the Alternative Rental Terms, which are either set up on the rental units in the rental prices or entered directly on the rental line.



Setup for optimization requires the setup of the optimized rental terms to be used in the calculation with the Optimize field set to All Periods.

When the rental terms are setup on the rental unit - rental prices, the rental terms and prices will default to the rental line of a quote or contract, when any one of the rental terms is entered on the rental line.

In the example above, the setup of rental prices on the rental unit would be for daily, weekly, and monthly rentals. Each of these rental terms would have the other terms assigned in the Rental Terms Code Alt1 and Rental Terms Code Alt2 fields.

There are two options available on the Optimize field:

- **Never:** No pricing flexibility will occur.
- **All Periods:** Enables you to optimize throughout the rental. This means the best price will be calculated based on the Rental Term and the Alternative Rental Term Codes and prices either on the rental unit – price cards or the rental line. The rental terms on the rental lines will take precedence over the rental prices on the rental unit.

The first step is to setup the optimized rental terms to be used in the calculation with the Optimize field set to All Periods.

The invoicing type selected when setting up the rental terms can be End, Start, Periodic Start or Periodic End. All of the optimized terms must have the same invoicing type and the same setting in the Rental Date Time Tracking field.

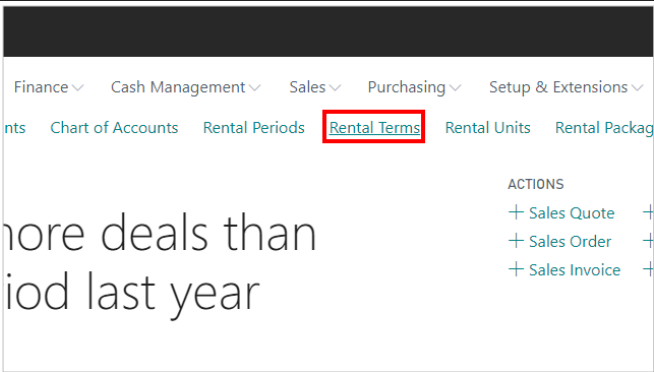
The second step is to add the rental terms to the Rental Terms Code Alt1 and Rental Terms Code Alt2 fields in the order in which you would want them displayed on the rental line.

The following steps are for the invoicing type of End, which means the billing will occur at the end of the rental contract. In addition the rental terms set up are based on tracking date only.

2.6.6.2. How to Setup a Monthly Term to Optimize Partial Periods

Profile - Business Manager

Click on the navigation menu item **Rental Terms**





Click on the link **New**

Business Central

CRONUS Rentals, Inc. | Rentals | Finance | Cash Management | S

Rental Terms: All | Search **+ New** Delete Open in Excel

Create a new entry.

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-PEND	Monthly Rental - Per. Billing in Arrears
MONTH-PSTART	Monthly Rental - Per. Billing in Advance.
MONTH-START	Monthly Rental for Billing at Start of Contract

Click on the field **Code**

Card

*

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **Month-End-Opt.**

Card

*

Start

Never

Never

Click on the field **Description**

Card

*

(Alt+Up) Show tooltip

Start

Never

Never



ODT Rentals Online Help

Enter the text **Monthly Rental for Optimized End Billing**.

Card

MONTH-END-OPT

M

Start

Never

Never

Click on the field **Invoice Type**

Card

MONTH-END-OPT

Monthly Rental for Optimized End Billing

Start

Never Start

Never

Click on the item **End** in the list

Card

MONTH-END-OPT

Monthly Rental for Optimized End Billing

Start

Start

Periodic Start

Periodic End

End

End

Click on the field **Optimize**

Card

MONTH-END-OPT

Monthly Rental for Optimized End Billing

End

Never

Never Never



ODT Rentals Online Help

Click on the item **All Periods** in the list

MONTH-END-OPT

Monthly Rental for Optimized End Billing

End

Never

Never

All Periods

All Periods

Click on the lookup button **Period Code**

×

...

...

...

Track Date Only

...

Click on **Code = MONTH, Description = Month**

Code

g Period Code

Date Time Tracking

Term

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
WEEK	Week

WEEK Select record "MONTH"

+ New

Click on the field **Invoicing Period Code**

The Invoicing Period Code defaulted from the Period Code as Month is the planned setting.

MONTH

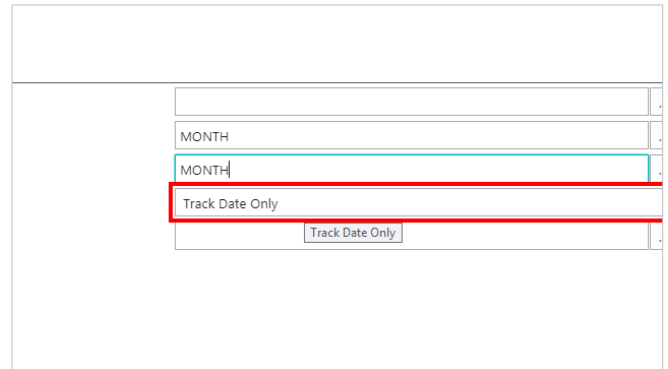
MONTH

MONTH, (Alt+Up) Show tooltip, (Alt+Down) Look up value

Track Date Only

Click on the field **Rental Date Time Tracking**

The default of Track Date Only is the planned setting for this example.



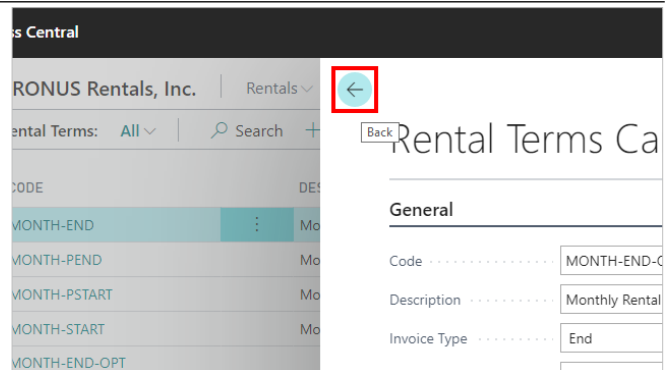
MONTH

MONTH

Track Date Only

Track Date Only

Click on the back button



Business Central

CRONUS Rentals, Inc. | Rentals

Rental Terms: All Search

CODE DESCRIPTION

MONTH-END Monthly Rental for Billing at End of Contract

MONTH-PEND Monthly Rental - Per. Billing in Arrears

MONTH-PSTART Monthly Rental - Per. Billing in Advance.

MONTH-START Monthly Rental for Billing at Start of Contract

MONTH-END-OPT Monthly Rental for Optimized End Billing

Back Rental Terms Card

General

Code MONTH-END-C

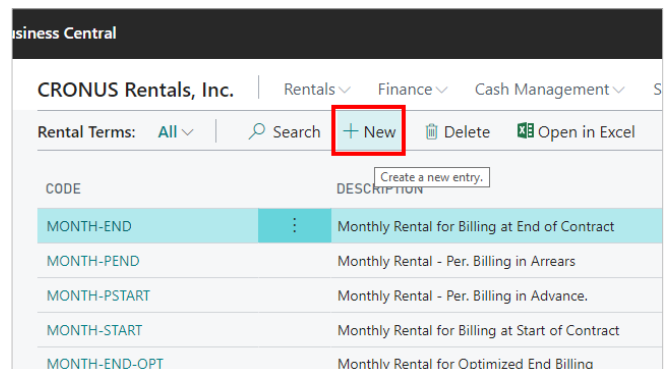
Description Monthly Rental

Invoice Type End

2.6.6.3.

How to Setup a Weekly Term to Optimize Partial Periods

Click on the link **New**



Business Central

CRONUS Rentals, Inc. | Rentals Finance Cash Management S

Rental Terms: All Search + New Delete Open in Excel

Create a new entry.

CODE DESCRIPTION

MONTH-END Monthly Rental for Billing at End of Contract

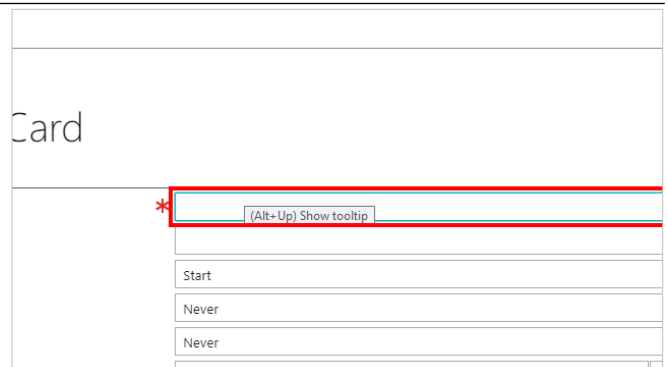
MONTH-PEND Monthly Rental - Per. Billing in Arrears

MONTH-PSTART Monthly Rental - Per. Billing in Advance.

MONTH-START Monthly Rental for Billing at Start of Contract

MONTH-END-OPT Monthly Rental for Optimized End Billing

Click on the field **Code**



Card

* (Alt+Up) Show tooltip

Start

Never

Never



ODT Rentals Online Help

Enter the text **Week-End-Opt.**

Card

*

W

Start

Never

Never

Click on the field **Description**

Card

*

Week-End-Opt

Start

Never

Never

Enter the text **Weekly Rental for Optimized End Billing.**

Card

WEEK-END-OPT

W

Start

Never

Never

Click on the field **Invoice Type**

Card

WEEK-END-OPT

Weekly Rental for Optimized End Billing

Start

Never

Never



ODT Rentals Online Help

Click on the item **End** in the list

Card

WEEK-END-OPT

Weekly Rental for Optimized End Billing

Start

Start

Periodic Start

Periodic End

End

End

Click on the field **Optimize**

Card

WEEK-END-OPT

Weekly Rental for Optimized End Billing

End

Never

Never

Never

Click on the item **All Periods** in the list

Card

WEEK-END-OPT

Weekly Rental for Optimized End Billing

End

Never

Never

All Periods

All Periods

Click on the lookup button **Period Code**

×

Look up value

Track Date Only



ODT Rentals Online Help

Click on **Code = WEEK, Description = Week**

g Period Code Date Time Tracking Term	CODE	DESCRIPTION
	2HR	2 Hours
	4HR	4 Hours
	8HR	8 Hours
	DAY	Day
	MONTH	Month
	WEEK	Week
	+ New	

Click on the field **Invoicing Period Code**

The Invoicing Period Code defaulted from the Period Code as Week is the planned setting.

WEEK

WEEK

Track Date Only

WEEK, (Alt+Up) Show tooltip, (Alt+Down) Look up value

Click on the field **Rental Date Time Tracking**

The default of Track Date Only is the planned setting for this example.

WEEK

WEEK

Track Date Only

Track Date Only

Click on the back button

Central

RONUS Rentals, Inc. | Rentals

←

Rental Terms Ca

General

Code WEEK-END-OP

Description Weekly Rental f

Invoice Type End



2.6.6.4. How to Setup a Daily Term to Optimize for Partial Periods

Click on the link **New**

Business Central

CRONUS Rentals, Inc. | Rentals | Finance | Cash Management | S

Rental Terms: All | Search | **+ New** | Delete | Open in Excel

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-PEND	Monthly Rental - Per. Billing in Arrears
MONTH-PSTART	Monthly Rental - Per. Billing in Advance.
MONTH-START	Monthly Rental for Billing at Start of Contract
MONTH-END-OPT	Monthly Rental for Optimized End Billing

Click on the field **Code**

Card

*

Start

Never

Never

Enter the text **Day-End-Opt.**

Card

*

Start

Never

Never

Click on the field **Description**

Card

*

Start

Never

Never



ODT Rentals Online Help

Enter the text **Daily Rental for Optimized End Billing**.

Card

DAY-END-OPT

Start

Never

Never

Click on the field **Invoice Type**

Card

DAY-END-OPT

Daily Rental for Optimized End Billing

Start

Never

Never

Click on the item **End** in the list

Card

DAY-END-OPT

Daily Rental for Optimized End Billing

Start

Start

Periodic Start

Periodic End

End

End

Click on the field **Optimize**

Card

DAY-END-OPT

Daily Rental for Optimized End Billing

End

Never

Never

Never



ODT Rentals Online Help

Click on the item **All Periods** in the list

DAY-END-OPT

Daily Rental for Optimized End Billing

End

Never

Never

All Periods

All Periods

Click on the lookup button **Period Code**

...

...

Look up value

Track Date Only

...

Click on **Code = DAY, Description = Day**

...

...

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
M	Month
WEEK	Week

+ New

Click on the field **Invoicing Period Code**

The Invoicing Period Code defaulted from the Period Code as Day is the planned setting.

DAY

DAY

DAY, (Alt+Up) show tooltip, (Alt+Down) Look up value

Track Date Only



Click on the field **Rental Date Time Tracking**

The default of Track Date Only is the planned setting for this example.

A screenshot of a dropdown menu for 'Rental Date Time Tracking'. The menu is open, showing several options. The option 'Track Date Only' is highlighted with a red rectangular box. Below it, there is a button labeled 'Track Date Only'.

Click on the back button

A screenshot of the 'Rental Terms' page in the system. A blue back arrow button is highlighted with a red rectangular box in the top right corner of the page header area.

2.6.6.5. How to Setup Alternative Terms on Optimized Rental Terms

Click on the link in cell **Code** with the value **DAY-END-OPT**

A screenshot of a table listing rental terms. The table has two columns: 'CODE' and 'DESCRIPTION'. The row for 'DAY-END-OPT' is highlighted with a red rectangular box. Below the table, there is a button labeled 'Open record "DAY-END-OPT" in a new window'.

Click on the lookup button **Rental Terms Code Alt1**


A screenshot of a form for looking up rental terms. The form has several fields: 'Rental Terms Code Alt2', 'Period Code', 'Invoicing Period Code', 'Rental Date Time Tracking', and 'Linked Term'. A red rectangular box highlights a button labeled 'Look up value' at the bottom right of the form.

Click on **Code = WEEK-END-OPT**, **Description = Weekly Rental for Optimized End Billing**

CODE	DESCRIPTION
MONTH-END PRORATE	Monthly Rental for Prorat
MONTH-END-OPT	Monthly Rental for Optim
MONTH-PEND	Monthly Rental - Per. Billi
MONTH-PSSTART	Monthly Rental - Per. Billi
MONTH-START	Monthly Rental for Billing
WEEK-END-OPT	Weekly Rental for Optimiz

+ New

Click on the field **Rental Terms Code Alt2, (Blank)**



Click on the link in cell **Code** with the value **MONTH-END-OPT**

CODE	DESCRIPTION
DAY-START	Daily Rental - Per. Billing in
DAY-START	Daily Rental for Billing at Sta
DAY-WEEK-PEND	Daily Rental - Per. End Billing
MONTH-END	Monthly Rental for Billing at
MONTH-END-OPT	Monthly Rental for Optimiz

+ New Select record "MONTH-END-OPT"

Click on the back button

The screenshot shows the 'Rental Management' interface. On the left, there's a table of rental terms. The 'DAY-END-OPT' term is selected, and its details are shown on the right. A red box highlights the 'Back' button in the top right corner of the detailed view.

CODE	DESCRIPTION
MONTH-END	Month End
MONTH-PEND	Month Pending
MONTH-PSTART	Month Pending Start
MONTH-START	Month Start
MONTH-END-OPT	Month End Option

DAY-END-OPT

General

Code DAY-END-OPT

Description Daily Rental for

Invoice Type End



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEEK-END-OPT**

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contra
MONTH-END PRORATE	Monthly Rental for Prorated End Billing
MONTH-START	Monthly Rental for Billing at Start of Contra
MONTH-END-OPT	Monthly Rental for Optimized End Billing
WEEK-END-OPT	Weekly Rental for Optimized End Billing
DAY-END-OPT	Daily Rental for Optimized End Billing

Click on the lookup button **Rental Terms Code Alt1**

ized End Billing

Rental Terms Code Alt2

Period Code

Invoicing Period Code

Rental Date Time Tracking

Linked Term

Look up value

Click on **Code = DAY-END-OPT**, **Description = Daily Rental for Optimized End Billing**

Alt1

End

All Periods

Never

CODE	DESCRIPTION
DAY-END-OPT	Daily Rental for Optimized End Billing
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-END PRORATE	Monthly Rental for Prorated End Billing
MONTH-END-OPT	Monthly Rental for Optimized End Billing
MONTH-PEND	Monthly Rental - Per. Billing
MONTH-START	Monthly Rental - Per. Billing

+ New

Click on the lookup button **Rental Terms Code Alt2**

WEEK

WEEK

Track Date Only

Look up value



Click on **Code = MONTH-END-OPT**, Description = **Monthly Rental for Optimized End Billing**

Terms Code Alt2	
Code	
g Period Code	
Date Time Tracking	
Term	

CODE	DESCRIPTION
DAY-END-OPT	Daily Rental for Optimized End Billing
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-END PRORATE	Monthly Rental for Prorated End Billing
MONTH-END-OPT	Monthly Rental for Optimized End Billing
MONTH-START	Monthly Rental for Billing at Start of Contract
MONTH-PSTART	Monthly Rental - Per. Billing
MONTH-PESTART	Monthly Rental - Per. Billing

+ New

Click on the back button

Central

RONUS Rentals, Inc. | Rentals

...L TERMS CARD | WORK DATE: 4/8/2019

WEEK-END-OPT

General

Code WEEK-END-OPT

Description Weekly Rental for Optimized End Billing

Invoice Type End

Click on the link in cell **Code** with the value **MONTH-END-OPT**

Rental Terms: All | Search | New | Delete | Open in Excel

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-END PRORATE	Monthly Rental for Prorated End Billing
MONTH-START	Monthly Rental for Billing at Start of Contract
MONTH-END-OPT	Monthly Rental for Optimized End Billing
WEEK-END-OPT	Weekly Rental for Optimized End Billing
DAY-END-OPT	Daily Rental for Optimized End Billing

Click on the lookup button **Rental Terms Code Alt1**

Rental Terms Code Alt2	
Period Code	
Invoicing Period Code	
Rental Date Time Tracking	
Linked Term	

Look up value



Click on **Code = DAY-END-OPT**, **Description = Daily Rental for Optimized End Billing**

CODE	DESCRIPTION
DAY-END-OPT	Daily Rental for Optimized End Billing
MONTH-END	Monthly Rental for Prorate
MONTH-END PRORATE	Monthly Rental for Prorate
MONTH-END OPT	Monthly Rental for Optimized End Billing
MONTH-PEND	Monthly Rental - Per. Billing
MONTH-PSTART	Monthly Rental - Per. Billing

Click on the lookup button **Rental Terms Code Alt2**

Look up value

Click on **Code = WEEK-END-OPT**, **Description = Weekly Rental for Optimized End Billing**

CODE	DESCRIPTION
MONTH-END PRORATE	Monthly Rental for Prorate
MONTH-END OPT	Monthly Rental for Optimized End Billing
MONTH-PEND	Monthly Rental - Per. Billing
MONTH-PSTART	Monthly Rental - Per. Billing
MONTH-START	Monthly Rental for Billing
WEEK-END-OPT	Weekly Rental for Optimized End Billing

Click on the back button

MONTH-END-C

General

Code MONTH-END-C

Description Monthly Rental

Invoice Type End

2.6.7. How to Set Up Terms for Proration for Partial Periods

2.6.7.1. Overview

When used, the customer receives a reduced price rate, if they opts for a longer or shorter rental duration that the period assigned to the rental term.

The Prorate field is a conditional application.

The bullets below explain your options available on this field:



- **Never:** This value prevents any prorating from occurring. For example, if a customer rents a unit for 2-weeks but returns it after 8-days, the customer is still charged for 2 weeks
- **All Periods:** This enables you to prorate at any time during the rental. For example, if a customer rents a unit for 2-weeks, but returns it after 8-days. The customer will be charged for 1 week plus one seventh of a week, instead of one week plus one day, which would likely be more expensive.

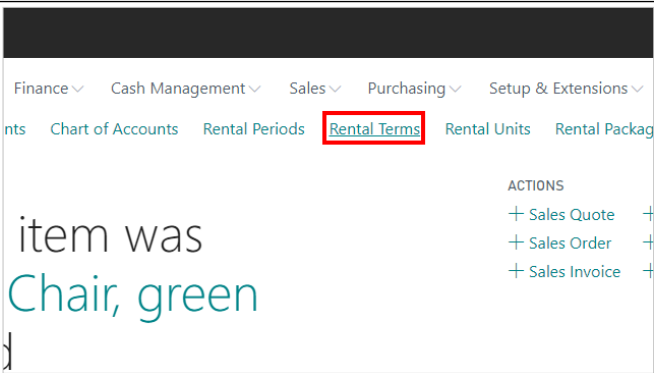
The Prorate option can be used with any of the four Invoicing Types of End, Start, Periodic End or Periodic Start.

The example provided next is for a monthly rental term, where invoicing is a single invoice at the end of the contract.

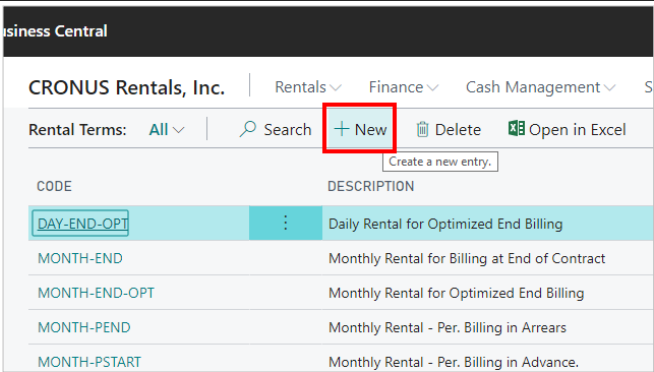
2.6.7.2. How to Set Up a Monthly Term to Prorate Partial Periods

Profile - Business Manager

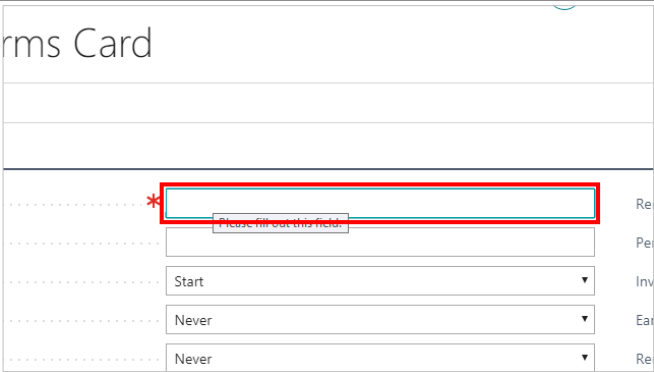
Click on the navigation menu item **Rental Terms**



Click on the link **New**



Click on the field **Code, (Blank)**



ODT Rentals Online Help

Enter the text **Month-End Prorate**.

ms Card

* M

Start

Never

Never

Click on the field **Description, (Blank)**

* Month-End Prorate

 Start
 Never
 Never

Enter the text **Monthly Rental for Prorated End Billing.**

MIS Card	
MONTH-END PRORATE	Re
M	Pe
Start	Inv
Never	Ear
Never	Re
	Li

Click on the field **Invoice Type**

.....	MONTH-START	Re
.....	Monthly Rental for Billing at Start of Contract	Pe
.....	Start	Inv
.....	Never	Ear
.....	Never	Re
.....		Lin

ODT Rentals Online Help

Click on the item **End** in the list

MONTH-END PRORATE

Monthly Rental for Prorated End Billing

Start

Start
Periodic Start
Periodic End
End

End


Click on the field **Prorate**

MONTH-END PRORATE	Re
Monthly Rental for Prorated End Billing	Pe
End	Inv
Never	Ear
Never	Re
Never	Lin

Click on the item **All Periods** in the list

MONTH-END PRORATE	Re
Monthly Rental for Prorated End Billing	Pe
End	Inv
Never	Ear
Never	Re
Never	Lin
All Periods	

Click on the field **Period Code, (Blank)**



The screenshot shows the 'New Item' dialog box with the 'New' button highlighted by a red rectangle. The button is located at the bottom right of the dialog box, next to the 'Cancel' button. The 'New' button has a green checkmark icon and the text 'New'.



Click on **Code = MONTH, Description = Month**

Invoicing Period Code	CODE	DESCRIPTION
Billing Date Formula	28D	28 Days
Bill Date Time Tracking	2HR	2 Hours
Bill Term	4HR	4 Hours
	8HR	8 Hours
	DAY	Day
	MONTH	Month
	+ New	

Click on the field **Invoicing Period Code, (MONTH)**

Note that the Period Code selected automatically defaults to the Invoicing Period Code field.

Click on the field **Rental Date Time Tracking**

The default setting is Track Date Only, which this term is for.

Click on the back button

2.6.8. How to Set Up Rental Terms for Hybrid Hourly End Billing

2.6.8.1. Overview

This invoicing strategy provides the capability to link rental terms to another term, enabling a cascading of terms until a Rental Term is reached that the contract duration falls within, or reaches a rental term that does not have a linked Rental Term specified.

For example, a company could offer 2 hour, 4 hour, and 8 hour fixed rentals as well as the normal



day/week/month optimized rental terms.

If the customer took out the unit for 2 hours and returned it after 3 hours, the rental will automatically move up to a 4 hour rental term and price. The same for the relationship between 4 hours and 8 hours.

If the equipment was out for more than 8 hours, the rental will flip to a day rental with the ability to be combined with a related weekly and monthly optimized terms.

When this last action was determined to be applicable, the rental amount lines gets recalculated and the rental invoicing proceeds as it currently does in the system for optimized rental terms.

2.6.8.2. Required Setups for Hybrid Hourly Billing

Rental Periods:

Rental Periods for the hourly rentals of 2, 4 and 8 hours using the Period Duration.

For information on setting up rental terms based on Period Duration, please see, How to Set Up Rental Periods Based on Period Duration.

Rental Terms:

- 2 HR END: This rental term is for a 2 hour rental with billing at the end of the contract.
- 4 HR END: This rental term is for a 4 hour rental with billing at the end of the contract.
- 8 HR END: This rental term is for an 8 hour rental with billing at the end of the contract.
- DAY-END-OPT-TIME: This rental term is for use when the rental exceeds 8 hours, and will be a part of the optimization price calculation. This term is based on Tracking Date and Time.
- WEEK-END-OPT-TIME: This rental term is for use in the optimization calculation, and is based on Tracking Date and Time.
- MONTH-END-OPT-TIME: This rental term is for use in the optimization calculation, and is based on Tracking Date and Time.

2.6.8.3. How to Set Up Hybrid Hourly Rental Terms

The first step is to setup the hourly rental terms and optimized rental terms with the field, Rental Date-Time Tracking, set to Track Date and Time.

The second step is to add the linked rental terms on the hourly rental terms to enable the automatic movement to the next rental term when the rental duration is exceeded on the rental term.

The following steps covers only the setup of the Hourly Rental Terms for 2 hours, 4 hours and 8 hours.

The setup of the optimized rental terms will not be covered here. The optimized rental terms need to be setup prior to setting up the hourly rental terms.

For an example on how to setup the optimized rental terms, please review the help document called, How to Set Up Rental Terms for Optimization for Partial Periods.

The one difference when setting up optimized rental terms for Hybrid Hourly is that the Rental Date Time Tracking field must be set to Track Date and Time. This is mandatory for Hybrid Hourly linking.

Profile - Business Manager



ODT Rentals Online Help

Click on the navigation menu item **Rental Terms**

FinanceCash ManagementSalesPurchasingSetup & Extensions

ntsChart of AccountsRental Periods**Rental Terms**Rental UnitsRental Packag

ner was School
ght for \$23,102

ACTIONS
+ Sales Quote
+ Sales Order
+ Sales Invoice

Click on the link **New**

business Central

CRONUS Rentals, Inc. | RentalsFinanceCash ManagementS

Rental Terms: AllSearch+ NewDeleteOpen in Excel

Create a new entry.

CODE	DESCRIPTION
DAY-END-OPT	Daily Rental for Optimized End Billing
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-END-OPT	Monthly Rental for Optimized End Billing
MONTH-END-PRORATE	Monthly Rental for Prorated End Billing
MONTH-PEND	Monthly Rental - Per. Billing in Arrears

Click on the field **Code**

Card

* 2 hr (Alt+Up) Show tooltip

Start

Never

Never

Enter the text **2 HR**.

Card

* 2

Start

Never

Never



Click on the field **Description**

Card

*

2 HR

Start

Never

Never

Enter the text **2 Hour Rental - End Billing**.

Card

2 HR

2

Start

Never

Never

Click on the field **Invoice Type**

Card

2 HR

2 Hour Rental - End Billing

Start

Never

Never

Click on the item **End** in the list

Card

2 HR

2 Hour Rental - End Billing

Start

Start

Periodic Start

Periodic End

End

End



Click on the action **New**

al Terms Card

Create a new entry.

2 HR	Rental Terms Code Alt2
2 Hour Rental - End Billing	Period Code 2HR
End	Invoicing Period Code

Click on the field **Code**

Card

*

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **4 hr.**

Card

*

4

(Alt+Up) Show tooltip

Start

Never

Never

Click on the field **Description**

Card

*

4 hr

(Alt+Up) Show tooltip

Start

Never

Never



ODT Rentals Online Help

Enter the text **4 Hour Rental - End Billing**.

Card

4 HR

4

Start

Never

Never

Click on the field **Invoice Type**

Card

4 HR

4 Hour Rental - End Billing

Start

Never Start

Never

Click on the item **End** in the list

Card

4 HR

4 Hour Rental - End Billing

Start

Start

Periodic Start

Periodic End

End

End

Click on the lookup button **Period Code**

×

Look up value

Track Date Only



ODT Rentals Online Help

Click on **Code = 4HR, Description = 4 Hours**

Terms Code Alt2

Code

g Period Code

Date Time Tracking

Term

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
WEEK	Week
+ New	

Click on the action **New**

al Terms Card

4 HR

Rental Terms Code Alt2

4 Hour Rental - End Billing

Period Code

End

Invoicing Period Code

4HR

Click on the field **Code**

Card

*

[Alt+Up] Show tooltip

Start

Never

Never

Enter the text **8 hr.**

Card

*

8

Start

Never

Never



Click on the field **Description**

Card

* 8 hr

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **8 Hour Rental - End Billing**.

Card

8 HR

8

Start

Never

Never

Click on the field **Invoice Type**

Card

8 HR

8 Hour Rental - End Billing

Start

Never

Never

Click on the item **End** in the list

Card

8 HR

8 Hour Rental - End Billing

Start


Start

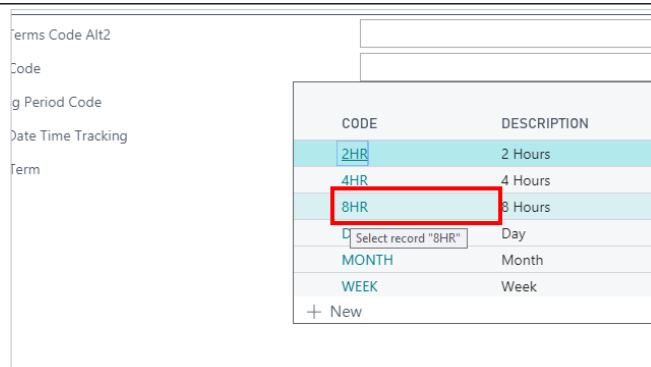
Periodic Start

Periodic End

End

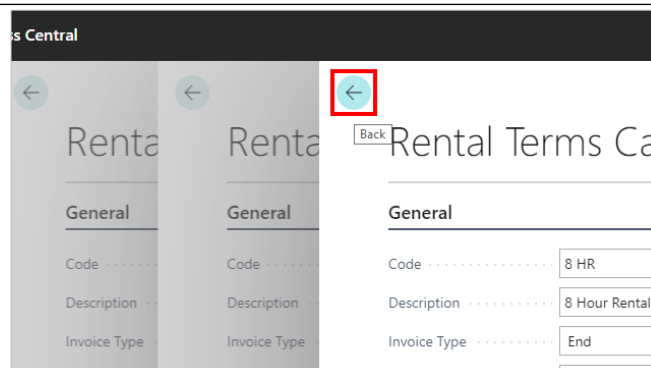
End

Click on the lookup button **Period Code**


Click on **Code = 8HR, Description = 8 Hours**


CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
Select record "8HR"	Day
MONTH	Month
WEEK	Week
+ New	

Click on the back button



2.6.8.4. How to Link Hybrid Hourly Rental Terms

The following demonstrates the linking of the rental terms, which enables the cascading of rental terms. The steps commence from the Rental Period list.

Click on the link in cell **Code** with the value **2 HR**

MONTH-END-PRORATE	Monthly Rental for Prorated E
MONTH-PEND	Monthly Rental - Per. Billing ir
MONTH-PSTART	Monthly Rental - Per. Billing ir
MONTH-START	Monthly Rental for Billing at S
WEEK-END-OPT	Weekly Rental for Optimized E
2 HR	2 Hour Rental - End Billing
4 H	4 Hour Rental - End Billing
8 HR	8 Hour Rental - End Billing



Click on the lookup button **Linked Term**

Click on **Code = 4 HR, Description = 4 Hour Rental - End Billing**

Click on the back button

Click on the link in cell **Code** with the value **4 HR**



Click on the lookup button **Linked Term**

4HR

Track Date and Time

Look up value

Click on **Code = 8 HR, Description = 8 Hour Rental - End Billing**

Date Time Tracking

Track Date and Time

Term

CODE	DESCRIPTION
2 HR	2 Hour Rental - End Billing
4 HR	4 Hour Rental - End Billing
8 HR	8 Hour Rental - End Billing
Select record "8 HR"	Daily Rental for Optimized
DAY-END-OPT-TIME	Daily Rental for Optimized
MONTH-END	Monthly Rental for Billing
+ New	

Click on the back button

Central

RONUS Rentals, Inc. | Rentals

Back

4 HR

General

Code

4 HR

Description

4 Hour Rental -

Invoice Type

End

Click on the link in cell **Code** with the value **8 HR**

MONTH-PSTART	Monthly Rental - Per. Billing in
MONTH-START	Monthly Rental for Billing at S
WEEK-END-OPT	Weekly Rental for Optimized E
2 HR	2 Hour Rental - End Billing
4 HR	4 Hour Rental - End Billing
8 HR	8 Hour Rental - End Billing
Open record "8 HR" in a new window	



Click on the lookup button **Linked Term**

Click on **Code = DAY-END-OPT-TIME, Description = Daily Rental for Optimized End Billing - Time**

Click on the back button

2.6.9. How to Set Up Rental Terms with a Different Invoicing Period

2.6.9.1. Overview

Rentals provides the ability to invoice rentals on a different period basis from the rental pricing period.

For example, for when the Period Code on the Rental Term is configured with a Rental Period of Day, which defines the rental period length and is how the pricing will be charged to the customer.

However, your organization wants to invoice the rental contract on a weekly basis.

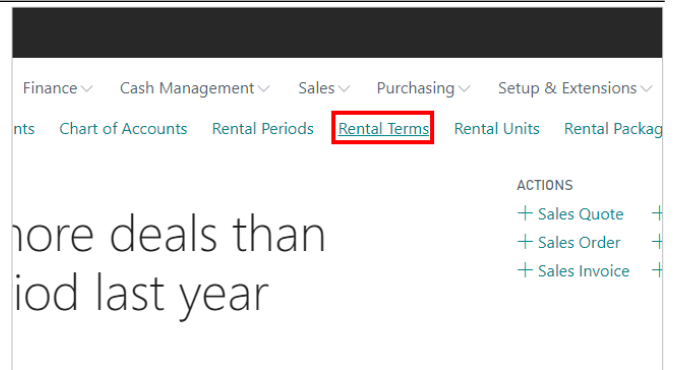
To accomplish this, the Invoicing Period Code field must have the Rental Period of Week selected on the Rental Term card.

2.6.9.2. Steps to Set Up a Daily Rental Term for Periodic Billing

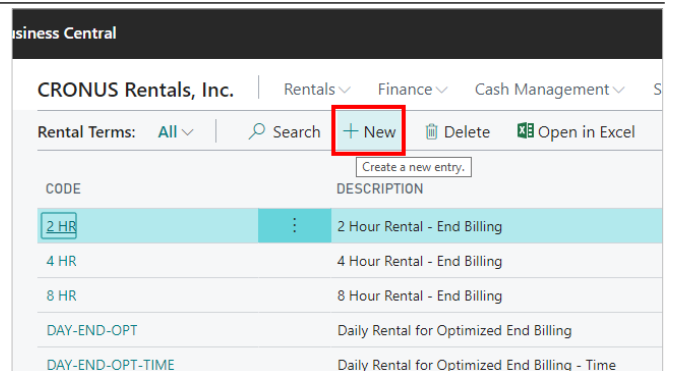
Weekly

The following demonstrates the setup required for the example noted in the Overview chapter.

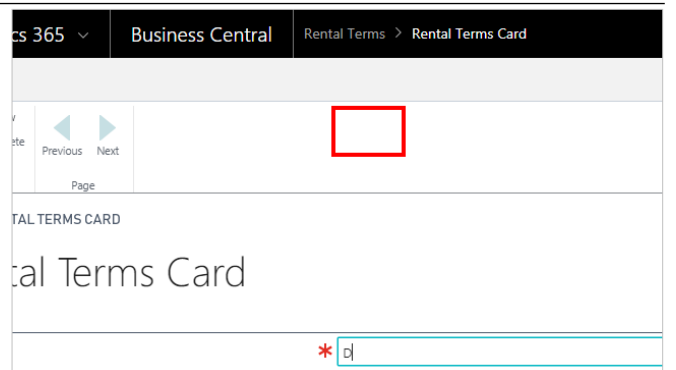
Click on the navigation menu item **Rental Terms**



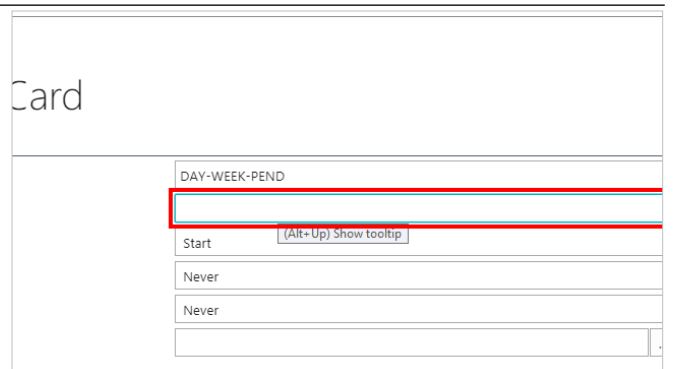
Click on the link **New**



Enter the text **Day-Week-PEND**.



Click on the field **Description**





ODT Rentals Online Help

Enter the text **Daily Rental - Per. End Billing Weekly**
Weekly.

Card

DAY-WEEK-PEND

D

Start

Never

Never

Click on the field **Invoice Type**

Card

DAY-WEEK-PEND

Daily Rental - Per. End Billing Weekly

Start

Never

Start

Never

Click on the item **Periodic End** in the list

Card

DAY-WEEK-PEND

Daily Rental - Per. End Billing Weekly

Start

Start

Periodic Start

Periodic End

End

Periodic End

Click on the lookup button **Period Code**

×

Look up value

Track Date Only



ODT Rentals Online Help

Click on **Code = DAY, Description = Day**

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
WEEK	Week

Click on the lookup button **Invoicing Period Code**

CODE	DESCRIPTION
DAY	Day
DAY	Day

Click on **Code = WEEK, Description = Week**

CODE	DESCRIPTION
DAY	Day
MONTH	Month
WEEK	Week

Click on the back button

Back

2.6.10. How to Set Up Rental Terms for Early Billing

2.6.10.1. Overview

ODT Rentals provides the ability to configure rental terms with an early billing date formula, which enables the ability to create invoices early, from both the Rental Contract and from the Rental Invoicing Worksheet.



On the Rental Term card the field, Early Billing Date Formula, is used to specify the number of days prior to the Billing Date that the invoice is to be available to be generated.

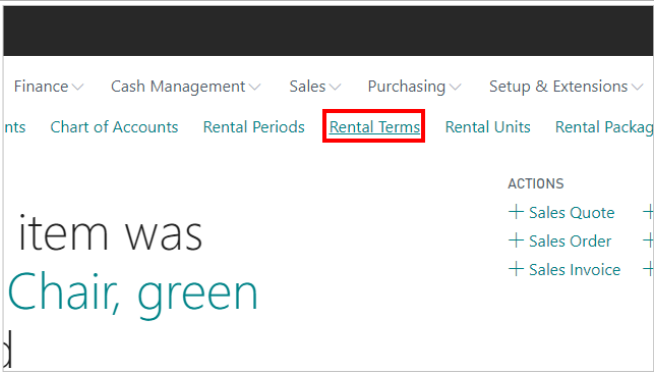
For example, if the invoice is to be able to be generated 5 days prior to the Billing Date in the Rental Amount Lines, then enter 5D in the Early Billing Date Formula field on the rental term card.

2.6.10.2. How to Set Up a Rental Term for Early Billing

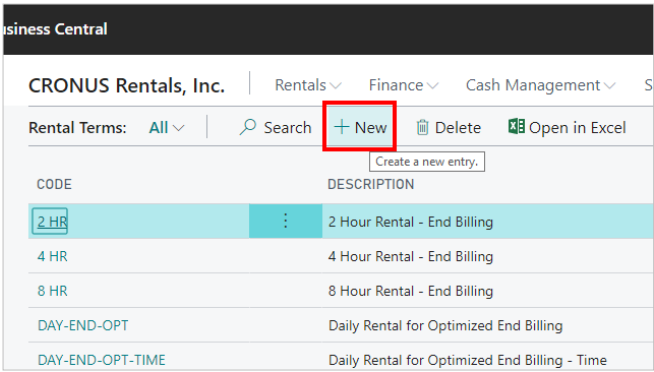
The following example demonstrates the setup of a periodic end monthly rental term, with the Early Billing Date Formula set to 5D so the invoices can be generated 5 days early.

The rental term will be based on Tracking Date Only.

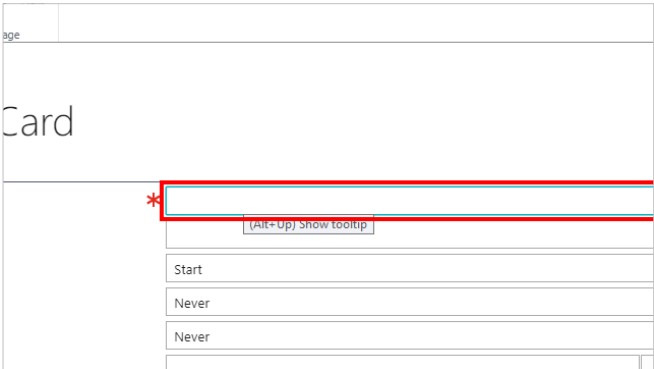
Click on the navigation menu item **Rental Terms**



Click on the link **New**



Click on the field **Code**





Enter the text **Month-pend early**.

age

Card

*

M

Start

Never

Never

Click on the field **Description**

Card

*

Month-pend early

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **Monthly Rental - Early Per. Billing in Arrears**.

Card

MONTH-PEND EARLY

M

Start

Never

Never

Click on the field **Invoice Type**

Card

MONTH-PEND EARLY

Monthly Rental - Early Per. Billing in Arrears

Start

Never

Start

Never



ODT Rentals Online Help

Click on the item **Periodic End** in the list

Card

MONTH-PEND EARLY

Monthly Rental - Early Per. Billing in Arrears

Start

Start

Periodic Start

Periodic End

End

Periodic End

Click on the lookup button **Period Code**

×

Track Date Only

Look up value

Click on **Code = MONTH, Description = Month**

Code

g Period Code

ling Date Formula

Date Time Tracking

Term

CODE	DESCRIPTION
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month
W	Select record "MONTH" Week
+ New	

Click on the field **Early Billing Date Formula**

MONTH

MONTH

Track Date Only



Enter the text **5D**.

A screenshot of a web form. It has several input fields. The third field from the top is highlighted with a red border and contains the text '5D'. Below it is a label 'Track Date Only' and another input field.

Click on the back button

A screenshot of a software interface. On the left is a table with columns 'CODE' and 'DESCRIPTION'. It lists rental terms: '2 HR', '4 HR', '8 HR', 'DAY-END-OPT', and 'DAY-END-OPT-TIME'. On the right is a form titled 'MONTH-PEND'. A red box highlights a blue back arrow button in the top left of the form. The form has fields for 'Code' (MONTH-PEND), 'Description' (Monthly Rental), and 'Invoice Type' (Periodic End).

The following example demonstrates the setup of a periodic start monthly rental term, with the Early Billing Date Formula set to 5D so the invoices can be generated 5 days early.

The rental term will be based on Tracking Date Only.

IMPORTANT

With Rental Term having an invoicing type of Start or Periodic Start, the Posting Date either on the contract or Rental Invoicing Worksheet must be equal to, or earlier than the posted shipment date for the posting of the first invoice.

Click on the link **New**

A screenshot of a software interface. At the top is a navigation bar with 'CRONUS Rentals, Inc.' and tabs for 'Rentals', 'Finance', and 'Cash Management'. Below is a table with columns 'CODE' and 'DESCRIPTION'. It lists rental terms: '2 HR', '4 HR', '8 HR', 'DAY-END-OPT', and 'DAY-END-OPT-TIME'. A red box highlights a '+ New' button in the top right of the table area. Below the table is a 'Create a new entry.' button.



ODT Rentals Online Help

Click on the field **Code**

age

Card

*

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **Month-pstart early.**

age

Card

*

M

(Alt+Up) Show tooltip

Start

Never

Never

Click on the field **Description**

age

Card

*

Month-pstart early

(Alt+Up) Show tooltip

Start

Never

Never

Enter the text **Monthly Rental - Early Per. Billing in Advance.**

age

Card

MONTH-PSTART EARLY

M

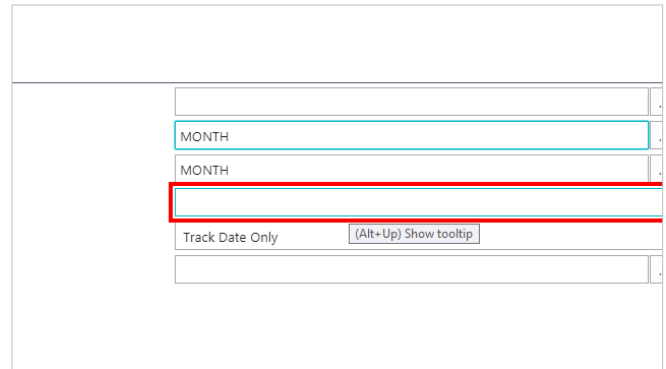
(Alt+Up) Show tooltip

Start

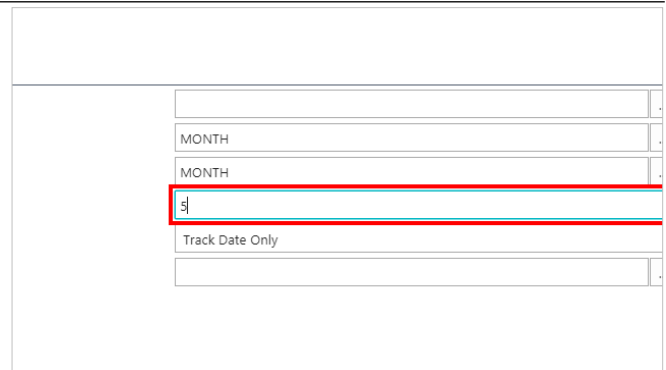
Never

Never

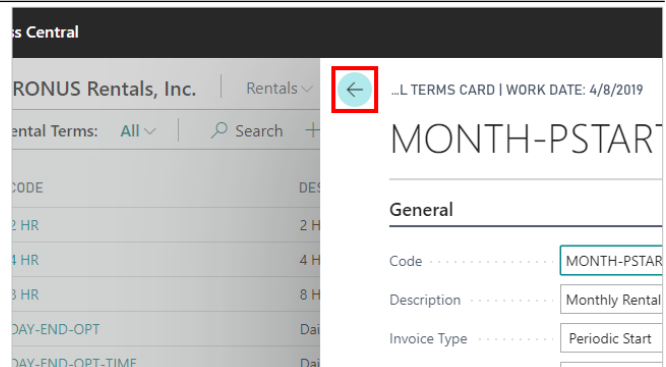
Click on the field **Early Billing Date Formula**



Enter the text **5D**.



Click on the back button



2.6.11. How to Set Up Daily Rental Terms to Summarize Rental Amount Lines

2.6.11.1. Overview

When organizations are renting product and billing using a daily rate on a contract which has a longer duration, the field, Summarize Rental Lines, on the Rental Term card, when activated will summarize the Rental Amount Lines into a single line for ease of review.

The Rental Amount Line, Starting Date-Time and Ending Date-Time, will in essence be based on the Rental Start Date and Rental Return Date.

The Rental Start Date and Rental Return Date automatically populate the Rental Billing Start Date-Time and Rental Ending Date-Time, which in turn, will automatically populate the Rental Amount Line, Starting Date-Time and Ending Date-Time on the summarized line.

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.

NOTE:

The ability to enable the Summarize Rental Lines field is restricted to a term that has a Period Code of Day, and does not have a Link Term specified, or any of the Alt term code fields populated on the term card.



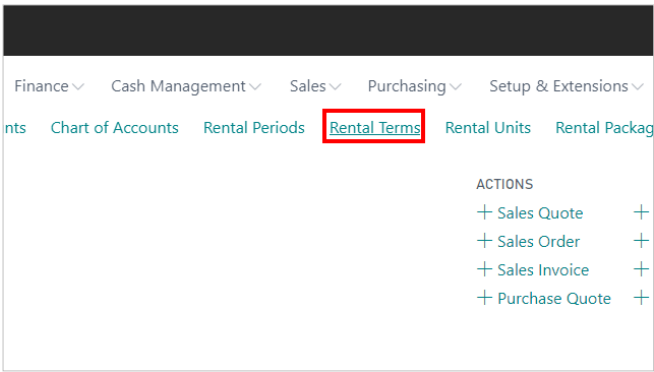
Once the Rental Term has been setup, then the Rental Price cards on the applicable rental groups, units or rental packages can be setup.

Should an organization chose not to setup Rental Price cards, then when the Rental Term is entered on a Rental Line for a rental group, unit or rental package, the Rental Unit Price field will require the entry of the daily rate.

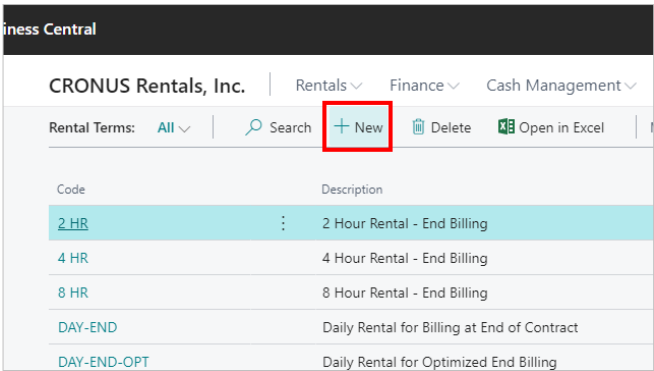
2.6.11.2. **How to Set Up Daily Rental Terms to Summarize Rental Amount Lines**

The following example demonstrates the setting up of a daily Rental Term for summarizing the Rental Amount Lines.

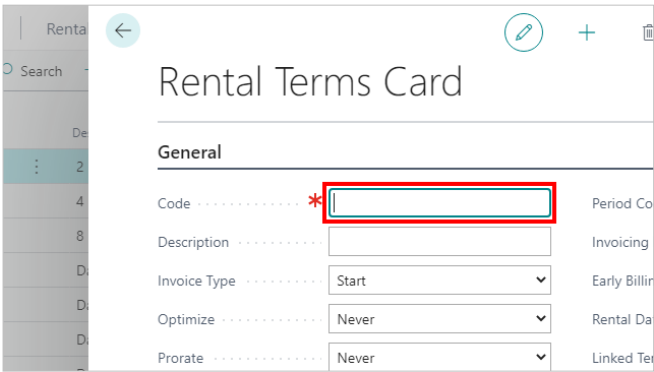
Click on the navigation menu item **Rental Terms**



Click on the navigation menu item **New**



Click on the field **Code**





Enter the text **Daily-Pend**.

The screenshot shows the 'Rental Terms Card' form. The 'Code' field is highlighted with a red box and contains an asterisk (*). The 'Description' field is empty. The 'Invoice Type' is set to 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The left sidebar shows a list of rental terms with '2' selected.

Click on the field **Description**

The screenshot shows the 'Rental Terms Card' form with the title 'DAILY-PEND'. The 'Code' field contains 'DAILY-PEND'. The 'Description' field is highlighted with a red box and is empty. The 'Invoice Type' is 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The left sidebar shows a list of rental terms with '2' selected.

Enter the text **Daily Rental - Per. Billing in Arrears Summarized**.

The screenshot shows the 'Rental Terms Card' form with the title 'DAILY-PEND'. The 'Code' field contains 'DAILY-PEND'. The 'Description' field is highlighted with a red box and is empty. The 'Invoice Type' is 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The left sidebar shows a list of rental terms with '2' selected.

Click on the field **Invoice Type**

The screenshot shows the 'Rental Terms Card' form with the title 'DAILY-PEND'. The 'Code' field contains 'DAILY-PEND'. The 'Description' field contains 'Per. Billing in Arrears Summarized'. The 'Invoice Type' field is highlighted with a red box and shows a dropdown menu with 'Start' selected. The 'Optimize' field is 'Never' and the 'Prorate' field is 'Never'. The left sidebar shows a list of rental terms with '2' selected.



ODT Rentals Online Help

Click on the item **Periodic End** in the list

Click on the field **Period Code**

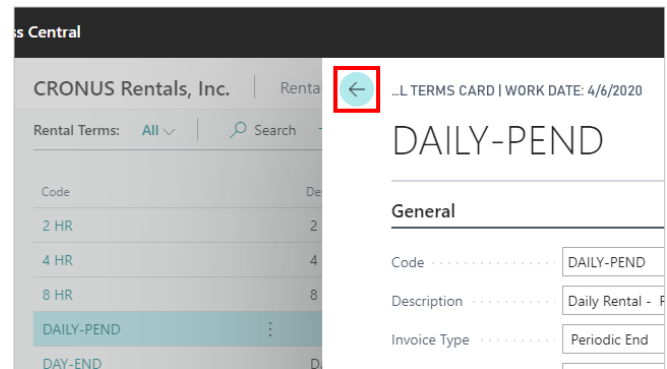
Click on the link in cell **Code** with the value **DAY**

NOTE:
The Period Code selected must be a Day period,
otherwise the Summarize Rental Lines field will not be
able to be activated.

Click on the toggle field Summarize Rental Lines

Clicking on the Summarize Rental Lines field, will
activate the feature.

Click on the back button



2.7. Setup User Defined Billing Terms

2.7.1. User Defined Billing Terms Overview

2.7.1.1. Overview

The User Defined Billing Term provides organizations with the ability to build template billing schedules to meet their billing requirements.

On the User Defined Billing Term, multiple billing schedule records can be created with each record being for a specific number of days, for various billing methods, rental terms and specify whether pricing is to be used from rental price cards or not.

The following picture is an example of the User Defined Billing Term Lines where there is an initial billing record and multiple subsequent billing records.

Lines		Manage								
	Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Pror...	Fixed	Use Pricing From Setup	
→	0D	4D	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	5D	25D	Fixed	DAY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	26D	75D	Fixed	DAY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	76D	9999D	Fixed	DAY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

The User Defined Billing term can be setup as the Default Rental Term on a Customer, a Rental Group or Rental Unit.

When the term defaults to or is entered on the header of a quote or contract in the Rental Term field, then the User Defined Billing Term, Billing Schedule lines can be viewed from the document main menu, Quote or Contract as applicable.

When a User Defined Term is selected on a rental line for a group or unit, then from the Line menu option, the Billing Schedule lines can be viewed and edited.

When on a rental line the selected Rental Term is a User Defined Billing Term, then the Rental Unit Prices are not displayed on the Rental Lines.

When the pricing is not to be used from price cards, then the Rental Rates are to be entered on the Billing Schedule lines.

The Rental Amount lines, which are used for billing, will be generated based on the Billing Schedule lines.

The following picture displays the Billing Schedule from the Rental Line on a contract with the above User Defined Billing Term after the entry of a Rental Rate on each line



On the Rental Contract, Rental Line, the Rental Billing Start Date is April 11, 2022.

Billing Schedule

Code

IB DAILY FIXED

Description

Initial Billing Fixed Fee with Fixed...

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Prici... From Setup
→ 4/11/2022	⋮ 4/14/2022	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	150.00	<input type="checkbox"/>
4/15/2022	5/9/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
5/10/2022	7/23/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
7/24/2022	12/8/2049	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>

In the example, the prices vary depending on the From Date and To Dates, which are calculated from the Day From and Day To on the User Defined Billing Term Lines in relation to the Rental Billing Start Date on the Rental Line.

If an invoice was processed on May 31, 2022, the invoice would include the following amounts excluding tax:

- April 11 to April 15, 2022 the fixed fee rate @ 150.00
- April 16 to May 11, 2022 (20 days) @ 25.00 per day = 500.00
- May 12 to May 31, 2022 (20 days) @ 20.00 per day = 400.00

The subtotal on the invoice would be 1,050.00.

NOTE:

Fixed Fee charge terms have the field, Rental Date Time Tracking automatically set to Tracking Date and Time as the Period Code must be based on Period Duration which tracks the rental based on date and time When used on User Defined Billing Terms the Fixed Fee terms in the lines are treated as if the Rental Date Time Tracking was set to Tracking Date Only.

Rental Features which can be used in conjunction with User Defined Billing Terms

- Bill Until Date
- Rental Invoicing Worksheet
- Rental Line Discounts
- Rental Swap and Rental Exchange
- Partial Shipments and Partial Returns
- Undo Shipment
- Undo Return

- Roll up Pricing Rental Packages
- Corrective Rental Credit Memo
- Auto Credit Memo
- Copy Document
- Blank Quantity to Rent
- Advanced Proforma
- Integration to Jobs
- Visual Availability Calendars

Rental Features which currently cannot be used in conjunction with User Defined Billing Terms

- Optimized Rental Terms cannot be specified on the term or billing schedule lines
- The Billing Cycle Date feature



- The Rental Calendar feature for specifying days as Non-Billable or Standby Charges
- Price Allocation Rental Packages
- Default Blank Return Date, or clear the Return Date on the line
- Metered Usage Billing. When a Rental Term specified on the User Defined Billing Term - Lines has Metered Usage enabled, the metered usage is recorded as an adjustment. The Billing of Metered usage when Use Pricing From Setup is flagged is not currently included in the User Defined Billing Term feature.
- Periodic Usage
- Transfer Contract does not allow the transfer of rental lines having a User Defined Billing Term.

2.7.2. Overview of the User Defined Billing Term Menus and Fields

The following picture displays the User Defined Billing Term list in display mode.

User Defined Billing Terms and Billing Schedule lines can be created or edited from the list.

User Defined Billing Terms:

All

Search

+ New

Delete

Edit List

View Change Log Entries

General

Code ↑	Description	Set as Billing Schedule
DURATION DAILY RATE	Duration Variable Daily Term	<input checked="" type="checkbox"/>
IB DAILY DURATION	Initial Billing Fixed Fee with Duration Variable Daily Term	<input checked="" type="checkbox"/>
IB DAILY FIXED	Initial Billing Fixed Fee with Fixed Variable Daily Term	<input checked="" type="checkbox"/>
IB FIXED-RUN ON EOM	Initial Billing Fixed Fee with Run On End Of Month Billing	<input checked="" type="checkbox"/>
IB RUN ON MONTH	Initial Billing Fixed Fee with Run on Month Billing in Advance	<input checked="" type="checkbox"/>

Lines

Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup
0D	3D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4D	24D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25D	74D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
75D	9999D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2.7.2.1. Overview of the General Tab Menu Options

The following provides information on the menu options on the User Defined Billing Term list.

New: For creating a new User Defined Billing Term which opens the page in a new window.

Delete: For deleting the selected term and related billing schedule lines.

Edit List: Opens the list in edit mode so that modifications can be made to the lines, if required.

View Change Log Entries: This menu option is only displayed if the Change Log Setup has been configured for the Rental Term table. When selected only the change log entries related to the selected User Defined Billing Term - General tab will be displayed.

2.7.2.2. Overview of the General Tab Fields

The General tab, consists of the Code and Description fields from the base Rental Term card. Enter a Code for

the term and a brief description indicative of what the term is.

The field, Set as Billing Schedule, is automatically checked when the term is created, and indicates that the term is a User Defined Billing Term with Billing Schedule lines. This field cannot be modified.

NOTE:

The other fields on a base Rental Term Card are not used on the User Defined Billing Term.

2.7.2.3. Overview of the Lines Menu Options

The Lines is a sub-form linked to the User Defined Billing Term where the Billing Schedule template lines are configured specifying how the billing is to occur.

The Lines – Manage Menu options include:

- **New Line**
- **Delete Line**
- **View Change Log Entries:** This menu option is only displayed if the Change Log Setup has been configured for the User Defined Rental Term Line table.

2.7.2.4. Overview of the Line Fields

The following describes the purpose and use of the User Defined Billing Term, Line fields which are displayed by default.

- **Day From and Day To:** Depending on the Billing Method selected these fields are where either date formulas are entered specifying the day count from the Rental Billing Start Date, or date formulas such as CM (Current Month) in the Day To field.

NOTE:

For the Rental Billing Start Date to be billed, the first billing schedule line Day From must be set to 0D.

On the subsequent lines, when entering date formulas specifying the day count it is mandatory that the Day From date formula be continuous from the previous line Day To date formula.

For example, if the first billing schedule line is to be for billing 5 days and the Day From is set to 0D, then the date formula in the Day To field would be 4D.

On each subsequent line being created the Day From date formula must be continuous from the previous line's, Day To date formula.

For example, if the first line has a 4D in the Day To field, then on the next line the Day From date formula must be 5D.

The suggested Day To date formula to use to specify an indefinite date is 9999D.

Billing Method: The Billing Method options can specify when the billing is to occur and/or how the billing is to occur.

The Billing Method options include Initial Billing, Fixed, Duration Based, Run on and Final Billing.

The following describes the purpose and use of the Billing Methods.

Initial Billing: This method option, as it indicates is for specifying the initial billing and thus can only be used on the first line and can only be used once in the Lines.

Rental terms that may be used with this option include a fixed fee/flat rate term, a daily rate term or a term with Prorate enabled.

Fixed: Specifies that the Rental Rates for the Rental Term is set for the number of days specified by the Day From and Day To on each of the lines. The Fixed option is normally used when the Rental Rate declines, the longer the rental is.

The Fixed Billing Method would be set on multiple lines for specific number of days with for the same Rental Term, but declining Rental Rates.

Duration Based: This option is used when the rental rate to be charged is based on the number of days the



customer will have the units.

Multiple lines with continuous ranges of Day From and Day To are configured. All lines with the Billing Method of Duration Based must have the same rental term. The Rental Rates are specified on the Rental Line, Billing Schedule.

Run On: The option is used for specifying that the periodic billing is to be continually processed using the rental term specified.

This method is normally used after the first line when it has the Billing Method of Initial Billing.

Final Billing: This Billing Method option can only be setup on the Rental Lines, Billing Schedule when the actual Rental Return or Rental Billing End Date is confirmed.

The From Date, To Date, Billing Method of Final Billing, Rental Term are to be configured, and if applicable, Use Pricing Setup enabled.

NOTE:

The population of the Day From and Day To fields are to be populated when the Billing Method selected is Initial Billing, Fixed, Duration Based or Final Billing.

When the Billing Method is Run On, the Day From and Day To fields do not require population on the User Defined Billing Term Lines.

Rental Terms Code: The Rental Term is to be selected that is to be used when processing the billing schedule line.

- **NOTE:** Optimized Rental Terms cannot be used on User Defined Billing Term Lines.
- **Rental Period Code:** Displays the Rental Period Code that is on the selected Rental Term card.
- **Invoicing Period Code:** Displays the Invoicing Period Code that is on the selected Rental Term card, except for Fixed Fee charge terms where this field is not used.
- **Prorate:** Displays whether the Rental Term selected has the Prorate field configured for proration.
- **Fixed:** Displays whether the Rental Term is a fixed fee/flat fee term.
- **Use Pricing From Setup:** When checked the rental price for the term will be used from the Rental Price card setup on the rental group or unit.

The Lines change dynamically to display the lines related to the Code line selected.

An additional field, Code, is available to add to the Lines, which displays the User Defined Billing Term Code the line is related to.

NOTES:

When the User Defined Billing Term is entered on a Rental Line, then on the Line - Billing Schedule, the Day From and Day To fields dynamically change to From Date and To Date.

The fields display as dates in relation to the date formulas in the User Defined Billing Term Lines, and the number of days from the Rental Billing Start Date on the rental line.

2.7.3. How to Setup User Defined Billing Terms

2.7.3.1. User Defined Billing Term Setup Overview

When the field, Use Pricing From Setup, is checked on a line, then the rental unit price will be used from the Rental Price card setup on the group or unit for the Rental Term on the lines. If there is not a Rental Price card setup for the term, then the unit price will be 0.00 on the Rental Amount Lines.

When the field, Use Pricing From Setup, is not checked, then on the Rental Line, Billing Schedule the Rental Rates must be entered on the lines prior to invoicing.

NOTE:

On the Rental Line, Billing Schedules the lines and settings on the lines can be modified.



When an Initial Billing or Final Billing record is included in the Lines, the Rental Term, Invoicing Type on those records need to be in line with the Rental Term, Invoicing Type on the Fixed, Duration or Run On records.

For example:

- If the Rental Term on the records with the Billing Method of Fixed, Duration or Run On have an Invoicing Type of Periodic End, then the Rental Term on the Initial Billing or Final Billing records are to have an Invoicing Type of End or Periodic End.
- If the Rental Term on the Fixed, Duration or Run On records have an Invoicing Type of Periodic Start, then the Rental Term on the Initial Billing or Final Billing records are to have an Invoicing Type of Start or Periodic Start.

Fixed Fee charge (flat fee) Rental Terms must have an Invoicing Type of End or Start.

- When a Fixed Fee Rental Term is setup on the User Defined Billing Term lines, then the term will be treated as if the Rental Date Time Tracking field was set to Track Date Only rather than Track Date and Time.
- If subsequent lines have Rental Terms with an Invoicing Type of Periodic End, then the Fixed Fee Rental Term are to have an Invoicing Type of End.
- If subsequent lines have Rental Terms with an Invoicing Type of Periodic Start, then the Fixed Fee Rental Term are to have an Invoicing Type of Start.

2.7.3.2. How to Setup a User Defined Term with the Fixed Billing Method

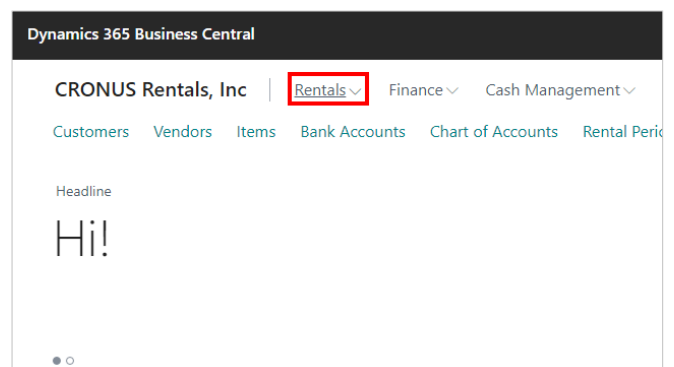
The following demonstrates the setup of a User Defined Billing Term with a Billing Method of Fixed and a Daily Rental Term.

A Billing Method of Fixed is used as the rental rate to be used for invoicing will vary for each Day From and Day To range.

In this example, the rental prices will differ according to the following breakdown of the number of days. The Rental Rates will be specified on the Rental Line, Billing Schedule of a quote or contract.

- the first 4 days
- the next 21 days
- the next 50 days
- all days from 51 and greater

Click on the navigation menu item popup **Rentals**





Click on the navigation menu item **New**

NUS Rentals, Inc | Rentals ▾ Finance ▾ Cash Management ▾ Sales ▾

efined Billing Terms: All ▾ | 🔍 Search **+ New** 🗑️ Delete 🛠️ Edit List 📄 View C

	Description
ATION DAILY RATE	Duration Variable Daily Term
ILY DURATION	Initial Billing Fixed Fee with Dur
ILY FIXED	Initial Billing Fixed Fee with Fixe

Click on the cell **Code**

Billing Terms: All ▾ | 🔍 Search **+ New** 🛠️ Edit List 🗑️ Delete 📄 View C

General

Code ↑	Description
→	
DURATION DAILY RATE	Duration V
IB DAILY DURATION	Initial Billin
IB DAILY FIXED	Initial Billin
IB FIXED-RUN ON EOM	Initial Billin
IB RUN ON MONTH	Initial Billin

Enter the text **variable daily rate**.

← User Defined Billing Terms

🔍 Search **+ New** 🛠️ Edit List 🗑️ Delete 📄 View Change Log Entries

General

Code ↑	Description
→	
DURATION	Duration Variable Daily Term
IB DAILY C	Initial Billing Fixed Fee with Duration Varia

Click on the cell **Description**

🛠️ Edit List 🗑️ Delete 📄 View Change Log Entries

	Description	Set as Bi Schedule
y Rate		
DAILY RATE	Duration Variable Daily Term	
RATION	Initial Billing Fixed Fee with Duration Variable Daily Term	
ED	Initial Billing Fixed Fee with Fixed Variable Daily Term	
N ON EOM	Initial Billing Fixed Fee with Run On End Of Month Billing	
MONTH	Initial Billing Fixed Fee with Run on Month Billing in Advance	



Enter the text **Variable Daily Rate**.

Edit ListDeleteView Change Log Entries

	Description	Set as Bill Schedule
DAILY RATE		
DAILY RATE	Duration Variable Daily Term	
RATION	Initial Billing Fixed Fee with Duration Variable Daily Term	
ED	Initial Billing Fixed Fee with Fixed Variable Daily Term	
N ON EOM	Initial Billing Fixed Fee with Run On End Of Month Billing	
MONTH	Initial Billing Fixed Fee with Run on Month Billing in Advance	

Click on the cell **Day From**

Day To

3D

24D

74D

9999D

LinesManage

Day From	Day To	Billing Method	Rental T
		Initial Billing	

Enter the text **0d**.

Day To

3D

24D

74D

9999D

LinesManage

Day From	Day To	Billing Method	Rental Terms Code	Ren Per Coc
		Initial Billing		

Click on the cell **Day To**

Day To

3D

24D

74D

9999D

LinesManage

Day From	Day To	Billing Method	Rental Terms Code
→ 0d		Initial Billing	



Click on the lookup button in the cell **Rental Terms Code**

Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed
3D	Fixed				<input type="checkbox"/>	<input type="checkbox"/>

Click on the link in cell **Code** with the value **DAILY-PEND**

Code	Description
2 HR	2 Hour Rental - End
4 HR	4 Hour Rental - End
8 HR	8 Hour Rental - End
DAILY-PEND	Daily Rental - Per. B

Day From	Day To	Billing Method
→ 0D	3D	Fixed

Click on the cell **Day From**

Day From	Day To	Billing Method	Rental T
→ 0D	3D	Fixed	DAILY-

Enter the text **4d**.

Day From	Day To	Billing Method	Rental T
→ 0D	3D	Fixed	DAILY-
→		Initial Billing	



Click on the cell **Day To**

Lines		Manage	
Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
→ 4D		Initial Billing	

Enter the text **24d**.

Lines		Manage	
Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
→ 4D	24d	Initial Billing	

Click on the cell **Billing Method**

Lines		Manage	
Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
→ 4D	24d	Initial Billing	

Click on the item **Fixed** in the list

Lines		Manage	
Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Initial Billing	DAILY-PEND
4D	24D	Run On	DAILY-PEND
25D	74D	Fixed	DAILY-PEND
→ 75D	9999D	Duration Based	DAILY-PEND



Click on the cell **Rental Terms Code**

Lines | Manage						
Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	
0D	3D	Fixed	DAILY-PEND	DAY	DAY	
→ 4D	24D	Fixed				

Click on the link in cell **Code** with the value **DAILY-PEND**

Lines | Manage						
Day From	Day To	Billing Method	Code	Description		
0D	3D	Fixed	2 HR	2 Hour Rental - End		
→ 4D	24D	Fixed	4 HR	4 Hour Rental - End		
			8 HR	8 Hour Rental - End		
			DAILY-PEND	Daily Rental - Per. B		

periodic
150.00

Click on the cell **Day From**

Lines | Manage						
Day From	Day To	Billing Method	Rental Terms Code			
0D	3D	Fixed	DAILY-PEND			
→ 4D	24D	Fixed	DAILY-PEND			

Enter the text **25d**.

Lines | Manage						
Day From	Day To	Billing Method	Rental Terms Code			
0D	3D	Fixed	DAILY-PEND			
4D	24D	Fixed	DAILY-PEND			
→ 25d		Initial Billing				



Click on the cell **Day To**

Day To

3D

24D

74D

9999D

Lines

Manage

Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
4D	24D	Fixed	DAILY-PEND
→ 25d		Initial Billing	

Enter the text **74d**.

Day To

3D

24D

74D

9999D

Lines

Manage

Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
4D	24D	Fixed	DAILY-PEND
→ 25D		Initial Billing	

SALES

SOPT-WEEK

Click on the cell **Billing Method**

Day To

3D

24D

74D

9999D

Lines

Manage

Day From	Day To	Billing Method	Rental Terms Code	Rent Perio Cod
0D	3D	Fixed	DAILY-PEND	DA
4D	24D	Fixed	DAILY-PEND	DA
→ 25D	74d	Initial Billing		

Initial Billing

Click on the item **Fixed** in the list

Day To

3D

24D

74D

9999D

Lines

Manage

Day From	Day To	Billing Method	Rental Terms Code	Rent Perio Cod
0D	3D	Fixed	DAILY-PEND	DA
4D	24D	Fixed	DAILY-PEND	DA
→ 25D	74D	Initial Billing		

Initial Billing

Run On

Fixed

Du Fixed based

Initial Billing



Click on the cell **Rental Terms Code**

Lines | Manage						
Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	
0D	3D	Fixed	DAILY-PEND	DAY	DAY	
4D	24D	Fixed	DAILY-PEND	DAY	DAY	
→ 25D	74D	Fixed				

Click on the lookup button in the cell **Rental Terms Code**

Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed
3D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>
24D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>
74D	Fixed				<input type="checkbox"/>	<input type="checkbox"/>

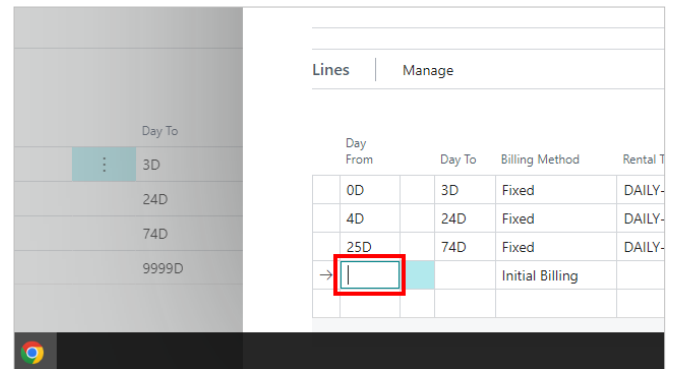
Click on the link in cell **Code** with the value **DAILY-PEND**

Lines | Manage						
Day From	Day To	Billing Method	Code	Description		
0D	3D	Fixed	2 HR	2 Hour Rental - End		
4D	24D	Fixed	4 HR	4 Hour Rental - End		
→ 25D	74D	Fixed	8 HR	8 Hour Rental - End		
			DAILY-PEND	Daily Rental - Per. B		

Click on the cell **Day From**

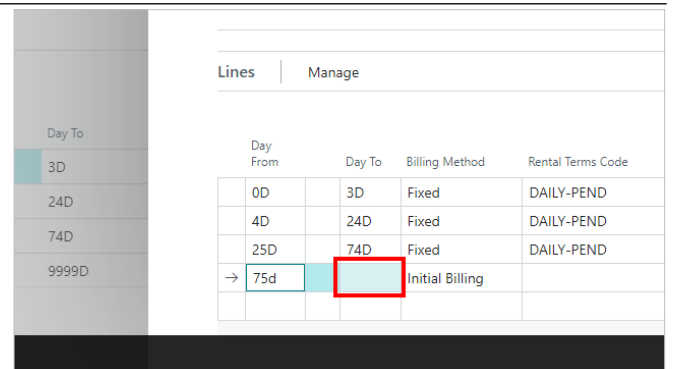
Lines | Manage						
Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	
0D	3D	Fixed	DAILY-PEND	DAY	DAY	
4D	24D	Fixed	DAILY-PEND	DAY	DAY	
→ 25D	74D	Fixed	DAILY-PEND	DAY	DAY	

Enter the text **75d**.



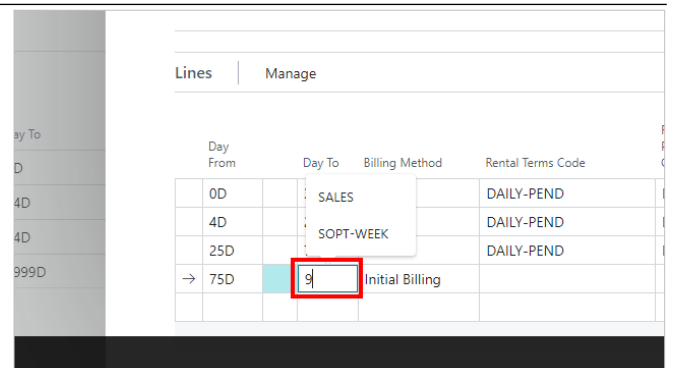
Day From	Day To	Billing Method	Rental T
0D	3D	Fixed	DAILY-
4D	24D	Fixed	DAILY-
25D	74D	Fixed	DAILY-
→		Initial Billing	

Click on the cell **Day To**



Day From	Day To	Billing Method	Rental Terms Code
0D	3D	Fixed	DAILY-PEND
4D	24D	Fixed	DAILY-PEND
25D	74D	Fixed	DAILY-PEND
→	75d	Initial Billing	

Enter the text **9999d**.



Day From	Day To	Billing Method	Rental Terms Code
0D	SALES		DAILY-PEND
4D	SOPT-WEEK		DAILY-PEND
25D			DAILY-PEND
→	75D	Initial Billing	

2.7.3.3. Examples of User Defined Billing Terms and Related Billing Schedule

The following are some examples of User Defined Billing Term Lines setups, how the rental line Billing Schedules are displayed, and an example of how invoicing would use the schedules.

2.7.3.3.1. Fixed Billing Method with Variable Daily Rental Rates

The following picture displays an example of the setup of the User Defined Billing Term, Lines with a Billing Method of Fixed with a Daily Rental Term.

The price to be used will vary for each Day From and Day To range and be specified on the Rental Line, Billing Schedule

Lines

Manage

	Day From		Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup
→	0D	:	3D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4D		24D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	25D		74D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	75D		9999D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The following picture displays the Rental Line - Billing Schedule after the entry of the Rental Rates.

When the Billing Method is Fixed, then variable daily rental rates means that the Rental Rate specified on the Billing Schedule lines will vary and be used for each of the specified date ranges.

Billing Schedule

Code VARIABLE DAILY RATE

Description Variable Declining Daily Rental R...

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Prici... From Setup	
→ 4/11/2022	:	4/14/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
4/15/2022		5/9/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
5/10/2022		7/23/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
7/24/2022		12/8/2049	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>

If the customer needs to be invoiced for 10 days, then the invoice will contain:


- 1 detailed line for 4 days. Apr 11, 2022 to Apr 14, 2022 with 4 @ 30.00/Day = 120.00
- 1 detailed line for 6 days. Apr 15, 2022 to Apr 20, 2022 with 6 @ 25.00/Day = 150.00

2.7.3.3.2. Initial Billing and Fixed Billing Method Combination

The following picture displays an example of the setup of the User Defined Billing Term, Lines with the first record containing a Billing Method of Initial Billing, and subsequent lines containing the Billing Method of Fixed.

- The first record will contain a Fixed Fee Rental Term
- Subsequent lines will contain a Daily Rental Term

Subsequent lines will contain a Daily Rental Term.

Lines		Manage								
	Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup	
→	0D	:	3D	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4D		24D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	25D		74D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	75D		9999D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The following picture displays the Rental Line - Billing Schedule after the entry of the Rental Rates.

Billing Schedule

Code

IB DAILY FIXED

Description

Initial Billing Fixed Fee with Fixed...

	From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Prici... From Setup
→	4/11/2022	:	4/14/2022	Initial Billing	FIXED FEE END	FIXED		150.00	<input type="checkbox"/>
	4/15/2022		5/9/2022	Fixed	DAILY-PEND	DAY	DAY	25.00	<input type="checkbox"/>
	5/10/2022		7/23/2022	Fixed	DAILY-PEND	DAY	DAY	20.00	<input type="checkbox"/>
	7/24/2022		12/8/2049	Fixed	DAILY-PEND	DAY	DAY	15.00	<input type="checkbox"/>

If the customer needs to be invoiced for 30 days, then the invoice will contain:

- 1 detailed line for 4 days. Apr 11, 2022 to Apr 14, 2022 with 1 @ 150.00/ Fixed Fee = 150.00
- 1 detailed line for 25 days. Apr 15, 2022 to May 9, 2022 with 25 @ 25.00/ Daily Rental = 625.00
- 1 detailed line for 1 day. May 10, 2022 to May 10, 2022 with 1 @ 20.00/ Daily Rental = 20.00

2.7.3.3.3.


Duration Based Billing Method with Variable Daily Rates

The following picture displays an example of the setup of the User Defined Billing Term, Lines with a Billing Method of Duration Based with a Daily Rental Term.

The price will vary for each Day From and Day To range and be specified on the Rental Line, Billing Schedule.

Lines

Manage



Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup	
→ 0D	:	3D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4D		24D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25D		74D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
75D		9999D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The following picture displays the Rental Line - Billing Schedule after the entry of the Rental Rates.

Duration Based means that the price used when invoicing will be the rental rate based on the number of days the customer will have the units.

Billing Schedule

Code

DURATION DAILY RATE

Description

Duration Declining Daily Rental ...

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Prici... From Setup
→ 4/11/2022	⋮ 4/14/2022	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
4/15/2022	5/9/2022	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
5/10/2022	7/23/2022	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
7/24/2022	12/8/2049	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>

Example 1:

The customer rental duration is 10 days, meaning the Rental Return Date and/or the Rental Billing End Date is April 20, 2022.

If the customer is to be invoiced for the 10 days, then the rate used for invoicing will be 25.00 and the invoice will contain:

- 1 detailed line for Apr 11, 2022 to Apr 20, 2022 with 10 @ 25.00/Day = 250.00

Example 2:

The customer rental duration is 30 days, meaning the Rental Return Date and/or the Rental Billing End Date is May 10, 2022.

If the customer is to be invoiced for 10 days, then the rate used for invoicing will be 20.00 and the invoice will contain:


- 1 detailed line for Apr 11, 2022 to Apr 20, 2022 with 10 @ 20.00/Day = 200.00.

2.7.3.3.4. Initial Billing and Duration Based Billing Method Combination

The following picture displays an example of the setup of the User Defined Billing Term, Lines with the first record containing a Billing Method of Initial Billing, and subsequent lines containing the Billing Method of Duration Based.

- The first record will contain a Fixed Fee Rental Term
- Subsequent lines will contain a Daily Rental Term

Subsequent lines will contain a Daily Rental Form.

Lines | Manage										
	Day From		Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup
→	0D	:	3D	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4D		24D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	25D		74D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	75D		9999D	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The following picture displays the Rental Line - Billing Schedule after the entry of the Rental Rates.

When there is Initial Billing record, then when invoicing, the Initial Billing record will be invoiced first, then the subsequent records will be checked to determine the Rental Rate to be used for the duration of the contract line.

Billing Schedule

Code

IB DAILY DURATION

Description

Initial Billing Fixed Fee with Dura...

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Prici... From Setup
→ 4/11/2022	⋮ 4/14/2022	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	150.00	<input type="checkbox"/>
4/15/2022	5/9/2022	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
5/10/2022	7/23/2022	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
7/24/2022	12/8/2049	Duration Based	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>

Example 1:

If the duration of the rental is 30 days and the customer will be invoiced for 30 days, then the invoice will contain:

- 1 detailed line for 4 days. Apr 11, 2022 to Apr 14, 2022 with 1 @ 150.00/ Fixed Fee = 150.00
- 1 detailed line for 26 days. Apr 15, 2022 to May 10, 2022 with 26 @ 20.00/ Daily Rental = 520.00

Example 2:

If the duration of the rental is 90 days and the customer is to be invoiced for 30 days, then the invoice would contain:

- 1 detailed line for 4 days. Apr 11, 2022 to Apr 14, 2022 with 1 @ 150.00/ Fixed Fee = 150.00
- 1 detailed line for 26 days. Apr 15, 2022 to May 10, 2022 with 26 @ 15.00/ Daily Rental = 390.00

2.7.3.3.5.

Initial Billing and Run On Billing Method Combination

The following picture displays an example of the setup of the User Defined Billing Term, Lines with the first record containing a Billing Method of Initial Billing, followed by a record containing the Billing Method of Run On.

- The first record will contain a Fixed Fee Rental Term
- The second line will contain a Prorated Monthly Rental Term with Endorse End of Monthly enabled

The second line will contain a prorated monthly rental term with End of Month enabled

Lines | Manage									
Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup	
0D	CM	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
→	:	Run On	MONTH-PEND-PRO-EOM	MONTH	MONTH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

The Initial Billing Rental Term can be a fixed fee charge (flat fee), a daily rate, or a prorated value of the Monthly Rate, with the Day From and Day To fields populated.

When the Run On Billing Method is selected, then the Day From and Day To fields do not require the entry of the date formulas on the record, when there is only 1 Run On record.

The Rental Term on the Run On record can be any rental term, excluding optimized terms.

The rental price to be used can be entered in the Rental Rate field.

Or if there are Rental Price cards setup on the rental groups or units and the price is to be used from the price cards, then the Use Pricing From Setup can be checked.



When possible, it is more efficient to quote against the Rental Unit Group because any related unit will do. You can then assign the exact unit once agreement has been received from the customer or can be specified when the quote has been converted to a contract. Because you have many units within a group means you can double-book the group as you will assign a specific unit later.

To use Rental Unit Groups to their full advantage is to group like-product together. This is relevant when you quote rates to customers. While prices can be added directly to the rental units card this method will slow you down especially when quoting on the fly. Quoting prices from group level is more efficient than drilling-down to each unit to view its individual price rates.

Another time-save is with regular administrative upkeep such as updating price changes and adding promotions. From this perspective it is obviously easier to update all the price rates from one place on a group as opposed to updating each product in your rental fleet.

Organizing your rental units into logical groups enables you to track unit level detail from a group level. Such information includes pricing, pictures, documents, etc.

IMPORTANT:

When an organization is going to link units to inventory items, these units cannot be assigned to a rental unit group.

Rental Unit cards hold the information that is required to rent, price the rentals and account for the units. Information on the rental fields on the unit card is available by clicking on the field caption. In addition, the rental unit card displays information related to the rental status of the rental unit and related group, if applicable.

For additional information on the quantity and on rent fields, please see the ODT Rental Online Help in the Reviewing Rentals - Rental Units Review.

Rental Units can be linked to existing Fixed Assets, Items, Resources or G/L Accounts. This link is for informational purposes only when linking to Resources and G/L Accounts.

When linked to a Fixed Asset, and on Rental Management Setup, the Location Mandatory and Rental FA Transfer Mandatory are enabled, then when Location code on the Rental Unit is changed, then the Fixed Asset, Rental Location will be automatically updated to the same Location and visa versa. The Dimensions on the Rental Unit and Fixed Asset are synchronized.

For information on linking rental units, see ODT Rental Online Help, Setup Rentals, Setup Rental Units, How to Link a Rental Unit to a Master Record.

When linked to an Item, the unit cannot be assigned to a rental group. With linking to an item, Transfer Orders are created and posted when Rental Reservations are created and deleted by the system, which in turn creates Item Ledger Entries. This ensures that the Item Availability by Location displays accurately.

The Rentals provides the ability to copy a Rental Unit to create one or more Rental Units.

In the Copy Rental Unit request page, users have the option of selecting to use the Rental Unit No. Series or to use User Specified Nos. When the No. Series for the Rental Units has the Manual Nos. field checked, then the automatically generated numbers in the New Rental Unit No. field can be modified.

Should Serial Nos. and/or Locations be used, the user can specify these in this feature to automatically assign these to the units.

In addition to providing a quick and easy way to create multiple Rental Units, the Copy Rental Unit provides the ability to automatically create Fixed Assets and link units to the assets created.

For information on this feature, please see the ODT Rental Online Help, Setup Rentals, Setup Rental Units - How to Copy Rental Units and Automatically Create Fixed Assets.

In the Copy Rental Unit request page, options are provided for the copying of the Rental Category, Rental Attributes and Dimensions.



The Rental Group can be renumbered using the Renumber Rental Unit Group menu option which updates the group card, and all assigned Rental Unit cards.

All related features and documents the group is on are updated including the linked master records, all rental and dispatch documents whether open or completed, and all related entries.

A Service Status can be assigned to Rental Units, should the unit need to be or be in service.

Similar to Inventory Items, Categories and Attributes can be assigned to Rental Units.

For information on this feature, see the ODT Rental Online Help, Additional Rental Processes, Rental Categories and Attributes.

ODT Rentals also provides the ability to attach a picture to Rental Unit groups and Rental Units.

Documents can be attached to Rental Unit groups, Rental Units and Rental Packages, which will flow thru to the rental transactions, when the Flow to Rental Trx field flagged.

Links and Notes can be added to Rental Unit groups, Rental Units and Rental Packages.

To learn about attaching documents, links, and notes, see the document, How to Attach Documents Links and Notes, in the Setup Rental Units book.

Rentals provides for the use of Dimensions on Rental Units, Rental Quotes and Rental Contracts similar to using Dimensions on Items, Sales Quotes and Sales Contracts.

This provides organizations flexibility in assigning Dimension Values. When Dimension Codes and Values are assigned to a Rental Unit Group, then the units assigned to the group will automatically be assigned the same codes and values.

In the processing of contracts, the Dimension Codes and Values are posted to all applicable entries the same as in processing a Sales Order or Sales Invoice.

NOTE:

The Rental Unit List by default is filtered to not display units that have the Inactive field enabled.

This filter can be cleared by selecting the funnel icon for Show Filter Pane and clearing the Inactive filtering.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, in a United States company. Therefore, the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

For information on the setup and processing of rentals using the Price Incl. VAT, see the ODT Rental Online Help, Rest of World Additional Rental Processes, Processing Rentals using Price Incl. VAT.

2.8.1.2. Rental Unit Field Definitions

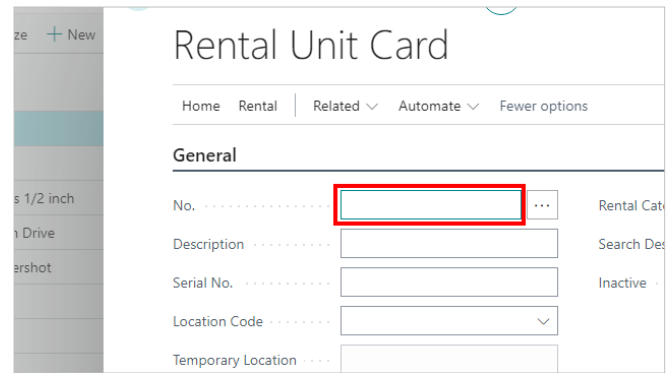
The following field definitions are for the fields that are Mandatory.

Click on the field **No.**

The No. field specifies the number of the Rental Unit based on the setup of the No. Series for Rental Units.

If the No. Series has the Default Nos. field selected, then when moving off the field the number is automatically assigned to the unit.

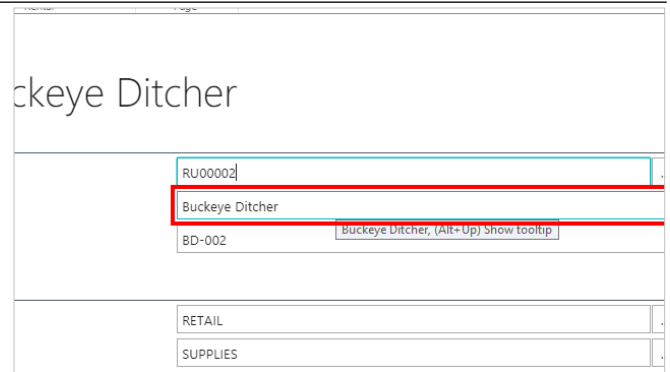
Should the No. Series have the Manual Nos. field checked, then companies can enter a number when creating the Rental Units.



The screenshot shows the 'Rental Unit Card' form. The 'No.' field is highlighted with a red box. Other fields visible include 'Description', 'Serial No.', 'Location Code', and 'Temporary Location'.

Click on the field **Description**

The Description field is for providing a description of the Rental Unit.

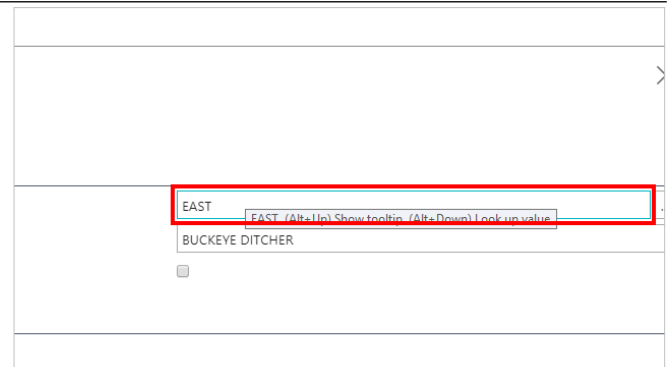


The screenshot shows the 'Rental Unit Card' form. The 'Description' field is highlighted with a red box. The value 'BUCKEYE DITCHER' is entered in the field. Other fields visible include 'No.' (RU00002), 'Serial No.' (BD-002), and 'Location Code' (EAST).

Click on the field **Location Code**

The Location Code field is only mandatory when on Rental Management Setup the field Location Mandatory is checked.

When planning on linking a Rental Unit to an Inventory Item, then the Location field must be left blank, as Locations will be managed by the item Location functionality.



The screenshot shows the 'Rental Unit Card' form. The 'Location Code' field is highlighted with a red box. The value 'EAST' is entered in the field. Other fields visible include 'No.' (RU00002), 'Description' (BUCKEYE DITCHER), and 'Serial No.' (BD-002).

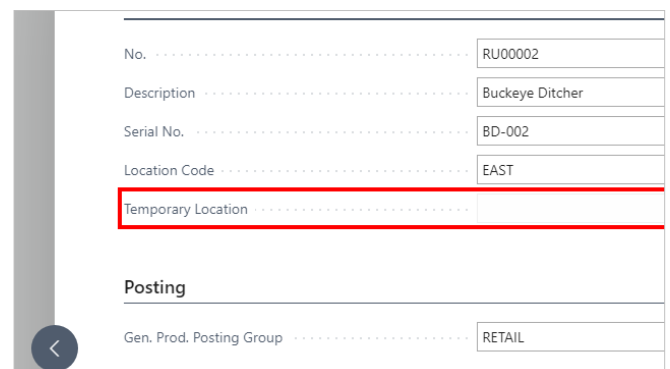
Should the unit being setup be a Rental Unit Group, then if the units to be assigned to the group will have varying Locations, then leave the Location field blank.

The Rental Units that are not assigned to a Rental Unit Group and have the Allow Overbooking field enabled, then the specification of the Location Code is not required.

If the Allow Overbooking is not enabled, then the Location Code is required.

Click on **Temporary Location**

When the Location Code is either directly changed to a Temporary Location then the Temporary Location field becomes editable and must have a description of the temporary location entered.



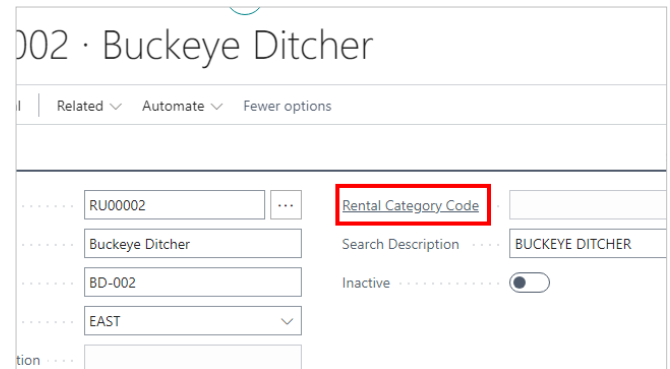
The screenshot shows the 'Rental Unit Card' form. The 'Temporary Location' field is highlighted with a red box. The value 'EAST' is entered in the field. Other fields visible include 'No.' (RU00002), 'Description' (BUCKEYE DITCHER), and 'Serial No.' (BD-002).

If the Rental Unit has been returned to a Temporary Location, then the description entered when returning the unit will be displayed in this field.

Click on the link **Rental Category Code**

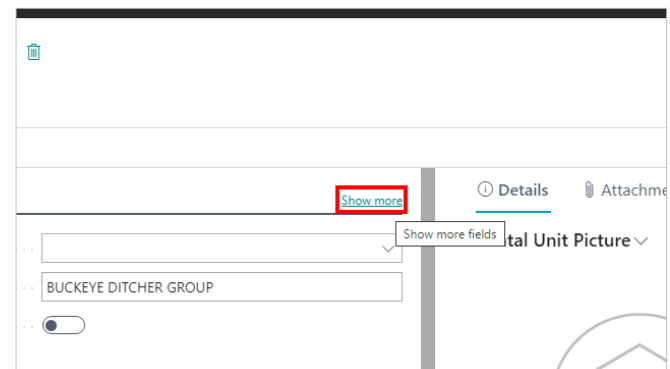
The Rental Category Code field is used to assign a user defined Rental Category to the unit for tracking and filtering purposes.

Rental Attributes can be linked to Rental Categories, which then populate the Attributes ribbon page for uses to assign Rental Attribute Values to the unit.



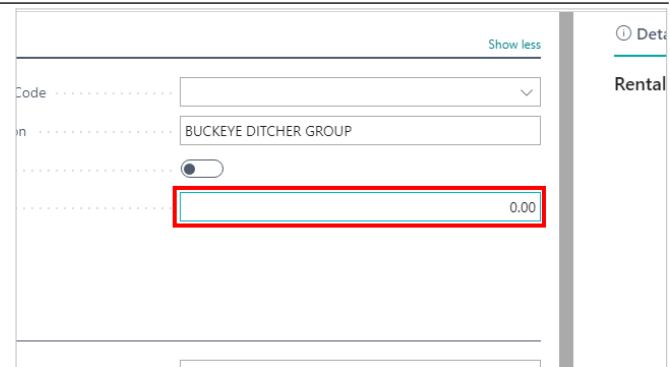
To learn about Rental Categories, see the ODT Rental Online help, Additional Rental Processes, Rental Categories and Attributes.

Click on the button **Show more**



Click on the field **Sales Price**

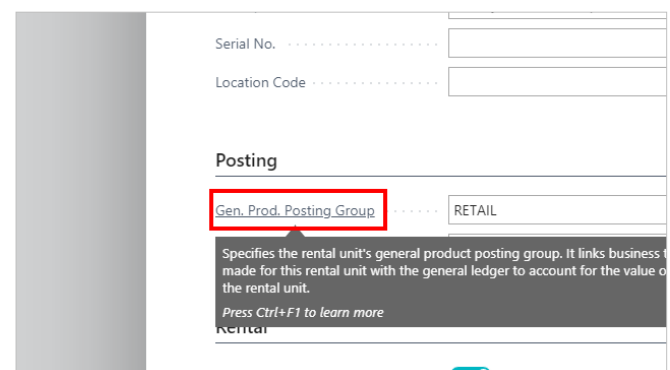
A suggested sales price can be entered on the rental units, which will be displayed on the Rental Unit Statistics.



When a suggested sales price is entered on a rental unit group, then the price will be displayed on the units assigned to the group, and their rental unit statistics.

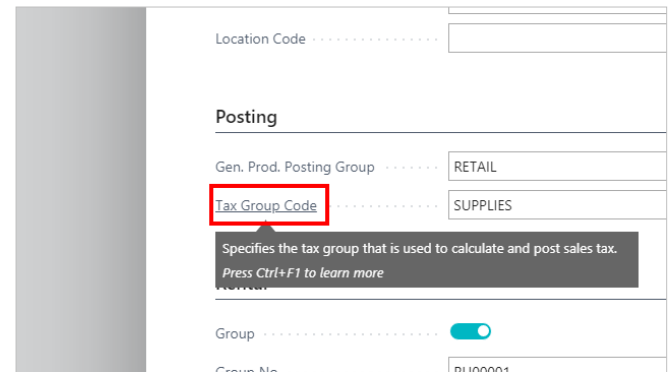
Click on the link **Gen. Prod. Posting Group**

The General Product Posting Group is required and is used in conjunction with the General Posting Setup to determine what G/L Account(s) the rental related revenues are to be posted to in the Chart of Accounts.



Click on the link **Tax Group Code**

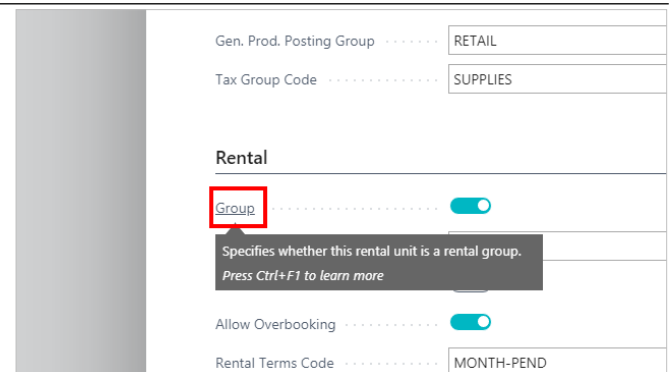
The Tax Group Code field by default is used to determine what taxes should be calculated and is used in conjunction with the Tax Jurisdiction in the Tax Details to determine what G/L Accounts the taxes are to be posted to in the Chart of Accounts. Should the unit Price Card have a different Tax Group Code, then the Tax Group Code on the price card will be used.



Click on the link **Group**

The Group field is used to specify that the unit is a rental group.

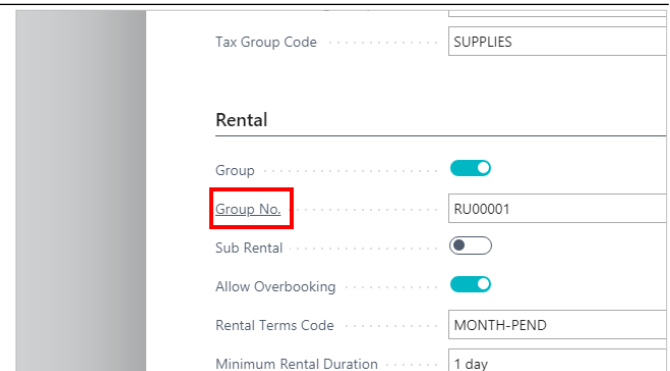
When the unit is not a group, then this field is to be left as is.



Click on the link **Group No.**

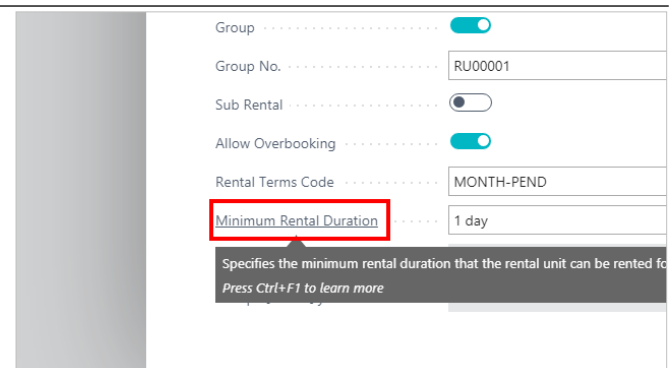
This field is to be populated when a unit is linked to a group.

When a unit is not to be linked to a group, then this field must be blank.



Click on the link **Minimum Rental Duration**

The Minimum Rental Duration is used for specifying the "shortest" duration the rental unit can be rented for.



If tracking by date only, then the entry in this field would be entered in relation to days. For example, if the shortest rental allowed is a single day, then enter 1 day.

If tracking rentals by date and time, then the entry in this field can be specified as hours, minutes or even seconds rather than days, if applicable.

The following field definitions are for the fields that are optional.

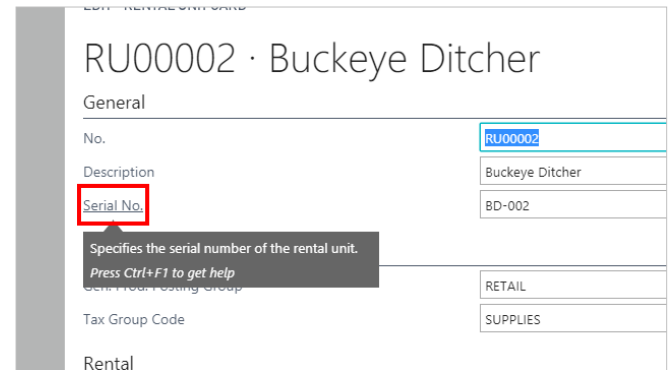
Click on the link **Serial No.**

The Serial No. field is optional.

Should your organization utilize Serial Nos. for rentals, then enter the Serial No.

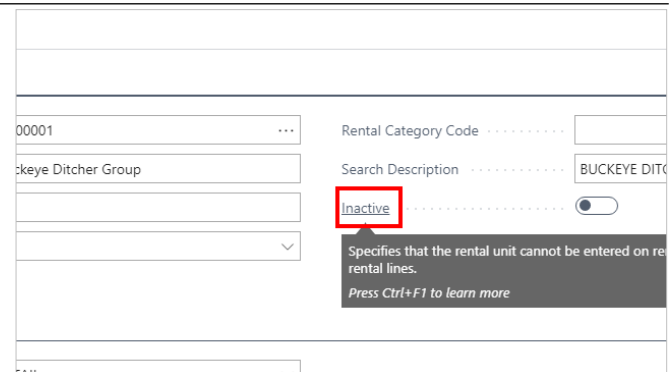
NOTE:

When rental units are linked to Fixed Assets, then enter the same Serial No. as entered on the Fixed Asset card.



Click on the link **Inactive**

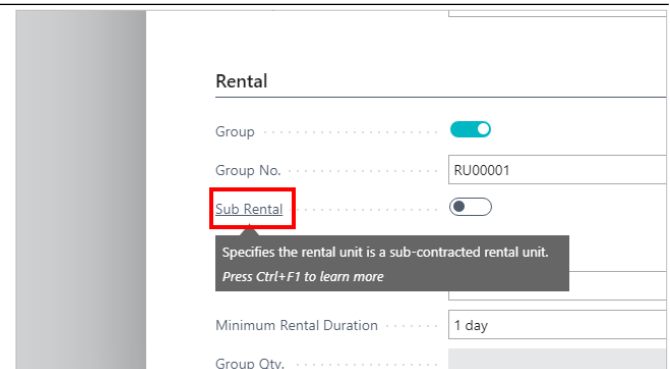
The Inactive field is used to specify the unit is no longer available for renting.



Click on the link **Sub Rental**

The Sub Rental field is to be checked if the unit is sub-rented from a vendor. Enabling this field is restricted to units assigned to a Rental Group.

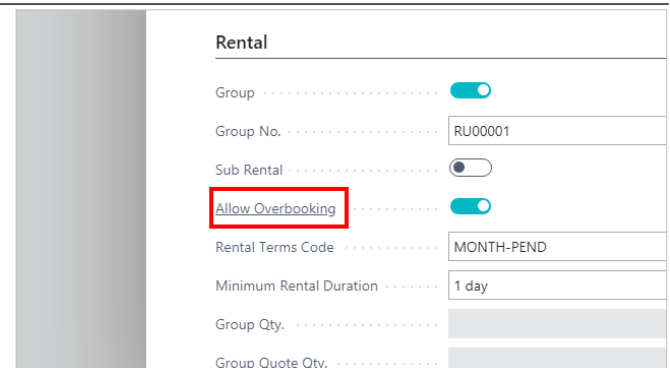
The unit is used on a contract when the organization sub-contracts a unit to fulfill customer demand. This enables the ability to automatically create a Purchase Order to a specified vendor for the unit directly from the Rental Contract.



Click on the link **Allow Overbooking**

The Allow Overbooking field is for specifying that a rental unit group or unit not assigned to a group can be overbooked.

When checked the unit can be entered on multiple Rental Contracts for the same dates or have a Rental Quantity of greater than 1.



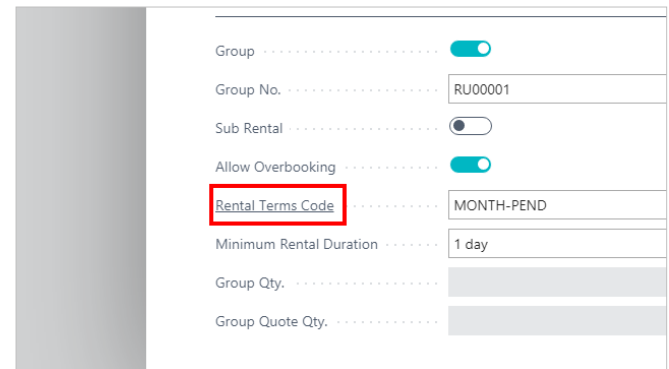
This feature would normally be used on groups where sub-rentals may be used or when the unit not linked to an Item, where there are multiple quantities available for rent.

The functionality related to this field does not control the rental line entry when a unit is linked to an Inventory Item. This is due to Item Availability controlling the unit availability, rather than rental availability functionality.

Click on the link **Rental Terms Code**

The Rental Terms code is optional.

When on Rental Management Setup the field, Use Unit Rental Terms is selected, then the term entered on the unit will default to the rental line.



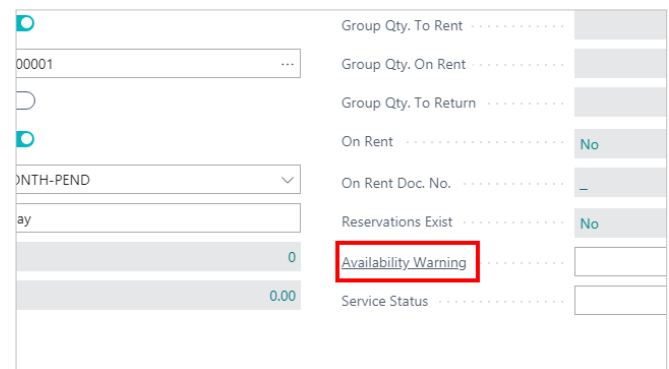
If the term is left blank with this setup, then if the Customer has a rental term setup, which has defaulted to the quote or contract General tab, then this term will automatically populate the rental line field when the unit is entered on the line.

When there is no term specified on the unit, the customer or the quote or contract General tab, then the term must be selected on the Rental Line.

Click on the link **Availability Warning**

The Availability Warning field is strictly for Rental Unit Groups only.

The quantity entered provides for a color coded quantity warning on the Group Availability Matrix.



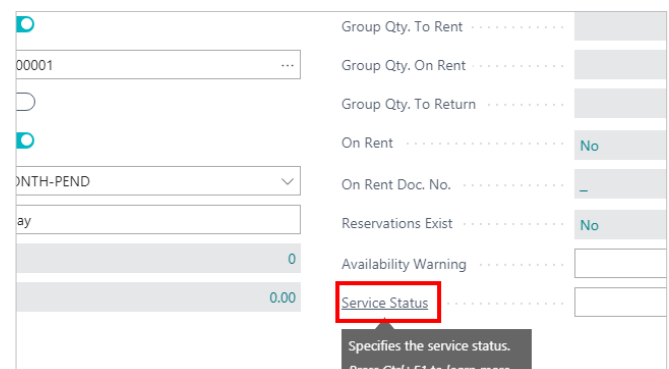
For example, when the warning quantity is set to 1 on a group unit.

When there is only 1 child unit available in the group, then the quantity in the Group Availability Matrix for the dates where there is only 1 child unit available for rent on the group, the quantity will be in the color of Yellow.

When the child units available are below the warning quantity, then the quantity in the Group Availability Matrix will be in Red.

The Service Status field is not used with a group unit and is only to be used on units that are either assigned to a group or not assigned to a group.

Click on the link **Service Status**



For Service Status options where the unit will not be available to rent, then the system creates an open ended reservation entry, with the Starting Date being set to the Work Date when selected. The Reservation will prevent the unit from being selected on a quote or contract Rental Line.

The field provides the following options:

- **Blank:** Which means the unit is currently not due for service, in service and is available to rent.

- **Needs Service - Available for Rent:** Which indicates the unit can still be rented out, although does need service.
- **Needs Service - Unavailable for Rent:** Which means the unit cannot be rented out due to the service that needs to be done.
- **In Service - Unavailable for Rent:** Which means the unit cannot be rented out.
- **In Service - Available for Rent:** This option indicates that although the unit is in service, it can be entered on a quote or contract Rental Line and can be rented out.
- **Expired:** This option indicates the unit is no longer available for any purposes. Selecting this option will automatically check the Inactive field on the General tab of the unit.
- **Reserved:** When selected, will reserve the unit indefinitely starting from the users Work Date.

Click on the link **Link Type**

The Link Type field provides the ability to link the Rental Unit to a Fixed Asset, Item, Resource or G/L Account.

When a unit is linked to a Fixed Asset and Serial Nos. are specified on the Fixed Asset, then the same Serial No. is to be entered on the Rental Unit.

When a unit is linked to an inventory item, then there must be stock available in the Location(s) setup to Allow Rentals, in order to rent the unit.

If there are not any available or not enough available in the rental location entered on the Rental Line of a Rental Contract, an error will occur advising as such.

Rental Terms Code	MONTH-PEND
Minimum Rental Duration	1 day
Group Qty.	
Group Quote Qty.	
Link	
Link Type	Fixed Asset
Specifies whether a rental unit is linked to an item, fixed asset, resource or G/L Account. Press Ctrl+F1 to get help	

Click on the link **Link Code**

The Link Code field is to be populated, if the Link Type field is populated and the unit is being linked to a specific master record of a Fixed Asset, Item, Resource or G/L Account.

The drop down list will include only the records based on the Link Type field selected.

For example, if Fixed Assets is selected in the Link Type field, then the drop down list will display only Fixed Assets.

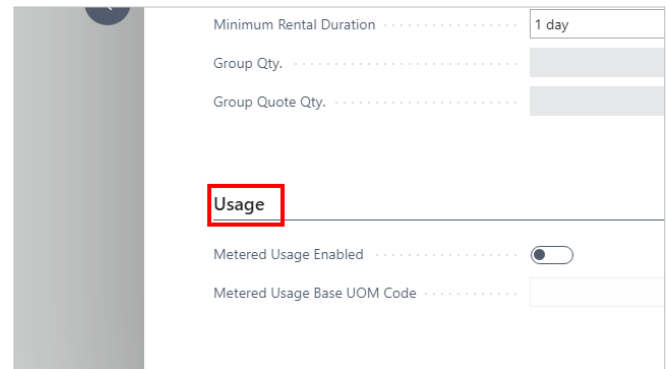
When units are linked to other Master cards such as, Items, Resources, Fixed Assets or G/L Accounts the Dimensions from the master records can be automatically applied to the units when the selected item, resource, asset, or G/L Account is selected.

If Dimensions have been setup on the unit and then the Link code is selected, a pop-up will ask if you want to transfer the Dimensions from the selected master records. If Yes is selected, then the dimension configuration on the master card being linked to will be automatically setup on the rental unit.

Rental Terms Code	MONTH-PEND
Minimum Rental Duration	1 day
Group Qty.	
Group Quote Qty.	
Link	
Link Type	Fixed Asset
Link Code	FA000100
Specifies the number of the linked product based on the link type chosen. Press Ctrl+F1 to get help	

Click on **Usage**

The Usage Fast Tab contains options for enabling the Metered Usage and Periodic Usage features.



The applicable fields only need to be completed when an organization is:

- Billing and/or tracking metered usage on rental units.
- Billing based on Periodic Usage, which bills based on days in use, and if applicable, days on standby.

To learn about the setup and processing when using Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

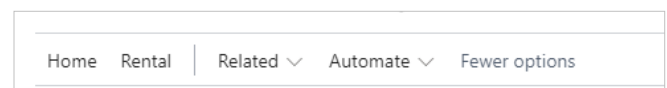
To learn about the setup and processing when using Periodic Usage and Standby Charges, see the ODT Rental Online help, Additional Rental Processes, Periodic Usage and Standby Charges.

There are a number of informational fields on the Rental Unit card including Group Qty., Group Qte. Qty., Group Qty. To Rent, Group Qty. On Rent, Group Qty. to Return, On Rent, On Rent Doc. No and Reservations Exist.

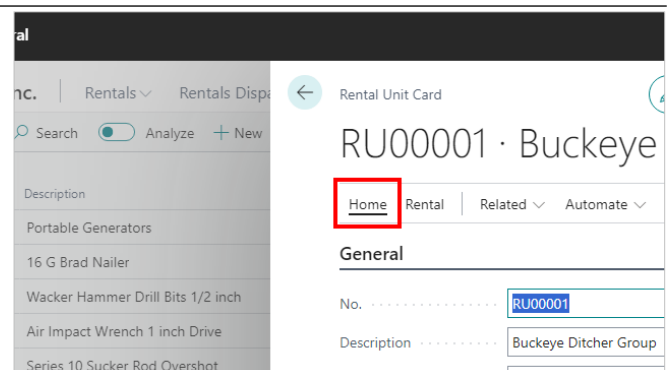
For information on these fields, see the ODT Rental Online help, Reviewing Rentals, Rental Units Status.

2.8.1.3. Rental Unit Menu Options

Menu Options



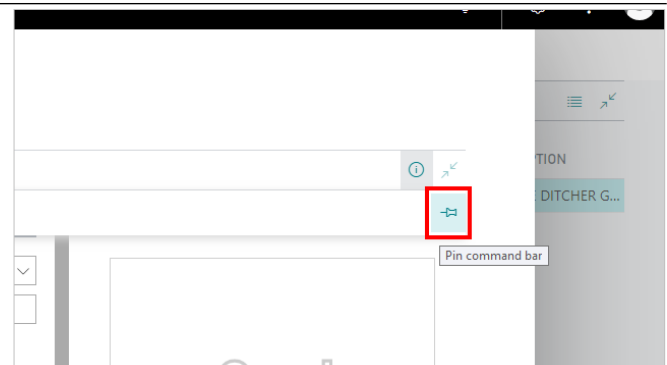
Click on the navigation menu item popup **Home**



Click on the button **Pin**

Dynamics 365 Business Central provides the ability to "Pin" the sub-menu options (command bar) by clicking on the "Pin" at the right of the sub-menu.

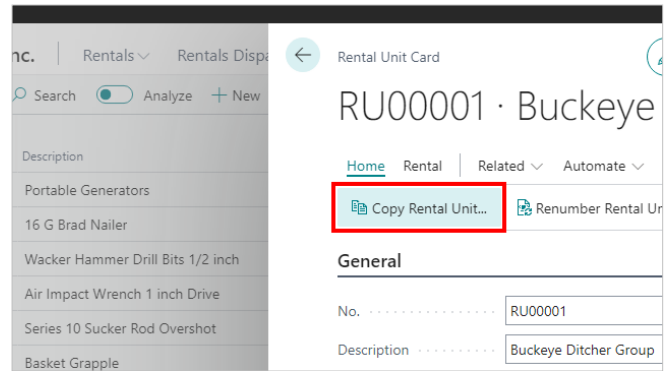
When any of the sub-menus is pinned and any menu option is selected, then the sub-menu options available for each menu item will be automatically displayed.



Click on the navigation menu item **Copy Rental Unit...**

The Copy Rental Unit is used for copying the unit to setup new like units.

To learn about the Copy Rental Unit functionality, see the ODT Rental Online help, How to Copy Rental Units using the No. Series, How to Copy Rental Units using User Specified Nos. and How to Copy Rental Units and Automatically Create Fixed Assets in the Setup Rentals, Setup Rental Units category.

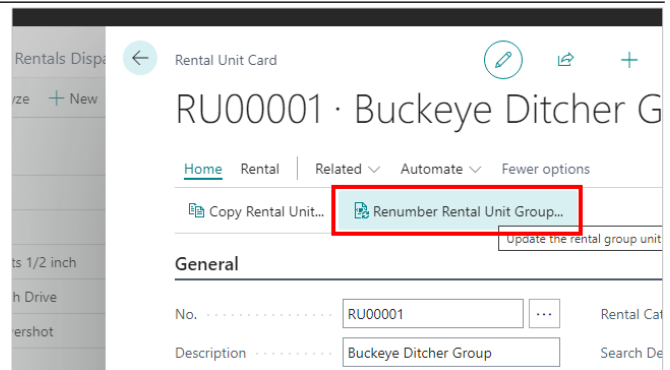


Click on the navigation menu item **Renumber Rental Unit Group...**

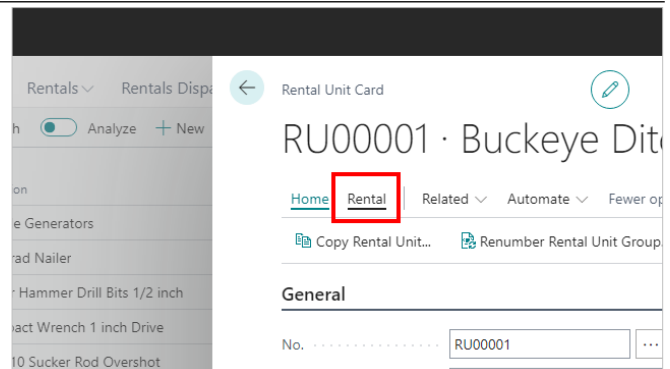
The Renumber Rental Unit Group is used for renumbering a Rental Group.

A pop-up will occur where the new group no. can be specified.

If selected on a Rental unit that is not a group a pop-up message will occur advising that this cannot be done as the unit does not have the Group field checked.

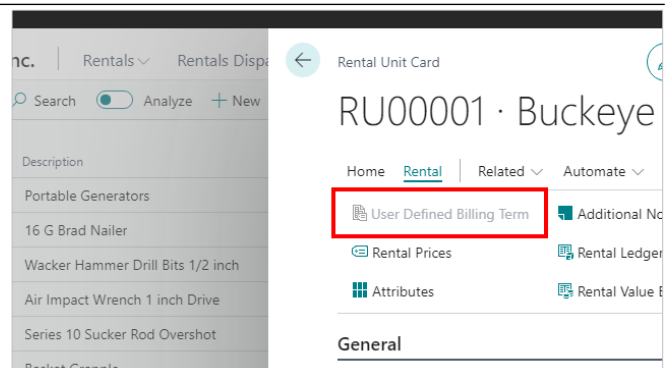


Click on the navigation menu item popup **Rental**



Click on the navigation menu item **User Defined Billing Term**

The User Defined Billing Term option is selectable when in the Rental Term field on the unit card has a User Defined Billing Term selected, which will then display the configuration of the term.



The User Defined Billing Term enables organizations to configure cascading rental terms for billing based on days from and to the date that billing is to commence on.

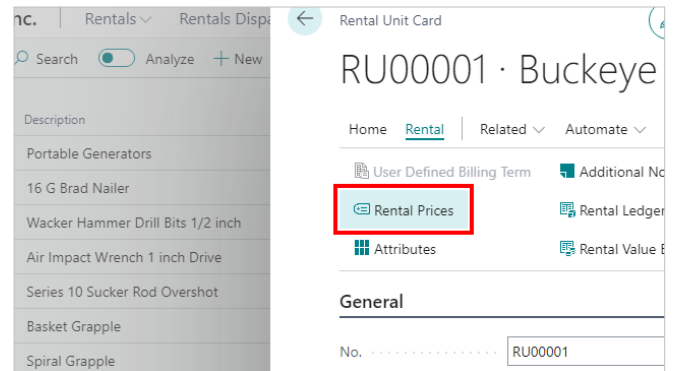
To learn about User Defined Billing Terms, see the ODT Rental Online help, Setup Rentals, then Setup User Defined Billing Terms.

ODT Rentals Online Help

Click on the navigation menu item **Rental Prices**

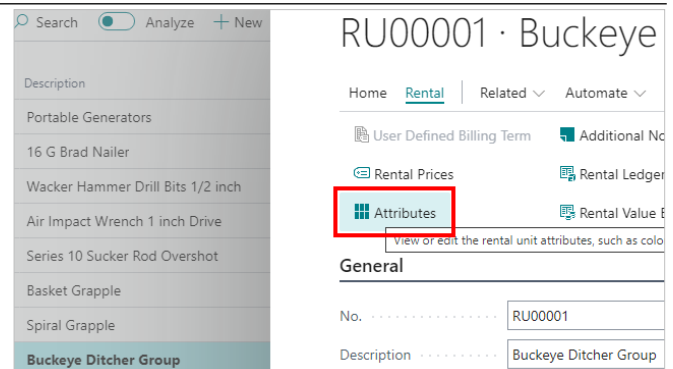
The Rental Prices option is used to setup Rental Prices on a per Rental Term basis for the unit group or unit. Prices can be setup for both local currency and for foreign currency.

To learn about setting up Rental Prices on a unit, see the ODT Rental Online help, How to Add Rental Prices to a Rental Unit located in the Setup Rentals, Setup Rental Units.


Click on the navigation menu item **Attributes**

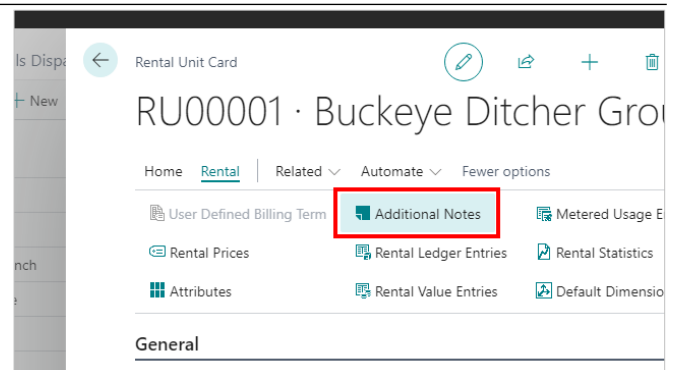
The Attributes option is used to add user defined Rental Attributes to the unit.

To learn about Rental Attributes, see the ODT Rental Online help, Additional Rental Processes, Rental Categories and Attributes.


Click on the navigation menu item **Additional Notes**

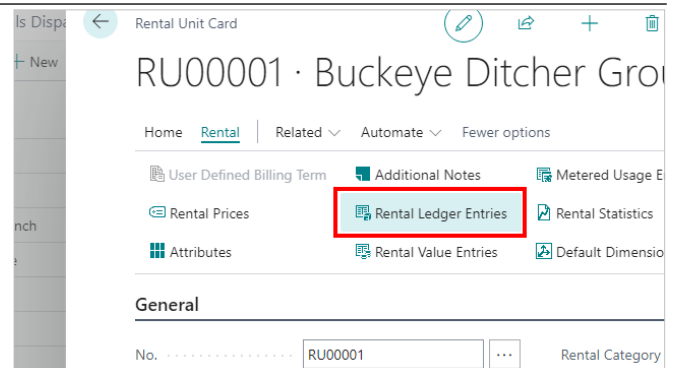
The Additional Notes option is used to predefine standard text codes and/or description comments to default to Rental Quotes and Rental Contracts and define which rental documents they are to print on.

To learn about Additional Notes, see the ODT Rental Online help, Additional Rental Processes, Additional Notes for Rentals.


Click on the navigation menu item **Rental Ledger Entries**

The Rental Ledger Entries option will open a window, which will display all movement entries created when the unit has been shipped and returned from a Rental Contract.

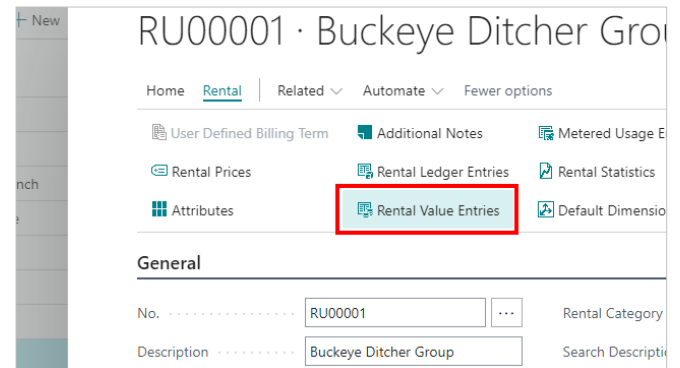
To learn about Rental Ledger Entries, see the ODT Rental Online help, Reviewing Rentals, Rental Entries.



Click on the navigation menu item **Rental Value Entries**

The Rental Value Entries option will open a window, which will display all revenue entries created when the unit rental has been invoiced.

To learn about Rental Value Entries, see the ODT Rental Online help, Reviewing Rental, Rental Entries.

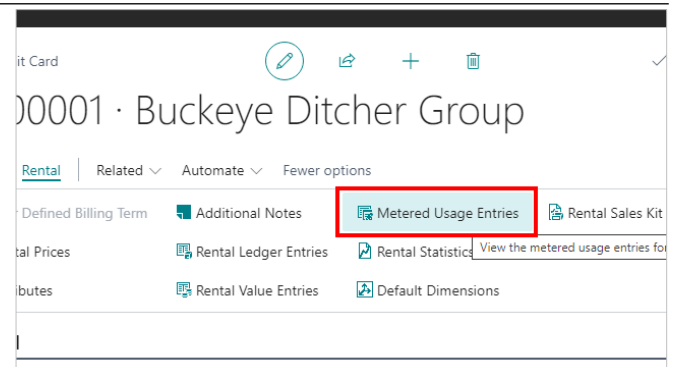


The screenshot shows the 'RU00001 · Buckeye Ditcher Group' page. The 'Rental' tab is selected. In the 'Related' section, 'Rental Value Entries' is highlighted with a red box. Other options visible include 'User Defined Billing Term', 'Additional Notes', 'Metered Usage Entries', 'Rental Prices', 'Rental Ledger Entries', 'Rental Statistics', 'Attributes', and 'Default Dimensions'. The 'General' section shows 'No. RU00001' and 'Description Buckeye Ditcher Group'.

Click on the navigation menu item **Metered Usage Entries**

The Metered Usage Entries option will open a window, which will display all usage tracking entries created, when using the Metered Usage feature.

To learn about Metered Usage Entries, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

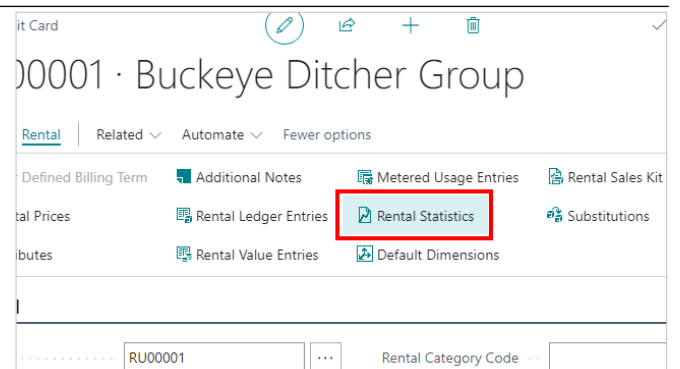


The screenshot shows the 'RU00001 · Buckeye Ditcher Group' page. The 'Rental' tab is selected. In the 'Related' section, 'Metered Usage Entries' is highlighted with a red box. Other options visible include 'User Defined Billing Term', 'Additional Notes', 'Rental Sales Kit', 'Rental Prices', 'Rental Ledger Entries', 'Rental Statistics', 'Attributes', and 'Default Dimensions'. The 'General' section shows 'No. RU00001' and 'Description Buckeye Ditcher Group'.

Click on the navigation menu item **Rental Statistics**

The Rental Statistics option is only available when the unit is linked to a Fixed Asset. When selected, then rental statistics related to the Fixed Asset, rental revenues, etc are displayed.

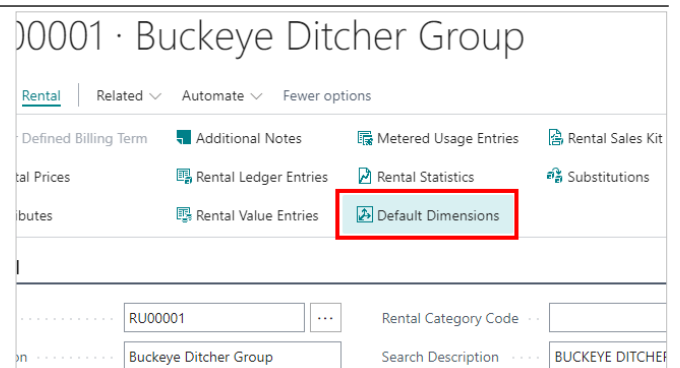
To learn about Rental Statistics, see the ODT Rental Online help, Reviewing Rental, Rental Units, Rental Unit Statistics with Profitability Analysis.



The screenshot shows the 'RU00001 · Buckeye Ditcher Group' page. The 'Rental' tab is selected. In the 'Related' section, 'Rental Statistics' is highlighted with a red box. Other options visible include 'User Defined Billing Term', 'Additional Notes', 'Metered Usage Entries', 'Rental Sales Kit', 'Rental Prices', 'Rental Ledger Entries', 'Rental Statistics', 'Attributes', and 'Default Dimensions'. The 'General' section shows 'No. RU00001' and 'Description Buckeye Ditcher Group'.

Click on the navigation menu item **Default Dimensions**

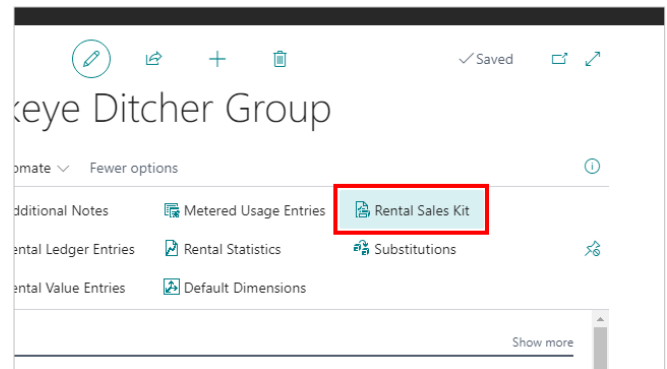
The Default Dimensions option provides the ability to assign Dimension Codes and Values as applicable to rental units.



The screenshot shows the 'RU00001 · Buckeye Ditcher Group' page. The 'Rental' tab is selected. In the 'Related' section, 'Default Dimensions' is highlighted with a red box. Other options visible include 'User Defined Billing Term', 'Additional Notes', 'Metered Usage Entries', 'Rental Sales Kit', 'Rental Prices', 'Rental Ledger Entries', 'Rental Statistics', 'Attributes', and 'Default Dimensions'. The 'General' section shows 'No. RU00001' and 'Description Buckeye Ditcher Group'.

Click on the navigation menu item **Rental Sales Kit**

The Rental Sales Kit option is used to predefine suggested or required product to be sold along with the rental unit being rented.



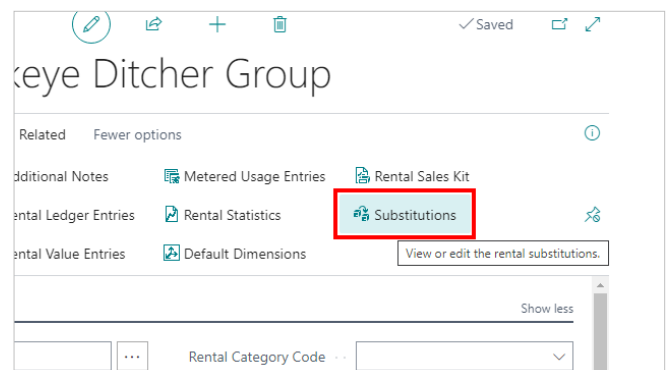
Items, Item Charges, Resources, G/L Accounts, Fixed Assets, Standard text codes, and description comments can be included in the kit. The kit lines will default to Rental Quote and Rental Contract, Sales Lines.

To learn about Rental Sales Kits, see the ODT Rental Online help, Additional Rental Processes, Rental Sales Kits.

Click on the navigation menu item **Substitutions**

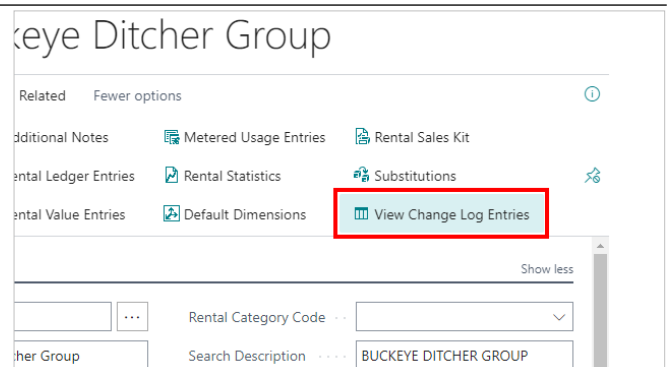
The Substitutions option provides the ability to setup substitutes which are used in the Rental Exchange feature.

To learn about the Rental Exchange feature, see the ODT Rental Online help, Processing Rentals, Swapping Rental Units, Rental Exchange, then How to Exchange Units from Different Groups.



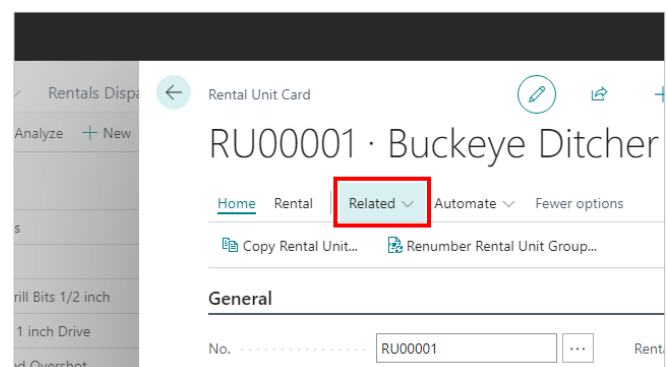
Click on the navigation menu item **View Change Log Entries**

The View Change Log Entries option is only visible when the Rental Unit table has been setup in the Change Log and the Change Log is activated.



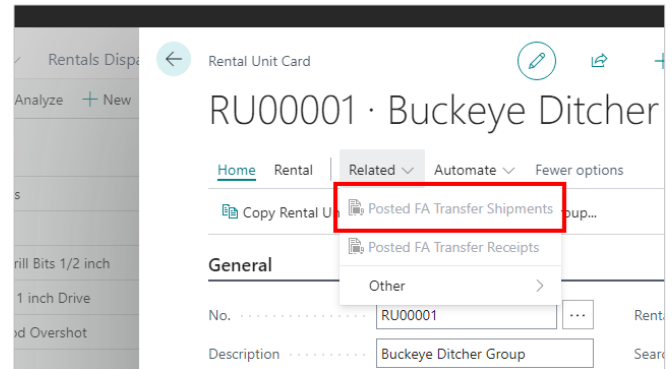
The menu option Related contains 2 additional menu options not included in the Rental menu options, plus an Other menu option that includes all the menu options from the Rental menu.

Click on the navigation menu item popup **Related**



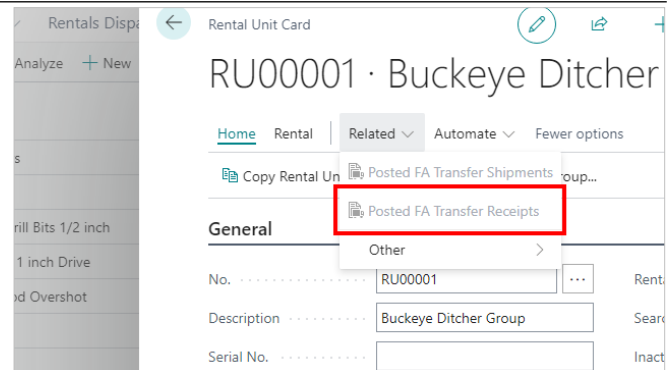
Click on the navigation menu item **Posted FA Transfer Shipments**

The Posted FA Transfer Shipments menu option, when the unit is linked to a Fixed Asset, will open a window which will display all FA Transfer Shipments related to the unit and asset.



Click on the navigation menu item **Posted FA Transfer Receipts**

The Posted FA Transfer Receipts menu option, when the unit is linked to a Fixed Asset, will open a window which will display all FA Transfer Receipts related to the unit and asset.

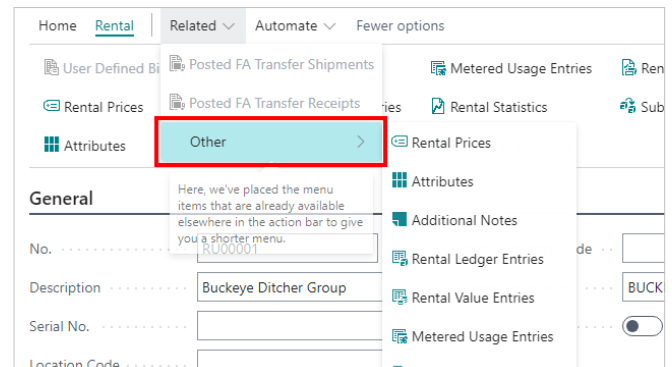


To learn about the Rental FA Transfer Journal, see the ODT Rental Online help, Additional Rental Processes, Rental FA Transfer Journal.

To learn about returning a Rental Unit linked to a Fixed Asset, to a different or temporary location, see ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Return a Rental Unit to a Different or Temporary Location.

Click on the button **Other**

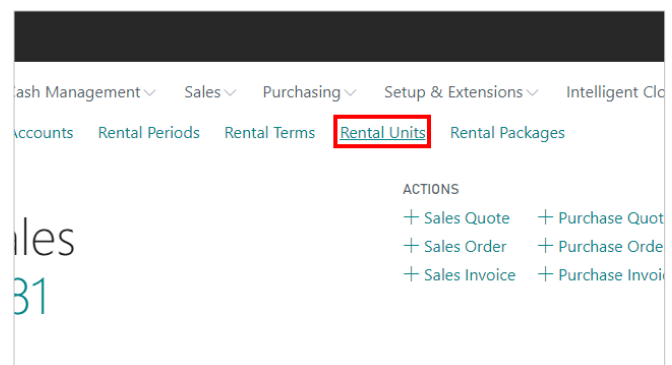
The Other menu option includes all the menu options that are located within the Rental menu.



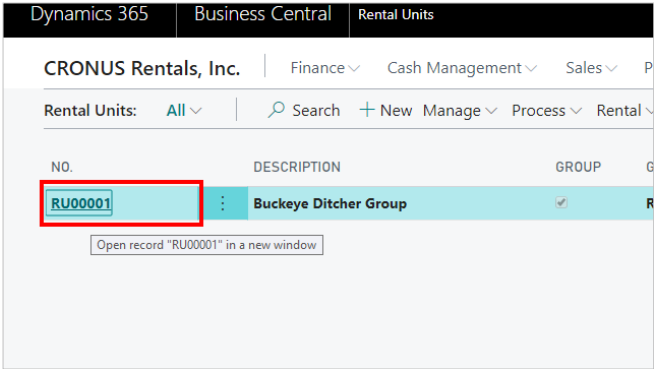
2.8.1.4. How to Add a Picture to a Rental Unit

This process is done either during or after the creation of a Rental Unit.

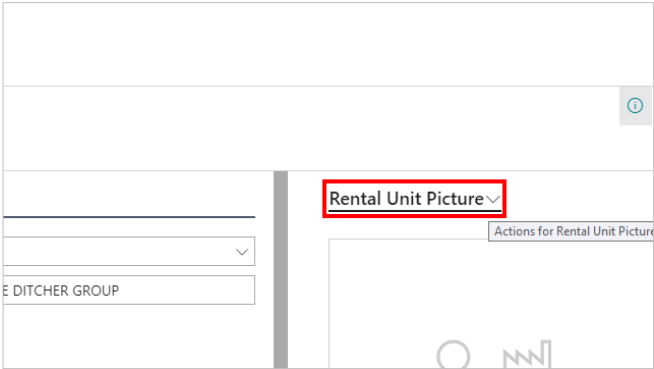
Click on the navigation menu item **Rental Units**



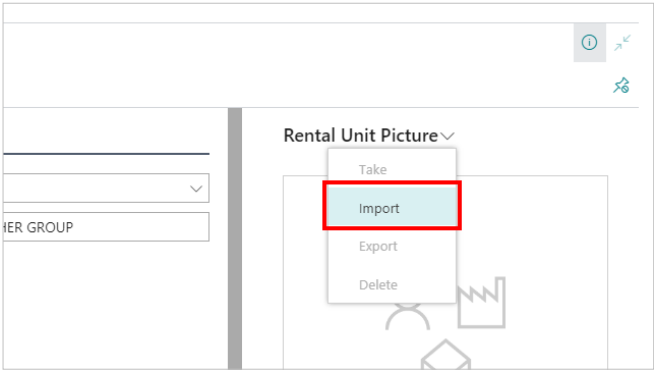
Click on the link in cell **No.** with the value **RU00001**



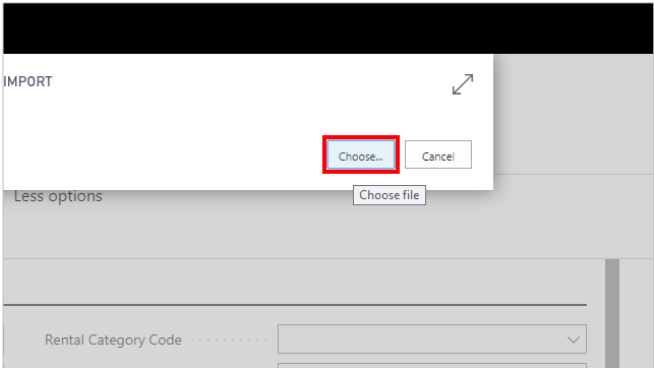
Click on the link **Rental Unit Picture**



Click on the menu item **Import**



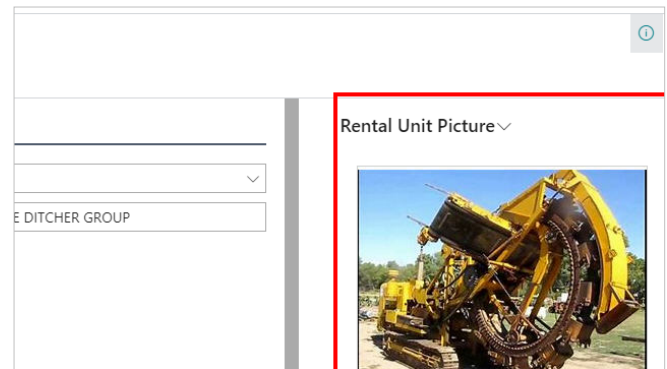
Click on the field **Choose**



Browse to where the picture is located, select the file, and then select Open.

Click on **Rental Unit Picture**

The picture will be imported in and display at the right side of the unit card.



NOTE:

Should your organization not wish to attach pictures and would prefer that the section for pictures not show on the card, then the user can click on the Collapse Fact box icon that is above the "Pin" icon.

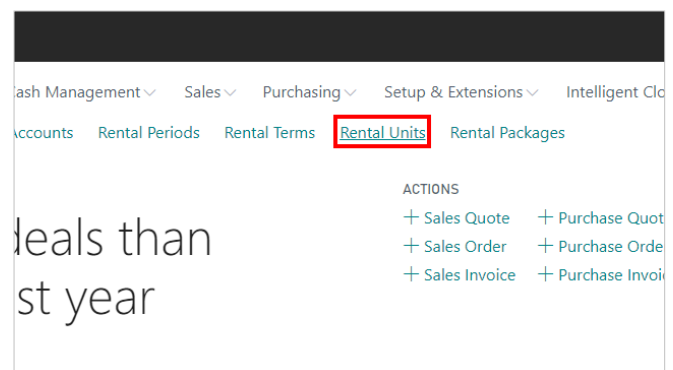
2.8.2. How to Set Up a Rental Unit Group

Profile - Business Manager

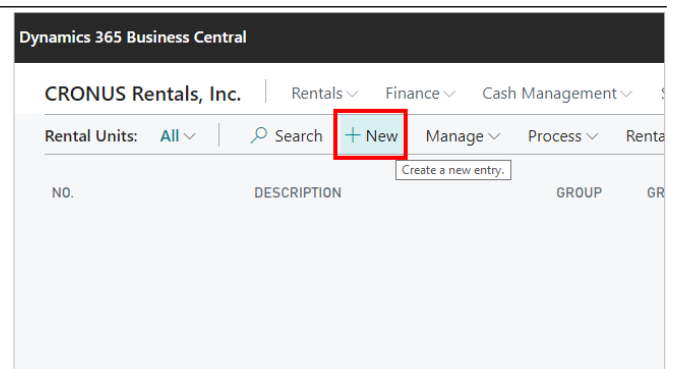
The setup of Rental Units can as well be setup using the Sales Order Processor profile when the user has the appropriate Permission Sets assigned.

2.8.2.1. How to Set Up a Rental Unit Group

Click on the navigation menu item **Rental Units**



Click on the link **New**





ODT Rentals Online Help

Click on the field **No.**

Entries	Entries	Excel
Rental		Page
ard		
<div></div>		
<div></div>		
<div></div>		

Press the **Enter** key.

Should your organization be using manually assigned rental unit nos., then enter the no. to be used for this rental unit group.

Entries	Entries	Excel
Rental		Page
ard		
<div></div>		
<div></div>		
<div></div>		

Click on the field **Description**

RU00001		
<div></div>		
<div></div>		
<div></div>		

Enter the text **Buckeye Ditcher Group.**

RU00001		
Buckeye Ditcher Gr		
<div></div>		
<div></div>		



ODT Rentals Online Help

Click on the field **Location Code**

The Location Code is optional on a rental unit group.

Should the units to be linked to the group be for a variety of locations, then leave this field blank on the rental unit group.

The screenshot shows a form with a field labeled "Location Code" which is highlighted with a red rectangle. Above it is a "Serial No." field. Below it is a "Posting" section with "Gen. Prod. Posting Group" and "Tax Group Code" fields. Further down is a "Rental" section with a "Group" field.

Click on the field **Gen. Prod. Posting Group, (Blank)**

The screenshot shows a form with a "Location Code" field at the top. Below it is a "Posting" section. The "Gen. Prod. Posting Group" field in the Posting section is highlighted with a red rectangle. Below it is the "Tax Group Code" field. Further down is a "Rental" section with a "Group" field.

Click on **Code = RETAIL, Description = Retail**

Select the General Product Posting Group that applies to this rental group and contains the applicable Rental G/L Accounts on the General Posting Setup.

The screenshot shows a form with a "Location Code" field at the top. Below it is a "Posting" section. The "Gen. Prod. Posting Group" field in the Posting section is highlighted with a red rectangle, and a dropdown menu is open showing the "RETAIL" option. Below it is the "Tax Group Code" field. Further down is a "Rental" section with a "Group" field.

Click on the field **Tax Group Code, (Blank)**

The screenshot shows a form with a "Location Code" field at the top. Below it is a "Posting" section. The "Gen. Prod. Posting Group" field is set to "RETAIL". The "Tax Group Code" field in the Posting section is highlighted with a red rectangle. Further down is a "Rental" section with a "Group" field.



ODT Rentals Online Help

Click on **Code = SUPPLIES**, **Description = Taxable Olympic Supplies**

Click on the Tax Group Code that is to be used to calculate and post sales tax when renting this unit.

	CODE	DESCRIPTION
Rental	FURNITURE	Taxable Olympic Fu
Group	LABOR	Labor on Job
Group No.	MATERIALS	Taxable Raw Mater
Sub Rental	NONTAXABLE	Nontaxable
Allow Overbooking	SUPPLIES	Taxable Olympic Su
Rental Terms Code	+ New Select record "SUPPLIES"	
Minimum Rental Duration		
Group Qty.	0	

Click on **Group, No**

Click on Group box to set the field to Yes, which will specify this unit is a rental unit group.

The Group No. field will automatically be populated with this Unit No.

Gen. Prod. Posting Group	RETAIL
Tax Group Code	SUPPLIES
Rental	
Group	<input checked="" type="checkbox"/>
Group No.	...
Sub Rental	<input type="checkbox"/>
Allow Overbooking	<input type="checkbox"/>
Rental Terms Code	

Click on **Allow Overbooking, No**

If overbooking against the group is to be allowed, then clicking on this field will set it to Yes. Otherwise leave this field as is.

Rental	
Group	<input checked="" type="checkbox"/>
Group No.	RU00001
Sub Rental	<input type="checkbox"/>
Allow Overbooking	<input checked="" type="checkbox"/>
Rental Terms Code	
Minimum Rental Duration	
Group Qty.	0
Group Quote Qty.	0.00

Click on the field **Rental Terms Code, (Blank)**

Group	<input checked="" type="checkbox"/>
Group No.	RU00001
Sub Rental	<input type="checkbox"/>
Allow Overbooking	<input checked="" type="checkbox"/>
Rental Terms Code	
Minimum Rental Duration	
Group Qty.	0
Group Quote Qty.	0.00



ODT Rentals Online Help

Click on **Code = MONTH-PEND**

Select the Rental Term that is most used with this rental unit group.

Gen. Prod. Posting Group RETAIL

Tax Group Code SUPPLIES

Rental	CODE	DESCRIPTION
	MONTH-END-OPT...	Monthly Rental for C
Group	MONTH-PEND	Monthly Rental - Per
Group No.	MONTH-SELECT	Select record "MONTH-PEND" Monthly Rental - Ear
Sub Rental	MONTH-PSTART	Monthly Rental - Per
Allow Overbooking	MONTH-PSTART-EA...	Monthly Rental - Ear
Rental Terms Code	+ New	

Click on the field **Minimum Rental Duration**

☒

RU00001

☐

☒

MONTH-PEND

0.0

Enter the text **1 day**.

In this example, the Minimum Rental Duration is 1 day.

If your organization track rentals based on both date and time, then enter either 1 minute or 1 second in this Minimum Rental Duration field.

☒

RU00001

☐

☒

MONTH-PEND

1 d

0.0

Click on the field **Availability Warning**

0.00

0.00

No

No

0

0, (Alt+Up) Show to

Enter the text 1.

Enter the applicable quantity.

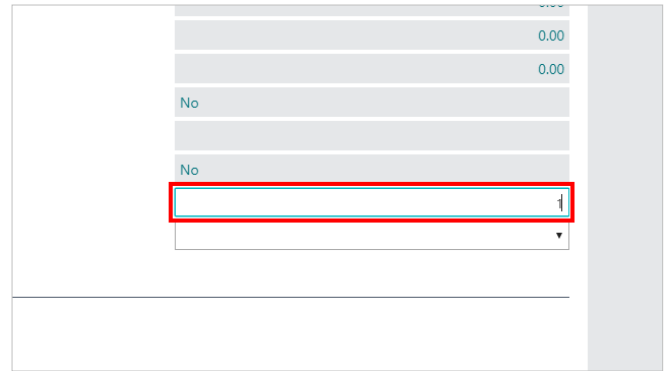
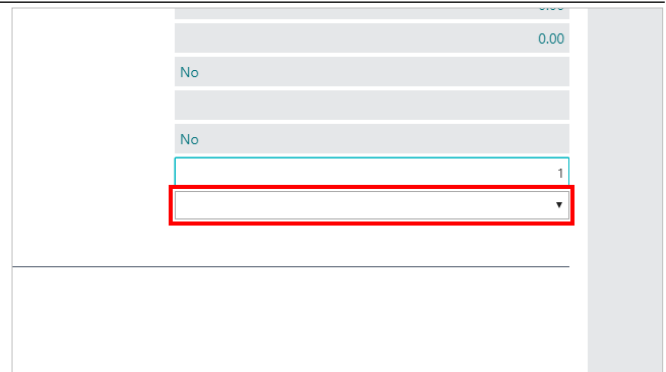
The Availability Warning field is used to specify at what availability of the units in the group that a warning color is displayed on the Group Availability Matrix.

For information on the Group Availability Matrix, please review the help document, Processing Rentals Overview - Group Availability Matrix Overview.

Click on the field **Service Status**

The Service Status field is not used with a group unit and is only to be used on units that are either assigned to a group or not assigned to a group.

For information on this field, please see the ODT Rentals Online Help, Setup Rentals, Rental Units Overview.

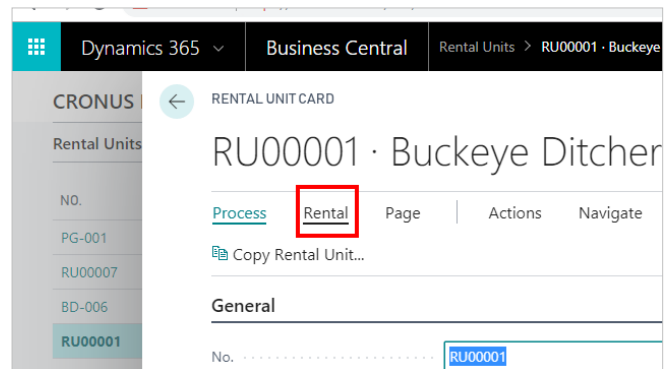



The following demonstrates the setup of Dimensions on a Rental Unit Group.

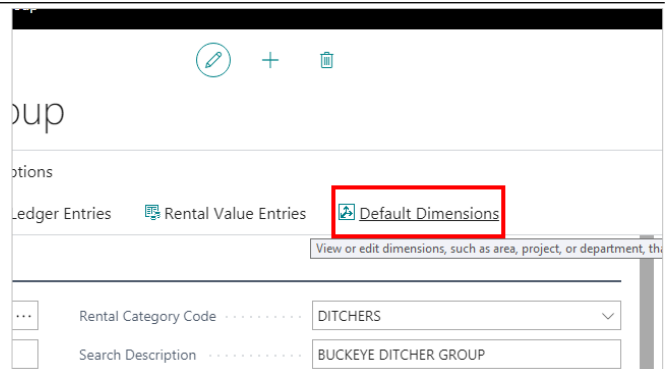
When units are assigned to a group, the Dimensions setup on the group will automatically be assigned to the units.

The same steps apply to adding Dimensions to any Rental Unit that is not assigned to a group.

Click on the navigation menu item popup **Rental**

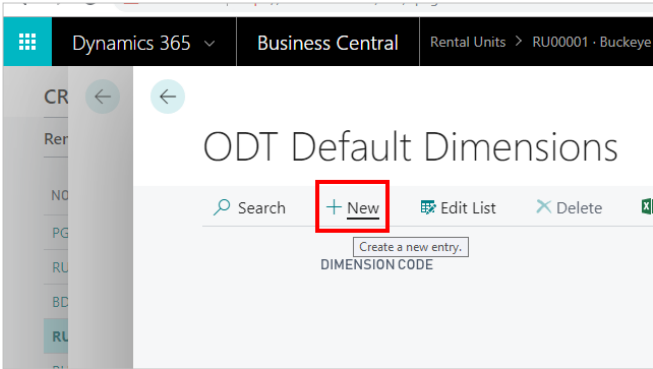


Click on the navigation menu item **Default Dimensions**

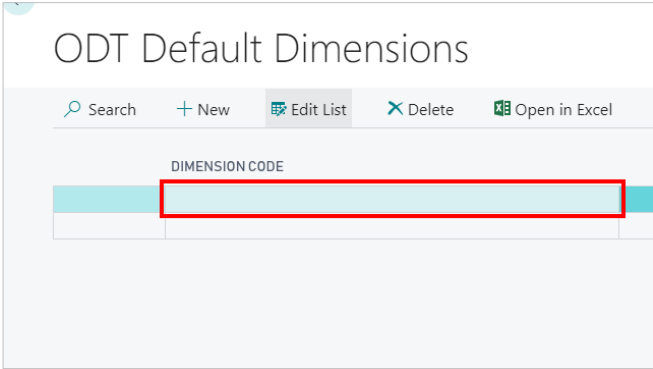




Click on the navigation menu item **New**

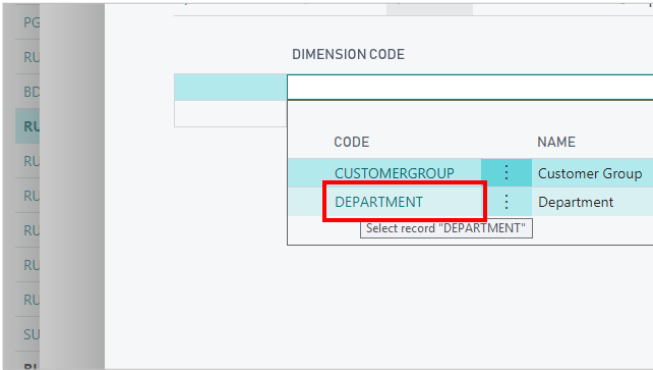


Click on the cell **Dimension Code**

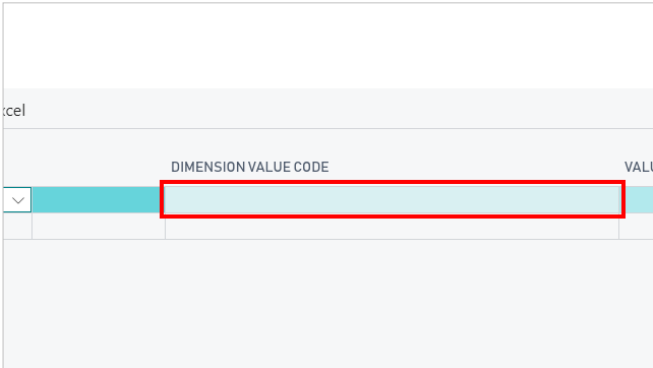


Click on **Code = DEPARTMENT, Name = Department, Blocked = 0**

Select the applicable Dimension Code to be assigned to the Rental Unit group.

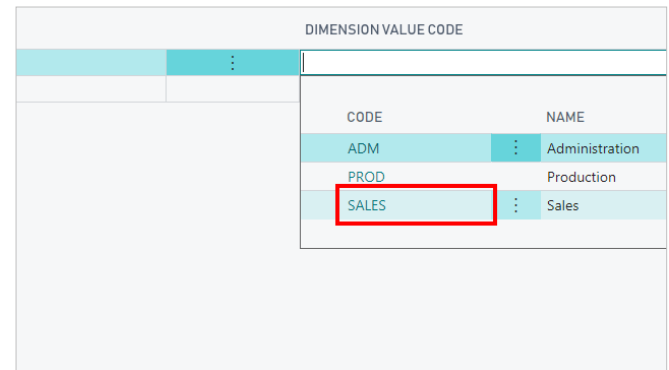


Click on the cell **Dimension Value Code**



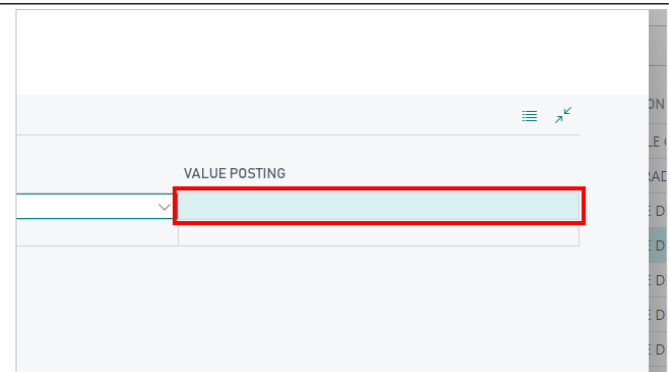
Click on **Code = SALES, Name = Sales**

Select the applicable Dimension Value to have the value default to the rental documents, quote and contract.



CODE	NAME
ADM	Administration
PROD	Production
SALES	Sales

Click on the cell **Value Posting**



VALUE POSTING

Code Mandatory

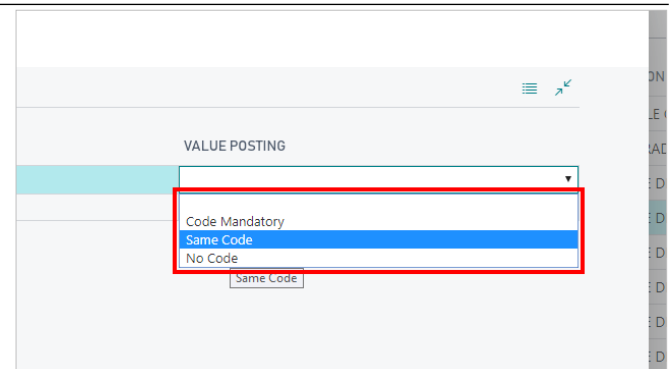
Same Code

No Code

Click on the item **Same Code** in the list

Select the desired setting.

Review Dynamics 365 Business Central help on Setting up Default Dimensions for Customers, Vendors and Other accounts, before selecting an option other than, blank.



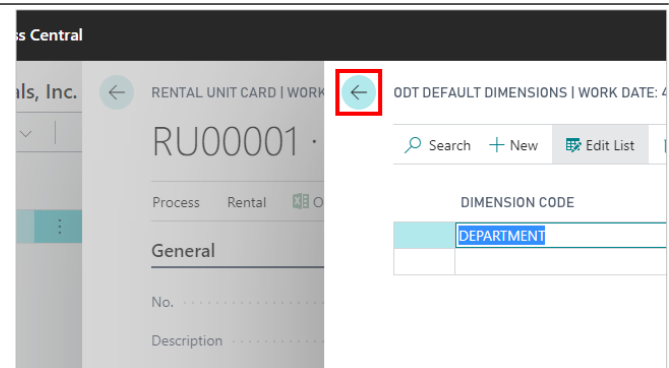
VALUE POSTING

Code Mandatory

Same Code

No Code

Click on the back button



RENTAL UNIT CARD | WORK

ODT DEFAULT DIMENSIONS | WORK DATE: 4

RU00001

Process Rental

General

No.

Description

DIMENSION CODE

DEPARTMENT

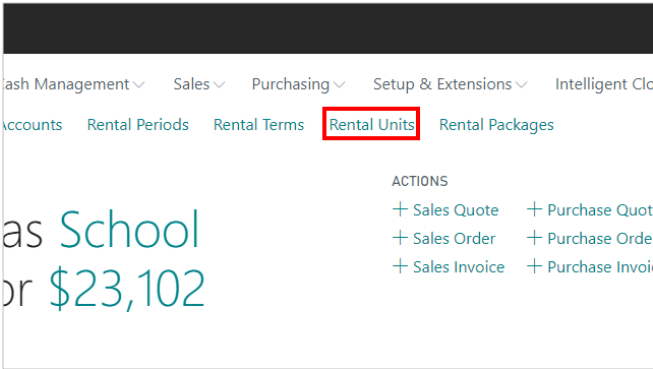
2.8.3. How to Set Up a Rental Unit and Link to a Rental Unit Group

Profile - Business Manager

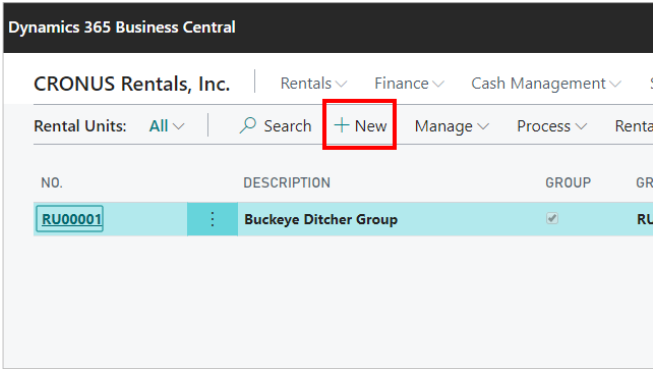
The setup of Rental Units can as well be setup using the Sales Order Processor profile should the user have the appropriate Permission Sets.



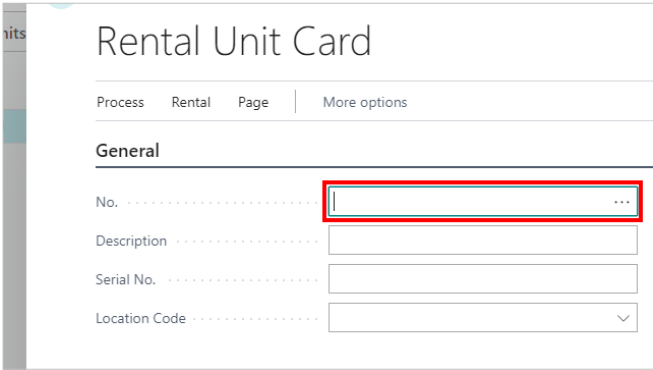
Click on the navigation menu item **Rental Units**



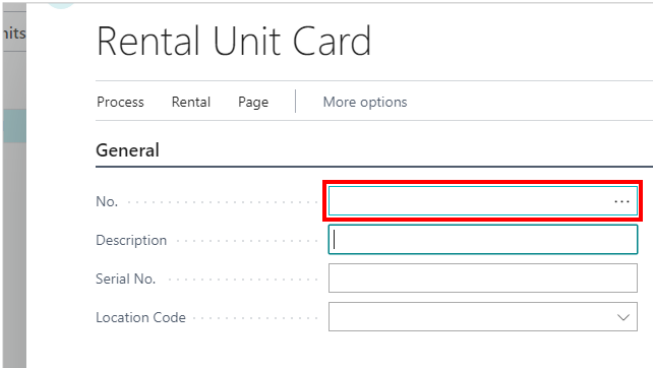
Click on the link **New**



Click on the field **No.**



Press the **Enter** key.
Should your organization be using manually assigned rental unit nos., then enter the No. to be used for this rental unit group.





Enter the text **Buckeye Ditcher**.

Dynamics 365 Business Central

CRONUS | RENTAL UNIT CARD | WORK DATE: 4/8/2019

Rental Units

RU000002

Process Rental Page More options

General

No. RU00002

Description Buckeye Ditcher

Click on the field **Serial No.**

Process Rental Page More options

General

No. RU00002

Description Buckeye Ditcher

Serial No.

Location Code

Posting

Enter **Serial No.**

Process Rental Page More options

General

No. RU00002

Description Buckeye Ditcher

Serial No. B

Location Code

Posting

Click on the field **Location Code**

General

No. RU00002

Description Buckeye Ditcher

Serial No. BD-002

Location Code

Posting

Gen. Prod. Posting Group

Tax Group Code



ODT Rentals Online Help

Click on **Code = EAST, Name = East Warehouse**

Should your organization be using Locations, look up and select the location from which the unit is rented from.

NOTE:
If on Rental Management Setup the field, Location Mandatory has been set to Yes, then a location must be specified on the rental units which are not a rental unit group.

Description Buckeye Ditcher

Serial No. BD-002

Location Code

Posting

Gen. Prod. Posting Group

Tax Group Code

CODE

NAME

EASTEast Warehouse

RESelect record "EAST"Inventory Items Rental Res

WESTWest Warehouse

+ New

Rental

Click on the field **Gen. Prod. Posting Group**

Serial No. BD-002

Location Code EAST

Posting

Gen. Prod. Posting Group

Tax Group Code

Rental

Click on **Code = RETAIL, Description = Retail**

Posting

Gen. Prod. Posting Group

Tax Group Code

CODE

DESCRIPTION

NO TAXMiscellaneous without tax

RETAILRetail

SESelect record "RETAIL"Resources, etc.

+ New

Rental

Group

Group No.

Sub Rental

Allow Overbooking

Click on the field **Tax Group Code**

Location Code EAST

Posting

Gen. Prod. Posting Group RETAIL

Tax Group Code

Rental

Group

Group No.



ODT Rentals Online Help

Click on **Code = SUPPLIES**, Description = **Taxable Olympic Supplies**

	CODE	DESCRIPTION
Rental	FURNITURE	Taxable Olympic Furniture
Group	LABOR	Labor on Job
Group No.	MATERIALS	Taxable Raw Materials
Sub Rental	NONTAXABLE	Nontaxable
Allow Overbooking	SUPPLIES	Taxable Olympic Supplies
Rental Terms Code	+ New | Select record "SUPPLIES"	
Minimum Rental Duration		
Group Qty.	0	

Click on the field **Group No.**

Tax Group Code	SUPPLIES
Rental	
Group	<input type="checkbox"/>
Group No.	<input type="text"/>
Sub Rental	<input type="checkbox"/>
Allow Overbooking	<input type="checkbox"/>
Rental Terms Code	
Minimum Rental Duration	

Click on the lookup button **Look up value**

SUPPLIES	
<input type="checkbox"/>	Group Qty. To Rent
<input type="text"/>	Group Qty. On Rent
<input type="checkbox"/>	Look up value Qty. To Return
<input type="checkbox"/>	On Rent
<input type="text"/>	On Rent Doc. No.
<input type="text"/>	Reservations Exist

Click on the link in cell **No.** with the value **RU00001**

Select the rental unit group this unit is to be linked to.

RENTAL UNIT CARD | WORK DATE: 4/8/2019		Search Rental	Open in Excel
RU00002 · Buckeye		RENTAL UNIT LIST	
Process	Rental	Page	More opt
General			
No.	RU0000		
Description	Buckeye		
Serial No.	BD-002		

NO.	DESCRIPTION
RU00001	Buckeye Ditcher Group
Select record "RU00001"	

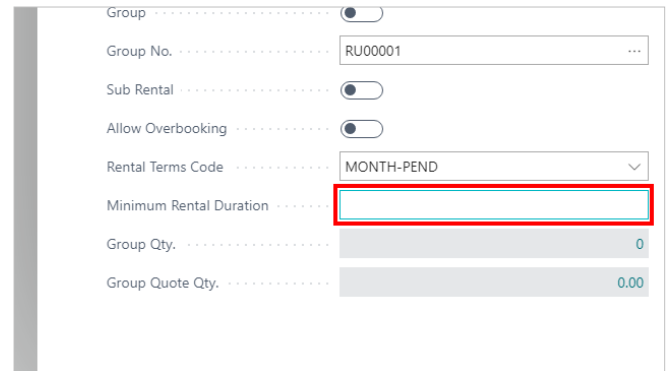
ODT Rentals Online Help

Click on the field **Minimum Rental Duration**

In this example, the Minimum Rental Duration is 1 day.

If your organization track rentals based on both date and time, then enter either 1 minute or 1 second in this Minimum Rental Duration field.

The duration on a unit being linked to a group must have the same setting as the group.



Group ☐

Group No. RU00001

Sub Rental ☐

Allow Overbooking ☐

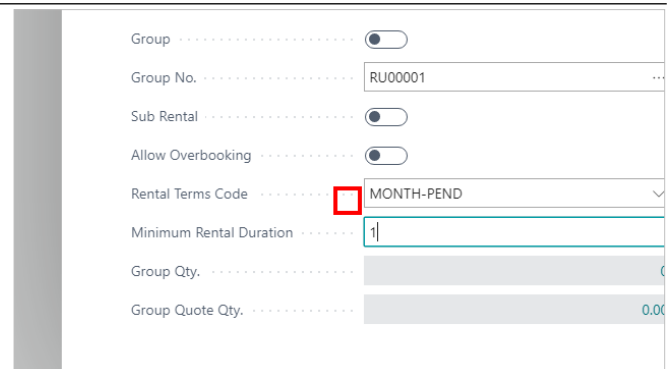
Rental Terms Code MONTH-PEND

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Enter **Minimum Rental Duration**.



Group ☐

Group No. RU00001

Sub Rental ☐

Allow Overbooking ☐

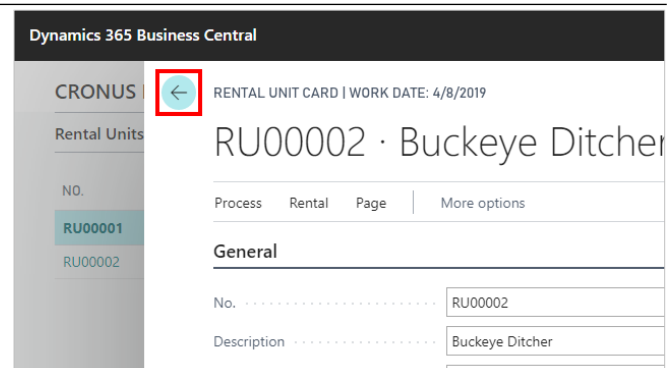
Rental Terms Code MONTH-PEND

Minimum Rental Duration 1

Group Qty. 0

Group Quote Qty. 0.00

Click on the back button



Dynamics 365 Business Central

CRONUS | RENTAL UNIT CARD | WORK DATE: 4/8/2019

Rental Units

RU00001

RU00002

RU00002 · Buckeye Ditcher

Process Rental Page | More options

General

No. RU00002

Description Buckeye Ditcher

2.8.4. How to Link a Rental Unit to a Master Record

2.8.4.1. Overview

Rental Units can be linked to existing Fixed Assets, Resources or G/L Accounts for informational purposes only at this time.

When linked to a Fixed Asset, and on Rental Management Setup, the Location Mandatory and Rental FA Transfer Mandatory are enabled, then when Location code on the Rental Unit is changed, then the Fixed Asset, Rental Location will be automatically updated to the same Location and visa versa.

The Rental FA Transfer Journal provides the ability to transfer both the Fixed Asset and Rental Unit to a different location, creating a Rental FA Transfer Shipment and a Rental FA Transfer Receipt. If the unit is returned to a different or temporary location a Rental FA Transfer Journal is automatically created and posted, ensuring that both the unit and asset have the same rental location.

To learn about the Rental FA Transfer Journal, see ODT Rental Online Help, Additional Rental Processes, Rental FA Transfer Journal.

When Rental Units are linked to an Inventory Item, then the Rental Unit card will not have a Location specified, even when Rental Management Setup has the Location Mandatory field checked. Inventory Locations functionality handles the use of Locations in conjunction with the Rental Unit linked to an Item.



For additional information on setups for units linked to items, please review the help, Setup Rentals - Setup Rental Locations.

When Link Type is set on a Rental Unit Group the units assigned to the group will be updated with the same Link Type. Rental Units assigned to a group cannot have a different Link Type when the group has a Link Type specified.

To update unit groups and units assigned:

- If the Rental Unit Group card has a link type set, clear the link type setting it to blank and then re-select the link type
- If the Rental Unit Group card does not have a link type, yet the assigned units do, then select the Link Type on the group card.

Suggested steps to use, if a current assigned unit(s) have a different Link Type than the group:

- Remove link type and code on assigned unit.
- Remove Group No on unit assigned to group.
- Add to a new or other group that has the same Link Type and the assigned units are similar.

NOTE

Once a unit that has a Link Code specified, and the unit is on a Rental Quote or Rental Contract, then the Link Code cannot be changed. The unit will need to be deleted from the Rental Line, the Link Code revised and the unit re-entered on the Rental Line.

Once a unit has had transactions posted to it, then the Link Code cannot be changed at all.

Dimensions:

When units are linked to other Master cards such as, Items, Resources, Fixed Assets or G/L Accounts, the Dimensions from the master records can be automatically applied to the units.

If Dimensions have been setup on the unit and then the Link code is selected, a pop-up will ask if you want to transfer the Dimensions from the selected master records. If Yes is selected, then the dimension configuration on the master card being linked to will be automatically setup on the rental unit.

If you remove a link, and there are dimensions that are the same on the units as the linked master card, then a pop-up will ask if you want to remove those ones. If Yes is selected, then the dimensions and values that are the same will be removed from the rental unit. If No is selected, then the dimensions and values will remain on the unit.

NOTE:

Units linked to master records can still have different Dimension Values than the linked record.

2.8.4.2. Steps to Link a Rental Unit to a Master Record

Profile - Business Manager

Rental Units can as well be modified using the Sales Order Processor profile.

This example demonstrates linking a Rental Unit to a Fixed Asset.



ODT Rentals Online Help

Click on the navigation menu item **Rental Units**

Cash Management ▾Sales ▾Purchasing ▾Setup & Extensions ▾Intelligent Clo

AccountsRental PeriodsRental TermsRental UnitsRental Packages

as School
or \$23,102

ACTIONS
+ Sales Quote + Purchase Quot
+ Sales Order + Purchase Orde
+ Sales Invoice + Purchase Invoi

Click on the link in cell **No.** with the value **RU00002**
Select the Rental Unit that you wish to link to a Fixed Asset.

CRONUS Rentals, Inc. | Rentals ▾Finance ▾Cash Management ▾

Rental Units: All ▾ | 🔍 Search + New Manage ▾Process ▾Ren

NO.	DESCRIPTION	GROUP	G
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	R
RU00002	Buckeye Ditcher	<input type="checkbox"/>	R

Open record "RU00002" in a new window

Click on the field **Link Type**

MONTH-PEND

1 day

Click on the item **Fixed Asset** in the list

Select the type of master record that the Rental Unit is to be linked to.

MONTH-PEND

1 day

Item

Fixed Asset

Resource

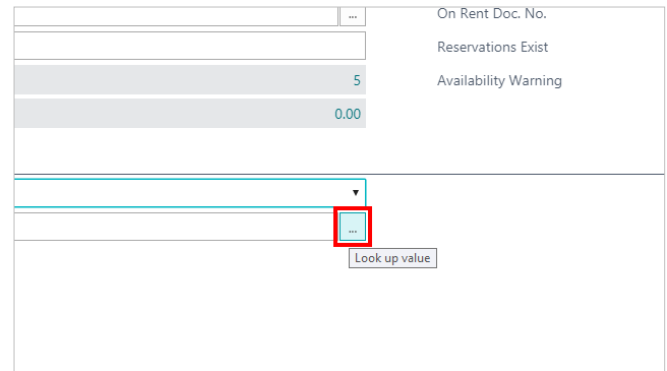
G/L Account

Fixed Asset

Click on the lookup button **Link Code**

The list that is displayed is filtered to display only the master records based on the selection in the Link Type field.

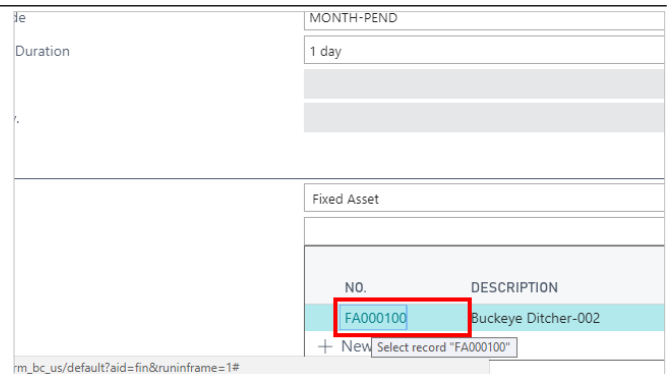
In this example, as Fixed Asset was selected, then the listing displays only Fixed Assets.



The screenshot shows a form with a dropdown menu and a 'Look up value' button. The dropdown menu is currently set to 'Fixed Asset'. The 'Look up value' button is highlighted with a red box.

Click on **No. = FA000100**

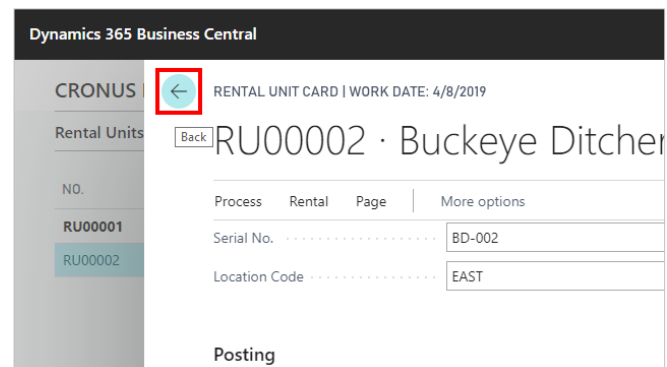
Select the Fixed Asset that you wish to link the Rental Unit to.



The screenshot shows a table of Fixed Assets. The row for 'FA000100' is highlighted with a red box. The table has columns for 'NO.' and 'DESCRIPTION'. The 'DESCRIPTION' for 'FA000100' is 'Buckeye Ditcher-002'.

When a Rental Unit is linked to a Fixed Asset, the Rental Unit No. will be displayed on the Fixed Asset card, on the Rentals tab.

Click on the back button



The screenshot shows the Dynamics 365 Business Central interface. A 'Back' button is highlighted with a red box. The interface displays a 'RENTAL UNIT CARD' for 'RU00002 · Buckeye Ditcher'.

2.8.5. How to Set Up Dimensions on Rental Units

2.8.5.1. Overview

Rentals provides for the use of Dimensions on Rental Units, Rental Quotes and Rental Contracts similar to using Dimensions on Items, Sales Quotes and Sales Contracts.

This provides organizations flexibility in assigning Dimension Values. When Dimension Codes and Values are assigned to a Rental Unit Group, then the units assigned to the group will automatically be assigned the same codes and values.

In the processing of contracts the Dimension Codes and Values are posted to all applicable entries the same as in processing a Sales Order or Sales Invoice.

Rental Units Linked to Master Cards:

When units are being linked to other Master cards such as, Items, Resources, Fixed Assets or G/L Accounts, the Dimensions from the master records can be automatically applied to the units.

If Dimensions have been setup on the unit and then the Link code is selected, a pop-up will ask if you want to

transfer the Dimensions from the selected master records. If Yes is selected, then the dimension configuration on the master card being linked to will be automatically setup on the rental unit.

If you remove a link, and there are dimensions that are the same on the units as the linked master card, then a pop-up will ask if you want to remove those ones.

If Yes is selected, then the dimensions and values that are the same will be removed from the rental unit. If No is selected, then the dimensions and values will remain on the unit.

NOTE:

Units linked to master records can still have different Dimension Values than the linked record.

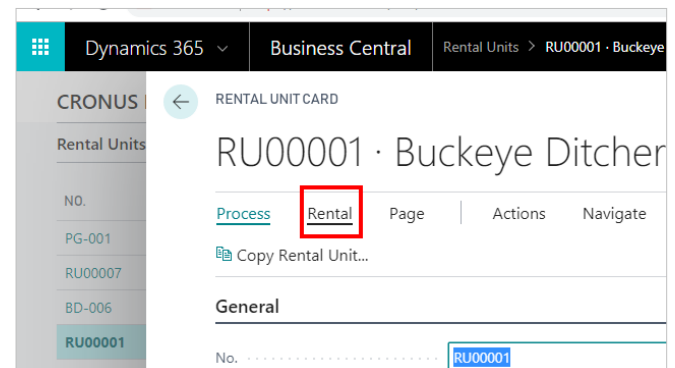
2.8.5.2. How to Add Dimensions to a Rental Unit

The following demonstrates the setup of Dimensions on a Rental Unit Group.

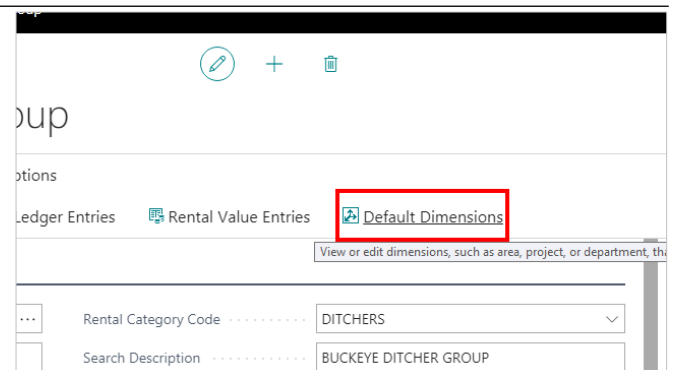
When units are assigned to a group, the Dimensions setup on the group will automatically be assigned to the units.

The same steps apply to adding Dimensions to any Rental Unit that is not assigned to a group.

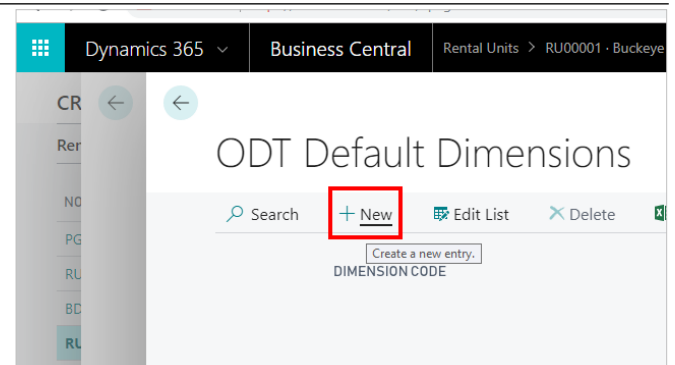
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Default Dimensions**



Click on the navigation menu item **New**



Click on the cell **Dimension Code**

ODT Default Dimensions

Search + New Edit List Delete Open in Excel

DIMENSION CODE	

Click on **Code = DEPARTMENT, Name = Department, Blocked = 0**

Select the applicable Dimension Code to be assigned to the Rental Unit group.

PG
RU
BD
RU
RU
RU
RU
RU
SU
RU

DIMENSION CODE

CODE	NAME
CUSTOMERGROUP	Customer Group
DEPARTMENT	Department

Select record "DEPARTMENT"

Click on the cell **Dimension Value Code**

cel

DIMENSION VALUE CODE		VALU

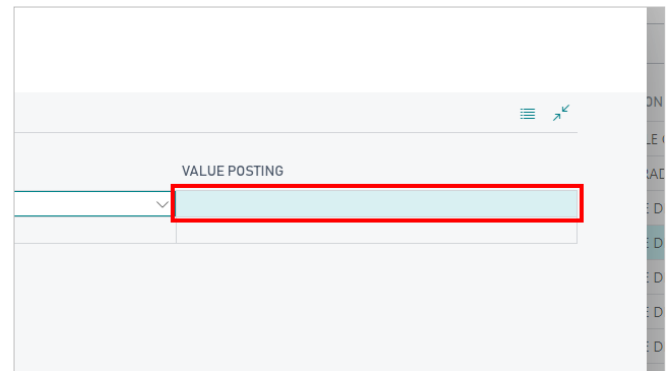
Click on **Code = SALES, Name = Sales**

Select the applicable Dimension Value to have the value default to the rental documents, quote and contract.

DIMENSION VALUE CODE

CODE	NAME
ADM	Administration
PROD	Production
SALES	Sales

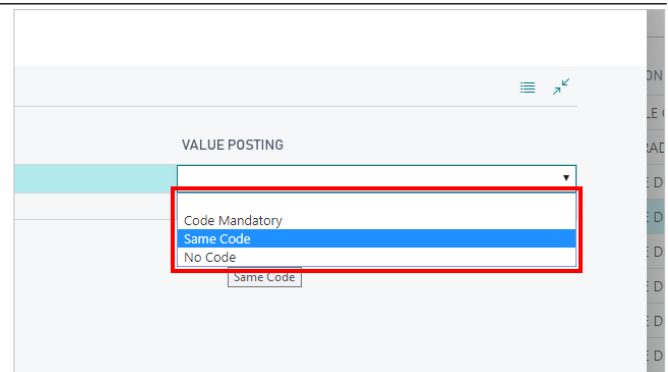
Click on the cell **Value Posting**



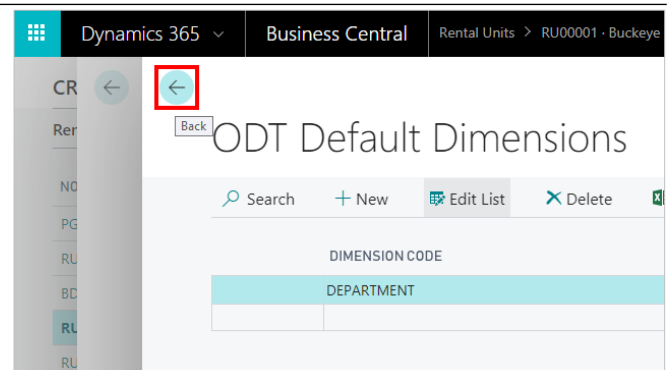
Click on the item **Same Code** in the list

Select the desired setting.

Review Dynamics 365 Business Central help on Setting up Default Dimensions for Customers, Vendors and Other accounts, before selecting an option other than, blank.



Click on the back button



2.8.6. How to Attach Documents, Links and Notes to Rental Units

2.8.6.1. Overview

Links, Notes and Attachments can be added to Rental Unit Groups, Rental Units and Rental Packages, in the fact box on the right, in the same manner in which they can be added to Items.

The fact box contains the Attachments and Notes by default. The Links must be added using Personalize.

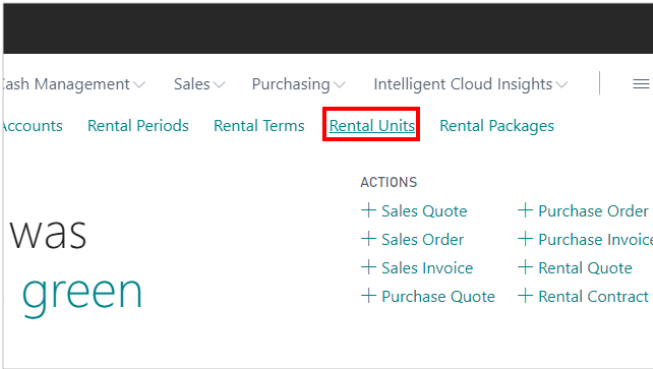
Similar to the Item card attachment of files contains the ability to specify that the documents are to flow through to the rental transactions.

2.8.6.2. How to Attach a Document to a Rental Unit

The following example demonstrates how to attach a document to a Rental Unit.



Click on the navigation menu item **Rental Units**



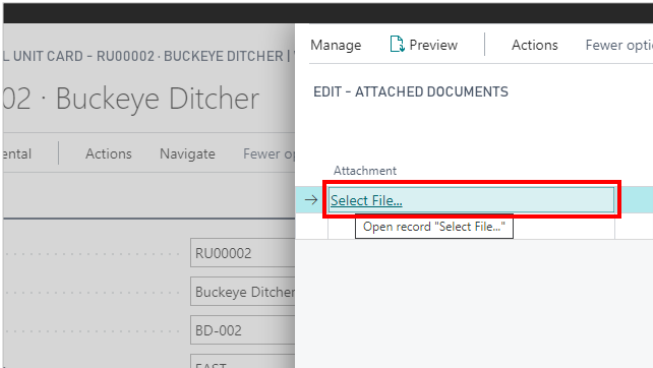
Click on the link in cell **No.** with the value **RU00002**

No. ↑	Description	Group ↑	Group
PG-001	Portable Generators	<input type="checkbox"/>	
RU00007	165 G Brad Nailer	<input type="checkbox"/>	
BD-006	Buckeye Ditcher	<input type="checkbox"/>	RU00
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU00
RU00002	Buckeye Ditcher	<input type="checkbox"/>	RU00
RU00003	Buckeye Ditcher	<input type="checkbox"/>	RU00
RU00004	Buckeye Ditcher	<input type="checkbox"/>	RU00
RU00005	Buckeye Ditcher	<input type="checkbox"/>	RU00
RU00006	Buckeye Ditcher	<input type="checkbox"/>	RU00

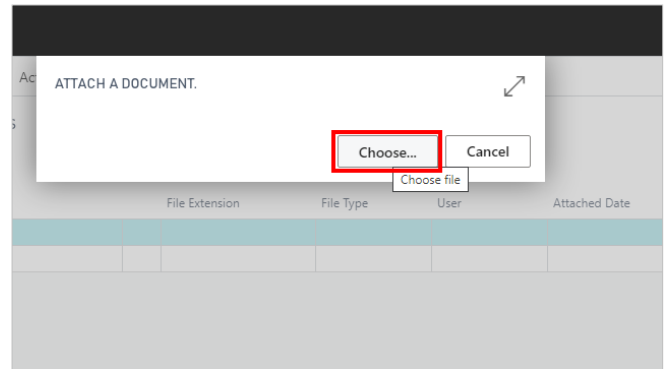
Click on the field **Documents**



Click on the link in cell **Attachment** with the value **Select File...**



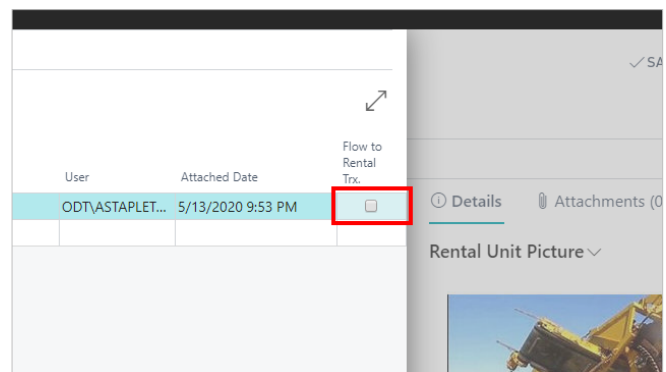
Click on the field **null**



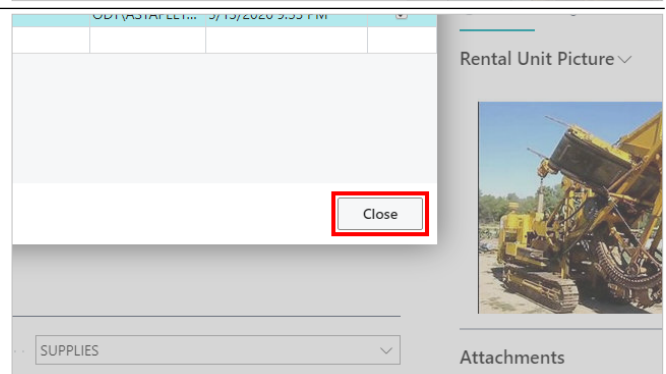
Browse to where the file to be attached is located, select the file, and then select Open.

Click on **Flow to Rental Trx.**

If the file is to flow through to the Rental Lines on a quote or contract, then check the box.



Click on the button **Close**

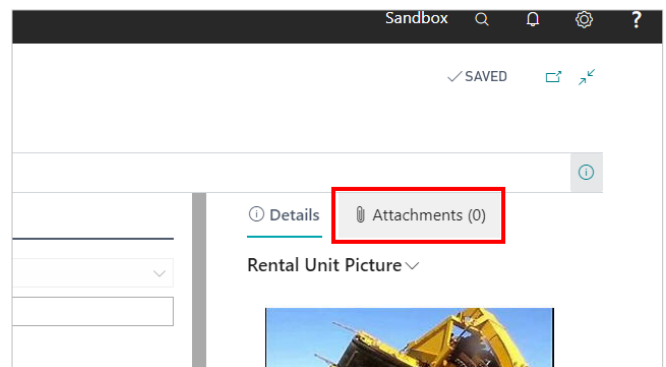


2.8.6.3. How to Add a Note to a Rental Unit

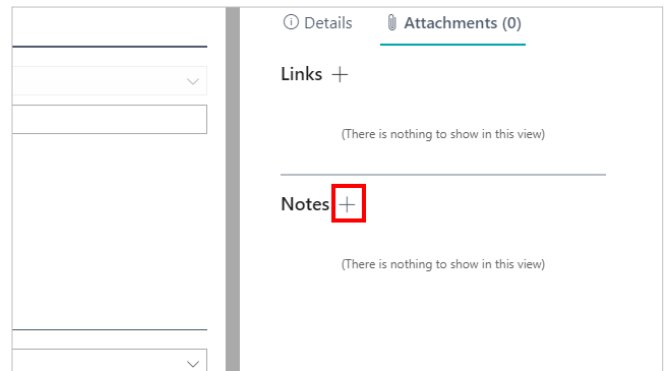
The following example demonstrates how to add a Note to a Rental Unit.

Notes do not flow through to any rental documents.

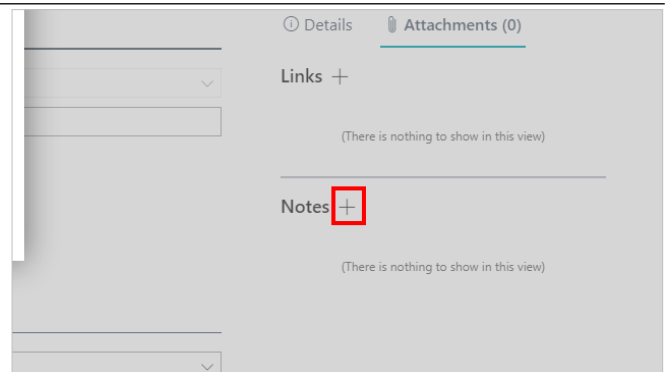
Click on the button ☐ **Attachments (0)**



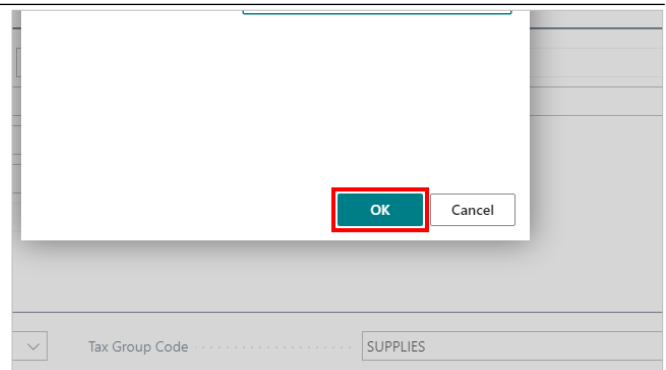
Click on the link **New**



Enter the text **On return from rental, a maintenance inspection is to be performed.**



Click on the button **OK**

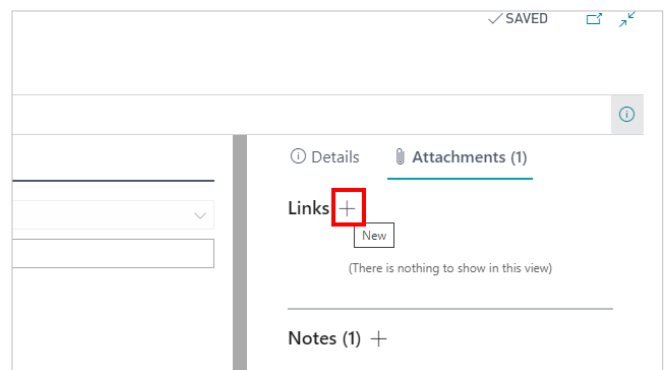


2.8.6.4. How to Add a Link to a Rental Unit

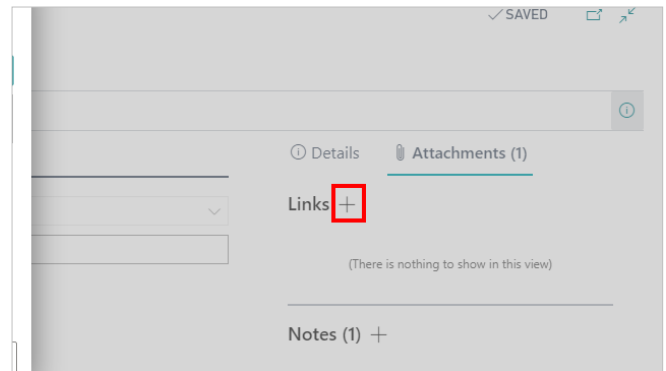
The following example demonstrates how to add a Link to a Rental Unit.

Links do not flow through to any rental documents.

Click on the link **New**



Enter the text **https://www.opendoorerp.com**.



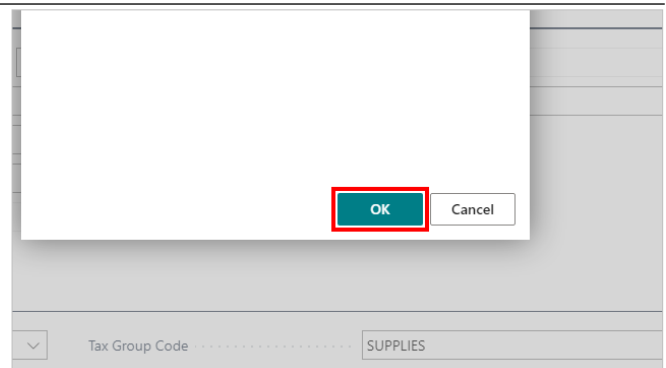
Click on the textarea **Description**



Enter the text **Open Door Technology website**.



Click on the button **OK**



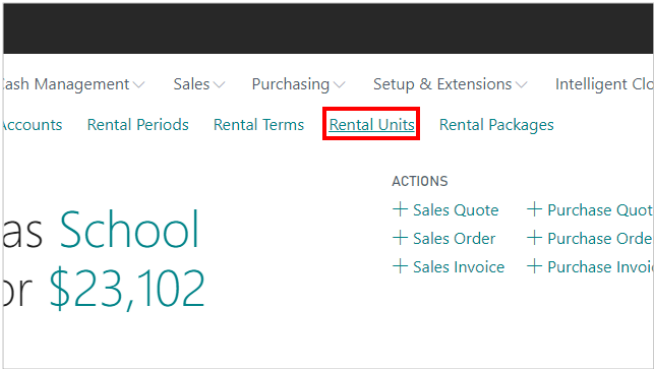
2.8.7. How to Copy a Rental Unit Using the No. Series

Profile - Business Manager

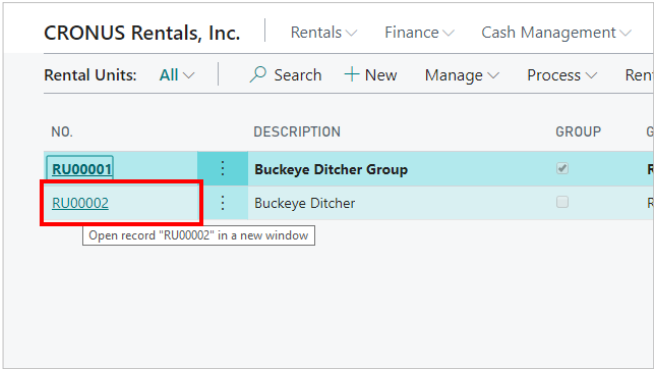
Rental Units can as well be setup using the Sales Order Processor profile, when the user has the appropriate Permission Sets.



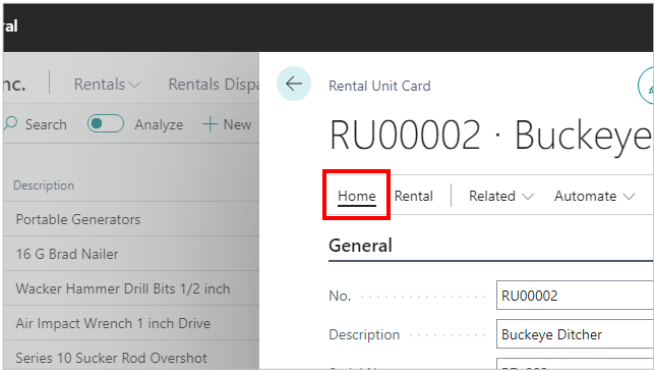
Click on the navigation menu item **Rental Units**



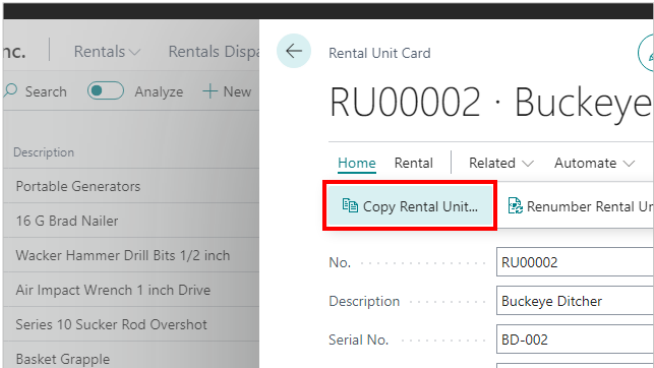
Click on the link in cell **No.** with the value **RU00002**



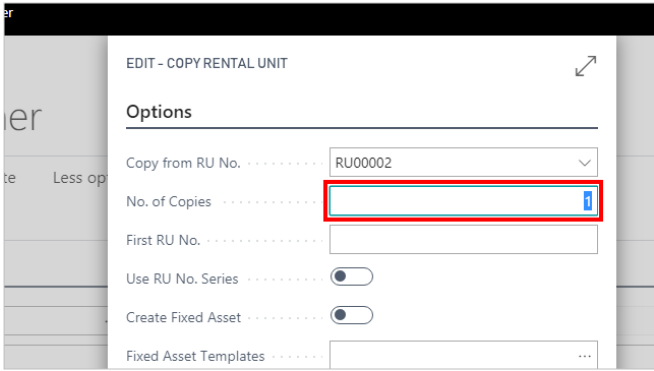
Click on the navigation menu item popup **Home**



Click on the navigation menu item **Copy Rental Unit...**



Click on the field **No. of Copies**



EDIT - COPY RENTAL UNIT

Options

Copy from RU No. RU00002

No. of Copies

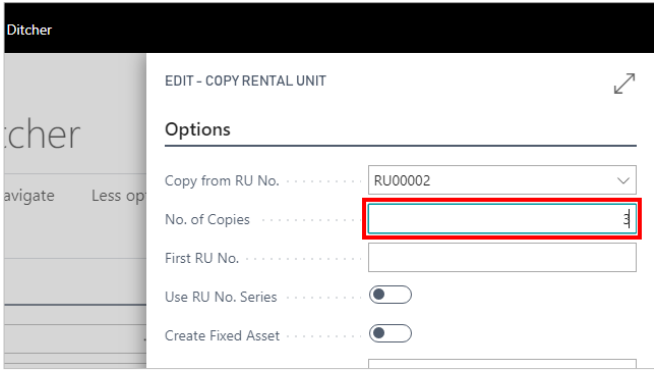
First RU No.

Use RU No. Series

Create Fixed Asset

Fixed Asset Templates

Enter the text **3**.



EDIT - COPY RENTAL UNIT

Options

Copy from RU No. RU00002

No. of Copies 3

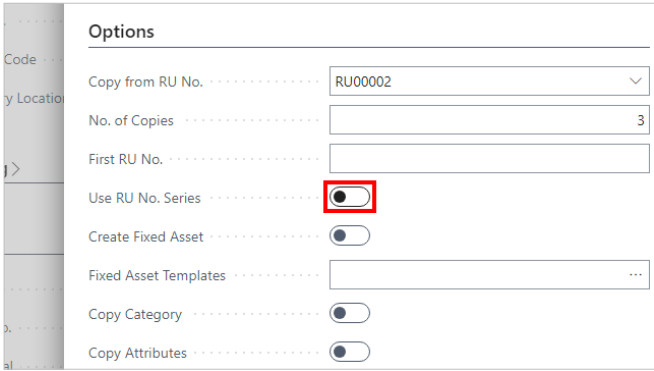
First RU No.

Use RU No. Series

Create Fixed Asset

Fixed Asset Templates

Click on the toggle field **Use RU No. Series**
When grey the toggle field specifies No.
When toggled to Yes, then the field will have the circle
at the right and be colored.



Options

Copy from RU No. RU00002

No. of Copies 3

First RU No.

Use RU No. Series

Create Fixed Asset

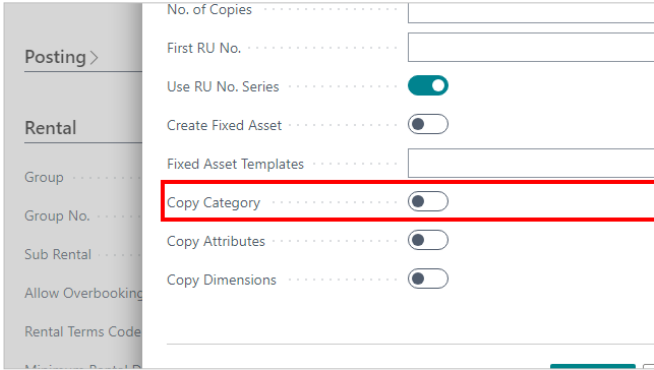
Fixed Asset Templates

Copy Category

Copy Attributes

Click on **Copy Category**

The options of Copy Category, Copy Attributes and
Copy Dimensions can be enabled if they are to be
copied to the new Rental Units.



Posting >

Rental

Group

Group No.

Sub Rental

Allow Overbooking

Rental Terms Code

No. of Copies

First RU No.

Use RU No. Series

Create Fixed Asset

Fixed Asset Templates

Copy Category

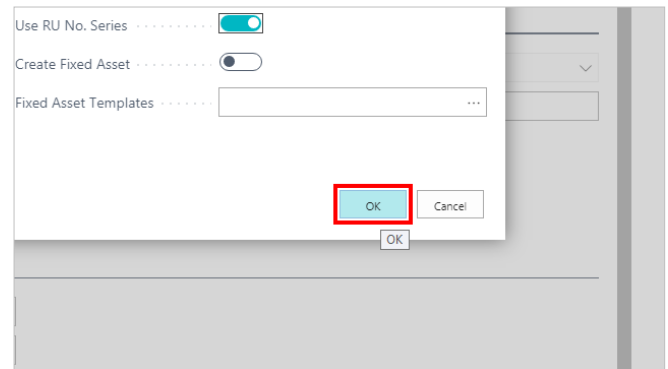
Copy Attributes

Copy Dimensions

ODT Rentals Online Help

Click on the button **OK**

When the OK button is selected the Rental Unit No. series will be updated to reflect the assigned of unit numbers based on the quantity entered in the No. of Copies field.



NOTE:

On the Copy Rental Unit page, the Rental Unit numbers generated can be overridden.

Click on the cell **Serial No.**

If serial numbers apply to the new units, then enter them on the applicable lines.

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher		EAST
Buckeye Ditcher		EAST
Buckeye Ditcher		EAST

Enter **Serial No.**

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher		EAST
Buckeye Ditcher		EAST
Buckeye Ditcher		EAST

Locations are mandatory when on Rental Management Setup the field Location Mandatory has been set to Yes.

When a Location is specified on the rental unit being copied, this location will default to the Copy Rental Unit window.

Click on the cell **Location Code**

CHER	
SERIAL NO.	LOCATION CODE
BD-003	EAST
	EAST
	EAST



Click on the cell **Serial No.**

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher		EAST
Buckeye Ditcher		EAST

Enter the text **BD-004**.

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher	BD	EAST
Buckeye Ditcher		EAST

Click on the cell **Location Code**

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher	BD-004	EAST
Buckeye Ditcher		EAST

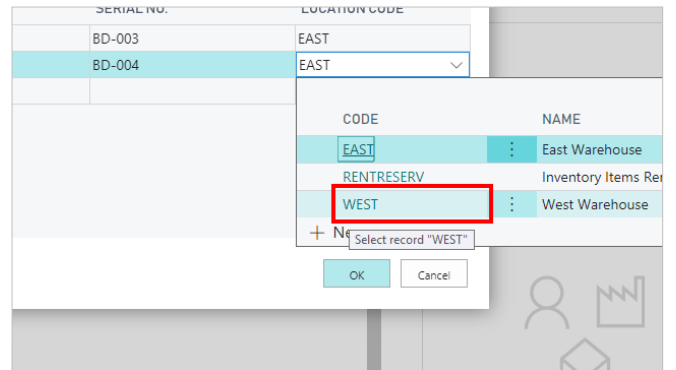
Click on the link in cell **Location Code**

The defaulted Location can be overridden. The next steps demonstrate this process.

CHER		
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher	BD-004	EAST
Buckeye Ditcher		EAST

ODT Rentals Online Help

Click on **Code = WEST**, Name = West Warehouse



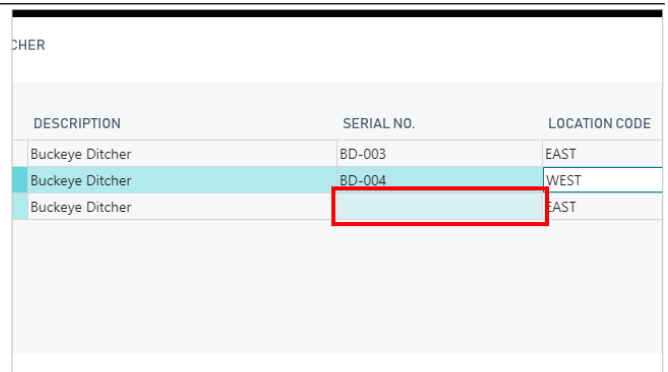
SERIAL NO.	LOCATION CODE
BD-003	EAST
BD-004	EAST

CODE	NAME
EAST	East Warehouse
RENTRESERV	Inventory Items Res
WEST	West Warehouse

+ New Select record "WEST"

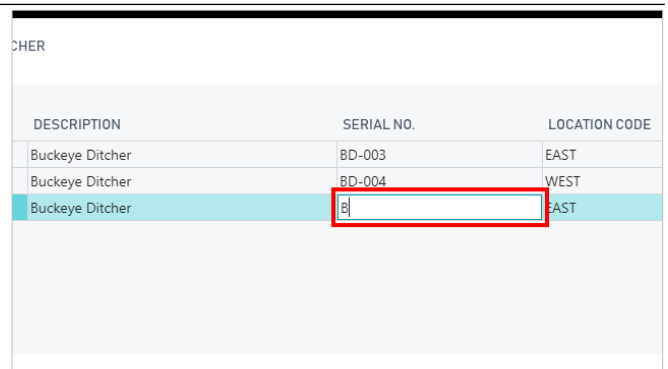
OK Cancel

Click on the cell **Serial No.**



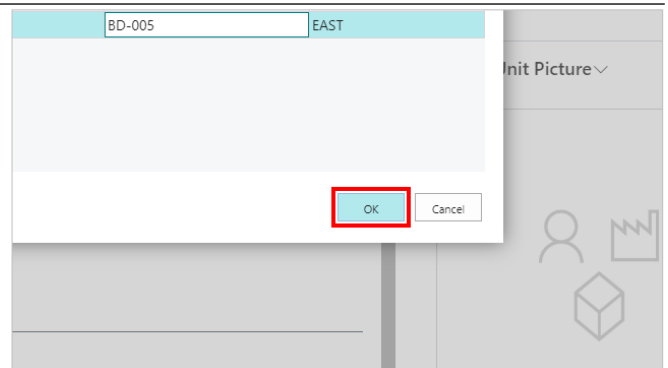
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher	BD-004	WEST
Buckeye Ditcher		EAST

Enter the text **BD-005**.



DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-003	EAST
Buckeye Ditcher	BD-004	WEST
Buckeye Ditcher	BD-005	EAST

Click on the button **OK**

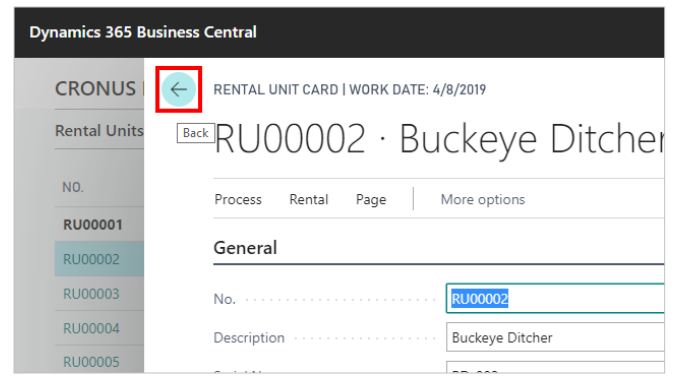


BD-005 EAST

Unit Picture v

OK Cancel

Click on the back button



Review of the newly created Rental Units is recommended. You can modify the Rental Unit as needed.

2.8.8. How to Copy Rental Units with Manual Numbering

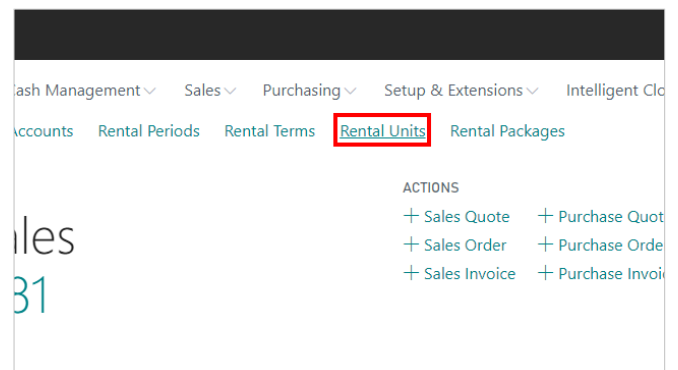
Profile - Business Manager

Rental Units can as well be setup using the Sales Order Processor profile.

The following example demonstrates the process from the Rental Unit card where the new Rental Unit No. will be specified.

The same steps can be done from the Rental Unit list.

Click on the navigation menu item **Rental Units**



Click on the link in cell **No.** with the value **RU00002**

Click on the row containing the Rental Unit you wish to copy.

CRONUS Rentals, Inc.			
Rentals Management | Rentals | Finance | Cash Management			
Rental Units: All | Search | + New | Manage | Process | Rent			
NO.	DESCRIPTION	GROUP	
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	R
RU00002	Buckeye Ditcher	<input type="checkbox"/>	R
RU Open record "RU00002" in a new window | e Ditcher			
RU00004	Buckeye Ditcher	<input type="checkbox"/>	R
RU00005	Buckeye Ditcher	<input type="checkbox"/>	R



Click on the navigation menu item popup **Home**

Rental Unit Card

RU00002 · Buckeye

Home Rental Related Automate

General

No. RU00002

Description Buckeye Ditcher

Click on the navigation menu item **Copy Rental Unit...**

Rental Unit Card

RU00002 · Buckeye

Home Rental Related Automate

Copy Rental Unit... Renumber Rental Unit

No. RU00002

Description Buckeye Ditcher

Serial No. BD-002

Click on the field **No. of Copies**

Copy Rental Unit

Options

Copy from RU No. RU00002

No. of Copies 1

First RU No.

Use RU No. Series

Create Fixed Asset

Fixed Asset Templates

Enter the text **1**.

Copy Rental Unit

Options

Copy from RU No. RU00002

No. of Copies 1

First RU No.

Use RU No. Series

Create Fixed Asset

Fixed Asset Templates



ODT Rentals Online Help

Click on **Use RU No. Series**

Ensure that in the Use RU No. Series field, the circle is disabled.

If the field is colored and the circle is at the right it is enabled, then to disable it, click on the field.

Serial No.	Options
Location Code	Copy from RU No. RU00002
Temporary Location	No. of Copies
Posting >	First RU No.
Rental	Use RU No. Series <input type="checkbox"/>
Group	Create Fixed Asset <input type="checkbox"/>
Group No.	Fixed Asset Templates
Sub Rental	Copy Category <input type="checkbox"/>
Allow Overbooking	Copy Attributes <input type="checkbox"/>
Rental Terms Code	

Click on the field **First RU No.**

on	Options
Code	Copy from RU No. RU00002
y Location	No. of Copies 1
1 >	First RU No.
	Use RU No. Series <input type="checkbox"/>
	Create Fixed Asset <input type="checkbox"/>
	Fixed Asset Templates
	Copy Category <input type="checkbox"/>

Enter the text **BD-006**.

Enter the first code to be used for creating the new units.

NOTE:

The code must end in a number when creating more than 1 unit in order to increment the numbering of the units.

on	Options
Code	Copy from RU No. RU00002
y Location	No. of Copies 1
1 >	First RU No.
	Use RU No. Series <input type="checkbox"/>
	Create Fixed Asset <input type="checkbox"/>
	Fixed Asset Templates
	Copy Category <input type="checkbox"/>

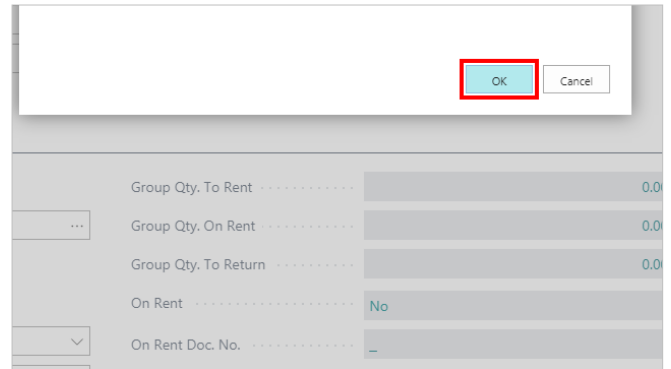
Click on **Copy Category**

The options of Copy Category, Copy Attributes and Copy Dimensions can be enabled if they are to be copied to the new Rental Units.

Posting >	No. of Copies
Rental	First RU No. BD-006
Group	Use RU No. Series <input type="checkbox"/>
Group No.	Create Fixed Asset <input type="checkbox"/>
Sub Rental	Fixed Asset Templates
Allow Overbooking	Copy Category <input type="checkbox"/>
Rental Terms Code	Copy Attributes <input type="checkbox"/>
	Copy Dimensions <input type="checkbox"/>

ODT Rentals Online Help

Click on the button **OK**




The Rental Unit No. generated can be overridden on the list of new units being created.

Click on the cell **Serial No.**



DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher		EAST

Enter **Serial No.**



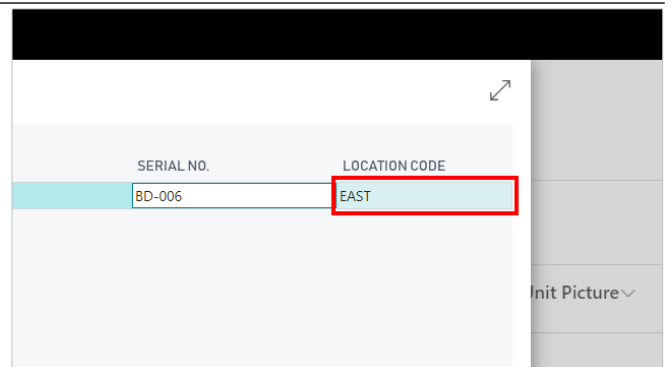
DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher		EAST

Click on the cell **Location Code**

When on Rental Management Setup the field Location Mandatory has been set to Yes, then Locations are mandatory.

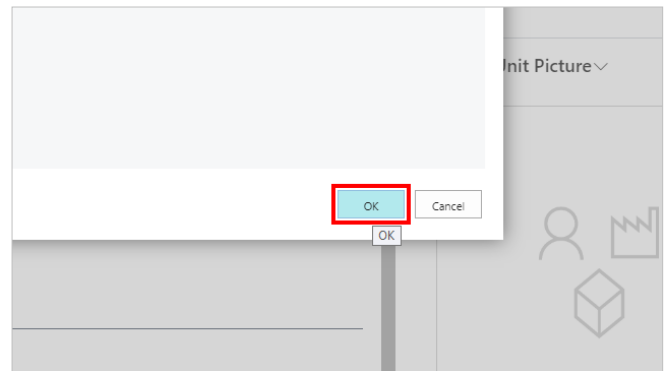
When a Location is specified on the rental unit being copied, this location will default to the Copy Rental Unit window.

This Location can be overridden, if applicable.

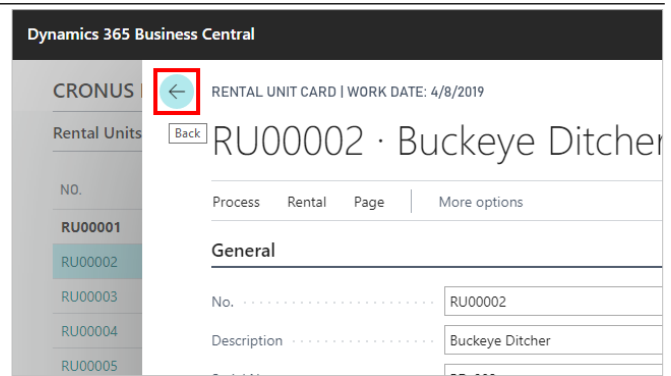


SERIAL NO.	LOCATION CODE
BD-006	EAST

Click on the button **OK**



Click on the back button



Review of the newly created Rental Units is recommended. You can modify the Rental Unit as needed.

NOTE

Currently when copying a rental unit which has Dimensions setup, the Dimensions are not copied to the new unit. Therefore, should the organization be using Dimensions on Rental Units, then the Dimensions will need to be setup on the new units.

2.8.9. How to Copy Rental Units and Automatically Create Fixed Assets

2.8.9.1. Overview

The Rentals provides for the ability to copy a Rental Unit to create 1 or many units and automatically create Fixed Assets at the same time. With this feature, the assets created will be linked to the units created on a one-to-one basis.

In order to facilitate the feature a Configuration Template for Fixed Assets must be created for the automatic creation of the asset.

The Fixed Asset template will automatically assign the default data specified in the template, for the following fields, to the Fixed Assets being created:

- Class Code
- Subclass Code
- Depreciation Book
- Posting Group (Fixed Asset posting group)

Multiple templates can be configured for selection on the Copy Rental Unit request page to facilitate the different values that could be used with the fields required on the template.

Using the Copy Rental Unit feature, the option Create Fixed Asset must be checked, and the applicable Fixed Asset Template must be selected. The asset will have the same Description, Serial No., and Rental Location on the Rental tab, as specified in the Copy Rental Unit request page.

Once the Fixed assets have been created, the user will still be required to edit the Fixed Asset card to complete the other setups on the card. The asset will as well still need to be acquired.

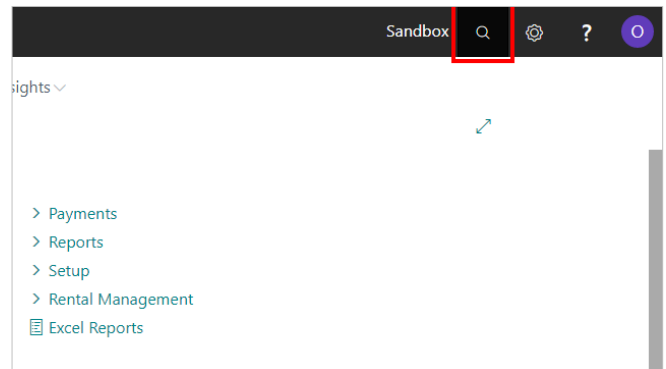
NOTE

Currently when copying a rental unit which has Dimensions setup, the Dimensions are not copied to the new unit. Therefore, should the organization be using Dimensions on Rental Units, the Dimensions will need to be setup on the new units.

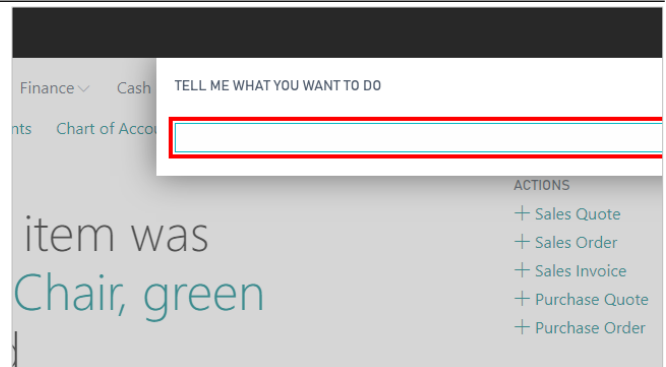
2.8.9.2. How to Setup a Fixed Asset Configuration Template

Profile - Business Manager

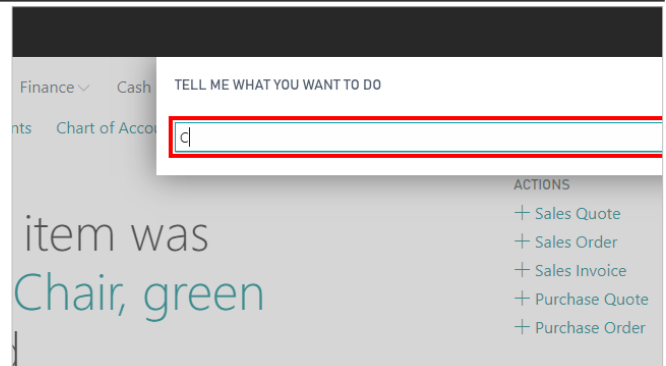
Click on the link



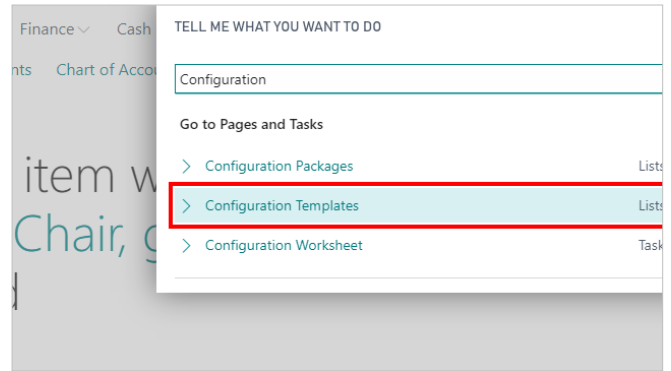
Click on the field **Type to start search:**



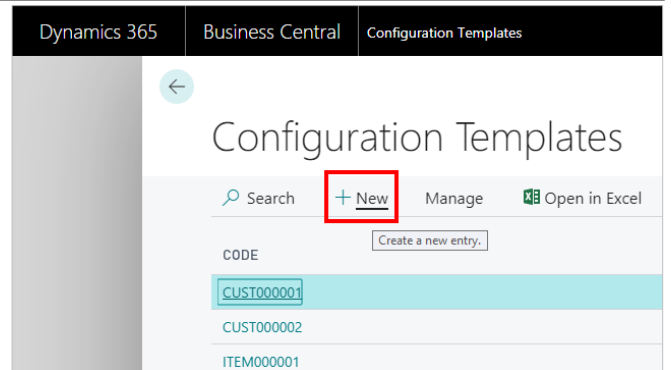
Enter the text **Configuration.**



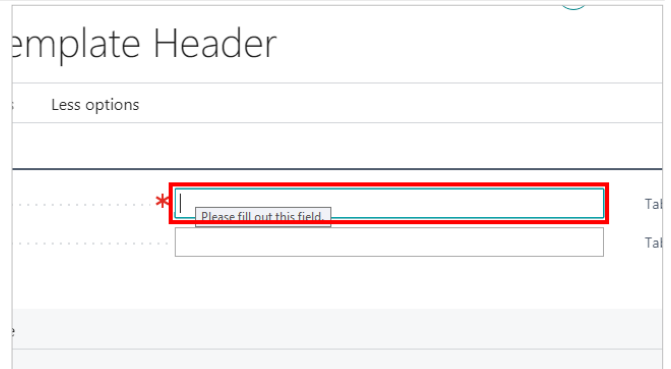
Click on **Configuration Templates Lists**



Click on the navigation menu item **New**



Click on the field **Code, (Blank)**



Enter the text **ASSET0001**.





ODT Rentals Online Help

Click on the field **Description, (Blank)**

template header

Less options

ASSET0001

FIELD NAMEFIELD CAPTIONTEMPLATE CODE

Enter the text **Asset Equipment for Rental Linking.**

Header

ASSET0001

A

NAMEFIELD CAPTIONTEMPLATE CODE

Click on the field **Table ID**

3

SKIP
RELATION
CHECKMANDAT...REFERENCE

Enter the text **5600.**

3

SKIP
RELATION
CHECKMANDAT...REFERENCE



Click on the link in cell **Field Name** with the value

Description Asset Equipment for Rental Link

Lines | Manage

TYPE	FIELD NAME	FIELD CAPTION
Field		

Open record "" in a new window

Click on the link in cell **Name** with the value **FA Class Code**

ns

NAME

No

Description

Search Description

Description 2

FA Class Code

FA Select record "FA Class Code"

Global Dimension 1 Code

Global Dimension 2 Code

Location Code

FA Location Code

Vendor No

Click on the cell **Default Value**

Linking Table Name Fixed /

TEMPLATE CODE	DEFAULT VALUE	SKIP REL. CHECK

Enter the text **Tangible**.

Enter the FA Class that is to apply to the Fixed Asset Template being setup.

Linking Table Name Fixed /

TEMPLATE CODE	DEFAULT VALUE	SKIP REL. CHECK
	Tangible	



ODT Rentals Online Help

Click on the link in cell **Field Name** with the value

Description		Asset Equipment for Rental Lin	
Lines			
TYPE	FIELD NAME	FIELD CAPTION	
Field	FA Class Code	FA Class Code	
		Open record "FA Class Code" in a new window.	

Click on the link in cell **Name** with the value **FA Subclass Code**

NAME
No.
Description
Search Description
Description 2
FA Class Code
FA Subclass Code
Global Dimension 1 Code
Global Dimension 2 Code
Location Code
FA Location Code
Vendor No.
Main Asset/Component

Click on the cell **Default Value**

TEMPLATE CODE	DEFAULT VALUE	SKIP RELA. CHEC
	TANGIBLE	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

Enter the text **Equipment**.

Enter the FA Subclass that is to apply to the Fixed Asset Template being setup.

TEMPLATE CODE	DEFAULT VALUE	SKIP RELA. CHEC
	TANGIBLE	<input type="checkbox"/>
	E	<input type="checkbox"/>
		<input type="checkbox"/>



Click on the back button

Open the template created in order to specify the Depreciation Book Code and Posting Group.

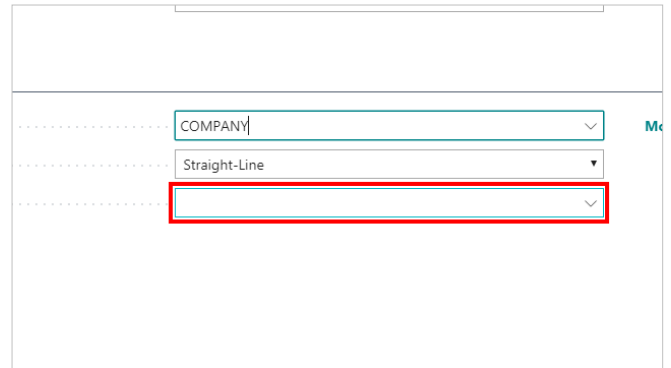
Click on the link in cell **Code** with the value **ASSET0001**

Click on the field **Depreciation Book Code, (Blank)**

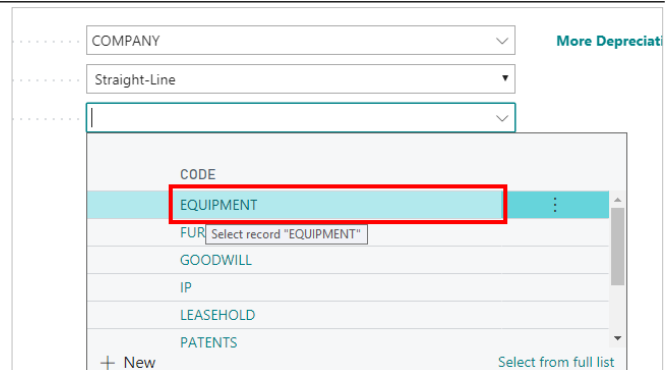
Click on **Code = COMPANY, Description = Company Book**

The default Depreciation Method is Straight-Line. If the template requires a different Depreciation Method, then select the applicable method.

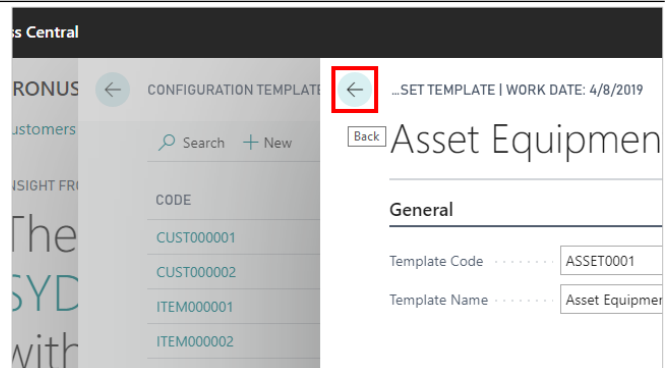
Click on the field **Posting Group, (Blank)**



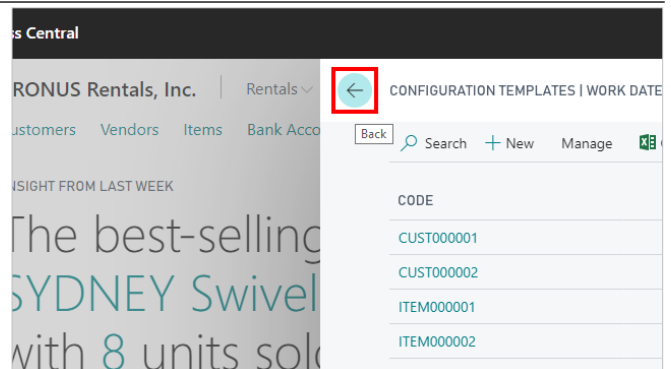
Click on **Code = EQUIPMENT**



Click on the back button



Click on the back button



A secondary Configuration Template is automatically created for the Depreciation Book tab of the asset template created. As the Depreciation Book, Depreciation Method and Posting Group are specified on the asset template created, the secondary template does not require any user setups.

2.8.9.3.

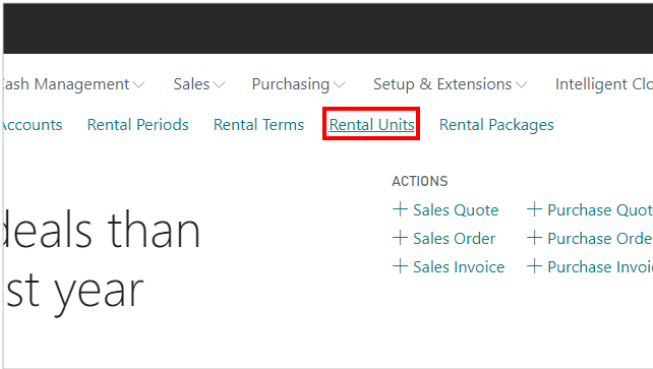
Assets

Steps to Copy Rental Units and Automatically Create Fixed

Profile - Business Manager



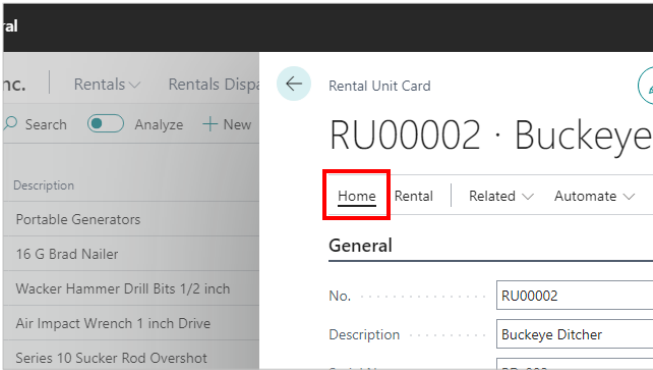
Click on the navigation menu item **Rental Units**



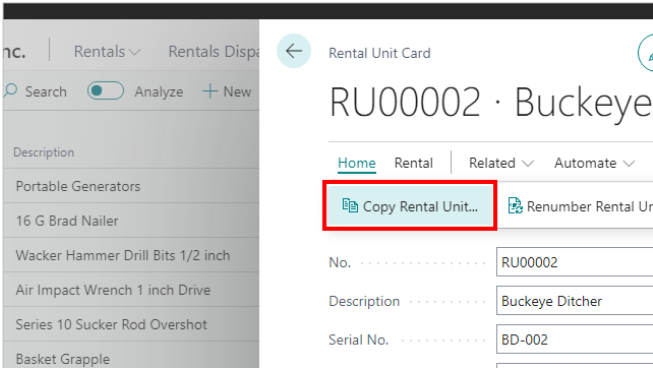
Click on the link in cell **No.** with the value **RU00002**

RU00032	Series 10 Sucker Rod Overshot	<input type="checkbox"/>	
RU00033	Basket Grapple	<input type="checkbox"/>	
RU00034	Spiral Grapple	<input type="checkbox"/>	
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU0
BD-006	Buckeye Ditcher	<input type="checkbox"/>	RU0
RU00002	Buckeye Ditcher	<input type="checkbox"/>	RU0
RU00003	Buckeye Ditcher	<input type="checkbox"/>	RU0
RU00004	Buckeye Ditcher	<input type="checkbox"/>	RU0
RU00005	Buckeye Ditcher	<input type="checkbox"/>	RU0
RU00006	Buckeye Ditcher	<input type="checkbox"/>	RU0

Click on the navigation menu item popup **Home**



Click on the navigation menu item **Copy Rental Unit...**





Click on the field **First RU No.**

In this example the Rental Unit No. Series will be used.
Should the field, First RU No. have data, then delete the data.

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

Options

Copy from RU No. RU00002

No. of Copies 1

First RU No. BD-006

Use RU No. Series ☐

Create Fixed Asset ☐

Click on **Use RU No. Series, No**

Based on the last use of the Copy Rental Unit, the field is showing as No.
Clicking on the toggle field will set the field to Yes.

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

Options

Copy from RU No. RU00002

No. of Copies 1

First RU No.

Use RU No. Series ☒

Create Fixed Asset ☐

Click on **Create Fixed Asset, No**

By default, the Create Fixed Asset is set to No, which shows the field as grey and the circle in the field at the left.
Clicking on the toggle field will set the field to Yes.

Use default values from: Last used options and filters

Options

Copy from RU No. RU00002

No. of Copies 1

First RU No.

Use RU No. Series ☒

Create Fixed Asset ☒

Fixed Asset Templates

Click on the lookup button **Fixed Asset Templates**

Copy from RU No. RU00002

No. of Copies 1

First RU No.

Use RU No. Series ☒

Create Fixed Asset ☒

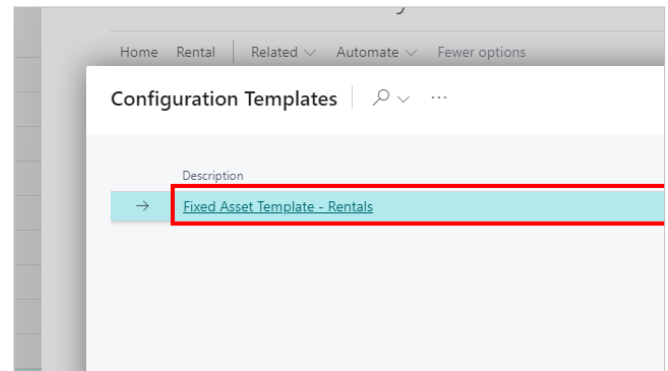
Fixed Asset Templates ...

Copy Category ☐

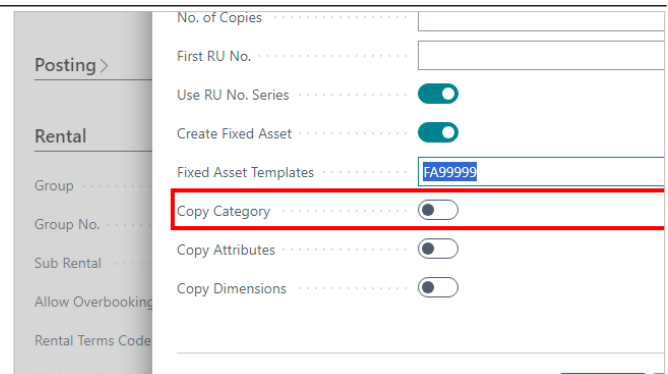
Copy Attributes ☐

Copy Dimensions ☐

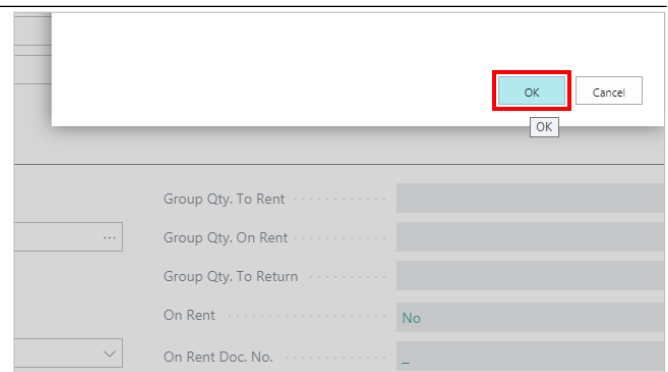
Click on the link in cell **Description** with the value
Fixed Asset Template - Rentals



Click on **Copy Category**



Click on the button **OK**



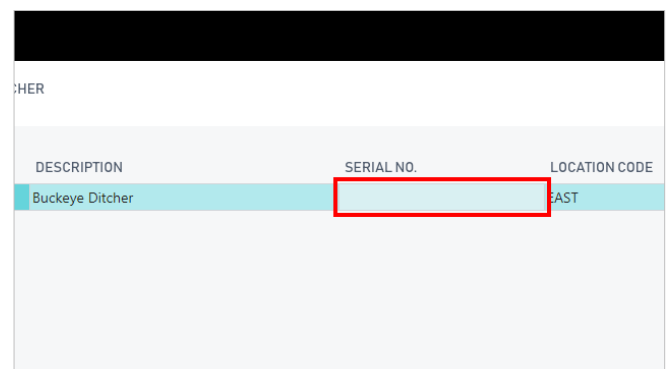
NOTE:

The Rental Unit No. generated can be overridden on the list of new units being created.

Click on the cell **Serial No.**

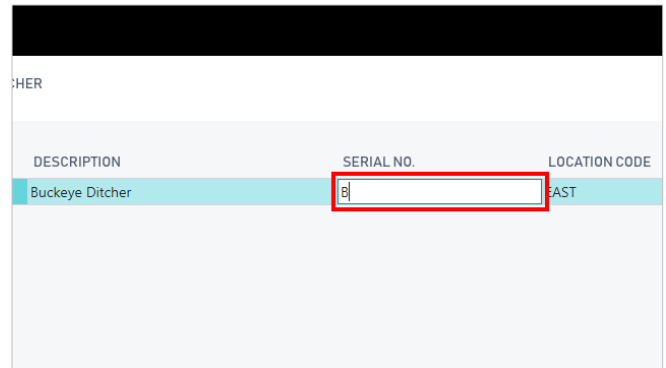
Should the organization have a Serial No. for the asset, then enter the Serial No.
Otherwise leave the field blank.

The Serial No. will be included on the new Fixed Asset that will be created.



ODT Rentals Online Help

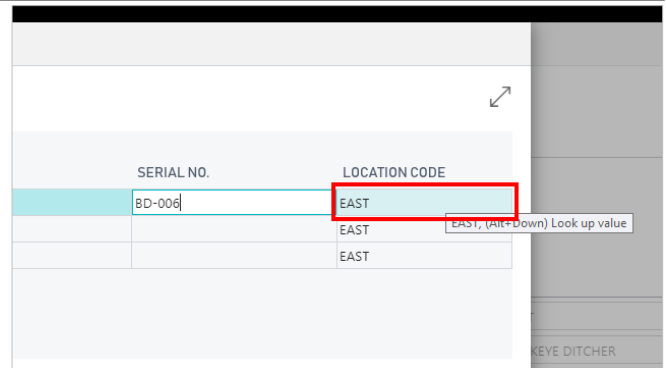
Enter the text **BD-006**.



DESCRIPTION	SERIAL NO.	LOCATION CODE
Buckeye Ditcher	BD-006	EAST

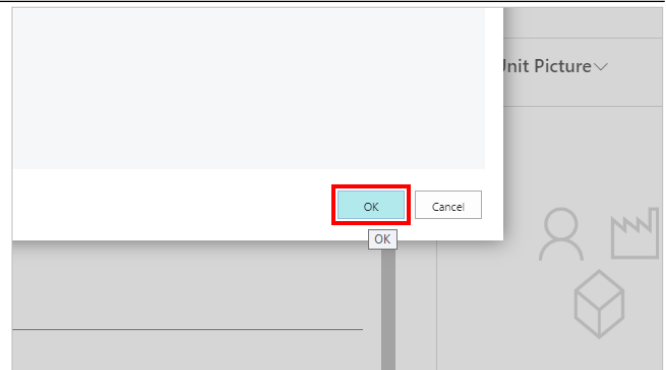
Click on the cell **Location Code**

Accept the Location, or lookup and select the applicable rental location.

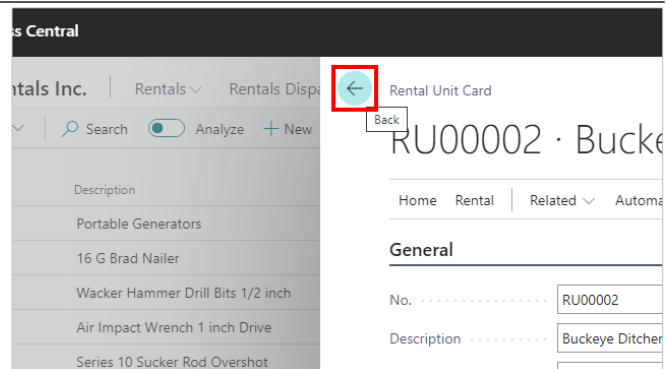


SERIAL NO.	LOCATION CODE
BD-006	EAST

Click on the button **OK**



Click on the back button



RU00002 · Buckeye Ditcher

Home Rental Related Automate

General

No. RU00002

Description Buckeye Ditcher

The following provides a review of the Fixed Asset card created.



Click on the navigation menu item popup **Finance**

mics 365 Business Central			
RONUS Rentals, Inc. | Rentals ▾ Finance ▾ Cash Management ▾ Sales ▾			
ental Units: All ▾ | 🔍 Search + New Collect and make payments, prepare statements, and n			
NO.	DESCRIPTION	GROUP	GROUP NO
D-006	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU00001
RU00002	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00003	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00004	Buckeye Ditcher	<input type="checkbox"/>	RU00001

Click on the navigation menu item **Fixed Assets**

mics 365 Business Central			
RONUS Rentals, Inc. | Rentals ▾ Finance ▾ Cash Management ▾ Sales ▾			
General Journals G/L Account Categories Fixed Assets Intrastat Journals Pu			
Chart of Accounts G/L Budgets Account Schedules Sales Budgets Sa			
NO.	DESCRIPTION	GROUP	GROUP NO
D-006	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU00001
RU00002	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00003	Buckeye Ditcher	<input type="checkbox"/>	RU00001
RU00004	Buckeye Ditcher	<input type="checkbox"/>	RU00001

Click on the link in cell **No.** with the value **RU00006**

CRONUS Rentals, Inc. | Finance ▾ Cash Management ▾

General Journals G/L Account Categories Fixed Assets

Chart of Accounts G/L Budgets Account Sched

Fixed Assets: All | 🔍 Search + New Manage ▾

NO.		DESCRIPTION
RU00006	...	Buckeye Ditcher
RU00007	Open record "RU00006" in a new window	Buckeye Ditcher
RU00008		Buckeye Ditcher

Click on the field **Serial No.**

The Serial No. specified when copying the unit automatically populates the Serial No. field on the asset.

Buckeye Ditcher	Search Descr
TANGIBLE	Responsible E
EQUIPMENT	Inactive
EAST	Blocked
<input type="checkbox"/>	Acquired
BD-RU006	Last Date Mo
Component	
Code	WEST Rental Unit N



ODT Rentals Online Help

Click on the field **Rental Location Code**

The Location Code specified when copying the unit automatically populates the Rental Location Code field on the asset.

BD-RU006

WEST

COMPANY

Click on the field **Rental Unit No.**

The Rental Unit No. that the asset is linked to is displayed. When clicked on the Rental Unit card will automatically open.

RU00006

Show less

0.00

The Fixed Asset card(s) must have additional setups completed and the asset(s) must be acquired.

The following steps demonstrate the fields that need to be completed on the asset card(s).

Click on the field **Depreciation Starting Date**

6/7/2018

Show less

0.00

Click on the link **Open the date picker**

Straight-Line

Book Value

Open the date picker



Click on the link **Previous**

Depreciation Book

Depreciation Method Straight-Line

Depreciation Starting Date *

No. of Depreciation Years **◀ April 2019 ▶** 0.00

Depreciation Ending Date *

Maintenance >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Click on the link **Previous**

Depreciation Book

Depreciation Method Straight-Line

Depreciation Starting Date *

No. of Depreciation Years **◀ March 2019 ▶** 0.00

Depreciation Ending Date *

Maintenance >

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Click on the link **Previous**

Depreciation Book

Depreciation Method Straight-Line

Depreciation Starting Date *

No. of Depreciation Years **◀ February 2019 ▶** 0.00

Depreciation Ending Date *

Maintenance >

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

Click on a date in the calendar

Enter or select the date that Depreciation is to commence.

Depreciation Book

Depreciation Method Straight-Line

Depreciation Starting Date *

No. of Depreciation Years **◀ January 2019 ▶** 0.00

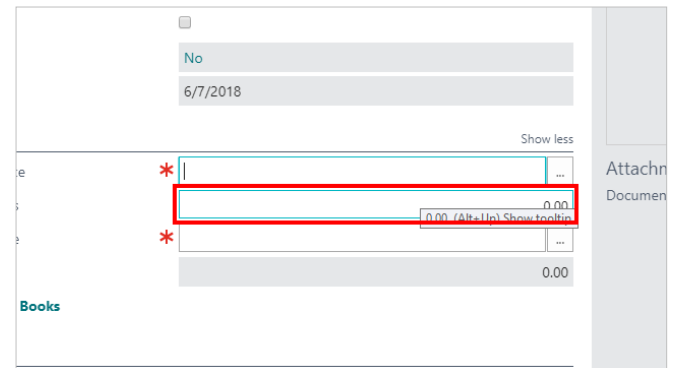
Depreciation Ending Date *

Maintenance >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

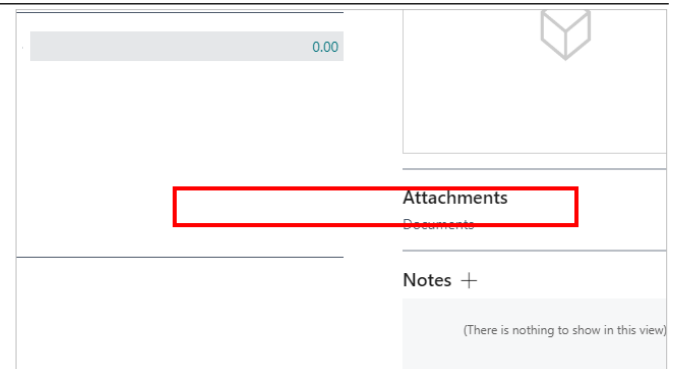
Today Done

Click on the field **No. of Depreciation Years**



Enter the text **5**.

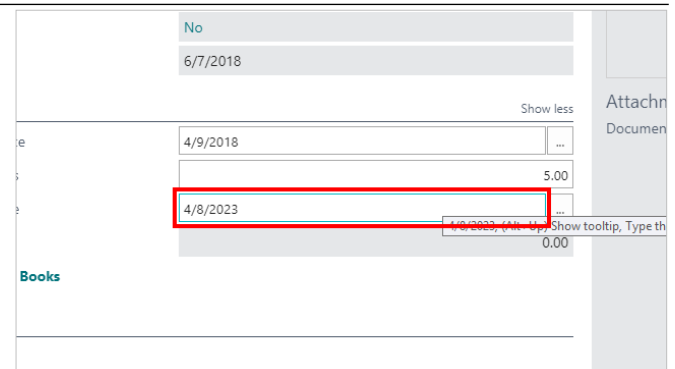
Enter the number of Depreciation Years when the Depreciation Method is Straight-Line.



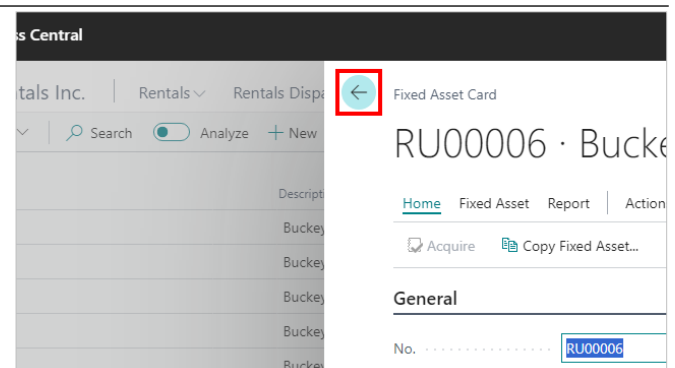
Click on the field **Depreciation Ending Date**

If the Depreciation Method is not Straight-Line, then the Depreciation Ending Date field must be set.

For Straight-Line, this date is automatically calculated based on the No. of Depreciation Years entered.



Click on the back button



Review of the newly created Rental Units is recommended. You can modify the Rental Unit as needed.

The Fixed Asset will need to be acquired, which is not covered here.

The Wizard option to acquire the asset is available at the top of the asset card.

2.8.10. How to Transfer Inventory to FA and Rental Units

2.8.10.1. Overview

The Inventory transfers to Fixed Assets provided the capability to automatically create Rental Units within a

ODT Rentals Online Help

rental group, and Fixed Assets using a selected Fixed Asset Configuration Template, based on the item quantity specified. The Fixed Assets will automatically be linked to the Rental Units created.

NOTE:

The use of Locations in rentals is required in order to transfer items to assets and units.

The item being transferred does not have to be in a Location.

As with copying rental units, the transfer process provides the option to either use the No. Series for Rental Units or to specify a starting number that will increment by one when the quantity being transferred is greater than one.

The new rental units and linked fixed assets will have the same number.

The following settings on the Rental Unit Group will flow to the rental units created:

- Dimensions
- Rental Category Code
- Attributes - no values
- Rental Term
- Minimum Rental Duration
- Gen. Prod. Posting Group
- Tax Group Code
- Usage tab – Metered Usage and Periodic Usage

When Items are transferred to Fixed Assets, the Unit Cost is used as the Acquisition Cost on the assets, with the exception of items that have the Costing Method of Specific for serialized items.

When these serialized items are transferred to assets, then the acquisition cost on the assets will be the specific cost for each serialized item selected.

NOTE:

Currently items located in Bins cannot be transferred to Fixed Assets.

2.8.10.2. Setup Required to Transfer Items to Fixed Assets

In order to transfer Items to Fixed Assets the following setups must be completed:

- A Configuration Template for Fixed Assets must be created for the automatic creation of the asset.

To learn how to setup the Fixed Asset configuration template, see ODT Rental Online Help, Setup Rentals, Setup Rental Units, How to Copy Rental Units and Automatically Create Fixed Assets.

- The Item card, Rental tab must be configured. The configuration of the following fields are mandatory in order to transfer from the item to a fixed asset.

Allow Rental Transfer:

Specifies whether the item can be transferred to a fixed asset and rental unit.

Default Rental Unit FA Template:

Specifies the fixed asset configuration template to be used when creating the fixed asset.

Rental Unit Group No.:

Specifies the rental unit group that the new rental unit is to be assigned to.

The following demonstrates completing the setups on an Item card.



Click on the navigation menu item **Items**

CRONUS Rentals, Inc. | Rentals Finance Cash Man

Customers Vendors **Items** Bank Accounts Chart of Accounts

INSIGHT FROM LAST WEEK

Your top customer was
Relecloud, bought for \$3

Click on the link in cell **No.** with the value **1000**

CRONUS Rentals, Inc. | Rentals Finance Cash Management

Customers Vendors Items Bank Accounts Chart of Accounts Rental Period

Items: All Search + New Delete Process Item Request

No. ↑	Description	Type
1000	Portable Generators	Inventory
1001	Wacker Hammer Drill Bits 1/2 inch	Inventory
1002	Wacker Hammer Drill Bits 3-Flat 1 inch	Inventory
1003	Air Impact Wrench, 1 in.	Inventory
1004	Air Impact Wrench, 1/2 inch	Inventory

Click on the toggle field **Allow Rental Transfer**

is Posted to G/L ☐

ial Purch. Prices & Discounts

ital

ow Rental Transfer ☒

ult Rental Unit FA Template

ces & Sales >

Click on the field **Default Rental Unit FA Template**

nts

☒

e



Click on the link in cell **Code** with the value **FA99999**

Click on the field **Rental Unit Group No.**

Click on the link in cell **No.** with the value **RU00030**

2.8.10.3. How to Transfer Items to Fixed Assets and Rental Units

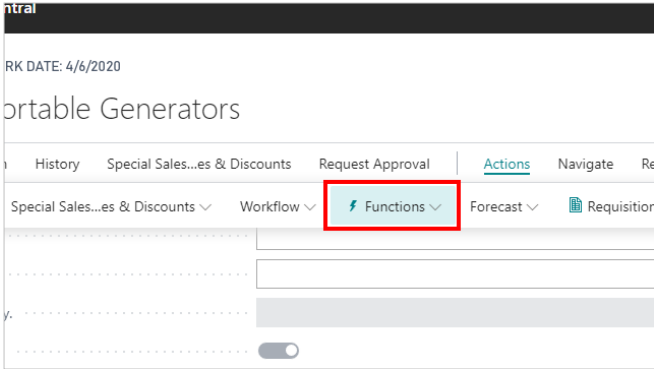
The following demonstrates transferring a multiple quantity of the Item above with the Rentals tab configured.

In this example the item is not serialized, and the Rental Unit No. Series will not be used.

Click on the navigation menu item popup **Actions**

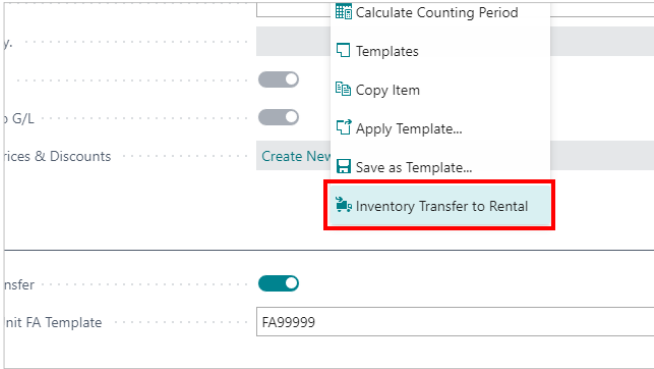


Click on the navigation menu item popup **Functions**

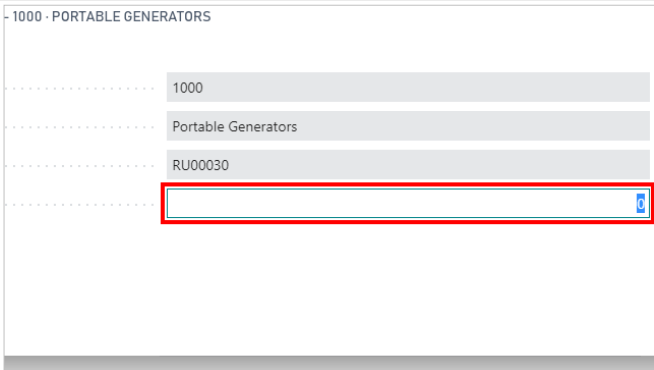


The Inventory Transfer To Rental is also located in the Process menu option.

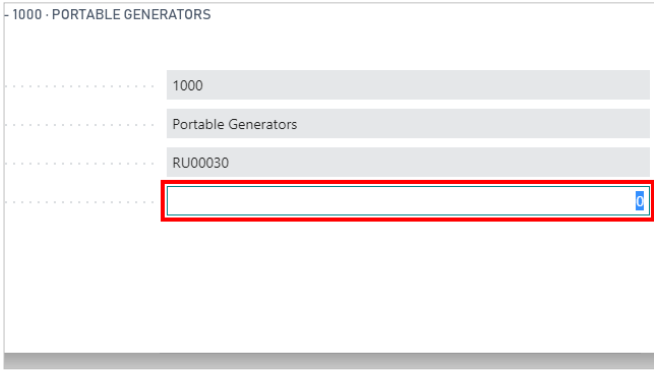
Click on the navigation menu item **Inventory Transfer to Rental**



Click on the field **Qty To Transfer**



Enter the text **3**.





Click on the field **Transfer From Location**

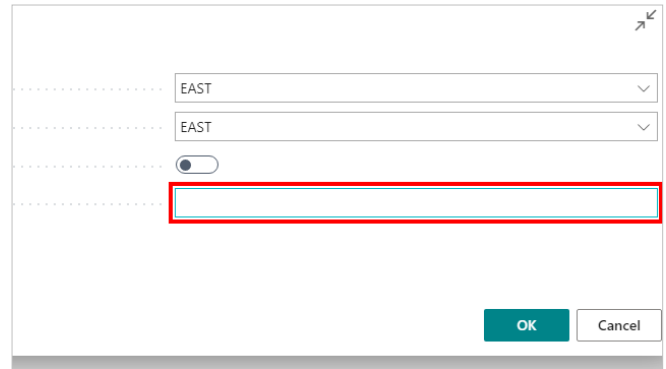
Click on the link in cell **Code** with the value **EAST**

Click on the field **Transfer To Location**

Click on the toggle field Use Rental Unit No. Series

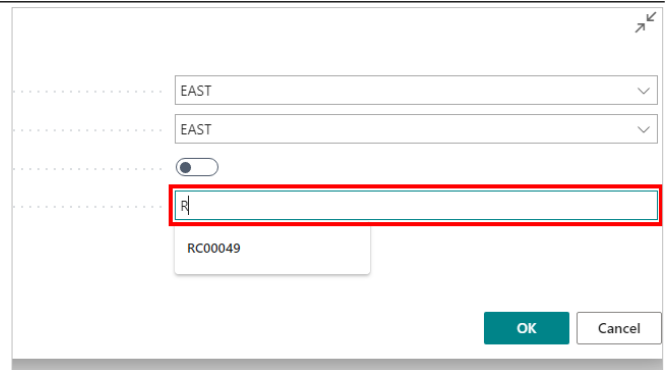
By default the Use Rental Unit No. Series is enabled.
To set a Starting No., this field must be disabled.

Click on the field **Starting No.**



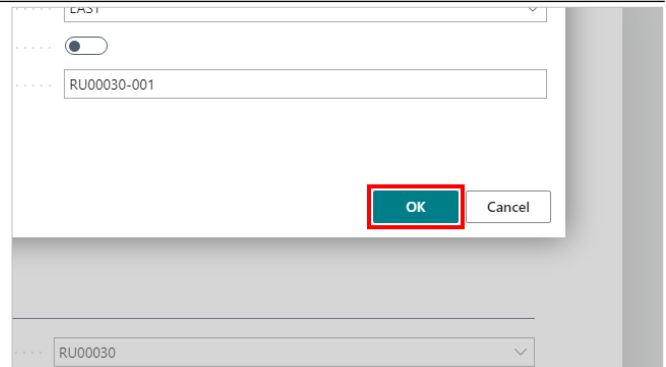
The screenshot shows a form with two dropdown menus, both set to 'EAST'. Below them is a toggle switch and a text input field. The text input field is highlighted with a red box. At the bottom right, there are 'OK' and 'Cancel' buttons.

Enter the text **RU00030-001**.



The screenshot shows the same form as before, but now the text input field contains 'RU00030-001' and is highlighted with a red box. A dropdown menu below the input field shows 'RC00049'. The 'OK' and 'Cancel' buttons are still at the bottom right.

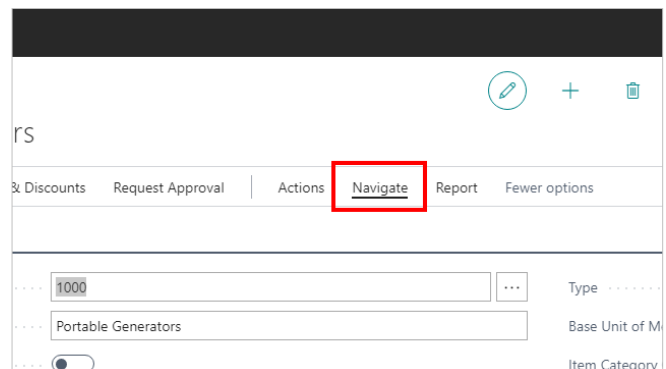
Click on the button **OK**



The screenshot shows the same form as before, but now the 'OK' button is highlighted with a red box. The text input field still contains 'RU00030-001'.

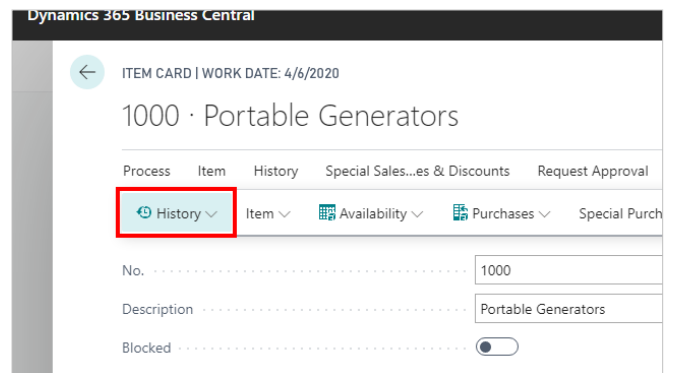
The following demonstrates the review of the Item Journal, negative adjustment entry created and posted during the transfer process.

Click on the navigation menu item popup **Navigate**



The screenshot shows a navigation menu with several items: 'Discounts', 'Request Approval', 'Actions', 'Navigate', 'Report', and 'Fewer options'. The 'Navigate' item is highlighted with a red box. Below the menu, there are several input fields and a toggle switch.

Click on the navigation menu item popup **History**



ITEM CARD | WORK DATE: 4/6/2020

1000 · Portable Generators

Process Item History Special Sales...es & Discounts Request Approval

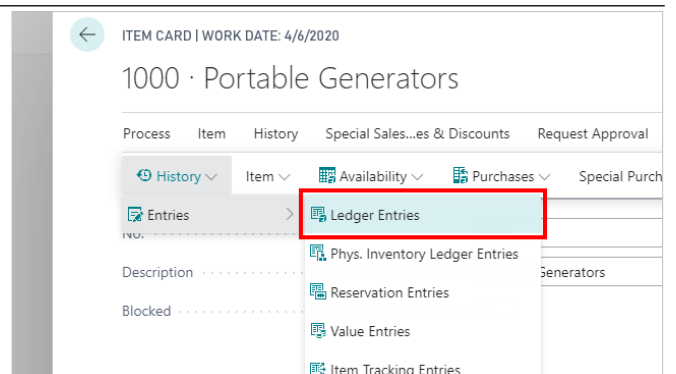
History Item Availability Purchases Special Purch

No. 1000

Description Portable Generators

Blocked

Click on the navigation menu item **Ledger Entries**



ITEM CARD | WORK DATE: 4/6/2020

1000 · Portable Generators

Process Item History Special Sales...es & Discounts Request Approval

History Item Availability Purchases Special Purch

Entries Ledger Entries

Phys. Inventory Ledger Entries

Description Portable Generators

Blocked

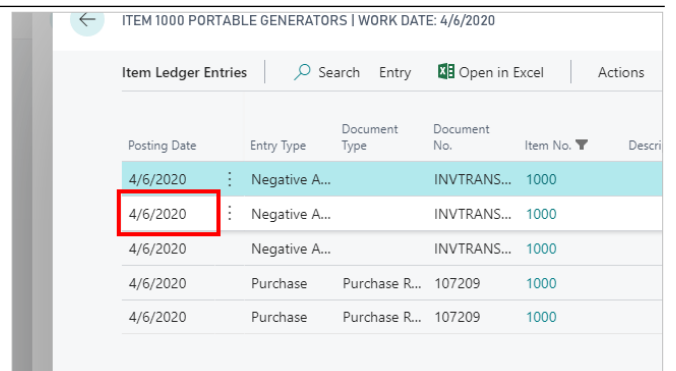
Reservation Entries

Value Entries

Item Tracking Entries

Click on the cell **Posting Date** with the value **4/6/2020**

The Posting Date used in the Item Journal is the users' Work Date when the transfer is processed.



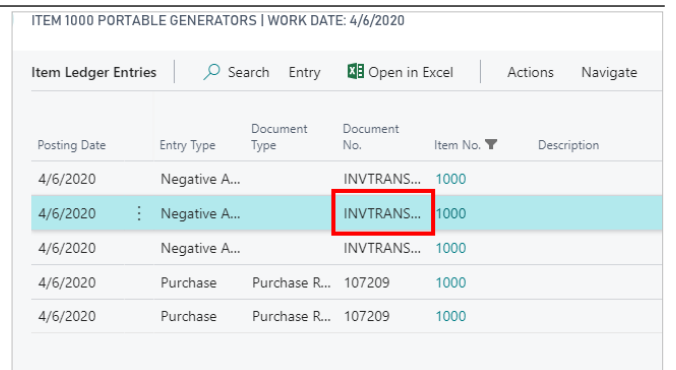
ITEM 1000 PORTABLE GENERATORS | WORK DATE: 4/6/2020

Item Ledger Entries Search Entry Open in Excel Actions

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Purchase	Purchase R...	107209	1000	
4/6/2020	Purchase	Purchase R...	107209	1000	

Click on the cell **Document No.** with the value **INVTRANS0000000**

The Document No. is automatically generated by the transfer coding.



ITEM 1000 PORTABLE GENERATORS | WORK DATE: 4/6/2020

Item Ledger Entries Search Entry Open in Excel Actions Navigate

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Purchase	Purchase R...	107209	1000	
4/6/2020	Purchase	Purchase R...	107209	1000	

Click on the cell **Cost Amount (Actual)** with the value **-200.00**

The Unit Cost on the item card populates the Cost Amount (Actual) field.

Invoked Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invntbl.)	Open	Ord
-1	0	0.00	-200.00	0.00	<input type="checkbox"/>	
-1	0	0.00	-200.00	0.00	<input type="checkbox"/>	
-1	0	0.00	-200.00	0.00	<input type="checkbox"/>	
20	20	0.00	4,000.00	0.00	<input checked="" type="checkbox"/>	
20	17	0.00	4,000.00	0.00	<input checked="" type="checkbox"/>	

Click on the back button

Dynamics 365 Business Central

ITEM 1000 PORTABLE GENERATORS | WORK DATE: 4/6/2020

Item Ledger Entries | Search | Entry | Open in Excel | Actions

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Negative A...		INVTRANS...	1000	
4/6/2020	Purchase	Purchase R...	107209	1000	

The following demonstrates a review of the Fixed Assets created.

Click on the navigation menu item popup **Finance**

RONUS Rentals, Inc. | Rentals | Finance | Cash Management | Sales

Customers | Vendors | Items | Bank Accounts | Chart of Accounts | Rental Periods | R

SIGHT FROM LAST WEEK

Your top customer was Relecloud, bought for \$3,082

Click on the navigation menu item **Fixed Assets**

RONUS Rentals, Inc. | Rentals | Finance | Cash Management | Sales

General Journals | G/L Account Categories | Fixed Assets | Sales Budgets | Se

Chart of Accounts | G/L Budgets | Account Schedules | Purchase Budgets | P

SIGHT FROM LAST WEEK

Your top customer was Relecloud, bought for \$3,082



ODT Rentals Online Help

Click on the cell **No.** with the value **RU00030-001**

Note that there were 3 Fixed Assets created as the quantity to transfer from the item was 3.

RU00024-001	Wacker 50Z3 Excavator
RU00024-002	Wacker 50Z3 Excavator
RU00024-003	Wacker 50Z3 Excavator
RU00025-001	Wacker Hammer Drill
RU00025-002	Wacker Hammer Drill
RU00030-001	Portable Generators
RU00030-002	Portable Generators
RU00030-003	Portable Generators

Click on the link in cell **No.** with the value **RU00030-001**

RU00024-001	Wacker 50Z3 Excavator
RU00024-002	Wacker 50Z3 Excavator
RU00024-003	Wacker 50Z3 Excavator
RU00025-001	Wacker Hammer Drill
RU00025-002	Wacker Hammer Drill
RU00030-001	Portable Generators
RU00030-002	Portable Generators
RU00030-003	Portable Generators

Click on the field **Rental Location Code**

The Rental Location is populated with the Transfer To Location specified when processing the transfer.

Acquired

Last Date Mo

Component

code EAST Rental Unit N

on

Book

Book Code COMPANY Book Value

Click on the field **Rental Unit No.**

The Rental Unit No. displayed is the unit that was created, and the asset is linked to. When the Rental Unit No. is clicked on the Rental Unit List filter to the display the unit will open. The Rental Unit Card can be opened from the list.

ed 11/6/2020

RU00030-001

Open details for "Rental Unit No." "RU00030-001"

Show less

200.00



ODT Rentals Online Help

Click on the field **Book Value**

The screenshot shows a web interface with a search bar containing 'RU00030-001'. Below the search bar, there is a 'Show less' link. A table lists items, with the 'Book Value' field highlighted by a red box and showing the value '200.00'. To the right of the table, there is a link 'Open details for "Book Value"'. Below the table, there is a 'Convention' toggle switch and a link 'Depreciation Books'.

When clicking on the Book Value amount the FA Ledger Entries list will open.

The FA Ledger Entry, which was automatically created and posted when the item was transferred to an asset will be displayed.
The Posting Date on the entry will be the users' work date at the time of processing the transfer.

Click on **Depreciation Book**

The screenshot shows a 'Rentals' form with fields for 'Rental Location Code' (EAST), 'Temporary Location' (blank), 'Depreciation Book Code' (COMPANY), 'Posting Group' (EQUIPMENT), 'Depreciation Method' (Straight-Line), and 'Depreciation Starting Date' (marked with a red asterisk). The 'Depreciation Book' tab is highlighted with a red box.

The Depreciation Book tab, must be completed on the assets created, for the Depreciation Book, Posting Group and Depreciation Method specified on the Configuration template.

The following demonstrates the opening and review of the Rental Unit from the asset card.

Click on the field **Rental Unit No.**

The screenshot shows a web interface with a search bar containing '11/6/2020'. Below the search bar, there is a 'Show less' link. A table lists items, with the 'Rental Unit No.' field highlighted by a red box and showing the value 'RU00030-001'. Below the table, there is a 'Show less' link and a value '200.00'.



Click on the link in cell **No.** with the value **RU00030-001**

Click on the field **Location Code**

The Rental Location is populated with the Transfer To Location specified when processing the transfer.

The Gen. Product Posting Group and Tax Group Code defaulted from the Rental Unit Group card settings.

Click on the field **Gen. Prod. Posting Group**

Click on the field **Tax Group Code**



Click on the field **Group No.**

g Group RETAIL Tax Group Co

..... ☐ Group Qty. To

..... RU00030 Group Qty. O

..... ☐ Group Qty. To

ng ☐ On Rent ...

le DAY-PEND On Rent Doc.

Duration 1 day Reservations

Click on the field **Link Code**

The Link Code field contains the Fixed Asset No. that is linked to the Rental Unit.

ading 0.00

ng 0.00

habled ☐

..... RU00030-001

2.8.10.4. Method

How to Transfer Serialized Items with Specific Costing

The following example demonstrates the process of transferring serialized items that have a Costing Method of Specific to Fixed Assets, and creating Rental Units which will have the assets linked to.

Click on the navigation menu item **Items**

mic 365 Business Central

CRONUS Rentals, Inc. | Rentals ▾ Finance ▾ Cash Man

Customers Vendors **Items** Bank Accounts Chart of Accounts

INSIGHT FROM LAST WEEK

The best-selling item was
SYDNEY Swivel Chair, gr
with 8 units sold

Click on the link in cell **No.** with the value **1004**

No. ↑	Description	Type
1000	Portable Generators	Inventory
1001	Wacker Hammer Drill Bits 1/2 inch	Inventory
1002	Wacker Hammer Drill Bits 3-Flat 1 inch	Inventory
1003	Air Impact Wrench, 1 in.	Inventory
1004	Air Impact Wrench, 1/2 inch	Inventory
1896-S	ATHENS Desk	Inventory
1900-S	PARIS Guest Chair, black	Inventory
1906-S	ATHENS Mobile Pedestal	Inventory
1908-S	LONDON Swivel Chair, blue	Inventory



ODT Rentals Online Help

Click on the toggle field Allow Rental Transfer

is Posted to G/L ☐

ial Purch. Prices & Discounts [Create New...](#)

ntal

v Rental Transfer ☒

ult Rental Unit FA Template

ces & Sales >

Click on the field Default Rental Unit FA Template

nts [Create New...](#)

..... ☒

e

Click on the link in cell Code with the value FA99999

al Transfer ☒

ntal Unit FA Template

Sales >

Code ↑	Description
→ FA99999	Fixed Asset Template - Ren
+ New	

hment >

J >

Click on the field Rental Unit Group No.

a

.....

5,000.00



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00031**

nit Group No.		
No. 1	Description	Re Co
RU00025	Wacker Hammer Drill Group	M
RU00028	Wacker Skid - Pallet Fork Group	
RU00029	Wacker Skid Steer - Utility Fork...	
RU00030	Portable Generators	Da
RU00031	Air Impact Wrenches 1/2 Inch	M

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

ITEM CARD | WORK DATE: 4/6/2020

1004 · Air Impact Wrench, 1/2 inch

Process

ItemHistorySpecial Sales...es & DiscountsRequest Approval

Indirect Cost %

Last Direct Cost

Net Invoiced Qty.

Cost is Adjusted

Click on the navigation menu item **Inventory Transfer to Rental**

Dynamics 365 Business Central

ITEM CARD | WORK DATE: 4/6/2020

1004 · Air Impact Wrench, 1/2 inch

Process

ItemHistorySpecial Sales...es & DiscountsRequest Approval

Inventory Transfer to Rental

Item JournalItem Reclassification Jour

Last Direct Cost

Net Invoiced Qty.

Cost is Adjusted

Click on the field **Qty To Transfer**

1004 · AIR IMPACT WRENCH, 1/2 INCH

1004

Air Impact Wrench, 1/2 inch

RU00031



ODT Rentals Online Help

Enter the text **2**.

1004 - AIR IMPACT WRENCH, 1/2 INCH

1004
Air Impact Wrench, 1/2 inch
RU00031
<input type="text"/>

Click on the field **Transfer From Location**

Sandbox

<input type="text"/>
<input type="text"/>
<input checked="" type="checkbox"/>
<input type="text"/>

Click on the link in cell **Code** with the value **EAST**

m Location	<input type="text"/>																					
Location	400.00																					
Unit No. Series	<table><tr><td>→</td><td>CENTRAL</td><td>Central Warehouse</td></tr><tr><td></td><td>EAST</td><td>East Warehouse</td></tr><tr><td></td><td>MAIN</td><td>Main Warehouse</td></tr><tr><td></td><td>OUT. LOG.</td><td>Outsourced Logistics</td></tr><tr><td></td><td>OWN LOG.</td><td>Own Logistics</td></tr><tr><td></td><td>RENT LOG.</td><td>Rental Transfer</td></tr><tr><td></td><td>+ New</td><td></td></tr></table>	→	CENTRAL	Central Warehouse		EAST	East Warehouse		MAIN	Main Warehouse		OUT. LOG.	Outsourced Logistics		OWN LOG.	Own Logistics		RENT LOG.	Rental Transfer		+ New	
→	CENTRAL	Central Warehouse																				
	EAST	East Warehouse																				
	MAIN	Main Warehouse																				
	OUT. LOG.	Outsourced Logistics																				
	OWN LOG.	Own Logistics																				
	RENT LOG.	Rental Transfer																				
	+ New																					

Click on the field **Transfer To Location**

<input type="text"/>
<input type="text"/>
<input checked="" type="checkbox"/>
<input type="text"/>

Should there be a specific numbering to be used, then the Use Rental Unit No. Series will need to be disabled and a Starting No. entered.

If the Rental Unit No. Series is to be used, then just click on OK.



ODT Rentals Online Help

Click on the toggle field Use Rental Unit No. Series

Transfer From Location EAST

Transfer To Location EAST

Use Rental Unit No. Series ☒

Starting No.

Click on the field **Starting No.**

Transfer From Location EAST

Transfer To Location EAST

Use Rental Unit No. Series ☐

Starting No.

OK Cancel

Enter the text **RU00031-001**.

Transfer From Location EAST

Transfer To Location EAST

Use Rental Unit No. Series ☐

Starting No.

100.00
rental unit

OK Cancel

Click on the button **OK**

Transfer From Location EAST

Transfer To Location EAST

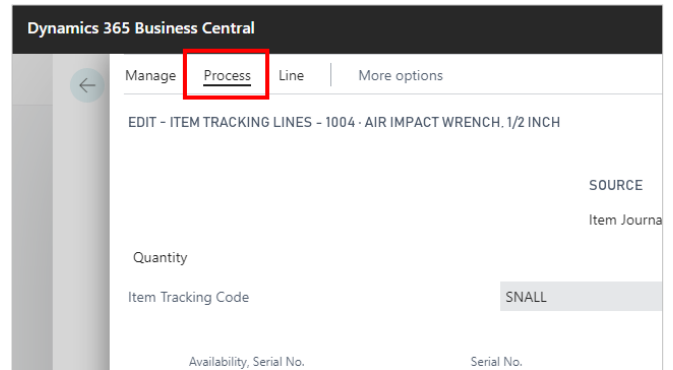
Use Rental Unit No. Series ☐

Starting No. RU00031-001

OK Cancel

RU00031

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central

Manage **Process** Line More options

EDIT - ITEM TRACKING LINES - 1004 - AIR IMPACT WRENCH, 1/2 INCH

SOURCE

Item Journal

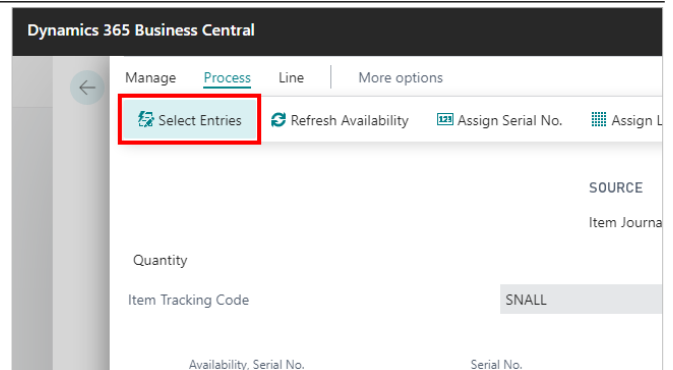
Quantity

Item Tracking Code

SNALL

Availability, Serial No. Serial No.

Click on the navigation menu item **Select Entries**



Dynamics 365 Business Central

Manage **Select Entries** Line More options

Refresh Availability Assign Serial No. Assign L

SOURCE

Item Journal

Quantity

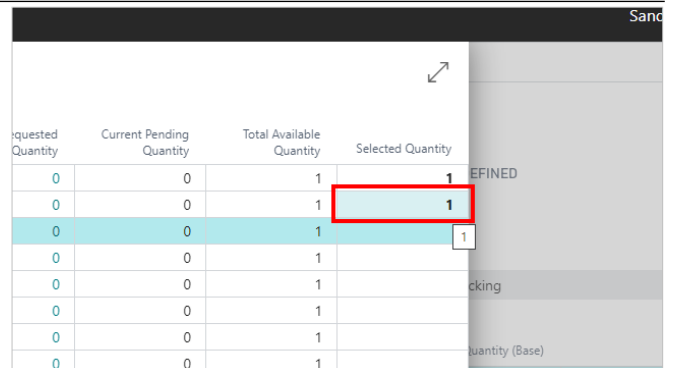
Item Tracking Code

SNALL

Availability, Serial No. Serial No.

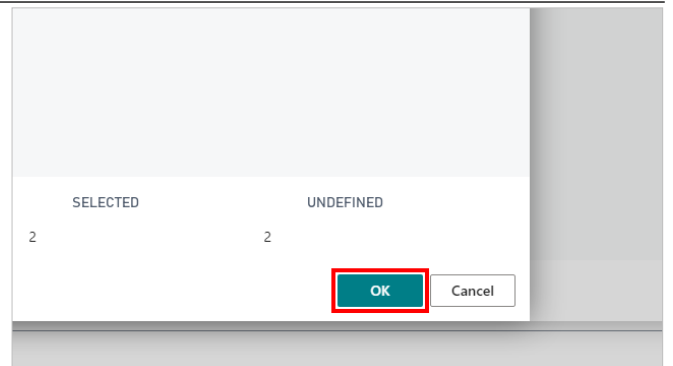
Click on the cell **Selected Quantity** with the value 1

The Serial No. lines that have the Selected Quantity populated can be cleared and then on the applicable Serial No. lines populate the Selected Quantity field.



Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity
0	0	1	1
0	0	1	1
0	0	1	1
0	0	1	1
0	0	1	1
0	0	1	1
0	0	1	1
0	0	1	1

Click on the button **OK**



SELECTED

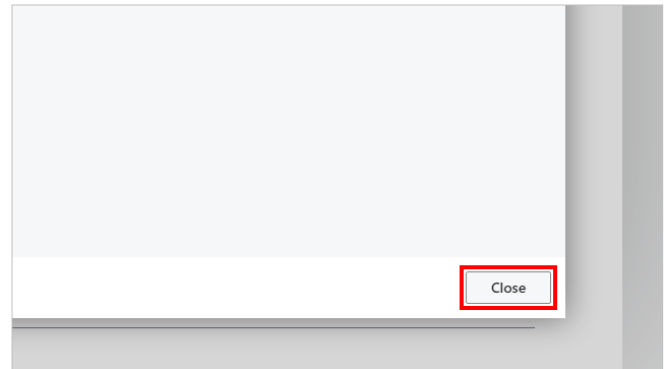
UNDEFINED

2 2

OK Cancel

Alternatively the individual Serial Nos. can be selected on the lines.

Click on the button **Close**



The Fixed Asset cards will require the Depreciation tab configuration to be completed.

2.8.11. How to Add Rental Prices to a Rental Unit

2.8.11.1. Overview

The setup to rental pricing is similar to the structure of your regular inventory pricing items. The price records can be date-sensitive, meaning that you can set new prices up ahead of time if you know when they will become effective.

New rental quotes and contracts will automatically pick up the new prices based on the document dates. Whereas the prices in existing rental documents remain the same for invoicing, even if they span over a price change.

Prices are unique depending on the combination of the rental terms code, Sales Type, Sales Code, Currency Code, and the effective dates.

Taking advantage of the power and flexibility of rental unit groups can only benefit your work flow. Groups enables you to make one change that will affect many units.

This is because group units are parent entities. The theory behind this is that the linked units are child entities and group units are the parent entity. This means, like any family, all traits such as prices are inherited from the parent and passed down to the children.

From this perspective, it is obviously easier to update all the price rates from one place on a group as opposed to drilling-down into each product in your rental fleet.

However, should a unit assigned to a group require different pricing, then prices can be added to the child unit. When prices are specified on a child unit, these prices will take precedence over the prices that are setup on the unit group.

This also aids with regular administrative upkeep such as updating price changes and adding promotions.

When creating a new price card, which has alternative rental terms, on entering or modifying the Tax Group Code and enabling or disabling the Damage Waiver Billing or the Additional Fee Billing on the price card, a confirmation message will be displayed. When Yes is selected the alternative term price cards will be updated to be the same as the entered or modified selection.

ODT Rentals provides the ability to setup the prices in both local and foreign currency and for the various Sales Types and Code combinations for the same rental term.

2.8.11.2. Rental Price Cards Fields

GENERAL TAB - Mandatory Fields

- **Rental Terms Code:** The value selected in this field is for the setting up the price that will be billed each period for this rental term.



ODT Rentals Online Help

- **Sales Type:** A Sales Type must be specified. The default is All Customers.
- **Sales Code:** This field is not required when the Sales Type is All Customers. Should the Sales Type be changed to Customer, Customer Sales Group or Campaign, then this field becomes mandatory.
- **Price:** The value set for the rental term specific to the rental unit. This value can vary depending how the Rental Terms Code and the Dates are combined.
- **Tax Group Code:** The Tax Group Code selected specifies the tax group that is used to calculate the sales tax on rental quotes and contracts and post sales tax when invoicing the rental contract. The Tax Group Code on the price card will default to the rental quote/contract rental lines and takes priority over the Tax Group Code on the rental unit card.

Optional Setups:

GENERAL TAB

Rentals provides the ability to specify pricing which is valid between a Starting Date and an Ending Date. This setup can be used for all prices for tracking pricing and enables setting up when prices are to increase in advance or can be used for promotion sales pricing.

- **Currency Code:** A code can be used to setup a specific price with foreign currency amounts when the organization has foreign customers. This setup is not mandatory, as when on a quote or contract the customer selected has a foreign Currency Code specified, the local price will be converted to the customers' currency automatically.
- **Starting Date:** The date entered in this field specifies the date on which the pricing becomes effective.
- **Ending Date:** The date entered in this field specifies the date on which the pricing ends.

METERED USAGE TAB

The configuration of this tab is to be completed when an organization is billing metered usage on their rental product. The setup of a price card, when billing metered usage is mandatory. This tab is not to be configured when tracking metered usage for maintenance purposes only.

To learn about using Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

PERIODIC USAGE TAB

The configuration of this tab can be completed, when an organization is billing using the Periodic Usage and Standby Charges feature. However, the setup of the price card is not mandatory, as periodic usage and standby charge pricing can be entered directly on the rental line.

To learn about using the Periodic Usage and Standby Charges feature, see the ODT Rental Online help, Additional Rental Processes, Periodic Usage and Standby Charges.

DAMAGE WAIVER TAB

This tab is optional and can be used to specify a damage waiver fee to be billed to the customer each rental period. The fee can be configured as a unit price or a percentage of the period rental charge or a percentage of rental plus usage charges each period.

- **Damage Waiver Billing:** In order to invoice for Damage Waiver Billing this field must be enabled.
- **Damage Waiver Period Code:** The value selected in this field is used to specify the rental period for the damage waiver price billing.
- **Damage Waiver Unit Price/Pct.:** This field is used to specify whether the damage waiver charge will be



based on a unit price or a percentage.

When Percent is selected, then amount to be billed each rental period for the damage waiver will be calculated by default, as a percentage of the rental charge billed each rental period.

- **Damage Waiver Unit Price:** When Unit Price is selected in the Damage Waiver Unit Price/Pct. field, then this field is used to specify the unit price to be billed each period, based on the Damage Waiver Period Code selected. When Percent is selected in the Damage Waiver Unit Price/Pct. field, then this field cannot be populated.
- **Damage Waiver Pct.:** When Percent is selected in the Damage Waiver Unit Price/Pct. field, then specify the percentage on which the damage waiver will be used in calculating the amount to be billed each period, based on the Damage Waiver Period Code selected. When Unit Price is selected in the Damage Waiver Unit Price/Pct. field, then this field cannot be populated.
- **Damage Waiver Pct. Incl. Usage:** This field is available to modify the setting when the Damage Waiver Unit Price/Pct. field has Percent selected. When enabled, then the Damage Waiver amount will be calculated based on the sum of the rental charge, metered usage charges, periodic usage charges and standby charges, which are due to be billed, when invoicing a contract.
- **Damage Waiver Allow Line Disc.:** If checked, and for the rental unit entered on the rental line a Line Discount percentage is entered, the discount percentage will be applied to the Damage Waiver unit price.
- **Damage Waiver Tax Group Code:** The Tax Group Code entered on the General tab will default to this field and can be overridden, if desired. The Tax Group Code in this field specifies the tax group that is used to calculate the sales tax on the rental quote and contract and post sales tax for the Damage Waiver fee when invoicing the contract.

ADDITIONAL FEE TAB

This tab is optional and can be used to specify an additional fee to be billed to the customer each rental period. The fee can be configured as a unit price or a percentage of the period rental charge or a percentage of rental plus usage charges each period.

The tab contains fields for setup that are the same as the Damage Waiver tab, therefore the explanation of the fields will not be repeated.

The Additional Fee pricing feature provides the flexibility to define the name for the Additional Fee.

When an Additional Fee name is defined, then that name will be displayed in the name of the fields within the Additional Fee tab.

The defined name will print on the Rental Quote, Rental Contract, Proforma Invoice, Advanced Proforma Invoice and Posted Rental Invoice. Therefore it is suggested that the name be a short name or abbreviated name in order to fully print on the documents.

The Rental Amount Lines and the Rental Values will display the Type as the name specified on Rental Management Setup.

When a name is not specified, then the Type will display as Additional Fee.

The Rental Unit, Rental Statistics the related revenue caption for the Additional Fee setup will display the caption with the name setup on Rental Management Setup.

When a name is not specified, then the Type will display as Additional Fee Revenue.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, in a United States

company. Therefore, the help refers to Tax Group Code.

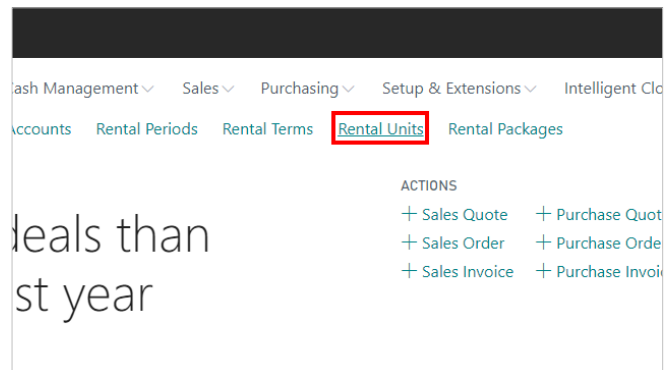
Should your organization be using the Rest of World version of Microsoft Dynamics 365 Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

2.8.11.3. Steps to Add Rental Prices to a Rental Unit

Profile - Business Manager

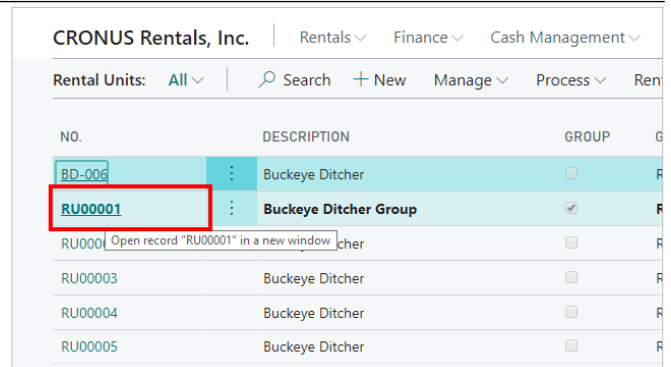
This setup can be done using the Sales Order Processor profile as well.

Click on the navigation menu item **Rental Units**

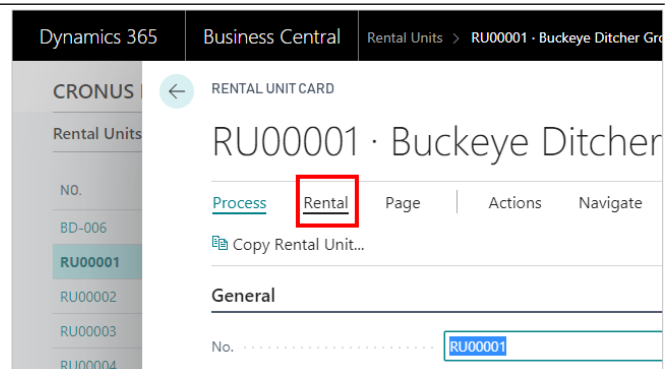


Click on the link in cell **No.** with the value **RU00001**

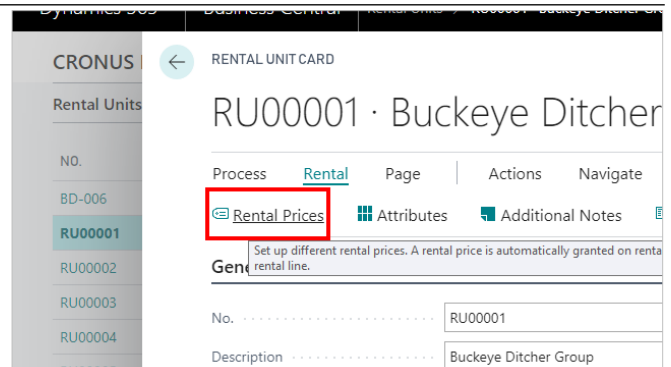
Select the Rental Unit Group or Rental Unit you wish to setup a rental price for.



Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Prices**



Click on the navigation menu item **New**

The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'Dynamics 365', 'Business Central', and a breadcrumb trail 'Rental Units > RU00001 · Buckeye Ditcher Group'. The left-hand navigation pane lists various entities: 'CR', 'Rental Units', 'NO', 'BD', 'RU', 'RU', 'RU', and 'RU'. The main content area is titled 'RU00001 · BUCKEYE DITCHER GROUP' and 'Rental Price List'. Below the title, there are three action buttons: 'Search', 'New' (highlighted with a red box), and 'Manage'. To the right of these buttons is a link 'Open in Excel' with an Excel icon. Below the buttons is a text box containing 'Create a new entry.'. At the bottom, there is a table header with three columns: 'RENTAL TERMS CODE', 'PERIOD CODE', and 'STARTING DATE'.

The Rental Price list provides filtering fields to filter the price list once the prices once setup.
Click on the filtering field caption for information on the field.
Click on **the filtering options**

Rental Price List

Search

New

Edit List

Delete

Edit

View

General

Rental Term Filter

Starting

Sales Type Filter

None

Current

Sales Code Filter

Click on the link **New**

ENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00001 - BUCKEYE DITCHER GROUP | WORK DATE: 4/8/2019

Rental Price List

Search + New Edit List Delete Edit

Create a new entry.

General

Rental Term Filter

Sales Type Filter None

Click on the field **Rental Terms Code, (Blank)**

Click on the Rental Term Code for which the rental price is being setup for.

[illegible]



Click on **Code = MONTH-PEND, Description = Monthly Rental - Per. Billing in Arrears**

The screenshot shows a dropdown menu for the 'Rental Terms Code' field. The menu is open, displaying a list of codes and their descriptions. The 'MONTH-PEND' code is highlighted with a red box. The description for 'MONTH-PEND' is 'Monthly Rental - Per. Billing in Arrears'. Other visible codes include 'MONTH-END-OPT-TL...', 'MONTH-END-PRORATE', 'MONTH-START', and 'MONTH-START EARLY'.

Click on the field **Sales Type**

By default, the Sales Type is set to All Customers. This can be changed for setting up special prices for rentals. This feature works the same as the Item Special Prices.

The screenshot shows the 'General' tab of the 'RU00001' rental term. The 'Sales Type' dropdown menu is open, and 'All Customers' is selected, highlighted with a red box. The 'Rental Terms Code' is set to 'MONTH-PEND'.

Click on the field **Sales Code**

When the Sales Type selection is All Customers, then the Sales Code field cannot be edited.

The screenshot shows the 'General' tab of the 'RU00001' rental term. The 'Sales Type' is set to 'All Customers'. The 'Sales Code' field is highlighted with a red box, indicating it is not editable. The 'Rental Terms Code' is set to 'MONTH-PEND'.

Click on the field **Currency Code**

The screenshot shows the 'General' tab of the 'RU00001' rental term. The 'Currency Code' field is highlighted with a red box. The 'Rental Terms Code' is set to 'MONTH-PEND'.

Should the organization have Customers to be billed in a foreign currency, then multiple price cards can be configured with a price to be charged in the foreign currency.

This is not mandatory.

Rental Prices will automatically be converted using the Currency Exchange Rates from the price card that does not have a Currency Code specified for the applicable rental term.

Should the organization not want the prices to be automatically converted using the current Currency Exchange Rates, then multiple price cards will be required.

One for local currency with the Currency Code field left blank. And then other cards for the same Rental Term



ODT Rentals Online Help

with the Currency Code specified for each foreign currency that the rental may require.

Click on the field **Price**

Enter the price to be billed per rental period for the selected Rental Term and Currency Code, if selected.

When entering a price when a Currency Code has been selected, then the price to be entered is to be the amount converted from the local currency.

By default, the Allow Line Disc. field is checked.

Should Line Discounts not be allowed for Damage Waivers for this unit group or unit, then set the field to No by clicking on it.

Click on the field **Tax Group Code, (Blank)**

Click on **Code = SUPPLIES, Description = Taxable Olympic Supplies**

Select the Tax Group Code that is to be used to calculate and post sales tax when renting this unit.

Damage Waivers:

If Damage Waivers are to be billed, complete the Damage Waiver tab. The Rental Price card setup is mandatory for Damage Waivers.

Damage Waiver pricing per rental period can be either a unit price or be a percentage of the rental price that is billed each rental period.

The following demonstrates the configuration of Damage Waiver pricing based on a unit price.



ODT Rentals Online Help

Click on **Damage Waiver Billing**

By default, the field is not enabled. Clicking on the field will enable Damage Waivers. When enabled, price calculation, documents and invoicing will include billings for Damage Waivers

..... 500.00 Re

..... Never

..... ☐

ode ▾ Da

e 0.00 Da

Click on the field **Damage Waiver Period Code, (Blank)**

..... Never

..... ☒

ode ▾ Da

e 0.00 Da

Click on **Code = MONTH, Description = Month**

Damage Waiver Unit Price

CODE	DESCRIPTION
28D	28 Days
2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Day
MONTH	Month

+ NEW Select record "MONTH"

Click on the field **Damage Waiver Unit Price/Pct.**

MONTH-
→ MONTH-
MONTH-
MONTH-
MONTH-
MONTH-
MONTH-
WEEK-EN
WEEK-EN
WEEK-PE

Period Usage /

Damage Waiver

Damage Waiver Billing ☒ Damage V

Damage Waiver Perio... MONTH ▾ Damage V

Damage Waiver Unit ... Unit Price ▾ Damage V

Damage Waiver Unit ... Unit Price 0.00 Damage V



ODT Rentals Online Help

Click on the item **Unit Price** in the list

Click on the field **Damage Waiver Unit Price**

Enter the text **50.00**.

By default, the Damage Waiver Allow Line Disc. field is automatically set to the same setting as on the field, Allow Line Disc., on the General tab.

Should Line Discounts not be allowed for Damage Waivers on this unit group or unit, then to set the field to No, click on the field, Damage Waiver Allow Line Disc..

Click on the field **Damage Waiver Tax Group Code**

The Tax Group code specified on the General tab defaults to the Damage Waiver Tax Group Code.

Should the Tax Group be different for Damage Waivers, then look up and select the applicable Tax Group Code. This Tax Group Code for Damage Waivers will default to the Rental Amount Lines.

The following demonstrates the configuration of Damage Waiver billing based on a percentage of only the rental price, each rental period.



Click on the toggle field Damage Waiver Billing

metered Usage >

Periodic Usage >

Damage Waiver

Damage Waiver Billing ☐

Damage Waiver Perio...

Damage Waiver Unit ... Unit Price

Damage Waiver Unit ... 0.00

Click on the field Damage Waiver Period Code

Periodic Usage >

Damage Waiver

Damage Waiver Billing ☒

Damage Waiver Perio...

Damage Waiver Unit ... Unit Price Look up value

Damage Waiver Unit ... 0.00

Click on the link in cell Code with the value MONTH

Damage Waiver Billing ☒

Damage Waiver Perio...

Damage Waiver Unit ...

Damage Waiver Unit ...

Code ↑	Description
→ 2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
+ New	

Click on the field Damage Waiver Unit Price/Pct.

Periodic Usage >

Damage Waiver

Damage Waiver Billing ☒

Damage Waiver Perio... MONTH

Damage Waiver Unit ... Unit Price

Damage Waiver Unit ... Unit Price .00



Click on the item **Percent** in the list

Click on the field **Damage Waiver Pct.**

Enter the text **10**.

Click on the link **Damage Waiver Pct. Incl. Usage**

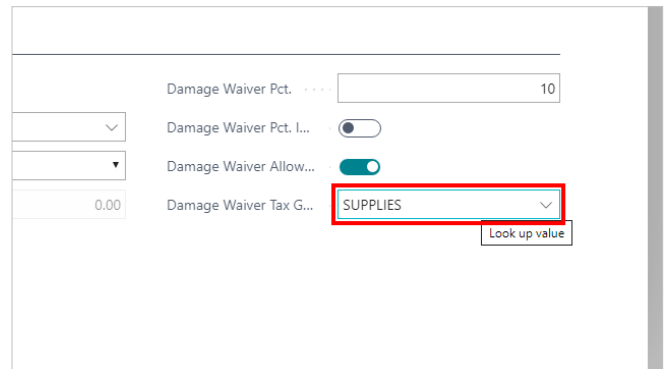
The Damage Waiver Pct. Incl Usage field is only to be enabled when using Metered Usage pricing and/or Periodic Usage and Standby Charges.

For more information on this field, see ODT Rental Online Help, Additional Rental Processes and review the Metered Usage, and/or, Periodic Usage and Standby Charges.

By default, the Damage Waiver Allow Line Disc. field is automatically set to the same setting as on the field, Allow Line Disc., on the General tab.

Should Line Discounts not be allowed for Damage Waivers on this unit group or unit, then to set the field to No, click on the field, Damage Waiver Allow Line Disc..

Click on the field **Damage Waiver Tax Group Code**



The screenshot shows a form with several fields. The 'Damage Waiver Tax G...' field is highlighted with a red box and contains the value 'SUPPLIES'. A 'Look up value' button is visible next to it.

Additional Fee Pricing Setup

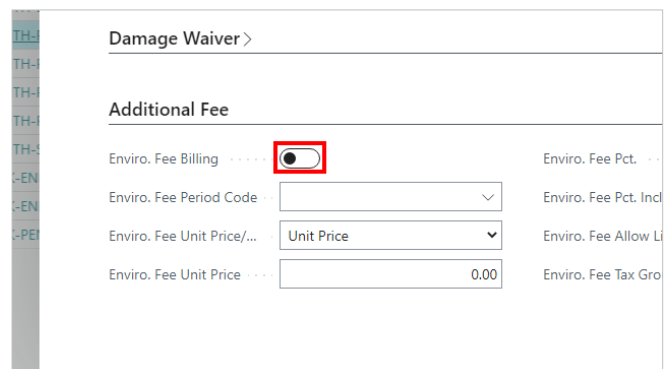
For this example, on Rental Management Setup, Additional Fee Name field, the name of Enviro. Fee has been specified to demonstrate the field naming change on the Rental Price card.

The pricing setup will be based on a percentage of the rental price.

Click on the toggle field Enviro. Fee Billing

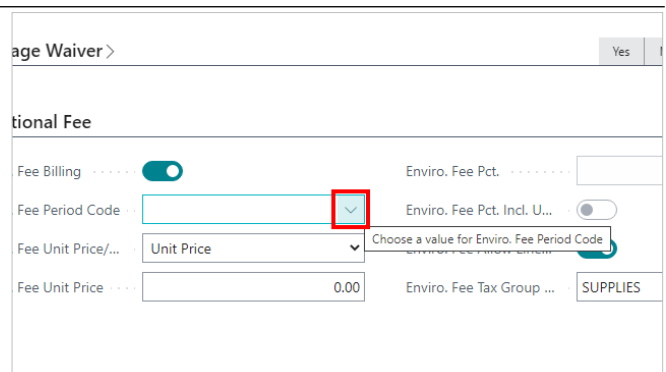
By default, the field is not enabled. Clicking on the field will enable the the billing of the additional fee pricing.

When enabled, price calculation, documents and invoicing will include billings for the additional fee.



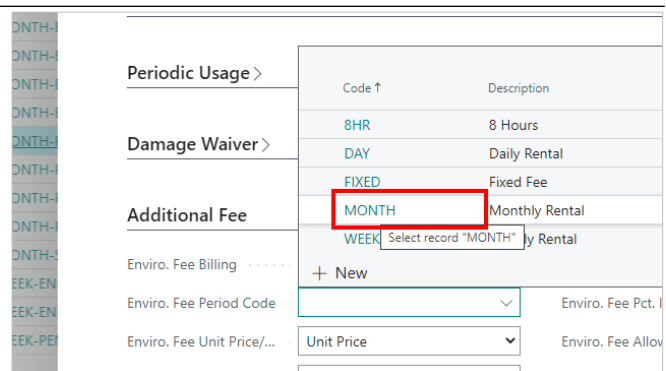
The screenshot shows the 'Enviro. Fee Billing' toggle switch, which is currently turned off. It is highlighted with a red box.

Click on the lookup button **Enviro. Fee Period Code**



The screenshot shows the 'Enviro. Fee Period Code' dropdown menu, which is highlighted with a red box. A 'Choose a value for Enviro. Fee Period Code' button is visible next to it.

Click on the link in cell **Code** with the value **MONTH**



The screenshot shows a table with the following data:

Code	Description
8HR	8 Hours
DAY	Daily Rental
FIXED	Fixed Fee
MONTH	Monthly Rental
WEEK	Weekly Rental

The 'MONTH' row is highlighted with a red box. A 'Select record "MONTH"' button is visible next to it.



Click on the field **Enviro. Fee Unit Price/Pct.**

Damage waiver /

MONTH-
MONTH-
MONTH-
MONTH-
WEEK-EN
WEEK-EN
WEEK-PE

Additional Fee

Enviro. Fee Billing ☒ Enviro. Fe

Enviro. Fee Period Code MONTH Enviro. Fe

Enviro. Fee Unit Price/... Unit Price Enviro. Fe

Enviro. Fee Unit Price ... 0.00 Unit Price Enviro. Fe

Click on the item **Percent** in the list

MONTH-
MONTH-
MONTH-
WEEK-EN
WEEK-EN
WEEK-PE

Additional Fee

Enviro. Fee Billing ☒ Enviro. Fe

Enviro. Fee Period Code MONTH Enviro. Fe

Enviro. Fee Unit Price/... Unit Price Enviro. Fe

Enviro. Fee Unit Price ... Unit Price
Percent Enviro. Fe

Percent

Click on the field **Enviro. Fee Pct.**

No No

Yes MONTH Unit Price

Enviro. Fee Pct. 0

Enviro. Fee Pct. Incl. U... ☐

Enviro. Fee Allow Line... ☒

Enviro. Fee Tax Group ... SUPPLIES

Enter the text **3**.

No No

Yes MONTH Unit Price

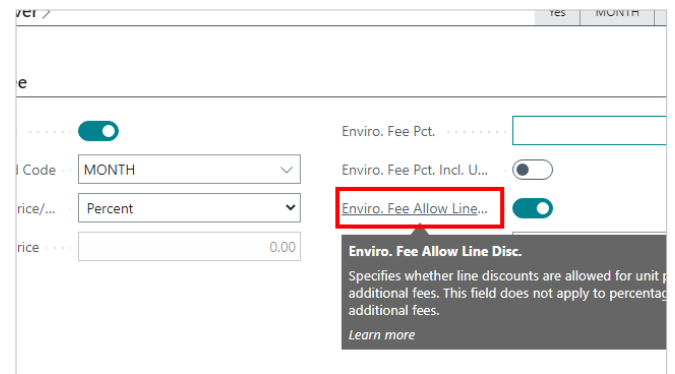
Enviro. Fee Pct. 3

Enviro. Fee Pct. Incl. U... ☐

Enviro. Fee Allow Line... ☒

Enviro. Fee Tax Group ... SUPPLIES

Click on the link **Enviro. Fee Allow Line Disc.**

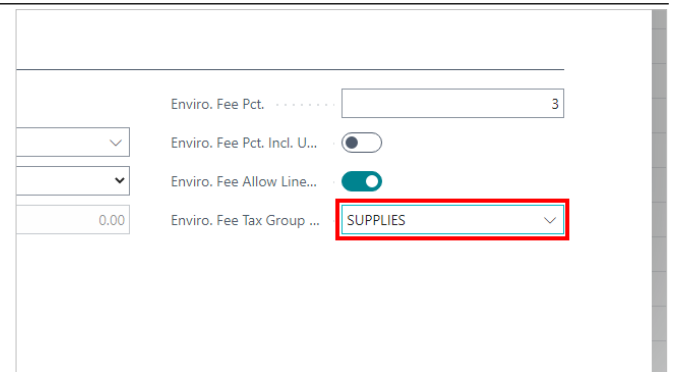


The screenshot shows a form with several fields. The 'Enviro. Fee Allow Line...' field is highlighted with a red box. Below it, a tooltip explains: 'Enviro. Fee Allow Line Disc. Specifies whether line discounts are allowed for unit additional fees. This field does not apply to percentage additional fees. Learn more'.

Click on the field **Enviro. Fee Tax Group Code**

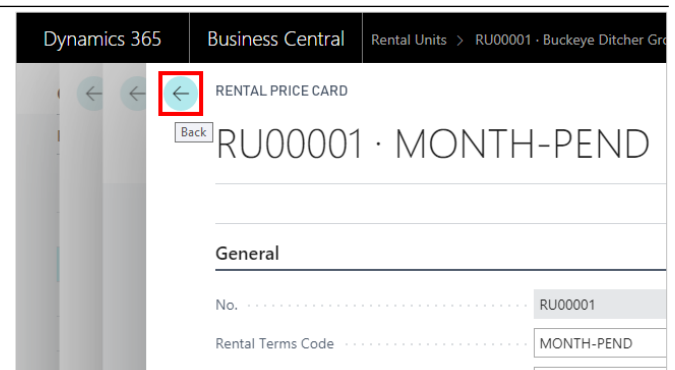
The Tax Group code specified on the General tab defaults to the Enviro. Fee Tax Group Code.

Should the Tax Group be different for the Enviro. Fee, then look up and select the applicable Tax Group Code. This Tax Group Code for Enviro. Fee will default to the Rental Amount Lines.



The screenshot shows the 'Enviro. Fee Tax Group ...' field with a dropdown menu. The 'SUPPLIES' option is selected and highlighted with a red box.

Click on the button **Back**



The screenshot shows a navigation bar with a 'Back' button highlighted by a red box. The page title is 'RENTAL PRICE CARD' and the main content area shows 'RU00001 · MONTH-PEND'.

Repeat the applicable above steps for each pricing schema relevant to the unit group or unit where the Sales Type is set to All Customers.

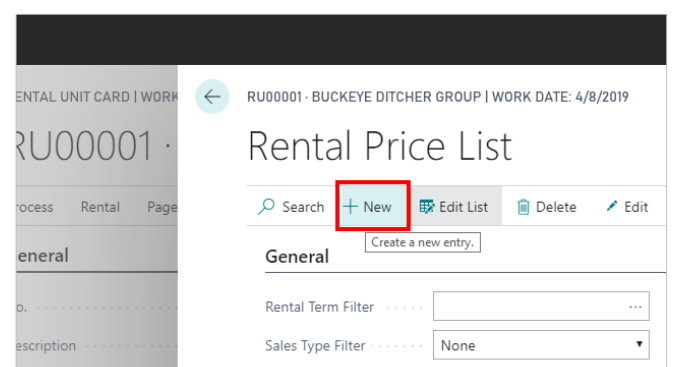
NOTE:

Additional rental prices can as well be created by clicking on the "+" icon at the top of the rental price card.

2.8.11.4. Steps for Setting up Special Prices

The following demonstrates the setup for specifying a special price for a specific customer for the same Rental Term used in the previous example.

Click on the link **New**



The screenshot shows the 'Rental Price List' form. The '+ New' button is highlighted with a red box. The form includes fields for 'Rental Term Filter' and 'Sales Type Filter'.



Click on the field **Rental Terms Code**

Rental Terms Code RU00001

General

No. RU00001 Price

Rental Terms Code

Sales Type All Customers Optimize

Sales Code Allow Line

Currency Code Tax Group

Starting Date Rental Ter

Click on **Code = MONTH-PEND, Description = Monthly Rental - Per. Billing in Arrears**

Rental Terms Code RU00001 Price

Rental Terms Code

Sales Type Optimize

Sales Code Allow Line

Currency Code Tax Group

Starting Date Rental Ter

Ending Date Rental Ter

CODE	DESCRIPTION
MONTH-END-OPT-TL...	Monthly Rental for Optim
MONTH-END-PRORATE	Monthly Rental for Prorate
MONTH-PEND	Monthly Rental - Per. Billi
MONTH-PEND	Select record "MONTH-PEND" - Early Pe
MONTH-PSTART	Monthly Rental - Per. Billi
MONTH-PSTART	Monthly Rental - Per. Billi

+ New

Damage Waiver

Click on the field **Sales Type**

Rental Terms Code RU00001 MONTH-PEND Price

Rental Terms Code MONTH-PEND Optimize

Sales Type All Customers Prorate

Sales Code All Customers Line

Currency Code Tax Group

Starting Date Rental Ter

Ending Date Rental Ter

Click on the item **Customer** in the list

The Sales Type of Customer Sales Group and Campaign are as well available to setup rental prices based on these options.

Rental Terms Code RU00001 MONTH-PEND Price

Rental Terms Code MONTH-PEND Optimize

Sales Type All Customers Prorate

Sales Code Customer Customer Price Group Allow Line

Currency Code Customer Tax Group

Starting Date Rental Ter

Ending Date Rental Ter



ODT Rentals Online Help

Click on the lookup button **Look up value**

Form fields and controls:

- RU00001
- Price
- Terms Code: MONTH-PEND
- Optimize: Never
- Type: Customer
- Prorate: Never
- Code: [dropdown arrow]
- Allow Line Disc. [toggle]
- Look up value [button]
- Group Code
- g Date
- Rental Terms Code Alt1
- g Date
- Rental Terms Code Alt2

Click on **No. = 40000, Name = Alpine Ski House, ZIP Code = 31772**

Form fields and controls:

- Sales Code
- Allow Line Dis
- Currency Code
- Starting Date
- Ending Date
- Damage Waiver
- Damage Waiver Billing
- Damage Waiver Billing
- Damage Waiver Perio...
- Damage Waiver Unit ...

NO.	NAME	CT
10000	Adatum Corporation	
20000	Trey Research	
30000	School of Fine Art	
40000	Alpine Ski House	
500 Select record "40000"		

Click on the field **Price**

Form fields and controls:

- TH-PEND
- Price: 0.00
- Optimize: Never
- Prorate: Never
- Allow Line Disc. [toggle]
- Tax Group Code

Enter the text **450.00**.

Form fields and controls:

- TH-PEND
- Price: 4
- Optimize: Never
- Prorate: Never
- Allow Line Disc. [toggle]
- Tax Group Code



Click on the field **Tax Group Code**

Price 450.00

▼

Optimize Never

▼

Prorate Never

▼

Allow Line Disc. ☒

▼

Tax Group Code

📅

Rental Terms Code Alt1 ...

📅

Rental Terms Code Alt2 ...

Click on **Code = SUPPLIES**, Description = Taxable Olympic Supplies

📅 Rental Terms Code Alt1 ...

📅 Rental Terms Code Alt2 ...

CODE	DESCRIPTION
FURNITURE	Taxable Olympic Furniture
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supplies
+ New	

▼

Damage Waiver Allow...

0.00

Damage Waiver Tax G...

Click on **Damage Waiver Billing, No**

RENTAL TERMS CODE

MONTH-P

MONTH-P

Starting Date 📅

Ending Date 📅

Damage Waiver Billing ... ☒

Damage Waiver Perio... .. ▼

Damage Waiver Unit 0.00

Click on the field **Damage Waiver Period Code**

RENTAL TERMS CODE

MONTH-P

MONTH-P

Ending Date 📅

Damage Waiver Billing ... ☒

Damage Waiver Perio... ..

Damage Waiver Unit 0.00



Click on **Code = MONTH**, **Description = Month**

Click on the field **Damage Waiver Unit Price**

Enter the text **45.00**.

Click on the back button

2.8.12. How to Set a Service Status on a Rental Unit

2.8.12.1. Overview

The Service Status with Reservations feature provides the ability to specify a Service Status on a Rental Unit card, which will create a Reservation Entry on a unit when it will not be available to rent. No Reservation Entry is created when the unit is still available to rent out.

Options include:



- 1. Blank
- 2. Needs Service – Available for Rent
- 3. Needs Service – Unavailable for Rent
- 4. In Service – Unavailable for Rent
- 5. In Service – Available for Rent
- 6. Expired
- 7. Reserved

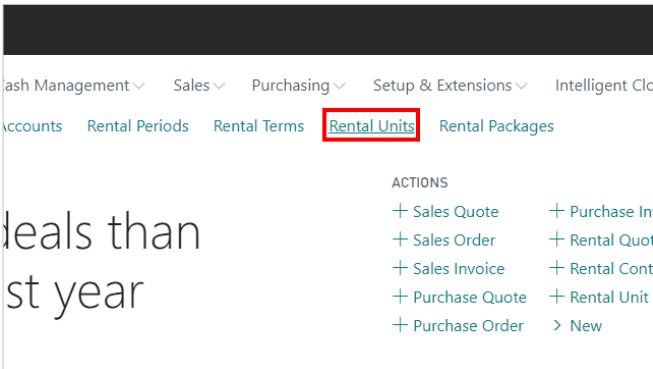
For information on the options, please see ODT Rentals Online Help, Setup Rentals, Setup Rental Units, Rental Units Overview.

When a Service Status has been selected for options of Needs Service – Unavailable for Rental, In Service – Unavailable for Rent or Reserved, then even when Allow Unit Overbooking or the Rental Unit Group the unit is assigned to has Allow Overbooking, then the Reservations are checked. The unit will not be able to be added to rental lines of either quote or contract.

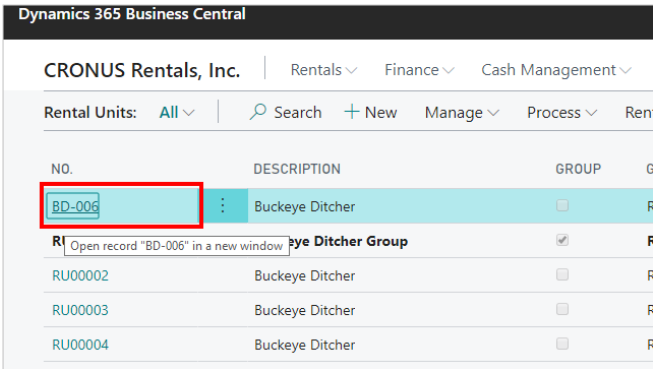
When the Service Status of Expired has been selected, the system will automatically check the Inactive field on the unit card. The unit will no longer be available to rent.

2.8.12.2. How to Set the Service Status on a Rental Unit

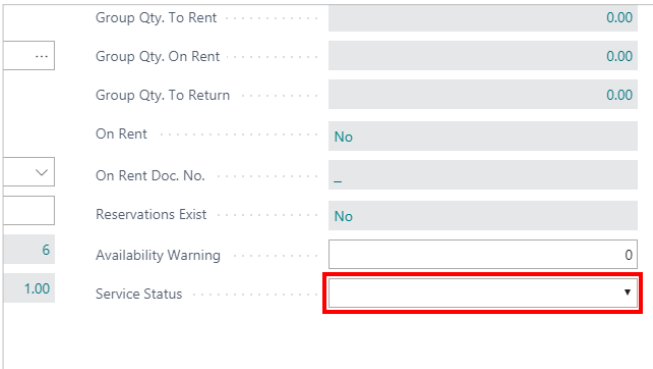
Click on the navigation menu item **Rental Units**



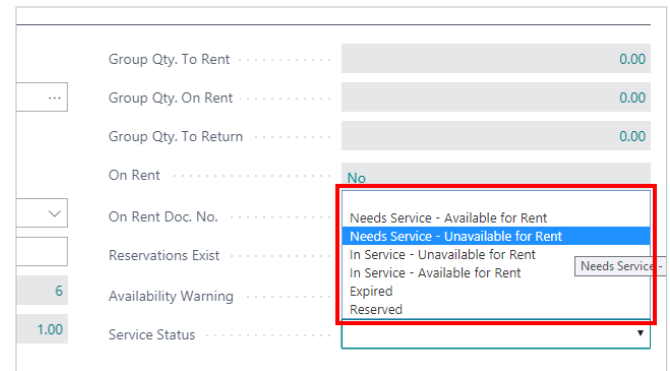
Click on the link in cell **No.** with the value **BD-006**



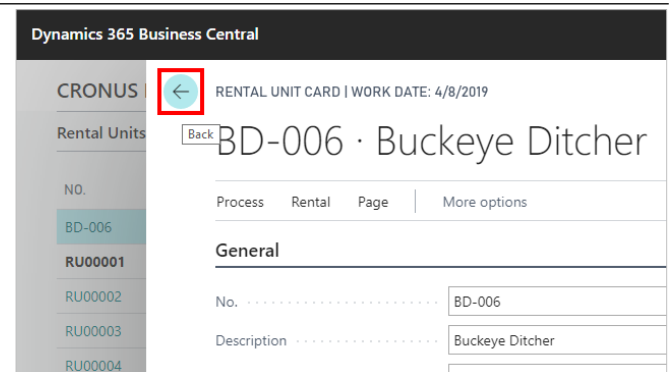
Click on the field **Service Status**



Click on the item **Needs Service - Unavailable for Rent** in the list



Click on the back button



2.8.13. How to Add Rental Units to My Rental Units

2.8.13.1. Overview

On the Home Role Center for the Business Manager and the Sales Order Processor roles, the My Rental Units list part has been added.

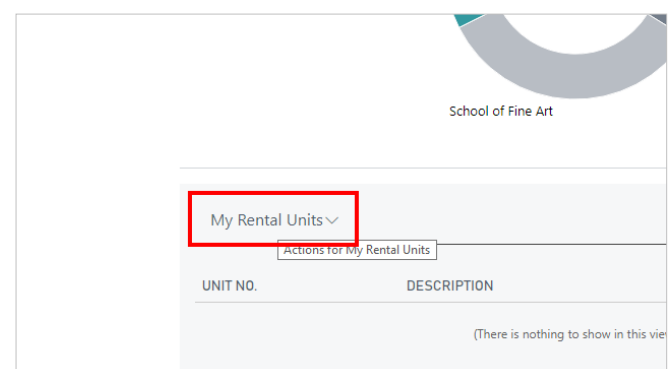
The My Rental Units list part provides users with the ability to add Rental Units to the list and quickly open the Rental Unit from the list.

2.8.13.2. Steps to Add Rental Units to the Rental Units List Part

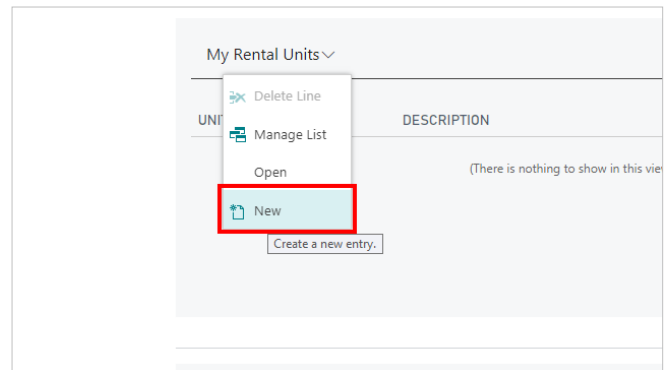
Profile - Business Manager

The same steps apply to the Sales Order Processor Profile.

Click on the link **My Rental Units**



Click on the menu item **New**

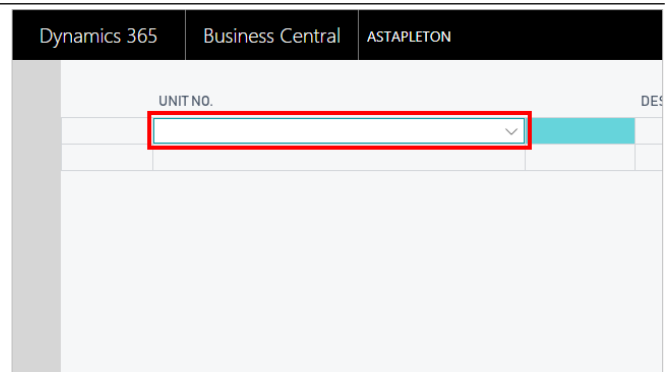


My Rental Units ▾

- Delete Line
- Manage List
- Open
- New**

Create a new entry.

Click on the cell **Unit No.**

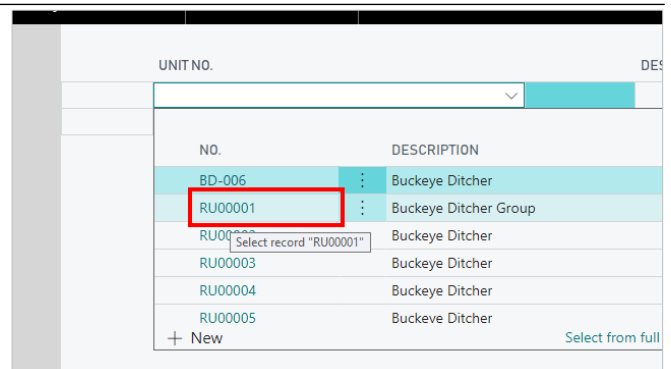


Dynamics 365 Business Central ASTAPLETON

UNIT NO. ▾

Click on **No. = RU00001, Description = Buckeye Ditcher Group**

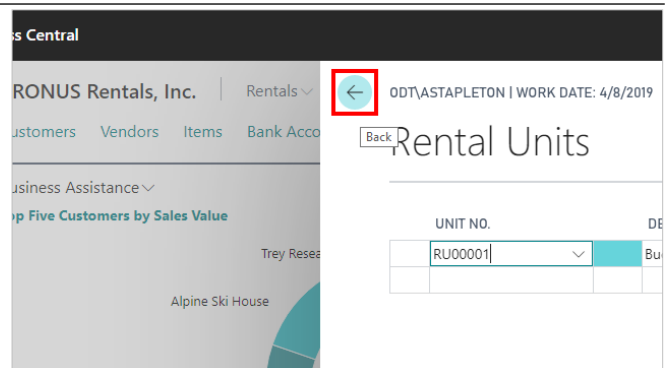
Click on the Rental Unit Group or Rental Unit you wish to add to the list.



UNIT NO. ▾

NO.	DESCRIPTION
BD-006	Buckeye Ditcher
RU00001	Buckeye Ditcher Group
RU00002	Buckeye Ditcher
RU00003	Buckeye Ditcher
RU00004	Buckeye Ditcher
RU00005	Buckeye Ditcher
+ New	Select from full

Click on the back button



Business Central

RONUS Rentals, Inc. | Rentals ▾

Customers Vendors Items Bank Accounts

Business Assistance ▾

Top Five Customers by Sales Value

Trey Reese

Alpine Ski House

ODT\ASTAPLETON | WORK DATE: 4/8/2019

Back Rental Units

UNIT NO. ▾

RU00001 ▾

3. Processing Rentals

3.1. Processing Rentals Overview

3.1.1. Introduction to Processing Rentals

3.1.1.1. Overview

You create a rental quote or rental contract to record your agreement with a customer to rent and sell certain

products on certain delivery and payment terms. A default rental term can be assigned to each customer, which will default onto the rental documents.

You can negotiate with the customer by first creating a rental quote, which you can convert to a rental contract when you agree on the rental. After the customer has confirmed the agreement, for example after a quote process, you can send a rental contract confirmation to record your obligation to deliver the products as agreed.

When you post the delivery of the rental unit(s), the related rental ledger entry records are created.

After you post the delivery, the contract can then be invoiced. Invoicing will be dependent upon the invoicing type specified on the rental term.

- When the invoicing type is Start the invoicing occurs at the start of rental contract and bills for the full contract.
- When the invoicing type is End the invoicing occurs at the end of the rental contract when the rental units are returned and bills for the full contract.
- When the invoicing type is Periodic Start, the invoicing of the first rental period occurs at the beginning date of the first rental period. Subsequent invoices must be posted at the beginning of each of the following rental periods, when the rental exceeds one rental period.
- When the invoicing type is Periodic End, the invoicing of the first rental period occurs on the last day of the first rental period. Subsequent invoices must be posted at the end of each of the following rental periods, when the rental exceeds one rental period.

Posting the rental invoice will create the related rental value entries, general ledger, tax ledger and customer ledger entries in your system.

With rentals, the ability to quickly and easily determine the availability of the rental unit group and/or units is paramount.

The Rental App provides a Group Availability Matrix on the Rental Quote and Rental Contract for achieving this. In addition, from the Group Availability Matrix, a Unit Availability Matrix is accessible, which displays the availability of the Rental Units assigned to the group selected on the Group Availability Matrix.

For information on the Group Availability Matrix and the Unit Availability Matrix, see ODT Rental Online Help, Processing Rentals Overview, Group Availability Matrix Overview.

For Rental Units linked to Items, a Rental Inventory Availability matrix is provided that displays the quantity of items available for rent per day when Locations are used for items and rental units.

For information on Rental Inventory Availability, see ODT Rental Online Help, Processing Rentals Overview, Rental Inventory Availability.

These two features are also available from the Business Manager and Sales Order Processor Profiles in the main menu command bar in the Rentals menu option, or from the Actions part, under Rental Management.

3.1.1.2. Sequence of Tasks for Processing Rentals

The following describes the sequence of tasks for processing rentals:

- Create a rental quote, where you offer products on negotiable terms, before converting the quote to a rental contract. This use of rental quotes is optional.
- Create a rental contract to record your agreement with a customer to rent, and sell products on certain delivery and payment terms.
- Pick the rental units, either directly on the contract, or on the To Ship list, which enables warehouse and/or other personnel to pick the units to ship.
- Renting out the Rental Units using Ship Rentals from the Rental Contract.
- Invoicing the customer. Invoicing can only commence after shipping the rental units. Timing of the invoicing



is dependent on whether the billing is at the beginning of the contract or each rental period, or at the end of the contract or end of each rental period. Invoicing can be done from the Rental Contract or batch post invoices from the Rental Invoicing Worksheet.

- Returning the Rental Units. The processing of the return of units can be done directly on the Rental Contract, or can be processed from the To Return list and the Rental Rapid Returns document.

With the feature to link Rental Units, when linked to an Item, then Transfer Orders are automatically created and posted, transferring the item from the rental location back to the location it was rented out from. With the posting of the transfer shipments and receipts, item ledger entries will be created.

To learn about processing Rental Quotes and Rental Contracts, see the ODT Rental Online Help, Processing Rentals, Rental Quotes, Rental Contracts, Rental Contracts using Billing Cycles and Rental Contracts with Rental Units Linked to Items.

3.1.1.3. Other Features and Processes Available When Processing Rentals

- Internal comments can be added to the Rental Contract, which flow through to the Completed Rental Contract.

To learn about adding internal comments to a rental document, please see ODT Rental Online Help, Processing Rentals, Rental Quotes, How to Add Comments to Rental Documents.

To learn about the following processing features, see ODT Rental Online Help, Processing Rentals.

- Summarize the Rental Amount Lines, when using Rental Terms with a Period Code of Day.
- Copy an open or completed Rental Contracts or Rental Quote from a Rental Quote or Rental Contract.
- Create Rental Quotes and Rental Contracts directly from a Contact card.
- Re-open a Completed Rental Contract, which provides the ability to do a Corrective Rental Credit Memo, enter and invoice additional metered usage or periodic usage or add additional rental or sales lines.
- Reconciling Rental Quantities and Resolve Rental Shortages, which assists users in determining if there are shortages on any contracts. And provides the ability to resolve shortages directly from the rental contract.
- Blank Rental Return, which allows for open ended rentals. This feature provides for recurring invoicing on a per rental period basis until a Rental Return Date is entered and the units are returned.
- Batch invoice Rental Contracts, which enables the invoicing of multiple rental contracts at one time.
- Undo Rental Shipments, which enables a user to automatically reverse the shipment of a rental unit, change the unit and ship the newly selected unit.
- Pending Shipments and Returns, enables the user to review directly from Cues available on the Business Manager and Sales Order Processor profiles, all contracts or units for which there are pending shipments and pending returns. From the Contracts, Shipments Due Today and Shipments – Future cues the user can print a listing of Pick Tickets for selecting the units to be shipped. From the Units, To Ship cue, the user can print a Pick List of all rental units to be shipped. These lists are for warehouse and/or yard personnel for selecting the units to be rented, picking the units specified on the Rental Contracts, shipping the units and returning the units.
- Partial Shipments and Returns, provides the capability to ship or return a portion of the quantity on rent.
- Swap/Exchange Rental Units out on rent.
- The Bulk Returns feature provides the ability to update the Rental Return date, update the Quantity to Return on the rental unit lines in the contract and return units to a different or temporary location.



- The Rental Rapid Returns document feature provides the ability to return units on multiple contracts using Barcode scanning and direct entry of the Rental Unit No. or Serial No., whether on the unit or in the Item Tracking Lines on a contract.
- Returning Units to a different or temporary rental location.
- Undo Returns, which enables users to automatically reverse the return of a rental unit.
- Credit Memos for rentals.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, in a United States company.

Therefore, the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

For information on the setup and processing of rentals using the Price Incl. VAT, see the ODT Rental Online Help, Rest of World Additional Rental Processes, Processing Rentals using Price Incl. VAT.

3.1.1.4. Additional Rental Processes

The following is a list of additional rental features and processes, which are available.

To learn about these additional features, see ODT Rental Online Help, Additional Rental Processes.

- 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.
- Rental Custom Calendar, which provides the ability to specify non-billable days and days that a standby price is to be billed to the customer.
- Rental Packages provides the ability to create kits comprised of components. Components which can be specified in a package include Rental Unit Groups, Rental Units, Standard Text Codes, and descriptive comments. The Rental Packages provides the capability to create 2 types of packages, which are based on how the pricing occurs.
 1. Price Allocation packages, where the package rental unit price per rental period of the package is allocated to the components in the package. The pricing for billing the customer can be configured on the package price cards per rental term or be entered directly on the rental lines of a quote or contract.
 2. Roll-up Price packages, where the package unit price per rental period is the sum of the rental unit prices on the component lines.
- Metered Usage, which provides the ability to track usage of equipment, which can be for maintenance purposes only, or can be for both maintenance and billing purposes. Billing for metered usage can be single or multi-level, which means customers may get a specified usage allowances at each level, which charge different usage unit rates, depending on the level of the usage.
- Periodic Usage and Standby Charges pricing can be used for the unique circumstance where a customer is billed a daily rate, when the days to be billed are not consecutive. Another example is where the customer is billed one rate when the equipment is in use, and another when it is on standby. Standby charges are

optional.

- Subcontracting rental product and automatically populate the Rental Unit No. field on a contract line. From the rental line a Purchase Order can automatically be created.
- Process Contracts across Time Zones, which enables the ability to enter a quote or contract in one time zone, ship the units from a different time zone, invoice in yet another time zone, and return the units, groups and packages in another time zone.
- Rental FA Transfer Journal, which ensures Fixed Assets which are linked to units have the Rental Location on the asset card updated when the unit is rented out and returned. The journal can be used as well to transfer Fixed Assets to a different rental locations, which when posted will update the Rental Unit as well.
- Rental Line Discounts, which provides the ability to specify rental discount percentages on the Customer Cards, or enter the rental discount percentages to be applied to the rental lines directly on a Rental Quote and Rental Contract.
- Links, Notes and Attachments, which can be added to Rental Units, and Rental Documents on both the Rental and Sales Lines.
- Transfer Rental Lines on a contract to a new contract.
- Create an Advanced Proforma Invoice, which creates a Sales Invoice and locks the contract so no changes can be made until the Advanced Proforma Invoice is posted.
- Track Customer Certificates on Insurance.
- Capture Electronic Signatures on rental documents.
- Rental Accruals and Deferrals, which provides a reversing rental accrual journal where the automatic calculation of rental revenue accrual amounts, and if desired, rental revenue deferral amounts is ran. The posting of the journal will update the G/L accounts specified on the Customer Posting Group and General Posting Setup.
- Integration with Jobs, which provides the ability to append Job Planning Lines to the Sales Lines on a Rental Contract. When the contract sales lines are invoiced, the applicable Job Planning Lines are updated, and Job Ledger Entries are created.
- Additional Notes for Rentals, which provides the ability to link Standard Text Codes with or without extended text and/or description notes to units and specify which rental documents they are to print on. In addition, the Additional Notes can be added to a rental line directly on the Rental Quote and Rental Contract.
- Rental Categories and Attributes, provides a means to maintain an overview of the rental units and to help sort and find units, it is useful to organize rental groups and units into categories. To find rental units by characteristics, rental attributes can be assigned to rental groups and units and also to rental categories.

3.2. Rental Availability

3.2.1. Group Availability Matrix

3.2.1.1. Group Availability Matrix Overview

3.2.1.1.1. Overview

The Group Availability Matrix provides a quick view of the availability of a group and the rental units linked to a group. Thus, facilitating the selection of the rental units on the rental quote or rental contract lines.

The matrix uses the reservation functionality to determine the quantities displayed within the matrix.

A variety of filter fields are provided, which can be used to fine tune the view as needed.



In addition, the Unit Availability Matrix can be accessed from the group matrix, which will display the units assigned to the selected group in the matrix lines

The Unit Availability Matrix provides a variety of filter fields, which can be used to fine tune the view as needed.

The Group Availability Matrix is available on the Business Manager and Order Processor role centers or using Search, which when opened will display the availability for all Rental Unit groups.

Should a Rental Unit Group record have late returns based on the dates in the columns, then the record will show in red.

The ability to automatically generate a "Quick Rental" provides the options to create a new rental document or append to a current rental document is available from the Group Availability Matrix and the Unit Availability Matrix accessed from the role centers or Search.

For additional information on the Quick Rentals, please see the ODT Rental Online Help, Processing Rentals – Quick Rentals.

The Group Availability Matrix is also available from the Rental Quote and Rental Contract. When accessed here, the matrix is filtered to the group on the rental line, which has been selected on the line prior to opening the matrix.

For additional information on the Rental Unit card status fields, please see the ODT Rental Online Help, Reviewing Rentals – Rental Units – Rental Status Overview.

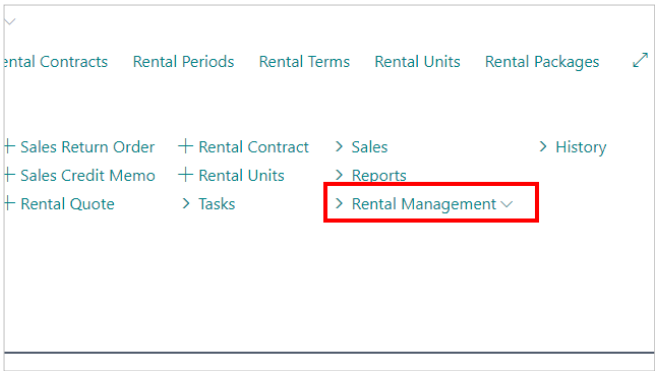
To review the availability of Rental Units not linked to a group, review the Rental Unit Card.

3.2.1.1.2. Accessing the Group Availability Matrix

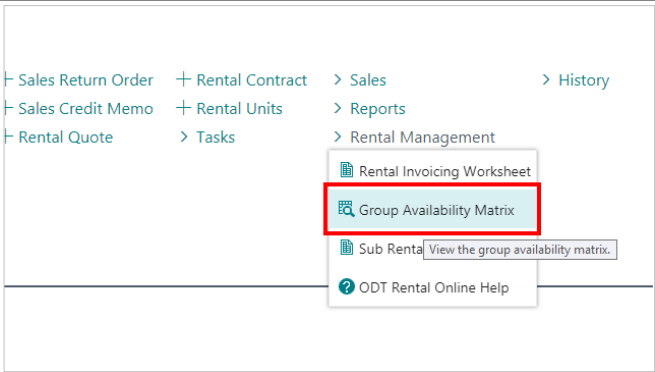
The following demonstrates the opening of the matrix from the Sales Order Processor Role Center.

The same steps apply to users having the Business Manager Profile.

Click on the link **Rental Management** □

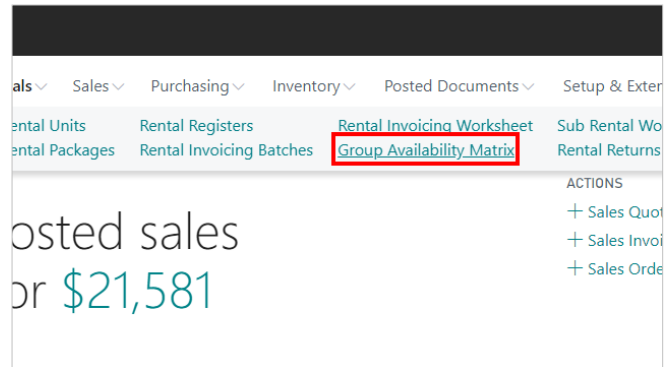


Click on the navigation menu item **Group Availability Matrix**



The following demonstrates the opening of the matrix from a Rental Contract.

Click on the navigation menu item **Group Availability Matrix**



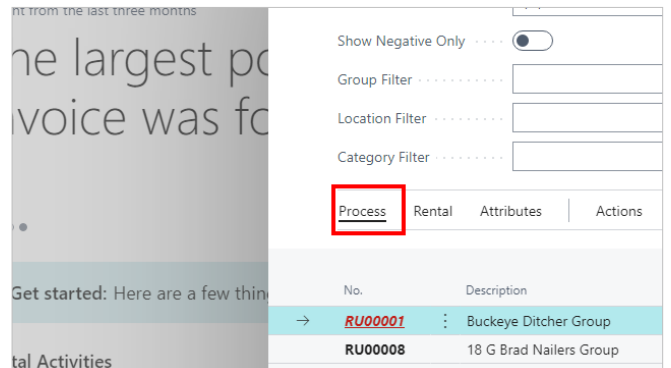
3.2.1.1.3. Menu Options

The menu options are displayed in the following picture. The menu options of Process, Rental, Attributes, Actions and Related contain sub-menu options which are displayed when the option is clicked on.



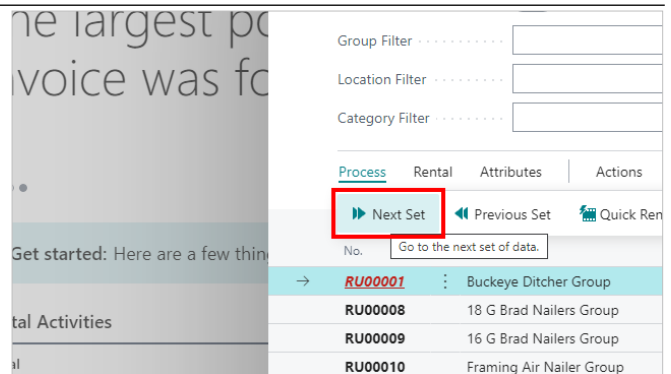
The following describes the Process sub-menu options.

Click on the navigation menu item popup **Process**



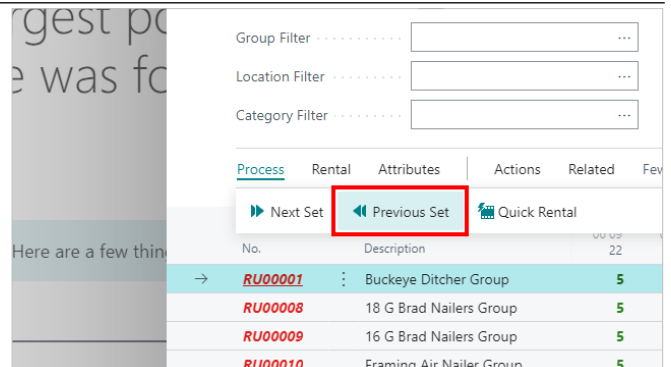
Click on the navigation menu item **Next Set**

Clicking on the Next Set will update the line dates and quantities to the next set of dates.



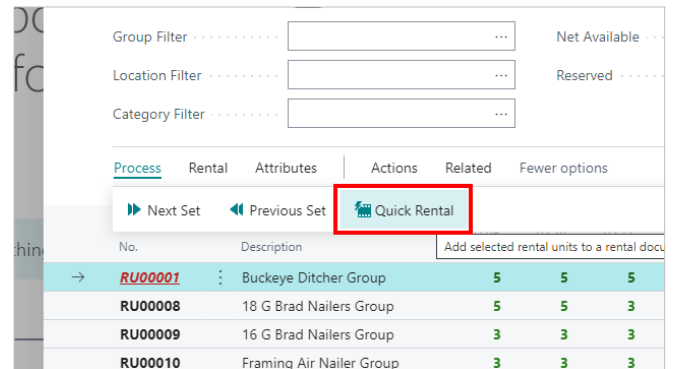
Click on the navigation menu item **Previous Set**

Clicking on the Previous Set will update the line dates and quantities to the previous set of dates.



Click on the navigation menu item **Quick Rental**

The Quick Rental provides the ability to create a new Rental Quote or Contract with the selected groups added to the Rental Lines or append the selected rental groups to an existing Rental Quote or Rental Contract.



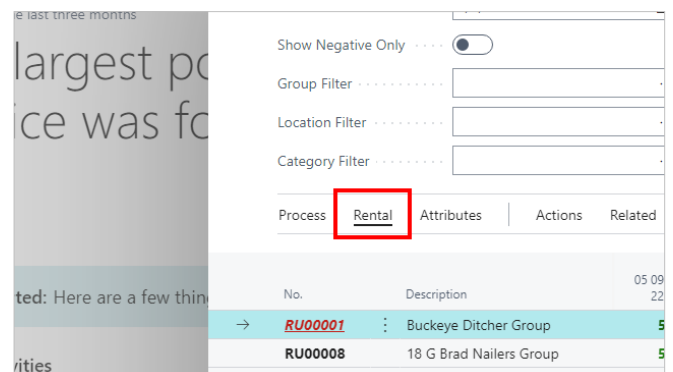
The screenshot shows the 'Quick Rental' interface. At the top, there are filter fields for 'Group Filter', 'Location Filter', and 'Category Filter'. Below these are tabs for 'Process', 'Rental', 'Attributes', 'Actions', 'Related', and 'Fewer options'. The 'Quick Rental' option is highlighted with a red box. Below the tabs is a table with columns 'No.', 'Description', and 'Add selected rental units to a rental docu'. The table contains the following data:

No.	Description	Add selected rental units to a rental docu
→ RU00001	Buckeye Ditcher Group	5 5 5
RU00008	18 G Brad Nailers Group	5 5 3
RU00009	16 G Brad Nailers Group	3 3 3
RU00010	Framing Air Nailer Group	3 3 3

For information on the Quick Rentals, please see the ODT Rental Online Help, Processing Rentals – Quick Rentals.

The following describes the Rental sub-menu options.

Click on the navigation menu item popup **Rental**

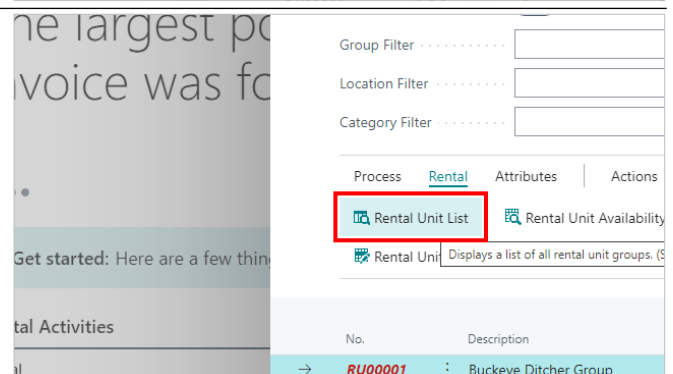


The screenshot shows the 'Rental' sub-menu. It has a 'Show Negative Only' toggle and filter fields for 'Group Filter', 'Location Filter', and 'Category Filter'. Below these are tabs for 'Process', 'Rental', 'Attributes', 'Actions', and 'Related'. The 'Rental' tab is highlighted with a red box. Below the tabs is a table with columns 'No.', 'Description', and '05 09 22'. The table contains the following data:

No.	Description	05 09 22
→ RU00001	Buckeye Ditcher Group	5
RU00008	18 G Brad Nailers Group	5

Click on the navigation menu item **Rental Unit List**

When selected, a listing of all Rental Unit Groups will be displayed.

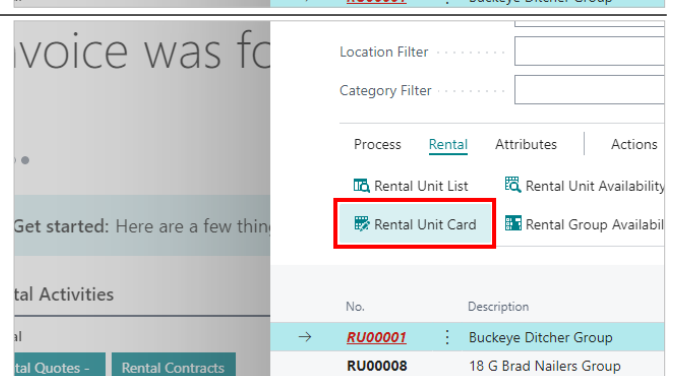


The screenshot shows the 'Rental Unit List' interface. It has filter fields for 'Group Filter', 'Location Filter', and 'Category Filter'. Below these are tabs for 'Process', 'Rental', 'Attributes', and 'Actions'. The 'Rental' tab is highlighted with a red box. Below the tabs are two options: 'Rental Unit List' (highlighted with a red box) and 'Rental Unit Availability'. Below these is a table with columns 'No.', 'Description', and '05 09 22'. The table contains the following data:

No.	Description	05 09 22
→ RU00001	Buckeye Ditcher Group	5

Click on the navigation menu item **Rental Unit Card**

When selected, the Rental Unit card for the selected group will open.

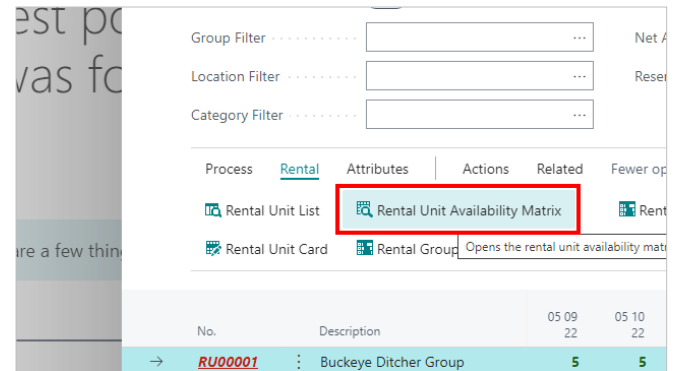


The screenshot shows the 'Rental Unit Card' interface. It has filter fields for 'Location Filter' and 'Category Filter'. Below these are tabs for 'Process', 'Rental', 'Attributes', and 'Actions'. The 'Rental' tab is highlighted with a red box. Below the tabs are three options: 'Rental Unit List', 'Rental Unit Availability', and 'Rental Unit Card' (highlighted with a red box). Below these is a table with columns 'No.', 'Description', and '05 09 22'. The table contains the following data:

No.	Description	05 09 22
→ RU00001	Buckeye Ditcher Group	5
RU00008	18 G Brad Nailers Group	5

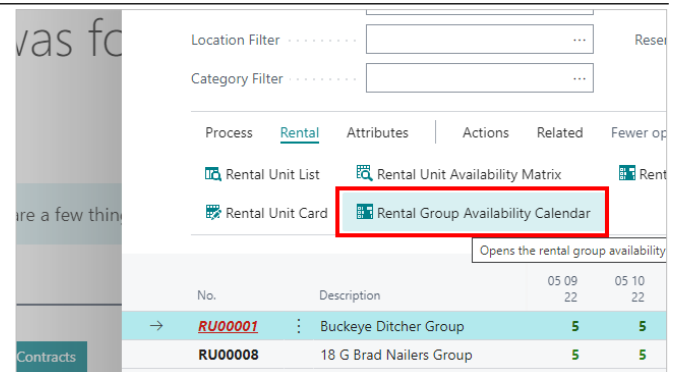
Click on the navigation menu item **Rental Unit Availability Matrix**

The Rental Unit Availability Matrix displays the availability of the Rental Units assigned to the rental group the cursor is on when selecting the menu option.



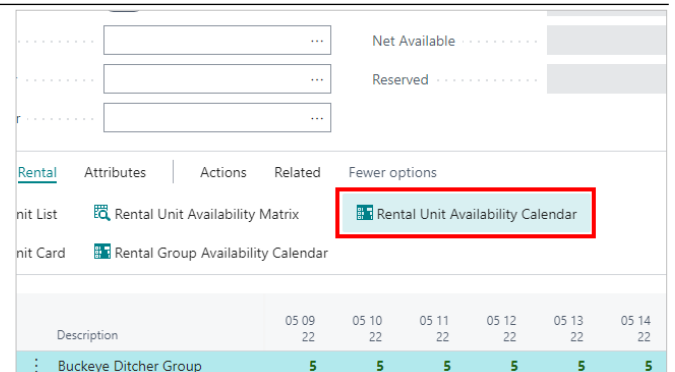
Click on the navigation menu item **Rental Group Availability Calendar**

The Rental Group Availability Calendar displays the Rental Group and assigned Rental Units availability in a calendar view.



Click on the navigation menu item **Rental Unit Availability Calendar**

The Rental Unit Availability Calendar displays the availability of the Rental Units assigned to the Rental Group the cursor is on when selecting the menu option.

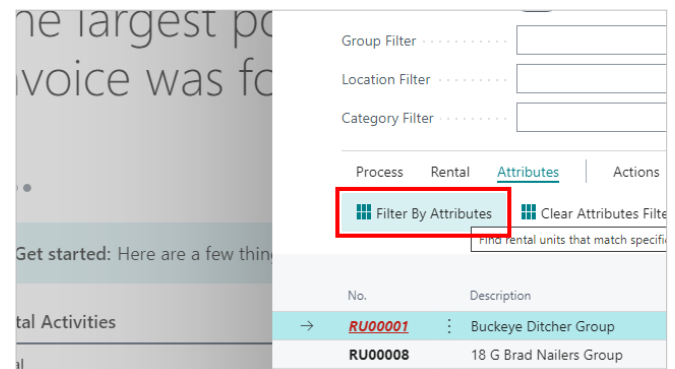


To learn about the availability calendars, please see the Visual Rental Availability Calendars user help.

The following describes the Attributes sub-menu options.

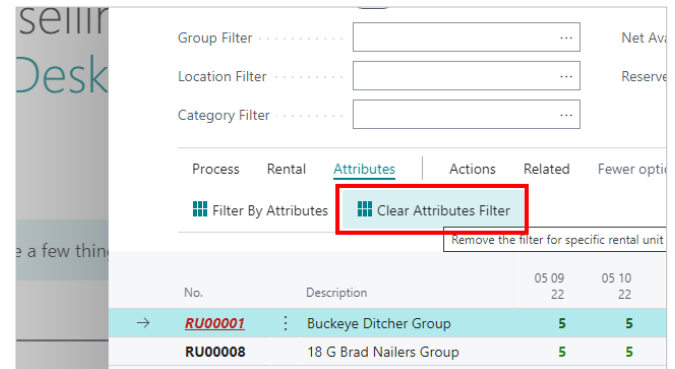
Click on the navigation menu item **Filter By Attributes**

The Filter by Attributes provides the ability to filter the matrix records by selecting the Attributes and specifying the desired Attribute Values.



Click on the navigation menu item **Clear Attributes Filter**

The Clear Attributes Filter clears the Attribute and Attribute Values records entered when Filter by Attributes has been configured.



The screenshot shows the 'Attributes' tab in the navigation menu. The 'Clear Attributes Filter' button is highlighted with a red box. Below the navigation menu, there is a table with columns: No., Description, 05 09 22, and 05 10 22. The table contains two rows: 'BU00001' with description 'Buckeye Ditcher Group' and 'BU00008' with description '18 G Brad Nailers Group'.

The Actions menu option contains the same sub-menu options as in the Process option.

The Related option contains the same sub-menu options as described in the Rental menu option.

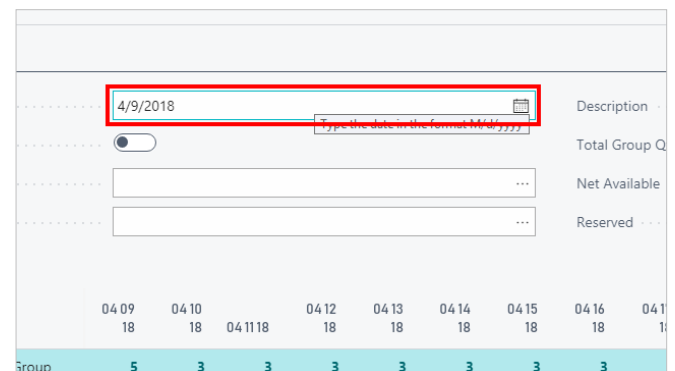
3.2.1.1.4.

Option Tab Fields

Click on the field **Start Date**

When opening the matrix, the Start Date is automatically populated with the work date. This field controls what dates will show in the matrix lines for the displayed set. This date can be overridden to change the displayed set to different dates.

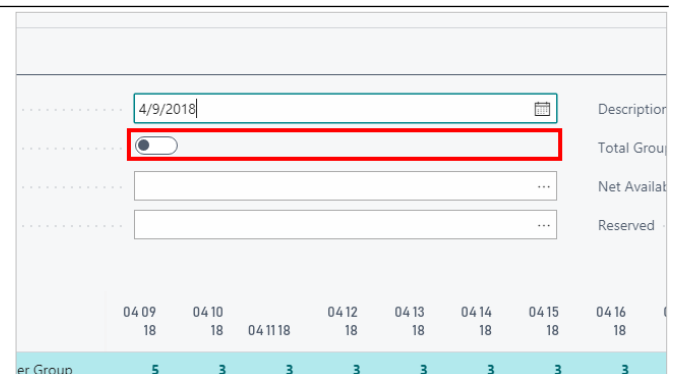
This can be done by selecting the desired Start Date, which will update the line dates and quantities.



The screenshot shows the 'Start Date' field in the 'Option Tab Fields' section. The field is highlighted with a red box and contains the date '4/9/2018'. Below the field, there is a table with columns: 04 09 18, 04 10 18, 04 11 18, 04 12 18, 04 13 18, 04 14 18, 04 15 18, 04 16 18, and 04 17 18. The table contains two rows: 'Group' and 'er Group'.

Click on **Show Negative Only, No**

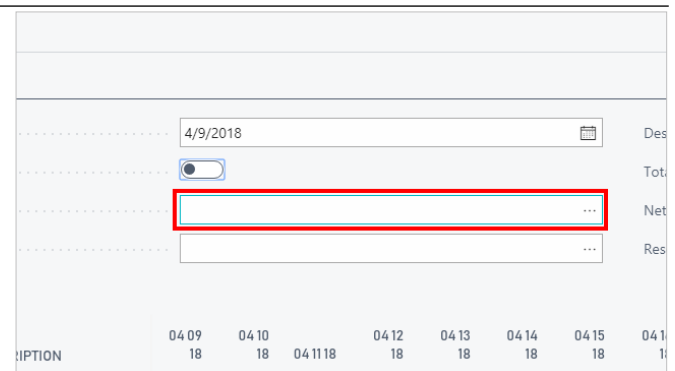
This field by default is set to No. When this field is set to Yes, then the matrix lines will be restricted to display only those groups with negative quantity available.



The screenshot shows the 'Show Negative Only' field in the 'Option Tab Fields' section. The field is highlighted with a red box and contains the value 'No'. Below the field, there is a table with columns: 04 09 18, 04 10 18, 04 11 18, 04 12 18, 04 13 18, 04 14 18, 04 15 18, 04 16 18, and 04 17 18. The table contains two rows: 'Group' and 'er Group'.

Click on the field **Group Filter**

To restrict the matrix lines to display a single or multiple Rental Unit Groups, lookup and select the applicable group or groups. The selecting of multiple groups can be accomplished using the Select More option on the list and checking the groups to be included.

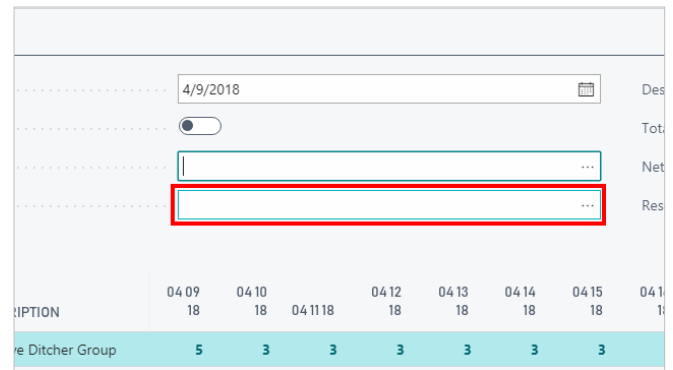


The screenshot shows the 'Group Filter' field in the 'Option Tab Fields' section. The field is highlighted with a red box and contains the date '4/9/2018'. Below the field, there is a table with columns: 04 09 18, 04 10 18, 04 11 18, 04 12 18, 04 13 18, 04 14 18, 04 15 18, 04 16 18, and 04 17 18. The table contains two rows: 'Group' and 'er Group'.

Click on the field **Location Filter**

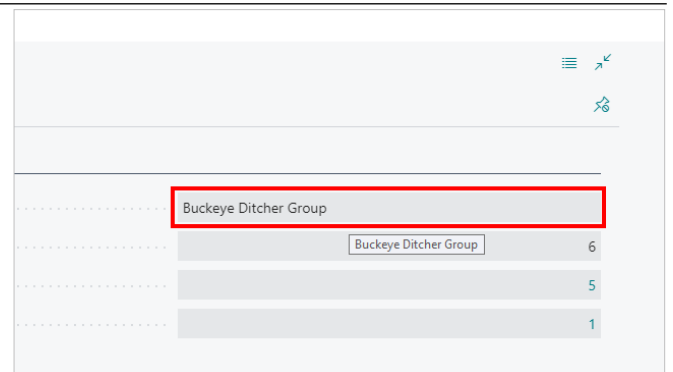
To restrict the matrix quantities to a specific rental Location, lookup and select or enter the desired Location.

The quantity fields that will be restricted to display the quantities related to the specified Location includes Total Group Qty., Net Available, Reserved and the quantity fields on the matrix lines.



Click on the field **Description**

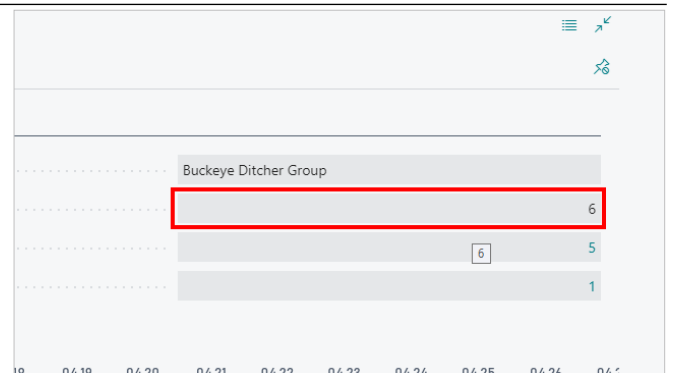
Displays the description of the Rental Unit group line selected in the lines.



Click on the field **Total Group Qty.**

Displays the quantity of rental units linked to the group for the rental group selected on the matrix lines.

When clicking on the quantity a window will open displaying a listing of all Rental Units that are assigned to the group, excluding units flagged as Sub-Rentals. If the Location Filter is populated, this quantity is revised to display the quantity for only the specified Location.



Click on the field **Net Available**

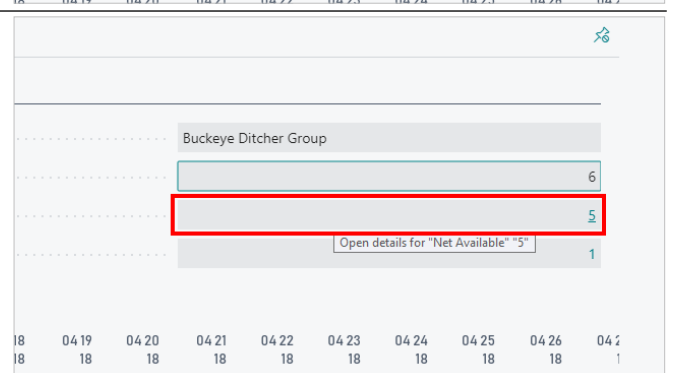
The Net Available field displays the quantity of units available to rent for the group selected on the matrix lines.

The quantity displayed will be filtered based on the Start Date and Location filters, if specified.

When clicking on the quantity, a window will open displaying a listing of Rental Units assigned to the group, which are available to rent.

When clicking on the quantity, a page will open which displays a listing of all rental units in the group selected that are available to rent.

Within the listing of the units, if the On Rent or Reservations Exist fields have No displayed, then these units are available. When the On Rent or Reservations Exist fields have yes displayed, then these units are not available.



It also provides the ability to filter the list of the group units by Start Date, Location, Category and Attributes.

Click on the cell **No.** with the value **RU00009**

Process	Rental	Actions	Navigate	Fewer options
No.	Description	04 06 20	04 07 20	04 08 20
→ RU00001	Buckeye Ditcher Group	6	6	6
RU00008	18 G Brad Nailers Group	5	5	5
RU00009	16 G Brad Nailers Group	5	5	5
RU00010	Framing Air Nailer Group	5	5	5
RU00011	Power Shovel Group	5	5	5
RU00012	Cut-Off Gasoline Saw GRP - Hy...	5	5	5
RU00018	Mini Excavator Group	5	5	5
RU00019	Standard Bucket Grp for Mini E...	5	5	5

Click on the navigation menu item popup **Rental**

Start date

4/07/2020

Show Negative Only

☒

Group Filter

Location Filter

Process

Rental

Actions

Navigate

Fewer options

No.	Description	04 06 20	04 07 20	04 08 20
RU00001	Buckeye Ditcher Group	6	6	6
RU00008	18 G Brad Nailers Group	5	5	5

Click on the navigation menu item **Rental Unit Availability Matrix**

Group Filter

Location Filter

Process

Rental

Actions

Navigate

Fewer options

Rental Unit List

Rental Unit Card

Rental Unit Availability Matrix

No.	Description	Rental Unit Availability Matrix. Opens the rental			
RU00001	Buckeye Ditcher Group	6	6	6	6
RU00008	18 G Brad Nailers Group	5	5	5	5
RU00009	16 G Brad Nailers Group	5	5	5	5
RU00010	Framing Air Nailer Group	5	5	5	5

The matrix lines display the availability on a per day basis, starting from the date in the Start Date field.

If the unit is available, then a 1 will be displayed in the date columns.

When a unit is reserved or out on rent, then a red 0 will be display in the date columns, covering from the Rental Start Date to the Rental Return Date on the Rental Line the unit is on.

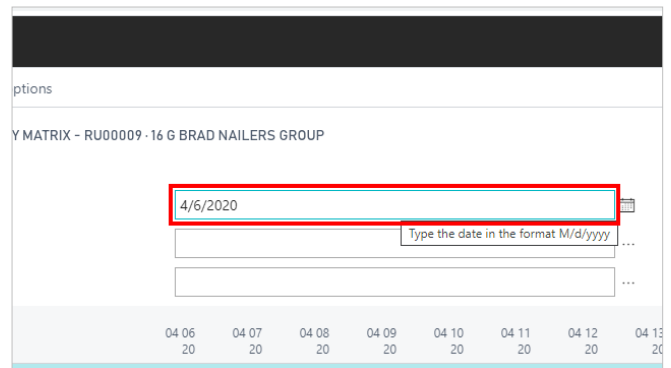
By clicking on the 0, a page will open that displays whether the unit is on rent or a reservation exists. The Reservation Start Date-Time and the Reservation End Date-Time are also displayed.

By clicking on the "Yes" in the Reservations Exist column, the Reservation Entry for the unit will be displayed which will provide the quote number, if reserved on the quote, or the contract number.

Click on the field **Start Date**

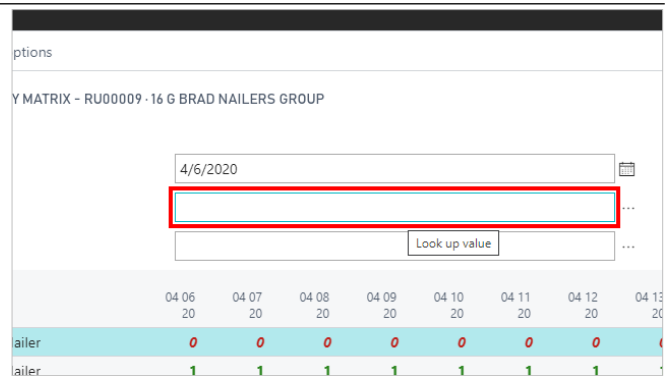
When opening the matrix, the Start Date is automatically populated with the work date. This field controls what dates will show in the matrix lines for the displayed set. This date can be overridden to change the displayed set to different dates.

This can be done by selecting the desired Start Date, which will update the line dates and quantities.

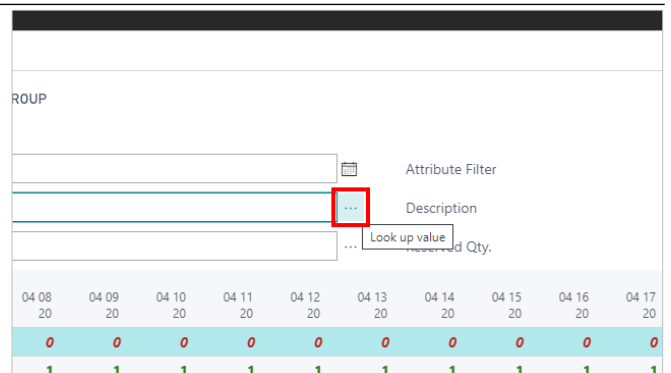


Click on the field **Location Filter**

To restrict the displayed units to a specific rental Location, lookup and select or enter the desired Location.

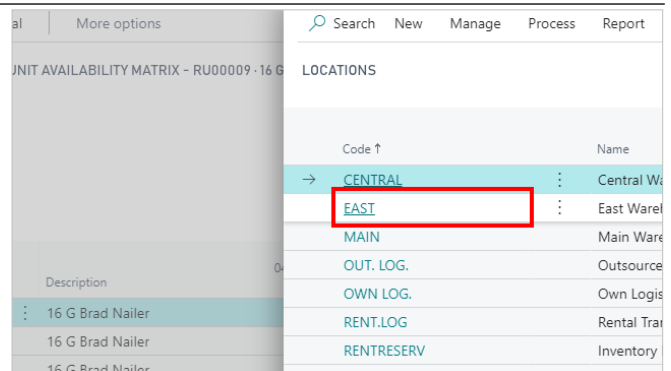


Click on the lookup button **Location Filter**



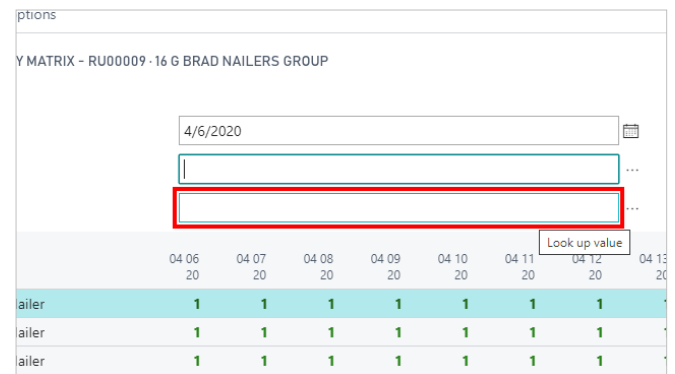
Click on the link in cell **Code** with the value **EAST**

To clear the filter, delete the selected location from the field.



Click on the field **Category Filter**

If Categories have been assigned to the units, to restrict the displayed units to a specific Category, lookup and select or enter the desired Category.



ptions

Y MATRIX - RU00009 - 16 G BRAD NAILERS GROUP

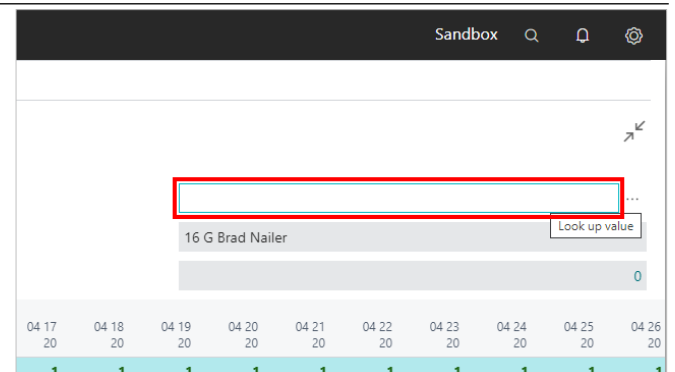
4/6/2020

Look up value

	04 06 20	04 07 20	04 08 20	04 09 20	04 10 20	04 11 20	04 12 20	04 13 20
ailer	1	1	1	1	1	1	1	1
ailer	1	1	1	1	1	1	1	1
ailer	1	1	1	1	1	1	1	1

Click on the field **Attribute Filter**

If Attributes and Attribute Values have been setup on the units assigned to the group, then the list of units can be filtered to display only the units with specific attributes and values.



Sandbox

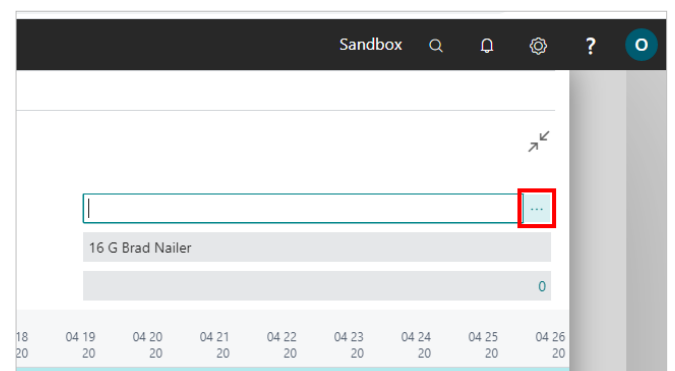
16 G Brad Nailer

Look up value

	04 17 20	04 18 20	04 19 20	04 20 20	04 21 20	04 22 20	04 23 20	04 24 20	04 25 20	04 26 20
	1	1	1	1	1	1	1	1	1	1

The following demonstrates the setting of an Attribute and Attribute Value filter.

Click on the lookup button **Attribute Filter**



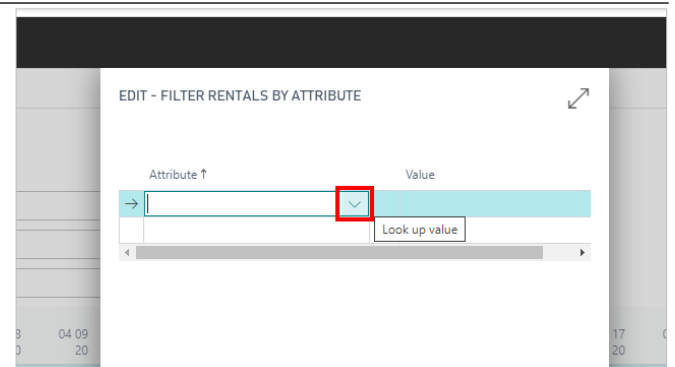
Sandbox

16 G Brad Nailer

Look up value

	04 18 20	04 19 20	04 20 20	04 21 20	04 22 20	04 23 20	04 24 20	04 25 20	04 26 20
	1	1	1	1	1	1	1	1	1

Click on the lookup button in the cell **Attribute**



EDIT - FILTER RENTALS BY ATTRIBUTE

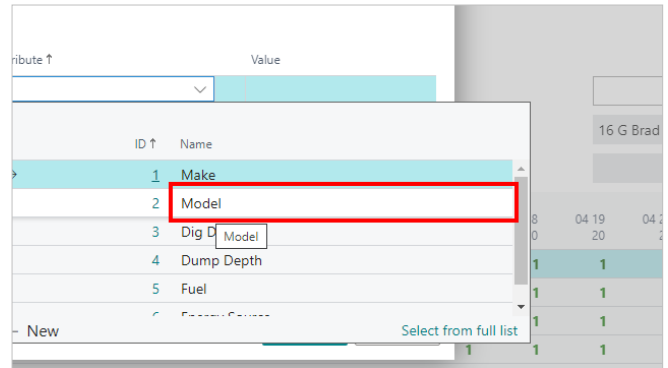
Attribute ↑

Value

Look up value

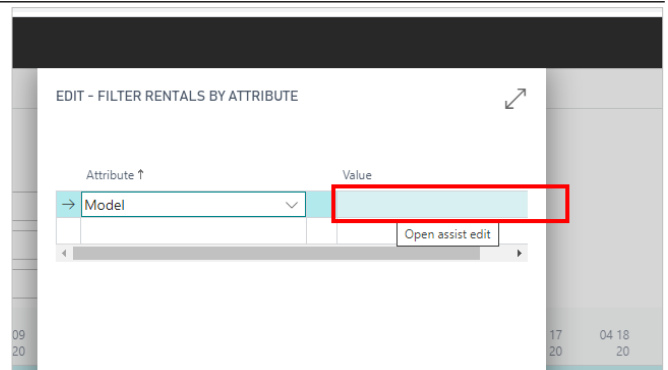
	04 09 20	04 10 20	04 11 20	04 12 20	04 13 20	04 14 20	04 15 20	04 16 20	04 17 20	04 18 20	04 19 20	04 20 20	04 21 20	04 22 20	04 23 20	04 24 20	04 25 20	04 26 20
	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	

Click on the cell **Name** with the value **Model**



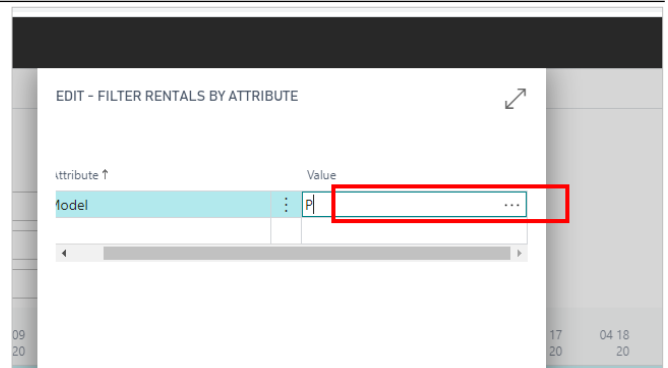
The screenshot shows a dropdown menu titled 'Attribute' with a list of options. The option 'Model' is highlighted with a red box. The background shows a table with columns 'ID' and 'Name'.

Click on the cell **Value**



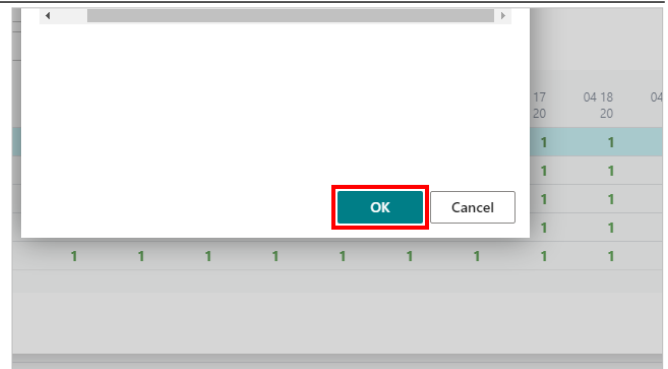
The screenshot shows the 'Value' input field in the 'Attribute' dropdown menu. The field is empty and highlighted with a red box. The background shows a table with columns 'ID' and 'Name'.

Enter the text **P320**.



The screenshot shows the 'Value' input field in the 'Attribute' dropdown menu. The text 'P320' is entered into the field, which is highlighted with a red box. The background shows a table with columns 'ID' and 'Name'.

Click on the button **OK**



The screenshot shows the 'OK' button in the 'Attribute' dropdown menu. The button is highlighted with a red box. The background shows a table with columns 'ID' and 'Name'.

To clear the Attribute filter, delete the data in the field.



ODT Rentals Online Help

Click on the field **Reserved Qty.**

When clicking on the quantity when 1 is display, which will provide the quote number, if reserved on the quote, or the contract number.

The screenshot shows a web interface with a table. At the top, there is a search bar containing 'MODEL: P320' and a dropdown menu showing '16 G Brad Nailer'. Below this, a table is displayed with columns representing dates from 04 17 20 to 04 26 20. The first row of the table has the value '1' in each date column. The 'Reserved Qty.' field, which is the first '1' in the 04 17 20 column, is highlighted with a red box. To the right of the table, there is a button labeled 'Open details for "Re'.

Click on the button **Close**

The screenshot shows a web interface with a table. The table has columns representing dates from 04 17 20 to 04 26 20. The first row of the table has the value '1' in each date column. The 'Close' button, which is the first '1' in the 04 17 20 column, is highlighted with a red box. To the right of the table, there is a button labeled 'Open details for "Re'.

3.2.2. Rental Inventory Availability

3.2.2.1. Overview

The Rental Inventory Availability matrix provides a quick snapshot of the projected available quantity of inventory Items linked to Rental Units.

The matrix also contains a Quick Rentals feature, which provides the ability to create a new rental document containing selected Rental Units or to append selected Rental Units to an open rental document.

For information on the Quick Rentals feature, please see the ODT Rental Online Help, Processing Rentals – Quick Rentals.

The matrix provides a variety of filtering options, which filter either the lines and/or the line quantities.

Rental Inventory Availability

PG-001 · Portable Generators

Next Set Previous Set Quick Rental Actions Related Fewer options

Options

Start Date 5/9/2022 Rental Unit Filter Location Filter Item Filter Category Filter

Lines

No. ↑	Item No.	Item Description	05/09...	05/10...	05/11...	05/12...	05/13...	05/14...
→ PG-001	1000	Portable Generators	40	40	40	40	40	
RU00026	1001	Wacker Hammer Drill Bits 1/2 inch	20	20	20	20	20	
RU00027	1003	Air Impact Wrench, 1 in.	20	20	20	20	20	
RU00032	1006	Series 10 Sucker Rod Overshot	10	10	10	10	10	
RU00033	1007	Basket Grapple	10	10	10	10	10	
RU00034	1008	Spiral Grapple	10	10	10	10	10	

When the Rental Availability Matrix is accessed using the Search, Main Command bar, second Command bar or through the Actions, Rental Management, then the matrix records display all Items linked to a Rental Unit. When the matrix is accessed from the Rental Lines on a Rental Quote or Rental Contract, then the matrix displays only the record for the Item on the selected rental line.

A drill down is provided on the quantity on in the date columns which provides the details related to the displayed quantity, including Total Rental Quantity, Qty. on Rent/Reserved, Expected Qty. to Return and the Projected Available Balance as at that date.

Rental Inventory Availability - Item

1000 Portable Generators

Period Start ↑	Period Name	Total Rental Quantity	Qty. on Rent/Reserved	Expected Qty. to Return	Projected Available Balance
→ 4/15/2021	Thursday	12	2	0	10

3.2.2.2. Accessing the Rental Inventory Availability Matrix

The Rental Inventory Availability list can be accessed from the following places.

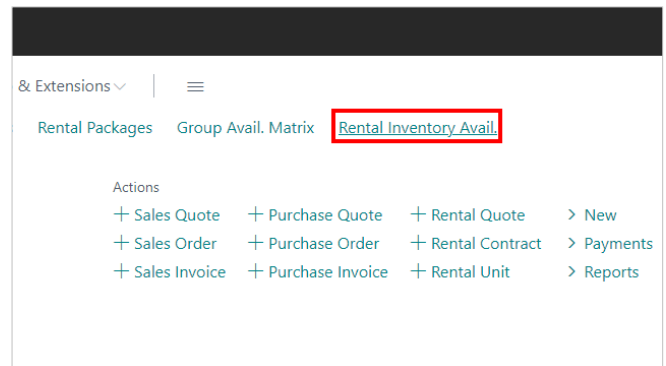
- Using the Search option.
- From the Role Centers, Business Manager and Sales Order Processor. - Main Command bar and second Command bar

- Rentals menu option - Actions section, Rental Management
- Rental Quote and Rental Contracts, Rental Lines, Manage menu option.

The following example demonstrates accessing the Rental Inventory Availability matrix from the Business Manager role center.

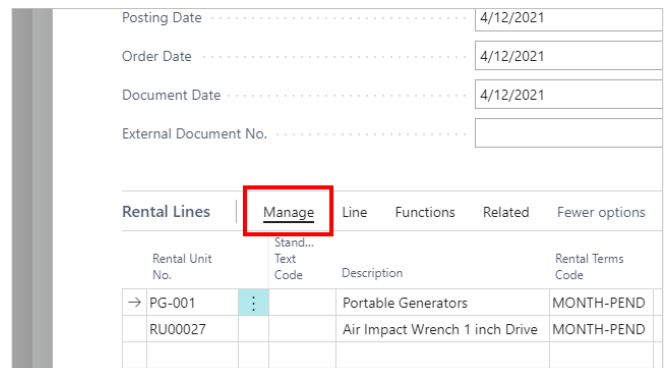
The same steps can be used in the Sales Order Processor role center.

Click on the navigation menu item **Rental Inventory Avail.**

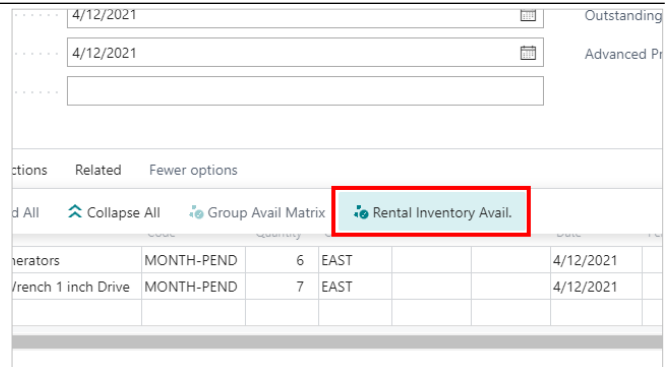


The following example demonstrates accessing the Rental Inventory Availability matrix from a Rental Contract.

Click on the navigation menu item popup **Manage**



Click on the link **Rental Inventory Avail.**



3.2.2.3. Rental Inventory Availability Page

The following picture displays the Rental Inventory Availability matrix.

Rental Inventory Availability

PG-001 · Portable Generators

Next Set Previous Set Quick Rental Actions Related Fewer options

Options

Start Date
5/9/2022

Rental Unit Filter

Location Filter

Category Filter

Item Filter

Lines

No. ↑	Item No.	Item Description	05/09...	05/10...	05/11...	05/12...	05/13...	05/14...
→ PG-001	1000	Portable Generators	40	40	40	40	40	
RU00026	1001	Wacker Hammer Drill Bits 1/2 inch	20	20	20	20	20	
RU00027	1003	Air Impact Wrench, 1 in.	20	20	20	20	20	
RU00032	1006	Series 10 Sucker Rod Overshot	10	10	10	10	10	
RU00033	1007	Basket Grapple	10	10	10	10	10	
RU00034	1008	Spiral Grapple	10	10	10	10	10	

The matrix provides a variety of filtering options, which filter the lines and the line quantities per day including:

- **Start Date:** Used for specifying the date to be set on the first date column. The user's Work Date defaults to this field and can be overridden.
- **Location Filter:** For specifying a rental location to filter the matrix records to display the projected available quantities for only the selected rental location.
- **Category Filter:** For specifying a Rental Category Code to filter the records to display only those Rental Units that have the specified Category.
- **Rental Unit Filter:** For filtering the matrix records to display only the specified Rental Units.
- **Item Filter:** For filtering the matrix records to display only the specified Items.
- **Filter by Attributes:** The Filter by Attributes menu option is located within the Related menu option. This enables the filtering of the matrix lines to display only the records where the Rental Unit Attributes match the Attributes and Values specified.

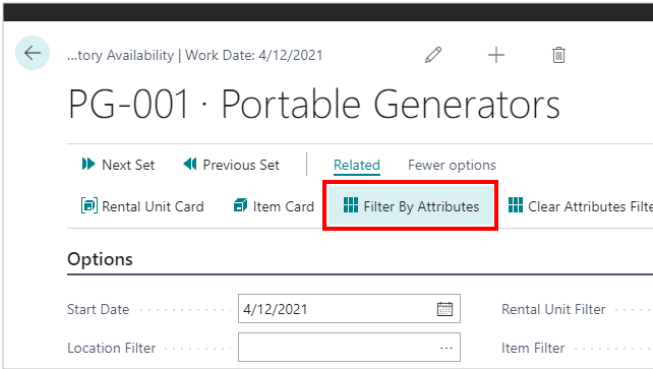
The Actions menu contains the Quick Rental menu option, which provides the ability to create a new Rental Quote or Contract with the selected Rental Units added to the Rental Lines or append selected Rental Units to an existing Rental Quote or Rental Contract.

For information on the Quick Rentals, please see the ODT Rental Online Help, Processing Rentals – Quick Rentals.

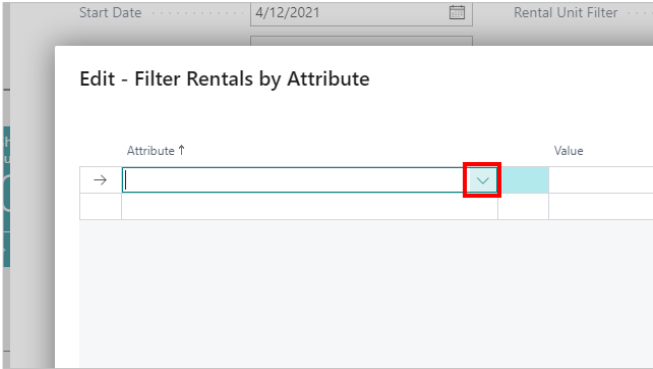
The Related menu options include:



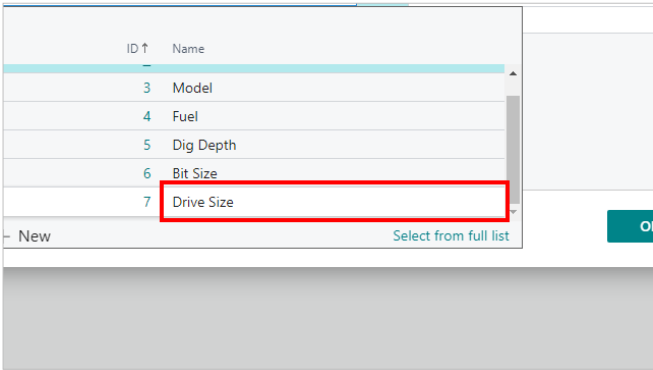
Click on the navigation menu item **Filter By Attributes**



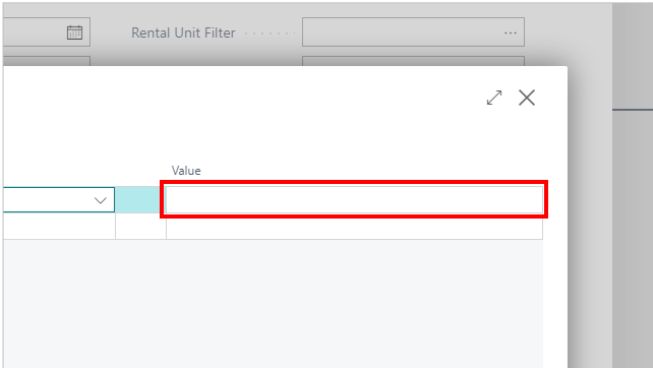
Click on **Attribute**



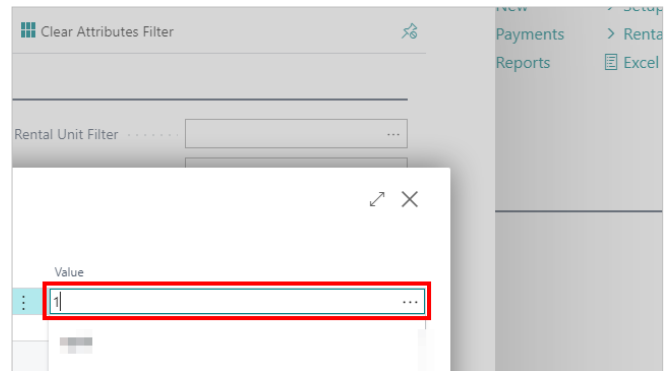
Click on the cell **Name** with the value **Drive Size**



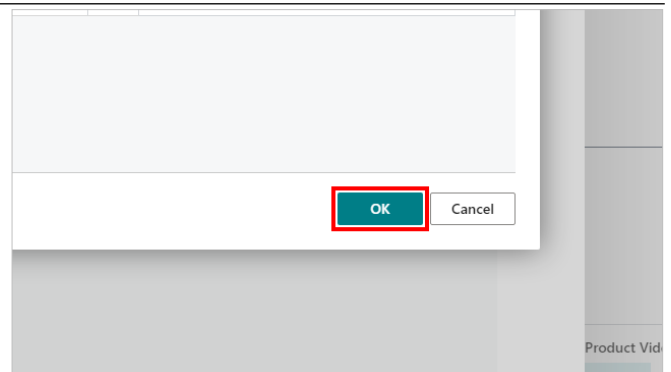
Click on the cell **Value**



Enter the text **1 inch**.



Click on the button **OK**



The following picture displays the matrix filtered by the Attribute and Value set.

To clear the Attribute filtering, select the menu option, Clear Attributes Filter.

Rental Inventory Availability

RU00027 · Air Impact Wrench 1 inch Drive

Next Set Previous Set Related Fewer options

Rental Unit Card Item Card Filter By Attributes Clear Attributes Filter

Options

Start Date 4/12/2021 Rental Unit Filter

Location Filter Item Filter

Category Filter

Lines

No. ↑	Item No.	Item Description	04/12/21	04/13/21	04/14/21	04/15/21	04/16/21	04/17/21	04/18/21	04/19/21	04/20/21	04/21/21	04/22/21	04/23/21	04/24/21	04/25/21	04/26/21
→ RU00027	1003	Air Impact Wrench, 1 in.	20	20	20	20	20	18	18	18	18	18	18	18	18	18	18

3.2.2.3.1. Rental Inventory Availability Details Page

When the quantity in one of the date columns is clicked on, then the details related to the displayed quantity in the matrix line for that date are displayed.

The following picture is an example of the details page.

Rental Inventory Availability - Item					
1000 Portable Generators					
Period Start ↑	Period Name	Total Rental Quantity	Qty. on Rent/Reserved	Expected Qty. to Return	Projected Available Balance
→ 4/15/2021	Thursday	12	2	0	10

The following provides an explanation of the fields.

- **Period Start:** Displays the date which the availability is calculated for.
- **Period Name:** Displays the day related to the Period Start date.
- **Qty. on Rent/Reserved:** Displays the sum of the quantity of all rental lines where the unit linked to the item is reserved or on rent. The reserved quantity includes Rental Quote lines which have the Commit Reservation checked and all Rental Contract lines shipped and not shipped.
- **Total Rental Quantity:** Displays the sum of the item quantity in all Locations with Allow Rentals enabled. This includes the rental Locations the items are stored at and the Rental Inventory Location specified on Rental Management Setup to which Items are transferred to when the Rental Units are shipped.
- **Expected Qty. to Return:** Displays the sum of the rental line quantities which are on rent and have a Rental Return Date equal to or later than the Rental Return Date.
- **Projected Available Balance:** Is a calculated quantity based on the equation of: Total Rental Quantity minus Qty on Rent/Reserved plus Expected Qty. to Return.

3.2.3. Visual Rental Availability Calendars

3.2.3.1. Visual Rental Availability Calendars Overview

3.2.3.1.1. Overview

The Rental Availability Calendars provide a visual graphical representation using colored bars to display the rental availability of Rental Groups, Rental Units assigned to groups and/or Rental Units not linked to Items.

The availability calendars can be accessed globally and from the rental lines' menu, which provide the capabilities to allocate group rental units or select units and modify the length/duration of the rental on a rental unit graphical bar.

The global availability calendars include the following calendars:

- Rental Avail. Calendar
- Group Avail. Matrix contains access to 2 calendars, the Rental Group Availability Calendar and the Rental Unit Availability Calendar

The Rental Line calendars on the rental documents include:

- Availability Calendar
- Group Avail. Matrix contains access to 2 calendars, the Rental Group Availability Calendar and the Rental Unit Availability Calendar

The following picture is an example of the global Rental Avail. Calendar with the Availability Option of Group Availability.

Rental Avail. Calendar: All Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day

Availability Option: Group Availability, Start Date: 05/08/22

May 8 – 14, 2022

Free Preview Mode

Rental Unit	Location Code	Description	5/8	5/9	5/10	5/11	5/12	5/13	5/14	
			Sun	Mon	Tue	Wed	Thu	Fri	Sat	
RU00001		Buckeye Ditcher Group	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	
BD-006	EAST	Buckeye Ditcher								
RU00002	WEST	Buckeye Ditcher								
RU00003	EAST	Buckeye Ditcher	4 Unavailable due to Service Status							
RU00004	EAST	Buckeye Ditcher								
RU00005	WEST	Buckeye Ditcher								
RU00006	WEST	Buckeye Ditcher								
RU00008		18 G Brad Nailers Group	7 Available	5 Available 2 On Rent	5 Available 2 On Rent	3 Available 2 Reserved 2 On Rent Reserved: RC00009 - Adatum Corporation Reserved: RC00009 - Adatum Corporation	3 Available 2 Reserved 2 On Rent	3 Available 2 Reserved 2 On Rent	3 Available 2 Reserved 2 On Rent	
RU00008-001	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST						
RU00008-002	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST						
RU00008-003	EAST	18 G Brad Nailer								
RU00008-004	EAST	18 G Brad Nailer								
RU00008-005	WEST	18 G Brad Nailer								
RU00008-006	WEST	18 G Brad Nailer								
RU00008-007	WEST	18 G Brad Nailer								

All availability calendars provide the ability to filter the calendar. The Filters menu option contains the following Filter options, which can be modified by the users.

- Availability Options, which controls how and what will be displayed in the calendar. The options include Group Availability, Group Units Availability, Unit Availability and All.
- Start Date, which on the global availability calendar the date default from the the users Work Date. On the Rental Line, Availability Calendar the date will default from the Rental Start Date on the rental line, if a unit, group is on the line selected. Otherwise, the date will default from the Document Date.
- Filtering fields, which provide the ability to filter by Group No., Location and Category.

NOTE:

Attributes filtering and clearing of Attributes filters is accomplished using the calendar menu options.

The Visual Calendar Setup provides an option field, Open with Filter Options, which when enabled displays the Filters page prior to populating the calendar on various calendars and scenarios.

For detailed information on which calendar and the scenarios that the Filters page is displayed and is not displayed when the field is enabled, please review the Visual Calendars Setup.

Features available on the availability calendars

- Double clicking on a Rental Group or Rental Unit No. opens the Rental Unit card.
- Double clicking on a calendar bar that displays a Rental Quote or Rental Contract number opens the rental document.
- When pointing to a calendar bar that displays a Rental Quote or Rental Contract number a pop up message provides additional information related to the rental.

Pop-up Messages

The following provides examples of the pop-up messages that are displayed on the calendar when pointing to the Reserved and On Rent bars.

The dates in the messages are based on the related Reservation Entry.

ODT Rentals Online Help

The following displays the message that occurs when pointing to a Reserved bar in the group section that has a rental document number and Customer name.

Point the cursor to the **Reserved: RC00009 - Adatum Corporation**

5 Available	3 Available	3 Available	3 Available	3 Available	3 Available
2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved
2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent
Reserved: RC00009 - Adatum Corporation					
Reserved: RC00009 - Adatum Corporation					

The following displays the message that occurs when pointing to a Rental Unit, On Rent bar.

Point the cursor to a Rental Unit bar: **On Rent:**
RC00011 - Adatum Corporation, Location: EAST

5 Available	5 Available	3 Available	Rental unit RU00008-001 is currently on rent by customer Adatum Corporation on document Order RC00011 for rental period: 2022/05/09 - 2022/05/22 from location EAST.	3 Available
2 On Rent	2 On Rent	2 Reserved		2 Reserved
		2 On Rent		2 On Rent
		Reserved: RG		
		Reserved: RG		
On Rent: RC00011 - Adatum Corporation, Location: EAST				
On Rent: RC00011 - Adatum Corporation, Location: EAST				

Processing functionality varies for the different availability calendars.

Please review the help on the various availability calendars for details on the processing functionality for the calendars.

3.2.3.1.2. Availabiltiy Calendar Menu Options

The following picture displays the menu option from the global Rental Avail. Calendar.

The following picture displays the menu option from the global Rental Avail. Calendar:

Rental Avail. Calendar:	All	Today	Previous	Next	Filters	Filter By Attributes	Clear Attributes Filter	Expand All	Collapse All	Refresh	Day	Week	Month
Availability Option: Group Availability, Start Date: 05/08/22													
May 8 – 14, 2022													
Rental Unit	Location Code	Description	Sun 5/8	Mon 5/9	Tue 5/10	Wed 5/11	Thu 5/12	Fri					

- **Today:** Sets the Start Date in the Filters to the current date based on the system date. The calendar will be updated to display the week in which the current date falls within.
- **Previous:** Updates the calendar to display the previous set of dates and the calendar bars and quantities.
- **Next:** Updates the calendar to display the next set of dates and updates the calendar bars and quantities.



Filters

Edit - Rental Availability Calendar Filter

Availability Option Group Availability

Start Date 5/9/2022

Group Filter

Location Filter

Category Filter

OK Cancel

Availability Option:

The Availability Option field includes the following options which control how and what is displayed in the calendar.

Group Availability sets the calendar to display all rental groups and the units assigned to the groups in an expanded mode.

Group Unit Availability sets the calendar to display all rental units that are assigned to rental groups.

Unit Availability sets the calendar to display Rental Units which are not assigned to rental groups and are not linked to Items.

All sets the calendar to display Rental Groups followed by the Rental Units assigned to the groups, and the Rental Units not assigned to a group and are not linked to an Item.

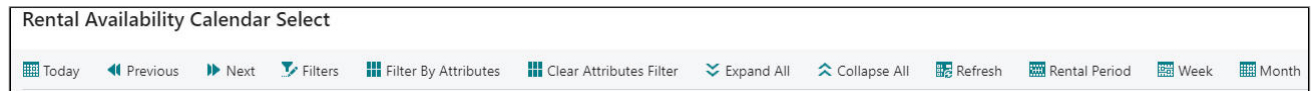
Group Filter: Provides the ability to restrict the calendar records to display only the rental group and the rental units assigned to the group.

Location Filter: Provides the ability to filter the units displayed in the calendar by location.

Category Filter: Provides the ability to filter the rental groups and units displayed in the list by rental category.

- **Filter by Attributes:** Provides the ability to filter the calendar view by Attributes and Attribute Values when they have been setup on the rental groups and/or units
- **Clear Attribute Filters:** Clears the Attributes and Attribute Values filters.
- **Expand All:** Expands the groups to display the Rental Units that are assigned to the groups. The calendar opens in the expanded view by default.
- **Collapse All:** Collapses the calendar to display the groups, but not the assigned Rental Units.
- **Refresh:** Updates the calendar to capture new or modified rental lines from the rental documents.
- **Day:** When selected will change the calendar view set to one day and displays the Date that is in the Filters, Start Date field.
- **Week:** When selected will change the calendar view set to display a weekly calendar commencing with Sunday. The initial weekly set will be the week that the Filters, Start Date falls within.
- **Month:** When selected will change the calendar view set to display a monthly calendar commencing with the first day being the first day of the month in which the Filters, Start Date falls within.

The following picture displays the Rental Line, Availability Calendar menu, which includes an additional option called, Rental Period.



When the cursor is on a rental line with a rental group or unit on the rental line, then when opening the calendar view is automatically set to Rental Period.

The Filters, Start Date is set to the Rental Start Date from the line and will be the first date in the calendar view.

3.2.3.2. Setups for the Visual Rental Availability Calendars

3.2.3.2.1. Overview

The Visual Calendar Setup includes a setup option to specify that on the availability calendars the Filters page is to open prior to populating the calendar.

The color styles of the graphical bars on the calendars are set by default and can be modified on the Visual Calendar Setup accessed from the Actions - Rental Management Set or by using Search.

On Rental Management Setup a default calendar period can be specified for the Rental Line, Availability Calendars' view to display the sets based on the number of days in the selected rental period.

This setting is only applied to the Availability Calendar when there is not a Rental Term Code on the General tab of the rental document.

3.2.3.2.2. Visual Calendar Setup

The Visual Calendar Setup consists of:

Open with Filter Options:

The field, Open with Filter Options, is used for specifying whether the Filters page will open prior to populating the availability calendar. Thus allowing users to set the filters so that the calendar will be populated based on the set filters rather than the default filters.

The following outlines the calendars and scenarios in which the Filters page is displayed and is not displayed, when the Open with Filter Options is enabled.

When enabled the Filters page will be displayed when opening the following calendars:

- the global Rental Avail. Calendar
- the global Group Availability Matrix, Rental Group Availability Calendar
- the Rental Line, Availability Calendar when the cursor is on a blank rental line or a rental line with a single unit not assigned to a group

The Filters page does not open when:

- Selecting the Availability Calendar from the Rental Line, manage Menu when the cursor is on a line that has a rental group. The calendar is automatically filtered by the Group No. of the group on the line.
- Selecting the Availability Calendar from the Rental Lines, when the cursor is on a child line of a rental group, whether the child Rental Unit No. is selected or not. The calendar is automatically filtered by the Group No. to display the group and all the units assigned to the group.
- Selecting the Availability Calendar from the Rental Lines, when the cursor is on a rental line that contains a Rental Unit No. of a unit assigned to a rental group, without the group on the rental lines. The calendar is automatically filtered to display the Group No. and all units assigned to the rental group.
- Selecting the Rental Unit Availability Calendar from the global Group Availability Matrix. The calendar is automatically filtered to display the Rental Units assigned to the rental group selected on the Group Availability Matrix.

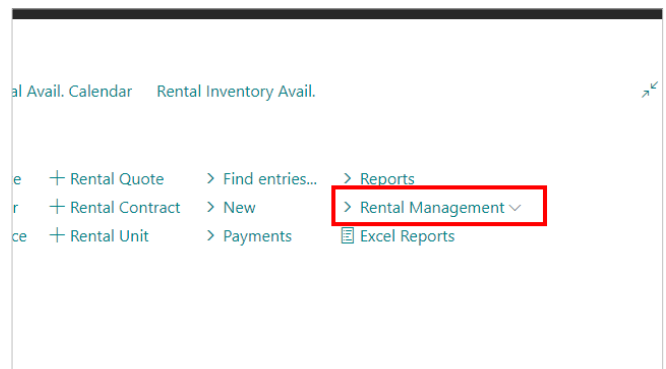
- When from the Rental Line, Group Availability Matrix, select either the Rental Group Availability Calendar or Rental Unit Availability Calendar. The Rental Group Availability Calendar is automatically filtered by Group Availability and the Group No. on the rental line. The Rental Unit Availability Calendar is automatically filtered by the Group Unit Availability option and the Group No. on the rental line.

View Style Records:

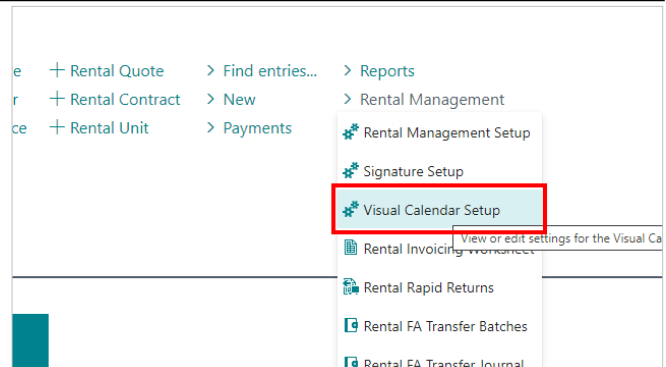
A listing of the calendar entries making up the view styles which specify the types of availability bars that are displayed in the calendars. And what colors the bars, text and outline of the bars are set to. The Style records of the calendar entries and colors are populated by default.

The calendar entry records cannot be deleted, or additional entry types added. The color styles for the Background Color, Text Color and Border Color on the records can be changed.

Click on the navigation menu item popup **Rental Management**



Click on the link **Visual Calendar Setup**



The following picture displays the Visual Calendar Setup.

Visual Calendar Setup

RENTAL AVAILABILITY

Reset Styles
Actions
Fewer options

General

Code RENTAL AVAILABILITY
Open with Filter Opti... ☒

Description Rental Availability

View Styles
Manage

Table No.	Table Name	Field Value	Background Color	Text Color	Border Color
→ 70014276	Availability Calendar Entry	Group Available	#59CCB4	#000000	#59CCB4
70014276	Availability Calendar Entry	Group on Rent	#75D8E7	#000000	#75D8E7
70014276	Availability Calendar Entry	Group Reserved	#A7ADB6	#000000	#A7ADB6
70014276	Availability Calendar Entry	Group Reserved Unassigned Units	#E65E6D	#000000	#E65E6D
70014276	Availability Calendar Entry	Unit On Rent	#75D8E7	#000000	#75D8E7
70014276	Availability Calendar Entry	Unit Reserved	#A7ADB6	#000000	#A7ADB6
70014276	Availability Calendar Entry	Unit Unavailable - Service	#E89E63	#000000	#E89E63

The following displays how the default color schemes look on the calendar bars depicting the group available quantity, reserved, on-rent and reserved for a group but not assigned to units are displayed in the calendars.

Rental Avail. Calendar: All Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day

Availability Option: Group Availability, Start Date: 05/08/22

May 8 – 14, 2022

Rental Unit	Location Code	Description	5/8	5/9	5/10	5/11	5/12	5/13	5/14
RU00001		Buckeye Ditcher Group	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved	5 Available 1 Reserved
BD-006	EAST	Buckeye Ditcher							
RU00002	WEST	Buckeye Ditcher							
RU00003	EAST	Buckeye Ditcher	4 Unavailable due to Service Status						
RU00004	EAST	Buckeye Ditcher							
RU00005	WEST	Buckeye Ditcher							
RU00006	WEST	Buckeye Ditcher							
RU00008		18 G Brad Nailers Group	7 Available	5 Available 2 On Rent	5 Available 2 On Rent	3 Available 2 Reserved 2 On Rent	3 Available 2 Reserved 2 On Rent	3 Available 2 Reserved 2 On Rent	3 Available 2 Reserved 2 On Rent
						Reserved: RC00009 - Adatum Corporation Reserved: RC00009 - Adatum Corporation			
RU00008-001	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-002	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-003	EAST	18 G Brad Nailer							
RU00008-004	EAST	18 G Brad Nailer							
RU00008-005	WEST	18 G Brad Nailer							
RU00008-006	WEST	18 G Brad Nailer							
RU00008-007	WEST	18 G Brad Nailer							

Click on the cell **Table No.** with the value **70014276**

Select the record for the calendar bar that you want to change the colors on.

Table No.	Field Value	Background Color	Text Color
→ 70014276	Group Available	#59CCB4	#000000
70014276	Group on Rent	#75B5E7	#000000
70014276	Group Reserved	#A7ADB6	#000000
70014276	Group Reserved Unassigned Units	#E65E6D	#000000
70014276	Unit On Rent	#75B5E7	#000000
70014276	Unit Reserved	#A7ADB6	#000000
70014276	Unit Unavailable - Service	#E89E63	#000000

Click on the navigation menu item popup **Manage**

Reset Styles
More options

General

Code RENTAL AVAILABILITY D

View Styles **Manage**

Table No.	Table Name	Field Value
70014276	Availability Calendar Entry	Group Availa
70014276	Availability Calendar Entry	Group on Re
70014276	Availability Calendar Entry	Group Reser

Click on the navigation menu item **Change Style**

General

Code RENTAL AVAILABILITY

View Styles [Manage](#)

Change Style

View or edit the color styles for the selected record

70014276	Availability Calendar Entry
70014276	Availability Calendar Entry
70014276	Availability Calendar Entry
70014276	Availability Calendar Entry
70014276	Availability Calendar Entry

The following steps demonstrate changing the Background Color of the calendar bar.

On the Edit - Color Picker window, an Example Text field displays how the selected colors in each field look like for the select calendar bar.

Click on **#E89E63**

Code RENTAL AVAILABILITY

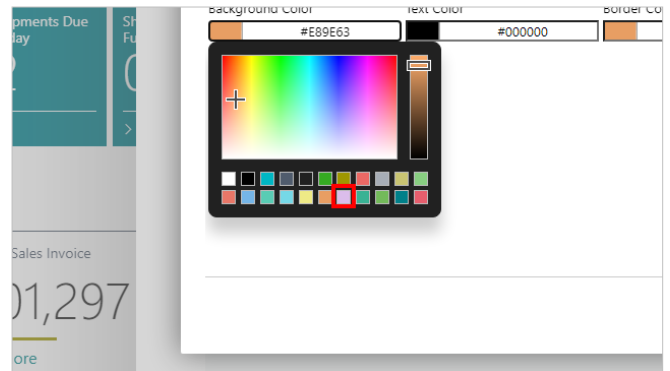
Edit - Color Picker

Example Text

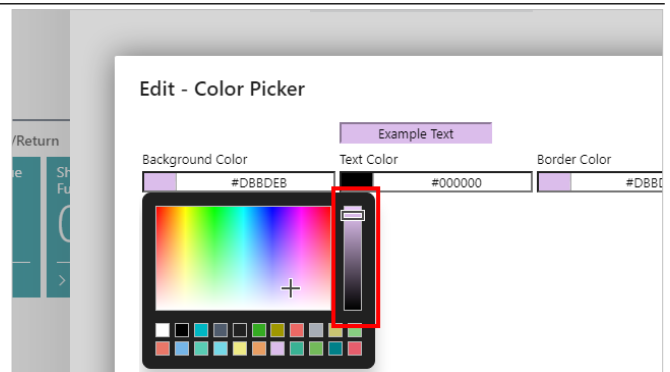
Background Color **#E89E63** Text Color #000000

Click on one of the color boxes

Optionally you can click within the colors in the window to select a color. The plus sign will move to where clicked.



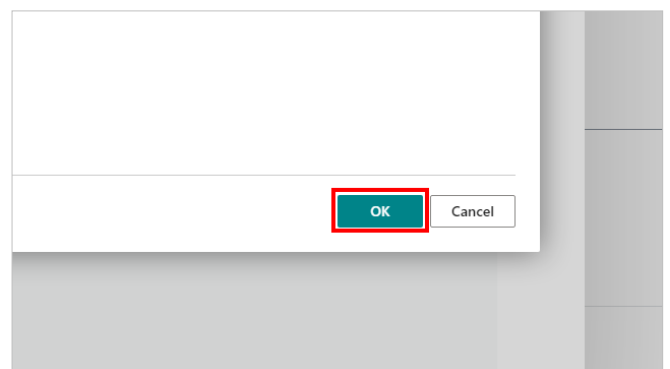
Click on the slide bar to modify the color.



Note that the Example Text field is updated to display how the calendar bar will look with the newly selected Background Color.

If you want to change the Text color or Border, repeat the steps demonstrated for changing the Background Color.

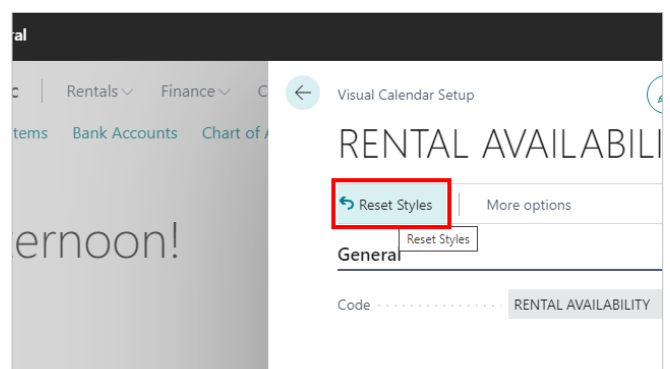
Click on the button **OK**



If after modifying the colors and decide that the color combinations of the default settings is preferred the Styles can be reset to the default styles from the Visual Calendar Setup.

The following demonstrates how to reset the color styles.

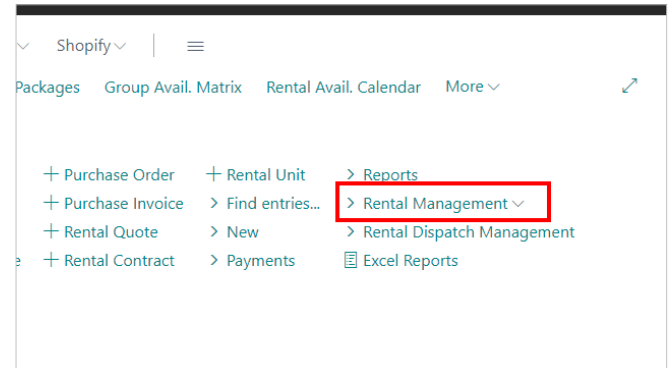
Click on the navigation menu item **Reset Styles**



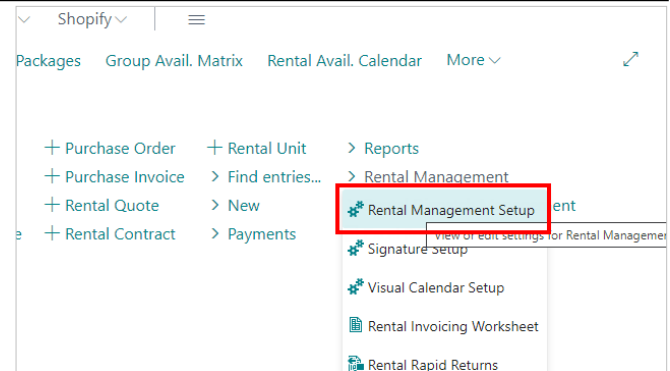
3.2.3.2.3.

How to Setup a Default Calendar Period

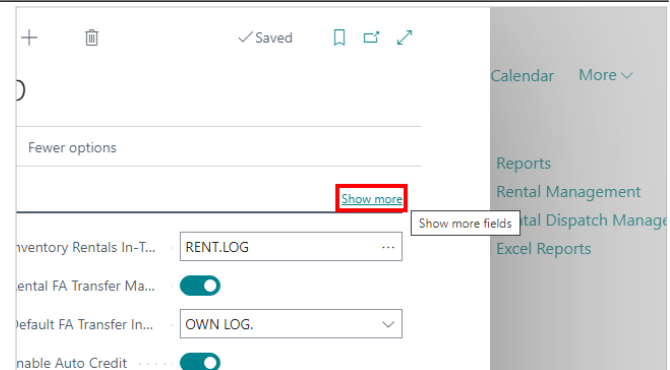
Click on the navigation menu item popup **Rental Management**



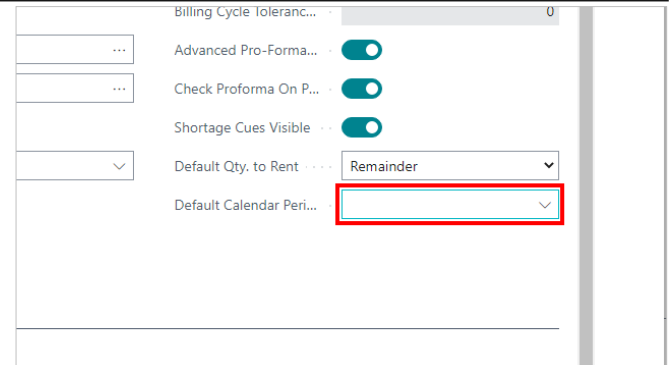
Click on the navigation menu item **Rental Management Setup**



Click on the button **General, Show more**

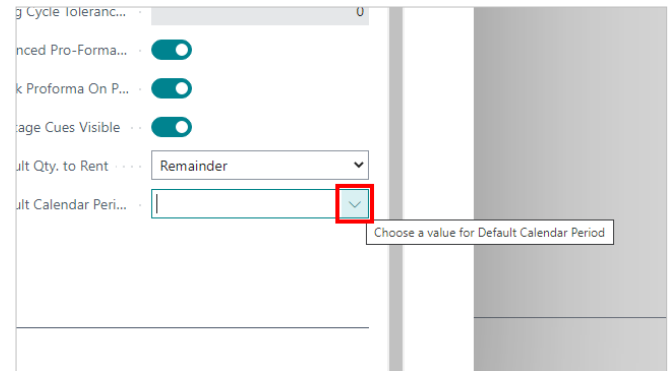


Click on the field **Default Calendar Period**



ODT Rentals Online Help

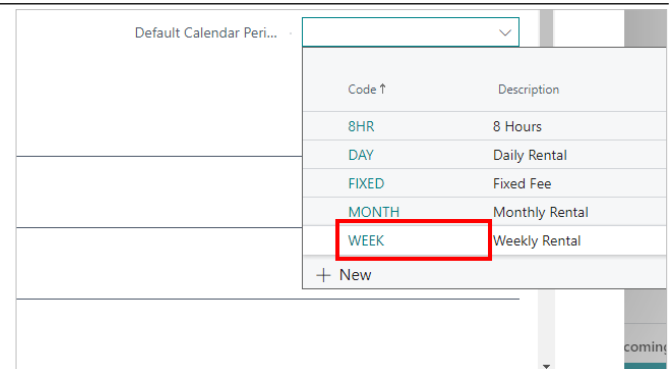
Click on the lookup button **Default Calendar Period**



Click on the link in cell **Code** with the value **WEEK**

When opening the Availability Calendar from the Rental Line, Manage menu, the calendar display the sets based on the number of days related to the Rental Period selected.

In this example, the calendar sets will display 7 days as the WEEK rental period was selected.



3.2.3.3.

Global Rental Availability Calendars

3.2.3.3.1.

Overview

The global Rental Avail. Calendar and the Group Availability Matrix availability calendars contain the same general and processing features.

When on the Visual Calendar Setup, General tab the Open with Filter Option is not enabled the availability calendars are populated based on a defaulted Availability Option and Start Date. Filters can then be modified, or additional filters set on the Rental Availability Calendar.

If the Open with Filter Option is enabled, then when the availability calendar is selected the Rental Availability Calendar Filter page opens, which provides the ability to modify the filters or set additional filters prior to the calendar being populated.

The Open with Filter Option field setting does not apply to the Group Availability Matrix, Rental Unit Availability Calendar.

3.2.3.3.2.

Availability Options

Group Availability and All Option

With the Group Availability option, the calendar contains a group section for each group followed by the Rental Units assigned to the group.

With the All option, the calendar contains a group section for each group followed by the Rental Units assigned to the group plus Rental Units that are not assigned to a group nor linked to an Item.

Using the Collapse All menu option the groups can all be collapsed, and then the desired groups can be expanded to display the assigned Rental Units.

The Group Availability and All option display a summary section for each group which contains per day:

- the available quantity of Rental Units assigned to the group
- the total reserved quantity that exists for the rental group, which includes the reservations for rental units selected, not selected and units that are not available due to a Service Status



- the total quantity of the group units that are out on rent
- Individual reserved bars with a rental document no. that reservations exist on for group child unit rental lines where the unit has not been selected

The Rental Unit sections display colored bars depicting:

Reserved

- Reservations for Rental Contract, Rental Lines
- Reservations for Rental Quote, Rental Lines where Commit Reservation is ticked

Reserved due to Service Status

- Reservations for when a Rental Unit is unavailable due to a Service Status change. Normally only have start day and no ending date.

On-Rent

- Reservations for Rental Units that are out on rent

NOTE:

Sub-Rental Units assigned to rental groups are not included in the group quantities, nor is the sub-rental unit displayed on the calendars.

Group Unit Availability and Unit Availability Options

The following shows the calendar when the Availability Option is set to Group Unit Availability, which displays the Rental Units which are assigned to groups.

Rental Avail. Calendar: All Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day ...									
Availability Option: Group Unit Availability, Start Date: 05/09/22									
May 8 – 14, 2022									
Free Preview Mode									
Rental Unit	Location Code	Description	5/8 Sun	5/9 Mon	5/10 Tue	5/11 Wed	5/12 Thu	5/13 Fri	5/14 Sat
BD-006	EAST	Buckeye Ditcher							
RU00002	WEST	Buckeye Ditcher							
RU00003	EAST	Buckeye Ditcher	Unavailable due to Service Status						
RU00004	EAST	Buckeye Ditcher							
RU00005	WEST	Buckeye Ditcher							
RU00006	WEST	Buckeye Ditcher							
RU00008-001	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-002	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-003	EAST	18 G Brad Nailer							
RU00008-004	EAST	18 G Brad Nailer							
RU00008-005	WEST	18 G Brad Nailer							
RU00008-006	WEST	18 G Brad Nailer							
RU00008-007	WEST	18 G Brad Nailer							
RU00009-001	EAST	16 G Brad Nailer							
RU00009-002	EAST	16 G Brad Nailer							
RU00009-003	EAST	16 G Brad Nailer							
RU00009-004	WEST	16 G Brad Nailer							
RU00009-005	WEST	16 G Brad Nailer							
RU00010-001	EAST	Framing Air Nailer	Reserved: RC00001 - Trey Research, Location: EAST						
RU00010-002	EAST	Framing Air Nailer	Reserved: RC00001 - Trey Research, Location: EAST						

The following shows the calendar when the Availability Option is set to Unit Availability, which displays the Rental Units which are not assigned to groups nor linked to an Item.

Rental Avail. Calendar: All Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day ...									
Availability Option: Unit Availability, Start Date: 05/09/22									
May 8 – 14, 2022									
Free Preview Mode									
Rental Unit	Location Code	Description	5/8 Sun	5/9 Mon	5/10 Tue	5/11 Wed	5/12 Thu	5/13 Fri	5/14 Sat
RU00007		16 G Brad Nailer							
				Reserved: RC00012 - Adatum Corporation, Location: EAST					

The Rental Unit sections display colored bars depicting:

Reserved

- Reservations for Rental Contract, Rental Lines
- Reservations for Rental Quote, Rental Lines where Commit Reservation is ticked.

Reserved due to Service Status

- Reservations for when a Rental Unit is unavailable due to a Service Status change. Normally only have start day and no ending date.

On-Rent

- Reservations for Rental Units that are out on rent

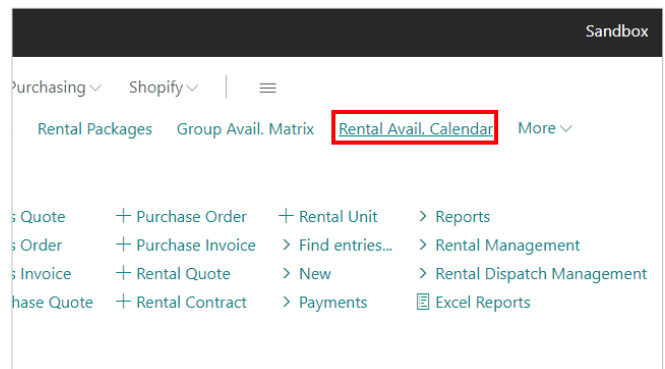
3.2.3.3.3.

Rental Avail. Calendar

The Rental Avail. Calendar can be accessed via the Business Manager and Sales Order Processor role centers menu or via search.

The following demonstrates opening the Rental Avail. Calendar from the Business Manager role center. The menu option is also available on the Sales Order Processor role center.

Click on the navigation menu item **Rental Avail. Calendar**



The following picture displays the global Rental Avail. Calendar accessed from the Business Manager Role Center.

Rental Avail. Calendar: All Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day									
Availability Option: Group Availability, Start Date: 05/08/22									
May 8 – 14, 2022									
Rental Unit	Location Code	Description	5/8	5/9	5/10	5/11	5/12	5/13	5/14
RU00001	BD-006	EAST	Buckeye Ditcher Group	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available
				1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved
RU00002	WEST	Buckeye Ditcher							
RU00003	EAST	Buckeye Ditcher	4 Unavailable due to Service Status						
RU00004	EAST	Buckeye Ditcher							
RU00005	WEST	Buckeye Ditcher							
RU00006	WEST	Buckeye Ditcher							
RU00008	18 G Brad Nailers Group			7 Available	5 Available	5 Available	3 Available	3 Available	3 Available
					2 On Rent	2 On Rent	2 Reserved	2 Reserved	2 Reserved
							2 On Rent	2 On Rent	2 On Rent
							Reserved: RC00009 - Adatum Corporation		
							Reserved: RC00009 - Adatum Corporation		
RU00008-001	EAST	18 G Brad Nailers		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-002	EAST	18 G Brad Nailers		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-003	EAST	18 G Brad Nailers							
RU00008-004	EAST	18 G Brad Nailers							
RU00008-005	WEST	18 G Brad Nailers							
RU00008-006	WEST	18 G Brad Nailers							
RU00008-007	WEST	18 G Brad Nailers							

By default, the calendar displays the availability based on:

- The Availability Option of Group Availability
- The Start Date which defaults from the Users' Work Date and can be overridden in the Filters
- A weekly calendar set commencing with Sunday in which the Start Date falls within, which can be changed on the calendar

3.2.3.3.4.

Group Availability Matrix Availability Calendars

The Group Availability Matrix accessed from the Business Manager and Sales Order Processor role centers menu, the Rental Management menu in the Actions, or by using Search provides 2 views of the Rental Availability Calendar.

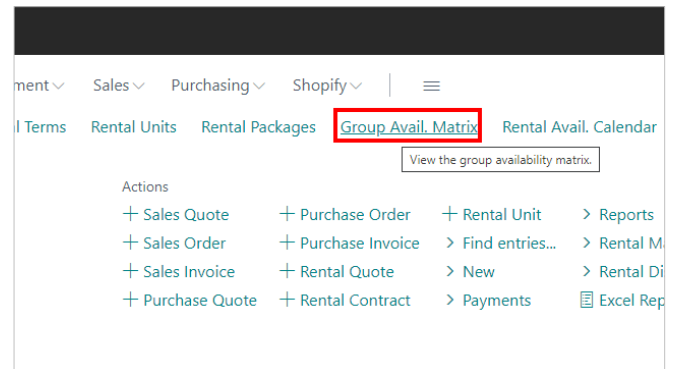
- The Rental Group Availability Calendar
- The Rental Unit Availability Calendar with the Availability Option set to Group Unit Availability and the Group No. of the selected group line in the Group Availability Matrix.

Group Availability Matrix – Rental Group Availability Calendar

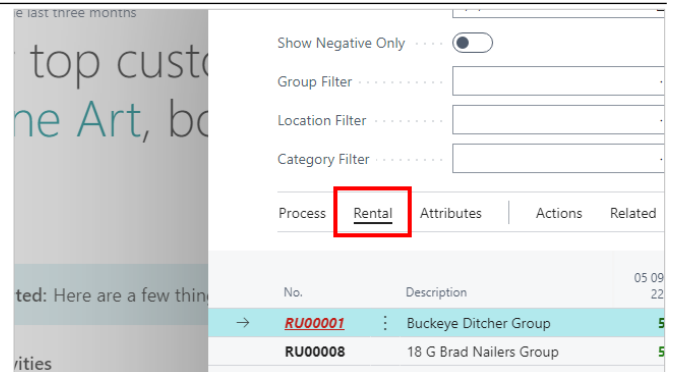
The following demonstrates opening the Group Availability Matrix – Rental Group Availability Calendar from the Business Manager role center.

The Group Availability Matrix menu option is also available on the Sales Order Processor role center or can be accessed using Search.

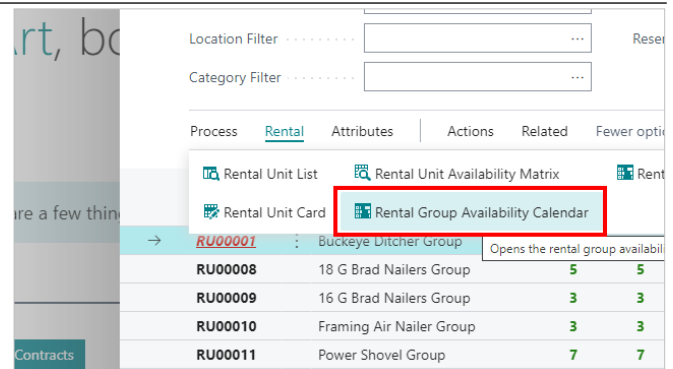
Click on the navigation menu item **Group Avail. Matrix**



Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Group Availability Calendar**



The following picture displays the Rental Group Availability Calendar, which displays the same view as the Rental Avail. Calendar.

Edit - Rental Availability Calendar

Today

Previous

Next

Filters

Filter By Attributes

Clear Attributes Filter

Expand All

Collapse All

Refresh

Day

Week

Month

More options

Availability Option: Group Availability, Start Date: 05/09/22

May 8 – 14, 2022

Free Preview Mode

Rental Unit	Location Code	Description	5/8	5/9	5/10	5/11	5/12	5/13	5/14
			Sun	Mon	Tue	Wed	Thu	Fri	Sat
<div> <div>RU00001</div> <div>Buckeye Ditcher Group</div> </div>			<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>	<div>5 Available</div> <div>1 Reserved</div>
<div> <div>BD-006</div> <div>EAST</div> <div>Buckeye Ditcher</div> </div>									
<div> <div>RU00002</div> <div>WEST</div> <div>Buckeye Ditcher</div> </div>									
<div> <div>RU00003</div> <div>EAST</div> <div>Buckeye Ditcher</div> </div>		<div>4 Unavailable due to Service Status</div>							
<div> <div>RU00004</div> <div>EAST</div> <div>Buckeye Ditcher</div> </div>									
<div> <div>RU00005</div> <div>WEST</div> <div>Buckeye Ditcher</div> </div>									
<div> <div>RU00006</div> <div>WEST</div> <div>Buckeye Ditcher</div> </div>									
<div> <div>RU00008</div> <div>18 G Brad Nailers Group</div> </div>		<div>7 Available</div>	<div>5 Available</div> <div>2 On Rent</div>	<div>5 Available</div> <div>2 On Rent</div>	<div>3 Available</div> <div>2 Reserved</div> <div>2 On Rent</div> <div>Reserved: RC00009 - Adatum Corporation</div>	<div>3 Available</div> <div>2 Reserved</div> <div>2 On Rent</div>	<div>3 Available</div> <div>2 Reserved</div> <div>2 On Rent</div>	<div>3 Available</div> <div>2 Reserved</div> <div>2 On Rent</div>	
<div> <div>RU00008-001</div> <div>EAST</div> <div>18 G Brad Nailers</div> </div>			<div>On Rent: RC00011 - Adatum Corporation, Location: EAST</div>						
<div> <div>RU00008-002</div> <div>EAST</div> <div>18 G Brad Nailers</div> </div>			<div>On Rent: RC00011 - Adatum Corporation, Location: EAST</div>						
<div> <div>RU00008-003</div> <div>EAST</div> <div>18 G Brad Nailers</div> </div>									
<div> <div>RU00008-004</div> <div>EAST</div> <div>18 G Brad Nailers</div> </div>									
<div> <div>RU00008-005</div> <div>WEST</div> <div>18 G Brad Nailers</div> </div>					<div>Reserved: RC00009 - Adatum Corporation, Location: WEST</div>				
<div> <div>RU00008-006</div> <div>WEST</div> <div>18 G Brad Nailers</div> </div>									
<div> <div>RU00008-007</div> <div>WEST</div> <div>18 G Brad Nailers</div> </div>									
<div> <div>RU00009</div> <div>16 G Brad Nailers Group</div> </div>		<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	<div>3 Available</div> <div>2 Reserved</div>	
<div> <div>RU00009-001</div> <div>EAST</div> <div>16 G Brad Nailers</div> </div>									

Close

By default, the calendar displays the availability based on:

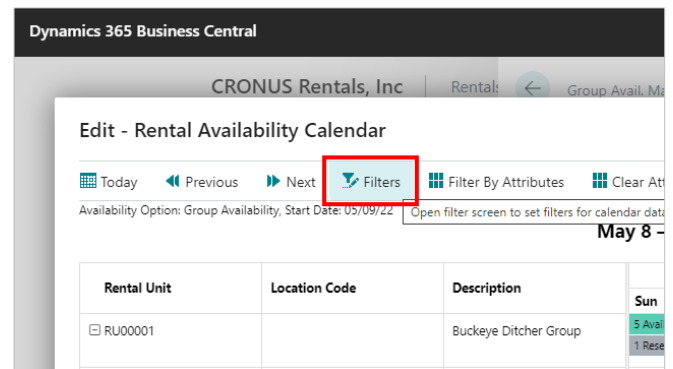
- The Availability Option of Group Availability.
- The Start Date which defaults from the Start Date on the Group Availability Matrix and can be overridden in the Filters.
- A weekly calendar set commencing with Sunday in which the Start Date falls within, which can be changed on the calendar.

NOTE:

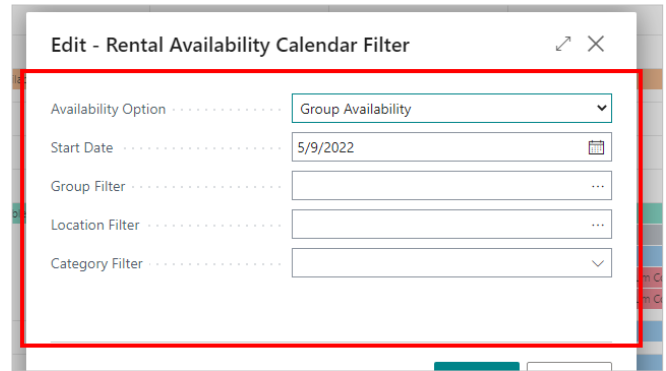
When on the Group Avail. Matrix the date on the Start Date field, and if a Group Filter or Location Filter are set prior to opening the Rental Group Availability Calendar, then these filters flow to the Rental Group Availability Calendar, Filters.

The following demonstrate how to access the Filters page to set filters on the calendar.

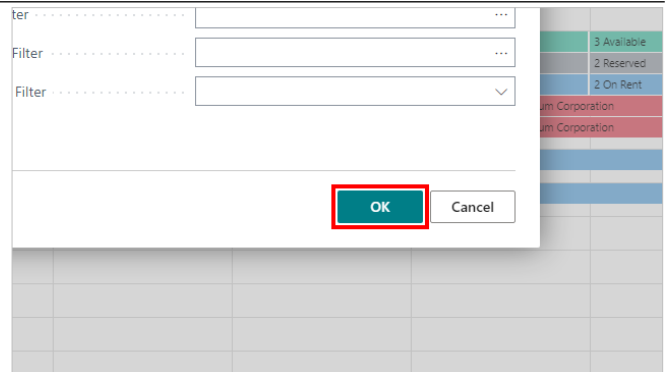
Click on the navigation menu item **Filters**



Click on the applicable filtering field to set filters.



Click on the button **OK**

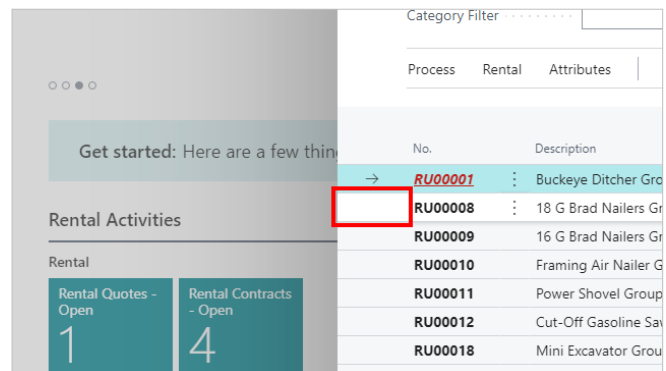


Group Availability Matrix – Rental Unit Availability Calendar

The following demonstrates opening the Group Availability Matrix – Rental Unit Availability Calendar from the global Group Availability Matrix.

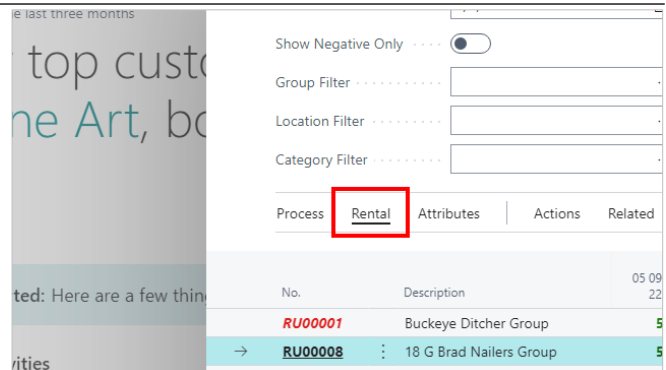
Click on **No. = RU00008, Description = 18 G Brad Nailers Group, 05 09 22 = 5**

Select the matrix line containing the rental group you want to see the assigned units availability.

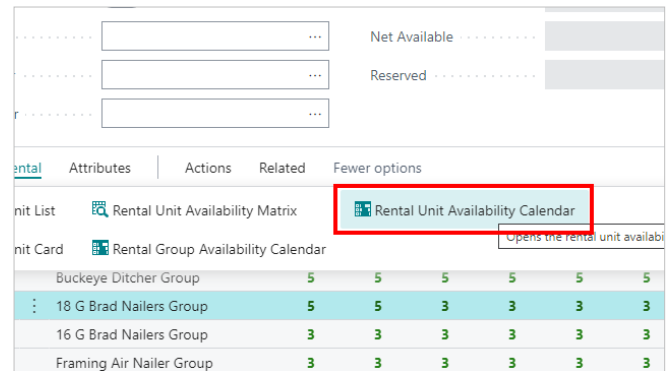


No.	Description	Availability
RU00001	Buckeye Ditcher Gro	3 Available
RU00008	18 G Brad Nailers Gr	2 Reserved
RU00009	16 G Brad Nailers Gr	2 On Rent
RU00010	Framing Air Nailer G	
RU00011	Power Shovel Group	
RU00012	Cut-Off Gasoline Sav	
RU00018	Mini Excavator Grou	

Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Unit Availability Calendar**



Net Available	Reserved
...	...
...	...
...	...

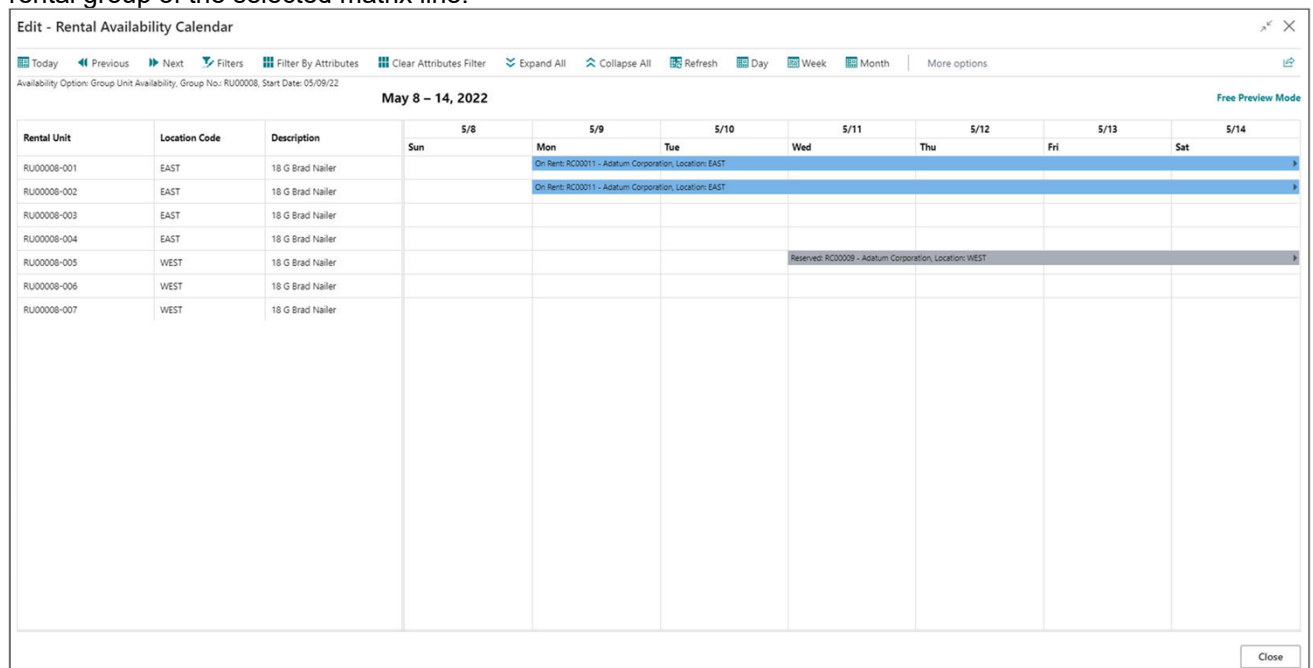
[Rental Unit Availability Calendar](#)

[Rental Group Availability Calendar](#)

[Opens the rental unit availability](#)

Group	5	5	5	5	5	5
Buckeye Ditcher Group	5	5	5	5	5	5
18 G Brad Nailers Group	5	5	3	3	3	3
16 G Brad Nailers Group	3	3	3	3	3	3
Framing Air Nailer Group	3	3	3	3	3	3

The following picture displays the Rental Unit Availability Calendar containing the Rental Units assigned to the rental group of the selected matrix line.



Edit - Rental Availability Calendar

Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Day Week Month More options

Availability Option: Group Unit Availability, Group No.: RU00008, Start Date: 05/09/22

May 8 - 14, 2022

Free Preview Mode

Rental Unit	Location Code	Description	5/8	5/9	5/10	5/11	5/12	5/13	5/14
			Sun	Mon	Tue	Wed	Thu	Fri	Sat
RU00008-001	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-002	EAST	18 G Brad Nailer		On Rent: RC00011 - Adatum Corporation, Location: EAST					
RU00008-003	EAST	18 G Brad Nailer							
RU00008-004	EAST	18 G Brad Nailer							
RU00008-005	WEST	18 G Brad Nailer				Reserved: RC00009 - Adatum Corporation, Location: WEST			
RU00008-006	WEST	18 G Brad Nailer							
RU00008-007	WEST	18 G Brad Nailer							

Close

By default, the calendar displays the availability based on:

- The Availability Option of Group Unit Availability.
- The Start Date which defaults from the Start Date on the Group Availability Matrix, which can be modified in the Filters.
- The Group filter is automatically set to the Group No. related to the group line the cursor was on when opening the Rental Unit Availability Calendar, which can be modified in the Filters.
- A weekly calendar set commencing with Sunday in which the Start Date falls within, which can be changed on the calendar.

3.2.3.3.5. Processing Features

The following outlines the processes related to Reserved Bars within the group section and on Rental Unit lines.

Assigning and un-assigning of Rental Units within a Rental Group

- Can assign Rental Unit by dragging and dropping the Reserved bar with a rental document no. from the group section onto an available Rental Unit record within the group. The Rental Unit No. field on the rental document, group child rental line will be updated with the Rental Unit No.
- Can un-assign Rental Unit by dragging the bar back to the group section. This will show the bar as

Reserved in the group section. On the rental document, Rental Line the Rental Unit No. field will be cleared.

Change the Rental Unit for a Reserved bar on a unit record

- When a Rental Unit has been reserved, it can be changed to a different Rental Unit by dragging the bar to another Rental Unit section, which will update the Rental Line with the new unit.

Modify when the rental starts and ends

- Can click on and drag the Reserved bar with a rental document no. in the Group section or on a Rental Unit section to the left or right to change when the rental commences and ends for the rental line the Reserved bar is related to.
- Can change the date the rental is to commence on a Reserved bar in the Group section or a Rental Unit section by clicking and holding on the beginning of a bar and drag it to the left.
- Can extend the length of the rental on a Reserved by clicking and holding on the end of a bar and drag it to the right the Reserved bar with a rental document no. in a Rental Unit section to the left or right to change when the rental commences and ends for the rental line the Reserved bar is related to.

NOTE:

When the unit is within a Rental Package the moving of the bar to an earlier date cannot be an earlier date than the Rental Package line, Rental Start Date. And the extending the end of the bar to a later date cannot be later than the Rental Package line, Rental Return Date.

The following modification can be done on the bars indicating the Rental Unit is out on rent.

- Extend the rental to a later date by clicking on the end of the bar and when a double arrow shape appears drag the bar to the left to the new expected Rental Return Date.

NOTE:

When the unit is within a Rental Package the extending of the date to a later date cannot be later than the Rental Package line, Rental Return Date.

When the calendar is closed the changes made in the calendar will update the Rental Lines on the applicable rental document.

3.2.3.4. Rental Line Availability Calendars

3.2.3.4.1. Overview

From the Rental Line, Manage Menu the Rental Availability Calendars include:

The Availability Calendar, which opens the Rental Availability Calendar Select which is similar to the global Rental Availability Calendar. However, provides an additional processing feature of being able to automatically select Rental Units to create new Rental Lines.

The Group Availability Matrix accessed from the rental lines' Manage menu which provides two views of the Rental Availability Calendar that have a default Availability Option set.

- The Rental Group Availability Calendar with the Availability Option set to Group Availability and the Group Filter set to the related group of the line the cursor is on.
- The Rental Unit Availability Calendar with the Availability Option set to Rental Unit Group Availability and the Group No. of the selected group line in the Group Availability Matrix.

The number of days displayed in the calendar sets on all rental line calendars is determined based on the following:

- When a Rental Term is specified on the General Tab of the rental document the number of days displayed per set will be based on the Rental Period of the Rental Term.

- If not specified, then if on Rental Management Setup, General Tab a Default Calendar Period is specified, the number of days of the Period Code will be used to set the number of days to display in the calendar sets.
- If there is not a Rental Term on the General Tab of the rental document, nor a Default Calendar Period specified, then the number of days displayed in the calendar sets will default to 30 days.

By default, the Filters page is not displayed prior to populating the calendar.

The Filters page provides the same filtering options as noted in the global Rental Availability Calendar help, therefore, will not be repeated here.

The Visual Calendar Setup provides the field, Open with Filter Options and when enabled displays the Filters page prior to populating the calendar. An exception to this is when the rental line the cursor is on has a Rental Group, then the Filters page will not be displayed prior to populating the calendar.

3.2.3.4.2. Rental Line - Availability Calendar

On the Rental Quote and Rental Contract, the Availability Calendar is accessed from the Rental lines, Manage menu option.

When opening the Availability Calendar, the calendar view that is displayed is based on the following.

The Filters, Availability Option is set to All by default.

When opening the Availability Calendar from the Rental Lines, the view is automatically set to the menu option of Rental Period, which means the first date displayed in the calendar view will be based on the Filters, Start Date.

The Filters, Start Date field is set depending on whether the cursor is on a blank line, or is on a line that has a Rental Group or Rental Unit selected.

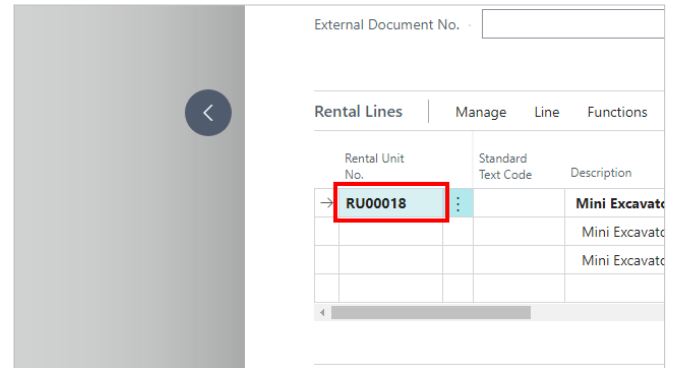
- When on a rental line that is blank and open the Availability Calendar the Filters, Start Date is set to the Document Date.
 - When on a rental line that has a Rental Group or a Rental Unit, the Filters, Start Date is set to the Rental Start Date on the line.
- Therefore, the first date displayed in the calendar view will be either the Document Date or the Rental Line, Rental Start Date.

The Filters, Group Filter will be set to the group on the rental line if the cursor is on a Rental Line that has a Rental Group prior to opening the Availability Calendar. The calendar will display only the group and the units assigned to the group.

The following demonstrates opening the calendar on a Rental Contract that does not have a Rental Term on the General Tab, nor has a Default Rental Period been setup on Rental Management Setup.

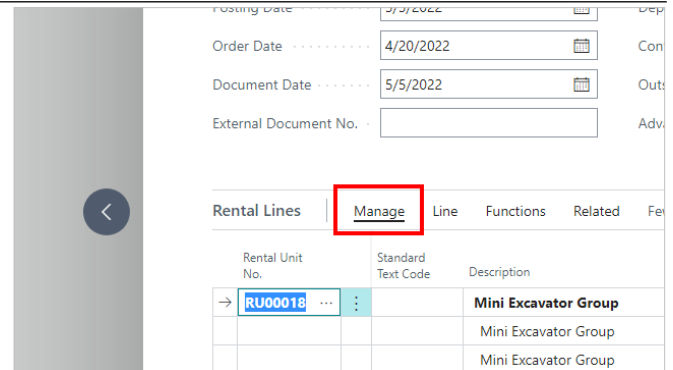
The calendar will be opened when on a Rental Group line with a Rental Quantity of 2 and the child units have not been selected which have a Rental Start Date of May 7.

Click on the cell **Rental Unit No.** with the value **RU00018**



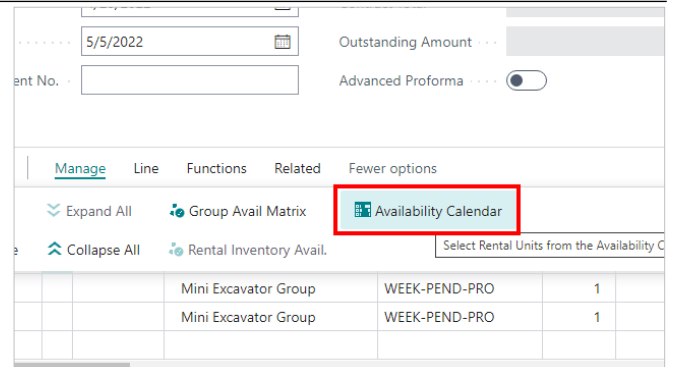
Rental Unit No.	Standard Text Code	Description
RU00018		Mini Excavator
		Mini Excavator
		Mini Excavator

Click on the navigation menu item popup **Manage**



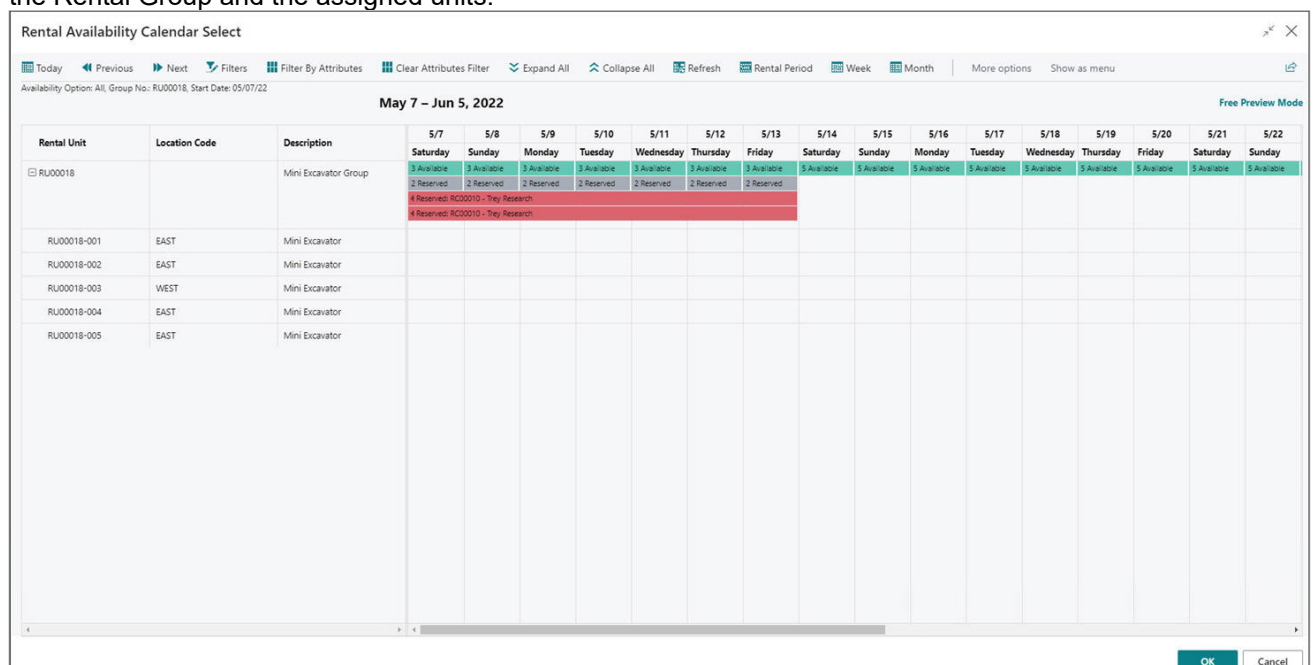
Rental Unit No.	Standard Text Code	Description
RU00018		Mini Excavator Group
		Mini Excavator Group
		Mini Excavator Group

Click on the navigation menu item **Availability Calendar**



Rental Unit No.	Standard Text Code	Description
RU00018		Mini Excavator Group
		Mini Excavator Group
		Mini Excavator Group

The following picture displays the Rental Availability Calendar Select which is automatically filtered to display the Rental Group and the assigned units.



Rental Availability Calendar Select

Today Previous Next Filters Filter By Attributes Clear Attributes Filter Expand All Collapse All Refresh Rental Period Week Month More options Show as menu

Availability Option: All, Group No: RU00018, Start Date: 05/07/22

May 7 - Jun 5, 2022

Rental Unit	Location Code	Description	5/7	5/8	5/9	5/10	5/11	5/12	5/13	5/14	5/15	5/16	5/17	5/18	5/19	5/20	5/21	5/22
RU00018		Mini Excavator Group	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available
RU00018-001	EAST	Mini Excavator	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available
RU00018-002	EAST	Mini Excavator	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available
RU00018-003	WEST	Mini Excavator	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available
RU00018-004	EAST	Mini Excavator	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available
RU00018-005	EAST	Mini Excavator	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available	Available

OK Cancel

NOTE:

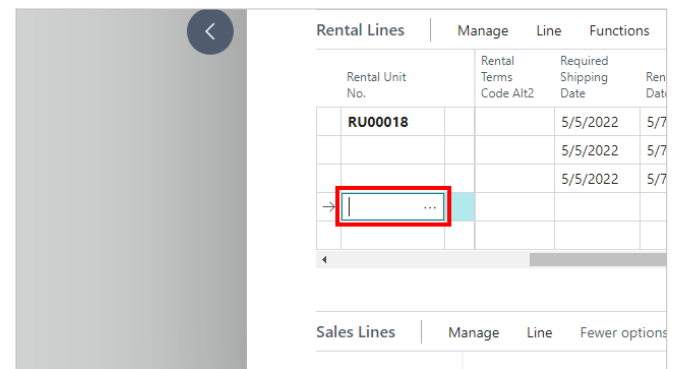
The dates covered by the bars are based on the date in the Starting Date-Time field of the Reservation Entries. This field is populated based on the Required Shipping Date on the Rental Line, which may be earlier than the Rental Start Date.

When there is a black triangle at the beginning or end of the displayed Reserved bar, this indicates the reservation covers dates in a previous and/or next set of dates.

The following demonstrates opening the Availability Calendar when on a blank Rental line. The Document Date on the Rental Contract is May 5.

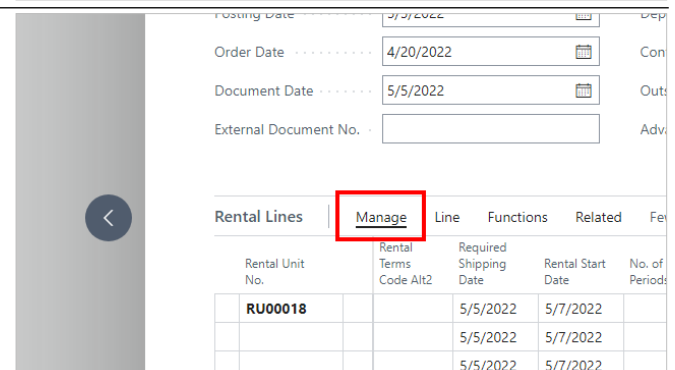
Click on the cell **Rental Unit No.**

Select a blank rental line.



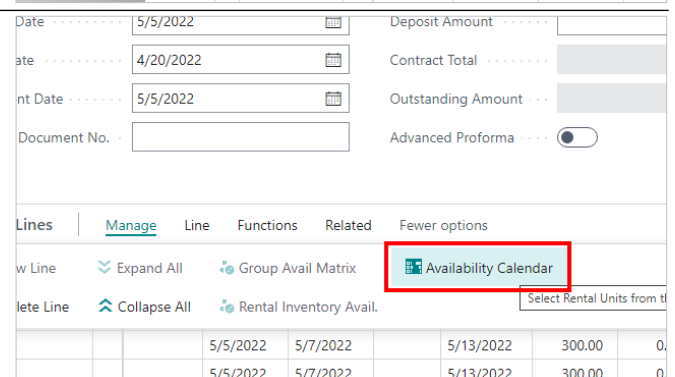
Rental Unit No.	Rental Terms Code Alt2	Required Shipping Date	Rental Start Date
RU00018		5/5/2022	5/7/2022
		5/5/2022	5/7/2022
		5/5/2022	5/7/2022

Click on the navigation menu item popup **Manage**



Rental Unit No.	Rental Terms Code Alt2	Required Shipping Date	Rental Start Date	No. of Periods
RU00018		5/5/2022	5/7/2022	
		5/5/2022	5/7/2022	
		5/5/2022	5/7/2022	

Click on the navigation menu item **Availability Calendar**



Date	5/5/2022	5/7/2022	5/13/2022	300.00	0.
Contract Total					
Outstanding Amount					

The following picture displays the Rental Availability Calendar Select, which opens with the Availability Option of All and a Start Date of May 5.

The Start Date and thus the first calendar day displayed is May 5 which is based on the Document Date of the Rental Contract.



Rental Availability Calendar Select

Today

Previous

Next

Filters

Filter By Attributes

Clear Attributes Filter

Expand All

Collapse All

Refresh

Rental Period

Week

Month

More options

Show as menu

Availability Option: All, Start Date: 05/05/22

May 5 – Jun 3, 2022

Free Preview Mode

Rental Unit	Location Code	Description	5/5	5/6	5/7	5/8	5/9	5/10	5/11	5/12	5/13	5/14	5/15	5/16	5/17	5/18	5/19	5/20	5/21	5/22				
			Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday				
<input type="checkbox"/> RU00001		Buckeye Ditcher Group	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available				
			1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved	1 Reserved				
BD-006	EAST	Buckeye Ditcher																						
RU00002	WEST	Buckeye Ditcher																						
RU00003	EAST	Buckeye Ditcher	4 Unavailable due to Service Status																					
RU00004	EAST	Buckeye Ditcher																						
RU00005	WEST	Buckeye Ditcher																						
RU00006	WEST	Buckeye Ditcher																						
RU00007		16 G Brad Nailers																						
<input type="checkbox"/> RU00008		18 G Brad Nailers Group	7 Available	7 Available	7 Available	7 Available	5 Available	5 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available	3 Available				
								2 On Rent	2 On Rent	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved	2 Reserved				
										2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent	2 On Rent				
										Reserved: RC00009 - Adatum Corporation														
										Reserved: RC00009 - Adatum Corporation														
RU00008-001	EAST	18 G Brad Nailers						On Rent: RC00011 - Adatum Corporation, Location: EAST																
RU00008-002	EAST	18 G Brad Nailers						On Rent: RC00011 - Adatum Corporation, Location: EAST																
RU00008-003	EAST	18 G Brad Nailers																						
RU00008-004	EAST	18 G Brad Nailers																						
RU00008-005	WEST	18 G Brad Nailers																						
RU00008-006	WEST	18 G Brad Nailers																						
RU00008-007	WEST	18 G Brad Nailers																						
			5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available	5 Available				

OK

Cancel

3.2.3.4.3. Rental Line - Group Availability Matrix Calendars

The availability calendars accessed from the Group Availability Matrix provide the same general and processing features as the global Rental Availability Calendars.

Please review the Visual Availability Calendars Overview and the Global Rental Availability Calendars user help for information on the features.

3.2.3.4.4. Processing Features from the Availability Calendar

The processing features outlined in the global Rental Availability Calendar user help are available on the Availability Calendar as well.

Please review the Processing Features chapter in the Global Rental Availability Calendar user help.

In addition to those features, the Availability Calendar provides that ability to select rental units on the Availability Calendar to add to the Rental Lines.

When Rental Units assigned to a group are selected, the Rental Lines will be populated with both the group and the selected units.

Therefore, this process should be done when opening the Availability Calendar from a blank Rental Line.

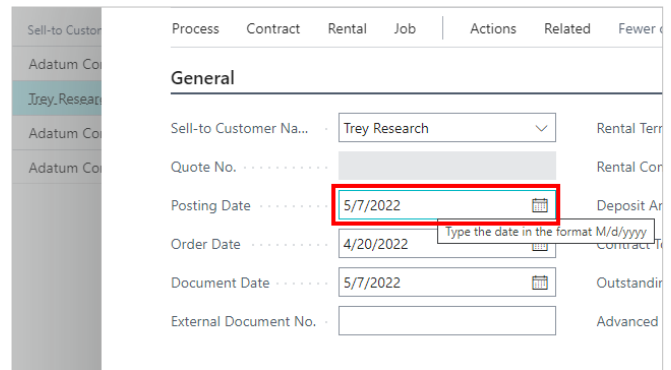
The following demonstrates adding 2 Rental Units which are assigned to a Rental Group to the Rental Lines of a Rental Contract.

SUGGESTION

If the Rental Start Date is to be at a different date than the current Rental Lines have, then suggest changing the Posting Date to the planned start date for the new units on the General Tab so that when the Rental Lines are created the Rental Start Date will be set to the planned date.

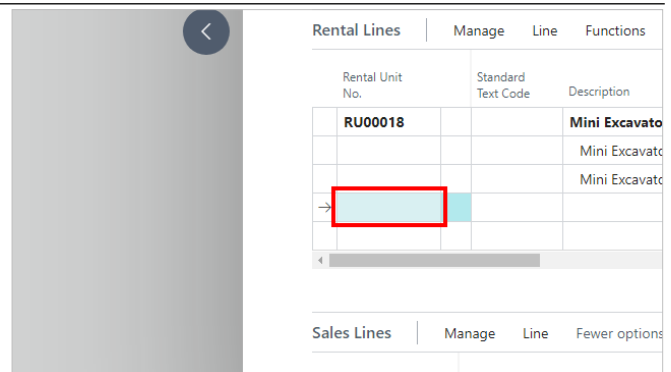
Click on the field **Posting Date**

As the Posting Date and Document Date are May 7. This is the date that the Rental Start Date will be set to on the new Rental Lines when the Rental Units are selected from the calendar.

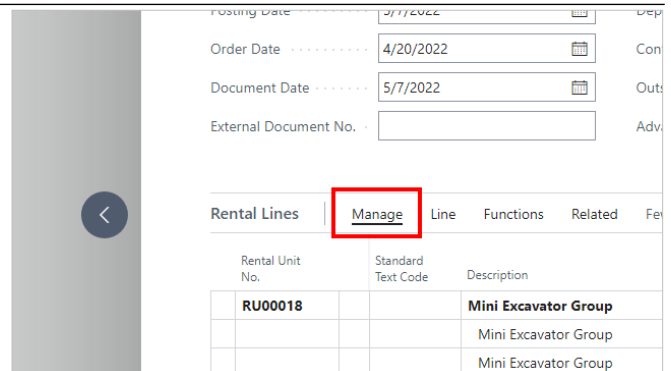


Click on the cell **Rental Unit No.**

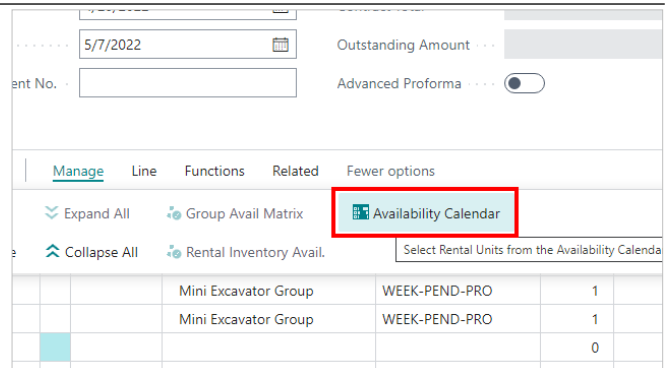
When adding Rental Units from the calendar, ensure that you are on a blank rental line.



Click on the navigation menu item popup **Manage**



Click on the navigation menu item **Availability Calendar**



Select the Rental Units to be added to the Rental Lines on the rental document.



ODT Rentals Online Help

Click on the cell **Rental Start Date** with the value **5/7/2022**

Note that the Rental Start Date is automatically set to May 7, the same as the Posting Date and Document Date.

Unit	Manage	Line	Functions	Related	Fewer options			
		Rental Terms Code Alt1	Rental Terms Code Alt2	Required Shipping Date	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
18				5/5/2022	5/7/2022		5/13/2022	300.00
				5/5/2022	5/7/2022		5/13/2022	300.00
				5/5/2022	5/7/2022		5/13/2022	300.00
09	:			5/7/2022	5/7/2022		6/6/2022	150.00
9-002				5/7/2022	5/7/2022		6/6/2022	150.00
9-003				5/7/2022	5/7/2022		6/6/2022	150.00

If the new Rental Units are to be shipped on the same date as the other Rental Units on the Rental Lines, then the Required Shipping Date should be modified.

NOTE

The Required Shipping Date is the date used in setting the Starting Date-Time in the Reservation Entries.

3.3. Rental Quotes

3.3.1. Rental Quote Overview

3.3.1.1. Overview

Users have the ability to quote both rentals and sales from a Rental Quote, as it contains both Rental Lines and Sales Lines. The quote can then be converted to a Rental Contract.

Rental Quotes can be created by specifying the Sell-to Customer or by specifying a Sell-to Contact on the quote document. Additionally a Rental Quote can be created from a Contact card.

Internal comments can be added to the Rental Quote, which flow through to the Rental Contract. The internal comments can be added to the Rental Contract, which will be maintained on the Completed Rental Contract.

Electronic Signatures can be captured on the Rental Quote.

To learn about Electronic Signatures, please see ODT Rental Online Help, Additional Rental Processes, Electronic Signatures.

Files can be attached to a Rental Quote, Rental Lines and Sales Lines by using the Expand the factbox pane and selecting the document to be attached. The attachment will flow through to the Rental Contract, when Make Contract is ran. Alternatively the files can be attached to a Rental Contract and will flow through to the Completed Rental Contract.

An additional feature provided is the ability to specify a quote as completed should a customer decline the quote. Thus enabling the declined quote to be moved to the Completed Rental Quotes. In conjunction with this feature, an option, Re-Open on the Completed Rentals Quotes is provided to re-open quote. This is especially useful should the customer who initially decline the quote, change their mind and decide they do wish to approve the quote.

For information on how the re-open a quote, see the help in Rental Quotes, How to Mark as Complete and Re-Open a Rental Quote.

Should an organization utilize Jobs in conjunction with ODT Rentals, a Job can be created directly from the Rental Quote and the Job can be viewed from the quote.

To learn about these, please see ODT Rental Online Help, Additional Rental Processes, Integration with Jobs.

Additional Notes for Rentals, which provides the ability to link Standard Text Codes with or without extended text to units and specify which rental documents they are to print on.

For information on Additional Notes, see ODT Rental Online Help, Additional Rental Processes, Additional

Notes for Rentals.

The Sales information already included in Dynamics 365 Business Central has not been included here. Please review the Dynamics 365 Business Central help, Sales documentation for details.

For information on the individual fields on the Rental Quote, point to the field name and a short description of the field will be provided.

The ODT Rentals has a feature, Rental Packages, for combining multiple rental unit groups, rental units, standard text codes (with and without extended text) and descriptive comments into a single package.

To learn about Rental Packages, go to ODT Rental Online Help, Additional Rental Processes, Rental Packages.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, in a United States company. Therefore, the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

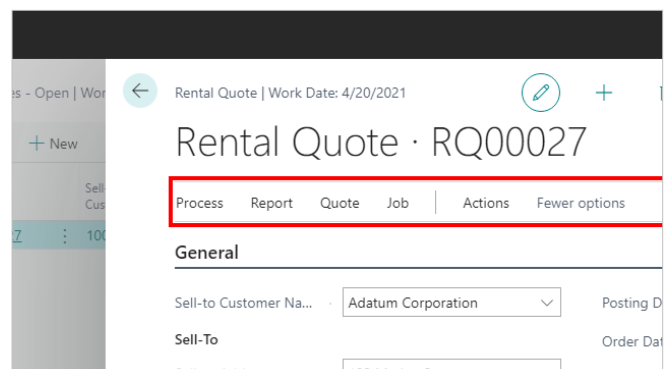
For information on the setup and processing of rentals using the Price Incl. VAT, see the ODT Rental Online Help, Rest of World Additional Rental Processes, Processing Rentals using Price Incl. VAT.

3.3.1.2. Command Bar Options

The command bar options above the General tab on the Rental Quote Card provide the options for:

- Adding or reviewing Dimensions on the quote
- Adding internal comments to the quote
- Copying an open or completed Rental Contract
- Creating and viewing a Job from the quote
- Converting the Rental Quote into a Rental Contract
- Marking the Rental Quote as completed
- Print, email or send the Rental Quote document

Command Bar



The following provides an overview of the purpose and use of the rental options on the various command bar options.

NOTE:

Once one of the command bar options is clicked on, then at the far right there is a Pin, which when clicked on will pin the sub-menu options. Then as each command bar option is clicked on, the respective sub-menu options will automatically be displayed.

The following provides a brief overview of the sub-menu options available in the Process option.



- **Make Contract:** This option is used to convert the Rental Quote to a Rental Contract once rental lines and if applicable, sales lines are completed and the customer has agreed to the quote. When this option is selected, the rental quote is flagged as completed. The new Rental Contract will automatically open upon confirming you want to convert the quote to a contract.

Mark as Completed: This option is used, in essence, to close the Rental Quote should the customer decide they do not wish to move forward with the rental. When selected the quote is flagged as completed.

•

- **Copy Document:** This option provides the ability to copy either an open or completed Rental Contract or Rental Quote. When selected, options fields are included for the user to specify the Rental Start Date and Rental Return Date and whether to Include the Header and Recalculate Lines.

If you are using the Business Manager Role Center, the Completed Rental Quotes can be accessed by selecting the Rental activity option.

If you are using the Sales Order Processor Role Center, the Completed Rental Quotes are available in the Posted Documents activity option.

The following sub-menu options are available in the Report option:

- Print
- Email
- Send

The following sub-menu options are available in the Job menu option and are for use with the Integration to Jobs feature.

- Create Job
- View Job

To learn about these sub-menu options, see ODT Rental Online Help, Additional Rental Processes, Integration with Jobs.

The following provides a brief overview of the sub-menu options available in the Quote option.

- **Dimensions:** Displays the dimension codes and valued which are defaulted from the Customer card and other fields that may have Dimensions configured on such as the Salesperson Code. The Dimension Code and Values can be modified, if permitted by setup, and additional ones can be added.

- **Customer:** Opens the Customer card.
- **Contact:** Opens the Contact card.
- **Comments:** Provides the ability to add comments to the quote.

The command bar Actions menu option contains the sub-menu options of Quote and Create.

The Quote option contains the sub-men options of Dimensions, Print, Email, Send, Copy Document, Create Job and View Job. The Create option contains the sub-menu options of Make Contract and Mark as Complete.

A factbox is available to expand and collapse as needed on the Rental Quote, which is located at the far right of the Command Bar.

To learn about attaching Comments, Links, Notes and Attachments to rental documents, see ODT Rental Online Help, Processing Rentals, Rental Quotes, How to Add Comments and Attachments to Quotes and How to Add Links and Notes to Quotes.

3.3.1.3. Rental General Tab and Rental Line Fields

General tab - Rental Specific fields:

No.

The document No. is linked to the No. Series through the Rental Quote Nos. field found in Rental Management Setup for the assignment of document Nos.

- This field is not displayed by default, and the number is automatically assigned and will be displayed at above the General fast tab.

Rental Terms Code

- If the Rental Term is entered on the Customer card, it will default to the rental header on selection of the Customer. If not specified on the Customer card, and is entered on the rental header, the rental term will automatically populate all Rental Lines as Rental Units are entered. This will occur only when on Rental Management Setup the field, Use Unit Rental Terms, is not checked.

General		Show less	
Sell-to Customer Na...	<input type="text"/>	Posting Date	4/12/2021
Sell-To		Order Date	4/12/2021
Sell-to Address	<input type="text"/>	Document Date	4/12/2021
Sell-to Address 2	<input type="text"/>	Rental Terms Code	<input type="text"/>
Sell-to City	<input type="text"/>	Salesperson Code	<input type="text"/>
Sell-to State	<input type="text"/>	Responsibility Center	<input type="text"/>
Sell-to ZIP Code	<input type="text"/>	Rental Calendar	<input type="text"/>
Show On Map		Customized Rental C...	No
Sell-to Contact No.	<input type="text"/>	Original Time Zone	Mountain Standard Time
Sell-to Contact	<input type="text"/>	Current Time Zone	Mountain Standard Time
Sell-to Customer Tem...	<input type="text"/>	Time Zone Difference	
Customer Rental Instr...	No	Job Template No.	<input type="text"/>
Override Insurance V...	<input type="checkbox"/>	Job No.	<input type="text"/>
External Document No.	<input type="text"/>		

When Show more is selected on the General tab, the following time zone fields and other rental fields are available for when an organization processes using multiple time zones.

The time zone fields cannot be modified by users. These fields show the time zone the entry originated from, the time zone the current user is located at and the time difference between originating and current users' time zone, if different.

The time zone fields on the Rental Quote, General tab include:

- Original Time Zone
- Current Time Zone
- Time Zone Difference

These fields will dynamically change, when the quote is opened in a different time zone.

NOTE: The time zone the user is located in can be viewed by opening My Settings.

Rental Calendar

- Specifies the base rental calendar for the contract.

Customized Rental Calendar

- When you have set up a customized version of the base rental calendar, then Yes will be displayed.



Other rental fields include:

Customer Rental Instructions

- If Rental Customer Instructions have been setup on the Customer selected, then Yes will be displayed. The instructions can be viewed by clicking on the Yes.

Override Insurance Verification

- If an organization is tracking customer Insurance Certificates with the setting of Error on Rental Management Setup and the certificate has expired, by enabling this field the quote can be converted to a Rental Contract.

Job Template No.

- This field is used in conjunction with the Integration to Jobs feature for specifying a Job Template No.

Job No.

- This field is used in conjunction with the Integration to Jobs feature for specifying a Job No. that the quote will be linked to.

Rental Line Fields

For a brief description of the individual fields on the Rental Lines you can click on the column caption.

The following provides an overview of the purpose and use of the individual fields displayed by default on the Rental Quote Lines, when a rental unit or package has been entered on a rental line.

Rental Unit No.

- The No. field provides a list of Rental Unit Groups and Rental Units to select from. When a Rental Unit Group is entered on a Rental Line, once you move off this line, then additional rental lines will be created based on the Rental Quantity entered. These child lines are for the selection of the individual units linked to the rental group.

Standard Text Code

- Used to enter a Standard Text Code on a Rental Line. This field cannot be populated on a line that already has a Rental Unit No. Nor can a Rental Unit No. be entered on the line after a Standard Text Code has been entered on the line.

Description

- Specifies the description of the rental unit. This can be overridden if desired.

Rental Terms Code

- The Rental Term Code may be automatically added to this field either from the Customer Card or the Rental Unit card, if defined on the respective cards. The term on the Rental Unit card will only default to the line if on Rental Management Setup the field, Use Unit Rental Terms, is checked. This setting takes priority over the Customer Card, Rental Term setup and the entry of a Rental Terms Code on the rental header. If the field is blank, or you wish to change the defaulted rental term, drill-down to select the appropriate code to complete the transaction. You can also change it to another value if a Rental Terms Code is present. This new code, however, will only be used on the current document.

Rental Quantity

- Specifies the number of rental units to be rented.

Location

- Specifies the rental location of the rental unit. The location is mandatory, when on Rental Management Setup, the Location Mandatory field has been checked. The location specified on the group line defaults to the child lines and will filter the list of units available to the location specified on the group rental line. For units not linked to a group or entry of a group unit only the location specified on the rental unit card will default to the rental line.

Rental Terms Code Alt1

- Specifies a rental term code that is used in the optimized pricing calculation when the return date of the rental is either greater than or less than the period code specified on the rental term. The Rental Term Alt1 Code defaults from the Rental Term Code entered here if setup on the term when the term is entered on the line.



Rental Terms Code Alt2

- Specifies a rental term code that will be used in the optimized pricing calculation when the return date of the rental is either greater than or less than the period code specified on the rental term. The Rental Term Alt1 Code defaults from the Rental Term Code entered here if setup on the term when the term is entered on the line.

Rental Start Date

- Specifies the date on which the rental will commence. This date is included in the pricing calculation. By default, this date matches Order Date on the General fast tab. You can change this date to when the rental is to begin, if the rental is to start at a different date.

No. of Periods

- Provides the ability to enter the number of periods the rental is for, which updates the rental return date using the selected rental term multiplied by the no. of periods.

Rental Return Date

- The Rental Terms Code specified will automatically populate the Rental Return Date based on the Rental Start Date and the assigned rental period length for the default Rental Terms Code on the line. This date can be modified to specify the expected return date of the rental. In the event of an unknown return date, then the Rental Return Date field can be cleared and entered when the unit is returned or an expected return date is known.

Rental Unit Price

Specifies the rental price for the rental unit for a single rental period. This price defaults from the Rental Price setup for the Rental Term setup on the Rental Unit or unit group. The price can be overridden directly on the line, if needed.

- Should the Rental Term entered on the line not be setup in Rental Prices on the Rental Unit or group, then the price can be entered directly on the rental line.

Alt1 Rental Unit Price

- Specifies the rental price for the rental unit for a single rental period for the Rental Terms Code Alt1, when defaulted to or entered on the Rental Line.

Alt2 Rental Unit Price

- Specifies the rental price for the rental unit for a single rental period for the Rental Terms Code Alt2, when defaulted to or entered on the Rental Line.

Currency Code

- Specifies the Currency Code, which defaults from the Invoice Details tab, Currency Code. The Currency Code on the Invoice Details tab defaults from the Customer card.

Tax Group Code

- Defaults the Tax Group Code from the rental price card setup for the rental term on the rental unit group, rental unit or the rental package, if setup. When rental price cards are not setup on the rental unit group or rental unit, then the Tax Group Code will default from the rental unit card.

Qty. to Rent

- Specifies the number of rental units to be rented. The number defaults from the Rental Quantity field on the line.

Line Discount %

- Specifies the line discount percentage that is valid for the rental unit quantity on the line. If left blank, no reduction will occur. Should Damage Waivers be included on the Rental Price with the Damage Waiver Allow Line Disc checked, then the Line Discount % will also be applied to the Damage Waiver Unit Price. Should Metered Usage be included on the Rental Price card with the Metered Usage Allow Line Disc checked, then the Line Discount % will also be applied to the Metered Usage Unit Prices.

Return Day Billable

- Specifies whether the day the rental unit is returned will be billable to the customer. This field is automatically populated based on the setting on Rental Management Setup for this field, however, can be

modified if needed.

Commit Reservation

- Specifies whether to create a reservation for the rental unit or a group and if selected, the child units. This field will be displayed once an entry is made on the rental lines.

Global Dimension 1 and 2

- Global Dimension 1 and 2 fields are displayed by default, and can be edited on the rental lines.

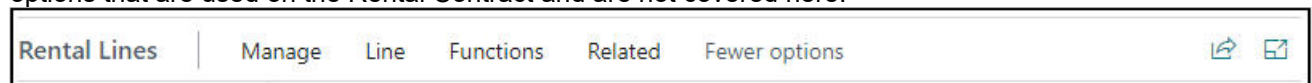
NOTE:

Prior to entering a unit, group or rental package on the rental lines, the fields, Qty. on Rent, Qty. to Return and Qty. Returned are displayed on the quote rental lines. Once an entry is recorded, then these fields will no longer be displayed, as they are not applicable to the entry and processing of rental quotes. Information on these fields is provided in the Rental Contract Overview.

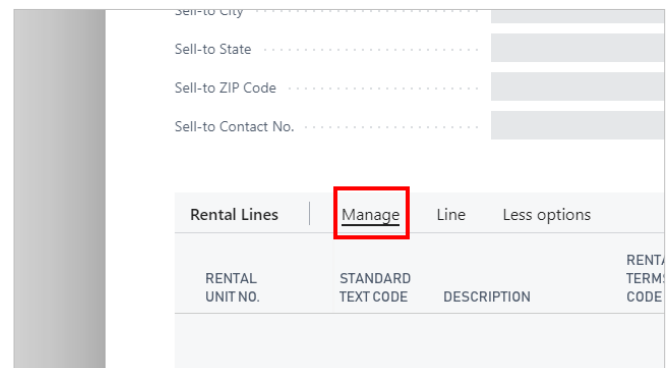
3.3.1.4. Rental Line Command Bar

The Rental Lines have command bar options that relate strictly to the rental lines.

The Functions menu option is displayed only prior to entering a rental unit on the rental lines and contains options that are used on the Rental Contract and are not covered here.

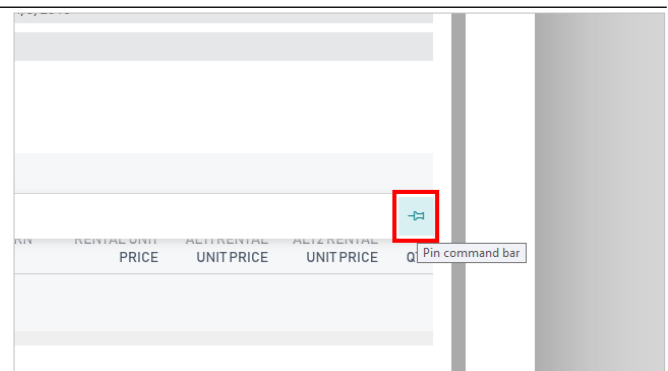


Click on the navigation menu item popup **Manage**



Click on the button **Pin**

By clicking on the Pin the sub-menu options will be automatically displayed for each command bar option as it is clicked on.



The following provides an overview of the purpose and use of the options available in the Manage command bar option.

New Line

- Creates a new line.

Delete Line

- Deletes the selected line. When using Rental Unit groups, the child unit lines cannot be deleted individually. The group line must be deleted, which will automatically delete the child unit lines. When using Rental Packages, lines can be deleted, except when the package has the Package Locked field enabled.

Expand All

- This option is for use with Rental Packages. When the package is expanded, this option is not available to select. When the package has been collapsed, then selecting Expand All will expand the package to show all the component rental lines.



Collapse All

- This option is for use with Rental Packages, when entered on the rental lines. Selecting this option will collapse the package lines so that only the package line is displayed. The component lines will be hidden.

Group Avail Matrix

- The Group Availability Matrix provides a quick view of the availability of a group and the rental units linked to a group. Thus facilitating the selection of the rental units on the rental quote or rental contract lines.

Rental Inventory Avail.

- The Rental Inventory Availability list provides a quick view of the quantity of the rental item that is available to rent, when an item is linked to the rental unit on the quote or contract rental lines.

The following provides an overview of the purpose and use of the options available in the Line command bar option.

Rental Amount Lines

- The Rental Amount Lines option provides the ability to view the rental amount line records that will be billed for the selected rental line, when the invoice is posted. It is recommended that the Rental Amount lines be reviewed, to verify that the amounts that would be billable to a customer are correct, before providing the quote to the customer for approval.

Metered Usage Entries

When the rental unit card for the unit selected has Metered Usage Required enabled, then this option is available. When selected a listing of the usage tracking entries will be displayed.

- To learn about Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

View Rental Calendar

The Rental Custom Calendar provides the ability to specify days as non-billable or as days on which a standby price is to be billed.

- To learn about the Rental Custom Calendar feature, see the ODT Rental Online help, Additional Rental Processes, Rental Custom Calendar.

Item Tracking Lines

When the rental unit card for the unit selected is linked to a serialized item, then this option is available to pick the serial nos. for the rental quantity on the line.

- To learn about processing rentals when the Rental Unit is linked to an Item with Serial No. and/or Lot No. tracking, see the ODT Rental Online Help, Rental Contracts with Rental Units Linked to Items.

Additional Notes

When the Additional Notes is selected after selecting a record in the Rental Lines, then if any Additional Units have been setup on the unit, they will be displayed. Alternatively, users can add Additional Notes to a unit line consisting of Standard Text Codes and/or description line comments, which will print on the specified documents.

- To learn about Additional Notes, see the ODT Rental Online help, Additional Rental Processes, Additional Notes for Rentals.

Dimensions

- Display the Dimension Codes and Values setup on the unit for the selected line. Dimension Codes and Values can be modified or added.

Rental Prices

- The Rental Prices option, when selected, will display all the Rental Price cards for the Rental Unit, group or Rental Package line selected.

The Related menu option contains a sub-menu option of Line Invoices, which will display a listing of invoices

related to the selected rental line.

Attachments

Display the attachments setup on a Rental Unit, which flow through to the Rental Lines, when the unit is selected on the line. Attachments can be deleted or added to the line and will flow through to the Rental Contract lines.

To learn about adding Attachments to Rental Units, see ODT Rental Online Help, Setup Rentals, Setup Rental Units, How to Attach Documents Links and Notes.

- To learn about adding Attachments to Rental Lines, see ODT Rental Online Help, Processing Rentals, Links, Notes and Attachments.

3.3.1.5. Additional Fields Available to Add to Rental Lines

There are additional fields available to add to the rental line using the setting called Personalize.

Should your organization track rentals based on date and time where billing is based on a starting time and return time in addition to date, then the fields Rental Start Time and Rental End Time will need to be added to the rental lines.

The following provides an overview of the purpose and use of the individual fields that can be added to the Rental Quote Lines.

Line No.

- Displays the line number of the rental line.

Tax Area Code

- Displays the Tax Area Code, which defaults from the Invoicing Details tab and can be modified.

Tax Prod Posting Group

- Specifies the VAT product posting group. This field is not mandatory. When using tax product posting groups, this field links business transactions made for the Rental Unit with the general ledger, to account for VAT amounts resulting from trade with that record.

Shipping Agent Code

- Specifies the shipping agent which is to be used to transport the rental units to the customer. When a customer card has the Shipping Agent Code setup, it will default to the rental document, Shipping tab. Then when the rental lines or sales lines are entered, the code will default to the lines. The code in the field on the line can be overwritten.

Shipping Agent Service Code

- Specifies the service option of the shipping agent which is to be used to transport the rental units to the customer. When a customer card has the Shipping Agent Service Code setup, it will default to the rental document, Shipping tab. Then when the rental lines or sales lines are entered, the code will default to the lines. The code in the field on the line can be overwritten.

Rental Start Date-Time

- Displays the combination of the Rental Start Date and Rental Start Time fields.

Rental End Date-Time

- Displays the combination of the Rental End Date and Rental End Time fields.

Rental Billing Start Date-Time

- Displays the combination of the Rental Billing Start Date and Rental Billing Start Time fields.

Rental Billing End Date-Time

- Displays the combination of the Rental Billing End Date and Rental Billing End Time fields.

Rental Return Date-Time

- Displays the combination of the Rental Return Date and the Rental Return Time fields.

Shortage

- Displays whether there is a shortage of rental product

Sub Rental

- When the unit entered on the Rental Line has the Sub Rental field set to Yes, then this field will be automatically checked to display the unit is a Sub Rental unit.

Sub Rental Purch. Order No.

- This field is for use only on Rental Contracts. On the contract, this field will display the Purchase Order No of the sub contracted product when the Create Sub Rental Purchase Order is ran either from the contract or from the Sub Rental Worksheet.

Cust. Declines Damage Waiver

- When the rental price card has Damage Waiver pricing enabled, and this field is checked on the rental line, then the Damage Waiver fee will not be billed to the customer.

Rental Start Time

- Specifies the time at which the rental will commence. The time is defaulted to the time field when the rental line is created. The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time. When the field has Track Date Only, then the time will default to 12:00:00 AM and the field cannot be edited. When the field has Track Date and Time, then the time will default to the time at which the rental line is created and be edited.

Rental Return Time

- Specifies the time at which the rental unit is expected to be returned. The Rental Terms Code specified will automatically populate the Rental Return Time based on the Rental Start Date, Rental Start Time and the assigned rental period for the default Rental Terms Code on the line. The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time. When the field has Track Date Only the time will default to 11:59:59 PM and the field cannot be edited. When the field has Track Date and Time, then the time will default the time based on the lapsed time less one second from the Rental Start Time. The length of time is based on the Rental Period Code setup on the Rental Term. The field can be edited.

Rental Billing Start Date

- Specifies the date on which the rental billing will commence. As the billing usually commences at the time of the rental this date is defaulted to the same date as the Rental Start Date. This date can be overridden should the billing to commence at a different date than the rental.

Rental Billing End Date

- Specifies the date on which the rental billing will finish. This date can be overridden should the billing to end at a different date than the rental return date.

Rental Billing Start Time

- Specifies the time at which the rental billing will commence. The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time. When the field has Track Date Only, the time will default to 12:00 AM and the field cannot be edited. When the field has Track Date and Time, the time will default to the time at which the rental line is created and be edited.

Rental Billing End Time

- Specifies the time at which the rental billing will finish. The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time. When the field has Track cannot be edited. When the field has Track Date and Time, then the time will default the time based on the lapsed time less one second from the Rental Billing Start Time. The length of time is based on the Rental Period Code specified on the Rental Term Card. The time can be overridden, if desired.

Customer Pickup

- Specifies whether the customer will pick-up the unit. This feature is used in the Global Pending Shipments functionality. The population of this field is not mandatory on a quote. However, if the company is using the Global Pending Shipments functionality, it is recommended that if the customer is to pick up the unit, that this field be checked on the rental Line.



Required Shipping Date

- Specifies the date the customer requires the unit be shipped. This field is used in the Global Pending Shipments functionality. The population of this field is not mandatory on a quote. However, if the company is using the Global Pending Shipments functionality for "picking" the units, then this will be required on the Rental Contract once the quote is converted to a contract.

ODT Transfer Order No.

- Displays the Transfer Order No. that was created and posted when a rental line with a unit linked to an Item has the Commit Reservation checked.

Vendor No.

- This field is for use only on Rental Contracts. On the contract, this field must be populated for Sub Rental Units prior to running the Create Sub Rental Purchase Order from the contract.

Vendor Name

- Displays the name of the Vendor when the Vendor No. field is populated.

Sub Rental Description

- This field is for use only on the Rental Contracts. On the contract, this field must be populated for Sub Rental Units prior to running the Create Sub Rental Purchase Order from the contract.

Package Line Amount Excl. Tax

- This field is for when Rental Packages are used. On the rental line on which a Rental Package has been selected, this field displays the price setup on the package for the rental term selected on the line. For the rental lines having the components of the rental packages, this field displays the calculated rental unit price for rental unit groups and units in the package. This is the unit price that will be allocated to the units in the package based on the package price.

Pkg. Line No Print

Displays the setting from the Rental Package Lines. When checked the line will not print on any rental documents. When not checked, then the rental line will print on documents if the Show Rental Details is selected on the printing request pages.

- To learn about Rental Packages, see ODT Rental Online Help, Processing Rentals, Additional Rental Processes, Rental Packages.

Shipment Date

- Specifies the Shipment Date. This date defaults from the Shipping tab and can be overridden to specify the date the shipment occurred on or is to occur on.

Shipment Time

- Specifies the Shipment Time. The purpose of this field is to enable companies that are tracking rentals on both date and time, to enter the actual time of shipment, either on the rental line or in the To Ship cue list. The time that defaults to this field is dependent upon the Tracking Date Time field setting, on the Rental Term that is selected on the Rental Line. When the setting is Tracking Date Only, then the time will be set to 12:00:00 AM and cannot be edited. When the setting is Tracking Date and Time, then the time will be set to the current system time and can be overridden to enter the actual shipment time.

Shipment Date-Time

- Specifies the Shipment Date and Time and is the combination of Shipment Date and Shipment Time. This field is informational only, and cannot be edited. The field is automatically updated when either the Shipment Date or Shipment Time is modified.

Metered Usage Enabled

- Displays whether the unit on the rental line requires metered usage entry. This setting defaults from the rental unit card field, Metered Usage Enabled and cannot be modified.

Usage Unit of Measure

- Displays the unit of measure which will be used for tracking the metered usage on the unit. The UOM defaults from the rental unit price card and cannot be modified.

Metered Usage Tax Group Code

- Defaults the Metered Usage Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit and can be modified.



Metered Usage Base Price

- Displays the base price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified.

Metered Usage Level 1 End Qty.

- Displays the end quantity for the metered usage base unit price that is specified on the Rental Unit price card, for the Rental Term on the line. This field cannot be modified.

Metered Usage Level 2 Unit Price

- Displays the Level 2 unit price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified when the Metered Usage Levels field on the price card is set to 2 Levels.

Metered Usage Level 2 End Qty.

- Displays the end quantity for the metered usage level 2 unit price that is specified on the Rental Unit price card, for the Rental Term on the line. This field cannot be modified.

Metered Usage Level 3 Unit Price

- Displays the Level 2 unit price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified when the Metered Usage Levels field on the price card is set to 3 Levels.

Metered Usage Tax Group Code

- Displays the Metered Usage Tax Group Code that is specified on the Rental Unit price card, for the Rental Term on the line. The Tax Group Code can be modified on the rental.

Metered Usage Qty.

- Displays the total metered usage quantity. The amount will be a calculated amount when a Current Meter Reading is entered, which is different than the Previous Meter Reading, or is entered on the contract rental line. This field cannot be edited on a rental quote.

Billable Metered Usage Qty.

Displays the total billable metered usage qty., which defaults from the Metered Usage Qty. field and can be overridden on the Rental Contract line. The quantity in this field is only populated when the entry type is metered usage and is used for billing the customer. This field is not used on rental quotes.

- To learn about Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

Allow Zero Usage

- This field is used to specify that an invoice can be posted when the latest meter reading or metered usage qty. or periodic usage has not been entered.

Periodic Usage Enabled

- Displays whether the unit on the rental line requires periodic usage entry. This setting defaults from the rental unit or unit group field, Periodic Usage Enabled.

Periodic Usage Billing

- Displays as checked when Periodic Usage Billing is enabled on a Rental Price card for the rental unit and the rental term on the line. The field can be checked if the rental term on the line does not have a price card, when the Periodic Usage Enabled field is checked.

Periodic Usage Period Usage UOM

- Displays the Unit of Measure of DAY and cannot be edited as periodic usage and standby pricing is based on a daily price.

Periodic Usage Unit Price

- Displays the Periodic Usage Unit Price from the price card, when configured for the rental term on the line

and the Periodic Usage Enabled field is enabled. If there is no rental price card for the rental term on the line, then the Periodic Usage Price can be entered directly on the rental line, as long as Periodic Usage Enabled field on the rental unit and rental line is checked.

Periodic Usage Tax Group

- Defaults the Periodic Usage Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit, if setup. When rental price cards are not setup, then the Periodic Usage Tax Group Code can be selected when using line pricing.

Standby Billing

- Displays as checked when Standby Usage Billing is enabled on a Rental Price card for the rental unit and the rental term on the line. The field can be checked if the rental term on the line does not have a price card, when the Periodic Usage Enabled field is checked.

Standby Unit Price

- Displays the Standby Unit Price from the price card, when configured for the rental term on the line. If there is no rental price card for the rental term, then the Standby Unit Price can be entered directly on the rental line, as long as the Periodic Usage Enabled field on the rental unit and rental line is checked.

Standby Tax Group Code

Defaults the Standby Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit, if setup. When rental price cards are not setup, then the Standby Tax Group Code can be selected when using line pricing.

- For information on Periodic Usage and Standby Charges, see the ODT Rental Online help, Additional Rental Processes, Periodic Usage and Standby Charges.

Bin Code

- When the rental unit on the line is linked to an Item that is stored in bins, then the default Bin Code will populate this field and can be modified.

Return Bin Code

- This field is for use only on the Rental Contract to specify a Bin Code the item linked to the Rental Unit is to be returned to, when the bin is a different bin, than it was shipped from.

Return Location Code

- This field is for use only on the Rental Contract to specify a rental location the Rental Unit is to be returned to, when the Location is a different rental Location, than it was shipped from.

Return Temporary Location

- This field is for use only on the Rental Contract to specify a rental location the Rental Unit is to be returned to, when the Location is a different rental Location, than it was shipped from.

Job No., Job Task No. and Job Planning Line No.

- For information on the use of these fields, see ODT Rental Online help, Additional Rental Processes, Integration with Jobs.

Use Roll-up Pricing

- Specifies whether a Rental Package entered on the line is using Roll-up Pricing or Price Allocation. To learn about Roll-up Pricing Rental Packages, see ODT Rental Online help, Additional Rental Processes, Rental Packages.

Transferred From Doc. No., Transferred Date, Transferred and Transferred to Doc. No.

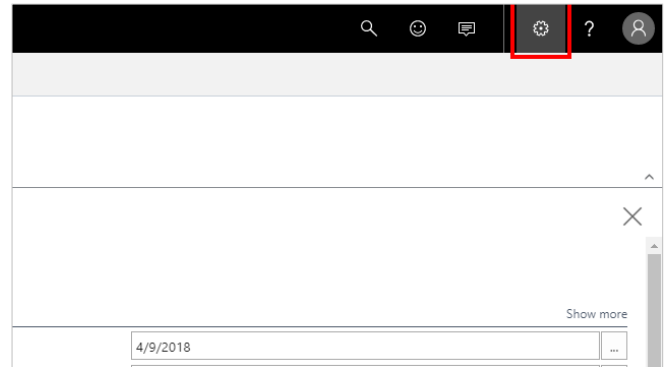
These fields are for use only on the Rental Contract.

- For information on the use of these fields, see ODT Rental Online help, Additional Rental Processes, Transfer Rental Contracts.

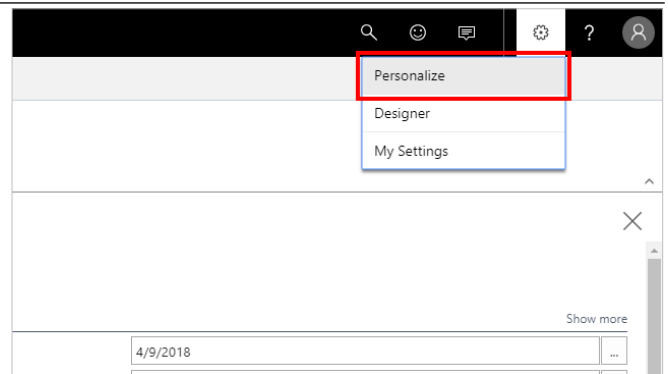
3.3.1.6. How to Add Fields to the Rental Lines

The following steps from an open Rental Quote demonstrate how to add fields to Rental Lines.

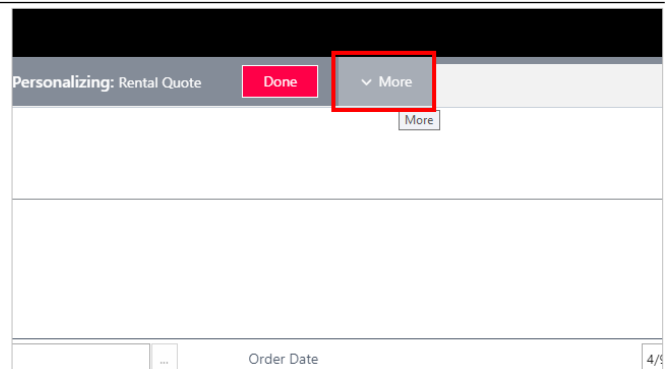
Click on the navigation menu item popup **Settings**



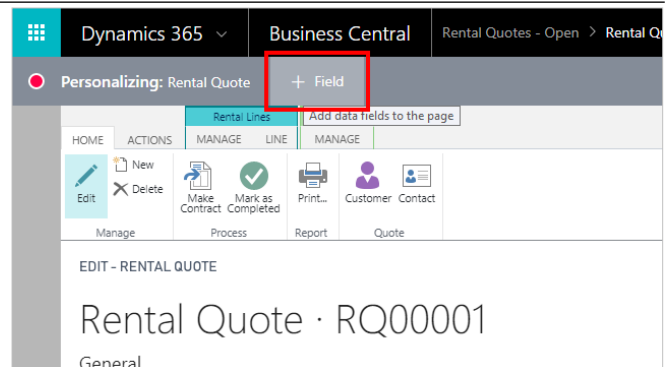
Click on the button **Personalize**



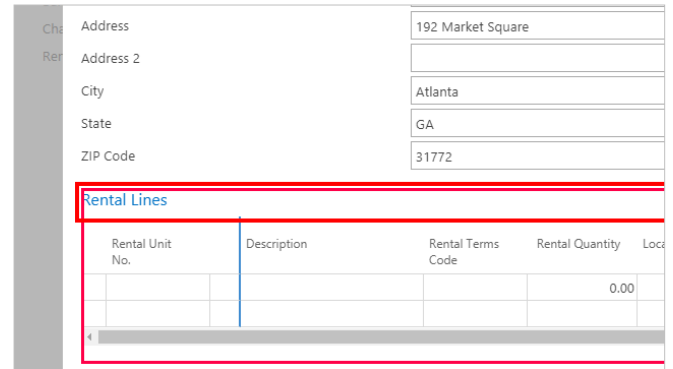
Click on the link **More**



Click on the link **Field**

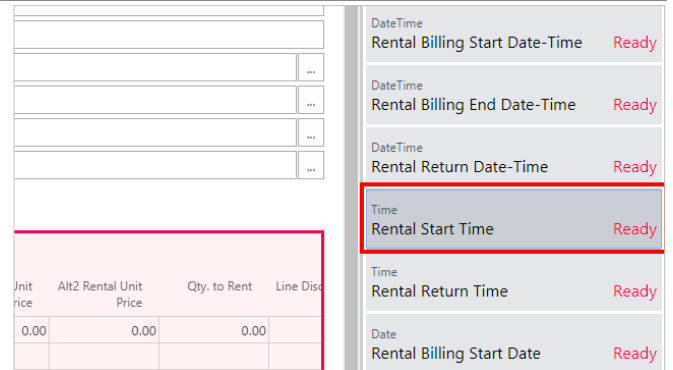


Click on the label **Rental Lines**



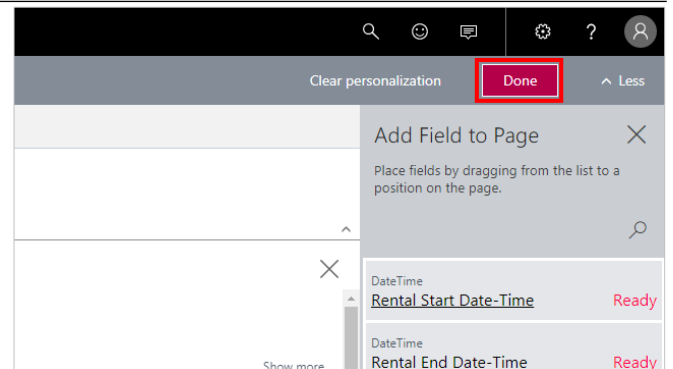
Left Click on the field to add to the Rentals Lines and drag it to the location on the Rental Line where you want the field to be displayed.

A thick red line shows up on the rental lines when dragging the field over, which indicates where the field is to be dropped.



When all desired fields have been added click on the Done button at the top as indicated in the screen shot provided.

Click on the link **Done**



3.3.1.7. Rental Amount Line Fields

The Rental Amount Lines basically display a breakdown on a rental period basis of what is to be billed to a customer. The following explains each of the fields on the Rental Amount Lines page.



Rental Amount Line Fields	
Type	Displays the type of rental charge to be billed to the customer. Types include: <ul style="list-style-type: none">- Rental for the rental charge- Damage Waiver for damage waiver charges- Metered Usage for usage charges- Periodic Usage for periodic usage charges- Standby Charges for standby usage charges
Starting Date-Time	Displays the Date and Time at which the billing starts for each the record. Each record is for a full rental period or, if applicable, a partial
Ending Date-Time	Displays the Date and Time at which the billing ends for the record.
Extended Quantity	Displays the quantity to billed and is used in the calculation of the amount fields in the Rental Amount Lines. When proration is used in the pricing, then for partial periods this field will be a multi-decimal quantity. When a unit has the Allow Overbooking field checked, and the unit is linked to an inventory item, then the quantity will reflect the quantity entered on the Rental Line.
Unit Price Excl. Tax	Displays the unit price that is to be used in the calculation of the amount fields. If there is no line discount on the Rental Line, then this price will equal the Rental Unit Price. If there is a line discount % entered on the Rental Line, then this price
Line Amount Excl. Tax	Displays the calculated amount based on Extended Quantity times Unit Price Excl. Tax.
Currency Code	Specifies the Currency Code, which defaults from the Invoice Details tab, Currency Code. The Currency Code on the Invoice Details tab defaults from the Customer card.
Amount Including Tax	Displays the Line Amount plus taxes assessed based on the Tax Group
Tax Group Code	The Tax Group Code defaults from the Rental Unit Price card. Should Rental Unit Price cards not be used and rental terms and prices are directly entered on the Rental Line, then the Tax Group Code field will default from the Rental Unit card.
Billing Date	Displays the earliest date on which the invoicing can occur for the line.
Billed	When this field is checked, it means the line has been invoiced.
Invoice No.	Displays the Invoice No. after the record has been invoiced.

3.3.1.8.

Invoice Details Tab

ODT Rentals provides the ability to specify rental line discount percentages, either on the Customer card, which will default to the quote or contract, or by entering the percentages directly on the quote or contract, Invoicing Details tab. When the discount % is entered in any of the discount fields on the Invoice Details tab, a confirmation message advising that the Line Discount field for the applicable units, groups or Rental Packages will be updated.

Invoice Details Show more	
Currency Code	Default Rental Disc. %
Bill-to Customer No. 10000	Rental Package Disc. %
Name Adatum Corporation	FA Rental Unit Disc. %
Tax Liabile <input checked="" type="checkbox"/>	Item Rental Unit Disc. %
Tax Area Code ATLANTA, GA	Resource Rental Unit Disc. %
Location Code	G/L Acct Rental Unit Disc. %
Rental Line Disc. %	

The following fields will default from the Customer card, if setup on the card, or can be entered directly on the Rental Quote.

Default Rental Disc %

This field is used for specifying a line discount %, which will be populate the Line Discount % field, when a unit



or group cards does not have the Link Type configured, or the following line discount fields are not populated.

When any of the following Disc. % fields are populated, either by defaulting from the Customer card or entered on the Invoice Details tab, then any unit or group with the applicable Link Type will have the Line Discount % field populated with the percentage in those fields..

- **NOTE:** When a unit or group with the Link Type specified is a component of a Rental Package, then the Line Discount % will be populated from the Rental Default Disc. %. However, when the Pkg. Disc.%, is populated on the Invoice Details tab, then the Package Disc % will be applied to the Rental Package line and the component units and groups.

Rental Package Disc %

- When specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field. This discount will be applied to the Rental Package Line and all component lines of the package. This occurs, even when the units are linked to Fixed Asset, Item, Resources or G/L Accounts and the following Disc. % fields are populated.

FA Rental Unit Disc %

- The FA (Fixed Asset) Rental Disc. %, when specified, will default to the units and groups which have the Link Type of Fixed Asset setup on the unit cards. This applies only to those Rental Lines which are not a component line of a Rental Package. The FA Rental Unit Disc. % overwrites the Line Discount %, when populated from the Default Rental Disc % field.

Item Rental Unit Disc %

- The Item Rental Unit Disc. %, when specified, will default to the unit rental lines, for the units which have the Link Type of Item setup on the unit cards. The Item Rental Unit Disc. % overwrites the Line Discount %, when populated from the Default Rental Disc % field.

Resource Rental Unit Disc %

- The Resource Rental Unit Disc. %, when specified, will overwrite the Line Discount %, when populated from the Default Rental Disc % field.

G/L Acct. Rental Unit Disc %

- The G/L Acct. Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

In addition to the discount fields that can default from the Customer card, a field called Rental Line Disc. %, is available on the Invoice Details tab.

When this field is populated a confirmation message occurs, and if yes is selected, then the Line Discount % field on the rental lines will be populated for all rental lines on the document. This will occur even if the other percentage fields on the Invoice Details tab, have a percentage entered.

To learn about setting up Rental Line Discount percentages on a Customer card, see ODT Rental Online Help, Setup Rentals, Financials setup for Rentals, How to Update Customer Cards for Rentals.

To learn about processing rentals using the various discount fields, see ODT Rental Online Help, Additional Rental Processes, Rental Line Discounts.

When Show more is selected, then the following fields related to the Billing Cycles feature are displayed.

- Billing Cycle Type
- Default Invoicing Period Code
- Billing Cycle Day
- Billing Tolerance Days
- Billing Cycle Date

To learn about the Billing Cycle feature and the fields, see ODT Rental Online Help, Processing Rentals, Rental Contracts Using Billing Cycles.



3.3.1.9. Document Signatures Tab

Electronic Signatures can be captured on the Rental Quote.

To learn about Electronic Signatures, please see ODT Rental Online Help, Additional Rental Processes, Electronic Signatures.

3.3.2. How to Create a Rental Quote and Make Contract

3.3.2.1. Creating a new Rental Quote

Profile - Sales Order Processor

Rental Quotes can as well be created from the Business Manager Profile using the steps provided here.

Click on the navigation menu item **Rental Quote**

Posted Documents Setup & Extensions

Documents Transfer Orders Rental Quotes Rental Contracts Rental Periods Rental Terms

ACTIONS

+ Sales Quote	+ Sales Return Order	+ Rental Contract
+ Sales Invoice	+ Sales Credit Memo	+ Rental Units
+ Sales Order	+ Rental Quote	> Tasks

Create a new rental quote to offer customers re

Click on the field **Sell-to Customer Name**

Quote

Quote Actions Less options

Sell-to Customer Name

Ext

Pos

Org

Double click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Click on the Customer that the Rental Quote is being created for.

Process Report Quote Actions Less options

General

Il-to Customer Name

LL-T0

Il-to Address

Il-to Address 2

Il-to City

Il-to State

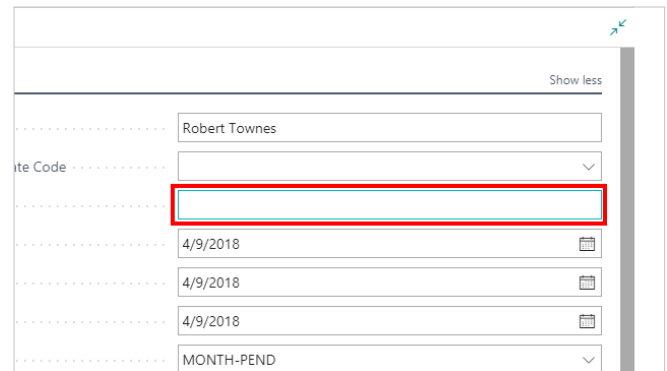
Il-to ZIP Code

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Trey Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

+ New

Click on the field **External Document No.**

Should the Customer have provided a document number which needs to be entered on the Rental Quote, then enter this number in the External Document No. field.

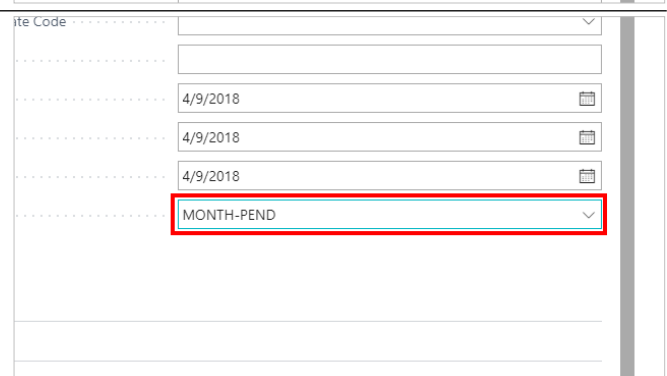


The screenshot shows a form with several fields. The 'External Document No.' field is highlighted with a red box. Other fields include 'Customer Name' (Robert Townes), 'Quote Code' (dropdown), 'Start Date' (4/9/2018), 'End Date' (4/9/2018), and 'Rental Terms Code' (MONTH-PEND).

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

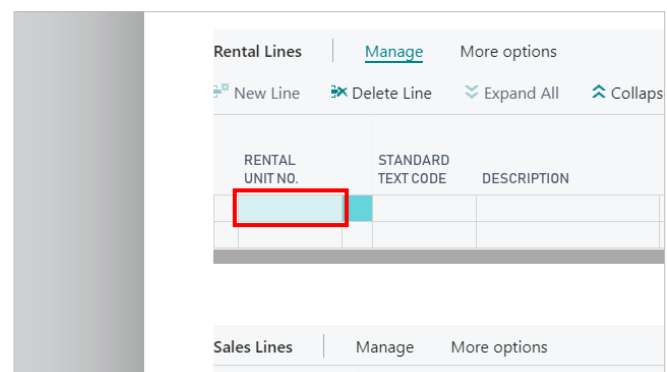


The screenshot shows the same form as above, but the 'Rental Terms Code' field is highlighted with a red box. The value 'MONTH-PEND' is visible in the dropdown.

3.3.2.2.

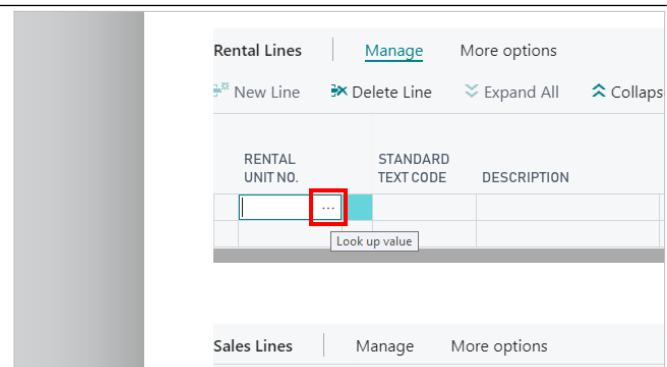
Rental Line Entry for a Rental Unit Group

Click on the cell **Rental Unit No.**



The screenshot shows the 'Rental Lines' table with columns: RENTAL UNIT NO., STANDARD TEXT CODE, and DESCRIPTION. The first row has a red box around the 'RENTAL UNIT NO.' cell. Above the table are buttons: New Line, Delete Line, Expand All, and Collaps. Below the table are buttons: Sales Lines, Manage, and More options.

Click on the lookup button in the cell **Rental Unit No.**



The screenshot shows the same 'Rental Lines' table as above, but the 'RENTAL UNIT NO.' cell now has a small '...' button (lookup button) next to it, which is highlighted with a red box. Below the table is a 'Look up value' button.



Click on the link in cell **No.** with the value **RU00001**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailers	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on **No. = RU00001, Description = Buckeye Ditcher Group**

Click on the Rental Unit Group to be added to the Rental Line.

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
BD-006		Buckeye Ditcher
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher
RU00004		Buckeye Ditcher
RU00005		Buckeye Ditcher
+ New		

Click on the cell **Rental Terms Code**

Normally the Rental Term on all rentals will be the same on the quote. Should the Rental Unit selected default in a term that needs to be changed, then select the applicable term.

The following demonstrates selecting a different Rental Terms Code.

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Click on **Code = MONTH-START, Description = Monthly Rental for Billing at Start of Contract**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
	Buckeye Ditcher Group	MONTH-PI	0		
		<div>CODEDESCRIPTION</div> <div>MONTH-PSTARTMonthly Rental - Per</div> <div>MONTH-PSTART-EAMonthly Rental - Ear</div> <div>MONTH-STARTMonthly Rental for B</div> <div>WEEK-END-OPTWeekly Rental for O</div> <div>WEEK-END-OPT-TIMEWeekly Rental for O</div> <div>+ New</div>			
image					
0.	DESCRIPTION				



Click on the cell **Rental Quantity**

More options					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	ITH-START	0		
UNIT OF					

Enter the text **2**.

When moving off the Rental Quantity field, then the child rental lines are created equal to the rental quantity entered on the group line.

More options					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	MONTH-START	2		
UNIT OF					

The Rental Unit No. Field will be blank. These rental lines are considered child lines of the rental unit group.

If the specific units are not selected on the quote, then when the quote is converted to a Rental Contract, the units must be selected at that time so that the contract can be processed.

The Rental Unit No. field does not require the selection of a specific unit in the group on a quote, as the units to be rented may not be known at the time of providing the quote or may be for a future date.

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-START					4/
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-START	2			4/9/2018
CODE NAME					
EAST East Warehouse					
RE Select record "EAST"					
WEST West Warehouse					
U + New					
LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	



ODT Rentals Online Help

Click on the cell **Rental Return Date**

Review and either accept the defaulted Rental Return Date or enter the expected date of return.

To change the Rental Return Date complete the following steps.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
		4/9/2018	5/8/2018	500.00	0.00	0.00	

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
		4/9/2018	5/8/2018	500.00	0.00	0.00	

Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
4/9/2018	5/8/2018	500.00	0.00	0.00	

Click on a date in the calendar

For this example, click on June 8.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018	5/8/2018	500.00	0.00	0.00	

Click on the cell **Rental Unit Price**

The Rental Price defaults from the Rental Price card for the Rental Term selected on the line.

This price can be overridden, if desired.

Optionally, a Line Discount % could be specified.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
1	4/9/2018	6/8/2018	500.00	0.00	0.00
LINE AMOUNT					

Click on **Commit Reservation**

Should you wish to reserve the rental quantity for the group, then check the Commit Reservation field on the rental group line.

The child lines of the group will automatically be checked.

RENTAL PRICE	QTY. TO RENT	LINE DISCOUNT %	RE... DAY BIL...	CO... RE...	ODT TRANSF... ORDER NO.	PARTIAL RETURN DATE
0.00	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
0.00	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
0.00	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
0.00	0	0	<input type="checkbox"/>	<input type="checkbox"/>		

To review the rental group availability from the Group Availability Matrix, complete the following steps.

Click on the navigation menu item popup **Manage**

Sell-to City	Atlanta
Sell-to State	GA
Sell-to ZIP Code	31772
Sell-to Contact No.	CT000001

Rental Lines	Manage	More options
--------------	--------	--------------

RENTAL UNIT NO.	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2
RU00001	EAST		
	EAST		

Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the help document - Processing Rentals Overview - Group Availability Matrix Overview.

Sell-to ZIP Code

31772

Sell-to Contact No.

CT000001

Rental Lines

[Manage](#)

More options

New Line

Delete Line

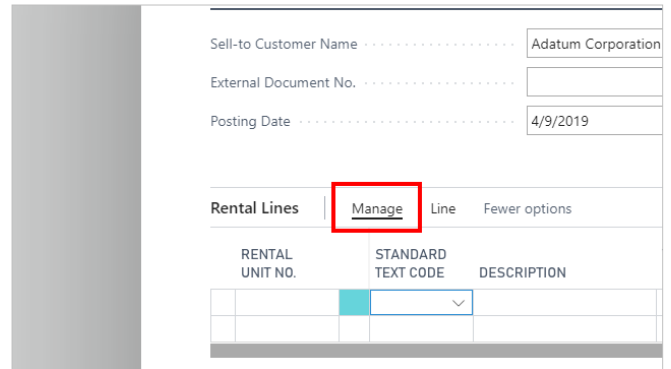
Group Avail Matrix

RENTAL UNIT NO.	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	START DATE	END DATE
RU00001	EAST			4/9/2018	6/4/2018
	EAST			4/9/2018	6/4/2018
	EAST			4/9/2018	6/4/2018

View the Group Availability Matrix page

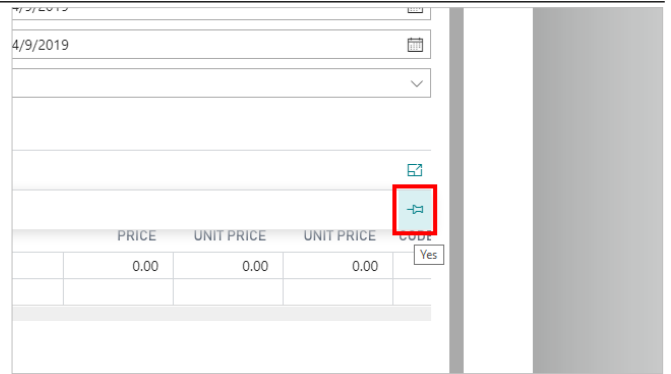
The following steps demonstrate how to set the Rental Lines sub-menu options to always be displayed.

Click on the navigation menu item popup **Manage**



Screenshot of the ODT Rentals Online Help interface. The 'Manage' button is highlighted in a red box. The interface shows a form with fields for 'Sell-to Customer Name' (Adatum Corporation), 'External Document No.', and 'Posting Date' (4/9/2019). Below this is a table with columns 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The 'Manage' button is located in the top right corner of the table area.

Click on the button **Pin**

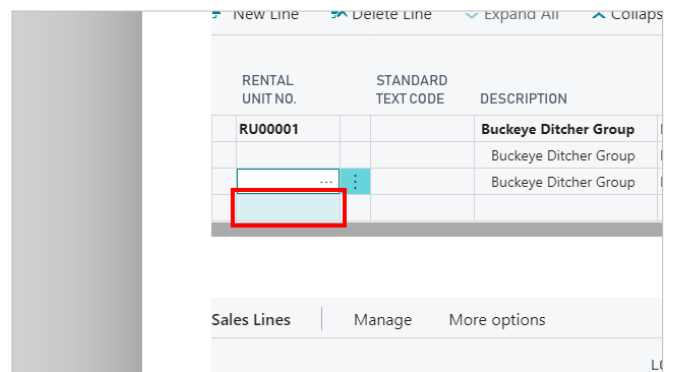


Screenshot of the ODT Rentals Online Help interface. The 'Pin' button is highlighted in a red box. The interface shows a form with fields for 'Posting Date' (4/9/2019) and a table with columns 'PRICE', 'UNIT PRICE', and 'CODE'. The 'Pin' button is located in the top right corner of the table area.

The pinning can be removed by clicking on the Pin button again.

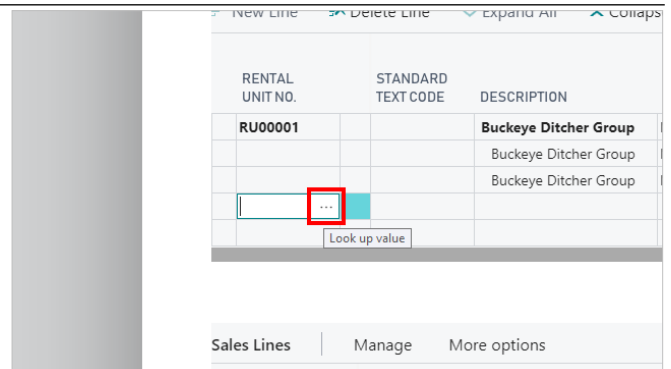
3.3.2.3. Rental Line Entry of a Rental Unit

Click on the cell **Rental Unit No.**



Screenshot of the ODT Rentals Online Help interface. The 'Rental Unit No.' cell is highlighted in a red box. The interface shows a form with fields for 'New Line', 'Delete Line', 'Expand All', and 'Collapse'. Below this is a table with columns 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The 'Rental Unit No.' cell is located in the first row of the table.

Click on the lookup button in the cell **Rental Unit No.**



Screenshot of the ODT Rentals Online Help interface. The lookup button in the 'Rental Unit No.' cell is highlighted in a red box. The interface shows a form with fields for 'New Line', 'Delete Line', 'Expand All', and 'Collapse'. Below this is a table with columns 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The lookup button is located in the first row of the table.



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00004**

Select the Rental Unit to be added to the rental line.

PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	
RU00008	18 G Brad Nailers Group	
RU00008-001	18 G Brad Nailer	

Click on the cell **Rental Terms Code**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-START	2	EAST
	Buckeye Ditcher Group	MONTH-START	1	EAST
	Buckeye Ditcher Group	MONTH-START	1	EAST
	Buckeye Ditcher	MONTH-PEND	1	WEST

Click on the link in cell **Rental Terms Code**

Normally the Rental Term on all rentals will be the same on the quote. Should the Rental Unit selected default in a term that needs to be changed, you will need to select the applicable term.

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-START	2	EAST
	Buckeye Ditcher Group	MONTH-START	1	EAST
	Buckeye Ditcher Group	MONTH-START	1	EAST
	Buckeye Ditcher	MONTH-P	1	WEST

Click on **Code = MONTH-START**, **Description = Monthly Rental for Billing at Start of Contract**

CT000001			
Manage	More options		
Delete Line	Group Avail Matrix		
STANDARD TEXT CODE	DESCRIPTION	CODE	DESCRIPTION
		MONTH-PSTART	Monthly Rental - Per
		MONTH-PSTART-EA	Monthly Rental - Ear
		MONTH-START	Monthly Rental for E
		WEEK-START	Select record "MONTH-START" Weekly Rental for Bi
		WEEK-END-OPT	Weekly Rental for O
		WEEK-END-OPT-TIME	Weekly Rental for O
	+ New		
	Buckeye Ditcher Group	MONTH-P	1 WEST
	Buckeye Ditcher Group		
	Buckeye Ditcher Group		
	Buckeye Ditcher		

ODT Rentals Online Help


Click on the cell **Location Code**

Should Locations be used, the Location specified on the Rental Unit will default to the Rental Line.

LOCATION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL TERMS CODE ALT3
itcher Group	MONTH-START	2	EAST			4/
itcher Group	MONTH-START	1	EAST			4/
itcher Group	MONTH-START	1	EAST			4/
itcher	ITH-START	1	WEST			4/

Click on the cell **Rental Return Date**

Review and either accept the defaulted Rental Return Date or enter the expected date of return.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	5/8/2018	500.00	0.00

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	6/8/2018	500.00	0.00
		4/9/2018	5/8/2018	500.00	0.00
<div> <div>Select a date</div> </div>					

Click on the link **Next**

MONTH-PEND

May 2018

Mo Tu We Th Fr Sa Su Next

RENTAL
START
DATE

4/9/2018

4/9/2018

R1 RENTAL
UNIT PRICE

0.00

AL22 RENTAL
UNIT PRICE

0.00

QTY.



Click on a date in the calendar

For this example, click on June 8.

RENTAL TERMS CODE ALT2	RENTAL START DATE		RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018		0.00	0.00	
	4/9/2018		0.00	0.00	
	4/9/2018		0.00	0.00	
	4/9/2018	5/8/2018	500.00	0.00	0.00

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Today Done

Click on the cell **Rental Unit Price**

The Rental Price defaults from the Rental Price card for the Rental Term selected on the line. This price can be overridden, if desired. Optionally, a Line Discount % could be specified.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	6/8/2018	500.00	0.00	0.00
	4/9/2018	6/8/2018	500.00	0.00	0.00
	4/9/2018	6/8/2018	500.00	0.00	0.00
	4/9/2018	6/8/2018	500.00	0.00	0.00

Click on **Commit Reservation**

Should you wish to reserve the rental unit, then check the Commit Reservation field.

RENTAL PRICE	QTY. TO RENT	LINE DISCOUNT %	RE... DAY BIL...	CO... RE...	ODT TRANSF... ORDER NO.	PARTIAL RETURN DATE
0.00	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0.00	1	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0.00	1	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
0.00	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Create rental lines for all Rental Units or groups to be included in the offer to the customer.

Sales Lines can be completed to record sales as needed. This entry process is the same as the line entry on a Sales Quote and is not covered here.

3.3.2.4. Verification of Expected Billing

Rental Amount lines are automatically created for the rental unit lines. No Rental Amount lines are created for rental unit group lines.

Review the Rental Amount Line to verify what will be billed to the customer and the Billing Date should they chose to move forward with the rental.

To learn about the fields on the Rental Amount Lines, please see ODT Rentals Online help in Processing Rentals, Rental Quotes, Rental Quote Overview - Rental Amount Line Fields chapter.



ODT Rentals Online Help

Click on the navigation menu item **More options**

Sell-to City Atlanta

Sell-to State GA

Sell-to ZIP Code 31772

Sell-to Contact No. CT000001

Rental Lines | [Manage](#) | **More options**

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
RU00001	EAST			4/9/2018

Click on the navigation menu item popup **Line**

Sell-to City Atlanta

Sell-to State GA

Sell-to ZIP Code 31772

Sell-to Contact No. CT000001

Rental Lines | [Manage](#) | **Line** | Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
RU00001	EAST			4/9/2018

Click on the navigation menu item **Rental Amount Lines**

The Rental Amounts that will be displayed are only for the line you are on when the option Rental Amount lines is selected.

This step will need to be repeated for each Rental Line on the quote.

Sell-to State GA

Sell-to ZIP Code 31772

Sell-to Contact No. CT000001

Rental Lines | [Manage](#) | [Line](#) | Less options

Rental Amount Lines [Additional Notes](#)

View the rental amount line records that will be billed for the selected line.

RENTAL UNIT NO.	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2
RU00001	EAST		

Click on the cell **Billing Date** with the value **4/9/2018**

The Billing Date is the expected invoicing Date and represents the earliest date that the invoice can be posted for.

In this example the Billing Date will be the same for both records and will be equal to the Rental Start Date.

LINE	AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVOICE NO.
500.00	525.00	SUPPLIES	4/9/2018			
500.00	525.00	SUPPLIES	4/9/2018	4/9/2018		

NOTE:

Rentals has an additional feature that can be used for early billing, invoicing earlier than the Billing Date.

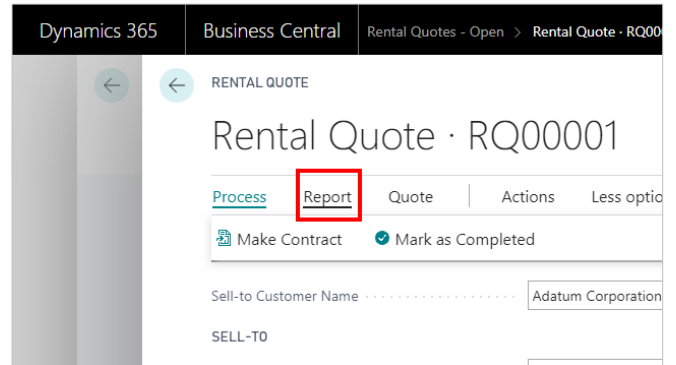
To learn about Early Billing, see ODT Rentals Online Help, Setup Rentals, Rental Terms - How to Set Up Rentals Terms for Early Billing.

To learn about the process for early billing, go to Processing Rentals, Rental Contracts - How to Process a Rental Contract with Early Billing.

3.3.2.5. Printing the Rental Quote

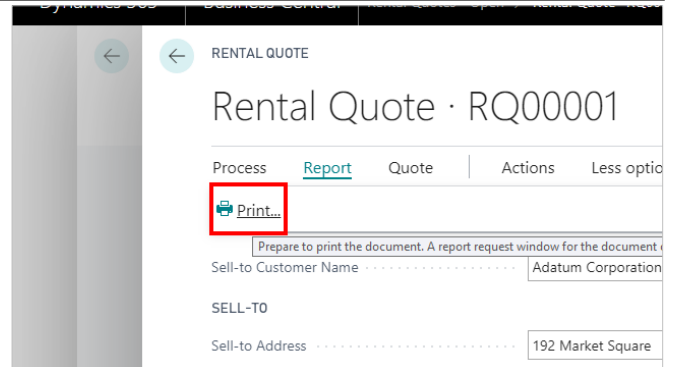
The following demonstrates the steps to print the Rental Quote to PDF.

Click on the navigation menu item popup **Report**



The screenshot shows the 'Rental Quote · RQ00001' screen. The 'Report' button is highlighted with a red box. Other buttons visible include 'Process', 'Quote', 'Actions', 'Less option', 'Make Contract', and 'Mark as Completed'. The 'Sell-to Customer Name' is 'Adatum Corporation'.

Click on the navigation menu item **Print...**

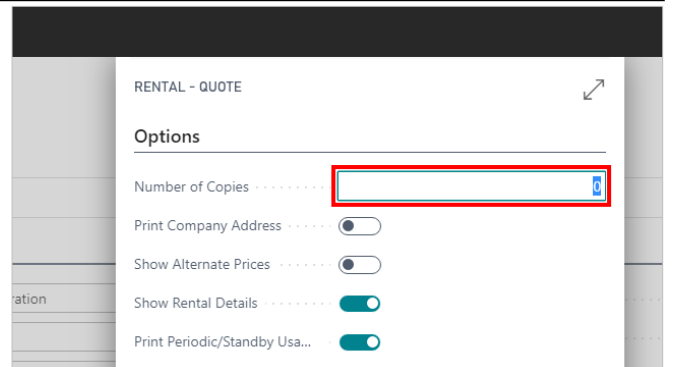


The screenshot shows the 'Rental Quote · RQ00001' screen. The 'Print...' button is highlighted with a red box. Other buttons visible include 'Process', 'Report', 'Quote', 'Actions', 'Less option', 'Make Contract', and 'Mark as Completed'. The 'Sell-to Customer Name' is 'Adatum Corporation'.

Click on the field **Number of Copies**

The No. of Copies field displays 0, which means 1 copy will be printed.

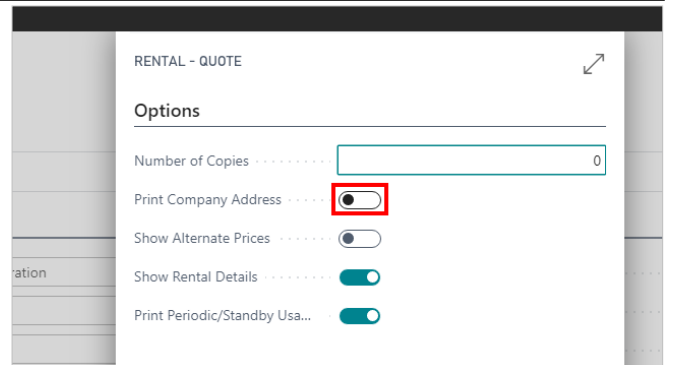
Should 2 copies be needed, then enter 1 in this field.



The screenshot shows the 'RENTAL - QUOTE' screen with the 'Options' section. The 'Number of Copies' field is highlighted with a red box and contains the value '0'. Other options include 'Print Company Address', 'Show Alternate Prices', 'Show Rental Details', and 'Print Periodic/Standby Usa...'.

Click on the toggle field **Print Company Address**

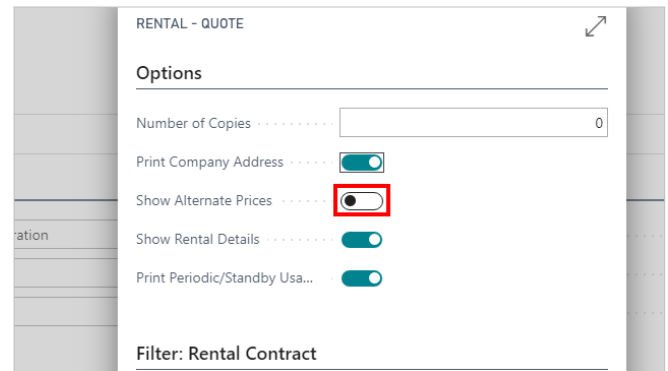
If the Company Address is to print on the quote document, then check the Company Address box.



The screenshot shows the 'RENTAL - QUOTE' screen with the 'Options' section. The 'Print Company Address' toggle switch is highlighted with a red box and is currently turned off. Other options include 'Number of Copies', 'Show Alternate Prices', 'Show Rental Details', and 'Print Periodic/Standby Usa...'.

Click on the toggle field Show Alternate Prices

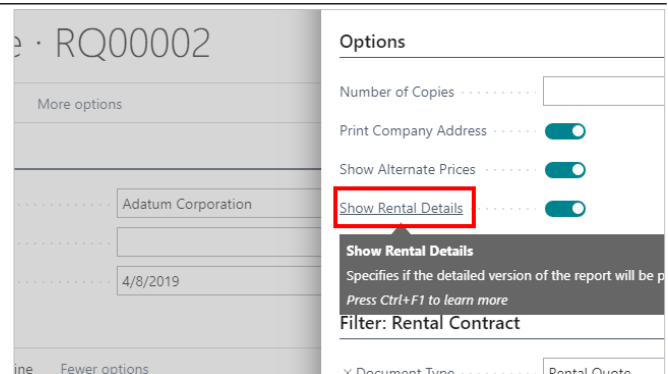
Should Alternative Terms and Prices be on the Rental Lines and it is desired to have these print on the quote document, then this field must be set to Yes.



Click on the link **Show Rental Details**

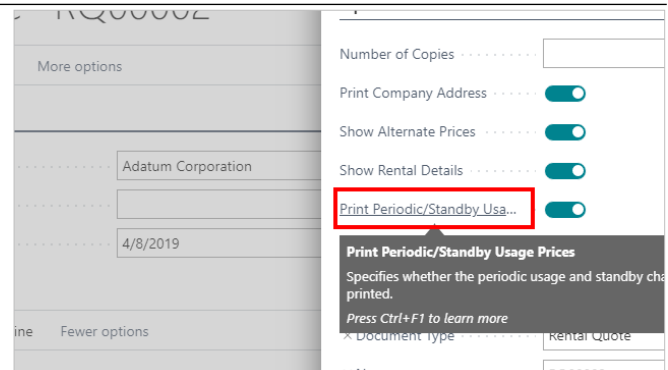
The Show Rental Details field is set to Yes by default.

When the field is changed to No, then if the quote rental lines have units which have Additional Notes, then these notes will not print on the quote document.



Click on the link **Print Periodic/Standby Usage Prices**

This option is only for use when the units on the rental lines have the Periodic Usage Enabled field enabled.



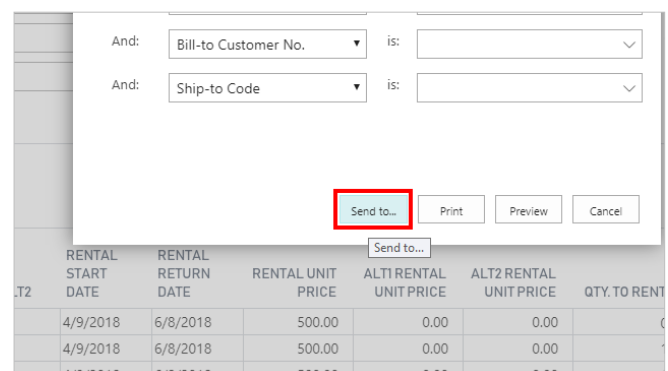
The setting selected on the Print Periodic/Standby Usage Prices field when printing the contract, overrides the setting on Rental Management Setup.

When the Print Periodic/Standby Usage Prices field is enabled, then when a unit on the rental lines has periodic/standby pricing configured on the rental price cards, the prices will print on the document. When disabled, then the prices will not print.

Click on the button **Send to...**

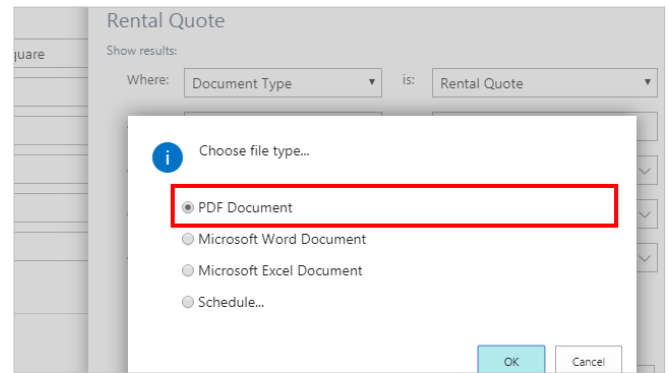
In the page that opens, select the type of document to be printed.

Then select the OK button.

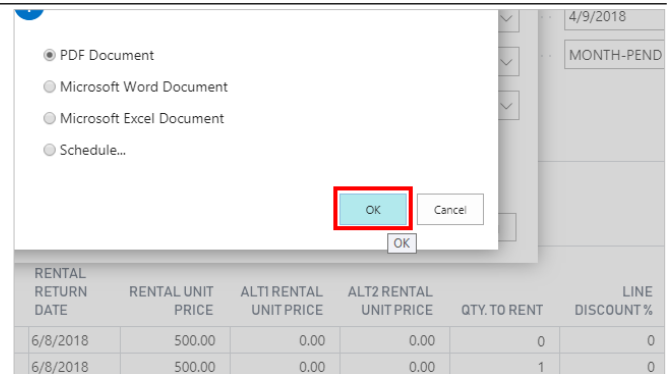


RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT
4/9/2018	6/8/2018	500.00	0.00	0.00	
4/9/2018	6/8/2018	500.00	0.00	0.00	
4/9/2018	6/8/2018	500.00	0.00	0.00	

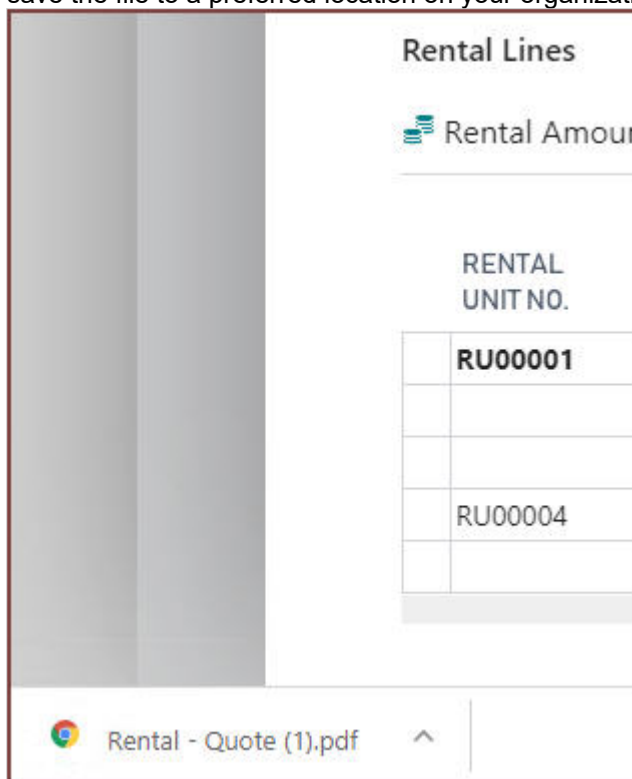
Click on the item **PDF Document**



Click on the button **OK**

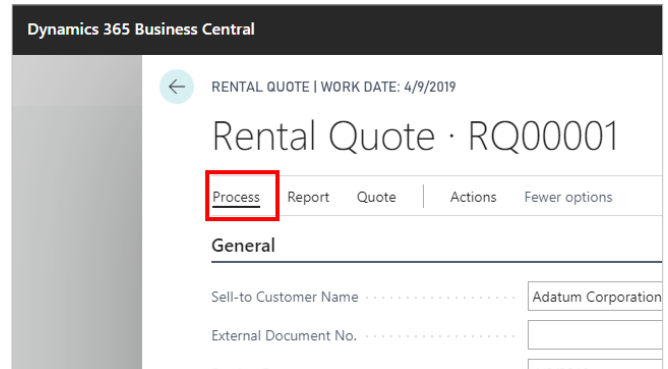


The PDF document will show at the bottom left of the window. Click on the document to open it, then print or save the file to a preferred location on your organizations network.

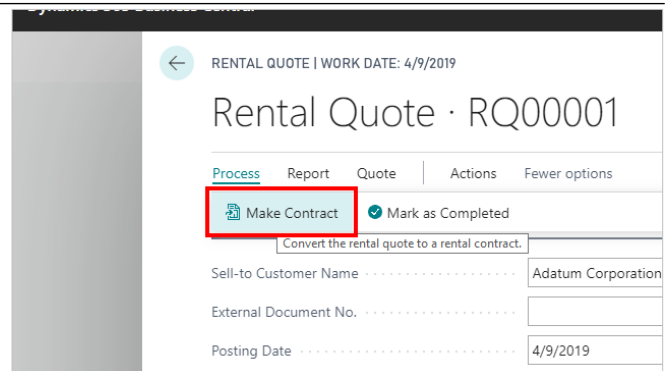


3.3.2.6. Convert the Rental Quote to a Rental Contract

Click on the navigation menu item popup **Process**

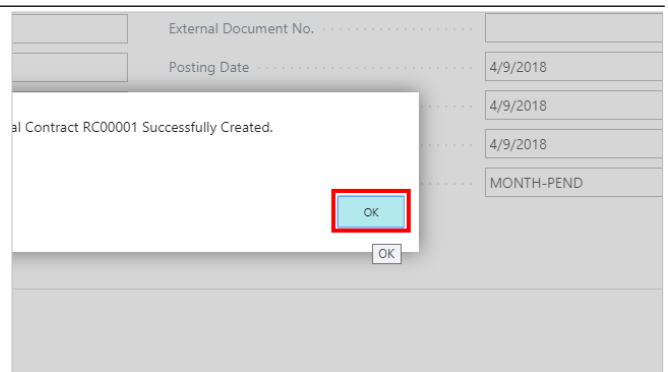


Click on the navigation menu item **Make Contract**



When Ok is selected, the Rental Contract which was created is automatically opened.

Click on the button **OK**



3.3.3. How to Create a Rental Quote Using a Contact

3.3.3.1. Overview

The Rentals provides the ability to create a Rental Quote by selecting a Contact instead of a Sell-to Customer.

This feature contains the same functionality as when creating a Sales Quote using a Contact.

A Customer Template must exist, in which the Territory Code, Country/Region Code and Type, match up with the Contact.

When converting the Rental Quote to a Rental Contract, the user is prompted with a confirmation message for creating a Customer.

When the user confirms the Customer is to be created, the customer is created using the Sell-to Customer Template populated on the Rental Quote header. And then the Rental Contract is created.

NOTE:

The Customer card must be reviewed, and any mandatory fields not included in the Customer Template, must be populated.



A Rental Quote can as well be created directly from a Contact card.

To learn about creating rental documents from a Contact card, please see ODT Rental Online Help, Processing Rentals, Creating Rental Documents from a Contact Card.

3.3.3.2. **How to Create a Rental Quote Using a Contact**
Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

Click on the navigation menu item **Rental Quote**

Posted Documents ▾ Setup & Extensions ▾

Documents Transfer Orders Rental Quotes Rental Contracts Rental Periods Rental Terms

ACTIONS

+ Sales Quote	+ Sales Return Order	+ Rental Contract
+ Sales Invoice	+ Sales Credit Memo	+ Rental Units
+ Sales Order	+ Rental Quote	> Tasks

Create a new rental quote to offer customer

Click on the button **Show more**

...

Show more

...

...

...

...

Click on the field **Sell-to Contact No.**

...

...

...

...

...

...

...

Click on the lookup button **Look up value**

...

...

...

...

...

...

...



ODT Rentals Online Help

Click on the link in cell **No.** with the value **CT000023**

Select the Contact that the Rental Quote is for.
This can be a Contact that has either a Type of
Person or Company.

Rental Lines	Manage	More	CT000006	Meagan Bond
			CT000003	Trey Research
			CT000004	Helen Ray
			CT000017	Wide World Importers
			CT000018	Toby Rhode
			CT000021	World Wide Bank
			CT000022	World Wide Bank
			CT000023	Joe Rental
			Select record "CT000023"	
Sales Lines	Manage			
TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
				0

Click on the field **Sell-to Customer Template Code**

Verify that the Sell-to Customer Template Code field
is populated.

If the field is blank, then look-up and select the
applicable Customer Template.

Joe Rental

ite Code

CUST000002

4/9/2018

4/9/2018

4/9/2018

CRITICAL

On the Invoicing tab, ensure the Tax Area Code is populated prior to entering the Rental and Sales Lines, if
applicable. If not, then look-up and select the applicable Tax Area Code.

Complete the Rental Lines and, if applicable, the Sales Lines.

Click on the cell **Rental Unit No.**

Rental Lines

Manage

More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.

STANDARD TEXT CODE

DESCRIPTION

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines

Manage

More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.

STANDARD TEXT CODE

DESCRIPTION

Sales Lines

Manage

More options



ODT Rentals Online Help

Click on the link in cell **No.** with the value **BD-006**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
Select record "BD-006"		Buckeye Ditcher Group
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

← RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ000002

ProcessReportQuoteActionsFewer options

General

Sell-to Customer Name

SELL-TO

Click on the navigation menu item **Make Contract**

← RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ000002

ProcessReportQuoteActionsFewer options

Make ContractMark as Completed

Convert the rental quote to a rental contract.

Sell-to Customer Name

SELL-TO

Sell-to Address111 - 1st Street

Click on the button **Yes**

Order Date4/9/2018

4/9/2018

?

You cannot Make Contract unless you specify a customer on the quote.

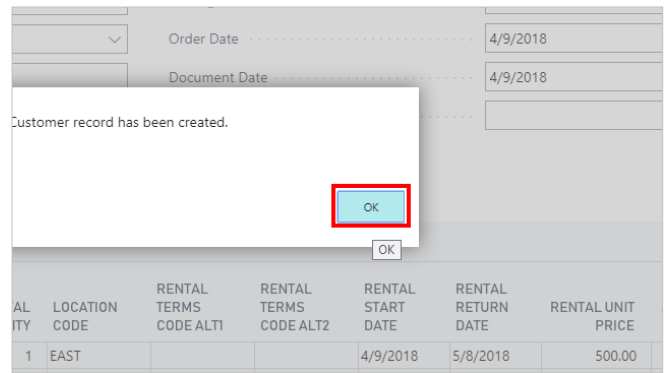
Do you want to create customer(s) now?

YesNo

Yes

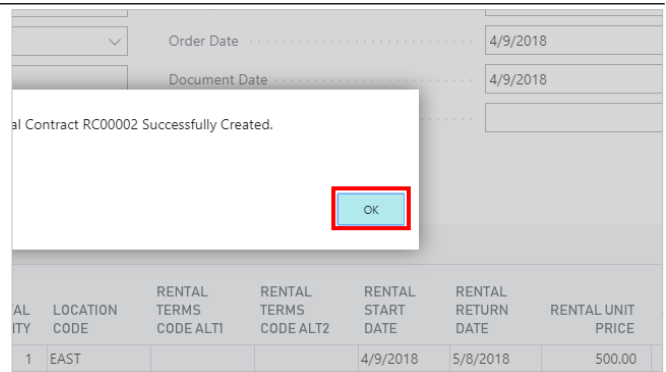
RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
1	EAST			4/9/2018	5/8/2018	

Click on the button **OK**



AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
1	EAST			4/9/2018	5/8/2018	500.00

Click on the button **OK**



AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
1	EAST			4/9/2018	5/8/2018	500.00

3.3.4. How to Assign a Quote Loss Reason and Mark as Completed

3.3.4.1. Overview

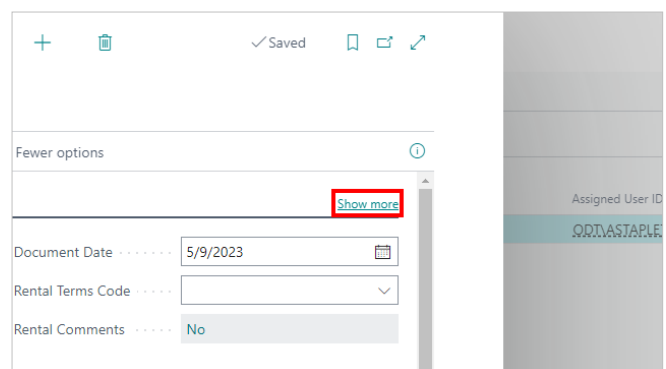
On Rental Quotes when the Customer decide to not go forward with the rental a Quote Loss Reason can be selected on the quote. Then the Rental Quote can be closed by selecting Mark as Completed in the Home menu.

The Quote Loss Reason Code has been added to the Completed Rental Quote List to provide an easy means to see which quotes were lost and why.

3.3.4.2. How to Assign a Quote Loss Reason and Mark as Complete

The following demonstrates assigning a Quote Loss Reason, marking the quote as completed and reviewing the Completed Rental Quote list.

Click on the button **General, Show more**



Fewer options ⓘ

Document Date 5/9/2023

Rental Terms Code ▾

Rental Comments No

Assigned User ID
ODT\ASTAPLETON



ODT Rentals Online Help

Click on the lookup button **Quote Loss Reason**

Click on the cell **Description** with the value **Inadequate knowledge of cust**

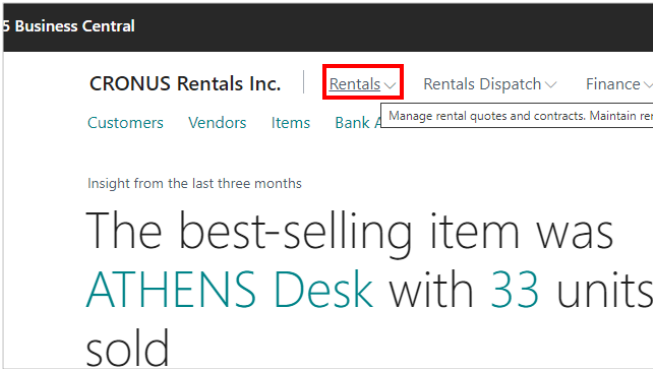
Code	Description	Type
BUSINESS_L	Inadequate knowledge of cust	Lost
BUSINESS_W	Knowledge of cust. business	Won
CONSULT_L	Ineffective consultant	Lost
CONSULT_W	Competent consultant	Won
CP	Closed from Commerce Portal	Won

Click on the navigation menu item popup **Home**

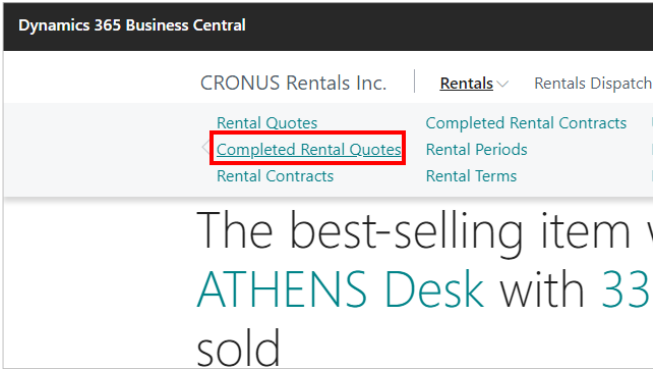
Click on the navigation menu item **Mark as Completed**



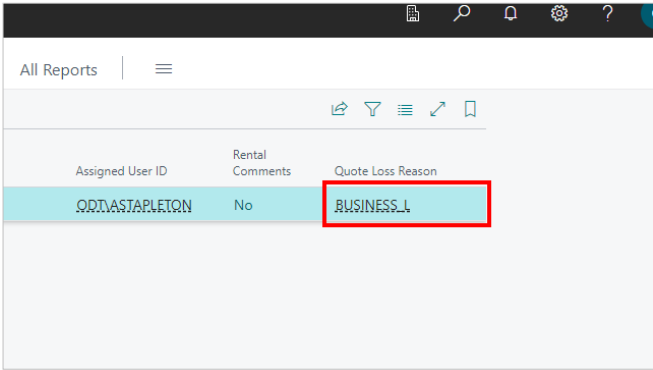
Click on the navigation menu item popup **Rentals**



Click on the navigation menu item **Completed Rental Quotes**



Click on the cell **Quote Loss Reason** with the value **BUSINESS_L**



3.3.5. How to Add Internal Comments to Rental Documents

3.3.5.1. Overview

Multiple internal comments can be added to the Rental Quote and Rental Contract.

The internal comments page contains a boolean field, Print on Pick Lists, which when checked specifies that the internal comments are to print on the pick lists.

The internal comments when entered on a Rental Quote will flow through to the Rental Contract when Make Contract is ran.

Links, Notes and File Attachments can be added to the Rental Quote, which will flow through to the Rental Contract.

To learn about adding Links, Notes and File Attachments to rental documents, see ODT Rental Online Help, Additional Rental Processes, Links Notes and Attachments.

3.3.5.2. How to Add Internal Comments to Rental Quotes

Profile - Sales Order Processor



ODT Rentals Online Help

The same steps can be used by a user having the Business Manager Profile.

The following demonstrates the entry of an internal comment.

Click on the navigation menu item **Rental Quote**

The screenshot shows the Dynamics 365 navigation pane. Under the 'Rental Packages' section, there is an 'ACTIONS' group. Within this group, the '+ Rental Quote' link is highlighted with a red rectangular box. Other visible links include '+ Sales Quote', '+ Purchase Quote', '+ Sales Order', '+ Purchase Order', '+ Sales Invoice', '+ Purchase Invoice', and '+ Rental Unit'.

Click on the field **Sell-to Customer Name**

The screenshot shows the 'New Rental Quote' form in Dynamics 365. The 'Sell-to Customer Name' field is highlighted with a red rectangular box. Below this field, there are input fields for 'External Document No.' and 'Posting Date'.

Click on the link in cell **No.** with the value **10000**

The screenshot shows the 'General' tab of the 'New Rental Quote' form. A dropdown menu is open for the 'Sell-to Customer Name' field, displaying a list of customer records. The record with 'No.' 10000 and 'NAME' Adatum Corporation is highlighted with a red rectangular box. Other visible records include '30000 School of Fine Art', '40000 Alpine Ski House', and '50000 Relecloud'.

Click on the navigation menu item popup **Quote**

The screenshot shows the 'Quote' popup in the 'New Rental Quote' form. The popup displays the title 'Rental Quote · RQ00001' and the 'Quote' tab is selected. The 'General' section shows the 'Sell-to Customer Name' field populated with 'Adatum Corporation'.



ODT Rentals Online Help

Click on the navigation menu item **Comments**

RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ00001

Process Report Quote Actions Fewer options

Dimensions Customer Contact **Comments**

View or add comments from the record

Sell-to Customer Name Adatum Corporation

External Document No.

Posting Date 4/8/2019

Click on the cell **Date** with the value **4/8/2019**

The date defaults from the user work date and can be overridden.

Rental Qu

Process Report Quo

General

Sell-to Customer Name

External Document No.

Posting Date

Rental Comment Sheet

Search + New Edit List Delete

DATE	COMM
4/8/2019	

Type the date in the format M/d/yyyy

Click on the cell **Comment**

ment Sheet

Edit List Delete Open in Excel

COMMENT

Enter the text **Customer will call to confirm delivery date.**

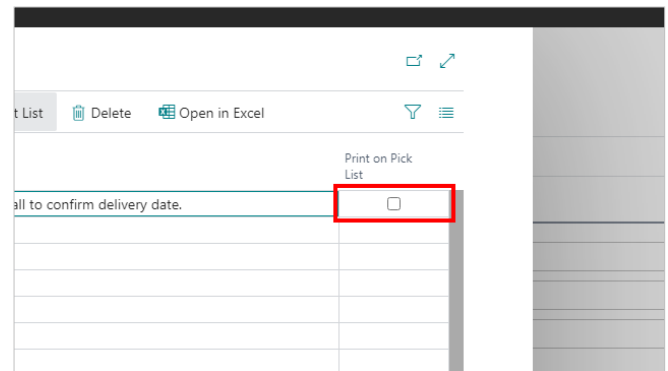
ment Sheet

Edit List Delete Open in Excel

COMMENT
Customer will call to confirm delivery date.

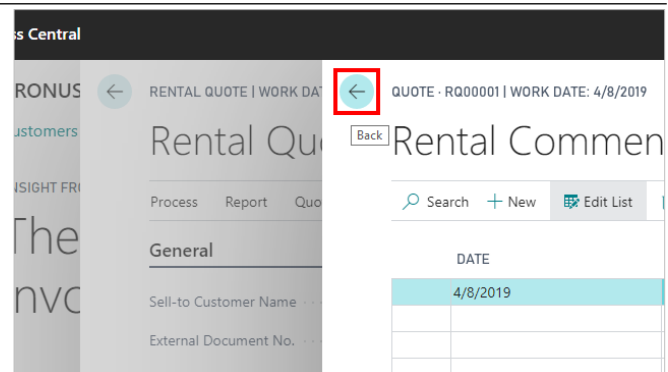
Click on the cell **Print on Pick List**

If the comment line is to print on the Pick lists then check the boolean box.



The screenshot shows a table with a column labeled 'Print on Pick List'. A red box highlights a checkbox in this column, which is currently unchecked. The table also has a header row with a 'Delete' button and an 'Open in Excel' button.

Click on the back button



The screenshot shows a 'Rental Quote' form with a 'Back' button highlighted by a red box. The form also includes a 'Rental Comment' section and a 'DATE' field set to '4/8/2019'.

3.3.6. Rental Quote Archiving

3.3.6.1. Overview

Rental Quote Archiving provides the ability to archive Rental Quotes and restore the original quote, if needed. The Rental Quote can be archived multiple times, saving a different archived version each time.

For archived Rental Quotes where the original quote is still open, you can use the Restore action to overwrite the current quote with an archived version.

From a Rental Quote that has been archived, a list of the archived quote versions can be accessed from the General tab, No. of Archived Versions field which is visible when Show more is selected.

A full listing of all archived Rental Quotes can be viewed from the Rental Quote List Archive. The Rental Quote List Archive can be accessed using Search.

Archiving

In addition to the Rental Quote header, Rental Lines and Sales Lines, the following rental data on a Rental Quote are archived:

- Rental Quote, Rental Line and Sales Lines attachments
- Additional Notes
- Rental Calendar selections
- Certificates of Insurance
- Electronic Signatures

The Notes on a Rental Quote are not archived.

Restoring

- A Comment is automatically created on the quote
- Rental Lines are deleted, and new lines created from the archive document
- Sales Lines are deleted, and new lines created from the archive document
- Item tracking lines are not archived, therefore must be re-selected on rental and sales lines
- Additional Notes are restored

- Rental Calendar selections are restored

- Certificates of Insurance are restored
- For Rental Units linked to Items, if commit reservation is checked on Rental Line on the archived quote line, the original Transfer Order is deleted when the lines are deleted, and a new Transfer Order is created.

- Rental Quotes with a Job No. specified on the General tab that has Link Rental cont. to JPL enabled, the budget lines on the Job are deleted and recreated during the restore

The following archived data is not restored from the Archived Rental Quote:

- Item Tracking Lines on Rental Lines with Rental Units linked to Items with Serial No. or Lot tracking, therefore, will need to be re-selected.
- Item Tracking Lines on Sales Lines, therefore, will need to be re-selected.

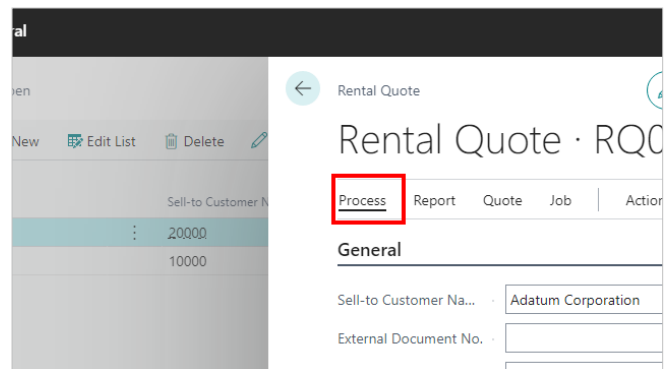
The restoring of an Archived Rental Quote cannot be processed when:

- The Rental Quote has been converted to a Rental Contract or Mark as Complete has been ran on the quote
- If the original quote had a Job Template No. on the General tab when archived, but after archiving the Create Job was ran on the quote.

3.3.6.2. How to Archive Rental Quotes

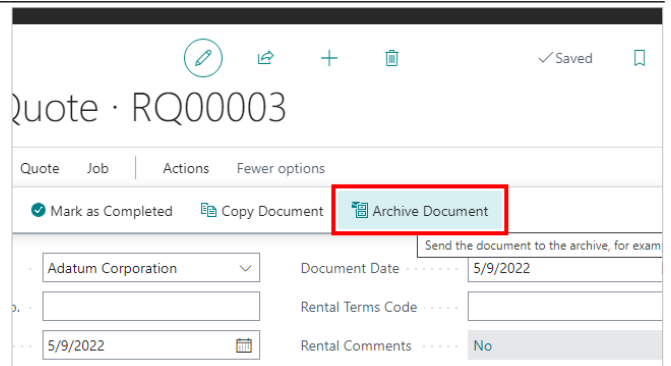
The following demonstrated the archiving of a Rental Quote and how to view the archived quote version list and card from the quote.

Click on the navigation menu item popup **Process**



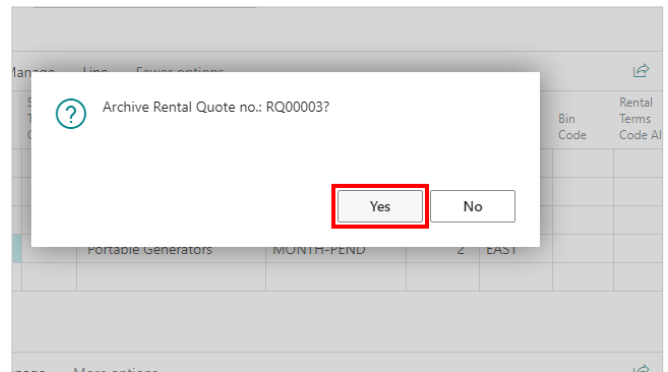
The screenshot shows the 'Rental Quote · RQ00003' interface. On the left, there is a list of items with columns for 'Sell-to Customer Name', 'Quantity', and 'Unit Price'. The 'Process' button is highlighted in a red box in the top right corner of the interface.

Click on the navigation menu item **Archive Document**

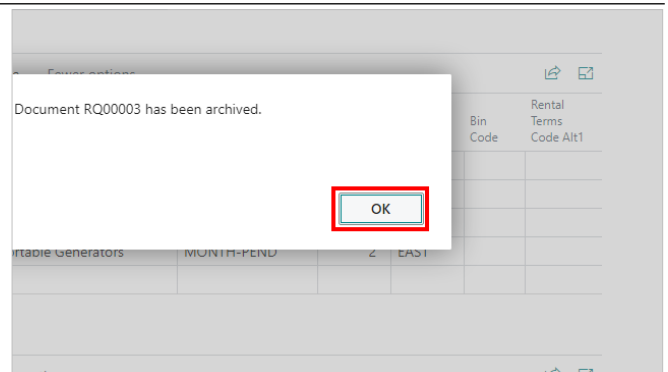


The screenshot shows the 'Rental Quote · RQ00003' interface. In the top right corner, there is a 'Saved' status. Below the title bar, there are tabs for 'Quote', 'Job', and 'Actions'. The 'Archive Document' button is highlighted in a red box. Below the buttons, there are input fields for 'Adatum Corporation', 'Document Date' (5/9/2022), 'Rental Terms Code', and 'Rental Comments' (No).

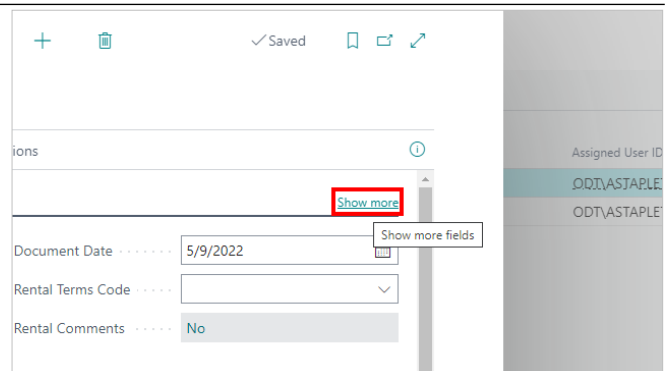
Click on the button **Yes**



Click on the button **OK**

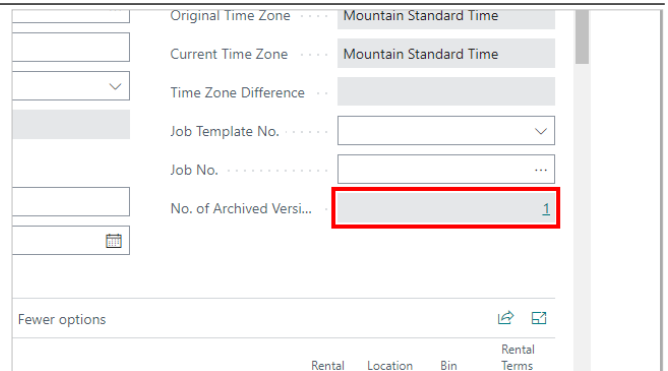


Click on the button **General, Show more**

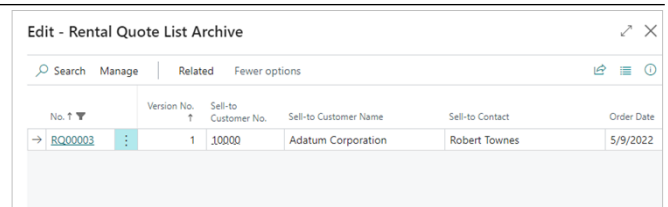


Click on the field **No. of Archived Versions**

When the quantity is clicked on a list of the archived quotes created from the quote is displayed.



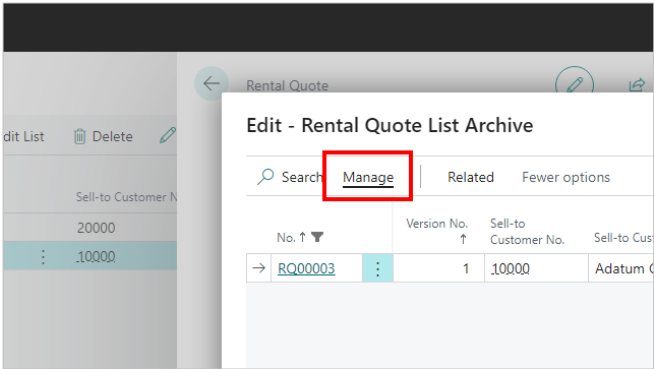
Archived Rental Quote List



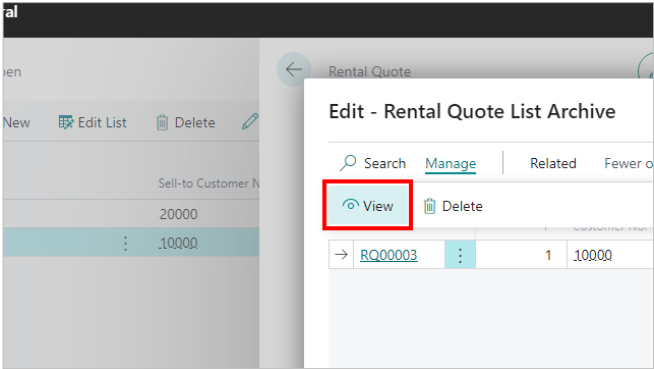
No. ↑	Version No. ↑	Sell-to Customer No.	Sell-to Customer Name	Sell-to Contact	Order Date
→ RQ00003	1	.10000	Adatum Corporation	Robert Townes	5/9/2022



Click on the navigation menu item popup **Manage**

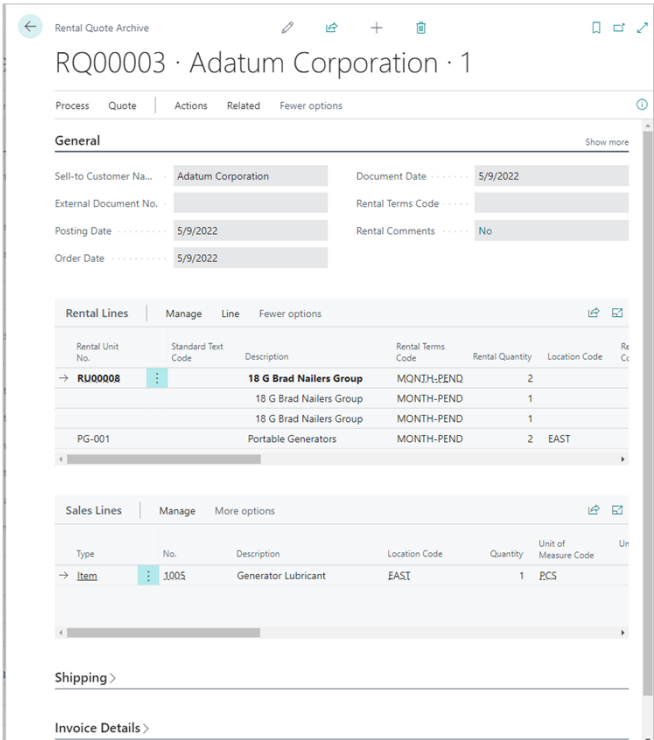


Click on the navigation menu item **View**



The archived quote version can as well be opened by double clicking on the No. of the archived version record that you want to open.

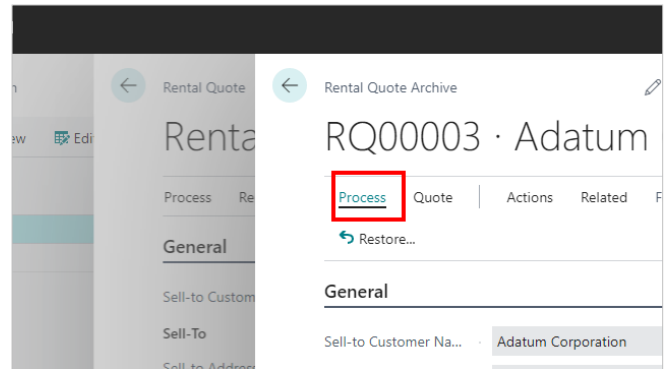
Archived Rental Quote Document



The following provides a review of the Archived Rental Quote menu options.

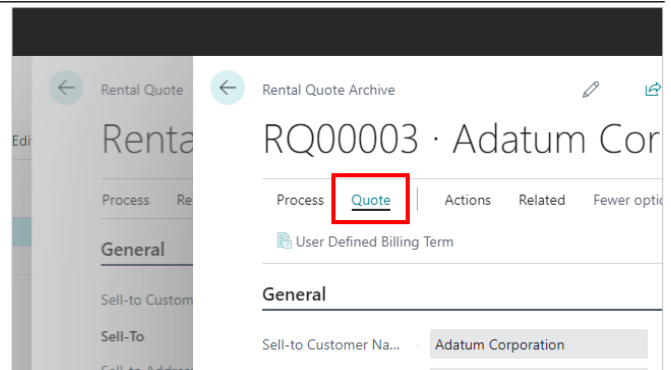
Click on the navigation menu item popup **Process**

The Process menu option contains the sub-menu option of Restore, which can be selected to restore the archived version to the open Rental Quote.



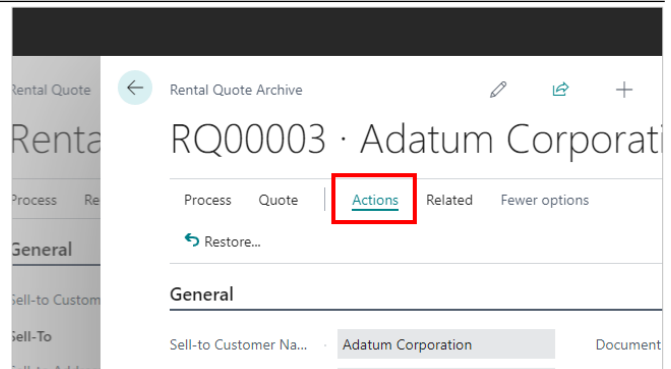
Click on the navigation menu item popup **Quote**

The Quote menu option contains the sub-menu option of User Defined Billing Term, which is only selectable to view the term details when a User Defined Billing Term is on the General Tab, Rental Terms Code field.

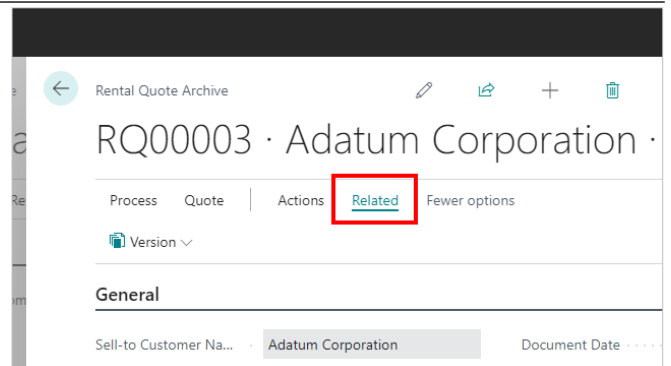


Click on the navigation menu item popup **Actions**

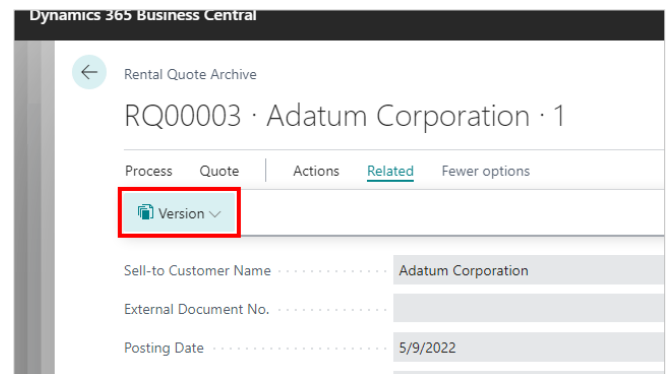
The Actions menu option contains the sub-menu option of Restore, which can be selected to restore the archived version to the open Rental Quote.



Click on the navigation menu item popup **Related**



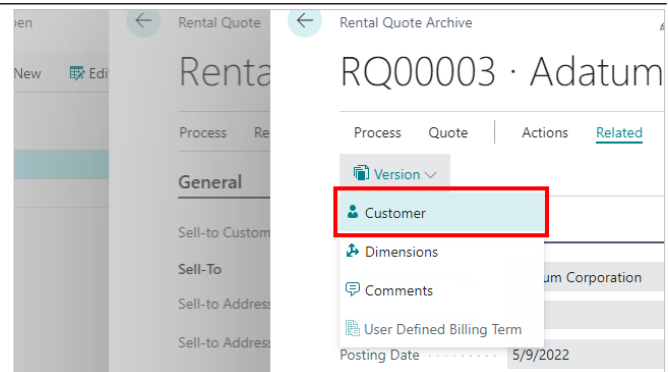
Click on the navigation menu item popup **Version**



Click on the navigation menu item **Customer**

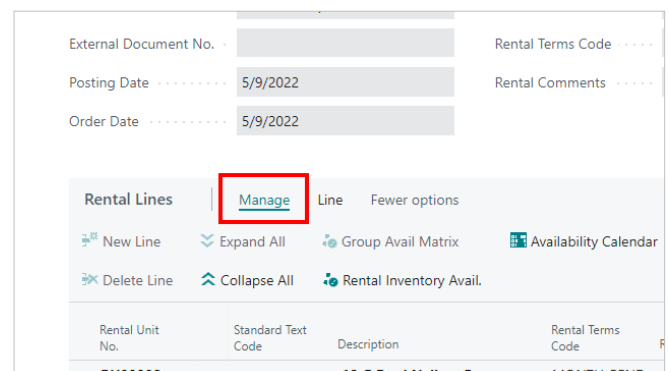
The Version sub-menu options provide the ability to view the Customer, Dimensions, Comments and User Defined Billing Term.

The User Defined Billing Term option is only selectable to view when the Rental Quote Archive has a User Defined Billing Term on the General Tab, Rental Terms Code field.



The following provides a review of the Rental Line menu options.

Click on the navigation menu item popup **Manage**

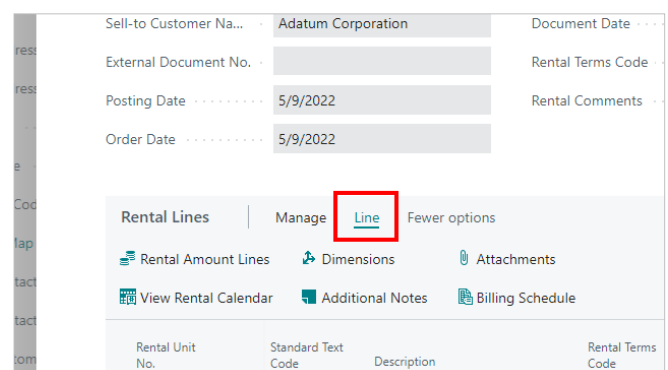


The Manage sub-menu options of New Line and Delete Line are not selectable.

The Collapse All and Expand All are selectable, which collapse and expand Rental Group child Rental Lines. The Group Avail. Matrix, Rental Inventory Avail. and Availability Calendar are selectable to view the applicable availability.

The Line sub-menu options provide the ability to view the related line data for the displayed options.

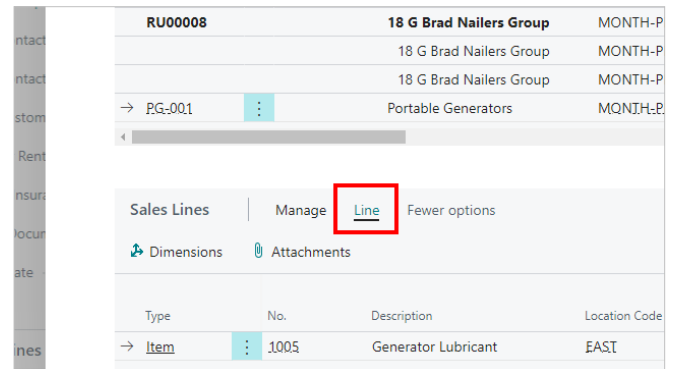
Click on the navigation menu item popup **Line**



The following displays the Sales Lines, Line sub-menu options for reviewing of the related data.

The Sales Lines Manage sub-menu options of New Line and Delete Line are not selectable.

Click on the navigation menu item popup **Line**

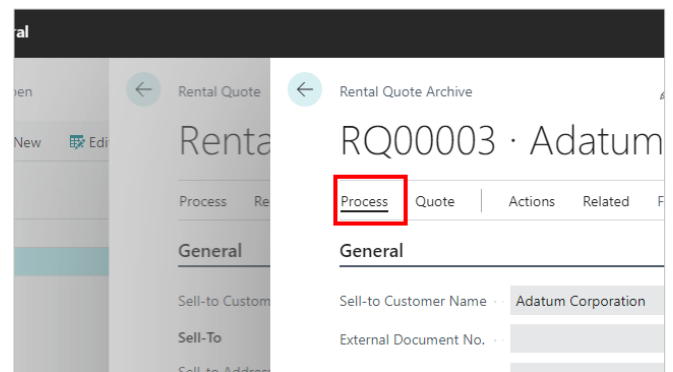


The screenshot shows a table with columns: RU00008, 18 G Brad Nailers Group, MONTH-P. Below the table, there is a 'Sales Lines' section with a 'Line' button highlighted in a red box. Other buttons include 'Manage', 'Fewer options', 'Dimensions', and 'Attachments'.

3.3.6.3. How to Restore an Archived Rental Quote

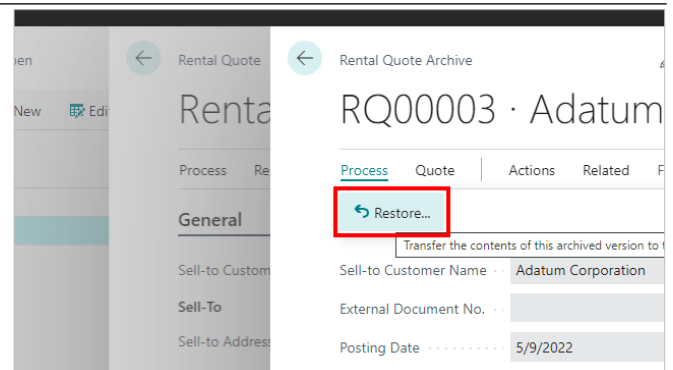
The following demonstrates how to restore an archived quote version that has been opened from the list.

Click on the navigation menu item popup **Process**



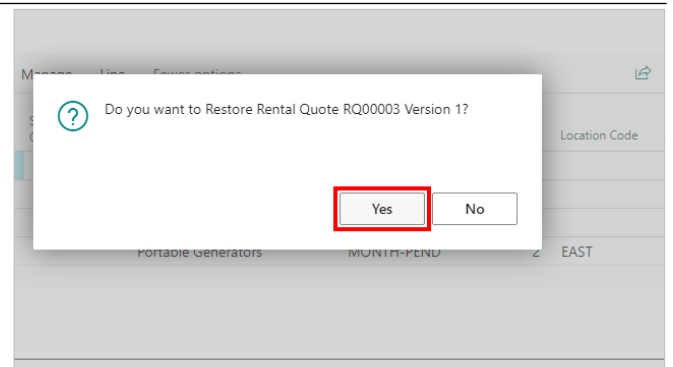
The screenshot shows the 'Rental Quote Archive' page for 'RQ00003 · Adatum'. The 'Process' button is highlighted in a red box. Other buttons include 'Quote', 'Actions', and 'Related'.

Click on the navigation menu item **Restore...**



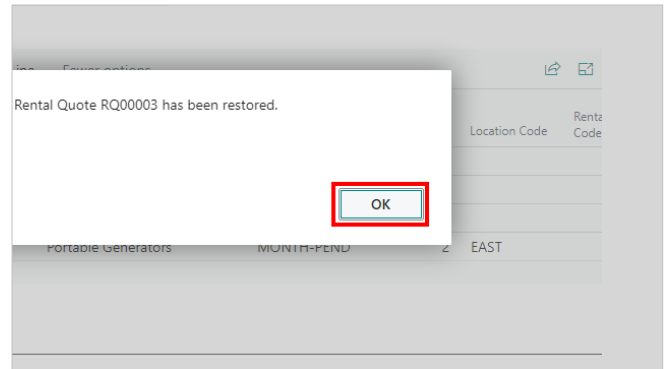
The screenshot shows the 'Rental Quote Archive' page for 'RQ00003 · Adatum'. The 'Restore...' button is highlighted in a red box. Other buttons include 'Process', 'Quote', 'Actions', and 'Related'.

Click on the button **Yes**



The screenshot shows a confirmation dialog box with the text: 'Do you want to Restore Rental Quote RQ00003 Version 1?'. The 'Yes' button is highlighted in a red box. Other buttons include 'No'.

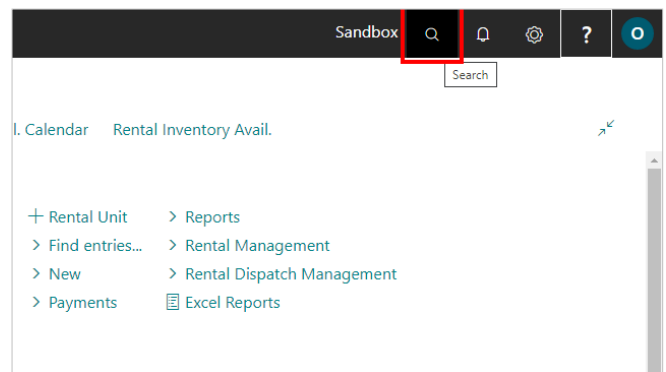
Click on the button **OK**



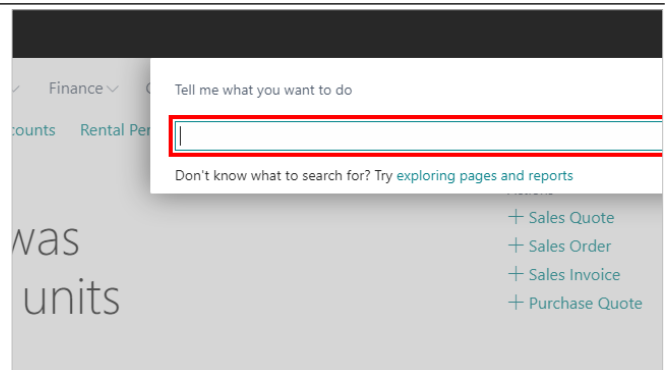
3.3.6.4. Rental Quote Archive List

The following demonstrates accessing the Rental Quote Archive List which displays a listing of all Rental Quote Archived versions.

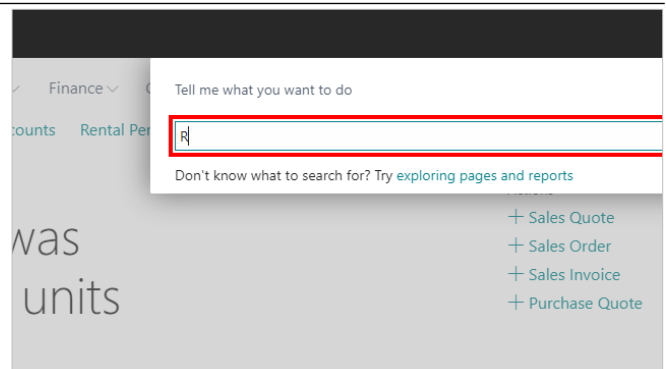
Click on the link **Search**



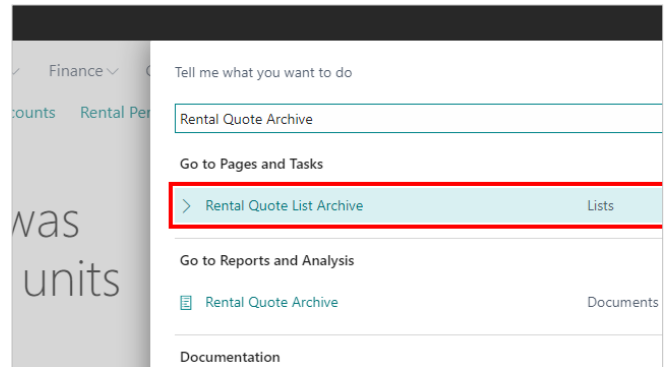
Click on the field **Tell me what you want to do**



Enter **Tell me what you want to do**.



Click on **Rental Quote List Archive Lists** ☐



The list of archived Rental Quotes needs to be reviewed periodically and the old version records for Rental Quotes that are now Completed Rental Quotes should be deleted.

In order to delete older archives, select the records that are to be deleted using the the line - Select More option, then the Manage - Delete menu option.

3.3.7. How to Mark a Quote as Complete and Re-Open a Quote

3.3.7.1. Overview

Rentals provides the ability to close Rental Quotes to maintain a management or audit trail of all Rental Quotes created.

In addition, a Completed Rental Quote can be re-opened.

These features are used, in essence, to close the Rental Quote should the customer decide they do not wish to move forward with the rental. When selected the quote is flagged as completed.

And then, should the customer change their mind and decide to move forward with the rental, the Rental Quote now in the Completed Rental Quotes can be re-opened.

Thus ensuring the quote is the same as previously provided to the customer, and saving the time of having to re-create the Rental Quote.

If you are using the Business Manager Role Center, the Completed Rental Quotes can be accessed by selecting the Rental activity option.

If you are using the Sales Order Processor Role Center, the Completed Rental Quotes are available in the Posted Documents activity option.

3.3.7.2. How to Mark the Quote as Complete and Re-Open the Quote

Business Manager Profile

The following steps demonstrate the process for marking a Rental Quote as complete, and how to re-open the quote.



Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ00002

Process

Report

Quote

Actions

Fewer options

General

Sell-to Customer Name Joe Rental

SELL-TO

Click on the navigation menu item **Mark as Completed**

Dynamics 365 Business Central

RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ00002

Process

Report

Quote

Actions

Fewer options

Make Contract

Mark as Completed

Mark the rental quote as completed. This option

Sell-to Customer Name Joe Rental

SELL-TO

Sell-to Address 111 - 1st Street

Click on the navigation menu item popup **Rentals**

When using the Sales Order Processor Profile, the Completed Rental Quotes are located in the Posted Documents menu option.

365 Business Central

CRONUS Rentals, Inc. | Rentals Finance Cash Management

Customers Vendors Items Ban Manage rental quotes and contracts. Maintain rental u

INSIGHT FROM THE LAST THREE MONTHS

You closed 16 more deals t
in the same period last year

Click on the navigation menu item **Completed Rental Quotes**

Dynamics 365 Business Central

CRONUS Rentals, Inc. | Rentals Finance Cash M

Rental Quotes

Completed Rental Quotes

Rental Contracts

Completed Rental Contracts

Rental Periods

Rental Terms

Rental I

Rental I

Posted

You closed 16 more dea
in the same period last

Click on the link in cell **No.** with the value **RQ00002**

Select the Rental Quote, which is to be re-opened.

CRONUS Rentals, Inc.			Rentals	Finance	Cash M
Completed Rental Quotes:			All	Search	Quote
NO.		SELL-TO CUSTOMER NO.	SE		
RQ00001	:	10000	Ad		
RQ00002	:	C00010	Joe		
Open record "RQ00002" in a new window					

Click on the navigation menu item **Re-Open Quote**

Dynamics 365 Business Central

COMPLETED RENTAL QUOTE | WORK DATE: 4/8/2019

Rental Quote · RQ00002

Re-Open Quote

More options

General

Mark the rental quote as open.

Sell-to Customer No. C00010

Name Joe Rental

3.4. Rental Contracts

3.4.1. Rental Contract Overview

3.4.1.1. Overview

Users have the ability to enter both rentals and sales on a Rental Contract, as the contract document contains both Rental Lines and Sales Lines.

The Sales information already included in Dynamics 365 Business Central has not been included here. Please review the Dynamics 365 Business Central help, Sales documentation for additional details.

Rental Contract processing help is provided, which contains examples for processing a variety of pricing schemas and features.

Rental Contract processing help is located in the ODT Rental Online Help, Processing Rentals, Rental Contracts and Rental Contracts with Rental Units Linked to Items.

Other features and processes available when processing Rental Contracts include the following. Internal comments can be added to the Rental Contract, which flow through to the Completed Rental Contract.

- To learn about adding internal comments to a rental document, please see ODT Rental Online Help, Processing Rentals, Rental Quotes, How to Add Comments to Rental Documents.

A brief description of the following features is available in the ODT Rental Online Help, Processing Rentals, Introduction to Processing Rentals.

To learn about these features and process, see ODT Rental Online Help, Processing Rentals.

- How to Process Contract for various pricing schemas
- How to Setup and Process Contracts for Blank Rental Returns
- How to Copy Rental Contracts and Rental Quotes
- How to Batch invoice Rental Contracts
- How to Undo Rental Shipments

ODT Rentals Online Help

- Pending Shipments and Returns
- How to Process Partial Shipments and Returns
- Swap or exchange Rental Units that have been shipped on a Rental Contract at any time during a contract
- Bulk Returns
- Rental Rapid Returns
- Returning Rental Units to a Different Location
- Undo Returns
- Rental Credit Memos

The following is a list of additional rental features and processes. To learn about these additional features, see ODT Rental Online Help, Additional Rental Processes.

- Rental Sales Kits
 - Rental Packages
 - Metered Usage Billing and Tracking for Maintenance
 - Periodic Usage and Standby Charges
-
- Rental Custom Calendar for flagging days as non-billable or to bill at a Standby Price
 - Subcontracting rental product
 - Transfer Rental Contract lines to a new contract
 - Advanced Proforma Invoice
 - Process Contracts Across Time Zones
 - Integration with Jobs
 - Rentals Dispatch
-
- Rental Accruals and Deferrals
 - Rental Line Discounts
 - Rental FA Transfers and Transfer Journal
 - How to add Links Notes and Attachments
 - Certificates of Insurance Tracking
 - Electronic Signatures
 - Additional Notes for Rentals
 - Rental Categories and Attributes
-
- Rental Payment Services
 - Change Log View
 - Rental Approval Workflows
 - Rentals Interaction Logging

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, in a United States company. Therefore, the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

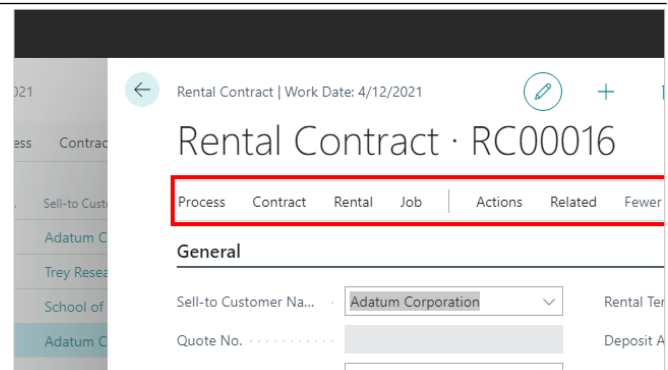
For information on the setup and processing of rentals using the Price Incl. VAT, see the ODT Rental Online Help, Rest of World Additional Rental Processes, Processing Rentals using Price Incl. VAT.

3.4.1.2. Rental Contract Command Bar

The Command Bar at the top of the Rental Contract Card provide the options for processing Rental Contracts.

Each of the available command options contain sub-menu options.

Command Bar



Process menu options

The following provides an overview of the purpose and use of the menu options in the Process option.

- **Print:** Used to print the Rental Contract document. A report request window for the document opens, where you can specify what to include on the print-out.
- **Email:** Provides the ability to email the Rental Contract.
- **Send:** Provides the ability to send the Rental Contract.
- **Transfer:** Provides the ability to transfer some or all the rental lines which have been shipped to a new contract for the same or a different customer.
- **Shortage List:** Provides the ability to print a list which reconciles the required rental quantity to the available quantity and determines if there are any shortages on any of the rental lines.
- **Resolve Shortages:** Provides the ability to resolve shortages determined by the Shortage List.
- **Print Proforma:** The Proforma Invoice is a pre-posting invoice, which displays what exactly will be invoiced for the contract based on the Cut-off Date entered on the document request page.
- **Print Pick List:** Provides the ability to print a pick list for the contract for rental lines which have not been shipped.
- **Copy Document:** Used to copy an open or completed Rental Contract or Rental Quote.

Contract menu options

The following provides an overview of the purpose and use of the menu options in the Contract option.

Rental Contract Command Bar - Contract option	
Name	Description
Customer	Provides the ability to open the Customer card directly from the Rental Contract
Dimension	Display the Dimension Code and Value which default from the Customer card

Rental menu options

The following provides an overview of the purpose and use of the menu options included in the Rental option.

Rental Contract Command Bar - Rental options	
Name	Description
Ship Rentals	Post the shipment of the rental units on the rental lines. A posted delivery document will be created that can be viewed and printed by selecting posted deliveries. A Rental Ledger Entry for each shipped unit will be created, which can be view from the Rental Lines command bar - Line option.
Ship and Send	Post the shipment of the rental units on the rental lines and sends the posted rental delivery document, when setups have been completed for sending documents.
Return Rentals	Post the return of the rental units on the rental lines. A Posted Return document will be created that can be viewed and printed by selecting posted returns. A Rental Ledger Entry for each returned unit will be created, which can be view from the Rental Lines command bar, Line option.
Return and Send	Post the return of the rental units on the rental lines and sends the posted rental return document, when setups have been completed for sending documents.
Bulk returns	The Bulk Rental Returns enables you to specify a Rental Return Date and automatically update all contract lines, Rental Return Date and Qty. to Return field, rather than having to update each line individually.
Rental Exchange	The Rental Exchange enables users to exchange multiple rental units at the same time and provides the ability to specify whether the selected unit is to be returned or not during the exchange process. Units can be returned to a different or temporary location and the replacement unit can be shipped from a different location than the initial unit.
Invoice	Finalizes the document by posting the amounts and quantities to the related accounts in your company books. In addition to the standard financial ledger entries created, Rental Value Entries are created for each rental unit invoiced. The Rental Value Entries can be viewed directly from the Rental Contract via the Rental Lines command bar - Line option.
Invoice and Print	Finalize the document by posting the amounts and quantities to the related accounts in your company books and print the invoices. In addition to the standard financial ledger entries created, Rental Value Entries are created for each rental unit invoiced. The Rental Value Entries can be viewed directly from the Rental Contract via the Rental Lines command bar - Line option.
Invoice and Send	Finalize the document by posting the amounts and quantities to the related accounts in your company books and send the posted invoice to the customer.
Posted Deliveries	View the history of posted deliveries that have been posted for the rental contract. The Posted Delivery document can be opened from the list.
Posted Returns	View the history of posted returns that have been posted for the rental contract. The Posted Rental Return document can be opened from the list.
Posted Invoices	View the history of posted sales invoices that have been posted for the rental contract. The Posted Rental Invoice document can be opened from the list.

NOTE:

There are 2 additional menu options related to the Advanced Proforma Invoice feature, Create Pro-Forma and Invoice Pro-Forma that are not displayed by default.

To learn about the Advanced Proforma Invoice feature, see ODT Rental Online Help, Additional Rental Processes, Advanced Proforma Invoice.

Job menu option

- **View Job:** Provides the ability to open the Job card when the Job No. is populated on the General tab.

Action menu options

The Action options contains the sub menu options of Process and Filter Lines.



The menu option included in the Actions - Process menu is Close Contract.

Information on options described above is not repeated here.

Ship:

- Ship Rentals
- Ship and Send

Return:

- Return Rentals
- Return and Send
- Bulk Returns
- Rental Exchange

Invoice:

- Invoice
- Invoice and Print
- Invoice and SendProforma:
- Create Pro-Forma
- Invoice Pro-Forma

Close Contract:

The close contract option provides the ability manually close a contract, when all rental lines have been fully invoiced and all rental units have been returned. In certain situations this is needed.

As the first has been fully processed previously, the contract status will not automatically be set to Completed. The Close Contract will change the status to Completed.

For example, if there are 2 rental units on the rental lines, however only 1 has been shipped, fully invoiced and returned. And the second unit, the customer decides they do not require that unit. The rental line will need to be deleted.

The following provides an overview of the purpose and use of the menu options included in the Actions - Filter Lines option.

Command Bar - Actions - Filter Lines Options	
Name	Description
Show Pending Rental Shipments	View a list of the rental lines which have not been shipped.
Show Pending Rental Returns	View a list of the rental lines which are yet to be returned.

Related menu options

The Related menu has the sub-menu options of Contract and History. The Contract menu options have been described in prior menu options.

The History menu option contains Interaction Log Entries.

The Contract menu option contains the following sub-menu options:

- Dimensions
- Comments
- Copy Document
- Transfer
- Print, for printing the contract
- Email, for emailing the contract
- Send, for sending the contract
- Print Proforma Invoice
- Print Pick List
- Shortage List
- Resolve Shortages
- View Job

A fact box is available to expand and collapse, as needed, on the Rental Contract on the Command Bar, which is located at the far right of the Command Bar.

To learn about adding links, notes and attachments, please see ODT Rental Online Help, Additional Rental Processes, Links Notes and Attachments.

3.4.1.3. Rental Contract General Fast Tab

Rental Contract General tab

General		Show more	
Sell-to Customer Name	<input type="text"/>	External Document No.	<input type="text"/>
Quote No.	<input type="text"/>	Rental Terms Code	<input type="text"/>
Posting Date	<input type="text"/>	Deposit Amount	0.00
Order Date	<input type="text"/>	Contract Total	0.00
Document Date	<input type="text"/>	Outstanding Amount	0.00

The following table provides the use and purpose of the rental related fields on the General tab.

General Tab - Rental Fields	
Name	Description
No.	The document No. is linked to the No. Series through the Rental Contract Nos. field located in Rental Management Setup. This number is automatically assigned when creating a new Rental Contract.
Quote No.	Specifies the number of the Rental Quote, if the Rental Contract was created from a Rental Quote. This field is not editable.
Rental Terms Code	If the Rental Term is entered on the Customer card, it will default to the rental header on selection of the Customer. If not specified on the Customer card, and is entered on the General Fast Tab, then the rental term will automatically populate all Rental Lines as Rental Units are entered. This will only occur when on Rental Management Setup, the field, Use Unit Rental Terms, is not checked.
Deposit Amount	Specifies the deposit amount received for the rental contract. This value is manually entered and at this time is information only.
Contract Total	Specifies the total amount of the rental contract, including both Rental and Sales.
Outstanding Amount	Specifies the outstanding amount, which is based on as contract total less any deposit received.

NOTE:

When on Rental Management Setup the field, Advanced Proforma Invoice is enabled then the field Advanced Proforma, will be displayed.

To learn about the Advanced Proforma feature, see ODT Rental Online Help, Additional Rental Processes, Advanced Proforma Invoice.

Additional fields are available to view using the Show more option on the General Tab.

- **Customer Rental Instructions**, which will display Yes in red when there are specific rental instructions for this customer. By clicking on the Yes the Customer Instructions list will be displayed. To view the details of a selected instruction, select Manage – View.
- **Salesperson Code**, which defaults from the customer card, or can be selected on the contract.
- **Rental Calendar and Customized Rental Calendar**, which are used in conjunction with Periodic Usage. To learn about the use of these fields, please see ODT Rental Online Help, Additional Rental



Processes, Periodic Usage and Standby Charges.

- **Override Insurance Verification** field provides the ability to override the settings on Rental Management related to tracking certificates of insurance.
- **Bill Until Date**, provides the ability to specify a date to bill a customer for past and future rental periods, while specifying a Posting Date to which the Ledger Entries are to be posted.
- **Original Time Zone, Current Time Zone and Time Zone Difference.** To learn about these fields, and processing across time zones, please see ODT Rental Online Help, Additional Rental Processes, Processing Rentals Across Time Zones.

Job No., which is for specifying a Job when using the Integration with Jobs feature. To learn about the Integration with Jobs feature, please see ODT Rental Online Help, Additional Rental Processes, Integration with Jobs

3.4.1.4. Shipping Tab

The shipping tab contains the information for shipping the product on the contract.

Shipment Date:

The Shipment Date is populated by default from the user's work date upon the creation of the contract. The date will default to the Shipment Date field on the rental and sales lines as product is entered.

When the date is changed on the tab, a confirmation pop-up message will occur asking if the user wants to update the lines.

When yes is selected all rental and sales lines with product will have the Shipment Date updated. When no is selected the lines are not updated, however, the Shipping tab, Shipment Date field will be updated.

Show on Map:

The Show on Map when selected will open up Bing maps to display a map showing the location of the Ship-to-Address on the Shipping tab.

Shipment Method section:

The Shipment Method section and related fields are available when Show more is selected. The information in the Code, Agent, Agent Service and Package Tracking No. fields will default from the Customer card. The fields can be overridden or can be manually entered.

The data in the Agent and Agent Service fields default to the rental and sales lines on the contract. When either of these fields is overridden after rental or sales lines have been entered a confirmation pop-up message occurs asking the user if they want to update the lines.

When yes is selected, then the respective field will be updated on the shipping tab field and the lines. When no is selected, then the lines are not updated, however, the field on the shipping tab is updated.

3.4.1.5. Invoice Details Tab

The following picture displays the Invoice Details tab.

Invoice Details		Show more	
Currency Code		Default Rental Disc. %	0
Bill-to Customer No.	10000	Rental Package Disc. %	0
Tax Liabile	<input checked="" type="checkbox"/>	FA Rental Unit Disc. %	0
Tax Area Code	ATLANTA, GA	Item Rental Unit Disc. %	0
Location Code		Resource Rental Unit Disc. %	0
Rental Line Disc. %	0	G/L Acct Rental Unit Disc. %	0

ODT Rentals provides the ability to specify rental line discount percentages, either on the Customer card, which will default to the quote or contract, or by entering the percentages directly on the quote or contract, Invoicing



Details tab.

When the discount % is entered in any of the discount fields on the Invoice Details tab, a confirmation message advising that the Line Discount field for the applicable units, groups or Rental Packages will be updated.

The following fields will default from the Customer card, if setup on the card, or can be entered directly on the Rental Contract.

Default Rental Disc %: This field is used for specifying a line discount %, which will be populate the Line Discount % field, when a unit or group cards does not have the Link Type configured, or the following line discount fields are not populated.

When any of the following Disc. % fields are populated, either by defaulting from the Customer card or entered on the Invoice Details tab, then any unit or group with the applicable Link Type will have the Line Discount % field populated with the percentage in those fields.

NOTE:

When a unit or group with the Link Type specified is a component of a Rental Package, then the Line Discount % will be populated from the Rental Default Disc. %. However, when the Pkg. Disc. %, is populated on the Invoice Details tab, then the Package Disc % will be applied to the Rental Package line and the component units and groups.

Rental Package Disc. %: Rental Package Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field. This discount will be applied to the Rental Package Line and all component lines of the package. This occurs, even when the units are linked to Fixed Asset, Item, Resources or G/L Accounts and the following Disc. % fields are populated.

FA Rental Unit Disc. %: The FA (Fixed Asset) Rental Disc. %, when specified, will default to the units and groups which have the Link Type of Fixed Asset setup on the unit cards. This applies only to those Rental Lines which are not a component line of a Rental Package. The FA Rental Unit Disc. % overwrites the Line Discount %, when populated from the Default Rental Disc % field.

Item Rental Unit Disc. %: The Item Rental Unit Disc. %, when specified, will default to the unit rental lines, for the units which have the Link Type of Item setup on the unit cards. The Item Rental Unit Disc. % overwrites the Line Discount %, when populated from the Default Rental Disc % field.

Resource Rental Unit Disc. %: The Resource Rental Unit Disc. %, when specified, will overwrite the Line Discount %, when populated from the Default Rental Disc % field.

G/L Acct. Rental Unit Disc. %: The G/L Acct. Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

In addition to the discount fields that can default from the Customer card, a field called Rental Line Disc. %, is available on the Invoice Details tab.

When this field is populated a confirmation message occurs, and if yes is selected, then the Line Discount % field on the rental lines will be populated for all rental lines on the document. This will occur even if the other percentage fields on the Invoice Details tab, have a percentage entered.

To learn about setting up Rental Line Discount percentages on a Customer card, see ODT Rental Online Help, Setup Rentals, Financials Setup for Rentals, How to Update Customer Cards for Rentals.

To learn about processing rentals using the various discount fields, see ODT Rental Online Help, Additional Rental Processes, Rental Line Discounts.

When Show more is selected, then fields related to the Billing Cycle feature are displayed.

To learn about processing rentals using the Billing Cycles feature, see ODT Rental Online Help, Processing Rentals, Rental Contracts Using Billing Cycles.

3.4.1.6. Transfer Details Tab

The Transfer Details tab contains the following fields related to the Transfer Rental Contract feature.

- Original Document
- Previous Document
- Sequence

To learn about the Transfer Rental Contract feature and the above fields, see ODT Rental Online Help, Additional Rental Processes, Transfer Rental Contracts.

3.4.1.7. Advanced Proforma Tab

The Advanced Proforma tab on the contract is only displayed when on Rental Management Setup the Advanced Pro-Forma Invoice field is enabled.

The tab contains fields related to the Advanced Proforma Invoice feature.

To learn about the Advanced Proforma Invoice feature and fields on the Advanced Proforma tab, see ODT Rental Online Help, Additional Rental Processes, Advanced Proforma Invoice.

3.4.1.8. Document Signatures

The Document Signatures tab provides the ability to capture electronic signatures on the Rental Contract.

To learn about the Electronics Signature feature, see ODT Rental Online Help, Additional Rental Processes, Electronic Signatures.

3.4.1.9. Rental Lines Command Bar

The Rental Lines command Bar provides menu options related to the lines. Each of the available command options contain sub-menu options.



Manage Menu

The following provides an overview of the purpose and use of the menu options in the Manage option.

New Line: Creates a new line.

Delete Line: Deletes the selected line. When using Rental Unit groups, the child unit lines cannot be deleted individually. The group line must be deleted, which will automatically delete the child unit lines.

Expand All: This option is for use with Rental Packages. When the package is expanded, this option is not available to select. When the package has been collapsed, then selecting Expand All will expand the package to show all the component rental lines.

Collapse All: This option is for use with Rental Packages, when entered on the rental lines. Selecting this option will collapse the package lines so that only the package line is displayed. The component lines will be hidden.

Group Avail Matrix: The Group Availability Matrix provides a quick view of the availability of a group and the rental units linked to a group. Thus facilitating the selection of the rental units on the rental quote or rental contract lines.

Rental Inventory Avail.: The Rental Inventory Availability list provides a quick view of the quantity of the rental item that is available to rent, when an item is linked to the rental unit on the quote or contract rental lines.

Availability Calendar: The Availability Calendar displays the rental availability of groups and units, excluding those linked to items in a calendar view.

The calendar also provides the ability to select child units and modify when the rental commences and the



duration of the rental.

To learn about the Availability Calendar, please see the user help, Processing Rentals - Rental Availability.

Line Menu

The following provides an overview of the purpose and use of the menu options in the Line option.

Rental Amount Lines: Provides the ability to view the rental amount line records that will be billed for the selected rental line when the invoice is posted. Rental Amount lines should be reviewed to verify that the amounts that would be billed to a customer prior to posting the shipment/delivery of the units.

For information on the Rental Amount Line fields, see the ODT Rentals Online help, Processing Rentals, Rental Quotes, Rental Quote Overview - Rental Amount Line Fields chapter.

Rental Ledger Entries: Provides the ability to view the rental ledger entries for the selected rental line. Rental ledger entries are created when the rental units are shipped and when returned.

Rental Value Entries: Provides the ability to view the rental value entries for the selected rental line. Rental value entries are created when the invoice is posted.

View Rental Calendar: This calendar is used with the Rental Custom Calendar feature, which provides the ability to specify days that are non-billable or are to be billed at a Standby Unit Price rather than the Rental Unit Price.

To learn about the Rental Custom Calendar feature, see the ODT Rental Online Help, Additional Rental Processes, Rental Custom Calendar.

Metered Usage Entries: When the rental unit card for the unit selected has Metered Usage Required enabled, then this option is available. When selected a listing of the usage tracking entries will be displayed.

To learn about Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

Periodic Usage Entries: The Periodic Usage Entries is used in conjunction with the Periodic Usage and Standby Charges pricing feature. It is used to specify which days in a rental period are to be billed using the periodic usage price and if applicable, which days are to be billed using the standby charge price.

To learn about the periodic usage and standby charges pricing feature, see ODT Rental Online help, Additional Rental Processes, Periodic Usage and Standby Charges.

Item Tracking Lines: When the rental unit card for the unit selected is linked to an item with the Tracking Code populated, then this options is available to pick the Serial Nos. and/or Lot Nos. for the rental quantity on the line.

To learn about processing rentals when the Rental Unit is linked to items with a Tracking Code, see the ODT Rental Online Help, Processing Rentals, Rental Contracts with Rental Units Linked to Items.

Additional Notes: Provides a listing of Additional Notes setup on the rental line unit selected, which can be deleted, modified or add new notes for the rental line, and specify which documents they are to print on.

To learn about Additional Notes, see ODT Rental Online help, Additional Rental Processes. Additional Notes for Rentals.

Dimensions: Displays the Dimension Codes and Values setup on the unit for the selected line.

Rental Prices: The Rental Prices option, when selected, will display all the Rental Price cards for the Rental Unit, group or Rental Package line selected.

Attachments: Display the attachments setup on a Rental Unit, which flow through to the Rental Lines, when the unit is selected on the line. Attachments can be deleted or added to the line and will flow through to the specified rental documents.



To learn about adding Attachments to Rental Lines, see ODT Rental Online Help, Processing Rentals, Links, Notes and Attachments.

Functions Menu

The following provides an overview of the purpose and use of the menu options in the Functions option.

Undo Shipments: Provides the ability to reverse the shipment of rental unit(s) as long as the unit(s) have not been invoiced. It is recommended to use the same posting date on the contract that was used when posting the shipment. A Rental Ledger entry will be created to record the transaction.

Undo Return: Provides the ability to undo the return on the selected rental unit line.

Rental Swap: The Rental Swap feature provides the function to exchange a unit out on rent for another. To learn about rental swapping, see ODT Rental Online help, Processing Rentals, Swapping Rental Units.

Create Sub Line: This function will automatically populate the Rental Unit No. field on a child line of a group, when a Sub Rental Unit is linked to the group.

Create Sub Rental PO(s): This function is used to automatically create Purchase Orders for sub-contracted product directly from the Rental Contract.

Open Sub Rental Purchase Order: This function will open the Purchase Order created for sub-rental when the Create Sub Rental Purchase Order has been ran, either from the contract or the sub rental worksheet.

To learn about sub-contracting rental units, see ODT Rental Online help, Additional Rental Processes, Sub-Contracting Rental Units.

Bulk Returns: This functionality, when ran from the Rental Line menu, provides the ability to select various rental lines for return, when not all units on the contract are being returned at once, and update the Rental Return Date, Qty. To Return, and Location when being returned to a different or temporary location.

To learn about Bulk Returns, see ODT Rental Online help, Processing Rentals, Bulk Returns.

Related Menu

The following provides an overview of the purpose and use of the menu option in the Related option.

Line Invoices: Displays a listing of invoices related to the selected rental line.

3.4.1.10. Rental Line Fields

The following provides an overview of the purpose and use of the individual fields on the Rental Contract Lines, which are displayed by default.

Rental Unit No.: The No. field provides a list of Rental Unit Groups and Rental Units to select from. When a Rental Unit Group is entered on a Rental Line, once you move off this line, then additional rental lines will be created based on the Rental Quantity entered. These child lines are for the selection of the individual units linked to the rental group.

Standard Text Code: Used to enter a Standard Text Code on a Rental Line. This field cannot be populated on a line that already has a Rental Unit No. Nor can a Rental Unit No. be entered on the line after a Standard Text Code has been entered on the line.

Description: Specifies the description of the rental unit. This can be overridden if desired.

Rental Terms Code: A value may be automatically added to this field either from the Customer Card or the Rental Unit card, if defined on the respective cards.

The term on the Rental Unit card will only default to the line if on Rental Management Setup the field, Use Unit Rental Terms, is checked. This setting takes priority over the Customer Card, Rental Term setup and the entry



of a Rental Terms Code on the rental header.

If the field is blank, or you wish to change the defaulted rental term, drill-down to select the appropriate code to complete the transaction. You can also change it to another value if a Rental Terms Code is present. This new code, however, will only be used on the current document.

Rental Quantity: Specifies the number of rental units to be rented.

Location Code: Specifies the rental location of the rental unit. The location is mandatory, when on Rental Management Setup, the Location Mandatory field has been checked. The location specified on the group line defaults to the child lines and will filter the list of units available to the location specified on the group rental line.

For units not linked to a group or entry of a group unit only the location specified on the rental unit card will default to the rental line.

Rental Terms Code Alt2: Specifies a rental term code that will be used in the optimized pricing calculation when the return date of the rental is either greater than or less than the period code specified on the rental term. The Rental Term Alt2 Code defaults from the Rental Term Code entered here if setup on the term when the term is enter on the line.

Rental Terms Code Alt1: Specifies a rental term code that is used in the optimized pricing calculation when the return date of the rental is either greater than or less than the period code specified on the rental term. The Rental Term Alt1 Code defaults from the Rental Term Code entered here if setup on the term when the term is enter on the line.

Rental Start Date: Specifies the date on which the rental will commence. This date is included in the pricing calculation. By default, this date matches Order Date on the General fast tab. You can change this date to when the rental is to begin, if the rental is to start at a different date.

No. of Periods: Provides the ability to enter the number of periods the rental is for, which updates the rental return date using the selected rental term multiplied by the no. of periods.

Rental Return Date: The Rental Terms Code specified will automatically populate the Rental Return Date based on the Rental Start Date and the assigned rental period length for the default Rental Terms Code on the line. This date can be modified to specify the expected return date of the rental.

In the event of an unknown return date, then the Rental Return Date field can be cleared and entered when the unit is returned or an expected return date is known.

Rental Unit Price: Specifies the rental price for the rental unit for a single rental period. This price defaults from the Rental Price setup for the Rental Term setup on the Rental Unit or unit group. The price can be overridden directly on the line, if needed.

Should the Rental Term entered on the line not be setup in Rental Prices on the Rental Unit or group, then the price can be entered directly on the rental line.

Alt1 Rental Unit Price: Specifies the rental price for the rental unit for a single rental period for the Rental Terms Code Alt1, when defaulted to or entered on the Rental Line.

Alt2 Rental Unit Price: Specifies the rental price for the rental unit for a single rental period for the Rental Terms Code Alt2, when defaulted to or entered on the Rental Line.

Currency Code: Specifies the Currency Code, which defaults from the Invoice Details tab, Currency Code. The Currency Code on the Invoice Details tab defaults from the Customer card.

Tax Group Code: Defaults the Tax Group Code from the rental price card setup for the rental term on the rental unit group, rental unit or the rental package, if setup. When rental price cards not be setup on the rental unit group or rental unit, then the Tax Group Code will default from the rental unit card.

Qty. To Rent: Specifies the number of rental units to be rented. The number defaults from the Rental Quantity field on the line.



Qty. on Rent: Specifies the number of rental units shipped and currently are out on rent to the customer.

Qty. to Return: Specifies the number of rental units to be returned. This field must be populated in order to post the return of the rental units.

Qty. Returned: Specifies the number of rental units which have been returned.

Line Discount %: Specifies the line discount percentage that is valid for the rental unit quantity on the line. If left blank, no reduction will occur.

Should Damage Waivers or the Additional Fee be included on the Rental Price with the Damage Waiver/Additional Fee Allow Line Disc checked, then the Line Discount % will also be applied to their Unit Price.

Should Metered Usage be included on the Rental Price card with the Metered Usage Allow Line Disc checked, then the Line Discount % will also be applied to the Metered Usage Unit Prices.

Partial Return Date: This field is used as the posting date when partial returns are processed for a rental line. The date in the field defaults from the current posting date on the contract and can be overridden to specify a different date to be used as the posting date of the partial return.

Return Day Billable: Specifies whether the day the rental unit is returned will be billable to the customer. This field is automatically populated based on the setting on Rental Management Setup for this field, however, can be modified if needed.

Global Dimension 1 and 2 fields are displayed by default, and can be edited on the rental lines.

3.4.1.11. Additional Rental Line Fields

There are additional fields available to add to the rental line using the setting called Personalize.

Should your organization track rentals based on date and time where billing is based on a starting time and return time in addition to date, then the fields Rental Start Time and Rental End Time will need to be added to the rental lines.

Should your organization have personnel who "pick" the units to be shipped, then there are two additional fields that will need to be added to the rental lines, Required Shipping Date and Customer Pickup.

The steps for adding additional fields are outlined in the How to Add Fields to Rental Lines chapter.

If tracking rentals by date and time, where time is a factor, you can specify the actual expected times for renting and billing to commence and end as well. The Rental Start Time and Rental Return Time fields are used when tracking rentals based on the time out/time in.

These fields are not automatically displayed on the Rental Line and if needed, will require adding the fields by using the Personalize feature as outlined in the Rental Quote Overview.

The following provides an overview of the purpose and use of the individual fields that can be added to the Rental Contract Lines.

Line No.: Displays the line number of the rental line.

Tax Area Code: Displays the Tax Area Code, which defaults from the Invoicing Details tab and can be modified.

Tax Prod. Posting Group: Specifies the VAT product posting group and is only available on the Global (Rest of World) version.

Shipping Agent Code: Specifies the shipping agent which is to be used to transport the rental units to the



customer. When a customer card has the Shipping Agent Code setup, it will default to the rental document, Shipping tab. Then when the rental lines or sales lines are entered, the code will default to the lines. The code in the field on the line can be overwritten.

Shipping Agent Service Code: Specifies the service option of the shipping agent which is to be used to transport the rental units to the customer. When a customer card has the Shipping Agent Service Code setup, it will default to the rental document, Shipping tab.

Then when the rental lines or sales lines are entered, the code will default to the lines. The code in the field on the line can be overwritten.

Rental Start Date-Time: Displays the combination of the Rental Start Date and Rental Start Time fields.

Rental End Date-Time: Displays the combination of the Rental End Date and Rental End Time fields.

Rental Billing Start Date-Time: Displays the combination of the Rental Billing Start Date and Rental Billing Start Time fields.

Rental Billing End Date-Time: Displays the combination of the Rental Billing End Date and Rental Billing End Time fields.

Rental Return Date-Time: Displays the combination of the Rental Return Date and the Rental Return Time fields.

Rental Start Time: Specifies the time at which the rental will commence. The time is defaulted to the time field when the rental line is created.

The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time.

When the field has Track Date Only, then the time will default to 12:00:00 AM and the field cannot not be edited. When the field has Track Date and Time, then the time will default to the time at which the rental line is created and can be edited.

Rental Return Time: Specifies the time at which the rental unit is expected to be returned.

The Rental Terms Code specified will automatically populate the Rental Return Time based on the Rental Start Date, Rental Start Time and the assigned rental period for the default Rental Terms Code on the line.

The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time.

When the field has Track Date Only the time will default to 11:59:59 PM and the field cannot be edited.

When the field has Track Date and Time, then the time will default the time based on the lapsed time less one second from the Rental Start Time. The length of time is based on the Rental Period Code setup on the Rental Term. The field can be edited.

Rental Billing Start Date: Specifies the date on which the rental billing will commence. As the billing usually commences at the time of the rental this date is defaulted to the same date as the Rental Start Date. This date can be overridden should the billing to commence at a different date than the rental.

Rental Billing End Date: Specifies the date on which the rental billing will finish. This date can be overridden should the billing to end at a different date than the rental.

Rental Billing Start Time: Specifies the time at which the rental billing will commence.

The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time.

When the field has Track Date Only, the time will default to 12:00 AM and the field cannot be edited.



When the field has Track Date and Time, the time will default to the time at which the rental line is created and can be edited.

Rental Billing End Time: Specifies the time at which the rental billing will finish.

The time that defaults to this field is dependent on whether the rental term field, Rental Date Time Tracking, has Track Date Only or has Track Date and Time.

When the field has Track Date Only, the time will default to 11:59:59 PM and the field cannot be edited.

When the field has Track Date and Time, then the time will default the time based on the lapsed time less one second from the Rental Billing Start Time. The length of time is based on the Rental Period Code specified on the Rental Term Card. The time can be overridden, if desired.

Sub Rental: When the unit entered on the Rental Line has the Sub Rental field set to Yes, then this field will be automatically checked to display the unit is a Sub Rental unit.

Sub Rental Purch. Order No.: This field is for use only on Rental Contracts. On the contract, this field will display the Purchase Order No of the sub contracted product when the Create Sub Rental Purchase Order is ran either from the contract or from the Sub Rental Worksheet.

Cust. Declines Damage Waiver: When the rental price card has Damage Waiver pricing enabled and this field is checked, then the Damage Waiver fee will not be billed to the customer.

Customer Pickup: Specifies whether the customer will pick-up the unit. This feature is used in the Global Pending Shipments functionality. The population of this field is not mandatory on a quote. However, if the company is using the Global Pending Shipments functionality, it is recommended that if the customer is to pick-up the unit, that this field be checked on the rental Line.

Required Shipping Date: Specifies the date the customer requires the unit be shipped. This field is used in the Global Pending Shipments functionality. The population of this field is mandatory as the date is used in the Starting Date-Time field on the Reservation Entry.

If the company is using the Global Pending Shipments functionality for "picking" the units, then this will be required on the Rental Contract once the quote is converted to a contract.

ODT Transfer Order No.: Displays the Transfer Order No. that was created and posted when a rental line with a unit linked to an Item has the Commit Reservation checked.

Vendor No.: This field is for use only on Rental Contracts. On the contract, this field must be populated for Sub Rental Units prior to running the Create Sub Rental Purchase Order from the contract.

Vendor Name: Displays the name of the Vendor when the Vendor No. field is populated.

Sub Rental Description: This field is for use only on the Rental Contracts. On the contract, this field must be populated for Sub Rental Units prior to running the Create Sub Rental Purchase Order from the contract.

Package Line Amount Excl. Tax: This field is for when Rental Packages are used. On the rental line on which a Rental Package has been selected, this field displays the price setup on the package for the rental term selected on the line.

For the rental lines having the components of the rental packages, this field displays the calculated rental unit price for rental unit groups and units in the package. This is the unit price that will be allocated to the units in the package based on the package price.

To learn about Rental Packages, see ODT Rental Online Help, Processing Rentals, Additional Rental Processes, Rental Packages.

Shipment Date: Specifies the Shipment Date. This date defaults from the Shipping tab and can be overridden to specify the date the shipment occurred on or is to occur on.



Shipment Time: Specifies the Shipment Time. The purpose of this field is to enable companies that are tracking rentals on both date and time, to enter the actual time of shipment, either on the rental line or in the To Ship cue list.

When the setting is Tracking Date Only, then the time will be set to 12:00:00 AM and cannot be edited.

When the setting is Tracking Date and Time, then the time will be set to the current system time and can be overridden to enter the actual shipment time.

The time that defaults to this field is dependent upon the Tracking Date Time field setting, on the Rental Term that is selected on the Rental Line.

Shipment Date-Time: Specifies the Shipment Date and Time and is the combination of Shipment Date and Shipment Time. This field is informational only, and cannot be edited. The field is automatically updated when either the Shipment Date or Shipment Time is modified.

Metered Usage Enabled: Displays whether the unit on the rental line requires metered usage entry. This setting defaults from the rental unit card field, Metered Usage Enabled and cannot be modified.
Usage Unit of Measure: Displays the unit of measure which will be used for tracking the metered usage on the unit. The UOM defaults from the rental unit price card and cannot be modified.

Metered Usage Tax Group Code: Defaults the Metered Usage Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit and can be modified.

Metered Usage Base Price: Displays the base price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified.

Metered Usage Level 1 End Qty.: Displays the end quantity for the metered usage base unit price that is specified on the Rental Unit price card, for the Rental Term on the line. This field cannot be modified.

Metered Usage Level 2 Unit Price: Displays the Level 2 unit price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified when the Metered Usage Levels field on the price card is set to 2 Levels.

Metered Usage Level 2 End Qty.: Displays the end quantity for the metered usage level 2 unit price that is specified on the Rental Unit price card, for the Rental Term on the line. This field cannot be modified.

Metered Usage Level 3 Unit Price: Displays the Level 2 unit price for metered usage that is specified on the Rental Unit price card, for the Rental Term on the line. This price field can be modified when the Metered Usage Levels field on the price card is set to 3 Levels.

Current Meter Reading: Displays the current meter reading of the unit when metered usage, if applicable to the unit entered on the line. This value defaults from the Rental Usage Tracking Entries for the unit.

Metered Usage Qty.: Displays the total metered usage quantity. The amount will be a calculated amount when a Current Meter Reading is entered, which is different than the Previous Meter Reading, or is entered on the contract rental line. This field cannot be edited on a rental quote.

Billable Metered Usage Qty.: Displays the total billable metered usage qty., which defaults from the Metered Usage Qty. field and can be overridden on the Rental Contract line. The quantity in this field is only populated when the entry type is metered usage and is used for billing the customer. This field is not used on rental quotes..

To learn about Metered Usage, see the ODT Rental Online help, Additional Rental Processes, Metered Usage.

Allow Zero Usage: This field is used to specify that an invoice can be posted when the latest meter reading or metered usage qty. or periodic usage has not been entered.

Periodic Usage Enabled: Displays whether the unit on the rental line requires periodic usage entry. This setting defaults from the rental unit or unit group field, Periodic Usage Enabled



Periodic Usage Billing: Displays whether Periodic Usage and Standby Charges are activated on the Rental Price card for the Rental Term when a price card is setup.

When a Rental Price card does not exist for the Rental Term on the Rental Line, but the unit does have the Periodic Usage Enabled field activated, then this field can be checked. This will then enable the user to enter a Periodic Usage Unit Price and Standby Unit Price, if applicable, so that Periodic Usage and Standby Charges can be billed to the customer.

Periodic Usage Period Usage UOM: Displays the Unit of Measure of DAY and cannot be edited as periodic usage and standby pricing is based on a daily price.

Use Roll-up Pricing: Specifies whether the package is using Roll-up Pricing.

Periodic Usage Unit Price: Displays the Periodic Usage Unit Price from the price card, when configured for the rental term on the line and the Periodic Usage Enabled field is enabled. If there is no rental price card for the rental term on the line, then the Periodic Usage Price can be entered directly on the rental line, as long as Periodic Usage Enabled field on the rental unit and rental line is checked.

Periodic Usage Tax Group Code: Defaults the Periodic Usage Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit, if setup. When rental price cards are not setup, then the Periodic Usage Tax Group Code can be selected when using line pricing.

Standby Billing: Displays as checked when Standby Usage Billing is enabled on a Rental Price card for the rental unit and the rental term on the line. The field can be checked if the rental term on the line does not have a price card, when the Periodic Usage Enabled field is checked.

Standby Unit Price: Displays the Standby Unit Price from the price card, when configured for the rental term on the line. If there is no rental price card for the rental term, then the Standby Unit Price can be entered directly on the rental line, as long as the Periodic Usage Enabled field on the rental unit and rental line is checked.

Standby Tax Group Code: Defaults the Standby Tax Group Code from the rental price card setup for the rental term on the rental unit group or rental unit, if setup. When rental price cards are not setup, then the Standby Tax Group Code can be selected when using line pricing.

For information on Periodic Usage and Standby Charges, see the ODT Rental Online help, Additional Rental Processes, Periodic Usage and Standby Charges.

Bin Code: When the rental unit on the line is linked to an Item that is stored in bins, then the default Bin Code will populate this field and can be modified.

Return Bin Code: This field is for use only on the Rental Contract to specify a Bin Code the item linked to the Rental Unit is to be returned to, when the bin is a different bin, than it was shipped from.

Return Location Code: This field is for use only on the Rental Contract to specify a rental location the Rental Unit is to be returned to, when the Location is a different rental Location, than it was shipped from. The location can be a different rental location that the unit was shipped from or a temporary location, such as a service location or an interim location the unit might be stored at.

Return Temporary Location: This field is used to describe the temporary location the unit is to be returned to, when a temporary location is selected in the Return Location Code field. When a temporary location is selected in the Return Location Code field, then the entry of a description in this field is mandatory.

Serial No.: Displays the Serial No. when specified on the Rental Unit card.

Job. No., Job. Task No. and Job Planning Line No.: These fields are utilized with the Integration with Jobs feature. For information on the use of these fields, see ODT Rental Online help, Additional Rental Processes, Integration with Jobs.

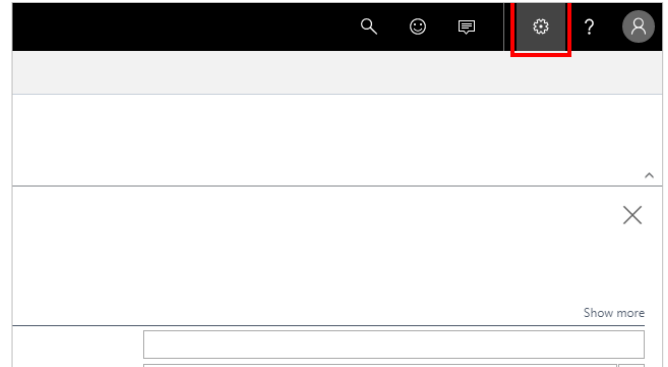
Transferred From Doc. No., Transferred Date, Transferred and Transferred to Doc. No.: These fields are utilized in the Transfer Rental Contracts feature. For information on the use of these fields, see ODT Rental

Online help, Additional Rental Processes, Transfer Rental Contracts.

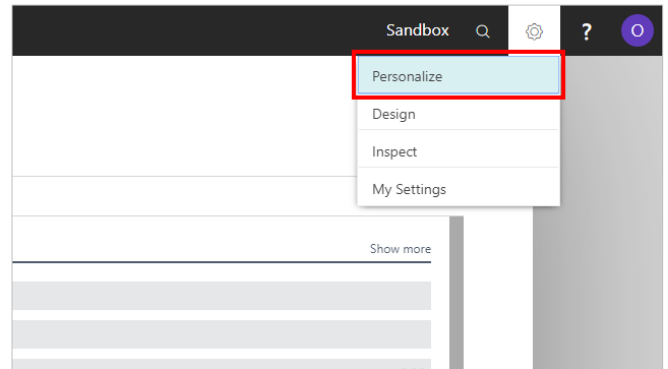
3.4.1.12. How to Add Fields to the Rental Lines

The following steps demonstrate how to add fields to Rental Lines.

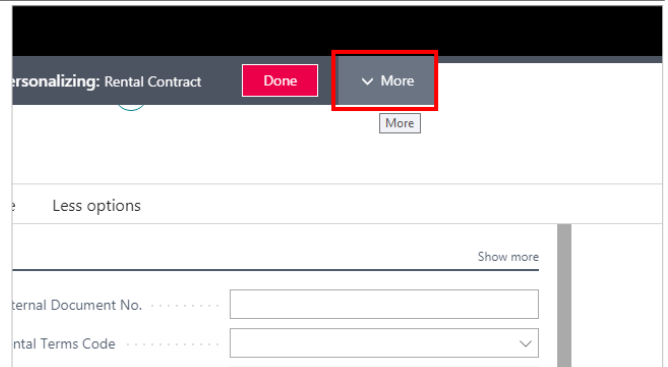
Click on the navigation menu item popup **Settings**



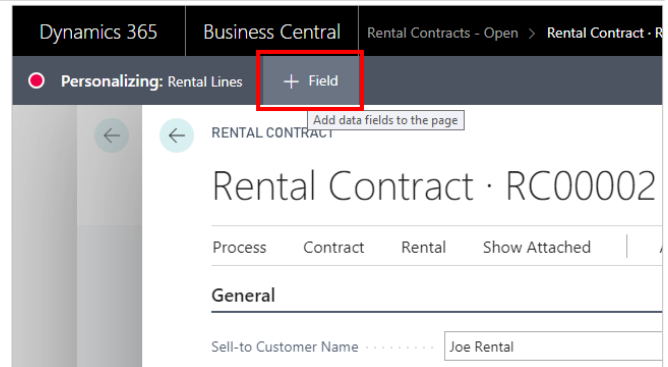
Click on the menu item **Personalize**



Click on the link **More**

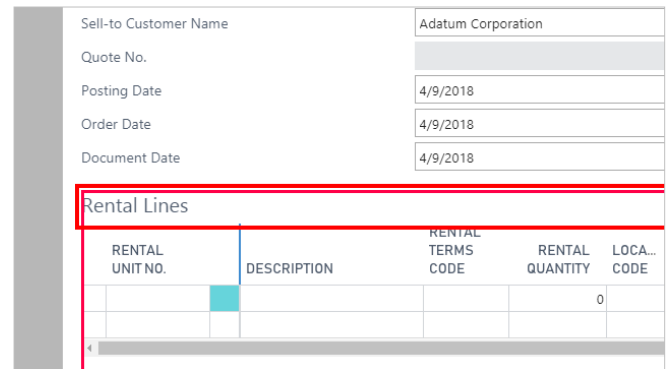


Click on the link **Field**



Click on the label **Rental Lines**

A listing of available fields will be displayed at the right.



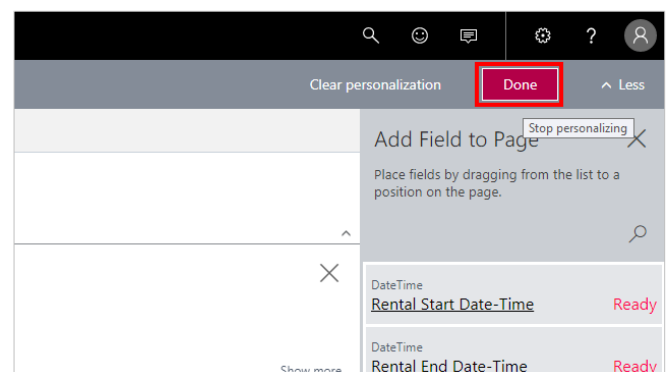
Left Click on the field to add to the Rentals Lines and drag it to the location on the Rental Line where you want the field to be displayed.

A thick red line shows up on the rental lines when dragging the field over, which indicates where the field is to be dropped.

Click on the link **Done**

When all desired fields have been added click on the Done button at the top as indicated in the screen shot provided.

Then close and re-open the contract.



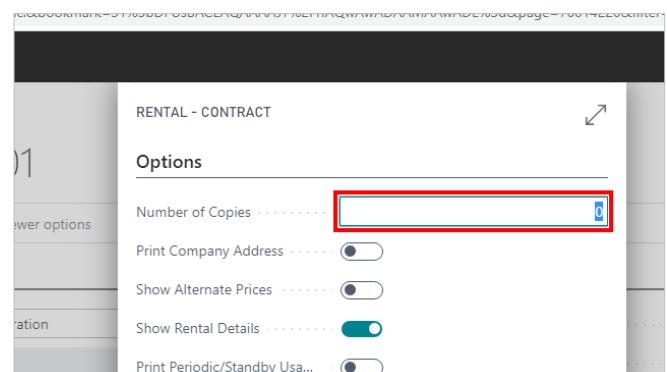
3.4.1.13. Printing Options for Rental Contracts

The following provides information on the Option tab fields, when printing the Rental Contract.

Click on the field **Number of Copies**

The No. of Copies field displays 0, which means 1 copy will be printed.

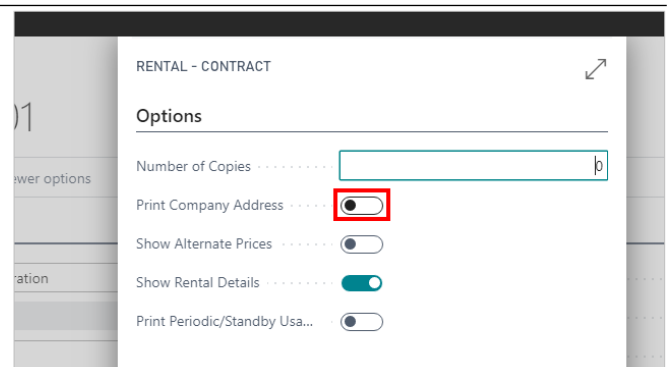
Should 2 copies be needed, then enter 1 in this field.



Click on the toggle field **Print Company Address**

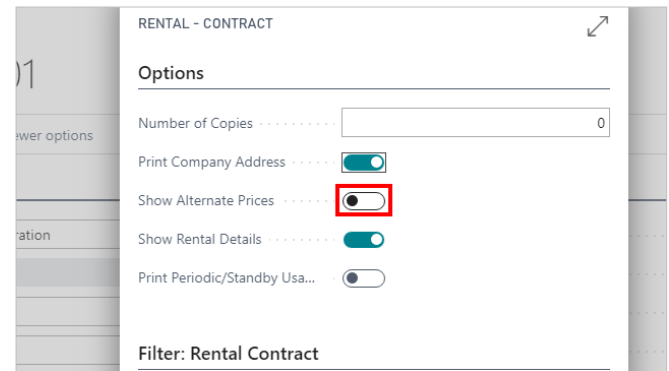
If the Company Address is to print on the contract document and the field is set to No, then click on the field to change the setting to Yes.

If the Company Address is not to print on the contract document and the field is set to Yes, then to set it to No click on the field.



Click on the toggle field Show Alternate Prices

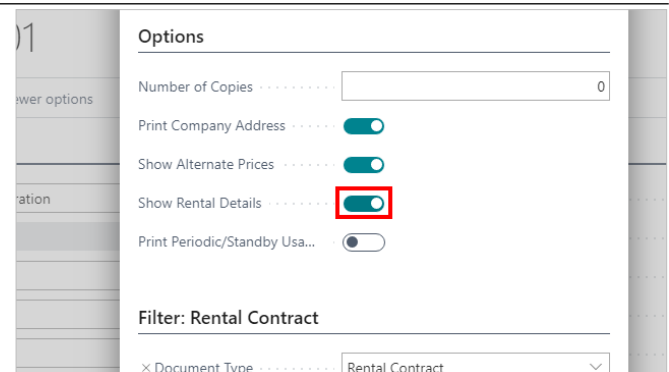
When checked, the Alt1 and Alt 2 Rental Terms Codes and Prices will print on the Rental Contract document.



Click on the toggle field Show Rental Details

By Default the Show Rental Details field is enabled. When enabled, then additional charges such as Damage Waivers will print, and if there are additional notes attached to units, the notes will print on the document.

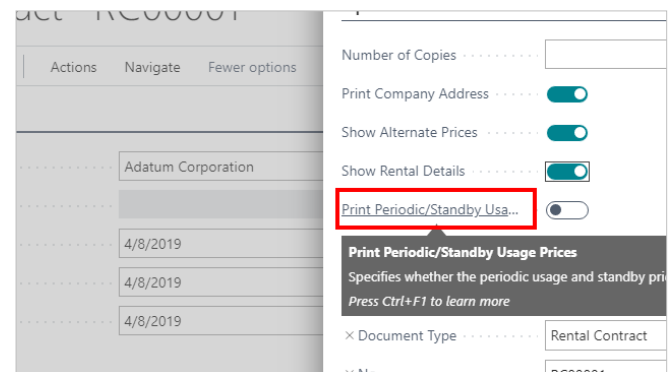
When the Show Rental Details field is disabled, then the above do not print on the document.



Should there be a rental package on the rental lines, then the component groups and units in the package will print on the document.

Click on the link **Print Periodic/Standby Usage Prices**

This option is only for use when the units on the rental lines have the Periodic Usage Enabled field enabled.

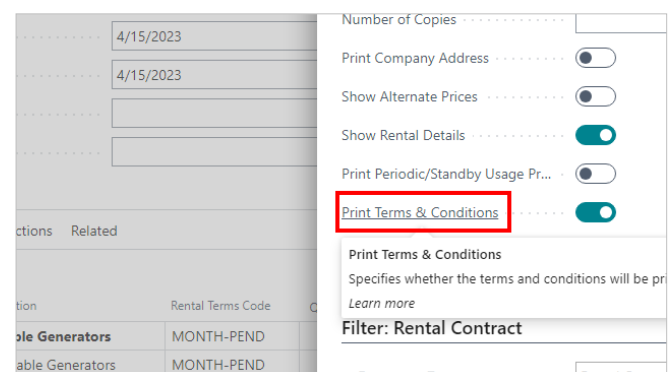


The setting selected on the Print Periodic/Standby Usage Prices field when printing the contract, overrides the setting on Rental Management Setup.

When the Print Periodic/Standby Usage Prices field is enabled, then when a unit on the rental lines has periodic/standby pricing configured on the rental price cards, the prices will print on the document. When disabled, then the prices will not print.

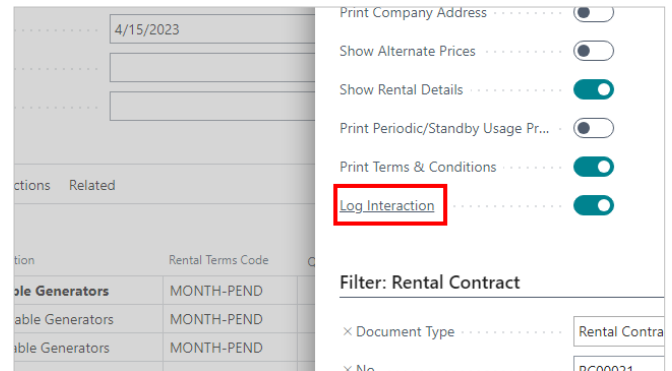
Click on the link **Print Terms & Conditions**

The field is automatically enabled when the Terms & Conditions field on Rental Management is enabled. The Terms & Conditions file will print after the contract when printed. The field must be enabled for the file to be attached when email or send the contract.



Click on the link **Log Interaction**

The field can only be enabled when the Interaction Logging is configured for Rentals.



The screenshot shows a sidebar with various toggle switches. The 'Log Interaction' toggle is highlighted with a red box. Other visible toggles include 'Print Company Address', 'Show Alternate Prices', 'Show Rental Details', 'Print Periodic/Standby Usage Pr...', 'Print Terms & Conditions', and 'Log Interaction'. Below the toggles, there is a 'Filter: Rental Contract' section with a dropdown menu for 'Document Type' set to 'Rental Contra' and a 'No.' field with the value 'RC00021'.

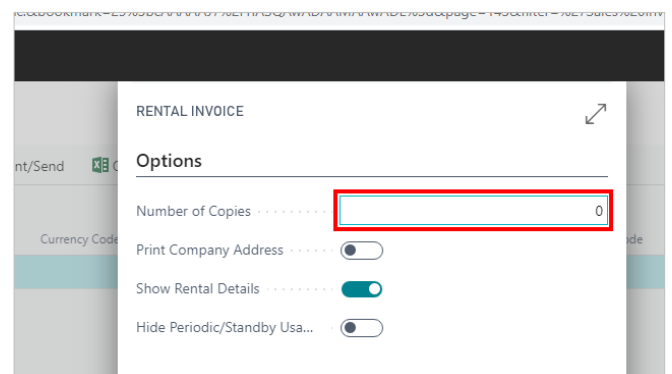
3.4.1.14. Printing Options for the Proforma Invoice

The following provides information on the Option tab fields, when printing the Proforma Invoice.

Click on the field **Number of Copies**

The No. of Copies field displays 0, which means 1 copy will be printed.

Should 2 copies be needed, then enter 1 in this field.

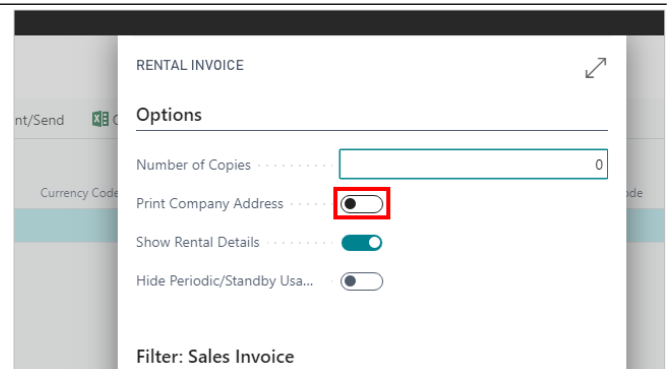


The screenshot shows the 'RENTAL INVOICE' Options tab. The 'Number of Copies' field is highlighted with a red box and displays the value '0'. Other visible fields include 'Print Company Address' (toggle), 'Show Rental Details' (toggle), and 'Hide Periodic/Standby Usa...' (toggle). The filter is set to 'Sales Invoice'.

Click on the toggle field **Print Company Address**

If the Company Address is to print on the contract document and the field is set to No, then click on the field to change the setting to Yes.

If the Company Address is not to print on the contract document and the field is set to Yes, then to set it to No click on the field.

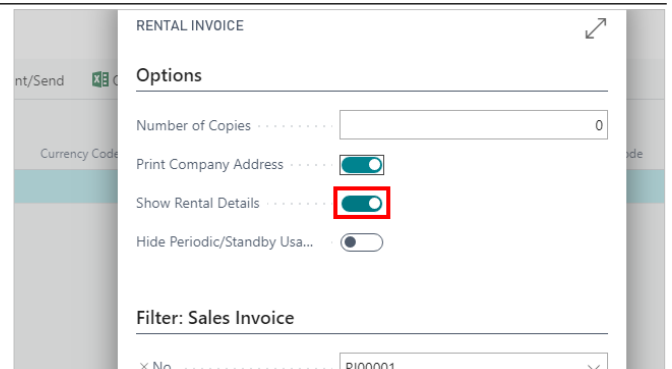


The screenshot shows the 'RENTAL INVOICE' Options tab. The 'Print Company Address' toggle switch is highlighted with a red box. The 'Number of Copies' field displays '0'. Other visible fields include 'Show Rental Details' (toggle) and 'Hide Periodic/Standby Usa...' (toggle). The filter is set to 'Sales Invoice'.

Click on the toggle field **Show Rental Details**

By Default the Show Rental Details field is enabled. When enabled, then additional charges such as Damage Waivers will print, and if there are additional notes attached to units, the notes will print on the document.

When the Show Rental Details field is disabled, then the above do not print on the document.

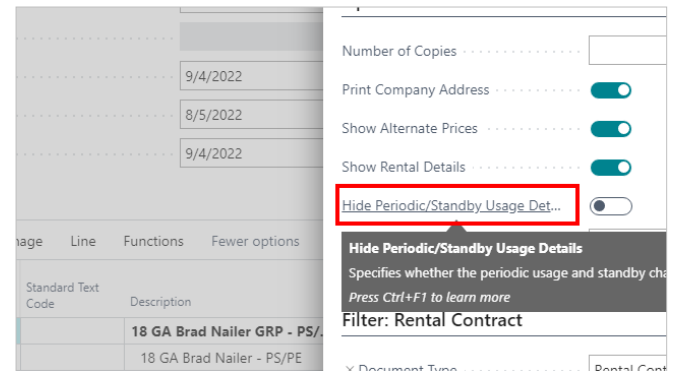


The screenshot shows the 'RENTAL INVOICE' Options tab. The 'Show Rental Details' toggle switch is highlighted with a red box. The 'Number of Copies' field displays '0'. Other visible fields include 'Print Company Address' (toggle) and 'Hide Periodic/Standby Usa...' (toggle). The filter is set to 'Sales Invoice'.

Should there be a rental package on the rental lines, then the component groups and units in the package will print on the document.

Click on the link **Hide Periodic/Standby Usage Details**

This option is only for use when the units on the rental lines have the Periodic Usage Enabled field enabled.



The screenshot shows the 'Hide Periodic/Standby Usage Details' field in the Proforma printing options menu. The field is currently disabled (toggle is off). A tooltip is visible, stating: 'Hide Periodic/Standby Usage Details Specifies whether the periodic usage and standby charges are printed on the proforma invoice. Press Ctrl+F1 to learn more'. The filter is set to 'Rental Contract'.

The setting selected on the Hide Periodic/Standby Usage Details field when printing the Proforma, overrides the setting on Rental Management Setup.

When the Hide Periodic/Standby Usage Details field is not enabled, then when a unit on the rental lines has periodic/standby usage to be invoiced, then the billing will be print a line for each day being invoiced.

When the field is enabled, then the billing will print summarized, with a single line for periodic usage and a single line for standby charges.

Example of summarized printing:

Periodic Usage

Days in Use Apr 25, 2019 to May 24, 2019

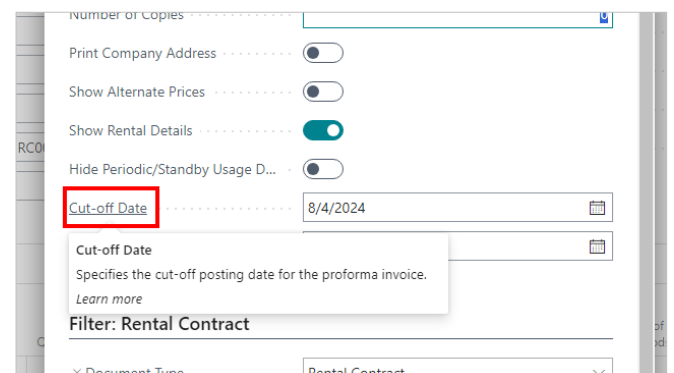
Days on Standby Apr 25, 2019 to May 14, 2019

27@ 500.00/DAY = 13,500.00

3@ 200.00/DAY = 600.00

Click on the link **Cut-off Date**

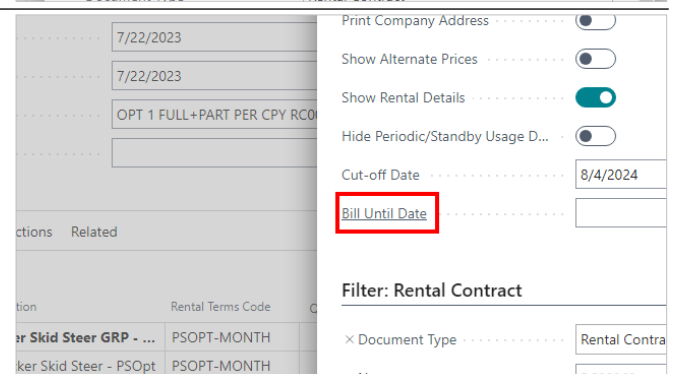
The Cut-off Date is to be the planned invoice posting date and is used to determine which Rental Amount Lines are to be billed when the Bill Until Date field is blank. All non-invoiced lines with a Billing Date up to and including the Cut-off Date will be billed.



The screenshot shows the 'Cut-off Date' field in the Proforma printing options menu. The field is currently set to 8/4/2024. A tooltip is visible, stating: 'Cut-off Date Specifies the cut-off posting date for the proforma invoice. Learn more'. The filter is set to 'Rental Contract'.

Click on the link **Bill Until Date**

When Bill Until Date is populated, then the date specified in the Bill Until Date field is used to determine which Rental Amount Lines are to be billed. However, the Posting Date for the invoice will be set to the Cut-off Date.



The screenshot shows the 'Bill Until Date' field in the Proforma printing options menu. The field is currently blank. A tooltip is visible, stating: 'Bill Until Date Specifies the date until which rental lines are billed. Learn more'. The filter is set to 'Rental Contract'.

3.4.1.15.

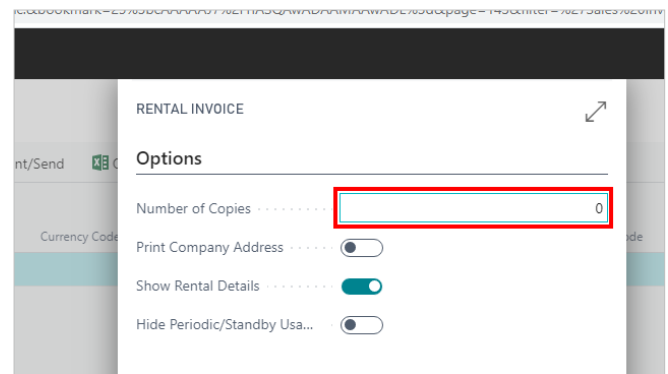
Printing Options for Printing the Posted Rental Invoice

The following provides information on the Option tab fields, when printing the Posted Rental Invoice.

Click on the field **Number of Copies**

The No. of Copies field displays 0, which means 1 copy will be printed.

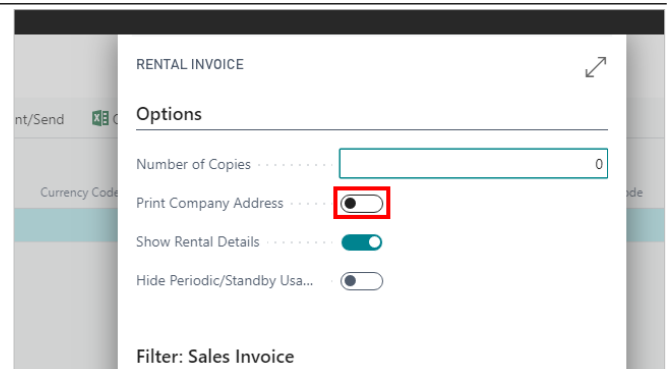
Should 2 copies be needed, then enter 1 in this field.



Click on the toggle field **Print Company Address**

If the Company Address is to print on the contract document and the field is set to No, then click on the field to change the setting to Yes.

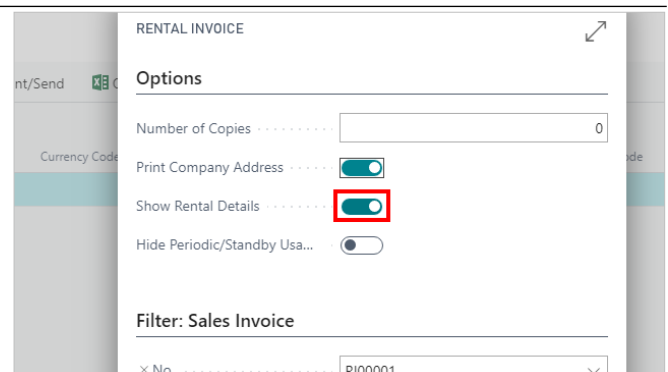
If the Company Address is not to print on the contract document and the field is set to Yes, then to set it to No click on the field.



Click on the toggle field **Show Rental Details**

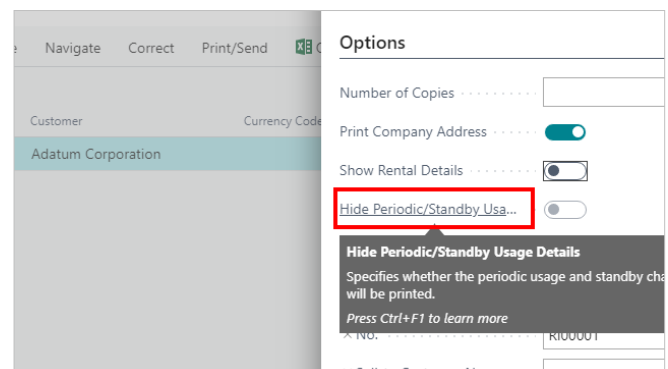
By Default the Show Rental Details field is enabled. When enabled, then additional charges such as Damage Waivers will print, and if there are additional notes attached to units, the notes will print on the document.

When the Show Rental Details field is disabled, then the above do not print on the document.



Should there be a rental package on the rental lines, then the component groups and units in the package will print on the document.

Click on the link **Hide Periodic/Standby Usage Details**



The setting selected on the Hide Periodic/Standby Usage Details field when printing the Proforma, overrides the setting on Rental Management Setup.

When the Hide Periodic/Standby Usage Details field is not enabled, then when a unit on the rental lines has periodic/standby usage to be invoiced, then the billing will be print a line for each day being invoiced.

When the field is enabled, then the billing will print summarized, with a single line for periodic usage and a single line for standby charges.



Example of summarized printing:

Periodic Usage

Days in Use	Apr 25, 2019 to May 24, 2019	27@ 500.00/DAY = 13,500.00
Days on Standby	Apr 25, 2019 to May 14, 2019	3@ 200.00/DAY = 600.00

3.4.2. How to Process Contracts for Billing at Start of the Contract

Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

The following example demonstrates the creation and processing of a contract, for the pricing schema where the customer is billed for the full contract, at the beginning of the contract.

3.4.2.1. Creating a new Rental Contract for Billing at the Start of the Contract

Click on the navigation menu item **Rental Contract**

Click on the field **Sell-to Customer Name**

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Select the Customer which the Rental Contract is for.



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Click on the field **External Document No.**

If the customer has provided an external document number, then click on the field External Document No. field and enter it.

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

Click on the link

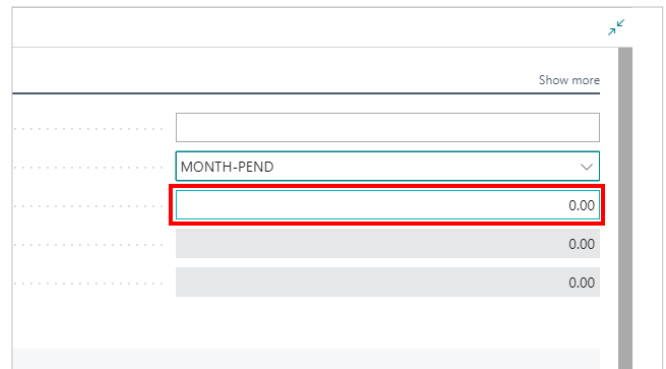
Click on **Code = MONTH-START, Description = Monthly Rental for Billing at Start of Contract**

Visit Amount	CODE		DESCRIPTION						
Contract Total	MONTH-END-OPT-...		Monthly Rental for C						
Standing Amount	MONTH-PEND		:	Monthly Rental - Per					
	MONTH-PEND-EARLY		:	Monthly Rental - Ear					
	MONTH-PSTART		:	Monthly Rental - Per					
	MONTH-PSTART-EA...		:	Monthly Rental - Ear					
	MONTH-START		:	Monthly Rental for B					
L	RENTAL	RENTAL	REN	+ new	Select record "MONTH-START"				
ALT1	TERMS	START	RETURN	RENTAL	ALT1	RENTAL	ALT2	RENTAL	
	CODE	DATE	DATE	UNIT	PRICE	UNIT	PRICE	UNIT	PRICE
					0.00		0.00		0.00

Click on the field **Deposit Amount**

If a deposit is required, enter the amount.
Otherwise, leave this field blank.

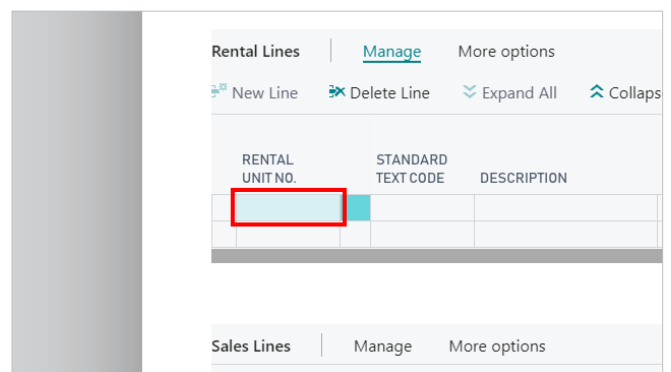
If a deposit is entered, then once the Rental Lines and if applicable, the Sales Lines are completed, the Contract Total and Outstanding Amount fields will automatically be updated.
Once the Rental Lines and if applicable, the Sales Lines, are completed the Contract Total and Outstanding Amount fields will automatically be updated.



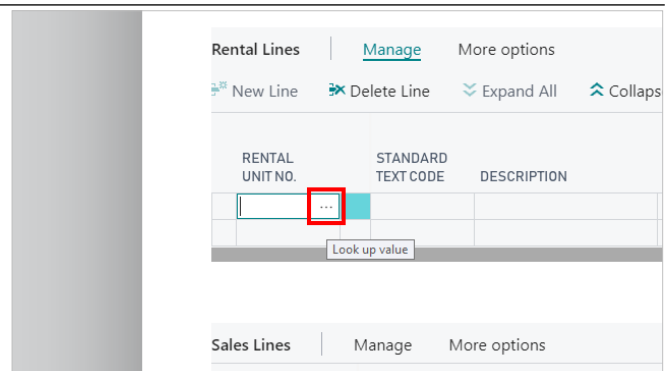
3.4.2.2.

Entering a Rental Unit Group on the Rental Lines

Click on the cell **Rental Unit No.**




Click on the lookup button in the cell **Rental Unit No.**
lookup button



Click on the cell **No.** with the value **RU00001**

Click on the Rental Unit Group to be added to the Rental Line.



Click on the cell **Rental Terms Code**

The Rental Term Code field may be automatically populated depending on the setups selected on Rental Management Setup, Rental Units and the Customer.

If the Rental Term Code field is either blank or contains a rental term that is not the desired term, then you can select the term that is applicable to this rental.

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Click on the link in cell **Rental Terms Code**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-P	0	

Click on **Code = MONTH-START, Description = Monthly Rental for Billing at Start of Contract**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	TERMS CODE A
	Buckeye Ditcher Group	MONTH-PI	0		

CODE	DESCRIPTION
MONTH-PSTART	Monthly Rental - Per
MONTH-PSTART-EA...	Monthly Rental - Ear
MONTH-START	Monthly Rental for B
WEEK-END-OPT	Weekly Rental for O
WEEK-END-OPT-TIME	Weekly Rental for O

To review the rental group availability, complete the following steps.

CRITICAL:

The user must move off the Rental Unit No. field prior to reviewing the Group Availability Matrix.

Should this step be missed, this could lead to the contract not being able to be closed as Rental Amount Lines will be created on the group line and these cannot be deleted or invoiced.

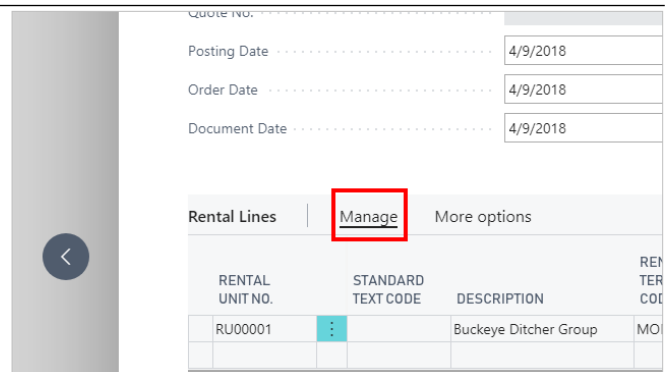
The only way to address this item is to delete the group and linked child lines and re-enter them, which would have to be done prior an invoice is posted. Once an invoice is posted, then although the child lines are fully invoiced and the units have been returned, the contract will not close.

If the units have been shipped, however not invoiced, then the Function, Undo Shipment must be ran on each child unit line.

Then the Rental Unit Group line must be deleted, which will delete the child unit lines.

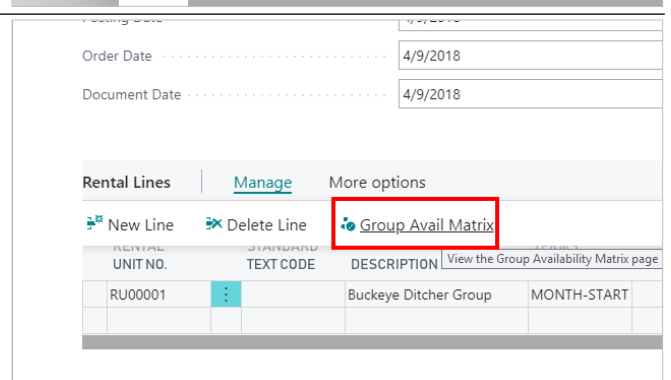
After that the group must be re-entered and the units shipped, prior to invoicing.

Click on the navigation menu item popup **Manage**

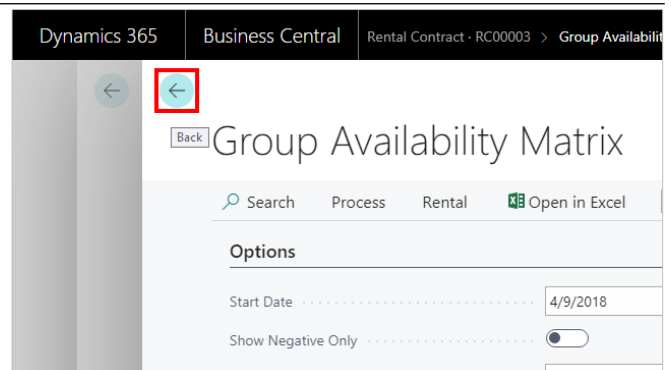


Click on the navigation menu item **Group Avail Matrix**

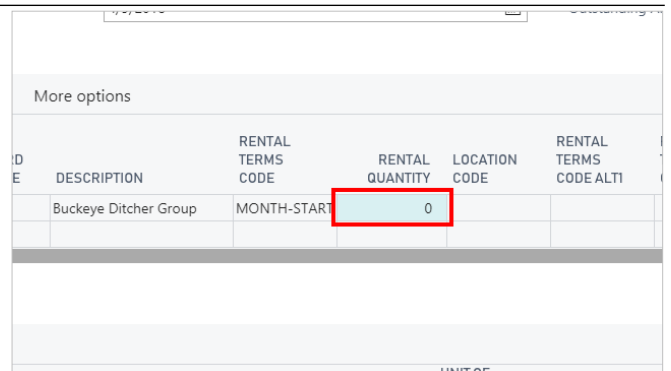
For information on the Group Availability Matrix, please see the ODT Rental Online help in Processing Rentals, Processing Rentals Overview - Group Availability Matrix Overview.



Click on the back button



Click on the cell **Rental Quantity**





Enter the text **2**.

More options					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	MONTH-START	2		
UNIT OF					

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-START	2				4/
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

Select the location from which the rental will occur.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE								
Group	MONTH-START	2			4/9/2018								
<table><thead><tr><th>CODE</th><th>NAME</th></tr></thead><tbody><tr><td>EAST</td><td>East Warehouse</td></tr><tr><td>Inventory Items Rev</td><td></td></tr><tr><td>WEST</td><td>West Warehouse</td></tr></tbody></table>						CODE	NAME	EAST	East Warehouse	Inventory Items Rev		WEST	West Warehouse
CODE	NAME												
EAST	East Warehouse												
Inventory Items Rev													
WEST	West Warehouse												
LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX								
	0		0.00	*									

Click on the cell **Rental Return Date**

Review and update, if needed, the Rental Return Date.

The Rental Return Date field is automatically calculated based on the Rental Period setup on the Rental Term which is on the line.

Should the Rental Return Date be different than the defaulted date, then update the Rental Return Date field with the date the units are expected to be returned.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	A
		4/9/2018	5/8/2018	500.00	0.00	
LINE AMOUNT						



Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card when setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

Should there not be a Rental Price card setup on the group, then the Rental Unit Price can be entered manually on the line.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	500.00	0.00	0.00

As a group has been entered on the rental line, the additional child rental lines will automatically be created, based on the Rental Quantity entered on the group line.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.**
lookup button

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group



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Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group which is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.** **lookup button**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Look up value

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group which is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

The fields on the child rental lines will contain the same data as on the rental unit group record.

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings.

For steps on adding a single rental unit to the rental lines, please see the ODT Rentals Online help, Processing Rentals, Rental Quotes -How to Create a Rental Quote and Make Contract.



3.4.2.3. Reviewing the Rental Amount Lines

Review the Rental Amount lines for the each of the child rental units to verify the expected rental billings, including the amounts and the Billing Date in the Rental Amounts lines.

For information on the Rental Amount Line fields, see the ODT Rental Online help, Processing Rentals, Rental Quote Overview.

Highlight a child rental line.

Select one of the child Rental Lines.

Click on the navigation menu item **More options**

Quote NO.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-START
RU00002		Buckeye Ditcher	MONTH-START

By clicking on the Pin at the right of the options, the user can set the command bar, so that the sub menu options are shown at all times.

Click on the navigation menu item popup **Line**

Quote NO.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-START
RU00002		Buckeye Ditcher	MONTH-START

Click on the navigation menu item **Rental Amount Lines**

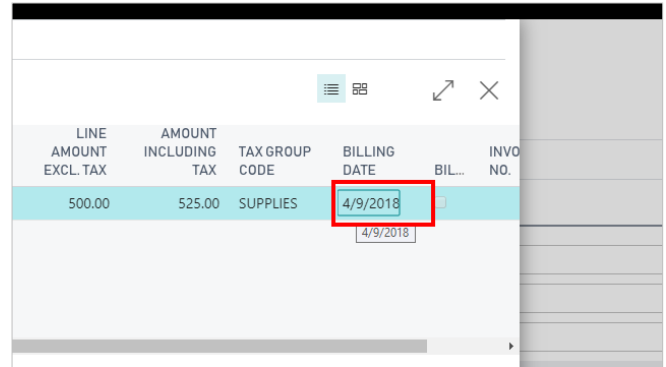
Order Date 4/9/2018

Document Date 4/9/2018

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-START
RU00002		Buckeye Ditcher	MONTH-START
RU00003		Buckeye Ditcher	MONTH-START

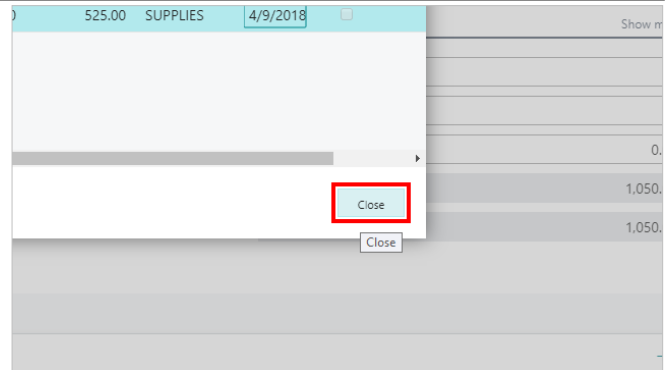
Click on the cell **Billing Date** with the value **4/9/2018**

The Billing Date provides users with the earliest date the unit can be invoiced on, when the Rental Term does not have the Early Billing Date Formula populated.



LINE	AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVO NO.
	500.00	525.00	SUPPLIES	4/9/2018		

Click on the button **Close**

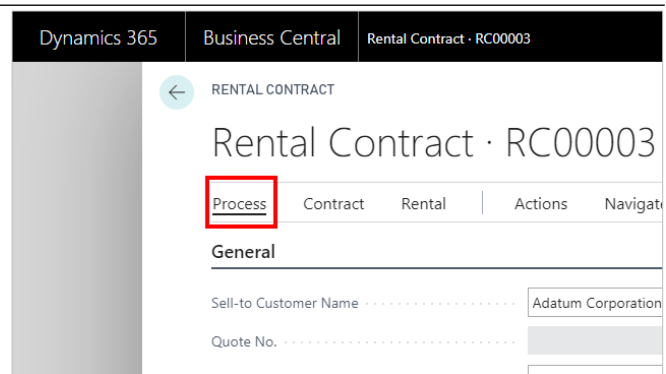


3.4.2.4.

Printing the Rental Contract

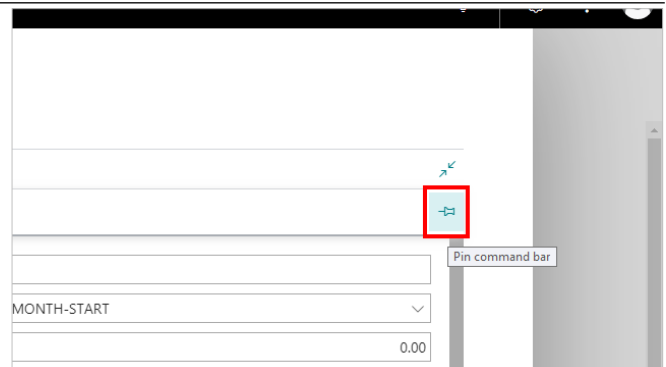
The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**

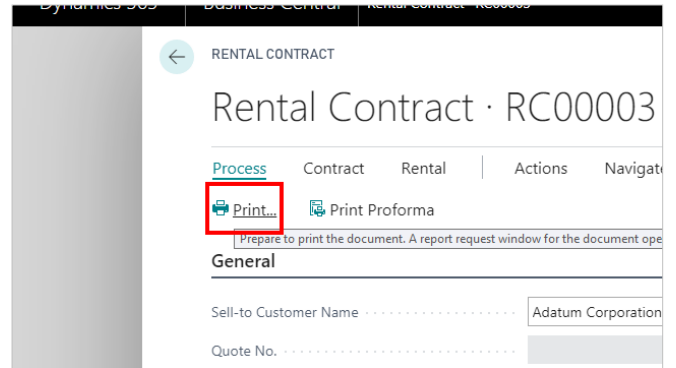


Click on the button **Pin command bar**

By clicking on the Pin at the right, the sub menu options will always automatically show as each main option is selected.



Click on the navigation menu item **Print...**



RENTAL CONTRACT

Rental Contract · RC000003

Process Contract Rental Actions Navigat

Print... Print Proforma

Prepare to print the document. A report request window for the document ope

General

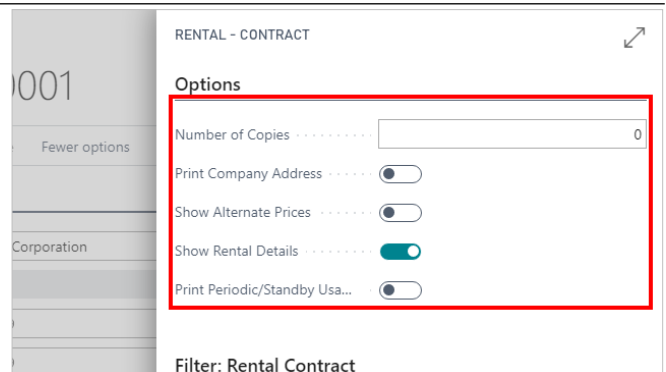
Sell-to Customer Name Adatum Corporation

Quote No.

Options tab

For information on the printing request page, Option tab fields, point to the field name.

For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.



RENTAL - CONTRACT

Options

Number of Copies 0

Print Company Address ☐

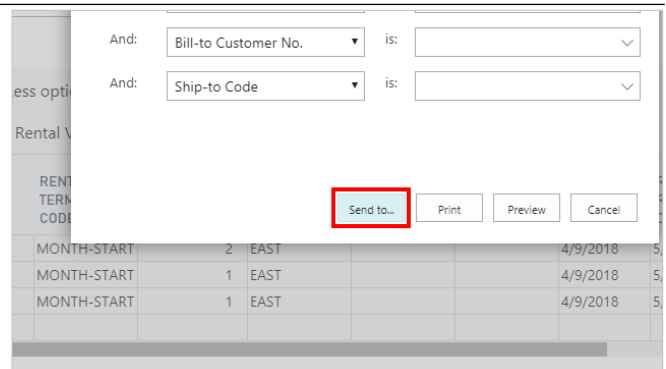
Show Alternate Prices ☐

Show Rental Details ☒

Print Periodic/Standby Usa... ☐

Filter: Rental Contract

Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print. Click on the button **Send to...**



And: Bill-to Customer No. is:

And: Ship-to Code is:

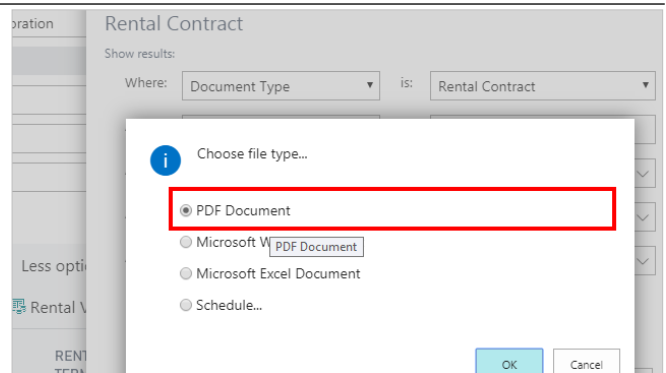
Send to... Print Preview Cancel

MONTH-START	2	EAST		4/9/2018	5
MONTH-START	1	EAST		4/9/2018	5
MONTH-START	1	EAST		4/9/2018	5

Click on the item **PDF Document**

In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.

Then select the OK button.



Rental Contract

Show results:

Where: Document Type is: Rental Contract

Choose file type...

☒ PDF Document

☐ Microsoft Word PDF Document

☐ Microsoft Excel Document

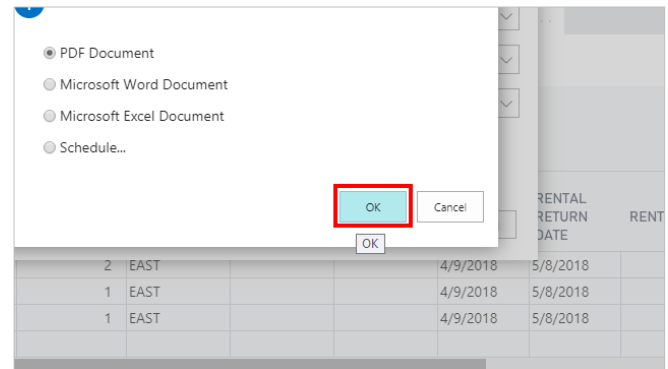
☐ Schedule...

OK Cancel

When PDF document is selected and OK is clicked on, then the pdf document file is displayed at the bottom left of the window.

Click on the document file to open the pdf file, then print or save the file to the location on the network, if applicable.

Click on the button **OK**



3.4.2.5. Shipping the Rental Units

Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

A listing of all rental units entered, however, not shipped is provided.

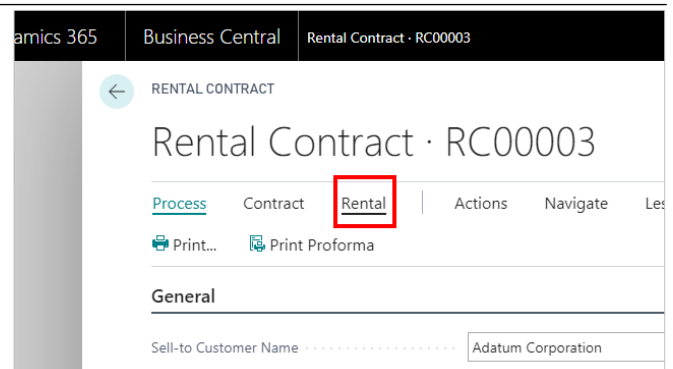
NOTE: Sales lines, pending shipments are not included in the listing.

NOTE:

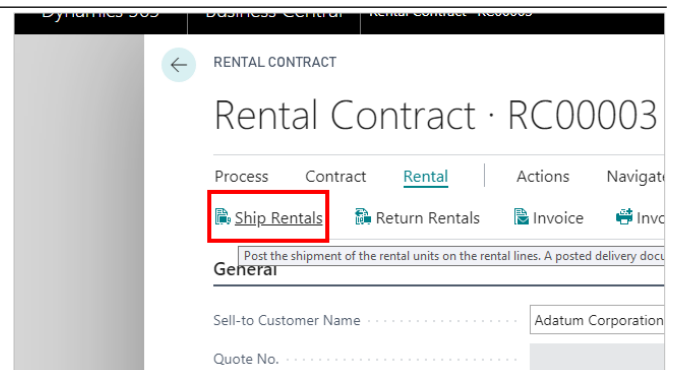
Should some of the rental units entered have different Rental Start Dates, then clear the Qty. to Rent on the lines that will be shipped on a later date than is in the Posting Date field on the General tab of the contract.

Otherwise all rental lines will be shipped as of the date in the Posting Date field.

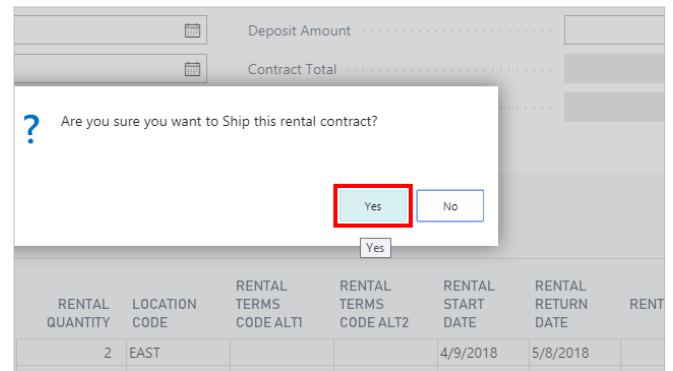
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**

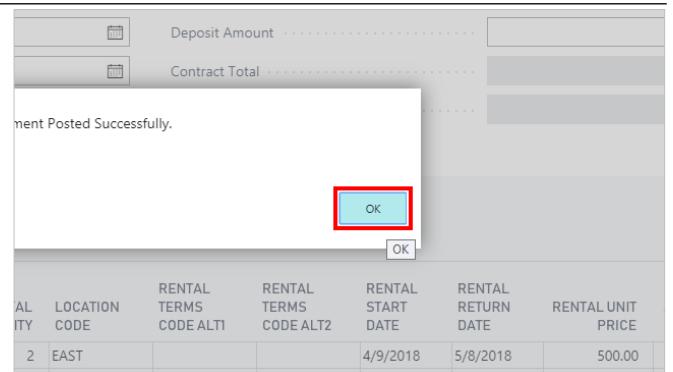


Are you sure you want to Ship this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/9/2018	5/8/2018	

Click on the button **OK**



Shipment Posted Successfully.

OK

AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST			4/9/2018	5/8/2018	500.00

Click on the cell **Qty. on Rent** with the value **1**
Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Options

Total Value Entries Additional Notes

ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED
0.00	0.00	0	0	0	0
0.00	0.00	0	1	0	0
0.00	0.00	0	1	0	0

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

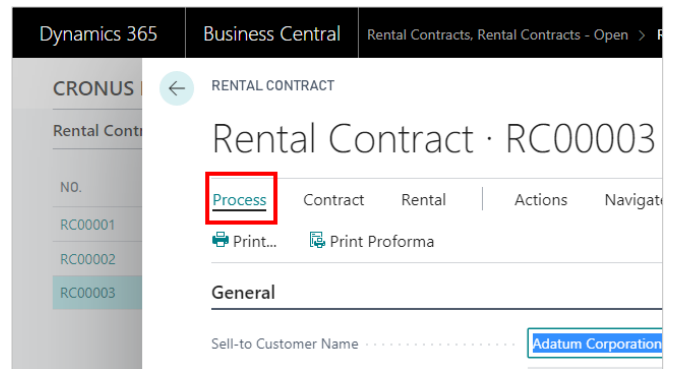
3.4.2.6. Printing or Previewing the Proforma Invoice

The Proforma Invoice is a pre-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

NOTE:

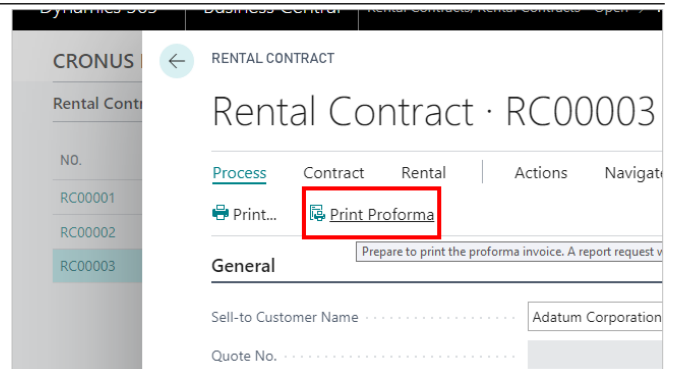
The Proforma will only print the details for those rental units which have been shipped.

Click on the navigation menu item popup **Process**



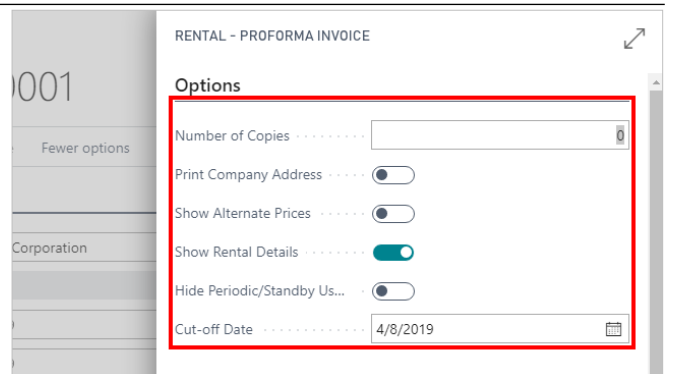
The screenshot shows the 'Rental Contract · RC00003' screen. On the left, there is a navigation menu with 'Process' highlighted. In the main area, the 'Process' button is also highlighted with a red box. Other buttons like 'Print...' and 'Print Proforma' are visible below it.

Click on the navigation menu item **Print Proforma**



The screenshot shows the 'Rental Contract · RC00003' screen. In the main area, the 'Print Proforma' button is highlighted with a red box. A tooltip message 'Prepare to print the proforma invoice. A report request v' is visible next to it.

Option tab fields when printing the Proforma Invoice

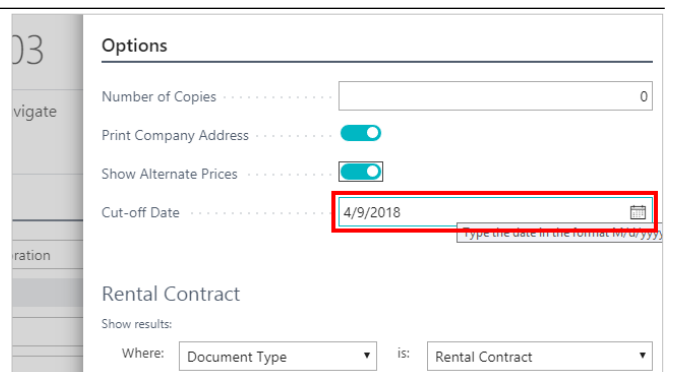


The screenshot shows the 'Options' tab in the 'RENTAL - PROFORMA INVOICE' screen. A red box highlights the following fields: 'Number of Copies' (text input), 'Print Company Address' (toggle), 'Show Alternate Prices' (toggle), 'Show Rental Details' (toggle), 'Hide Periodic/Standby Us...' (toggle), and 'Cut-off Date' (date input showing 4/8/2019).

For information on following Option tab fields, go to
ODT Rentals Online Help, Processing Rentals, Rental
Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

Click on the field **Cut-off Date**



The screenshot shows the 'Options' tab in the 'Rental Contract' screen. The 'Cut-off Date' field is highlighted with a red box and contains the date '4/9/2018'. A tooltip message 'Type the date in the format (m/d/yyyy)' is visible next to it.

The users' Work Date in My Settings, automatically
defaults to the Cut-off Date field until the first time the



Print Proforma is ran.

Then this date is saved in the page and must be updated when subsequently running the Print Proforma.

This can be overridden to specify what Cut-off Date for the Proforma Invoice should print the billing up to.

When on Rental Management Setup, the field, Default Blank Return Date is set to No, then the Cut-off Date entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

When the Rental Management Setup field, Default Blank Return Date is set to Yes, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Line(s) which have been invoiced and are marked as Billed. The Proforma prints based only on full rental periods.

Should a date be entered that is earlier than the Billing Date on the Rental Amount line, then a message "Nothing to Invoice" will be displayed.

Click on the button **Preview**

The Proforma Invoice can be sent to PDF, Printed or Previewed.

The screenshot shows a software interface for generating a Proforma Invoice. At the top, there are dropdown menus for 'Bill-to Customer No.' and 'Ship-to Code', each followed by an 'is:' label and another dropdown. Below these are buttons for 'Send to...', 'Print', 'Preview' (highlighted with a red box), and 'Cancel'. In the background, a table is visible with columns for 'RENTAL RETURN DATE', 'RENTAL UNIT', and 'RENTAL PRICE'. The table contains three rows of data with dates like 4/9/2018 and 5/8/2018, and a value of 500.

3.4.2.7. Invoicing the Rental Contract

As this example is for billing at the start of the contract the invoicing is to be processed after the shipment of the rental units.

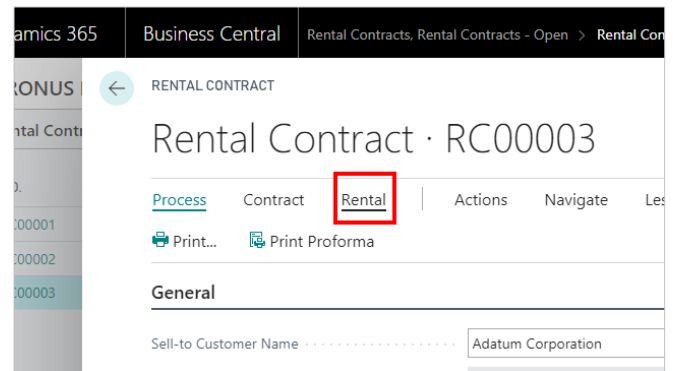
The Posting Date on the Contract, General tab is to be equal to or later than the Billing Date in the Rental Amount Lines. The Billing Date, by default, will be the same as the Rental Start Date.

Click on the field **Posting Date**

Should a date be in the Posting Date field that is earlier than the Billing Date, then a message "Nothing to Invoice" will occur.

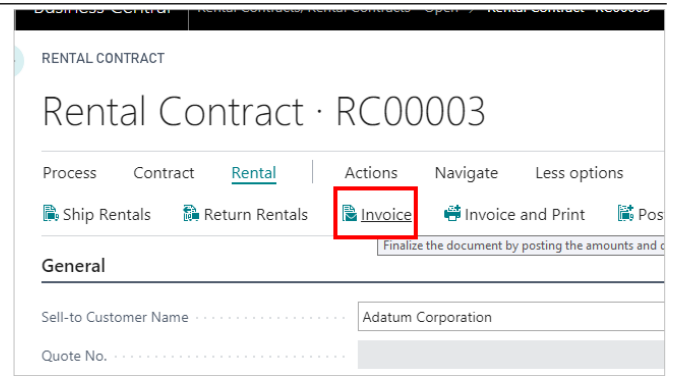
The screenshot shows a 'Proforma' form. At the top, there's a dropdown menu for 'Adatum Corporation'. Below it, there's a date field containing '4/9/2018', which is highlighted with a red box. To the right of the date field is a calendar icon. Below the date field, there's a text input field with the placeholder 'Type the date in the format M/d/yyyy'. At the bottom of the form, there are links for 'Manage' and 'More options'.

Click on the navigation menu item popup **Rental**



The screenshot shows the 'Rental Contract · RC00003' screen. The command bar at the top has tabs for 'Process', 'Contract', and 'Rental'. The 'Rental' tab is selected and highlighted with a red box. Below the command bar, there are icons for 'Print...' and 'Print Proforma'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the navigation menu item **Invoice**



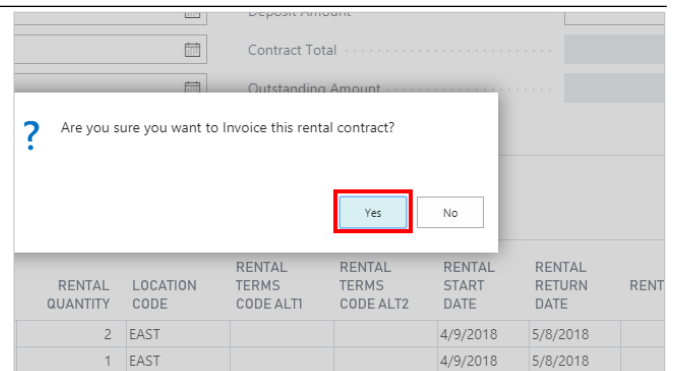
The screenshot shows the 'Rental Contract · RC00003' screen. The command bar at the top has tabs for 'Process', 'Contract', and 'Rental'. The 'Rental' tab is selected. Below the command bar, there are icons for 'Ship Rentals', 'Return Rentals', and 'Invoice'. The 'Invoice' icon is highlighted with a red box. Below the command bar, there are icons for 'Invoice and Print' and 'Post'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar options.

When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract. These options include Number of Copies, Print Company Address and Show Rental Details.

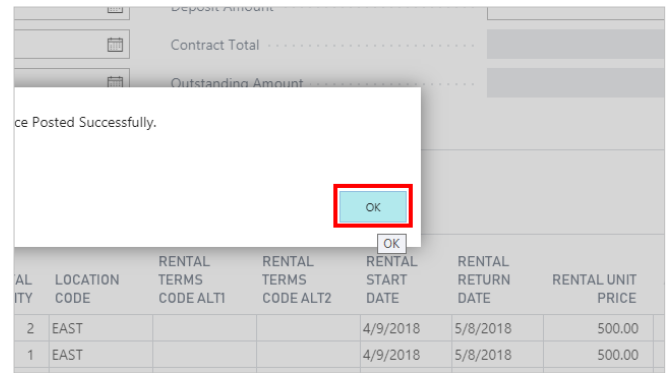
Click on the button **Yes**



The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Invoice this rental contract?'. There are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box. Below the dialog box, there is a table with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL.

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL
2	EAST			4/9/2018	5/8/2018	
1	EAST			4/9/2018	5/8/2018	

Click on the button **OK**



AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST			4/9/2018	5/8/2018	500.00
1	EAST			4/9/2018	5/8/2018	500.00

To review the Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.

A listing of posted invoices for the contract will be displayed.

The Posted Invoice can as well be printed from the invoice list or card.

3.4.2.8. Returning Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.

A listing of all rental units on rent is provided.

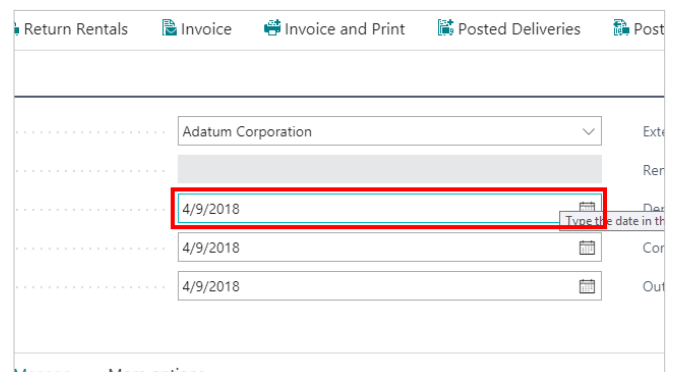
As the invoice has been posted, when the return is posted the Rental Contract will close.

In this example, the Rental Units are being returned on the Rental Return Date specified when the rental was entered.

Upon posting the return of the units the contract will close and will be available in the Completed Rental Contracts as the invoicing of this contract has already occurred.

Please see Reviewing Rentals - Completed and Posted Rental Documents in the ODT Rentals Online Help site for information on Completed Rental Contracts and Posted Rental Returns.

Click on the field **Posting Date**



Return Rentals	Invoice	Invoice and Print	Posted Deliveries	Post
Adatum Corporation				
4/9/2018				
4/9/2018				
4/9/2018				



ODT Rentals Online Help

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

corporation

External Document No.

Rental Terms Code

Deposit Amount

Select a date Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

External C

4/9/2018

Deposit A

April 2018

Contract

Outstand

Mo Tu We Th Fr Sa Su

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30

Next

Click on a date in the calendar

Select the date that the unit(s) are being returned.

In this example the units are being returned on the Rental Return Date.

to Customer Name

Adatum Corporation

te No.

ing Date

4/9/2018

r Date

ment Date

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Today Done

Manage More opti

ew Line Delete Line Group

RENTAL STANDARD RENTAL TERMS RENTAL I.C

Click on the cell **Qty. to Return**

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	0	0	0
0.00	0	1	0	0	0



Enter the text 1.

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1		0	0
0.00	0	1	0	0	0

Click on the cell **Qty. to Return** with the value 0

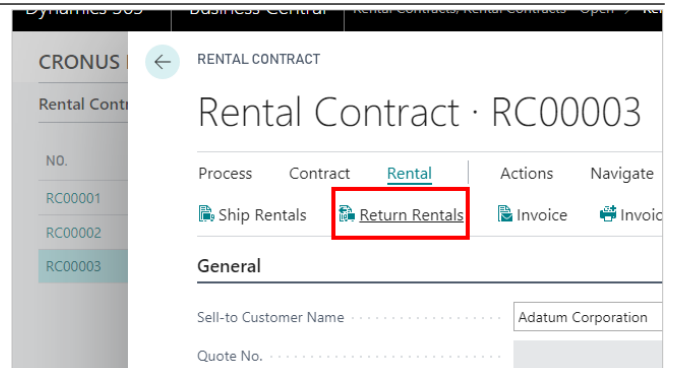
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	0	0	0

Enter the text 1.

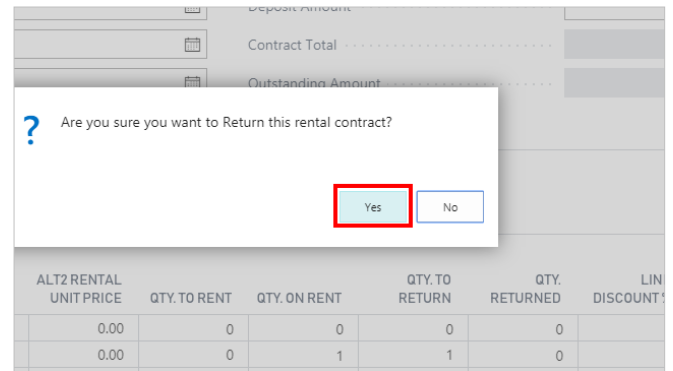
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	1	0	0

Click on the navigation menu item **Return Rentals**

Should the command bar not be pinned, the Return Rentals is located in the Rental command bar option.



Click on the button **Yes**



ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LIN.
0.00	0	0	0	0	
0.00	0	1	1	0	

The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.3. How to Process Contracts for Billing at End of the Contract

Profile - Sales Order Processor

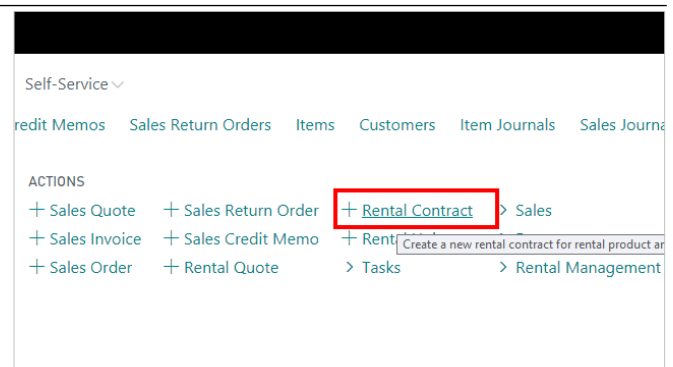
Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

The following example demonstrates the creation and processing of a contract for the pricing schema where the customer is billed for the full contract, at the end of the contract.

3.4.3.1. Creating a new Rental Contract for Billing at the End of the Contract

In this example, the Rental Contract command bar has been pinned to show the sub menu options automatically.

Click on the navigation menu item **Rental Contract**





Click on the field **Sell-to Customer Name**

The screenshot shows the 'Proforma' form with tabs for 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Sell-to Customer Name' field is highlighted with a red box.

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Select the Customer which the Rental Contract is for.

The screenshot shows the 'General' form with the 'Sell-to Customer Name' dropdown menu open. The option '10000 Adatum Corporation At' is selected and highlighted with a red box.

Click on the field **External Document No.**

If the customer has provided an external document number, then click on the field External Document No. field and enter it.

The screenshot shows the 'Rental Lines' form with the 'External Document No.' field highlighted with a red box.

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

The screenshot shows the 'Rental Lines' form with the 'Rental Terms Code' dropdown menu open. The option 'MONTH-PEND' is selected and highlighted with a red box.



ODT Rentals Online Help

Click on the link

Show more

t No.	
e	MONTH-END
.....	0.00
.....	0.00
unt	0.00

Click on **Code = MONTH-END**, **Description = Monthly Rental for Billing at End of Contract**

nal Document No.	
al Terms Code	MONTH-END
osit Amount	
ract Total	
tanding Amount	

CODE	DESCRIPTION
DAY-WEEK-PEND	Daily Rental - PEr. Er
MONTH-END	Monthly Rental for B
MONTH-END PROP	Monthly Rental for P
MONTH-END-OPT	Monthly Rental for C
MONTH-END-OPT-...	Monthly Rental for C
MONTH-PEND	Monthly Rental - Pe

Select record "MONTH-END"

+ New

Click on the field **Deposit Amount**

Show more

MONTH-END	
	0.00
	0.00
	0.00

Click on the field **Deposit Amount**

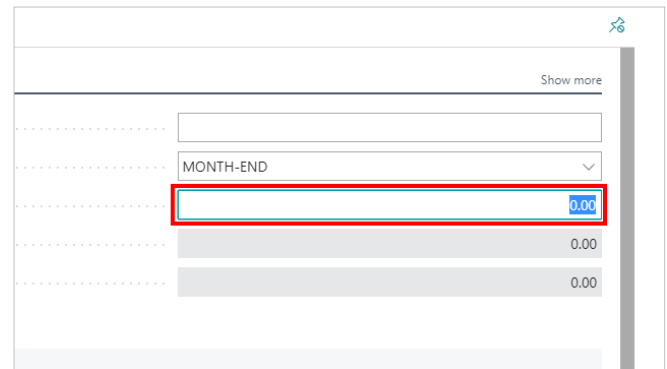
Show more

MONTH-END	
	0.00
	0.00
	0.00

Enter the text **200.00**.

If a deposit is required, enter the amount.
Otherwise, leave this field blank.

Once the Rental Lines and if applicable, the Sales Lines, are completed the Contract Total and Outstanding Amount fields will automatically be updated.

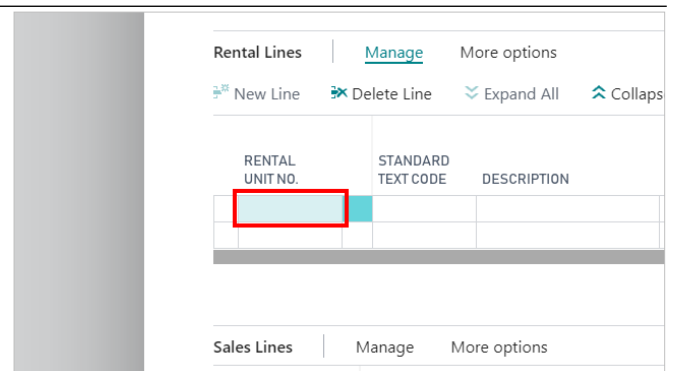


The screenshot shows a form with a 'MONTH-END' dropdown and a text input field containing '0.00'. The input field is highlighted with a red border.

3.4.3.2. Entering a Rental Unit Group on the Rental Lines

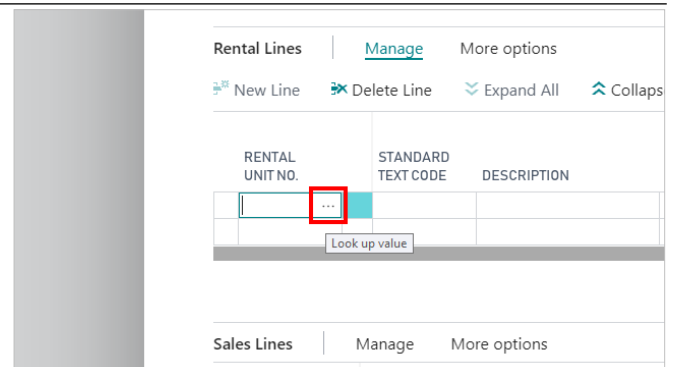
In this example, the Rental Lines command bar has been pinned to show the sub menu options automatically.

Click on the cell **Rental Unit No.**



The screenshot shows the 'Rental Lines' section with a 'Manage' button and a 'More options' dropdown. The 'RENTAL UNIT NO.' field is highlighted with a red border.

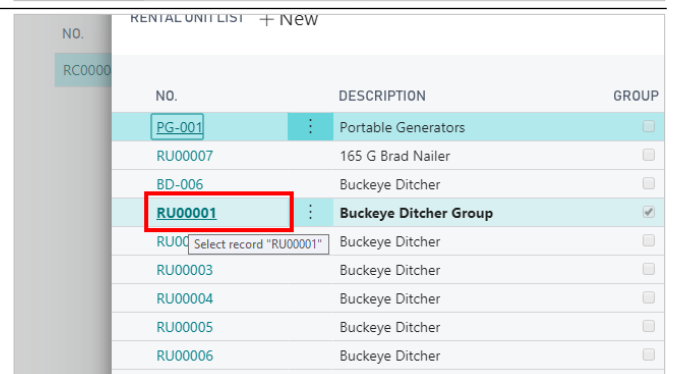
Click on the lookup button in the cell **Rental Unit No. lookup button**



The screenshot shows the 'Rental Unit No.' field with a lookup button (three dots) highlighted with a red border. Below the field is a 'Look up value' button.

Click on the link in cell **No.** with the value **RU00001**

Select the Rental Unit group that contains the Rental Units you wish to rent out



The screenshot shows a table of rental units. The 'RU00001' group is highlighted with a red border. The table has columns for 'NO.', 'DESCRIPTION', and 'GROUP'.

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

To review the rental group availability, complete the following steps.

CRITICAL:

The user must move off the Rental Unit No. field prior to reviewing the Group Availability Matrix.

Should this step be missed, this could lead to the contract not being able to be closed as Rental Amount Lines will be created on the group line and these cannot be deleted or invoiced.

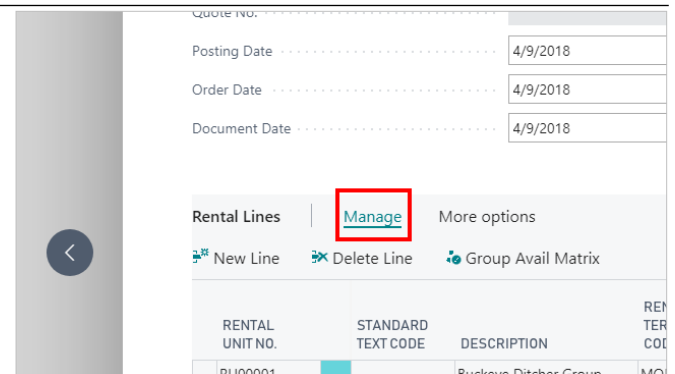
The only way to address this item is to delete the group and linked child lines and re-enter them, which would have to be done prior an invoice is posted. Once an invoice is posted, then although the child lines are fully invoiced and the units have been returned, the contract will not close.

If the units have been shipped, however not invoiced, then the Function, Undo Shipment must be ran on each child unit line.

Then the Rental Unit Group line must be deleted, which will delete the child unit lines.

After that the group must be re-entered and the units shipped, prior to invoicing.

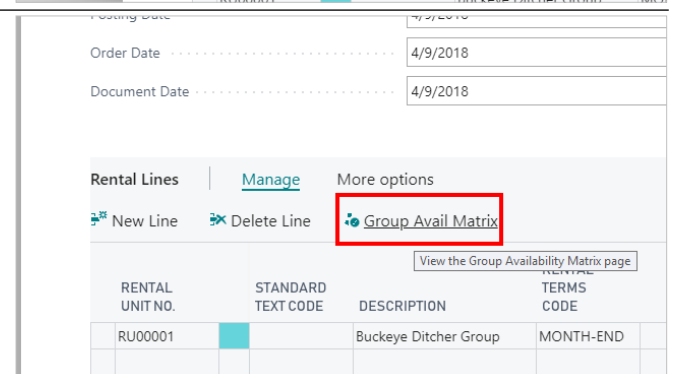
Click on the navigation menu item popup **Manage**



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL UNIT CODE
RU00001		Buckeye Ditcher Group	MO

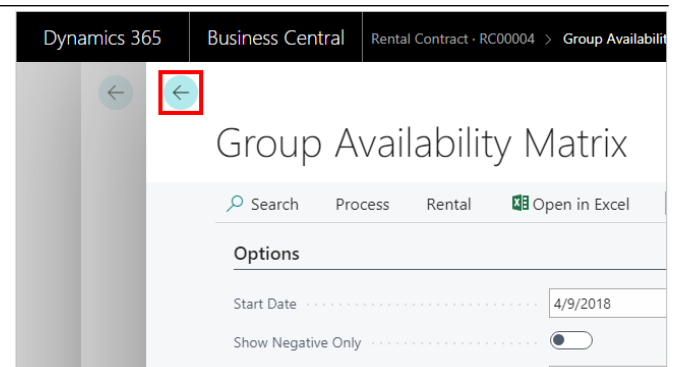
Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the ODT Rentals Online help, Processing Rentals Overview, Group Availability Matrix Overview.



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-END

Click on the back button





Click on the cell **Rental Terms Code**

Manage		More options		
✖ Delete Line		⚙ Group Avail Matrix		
STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	
Manage				
UNIT OF				

Click on the link in cell **Rental Terms Code**

Manage

More options

Delete Line

Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-P	0	
<div>Look up value</div>				

Manage

UNIT OF


Click on **Code = MONTH-END**, **Description = Monthly Rental for Billing at End of Contract**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
	Buckeye Ditcher Group	MONTH-PI	0		
Manage					
UNIT OF					

CODE	DESCRIPTION
DAY-WEEK-PEND	Daily Rental - Per. Er
MONTH-END	Monthly Rental for B
MONTH-END-OPT	Monthly Rental for P
MONTH-END-OPT-...	Monthly Rental for C
MONTH-PEND	Monthly Rental - Per
+ New	

Click on the cell **Rental Quantity**

More options

 Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-END	0		
UNIT OF				



ODT Rentals Online Help

Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Buckeye Ditcher Group	MONTH-END	2		

UNIT OF

Click on the cell **Location Code**

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Buckeye Ditcher Group	MONTH-END	2				4/9/2018

UNIT OF

Click on **Code = EAST, Name = East Warehouse**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-END	2				4/9/2018

CODE NAME

EAST	East Warehouse
RENTRESERV	Inventory Items Reserved
WEST	West Warehouse

U + New

LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	

Click on the cell **Rental Return Date**

Review and update, if needed, the Rental Return Date.

The Rental Return Date field is automatically calculated based on the Rental Period setup on the Rental Term which is on the line.

Should the Rental Return Date be different than the defaulted date, then update the Rental Return Date field with the date the units are expected to be returned.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
		4/9/2018	5/8/2018	500.00	0.00

LINE AMOUNT



Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card when setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

Should there not be a Rental Price card setup on the group, then the Rental Unit Price can be entered manually on the line.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	500.00	0.00	0.00

As a group has been entered on the rental line, then the additional child rental lines will automatically be created based on the Rental Quantity entered.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.** **lookup button**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group
	:	Buckeye Ditcher Group

Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group which is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	



Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Look up value

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group which is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Select record "RU00003"

The fields on the child rental lines will contain the same data as on the rental unit group record.

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings.

For steps on adding a single rental unit to the rental lines, please see the ODT Rentals Online help, Processing Rentals, Rental Quotes, How to Create a Rental Quote and Make Contract.

3.4.3.3. Reviewing the Rental Amount Lines

Review the Rental Amount lines for the each of the child rental units to verify the expected rental billings, including the amounts and the Billing Date in the Rental Amounts lines.

For information on the Rental Amount Line fields, see the ODT Rental Online help, Processing Rentals, Rental Quote Overview.

Highlight a child rental line.

Select one of the child Rental Lines.

Click on the navigation menu item **More options**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) **More options**

[New Line](#) [Delete Line](#) [Group](#) [Reveal secondary actions](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-END

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) **Line** Functions Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-END

Click on the navigation menu item **Rental Amount Lines**

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) [Line](#) Functions Less

Rental Amount Lines [Rental Ledger Entries](#) [Rental](#)

View the rental amount line records that will be billed for the sele

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

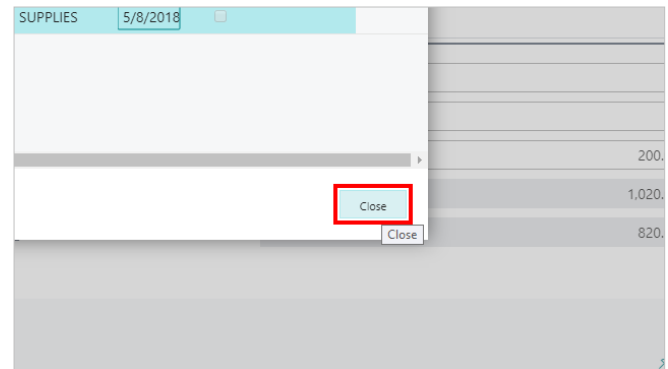
Click on the cell **Billing Date** with the value **5/8/2018**

The Billing Date provides users with the earliest date the unit can be invoiced on, when the Early Billing Date Formula is not populated on the selected Rental Term.

LINE	AMOUNT	AMOUNT	TAX GROUP	BILLING	INVOICE
AMOUNT	INCLUDING	TAX	CODE	DATE	NO.
EXCL. TAX	TAX				
500.00	510.00		SUPPLIES	5/8/2018	

5/8/2018

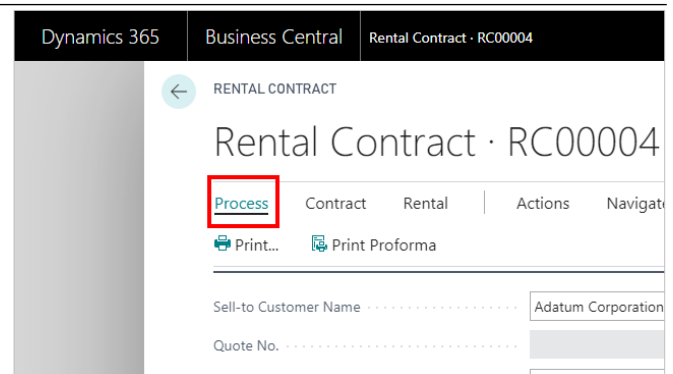
Click on the button **Close**



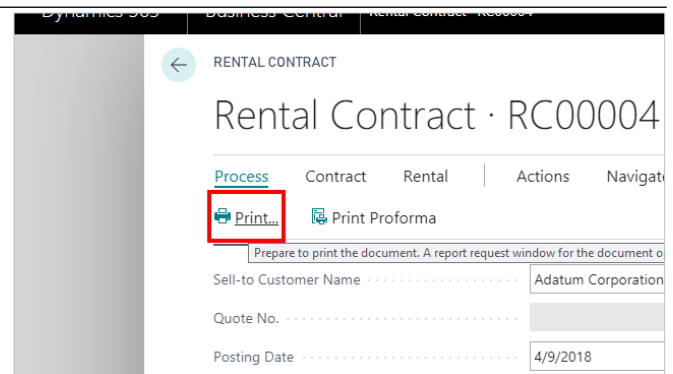
3.4.3.4. Printing the Rental Contract

The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**



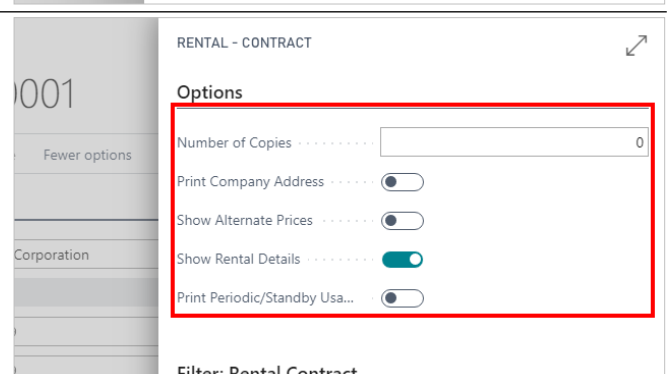
Click on the navigation menu item **Print...**



Options tab

For information on the printing request page, Option tab fields, point to the field name.

For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.



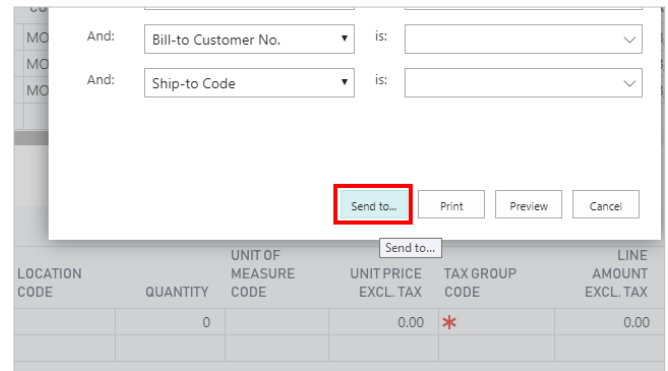
Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print.

The contract a well can be previewed.

Click on the button **Send to...**

In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.

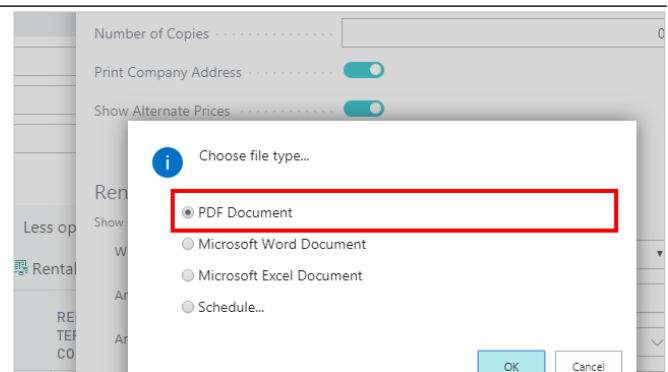
Then select the OK button.



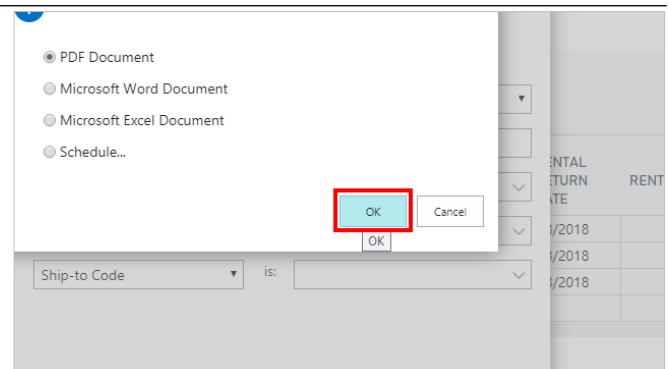
When PDF document is selected and OK is clicked on, then the file for the pdf document will show at the bottom left on the window.

Click on the file to open the pdf file. On the open file save the contract to the location where the document is to be saved to or print the file, if applicable.

Click on the item **PDF Document**



Click on the button **OK**



3.4.3.5. Shipping the Rental Units

Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

A listing of all rental units entered, however, not shipped is provided.

NOTE: Sales lines, pending shipments are not included in the listing.

NOTE:

Should some of the rental units entered have different Rental Start Dates, then clear the Qty. to Rent on the lines that will be shipped on a later date than is in the



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Posting Date field on the General tab of the contract.

Otherwise all rental lines will be shipped as of the date in the Posting Date field.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00004' screen. The 'Rental' tab is highlighted with a red box. Other tabs include 'Process', 'Contract', and 'Actions'. Below the tabs, there are fields for 'Sell-to Customer Name' (Adatum Corporation) and 'Quote No.'.

Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'Rental Contract · RC00004' screen. The 'Ship Rentals' button is highlighted with a red box. Other buttons include 'Return Rentals', 'Invoice', and 'Inv'. Below the buttons, there are fields for 'Sell-to Customer Name' (Adatum Corporation), 'Quote No.', and 'Posting Date' (4/9/2018).

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. The background shows a table with columns: QUANTITY, CODE, CODE ALT1, CODE ALT2, DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE.

QUANTITY	CODE	CODE ALT1	CODE ALT2	DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018	5/8/2018	
1	EAST			4/9/2018	5/8/2018	
1	EAST			4/9/2018	5/8/2018	

Click on the button **OK**

The screenshot shows a success message dialog box with the text 'ment Posted Successfully.'. The 'OK' button is highlighted with a red box. The background shows a table with columns: QUANTITY, CODE, CODE ALT1, CODE ALT2, DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE.

QUANTITY	CODE	CODE ALT1	CODE ALT2	DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018	5/8/2018	500.00
1	EAST			4/9/2018	5/8/2018	500.00
1	EAST			4/9/2018	5/8/2018	500.00

Click on the cell **Qty. on Rent** with the value **1**

Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Options					
Total Value Entries			Additional Notes		
ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED
0.00	0.00	0	0	0	0
0.00	0.00	0	1	0	0
0.00	0.00	0	1	0	0

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

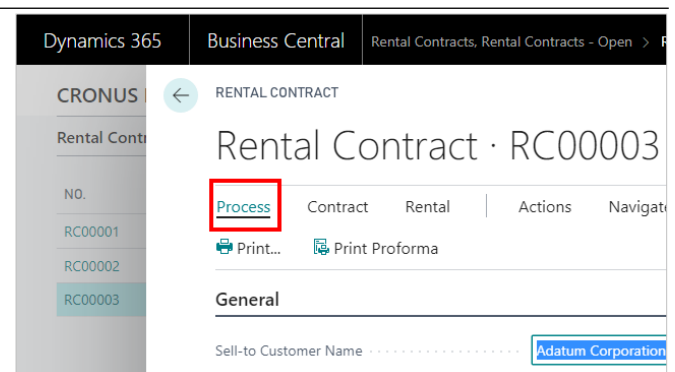
3.4.3.6. Printing or Previewing the Proforma Invoice

The Proforma Invoice is a pre-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

NOTE:

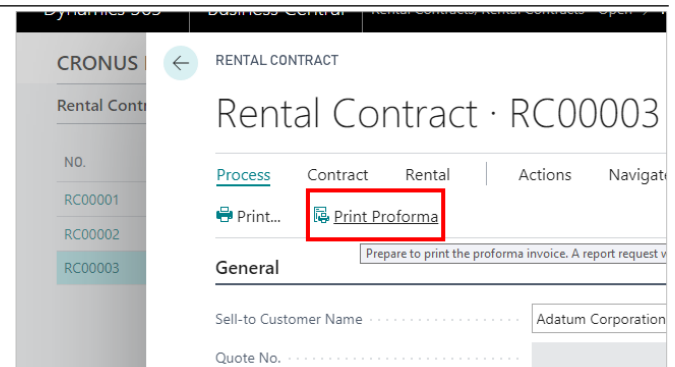
The Proforma will only print the details for those rental units which have been shipped.

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract · RC00003' card. In the top navigation bar, the 'Process' button is highlighted with a red box. Below the navigation bar, there are buttons for 'Print...' and 'Print Proforma'. The 'General' section shows the 'Sell-to Customer Name' as 'Adatum Corporation'.

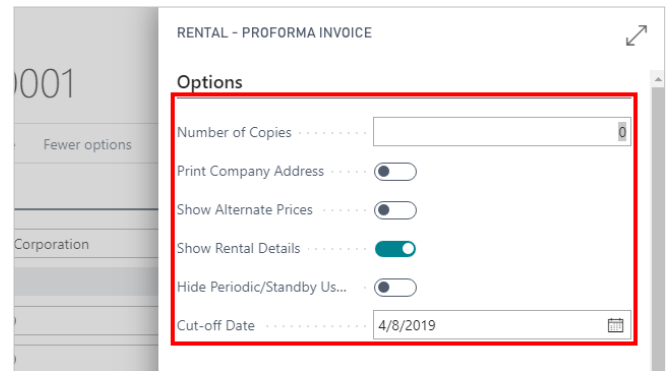
Click on the navigation menu item **Print Proforma**



The screenshot shows the 'Rental Contract · RC00003' card. In the top navigation bar, the 'Print Proforma' button is highlighted with a red box. Below the navigation bar, there are buttons for 'Print...' and 'Print Proforma'. The 'General' section shows the 'Sell-to Customer Name' as 'Adatum Corporation' and the 'Quote No.' field.

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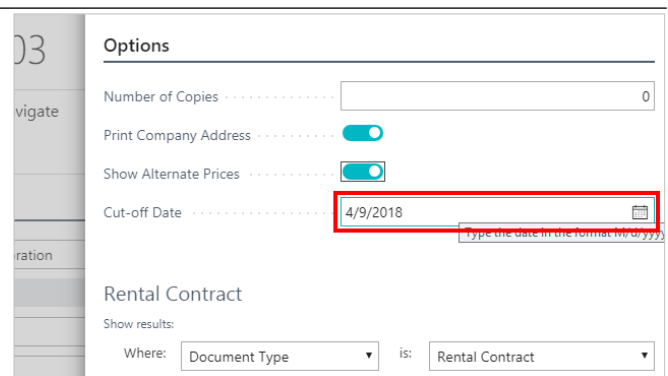
Option tab fields when printing the Proforma Invoice



For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

Click on the field **Cut-off Date**



The users' Work Date in My Settings, automatically defaults to the Cut-off Date field until the first time the Print Proforma is ran.

Then the date that was entered in this field the last time the Print Proforma was ran, is saved in the page and must be updated when subsequently running the Print Proforma.

This can be overridden to specify what Cut-off Date the Proforma Invoice should print the billing up to.

When on Rental Management Setup, the field, Default Blank Return Date is set to No, then the Cut-off Date entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

When the Rental Management Setup field, Default Blank Return Date is set to Yes, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Line(s) which have been invoiced and are marked as Billed. The Proforma prints based only on full rental periods.

Should a date be entered that is earlier than the Billing Date on the Rental Amount line, then a



message "Nothing to Invoice" will be displayed.


Click on the link

Options

Number of Copies 0

Print Company Address ☒

Show Alternate Prices ☒

Cut-off Date 4/9/2018 

Select a date

Rental Contract

Show results:


Where: Document Type is: Rental Contract


Click on the link **Next**

..... 0

ress ☒

es ☒

..... 4/9/2018 

April 2018 

Mo Tu We Th Fr Sa Next

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30

ment Type


Click on a date in the calendar
Select the date up to, for which the Proforma is to
print what the billing will be at that date.


NOTE:

The Billing Date in the Rental Amount lines provides
the earliest date at which the invoicing can occur.

Print Company Address ☒

Show Alternate Prices ☒

Cut-off Date 4/9/2018 

May 2018 

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Today Done

Rental Contract

Show results:

Where: Document Type

And: No.

And: Sell-to Customer No. is:

And: Bill-to Customer No. is:

Click on the button **Preview**

The Proforma Invoice can be Sent to PDF, Printed or
Previewed.

Bill-to Customer No. is:

Ship-to Code is:

Send to... Print **Preview** Cancel

Preview

RENTAL	RETURN	RENTAL UI
DATE	DATE	PRI
4/8/2018	5/8/2018	500
4/8/2018	5/8/2018	500
4/9/2018	5/8/2018	500

Below is an example of the Proforma Invoice for this contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Proforma Invoice			
		Page: 1			
		Rental Contract Number:		RC00004	
		Rental Proforma Date:		5/8/2018	
Sell		Ship			
To: Adatum Corporation		To: Adatum Corporation		P.O. Number	
Robert Townes		Robert Townes		Customer ID 10000	
192 Market Square		192 Market Square		SalesPerson Peter Saddow	
Atlanta, GA 31772		Atlanta, GA 31772			
		Ship Via			
		Terms			
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002	Buckeye Ditcher	BD-002	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
RU00003	Buckeye Ditcher	BD-003	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Amount Subject to Sales Tax				1,000.00	
Amount Exempt from Sales Tax				0.00	
Subtotal:					1,000.00
Total Sales Tax:					20.00
Total:					1,020.00

3.4.3.7. Invoicing the Rental Contract

In this example, the Rental Term has an Invoicing Type of End.

When using a Rental Term with the Invoicing Type of End, the invoicing and the return of the rental units can be done in any order. The invoice can be posted, then the units returned or the units can be returned and then



the invoice posted.

In this example, the invoicing is being done and then the return of the units.

Click on the field **Posting Date**

The Posting Date must be equal to or later than the Billing Date that is in the Rental Amount Lines for the unit(s), when the Rental Term does not have an Early Billing Date Formula specified.

Should a date be entered in the Posting Date field that is earlier than the Billing Date, then a message "Nothing to Invoice" will occur.

The screenshot shows the 'Rental' form with tabs for 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Proforma' section is active. The 'Posting Date' field is highlighted with a red box and contains the date '4/9/2018'. Other fields include 'Adatum Corporation' for the customer name and '4/9/2018' for the rental start and end dates.

Click on the link

This screenshot is similar to the previous one, showing the 'Rental' form with the 'Posting Date' field highlighted. The 'Line' tab is now selected at the bottom of the form.

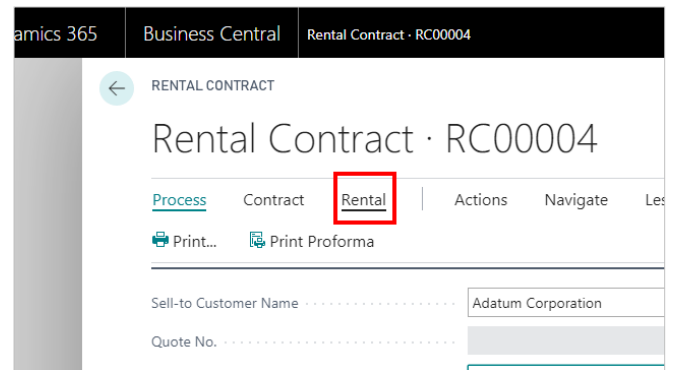
Click on the link **Next**

This screenshot shows the 'Rental' form with the 'Posting Date' field highlighted. A calendar pop-up is visible, showing the month of April 2018. The date '4/9/2018' is entered in the field.

Click on a date in the calendar

This screenshot shows the 'Rental' form with the 'Posting Date' field highlighted. A calendar pop-up is visible, showing the month of May 2018. The date '4/9/2018' is entered in the field. The 'Line' tab is selected at the bottom of the form.

Click on the navigation menu item popup **Rental**



amics 365 | Business Central | Rental Contract · RC00004

← RENTAL CONTRACT

Rental Contract · RC00004

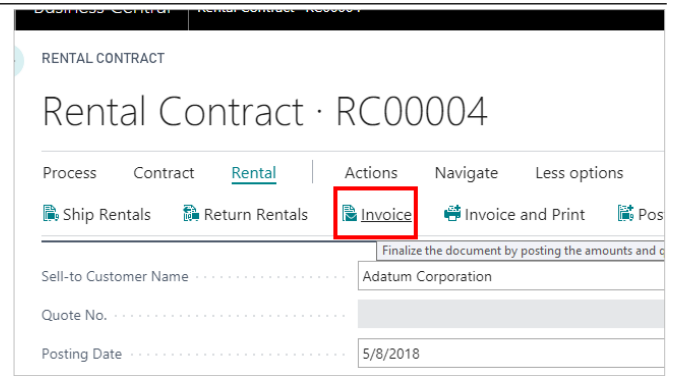
Process | Contract | **Rental** | Actions | Navigate | Less options

Print... | Print Proforma

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**



Business Central | Rental Contract · RC00004

RENTAL CONTRACT

Rental Contract · RC00004

Process | Contract | Rental | **Invoice** | Actions | Navigate | Less options

Ship Rentals | Return Rentals | Invoice | Invoice and Print | Post

Finalize the document by posting the amounts and c

Sell-to Customer Name Adatum Corporation

Quote No.

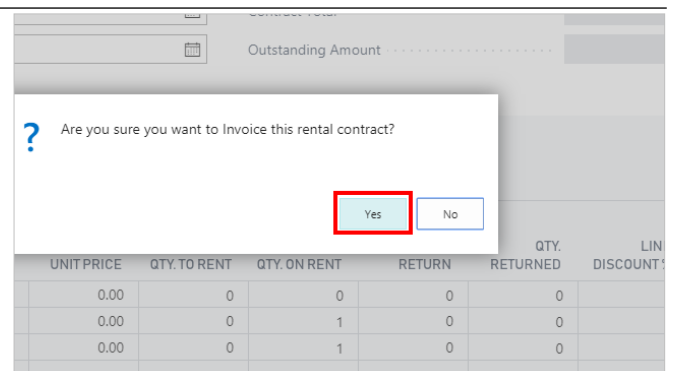
Posting Date 5/8/2018

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from an open or Completed Rental Contract - Posted Invoices, an invoice was printed, the options specified at that time will be used when running Invoice and Print from an open Rental Contract.

Click on the button **Yes**



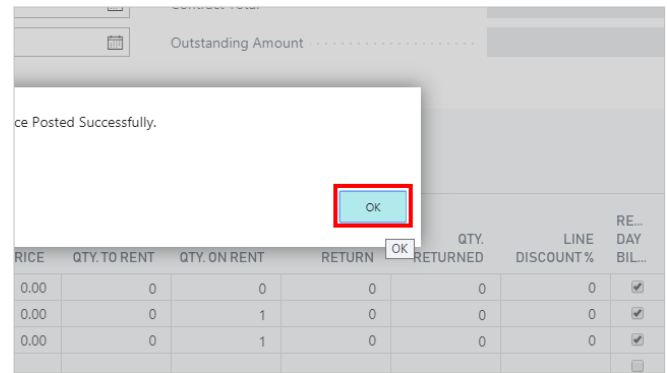
Outstanding Amount

? Are you sure you want to Invoice this rental contract?

Yes | No

UNIT PRICE	QTY. TO RENT	QTY. ON RENT	RETURN	QTY. RETURNED	LINE DISCOUNT
0.00	0	0	0	0	
0.00	0	1	0	0	
0.00	0	1	0	0	

Click on the button **OK**

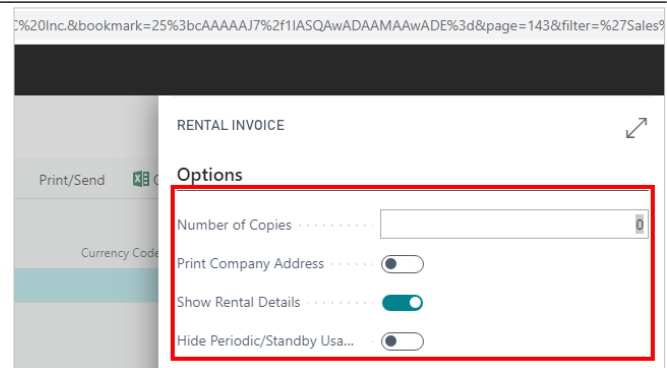


To review the Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.

A listing of posted invoices for the contract will be displayed.

The Posted Invoice can as well be printed from the invoice list or card.

Option tab fields when printing the Rental Invoice



For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

3.4.3.8. Returning Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.

A listing of all rental units on rent is provided.

In this example the returns are being returned after the invoicing of the contract.

When the following steps are completed, the Rental Contract will close and will be available in the Completed Rental Contracts as the invoicing of this contract has already occurred.

Please see Reviewing Rentals - Completed and Posted Rental Documents in the ODT Rentals Online Help for information on Completed Rental Contracts.



ODT Rentals Online Help

Click on the field **Posting Date**

Verify the Posting Date is set to the date the rental units are being returned.

Rental | Actions | Navigate | Less options

Return Rentals | Invoice | Invoice and Print | Posted Deliveries | Post

Adatum Corporation

5/8/2018

4/9/2018

5/8/2018

Type the date in the format MM/yyyy

Manage | Line | Functions | Less options

Click on the cell **Qty. to Return**

Additional Notes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	0	0	0
0.00	0	1	0	0	0

Enter the text **1**.

Additional Notes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	0	0	0

Click on the cell **Qty. to Return**

Additional Notes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	0	0	0

UNIT OF | LINE | AMOUNT



Enter the text 1.

Additional Notes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1		0	0

UNIT OFLINEAMOUNT

Click on the navigation menu item popup **Rental**

amics 365Business CentralRental Contract · RC00004

RENTAL CONTRACT

Rental Contract · RC00004

ProcessContractRentalActionsNavigateLes

Ship RentalsReturn RentalsInvoiceInvoice and I

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Return Rentals**

amics 365Business CentralRental Contract · RC00004

RENTAL CONTRACT

Rental Contract · RC00004

ProcessContractRentalActionsNavigate

Ship RentalsReturn RentalsInvoiceInvoice

Post the return of the rental units on the rental li

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/8/2018

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

YesNo

UNIT PRICE	QTY. TO RENT	QTY. ON RENT	RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	1	0	0

The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.4. How to Process Contracts with Periodic Billing in



Advance

Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manger profile using the steps provided here.

The following example demonstrates the creation and processing of a contract, for the pricing schema where the customer is billed in advance periodically for each rental period the customer has the units.

In this example, the rental will be for two rental periods.

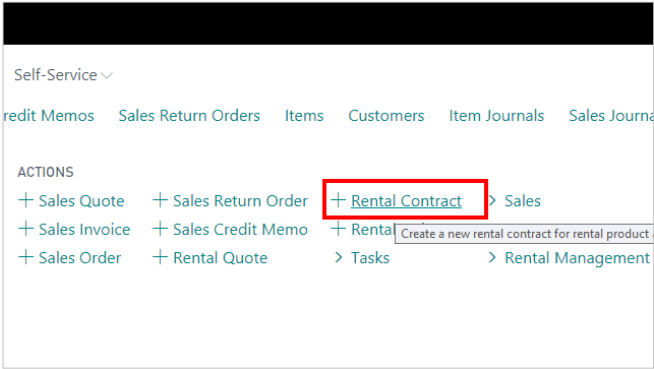
3.4.4.1. Creating a new Rental Contract for Periodic Billing in Advance

In this example, the Rental Contract command bar has been pinned to show the sub menu options automatically.

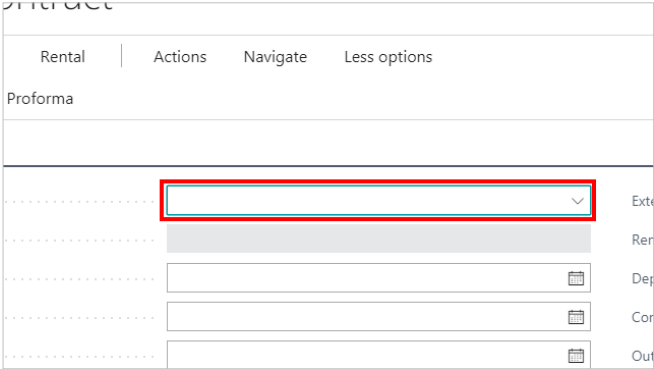
In the example provided here the rental term used is a monthly rental term for periodic billing in advance.

The contract is for 2 months for which individual invoices will be generated each month, billing one month at a time at the start of each rental period.

Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**





ODT Rentals Online Help

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Select the Customer that the Rental Contract is for.

Print... Print Proforma

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Trey Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Select record "10000"

Rental Lines [Manage](#) More options + New

Click on the field **External Document No.**

If the customer has provided an external document
number, then enter it in this field.

Show more

MONTH-PEND

0.00

0.00

0.00

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a
Customer card, it will default to this field.
The term can be changed should the contract be for a
different pricing schema by looking up and selecting
the applicable Rental Term.

The term will automatically populate the Rental Terms
Code field on the Rental Lines, when Rental
Management Setup does not have the field, Use Unit
Rental Terms checked and the Rental Unit does not
have a default Rental Term Code specified.

Show more

MONTH-PEND

0.00

0.00

0.00

Click on the link

Show more

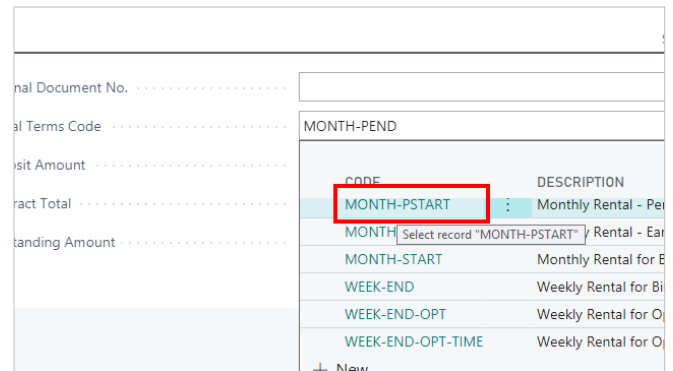
MONTH-PEND

0.00 [Look up value](#)

0.00

0.00

Click on **Code = MONTH-PSTART**, **Description = Monthly Rental - Per. Billing in Advance**

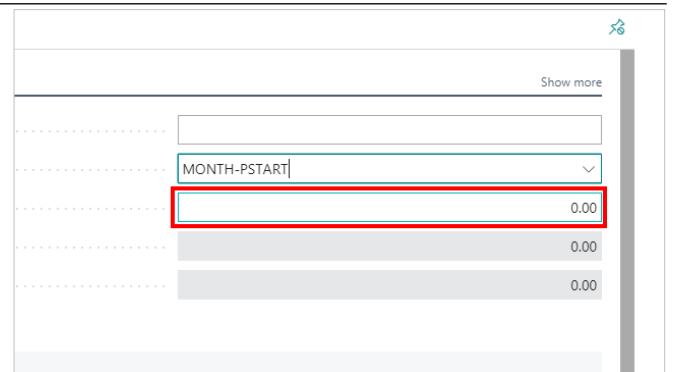


The screenshot shows a form with several fields: 'Initial Document No.', 'Initial Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount'. A dropdown menu is open for the 'Initial Terms Code' field, showing a list of codes and descriptions. The code 'MONTH-PSTART' is highlighted in a red box, and its description 'Monthly Rental - Per. Billing in Advance' is visible next to it. Other codes in the list include 'MONTH-START', 'WEEK-END', 'WEEK-END-OPT', and 'WEEK-END-OPT-TIME'.

Click on the field **Deposit Amount**

Should a deposit be required from the Customer, enter the amount in the Deposit Amount field.

Once the Rental Lines fields are completed the Contract Total and Outstanding Amount fields will automatically be populated.

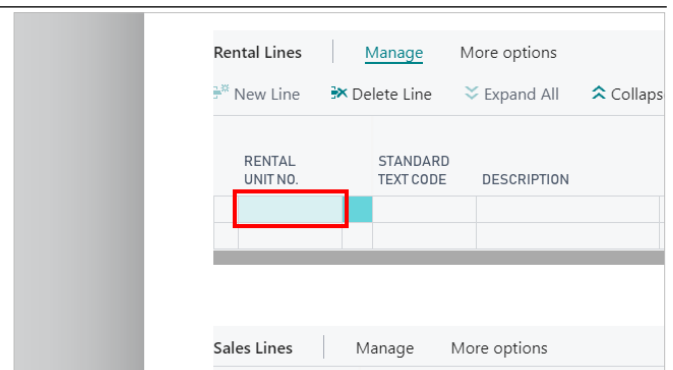


The screenshot shows the 'Deposit Amount' field, which is currently empty. Below it, there is a table with columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The first row shows 'MONTH-PSTART' in the 'STANDARD TEXT CODE' column and '0.00' in the 'DESCRIPTION' column. The second and third rows also show '0.00' in the 'DESCRIPTION' column.

3.4.4.2. Entering a Rental Unit Group on the Rental Lines

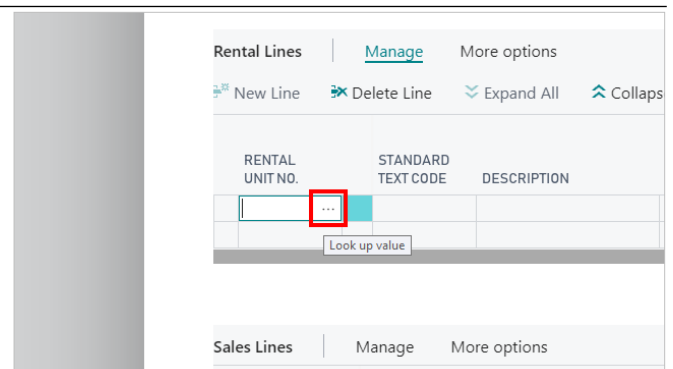
In this example, the Rental Lines command bar has been pinned to show the sub menu options automatically.

Click on the cell **Rental Unit No.**



The screenshot shows the 'Rental Lines' section with a 'Manage' button and 'More options'. Below this is a table with columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The first row shows an empty 'RENTAL UNIT NO.' field, which is highlighted in a red box. The second and third rows also show empty 'RENTAL UNIT NO.' fields. Below the table is a 'Sales Lines' section with a 'Manage' button and 'More options'.

Click on the lookup button in the cell **Rental Unit No.** **lookup button**



The screenshot shows the 'Rental Unit No.' field with a red box around it. A small '...' button (lookup button) is visible next to the field. Below the field, there is a 'Look up value' button. The rest of the interface is the same as the previous screenshot.



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00001**

Select the Rental Unit group that contains the Rental Unit you wish to rent out.

RENTAL UNIT LIST + New			
NO.		DESCRIPTION	GROUP
PG-001		Portable Generators	<input type="checkbox"/>
RU00007		165 G Brad Nailer	<input type="checkbox"/>
BD-006		Buckeye Ditcher	<input type="checkbox"/>
RU00001		Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00002	Select record "RU00001"	Buckeye Ditcher	<input type="checkbox"/>
RU00003		Buckeye Ditcher	<input type="checkbox"/>
RU00004		Buckeye Ditcher	<input type="checkbox"/>
RU00005		Buckeye Ditcher	<input type="checkbox"/>
RU00006		Buckeye Ditcher	<input type="checkbox"/>

To review the rental group availability, complete the following steps.

CRITICAL:
The user must move off the Rental Unit No. field prior to reviewing the Group Availability Matrix.

Should this step be missed, this could lead to the contract not being able to be closed as Rental Amount Lines will be created on the group line and these cannot be deleted or invoiced.

The only way to address this item is to delete the group and linked child lines and re-enter them, which would have to be done prior an invoice is posted. Once an invoice is posted, then although the child lines are fully invoiced and the units have been returned, the contract will not close.

If the units have been shipped, however not invoiced, then the Function, Undo Shipment must be ran on each child unit line.
Then the Rental Unit Group line must be deleted, which will delete the child unit lines.
After that the group must be re-entered and the units shipped, prior to invoicing.

Click on the navigation menu item popup **Manage**

Quote No.

Posting Date

4/9/2018

Order Date

4/9/2018

Document Date

4/9/2018

Rental Lines

Manage

More options

New Line

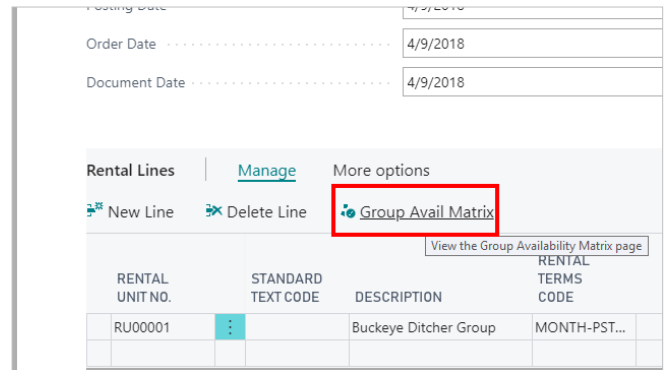
Delete Line

Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	REN TER COD
RU00001		Buckeye Ditcher Group	M

Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the ODT Rental Online help in Processing Rentals, Processing Rentals Overview - Group Availability Matrix Overview.



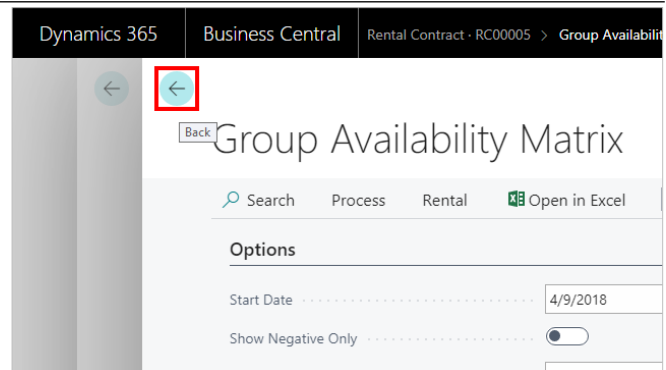
Processing Date: 4/9/2018
Order Date: 4/9/2018
Document Date: 4/9/2018

Rental Lines | [Manage](#) | More options
New Line | Delete Line | **Group Avail Matrix**

View the Group Availability Matrix page

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST...

Click on the back button



Dynamics 365 | Business Central | Rental Contract - RC00005 > Group Availabil...

Back

Group Availability Matrix

Search | Process | Rental | Open in Excel

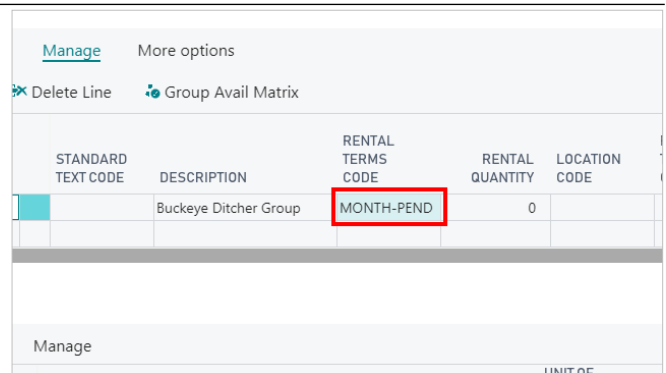
Options

Start Date: 4/9/2018
Show Negative Only: ☐

The Rental Term Code field will automatically be populated from the Rental Unit Group card as the field, Use Rental Unit Terms, has been checked on Rental Management Setup,

As the Rental Term setup on the Rental Unit Group is not a periodic billing in advance rental term, the rental term must be changed using the following steps.

Click on the cell **Rental Terms Code**



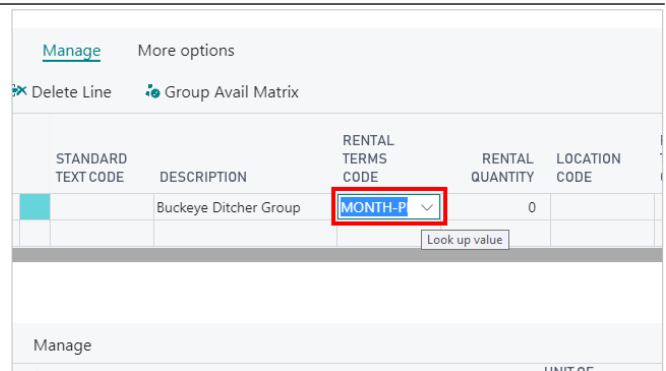
[Manage](#) | More options
Delete Line | Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Manage

UNIT OF

Click on the link in cell **Rental Terms Code**



[Manage](#) | More options
Delete Line | Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-P	0	

Look up value

Manage

UNIT OF



ODT Rentals Online Help

Click on **Code = MONTH-PSTART**, **Description = Monthly Rental - Per. Billing in Advance**

ITEM CODE	DESCRIPTION	CODE	QUANTITY	CODE	CODE
	Buckeye Ditcher Group	MONTH-P	0		
		CODE	DESCRIPTION		
			MONTH-END-OPT-...		
			MONTH-RENTAL-...		
			MONTH-PEND		
			MONTH-PEND-EARLY		
			MONTH-PSTART		
			MONTH-PSTART-EA...		
			MONTH-START		
			+ New		

Click on the cell **Rental Quantity**

More options

Group Avail Matrix

ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	MONTH-PST...	0		

UNIT OF

Enter the text **2**.

More options

Group Avail Matrix

ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	MONTH-PST...	2		

UNIT OF

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be set to Yes, then in order to process the rental the Location Code must be entered.

More options

Group Avail Matrix

ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2
	Buckeye Ditcher Group	MONTH-PST...	2			

UNIT OF



Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018	5/8/2018	500.00	0.00	0.00	

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

TAX GROUP CODE	LINE AMOUNT EXCL. TAX	QTY. TO SHIP	QUANTITY SHIPPED
	0.00	0	0

Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card when setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

Should there not be a Rental Price card setup on the group, then the Rental Unit Price can be entered manually on the line.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	500.00	0.00	0.00

As a group has been entered on the rental line, then the additional child rental lines will automatically be created based on the Rental Quantity entered.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

Rental Lines

[Manage](#) More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collapse All](#)

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines

[Manage](#) More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collapse All](#)

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...

Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group which is to be rented.

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Select record "RU00002"	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-PST...
RU00002	Buckeye Ditcher	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...

Click on the lookup button in the cell **Rental Unit No.** lookup button

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-PST...
RU00002	Buckeye Ditcher	MONTH-PST...
	Buckeye Ditcher Group	MONTH-PST...

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group which is to be rented.

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
R	Select record "RU00003"	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings when the user moves off the group line.

3.4.4.3. Reviewing the Rental Amount Lines

Review the Rental Amount lines for the each of the child rental units to verify the expected rental billings, including the amounts and the Billing Date in the Rental Amounts lines.



For information on the Rental Amount Line fields, see the ODT Rental Online help, Processing Rentals, Rental Quote Overview.

Highlight a child rental line.

Select one of the child Rental Lines.

Click on the navigation menu item **More options**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) | **More options**

[New Line](#) [Delete Line](#) [Group Avail Matrix](#) [Reveal secondary actions](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) | **Line** | Functions | Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

Click on the navigation menu item **Rental Amount Lines**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) | [Line](#) | Functions | Less

Rental Amount Lines [Rental Ledger Entries](#) [Rental Amount Lines](#)

View the rental amount line records that will be billed for the s

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **4/9/2018**

Note that the Billing Date on the first record is the same as the date in the Starting Date-Time field.

LINE AMOUNT EXCL. TAX

AMOUNT INCLUDING TAX

TAX GROUP CODE

BILLING DATE

500.00	510.00	SUPPLIES	4/9/2018
500.00	510.00	SUPPLIES	4/9/2018

Show more

Click on the cell **Billing Date** with the value **5/9/2018**

Note that the Billing Date on the second record is the same as the date in the Starting Date-Time field on the second record.

LINE	AMOUNT	TAX GROUP	BILLING	INVO
AMOUNT	INCLUDING	TAX	DATE	NO.
EXCL. TAX	TAX	CODE		
500.00	510.00	SUPPLIES	4/9/2018	
500.00	510.00	SUPPLIES	5/9/2018	

Click on the button **Close**

510.00	SUPPLIES	4/9/2018	
510.00	SUPPLIES	5/9/2018	

3.4.4.4. Printing the Rental Contract

The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**

Dynamics 365
Business Central
Rental Contract - RC00005

← RENTAL CONTRACT

Rental Contract · RC00005

Process Contract Rental Actions Navigat

Print... Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Print...**

Dynamics 365
Business Central
Rental Contract - RC00005

← RENTAL CONTRACT

Rental Contract · RC00005

Process Contract Rental Actions Navigat

Print... Print Proforma

Prepare to print the document. A report request window for the document ope

General

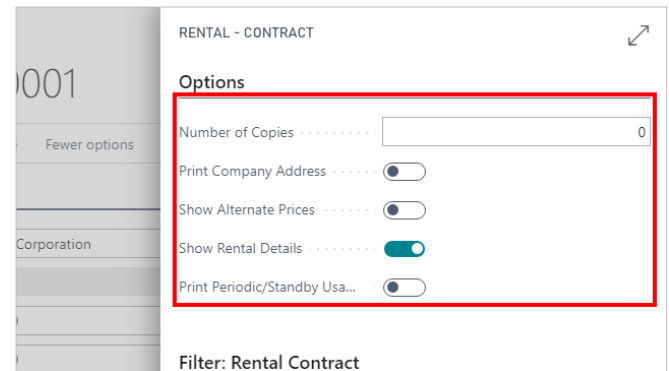
Sell-to Customer Name Adatum Corporation

Quote No.

Options tab

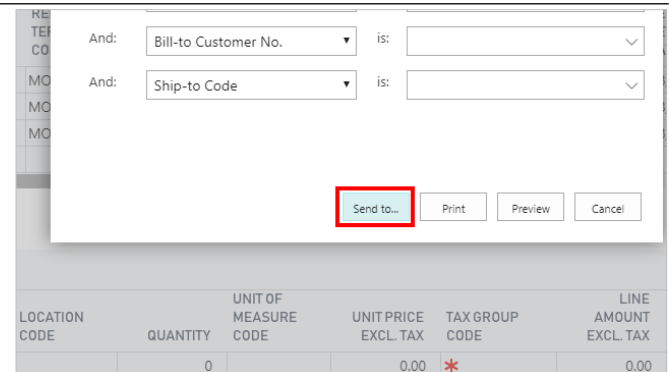
For information on the printing request page, Option tab fields, point to the field name.

For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.



Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print.

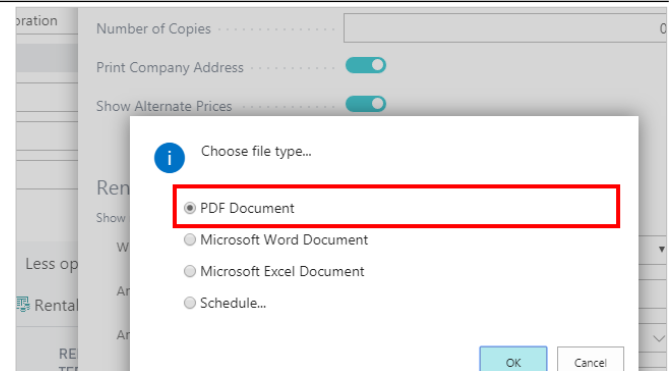
The contract a well can be previewed.
Click on the button **Send to...**



Click on the item **PDF Document**

In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.

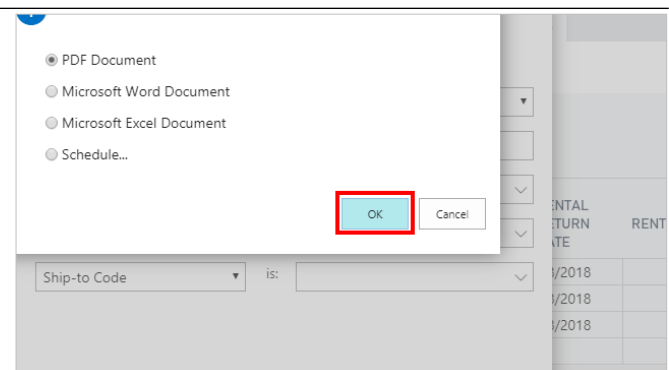
Then select the OK button.



When PDF document is selected and OK is clicked on, then the file for the pdf document will show at the bottom left on the window.

Click on the file to open the pdf file. On the open file save the contract to the location where the document is to be saved to or print the file, if applicable.

Click on the button **OK**



Below is an example of the Rental Contract document for this contract.



CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Sell

To:

Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Ship

To:

Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Rental Contract

Page: 1

Rental Contract Number:

RC00005

Rental Contract Date:

4/9/2018

P.O. Number

Customer ID

SalesPerson

10000

Peter Saddow

Ship Via

Terms

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00001	Buckeye Ditcher Group		2		
RU00002	Buckeye Ditcher	BD-002	1		1,000.00
Rental	Apr 09, 2018 to Jun 08, 2018		2 @ 500.00/Month = 1,000.00		
RU00003	Buckeye Ditcher	BD-003	1		1,000.00
Rental	Apr 09, 2018 to Jun 08, 2018		2 @ 500.00/Month = 1,000.00		

Amount Subject to Sales Tax

2,000.00

Amount Exempt from Sales Tax

0.00

Subtotal:

2,000.00

Total Sales Tax:

40.00

Total:

2,040.00

3.4.4.5. Shipping the Rental Units

Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

ODT Rentals Online Help

5/15/2024

505/2540



ODT Rentals Online Help

A listing of all rental units entered, however, not shipped is provided.

NOTE: Sales lines, pending shipments are not included in the listing.

NOTE:

Should some of the rental units entered have different Rental Start Dates, then clear the Qty. to Rent on the lines that will be shipped on a later date than is in the Posting Date field on the General tab of the contract.

Otherwise all rental lines will be shipped as of the date in the Posting Date field.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00005' screen in Dynamics 365 Business Central. The 'Rental' tab is selected and highlighted with a red box. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the navigation menu item **Ship Rentals**

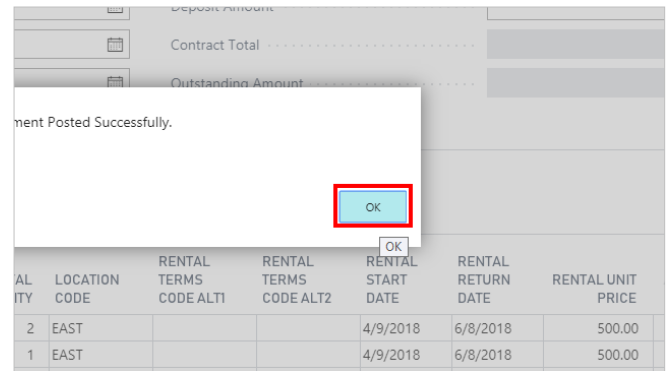
The screenshot shows the 'Rental Contract · RC00005' screen. The 'Ship Rentals' button is highlighted with a red box. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. Below the dialog box, a table is visible with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENT.

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/9/2018	6/8/2018	
1	EAST			4/9/2018	6/8/2018	

Click on the button **OK**



AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST			4/9/2018	6/8/2018	500.00
1	EAST			4/9/2018	6/8/2018	500.00

Click on the cell **Qty. on Rent** with the value **1**
Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

ALT1 RENTAL	ALT2 RENTAL	QTY. TO RENT	QTY. ON RENT	QTY. TO	QTY.
UNIT PRICE	UNIT PRICE			RETURN	RETURNED
0.00	0.00	0	0	0	0
0.00	0.00	0	1	0	0
0.00	0.00	0	1	0	0

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

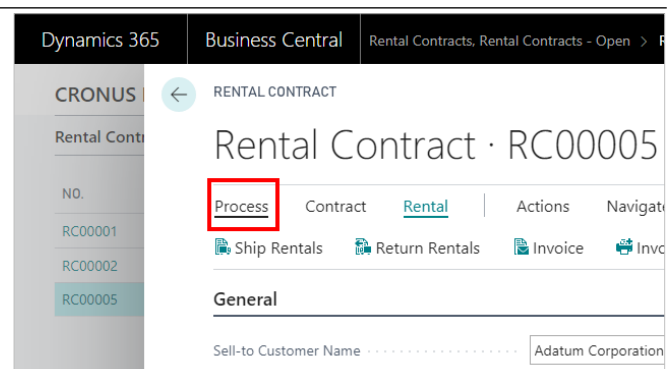
3.4.4.6. Printing or Previewing the Proforma Invoice

The Proforma Invoice is a pre-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

NOTE:

The Proforma will only print the details for those rental units which have been shipped.

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open > R

CRONUS RENTAL CONTRACT

Rental Contract · RC00005

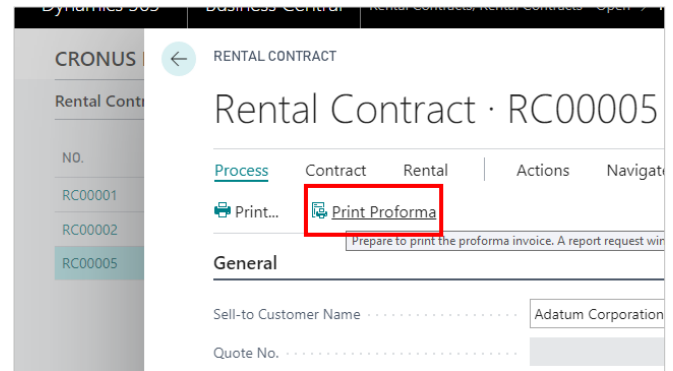
Process Contract Rental Actions Navigat

Ship Rentals Return Rentals Invoice Invc

General

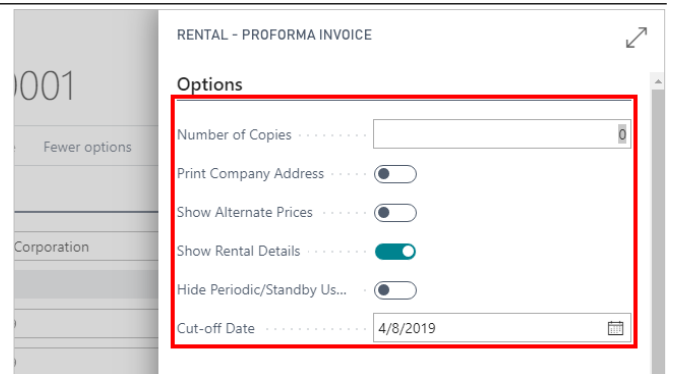
Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Print Proforma**



The screenshot shows the 'RENTAL CONTRACT' screen for contract RC00005. The 'Process' tab is active, and the 'Print Proforma' button is highlighted with a red box. Below the button, a message states: 'Prepare to print the proforma invoice. A report request will be generated.' The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.

Option tab fields when printing the Proforma Invoice



The screenshot shows the 'RENTAL - PROFORMA INVOICE' screen with the 'Options' tab selected. The 'Options' section is highlighted with a red box and contains the following fields: 'Number of Copies' (set to 0), 'Print Company Address' (toggle on), 'Show Alternate Prices' (toggle on), 'Show Rental Details' (toggle on), 'Hide Periodic/Standby Us...' (toggle on), and 'Cut-off Date' (set to 4/8/2019).

For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

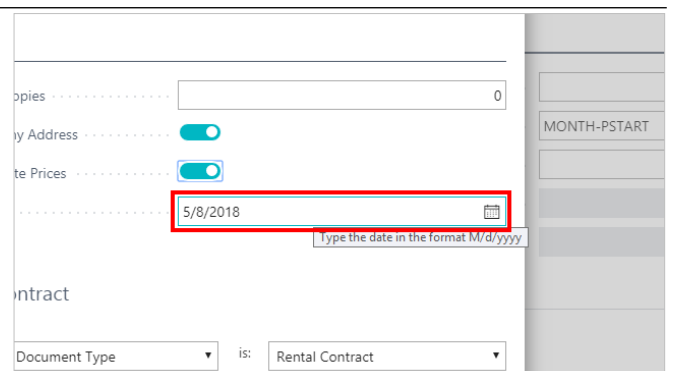
Click on the field **Cut-off Date**

In this example the date displayed is not the Billing Date for the first invoice as Proforma Invoices from other contracts have been previewed and the date is saved.

If the date displayed is not equal to or later than the Billing Date for the first invoice, then select the date for which the Proforma is to print what the billing will be at that date.

NOTE:

The Billing Date in the Rental Amount lines provides the earliest date at which the invoicing can occur.



The screenshot shows the 'RENTAL - PROFORMA INVOICE' screen with the 'Options' tab selected. The 'Cut-off Date' field is highlighted with a red box and contains the date '5/8/2018'. A tooltip below the field reads: 'Type the date in the format M/d/yyyy'. The 'Document Type' is set to 'Rental Contract'.

The users' Work Date in My Settings, automatically defaults to the Cut-off Date field until the first time the Print Proforma is ran.

Then this date is saved in the page and must be updated when subsequently running the Print Proforma.

This can be overridden to specify what Cut-off Date for the Proforma Invoice should print the billing up to.

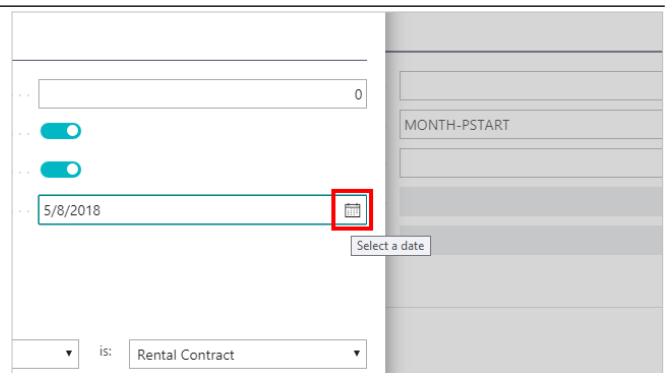
ODT Rentals Online Help

When on Rental Management Setup, the field, Default Blank Return Date is not checked, then the Cut-off Date entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

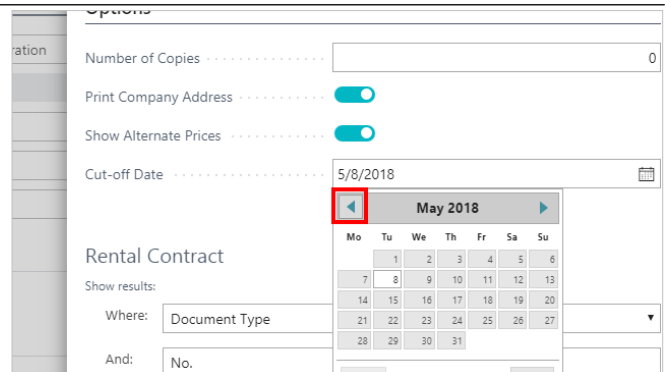
When the Rental Management Setup field, Default Blank Return Date is checked, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Line(s) which have been invoiced and are marked as Billed. The Proforma prints based only on full rental periods.

Should a date be entered that is earlier than the Billing Date on the Rental Amount line, then a message "Nothing to Invoice" will be displayed.

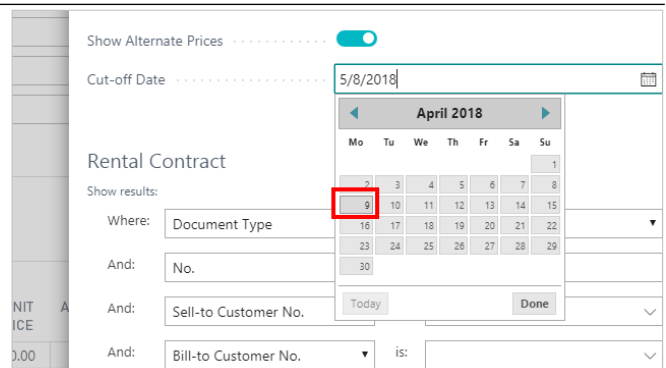
Click on the link



Click on the link **Previous**



Click on a date in the calendar





ODT Rentals Online Help

Click on the button **Preview**

The Proforma Invoice can be Sent to PDF, Printed or Previewed.

-to Customer No. ▾

is: ▾

p-to Code ▾

is: ▾

Send to...

Print

Preview

Cancel

Preview

NTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	DISC
0		0.00	*	0.00	0.00	

Below is an example of the Proforma Invoice for this contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Proforma Invoice			
		Page: 1			
		Rental Contract Number:		RC00005	
		Rental Proforma Date:		4/9/2018	
Sell		Ship			
To: Adatum Corporation		To: Adatum Corporation		P.O. Number	
Robert Townes		Robert Townes		Customer ID 10000	
192 Market Square		192 Market Square		SalesPerson Peter Sadow	
Atlanta, GA 31772		Atlanta, GA 31772			
		Ship Via			
		Terms			
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002	Buckeye Ditcher	BD-002	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
RU00003	Buckeye Ditcher	BD-003	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Amount Subject to Sales Tax 1,000.00				Subtotal:	1,000.00
Amount Exempt from Sales Tax 0.00				Total Sales Tax:	20.00
				Total:	1,020.00

3.4.4.7. Invoicing the Rental Contract for the First Month Rental

As this example is for billing in advance for each rental period, based on the Rental Term selected, there will be two invoices posted in the processing of this contract.



The first invoice is to be processed after the shipment of the rental units.

The Posting Date on the Contract, General tab must be equal to or later than the Billing Date on the Rental Amount record for the first rental period, when invoicing for the first month.

Click on the field **Posting Date**

The Posting Date must be equal to or later than the Billing Date that is on the first record in the Rental Amount Lines. This record contains the billing information for the first rental period.

The screenshot shows a 'Proforma' form. In the 'Posting Date' field, the date '4/9/2018' is entered and highlighted with a red rectangular box. To the right of the date field is a small text prompt: 'Type the date in the format M/d/yyyy'. Below the date field, there are two more rows, each with a date field containing '4/9/2018' and a calendar icon to its right.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract' screen for contract 'RC00005'. The 'Rental' tab in the command bar is highlighted with a red rectangular box. Other tabs visible are 'Process', 'Contract', and 'Actions'. Below the tabs, there are icons for 'Print...' and 'Print Proforma'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar options.

When using Invoice and Print, the system will used the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract. These options include Number of Copies, Print Company Address and Show Rental Details.

The screenshot shows the 'Rental Contract' screen for contract 'RC00005'. The 'Invoice' option in the 'Actions' group of the command bar is highlighted with a red rectangular box. Other options visible are 'Ship Rentals', 'Return Rentals', 'Invoice and Print', and 'Post'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.



Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE
0.00	0	0	0	0	
0.00	0	1	0	0	

Click on the button **OK**

Invoice Posted Successfully.

OK

NTAL RICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT%	RE... DAY BIL...
0.00	0	0	0	0	0	<input checked="" type="checkbox"/>
0.00	0	1	0	0	0	<input checked="" type="checkbox"/>

To review the Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.
A listing of posted invoices for the contract will be displayed.

The Posted Invoice can as well be printed from the invoice list or card.

3.4.4.8. Invoicing the Rental Contract for the Second Month Rental

As this example is for billing at the start of each rental period the contract, there will be two invoices posted in the processing of this contract.

The second invoice is to be processed at the start of the second rental period.

The Posting Date must be changed and be equal to or later than the Billing Date on the Rental Amount record for the second rental period.

Click on the field **Posting Date**

The Posting Date must be equal to or later than the Billing Date that is on the second record in the Rental Amount Lines. This record contains the billing information for the second rental period.

ct · RC00009

Adatum Corporation

4/9/2018	4/9/2018, (Alt-1) Show
4/9/2018	
4/9/2018	

RENTAL TERMS	RENTAL	LOCAT...	RENTAL TERMS	RENTAL TERMS CODE
-----------------	--------	----------	-----------------	----------------------



Click on the field **Posting Date**

Return Rentals Invoice Invoice and Print Posted Deliveries Post

Adatum Corporation

4/9/2018

4/9/2018

4/9/2018

Manage More options

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

Adatum Corporation

External Document No.

Rental Terms Code

Deposit Amount

Select a date

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

4/9/2018

April 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

ge More opti

Click on a date in the calendar

Customer Name Adatum Corporation

4/9/2018

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

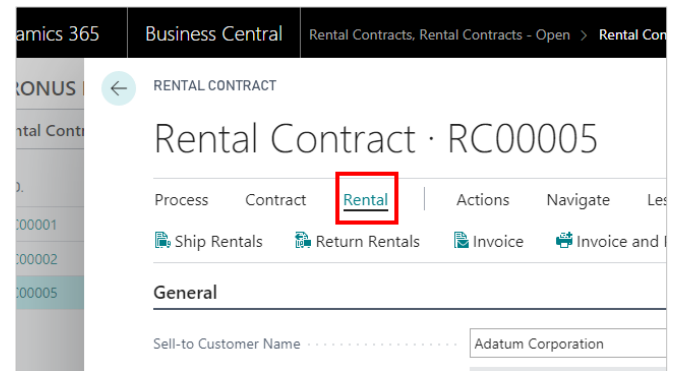
Today Done

Manage More opti

Delete Line Group

RENTAL START RENTAL RETURN RENTAL UNIT ALT1 RENTAL ALT2 RENTAL

Click on the navigation menu item popup **Rental**



Business Central | Rental Contracts, Rental Contracts - Open > Rental Contract

RENTAL CONTRACT

Rental Contract · RC00005

Process Contract **Rental** Actions Navigate Less options

Ship Rentals Return Rentals Invoice Invoice and Print

General

Sell-to Customer Name Adatum Corporation

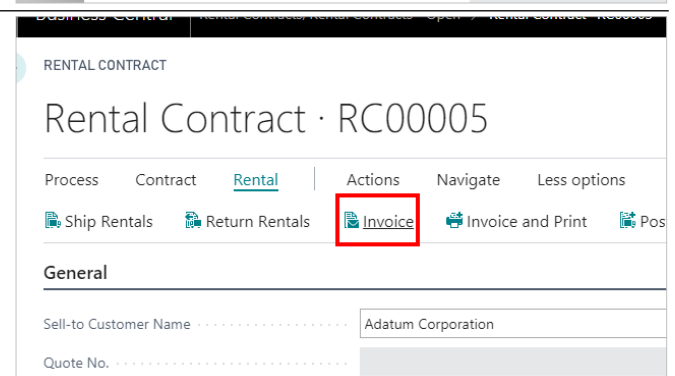
Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract.

These options include Number of Copies, Print Company Address and Show Rental Details.



Business Central | Rental Contracts, Rental Contracts - Open > Rental Contract

RENTAL CONTRACT

Rental Contract · RC00005

Process Contract Rental Actions Navigate Less options

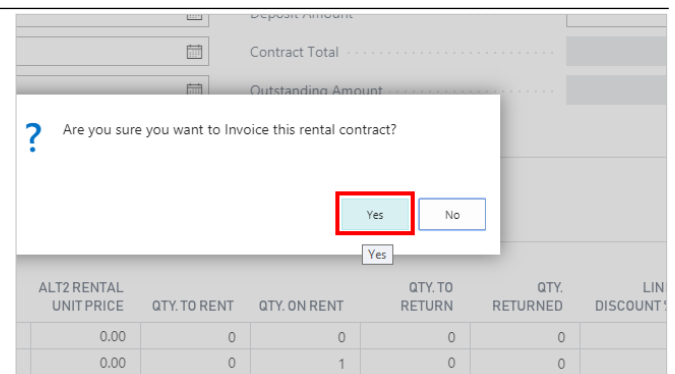
Ship Rentals Return Rentals **Invoice** Invoice and Print Post

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**



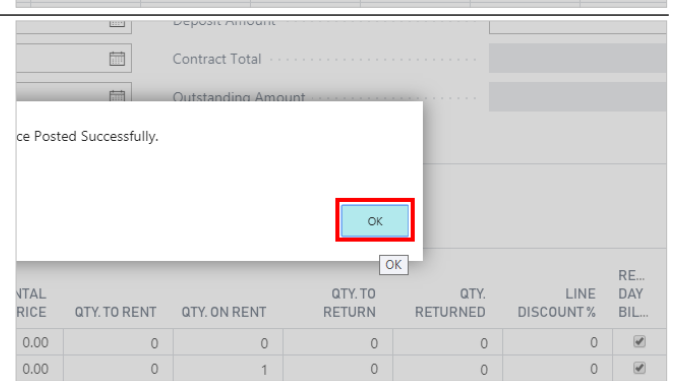
Are you sure you want to Invoice this rental contract?

Yes No

Yes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT%
0.00	0	0	0	0	
0.00	0	1	0	0	

Click on the button **OK**



Invoice Posted Successfully.

OK

OK

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT%	RE... DAY BIL...
0.00	0	0	0	0	0	☑
0.00	0	1	0	0	0	☑

To review the second Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.
A listing of posted invoices for the contract will be displayed.

Select the second invoice posted, to review the

document.

The Posted Invoice can as well be printed from the invoice list or card.

3.4.4.9. Returning the Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.

A listing of all rental units on rent is provided.

In this example, the returns are being returned on the same date as the Rental Return Date on the lines.

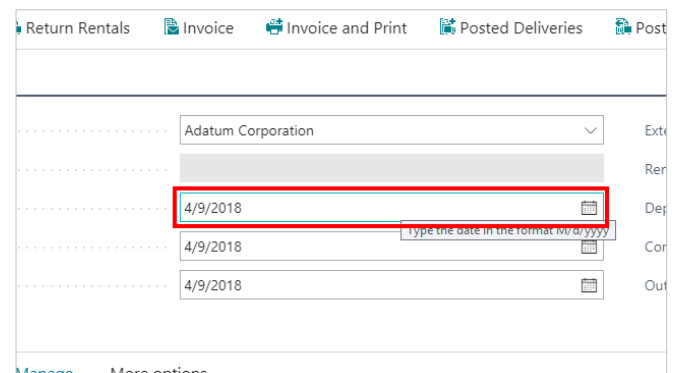
When the following steps are completed the Rental Contract will close as the contract have been fully invoiced, and will be available in the Completed Rental Contracts.

Fully invoiced means that both of the Rental Amount Line records have the Billed field checked. The Billed field is checked by the system when the rental period is invoiced.

Please see Reviewing Rentals, Completed and Posted Rental Documents in the ODT Rentals Online Help site, for information on Completed Rental Contracts.

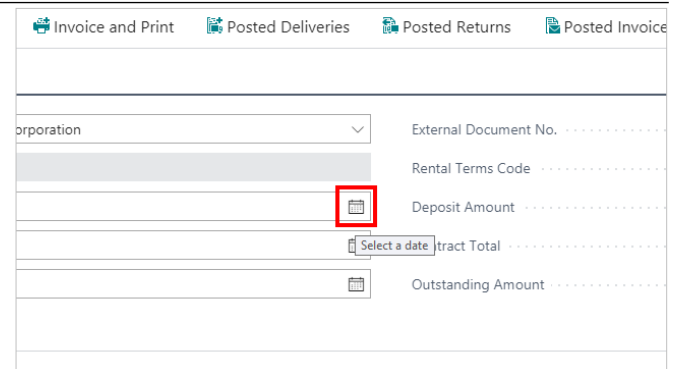
Click on the field **Posting Date**

Change the Posting Date to the date the units are returned.



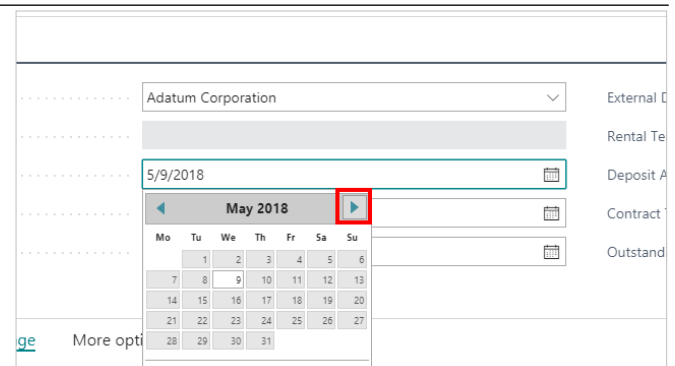
The screenshot shows the 'Return Rentals' screen with a list of rental units. The 'Posting Date' field is highlighted with a red box, and a date of 4/9/2018 is entered. A tooltip提示 'Type the date in the format m/d/yyyy' is visible next to the date field.

Click on the link



The screenshot shows the 'Invoice and Print' screen with a list of rental units. The 'Posting Date' field is highlighted with a red box, and a date of 4/9/2018 is entered. A tooltip提示 'Select a date' is visible next to the date field.

Click on the link **Next**



The screenshot shows the 'Next' screen with a list of rental units. The 'Posting Date' field is highlighted with a red box, and a date of 5/9/2018 is entered. A calendar widget is visible below the date field, showing the month of May 2018.



ODT Rentals Online Help

Click on a date in the calendar

ime Adatum Corporation

5/9/2018

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Manage More opti

Delete Line Group Today Done

RENTAL START RENTAL RETURN RENTAL UNIT ALT1 RENTAL ALT2 RENTAL

The Qty. To Return field is to be completed for each rental unit being returned.

Rental Unit group lines do not require this field to be populated.

Click on the cell **Qty. to Return**

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	0	0	0
0.00	0	1	0	0	0

Enter the text 1.

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1		0	0
0.00	0	1	0	0	0

Click on the cell **Qty. to Return** with the value 0

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	0	0	0

UNIT OF LINE AMOUNT

3.4.5. How to Process Contracts with Periodic Billing in Arrears

Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

The following example demonstrates the creation and processing of a contract, for the pricing schema where the customer is billed in arrears periodically for each rental period the customer has the units.

In this example, the rental will be for two rental periods.

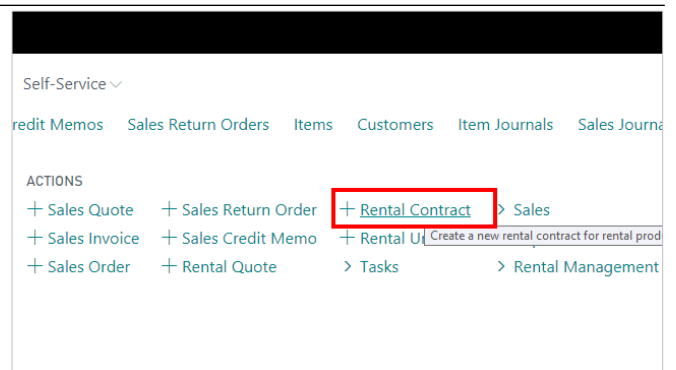
3.4.5.1. Creating a New Rental Contract for Periodic Billing in Arrears

In this example, the Rental Contract command bar has been pinned to show the sub menu options automatically.

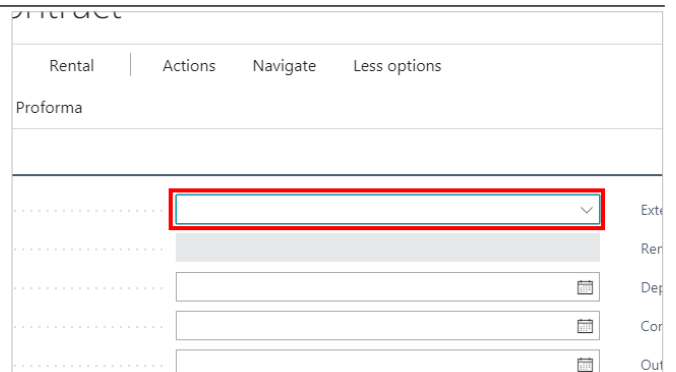
In the example provided here the rental term used is a monthly rental term for periodic billing in arrears.

The contract is for 2 months for which individual invoices will be generated each month, billing one month at a time at the end of each rental period.

Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**





ODT Rentals Online Help

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Select the Customer that the Rental Contract is for.

Print... Print Proforma

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Tracy Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

20000 Select record "10000"

Rental Lines Manage More options + New

Click on the field **External Document No.**

If the customer has provided an external document number, then enter it in this field.

Show more

MONTH-PEND

0.00

0.00

0.00

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

Show more

MONTH-PEND

0.00

0.00

0.00

Click on the field **Deposit Amount**

Should a deposit be required from the Customer, enter the amount in the Deposit Amount field.

Once the Rental Lines fields are completed the Contract Total and Outstanding Amount fields will automatically be populated.

Show more

MONTH-PEND

0.00

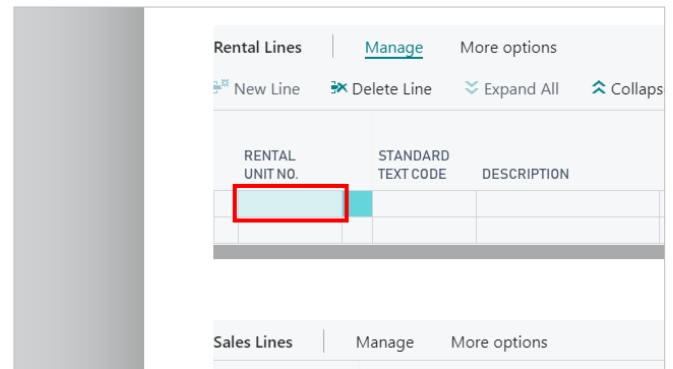
0.00

0.00

3.4.5.2. Entering a Rental Unit Group on the Rental Lines

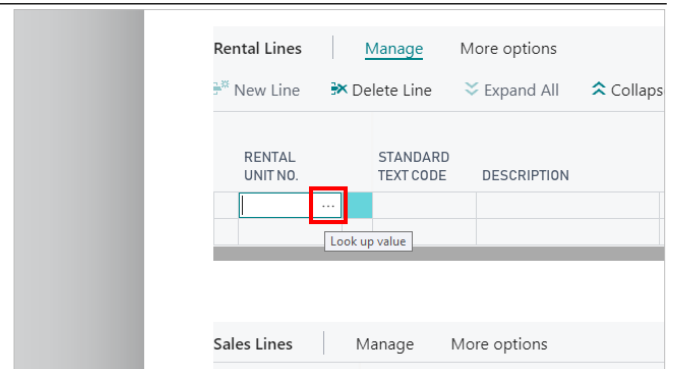
In this example, the Rental Lines command bar has been pinned to show the sub menu options automatically.

Click on the cell **Rental Unit No.**



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

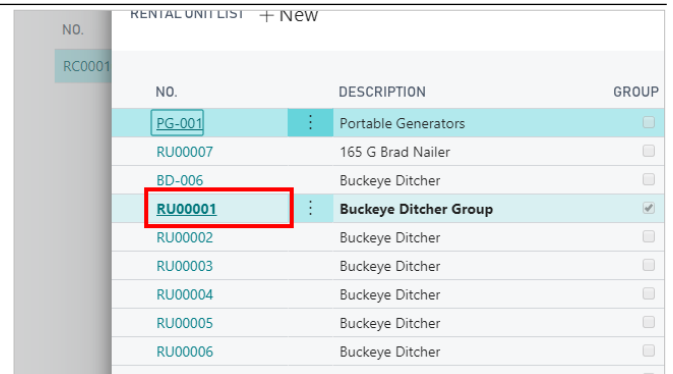
Click on the lookup button in the cell **Rental Unit No.**
lookup button



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Click on the link in cell **No.** with the value **RU00001**

Select the Rental Unit group that contains the Rental Unit you wish to rent out.



NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

To review the rental group availability, complete the following steps.

CRITICAL:

The user must move off the Rental Unit No. field prior to reviewing the Group Availability Matrix.

Should this step be missed, this could lead to the contract not being able to be closed as Rental Amount Lines will be created on the group line and these cannot be deleted or invoiced.

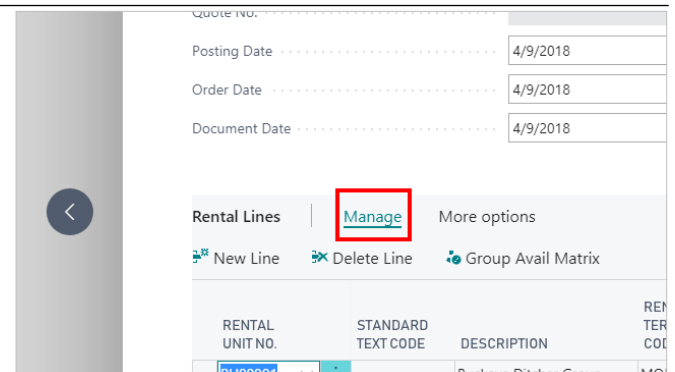
The only way to address this item is to delete the group and linked child lines and re-enter them, which would have to be done prior an invoice is posted. Once an invoice is posted, then although the child lines are fully invoiced and the units have been returned, the contract will not close.

If the units have been shipped, however not invoiced, then the Function, Undo Shipment must be ran on each child unit line.

Then the Rental Unit Group line must be deleted, which will delete the child unit lines.

After that the group must be re-entered and the units shipped, prior to invoicing.

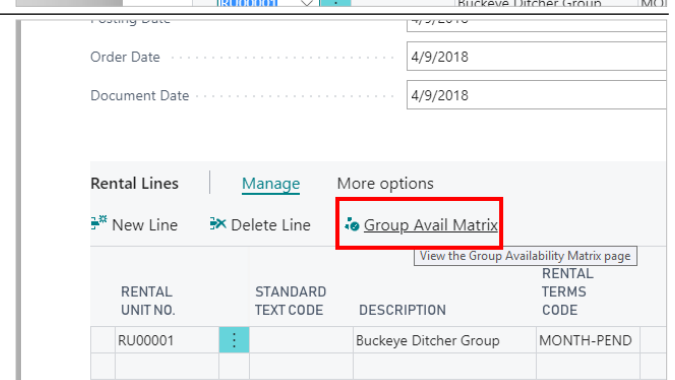
Click on the navigation menu item popup **Manage**



The screenshot shows the 'Manage' button highlighted with a red box in the 'Rental Lines' section. The button is located next to the 'More options' link. The 'Rental Lines' section also includes 'New Line', 'Delete Line', and 'Group Avail Matrix' options. Below this, a table lists rental units with columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', 'DESCRIPTION', and 'RENTAL TERMS CODE'. The first row shows 'BU00001' and 'Buckeye Ditcher Group'.

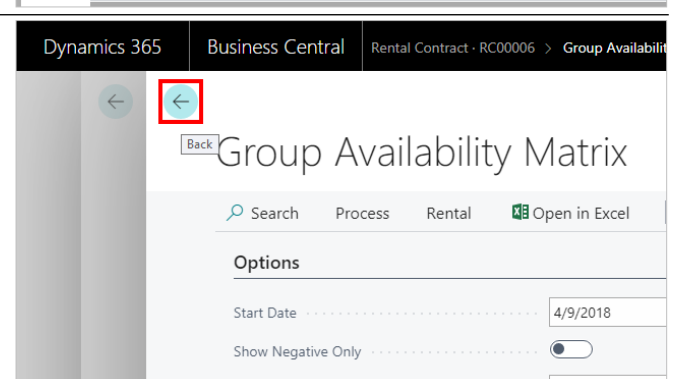
Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the ODT Rentals Online help, Processing Rentals Overview, Group Availability Matrix Overview.



The screenshot shows the 'Group Avail Matrix' button highlighted with a red box in the 'Rental Lines' section. The button is located next to the 'More options' link. The 'Rental Lines' section also includes 'New Line', 'Delete Line', and 'Group Avail Matrix' options. Below this, a table lists rental units with columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', 'DESCRIPTION', and 'RENTAL TERMS CODE'. The first row shows 'RU00001' and 'Buckeye Ditcher Group'.

Click on the back button



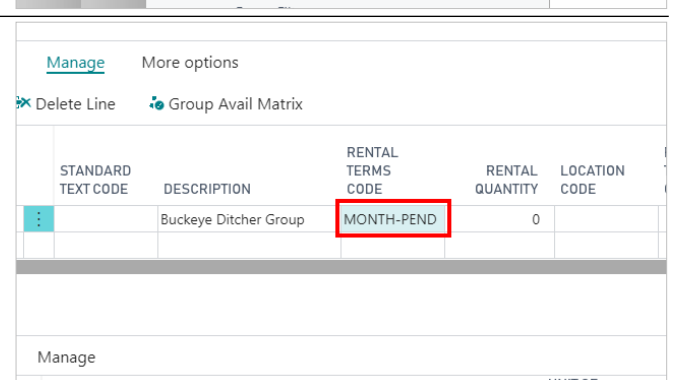
The screenshot shows the 'Group Availability Matrix' page. The 'Back' button is highlighted with a red box. The page includes a search bar, 'Process', 'Rental', and 'Open in Excel' options. Below this, there are 'Options' for 'Start Date' (4/9/2018) and 'Show Negative Only' (toggle). The page title is 'Group Availability Matrix'.

Click on the cell **Rental Terms Code**

The Rental Term Code field will automatically populated from the Rental Unit Group card as the field, Use Rental Unit Terms, has been checked on Rental Management Setup,

As the Rental Term setup on the Rental Unit Group is a periodic billing in arrears rental term, the rental term does not need to be changed.

Should the Rental Term on the Rental Line not be a must be a periodic billing in arrears rental term, then the rental term will need to be changed by looking up and selecting the appropriate term.



The screenshot shows the 'Rental Terms Code' field highlighted with a red box in the 'Group Availability Matrix' table. The table has columns for 'STANDARD TEXT CODE', 'DESCRIPTION', 'RENTAL TERMS CODE', 'RENTAL QUANTITY', and 'LOCATION CODE'. The first row shows 'BU00001', 'Buckeye Ditcher Group', 'MONTH-PEND', '0', and an empty location code. Below the table, there is a 'Manage' button and a 'UNIT OF' field.



Click on the cell **Rental Quantity**

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Buckeye Ditcher Group	MONTH-P	0		

UNIT OF

Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Buckeye Ditcher Group	MONTH-PEND	2		

UNIT OF

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Buckeye Ditcher Group	MONTH-PEND	2				4/9/2018

UNIT OF

Click on **Code = EAST, Name = East Warehouse**

Select the location from which the rental will occur.

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Buckeye Ditcher Group	MONTH-PEND	2				4/9/2018

LOCATION CODE

QUANTITY

MEASURE

UNIT PRICE

EXCL. TAX

TAX GROUP

CODE

AT

EX

CODE

NAME

EAST

East Warehouse

RENTRESERV

Inventory Items Rev

WEST

West Warehouse

+ New



Click on the cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
✓		4/9/2018	5/8/2018	500.00	0.00	0.00	
Type the date in the format M/d/yyyy							
LINE AMOUNT							

Click on the link in cell **Rental Return Date**

For this example, the Rental Return Date has to be changed to reflect the rental is for 2 months by following the next steps.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
		4/9/2018	5/8/2018	500.00	0.00	0.00	
Select a date							
LINE AMOUNT							

Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
4/9/2018	5/8/2018	500.00	0.00	0.00	
May 2018					
Mo Tu We Th Fr Sa Su					
1 2 3 4 5 6					
7 8 9 10 11 12 13					
14 15 16 17 18 19 20					
21 22 23 24 25 26 27					
28 29 30 31					
Next					
LIN AMOUNT					
QUANTITY					

Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018	5/8/2018	500.00	0.00	0.00	
June 2018						
Mo Tu We Th Fr Sa Su						
1 2 3						
4 5 6 7 8 9 10						
11 12 13 14 15 16 17						
18 19 20 21 22 23 24						
25 26 27 28 29 30						
Today Done						
QTY. TO SHIP QUANTITY SHIPPED						
0.00 0.00 0 0 0						



Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	500.00	0.00	0.00
LINE AMOUNT					

As a group has been entered on the rental line, the additional child rental lines will automatically be created, based on the Rental Quantity entered on the group line.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00001	:	Buckeye Ditcher Group		
	:	Buckeye Ditcher Group		
	:	Buckeye Ditcher Group		

Click on the lookup button in the cell **Rental Unit No.**
lookup button



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group that is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.** lookup button

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group that is to be rented.

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

The fields on the child rental lines will contain the same data as on the rental unit group record.

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings.

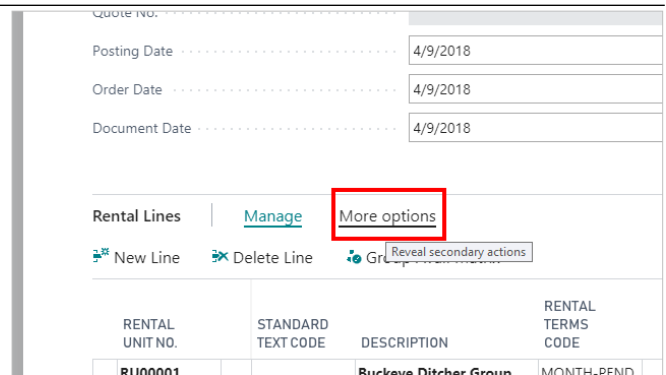
For steps on adding a single rental unit to the rental lines, please see the ODT Rentals Online help, Processing Rentals, Rental Quotes, How to Create a Rental Quote and Make Contract.

3.4.5.3. Reviewing the Rental Amount Lines

Review the Rental Amount Lines for each of the child Rental Lines to verify the expected rental billing, including the amounts and the Billing Date.

Select one of the child Rental Lines.

Click on the navigation menu item **More options**



Quote No.: [blank]

Posting Date 4/9/2018

Order Date 4/9/2018

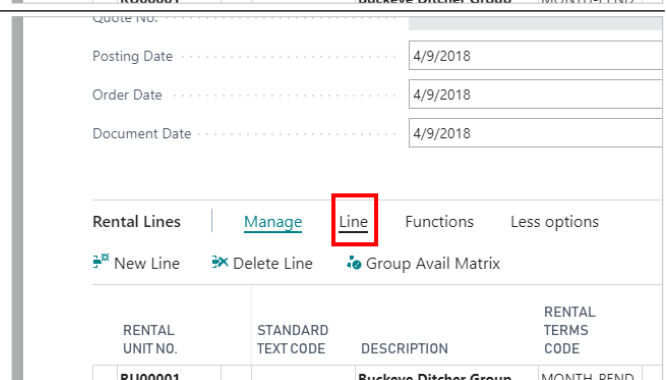
Document Date 4/9/2018

Rental Lines | [Manage](#) | **More options**

[New Line](#) [Delete Line](#) [Group](#) [Reveal secondary actions](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item popup **Line**



Quote No.: [blank]

Posting Date 4/9/2018

Order Date 4/9/2018

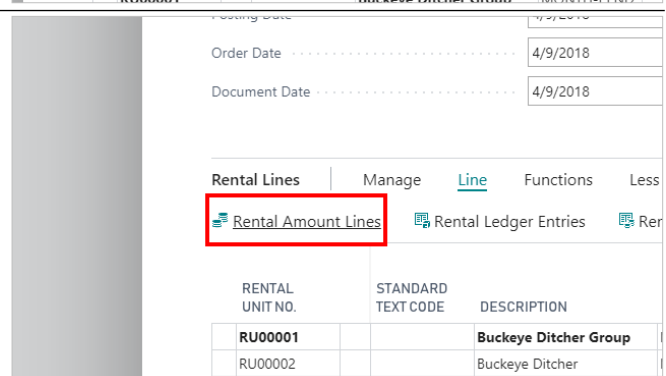
Document Date 4/9/2018

Rental Lines | [Manage](#) | **Line** | Functions | Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item **Rental Amount Lines**



Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

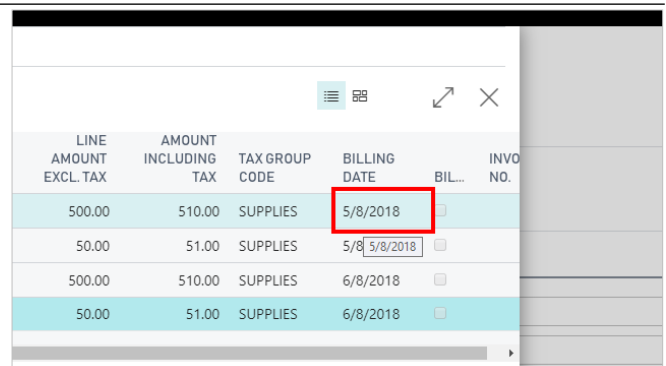
Rental Lines | [Manage](#) | [Line](#) | Functions | Less

Rental Amount Lines [Rental Ledger Entries](#) [Rental](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **5/8/2018**

Note that the Billing Date on the first Rental and Damage Waiver records are the same as the date in the Ending Date-Time field.



LINE	AMOUNT	TAX GROUP	BILLING	BIL...	INVO
AMOUNT	INCLUDING	CODE	DATE		NO.
EXCL. TAX	TAX				
500.00	510.00	SUPPLIES	5/8/2018		
50.00	51.00	SUPPLIES	5/8/2018		
500.00	510.00	SUPPLIES	6/8/2018		
50.00	51.00	SUPPLIES	6/8/2018		

Click on the cell **Billing Date** with the value **6/8/2018**

Note that the Billing Date on the second Rental and Damage Waiver records are the same as the date in the Ending Date-Time field on the second record.

LINE	AMOUNT	AMOUNT	TAX GROUP	BILLING	BIL...	INVO
AMOUNT	EXCL. TAX	INCLUDING TAX	CODE	DATE		NO.
500.00		510.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
50.00		51.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
500.00		510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
50.00		51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Click on the button **Close**

510.00		SUPPLIES	5/8/2018	<input type="checkbox"/>	
51.00		SUPPLIES	5/8/2018	<input type="checkbox"/>	
510.00		SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00		SUPPLIES	6/8/2018	<input type="checkbox"/>	

3.4.5.4.

Printing the Rental Contract

The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**

Dynamics 365
Business Central
Rental Contracts, Rental Contracts - Open > P

CRONUS
Rental Contr
NO. RC00006

RENTAL CONTRACT
Rental Contract · RC00006

Process
Contract
Rental
Actions
Navigat

Print...
Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Print...**

Dynamics 365
Business Central
Rental Contracts, Rental Contracts - Open > P

CRONUS
Rental Contr
NO. RC00006

RENTAL CONTRACT
Rental Contract · RC00006

Process
Contract
Rental
Actions
Navigat

Print...
Print Proforma

General

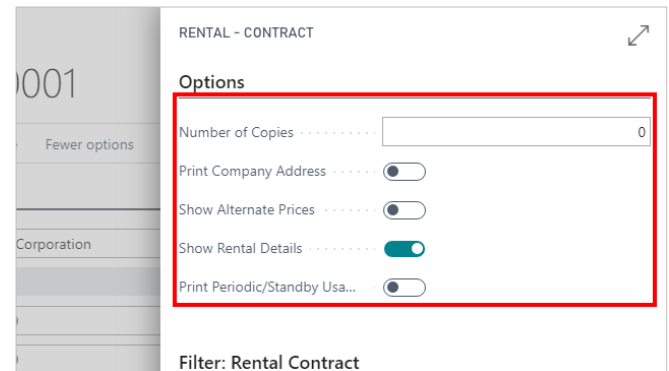
Sell-to Customer Name Adatum Corporation

Quote No.

Options tab

For information on the printing request page, Option tab fields, point to the field name.

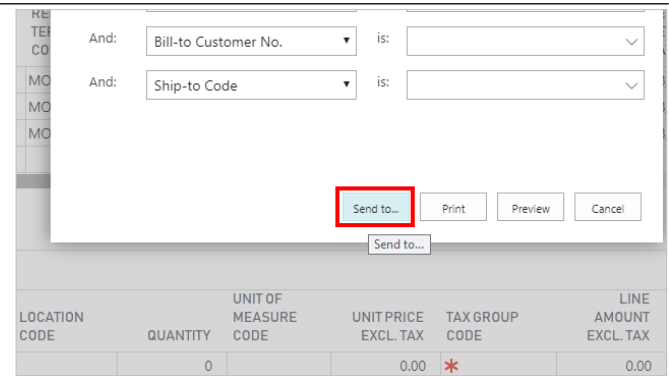
For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.



Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print.

The contract can be previewed as well. Click on the button **Send to...**

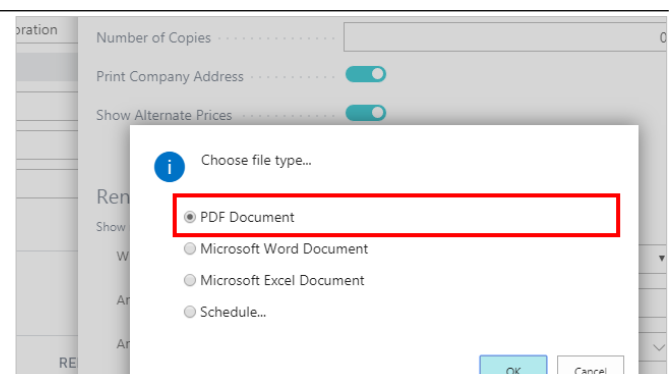
In the page that opens, PDF is selected by default, as this is the only type to be used for Rental documents.



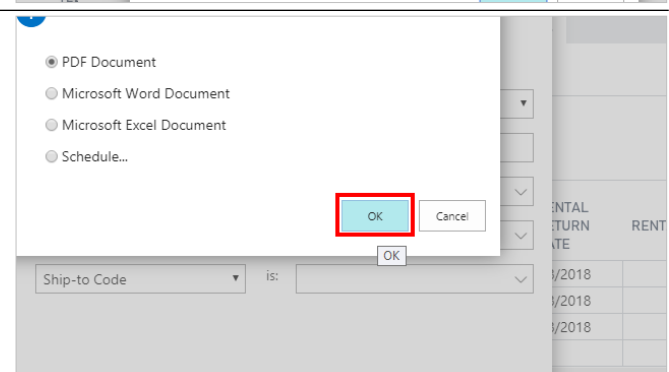
When PDF document is selected and OK is clicked on, then the file for the pdf document will show at the bottom left on the window.

Click on the file to open the pdf file. On the open file save the contract to the location where the document is to be saved to or print the file, if applicable.

Click on the item **PDF Document**



Click on the button **OK**





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Below is an example of the Rental Contract document for this contract.

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Rental Contract
Page: 1
Rental Contract Number: RCD00006
Rental Contract Date: 4/9/2018

Sell To:
Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Ship To:
Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

P.O. Number
Customer ID: 10000
SalesPerson: Peter Sadowski
Ship Via
Terms

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00001	Buckeye Ditcher Group	BD-002	2		
RU00002	Buckeye Ditcher		1		
Rental	Apr 09, 2018 to Jun 08, 2018		2 @ 500.00/Month = 1,000.00		1,100.00
Damage Waiver	Apr 09, 2018 to Jun 08, 2018		2 @ 50.00/Month = 100.00		
RU00003	Buckeye Ditcher	BD-003	1		
Rental	Apr 09, 2018 to Jun 08, 2018		2 @ 500.00/Month = 1,000.00		1,100.00
Damage Waiver	Apr 09, 2018 to Jun 08, 2018		2 @ 50.00/Month = 100.00		
Amount Subject to Sales Tax: 2,200.00				Subtotal:	2,200.00
Amount Exempt from Sales Tax: 0.00				Total Sales Tax:	44.00
				Total:	2,244.00

3.4.5.5. Shipping the Rental Units

Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

A listing of all rental units entered, however, not shipped is provided.

NOTE: Sales lines, pending shipments are not included in the listing.

NOTE:

Should some of the rental units entered have different Rental Start Dates, then clear the Qty. to Rent on the lines that will be shipped on a later date than is in the Posting Date field on the General tab of the contract.

Otherwise all rental lines will be shipped as of the date in the Posting Date field.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the shipment is occurring on.

Proforma

Adatum Corporation

4/9/2018

4/9/2018

4/9/2018

Type the date in the format M/d/yyyy

Manage More options



Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract' screen for contract RC00006. The 'Rental' menu item is highlighted in a red box. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'Rental Contract' screen for contract RC00006. The 'Ship Rentals' menu item is highlighted in a red box. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted in a red box. Below the dialog box, a table shows rental lines with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE.

Click on the button **OK**

The screenshot shows a confirmation dialog box with the text 'Shipment Posted Successfully.'. The 'OK' button is highlighted in a red box. Below the dialog box, a table shows rental lines with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE.

Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

3.4.5.6. Printing or Previewing the Proforma Invoice

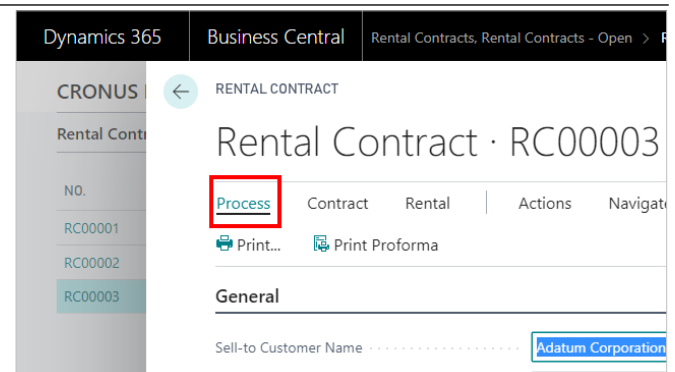
The Proforma Invoice is a pre-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

NOTE:

The Proforma will only print the details for those rental units which have been shipped.

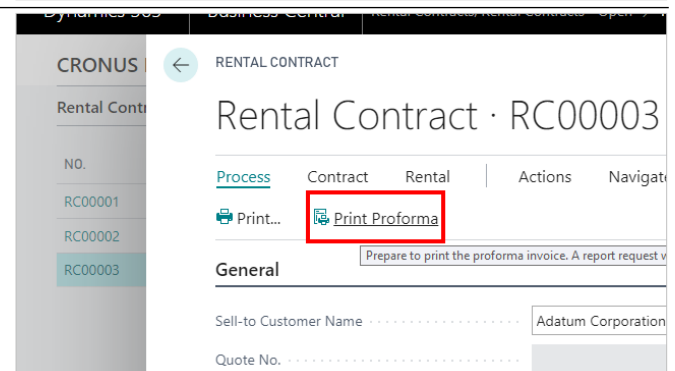
The following example is for printing of the Proforma Invoice prior to posting the first invoice.

Click on the navigation menu item popup **Process**



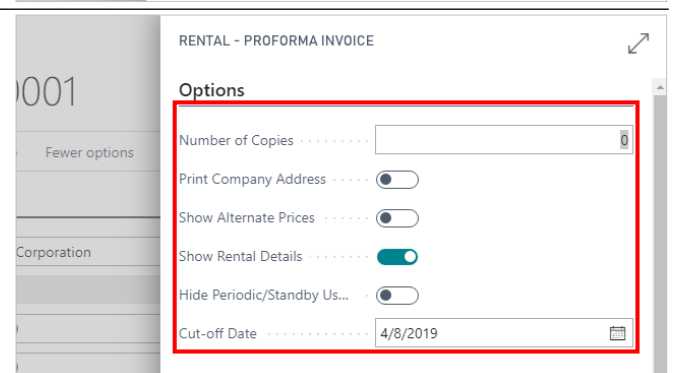
The screenshot shows the Dynamics 365 Business Central interface for a Rental Contract (RC00003). The 'Process' button is highlighted with a red box. Other buttons visible include 'Print...', 'Print Proforma', 'Contract', 'Rental', 'Actions', and 'Navigate'.

Click on the navigation menu item **Print Proforma**



The screenshot shows the Dynamics 365 Business Central interface for a Rental Contract (RC00003). The 'Print Proforma' button is highlighted with a red box. Other buttons visible include 'Process', 'Contract', 'Rental', 'Actions', and 'Navigate'.

Option tab fields when printing the Proforma Invoice

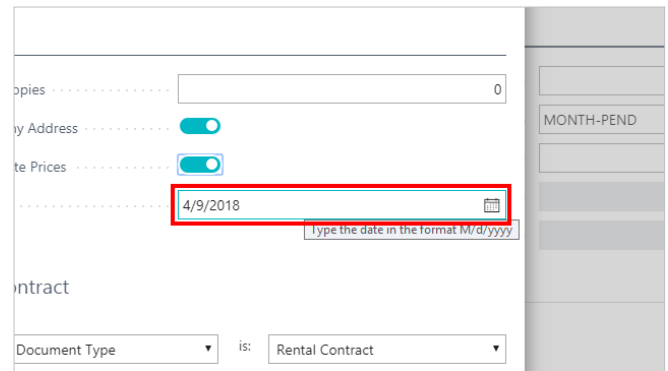


The screenshot shows the Dynamics 365 Business Central interface for a Rental - Proforma Invoice. The 'Options' tab is selected, and the 'Print Proforma' button is highlighted with a red box. Other fields visible include 'Number of Copies', 'Print Company Address', 'Show Alternate Prices', 'Show Rental Details', 'Hide Periodic/Standby Us...', and 'Cut-off Date'.

For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

Click on the field **Cut-off Date**



The users' Work Date in My Settings, automatically defaults to the Cut-off Date until the first time the Print Proforma is ran.

Then the date that was entered in this field the last time the Print Proforma was ran, is saved in the page and must be updated when subsequently running the Print Proforma.

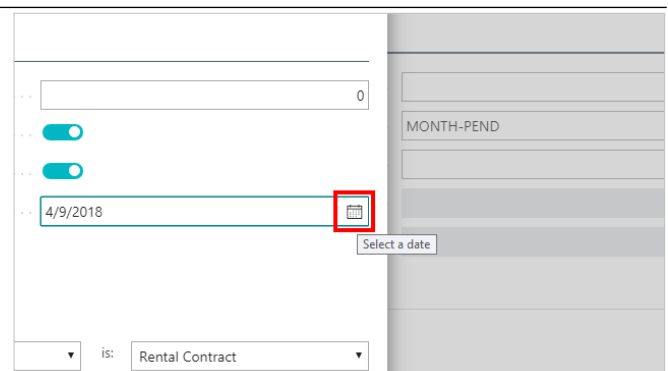
This can be overridden to specify what Cut-off Date the Proforma Invoice should print the billing up to.

When on Rental Management Setup, the field, Default Blank Return Date is set to No, then the Cut-off Date entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

When the Rental Management Setup field, Default Blank Return Date is set to Yes, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Line(s) which have been invoiced and are marked as Billed. The Proforma prints based only on full rental periods.

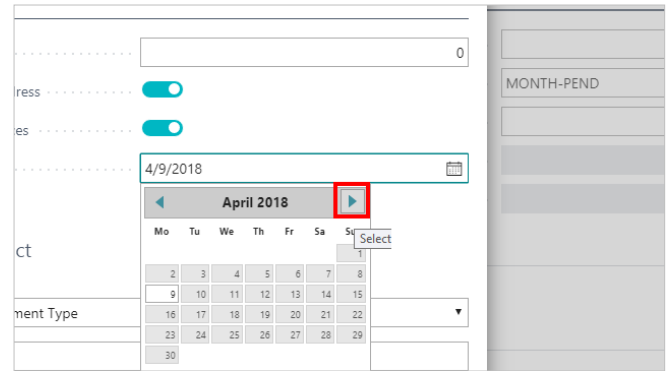
Should a date be entered that is earlier than the Billing Date on the Rental Amount line, then a message "Nothing to Invoice" will be displayed.

Click on the link



ODT Rentals Online Help

Click on the link **Next**

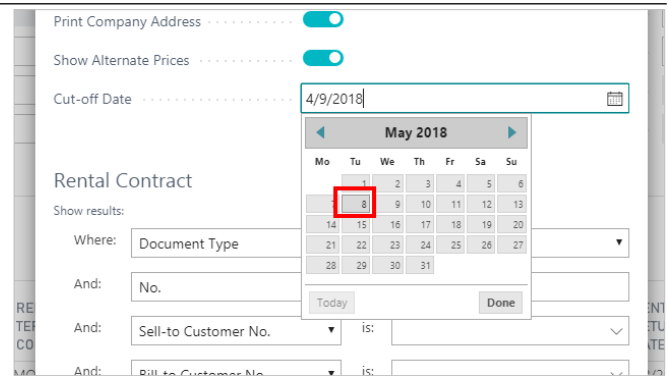


Click on a date in the calendar

Select a date that is equal to or later than the Billing Date in the Rental Amount Lines for the first rental period.

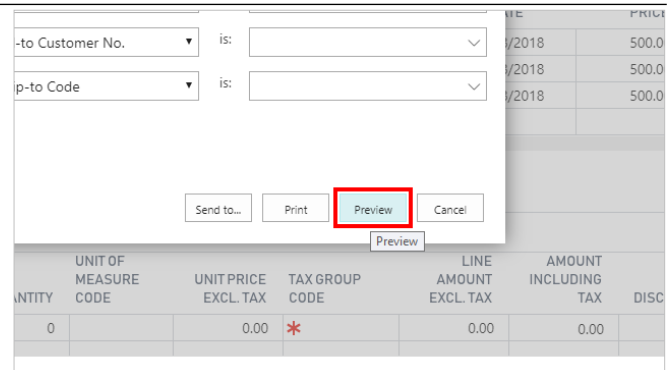
NOTE:

When running the Proforma for the second rental period, then enter a date equal to or later than the Billing Date in the Rental Amount Lines for the second rental period.



Click on the button **Preview**

The Proforma Invoice can be Sent to PDF, Printed or Previewed.



UNIT OF MEASURE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	DISC
0	0.00	*	0.00	0.00	

Below is an example of the Proforma Invoice for the first invoice on this contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Proforma Invoice			
		Page: 1			
		Rental Contract Number:		RC00004	
		Rental Proforma Date:		5/8/2018	
Sell		Ship			
To: Adatum Corporation		To: Adatum Corporation		P.O. Number	
Robert Townes		Robert Townes		Customer ID 10000	
192 Market Square		192 Market Square		SalesPerson Peter Saddow	
Atlanta, GA 31772		Atlanta, GA 31772			
		Ship Via			
		Terms			
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002	Buckeye Ditcher	BD-002	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
RU00003	Buckeye Ditcher	BD-003	1		500.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Amount Subject to Sales Tax				1,000.00	
Amount Exempt from Sales Tax				0.00	
Subtotal:					1,000.00
Total Sales Tax:					20.00
Total:					1,020.00

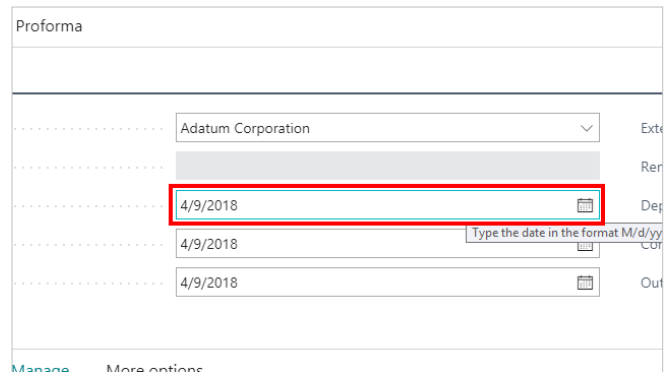
3.4.5.7. Invoicing the Rental Contract for the First Month Rental

As this example is for billing at the end of each rental period, there will be two invoices posted in the processing of this contract.

Click on the field **Posting Date**

The Posting Date on the Contract, General tab must be equal to or later than the Billing Date on the Rental Amount record for the first rental period when invoicing for the first invoice.

Therefore, will need to be changed using the following steps.



Proforma

Adatum Corporation

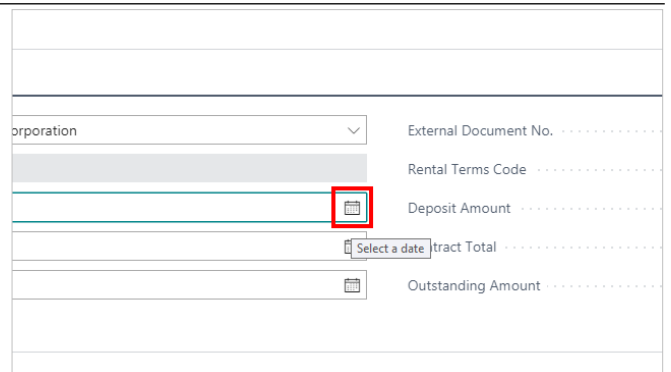
4/9/2018

4/9/2018

4/9/2018

Manage More options

Click on the link



Adatum Corporation

External Document No.

Rental Terms Code

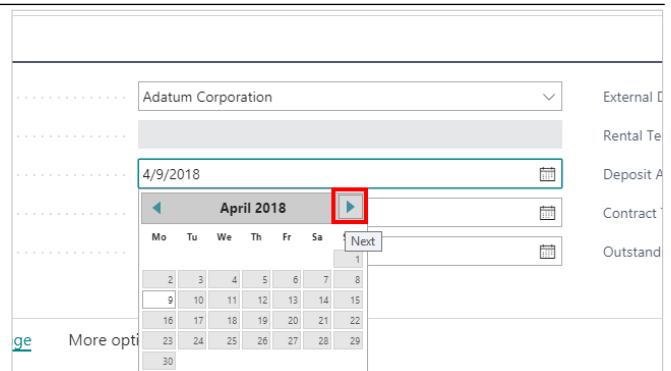
Deposit Amount

Select a date

Contract Total

Outstanding Amount

Click on the link **Next**



Adatum Corporation

4/9/2018

April 2018

Next

Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

ge More opti

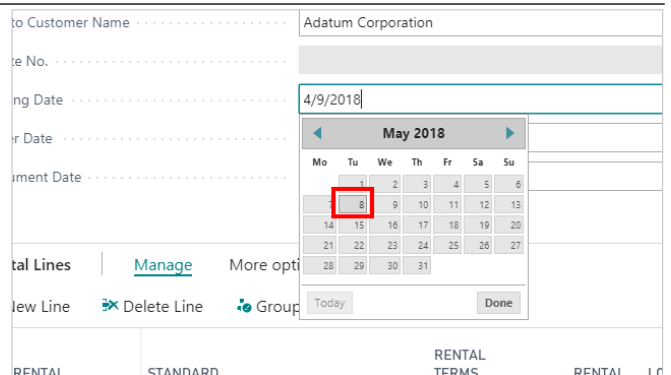
Click on a date in the calendar

Select the date that the first rental period is to be invoiced.

This date cannot be earlier than the Billing Date in the Rental Amount Lines. It must match or be later than the Billing Date on the Rental Amount Line for the first rental period.

NOTE:

The Posting Date can as well be a date later than the Billing Date, should circumstances require the posting date be the actual date the invoicing is to be posted. If the Posting Date is later than any subsequent Rental Amount Lines – Billing Dates these will be invoiced as well.



to Customer Name Adatum Corporation

ge No.

ing Date 4/9/2018

r Date

ment Date

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Today Done

tal Lines Manage More opti

ew Line Delete Line Group

RENTAL STANDARD RENTAL TERMS RENTAL LO



Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00006' screen. The navigation bar at the top includes 'amics 365', 'Business Central', and 'Rental Contract · RC00006'. Below the navigation bar, there is a 'RENTAL CONTRACT' section with a back arrow. The main title is 'Rental Contract · RC00006'. Below the title, there is a command bar with 'Process', 'Contract', 'Rental' (highlighted with a red box), 'Actions', 'Navigate', and 'Less options'. Below the command bar, there are icons for 'Print...' and 'Print Proforma'. Below the icons, there is a 'General' section with a 'Sell-to Customer Name' field containing 'Adatum Corporation'.

Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract. These options include Number of Copies, Print Company Address and Show Rental Details.

The screenshot shows the 'Rental Contract · RC00006' screen. The navigation bar at the top includes 'Business Central' and 'Rental Contract · RC00006'. Below the navigation bar, there is a 'RENTAL CONTRACT' section with a back arrow. The main title is 'Rental Contract · RC00006'. Below the title, there is a command bar with 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. Below the command bar, there are icons for 'Ship Rentals', 'Return Rentals', 'Invoice' (highlighted with a red box), 'Invoice and Print', and 'Post'. Below the icons, there is a 'General' section with a 'Sell-to Customer Name' field containing 'Adatum Corporation' and a 'Quote No.' field.

Click on the button **Yes**

The screenshot shows the 'Rental Contract · RC00006' screen. The navigation bar at the top includes 'amics 365', 'Business Central', and 'Rental Contract · RC00006'. Below the navigation bar, there is a 'RENTAL CONTRACT' section with a back arrow. The main title is 'Rental Contract · RC00006'. Below the title, there is a command bar with 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. Below the command bar, there are icons for 'Ship Rentals', 'Return Rentals', 'Invoice', 'Invoice and Print', and 'Post'. Below the icons, there is a 'General' section with a 'Sell-to Customer Name' field containing 'Adatum Corporation' and a 'Quote No.' field. A dialog box is open with the question 'Are you sure you want to Invoice this rental contract?' and two buttons: 'Yes' (highlighted with a red box) and 'No'.

Click on the button **OK**

The screenshot shows the 'Rental Contract · RC00006' screen. The navigation bar at the top includes 'amics 365', 'Business Central', and 'Rental Contract · RC00006'. Below the navigation bar, there is a 'RENTAL CONTRACT' section with a back arrow. The main title is 'Rental Contract · RC00006'. Below the title, there is a command bar with 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. Below the command bar, there are icons for 'Ship Rentals', 'Return Rentals', 'Invoice', 'Invoice and Print', and 'Post'. Below the icons, there is a 'General' section with a 'Sell-to Customer Name' field containing 'Adatum Corporation' and a 'Quote No.' field. A dialog box is open with the message 'Invoice Posted Successfully.' and two buttons: 'OK' (highlighted with a red box) and 'OK'.

To review the Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option. A listing of posted invoices for the contract will be displayed.

The Posted Invoice can as well be printed from the



invoice list or card by selecting Print Rental Invoice.

The Print option from the Posted Rental Invoice will print the financial invoice which prints just the financial aspect of the invoicing. It does not show the rental units.

Below is an example of the Rental Invoice for the first invoice for this contract.



CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

RENTAL INVOICE

Page: 1

Invoice Number: R/00005

Invoice Date: 5/8/2018

Bill To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Ship To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Customer ID 10000

P.O. Number

Rental Contract No. RC00006

SalesPerson Peter Sallow

Due Date 6/8/2018

Terms 1 Month/2% 8 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002 Buckeye Ditcher		Serial No.: BD-002			550.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	Apr 09, 2018 to May 08, 2018		1 @ 50.00/Month = 50.00		
RU00003 Buckeye Ditcher		Serial No.: BD-003			550.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	Apr 09, 2018 to May 08, 2018		1 @ 50.00/Month = 50.00		

Amount Subject to Sales Tax USD	1,100.00	Subtotal:	1,100.00
Amount Exempt from Sales Tax:	0.00		
		Total Sales Tax	22.00
		Total USD:	1,122.00

3.4.5.8. Invoicing the Rental Contract for the Second Month Rental

As this example is for billing at the end of each rental period, there will be two invoices posted in the



processing of this contract.

The second invoice is to be processed at the end of the second rental period.

Click on the field **Posting Date**

The Posting Date must be equal to or later than the Billing Date that is on the second record in the Rental Amount Lines. This record contains the billing information for the second rental period.

Therefore, the Posting Date must be changed using the following steps.

Return Rentals Invoice Invoice and Print Posted Deliveries Post

Adatum Corporation

5/8/2018

4/9/2018

5/8/2018

Manage More options

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

Adatum Corporation

5/8/2018

4/9/2018

5/8/2018

Manage More options

Click on the link **Next**

Adatum Corporation

5/8/2018

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Next

Manage More options

Click on a date in the calendar

Select the date that the second rental period is to be invoiced.

This date cannot be earlier than the Billing Date in the Rental Amount Lines. It must match or be later than the Billing Date on the Rental Amount Line for the first rental period.

NOTE:

The Posting Date can as well be a date later than the Billing Date, should circumstances require the posting date be the actual date the invoicing is to be posted. If the Posting Date is later than any subsequent Rental Amount Lines – Billing Dates these will be invoiced as well.

Adatum Corporation

5/8/2018

June 2018

Mo Tu We Th Fr Sa Su

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

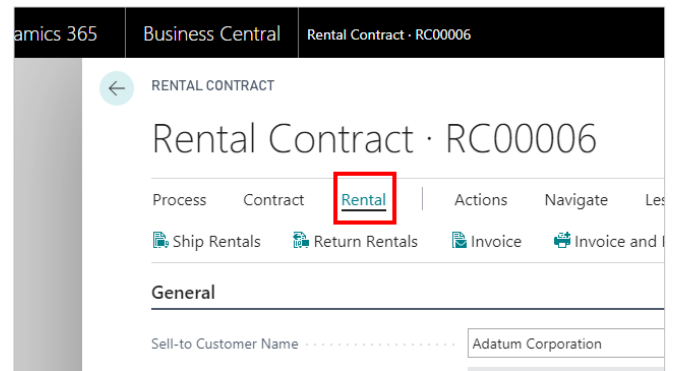
Today Done

Manage More options

Delete Line Group

STANDARD RENTAL TERMS RENTAL LOCATION

Click on the navigation menu item popup **Rental**



Business Central | Rental Contract · RC00006

RENTAL CONTRACT

Rental Contract · RC00006

Process Contract **Rental** Actions Navigate Les

Ship Rentals Return Rentals Invoice Invoice and I

General

Sell-to Customer Name Adatum Corporation

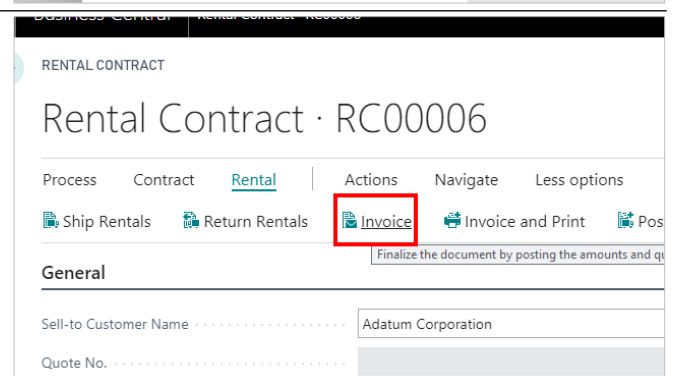
Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract.

These options include Number of Copies, Print Company Address and Show Rental Details.



Business Central | Rental Contract · RC00006

RENTAL CONTRACT

Rental Contract · RC00006

Process Contract Rental Actions Navigate Less options

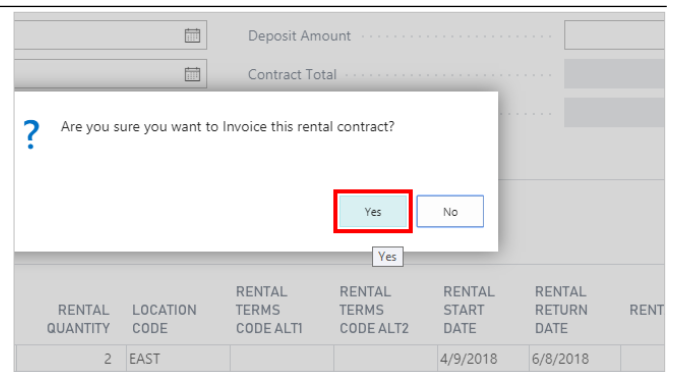
Ship Rentals Return Rentals **Invoice** Invoice and Print Pos

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**



Deposit Amount Contract Total

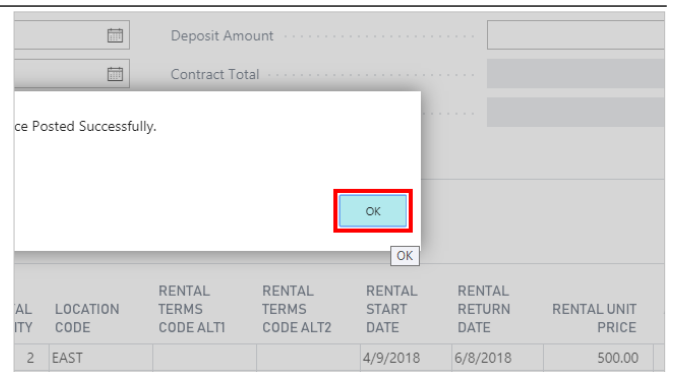
? Are you sure you want to Invoice this rental contract?

Yes No

Yes

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/9/2018	6/8/2018	

Click on the button **OK**



Deposit Amount Contract Total

Invoice Posted Successfully.

OK

OK

AL	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018	6/8/2018	500.00

To review the second Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.
A listing of posted invoices for the contract will be displayed.

Select the second invoice posted, to review the



document.

The Posted Invoice can as well be printed from the invoice list or card by selecting Print Rental Invoice.

The Print option from the Posted Rental Invoice will print the financial invoice which prints just the financial aspect of the invoicing. It does not show the rental units.

Below is an example of the Rental Invoice for the second invoice for this contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		RENTAL INVOICE Page: 1	
		Invoice Number:	RI00006
		Invoice Date:	6/8/2018
Bill To:	Ship To:	Customer ID:	10000
Adatum Corporation	Adatum Corporation	P.O. Number:	
Robert Townes	Robert Townes	Rental Contract No.:	RC00006
192 Market Square	192 Market Square	SalesPerson:	Peter Saddow
Atlanta, GA 31772	Atlanta, GA 31772		
USA	USA	Due Date:	7/8/2018
		Terms:	1 Month/2% 8 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002 - Buckeye Ditcher		Serial No.:	BD-002		550.00
Rental	May 09, 2018 to Jun 08, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	May 09, 2018 to Jun 08, 2018		1 @ 50.00/Month = 50.00		
RU00003 - Buckeye Ditcher		Serial No.:	BD-003		550.00
Rental	May 09, 2018 to Jun 08, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	May 09, 2018 to Jun 08, 2018		1 @ 50.00/Month = 50.00		

Amount Subject to Sales Tax USD	1,100.00	Subtotal:	1,100.00
Amount Exempt from Sales Tax	0.00		
		Total Sales Tax	22.00
		Total USD:	1,122.00

3.4.5.9. Returning the Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.



ODT Rentals Online Help

A listing of all rental units on rent is provided.

In this example, the returns are being returned on the same date as the Rental Return Date on the lines.

When the following steps are completed the Rental Contract will close as the contract have been fully invoiced, and will be available in the Completed Rental Contracts.

Fully invoiced means that both of the Rental Amount Line records have the Billed field checked. The Billed field is checked by the system when the rental period is invoiced.

Please see Reviewing Rentals, Completed and Posted Rental Documents in the ODT Rentals Online Help site, for information on Completed Rental Contracts.

Click on the field **Posting Date**

Verify the Posting Date is set to the date the rental units are being returned.

Return Rentals Invoice Invoice and Print Posted Deliveries Post

Adatum Corporation

6/8/2018

4/9/2018

6/8/2018

Type the date in the format M/d/yyyy

Click on the cell **Qty. to Return**

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	0	0	0
0.00	0	1	0	0	0
0.00	0	0	0	0	0

Enter the text 1.

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1	0	0	0

ODT Rentals Online Help

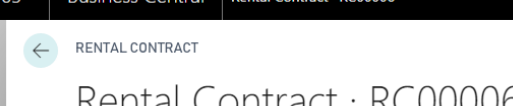
Click on the cell **Qty. to Return**

[illegible]

Enter the text **1**.

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	1	0	0
0.00	0	1		0	0
UNIT OF					LINE AMOUNT

Click on the navigation menu item popup **Rental**



amics 365 Business Central Rental Contract · RC00006

← RENTAL CONTRACT

Rental Contract · RC00006

Process Contract **Rental** Actions Navigate

Ship Rentals Return Rentals Invoice Invoice and ...

General





Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Return Rentals**

← RENTAL CONTRACT

Rental Contract · RC00006

Process Contract Rental Actions Navigate

 Ship Rentals  **Return Rentals**  Invoice  Invoice

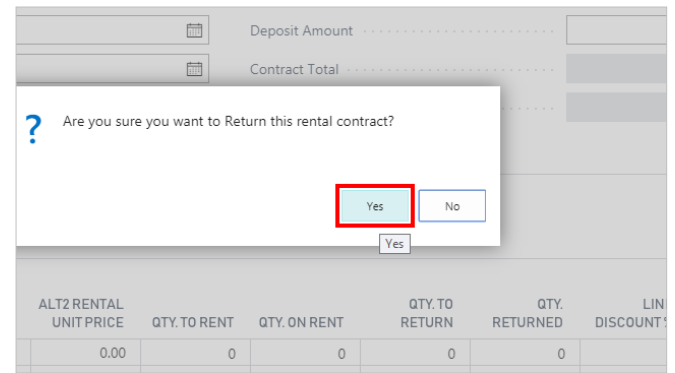
General

Post the return of the rental units on the rental line

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**



ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LIN
0.00	0	0	0	0	

The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.6. How to Process Contracts with Optimized Rental Pricing

Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

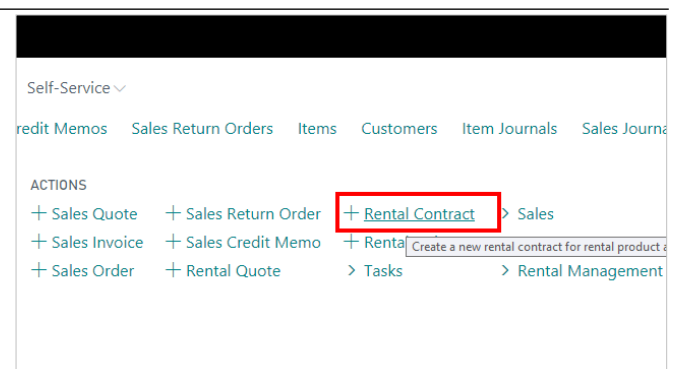
3.4.6.1. Creating a new Rental Contract for Optimized End Billing

In this example, the Rental Contract command bar has been pinned to show the sub menu options automatically.

In the example provided here, the rental term used is a monthly rental term, however, the rental duration is greater than a single month but less than 2 months.

The following example is for a rental of 1 month, 1 week and 2 days.

Click on the navigation menu item **Rental Contract**





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Click on the field **Sell-to Customer Name**

The screenshot shows the 'Proforma' form with tabs for 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Sell-to Customer Name' field is highlighted with a red box.

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Select the Customer that the Rental Contract is for.

If the customer has provided an external document number, then enter it in this field.

The screenshot shows the 'General' form with the 'Sell-to Customer Name' dropdown menu open. The option '10000' is highlighted in the list, and 'Adatum Corporation' is highlighted in the table below.

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Trey Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Click on the field **External Document No.**

If the customer has provided an external document number, then enter it in this field.

The screenshot shows the 'Rental Lines' form with the 'External Document No.' field highlighted with a red box.

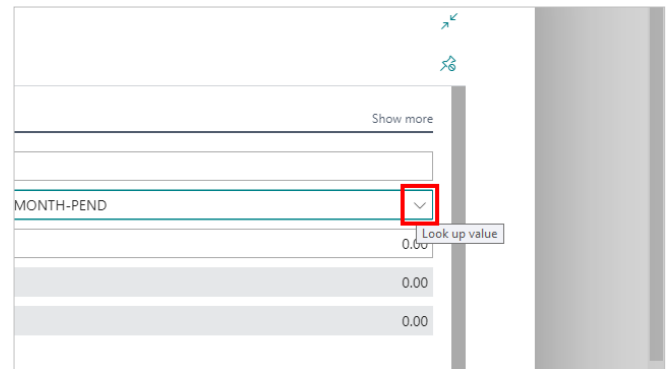
Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

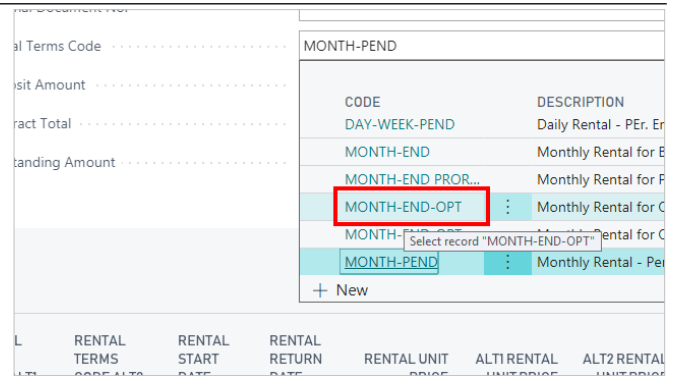
The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

The screenshot shows the 'Rental Lines' form with the 'Rental Terms Code' dropdown menu open. The option 'MONTH-PEND' is highlighted in the list.

Click on the link



Click on **Code = MONTH-END-OPT, Description = Monthly Rental for Optimized End Billing**

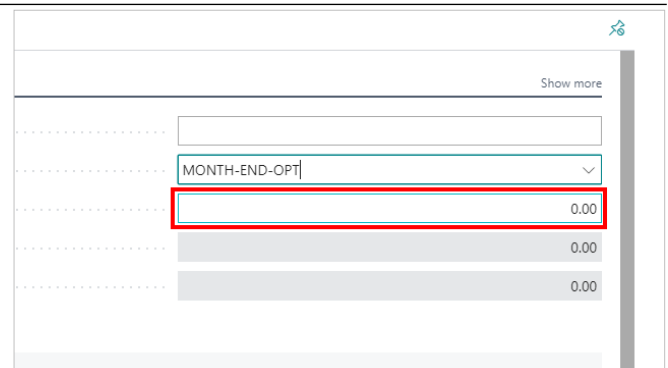


CODE	DESCRIPTION
DAY-WEEK-PEND	Daily Rental - PER. En
MONTH-END	Monthly Rental for E
MONTH-END PROR...	Monthly Rental for P
MONTH-END-OPT	Monthly Rental for C
MONTH-...	Select record "MONTH-END-OPT" rental for C
MONTH-PEND	Monthly Rental - Per

Click on the field **Deposit Amount**

Should a deposit be required from the Customer, enter the amount in the Deposit Amount field.

Once the Rental Lines fields are completed the Contract Total and Outstanding Amount fields will automatically be populated.

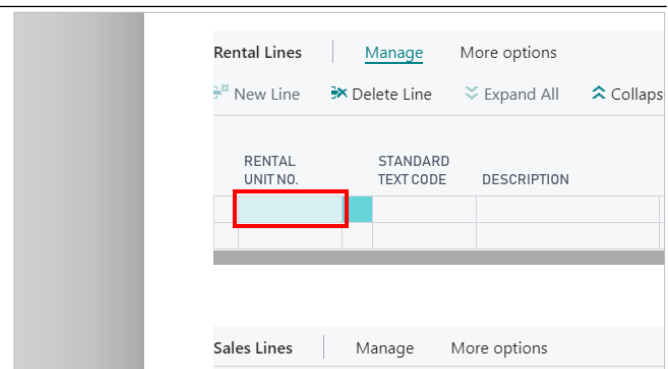


CODE	DESCRIPTION
MONTH-END-OPT	0.00
	0.00
	0.00

3.4.6.2. Entering a Rental Unit Group on the Rental Lines

In this example, the Rental Lines command bar has been pinned to show the sub menu options automatically.

Click on the cell **Rental Unit No.**



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines | Manage | More options
New Line | Delete Line | Expand All | Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00001**

Select the Rental Unit group that contains the Rental Unit you wish to rent out.

NO. RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailers	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00000	Select record "RU00001" Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

To review the rental group availability, complete the following steps.

CRITICAL:
The user must move off the Rental Unit No. field prior to reviewing the Group Availability Matrix.

Should this step be missed, this could lead to the contract not being able to be closed as Rental Amount Lines will be created on the group line and these cannot be deleted or invoiced.

The only way to address this item is to delete the group and linked child lines and re-enter them, which would have to be done prior an invoice is posted. Once an invoice is posted, then although the child lines are fully invoiced and the units have been returned, the contract will not close.

If the units have been shipped, however not invoiced, then the Function, Undo Shipment must be ran on each child unit line. Then the Rental Unit Group line must be deleted, which will delete the child unit lines. After that the group must be re-entered and the units shipped, prior to invoicing.



Click on the navigation menu item popup **Manage**

Quote NO.
Posting Date 4/9/2018
Order Date 4/9/2018
Document Date 4/9/2018

Rental Lines | **Manage** | More options
New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTER CODE
RU00001		Buckeye Ditcher Group	MO

Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the help document -Processing Rentals Overview - Group Availability Matrix Overview.

Order Date 4/9/2018
Document Date 4/9/2018

Rental Lines | **Group Avail Matrix** | More options
New Line Delete Line

View the Group Availability Matrix page

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the back button

Dynamics 365 Business Central Rental Contract - RC00008 > Group Availability Matrix

Group Availability Matrix

Search Process Rental Open in Excel

Options

Start Date 4/9/2018
Show Negative Only

Click on the cell **Rental Terms Code**

The Rental Term Code field will automatically populated from the Rental Unit Group card as the field, Use Rental Unit Terms, has been checked on Rental Management Setup,

For this example, the Rental Term setup on the Rental Unit Group selected is not an optimized monthly term. Therefore, look-up and select the applicable optimized rental term.

Manage | More options
Delete Line Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Manage

UNIT OF

ODT Rentals Online Help

Click on the link in cell **Rental Terms Code**

[Manage](#)
[More options](#)

[Delete Line](#)
[Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
⋮	Buckeye Ditcher Group	MONTH-P	0	

Look up value

Click on **Code = MONTH-END-OPT**, **Description = Monthly Rental for Optimized End Billing**


STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
	Buckeye Ditcher Group	MONTH-PI	0		
		CODE			DESCRIPTION
		MONTH-END			Monthly Rental for E
		MONTH-END PROR...			Monthly Rental for P
		MONTH-END-OPT			Monthly Rental for C
		MONTH-END-OPT			Monthly Rental for C
		MONTH-PEND			Monthly Rental - Pe
		MONTH-PEND-EARLY			Monthly Rental - Ear
		+ New			

The setup of rental prices on the rental unit group are for daily, weekly, and monthly optimized rentals. Each of these rental terms have the other terms setup in the Rental Terms Code Alt1 and Rental Terms Code Alt2 fields.

These terms default to the Rental Terms Code Alt1 and Rental Terms Code Alt2 Rental Line fields when the main Rental Terms Code field is populated.


Click on the cell **Rental Quantity**

More options

 Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	-END-OPT	0		DAY-END-OPT

Enter the text **2**.

More options					
 Group Avail Matrix					
DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	
Buckeye Ditcher Group	MONTH-END...	2		DAY-END-OPT	



ODT Rentals Online Help

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-END...	2		DAY-END-OPT	WEEK-END-O...	4/9/2018

Click on **Code = EAST, Name = East Warehouse**

Select the location from which the rental will occur.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-END...	2		DAY-END-OPT	WEEK-END-O...	4/9/2018

CODE

EAST

NAME

East Warehouse

RENTAL

Select record "EAST"

Inventory Items Re

WEST

West Warehouse

Click on the cell **Rental Return Date**

For this example, the Rental Return Date will need to be changed to be a total of 1 month and 9 days after the Rental Start Date.

RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
DAY-END-OPT	WEEK-END-O...	4/9/2018	5/8/2018	500.00	25.00

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
DAY-END-OPT	WEEK-END-O...	4/9/2018	5/8/2018	500.00	25.00



Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
WEEK-END-O...	4/9/2018	5/8/2018	500.00	25.00	150.00

May 2018

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Today Done

TAX GROUP CODE	LINE AMOUNT EXCL. TAX	QUANT SHIP
*	0.00	0

Click on the cell **Rental Unit Price**

The Rental Unit Price, defaulted from the Rental Price cards setup on the Rental Unit group.

The Alt1 Rental Unit Price and Alt2 Rental Unit Price fields are automatically populated as the Rental Terms Code Alt1 and Rental Terms Code Alt2 are populated on the Rental Line.

The prices in each of these fields can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
WEEK-END-O...	4/9/2018	5/17/2018	500.00	25.00	150.00

LINE AMOUNT

As a group has been entered on the rental line, then the additional child rental lines will automatically be created based on the Rental Quantity entered.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

Rental Lines [Manage](#) More options

New Line Delete Line Expand All Collapse

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
	:	Buckeye Ditcher Group
		Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines [Manage](#) More options

New Line Delete Line Expand All Collapse

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
	...	Buckeye Ditcher Group
	Look up value	Buckeye Ditcher Group

Sales Lines [Manage](#) More options

Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group which is to be rented.

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.** **lookup button**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group which is to be rented.

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings.

3.4.6.3. Reviewing the Rental Amount Lines

Review the Rental Amount Lines for each of the child Rental Lines and verify the expected rental billings, including the Starting Date-Time, Ending Date-Time, amount fields and the Billing Dates.



Select one of the child Rental Lines.

Click on the navigation menu item **More options**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) **More options**

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-END

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) **Line** Functions Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-END

Click on the navigation menu item **Rental Amount Lines**

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) [Line](#) Functions Less

Rental Amount Lines [Rental Ledger Entries](#) [Ren](#)

View the rental amount line records that will be billed for the se

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **5/17/2018**

The Billing Date provides users with the earliest date the unit can be invoiced on.

LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVO NO.
500.00	510.00	SUPPLIES	5/17/2018	<input type="checkbox"/>	
150.00	153.00	SUPPLIES	5/17/2018	<input type="checkbox"/>	
25.00	25.50	SUPPLIES	5/17/2018	<input type="checkbox"/>	
25.00	25.50	SUPPLIES	5/17/2018	<input type="checkbox"/>	
			5/17/2018		
<div>Close</div>					
Outstanding Amount					

For this example there are 4 rental amount lines generated by the pricing calculation.

- One record for the full month rental, at the monthly rental price.

- One record for a week rental, at the weekly rental price.

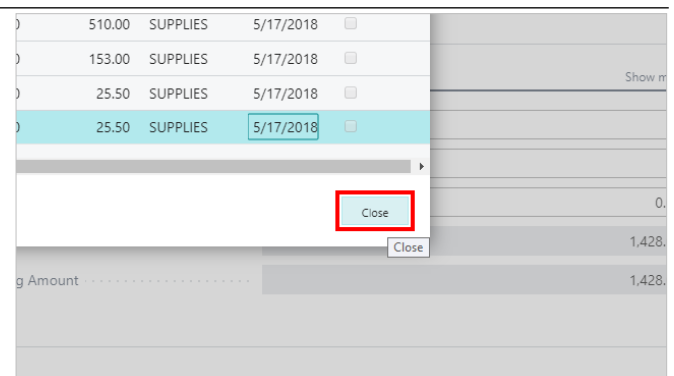
- Two records for the 2 days, at the daily rental price.

With optimization, the price on the terms used can impact the results of the pricing calculation and subsequent Rental Amount Lines created.

For example, if the daily rate times 7 total was less than the weekly rate.
Then instead of only 4 rental amount lines, there would have been 10 records.
One for the monthly rental for a full period and 9 records at the daily rate.

As the terms used have an Invoicing Type of End, the Billing Date is set to the Return Date as entered on the Rental Line.

Click on the button **Close**

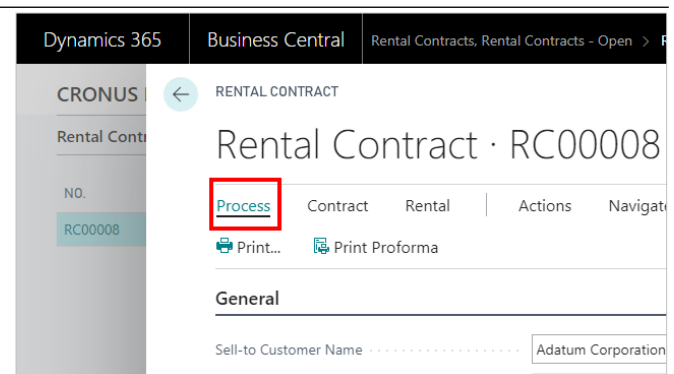


510.00	SUPPLIES	5/17/2018	<input type="checkbox"/>
153.00	SUPPLIES	5/17/2018	<input type="checkbox"/>
25.50	SUPPLIES	5/17/2018	<input type="checkbox"/>
25.50	SUPPLIES	5/17/2018	<input type="checkbox"/>

3.4.6.4. Printing the Rental Contract

The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open > R

CRONUS RENTAL CONTRACT

Rental Contract · RC00008

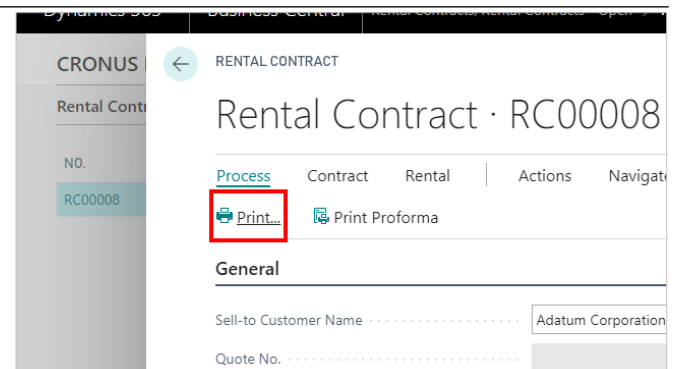
Process Contract Rental Actions Navigat

Print... Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Print...**



Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open > R

CRONUS RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigat

Print... Print Proforma

General

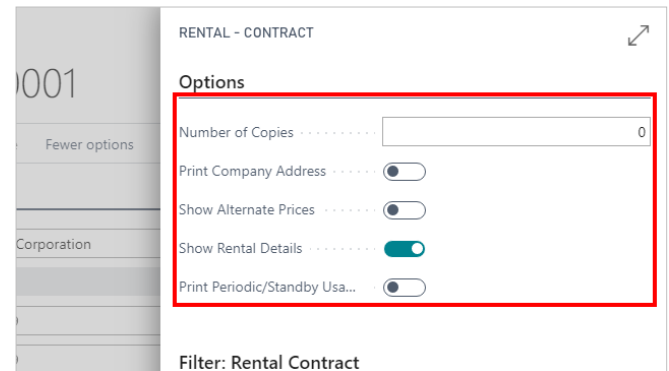
Sell-to Customer Name Adatum Corporation

Quote No.

Options tab

For information on the printing request page, Option tab fields, point to the field name.

For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

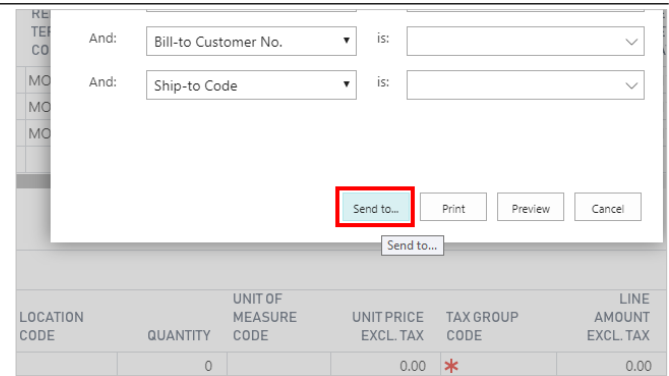


Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print.

Click on the button **Send to...**

In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.

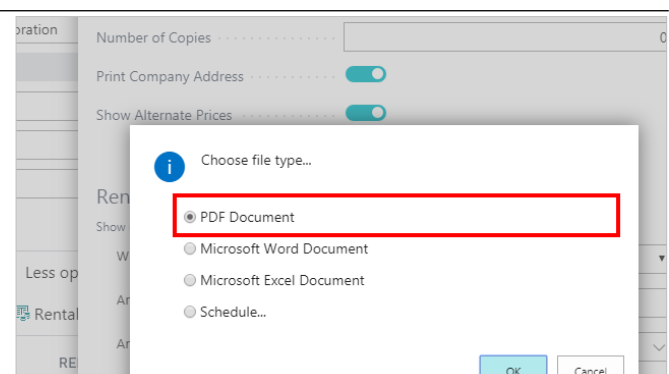
Then select the OK button.



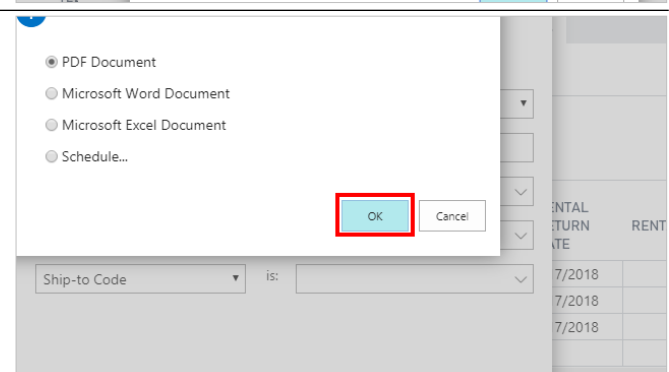
When PDF document is selected and OK is clicked on, then the file for the pdf document will show at the bottom left on the window.

Click on the file to open the pdf file. On the open file save the contract to the location where the document is to be saved to or print the file, if applicable.

Click on the item **PDF Document**



Click on the button **OK**



3.4.6.5.

Shipping the Rental Units

Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by



selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

A listing of all rental units entered, however, not shipped is provided.

NOTE: Sales lines, pending shipments are not included in the listing.

NOTE:

Should some of the rental units entered have different Rental Start Dates, then clear the Qty. to Rent on the lines that will be shipped on a later date than is in the Posting Date field on the General tab of the contract.

Otherwise all rental lines will be shipped as of the date in the Posting Date field.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the shipment is occurring on.

The screenshot shows a 'Proforma' form with a table of rental lines. The first line has a 'Posting Date' of '4/9/2018', which is highlighted with a red box. A tooltip below the date says 'Type the date in the format MM/dd/yyyy'. The table has columns for 'Qty.', 'Rental Start Date', 'Posting Date', and 'Outstanding Balance'.

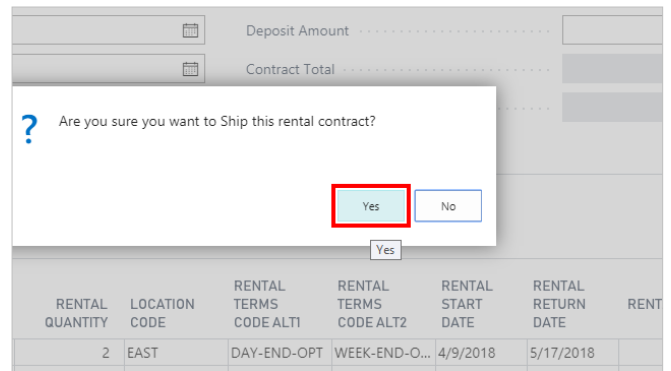
Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract' form for contract 'RC00008'. The 'Rental' tab is highlighted with a red box. The form has tabs for 'Process', 'Contract', 'Rental', 'Actions', and 'Navigate'. Below the tabs are buttons for 'Print...' and 'Print Proforma'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

Click on the navigation menu item **Ship Rentals**

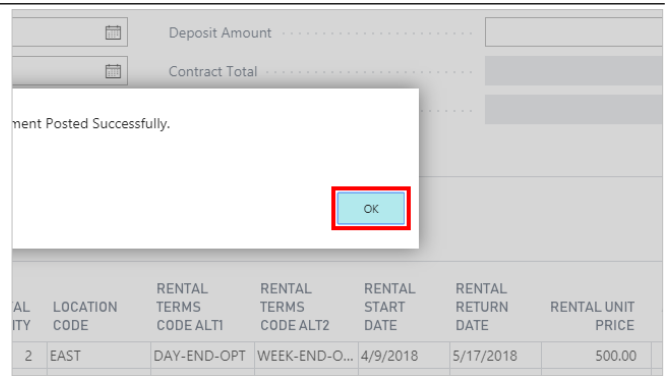
The screenshot shows the 'Rental Contract' form for contract 'RC00008'. The 'Ship Rentals' button is highlighted with a red box. The form has tabs for 'Process', 'Contract', 'Rental', 'Actions', and 'Navigate'. Below the tabs are buttons for 'Ship Rentals', 'Return Rentals', 'Invoice', and 'Inv'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.

Click on the button **Yes**



RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST	DAY-END-OPT	WEEK-END-O...	4/9/2018	5/17/2018	

Click on the button **OK**



AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST	DAY-END-OPT	WEEK-END-O...	4/9/2018	5/17/2018	500.00

Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

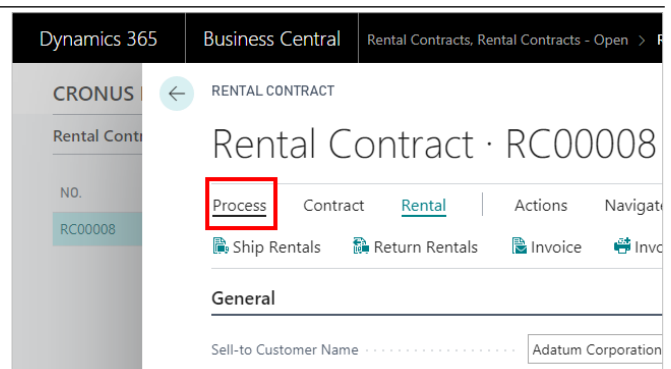
3.4.6.6. Printing or Previewing the Proforma Invoice

The Proforma Invoice is a pre-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

NOTE:

The Proforma will only print the details for those rental units which have been shipped.

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open > F

CRONUS ← RENTAL CONTRACT

Rental Contract · RC00008

NO. RC00008

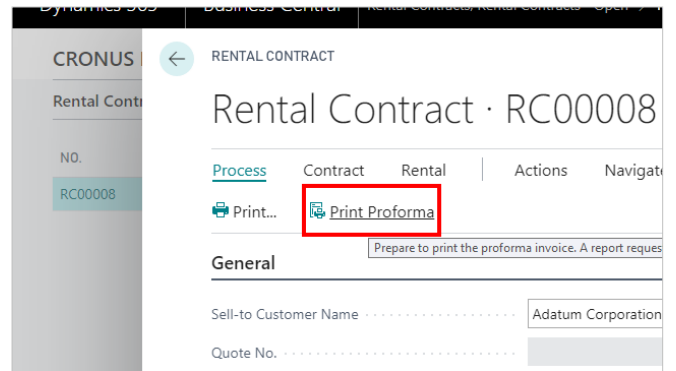
Process Contract Rental Actions Navigat

Ship Rentals Return Rentals Invoice Invc

General

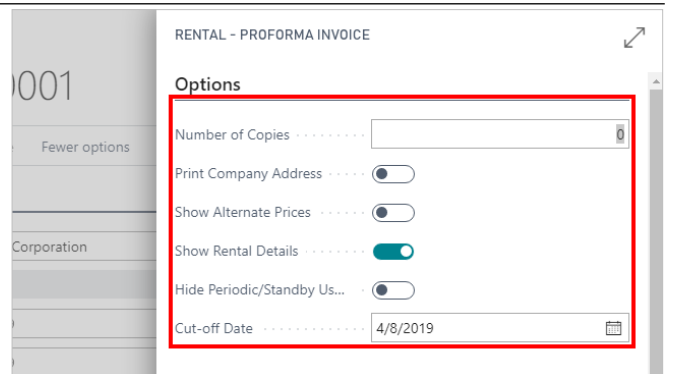
Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Print Proforma**



The screenshot shows the 'RENTAL CONTRACT' screen for contract RC000008. The 'Process' tab is active, and the 'Print Proforma' button is highlighted with a red box. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.

Option tab fields when printing the Proforma Invoice

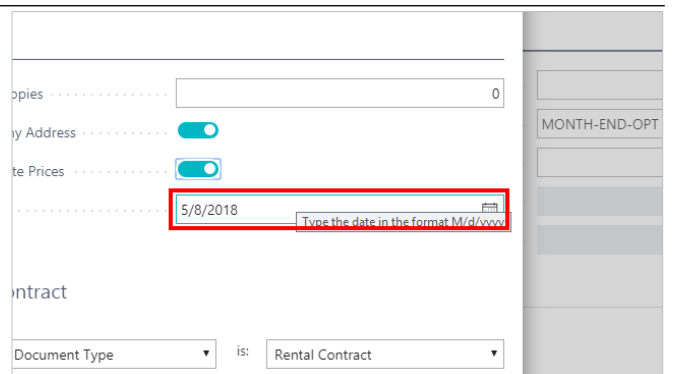


The screenshot shows the 'RENTAL - PROFORMA INVOICE' screen with the 'Options' tab selected. The 'Options' section is highlighted with a red box, showing fields for 'Number of Copies' (0), 'Print Company Address' (toggle on), 'Show Alternate Prices' (toggle on), 'Show Rental Details' (toggle on), 'Hide Periodic/Standby Us...' (toggle on), and 'Cut-off Date' (4/8/2019).

For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

Click on the field **Cut-off Date**



The screenshot shows the 'Cut-off Date' field highlighted with a red box. The field contains the date '5/8/2018' and a tooltip that says 'Type the date in the format M/d/yyyy'. The 'Document Type' is set to 'Rental Contract'.

The users' Work Date in My Settings, automatically defaults to the Cut-off Date field until the first time the Print Proforma is ran.

Then the date that was entered in this field the last time the Print Proforma was ran, is saved in the page and must be updated when subsequently running the Print Proforma.

This can be overridden to specify what Cut-off Date the Proforma Invoice should print the billing up to.

When on Rental Management Setup, the field, Default Blank Return Date is set to No, then the Cut-off Date

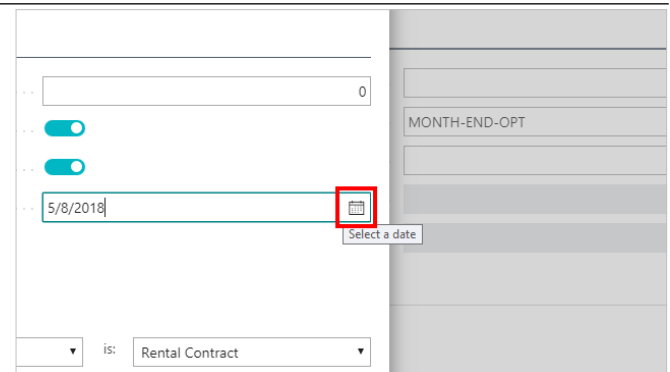
ODT Rentals Online Help

entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

When the Rental Management Setup field, Default Blank Return Date is set to Yes, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Line(s) which have been invoiced and are marked as Billed. The Proforma prints based only on full rental periods.

Should a date be entered that is earlier than the Billing Date on the Rental Amount line, then a message "Nothing to Invoice" will be displayed.

Click on the link

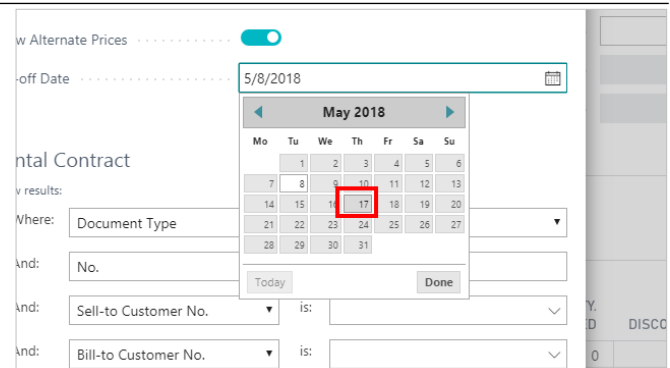


The screenshot shows a form with a 'Cut-off Date' field containing '5/8/2018'. A red box highlights the calendar icon to the right of the date field. Below the icon is a small text label 'Select a date'.

Click on a date in the calendar
Select the date up to, for which the Proforma is to print what the billing will be at that date.

NOTE:

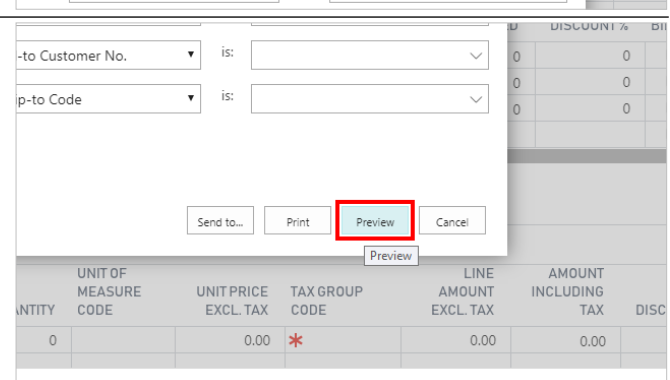
The Billing Date in the Rental Amount lines provides the earliest date at which the invoicing can occur.



The screenshot shows a calendar for May 2018. The date '17' is selected and highlighted with a red box. The calendar is part of a larger form with various fields and buttons.

Click on the button **Preview**

The Proforma Invoice can be sent to PDF, Printed or Previewed.



The screenshot shows the 'Preview' button highlighted with a red box. Below the button is a table with columns: UNIT OF MEASURE CODE, UNIT PRICE EXCL. TAX, TAX GROUP CODE, LINE AMOUNT EXCL. TAX, AMOUNT INCLUDING TAX, and DISC. The table contains one row with values: 0, 0.00, *, 0.00, 0.00, and DISC.

Below is an example of the Proforma Invoice for this contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Proforma Invoice			
		Page: 1			
		Rental Contract Number:	RC00008		
		Rental Proforma Date:	5/17/2018		
Sell	Ship				
To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772	To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772	P.O. Number Customer ID SalesPerson	10000 Peter Saddow		
		Ship Via Terms			
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002	Buckeye Ditcher	BD-002	1		700.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Rental	May 09, 2018 to May 15, 2018		1 @ 150.00/Week = 150.00		
Rental	May 16, 2018 to May 17, 2018		2 @ 25.00/Day = 50.00		
Rates: Month \$500.00|Day \$25.00|Week \$150.00					
RU00003	Buckeye Ditcher	BD-003	1		700.00
Rental	Apr 09, 2018 to May 08, 2018		1 @ 500.00/Month = 500.00		
Rental	May 09, 2018 to May 15, 2018		1 @ 150.00/Week = 150.00		
Rental	May 16, 2018 to May 17, 2018		2 @ 25.00/Day = 50.00		
Rates: Month \$500.00|Day \$25.00|Week \$150.00					
Amount Subject to Sales Tax				1,400.00	
Amount Exempt from Sales Tax				0.00	
				Subtotal:	1,400.00
				Total Sales Tax	28.00
				Total:	1,428.00

3.4.6.7. Invoicing the Rental Contract

In this example, the Rental Term has an Invoicing Type of End.

When using a Rental Term with the Invoicing Type of

End, the invoicing and the return of the rental units can be done either separately or at the same time.

If doing the processes separately, they can be done by invoicing the contract, then returns or returns, then invoicing the contract.

In this example, the invoicing is being done and then the return of the units.

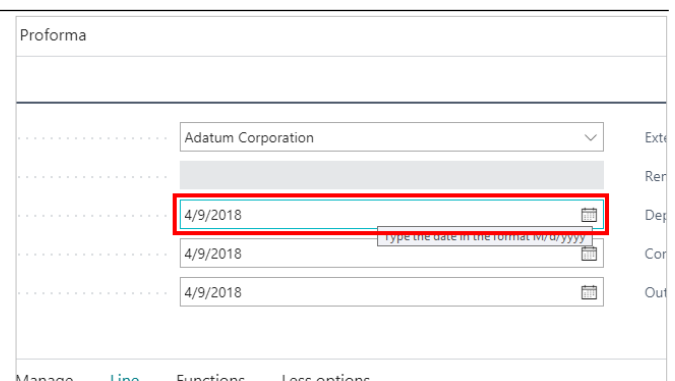
For this Rental Contract the units are being returned on time, which means on the same date in the Rental Return Date in the Rental Lines, and the Posting Date will be the same as the Billing Date the Rental Amount Lines.

Therefore, the Posting Date must be changed to before posting the invoice using the following steps.

Click on the field **Posting Date**

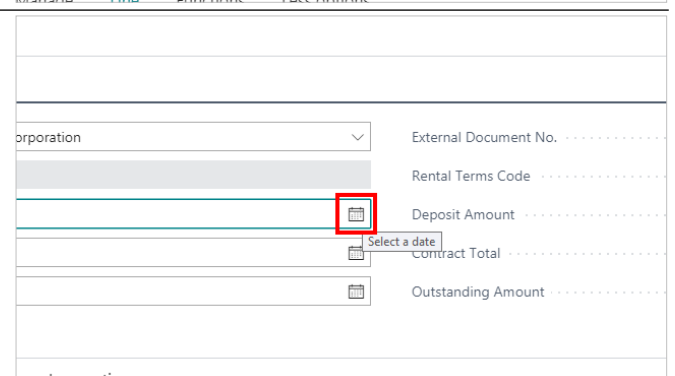
The Posting Date must be equal to or later than the Billing Date that is in the Rental Amount Lines for the unit(s).

Should a date be entered in the Posting Date field that is earlier than the Billing Date, then a message "Nothing to Invoice" will occur.



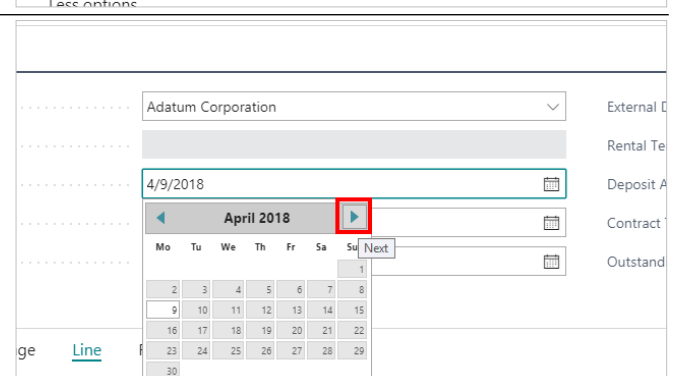
The screenshot shows the 'Proforma' form. The 'Posting Date' field is highlighted with a red box and contains the date '4/9/2018'. A tooltip message 'Type the date in the format m/d/yyyy' is visible next to the field. Other fields like 'Adatum Corporation' and '4/9/2018' are also visible.

Click on the link



The screenshot shows the form with the 'Select a date' link highlighted by a red box. The link is located next to the 'Posting Date' field. Other fields like 'External Document No.', 'Rental Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount' are visible.

Click on the link **Next**



The screenshot shows the form with the 'Next' button highlighted by a red box. The button is located at the bottom right of the form. The 'Posting Date' field still shows '4/9/2018'. A calendar widget is visible below the date field, showing the month of April 2018.



ODT Rentals Online Help

Click on a date in the calendar

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

When using Invoice and Print, the system will used the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract.
These options include Number of Copies, Print Company Address and Show Rental Details.

Click on the button **Yes**



Click on the button **OK**

The screenshot shows a software interface with a dialog box in the center. The dialog box contains the text "ce Posted Successfully." and an "OK" button. The "OK" button is highlighted with a red rectangle. In the background, there is a table with columns: "NTAL PRICE", "QTY. TO RENT", "QTY. ON RENT", "QTY. TO RETURN", "QTY. RETURNED", "LINE DISCOUNT%", and "RE... DAY BIL...". The first row of the table has values: "50.00", "0", "0", "0", "0", "0", and a checked checkbox.

To review the Posted Rental Invoice, select the Posted Invoices on either the Rental or the Navigate command bar option.
A listing of posted invoices for the contract will be displayed.

The Posted Invoice can as well be printed from the invoice list or card.

3.4.6.8. Returning the Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.

A listing of all rental units on rent is provided.

In this example, the returns are being returned on the same date as the Rental Return Date on the lines.

When the following steps are completed the Rental Contract will close as the contract have been fully invoiced, and will be available in the Completed Rental Contracts.

Fully invoiced means that both of the Rental Amount Line records have the Billed field checked. The Billed field is checked by the system when the rental period is invoiced.

Please see Reviewing Rentals, Completed and Posted Rental Documents in the ODT Rentals Online Help site, for information on Completed Rental Contracts.

Click on the field **Posting Date**

Verify the Posting Date is set to the date the rental units are being returned.

The screenshot shows a software interface with a table. The table has columns: "Return Rentals", "Invoice", "Invoice and Print", "Posted Deliveries", and "Post". The table has three rows with dates: "5/17/2018", "4/9/2018", and "5/17/2018". The date "5/17/2018" is highlighted with a red rectangle. Above the table, there is a dropdown menu with "Adatum Corporation" selected. Below the table, there is a text input field with the placeholder "Type the date in the format MM/DD/YYYY".

In this example all rental units are being returned on the same date.

The Qty. To Return must be completed for each rental unit being returned.

Rental Unit group lines do not require this field to be populated.



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Click on the cell **Qty. to Return**

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
150.00	0	0	0	0	0	
150.00	0	1	0	0	0	
150.00	0	1	0	0	0	

Enter the text 1.

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
150.00	0	0	0	0	0	
150.00	0	1		0	0	
150.00	0	1	0	0	0	

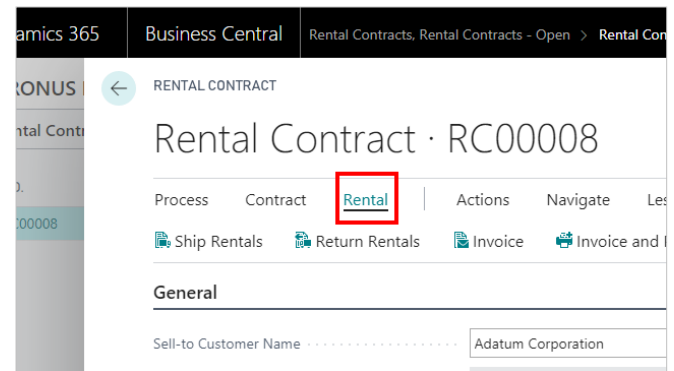
Click on the cell **Qty. to Return**

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
150.00	0	0	0	0	0	
150.00	0	1	1	0	0	
150.00	0	1	0	0	0	
UNIT OF			LINE		AMOUNT	

Enter the text 1.

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
150.00	0	0	0	0	0	
150.00	0	1	1	0	0	
150.00	0	1		0	0	
UNIT OF			LINE		AMOUNT	

Click on the navigation menu item popup **Rental**



Business Central

Rental Contracts, Rental Contracts - Open > Rental Contract

RENTAL CONTRACT

Rental Contract · RC00008

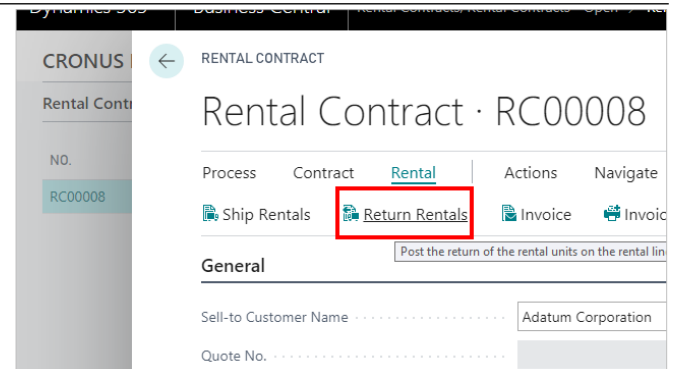
Process Contract **Rental** Actions Navigate

Ship Rentals Return Rentals Invoice Invoice and

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Return Rentals**



Business Central

Rental Contracts, Rental Contracts - Open > Rental Contract

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigate

Ship Rentals **Return Rentals** Invoice Invoice and

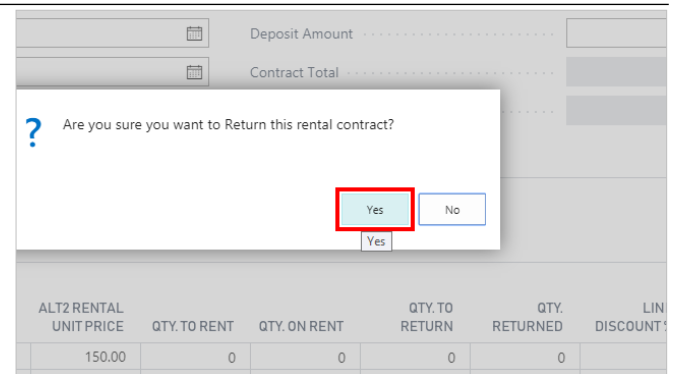
General

Post the return of the rental units on the rental line

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**



Deposit Amount Contract Total

Are you sure you want to Return this rental contract?

Yes No

Yes

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	DISCOUNT	LINE
150.00	0	0	0	0		

The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.7. How to Process Contracts with Prorated Rental Pricing

Profile - Sales Order Processor

Rental Contracts can as well be created from the Business Manager Profile using the steps provided here.

3.4.7.1. Creating a new Rental Contract for Prorated End Billing

In the example provided here, the rental term used is a monthly rental term, however, the rental duration is greater than a single month but less than 2 months.



The rental is for one month and seven days.

The customer will be billed at the end of the contract,
consisting of one month at the full rental price plus
7/31 times the rental price for the 7 days.

Click on the navigation menu item **Rental Contract**

Return Orders Customers Sales Journals Transfer Orders Rental Con
s Item Journals Cash Receipt Journals Rental Quotes Rental Peri

ACTIONS

+ Sales Quote	+ Sales Credit Memo	+ Rental Units >
+ Sales Invoice	+ Rental Quote	> Tasks >
+ Sales Order	+ Rental Contract	> Sales >

Create a new rental contract for rental p

Click on the field **Sell-to Customer Name**

itals Rentals Print Posted Invoices Page

Rental

ct

[Redacted field]

[Alt+Up]

Click on the lookup button **Sell-to Customer Name**

Page

[Redacted field]

External Document No.

Look up value Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Select the Customer that the Rental Contract is for.

Contract

er Name

NO.	NAME	CITY
10000	Adatum Corporation	Atlanta
{ Select record "10000" } Search		
30000	School of Fine Art	Miami
40000	Alpine Ski House	Atlanta
50000	Relecloud	Atlanta

+ New

DESCRIPTION



ODT Rentals Online Help

Click on the field **External Document No.**

If the customer has provided an external document number, then enter it here.

External Document No. field with a dropdown menu. The dropdown menu is open, showing 'MONTH-PEND' as the selected option. Other options include 'DAY-WEEK-PEND', 'MONTH-END', 'MONTH-END PRORATE', 'MONTH-END OPT-TIME', and 'MONTH-PEND'. The 'MONTH-PEND' option is highlighted with a red box.

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

Rental Terms Code field with a dropdown menu. The dropdown menu is open, showing 'MONTH-PEND' as the selected option. Other options include 'DAY-WEEK-PEND', 'MONTH-END', 'MONTH-END PRORATE', 'MONTH-END OPT-TIME', and 'MONTH-PEND'. The 'MONTH-PEND' option is highlighted with a red box.

Click on the lookup button **Rental Terms Code**

Rental Terms Code lookup window. The window shows a list of options with 'MONTH-PEND' selected. Other options include 'DAY-WEEK-PEND', 'MONTH-END', 'MONTH-END PRORATE', 'MONTH-END OPT-TIME', and 'MONTH-PEND'. The 'MONTH-PEND' option is highlighted with a red box.

Click on **Code = MONTH-END PRORATE, Description = Monthly Rental for Prorated End Billing**

Rental Terms Code lookup window. The window shows a list of options with 'MONTH-END PRORATE' selected. Other options include 'DAY-WEEK-PEND', 'MONTH-END', 'MONTH-END PRORATE', 'MONTH-END OPT-TIME', and 'MONTH-PEND'. The 'MONTH-END PRORATE' option is highlighted with a red box.



Click on the field **Deposit Amount**

Should a deposit be required from the Customer, enter the amount in the Deposit Amount field.

Once the Rental Lines fields are completed the Contract Total and Outstanding Amount fields will automatically be populated.

MONTH-END PRORATE

0.00 (Alt+Up) Show tooltip

0.00

0.00

0.00

TI RENTAL	RENTAL UNIT	QTY. TO	QTY. ON	QTY. TO	QTY.	DISCO...	LINE	RET...

3.4.7.2. Entering a Rental Unit Group on the Rental Lines

Click on the cell **Rental Unit No.**

Rental Lines | Manage | More options

New Line | Delete Line | Expand All | Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines | Manage | More options

New Line | Delete Line | Expand All | Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Look up value

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00001**

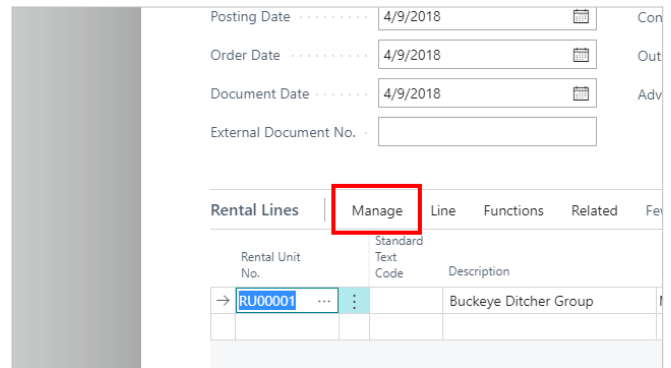
NO. RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Select record "RU00001"

To review the rental group availability, complete the following steps.

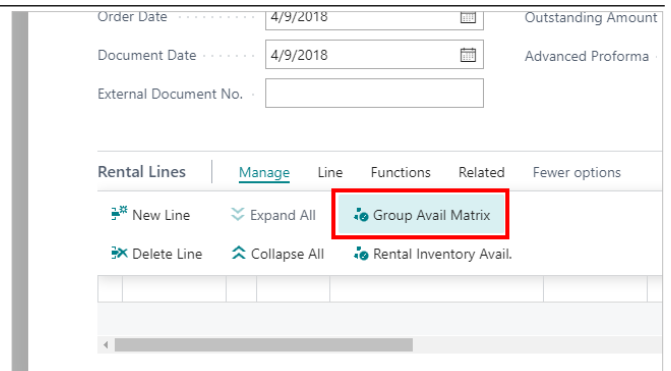
Click on the navigation menu item popup **Manage**



The screenshot shows a form with fields for Posting Date, Order Date, Document Date, and External Document No., all set to 4/9/2018. Below these fields is a table with columns: Rental Unit No., Standard Text Code, Description, and Functions. The first row shows 'BU00001' in the Rental Unit No. column and 'Buckeye Ditcher Group' in the Description column. The 'Manage' button is highlighted in a red box.

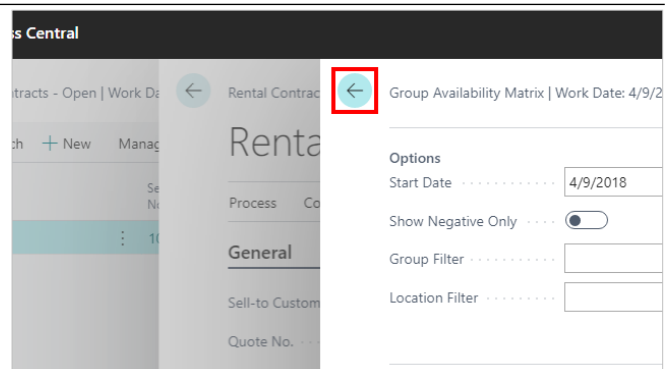
Click on the navigation menu item **Group Avail Matrix**

For information on the Group Availability Matrix, please see the help document -Processing Rentals Overview - Group Availability Matrix Overview.



The screenshot shows a form with fields for Order Date, Document Date, and External Document No., all set to 4/9/2018. Below these fields is a table with columns: Rental Unit No., Standard Text Code, Description, Functions, Related, and Fewer options. The first row shows 'BU00001' in the Rental Unit No. column and 'Buckeye Ditcher Group' in the Description column. The 'Group Avail Matrix' button is highlighted in a red box.

Click on the back button

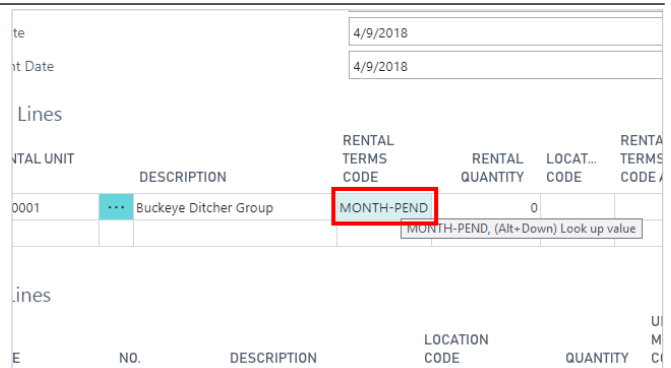


The screenshot shows a mobile interface with a 'Back' button highlighted in a red box. The interface includes a 'Rental Contract' section with a 'Process' button and a 'General' section with a 'Quote No.' field. The 'Back' button is located at the top left of the screen.

Click on the cell **Rental Terms Code**

The Rental Term Code field will automatically populated from the Rental Unit Group card as the field, Use Rental Unit Terms, has been checked on Rental Management Setup,

As the Rental Term setup on the Rental Unit Group is not a prorated term, the Rental Term must be changed to a Prorated term.



The screenshot shows a table with columns: RENTAL UNIT, DESCRIPTION, RENTAL TERMS CODE, RENTAL QUANTITY, LOCAT... CODE, and RENTAL TERMS CODE. The first row shows '0001' in the RENTAL UNIT column, 'Buckeye Ditcher Group' in the DESCRIPTION column, and 'MONTH-PEND' in the RENTAL TERMS CODE column. The 'MONTH-PEND' cell is highlighted in a red box.



Click on the lookup button in the cell **Rental Terms Code**

		4/9/2018			
		4/9/2018			
	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI
...	Buckeye Ditcher Group	MONTH-...	0		
			Look up value		
NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	

Click on **Code = MONTH-END PRORATE**,
Description = Monthly Rental for Prorated End Billing

NIT	DESCRIPTION	TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	TERMS CODE ALTI
...	Buckeye Ditcher Group	MONTH-P...	0		
		CODE DESCRIPTION			
		DAY-WEEK-PEND Daily Rental - Per. End Bill			
		MONTH-END Monthly Rental for Billing			
		MONTH-END PRORATE Monthly Rental for Prorat			
		MONTH-... Select record "MONTH-END PRORATE" Optim			
		MONTH-END-OPT-TIME Monthly Rental for Optim			
		MONTH-PEND Monthly Rental - Per. Billi			
+ New					
NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	

Click on the cell **Rental Quantity**

		4/9/2018			
		4/9/2018			
	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI
...	Buckeye Ditcher Group	PRORATE	0		
NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	

Enter the text **2**.

		4/9/2018			
		4/9/2018			
	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI
...	Buckeye Ditcher Group	MONTH-EN...	2		
NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	



Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

4/9/2018		...			
4/9/2018		...			
RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-EN...	2	...			4/9/2018
(Alt+Down) Look up value					
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	

Click on the lookup button in the cell **Location Code**

4/9/2018		...			
4/9/2018		...			
RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-EN...	2	...			4/9/2018
Look up value					
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX CODE

Click on **Code = EAST, Name = East Warehouse**

Select the location from which the rental will occur.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-EN...	2	...			4/9/2018
CODE NAME					
EAST East Warehouse					
West Warehouse					
+ New					
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX CODE

Click on the cell **Rental Return Date**

For this example, the Rental Return Date will need to be changed to be 7 days after the defaulted Rental Return Date.

Contract Total		Outstanding Amount			
RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	RENTAL UNIT PRICE
		4/9/2018	5/8/2018	5,000.00	0.00
5/8/2018, Type the date in the format M/d/yyyy					
UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	



Click on the lookup button in the cell **Rental Return Date**

Contract Total					
Outstanding Amount					
RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	5,000.00	0.00	0.00
Select a date					
UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %

Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	5,000.00	0.00	0.00
May 2018					
Mo Tu We Th Fr Sa Su					
1 2 3 4 5 6					
7 8 9 10 11 12 13					
14 15 16 17 18 19 20					
21 22 23 24 25 26 27					
28 29 30 31					
Today Done					
UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %

Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

Contract Total					
Outstanding Amount					
RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/15/2018	5,000.00	0.00	0.00
5,000.00					
UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %

As a group has been entered on the rental line, then the additional child rental lines will automatically be created based on the Rental Quantity entered.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.

Click on the cell **Rental Unit No.**

Rental Lines	Manage	More options
New Line	Delete Line	Expand All
Collapse		
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group
Sales Lines		
Manage	More options	



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Manage

More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00002**

Select the Rental Unit in the group that is to be rented.

Rental C

NO.

RC0000

Edit

View

RENTAL UNIT LIST + New

NO.		DESCRIPTION	GROUP
BD-006	:	Buckeye Ditcher	<input type="checkbox"/>
RU00002	:	Buckeye Ditcher	<input type="checkbox"/>
RU00003	:	Buckeye Ditcher	<input type="checkbox"/>
RU00004	:	Buckeye Ditcher	<input type="checkbox"/>
RU00005	:	Buckeye Ditcher	<input type="checkbox"/>
RU00006	:	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	:	Sub Buckeye Ditcher	<input type="checkbox"/>

Select record "RU00002"

Click on the cell **Rental Unit No.**

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002 ...	:	Buckeye Ditcher
	:	Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group
Look up value		

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00003**

Select the Rental Unit in the group that is to be rented.

RENTAL UNIT LIST + New		
NO.		GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

If any fields on the Rental Unit group record are modified, the child rental lines will be updated to the same settings.

3.4.7.3. Reviewing the Rental Amount Lines

Review the Rental Amount Lines for the child Rental Line and the rental line for the Rental Unit not linked to a group to verify the expected rental billing, including the amounts and the Billing Date.

Select one of the child Rental Lines.

Click on the navigation menu item popup **Line**

Posting Date	4/9/2018	Contract Total
Order Date	4/9/2018	Outstanding Am
Document Date	4/9/2018	Advanced Profo
External Document No.		
<div> Rental Lines Manage Line Functions Related Fewer options </div>		
Rental Unit No.	Standard Text Code	Rental Terms Code
RU00001	Buckeye Ditcher Group	MONTH-PEN
→ RU00002	Buckeye Ditcher	MONTH-PEN
RU00003	Buckeye Ditcher	MONTH-PEN

Click on the navigation menu item **Rental Amount Lines**

Order Date	4/9/2018
Document Date	4/9/2018
External Document No.	
<div> Rental Lines Manage Line Function </div>	
Rental Amount Lines	View Rental Calen
Rental Ledger Entries	Metered Usage E
Rental Value Entries	Periodic Usage En

Click on the cell **Extended Quantity**

When prorating for partial rental periods the Extended Quantity field calculates based on the number of days rental in the period when the number of days is less than a full rental period divided by the number of days in a full rental period.

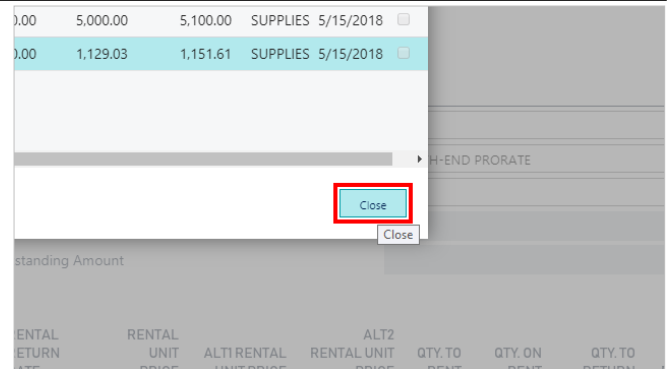
In this example, the rental contains only 7 days in the following rental period, which occurs in a month that has 31 days.

Thus the Extended Quantity is calculated as 7 divided

NTAL LINE RENTAL AMOUNTS						
	STARTING DATE-TIME	ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	AM INCL
...	4/9/2018 12:00 AM	5/8/2018 11:59 PM	1	5,000.00	5,000.00	5
...	5/9/2018 12:00 AM	5/15/2018 11:59 PM	0.22581	5,000.00	1,129.03	1

by 31 = .22581.
The Extended Quantity field is rounded to 5
characters.

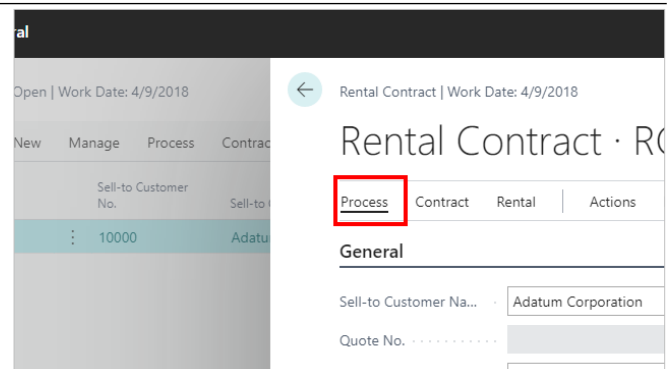
Click on the button **Close**



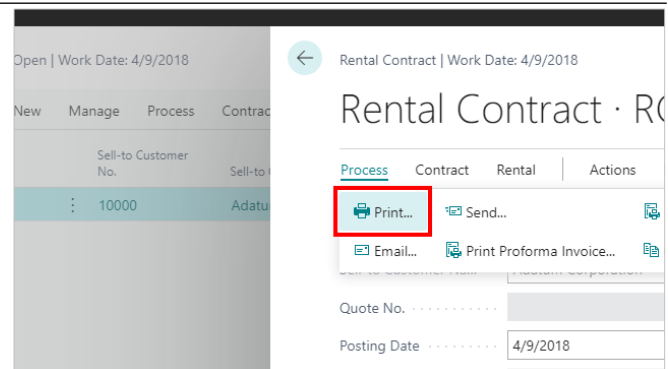
3.4.7.4. Printing the Rental Contract

The Rental Contract can be reviewed and printed to
send to the customer.

Click on the navigation menu item popup **Process**



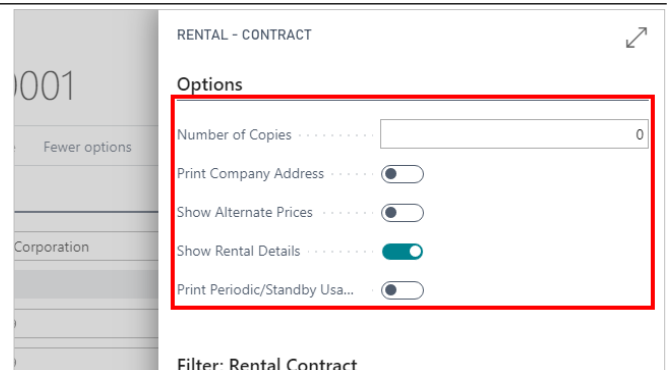
Click on the navigation menu item **Print...**



Options tab

For information on the printing request page, Option
tab fields, point to the field name.

For additional information on the fields, go to ODT
Rentals Online Help, Processing Rentals, Rental
Contracts, Rental Contract Overview.

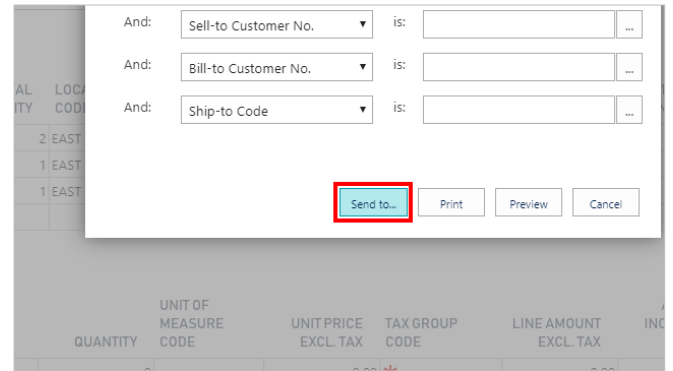


ODT Rentals Online Help

Should your organization require the contract to be printed instead of saved as a PDF document, then Instead of selecting the Send to option, select Print.

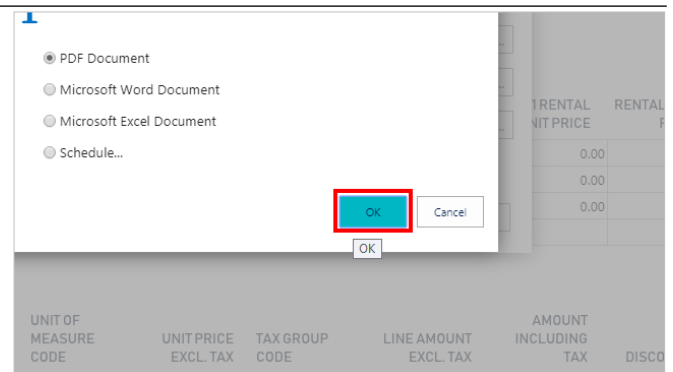
Click on the button **Send to...**

In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.



When PDF document is selected and OK is clicked on a window will open.
Browse to the location where the document is to be saved to.

Click on the button **OK**



3.4.7.5. Shipping the Rental Units

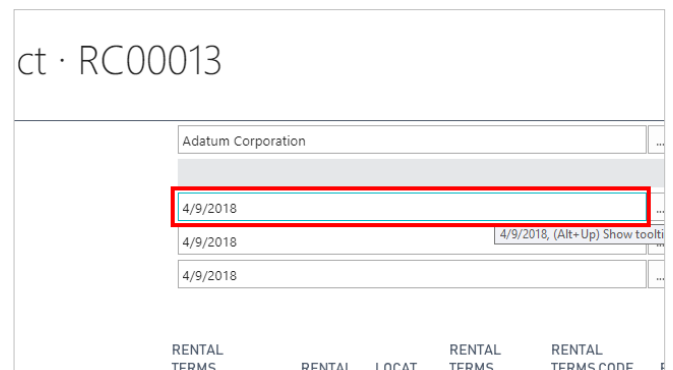
Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions ribbon tab.

A listing of all rental units entered, however, not shipped is provided.

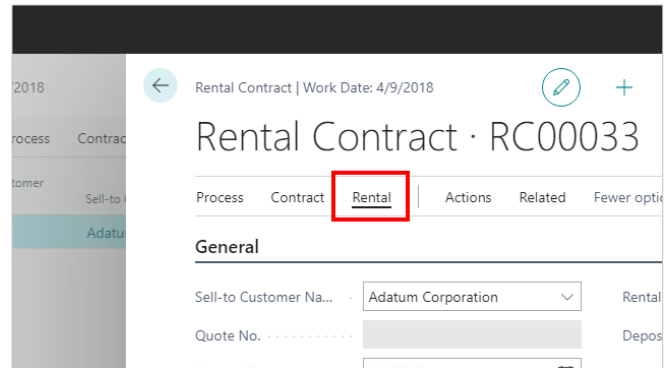
NOTE: Sales lines, pending shipments are not included in the listing.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the shipment is occurring on.



Click on the navigation menu item popup **Rental**



Rental Contract | Work Date: 4/9/2018

Rental Contract · RC00033

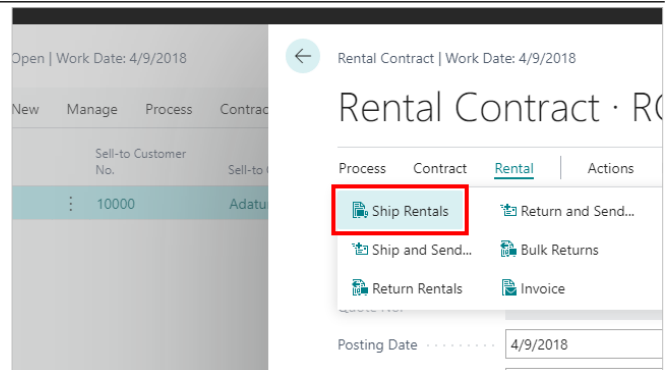
Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Ship Rentals**



Open | Work Date: 4/9/2018

New Manage Process Contract

Sell-to Customer No. Sell-to

10000 Adatu

Rental Contract · RC

Process Contract **Rental** Actions

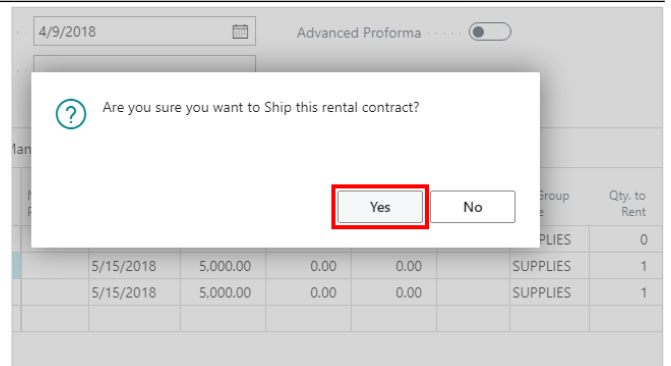
Ship Rentals Return and Send...

Ship and Send... Bulk Returns

Return Rentals Invoice

Posting Date 4/9/2018

Click on the button **Yes**



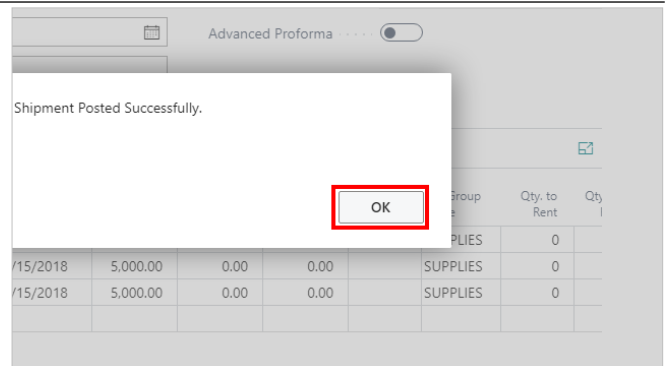
4/9/2018 Advanced Proforma

Are you sure you want to Ship this rental contract?

Yes No

Group	Qty. to Rent
SUPPLIES	0
SUPPLIES	1
SUPPLIES	1

Click on the button **OK**



Shipment Posted Successfully.

OK

Group	Qty. to Rent	Qty. I
SUPPLIES	0	
SUPPLIES	0	
SUPPLIES	0	

Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries on the Home ribbon in the Rental section.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed using the



Print option on the ribbon of the Posted Deliveries list or the card.

3.4.7.6. Invoicing the Rental Contract

Prior to invoicing the contract, the Proforma Invoice can be printed or previewed by going to the menu option Process, then Print Proforma.

The Proforma Invoice is a pre-invoice, which provides the ability to review what will be billed to the Customer based on a specified Cut-Off Date.

NOTE:

The Proforma Invoice will only include the unit which have been shipped and are slated to be billed based on the Cut-Off Date. The Proforma will capture only those Rental Amount Lines with a Billing Date equal to or earlier than the Cut-Off Date specified and have not been invoiced.

In this example, the Rental Term has an Invoicing Type of End.

When using a Rental Term with the Invoicing Type of End, the invoicing and the return of the rental units can be done either separately or at the same time.

If doing the processes separately, they can be done by invoicing the contract, then returns or returns, then invoicing the contract.

In this example, the invoicing is being done and then the return of the units.

For this Rental Contract the units are being returned on time, which means on the same date in the Rental Return Date in the Rental Lines, and the Posting Date will be the same as the Billing Date the Rental Amount Lines.

Therefore, the Posting Date must be changed to before posting the invoice using the following steps.

Click on the field **Posting Date**

The Posting Date must be equal to or later than the Billing Date that is in the Rental Amount Lines for the unit(s). Therefore the Posting date must be changed to July 7.

Adatum Corporation					
4/9/2018					
4/9/2018					
4/9/2018					

RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-EN...	2	EAST			4/9/2018
MONTH-EN...	1	EAST			4/9/2018
MONTH-EN...	1	EAST			4/9/2018



ODT Rentals Online Help

Click on the field **Posting Date**

Select the look-up button in the Posting Date field.

	...	External Document No.
		Rental Terms Code
		Deposit Amount
	Select a date	Contract Total
	...	Outstanding Amount

NTAL	LOCAT...	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
		TERMS	TERMS CODE	RENTAL	RETURN	UNIT	AL

Click on the link **Next**

RC00013

Adatum Corporation

4/9/2018

April 2018

Mo Tu We Th Fr Sa Su

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30

RENTAL TERMS CODE ALT1

RENTAL TERMS CODE ALT2

RENTA START

Click on a date in the calendar

Name

Adatum Corporation

4/9/2018

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Today Done

DESCRIPTION

Buckeye Ditcher Group

Buckeye Ditcher

MONTH-EN...

1 EAST

RENTAL TERMS CODE ALT1

RENTAL TERMS CODE ALT2

RENTA START

Click on the navigation menu item popup **Rental**

Rental Contract · RC00033

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental Terms Co

Quote No. Deposit Amoun

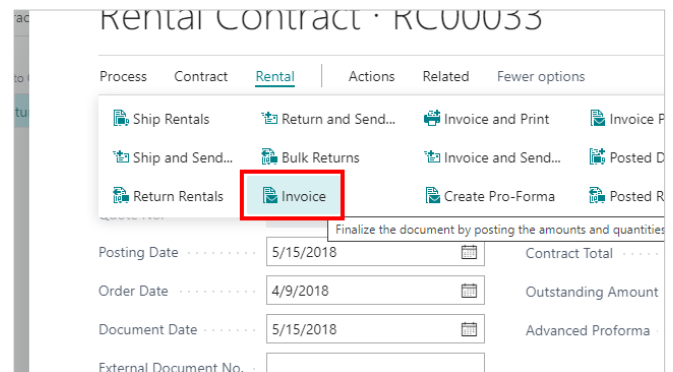
Posting Date 5/15/2018 Contract Total

Order Date 4/9/2018 Outstanding An

Document Date 5/15/2018 Advanced Profo

External Document No.

Click on the navigation menu item **Invoice**

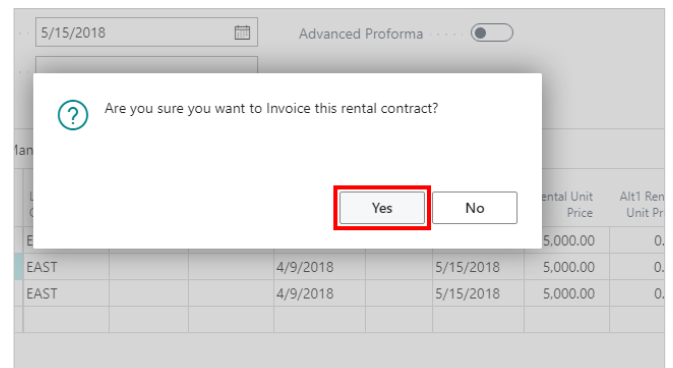


Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the ribbon. When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

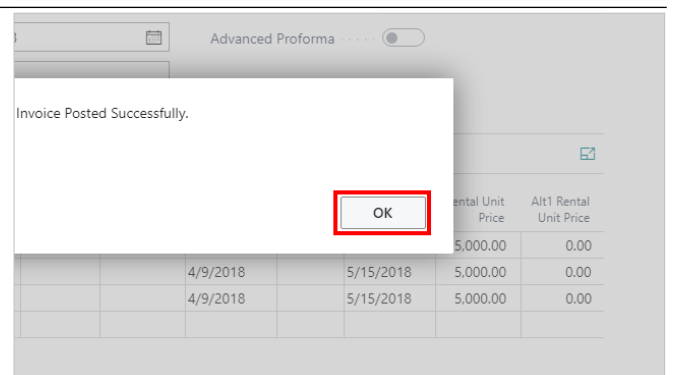
Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract. These options include Number of Copies, Print Company Address and Show Rental Details.

Alternatively you can select Invoice and Send, if the Document Sending Profile on the Customer card is set to an Email profile and the email address is specified.

Click on the button **Yes**



Click on the button **OK**



To review the Posted Rental Invoice, select the Posted Invoices option on the Home ribbon tab. A listing of all posted invoices will be displayed and the invoice can be reviewed and printed.

The Posted Invoice can as well be printed from the invoice card.

3.4.7.7. Returning Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions ribbon tab.



ODT Rentals Online Help

A listing of all rental units on rent is provided.

In this example, the returns are being returned after the invoicing of the contract.

When the following steps are completed the Rental Contract will close and will be available in the Completed Rental Contracts.

Please see Reviewing Rentals - Completed and Posted Rental Documents in the ODT Rentals Online Help site for information on Completed Rental Contracts.

Click on the field **Posting Date**

Verify the Posting Date is set to the date the rental units are being returned.

00015

Adatum Corporation	...	Extern
		Renta
5/15/2018	5/15/2018 (Alt Up) Click to help. Type the date in the format MM/DD/YYYY	Depo
4/9/2018	...	Contr
5/15/2018	...	Outst

RENTAL TERMS CODE	RENTAL QUANTITY	LOCAT... CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RE DA
MONTH-EN...		2 EAST			4/9/2018	5/1

Click on the cell **Qty. to Return**

12.503.22							
RENTAL IT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURN...	LINE DISCO... %	RET... DAY BIL...
0.00	0.00	0	0	0	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1	0	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1	0	0	0	<input checked="" type="checkbox"/>
							<input type="checkbox"/>
MOUNT LUDING							
LINE		QUANTITY		QTY. TO		QUANTITY	

The Qty. To Return is to be completed for each rental unit being returned.

Rental Unit group lines do not require this field to be populated.

Enter the text 1.

								12,503.22
RENTAL IT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURN...	LINE DISCO... %	RET... DAY BIL...	
0.00	0.00	0	0	0	0	0	<input checked="" type="checkbox"/>	
0.00	0.00	0	1	1	0	0	<input checked="" type="checkbox"/>	
0.00	0.00	0	1	0	0	0	<input checked="" type="checkbox"/>	
							<input type="checkbox"/>	
MOUNT LUDING								
LINE		QUANTITY		QTY. TO		QUANTITY		



Click on the cell **Qty. to Return**

RENTAL IT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURN...	LINE DISCO... %	RET... DAY BIL...
0.00	0.00	0	0	0	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1	1	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1	0	0	0	<input checked="" type="checkbox"/>
				0			<input type="checkbox"/>
AMOUNT LUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED	QTY. TO INVOICE	QUANTITY INVOICED		

Enter the text **1**.

RENTAL IT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURN...	LINE DISCO... %	RET... DAY BIL...
0.00	0.00	0	0	0	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1	1	0	0	<input checked="" type="checkbox"/>
0.00	0.00	0	1		0	0	<input checked="" type="checkbox"/>
							<input type="checkbox"/>
AMOUNT LUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED	QTY. TO INVOICE	QUANTITY INVOICED		

Click on the navigation menu item popup **Rental**

Contract

Sell-to
Adatu

Rental Contract · RC00033

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental Terms Co

Quote No. Deposit Amount

Posting Date 5/15/2018 Contract Total

Order Date 4/9/2018 Outstanding Am

Document Date 5/15/2018 Advanced Profo

External Document No.

Click on the navigation menu item **Return Rentals**

New Manage Process Contract

Sell-to Customer
No. Sell-to

10000 Adatu

Rental Contract · RC

Process Contract **Rental** Actions

Ship Rentals Return and Send...

Ship and Send... Bulk Returns

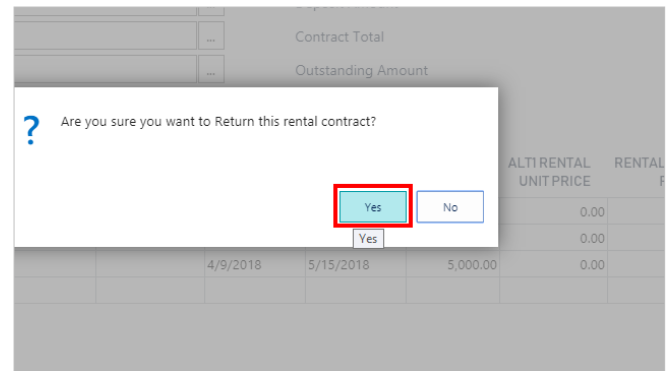
Return Rentals Invoice

Posting Date 5/15/2018

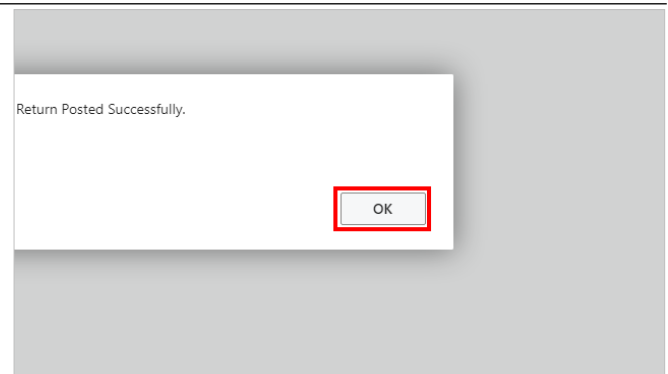
Order Date 4/9/2018

Document Date 5/15/2018

Click on the button **Yes**



Click on the button **OK**



The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.8. How to Process Contracts with a Summarized Day Rental Term

3.4.8.1. Overview

When organizations are renting product and billing using a daily rate on a contract which has a longer duration, the use of a daily rental term with the field, Summarize Rental Lines, activated will summarize the Rental Amount Lines into a single line for ease of review.

The Rental Amount Line, Starting Date-Time and Ending Date-Time, will in essence be based on the Rental Start Date and Rental Return Date.

The Rental Start Date and Rental Return Date automatically populate the Rental Billing Start Date-Time and Rental Ending Date-Time, which in turn, will automatically populate the Rental Amount Line, Starting Date-Time and Ending Date-Time on the summarized line.

When the day term is Periodic End or Periodic Start and multiple invoice invoices will be processed for only a portion of the contract at a time, the Rental Amount Line will be split each time an invoice is posted.

For example, when the first invoice is posted for a portion of the contract, the Rental Amount Lines will split and the first line will display the invoiced dates, and the next line will contain the remaining days not invoiced. If another invoice is posted for another set of dates, the second line will split into 2 lines, with one line for the days invoiced, and the next line will contain the date range for the days not invoiced.

3.4.8.2. How to Process Contracts with a Summarized Day Rental

ODT Rentals Online Help

Term

The following example demonstrates the processing of a contract with a daily rental term that has the Summarize Rental Lines field activated.

The rental includes a group with a rental quantity of 1, and a single unit linked to an item with a rental quantity of 3 and the rental will be for 25 days.

In order to demonstrate the summarization on the Rental Amount lines, an invoice will be posted after 2 weeks, and a second invoice will be posted at the end of the contract.

The additional field, Billing Unit Quantity, has been added to the Rental Amount Lines in order to provide an explanation on how the Line Amount Excl. Tax is calculated.

Click on the navigation menu item **Rental Contract**

[Rental Terms](#) [Rental Units](#) [Rental Packages](#)

ACTIONS

- + [Sales Quote](#)
- + [Purchase Order](#)
- + [Rental Unit](#)
- + [Sales Order](#)
- + [Purchase Invoice](#)
- > [New](#)
- + [Sales Invoice](#)
- + [Rental Quote](#)
- > [Payments](#)
- + [Purchase Quote](#)
- + [Rental Contract](#)
- > [Reports](#)

Click on the field **Sell-to Customer Name**

The screenshot shows the SAP Fiori 'Manage Data' app interface. At the top, there is a header bar with the date '11.09.2020' and a user icon. Below the header, there is a navigation bar with the text 'Actions', 'Navigate', and 'Fewer options'. The main area displays a table with several rows. The first row is highlighted. A red rectangular box is drawn around the 'Look up value' button in the first row of the table. The button is labeled 'Look up value' and has a magnifying glass icon next to it.

Click on the link in cell **No.** with the value **10000**

Contract	Rental	Actions	Navigate	Fewer options
al				
Customer Name				
Date				
Date				
nt Date				

RENTAL

10000	Adatum Corporation	31
2001	Select record "10000"	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New



ODT Rentals Online Help

Click on the cell **Rental Unit No.**

The screenshot shows a web application interface with a sidebar on the left containing a back arrow button. The main content area displays a table with the following columns: Rental Unit No., Standard Text Code, Description, and Rental Term Code. The first row of the table has the 'Rental Unit No.' cell highlighted with a red rectangle. Above the table, there are tabs labeled 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. Below the table, there are additional tabs labeled 'Sales Lines', 'Manage', 'Line', and 'Fewer options'.

Click on the lookup button in the cell **Rental Unit No.**

This screenshot is similar to the previous one, but the 'Rental Unit No.' cell in the first row of the table now contains a small blue square with three dots, which is the lookup button. This button is highlighted with a red rectangle.

Click on the link in cell **No.** with the value **RU00001**

The screenshot shows a dropdown menu that appears after clicking the lookup button. The menu lists several rental units with their descriptions and checkboxes. The option 'RU00001 : Buckeye Ditcher Group' is highlighted with a red rectangle. The other options include RP00001 (Mini Excavator with Vibrator Plate), RP00002 (Wacker Skid Steer Package), RU00007 (165 G Brad Nailer), RU00026 (Wacker Hammer Drill Bits 3/16 inch), RU00027 (Air Impact Wrench 1 inch Drive), BD-006 (Buckeye Ditcher), RU00002 (Buckeye Ditcher), RU00003 (Buckeye Ditcher), RU00004 (Buckeye Ditcher), RU00005 (Buckeye Ditcher), and RU00006 (Buckeye Ditcher).

Click on the cell **Rental Terms Code** with the value **MONTH-END**

The screenshot shows the 'Rental Lines' table with the 'Rental Terms Code' cell in the first row highlighted with a red rectangle. The value 'MONTH-END' is visible in this cell. The table also shows the 'Description' as 'Buckeye Ditcher Group' and the 'Rental Quantity' as 0. The sidebar and tabs are consistent with the previous screenshots.



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Terms Code**

Functions Fewer options					
xt	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
	Buckeye Ditcher Group	MONTH-EI	0		
Fewer options					

Click on the link in cell **Code** with the value **DAILY-PEND**

Description		Code	Rental Quantity	Location Code	Code Alt1
	Buckeye Ditcher Group	MONTH-EI	0		
		Code	Description		
		2 HR	2 Hour Rental - End Billing		
		4 HR	4 Hour Rental - End Billing		
		8 HR	8 Hour Rental - End Billing		
Line	Fewer options	DAILY-PEND	Daily Rental - Per. Billing in		
		DAY-END	Select record "DAILY-PEND" for Billing at En		
Description		DAY-END-OPT	Daily Rental for Optimized E		
		+ New			
			0		
Fewer options					

Click on the cell **Rental Quantity** with the value **0**

Functions Fewer options					
	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
	Buckeye Ditcher Group	DAY-PEND	0		
Fewer options					

Enter the text **1**.

Functions Fewer options					
	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
	Buckeye Ditcher Group	DAY-PEND	1		
Fewer options					



Click on the cell **Location Code**

Rental Terms						
Lower options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Group	DAY-PEND					4/6/2020
			Look up value			

Click on the link in cell **Code** with the value **EAST**

Rental Terms						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
up	DAY-PEND	1				4/6/2020
up	DAY-PEND	1				
			Code ↑		Name	
			→ CENTRAL		Central Warehouse	
			EAST		East Warehouse	
			RENTRESERV		Inventory Items Rental Rese	
			SOUTH		South Warehouse	
			TEMP		Temporary Location	
			+ New			

Click on the cell **Rental Return Date** with the value **4/6/2020**

Rental Terms						
	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Line Amount Excl. Tax	Rental Unit Price
			4/6/2020	4/6/2020	0.00	300.00
			4/6/2020	4/6/2020	0.00	300.00

Click on the link in cell **Rental Return Date** with the value **4/6/2020**

Rental Terms						
	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Line Amount Excl. Tax	Rental Unit Price
			4/6/2020	4/6/2020	0.00	300.00
			4/6/2020	4/6/2020	0.00	300.00



ODT Rentals Online Help

Click on a date in the calendar

Select the expected date of return. For this example, April 30 is selected.

Code ALTZ	Date	Return Date	Amount Excl. Tax	Price	Price
	4/6/2020	4/6/2020	0.00	300.00	0.00
	4/6/2020			300.00	0.00

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Go to today Done

tax Group Code	Line Amount Excl. Tax	Including Tax	Line Discount %	Currency Code	Qty. to Ship
K	0.00	0.00	0		0

Click on the cell **Rental Unit No.**

Rental Lines

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→ RU00001		Buckeye Ditcher Group	DAY-PEN
		Buckeye Ditcher Group	DAY-PEN

Sales Lines

Manage	Line	Fewer options
--------	------	---------------

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→ RU00001		Buckeye Ditcher Group	DAY-PEN
		Buckeye Ditcher Group	DAY-PEN

Sales Lines

Manage	Line	Fewer options
--------	------	---------------

Click on the link in cell **No.** with the value **RU00002**

Search Rental Open in Excel Navigate Fewer options

RENTAL UNIT LIST

No. ↑	Description	Group ↑
→ BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

The following demonstrates the summarized Rental Amount Lines when the rental quantity is 1.



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date 4/6/2020

Order Date 4/6/2020

Document Date 4/6/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
RU00001		Buckeye Ditcher Group	DAILY-PE
→ RU00002 ...		Buckeye Ditcher	DAILY-PE

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/6/2020

Document Date 4/6/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Value Entries | Metered Usage Entries

Rental Ledger Entries | View Rental Calendar | Periodic Usage Entries

→ RU00002		Buckeye Ditcher	DAILY-PE
-----------	--	-----------------	----------

Click on the cell **Ending Date-Time** with the value **4/30/2020 11:59 PM**

Note that the Starting Date-Time and Ending Date-Time cover the full length of the contract.

VIEW - RENTAL LINE RENTAL AMOUNTS

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price
Rental	4/6/2020 12:00 AM	4/30/2020 11:59 PM	1	

Click on the cell **Billing Date** with the value **4/30/2020**

The Billing Date is set to the date in the Ending Date-Time field.

Item Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.	Billed
	7,875.00	SUPPLIES	4/30/2020			



ODT Rentals Online Help

Click on the cell **Extended Quantity** with the value **1**

The Extended Quantity displays the quantity from the rental line.

Open in Excel

NE RENTAL AMOUNTS

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Am
4/6/2020 12:00 AM	4/30/2020 11:59 PM	1	300.00	

Click on the cell **Total Days** with the value **25**

The Total Days displays the number of days from the date in the Starting Date-Time field to the date in the Ending Date-Time field.

Group Code	Billing Date ↑	Billed	Invoice No.	Total Days
PPLIES	4/30/2020	<input type="checkbox"/>		25

Click on the cell **Billing Unit Quantity** with the value **25**

The Billing Unit Quantity is a calculated quantity based on Extended Quantity times Total Days and is used in calculation the Line Amount Excl. Tax. For this line, 1 times 25 = 25.

ie	Billing Date ↑	Billed	Invoice No.	Billing Unit Quantity	Total Days
	4/30/2020	<input type="checkbox"/>		25	25

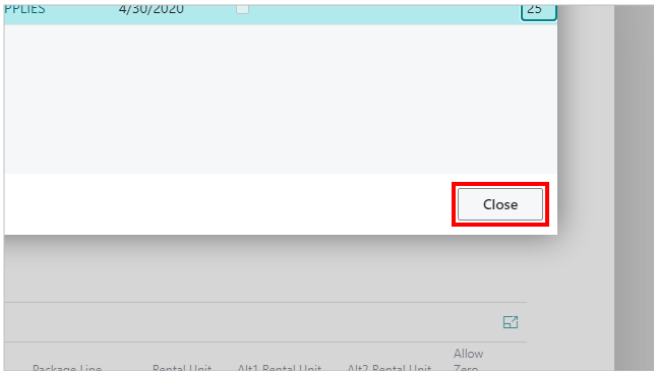
Click on the cell **Line Amount Excl. Tax** with the value **7,500.00**

The Line Amount Excl. Tax calculation is the Unit Price Excl. Tax times the Billing Unit Quantity. For this Rental Amount Line, 300.00 times 25 = 7,500.00.

Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Inc
1:59 PM	1	300.00	7,500.00		7,500.00

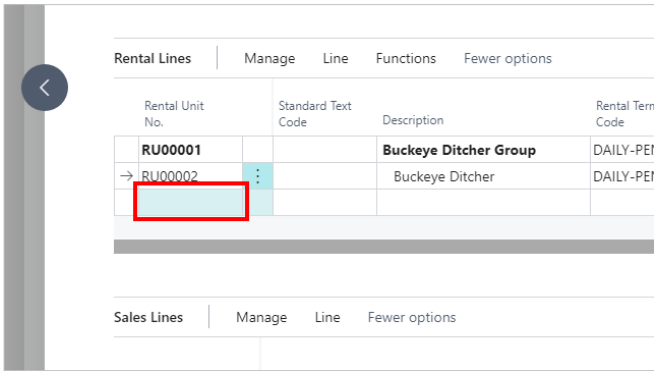


Click on the button **Close**

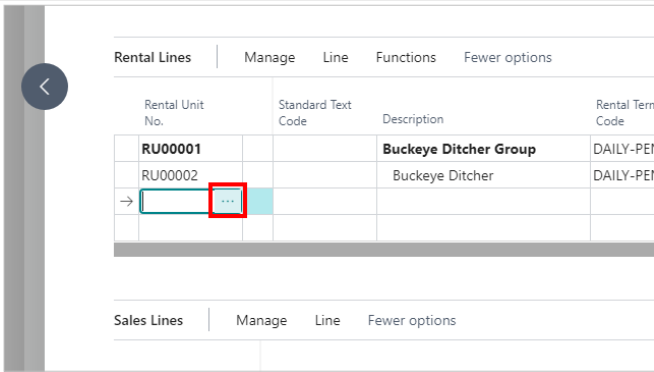


The following demonstrates the summarized Rental Amount Lines when the rental quantity is greater than 1.

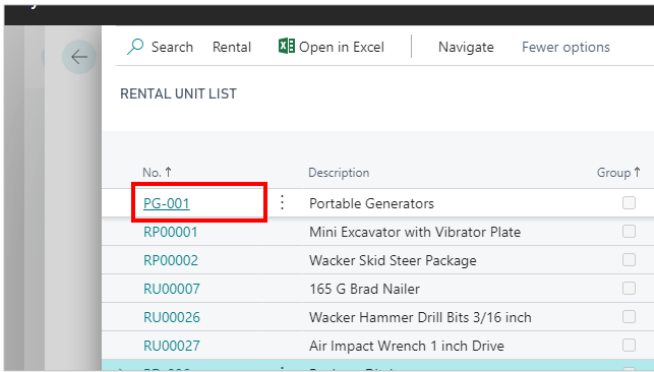
Click on the cell **Rental Unit No.**



Click on the lookup button in the cell **Rental Unit No.**



Click on the link in cell **No.** with the value **PG-001**





Click on the cell **Rental Terms Code** with the value **MONTH-END**

Page					Line	Functions	Fewer options		
Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code					
	Buckeye Ditcher Group	DAILY-PEND	1	EAST					
	Buckeye Ditcher	DAILY-PEND	1	EAST					
	Portable Generators	MONTH-END	0						
Page								Line	Fewer options
									Unit of

Click on the lookup button in the cell **Rental Terms Code**

e Functions Fewer options					
xt	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
	Buckeye Ditcher Group	DAILY-PEND	1	EAST	
	Buckeye Ditcher	DAILY-PEND	1	EAST	
	Portable Generators	MONTH-E	0		
			Look up value		
Fewer options					
			Unit of	Unit Price Excl	

Click on the link in cell **Code** with the value **DAILY-PEND**

	Buckeye Ditcher Group	DAILY-PEND	1	EAST	
	Buckeye Ditcher	DAILY-PEND	1	EAST	
	Portable Generators	MONTH-EI	0		
		Code	Description		
		8 HR	8 Hour Rental - End Billing		
		DAILY-PEND	Daily Rental - Per. Billing in		
		DAY-END	Daily Rental for Billing at En		
		DAY-END-OPT	Daily Rental for Optimized E		
		DAY-END-OPT-TIME	Daily Rental for Optimized E		
		+ New			

Click on the cell **Rental Quantity** with the value **0**

Functions					Fewer options	
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1		
Buckeye Ditcher Group	DAILY-PEND	1	EAST			
Buckeye Ditcher	DAILY-PEND	1	EAST			
Portable Generators	DAILY-PEND	0				



ODT Rentals Online Help

Enter the text **3**.

Functions Fewer options				
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Buckeye Ditcher Group	DAILY-PEND	1	EAST	
Buckeye Ditcher	DAILY-PEND	1	EAST	
Portable Generators	DAILY-PEND	3		
Fewer options				
Unit of Unit Price Excl.				

Click on the cell **Location Code**

Fewer options				
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Buckeye Ditcher Group	DAILY-PEND	1	EAST	
Buckeye Ditcher	DAILY-PEND	1	EAST	
Portable Generators	DAILY-PEND	3		
Fewer options				
Unit of Unit Price Excl.				

Click on the link in cell **Code** with the value **EAST**

Code	Rental Quantity	Location Code	Code Alt1	Code Alt2	Date
DAILY-PEND	1	EAST			4/6/2020
DAILY-PEND	1	EAST			4/6/2020
DAILY-PEND	3				4/6/2020
Code ↑ Name					
→ CENTRAL Central Warehouse					
EAST East Warehouse					
REN Select record "EAST" Inventory Items Rental Rese					
SOUTH South Warehouse					
TEMP Temporary Location					
WEST West Warehouse					
+ New					

Click on the cell **Rental Return Date** with the value **4/6/2020**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Line Amount Excl. Tax	Rental Unit Price
		4/6/2020	4/30/2020	0.00	300.00
		4/6/2020	4/30/2020	0.00	300.00
		4/6/2020	4/6/2020	0.00	25.00
Unit Price Excl. Line Amount Amount					



ODT Rentals Online Help

Click on the link in cell **Rental Return Date** with the value **4/6/2020**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Line Amount Excl. Tax	Rental Unit Price
		4/6/2020	4/30/2020	0.00	300.00
		4/6/2020	4/30/2020	0.00	300.00
		4/6/2020	4/6/2020	0.00	25.00

Click on a date in the calendar

Select the expected date of return. For this example, April 30 is selected.

4/6/2020	4/30/2020	0.00	300.00	0.00
4/6/2020	4/6/2020	0.00	25.00	0.00

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Go to today Done

Click on the navigation menu item popup **Line**

Posting Date	4/6/2020
Order Date	4/6/2020
Document Date	4/6/2020

Rental Lines Manage **Line** Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
RU00001		Buckeye Ditcher Group	DAILY-PE
RU00002		Buckeye Ditcher	DAILY-PE
→ PG-001		Portable Generators	DAILY-PE

Click on the navigation menu item **Rental Amount Lines**

Order Date	4/6/2020
Document Date	4/6/2020

Rental Lines Manage **Line** Functions Fewer options

Rental Amount Lines Rental Value Entries Metered Usage Entries

Rental Ledger Entries View Rental Calendar Periodic Usage Entries

RU00002		Buckeye Ditcher	DAILY-PE
→ PG-001		Portable Generators	DAILY-PE



ODT Rentals Online Help

Click on the cell **Extended Quantity** with the value **3**

The Extended Quantity displays the quantity from the rental line.

Open in Excel

NE RENTAL AMOUNTS

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Am
4/6/2020 12:00 AM	4/30/2020 11:59 PM	3	25.00	

Click on the cell **Total Days** with the value **25**

The Total Days displays the number of days from the date in the Starting Date-Time field to the date in the Ending Date-Time field.

Billing Date ↑	Billed	Invoice No.	Billing Unit Quantity	Total Days
4/30/2020	<input type="checkbox"/>		75	25

Click on the cell **Billing Unit Quantity** with the value **75**

The Billing Unit Quantity is a calculated quantity based on Extended Quantity times Total Days and is used in calculation the Line Amount Excl. Tax. For this line, 3 times 25 = 75.

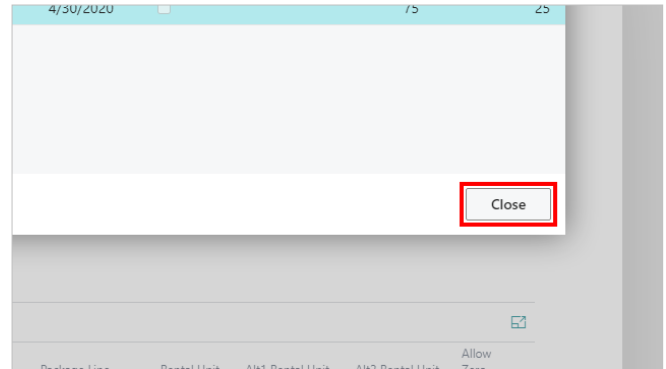
Billing Date ↑	Billed	Invoice No.	Billing Unit Quantity	Total Days
4/30/2020	<input type="checkbox"/>		75	25

Click on the cell **Line Amount Excl. Tax** with the value **1,875.00**

The Line Amount Excl. Tax calculation is the Unit Price Excl. Tax times the Billing Unit Quantity. For this Rental Amount Line, 25.00 times 75 = 1,875.00.

Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount
3	25.00	1,875.00		

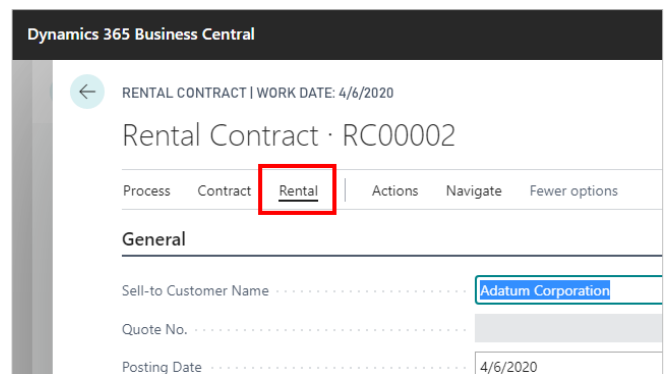
Click on the button **Close**



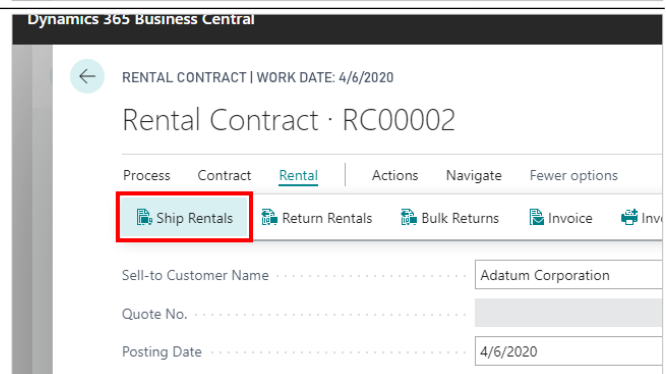
The contract can be previewed, printed or sent to PDF by selecting Process, then Print.

The following demonstrates the shipping and then invoicing of the contract 2 weeks after the Rental Start Date, and the review of the Rental Amount Lines after invoicing.

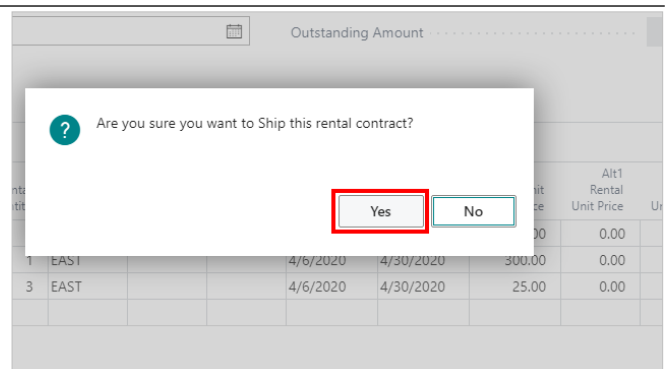
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**





Click on the button **OK**

Outstanding Amount

Shipment Posted Successfully.

OK

					Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre Code
					0.00	0.00	
	4/6/2020	4/30/2020		300.00	0.00	0.00	
	4/6/2020	4/30/2020		25.00	0.00	0.00	

Click on the field **Posting Date**

Adatum Corporation

4/6/2020

4/6/2020

4/6/2020

Click on the link **Open the date picker**

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

The date selected is 2 weeks after the start date, which will invoice the days from the start date up to and including the date selected in the Posting Date field.

4/6/2020

April 2020

19

Rental Unit No.	Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
RU00001	:	Buckeye Ditcher Group	DAILY-PEND	1	EAST
RU00002		Buckeye Ditcher	DAILY-PEND	1	EAST

A Proforma Invoice can be printed, previewed or sent to PDF by selecting Process, then Print Proforma.



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00002

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/19/2020

Click on the navigation menu item **Invoice**

Optionally Invoice and Print can be selected.

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00002

Contract **Rental** Actions Navigate Fewer options

Rentals

Customer Name Adatum Corporation

Posting Date 4/19/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

							Alt1 Rental Unit Price	Alt2 Rental Unit Price	Unit Price
1	EAST	4/6/2020	4/30/2020	300.00	0.00				
3	EAST	4/6/2020	4/30/2020	25.00	0.00				

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

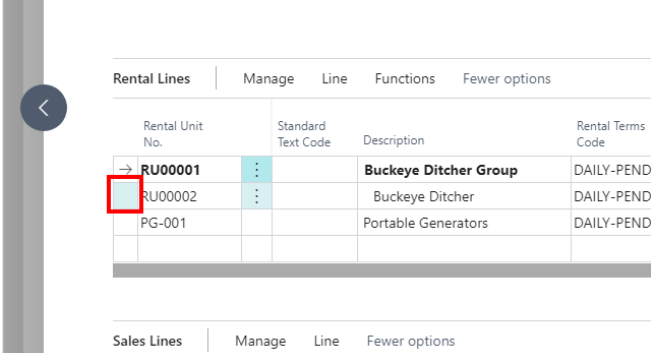
OK

							Alt1 Rental Unit Price	Alt2 Rental Unit Price	Current Code
1	EAST	4/6/2020	4/30/2020	300.00	0.00				
3	EAST	4/6/2020	4/30/2020	25.00	0.00				

The following is a review of the rental amount lines to demonstrate the splitting of the lines when an invoice is posted for a portion of days on the rental contract.

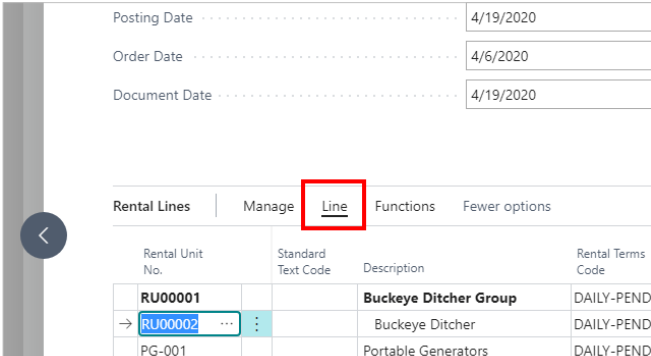


Click on **Rental Unit No. = RU00002, Rental Terms Code = DAILY-PEND, Rental Quantity = 1**



Rental Lines					Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code					
→ RU00001	⋮	Buckeye Ditcher Group	DAILY-PEND					
RU00002	⋮	Buckeye Ditcher	DAILY-PEND					
PG-001		Portable Generators	DAILY-PEND					

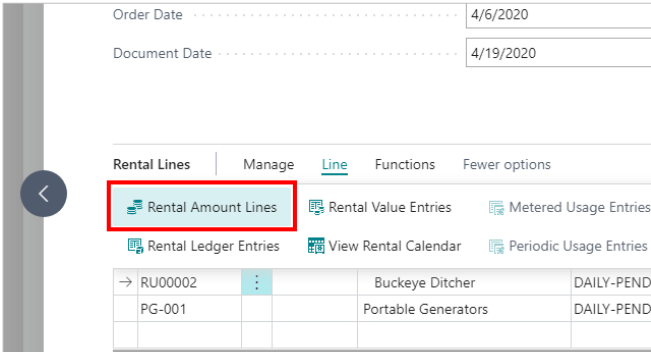
Click on the navigation menu item popup **Line**



Posting Date	4/19/2020
Order Date	4/6/2020
Document Date	4/19/2020

Rental Lines					Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code					
RU00001		Buckeye Ditcher Group	DAILY-PEND					
→ RU00002	⋮	Buckeye Ditcher	DAILY-PEND					
PG-001		Portable Generators	DAILY-PEND					

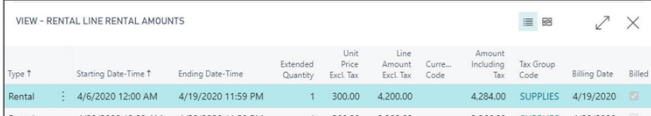
Click on the navigation menu item **Rental Amount Lines**



Order Date	4/6/2020
Document Date	4/19/2020

Rental Lines					Manage	Line	Functions	Fewer options
→ RU00002					⋮			
PG-001								

The following picture displays a portion of the Rental Amount Lines after the invoice was posted, which now has 2 records.



Type	Starting Date-Time	Ending Date-Time	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre. Code	Amount Including Tax	Tax Group Code	Billing Date	Billed
Rental	4/6/2020 12:00 AM	4/19/2020 11:59 PM	1	300.00	4,200.00		4,284.00	SUPPLIES	4/19/2020	☑
Rental	4/20/2020 12:00 AM	4/30/2020 11:59 PM	1	300.00	3,300.00		3,366.00	SUPPLIES	4/30/2020	☐

Note that on the first line the Ending Date-Time and the Billing Date now contain the date the invoice was posted, and that the Billed field is checked.

On the new line the Date-Time fields cover the remaining days yet to be invoiced and the Billing Date contains the same date as the Rental Return Date on the Rental Line.

The following picture contains the other fields on the Rental Amount Lines.



Type	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre. Code	Amount Including Tax	Tax Group Code	Billing Date	Billed	Invoice No.	Billing Unit Quantity	Total Days
Rental	1	300.00	4,200.00		4,284.00	SUPPLIES	4/19/2020	☑	RI00001	14	14
Rental	1	300.00	3,300.00		3,366.00	SUPPLIES	4/30/2020	☐		11	11

Note that on the first line the Invoice No. field is populated with the Posted Invoice No. and that the Billing Unit Quantity and Total Days now display 14, which is the number of days that were invoiced.

The Line Amount Excl. Tax on the first line contains the amount before tax that has been invoiced. This amount is calculated as the Unit Price Excl. Tax of



ODT Rentals Online Help

300.00 times the Billing Unit Quantity of 14, which equals 4200.00.

The second line Billing Unit Quantity and Total Days fields contain the number of days remaining to be invoiced.

The Line Amount Excl. Tax on the second line contains the amount before tax that has yet to be invoiced. This amount is calculated as the Unit Price Excl. Tax of 300.00 times the Billing Unit Quantity of 11, which equals 3300.00.

Click on the button **Close**

A screenshot of a modal window. At the top, there are two rows of data. The first row shows '4/19/2020', 'RU00001', '14', and '14'. The second row shows '4/30/2020', a checkbox, '11', and '11'. The '11' in the second row is highlighted with a blue box. At the bottom right of the modal, there is a 'Close' button highlighted with a red rectangle.

Click on **Rental Unit No. = PG-001, Rental Terms Code = DAILY-PEND, Rental Quantity = 3**

A screenshot of the 'Rental Lines' table. The table has columns: Rental Unit No., Standard Text Code, Description, and Rental Terms Code. The rows are: RU00001 (Buckeye Ditcher Group, DAILY-PEND), RU00002 (Buckeye Ditcher, DAILY-PEND), and PG-001 (Portable Generators, DAILY-PEND). The PG-001 row is highlighted with a red rectangle. Below the table, there are tabs for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. The 'Line' tab is selected.

Click on the navigation menu item popup **Line**

A screenshot of the 'Line' tab in the 'Rental Lines' table. The table has columns: Rental Unit No., Standard Text Code, Description, and Rental Terms Code. The rows are: RU00001 (Buckeye Ditcher Group, DAILY-PEND), RU00002 (Buckeye Ditcher, DAILY-PEND), and PG-001 (Portable Generators, DAILY-PEND). The PG-001 row is highlighted with a blue box. Above the table, there are fields for 'Posting Date' (4/19/2020), 'Order Date' (4/6/2020), and 'Document Date' (4/19/2020). Below the table, there are tabs for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. The 'Line' tab is selected.



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Click on the navigation menu item **Rental Amount Lines**

Order Date 4/6/2020

Document Date 4/19/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Value Entries | Metered Usage Entries

Rental Ledger Entries | View Rental Calendar | Periodic Usage Entries

RJ00002		Buckeye Ditcher	DAILY-PEND
→ PG-001		Portable Generators	DAILY-PEND

The following picture displays a portion of the Rental Amount Lines after the invoice was posted, which now has 2 records.

Note that on the first line the Ending Date-Time and the Billing Date now contain the date the invoice was posted, and that the Billed field is checked.

On the new line the Date-Time fields cover the remaining days yet to be invoiced and the Billing Date contains the same date as the Rental Return Date on the Rental Line.

VIEW - RENTAL LINE RENTAL AMOUNTS

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Cume... Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed
Rental	4/6/2020 12:00 AM	4/19/2020 11:59 PM	3	25.00	1,050.00		1,071.00	SUPPLIES	4/19/2020	<input checked="" type="checkbox"/>
Rental	4/20/2020 12:00 AM	4/30/2020 11:59 PM	3	25.00	825.00		841.50	SUPPLIES	4/30/2020	<input type="checkbox"/>

The following picture contains the other fields on the Rental Amount Lines.

Note that on the first line the Invoice No. field is populated with the Posted Invoice No.

VIEW - RENTAL LINE RENTAL AMOUNTS

Type ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Cume... Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.	Billing Unit Quantity	Total Days
Rental	3	25.00	1,050.00		1,071.00	SUPPLIES	4/19/2020	<input checked="" type="checkbox"/>	RI00001	42	14
Rental	3	25.00	825.00		841.50	SUPPLIES	4/30/2020	<input type="checkbox"/>		33	11

The Total Days field contains the number of days, 14, which were invoiced. The Billing Unit Quantity contains the calculated number of days, Total Days of 14 times the Extended Quantity of 3, which equals 42.

The Line Amount Excl. Tax on the first line contains the amount before tax that has been invoiced. This amount is calculated as the Unit Price Excl. Tax of 25.00 times the Billing Unit Quantity of 42, which equals 1050.00.

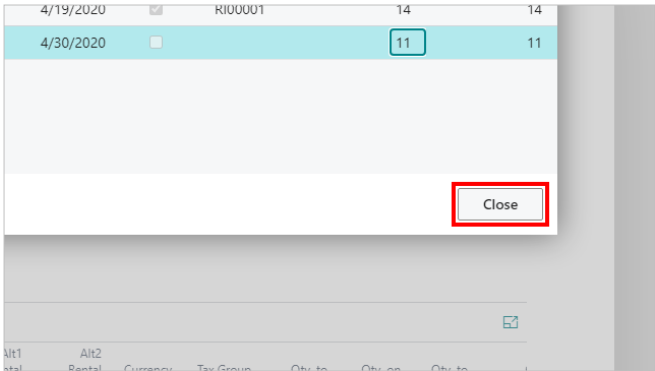
On the second line the Total Days field contain the number of days remaining to be invoiced. The Billing Unit Quantity contains the calculated number of days, Total Days of 11 times the Extended Quantity of 3, which equals 33.

The Line Amount Excl. Tax on the second line contains the amount before tax that has yet to be invoiced. This amount is calculated as the Unit Price Excl. Tax of 25.00 times the Billing Unit Quantity of 33, which equals 825.00.



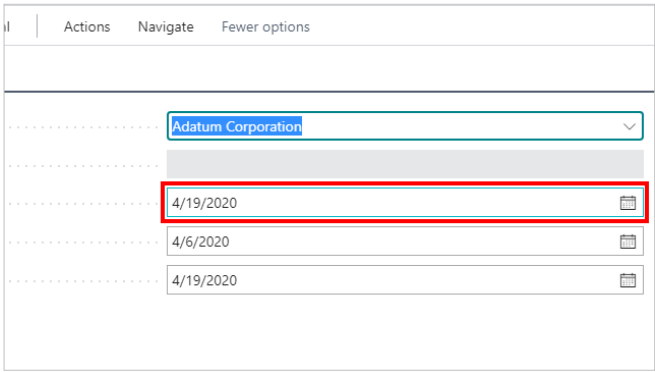
ODT Rentals Online Help

Click on the button **Close**

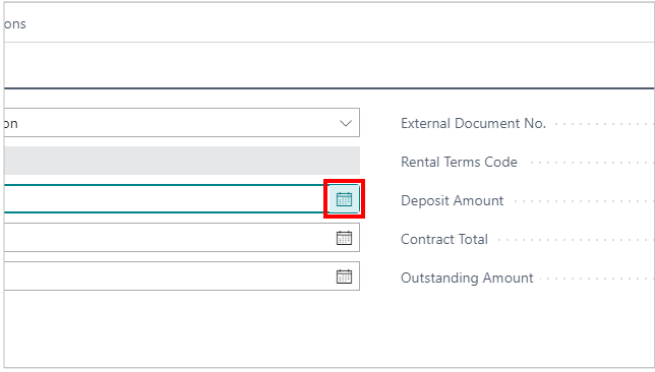


The following demonstrates the invoicing of the remaining days in the contract and the return of the Rental Units.

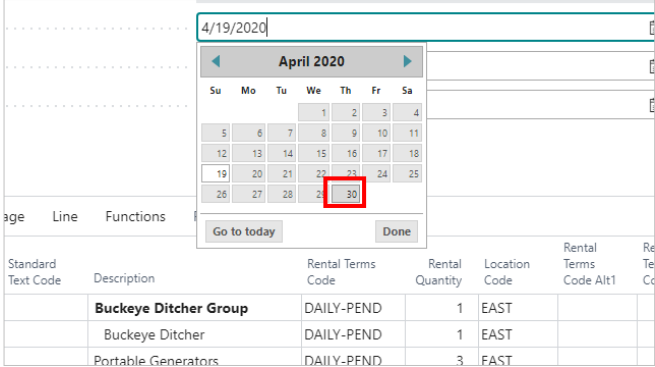
Click on the field **Posting Date**



Click on the link **Open the date picker**



Click on a date in the calendar





Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/19/2020

Rental Contract · RC00002

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/30/2020

Click on the navigation menu item **Invoice**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/19/2020

Rental Contract · RC00002

Contract **Rental** Actions Navigate Fewer options

Rentals

Customer Name Adatum Corporation

Posting Date 4/30/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

							Alt1 Rental Unit Price	Alt2 Rental Unit Price	Unit Price
1	EAST	4/6/2020	4/30/2020	300.00	0.00				
3	EAST	4/6/2020	4/30/2020	25.00	0.00				

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

							Alt1 Rental Unit Price	Alt2 Rental Unit Price	Unit Price
1	EAST	4/6/2020	4/30/2020	300.00	0.00				
3	EAST	4/6/2020	4/30/2020	25.00	0.00				



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Alt1 ntal rice	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Re
.00	0.00		SUPPLIES	0	0	0	
.00	0.00		SUPPLIES	0	1	0	
.00	0.00		SUPPLIES	0	3	0	

Enter the text **1**.

Alt1 ntal rice	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Re
.00	0.00		SUPPLIES	0	0	0	
.00	0.00		SUPPLIES	0	1	1	
.00	0.00		SUPPLIES	0	3	0	

Click on the cell **Qty. to Return** with the value **0**

Alt1 ntal rice	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Re
.00	0.00		SUPPLIES	0	0	0	
.00	0.00		SUPPLIES	0	1	1	
.00	0.00		SUPPLIES	0	3	0	

Enter the text **3**.

Alt1 ntal rice	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Re
.00	0.00		SUPPLIES	0	0	0	
.00	0.00		SUPPLIES	0	1	1	
.00	0.00		SUPPLIES	0	3	3	



Due to the late return being over the Linked Term Time Tolerance setup of 15 minutes on Rental Management Setup, the pricing calculation will update the Unit Price Excl. Tax and other price fields, in the Rental Amount Lines to the 8 HR rate.

The cascade to the 8 HR rate occurs as the 8 HR rental term is the term populated on the 4 HR term card in the Linked Term field.

On Rental Management Setup, the field, Linked Term Time Tolerance has a setting of 15 minutes, which means a customer can return the units up to 15 minutes late, without incurring additional rental charges.

The customer will be billed at the end of the contract, on return of the units.

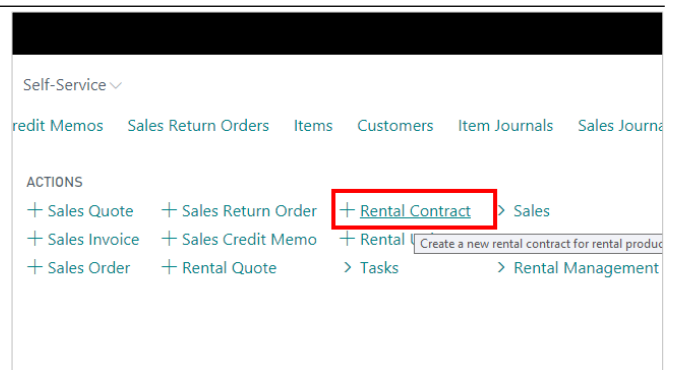
The setups completed for this example included the setting up of:

- Rental Periods having duration of 2 hours, 4 hours and 8 hours
- Rental Terms for 2 HRs, 4 HRS, 8 HRS, DAY-END-OPT-TIME, WEEK-END-OPT-TIME and MONTH-END-OPT. The day, week and month rental terms must have the Rental Date Time Tracking field set to Track Date and Time
- Creation of a Rental Unit Group with a Minimum Rental Duration set to 1 minute
- Creation of units with a Minimum Rental Duration set to 1 minute and linking them to the group
- Adding Rental Prices to the Rental Unit Group created for the Rental Term noted above
- Entering a Time Tolerance of 15 Minutes in the Linked Term Tolerance field on Rental Management Setup

3.4.9.1. Creating a new Rental Contract for Hybrid Hourly Billing

In this example, the Rental Contract command bar has been pinned to show the sub menu options automatically.

Click on the navigation menu item **Rental Contract**





Click on the field **Sell-to Customer Name**

The screenshot shows the 'Proforma' form with a navigation bar at the top containing 'Rental', 'Actions', 'Navigate', and 'Less options'. Below the navigation bar, the 'Sell-to Customer Name' field is highlighted with a red box. To the right of this field are several other fields with calendar icons, labeled 'Extra', 'Ren', 'Dep', 'Cor', and 'Out'.

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Select the customer that this contract is for.

The screenshot shows the 'General' form with a dropdown menu for 'Sell-to Customer Name'. The dropdown is open, showing a list of customers. The first entry, '10000 Adatum Corporation', is highlighted with a red box. Other entries include '20000 Terry Research', '30000 School of Fine Art', '40000 Alpine Ski House', and '50000 Relecloud'. The 'Print...' and 'Print Proforma' buttons are visible at the top.

Click on the field **External Document No.**

If the customer has provided an external document number, then click on the field External Document No. field and enter it.

The screenshot shows the 'Rental Lines' form with a table of rental items. The 'External Document No.' field is highlighted with a red box. Below this field is a dropdown menu showing 'MONTH-PEND'. To the right of the table are columns for '0.00' and '0.00'.

Click on the field **Rental Terms Code**

When a Rental Terms Code has been setup on a Customer card, it will default to this field. The term can be changed should the contract be for a different pricing schema by looking up and selecting the applicable Rental Term.

The term will automatically populate the Rental Terms Code field on the Rental Lines, when Rental Management Setup does not have the field, Use Unit Rental Terms checked and the Rental Unit does not have a default Rental Term Code specified.

The screenshot shows the 'Rental Lines' form with a dropdown menu for 'Rental Terms Code'. The dropdown is open, showing a list of terms. The first entry, 'MONTH-PEND', is highlighted with a red box. Other entries include '0.00', '0.00', and '0.00'.



Click on the link

MONTH-PEND

0.0 Look up value

0.00

0.00

Click on **Code = 4 HR, Description = 4 Hour Rental - End Billing**

CODE	DESCRIPTION
2 HR	2 Hour Rental - End
4 HR	4 Hour Rental - End
8 HR	8 Hour Rental - End
DAY-END	Daily Rental for Billing
DAY-END-OPT	Daily Rental for Opti
DAY-END-OPT -TIME	Dailv Rental for Opti

+ New

Click on the field **Deposit Amount**

Should a deposit be required from the Customer, enter the amount in the Deposit Amount field.

Once the Rental Lines fields are completed the Contract Total and Outstanding Amount fields will automatically be populated.

CODE	DESCRIPTION
4 HR	4 Hour Rental - End
	0.00
	0.00
	0.00

3.4.9.2. How to Add Time fields to Rental Lines

As the Hybrid Hourly pricing is based on time the Rental Start Time and Rental Return Time fields will need to be added to the columns on the Rental Lines.

This will enable the entry of the time the rental is to start and the time the unit(s) are expected to be returned.

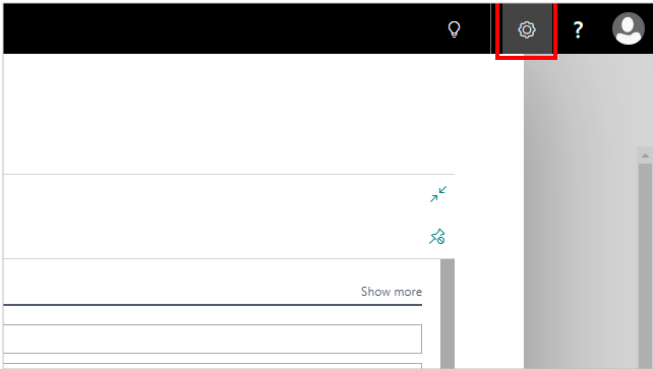
It is recommended to add the fields to be displayed next to the Rental Start Date and Rental Return Date respectively.

The following steps will guide you through adding these fields to the Rental Lines.

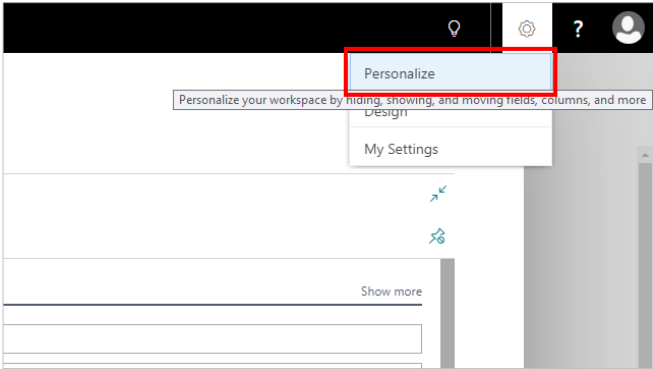


ODT Rentals Online Help

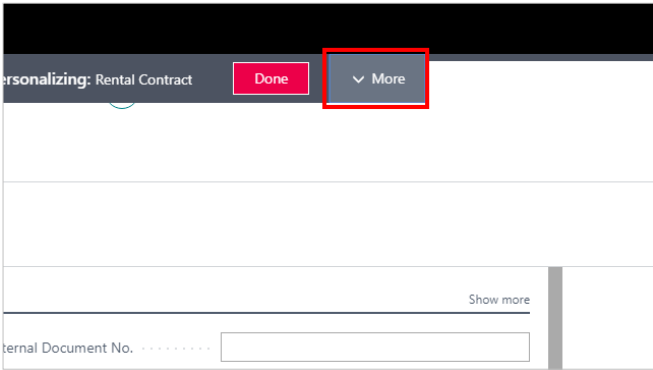
Click on the link **Settings**



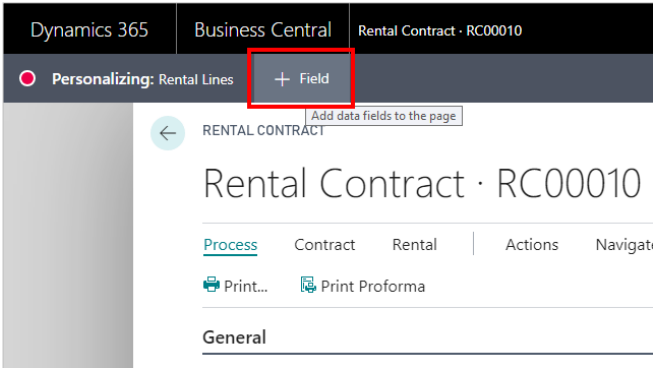
Click on the menu item **Personalize**



Click on the link **More**



Click on the link **Field**



Click on the data brick **Caption = Rental Start Time**

Drag the field to where the field is to be dropped, which will be indicated by a thick red line.

It is recommended that this field be placed directly to the right of the Rental Start Date.

DateTime	Rental Return Date-Time	Ready
Boolean	Sub Rental	Ready
Code	Sub Rental Purch. Order No.	Ready
Time	Rental Start Time	Ready
Time	Rental Return Time	Ready
Date	Rental Billing Start Date	Ready

Click on the data brick **Caption = Rental Return Time**

Drag the field to where the field is to be dropped, which will be indicated by a thick red line.

It is recommended that this field be placed directly to the right of the Rental Return Date.

Boolean	Sub Rental	Ready
Code	Sub Rental Purch. Order No.	Ready
Time	Rental Start Time	Ready
Time	Rental Return Time	Ready
Date	Rental Billing Start Date	Ready
Date	Rental Billing End Date	Ready

The fields can be resized by moving the thick red line in the direction desired. Left to reduce the width of the field and right to expand the width of the field.

Click on the link **Done**

Clear personalization	Done	Less
Add Field to Page		
Place fields by dragging from the list to a position on the page.		
DateTime	Rental Start Date-Time	Ready
DateTime	Rental End Date-Time	Ready

3.4.9.3.

Entering a Rental Unit Group on the Rental Lines

In this example, the Rental Lines command bar has been pinned to show the sub menu options automatically.

Click on the cell **Rental Unit No.**

Rental Lines	Manage	More options
New Line	Delete Line	Expand All
Collapse All		
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
Sales Lines	Manage	More options



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines			Manage	More options	
New Line			Delete Line	Expand All	Collapse All
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION			
Look up value					
Sales Lines			Manage	More options	

Click on the link in cell **No.** with the value **RU00012**

Select the Rental Unit group that contains the Rental Units you wish to rent out

RU00011	Power Shovel Group	<input checked="" type="checkbox"/>
RU00011-001	Power Shovel	<input type="checkbox"/>
RU00011-002	Power Shovel	<input type="checkbox"/>
RU00011-003	Power Shovel	<input type="checkbox"/>
RU00011-004	Power Shovel	<input type="checkbox"/>
RU00011-005	Power Shovel	<input type="checkbox"/>
RU00012	Cut-Off Gasoline Saw GRP - Hybrid	<input checked="" type="checkbox"/>
Select record "RU00012"		
RU00014	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>
RU00015	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>
RU00016	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>
RU00017	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>

Click on the cell **Rental Terms Code**

The Rental Term Code field may be automatically populated depending on the setups selected on Rental Management Setup, Rental Units and the Customer.

If the Rental Term Code field is either blank or contains a rental term that is not the desired term, then you can select the term that is applicable to this rental.

Manage			More options		
Delete Line			Expand All	Collapse All	Group Avail Matrix
STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	
	Cut-Off Gasoline Saw GR...	2 HR	0		
Manage			More options		
UNIT OF					

Click on the lookup button in the cell **Rental Terms Code**

More options					
Expand All			Collapse All	Group Avail Matrix	
STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Cut-Off Gasoline Saw GR...	2 HR	0		
Look up value					
More options			UNIT OF		



ODT Rentals Online Help

Click on **Code = 4 HR, Description = 4 Hour Rental - End Billing**

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTA TERMS CODE A
	Cut-Off Gasoline Saw GR...	2 HR	0		
		<div>CODEDESCRIPTION</div> <div>2 HR2 Hour Rental - End</div> <div>4 HR4 Hour Rental - End</div> <div>8 Select record "4 HR"8 Hour Rental - End</div> <div>DAY-ENDDaily Rental for Billir</div> <div>DAY-END-OPTDaily Rental for Opti</div> <div>DAY-END-OPT TIMEDaily Rental for Opti</div> <div>+ New</div>			

Click on the cell **Rental Quantity**

More options

Expand AllCollapse AllGroup Avail Matrix

D E	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Cut-Off Gasoline Saw GR...	4 HR	0		

More options

UNIT OF

Enter the text **2**.

More options

Expand AllCollapse AllGroup Avail Matrix

D E	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Cut-Off Gasoline Saw GR...	4 HR	2		

More options

UNIT OF

Click on the cell **Location Code**

Should your organization be tracking rentals by location, then select a location.

If on Rental Management Setup, the field Location Mandatory be checked, then in order to process the rental the Location Code must be entered.

More options

Expand AllCollapse AllGroup Avail Matrix

ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
isoline Saw GR...	4 HR	2				4/

More options

UNIT OF



ODT Rentals Online Help

Click on **Code = EAST, Name = East Warehouse**

Select the location from which the rental will occur.

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Saw GR...	4 HR	2			4/9/2018

CODE

EAST

Select record "EAST"

WEST

+ New

NAME
East Warehouse
Inventory Items Re
West Warehouse

LOCATION CODE	QUANTITY	CODE	EXCL. TAX	CODE	EX
	0		0.00	*	

Click on the cell **Rental Start Time**

The Start Time defaults the current time that the line was entered.

Should the Start Time be different, then enter the time the rental is to commence.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENT
		4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	

Type the date in the format M/d/yyyy

Click on the cell **Rental Return Time**

The Rental Return Time will be calculated as 4 hours less 1 minute (based on the Rental Unit field, Minimum Rental Duration of 1 minute).

As the actual time the units will be returned is not know for sure, the recommendation is to leave the Rental Return Time as the defaulted time. The actual time of return is to be entered when the units are returned.

RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALT1 REN UNIT PF
4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	

Click on the cell **Rental Unit Price**

The Rental Unit Price defaults from the Rental Price card when setup on the Rental Unit group.

The Rental Unit Price can be overridden, if need be, and will be used in determining the amount that will be billed to the customer.

Should there not be a Rental Price card setup on the group, then the Rental Unit Price can be entered manually on the line.

RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALT1 REN UNIT PF
2:19:01 PM	4/9/2018	6:19:00 PM	45.00	

As a group has been entered on the rental line, then the additional child rental lines will automatically be created based on the Rental Quantity entered.

These child lines are for the selection of the individual units assigned to the rental group. The selection of the child units is required on a Rental Contract.

When selecting the units on the child lines, the list of units will be filtered based on the Location Code entered on the rental group line.



Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
			New Line	Delete Line Expand All Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00012		Cut-Off Gasoline Saw G...		
		Cut-Off Gasoline Saw G...		
		Cut-Off Gasoline Saw G...		

Click on the lookup button in the cell **Rental Unit No. lookup button**

Rental Lines			Manage	More options
			New Line	Delete Line Expand All Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00012		Cut-Off Gasoline Saw G...		
		Cut-Off Gasoline Saw G...		
		Cut-Off Gasoline Saw G...		

Click on the link in cell **No.** with the value **RU00013**

Select the Rental Unit in the group which is to be rented.

Sales Lines			Manage	More options
			Edit View	
RENTAL UNIT LIST + New				
NO.	DESCRIPTION	GROUP		
RU00013	Cut-Off Gasoline Saw - Hybrid			
RU00015	Cut-Off Gasoline Saw - Hybrid			
RU00016	Cut-Off Gasoline Saw - Hybrid			
RU00017	Cut-Off Gasoline Saw - Hybrid			

Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
			New Line	Delete Line Expand All Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00012		Cut-Off Gasoline Saw G...		
RU00013		Cut-Off Gasoline Saw - ...		
		Cut-Off Gasoline Saw G...		



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Click on the link in cell **No.** with the value **RU00014**

Select the Rental Unit in the group which is to be
rented.

Repeat the above steps to add additional Rental Units
or Rental Unit Groups to the Rental Contract.

3.4.9.4. Reviewing the Rental Amount Lines

Review the Rental Amount lines for the each of the
child rental units and if entered, units not linked to a
group, to verify the expected rental billings, including
the amounts and the Billing Date in the Rental
Amounts lines.

For information on the Rental Amount Line fields, see
the ODT Rental Online help, Processing Rentals,
Rental Quote Overview.

Select one of the child Rental Lines.

Click on the navigation menu item **More options**



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote NO.
Posting Date 4/9/2018
Order Date 4/9/2018
Document Date 4/9/2018

Rental Lines | Manage | **Line** | Functions | Less options

New Line Delete Line Expand All Collapse All Group

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00012		Cut-Off Gasoline Saw G...	4 HR

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/9/2018
Document Date 4/9/2018

Rental Lines | Manage | Line | Functions | Less

Rental Amount Lines Rental Ledger Entries

View the rental amount line records that will be billed for the

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00012		Cut-Off Gasoline Saw G...
RU00013		Cut-Off Gasoline Saw - ...

Click on the cell **Unit Price Excl. Tax** with the value **45.00**

Note that the Unit Price Excl. Tax is the same as the Rental Unit price on the Rental Line.

ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	CU
4/9/2018 6:18 PM	1	45.00	45.00	

Click on the button **Close**

45.90 SUPPLIES 4/9/2018

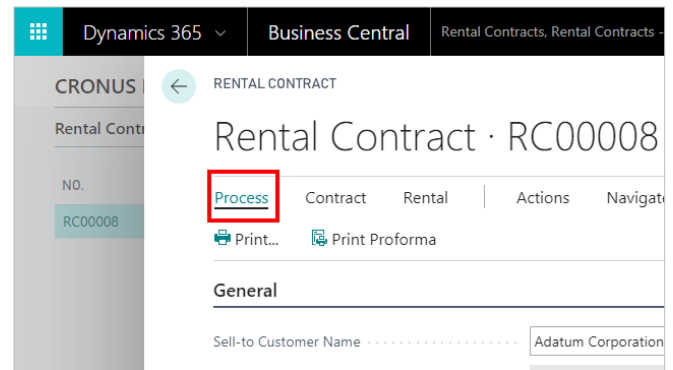
Close

91.80

3.4.9.5. Printing the Rental Contract

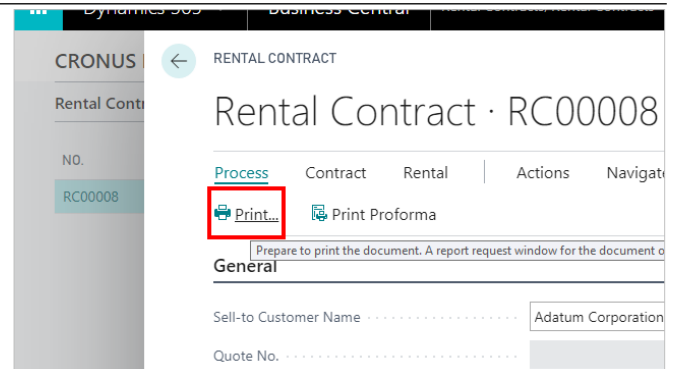
The Rental Contract can be previewed, printed or emailed to the customer.

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract' screen for contract RC00008. The 'Process' button is highlighted with a red box. Other buttons visible include 'Print...', 'Print Proforma', 'Contract', 'Rental', 'Actions', and 'Navigate'.

Click on the navigation menu item **Print...**

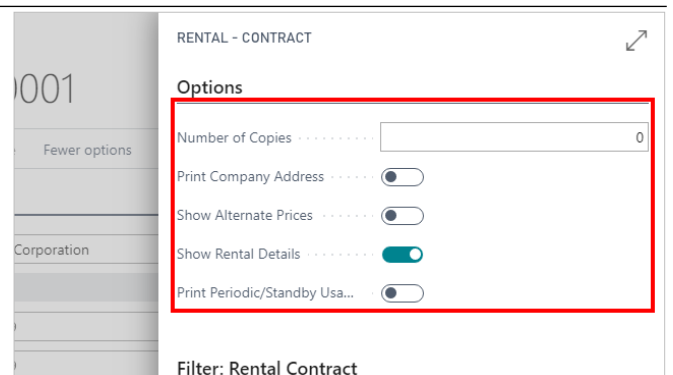


The screenshot shows the 'Rental Contract' screen for contract RC00008. The 'Print...' button is highlighted with a red box. Other buttons visible include 'Process', 'Contract', 'Rental', 'Actions', and 'Navigate'. A message below the buttons says: 'Prepare to print the document. A report request window for the document o'.

Options tab

For information on the printing request page, Option tab fields, point to the field name.

For additional information on the fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.



The screenshot shows the 'Options' tab for the 'Rental - CONTRACT'. The 'Options' section is highlighted with a red box. It contains the following fields and controls:

- Number of Copies: 0
- Print Company Address: ☐
- Show Alternate Prices: ☐
- Show Rental Details: ☒
- Print Periodic/Standby Usa...: ☐

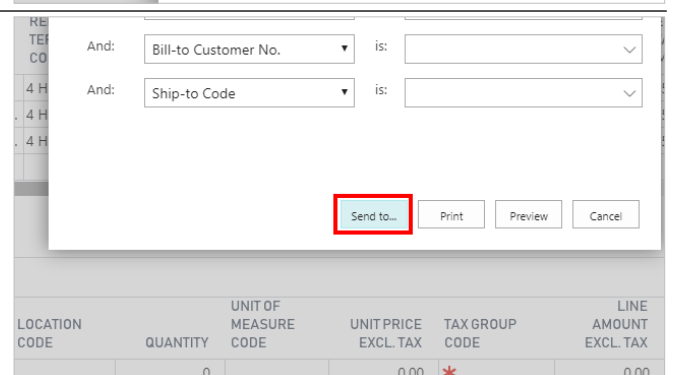
Filter: Rental Contract

Should your organization require the contract to be printed instead of saved as a PDF document, then instead of selecting the Send to option, select Print.

Click on the button **Send to...**

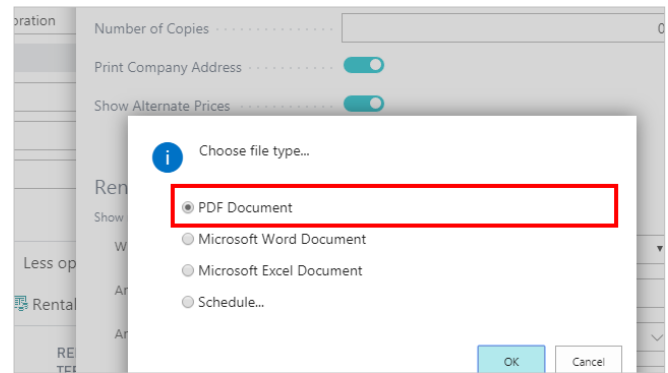
In the page that opens, PDF is selected by default, as this is the only type to be used for rental documents.

Then select the OK button.



The screenshot shows the 'Send to' dialog box. The 'Send to...' button is highlighted with a red box. Other buttons visible include 'Print', 'Preview', and 'Cancel'. The dialog box also contains fields for 'And: Bill-to Customer No.' and 'Ship-to Code'.

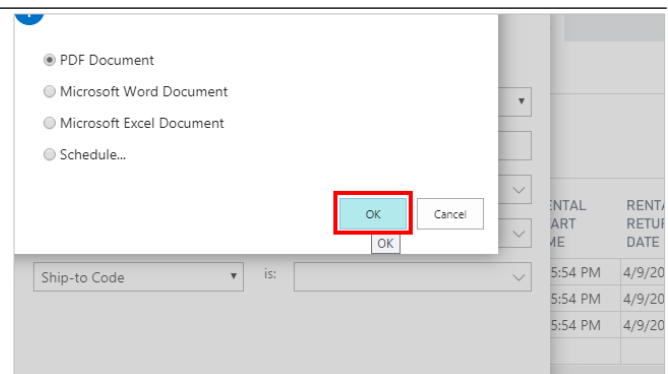
Click on the item **PDF Document**



When PDF document is selected and OK is clicked on, then the file for the pdf document will show at the bottom left on the window.

Click on the file to open the pdf file. On the open file save the contract to the location where the document is to be saved to or print the file, if applicable.

Click on the button **OK**



3.4.9.6. Shipping the Rental Units

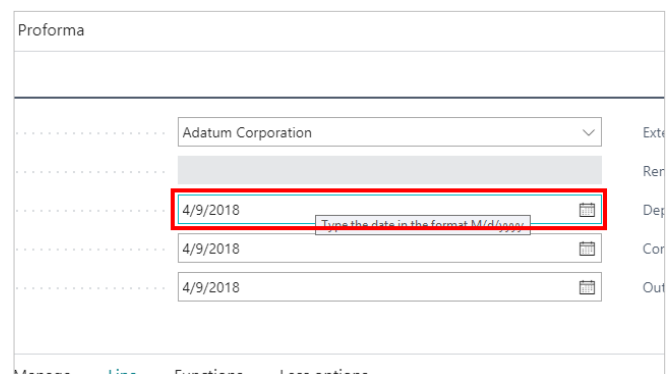
Rentals provides the ability to review the pending shipments for a contract, directly from the contract, by selecting Show Pending Rental Shipments in the Actions, Filtering command bar option at the top of the contract.

A listing of all rental units entered, however, not shipped is provided.

NOTE: Sales lines, pending shipments are not included in the listing.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the shipment is occurring on.





Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open

← RENTAL CONTRACT

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate

Print... Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central Rental Contracts, Rental Contracts - Open

← RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigate

Ship Rentals Return Rentals Invoice Invo

Post the shipment of the rental units on the rental lines. A posted delivery

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

Contract Total

Outstanding Amount

? Are you sure you want to Ship this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
2	EAST			4/9/2018	2:19:01 PM	4/9/2018
1	EAST			4/9/2018	2:19:01 PM	4/9/2018

Click on the button **OK**

Contract Total

Outstanding Amount

Shipment Posted Successfully.

OK

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
2	EAST			4/9/2018	2:19:01 PM	4/9/2018	6:19:01 PM
1	EAST			4/9/2018	2:19:01 PM	4/9/2018	6:19:01 PM

Click on the cell **Qty. on Rent** with the value **1**

Note that on the child rental lines the Qty. to Rent was updated to display 0 and the Qty. on Rent was updated with 1.

Value Entries					
Additional Notes					
Dimensions					
ALT2 RENTAL UNIT PRICE	CURRENCY CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED
0.00		0	0	0	0
0.00		0	1	0	0
0.00		0	1	0	0

Review of the posted shipment can be done directly from the Rental Contract card by selecting the Posted Deliveries in the Rental command.

The Posted Delivery card rental lines contain the records related to the shipped Rental Units.

The Posted Delivery can as well be printed by clicking on the Process option, then the Print option on the Posted Deliveries list or the card.

3.4.9.7. Returning the Rental Units

Rentals provides the ability to review the pending returns for a contract, directly from the contract, by selecting Show Pending Rental Returns in the Actions - Filtering command bar option.

A listing of all rental units on rent is provided.

In this example the returns are being returned before the invoicing of the contract and the return will be 20 minutes late.

Alternatively, the return can be processed before the contract is invoiced.

Click on the field **Posting Date**

Verify the Posting Date is set to the date the rental units are being returned.

Return Rentals
Invoice
Invoice and Print
Posted Deliveries
Post

Adatum Corporation

4/9/2018

4/9/2018

4/9/2018

Manage
Line
Functions
Less options

Click on the cell **Rental Return Time**

As the return of the units is 20 minutes late, the Rental Return Time must be changed to the actual time the units were returned.

LT2	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PF
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	



Enter the text **6:39 PM**. Press the **Arrow down** key.

LT2	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALTI REN UNIT PF
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	
	4/9/2018	2:19:01 PM	4/9/2018	6:19:00 PM	45.00	

When the Rental Return Time is changed to be later than the defaulted time, then it is highly recommended that the Rental Amount Lines be reviewed to verify the updating of the Unit Price Excl. Tax.




When units are returned later than the Linked Term Time Tolerance specified on Rental Management Setup, the Unit Price Excl. Tax will be updated to reflect the cascading price to the next linked term.

Click on one of the child unit lines.

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	4/9/2018
Order Date	4/9/2018
Document Date	4/9/2018

Rental Lines	Manage	Line	Functions	Less options
--------------	--------	------	-----------	--------------

 Rental Amount Lines	 Rental Ledger Entries	 Rental Value Entries
---	---	--

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00012		Cut-Off Gasoline Saw G...	4 HR.

Click on the navigation menu item **Rental Amount Lines**

RU00012	Cut-Off Gasoline Saw G...	4/9/2018
Order Date		4/9/2018
Document Date		4/9/2018
<div><div>Rental Lines</div><div>Manage</div><div>Line</div><div>Functions</div><div>Less</div></div>		
<div><div></div><div>Rental Amount Lines</div></div>	<div><div></div><div>Rental Ledger Entries</div></div>	<div><div></div><div>Rental Value Entries</div></div>
View the rental amount line records that will be billed for the selected re		
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00012		Cut-Off Gasoline Saw G...
RU00013		Cut-Off Gasoline Saw - ...

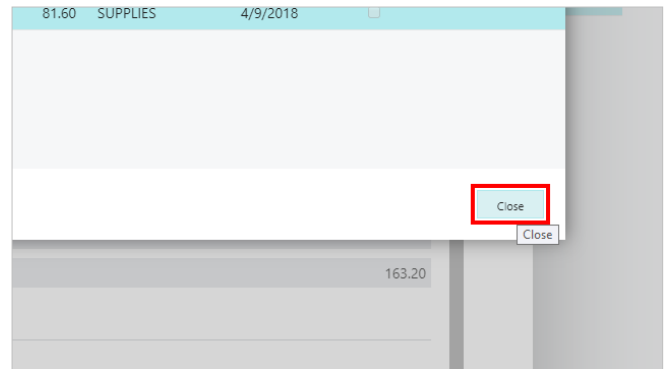
Click on the cell **Unit Price Excl. Tax** with the value **80.00**

Note that the Unit Price Excl. Tax has been updated to reflect the price setup on the 8 HR price card on the Rental Unit Group.
All related pricing calculation used this updated price.

ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	CU
4/9/2018 6:38 PM	1	80.00	80.00	

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Click on the button **Close**



In this example all rental units are being returned.

The Qty. To Return must be completed for each rental unit being returned.

Rental Unit group lines do not require this field to be populated.

Click on the cell **Qty. to Return**

Additional Notes Dimensions					
CURRENCY CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
	0	0	0	0	0
	0	1	0	0	0
	0	1	0	0	0

Enter the text 1.

Additional Notes Dimensions					
CURRENCY CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
	0	0	0	0	0
	0	1	1	0	0
	0	1	0	0	0


Click on the cell **Qty. to Return**

Additional Notes Dimensions					
CURRENCY CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
	0	0	0	0	0
	0	1	1	0	0
	0	1	0	0	0



Enter the text **1**.

Additional Notes



Dimensions

CURRENCY CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
	0	0	0	0	0
	0	1	1	0	0
	0	1	<div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> 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Click on the navigation menu item popup **Rental**

Dynamics 365Business Central

Rental Contracts, Rental Contracts - Open

←

RENTAL CONTRACT

Rental Contract · RC000008

ProcessContract

Rental

ActionsNavigate

Ship Rentals

Return Rentals

Invoice

Invoice and I

General

Sell-to Customer NameAdatum Corporation

Click on the navigation menu item **Return Rentals**

Dynamics 365Business Central

Rental Contracts, Rental Contracts - Open

←

RENTAL CONTRACT

Rental Contract · RC000008

ProcessContract

Rental

ActionsNavigate

Ship Rentals

Return Rentals

Invoice

Invoice and I

General

Post the return of the rental units on the rental I

Sell-to Customer NameAdatum Corporation

Quote No.

Click on the button **Yes**

Contract Total

Outstanding Amount

?

Are you sure you want to Return this rental contract?

YesNo

TAL

CURRENCY

ICE

CODE

QTY. TO RENT

QTY. ON RENT

QTY. TO RETURN

QTY. RETURNED

DISCOUN

0.00

0

0

0

0

0.00

0

1

1

0




Click on the button **OK**

QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...
0	0	0	0	0	0
0	1	1	0	0	0

Click on the cell **Qty. Returned** with the value **1**

Note that the Qty. on Rent is set to 0 for the units returned and the Qty. Returned now shows 1 for each unit returned.

Notes  Dimensions

QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	ODT TRANS ORDER NO.
0	0	0	0	0	<input checked="" type="checkbox"/>	
0	0	0	1	0	<input checked="" type="checkbox"/>	
0	0	0	1	0	<input checked="" type="checkbox"/>	
			1		<input type="checkbox"/>	

The Posted Rental Return can be viewed and printed, if desired, from the Posted Documents when using the Sales Order Processor Profile.

When using the Business Manager Profile the Posted Rental Return can be located in the Rentals option.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.9.8. Invoicing the Rental Contract

Prior to invoicing the contract, the Proforma Invoice can be printed or previewed by going to the menu option Process, then Print Proforma.

The Proforma Invoice is a pre-invoice, which provides the ability to review what will be billed to the Customer based on a specified Cut-Off Date.

NOTE:

The Proforma Invoice will only include the unit which have been shipped and are slated to be billed based on the Cut-Off Date. The Proforma will capture only those Rental Amount Lines with a Billing Date equal to or earlier than the Cut-Off Date specified and have not been invoiced.

In this example, the Rental Term has an Invoicing Type of End.

When using a Rental Term with the Invoicing Type of End, the invoicing and the return of the rental units can be done either separately or at the same time.

If doing the processes separately, they can be done by invoicing the contract, then returns or returns, then invoicing the contract.

In this example, the invoicing is being done and then the return of the units.

ODT Rentals Online Help

As the Hybrid Hourly pricing is based on time, from start time to end time, the Rental Return Time field is used in the calculation of the amount to be billed to the Customer.

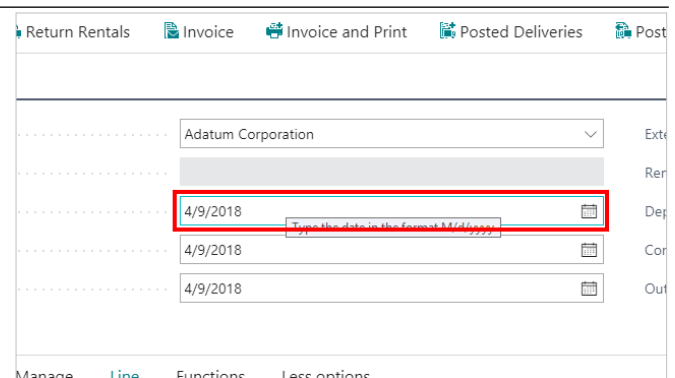
The Rental Return Time must be set to the actual time the unit(s) are returned prior to processing the invoice, if processing the invoice before returning the units as outlined in the previous chapter.

When the following steps are completed, the Rental Contract will close and will be available in the Completed Rental Contracts as both the return and the invoicing of this contract will have occurred.

Please see Reviewing Rentals - Completed and Posted Rental Documents in the ODT Rentals Online Help site for information on Completed Rental Contracts.

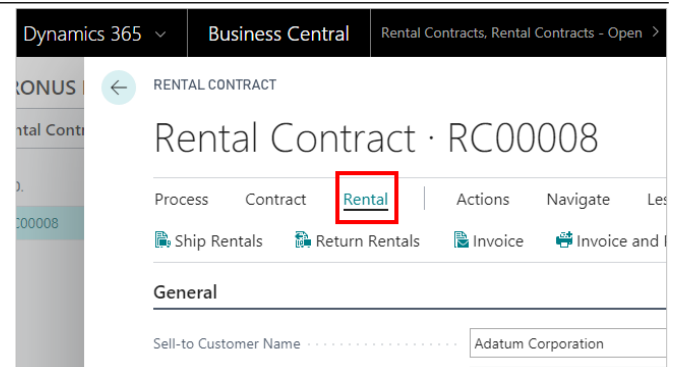
Click on the field **Posting Date**

Ensure the Posting Date is the correct date.



The screenshot shows the 'Return Rentals' form in Dynamics 365 Business Central. The 'Posting Date' field is highlighted with a red box. The date '4/9/2018' is entered in the field. A tooltip message says 'Type the date in the format MM/DD/YYYY'.

Click on the navigation menu item popup **Rental**



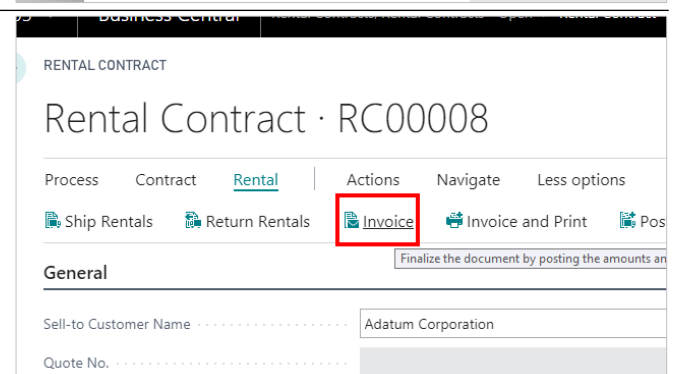
The screenshot shows the 'Rental Contract' form in Dynamics 365 Business Central. The 'Rental' menu item is highlighted with a red box. The contract number 'RC00008' is visible.

Click on the navigation menu item **Invoice**

Should you wish to print the invoice at the time of invoicing the contract, then select the Invoice and Print option in the Rental command bar option.

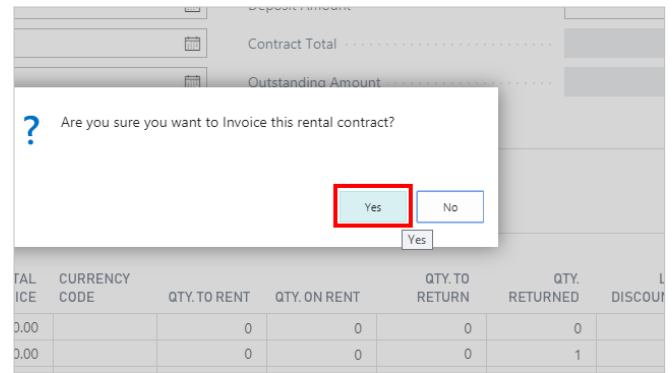
When using Invoice and Print, the system will use the Saved options from the last time a Posted Rental Invoice was printed.

Thus if from a Completed Rental Contract - Posted Invoices, an invoice was printed the options specified at that time will be used when running Invoice and Print from an open Rental Contract. These options include Number of Copies, Print Company Address and Show Rental Details.



The screenshot shows the 'Rental Contract' form in Dynamics 365 Business Central. The 'Invoice' menu item is highlighted with a red box. The contract number 'RC00008' is visible.

Click on the button **Yes**



For a user in the Sales Order Processor Profile, to review the Posted Rental Invoice, go to the Posted Documents menu option and select Posted Rental Invoices.

For a user in the Business Manager Profile, to review the Posted Rental Invoice, go to Rentals menu option and select Posted Rental Invoices.

The Posted Rental Invoice can be printed from the invoice card.

3.4.10. How to Process Contracts for Early Billing

3.4.10.1. Overview

In order to process early invoices the Rental Price for the terms setup with an Early Billing Date Formula can be setup on the Rental Unit or Rental Unit Group cards or the price can be manually entered on the Rental Line(s).

In this scenario, the Rental Price will be setup on a Rental Unit Group card.

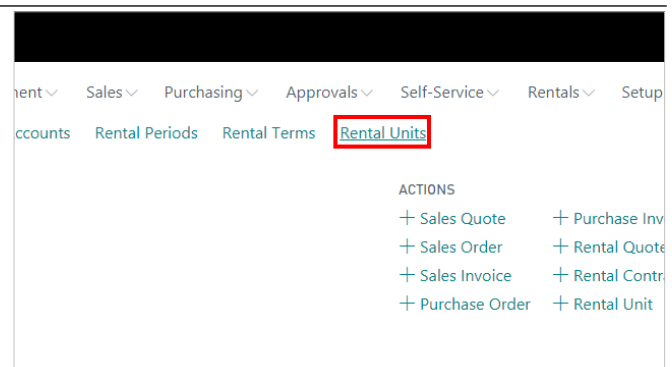
To learn about setting up Rental Terms for Early Billing, see the ODT Rentals Online help, Rental Setups, Setup Rental Terms, How to Set Up Rental Terms for Early Billing.

3.4.10.2. Setting up Rental Prices for the Early Billing Terms

Profile Business Manager

The following steps demonstrate the setup of the Rental Prices on a Rental Unit group for the Rental Terms setup with an Early Billing Date Formula to be used in the contract processing example.

Click on the navigation menu item **Rental Units**





Click on the link in cell **No.** with the value **RU00001**

Rental Units: All				Search	+ New	Manage	Process	Rental
NO.		DESCRIPTION	GROUP					
PG-001	:	Portable Generators						
BD-006	:	Buckeye Ditcher						
RU00001	:	Buckeye Ditcher Group						
RU00001 Open record "RU00001" in a new window				Ditcher				
RU00003	:	Buckeye Ditcher						
RU00004	:	Buckeye Ditcher						
RU00005	:	Buckeye Ditcher						

Click on the navigation menu item popup **Rental**

Dynamics 365		Business Central	Rental Units > RU00001 · Buckeye Ditcher Group	
CRONUS		←	RENTAL UNIT CARD	
Rental Units			RU00001 · Buckeye Ditcher	
NO.			Process	Rental
PG-001			Page	Actions
BD-006				Navigate
RU00001			Copy Rental Unit...	
RU00002			General	
RU00003			No. RU00001	

Click on the navigation menu item **Rental Prices**

Dynamics 365		Business Central	Rental Units > RU00001 · Buckeye Ditcher Group	
CRONUS		←	RENTAL UNIT CARD	
Rental Units			RU00001 · Buckeye Ditcher	
NO.			Process	Rental
PG-001			Page	Actions
BD-006				Navigate
RU00001			Rental Prices	Attributes
RU00002			Additional Notes	
RU00003			Set up different rental prices. A rental price is automatically granted on rental line.	
RU00004			General	
			No. RU00001	
			Description Buckeye Ditcher Group	

Click on the navigation menu item **New**

Dynamics 365		Business Central	Rental Units > RU00001 · Buckeye Ditcher Group	
CRONUS		←	RU00001 · BUCKEYE DITCHER GROUP	
Rental Units		←	Rental Price List	
NO.			Search	+ New
PG-001			Manage	Open in Excel
BD-006			Create a new entry.	
RU00001			RENTAL TERMS	
RU00002			CODE PERIOD CODE STARTING DATE	
RU00003			DAY-END-OPT DAY	
RU00004			MONTH-END MONTH	



ODT Rentals Online Help

Click on the field **Rental Terms Code**

RU00001

MONTH-PEND-EARLY

0.00

Never

Click on **Code = MONTH-PEND-EARLY, Description = Monthly Rental - Early Per. Billing in Arrears**

RU00001

MONTH-PEND-EARLY

0.00

Never

Click on the field **Price**

RU00001

MONTH-PEND-EARLY

5000.00

Never

Enter the text **5000.00**.

RU00001

MONTH-PEND-EARLY

5000.00

Never



Click on the field **Tax Group Code**

Click on **Code = SUPPLIES, Description = Taxable Olympic Supplies**

Click on the back button

Click on the navigation menu item **New**



Click on the field **Rental Terms Code**

RU00001

0.00

Never

Click on **Code = MONTH-PSTART-EARLY**,
Description = Monthly Rental - Early Per. Billing in Advance

RU00001

Terms Code

ng Date

g Date

nize

age Waiver

CODE	DESCRIPTION
MONTH-PSTART	Monthly Rental - Per
MONTH-PSTART-EA...	Monthly Rental - Ear
MONTH	Select record "MONTH-PSTART-EARLY" for E
WEEK-END	Weekly Rental for Bi
WEEK-END-OPT	Weekly Rental for O
WEEK-END-OPT-TIME	Weekly Rental for O

+ New

Click on the field **Price**

RU00001

MONTH-PSTART-EARLY

0.00

Never

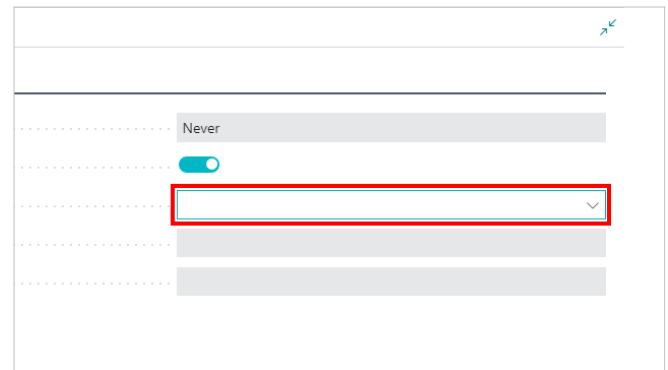
Enter the text **5000.00**.

RU00001

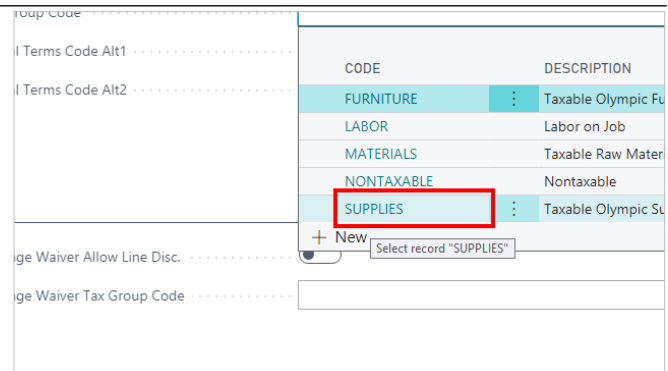
MONTH-PSTART-EARLY

Never

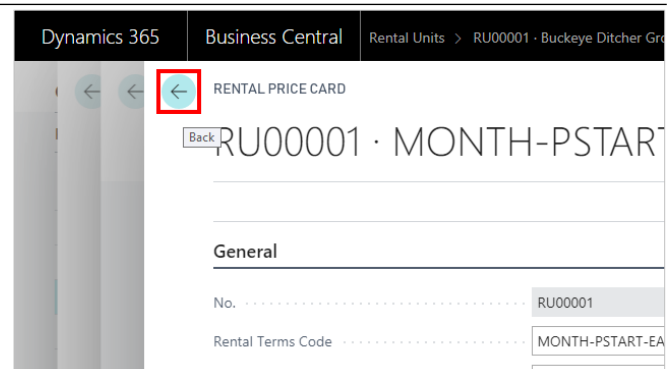
Click on the field **Tax Group Code**



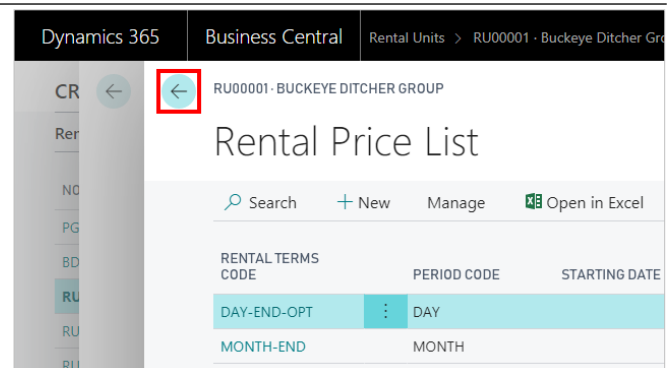
Click on **Code = SUPPLIES, Description = Taxable Olympic Supplies**



Click on the back button



Click on the back button



3.4.10.3. How to Process the Invoice for Early Billing

The following example demonstrate the processing of a contract using early billing and displays the results.

The steps in the example consist of the following:

- A contract will be created for two rental periods using the monthly periodic end term previously setup with an Early Billing Date Formula of 5D (5 days). The contract will have an Order Date and Shipping Date of April 10, 2018.
- Shipping of the contract will be done on April 10.
- The invoicing of the first invoice, with the early invoicing occurring on May 5, which is 5 days earlier than the



Billing Date of May 9 on the Rental Amount Lines.

The processing in the example has been done using the Sales Order Processor Profile.

The same steps apply to users having the Business Manager Profile.

Click on the navigation menu item **Rental Contract**

Self-Service ▾

redit Memos Sales Return Orders Items Customers Item Journals Sales Journa

ACTIONS

+ Sales Quote + Sales Return Order + **Rental Contract** > Sales

+ Sales Invoice + Sales Credit Memo + Rental Unit Create a new rental contract for rental pr

+ Sales Order + Rental Quote > Tasks > Rental Management

Click on the field **Sell-to Customer Name**

Rental Actions Navigate Less options

Proforma

Ext

Ren

Dep

Cor

Out

Click on **No. = 10000**, **Name = Adatum Corporation**, **City = Atlanta**

Print... Print Proforma

General

Sell-to Customer Name

ote No.

osting Date

der Date

cument Date

NO. NAME CI

10000 Adatum Corporation At

Select record "10000" Key Research Ch

30000 School of Fine Art Mi

40000 Alpine Ski House At

50000 Relecloud At

Rental Lines Manage More opti + New

Click on the cell **Rental Unit No.**

Rental Lines Manage More options

New Line Delete Line Expand All Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines Manage More options



Click on the lookup button in the cell **Rental Unit No.**

Rental Lines | [Manage](#) More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collaps](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
	...	
Look up value		

Sales Lines | [Manage](#) More options

Click on the link in cell **No.** with the value **RU00001**

NO. RENTAL UNIT LIST + New

RC0001

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Select record "RU00001"

Click on the cell **Rental Terms Code**

[Manage](#) More options

[Delete Line](#) [Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Manage

UNIT OF

Click on the link in cell **Rental Terms Code**

[Manage](#) More options

[Delete Line](#) [Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-P	0	

[Look up value](#)

Manage

UNIT OF



ODT Rentals Online Help

Click on **Code = MONTH-PEND-EARLY**, Description
= **Monthly Rental - Early Per. Billing in Arrears**

STANDARD TEXT CODE	DESCRIPTION	TERMS CODE	RENTAL QUANTITY	LOCATION CODE	TERMS CODE A
	Buckeye Ditcher Group	MONTH-P	0		

CODE

DESCRIPTION

MONTH-END-OPT-...

Monthly Rental for C

MONTH-PEND

Monthly Rental - Per

MONTH-PEND-EARLY

Monthly Rental - Ear

MONTH-P

Select record "MONTH-PEND-EARLY"

MONTH-PSTART-EA...

Monthly Rental - Ear

MONTH-START

Monthly Rental for E

+ New

Click on the cell **Rental Quantity**

More options

Group Avail Matrix

D E	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	ND-EARLY	0		

UNIT OF

Enter the text **2**.

More options

Group Avail Matrix

D E	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
	Buckeye Ditcher Group	MONTH-PEN...	2		

UNIT OF

Click on the cell **Location Code**

s

vail Matrix

ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-PEN...	2				4/

UNIT OF



ODT Rentals Online Help

Click on **Code = EAST**, **Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
group	MONTH-PEN...	2			4/10/20...
			CODE	NAME	
			EAST	East Warehouse	
			Select record "EAST"		
			WEST	West Warehouse	
			+ New		
LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	

Click on the cell **Rental Return Date**

As this rental is for 2 full rental periods the Rental Return Date should be changed to reflect the expected return date.

The following steps demonstrate this.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	A
✓		4/10/2018	5/9/2018	5,000.00	0.00	
Type the date in the format M/d/yyyy						
LINE AMOUNT						

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	A
		4/10/2018	5/9/2018	5,000.00	0.00	
Select a date						
LINE AMOUNT						

Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
4/10/2018	5/9/2018	5,000.00	0.00	0.00	
May 2018					
Mo Tu We Th Fr Sa Su Next					
1 2 3 4 5 6					
7 8 9 10 11 12 13					
14 15 16 17 18 19 20					
21 22 23 24 25 26 27					
28 29 30 31					
LIN AMOUN					
QUANTITY					



ODT Rentals Online Help

Click on a date in the calendar

TAL	RENTAL	RENTAL	RENTAL UNIT	ALT1 RENTAL	ALT2 RENTAL	
45	START	RETURN	PRICE	UNIT PRICE	UNIT PRICE	QTY.
E ALT2	DATE	DATE				
	4/10/2018	5/9/2018	5,000.00	0.00	0.00	

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

GROUP	LINE	AMOUNT	EXCL. TAX	QTY. TO SHIP	QUANTITY SHIPPED
		0.00	0.00	0	0

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group

Click on the lookup button in the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group

Click on the link in cell **No.** with the value **RU00002**

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	



Click on the cell **Rental Unit No.**

Buttons: New Line, Delete Line, Expand All, Collapse

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Buttons: Sales Lines, Manage, More options

Click on the lookup button in the cell **Rental Unit No.**

Buttons: New Line, Delete Line, Expand All, Collapse

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Buttons: Sales Lines, Manage, More options

Click on the link in cell **No.** with the value **RU00003**

Buttons: NO., RC0001

NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the navigation menu item **More options**

Buttons: Rental Lines, Manage, More options

Buttons: New Line, Delete Line, Reveal secondary actions, Group view matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PFN



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote NO.

Posting Date 4/10/2018

Order Date 4/10/2018

Document Date 4/10/2018

Rental Lines | Manage | **Line** | Functions | Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEN.

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/10/2018

Document Date 4/10/2018

Rental Lines | Manage | Line | Functions | Less

Rental Amount Lines Rental Ledger Entries Rental Lines

View the rental amount line records that will be billed for the selected

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **5/9/2018**

Note that the Billing Date is May 9 on the first record.

Thus for invoicing days early will be May 5.

LINE	AMOUNT	TAX GROUP	BILLING	INVOICE
AMOUNT	INCLUDING	CODE	DATE	NO.
EXCL. TAX	TAX			
5,000.00	5,100.00	SUPPLIES	5/9/2018	
5,000.00	5,100.00	SUPPLIES	6/9/24 5/9/2018	

Click on the button **Close**

SUPPLIES 5/9/2018 ☐

SUPPLIES 6/9/2018 ☐

Close

Close

g Amount 20,400.



Click on the navigation menu item popup **Rental**

amics 365 | Business Central | Rental Contract · RC00015

← RENTAL CONTRACT

Rental Contract · RC00015

Process | Contract | **Rental** | Actions | Navigate | Less

Print... | Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Ship Rentals**

amics 365 | Business Central | Rental Contract · RC00015

← RENTAL CONTRACT

Rental Contract · RC00015

Process | Contract | Rental | Actions | Navigate

Ship Rentals | Return Rentals | Invoice | Invo

Post the shipment of the rental units on the rental lines. A posted deliv

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

Contract Total
Outstanding Amount

? Are you sure you want to Ship this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/10/2018	6/9/2018	
1	EAST			4/10/2018	6/9/2018	

Click on the button **OK**

Contract Total
Outstanding Amount

ment Posted Successfully.

OK

AL	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/10/2018	6/9/2018	5,000.00
1	EAST			4/10/2018	6/9/2018	5,000.00



Click on the field **Posting Date**

The screenshot shows the 'Return Rentals' section of the ODT Rentals Online Help interface. The 'Posting Date' field is highlighted with a red box. The field contains the date '4/10/2018'. Below the field, there is a hint: 'Type the date in the format MM/dd/yyyy'. The interface also shows other fields like 'Adatum Corporation' and 'Invoice'.

Click on the link

The screenshot shows the 'Invoice and Print' section of the ODT Rentals Online Help interface. The 'Next' link is highlighted with a red box. The interface also shows other fields like 'Adatum Corporation' and 'Invoice'.

Click on the link **Next**

The screenshot shows the 'Invoice and Print' section of the ODT Rentals Online Help interface. The 'Next' link is highlighted with a red box. The interface also shows other fields like 'Adatum Corporation' and 'Invoice'.

Click on a date in the calendar

Select May 5, which 5 days earlier than the Billing Date on the Rental Amount Line for the first rental period billing.

The screenshot shows the 'Invoice and Print' section of the ODT Rentals Online Help interface. The 'Next' link is highlighted with a red box. The interface also shows other fields like 'Adatum Corporation' and 'Invoice'.



Click on the navigation menu item popup **Rental**

amics 365 | Business Central | Rental Contract · RC00015

← RENTAL CONTRACT

Rental Contract · RC00015

Process | Contract | **Rental** | Actions | Navigate | Less options

Ship Rentals | Return Rentals | Invoice | Invoice and Print

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Invoice**

RENTAL CONTRACT

Rental Contract · RC00015

Process | Contract | Rental | **Actions** | Navigate | Less options

Ship Rentals | Return Rentals | **Invoice** | Invoice and Print | Post

General

Finalize the document by posting the amounts and

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

Contract Total
Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/10/2018	6/9/2018	
1	EAST			4/10/2018	6/9/2018	

Click on the button **OK**

Contract Total
Outstanding Amount

Invoice Posted Successfully.

OK

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/10/2018	6/9/2018	5,000.00
1	EAST			4/10/2018	6/9/2018	5,000.00

The following demonstrates that the invoice was posted with a Posting Date of May 5.



Click on the navigation menu item popup **Rental**

amics 365 | Business Central | Rental Contract · RC00015

← RENTAL CONTRACT

Rental Contract · RC00015

Process | Contract | **Rental** | Actions | Navigate | Less

Ship Rentals | Return Rentals | Invoice | Invoice and I

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Posted Invoices**

✎ + 🗑

Posted Deliveries | Posted Returns | **Posted Invoices**

View the history of posted sales invoices that have

External Document No.

Rental Terms Code MONTH-PEND

Click on the link in cell **No.** with the value **RI00011**

← ... Rental Contract | Work Date: 5/5/2018 | ← Posted Sales Invoices | Work Date: 5/5/2018

Search | Manage | Invoice | Navigate

No.	Customer No.
RI00011	10000

Open record "RI00011"

Click on the field **Posting Date**

Note that the Posted Invoice has the Posting Date of 5/5/2018.

Therefore all Rental Value Entries, G/L Entries, Tax Entries and Customer entries will have the Posting Date of 5/5/2018.

General

No. RI00011

Customer Adatum Corporation

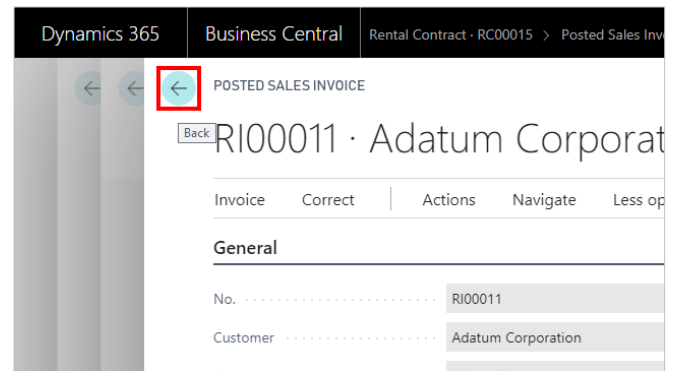
Contact Robert Townes

Posting Date **5/5/2018**

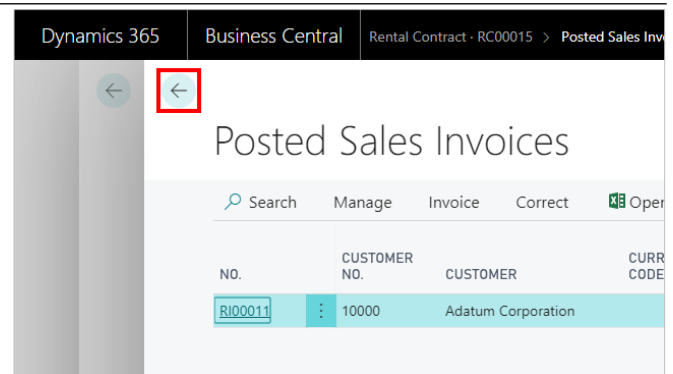
Due Date 6/5/2018 | 5/5/2018

Lines | Manage | More options

Click on the back button



Click on the back button



The second invoice for this contract will be processed from the Rental Invoicing Worksheet.

To learn about processing early billing invoices from the Rental Invoicing Worksheet, see ODT Rentals Online help, Additional Rental Processes, How to Batch Invoice Rental Contracts, How to Batch Invoice Rental Contracts with Early Billing.

3.4.11. How to Process Invoices using Bill Until Date

3.4.11.1. Overview

The Bill Until Date feature 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.

For example, if you have multiple past periods that have not been billed, the Bill Until Date can be set to bill the missed invoicing and set the Posting Date to be within the current accounting period for financial reporting.

Another example is, if you and your customer want to invoice multiple periods in advance, then the Bill Until Date can be set to bill future invoicing based on the Billing Date on the Rental Amount lines, while setting the Posting Date to a desired date that the Ledger Entries will be posted with.

On the rental contract, the Bill Until Date field is located on General tab. The Show more must be selected to populate the date that the contract is to be billed up to.

The Bill Until Date field is also an option on the Proforma Invoice request page.

NOTE:

If your organization is using the Rentals Accrual and Deferrals feature, then it is highly recommended that the Accrual Journal be ran for the end of each accounting period and posted to ensure that revenue related to the future periods are deferred as needed. Thus ensuring each accounting period has the correct rental revenue reported.

Processing Notes:



When Bill Until Date is left blank on the contract, then the Posting Date is used to determine which Rental Amount Lines are to be billed.

When Bill Until Date is populated, then the date specified in the Bill Until Date field is used to determine which Rental Amount Lines are to be billed.

The Bill Until Date field on the contract is cleared once the invoice is posted.

3.4.11.2. How to Process a Missed Invoice using Bill Until Date

The following example demonstrates the scenario where a contract was missed being invoiced in the May accounting period, and the financial statements for May have been completed and distributed.

The contract has a Rental Term for periodic invoicing on a monthly basis at the end of each rental period. The rental start date was April 29 and the first invoice should have been posted on May 28, however was not.

Therefore the Posting Date will need to be a date in June, but only the rental period missed being invoiced on May 28 is to be invoiced.

For this example, June 1 will be used as the Posting Date on the contract and the Bill Until Date will be set to May 28.

The Print Proforma Invoice will be ran prior to posting the invoice to demonstrate the use of the Bill Until Date for printing the Proforma Invoice.

Click on the field **Posting Date**

The screenshot shows a web interface for contract management. On the left is a sidebar with a list of contracts. The main area has tabs for 'Process', 'Contract', 'Rental', 'Actions', 'Related', and 'Fewer options'. The 'Contract' tab is active, showing a 'General' section. Fields include 'Sell-to Customer Na...' (Adatum Corporation), 'Quote No.', 'Posting Date' (4/29/2021), 'Order Date' (4/26/2021), 'Document Date' (4/29/2021), and 'External Document No.'. The 'Posting Date' field is highlighted with a red box, and a calendar icon is visible to its right.

Click on the link **Open the date picker for Posting Date**

This screenshot is similar to the previous one but shows the date picker for the 'Posting Date' field. The date '4/29/2021' is highlighted in blue, and a red box surrounds the calendar icon to its right. Additional fields on the right side of the form are visible, including 'Rental Terms Code', 'Deposit Amount', 'Contract Total', 'Outstanding Amount', and an 'Advanced Proforma' toggle switch.



Click on the link **Next**

The screenshot shows a form with various fields. The 'Posting Date' field is set to 4/29/2021. A calendar is open, showing April 2021. The 'Next' button is highlighted in red.

Click on the link **Next**

The screenshot shows the same form as the previous one, but the calendar is now showing May 2021. The 'Next' button is highlighted in red.

Click on a date in the calendar

Select June 1.

The screenshot shows the same form as the previous ones, but the calendar is now showing June 2021. The date June 1 is selected and highlighted in red.

Click on the button **Show more**

The screenshot shows a summary of the rental details. The 'Show more' button is highlighted in red.

Rental Terms Code	Deposit Amount	Contract Total	Outstanding Amount
	0.00	306.00	306.00



Click on the field **Bill Until Date**

The screenshot shows a form with several fields. The 'Bill Until Date' field is highlighted with a red box. The form includes fields for 'Sell-to Contact' (Robert Townes), 'Customer Rental Instr...' (Yes), 'Override Insurance V...' (toggle), 'Quote No.', 'Posting Date' (6/1/2021), and 'Bill Until Date'. Below the form is a table with columns: Rental Lines, Manage, Line, Functions, Related, and Fewer op.

Click on the link **Previous**

The screenshot shows the 'Bill Until Date' field with a calendar dropdown. The calendar is for June 2021, and the 'Previous' link is highlighted with a red box. The form includes fields for 'Customer Rental Instr...' (Yes), 'Override Insurance V...' (toggle), 'Quote No.', 'Posting Date' (6/1/2021), and 'Bill Until Date'. Below the form is a table with columns: Rental Lines, Manage, Line, Functions, Related, and Fewer op.

Click on a date in the calendar

Select May 28, which is the Billing Date for the first rental period that was not invoiced in May.

The screenshot shows the 'Bill Until Date' field with a calendar dropdown. The calendar is for May 2021, and the date May 28 is highlighted with a red box. The form includes fields for 'Quote No.', 'Posting Date' (6/1/2021), 'Bill Until Date', 'Time Zone Difference', 'Job No.', 'Advanced Proforma' (toggle), and 'Fewer options'. Below the form is a table with columns: Rental Lines, Manage, Line, Functions, Related, and Fewer op.

Click on the navigation menu item popup **Process**

The screenshot shows a navigation menu with the 'Process' button highlighted with a red box. The menu includes options for 'New', 'Manage', 'Process', and 'Contract'. The 'Process' button is located in the 'Rental Contract' section. The form includes fields for 'Sell-to Customer No.', 'Sell-to', and 'Sell-to Address'.



Click on the navigation menu item **Print Proforma Invoice...**

The screenshot shows the 'Rental Contract · RC0001' page. On the left, there is a table with columns 'Sell-to Customer No.' and 'Sell-to Address'. The table contains four rows, each with '10000' and 'Add'. On the right, there is a 'Process' tab with a dropdown menu open. The menu options are 'Print...', 'Send...', 'Print Pick List...', 'Email...', 'Print Proforma Invoice...' (highlighted with a red box), and 'Copy Document'. Below the menu, there are fields for 'Sell-to Address' (192 Market Square) and 'Sell-to Address 2'.

Print Proforma Invoice Processing Notes:

The Posting Date on the contract will populate the Cut-Off Date and can be overridden.

If the Bill Until Date is not populated, then the Cut-off Date will be used to determine which Rental Amount Lines are to be billed.

If the Bill Until Date field is entered on the contract, then the date will default to the Bill Until Date field on the Print Proforma page, and will be used to determine which Rental Amount Lines are to be billed rather than the Cut-off Date. The Bill Until Date can be overridden if defaulted from the contract.

Click on the field **Cut-off Date**

Note that the Posting Date and Bill Until Date entered on the contract has defaulted to the Print Proforma Invoice request page.

The screenshot shows the 'Print Proforma Invoice' page. On the left, there is a table with columns 'Customer No.', 'Address', 'City', 'State', 'ZIP Code', 'Map', 'Contact No.', and 'Contact'. The table contains four rows, each with '10000' and 'Add'. On the right, there are fields for 'Number of Copies', 'Print Company Address', 'Show Alternate Prices', 'Show Rental Details', 'Hide Periodic/Standby Usage D...', 'Cut-off Date' (6/1/2021, highlighted with a red box), and 'Bill Until Date' (5/28/2021). Below these fields, there is a 'Filter: Rental Contract' section.

Click on **Send to... Print Preview & Close Cancel**

Select the preferred method for reviewing the Proforma Invoice.

The screenshot shows the 'Print Proforma Invoice' page. On the left, there is a table with columns 'Quote No.', 'Posting Date', 'Bill Until Date', 'Rental Lines', 'Rental Unit No.', and 'Rental Unit'. The table contains four rows, each with '10000' and 'Add'. On the right, there are fields for 'Sell-to Customer No.', 'Ship-to Code', and a '+ Filter...' button. Below these fields, there is a 'Filter: Rental Additional Note' section. At the bottom, there are three buttons: 'Send to...' (highlighted with a red box), 'Print', and 'Preview & Close'.

Note in the Proforma Invoice picture below that the Rental Proforma Date on the upper right has the Cut-off Date.

Note that the Rental Charges are for April 29 to May 28 as per the date entered in the Bill Until Date field.



Proforma Invoice Example

Rental Proforma					
Sell To: Adatum Corporation Robert Townes 192 Market Square GA 31772			Ship To: Adatum Corporation Robert Townes 192 Market Square GA 31772		
			P.O. Number: 10000 Customer ID: Jim Olive SalesPerson: Ship Via: Ship Method: Terms: 1 Month/2% 8 days		
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00008	18 G Brad Nailers Group		1		
RU00008-003	18 G Brad Nailer	188N-003	1		150.00
Rental	Apr 29, 2021 to May 28, 2021		1 @ 150.00/ Monthly Rental = 150.00		
Amount Subject to Sales Tax USD 150.00				Subtotal:	150.00
Amount Exempt from Sales Tax USD 0.00				Total Sales Tax:	3.00
				Total USD:	153.00

The following steps for invoicing the contract are the same as when not using the Bill Until Date, since the steps for setting the Bill Until Date on the contract have already been covered.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 6/1/2021

Rental Contract · RC00018

ProcessContract**Rental**ActionsRelatedFewer options

General

Sell-to Customer Name

Adatum Corporation

Quote No.

Posting Date

6/1/2021

Click on the navigation menu item **Invoice**

Rental Contract | Work Date: 6/1/2021

Rental Contract · RC00018

ProcessContract**Rental**ActionsRelatedFewer options

Ship Rentals

Return Rentals

Bulk Returns

Invoice and Print

Ship and Send...

Return and Send...

Invoice

Invoice and Send...

Finalize the document by posting the amount

Quote No.

Posting Date

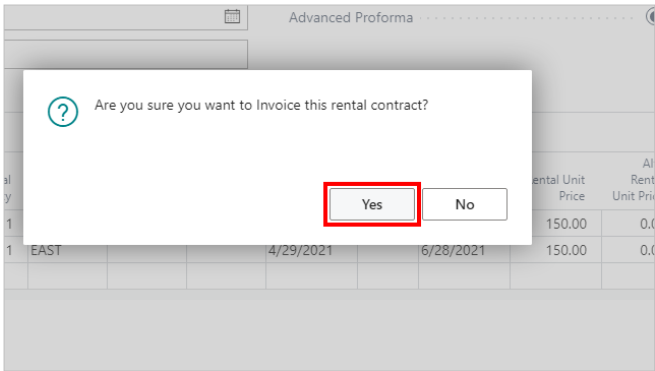
6/1/2021

Order Date

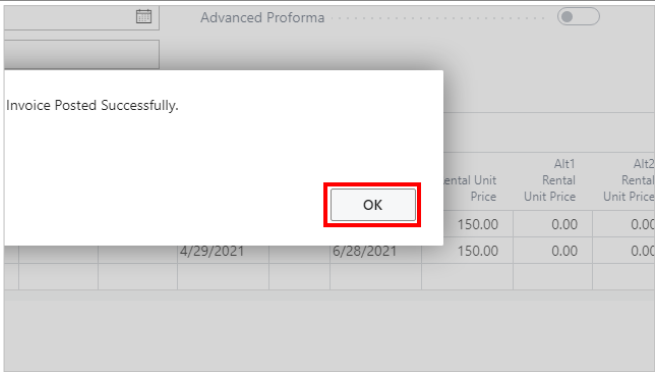
4/26/2021



Click on the button **Yes**

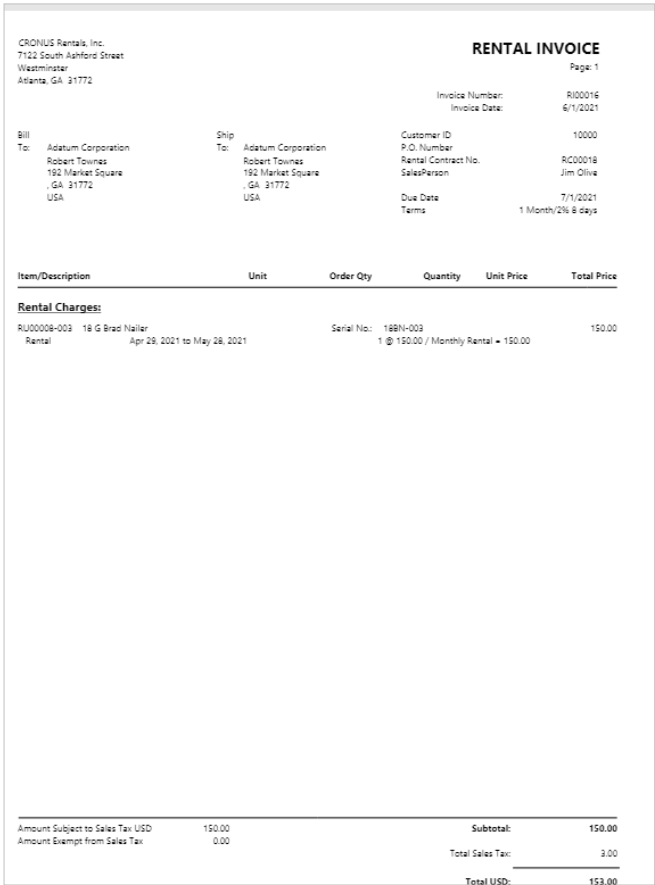


Click on the button **OK**



Note in the following picture of the Posted Rental Invoice that the Invoice Date is June 1, and like the Proforma Invoice, the Rental Charges are from April 29 to May 28.

Posted Rental Invoice using Bill Until Date



3.4.11.3. How to Process an Invoice for Future Rental Periods with Bill



Until Date

The following example demonstrates the scenario where the customer is being billed at a daily rental rate in advance.

The invoices are processed for multiple days in advance which is easily done using the Bill Until Date field.

In this example, the Rental Units were shipped on April 20, and now the customer is to be billed for 10 days in advance with the posting to occur on April 20. Therefore the Posting Date will be April 20 and the Bill Until Date will be set to April 29.

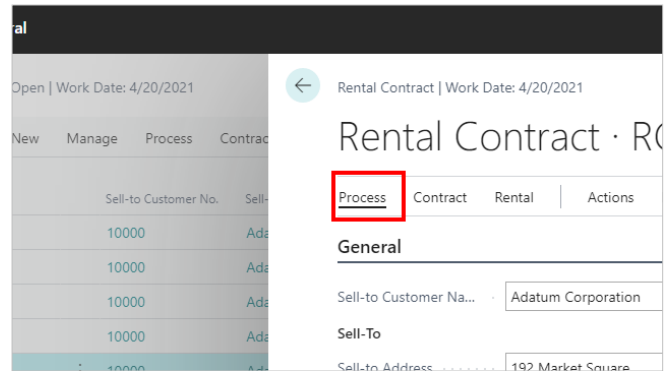
Click on the button **Show more**

Click on the field **Bill Until Date**

Click on the link **Open the date picker for Bill Until Date**

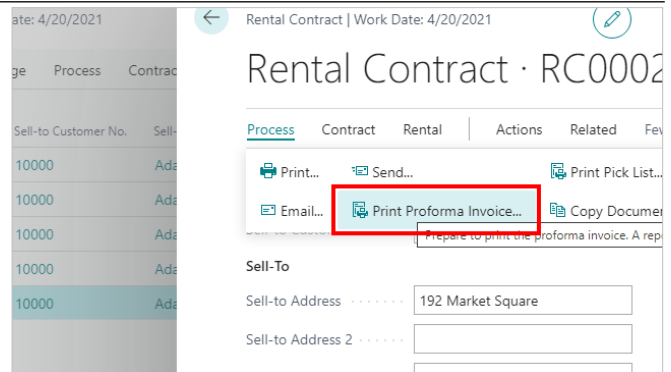
Click on a date in the calendar

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract' screen for 'RC0002'. The 'Process' button is highlighted in a red box. The 'General' tab is active, showing 'Sell-to Customer No.' as '10000' and 'Sell-to Address' as '192 Market Square'.

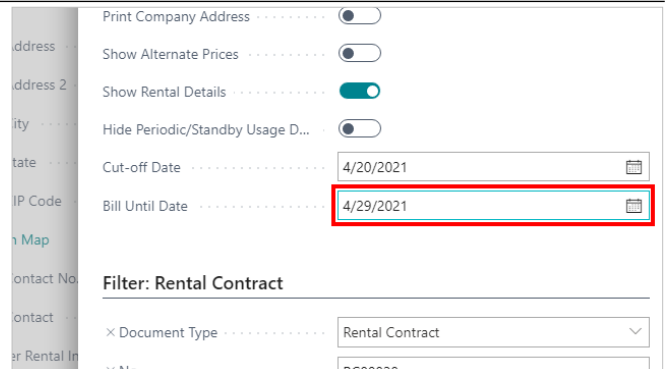
Click on the navigation menu item **Print Proforma Invoice...**



The screenshot shows the 'Rental Contract' screen for 'RC0002'. The 'Print Proforma Invoice...' button is highlighted in a red box. The 'Process' tab is active, showing 'Sell-to Customer No.' as '10000' and 'Sell-to Address' as '192 Market Square'.

Click on the field **Bill Until Date**

Note that the Posting Date and Bill Until Date entered on the contract has defaulted to the Print Proforma Invoice request page.



The screenshot shows the 'Rental Contract' screen for 'RC0002'. The 'Bill Until Date' field is highlighted in a red box, showing the date '4/29/2021'. The 'Process' tab is active, showing 'Sell-to Customer No.' as '10000' and 'Sell-to Address' as '192 Market Square'.

Note in the following picture of the Proforma Invoice that:

- The Rental Proforma Date is April 20.
- In the Rental Charges the customer will be billed at the daily rate for 10 days from April 20, up to and including April 29.



ODT Rentals Online Help

Proforma Invoice Example with Bill Until Date Future Billing

CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Proforma
Page: 1
Rental Contract Number: RC00020
Rental Proforma Date: 4/20/2021

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number: 10000
Customer ID: Jim Olive
SalesPerson: Jim Olive

Ship Via:
Ship Method:
Terms: 1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00020	Portable Generators		3		
RU00020-001	Portable Generators		1		
Rental	Apr 20, 2021 to Apr 28, 2021		10 @ \$5.00/ Daily Rental =	\$50.00	\$50.00
RU00020-002	Portable Generators		1		
Rental	Apr 20, 2021 to Apr 28, 2021		10 @ \$5.00/ Daily Rental =	\$50.00	\$50.00
RU00020-003	Portable Generators		1		
Rental	Apr 20, 2021 to Apr 28, 2021		10 @ \$5.00/ Daily Rental =	\$50.00	\$50.00

Amount Subject to Sales Tax USD: 750.00
Amount Exempt from Sales Tax USD: 0.00

Subtotal: 750.00
Total Sales Tax: 15.00
Total USD: 765.00

The following invoicing of the contract uses the normal invoicing steps, since the Posting Date and Bill Until Date have already been selected.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/20/2021

Rental Contract · RC00020

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/20/2021

Click on the navigation menu item **Invoice**

Select the preferred method on invoicing, whether Invoice, Invoice and Print or Invoice and Send.

Rental Contract | Work Date: 4/20/2021

Rental Contract · RC00020

Process Contract **Rental** Actions Related Fewer options

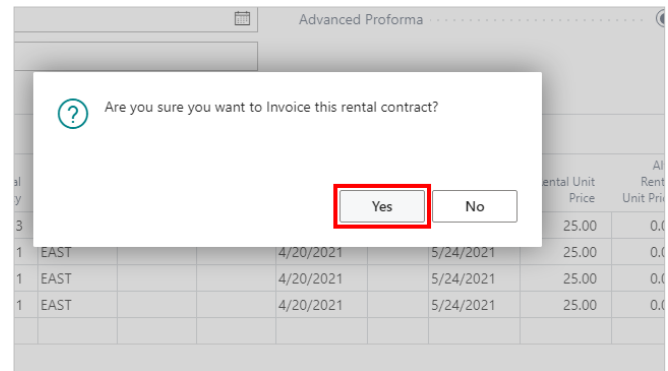
Ship Rentals Return Rentals Bulk Returns Invoice and Print
Ship and Send... Return and Send... **Invoice** Invoice and Send...

Quote No.

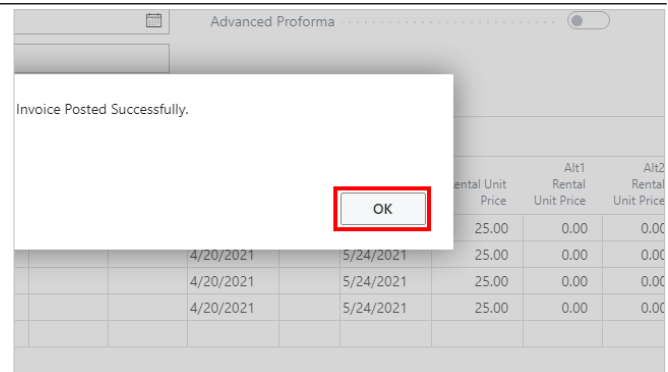
Posting Date 4/20/2021

Order Date 4/20/2021

Click on the button **Yes**



Click on the button **OK**



The Posted Rental Invoice can be reviewed by selecting Rental, Posted Invoices, Actions, then Print Rental. The invoice will display the Rental Charges the same as the Proforma Invoice.

3.4.12. How to Process a Foreign Currency Contract

3.4.12.1. Overview

ODT Rentals provides the ability to process Rental Quotes and Rental Contracts, for customers having a Currency Code setup that is different than the local currency.

For foreign currency customers the setups to process rental transactions include:

- A Customer Posting Group for foreign customers
 - A Gen. Business Posting Group for foreign customers
 - General Posting Setup records for the Gen, Business Posting Group created
 - Rental Price cards in which the foreign currency code is selected.
- This is not mandatory as the Rental Unit Price will be automatically converted to the Customer currency, from the local currency price card, when setup. If price cards are not setup on the unit groups and/or units, then the price in the customer currency can be entered on the rental line.
- Setup of a Currency Code, other than the local currency, on a foreign Customer card.

To learn about setting up the Customer Currency Code, Customer Posting Group, Gen. Business Posting Group and General Posting Setup records, please review the Dynamics 365 Business Central help.

To learn about setting up a Rental Price on a Rental Unit for foreign currency, see the ODT Rentals Online help, Setup Rentals, Setup Rental Units, How to Add Rental Prices to a Rental Units.

3.4.12.2. How to Process a Foreign Currency Contract

Profile – Sales Order Processor

For users having the Business Manager Profile the same steps apply.

In this example, the required setups have been



completed.

In addition, Rental Price cards for a Rental Unit group have been configured for the MONTH-END rental term for both local price and CAD currency.

Both the Customer and Rental Price card have the Currency Code of CAD assigned.

NOTE:
The example that will be demonstrated is from a USA company. The same steps apply to a CA company.
The following demonstrates the entry of the Rental Lines.

Click on the navigation menu item **Rental Contract**

Click on the field **Sell-to Customer Name**

Click on **No. = C00010, Name = ODT Rentals Ltd., City = Calgary**



ODT Rentals Online Help

Click on the button **Yes**

The Invoice Details tab, Currency Code field will be populated with the Currency Code setup on the Customer card.

The Currency Code field cannot be edited.

Click on the field **CAD**

Click on the cell **Rental Unit No.**

Click on the lookup button in the cell **Rental Unit No.**
lookup button



Click on the link in cell **No.** with the value **RU00001**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Terms Code**

Rental Lines		Manage	More options	
New Line		Delete Line	Expand All Collapse All Group Avail Matrix	
RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
RU00001	Buckeye Ditcher Group	MONTH-END	2	EAST

Click on the lookup button in the cell **Rental Terms Code lookup button**

<div><div>Manage</div><div>More options</div></div>					
<div><div>Delete Line</div><div>Expand All</div><div>Collapse All</div><div>Group Avail Matrix</div></div>					
DESCRIPTION		RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
<div><div></div><div></div><div></div></div>	Buckeye Ditcher Group	MONTH-P	2	EAST	
</					

Click on **Code = MONTH-END, Description = Monthly Rental for Billing at End of Contract**

TAL NO.	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTA TERMS CODE A
001	Buckeye Ditcher Group	MONTH-END	2	EAST	

CODE	DESCRIPTION
MONTH-END	Monthly Rental for Billing at End of Contract
MONTH-END-PROR...	Monthly Rental for Billing at End of Contract - Prorated
MONTH-END-PROR...	Monthly Rental for Billing at End of Contract - Prorated
MONTH-END-PROR...	Monthly Rental for Billing at End of Contract - Prorated
MONTH-END-PROR...	Monthly Rental for Billing at End of Contract - Prorated



Click on the cell **Rental Quantity**

More options						
Expand All Collapse All Group Avail Matrix						
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	
	Buckeye Ditcher Group	MONTH-PEND	0			
More options						
UNIT OF						

Enter the text **2**.

More options						
Expand All Collapse All Group Avail Matrix						
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	
	Buckeye Ditcher Group	MONTH-PEND	2			
More options						
UNIT OF						

Click on the cell **Location Code**

s						
All Collapse All Group Avail Matrix						
ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
	itcher Group	MONTH-PEND	2			4/
More options						
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

Collapse All Group Avail Matrix						
RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	
Group	MONTH-PEND	2			4/9/2018	
More options						
UNIT OF						
CODE NAME						
EAST East Warehouse						
Select record "EAST"						
WEST West Warehouse						
+ New						
LOCATION CODE	QUANTITY	CODE	EXCL. TAX	CODE	EX	
	0		0.00	*		



Click on the cell **Rental Unit Price**

The price in the foreign currency amount defaults from the Rental Price card that has a Currency Code matching the Currency Code on the Rental Line.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
	4/9/2018	5/8/2018	6,250.00	0.00	0.00

Click on the cell **Currency Code** with the value **CAD**

The Currency Code on the Invoice Details tab, automatically populates the Currency Code on the Rental Line. The Rental Unit Price is then defaulted from the applicable Rental Price card setup on the unit.

RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	CURRENCY CODE	QTY.
0.00	0.00	0.00	CAD	

The Currency Code field can be moved to be before the Rental Unit Price field on the Rental Lines using the Dynamics 365 Business Central, Personalize feature.

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-END
	Buckeye Ditcher Group	MONTH-END
	Buckeye Ditcher Group	MONTH-END

Click on the lookup button in the cell **Rental Unit No.** **lookup button**

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-END
	Buckeye Ditcher Group	MONTH-END
	Buckeye Ditcher Group	MONTH-END

Click on the link in cell **No.** with the value **RU00002**

Edit View		
RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

New Line Delete Line Expand All Collaps		
RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-END
RU00002	Buckeye Ditcher	MONTH-END
	Buckeye Ditcher Group	MONTH-END

Sales Lines Manage More options

Click on the lookup button in the cell **Rental Unit No.** lookup button

New Line Delete Line Expand All Collaps		
RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-END
RU00002	Buckeye Ditcher	MONTH-END
	Buckeye Ditcher Group	MONTH-END

Look up value

Sales Lines Manage More options

Click on the link in cell **No.** with the value **RU00003**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

The following picture displays the Rental Amount Lines for the first child unit selected.

Note that the Currency Code is displayed on the Rental Amount line and the amounts are in the foreign currency.

Rental Amount Lines can be reviewed by selecting the More Options, Lines, Rental Amount Lines on the Rental Lines command bar.

VIEW - RENTAL LINE RENTAL AMOUNTS								
TYPE	STARTING DATE-TIME	ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	CURRENCY CODE	AMOUNT INCLUDING TAX	TAX GR CODE
Rental	4/9/2018 12:00 AM	5/8/2018 11:59 PM	1	6,250.00	6,250.00	CAD	6,250.00	SUPPL

Close



The following picture displays the Rental Contract to show that the foreign currency prices are printed on rental documents.

The Total Price caption in the footer of the document prints the Currency Code related to the currency of the Customer and prices in the documents.

The Rental Quote, Rental Contract, Proforma Invoice and Posted Invoice, will all print the prices in the foreign currency amount.

Rental Contract

Page: 1
RC00019
4/9/2018

Rental Contract Number:
Rental Contract Date:

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Sell To: ODT Rentals Ltd.
111 First Street
Calgary, CANADA A1A 1A1

Ship To: ODT Rentals Ltd.
111 First Street
Calgary, CANADA A1A 1A1

P.O. Number
Customer ID
SalesPerson
C00010

Ship Via
Terms

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00001	Buckeye Ditcher Group		2		
RU00002	Buckeye Ditcher	BD-002	1		
Rental	Apr 08 2018 to May 08 2018		1 @ 6,250.00/Month = 6,250.00		6,250.00
	Rental Returns Rental equipment must be cleaned prior to return Equipment using diesel or gas are to be filled up If fuel is not topped up an additional charge will be levied to cover topping up the fuel Thank you for your business				
RU00003	Buckeye Ditcher	BD-003	1		
Rental	Apr 08 2018 to May 08 2018		1 @ 6,250.00/Month = 6,250.00		6,250.00
	Rental Returns Rental equipment must be cleaned prior to return Equipment using diesel or gas are to be filled up If fuel is not topped up an additional charge will be levied to cover topping up the fuel Thank you for your business				
Amount Subject to Sales Tax CAD				0.00	
Amount Exempt from Sales Tax CAD				12,500.00	
Subtotal:					12,500.00
Tax:				0.00	
Total CAD:					12,500.00

The following steps demonstrate the shipping and invoicing of the contract.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central Rental Contract · RC00019

RENTAL CONTRACT

Rental Contract · RC00019

Process Contract **Rental** Actions Navigate

Print... Print Proforma

General

Sell-to Customer Name ODT Rentals Ltd.

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central Rental Contract · RC00019

RENTAL CONTRACT

Rental Contract · RC00019

Process Contract Rental Actions Navigate

Ship Rentals Return Rentals Invoice Invo

Post the shipment of the rental units on the rental lines. A posted delive

General

Sell-to Customer Name ODT Rentals Ltd.

Quote No.



ODT Rentals Online Help

Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
EAST			4/9/2018	5/8/2018	6,250.00	
EAST			4/9/2018	5/8/2018	6,250.00	

Click on the button **OK**

ment Posted Successfully.

OK

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
		4/9/2018	5/8/2018	6,250.00	0.00
		4/9/2018	5/8/2018	6,250.00	0.00

Click on the field **Posting Date**

Return Rentals Invoice Invoice and Print Posted Deliveries Post

ODT Rentals Ltd.

4/9/2018

4/9/2018

4/9/2018

Type the date in the format MM/dd/yyyy

Manage Line Functions Less options

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

ODT Rentals Ltd.

4/9/2018

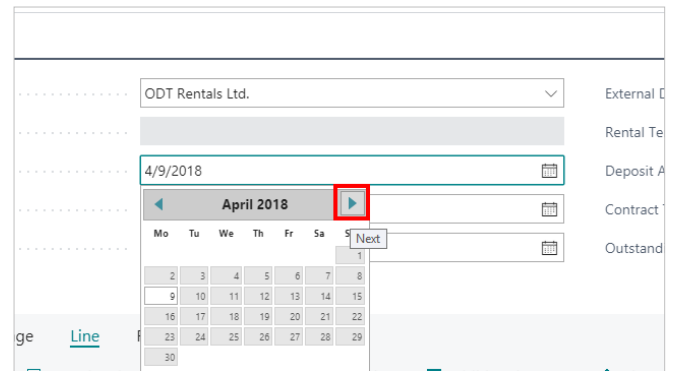
4/9/2018

4/9/2018

Type the date in the format MM/dd/yyyy

Manage Line Functions Less options

Click on the link **Next**



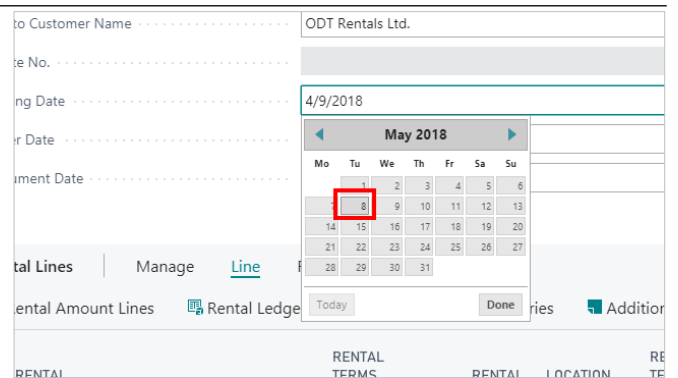
ODT Rentals Ltd.

4/9/2018

April 2018

Next

Click on a date in the calendar



ODT Rentals Ltd.

4/9/2018

May 2018

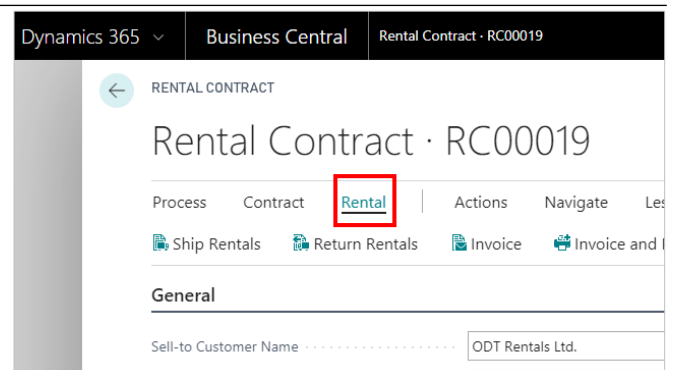
8

Today Done

Select the date which corresponds to the when the invoicing is for.

The date must be equal to, or later than the Billing Date in the Rental Amount Lines.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central Rental Contract - RC00019

RENTAL CONTRACT

Rental Contract · RC00019

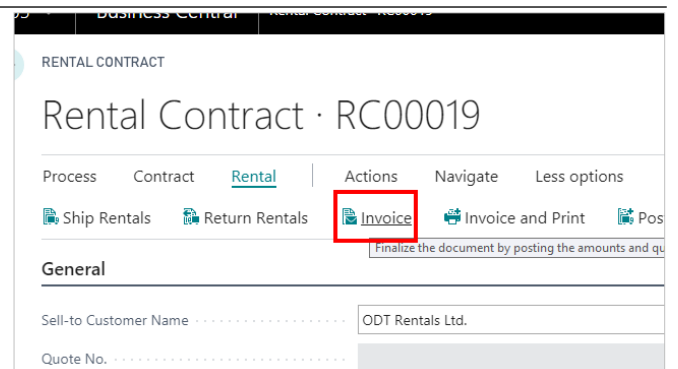
Process Contract **Rental** Actions Navigate

Ship Rentals Return Rentals Invoice Invoice and Print

General

Sell-to Customer Name ODT Rentals Ltd.

Click on the navigation menu item **Invoice**



Dynamics 365 Business Central Rental Contract - RC00019

RENTAL CONTRACT

Rental Contract · RC00019

Process Contract Rental Actions Navigate Less options

Ship Rentals Return Rentals **Invoice** Invoice and Print Post

General

Sell-to Customer Name ODT Rentals Ltd.

Quote No.



ODT Rentals Online Help

Click on the button **Yes**

Contract Total
Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 UNIT PRICE
EAST			4/9/2018	5/8/2018	6,250.00	
EAST			4/9/2018	5/8/2018	6,250.00	

Click on the button **OK**

Contract Total
Outstanding Amount

Invoice Posted Successfully.

OK

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
		4/9/2018	5/8/2018	6,250.00	0.00
		4/9/2018	5/8/2018	6,250.00	0.00

The following provides a review of the posted entries generated when posting the invoice.

Click on the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Less

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE
RU00001	Buckeye Ditcher Group	MONTH-END
RU00002	Buckeye Ditcher	MONTH-END
RU00003	Buckeye Ditcher	MONTH-END

Sales Lines | Manage | More options

Click on the navigation menu item popup **Line**

Quote No.
Posting Date 5/8/2018
Order Date 4/9/2018
Document Date 5/8/2018

Rental Lines | Manage | **Line** | Functions | Less options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	RENTAL UNIT PRICE
RU00001	Buckeye Ditcher Group	MONTH-END	2	6,250.00



ODT Rentals Online Help

Click on the navigation menu item **Rental Value Entries**

Navigation menu items: Manage, Line, Functions, Less options. Sub-menu items: Rental Ledger Entries, **Rental Value Entries**, Additional Notes.

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT
1 Buckeye Ditcher Group	MONTH-END	2	EAST	
2 Buckeye Ditcher	MONTH-END	1	EAST	

Click on the cell **Unit Price** with the value **6,250.00**

Note that Unit Price in the Rental Amount line contains the amount in the foreign currency.

CR. MEMO NO.	CR. MEMO LINE NO.	QUANTITY	UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX
	0	1	6,250.00	6,250.00	6,250.00

Click on the cell **Currency Code** with the value **CAD**

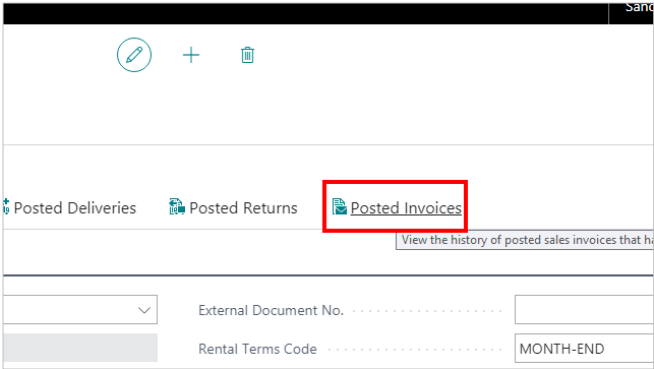
UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX	CURRENCY CODE	ENTRY NO.
6,250.00	6,250.00	6,250.00	CAD	48

Click on the button **Close**

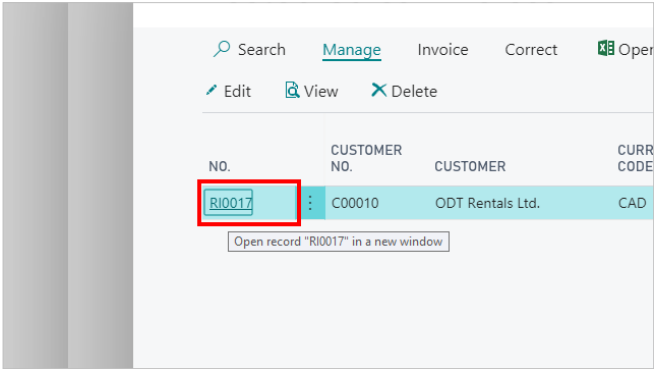
Close



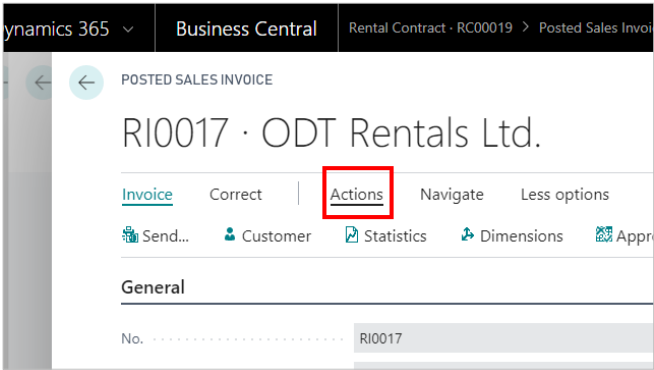
Click on the navigation menu item **Posted Invoices**



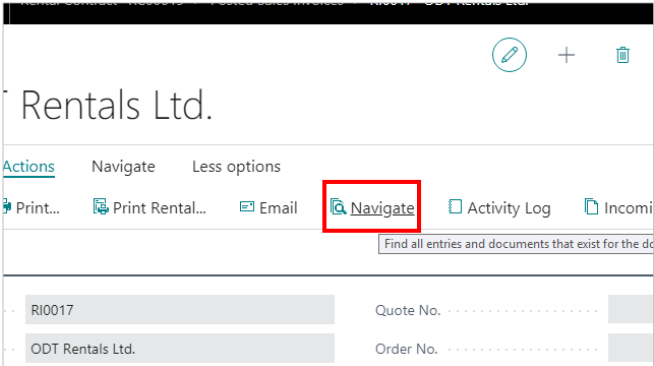
Click on the link in cell **No.** with the value **RI0017**



Click on the navigation menu item popup **Actions**



Click on the navigation menu item **Navigate**



Click on the cell **Related Entries** with the value **Cust. Ledger Entry**

v Related Entries Find Print...

RELATED ENTRIES
Posted Sales Invoice
G/L Entry
Cust. Ledger Entry
Detailed Cust. Ledg. Entry

Click on the navigation menu item **Show Related Entries**

Selected - Cust. Ledger Entry

DOCUMENT
Document No. RI0017

Process Find By Actions Less options

Show Related Entries Find Print...

View the related entries of the type that you have chosen.

RELATED ENTRIES
Posted Sales Invoice
G/L Entry

Click on the link in cell **Amount** with the value **12,500.00**

Note that the Amount column contains the total amount of the invoice in the foreign currency, CAD.

options

N	CURRENCY CODE	ORIGINAL AMOUNT	AMOUNT	AMOUNT (\$)	REMAIN AMT
17	CAD	12,500.00	12,500.00	8,320.05	12,500.00

Open record "12,500.00" in a new window

Click on the link in cell **Amount (\$)** with the value **8,320.05**

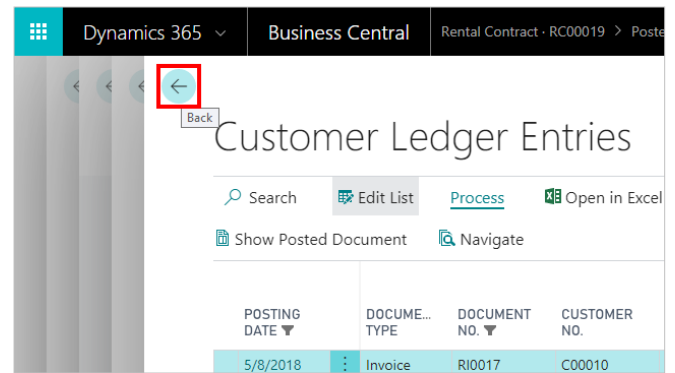
Note that the field contains the local currency of the company.
In this example, USD.

CURRENCY CODE	ORIGINAL AMOUNT	AMOUNT	AMOUNT (\$)	REMAINING AMOUNT	REMAIN AMT
D	12,500.00	12,500.00	8,320.05	12,500.00	8,320.05

Open record "8,320.05" in a new window

The G/L Entries, Tax Entries and Detailed Cust. Ledg. Entry can be reviewed as well.

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00019 > Posted

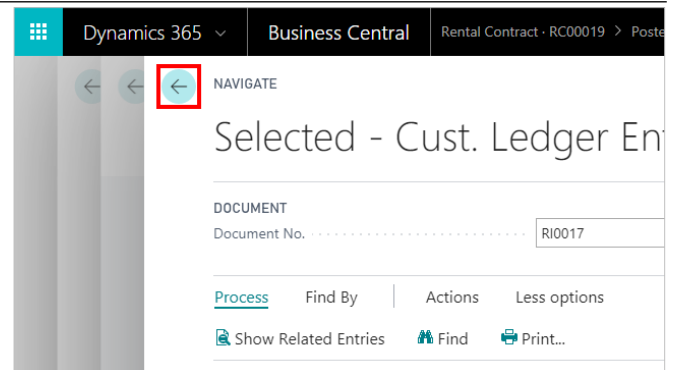
Customer Ledger Entries

Search Edit List Process Open in Excel

Show Posted Document Navigate

POSTING DATE ▼	DOCUME... TYPE	DOCUMENT NO. ▼	CUSTOMER NO.
5/8/2018	Invoice	RI0017	C00010

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00019 > Posted

NAVIGATE

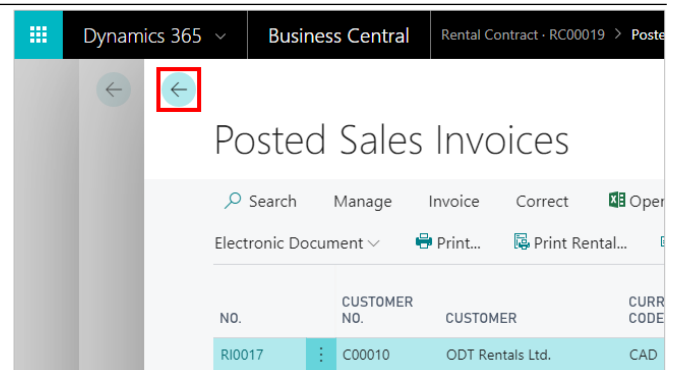
Selected - Cust. Ledger Entry

DOCUMENT
Document No. RI0017

Process Find By Actions Less options

Show Related Entries Find Print...

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00019 > Posted

Posted Sales Invoices

Search Manage Invoice Correct Open

Electronic Document Print... Print Rental...

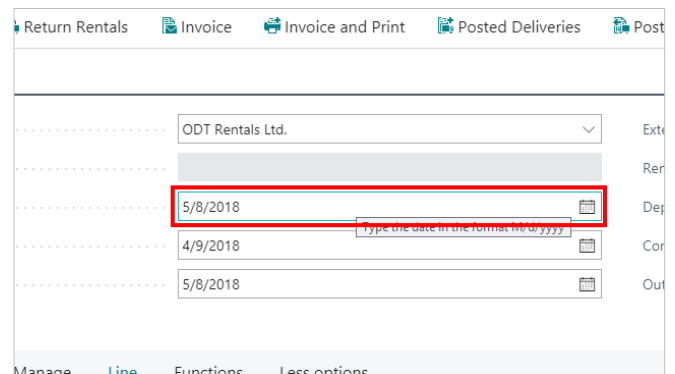
NO.	CUSTOMER NO.	CUSTOMER	CURR CODE
RI0017	C00010	ODT Rentals Ltd.	CAD

The following demonstrates the returning of the units on the contract, to complete the processing of the contract.

Click on the field **Posting Date**

Ensure the Posting Date is the date the units are/have been returned on.

If not, then lookup and select the applicable date.



Return Rentals Invoice Invoice and Print Posted Deliveries Post

ODT Rentals Ltd.

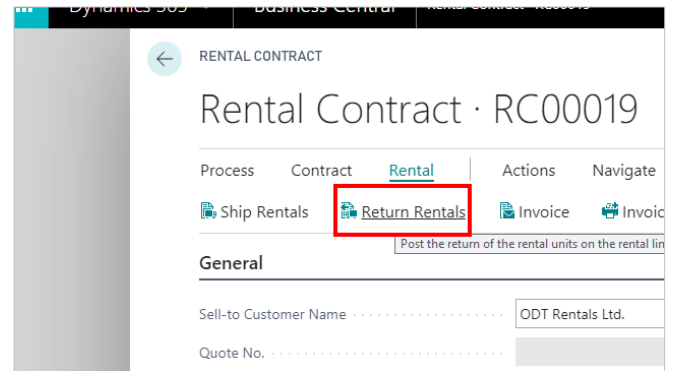
5/8/2018

4/9/2018

5/8/2018

Type the date in the format MM/DD/YYYY

Click on the navigation menu item **Return Rentals**



RENTAL CONTRACT

Rental Contract · RC00019

Process Contract **Rental** Actions Navigate

Ship Rentals **Return Rentals** Invoice Invoice

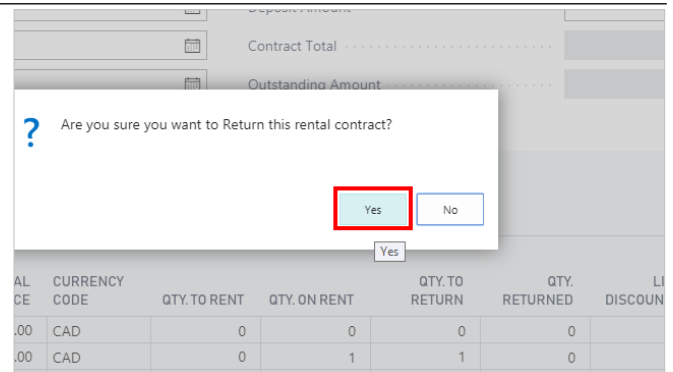
Post the return of the rental units on the rental line

General

Sell-to Customer Name ODT Rentals Ltd.

Quote No.

Click on the button **Yes**



Are you sure you want to Return this rental contract?

Yes No

Yes

AL	CURRENCY	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LI
CE	CODE					
.00	CAD	0	0	0	0	
.00	CAD	0	1	1	0	

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.4.13. How to Sell a Fixed Asset on a Rental Contract

3.4.13.1. Overview

Fixed Assets can be entered on the Sales Lines on the Rental Quote and Rental Contract, and sold from the contract.

The entry on the Sales Lines is the same as the entry on the sales documents.

There are some restrictions to selling a Fixed Asset that is linked to a Rental Unit.

If the Rental Unit is on a Rental Line on a Rental Quote or Rental Contract, but has not been shipped, then a confirmation message will occur.

Example of the message:

RU00006 is linked to a rental unit that is currently on rental lines (RC00013). Are you sure you want to sell this Fixed Asset? Yes/No.

- If select No, then the asset will not be entered on the Sales Line.
- If select Yes, then a message will occur. Example of the message is: RU00006 was linked to an active rental unit RU00006, and this rental unit has now been deactivated. Ok must be selected. The Rental Unit must be deleted from the quote or contract rental lines as it cannot be rented out.

If the Rental Unit is out on rent, then an error will occur, and the Fixed Asset cannot be entered on the Sales Lines.

Example of the error:

FA00001 is linked to a rental unit that is on rent on rental contract RC00009. Return this rental before selling the Fixed Asset.

If the Rental Unit that the Fixed Asset is linked to is not on a on a rental line, then the following confirmation message will occur.

Fixed Asset RU00006 is linked to an active rental unit RU00006. Do you want to deactivate this rental unit now? Yes/No.

- If No is selected, then the Inactive field on the unit will not be enabled.
- If Yes is selected, then the Inactive field on the unit will be enabled. This is the recommended response to the confirmation message.

In order to enter and sell a Fixed Asset, the following fields are available to add to the Sales Lines using Personalize.

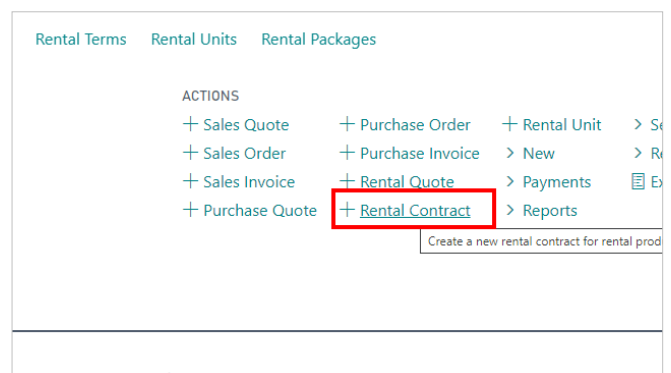
- FA Posting Date
- Depr. Until FA Posting Date
- Depreciation Book Code
- Use Duplication List
- Duplicate in Depreciation Book

3.4.13.2. How to Sell a Fixed Asset on a Rental Contract

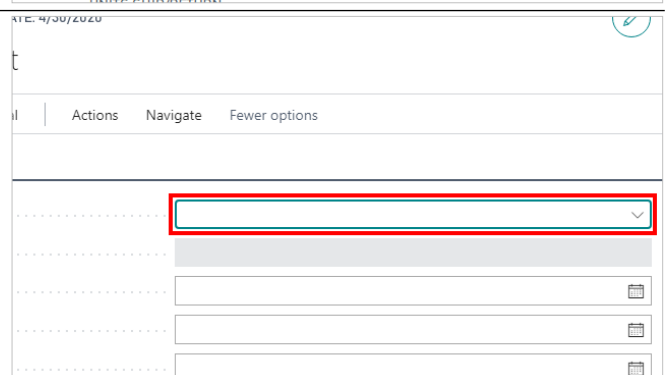
The following example demonstrates the entry and selling of a Fixed Asset on a Rental Contract. For this example, in order to demonstrate the confirmation message, the Fixed Asset is linked to a Rental Unit, which in on a Rental Contract, however has not been shipped.

The fields related to selling a Fixed Asset have been added to the contract Sales Lines.

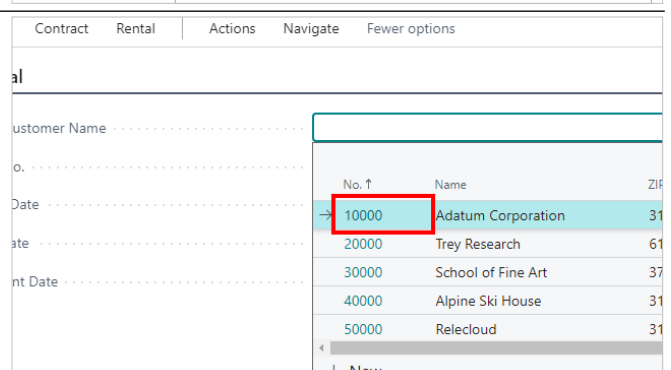
Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**



Click on the link in cell **No.** with the value **10000**



No. ↑	Name	ZIF
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		



Click on the cell **Type** with the value **G/L Account Item Resource Fixed Asset Charge (Item)**

Sales Lines				Manage	Line	Fewer options
Type	No.	Description	Location Code			
→						
Shipping						

Click on the item **Fixed Asset** in the list

Sales Lines				Manage	Line	Fewer options
Type	No.	Description	Location Code			
→						
Shipping						

Click on the cell **No.**

Sales Lines				Manage	Line	Fewer options
Type	No.	Description	Location Code			
→	Fixed Asse					
Shipping						

Click on the link in cell **No.** with the value **RU00006**

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→			
No. ↑			
FA000140 Buckeye Ditcher-006			
RU00006 Buckeye Ditcher			
RU00006 Select record "RU00006" Buck			
RU000024-001 Wacker 50Z3 Excavator			
RU000024-002 Wacker 50Z3 Excavator			
+ New			
Sales Lines			
Type			
→ Fixed Asset			



ODT Rentals Online Help

Click on the button **Yes**

Outstanding Amount

?

RU00006 is linked to a rental unit that is currently on rental lines (RC00003). Are you sure you want to sell this Fixed Asset

Yes No

Click on the button **OK**

As the Rental Unit can not be shipped on the contract it is on, ensure that the unit is changed on the rental line or delete the rental line from the contract.

Outstanding Amount

Fixed Asset RU00006 was linked to an active rental unit RU00006 and this rental unit has now been deactivated.

OK

Click on the cell **Quantity** with the value **0**

Description	Location Code	Quantity	FA Posting Date	Depreciation Book Code	Depr. until FA Posting Date
Buckeye Ditcher		0		COMPANY	<input type="checkbox"/>

Enter the text **1**.

Description	Location Code	Quantity	FA Posting Date	Depreciation Book Code	Depr. until FA Posting Date
Buckeye Ditcher		1		COMPANY	<input type="checkbox"/>



Click on the cell **Depreciation Book Code** with the value **COMPANY**

Note that the Depreciation Book assigned to the Fixed Asset is automatically populated as the book is the default book specified on Fixed Asset Setup.

Location Code	Quantity	FA Posting Date	Depreciation Book Code	Depr. until FA Posting Date	Use Duplication List	Duplicate in Depreciation Book
	1		COMPANY	<input type="checkbox"/>	<input type="checkbox"/>	
				Look up value		

NOTE:

The other asset related fields can be used as they would be on a sales document, if required.

Click on the cell **Unit Price Excl. Tax** with the value **0.00**

Depr. until Posting Date	Use Duplication List	Duplicate in Depreciation Book	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Incl. Tax
<input type="checkbox"/>	<input type="checkbox"/>			0.00	NONTAXA...	0.00	

Enter the text **400000**.

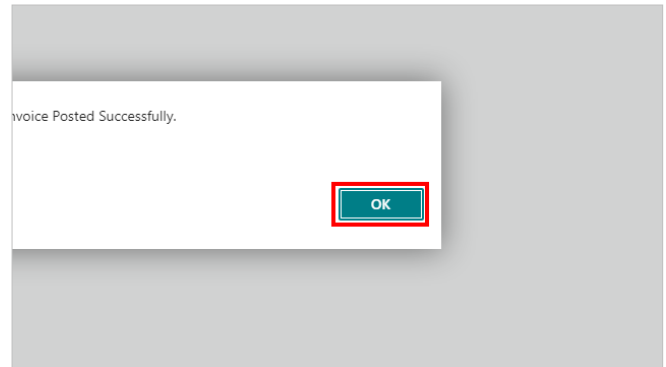
Depr. until Posting Date	Use Duplication List	Duplicate in Depreciation Book	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Incl. Tax
<input type="checkbox"/>	<input type="checkbox"/>			0.00	NONTAXA...	0.00	

Click on the cell **Tax Group Code** with the value **NONTAXABLE**

The Tax Group Code defaults from the Fixed Asset and may need to be changed for the sale.

Use Duplication List	Duplicate in Depreciation Book	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Line
<input type="checkbox"/>			400,000.00	NONTA	400,000.00	400,000.00	

Click on the button **OK**



Remember on the contract that has the Rental Unit the Fixed Asset was linked must be either changed to a different unit or delete the Rental Line.

3.4.14. How to Re-Open Rental Contracts for Additional Processing

3.4.14.1. Overview

The ODT Rental App provides the ability to re-open a Completed Rental Contract using the menu option, Re-open Rental Contract, which is accessed from the Action menu option, on the Completed Rental Contract.

On the re-opened contract the following processes can be performed:

- If the contract that was re-opened had metered usage billing on any of units or rental package, then additional metered usage can be entered and invoiced.
- If the contract that was re-opened had rental units on the rental lines with periodic usage and standby charge pricing, and there were days not billed as either periodic usage or standby charges, then the Periodic Usage Entries can be updated and invoiced.
- A Rental Unit can be added to the contract on the rental lines and be processed using the standard rental processing.
- A Sale Line can be added and invoiced.
- A Corrective Rental Credit Memo can be created for the most recent invoice, which when posted will re-open the Rental Amount Lines related to the invoice, and create a Rental Value Entry or entries for the credits. The Rental Price and Line Discount % fields can be modified, which will update the Rental Amount Lines, and the contract can be re-invoiced.
- If the wrong contract is accidentally re-opened, the contract can be closed by selecting Actions, Process – Close Contract.

NOTE:

The contract cannot be extended to charge for additional rental periods, for the existing Rental Units or Rental Package on the contract.

3.4.14.2. How to Re-Open a Completed Rental Contract

Sales Order Processor Profile

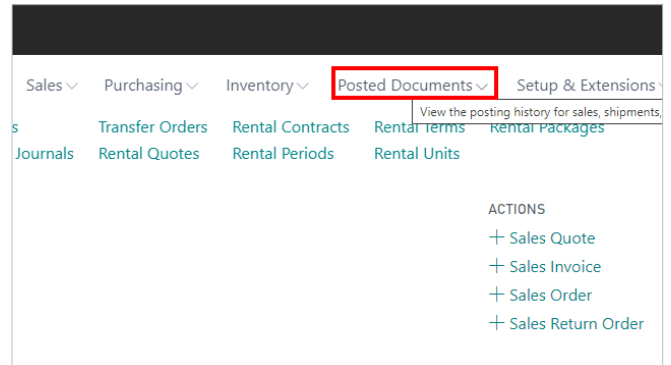
The following example demonstrates how to re-open a Completed Rental Contract, add a Sales Line and post the invoice.



In this example, the contract contains a group with 2 child units. The pricing for the rental term on the lines does not have metered usage or periodic usage.

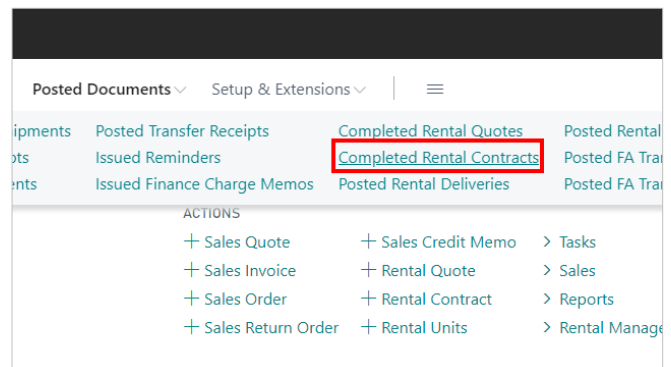
Click on the navigation menu item popup **Posted Documents**

If using the Business Manager Profile, then select the main menu option, Rentals, to access the Completed Rental Contract



Optionally the Search option can be used to open the Completed Rental Contracts list.

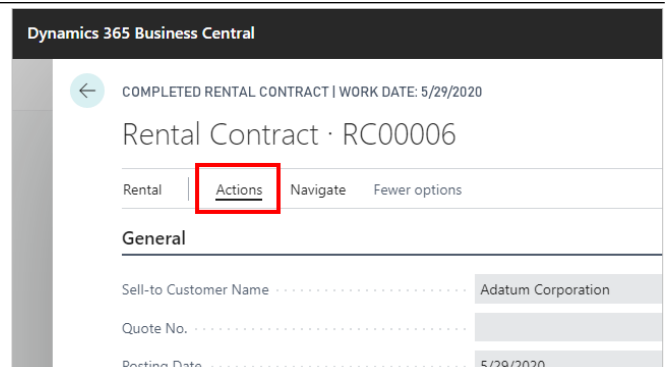
Click on the navigation menu item **Completed Rental Contracts**



Click on the link in cell **No.** with the value **RC00006**

No. ↑		Sell-to Customer No.	Sell-to Customer Name
RC00001	:	10000	Adatum Corporation
RC00002	:	10000	Adatum Corporation
RC00004	:	10000	Adatum Corporation
RC00005	:	10000	Adatum Corporation
RC00006	:	10000	Adatum Corporation

Click on the navigation menu item popup **Actions**





Click on the navigation menu item **Re-Open Rental Contract**

Dynamics 365 Business Central

← COMPLETED RENTAL CONTRACT | WORK DATE: 5/29/2020

Rental Contract · RC000006

Rental | **Actions** | Navigate | Fewer options

Re-Open Rental Contract

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/29/2020

Click on the cell **Type** with the value **G/L Account**
Item Resource Fixed Asset Charge (Item)

Type	No.	Description	Location Code
→			
G/L Account			
Item			
Resource			
Fixed Asset			
Ship Charge (Item)			

Ship-to Code

Ship-to Code

Click on the cell **No.**

RU000008-001		18 G Brad Nailer	MONTH-PE
RU000008-002		18 G Brad Nailer	MONTH-PE

Sales Lines | Manage | Line | Fewer options

Type	No.	Description	Location Code
→			
G/L Account			

Shipping

Ship-to Code

Click on the link **Select from full list**

Description	Location Code	Quantity	Unit or Measure Code	Unit Price Excl. Tax	Tax Group Code
✓		0		0.00	*

Income/Ba... | Bloc... | Direct Post...

Checking account	Balance Sh...				
Saving account	Balance Sh...				
Petty Cash	Balance Sh...				
Accounts Receivable	Balance Sh...				
Prepaid Rent	Balance Sh...				
Prepaid Insurance	Balance Sh...				

Select from full list

Ship

ODT Rentals Online Help

Click on the cell **Tax Group Code** with the value **NONTAXABLE**

If the Tax Group Code that defaults onto the Sales Lines is not the one that is to be applied to the sale, then look-up and select the applicable Tax Group Code.

MONTH-PE...	1	EAST			4/30/2020	5/29/2020	15
MONTH-PE...	1	EAST			4/30/2020	5/29/2020	15

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Lin
	1		75.00	NONTAXA...	0.00	0.00	

Click on the lookup button in the cell **Tax Group Code**

Line	Description	Unit of Measure	Quantity	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Line Discount
1-PE...	EAST		1	75.00	NONTA	75.00	75.00	




Click on the link in cell **Code** with the value **SUPPLIES**

Quantity	Unit or Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Line Disco
1		75.00	NONTA	75.00	75.00	
			<div> <div>Code ↑</div> <div>Description</div> </div>			
			FURNITURE Taxable Olympic Furniture			
			LABOR Labor on Job			
			MATERIALS Taxable Raw Materials			
			→ NONTAXABLE Nontaxable			
			SUPPLIES Taxable Olympic Supplies			
			+ New			

Click on the field **Posting Date**

The Posting Date field will contain the date of the last posting transaction on the contract.

RENTAL CONTRACT · RC00006

.....	Adatum Corporation	▼
.....		
.....	5/29/2020	
.....	4/30/2020	
.....	5/29/2020	

If a different date is required for the posting of the invoice for the sales line, then either enter the date, or open the calendar and select the applicable date.



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Manage Process Contract **Rental** Actions Navigate Fewer options

EDIT - RENTAL CONTRACT - RENTAL CONTRACT - RC00006

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/29/2020

Order Date 4/30/2020

Click on the navigation menu item **Invoice**

s Central

Process Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

.....

ate 5/29/2020

e 4/30/2020

Click on the button **Yes**

When Yes is selected and the invoice posts, then the contract will close as the rentals and sales will be fully invoiced.

Are you sure you want to Invoice this rental contract?

Yes No

Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Currency

Click on the button **OK**

Invoice Posted Successfully.

OK

Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Line Discount %	Currency

Other processes that can be done on the re-opened contract include:

- A Rental Unit can be added to the contract on the rental lines and be processed as per standard rental processing.
 - A Corrective Rental Credit Memo can be created for the most recent invoice, which when posted will re-open the Rental Amount Lines related to the invoice, and create a Rental Value Entry or entries recording the applicable credits.
- The Rental Price and Line Discount % fields can be modified, which will update the Rental Amount Lines, and the contract can be re-invoiced.



3.4.14.3. How to Add Metered Usage to a Re-opened Contract

The following example demonstrates the revising of the Metered Usage on a re-opened contract, when the pricing includes Metered Usage pricing.

In this example, the incorrect Current Meter Reading was entered and invoiced. The Current Meter Reading will be modified and the usage will be billable to the customer, therefore an invoice will be posted.

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

5/7/2020

4/8/2020 Type the date in the format M/d/yyyy

5/7/2020

Click on **Rental Unit No. = RU00023-002, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
→ RU00023	:	Ford 150 Trucks Group	MONTH-PE..	
RU00023-002	:	Ford 150 Trucks	MONTH-PE..	

Sales Lines Manage Line Fewer options

Click on the cell **Current Meter Reading** with the value **6,100**

Qty. to Rent	Qty. on Rent	Qty. to Return	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Q. Return
0	0	0	0	0	0	0	
0	0	0	6,100	6,100	0	0	

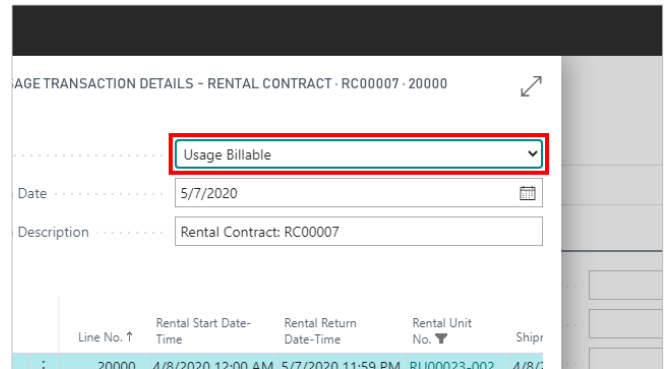
Enter the text **6200**.

When you move off the field, the Usage Transaction Details page will open, where the Entry Type, Posting Date and Description can be modified, if required,

Qty. to Rent	Qty. on Rent	Qty. to Return	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Q. Return
0	0	0	0	0	0	0	
0	0	0	6,100	6,100	0	0	

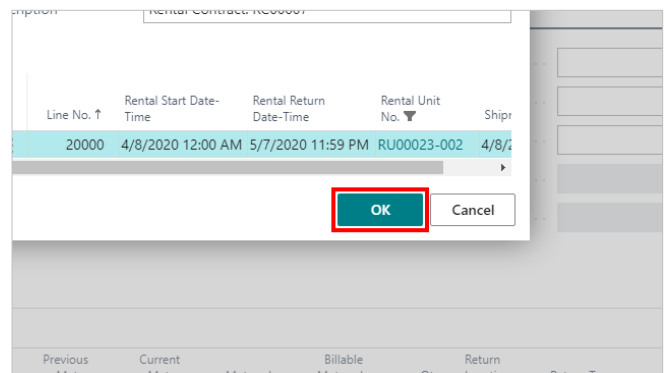
Click on the field **Entry Type**

The Entry Type field contains 2 options, Billable Usage and Adjustment. When the customer is to be billed the Billable Usage option must be selected.

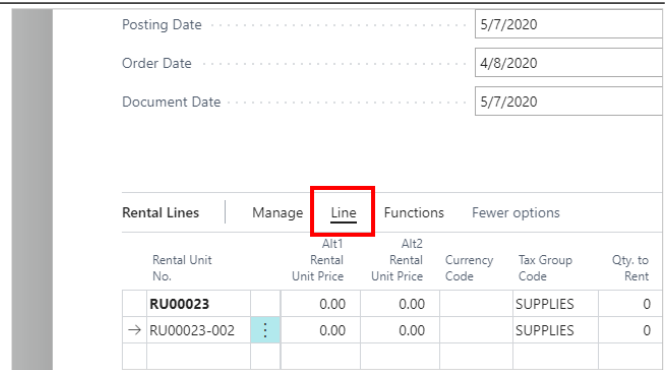


In this example, the Posting Date of the last invoice date will be used and the Description will be left as the contract number.

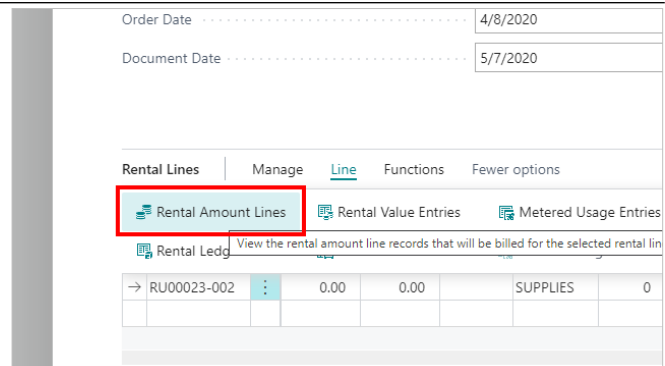
Click on the button **OK**



Click on the navigation menu item popup **Line**



Click on the navigation menu item **Rental Amount Lines**



In the Rental Amount Lines a new line has been added with a type of Metered Usage, for the additional 100 Miles that is to be billed to the customer.



ODT Rentals Online Help

Click on the cell **Type** with the value **Metered Usage**

Contract	Rental	Actions	Navigate	Type ↑	Starting Date-Time ↑	Ending Date
				Rental	4/8/2020 12:00 AM	5/7/2020
				Metered...	4/8/2020 12:00 AM	5/7/2020
				Metered...	4/8/2020 12:00 AM	5/7/2020
				Metered...	4/8/2020 12:00 AM	5/7/2020
				Metered...	4/8/2020 12:00 AM	5/7/2020
				Metered...	4/8/2020 12:00 AM	5/7/2020
				Metered Usage		

Click on the cell **Extended Quantity** with the value **100**

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Price Excl. Tax	Amount Excl. Tax	Curre... Code	Includ
4/8/2020 12:00 AM	5/7/2020 11:59 PM	1	1,200...	1,200.00		1,224
4/8/2020 12:00 AM	5/7/2020 11:59 PM	2,000	0.00	0.00		0
4/8/2020 12:00 AM	5/7/2020 11:59 PM	2,000	1.00	2,000.00		2,040
4/8/2020 12:00 AM	5/7/2020 11:59 PM	2,050	2.00	4,100.00		4,182
4/8/2020 12:00 AM	5/7/2020 11:59 PM	100	2.00	200.00		204

Click on the cell **Billed**

Note that the field is not checked, which indicates that the Rental Amount Line has not been invoiced.

Curre... Code	Including Tax	Tax Group Code	Billing Date ↑	Billed
	1,224.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
	0.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
	2,040.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
	4,182.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
	204.00	SUPPLIES	5/7/2020	<input type="checkbox"/>

Click on the button **Close**

0.00	0.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
2,000.00	2,040.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
4,100.00	4,182.00	SUPPLIES	5/7/2020	<input checked="" type="checkbox"/>
200.00	204.00	SUPPLIES	5/7/2020	<input type="checkbox"/>



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 5/7/2020

Rental Contract · RC00007

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/7/2020

Click on the navigation menu item **Invoice**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 5/7/2020

Rental Contract · RC00007

Contract **Rental** Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

Posting Date 5/7/2020

Click on the button **Yes**

Outstanding Amount 0

Are you sure you want to Invoice this rental contract?

Yes No

Return Location Code	Return Location
0	6,100
6,200	100
100	100
1	

To address the incorrect entry of the Current Meter Reading which was invoiced, there is another process, which could be done once the contract was re-opened.

A Corrective Rental Credit Memo could have been processed and posted, which would have opened the Rental Amount Lines that were invoiced, then the Current Meter Reading could have been revised and the contract re-invoiced.

3.4.14.4. How to Add Periodic Usage to a Re-opened Contract

The following example demonstrates the revising of the Periodic Usage Entries on a re-opened contract for days that were not billed, which should have been billed to the customer.



Press and hold the **Shift** key down.

Click on **the last record in the range of dates that is to have the usage set to Periodic Usage**

No.	Description	Order
1	RENTAL	RC00005
2	RENTAL	RC00005
3	RENTAL	RC00005
4	RENTAL	RC00005
5	RENTAL	RC00005
6	RENTAL	RC00005
7	RENTAL	RC00005
8	RENTAL	RC00005
9	RENTAL	RC00005
10	RENTAL	RC00005

Click on the navigation menu item **Set Usage**

Document Type	Document No.	Document Line No.	Usage Type	Date	Day	Non.
Order	RC00005	20000	Periodic Us...	5/1/2020	Friday	<input type="checkbox"/>
Order	RC00005	20000	Periodic Us...	5/2/2020	Saturday	<input type="checkbox"/>
Order	RC00005	20000	Periodic Us...	5/3/2020	Sunday	<input type="checkbox"/>
Order	RC00005	20000	Periodic Us...	5/4/2020	Monday	<input type="checkbox"/>
Order	RC00005	20000	Periodic Us...	5/5/2020	Tuesday	<input type="checkbox"/>
Order	RC00005	20000	Periodic Us...	5/6/2020	Wednesday	<input type="checkbox"/>

Click on the button **OK**

All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel

Click on the button **Close**

20/2020 Wednesday ☐ ☒

21/2020 Thursday ☐ ☒

22/2020 Friday ☐ ☒

23/2020 Saturday ☐ ☒

24/2020 Sunday ☐ ☒

25/2020 Monday ☐ ☐

26/2020 Tuesday ☐ ☐

27/2020 Wednesday ☐ ☐

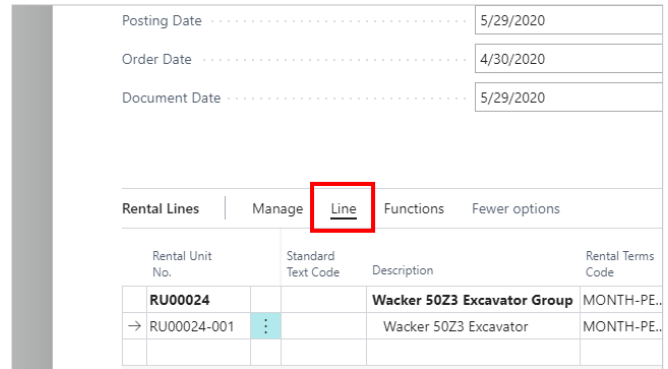
28/2020 Thursday ☐ ☐

29/2020 Friday ☐ ☐

Close

ODT Rentals Online Help

Click on the navigation menu item popup **Line**



Posting Date 5/29/2020

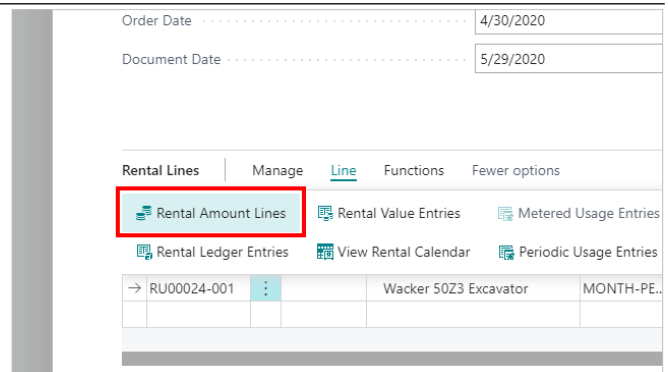
Order Date 4/30/2020

Document Date 5/29/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00024		Wacker 50Z3 Excavator Group	MONTH-PE..
→ RU00024-001	:	Wacker 50Z3 Excavator	MONTH-PE..

Click on the navigation menu item **Rental Amount Lines**



Order Date 4/30/2020

Document Date 5/29/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

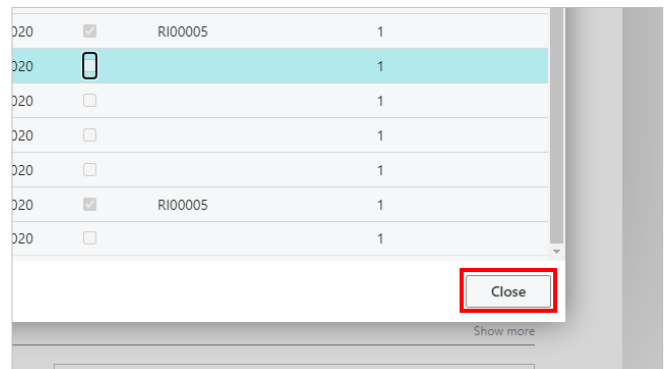
Rental Amount Lines | Rental Value Entries | Metered Usage Entries

Rental Ledger Entries | View Rental Calendar | Periodic Usage Entries

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00024-001	:	Wacker 50Z3 Excavator	MONTH-PE..

In the Rental Amount Lines, notice that new records have been created for the selected days in the Periodic Usage Entries that were set to Periodic Usage. These records will be invoiced when the invoice is posted.

Click on the button **Close**

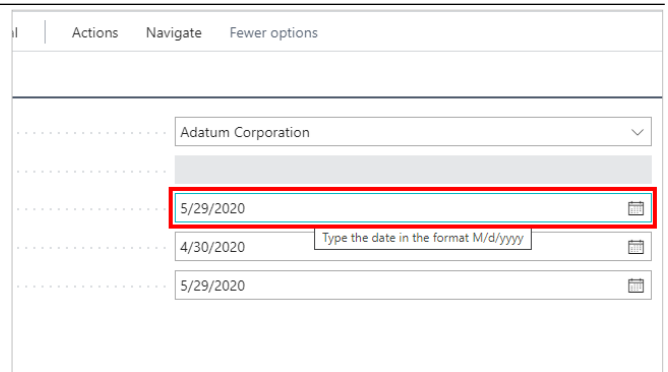


020	<input checked="" type="checkbox"/>	RI00005	1
020	<input type="checkbox"/>		1
020	<input type="checkbox"/>		1
020	<input type="checkbox"/>		1
020	<input type="checkbox"/>		1
020	<input checked="" type="checkbox"/>	RI00005	1
020	<input type="checkbox"/>		1

Close

Show more

Click on the field **Posting Date**



Actions | Navigate | Fewer options

Adatum Corporation

5/29/2020

4/30/2020 Type the date in the format M/d/yyyy

5/29/2020

The Posting Date can be changed, if required, however, it is recommended to use the same date as the same date as the invoice that had been posted for the period the dates fall within.



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/29/2020

Rental Contract · RC000005

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/29/2020

Click on the navigation menu item **Invoice**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/29/2020

Rental Contract · RC000005

Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

Posting Date 5/29/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

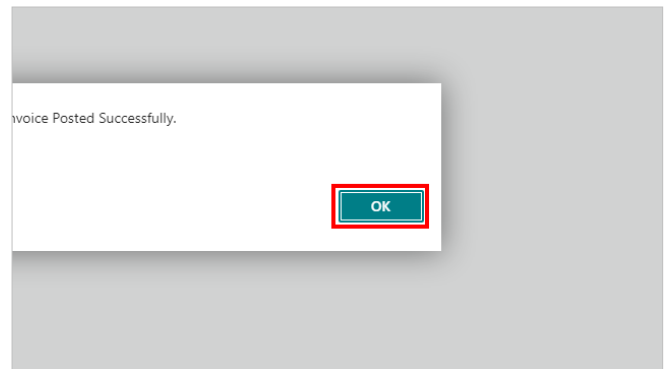
Click on the button **Yes**

Outstanding Amount

There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

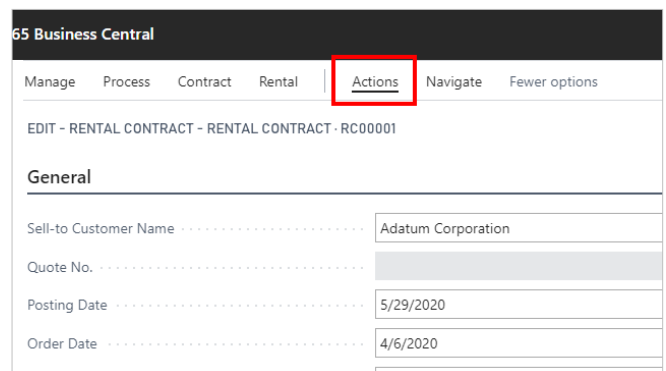
Click on the button **OK**



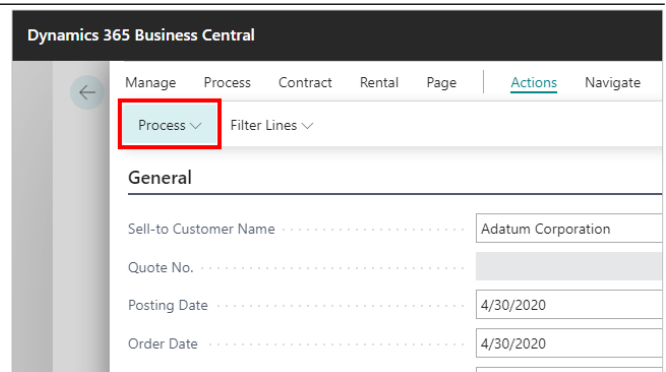
3.4.14.5. How to Close a Contract Re-opened by Mistake

The following demonstrates how to close a Rental Contract that was re-opened by mistake.

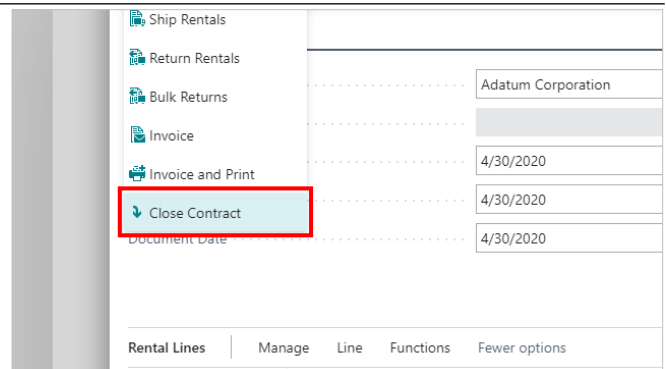
Click on the navigation menu item popup **Actions**



Click on the navigation menu item popup **Process**



Click on the navigation menu item **Close Contract**



3.4.15. How to Review Dimensions on Rental Documents

3.4.15.1. Overview

The Rental Quotes and Contracts can have Dimensions for the contract and for both the Rental and Sales Lines.



The Dimension Codes and Values for the contract will default from the Customer when assigned to the customer. Additional Dimension Codes and Values can be added, should this be required.

The Dimension Codes and Values for the Rental Lines will default from the Rental Units selected, The Dimensions are per unit line.

The Dimension Codes and Values for the Sales Lines will default from the G/L Account, Item, Resource or Charge Item selected, The Dimensions are per sales line.

Additional Dimension Codes and Values can be added to the Rental and Sales Lines, should this be required.

The two Global Dimension fields are displayed by default on the Rental and Sales Lines. When Dimension Values are entered on the lines, then the Dimensions displayed when selecting the menu options on the lines, will be updated.

To learn about assigning Dimensions to Rental Units, see ODT Rentals Online help, Setup Rentals, Set Up Rental Units, How to Set Up Dimensions on Rental Units.

Profile - Sales Order Processor

The same steps apply to users having the Business Manager Profile.

3.4.15.2. How to Review the Rental Contract or Quote Dimensions

Click on the navigation menu item popup **Contract**

Dynamics 365 Business Central Rental Contract · RC00020

RENTAL CONTRACT

Rental Contract · RC00020

Process **Contract** Rental Actions Navigation

Ship Rentals Return Rentals Invoice Invoice

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Dimensions**

Dynamics 365 Business Central Rental Contract · RC00020

RENTAL CONTRACT

Rental Contract · RC00020

Process Contract Rental Actions Navigation

Customer **Dimensions**

View or edit dimensions, such as area, project, or

General

Sell-to Customer Name Adatum Corporation

Quote No.



Click on the cell **Dimension Code** with the value
CUSTOMERGROUP

EDIT - RENTAL CONTRACT RC00020 - EDIT DIMENSION SET

DIMENSION CODE	DIMENSION
CUSTOMERGROUP	LARGE

Click on the button **Close**

Large business

Close

3.4.15.3. How to Review the Rental Line Dimensions

Click on the cell **Rental Unit No.**

Rental Lines | Manage | More options

New Line | Delete Line | Expand All | Collapse All

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher

Sales Lines | Manage | More options

Click on the navigation menu item **More options**

Quote no.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | Manage | More options

New Line | Delete Line | Expand All | Collapse All | Group

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND



Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | Manage | **Line** | Functions | Less options

New Line Delete Line Expand All Collapse All Group

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item **Dimensions**

Contract Total
Outstanding Amount

options

ntal Value Entries Additional Notes **Dimensions**

View or edit dimensions, such as area, project, or dep

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENT RETU DATE
MONTH-PEND	2	EAST			4/9/2018	5/8/2
MONTH-PEND	1	EAST			4/9/2018	5/8/2

Click on the cell **Dimension Code** with the value **DEPARTMENT**

The Dimensions assigned to the Rental Line are comprised of the Dimensions on the contract and from the Rental Unit on the line.

NTAL CONTRACT

ental Contract

Process Contract Rental

Customer Dimensions

General

to Customer Name

ote No.

osting Date

Search + New Edit List X D

EDIT - ORDER RC00020 20000 - EDIT DIMENSION SET ENT

DIMENSION CODE	DIME
CUSTOMERGROUP	LARGE
DEPARTMENT	SALES

Click on the button **Close**

Large Business

Sales

Show m

0.

12,280.

g Amount 12,280.

Close

Close



3.4.15.4.

How to Review the Sales Line Dimensions

Click on the cell **Type**

RU00001		Buckeye Ditcher Group	
RU00002	⋮	Buckeye Ditcher	
RU00003		Buckeye Ditcher	
Sales Lines		Manage	More options
TYPE	NO.	DESCRIPTION	LOCATION CODE
Item	⋮	1896-S	ATHENS Desk
Item			

Click on the navigation menu item **More options**

RU00001		Buckeye Ditcher Group		MONTH-PEND
RU00002	⋮	Buckeye Ditcher		MONTH-PEND
RU00003		Buckeye Ditcher		MONTH-PEND
Sales Lines		Manage	More options	
G/L Account			Reveal secondary actions	
Item				
Resource				
Fixed Asset				
Charge (Item)				
Item	⋮	1896-S	ATHENS Desk	EAST

Click on the navigation menu item popup **Line**

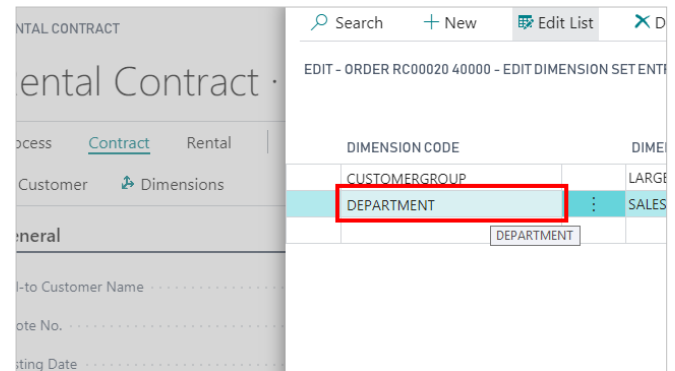
RU00001		Buckeye Ditcher Group		MONTH-PEND
RU00002	⋮	Buckeye Ditcher		MONTH-PEND
RU00003		Buckeye Ditcher		MONTH-PEND
Sales Lines		Manage	Line	Less options
TYPE	NO.	DESCRIPTION	LOCATION CODE	
Item	⋮	1896-S	ATHENS Desk	EAST

Click on the navigation menu item **Dimensions**

RU00001		Buckeye Ditcher Group	
RU00002	⋮	Buckeye Ditcher	
RU00003		Buckeye Ditcher	

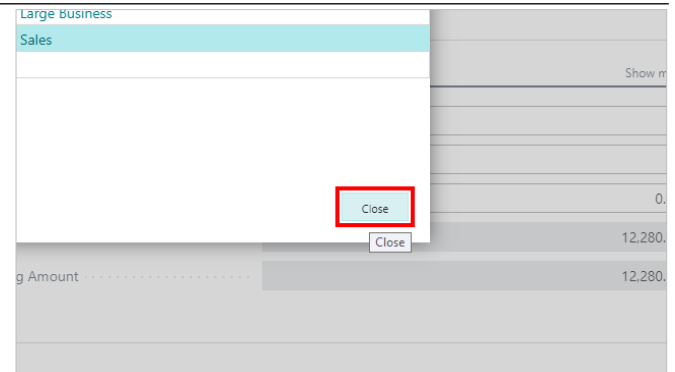
Click on the cell **Dimension Code** with the value **DEPARTMENT**

The Dimensions assigned to the Sale Line are comprised of the Dimensions on the contract and from the item on the line.



The screenshot shows the 'Rental Contract' interface. On the right, there is a table with columns 'DIMENSION CODE' and 'DIME'. The row for 'DEPARTMENT' is highlighted in light blue, and the cell is enclosed in a red rectangular box. Above the table, there are tabs for 'Contract' and 'Rental', and a 'Dimensions' link. The top of the interface includes a search bar and buttons for '+ New', 'Edit List', and a close icon.

Click on the button **Close**



This screenshot shows a modal window or dropdown menu that appears over the main interface. It contains a list with 'Large Business' and 'Sales' items. At the bottom right of this window, a 'Close' button is highlighted with a red rectangular box. The background interface is partially visible, showing a table with numerical values.

3.5. Quick Rentals

3.5.1. Quick Rentals Overview

3.5.1.1. Overview

The Quick Rental feature provides the ability to add Rental groups and Rental Units to the Rental Lines of an existing open rental document or create a new Rental Quote or Rental Contract with the selected rental groups and units automatically populated on the Rental Lines.

The Quick Rental feature is available on the Group Avail. Matrix, the Rental Unit Availability Matrix, and the Rental Inventory Avail. when accessed from the Business Manager and Sales Order Processor role centers or via Search.

NOTE:

This feature is not available from the Rental Lines menu options of Group Avail Matrix and its' Rental Unit Availability Matrix or the Rental Inventory Avail.

3.5.1.2. Quick Rental Document Options

The following picture displays the Quick Rental Document request page when opened from the Group Availability Matrix.

Quick Rental Document

Options

Document Type

Rental Contract

Document No.

*

Sell-to Customer No.

Sell-to Customer Name

Rental Start Date

5/9/2022

Rental End Date

Quantity Required

1

Rental Terms Code

Location Code

Advanced >

OK

Cancel

The following provides a brief overview of the fields on the request page.

- **Document Type:** Is used to specify whether the Quick Rental will be for a Rental Contract or Rental Quote.
- **Document No.:** When the rental groups or units are to be added to an existing contract or quote, then look-up and select the applicable document. When a new rental document is to be created this field is to be left blank.
- **Sell-to Customer No.:** When adding to an existing rental document the Sell-to Customer No. on the selected rental document will be displayed. When a new rental document is to be created, then look-up and select the Customer.
- **Sell-to Customer Name:** Displays the Sell-to Customer Name of the Sell-to Customer No.
- **Rental Start Date:** The User Work Date defaults to this field and can be modified to specify the date that is to populate the Rental Start Date on the Rental Lines.
- **Rental End Date:** If expected return date is known then it can be entered and will populate the Rental Return Date on the Rental Lines. If the field is left blank and on Rental Management Setup the Default Blank Return Date is not enabled, then the Rental Return Date will be set as one period based on the Rental Term. If the Default Blank Return Date is enabled, then the Rental Return Date will be blank on the Rental Lines.

- **Quantity Required:** Is used to specify the quantity of Rental Units that are required for the selected rental group or for Rental Units linked to Items. The quantity entered will populate the Rental line, Rental Quantity field on rentals lines.
- **Rental Terms Code:** The entry of a Rental Term code is not mandatory. If a Rental Term is specified, then it will default to the Rental Lines.

When a Rental Term is not specified and on Rental Management Setup the Use Unit Rental Terms field is enabled, then if the group or units have a Default Rental Term, that term will default to the Rental Lines.

When a Rental Term is not specified and on Rental Management Setup the Use Unit Rental Terms field is not enabled the following occurs.

Then when a new rental document is to be created and the Customer card has a Rental Term, it defaults to the new rental document header and then defaults to the Rental Lines.

Or if appending to an existing rental document that has a Rental Term on the document header, the term will default to the new Rental Lines.

- **Location Code:** The entry of a Location Code is not mandatory. When a location is specified, it will default to the rental lines. If not specified and the rental group or units do have a Location code, then the Location will default to the rental lines. If the Rental Units do not have a Location Code and Locations are mandatory, then the Location Code must be entered on the Rental Lines.

3.5.2. How to Process a Quick Rental from the Group Availability Matrix

3.5.2.1. Overview

The Quick Rental function accessed from the global Group Availability Matrix and Rental Unit Availability Matrix provides the ability to either add to an existing quote or contract or create a new quote or contract for the selected rental groups or selected Rental Units.

When running the Quick Rental from the Group Availability Matrix the quantity required for the rental group, Rental Start Date, Rental End Date, Rental Terms Code and Location can be specified on the request page.

The Quick Rental feature allows for the selection of multiple rental groups from the Group Availability Matrix before selecting the menu option.

When running the Quick Rental from the Rental Unit Availability Matrix the Rental Start Date, Rental End Date and Rental Terms Code can be specified on the request page.

The Required Quantity and Location Code is not available on the Rental Unit Availability Matrix, Quick Rental request page. The location will default from the Rental Units selected.

When a Rental Term is specified, if the rental groups or units do not have a Rental Price card for the Rental Term, then the Rental Unit Price on the Rental Lines will be set to 0.00 and need to be populated.

NOTE:

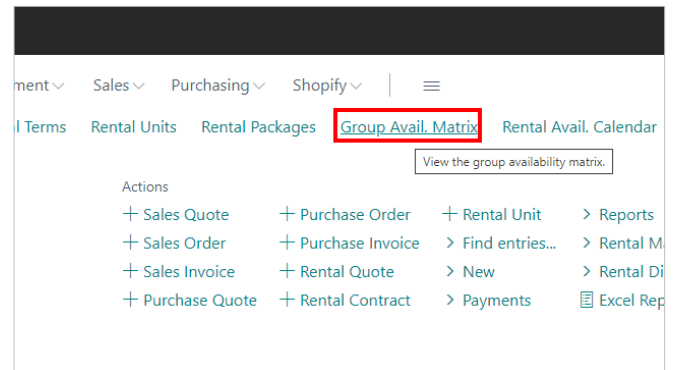
This feature is not available from the Rental Lines, Group Availability Matrix, or the Rental Unit Availability Matrix.

3.5.2.2. How to Process a Quick Rental from the Group Availability Matrix

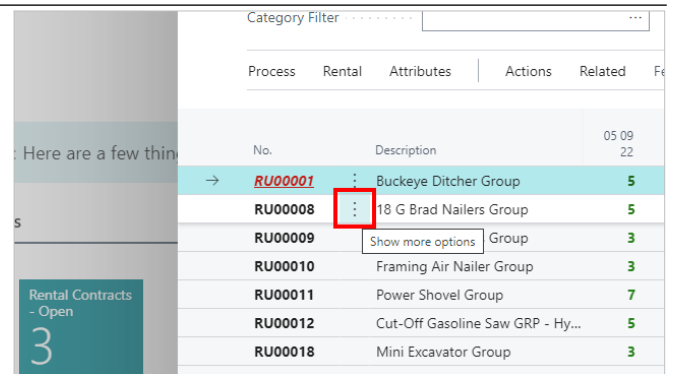
The following demonstrates the Quick Rental for creating a new Rental Contract when have selected multiple

rental groups that will require the same quantity, Rental Start Date, Rental End Date and Rental Term.

Click on the navigation menu item **Group Avail. Matrix**

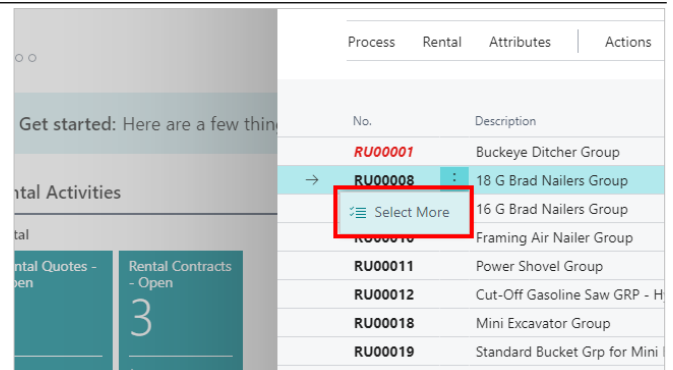


Click on the row menu button

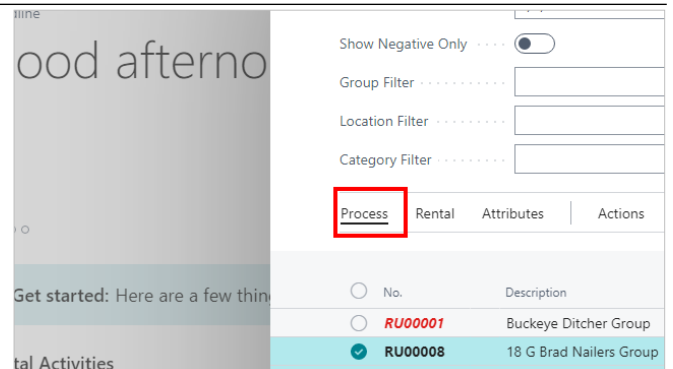


Click on the menu item **Select More**

Select the group or groups to be added to the new Rental Contract.



Click on the navigation menu item popup **Process**





Click on the navigation menu item **Quick Rental**

The screenshot shows the 'Quick Rental' button highlighted in a red box. The interface includes filters for Group, Location, and Category, and a table of rental units.

No.	Description	Net Available	Reserved
RU00001	Buckeye Ditcher Group	5	5
RU00008	18 G Brad Nailers Group	5	5
RU00009	16 G Brad Nailers Group	3	3
RU00010	Framing Air Nailer Group	3	3

Click on the lookup button **Sell-to Customer No.**

The screenshot shows the 'Sell-to Customer No.' dropdown menu open, with a red box highlighting the dropdown arrow. The menu lists various customer numbers and names.

No.	Customer Name
10000	Trey Research
20000	School of Fine Art
30000	Alpine Ski House
40000	Relecloud

Click on the link in cell **No.** with the value **20000**

The screenshot shows the 'No.' dropdown menu open, with the value 20000 selected. The menu lists various customer numbers and names.

No.	Customer Name
10000	Trey Research
20000	School of Fine Art
30000	Alpine Ski House
40000	Relecloud

Click on the link **Open the date picker for Rental Start Date**

The screenshot shows the 'Rental Start Date' date picker open, with a red box highlighting the date picker icon. The date picker shows the date 5/9/2022.

No.	Customer Name
10000	Trey Research
20000	School of Fine Art
30000	Alpine Ski House
40000	Relecloud



ODT Rentals Online Help

Click on a date in the calendar

Select the date that is to be the Rental Start Date on the Rental Lines.

Document Type: Rental Contract
Document No.: *
Sell-to Customer No.: 20000
Sell-to Customer Name: Trey Research
Rental Start Date: 5/9/2022
Rental End Date:
Quantity Required: 1
Rental Terms Code:
Location Code:
Advanced >

Click on the field **Rental End Date**

Document Type: Rental Contract
Document No.: *
Sell-to Customer No.: 20000
Sell-to Customer Name: Trey Research
Rental Start Date: 5/11/2022
Rental End Date:
Quantity Required: Type the date
Rental Terms Code:
Location Code:
J00001
J00008
J00009
J00010
J00011
J00012
J00018
J00019
J00020
J00021

Click on the link **Open the date picker for Rental End Date**

If the expected Return Date is known, then select or enter the date.

Document Type: Rental Contract
Document No.: *
Sell-to Customer No.: 20000
Sell-to Customer Name: Trey Research
Rental Start Date: 5/11/2022
Rental End Date:
Quantity Required:
Rental Terms Code:
Location Code:
Open the date picker for Rental End Date

Click on a date in the calendar

Select the date that is to be the Rental Return Date on the Rental Lines.

Document Type: Rental Contract
Document No.: *
Sell-to Customer No.: 20000
Sell-to Customer Name: Trey Research
Rental Start Date: 5/11/2022
Rental End Date:
Quantity Required: 1
Rental Terms Code:
Location Code:
Advanced >
OK Cancel



ODT Rentals Online Help

Click on the field **Quantity Required**

Document No.	.....	...
Sell-to Customer No.	.....	20000
Sell-to Customer Name	.....	Trey Research
Rental Start Date	.....	5/11/2022
Rental End Date	.....	7/10/2022
Quantity Required	.....	1
Rental Terms Code	.....
Location Code	.....
Advanced >		

Enter the text **2**.

Document No.	.....	...
Sell-to Customer No.	.....	20000
Sell-to Customer Name	.....	Trey Research
Rental Start Date	.....	5/11/2022
Rental End Date	.....	7/10/2022
Quantity Required	.....	2
Rental Terms Code	.....	10/15/2022
Location Code	.....
Advanced >		

Click on the lookup button **Rental Terms Code**

20000	5	5	5
Trey Research	3	3	5
5/11/2022	3	3	3
7/10/2022	3	3	3
2	7	7	7
	5	5	5
	5	5	5
Choose a value for Rental Terms Code	3	3	3
	3	3	3
	2	2	2
	3	3	3
	3	3	3

Click on the link in cell **Code** with the value **MONTH-PEND**

Select the Rental Term that is to default to the Rental Terms Code on the Rental Lines.

Quantity Required	.....	2
Rental Terms Code	.....
Location Code	.....
Advanced >		
Code Description		
MONTH-END-TIME Monthly Rental for B		
MONTH-PEND Monthly Rental - Per		
MONTH-PEND Select record "MONTH-PEND" al - Ear		
MONTH-PEND-OPT Monthly Rental - Per		
MONTH-PEND-PRO Monthly Rental - Per		
Wacker Skid Steer - Utility Fork...		
Portable Generators 3 3 3 3 3		



Click on the button **OK**

Code	Quantity
5	5
3	3
3	3
2	2
3	3
3	3
2	2
3	3
er Skid Steer - Utility Fork...	3
ble Generators	3
compact Wrenches 1/2 Inch	2

Click on the button **Yes**

Description	Quantity
5	5
3	3
3	3
3	3
7	7
5	5
Mini Excavator Group	3
Standard Bucket Grp for Mini E...	5
Breaker Group for Mini Excavat...	3
Vibrator Plate Group for Mini E...	3
Wacker Skid Steer Group	2

Click on the field **Posting Date**

The Posting Date is populated based on the User Work Date.

No. ↑	Process	Contract	Rental	Job	Actions	Related	Fewer
RC00009							
RC00010							
RC00011							
RC00013							

General	
Sell-to Customer Na...	Trey Research
Quote No.	
Posting Date	5/9/2022
Order Date	5/9/2022
Document Date	5/9/2022
External Document No. ..	

Click on the cell **Rental Unit No.** with the value **RU00008**

Note that both groups with the Rental Quantity of 2 and their respective child unit lines are created. The child line Rental Units will need to be selected. Note that the Rental Terms Code has defaulted from the term entered on the Quick Rental.

Rental Unit No.	Rental Terms Code	Rental Quantity	Line
RU00008	MONTH-PEND	2	
	MONTH-PEND	1	
	MONTH-PEND	1	
RU00009	MONTH-PEND	2	
	MONTH-PEND	1	
	MONTH-PEND	1	

Click on the cell **Rental Start Date** with the value **5/11/2022**

Note that the Rental Start Date and Rental Return Date are populated from the dates selected on the Quick Rental Document.

External Document No. <input type="text"/>		Advanced Proforma			
Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
→ RU00008	:	5/11/2022		7/10/2022	300.00
		5/11/2022	Type the date in the format M/d/yyyy		0.00
		5/11/2022		7/10/2022	300.00
RU00009		5/11/2022		7/10/2022	150.00
		5/11/2022		7/10/2022	150.00
		5/11/2022		7/10/2022	150.00

Click on the cell **Rental Unit Price** with the value **300.00**

The Rental Unit Price is populated on all lines as the rental groups do have Rental Price cards for the selected Rental Term on the Quick Rental. If the rental group does not have a price card, the Rental Unit Price is set to 0.00 and will need to be entered for each group, which defaults to the child unit lines.

<input type="text"/>		Advanced Proforma <input type="checkbox"/>			
Manage	Line	Functions	Related	Fewer options	
Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price
5/11/22			7/10/2022	300.00	0.00
	5/11/2022		7/10/2022	300.00	0.00
	5/11/2022		7/10/2022	300.00	0.00
	5/11/2022		7/10/2022	150.00	0.00
	5/11/2022		7/10/2022	150.00	0.00
	5/11/2022		7/10/2022	150.00	0.00

3.5.2.3. How to Process a Quick Rental from the Rental Unit Availability Matrix

The following demonstrates the Quick Rental from the Rental Unit Availability Matrix which is accessed from the Group Availability Matrix.

In this example, the multiple units of a group will be appended to the Rental Contract created in the previous example.

Information regarding the example:

- Rental Management Setup has the Use Unit Rental Term field enabled
- A Rental Term will not be specified on the Quick Rental Document

- The Rental Units have a Rental Term specified on the Rental Unit Card
- The Rental Group the units are assigned to has a Rental Price Card for the Rental Term that is on the Rental Units

NOTE:

When the Quick Rental is ran from the Rental Unit Availability Matrix the Rental Units are populated on the Rental Lines without the rental group.

Click on the navigation menu item **Group Avail. Matrix**

ment	Sales	Purchasing	Shopify	
Terms	Rental Units	Rental Packages	Group Avail. Matrix	Rental Avail. Calendar
View the group availability matrix.				
Actions				
+ Sales Quote	+ Purchase Order	+ Rental Unit	> Reports	
+ Sales Order	+ Purchase Invoice	> Find entries...	> Rental M	
+ Sales Invoice	+ Rental Quote	> New	> Rental Di	
+ Purchase Quote	+ Rental Contract	> Payments	Excel Rep	

Click on the menu item **Select More**

Process	Rental	Actions	Related	Fewer options
No. ↑	Description			
RU00018-001	Mini Excavator			
→ RU00018-002	Mini Excavator			
RU00018-003	Mini Excavator	Select More		
RU00018-004	Mini Excavator			
RU00018-005	Mini Excavator			

Click on **No. = RU00018-003, Description = Mini Excavator, 05 09 22 = 1**

Process	Rental	Actions	Related	Fewer options
No. ↑	Description			
RU00018-001	Mini Excavator			
→ RU00018-002	Mini Excavator			
RU00018-003	Mini Excavator			
RU00018-004	Mini Excavator			
RU00018-005	Mini Excavator			

Click on the navigation menu item popup **Process**

Options	Start Date	Location Filter	Category Filter
	5/9/2022		
Process			
No. ↑	Description		
RU00018-001	Mini Excavator		
RU00018-002	Mini Excavator		

Click on the navigation menu item **Quick Rental**

Start Date	Location Filter	Category Filter	Attribute Filter	Description	Reserved Qty.
5/9/2022					
Process	Rental	Actions	Related	Fewer options	
Next Set	Previous Set	Quick Rental			
No. ↑	Description				
RU00018-001	Mini Excavator				1
RU00018-002	Mini Excavator				1
→ RU00018-003	Mini Excavator				1
RU00018-004	Mini Excavator				1



ODT Rentals Online Help

Click on the lookup button **Document No.**

The screenshot shows a form with a dropdown menu set to "Rental Contract". Below it, the "Document No." field is highlighted with a red box, and a small "..." button next to it is also highlighted with a red box. A tooltip "Choose a value for Document No." is visible. Other fields include a date field set to "5/9/2022".

Click on the link in cell **No.** with the value **RC00013**

The screenshot shows a table titled "Rental Contract List". The table has columns: No., Sell-to Customer No., and Sell-to Customer. The row for "RC00013" is highlighted with a red box. A tooltip "Select record 'RC00013'" is visible.

No.	Sell-to Customer No.	Sell-to Customer
→ RC00009	10000	Adatum_Corpo
RC00010	20000	Trey Research
RC00011	10000	Adatum Corpo
RC00013	20000	Trey Research

Click on the field **Rental Start Date**

The date in the Rental Start Date field defaults from the users Work Date and can be overridden.

The screenshot shows a form with fields for "Document Type" (Rental Contract), "Document No." (RC00013), "Sell-to Customer No." (20000), "Sell-to Customer Name" (Trey Research), "Rental Start Date" (5/9/2022), "Rental End Date", and "Rental Terms Code". The "Rental Start Date" field is highlighted with a red box. A tooltip "Type the date in the format M/d/yyyy" is visible.

Click on the link **Open the date picker for Rental Start Date**

The screenshot shows the same form as before, but with a red box around the date picker icon (a calendar icon) next to the "Rental Start Date" field. A tooltip "Open the date picker for Rental Start Date" is visible.



ODT Rentals Online Help

Click on a date in the calendar

Il-to Customer No. 20000

Il-to Customer Name Trey Research

Rental Start Date 5/9/2022

Rental End Date

Rental Terms Code

Advanced >

Go to today Done

OK Cancel

Click on the link **Open the date picker for Rental End Date**

If the expected date of the return of the Rental Unit is known, then look-up and select or enter the date.

Rental Contract

RC00013

20000

Trey Research

5/11/2022

Go to today Done

OK Cancel

Click on a date in the calendar

Rental Start Date 5/11/2022

Rental End Date

Rental Terms Code

Advanced >

Go to today Done

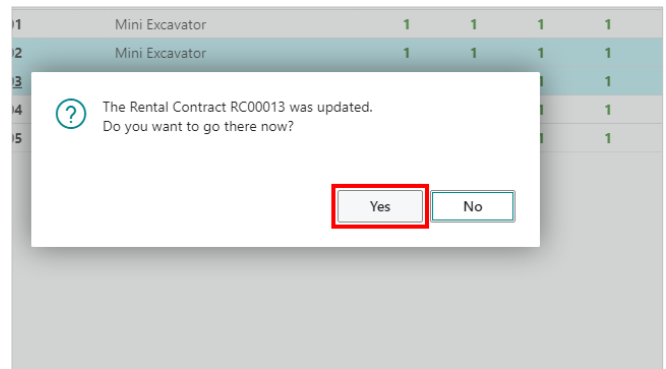
Cancel

Click on the button **OK**

OK Cancel



Click on the button **Yes**



The following displays the results of appending the selected Rental Units to an open Rental Contract.

Click on **Rental Unit No. = RU00018-002**

Note that the selected Rental Units have been added to the Rental lines of the specified Rental Contract.

RU00018	RU00008	18 G Brad Nailers
RU00019		18 G Brad Nailers
RU00020		18 G Brad Nailers
RU00021	RU00009	16 G Brad Nailers
RU00022		16 G Brad Nailers
RU00023		16 G Brad Nailers
RU00024	→ RU00018-002	Mini Excavator
RU00025	RU00018-003	Mini Excavator
RU00028		
RU00029		
RU00030		
RU00031		

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

As the Rental Term was not specified on the Quick Rental Document and Rental Management Setup has the Use Unit Rental Term field enabled, then the Rental Term defaulted from the Rental Unit Card.

08	18 G Brad Nailers Group	MONTH-PEND	2		
	18 G Brad Nailers Group	MONTH-PEND	1		
	18 G Brad Nailers Group	MONTH-PEND	1		
09	16 G Brad Nailers Group	MONTH-PEND	2		
	16 G Brad Nailers Group	MONTH-PEND	1		
	16 G Brad Nailers Group	MONTH-PEND	1		
8-...	Mini Excavator	MONTH-PEND	1	EAST	
8-003	Mini Excavator	MONTH-PEND	1	WEST	

Click on the cell **Rental Start Date** with the value **5/11/2022**

Note that the Rental Start Date and Rental Return Date are populated from the dates selected on the Quick Rental Document.

RU00008	5/11/2022	7/10/2022	300.00
	5/11/2022	7/10/2022	300.00
	5/11/2022	7/10/2022	300.00
RU00009	5/11/2022	7/10/2022	150.00
	5/11/2022	7/10/2022	150.00
	5/11/2022	7/10/2022	150.00
→ RU00018-002	5/11/2022	7/10/2022	900.00
RU00018-003	5/11/2022	Type the date in the format M/d/yyyy	00.00

Click on the cell **Rental Unit Price** with the value **900.00**

As the Rental Group has a Rental Price Card for the Rental Term on the Rental Line the Rental Unit Price is populated.

If there had not been a Rental Price Card on the Rental Group or the Rental Units, then 0.00 would be the price on the line and need to be populated.

	DATE	TERMS	RENTAL PRICE	PRICE	UNIT PRICE	UNIT PRICE	CODE	SL
08	5/11/2022		7/10/2022	300.00	0.00	0.00		SU
	5/11/2022		7/10/2022	300.00	0.00	0.00		SU
	5/11/2022		7/10/2022	300.00	0.00	0.00		SU
09	5/11/2022		7/10/2022	150.00	0.00	0.00		SU
	5/11/2022		7/10/2022	150.00	0.00	0.00		SU
	5/11/2022		7/10/2022	150.00	0.00	0.00		SU
8-002	5/11/22		7/10/2022	900.00	0.00	0.00		SU
8-003	5/11/2022		7/10/2022	900.00	0.00	0.00		SU

3.5.3. How to Process a Quick Rental from Rental Inventory Availability

3.5.3.1. Overview

The Quick Rental function accessed from the global Rental Inventory Avail. provides the ability to either add to an existing quote or contract or create a new quote or contract for the selected rental groups or selected Rental Units.

The Quick Rental feature allows for the selection of multiple Rental Units to be added to the Rental Lines before selecting the menu option.

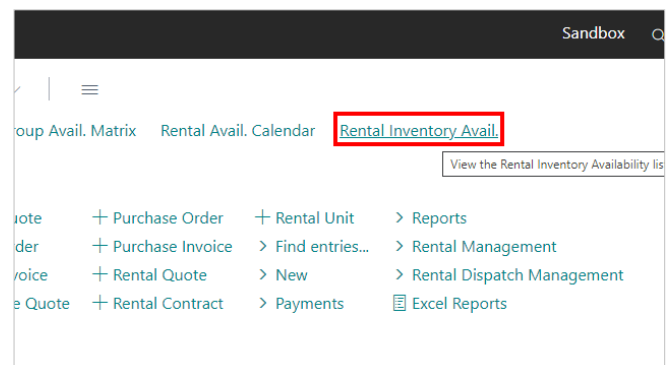
When running the Quick Rental from the Rental Inventory Avail. the quantity required for the Rental Units, Rental Start Date, Rental End Date, Rental Terms Code and Location can be specified on the request page.

When a Rental Term is specified, if the Rental Units do not have a Rental Price card for the Rental Term, then the Rental Unit Price on the Rental Lines will be set to 0.00 and will need to be populated.

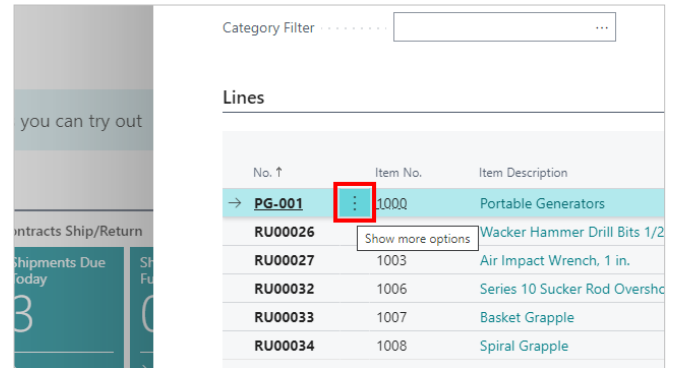
3.5.3.2. How to Process a Quick Rental from the Rental Inventory Availability

The following demonstrates the Quick Rental for creating a new Rental Contract when have selected multiple Rental Units that will require the same quantity, Rental Start Date, Rental End Date, Rental Term and Location Code.

Click on the navigation menu item **Rental Inventory Avail.**

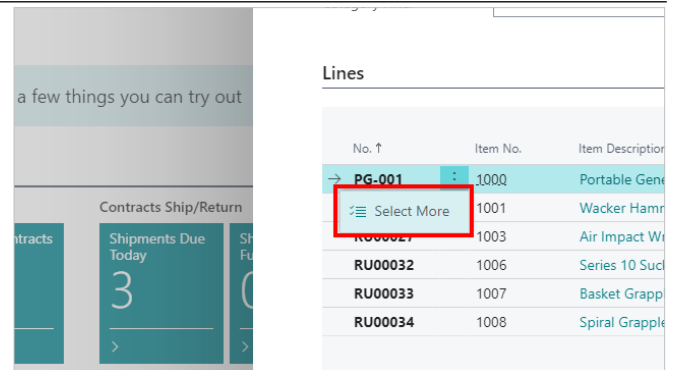


Click on the row menu button



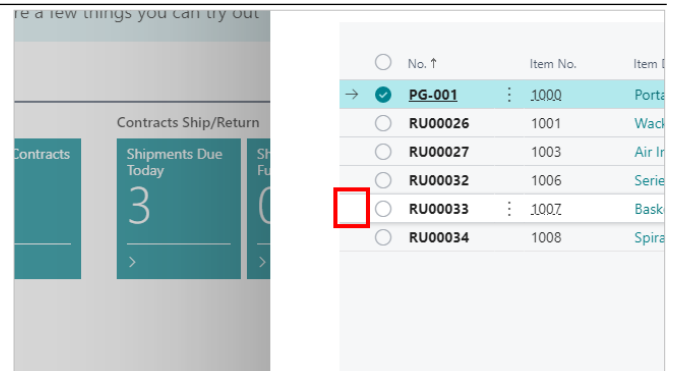
No. ↑	Item No.	Item Description
→ PG-001	1000	Portable Generators
RU00026	1001	Wacker Hammer Drill Bits 1/2
RU00027	1003	Air Impact Wrench, 1 in.
RU00032	1006	Series 10 Sucker Rod Oversho
RU00033	1007	Basket Grapple
RU00034	1008	Spiral Grapple

Click on the menu item **Select More**



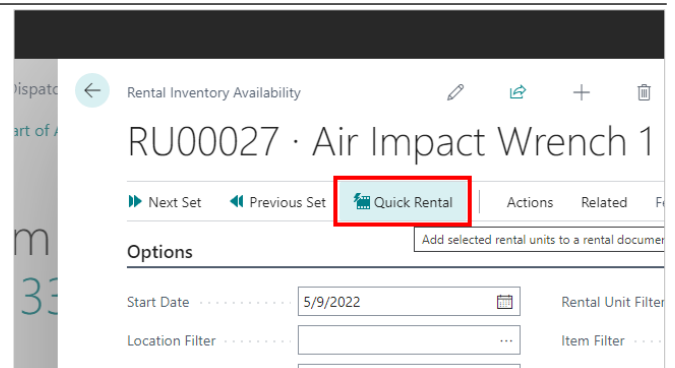
No. ↑	Item No.	Item Description
→ PG-001	1000	Portable Generators
Select More	1001	Wacker Hammer Drill Bits 1/2
RU00027	1003	Air Impact Wrench, 1 in.
RU00032	1006	Series 10 Sucker Rod Oversho
RU00033	1007	Basket Grapple
RU00034	1008	Spiral Grapple

Click on **No. = RU00033, Item No. = 1007, Item Description = Basket Grapple**



No. ↑	Item No.	Item Description
→ PG-001	1000	Portable Generators
RU00026	1001	Wacker Hammer Drill Bits 1/2
RU00027	1003	Air Impact Wrench, 1 in.
RU00032	1006	Series 10 Sucker Rod Oversho
RU00033	1007	Basket Grapple
RU00034	1008	Spiral Grapple

Click on the navigation menu item **Quick Rental**



Rental Inventory Availability	
RU00027 · Air Impact Wrench 1	
Next Set	Previous Set
Quick Rental	Actions Related F
Options	
Start Date	5/9/2022
Location Filter	
Rental Unit Filter	
Item Filter	



Click on the lookup button **Sell-to Customer No.**

Click on the link in cell **No.** with the value **10000**

Click on the field **Rental Start Date**

The Start Date defaults from the User Work Date. If the Start Date is to be different, either look-up and select the date or enter the date.

Click on the field **Rental End Date**

If the expected Return Date is known, then select or enter the date.



ODT Rentals Online Help

Click on the link **Open the date picker for Rental End Date**

The screenshot shows a 'Rental Contract' form. The 'Rental End Date' field is highlighted with a red box, and a calendar icon is visible next to it. The form includes fields for 'Rental Contract', '10000', 'Adatum Corporation', '5/9/2022', and a 'Quantity Required' field with the value '1'. A table on the right side of the form displays dates and quantities.

Click on a date in the calendar

The screenshot shows a date picker calendar for June 2022. The date 6/24/2022 is selected and highlighted with a red box. The calendar includes a 'Go to today' button and a 'Done' button. The form fields on the left are partially visible.

Click on the field **Quantity Required**

The screenshot shows the 'Rental Contract' form with the 'Quantity Required' field highlighted with a red box. The field contains the value '1'. The form includes fields for 'Document No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'Rental Start Date', 'Rental End Date', 'Rental Terms Code', and 'Location Code'. An 'Advanced' link is visible at the bottom.

Enter the text **2**.

The screenshot shows the 'Rental Contract' form with the 'Quantity Required' field highlighted with a red box. The field now contains the text '2'. The form includes fields for 'Document No.', 'Sell-to Customer No.', 'Sell-to Customer Name', 'Rental Start Date', 'Rental End Date', 'Rental Terms Code', and 'Location Code'. An 'Advanced' link is visible at the bottom.



ODT Rentals Online Help

Click on the lookup button **Rental Terms Code**

10000
Adatum Corporation
5/9/2022
6/24/2022
2
Choose a value for Rental Terms Code

Click on the link in cell **Code** with the value **MONTH-PEND-PRO**

Location Code
Advanced >
Code Description
MONTH-END-TIME Monthly Rental for B
MONTH-PEND Monthly Rental - Per
MONTH-PEND EARLY Monthly Rental - Ear
MONTH-PEND-OPT Monthly Rental - Per
MONTH-PEND-PRO Monthly Rental - Per
Select record "MONTH-PEND-PRO"

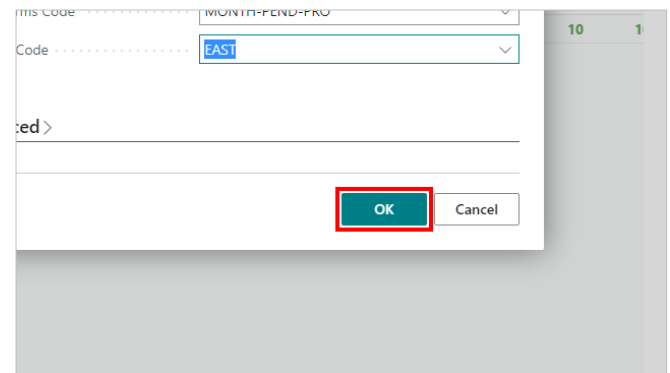
Click on the lookup button **Location Code**

Adatum Corporation
5/9/2022
6/24/2022
2
MONTH-PEND-PRO
Choose a value for Location Code
OK Cancel

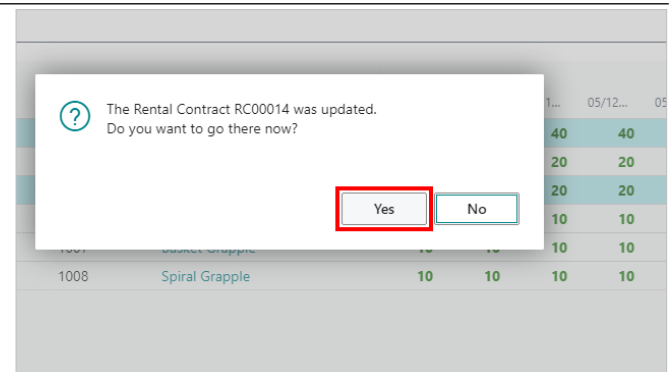
Click on the cell **Code** with the value **EAST**

Quantity Required 2
Rental Terms Code MONTH-PEND-PRO
Location Code
Advanced >
Code Name
CENTRAL Central Warehouse
EAST East Warehouse
RENTRESERV Inventory Items Rental Rese
SOUTH South Warehouse
TEMP Temporary Location
+ New

Click on the button **OK**

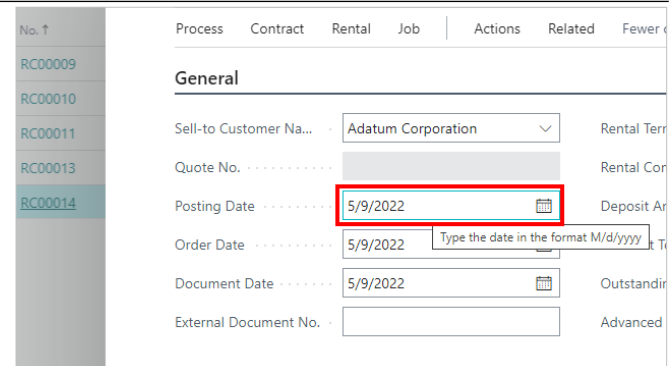


Click on the button **Yes**



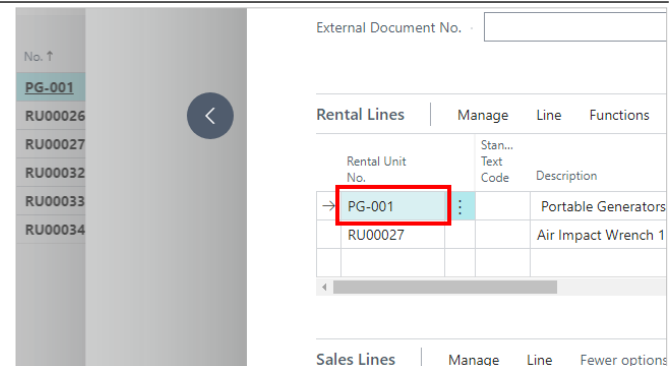
Click on the field **Posting Date**

The Posting Date is populated based on the User Work Date.



Click on the cell **Rental Unit No.** with the value **PG-001**

Note that Rental Lines are created for both of the Rental Units selected on the Rental Inventory Availability records.





Click on the cell **Rental Terms Code** with the value **MONTH-PEND-PRO**

Note that the Rental Terms Code, Rental Quantity and the Location Code on the Rental Lines are populated with the data entered on the Quick Rental Document.

Document No. : Advanced Proforma ☐

Unit	Start... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code
...	:	Portable Generators	MONTH-PEND-PRO	2	EAST	
7	:	Air Impact Wrench 1 inch ...	MONTH-PEND-PRO	2	EAST	

Manage Line Fewer options

Click on the cell **Rental Start Date** with the value **5/9/2022**

Note that the Rental Start Date and Rental Return Date are populated from the dates selected on the Quick Rental Document.

External Document No. : Advanced

Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
→ PG-001	5/9/2022		6/24/2022	500.00
RU00027	5/9/2022	Type the date in the format M/d/yyyy		.00

Sales Lines Manage Line Fewer options

Click on the cell **Rental Unit Price** with the value **500.00**

The Rental Unit Price is populated on all both Rental Lines as the Rental Units have Rental Price cards for the selected Rental Term.

When a Rental Units does not have a Rental Price card, then the Rental Unit Price is set to 0.00 and will need to be entered.

Document No. : Advanced Proforma ☐

Unit	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Co
:	5/9/2022		6/24/2022	500.00	0.00	0.00		SU
7	5/9/2022		6/24/2022	253.00	0.00	0.00		SU

Manage Line Fewer options

3.6. Rental Contracts Using Billing Cycles

3.6.1. Billing Cycle Types Overview

3.6.1.1. Overview

Some organizations have a requirement to have standardized billing cut-off dates for the rental company as a whole or per rental contract.

For customers being billed on a Periodic Start basis, the rental company may choose 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.

For those using Periodic End, the rental company may choose to calculate future invoices at the end of each calendar month.

Other companies may choose 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.

The Billing Cycle Types feature provides the means to meet these requirements.

The Billing Cycle Types include None, End of Month Billing (EOM), First of Month Billing (FOM) and Billing Cycle Date.

- The None option, is the default option that indicates that billing will occur as per the standard rental pricing schemas. Billing will be based on the Invoicing Period Code on the Rental Terms which are on the rental lines.
- The three options of EOM, FOM and Billing Cycle Date are mutually exclusive for invoicing purposes, so only one can be specified on a Rental Quote or Rental Contract.

3.6.1.2. End of Month Billing

The End of Month Billing provides the functionality with Periodic End, Prorated terms to calculate future invoices for billing at the end of each calendar month.

When the product is rented out, and the Rental Billing Start Date on a rental line is within a calendar month, then a partial rental period will be created from the Rental Billing Start Date to the end of the month. For the first invoice the partial rental period rate will be prorated from the Rental Billing Start Date to the end of the month.

All subsequent rental periods invoiced will be from the 1st of the month to the end of the month, with billing to occur on the last day of the calendar month.

To facilitate the proration of partial period calculations and the enforcement of EOM billing, configuration of specific rental terms is required.

The required Rental Term configuration for EOM is covered in, How to Set Up Rental Terms for End of Month Billing.

To learn about entering and processing rentals using the End of Month Billing cycle type, see How to Process Contracts for End of Month Billing.

3.6.1.3. First of Month Billing

The First of Month Billing provides the functionality with Periodic Start, Prorated terms to calculate future invoices for billing at the start of each calendar month.

When the product is rented out, and the Rental Billing Start Date on a rental line is within a calendar month, then a partial rental period will be created from the Rental Billing Start Date to the end of the month. The first invoice billing will occur at the start of the rental, and the rental period rate will be prorated from the Rental Billing Start Date to the end of the month.

All subsequent rental periods will be from the 1st of the month to the end of the month, with billing to occur on the 1st of each calendar month.

To facilitate the proration of partial period calculations and the enforcement of FOM billing, configuration of specific rental terms are required.

The required Rental Term configuration for FOM is covered in, How to Set Up Rental Terms for First of Month Billing.

To learn about entering and processing rentals using the First of Month Billing cycle type, see How to Process Contracts for First of Month Billing.

3.6.1.4. Billing Cycle Date Billing

The Billing Cycle Date type provides the functionality to bill all equipment on rental contract with a consistent cut-off date.

The Rental Terms on the rental lines are restricted to either Periodic Start, Prorated or Periodic End, Prorated terms. This means that there cannot be a mix of Periodic Start and Periodic End terms on the lines.

To learn about setting up Prorated Rental Terms, see the help, How to Set Up Rental Terms for Proration for Partial Periods located in Setup Rentals, Set Up Rental Terms.

The Billing Cycle Date utilizes a Default Invoicing Period Code, which is used to calculate the first Billing Cycle Date on a quote or contract and is used to determine what the next billing date will be when an invoice is posted.

If rental equipment is added after the first invoice has been posted, the billing will be pro-rated to the same Billing Cycle Date used for the original equipment on the recurring invoice. This will occur regardless of whether a weekly, calendar month, or other month length was chosen.

This does not mean everything has to be billed as of a particular date in the month.

NOTE:

However, the Billing Cycle Date Type does contain an additional feature that enables the ability to specify a specific Billing Cycle Day, between 1 and 28, which when configured will set the billing to be on that particular day, each calendar month.

Flexible setup is provided to enable companies to set a default Billing Cycle Type at a company level, Customer level and on the quotes and contracts.

To learn about the setups for Billing Cycle Types, see Setup Billing Cycles.

3.6.2. Setup Billing Cycles

3.6.2.1. Billing Cycles Setup Overview

3.6.2.1.1. Overview

Flexible setup is provided to enable companies to set the Billing Cycle Type for:

- All rentals on the Rental Management Setup
- On a per Customer basis on the Customer cards
- On each Rental Quote or Rental Contract

The setup on Rental Management will default to all quotes and contracts.

Should a Customer card have the Billing Cycle Type setup, then this setup takes priority over the Rental Management Setup, and defaults to the quotes and contracts.

On the Rental Quotes and Rental Contracts, the settings defaulted from either Rental Management Setup or the Customer card, can be modified or cleared, if required.

Should neither Rental Management Setup or the Customer cards be configured with the Billing Cycle Type and details, then the Billing Cycle Type and related details can be specified directly on the quotes and contracts.

3.6.2.1.2. Rental Management Setup

Rental Management Setup has several new fields, which are available when selecting Show more on the General tab.

Billing Cycle Type: The field has four possible options to specify what billing type will be enacted globally on all rental contracts, unless overridden on the Customer card or rental documents.

- **None:** The rental billings on rental contracts will follow normal business rules, unless overridden on the customer card or rental documents.
- **Billing Cycle Date:** Any prorated rental lines on any rental contract will automatically have Billing Cycle Date enacted, unless overridden on the customer card or rental documents.
- **First of Month Billing:** Any prorated rental lines on any rental contract will automatically be invoiced at the beginning of the month, unless overridden on the customer card or rental documents. Use of FOM is subject to restrictions as noted later.
- **End of Month Billing:** Any prorated rental lines on any rental contract will automatically be invoiced at the end of the month unless overridden unless overridden on the customer card or rental documents. Use of



EOM is subject to restrictions as noted later.

Default Invoicing Period Code: If Billing Cycle Date is used, this code will default into the rental document header to be used in calculating the invoice date from the Last Date Invoiced.

Billing Cycle Day: This field can be used to specify a day of the month from 1-28, which allows a company to define a default date of the month that invoicing is to occur on. For example, the 17th. Anyone wanting the end of the month should use the EOM capability as the month-end closing dates vary from month to month. This field is only available if Billing Cycle Date type is selected.

Billing Cycle Tolerance Days: This field can be used to specify a minimum number of days to be included for an invoice to be calculated. The quantity entered would be combined with the Default Billing Period Code on the rental document. This field is only available if Billing Cycle Date type is selected.

To learn about setting up Rental Management Setup for Billing Cycle Types, see How to Set Up Billing Cycle Types on Rental Management Setup and Customers.

3.6.2.1.3. Customer Card Setup

The same fields are also available on the Customer card, Rentals tab, which will default to the rental documents. The Customer setting override the settings on Rental Management Setup.

- Billing Cycle Type
- Default Invoicing Period Code
- Billing Cycle Tolerance Days
- Billing Cycle Day

To learn about setting up a Customer card for Billing Cycle Types, see How to Set Up Billing Cycle Types on Rental Management Setup and Customers.

3.6.2.1.4. Rental Documents

The same setup fields are also available on the rental documents, Invoice Details tab.

- Billing Cycle Type
- Default Invoicing Period Code
- Billing Cycle Tolerance Days
- Billing Cycle Day

The settings on Rental Management and/or a Customer card will default to these fields. However, the defaulted settings can be overridden. And as well, if there are not any defaulted settings, the settings can be done directly on the rental documents.

3.6.2.2. How to Set Up Billing Cycle Types on Rental Mgmt Setup and Customers

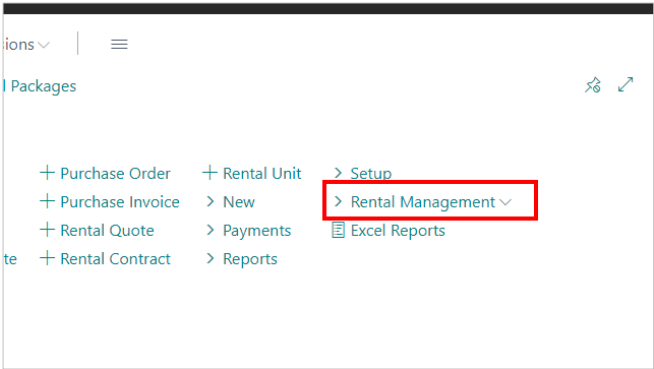
3.6.2.2.1. How to Set Up Billing Cycle Types on Rental Management Setup

3.6.2.2.1.1. How to Setup EOM and FOM Billing Cycle Types

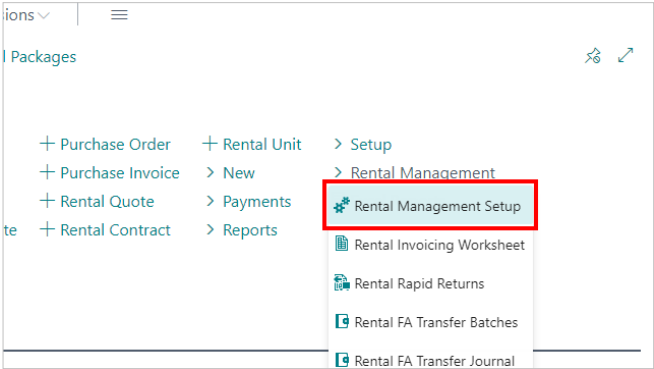
The following example demonstrates the setup of the Billing Cycle Type, End of Month Billing on Rental Management Setup.



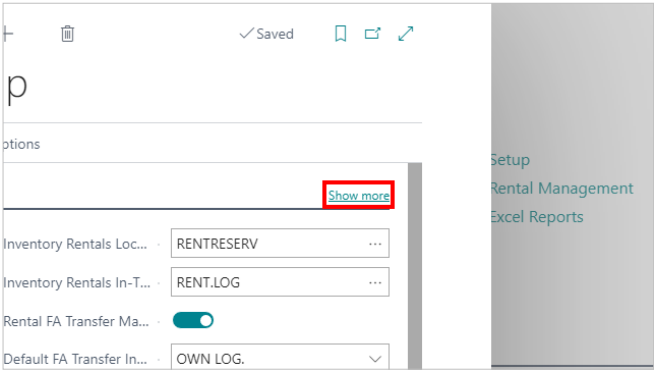
Click on the navigation menu item popup **Rental Management**



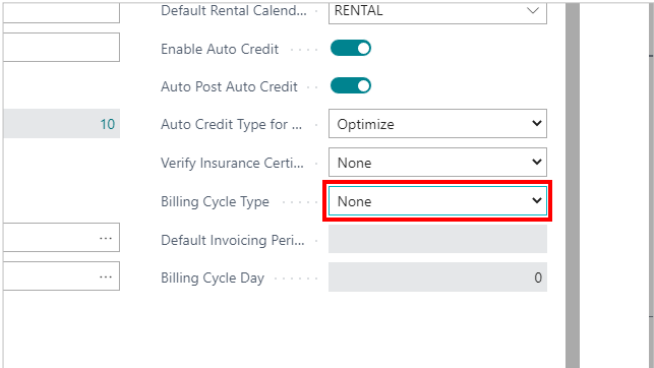
Click on the navigation menu item **Rental Management Setup**



Click on the button **Show more**

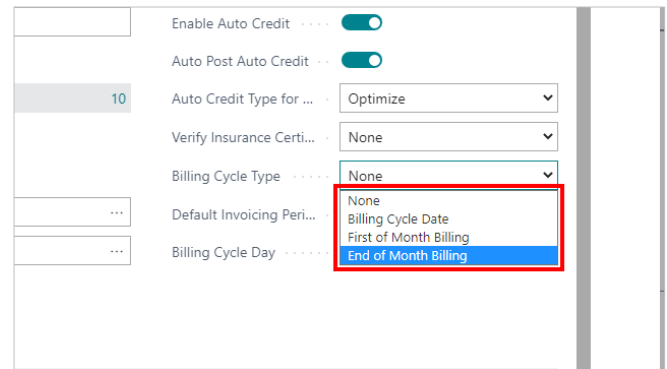


Click on the field **Billing Cycle Type**



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Click on the item **End of Month Billing** in the list
Should the company by default bill at the beginning of each calendar month, then select the option, First of Month Billing.

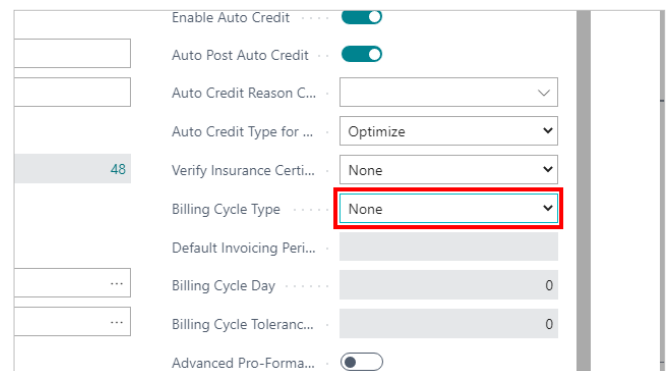


The screenshot shows a dropdown menu for 'Billing Cycle Type'. The options are: None, Billing Cycle Date, First of Month Billing, and End of Month Billing. The 'End of Month Billing' option is highlighted in blue.

3.6.2.2.1.2. How to Set Up Billing Cycle Date Type

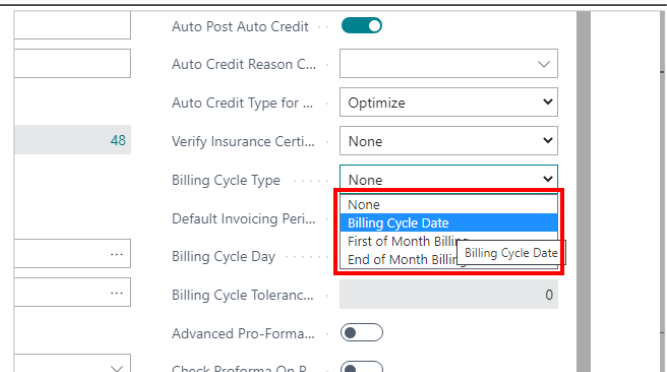
The following example demonstrates the setups for the option Billing Cycle Date.

Click on the field **Billing Cycle Type**



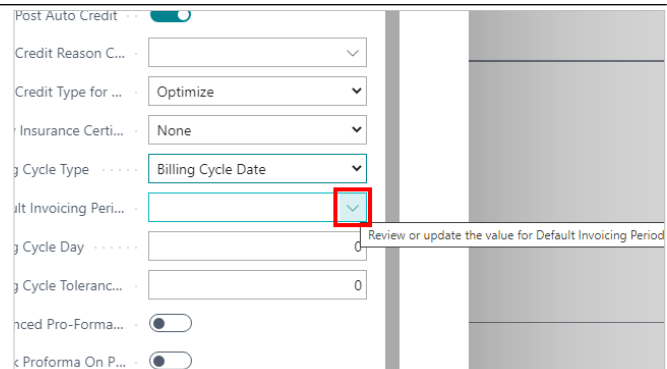
The screenshot shows a dropdown menu for 'Billing Cycle Type'. The options are: None, Billing Cycle Date, First of Month Billing, and End of Month Billing. The 'None' option is highlighted in blue.

Click on the item **Billing Cycle Date** in the list



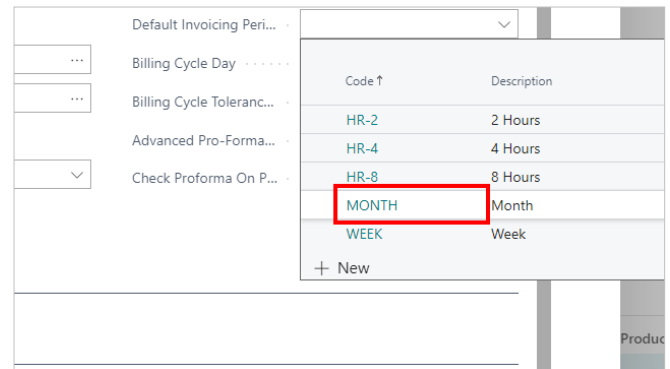
The screenshot shows a dropdown menu for 'Billing Cycle Type'. The options are: None, Billing Cycle Date, First of Month Billing, and End of Month Billing. The 'Billing Cycle Date' option is highlighted in blue.

Click on the lookup button **Default Invoicing Period Code**



The screenshot shows a dropdown menu for 'Default Invoicing Period Code'. The options are: None, Billing Cycle Date, First of Month Billing, and End of Month Billing. The 'Billing Cycle Date' option is highlighted in blue.

Click on the link in cell **Code** with the value **MONTH**
Select the rental invoicing period which is most commonly used.

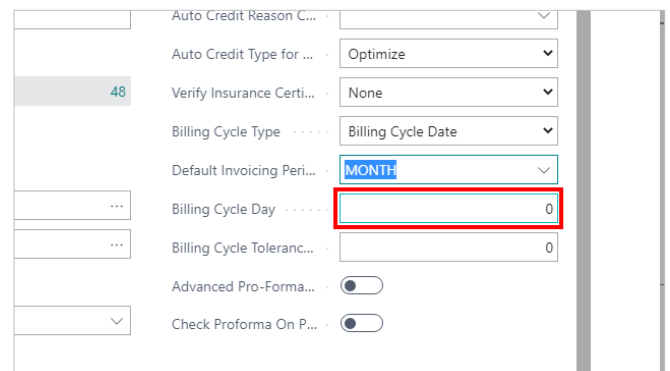


Code	Description
HR-2	2 Hours
HR-4	4 Hours
HR-8	8 Hours
MONTH	Month
WEEK	Week

Note that the Billing Cycle Day and Billing Cycle Tolerance field are only modifiable when the Billing Cycle Type is Billing Cycle Date.

Click on the field **Billing Cycle Day**

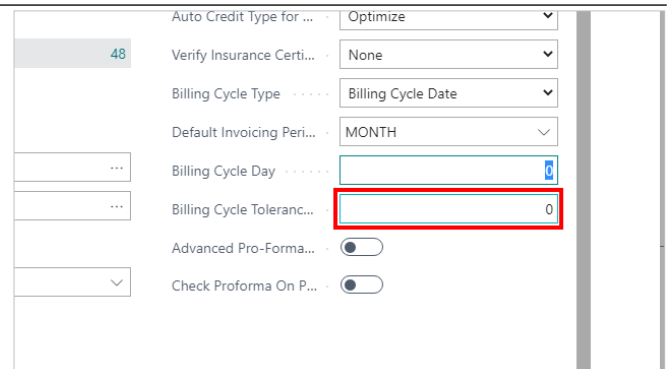
This field should only be populated when an organization does invoice the majority of their customers on a specific day each month, other than the first or last day of a calendar month.



Auto Credit Reason C...
Auto Credit Type for ...
Verify Insurance Certi...
Billing Cycle Type
Default Invoicing Peri...
Billing Cycle Day
Billing Cycle Toleranc...
Advanced Pro-Forma...
Check Proforma On P...

Click on the field **Billing Cycle Tolerance Days**

In this field and organization can specify the minimum number of days to that are to be included when an invoice is calculated.



Auto Credit Type for ...
Verify Insurance Certi...
Billing Cycle Type
Default Invoicing Peri...
Billing Cycle Day
Billing Cycle Tolerance Days
Advanced Pro-Forma...
Check Proforma On P...

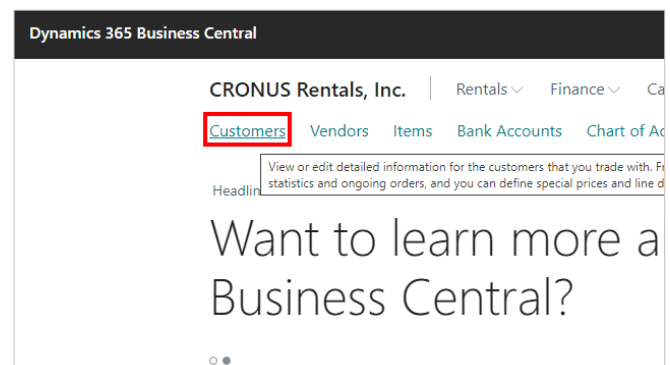
3.6.2.2.2.

How to Set Up Billing Cycle Types on Customer Cards

The following demonstrates setting up the FOM Billing Cycle Type on a Customer card.

When a Customer card has a Billing Cycle Type setup, then when the customer is added to a rental document the settings on the Customer have priority over the setups on Rental Management Setup.

Click on the navigation menu item **Customers**



Dynamics 365 Business Central

CRONUS Rentals, Inc. | Rentals | Finance | Ca

Customers | Vendors | Items | Bank Accounts | Chart of Ac

View or edit detailed information for the customers that you trade with. Fr statistics and ongoing orders, and you can define special prices and line d

Headlin

Want to learn more a Business Central?

Customers Vendors Items Bank Accounts Chart of Accounts Rental Period

Customers: All Search + New Delete Process Report


No. ↑		Name	Responsibility Center
10000	:	Adatum Corporation	
20000	:	Trey Research	
30000		School of Fine Art	
40000		Alpine Ski House	
50000		Relecloud	
C00010		Joe Rental	

No. ↑	Name	Responsibility Center
10000	Adatum Corporation	
20000	Trey Research	
30000	School of Fine Art	
40000	Alpine Ski House	
50000	Relecloud	
C00010	Joe Rental	

Partial

[Show more](#)

No.	Description	Quantity
5		
0		
0		



Sell-to Customer Sales

Customer No.

Ongoing Sales Orders	Ongoing Sales Blanket Orders
1	0

Partial										
Show less										
<table border="1"> <tr> <td>Init Disc. %</td> <td>0</td> </tr> <tr> <td></td> <td>None</td> </tr> <tr> <td>Period Code</td> <td></td> </tr> <tr> <td></td> <td>0</td> </tr> <tr> <td>15</td> <td>No</td> </tr> </table>	Init Disc. %	0		None	Period Code			0	15	No
Init Disc. %	0									
	None									
Period Code										
	0									
15	No									

Partial

Show less

nit Disc. % 0

Period Code None

First of Month Billing

First of Month Billing

No

Customer

Ongoing Quotes

Ongoing Invoices

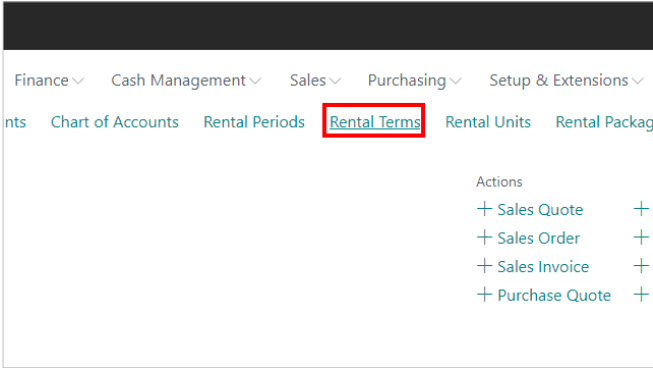


When an organization sets up Rental Prices on rental groups and Rental Units, then once the Rental Terms are setup the Rental Prices will need to be setup.

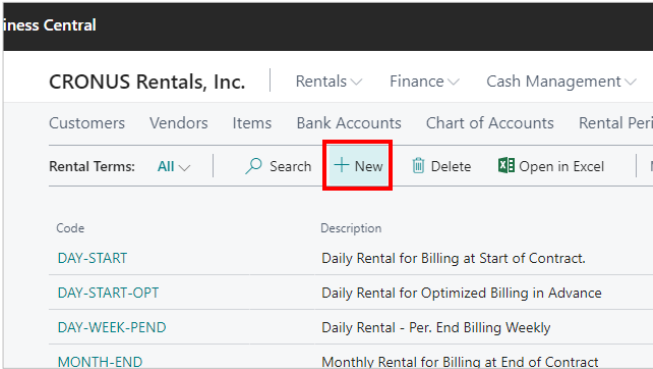
3.6.2.3.2. **Setting up a Monthly Rental Term for EOM Billing**

The following example demonstrates the setting up of a monthly Rental Term for End of Month Billing.

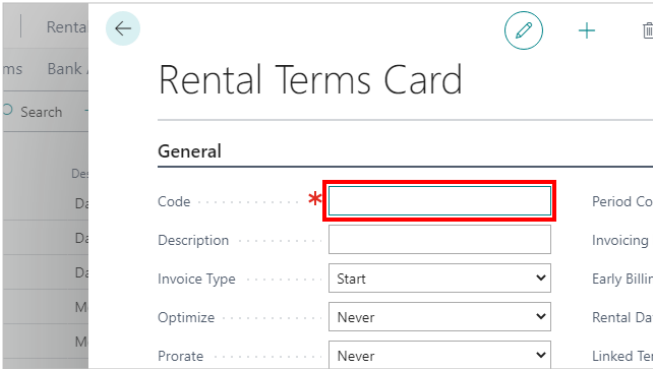
Click on the navigation menu item **Rental Terms**



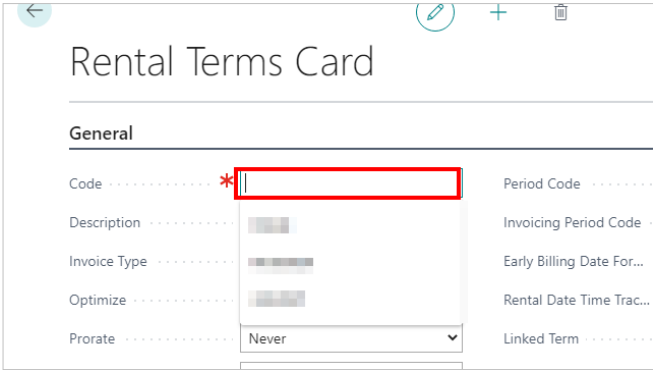
Click on the navigation menu item **New**



Click on the field **Code**



Enter the text **MONTH-PEND-PRO-EOM**.





Click on the field **Description**

ms Bank

Search

De

Da

Da

Da

M

M

M

M

M

Rental Terms Card

General

Code MONTH-PEND-PRO-EOM

Description

Invoice Type Start

Optimize Never

Prorate Never

Rental Terms Code Alt1

Period Co

Invoicing

Early Billin

Rental Da

Linked Ter

Summariz

Enter the text **Monthly Rental - Per. Prorate EOM Billing**.

ms Bank

Search

De

Da

Da

Da

M

M

M

M

M

Rental Terms Card

General

Code MONTH-PEND-PRO-EOM

Description

Invoice Type Start

Optimize Never

Prorate Never

Rental Terms Code Alt1

Period Cod

Invoicing P

Early Billing

Rental Date

Linked Terr

Summarize

Click on the field **Invoice Type**

Search

De

Da

Da

Da

M

M

M

M

M

Rental Terms Card

General

Code MONTH-PEND-PRO-EOM

Description y Rental - Per. Prorate EOM Billing

Invoice Type Start

Optimize Never

Prorate Never

Rental Terms Code Alt1

Rental Terms Code Alt2

Period Co

Invoicing

Early Billin

Rental Da

Linked Ter

Summariz

Click on the item **Periodic End** in the list

Search

De

Da

Da

Da

M

M

M

M

M

Rental Terms Card

General

Code MONTH-PEND-PRO-EOM

Description Monthly Rental - Per. Prorate EOM

Invoice Type Start

Optimize

Prorate

Rental Terms Code Alt1

Rental Terms Code Alt2

Period Co

Invoicing

Early Billin

Rental Da

Linked Ter

Summariz

Start

Periodic Start

Periodic End

End



ODT Rentals Online Help

Click on the field **Prorate**

Code	MONTH-PEND-PRO-EOM	Period Co
Description	Monthly Rental - Per. Prorate EOM	Invoicing
Invoice Type	Periodic End	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Te
Rental Terms Code Alt1	Never	Summariz
Rental Terms Code Alt2		

Click on the item **All Periods** in the list

Code	MONTH-PEND-PRO-EOM	Period Co
Description	Monthly Rental - Per. Prorate EOM	Invoicing
Invoice Type	Periodic End	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Te
Rental Terms Code Alt1	All Periods	Summariz
Rental Terms Code Alt2	All Periods	

Click on the lookup button **Period Code**

Code

ng Period Code

illing Date For...

Date Time Trac...

Term

Track Date Only

Prorate

Never

Never

Never

Never

Never

Click on the link in cell **Code** with the value **MONTH**

Invoicing Period Code	Code ↑	Description
Early Billing Date For...	→ 2HR	2 Hours
Rental Date Time Trac...	4HR	4 Hours
Linked Term	8HR	8 Hours
Summarize Rental Lines	DAY	Daily Rental
Enforce End of Month...	MONTH	Monthly Rental
	+ New	



Click on the field **Invoicing Period Code**
For EOM Billing it is mandatory that the Invoicing
Period Code is a Monthly Period with a Period Length
formula of 1M.

PRO-EOM

Period Code MONTH

Per. Prorate EOM Invoicing Period Code MONTH

Early Billing Date For...

Rental Date Time Trac... Track Date Only

Linked Term

Summarize Rental Lines

Click on the toggle field Enforce End of Month Billing

Per. Prorate EOM

Invoicing Period Code MONTH

Early Billing Date For...

Rental Date Time Trac... Track Date Only

Linked Term

Summarize Rental Lines

Enforce End of Month...

3.6.2.3.3.

Setting up a Weekly Rental Term for EOM Billing

Click on the link **New**

Business Central

CRONUS Rentals, Inc. | Rentals Finance Cash Management

Customers Vendors Items Bank Accounts Chart of Accounts Rental Periods

Rental Terms: All Search + New Delete Open in Excel

Create a new entry.

Code	Description
DAY-START	Daily Rental for Billing at Start of Contract.
DAY-START-OPT	Daily Rental for Optimized Billing in Advance
DAY-WEEK-PEND	Daily Rental - Per. End Billing Weekly
MONTH-END	Monthly Rental for Billing at End of Contract

Click on the field **Code**

Rental Terms Card

General

Code *

Description

Invoice Type Start

Optimize Never

Prorate Never

Period Code

Invoicing

Early Billing

Rental Date

Linked Term



Enter the text **WEEK-PEND-PRO-EOM**.

The screenshot shows the 'Rental Terms Card' form. The 'Code' field is highlighted with a red rectangle and contains an asterisk (*). The 'Description' field is empty. The 'Invoice Type' is set to 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The 'Period Code' is empty. The 'Invoicing' field is empty. The 'Early Billing' field is empty. The 'Rental Date' field is empty. The 'Linked Term' field is empty.

Click on the field **Description**

The screenshot shows the 'Rental Terms Card' form. The 'Code' field contains 'WEEK-PEND-PRO-EOM'. The 'Description' field is highlighted with a red rectangle and is empty. The 'Invoice Type' is set to 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The 'Period Code' is empty. The 'Invoicing' field is empty. The 'Early Billing' field is empty. The 'Rental Date' field is empty. The 'Linked Term' field is empty. The 'Rental Terms Code Alt1' field is empty.

Enter the text **Weekly Rental - Per. Prorate EOM Billing**.

The screenshot shows the 'Rental Terms Card' form. The 'Code' field contains 'WEEK-PEND-PRO-EOM'. The 'Description' field is highlighted with a red rectangle and contains 'W'. The 'Invoice Type' is set to 'Start', 'Optimize' is 'Never', and 'Prorate' is 'Never'. The 'Period Code' is empty. The 'Invoicing' field is empty. The 'Early Billing' field is empty. The 'Rental Date' field is empty. The 'Linked Term' field is empty. The 'Rental Terms Code Alt1' field is empty.

Click on the field **Invoice Type**

The screenshot shows the 'Rental Terms Card' form. The 'Code' field contains 'WEEK-PEND-PRO-EOM'. The 'Description' field contains 'y Rental - Per. Prorate EOM Billing'. The 'Invoice Type' field is highlighted with a red rectangle and is set to 'Start'. The 'Optimize' is 'Never', and 'Prorate' is 'Never'. The 'Period Code' is empty. The 'Invoicing' field is empty. The 'Early Billing' field is empty. The 'Rental Date' field is empty. The 'Linked Term' field is empty. The 'Rental Terms Code Alt1' field is empty. The 'Rental Terms Code Alt2' field is empty.



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Click on the item **Periodic End** in the list

Search

General

Code

WEEK-PEND-PRO-EOM

Period Co

Description

Weekly Rental - Per. Prorate EOM

Invoicing

Invoice Type

Start

Early Billin

Optimize

Start

Periodic Start

Periodic End

End

Rental Da

Prorate

Linked Te

Rental Terms Code Alt1

Summariz

Rental Terms Code Alt2

Click on the field **Prorate**

General

Code

WEEK-PEND-PRO-EOM

Period Co

Description

Weekly Rental - Per. Prorate EOM

Invoicing

Invoice Type

Periodic End

Early Billin

Optimize

Never

Rental Da

Prorate

Never

Linked Te

Rental Terms Code Alt1

Summariz

Rental Terms Code Alt2

Click on the item **All Periods** in the list

General

Code

WEEK-PEND-PRO-EOM

Period Co

Description

Weekly Rental - Per. Prorate EOM

Invoicing

Invoice Type

Periodic End

Early Billin

Optimize

Never

Rental Da

Prorate

Never

Linked Te

Rental Terms Code Alt1

Never

Summariz

Rental Terms Code Alt2

All Periods

Click on the lookup button **Period Code**

Period Code

Invoicing Period Code

Early Billing Date For...

Rental Date Time Trac...

Track Date Only

Linked Term



Click on the link in cell **Code** with the value **WEEK**

Prorate EOM	Invoicing Period Code	Code ↑	Description
▼	Early Billing Date For...	4HR	4 Hours
▼	Rental Date Time Trac...	8HR	8 Hours
▼	Linked Term	DAY	Daily Rental
▼	Summarize Rental Lines	MONTH	Monthly Rental
▼	Enforce End of Month...	WEEK	Weekly Rental
		+ New	

Click on the lookup button **Invoicing Period Code**

Period Code	WEEK	▼
Prorate EOM	Invoicing Period Code	WEEK
▼	Early Billing Date For...	
▼	Rental Date Time Trac...	Track Date Only
▼	Linked Term	
▼	Summarize Rental Lines	☐

Click on the link in cell **Code** with the value **MONTH**
For EOM Billing it is mandatory that the Invoicing Period Code is a Monthly Period with a Period Length formula of 1M.

Period Code	WEEK	▼
Prorate EOM	Invoicing Period Code	WEEK
▼	Early Billing Date For...	
▼	Rental Date Time Trac...	
▼	Linked Term	
▼	Summarize Rental Lines	→ WEEK
▼	Enforce End of Month...	+ New

Click on the toggle field **Enforce End of Month Billing**

Per. Prorate EOM	Invoicing Period Code	MONTH
▼	Early Billing Date For...	
▼	Rental Date Time Trac...	Track Date Only
▼	Linked Term	
▼	Summarize Rental Lines	☐
▼	Enforce End of Month...	☑

3.6.2.4. How to Set Up Rental Terms for First of Month Billing

3.6.2.4.1. Overview

The setup of a Rental Term for processing First of Month Billing has specific settings that must be adhered to.

- Invoicing Type must be Periodic Start
- Prorate must be All Periods
- Invoicing Period Code must be a monthly period with a Period Length formula of 1M.
- Enforce First of Month Billing must be enabled

The Rental Period Code field which is for specifying the rental rate period, can be set to Day, Week, Month, 28



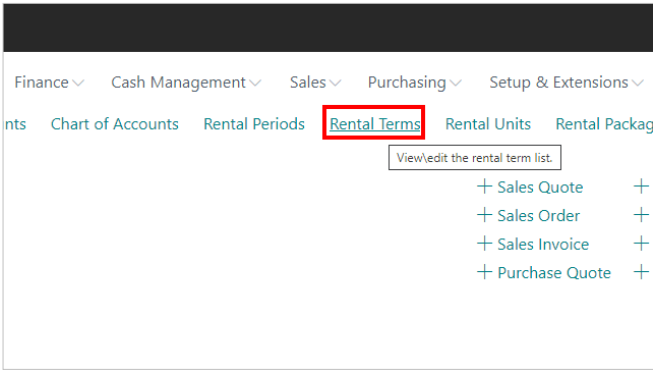
Days, etc.

When an organization sets up Rental Prices on rental groups and Rental Units, then once the Rental Terms are setup the Rental Prices will need to be setup.

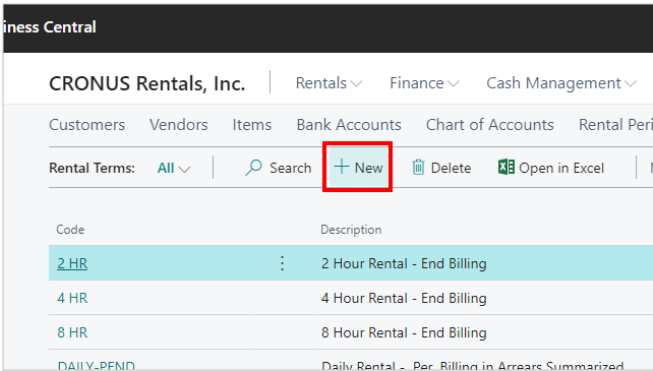
3.6.2.4.2. **Setting up a Monthly Rental Term for FOM Billing**

The following example demonstrates the setting up of a monthly Rental Term for First of Month Billing.

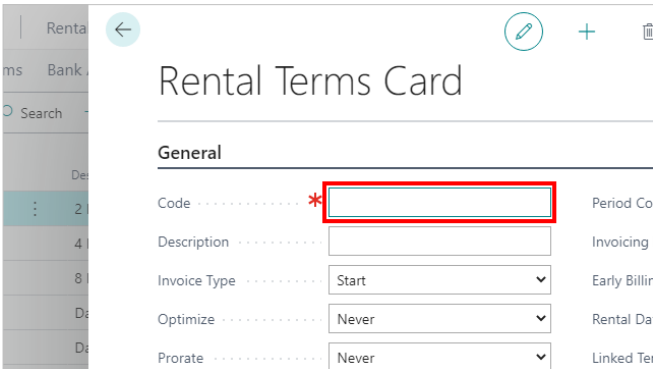
Click on the navigation menu item **Rental Terms**



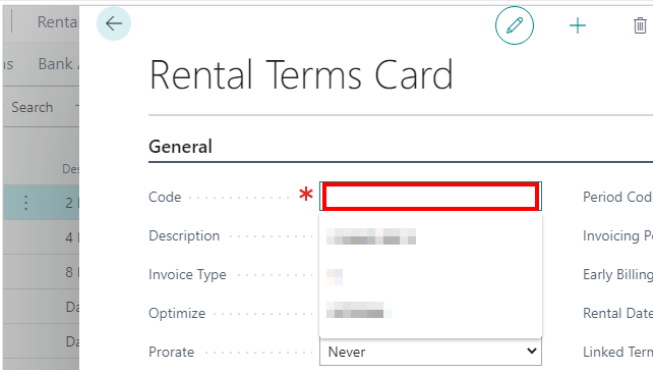
Click on the link **New**



Click on the field **Code**



Enter the text **MONTH-PSTART-PRO-FOM**.





Click on the field **Description**

The screenshot shows the 'Rental Terms Card' form. The 'General' section contains the following fields: Code (MONTH-PSTART-PRO-FOM), Description (highlighted with a red box), Invoice Type (Start), Optimize (Never), Prorate (Never), and Rental Terms Code Alt1. The right side of the form shows labels for Period Co, Invoicing, Early Billin, Rental Da, Linked Ter, and Summariz.

Enter the text **Monthly Rental - Per. Prorate FOM Billing.**

The screenshot shows the 'Rental Terms Card' form. The 'Description' field now contains the text 'Monthly Rental - Per. Prorate FOM Billing' and is highlighted with a red box. The other fields remain the same as in the previous screenshot.

Click on the field **Invoice Type**

The screenshot shows the 'Rental Terms Card' form. The 'Invoice Type' field is highlighted with a red box and shows a dropdown menu with 'Start' selected. The 'Description' field still contains the text 'Monthly Rental - Per. Prorate FOM Billing'.

Click on the item **Periodic Start** in the list

The screenshot shows the 'Rental Terms Card' form. The 'Invoice Type' dropdown menu is open, showing options: Start, Periodic Start (highlighted with a blue bar and a red box), and Periodic Start. The 'Description' field still contains the text 'Monthly Rental - Per. Prorate FOM Billing'.



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Click on the field **Prorate**

Code	MONTH-START-PRO-FOM	Period Co
Description	Monthly Rental - Per. Prorate FOM	Invoicing
Invoice Type	Periodic Start	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Te
Rental Terms Code Alt1	Never	Summariz
Rental Terms Code Alt2		

Click on the item **All Periods** in the list

Code	MONTH-START-PRO-FOM	Period Co
Description	Monthly Rental - Per. Prorate FOM	Invoicing
Invoice Type	Periodic Start	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Te
Rental Terms Code Alt1	All Periods	Summariz
Rental Terms Code Alt2	All Periods	

Click on the lookup button **Period Code**

Code	
ing Period Code	
illing Date For...	
Date Time Trac...	Track Date Only
Term	

Click on the link in cell **Code** with the value **MONTH**

Invoicing Period Code	Code ↑	Description
Early Billing Date For...	→ 2HR	2 Hours
Rental Date Time Trac...	4HR	4 Hours
Linked Term	8HR	8 Hours
Summarize Rental Lines	DAY	Daily Rental
Enforce First of Mont...	MONTH	Monthly Rental
	+ New	



Click on the field **Invoicing Period Code**
For FOM Billing it is mandatory that the Invoicing
Period Code is a Monthly Period with a Period Length
formula of 1M.

Click on the toggle field Enforce First of Month Billing

3.6.2.4.3. How to Set Up a Weekly Rental Term for FOM Billing
The following example demonstrates the setting up of a weekly Rental Term for First of Month Billing.

Click on the navigation menu item **New**

Click on the field **Code**



Enter the text **WEEK-PSTART-PRO-FOM**.

The screenshot shows the 'Rental Terms Card' form. The 'Code' field is highlighted with a red rectangle and contains the text 'WEEK-PSTART-PRO-FOM'. Other fields like 'Description', 'Invoice Type', 'Optimize', and 'Prorate' are visible but not highlighted.

Click on the field **Description**

The screenshot shows the 'Rental Terms Card' form. The 'Description' field is highlighted with a red rectangle and is empty. The 'Code' field now contains 'WEEK-PSTART-PRO-FOM'.

Enter the text **Weekly Rental - Per. Prorate FOM Billing**.

The screenshot shows the 'Rental Terms Card' form. The 'Description' field is highlighted with a red rectangle and contains the text 'Weekly Rental - Per. Prorate FOM Billing'. The 'Code' field still contains 'WEEK-PSTART-PRO-FOM'.

Click on the field **Invoice Type**

The screenshot shows the 'Rental Terms Card' form. The 'Invoice Type' dropdown menu is highlighted with a red rectangle and shows 'Start' as the selected option. The 'Description' field contains 'Weekly Rental - Per. Prorate FOM Billing'.

Click on the item **Periodic Start** in the list

General

Code	WEEK-PSTART-PRO-FOM	Period Co
Description	Weekly Rental - Per. Prorate FOM	Invoicing
Invoice Type	Start	Early Billin
Optimize	Periodic Start	Rental Da
Prorate	Periodic Start	Linked Ter
Rental Terms Code Alt1		Summariz
Rental Terms Code Alt2		

Click on the field **Prorate**

Code	WEEK-PSTART-PRO-FOM	Period Co
Description	Weekly Rental - Per. Prorate FOM	Invoicing
Invoice Type	Periodic Start	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Ter
Rental Terms Code Alt1		Summariz
Rental Terms Code Alt2		

Click on the item **All Periods** in the list

Code	WEEK-PSTART-PRO-FOM	Period Co
Description	Weekly Rental - Per. Prorate FOM	Invoicing
Invoice Type	Periodic Start	Early Billin
Optimize	Never	Rental Da
Prorate	Never	Linked Te
Rental Terms Code Alt1	All Periods	Summariz
Rental Terms Code Alt2	All Periods	

Click on the lookup button **Period Code**

The screenshot shows the 'New Contract' form in the 'Contract' tab. The 'Code' field is highlighted with a red box, and a dropdown menu is open showing options: Prorate, Never (selected), Never, Never, Never, and Never.

Click on the link in cell **Code** with the value **WEEK**

Code ↑	Description
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	

Click on the lookup button **Invoicing Period Code**

Code	Description
WEEK	Weekly Rental
MONTH	Monthly Rental
DAY	Daily Rental
4HR	4 Hours
8HR	8 Hours
+ New	

Click on the link in cell **Code** with the value **MONTH**
For FOM Billing it is mandatory that the Invoicing Period Code is a Monthly Period with a Period Length formula of 1M.

Code	Description
WEEK	Weekly Rental
MONTH	Monthly Rental
DAY	Daily Rental
4HR	4 Hours
8HR	8 Hours
+ New	

Click on the toggle field **Enforce First of Month Billing**

Code	Description
WEEK	Weekly Rental
MONTH	Monthly Rental
DAY	Daily Rental
4HR	4 Hours
8HR	8 Hours
+ New	

3.6.3. Processing Contracts with Billing Cycle Types

3.6.3.1. How to Process Contracts for End of Month Billing

3.6.3.1.1. Processing EOM Billing with Rental Management Setup

Defined

The following example will be based on Rental Management Setup having the Billing Cycle Type set to End of Month Billing and the Customer will have a Billing Cycle Type of None.



ODT Rentals Online Help

The contract will contain a group line with a monthly EOM rental term with the same start date and return date.

Click on the navigation menu item **Rental Contract**

ons Intelligent Cloud Insights

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	Exc

Click on the lookup button **Sell-to Customer Name**

Review or update the value for Sell-to Customer Name

Contract Total

Outstanding Amount

Advanced Proforma

Click on the link in cell **No.** with the value **10000**

No. ↑	Name	ZIP
10000	Adatum Corporation	31
20000	Select record "10000"	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New

Click on the field **Billing Cycle Type**

On the Invoicing Details tab, note that the Billing Cycle Type, End of Month Billing from the Rental Management Setup as the Customer did not have a Billing Cycle Type defined.

End of Month Billing



Click on the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→				0	

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→				0	

Adatum Corporation
sales inv

Sales Lines >

Click on the link in cell **No.** with the value **RU00011**

RU00010	Framing Air Nailer Group	<input checked="" type="checkbox"/>
RU00010-001	Framing Air Nailer	<input type="checkbox"/>
RU00010-002	Framing Air Nailer	<input type="checkbox"/>
RU00010-003	Framing Air Nailer	<input type="checkbox"/>
RU00010-004	Framing Air Nailer	<input type="checkbox"/>
RU00010-005	Framing Air Nailer	<input type="checkbox"/>
RU00011	Power Shovel Group	<input checked="" type="checkbox"/>
RU00011-001	Power Shovel	<input type="checkbox"/>
RU00011-002	Power Shovel	<input type="checkbox"/>
RU00011-003	Power Shovel	<input type="checkbox"/>
RU00011-004	Power Shovel	<input type="checkbox"/>
RU00011-005	Power Shovel	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code Rental Terms Code Alt1
RU00011		Power Shovel Group	MONTH-PEND	0	

Lines >



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Terms Code**

No.

Manage	Line	Functions	Related	Fewer options		
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
...	Power Shovel Group	MONTH-P	0			
Review or update the value for Rental Terms Code						

Click on the link in cell **Code** with the value **MONTH-PEND-PRO-EOM**

Code	Description
→ MONTH-PEND	Monthly Re
MONTH-PEND EARLY	Monthly Re
MONTH-PEND-OPT	Monthly Re
MONTH-PEND-PRO	Monthly Re
MONTH-PEND-PRO-EOM	Monthly Re
+ New	

Details

Code 10000

Click on the cell **Rental Quantity** with the value **0**

.....

Manage	Line	Functions	Related	Fewer options		
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Power Shovel Group	-PRO-EOM	0			

Enter the text **2**.

.....

Manage	Line	Functions	Related	Fewer options		
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Power Shovel Group	MONTH-PEN...				



Click on the cell **Location Code**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Power Shovel Group	MONTH-PEN...	2				4/12/2021

Click on the link in cell **Code** with the value **EAST**

Location Code	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods
Power Shovel Group	MONTH-PEN...	2				4/12/2021	
Power Shovel Gro...	MONTH-PEN...	1					
Power Shovel Gro...	MONTH-PEN...	1					
			Code ↑	Name			
			→ CENTRAL	Central Warehouse			
			EAST	East Warehouse			
			RENTRESERV	Inventory Items Rental Rese			
			SOUTH	South Warehouse			
			TEMP	Temporary Location			
			WEST	West Warehouse			
			+ New				

Click on the cell **No. of Periods**

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price
AST			4/12/2021		5/11/2021	9,000.00	0.00
AST			4/12/2021		5/11/2021	9,000.00	0.00
AST			4/12/2021		5/11/2021	9,000.00	0.00

Enter the text **2**.

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price
AST			4/12/2021		5/11/2021	9,000.00	0.00
AST			4/12/2021		5/11/2021	9,000.00	0.00
AST			4/12/2021		5/11/2021	9,000.00	0.00



Click on the cell **Rental Return Date** with the value **6/11/2021**

By entering 2 in the No. of Periods field, the Rental Return Date is calculated and populated for 2 rental periods.

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		5/11/2021	9,000.00	0.00	0.00
		4/12/2021		6/11/2021	9,000.00	0.00	0.00
		4/12/2021		6/11/2021	9,000.00	0.00	0.00

Click on the cell **Rental Unit No.**

External Document No.

Rental Lines

Manage

Line

Functions

Related

Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity
→ RU00011	:	Power Shovel Group	MONTH-PEN...	2
	:	Power Shovel Gro...	MONTH-PEN...	1
	:	Power Shovel Gro...	MONTH-PEN...	1

Sales Lines >

Click on the link in cell **No.** with the value **RU00011-003**

Rental Contract | Work Date: 4/12/2021					
Rental Unit List					
Search	Rental	Open in Excel	Related	Fewer options	Show as me
No. ↑	Description	Group ↑			
→ RU00011-003	Power Shovel				

Click on the cell **Rental Unit No.**

Rental Lines						Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity						
RU00011		Power Shovel Group	MONTH-PEN...	2						
→ RU00011-C ...	:	Power Shovel	MONTH-PEN...	1						
	:	Power Shovel Gro...	MONTH-PEN...	1						
<div><</div>										

Sales Lines >



Click on the lookup button in the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
RU00011		Power Shovel Group	MONTH-PEN...	2	
RU00011-003		Power Shovel	MONTH-PEN...	1	
→ [lookup button]		Power Shovel Gro...	MONTH-PEN...	1	

Sales Lines >

Click on the link in cell **No.** with the value **RU00011-001**

Rental Contract | Work Date: 4/12/2021			
Rental Unit List			
Search	Rental	Open in Excel	Related Fewer options Show as me
No. ↑	Description	Group ↑	
→ RU00011-001	Power Shovel		
RU00011-002	Power Shovel		
RU00011-003	Power Shovel		

Click on **Rental Unit No. = RU00011-003**, **Rental Terms Code = MONTH-PEND-PRO-EOM**, **Rental Quantity = 1**

External Document No.					
Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
RU00011		Power Shovel Group	MONTH-PEN...	2	
RU00011-003		Power Shovel	MONTH-PEN...	1	
→ [lookup button]		Power Shovel	MONTH-PEN...	1	

Sales Lines >

Click on the navigation menu item popup **Line**

Posting Date	4/12/2021
Order Date	4/12/2021
Document Date	4/12/2021
External Document No.	

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
RU00011		Power Shovel Group	MONTH-PEN...	2	
→ RU00011-003		Power Shovel	MONTH-PEN...	1	
RU00011-001		Power Shovel	MONTH-PEN...	1	



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/12/2021
Document Date 4/12/2021
External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Amount Lines | Rental Value Entries | Metered Usage Entries
Rental Ledger Entries | View Rental Calendar | Periodic Usage Entries

→ RU00011-003	:		Power Shovel	MONTH-PEN...	1
RU00011-001	:		Power Shovel	MONTH-PEN...	1

Click on the cell **Ending Date-Time** with the value **4/30/2021 11:59 PM**

As the Rental Term on the Rental Line has the field, Enforce End of Month Billing enabled, the Ending Date-Time is automatically calculated and set to the last day in the calendar month or the last billable day as on the last line.

Rental Contract | Work Date: 4/12/2021

View - Rental Line Rental Amounts

Search Open in Excel

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit P
Rental	4/12/2021 12:00 AM	4/30/2021 11:59 PM	0.63333	
Rental	5/1/2021 12:00 AM	5/31/2021 11:59 PM	1	
Rental	6/1/2021 12:00 AM	6/11/2021 11:59 PM	0.36667	

Click on the cell **Extended Quantity** with the value **0.63333**

The proration of the partial period calculated the extended quantity based on 19 days (April 12 - April 30) being billable for the first invoice. The calculation is $19/30 = 0.63333$.

Work Date: 4/12/2021

View Rental Amounts

Open in Excel

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amo
4/12/2021 12:00 AM	4/30/2021 11:59 PM	0.63333	9,000.00	5
5/1/2021 12:00 AM	5/31/2021 11:59 PM	1	9,000.00	9
6/1/2021 12:00 AM	6/11/2021 11:59 PM	0.36667	9,000.00	3

Click on the cell **Billing Date** with the value **4/30/2021**

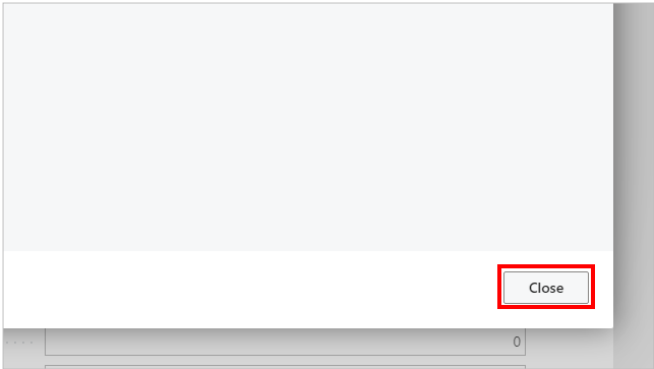
Note that on the first 2 Rental Amount lines the Billing Date is set to the last day of the applicable calendar month.

The last line Billing Date reflects the Rental Return Date or Rental End Billing Date when Return Day Billable is enabled.

✓ Saved

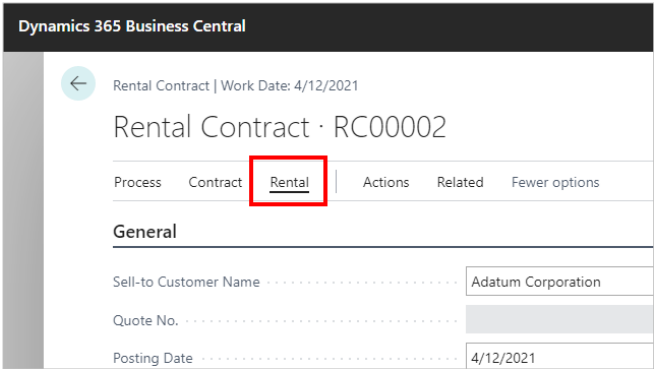
Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑	Billed	Invoice No.
SUPPLIES	ATLANTA, GA	✓	4/30/2021	<input type="checkbox"/>	
SUPPLIES	ATLANTA, GA	✓	5/31/2021	<input type="checkbox"/>	
SUPPLIES	ATLANTA, GA	✓	6/11/2021	<input type="checkbox"/>	

Click on the button **Close**

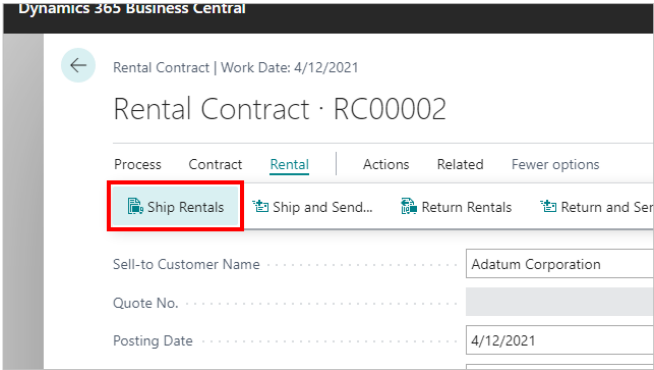


The processing of the shipment, recurring invoicing and return of the units is the same as processing any contracts.
The following steps demonstrate the processing of the contract.

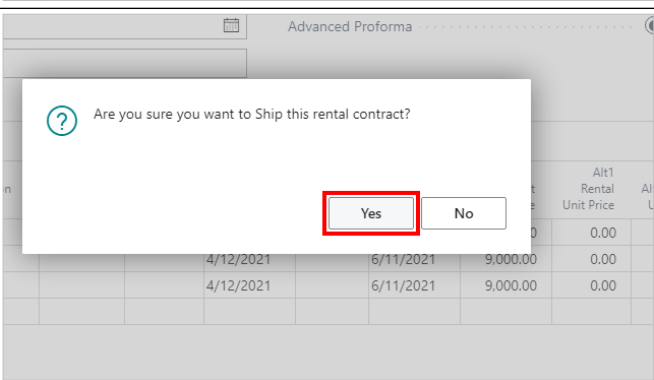
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**





Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

				Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cur Cod
				0.00	0.00	
4/12/2021		6/11/2021	9,000.00	0.00	0.00	
4/12/2021		6/11/2021	9,000.00	0.00	0.00	

Click on the link **Open the date picker for Posting Date**

ns

on

Rental Terms Code

Deposit Amount

Contract Total

Open the date picker for Posting Date

Advanced Proforma

Click on a date in the calendar

Select the billing date related to the first invoice to be posted.

4/12/2021

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Go to today Done

Line	Functions	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental S Date
		Power Shovel Group	MONTH-PEN...	2	EAST			4/12/20
		Power Shovel	MONTH-PEN...	1	EAST			4/12/20
		Power Shovel	MONTH-PEN...	1	EAST			4/12/20

The Proforma Invoice can be viewed, email or printed by selecting Process - Print Profoma Invoice.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00002

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/30/2021



Click on the link **Invoice**

The screenshot shows the top navigation bar of the ODT Rentals Online Help interface. The 'Invoice' link is highlighted with a red box. Other links visible include 'Return and Send...', 'Bulk Returns', 'Invoice and Print', and 'Invoice'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text "Are you sure you want to Invoice this rental contract?". The 'Yes' button is highlighted with a red box. The background shows a table with columns for dates and unit prices.

Click on the button **OK**

The screenshot shows a success message dialog box with the text "Invoice Posted Successfully.". The 'OK' button is highlighted with a red box. The background shows a table with columns for dates and unit prices.

Click on the link **Open the date picker for Posting Date**

The screenshot shows the bottom section of the ODT Rentals Online Help interface. The 'Open the date picker for Posting Date' link is highlighted with a red box. Other links visible include 'Rental Terms Code', 'Deposit Amount', 'Contract Total', 'Outstanding Amount', and 'Advanced Proforma'.



Click on the link **Next**

Adatum Corporation

4/30/2021

April 2021

Su Mo Tu We Th Fr Sa

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Functions

Click on a date in the calendar

Select the billing date related to the second invoice to be posted.

4/30/2021

May 2021

Su Mo Tu We Th Fr Sa

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

Go to today Done

Unit	Stan... Text Code	Description	Rental terms Code	Quantity	Location Code	Rental Terms Code Alt1
011		Power Shovel Group	MONTH-PEN...	2	EAST	
011-003		Power Shovel	MONTH-PEN...	1	EAST	
011-001		Power Shovel	MONTH-PEN...	1	EAST	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC000002

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/31/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Adatum Corporation

Rental Terms Code

Deposit Amount

Contract Total



Click on the button **Yes**

The screenshot shows a window titled "Advanced Proforma" with a table of rental data. Overlaid on this is a white dialog box with a question mark icon and the text "Are you sure you want to Invoice this rental contract?". At the bottom right of the dialog box are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red rectangular box.

Click on the button **OK**

The screenshot shows the same "Advanced Proforma" window. A white dialog box is now displayed with the message "Invoice Posted Successfully.". At the bottom right of the dialog box is a single button labeled "OK", which is highlighted with a red rectangular box.

Click on the link **Open the date picker for Posting Date**

The screenshot shows the "Advanced Proforma" form. On the left side, there is a section for "Posting Date" with a text input field and a calendar icon to its right. The calendar icon is highlighted with a red rectangular box. To the right of this section are several other fields: "Rental Terms Code", "Deposit Amount", "Contract Total", "Outstanding Amount", and "Advanced Proforma".

Click on the link **Next**

The screenshot shows the "Advanced Proforma" form with the date picker calendar open. The calendar is for May 2021, showing days from 1 to 31. The date 5/31/2021 is selected and highlighted in blue. A red rectangular box highlights the "Next" button, which is a blue triangle pointing to the right, located at the bottom right of the calendar.



Click on a date in the calendar

Select the billing date related to the final invoice to be posted which is a partial period.

Line	Functions
	Go to today Done

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental S Date
-------------	-------------------	-----------------	---------------	------------------------	------------------------	---------------

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00002

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/11/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Adatum Corporation Rental Terms Code

1/2021 Deposit Amount

Contract Total

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

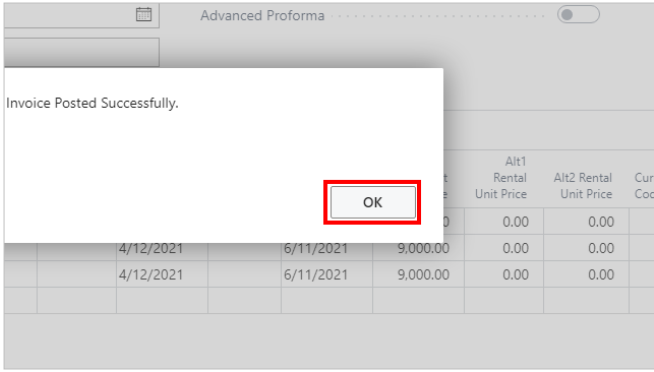
Yes No

	Alt1 Rental Unit Price	Alt1
4/12/2021	9,000.00	0.00
4/12/2021	9,000.00	0.00

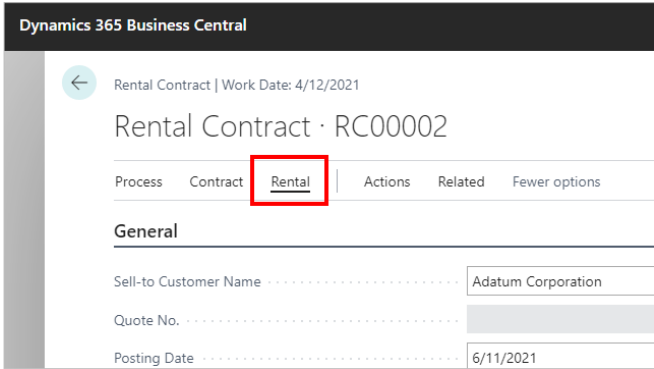


ODT Rentals Online Help

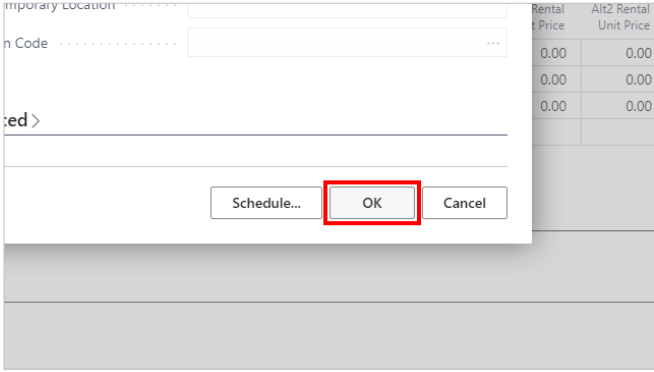
Click on the button **OK**



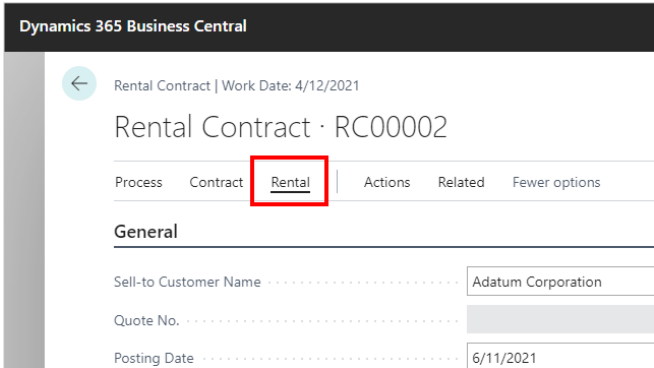
Click on the navigation menu item popup **Rental**



Click on the button **OK**

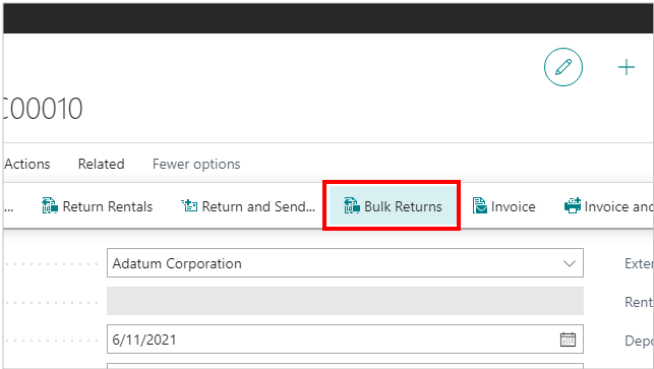


Click on the navigation menu item popup **Rental**

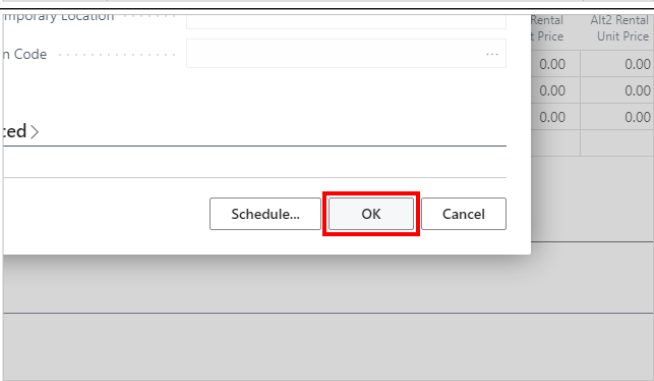




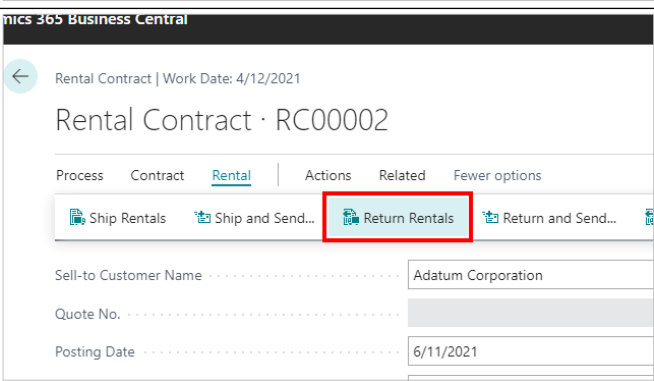
Click on the navigation menu item **Bulk Returns**



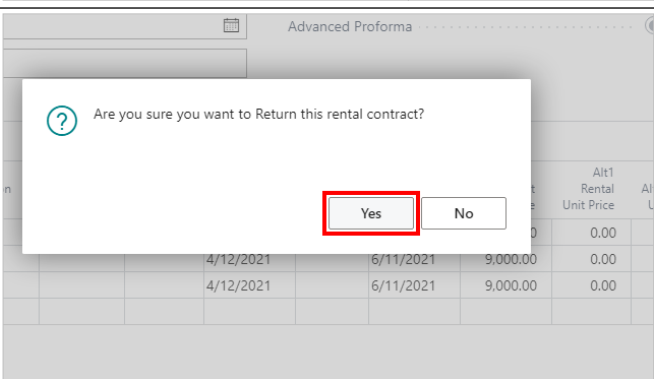
Click on the button **OK**



Click on the navigation menu item **Return Rentals**

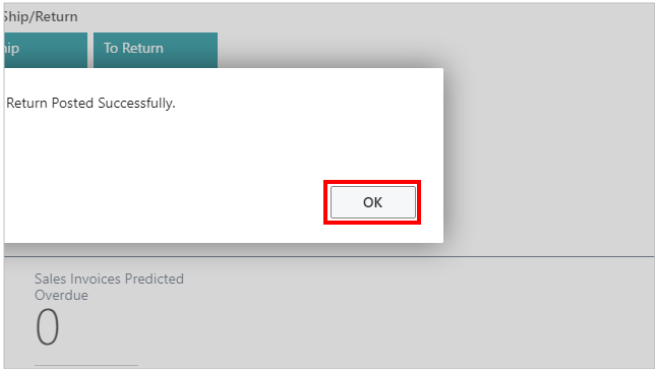


Click on the button **Yes**





Click on the button **OK**



3.6.3.1.2. Processing EOM Billing with Various Rental Terms

The following example will be based on Rental Management Setup having the Billing Cycle Type set to End of Month Billing and the Customer will have a Billing Cycle Type of None.

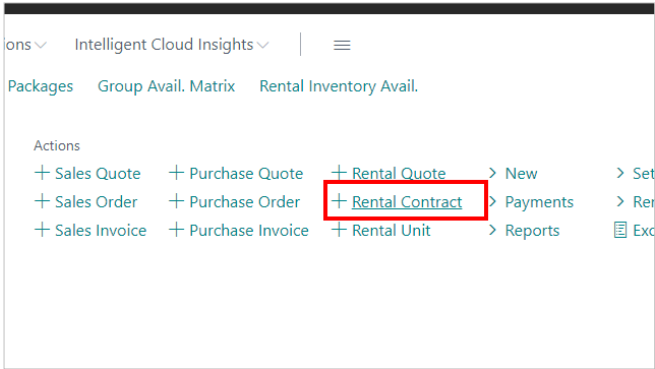
This example is for demonstrating the impact:

- On the billing dates for an EOM term that has a weekly rental rate.
- When a Rental Line has a Monthly Periodic End, Rental Term which is neither prorated or and EOM term.

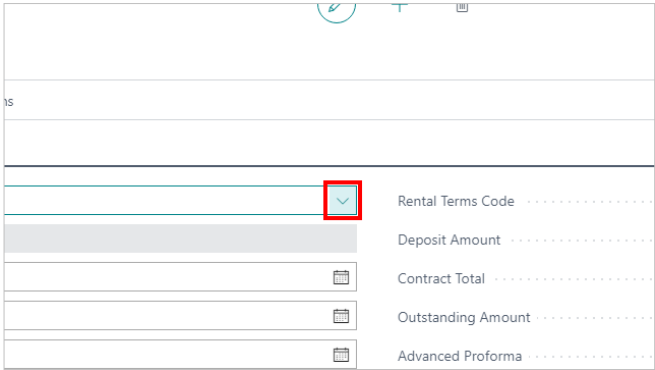
The contract will contain multiple Rental Lines with allowed Rental Terms and all lines will have a Rental Start Date of April 12 and a Rental Return Date of May 31.

1. A rental unit with a weekly EOM rental term.
2. A group line with a monthly EOM rental term.
3. A rental unit with a monthly periodic end rental term.

Click on the navigation menu item **Rental Contract**



Click on the lookup button **Sell-to Customer Name**





Click on the link in cell **No.** with the value **10000**

Contract	Rental	Actions	Related	Fewer options
al				
Customer Name				
o.				
Date	No. ↑	Name	ZIP	
ate	→ 10000	Adatum Corporation	31	
nt Date	200	Select record "10000"	Irch	61
Document No.	30000	School of Fine Art	37	
	40000	Alpine Ski House	31	
	50000	Relecloud	31	
+ New				

Click on the cell **Rental Unit No.**

External Document No.					
Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→				0	
Sales Lines >					

Click on the field **Billing Cycle Type**

Note that the Billing Cycle Type, End of Month Billing, defaulted from the setting on Rental Management Setup.

Rental Package Disc. %	
FA Rental Unit Disc. %	
Item Rental Unit Disc. %	
Resource Rental Unit Disc. %	
G/L Acct Rental Unit Disc. %	
Billing Cycle Type	End of Month Billing
Default Invoicing Period Code	
Billing Cycle Day	
Billing Tolerance Days	

Click on the lookup button in the cell **Rental Unit No.**

External Document No.					
Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→				0	
Review or update the value for Rental Unit No.					
Sales Lines >					



ODT Rentals Online Help

Click on the link in cell **No.** with the value **PG-001**

No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00001	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-END**

Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
PG-001	...	Portable Generators	MONTH-END	0		

Click on the lookup button in the cell **Rental Terms Code**

Manage	Line	Functions	Related	Fewer options
...	MONTH-END	0

Click on the link in cell **Code** with the value **WEEK-PEND-PRO-EOM**

Code	Description
WEEK-END-OPT-TIME	Weekly Ren
WEEK-PEND	Weekly Ren
WEEK-PEND-OPT	Weekly Ren
WEEK-PEND-PRO	Weekly Ren
WEEK-PEND-PRO-EOM	Weekly Ren



ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Manage Line Functions Related Fewer options						
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Portable Generators	-PRO-EOM	0			

Enter the text **1**.

Manage Line Functions Related Fewer options						
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Portable Generators	WEEK-PEND-...	<div>1</div>			

Click on the cell **Location Code**

<div>.....</div> <div></div>						
Line Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Portable Generators	WEEK-PEND-...	1				4/12/2021
<div></div>						
<div></div>						

Click on the link in cell **Code** with the value **EAST**

Location	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. Period
Portable Generators	WEEK-PEND-...	1				4/12/2021	
			10/4/2020				
			→ CENTRAL	Central Warehouse			
			EAST	East Warehouse			
			RENTRESERV	Inventory Items Rental Rese			
			SOUTH	South Warehouse			
			TEMP	Temporary Location			
			+ New				



ODT Rentals Online Help

Click on the cell **Rental Return Date** with the value **4/18/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		4/18/2021	150.00	0.00	0.0
Type the date in the format M/d/yyyy							

Click on the link in cell **Rental Return Date** with the value **4/18/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		4/18/2021	150.00	0.00	0.0
Open the date picker for Rental Return Date							

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent																																										
2021		4/18/2021	150.00	0.00	0.00		SUPPLIES	1																																										
<div><div>◀ April 2021 ▶</div><table><tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr><tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr><tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr><tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr><tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr><tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td></tr></table></div>									Su	Mo	Tu	We	Th	Fr	Sa					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
Su	Mo	Tu	We	Th	Fr	Sa																																												
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4	5	6	7	8	9	10																																												
11	12	13	14	15	16	17																																												
18	19	20	21	22	23	24																																												
25	26	27	28	29	30																																													

Click on a date in the calendar

Select May 31.

		4/12/2021		4/18/2021	150.00	0.00	0.00
<div><div><div>◀</div><div>May 2021</div><div>▶</div></div><div><div>Su</div><div>Mo</div><div>Tu</div><div>We</div><div>Th</div><div>Fr</div><div>Sa</div></div><div><div>1</div><div>2</div><div>3</div><div>4</div><div>5</div><div>6</div><div>7</div><div>8</div><div>9</div><div>10</div><div>11</div><div>12</div><div>13</div><div>14</div><div>15</div><div>16</div><div>17</div><div>18</div><div>19</div><div>20</div><div>21</div><div>22</div><div>23</div><div>24</div><div>25</div><div>26</div><div>27</div><div>28</div><div>29</div><div>30</div><div>31</div></div><div><div>Go to today</div><div>Done</div></div></div>							
Payment Method Code							BANK



Click on the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→ PG-001	:	Portable Generators	WEEK-PEND-...	1	

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
→ PG-001	:	Portable Generators	WEEK-PEND-...	1	

Review or update the value for Rental Unit No.

Sales Lines >

Click on the link in cell **No.** with the value **RU00011**

RU00010	:	Framing Air Nailer Group	<input checked="" type="checkbox"/>
RU00010-001		Framing Air Nailer	<input type="checkbox"/>
RU00010-002		Framing Air Nailer	<input type="checkbox"/>
RU00010-003		Framing Air Nailer	<input type="checkbox"/>
RU00010-004		Framing Air Nailer	<input type="checkbox"/>
RU00010-005		Framing Air Nailer	<input type="checkbox"/>
RU00011	:	Power Shovel Group	<input checked="" type="checkbox"/>
RU00011-001		Power Shovel	<input type="checkbox"/>
RU00011-002		Power Shovel	<input type="checkbox"/>
RU00011-003		Power Shovel	<input type="checkbox"/>
RU00011-004		Power Shovel	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

External Document No.

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code Rental Terms Code Alt1
→ PG-001	:	Portable Generators	WEEK-PEND-...	1	EAST
RU00011	:	Power Shovel Group	MONTH-PEND	0	

Lines >



Click on the lookup button in the cell **Rental Terms Code**

Manage	Line	Functions	Related	Fewer options
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
	Portable Generators	WEEK-PEND-...	1	EAST
	Power Shovel Group	MONTH-P	0	
Review or update the value for Rental Terms Code				

Click on the link in cell **Code** with the value **MONTH-PEND-PRO-EOM**

Code	Description
→ MONTH-PEND	Monthly Re
MONTH-PEND EARLY	Monthly Re
MONTH-PEND-OPT	Monthly Re
MONTH-PEND-PRO	Monthly Re
MONTH-PEND-PRO-EOM	Monthly Re
+ New	Select record "MONTH-PEND-PRO-EOM"

Details

Code

Owner No. 10000

Click on the cell **Rental Quantity** with the value **0**

Manage	Line	Functions	Related	Fewer options
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
	Portable Generators	WEEK-PEND-...	1	EAST
	Power Shovel Group	-PRO-EOM	0	

Enter the text **1**.

Manage	Line	Functions	Related	Fewer options
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
	Portable Generators	WEEK-PEND-...	1	EAST
	Power Shovel Group	MONTH-PEN...		



Click on the lookup button in the cell **Location Code**

Functions Related Fewer options							
Item	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods
Generators	WEEK-PEND-...	1	EAST			4/12/2021	
Shovel Group	MONTH-PEN...	1	<input type="button" value="v"/>			4/12/2021	
Shovel Gro...	MONTH-PEN...	1				4/12/2021	

Click on the link in cell **Code** with the value **EAST**

Item	Rental Terms Code	Rental Quantity	Location Code	Terms Code Alt1	Terms Code Alt2	Rental Start Date	No. of Periods
Generators	WEEK-PEND-...	1	EAST			4/12/2021	
Shovel Group	MONTH-PEN...	1	<input type="button" value="v"/>			4/12/2021	
Shovel Gro...	MONTH-PEN...	1					

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the link in cell **Rental Return Date** with the value **5/11/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		5/31/2021	150.00	0.00	0.00
		4/12/2021		<input type="button" value="5/11/2021"/>	9,000.00	0.00	0.00
		4/12/2021		5/11/2021	9,000.00	0.00	0.00

Click on a date in the calendar
Select May 31.

	4/12/2021	<input type="button" value="5/11/2021"/>	9,000.00	0.00	0.00
	4/12/2021			00	0.00

May 2021

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Go to today

Done

Payment Method Code BANK



Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity		
PG-001		Portable Generators	WEEK-PEND-...	1		
→ RU00011	:	Power Shovel Group	MONTH-PEN...	1		
	:	Power Shovel Gro...	MONTH-PEN...	1		

◀

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines						Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity						
PG-001	:	Portable Generators	WEEK-PEND-...	1						
→ RU00011	:	Power Shovel Group	MONTH-PEN...	1						
	:	Power Shovel Gro...	MONTH-PEN...	1						
Review or update the value for Rental Unit No.										

Sales Lines >

Click on the link in cell **No.** with the value **RU00011-003**

Rental Unit List			
Search	Rental	Open in Excel	Related Fewer options Show as me
No. ↑	Description	Group ↑	
→ RU00011-001	Power Shovel		
RU00011-002	Power Shovel		
RU00011-003	Power Shovel		

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity		
PG-001		Portable Generators	WEEK-PEND-...	1		
RU00011		Power Shovel Group	MONTH-PEN...	1		
→ 00011-003 ... :		Power Shovel	MONTH-PEN...	1		

Sales Lines >

Shipping >



Click on the lookup button in the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	
PG-001		Portable Generators	WEEK-PEND-...	1	
RU00011		Power Shovel Group	MONTH-PEN...	1	
RU00011-003		Power Shovel	MONTH-PEN...	1	
→	...			0	

Sales Lines >

Click on the link in cell **No.** with the value **RU00007**

No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00007	16 G Brad Nailer	<input type="checkbox"/>
RU00002	Select record "RU00007" ker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
PG-001		Portable Generators	WEEK-PEND-...	1	EAST
RU00011		Power Shovel Group	MONTH-PEN...	1	EAST
RU00011-003		Power Shovel	MONTH-PEN...	1	EAST
RU00007	...	16 G Brad Nailer	MONTH-PEND	1	EAST

Lines >

Click on the link in cell **Rental Return Date** with the value **5/11/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		5/31/2021	150.00	0.00	0.0
		4/12/2021		5/31/2021	9,000.00	0.00	0.0
		4/12/2021		5/31/2021	9,000.00	0.00	0.0
		4/12/2021		5/11/2021	500.00	0.00	0.0



Click on a date in the calendar

Select May 31.

4/12/2021	5/11/2021	500.00	0.00	0.00		
May 2021						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
Go to today					Done	
Payment Method Code					BANK	
Rental Line Disc. %						

The following picture displays the Rental Amount Lines for the Rental Unit PG-001 with the Weekly EOM term.

- The first 3 lines all have the Billing Date of April 30 as the weekly term has the Enforce End of Month Billing enabled.
- The first 2 lines for April are full weeks for April 12-18 and April 19-25. The 3rd line is a partial period for April 26-30, with the Extended Quantity a prorated quantity of $5/30 = 0.71429$ (rounded to display 5 decimal places).
- The remaining lines all contain the Billing Date of May 31, with the first 4 lines being full weeks and the last line being a partial period for May 29-31 in accordance with the End of Month Billing.

View - Rental Line Rental Amounts												
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑	Billed
Rental	4/12/2021 12:00 AM	4/18/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		4/30/2021	
Rental	4/19/2021 12:00 AM	4/25/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		4/30/2021	
Rental	4/26/2021 12:00 AM	4/30/2021 11:59 PM	0.71429	150.00	107.14		109.28	SUPPLIES	ATLANTA, GA		4/30/2021	
Rental	5/1/2021 12:00 AM	5/7/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		5/31/2021	
Rental	5/8/2021 12:00 AM	5/14/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		5/31/2021	
Rental	5/15/2021 12:00 AM	5/21/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		5/31/2021	
Rental	5/22/2021 12:00 AM	5/28/2021 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	ATLANTA, GA		5/31/2021	
Rental	5/29/2021 12:00 AM	5/31/2021 11:59 PM	0.42857	150.00	64.29		65.58	SUPPLIES	ATLANTA, GA		5/31/2021	

The following picture displays the Rental Amount Lines for the child line of the rental group, which has a monthly prorated EOM rental term.

- The first line has a Billing Date of April 30 and is prorated for April 12-30 as per End of Month Billing.
- The second line is for the full month of May 1-31 with a Billing Date of May 31 as per End of Month Billing.

View - Rental Line Rental Amounts												
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑	Billed
Rental	4/12/2021 12:00 AM	4/30/2021 11:59 PM	0.63333	9,000.00	5,700.00		5,814.00	SUPPLIES	ATLANTA, GA		4/30/2021	
Rental	5/1/2021 12:00 AM	5/31/2021 11:59 PM	1	9,000.00	9,000.00		9,180.00	SUPPLIES	ATLANTA, GA		5/31/2021	

The following picture displays the Rental Amount lines for the unit line that has the monthly periodic end Rental Term, which does not have Prorate set or Enforce End of Month Billing enabled.

When a rental term is not an EOM term, the Billing Cycle Type of End of Month Billing does not apply to that term or rental amount lines for billing purposes.

- Therefore the first line is for April 12 to May 11, with a Billing Date of May 11 as per standard invoicing.
- And the second line is for May 12 to May 31, with a Billing Date of May 31, which is the Rental Return Date and/or the Rental End Billing Date.

View - Rental Line Rental Amounts												
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑	Billed
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	500.00	500.00		510.00	SUPPLIES	ATLANTA, GA		5/11/2021	
Rental	5/12/2021 12:00 AM	5/31/2021 11:59 PM	1	500.00	500.00		510.00	SUPPLIES	ATLANTA, GA		5/31/2021	

Therefore based on the Rental Amount Lines invoice posting would occur on the following dates:

- April 30 for the units with EOM terms on the rental lines



- May 11 for the unit that does not have an EOM term on the rental line
- May 31 for all units on the contract, if returned on time.

The contract is now ready for processing.

The basic processing steps are:

- Print/email or send the Contract report, if applicable
- Ship the Rental Units
- Change the Posting Date to April 30 for processing the first invoice for the unit lines with EOM terms
- Post the April 30 invoice
- Change the Posting Date to May 11 for processing the first invoice for the unit that does not have an EOM term
- Post the May 11 invoice
- Change the Posting Date to May 31 for processing the final invoice and the return of the rental units
- Process the return of the rental units
- Post the May 31 invoice

3.6.3.1.3.

Example of the Error if Enter a Disallowed FOM Term

The following demonstrates the error that will occur when on a contract that has the Billing Cycle Type of End of Month Billing, a Rental Term is selected on the Rental Lines that has Enforce First of Month enabled.

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit p.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
J00011		Power Shovel Group	MONTH-PEND-PRO-EOM	1	EAST
J00011-003		Power Shovel	MONTH-PEND-PRO-EOM	1	EAST
J00007	:	16 G Brad Nailer	MONTH-PEND	1	EAST

Lines >

Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Power Shovel Group	MONTH-PEND-PRO-EOM	1	EAST			
Power Shovel	MONTH-PEND-PRO-EOM	1	EAST			
16 G Brad Nailer	MONTH-PEND	1	EAST			

Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Power Shovel Group	MONTH-PEND-PRO-EOM	1	EAST			
Power Shovel	MONTH-PEND-PRO-EOM	1	EAST			
16 G Brad Nailer	MONTH-PEND	1	EAST			



Click on the link in cell **Code** with the value **MONTH-PSTART-PRO-FOM**

07	:	16 G Brad Nailer	MONTH-PEND	1	EAST
			Code	Description	
			MONTH-PSTART	Monthly Re	
			MONTH-PSTART EARLY	Monthly Re	
			MONTH-PSTART-PRO	Monthly Re	
			MONTH-PSTART-PRO-FOM	Monthly Re	
			MONTH-START	Monthly Re	
			+ New		
Details					
Code					
10000					

Click on **Validation Results Rental Contract Header RC00005 has Billing Cycle Type = End of Month Billing; Enforce First of Month Billing rental terms are not allowed on rental lines.**

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
00011		Power Shovel Group	MONTH-PEND-PRO-EOM	1	EAST
00011-003		Power Shovel	MONTH-PEND-PRO-EOM	1	EAST
00007	:	16 G Brad Nailer	MONTH-PSTART-PRO-FOM	1	EAST
Validation Results					
Rental Contract Header RC00005 has Billing Cycle Type = End of Month Billing; Enforce First of Month Billing rental terms are not allowed on rental lines.					
Lines >					
Find >					

Select revert the change message at the top of the contract to reset the term to the original term and clear the error.

When a contract has the Billing Cycle Type set to End of Month Billing and a user enters or changes the General tab, Rental Term Code field to an FOM term the same type of error will occur.

3.6.3.2. How to Process Contracts for First of Month Billing

3.6.3.2.1. Processing FOM Billing when Rental Management Setup has EOM

The following example will be based on Rental Management Setup having the Billing Cycle Type set to End of Month Billing and the Customer will have a Billing Cycle Type of First of Month.

The Billing Cycle Type setup on the Customer will be the type that defaults to the Invoice Details tab, as the Customer setting takes priority over the setting on Rental Management Setup.

To demonstrate the impact on the invoicing when different FOM terms are entered, the contract rental lines include:

- A rental group with a monthly periodic start term with Enforce First of Month Billing enabled
- A rental unit with a weekly periodic start term with Enforce First of Month Billing enabled

The Rental Start Date and Rental Return Date will be June 11 and August 31 respectively on all rental lines.

The Return Day Billable field is flagged to indicate that the day the units are returned is billable to the customer.

ODT Rentals Online Help

Click on the link **Rental Contract**

ons ▾ Intelligent Cloud Insights ▾ | ☰

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Ren
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	☰ Exc

Click on the lookup button **Sell-to Customer Name**

		Rental Terms Code
		Deposit Amount
		Contract Total
		Outstanding Amount
		Advanced Proforma

Click on the link in cell **No.** with the value **20000**

No.	Name	ZIF
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		

Click on **Invoice Details**

Sales Lines >

Shipping >

Invoice Details >

Transfer Details >



Click on the button **Show more**

A screenshot of a web form. On the right side, there is a button labeled "Show more" which is highlighted with a red rectangular box. Below this button, there is a "Show more fields" link. The form contains several input fields, some of which are numbered 2, 3, 4, and 5.

Click on the field **Billing Cycle Type**

Note that the Billing Cycle Type of First of Month Billing has defaulted from the Customer card.

A screenshot of a web form showing various discount and billing fields. The "Billing Cycle Type" field is highlighted with a red rectangular box and contains the text "First of Month Billing". Other fields include "Default Rental Disc. %", "Rental Package Disc. %", "FA Rental Unit Disc. %", "Item Rental Unit Disc. %", "Resource Rental Unit Disc. %", "G/L Acct Rental Unit Disc. %", "Default Invoicing Period Code", and "Billing Cycle Day".

The Billing Cycle Type, whether defaulted from Rental Management Setup or the Customer card, can be changed on the contract.

Changing the type should always be done prior to entering the Rental Units and Rental Terms on the Rental Lines. Otherwise errors will occur due to the Billing Cycle Types being mutually exclusive.

Click on the cell **Rental Unit No.**

A screenshot of a web interface showing a table with columns: Rental Unit No., Stan... Text Code, Description, and Rental Terms Code. The first cell under "Rental Unit No." is highlighted with a red rectangular box. Above the table is a "Manage" button. Below the table is a "Sales Lines" link with a right arrow.

Click on the lookup button in the cell **Rental Unit No.**

A screenshot of the same web interface as the previous one, but with a dropdown menu open for the "Rental Unit No." cell. The dropdown menu shows a "SALES" option and a text input field with the placeholder "Review or update the value for Rental Unit No.". The "Rental Unit No." cell is highlighted with a red rectangular box.



Click on the link in cell **No.** with the value **RU00008**

BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	Sub Buckeye Ditcher	<input type="checkbox"/>
RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

al Document No.					
Lines | Manage | Line | Functions | Related | Fewer options					
Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
RU00008	...	18 G Brad Nailers G...	MONTH-PEND	0	
Lines >					

Click on the link in cell **Code** with the value **MONTH-PSTART-PRO-FOM**

08	:	18 G Brad Nailers G...	MONTH-PEND	0	
			Code	Description	
			MONTH-PEND-PRO-EOM	Monthly Re	
			MONTH-PSTART	Monthly Re	
			MONTH-PSTART EARLY	Monthly Re	
			MONTH-PSTART-PRO	Monthly Re	
			MONTH-PSTART-PRO-FOM	Monthly Re	
			MONTH-START	Monthly Re	
			+ New		
Details					
ode					

Click on the cell **Rental Quantity** with the value **0**

Line Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
18 G Brad Nailers G...	TH-PSTART-PRO-FOM	0				



Enter the text **2**.

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
18 G Brad Nailers G...	MONTH-PSTART-PRO-FO...	2				

Click on the cell **Location Code**

ctions	Related	Fewer options				
Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	
Nailers G...	MONTH-PSTART-PRO-FO...	2			6/11/2021	

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods
\$... MONTH-PSTART-PRO-FO...	2				6/11/2021	
\$... MONTH-PSTART-PRO-FO...	1					
\$... MONTH-PSTART-PRO-FO...	1					
		Code ↑	Name			
		→ CENTRAL	Central Warehouse			
		EAST	East Warehouse			
		RENTRESERV	Inventory Items Rental Rese			
		SOUTH	South Warehouse			
		TEMP	Temporary Location			
		WEST	West Warehouse			
		+ New				

Click on the cell **Rental Return Date** with the value **7/10/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		6/11/2021		7/10/2021	150.00	0.00	0.0
		6/11/2021		7/10/2021	150.00	0.00	0.0
		6/11/2021		7/10/2021	150.00	0.00	0.0



ODT Rentals Online Help

Click on the link in cell **Rental Return Date** with the value **7/10/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		6/11/2021		7/10/2021	150.00	0.00	0.00
		6/11/2021		7/10/2021	150.00	0.00	0.00
		6/11/2021		7/10/2021	150.00	0.00	0.00

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		7/10/2021	150.00	0.00	0.00		SUPPLIES	0
2021				00	0.00		SUPPLIES	1
2021				00	0.00		SUPPLIES	1

July 2021

Su	Mo	Tu	We	Th	Fr	Sa
						1
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Click on a date in the calendar

Code Alt2	Date	Periods	Return Date	Price	Unit Price	Unit Price	Code
	6/11/2021		7/10/2021	150.00	0.00	0.00	
	6/11/2021				00	0.00	
	6/11/2021				00	0.00	

August 2021

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Go to today Done

Click on the cell **Rental Unit No.**

External Document No.			
Rental Lines	Manage	Line	Functions Related Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ RU00008	:	18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...
	:	18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...
	:	18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...

Sales Lines >



Click on the link in cell **No.** with the value **RU00008-001**

Rental Contract | Work Date: 6/11/2021

Rental Unit List

Search Rental Open in Excel Related Fewer options Show as me

No. ↑	Description	Group ↑
→ RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Unit No.**

Rental Lines Manage Line Functions Related Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
RU00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...
→ 00008-001	...	18 G Brad Nailer	MONTH-PSTART-PRO-FO...
		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines Manage Line Functions Related Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
RU00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...
RU00008-001		18 G Brad Nailer	MONTH-PSTART-PRO-FO...
→		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...

Sales Lines >

Click on the link in cell **No.** with the value **RU00008-002**

Rental Unit List

Search Rental Open in Excel Related Fewer options Show as me

No. ↑	Description	Group ↑
→ RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>



Click on the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
RU00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...		
RU00008-001		18 G Brad Nailer	MONTH-PSTART-PRO-FO...		
→ 00008-002 ...	:	18 G Brad Nailer	MONTH-PSTART-PRO-FO...		
Sales Lines >					
Shipping >					

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code		Description	Rental Terms Code		
RU00008			18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...		
RU00008-001			18 G Brad Nailer	MONTH-PSTART-PRO-FO...		
RU00008-002			18 G Brad Nailer	MONTH-PSTART-PRO-FO...		
→						
Sales Lines >						

Click on the link in cell **No.** with the value **RU00007**

No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00007 :	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
RU00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...	2	EAST
RU00008-001		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
RU00008-002		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
RU00007 ... :		16 G Brad Nailer	MONTH-PEND	1	EAST
Lines >					



Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt	
18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...	2	EAST			
18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST			
18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST			
16 G Brad Nailer	MONTH-PEND	1	EAST			

Click on the link in cell **Code** with the value **WEEK-PSTART-PRO-FOM**

08-002		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST	
07	:	16 G Brad Nailer	MONTH-PEND	1	EAST	
es >						
j >						
Details						
ode						

Click on the cell **Rental Return Date** with the value **6/17/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		6/17/2021	150.00	0.00	0.0
Type the date in the format M/d/yyyy							

Click on the link in cell **Rental Return Date** with the value **6/17/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		8/31/2021	150.00	0.00	0.0
		6/11/2021		6/17/2021	150.00	0.00	0.0



Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	0
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	1
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	1
2021		6/17/2021	150.00	0.00	0.00		SUPPLIES	1

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	0
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	1
2021		8/31/2021	150.00	0.00	0.00		SUPPLIES	1
2021		6/17/2021	150.00	0.00	0.00		SUPPLIES	1

July 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Click on a date in the calendar

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		6/11/2021						
2021		6/11/2021						

August 2021

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Go to today Done

Payment Method Code BANK

The following picture displays the Rental Amount Lines for one of the child lines of the rental group, which has a monthly prorated FOM rental term.

When the rental starts at a date within a calendar month, the first invoice will always be a partial period, in order to configure the invoicing of the subsequent rental periods to occur on the first day of the related month.

The last period to be invoiced may or may not be prorated, depending on the return date on the rental line.

View - Rental Line Rental Amounts										
Search		Open in Excel								
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liable
Rental	6/11/2021 12:00 AM	6/30/2021 11:59 PM	0.66667	150.00	98.00		99.96	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>
Rental	7/1/2021 12:00 AM	7/31/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>
Rental	8/1/2021 12:00 AM	8/31/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>

The first rental amount line has a Billing Date of June 11 as the term is a periodic start term which is for billing in advance. It is a partial period for June 11-30, with the Extended Quantity a prorated quantity of $20/30 = 0.66667$ (rounded to display 5 decimal places).

The second and third lines are for full rental periods, with the Billing Dates set to July 1 and August 1 respectively, in accordance with First of Month Billing.

The following picture displays the Rental Amount lines for the unit rental line with the weekly periodic start prorated FOM term.



With the weekly term, for all calendar months except February, it is the last weekly period that will be a partial period.

This is as the Ending Date-Time is set to the last day of the calendar month so that the next invoice commences on the first of the following month.

View - Rental Line Rental Amounts												
<input type="text"/> Search <input type="button" value="Open in Excel"/>												
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liabile	Billing Date ↑	Billed
Rental	6/11/2021 12:00 AM	6/17/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	6/11/2021	<input type="checkbox"/>
Rental	6/18/2021 12:00 AM	6/24/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	6/11/2021	<input type="checkbox"/>
Rental	6/25/2021 12:00 AM	6/30/2021 11:59 PM	0.85714	150.00	126.00		128.52	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	6/11/2021	<input type="checkbox"/>
Rental	7/1/2021 12:00 AM	7/7/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	7/1/2021	<input type="checkbox"/>
Rental	7/8/2021 12:00 AM	7/14/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	7/1/2021	<input type="checkbox"/>
Rental	7/15/2021 12:00 AM	7/21/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	7/1/2021	<input type="checkbox"/>
Rental	7/22/2021 12:00 AM	7/28/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	7/1/2021	<input type="checkbox"/>
Rental	7/29/2021 12:00 AM	7/31/2021 11:59 PM	0.42857	150.00	63.00		64.26	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	7/1/2021	<input type="checkbox"/>
Rental	8/1/2021 12:00 AM	8/7/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	8/1/2021	<input type="checkbox"/>
Rental	8/8/2021 12:00 AM	8/14/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	8/1/2021	<input type="checkbox"/>
Rental	8/15/2021 12:00 AM	8/21/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	8/1/2021	<input type="checkbox"/>
Rental	8/22/2021 12:00 AM	8/28/2021 11:59 PM	1	150.00	147.00		149.94	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	8/1/2021	<input type="checkbox"/>
Rental	8/29/2021 12:00 AM	8/31/2021 11:59 PM	0.42857	150.00	63.00		64.26	SUPPLIES	CHICAGO, IL	<input checked="" type="checkbox"/>	8/1/2021	<input type="checkbox"/>

Note that for the weeks and partial week with dates in June have the Billing Date of June 11. This is in accordance with Periodic Start invoicing.

Note that the lines with dates in July all have a Billing Date of July 1, and lines with dates in August all have a Billing Date of August 1, as per the First of Month Billing cycle.

The contract is now ready for processing.

The basic processing steps are:

- Print/email or send the Contract report, if applicable
- Ship the Rental Units
- Ensure the Posting Date is set to June 11 for processing the first invoice
- Post the June 11 invoice
- Change the Posting Date to July 1 for processing the July invoice
- Post the July 1 invoice
- Change the Posting Date to August 1 for processing the final invoice
- Post the August 1 invoice
- Change the Posting Date to August 31 for returning the units
- Process the return of the rental units by either entering the Qty. to Return on each rental line or using Bulk Returns to auto-update the lines.

As each invoice is posted, the Last Invoice Date field on the Invoice Details tab will be updated.

The following provides an example of this after posting the June 11 invoice.

Click on the field Last Invoice Date

G/L Acct Rental Unit Disc. %	
Billing Cycle Type	First of Month Billing
Default Invoicing Period Code	
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	6/11/2021
Billing Cycle Date	

**3.6.3.2.2.****Example of the Error if Enter a Disallowed EOM Term**

The following demonstrates the error that will occur when on a contract that has the Billing Cycle Type of First of Month Billing, a Rental Term is selected on the Rental Lines that has Enforce End of Month Billing enabled.

NOTE:

When a contract has the Billing Cycle Type set to First of Month Billing and a user enters or changes the General tab, Rental Term Code field to an EOM term after entering the rental lines, the same type of error will occur.

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Item	Manage	Line	Functions	Related	Footer Options
Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
J00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...	2	EAST
J00008-001		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
J00008-002		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
J00007		16 G Brad Nailer	WEEK-PSTART-PRO-FOM	1	EAST
J00011-C ...		Power Shovel	MONTH-PEND	1	EAST

Lines >

Click on the lookup button in the cell **Rental Terms Code**

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...	2	EAST		
18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST		
18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST		
16 G Brad Nailer	WEEK-PSTART-PRO-FOM	1	EAST		
Power Shovel	MONTH-PEND	1	EAST		

Click on the link in cell **Code** with the value **MONTH-PEND-PRO-EOM**

07		16 G Brad Nailer	WEEK-PSTART-PRO-FOM	1	EAST	
11-003		Power Shovel	MONTH-PEND	1	EAST	

es >

j >

Details

code

Code	Description
MONTH-PEND EARLY	Monthly Re
MONTH-PEND-OPT	Monthly Re
MONTH-PEND-PRO	Monthly Re
MONTH-PEND-PRO-EOM	Monthly Re
MONTH-PSTART	Monthly Re
MONTH-PSTART EARLY	Monthly Re
+ New	

Click on **Validation Results Rental Contract Header RC00006 has Billing Cycle Type = First of Month Billing; Enforce End of Month Billing rental terms are not allowed on rental lines.**

Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
J00008		18 G Brad Nailers ...	MONTH-PSTART-PRO-FO...	2	EAST
J00008-001		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
J00008-002		18 G Brad Nailer	MONTH-PSTART-PRO-FO...	1	EAST
J00007		16 G Brad Nailer	WEEK-PSTART-PRO-FOM	1	EAST
J00011-003		Power Shovel	MONTH-PEND-PRO-EOM	1	EAST

Lines >

ina >

Validation Results
Rental Contract Header RC00006 has Billing Cycle Type = First of Month Billing; Enforce End of Month Billing rental terms are not allowed on rental lines.

Select revert the change message at the top of the contract to reset the term to the original term and clear the error.



3.6.3.3. How to Process Contracts with Billing Cycle Date

3.6.3.3.1. Overview

- The following configurations and setups for the example that will be demonstrated include:
- Rental Management Setup, Billing Cycle Type is set to None.
 - Customer 40000 has Billing Cycle Type set to Billing Cycle Date, and the Default Invoicing Period Code set to Month.
 - Rental Terms have been setup for monthly and weekly rentals with an Invoicing Type of Periodic End and Prorate set to All Periods.
 - Rental Prices for the rental terms have been added to a rental group and a rental unit.

3.6.3.3.2. Creating a Contract Using Billing Cycle Date

- The following example demonstrates the use of Billing Cycle Date on a contract when the initial rental lines entered contain the following:
- A Rental Unit with a weekly, periodic end prorated rental term
 - A rental group with a monthly, periodic end prorated rental term
 - The rental contract will be from April 12 to June 30.

Click on the navigation menu item **Rental Contract**

ons Intelligent Cloud Insights

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	Exc

Click on the lookup button **Sell-to Customer Name**

15

	Rental Terms Code	.....
	Deposit Amount	.....
	Contract Total	.....
	Outstanding Amount	.....
	Advanced Proforma	.....

Click on the link in cell **No.** with the value **40000**

customer Name			
o.			
Date			
ate			
nt Date			
Document No.			

No.↑	Name	ZIP
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New

Lines	Manage	Line	Functions	Related	Fewer options
al Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code



Click on **Invoice Details**

Sales Lines >

Shipping >

Invoice Details >

Transfer Details >

Click on the field **Billing Cycle Type**

Note that the Billing Cycle Type and Default Invoicing Period Code of MONTH defaulted from the Customer card. The settings can be modified, if required.

<input type="checkbox"/>	Default Rental Disc. %	
<input type="checkbox"/>	Rental Package Disc. %	
<input type="checkbox"/>	FA Rental Unit Disc. %	
<input type="checkbox"/>	Item Rental Unit Disc. %	
<input type="checkbox"/>	Resource Rental Unit Disc. %	
<input type="checkbox"/>	G/L Acct Rental Unit Disc. %	
<input checked="" type="checkbox"/>	Billing Cycle Type	Billing Cycle Date
<input type="checkbox"/>	Default Invoicing Period Code	MONTH
<input checked="" type="checkbox"/>	Billing Cycle Day	

Click on the cell **Rental Unit No.**

General >

Rental Lines

Manage

Line

Functions

Related

Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ 			

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

General >

Rental Lines

Manage

Line

Functions

Related

Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ ...			

Sales Lines >



ODT Rentals Online Help

Click on the link in cell **No.** with the value **PG-001**

No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00001	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-END**

Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
PG-001	...	Portable Generators	MONTH-END	0	

Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options				
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2		
Portable Generators	MONTH-END	0					

Click on the link in cell **Code** with the value **WEEK-PEND-PRO**

es	Manage	Line	Functions	Related	Fewer options	
Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Re Te Cc
	:	Portable Generators	MONTH-END	0		
			Code	Description		
			WEEK-PEND-PRO	Weekly Ren		
			WEEK- Select record "WEEK-PEND-PRO"	Weekly Ren		
			WEEK-PSTART	Weekly Ren		
			WEEK-PSTART-PRO	Weekly Ren		
			WEEK-PSTART-PRO-FOM	Weekly Ren		
			WEEK-START	Weekly Ren		
			+ New			



ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Portable Generators	WEEK-PEND-PRC	0				

Enter the text **1**. Press the **Enter** key.

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Portable Generators	WEEK-PEND-PRO	<div><div></div><div>1</div></div>				

Click on the cell **Location Code**

ctions Related Fewer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Generators	WEEK-PEND-PRO	1	<div><div></div><div>▼</div></div>			4/12/2021

Click on the lookup button in the cell **Location Code**

Related	Fewer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Period
s	WEEK-PEND-PRO	1				4/12/2021	

ODT Rentals Online Help


Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. Periods
WEEK-PEND-PRO	1	<input type="text" value="CENTRAL"/>			4/12/2021	
		<div> <div>Code ↑</div> <div>Name</div> </div>				
		→ CENTRAL Central Warehouse				
		EAST East Warehouse				
		RENTRESERV Inventory Items Rental Rese				
		SOUTH South Warehouse				
		TEMP Temporary Location				
		WEST West Warehouse				
		+ New				

Click on the cell **Rental Return Date** with the value **4/18/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		4/18/2021	150.00	0.00	0.00

Click on the link in cell **Rental Return Date** with the value **4/18/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		4/18/2021 	150.00	0.00	0.00

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		4/18/2021	150.00	0.00	0.00		SUPPLIES	1



Click on the link **Next**

Alt1	No. of	Rental	Rental	Alt1	Alt2	Curr...	Tax	Qty. to
Start	Periods	Return	Unit	Rental	Rental	Code	Group	Rent
		Date	Price	Unit	Unit		Code	
2021		4/18/2021	150.00	0.00	0.00		SUPPLIES	1

May 2021

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Click on a date in the calendar

Alt1	Date	Periods	Return	Price	Unit	Unit	Code	Co
			Date		Price	Price		
	4/12/2021		4/18/2021	150.00	0.00	0.00		SU

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Go to today Done

Click on the field **Billing Cycle Date**

Note that the Default Invoicing Period Code is updated to reflect the Invoicing Period Code from the weekly term selected on the rental line, and the Billing Cycle Date is set to the last day of the first weekly rental period.

Item Rental Unit Disc. %	
Resource Rental Unit Disc. %	
G/L Acct Rental Unit Disc. %	
Billing Cycle Type	Billing Cycle Date
Default Invoicing Period Code	WEEK
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	
Billing Cycle Date	4/18/2021

Turn the date in the format M/

Click on the cell **Rental Unit No.**

General

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
→ PG-001		Portable Generators	WEEK-PEND-PRO		

Sales Lines >



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

General

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
PG-001		Portable Generators	WEEK-PEND-PRO		
→	...				

Sales Lines >

Click on the link in cell **No.** with the value **RU00009**

RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>
SUB 18 G BRAD ...	Sub Contracted 18 G Brad Nailer	<input type="checkbox"/>
RU00009	16 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00009-001	16 G Brad Nailer	<input type="checkbox"/>
RU00009-002	16 G Brad Nailer	<input type="checkbox"/>
RU00009-003	16 G Brad Nailer	<input type="checkbox"/>
RU00009-004	16 G Brad Nailer	<input type="checkbox"/>
RU00009-005	16 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

General

Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
PG-001		Portable Generators	WEEK-PEND-PRO	1	EAST
RU00009	...	16 G Brad Nailers G...	MONTH-PEND	0	

Lines >

Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options
Description	Rental Terms Code	Rental Quantity	Location Code
Portable Generators	WEEK-PEND-PRO	1	EAST
16 G Brad Nailers G...	MONTH-PEND	0	



ODT Rentals Online Help

Click on the link in cell **Code** with the value **MONTH-PEND-PRO**

Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Re Te Co
		Portable Generators	WEEK-PEND-PRO	1	EAST	
09	:	16 G Brad Nailers G...	MONTH-PEND	0		
			<div><div>CodeDescription</div><div><div>MONTH-PEND-PRO</div>Monthly Re</div><div>MONTH-PEND-PRO-EOM</div>Monthly Re</div> <div>MONTH-PSTART</div> Monthly Re <div>MONTH-PSTART EARLY</div> Monthly Re <div>MONTH-PSTART-PRO</div> Monthly Re <div>+ New</div>			
Details						

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options		
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Portable Generators	WEEK-PEND-PRO	1	EAST		
16 G Brad Nailers G...	MONTH-PEND-PRO	0			

Enter the text **2**.

Line	Functions	Related	Fewer options		
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Portable Generators	WEEK-PEND-PRO	1	EAST		
16 G Brad Nailers G...	MONTH-PEND-PRO	<div><div></div><div>0</div></div>			

Click on the cell **Location Code**

ctions Related Fewer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Generators	WEEK-PEND-PRO	1	EAST			4/12/2021
Nailers G...	MONTH-PEND-PRO	2				4/12/2021



ODT Rentals Online Help

Click on the lookup button in the cell **Location Code**

Related Fewer options						
Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Period
WEEK-PEND-PRO	1	EAST			4/12/2021	
MONTH-PEND-PRO	2				4/12/2021	
MONTH-PEND-PRO	1				4/12/2021	
MONTH-PEND-PRO	1				4/12/2021	

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Terms Code Alt1	Terms Code Alt2	Rental Start Date	No. of Period
WEEK-PEND-PRO	1	EAST			4/12/2021	
MONTH-PEND-PRO	2				4/12/2021	
MONTH-PEND-PRO	1					
MONTH-PEND-PRO	1					

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the cell **Rental Return Date** with the value **5/11/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		6/30/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0

Click on the link in cell **Rental Return Date** with the value **5/11/2021**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/12/2021		6/30/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0
		4/12/2021		5/11/2021	150.00	0.00	0.0



Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent
2021		6/30/2021	150.00	0.00	0.00		SUPPLIES	1
2021		5/11/2021	150.00	0.00	0.00		SUPPLIES	0
2021				0.00	0.00		SUPPLIES	1
2021					0.00		SUPPLIES	1

May 2021

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Next

Click on a date in the calendar

4/12/2021		6/30/2021	150.00	0.00	0.00		SU
4/12/2021		5/11/2021	150.00	0.00	0.00		SU
4/12/2021				0.00	0.00		SU
4/12/2021				0.00	0.00		SU

June 2021

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Go to today

Done

Click on the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
PG-001		Portable Generators	WEEK-PEND-PRO		
→ RU00009	:	16 G Brad Nailers ...	MONTH-PEND-PRO		
	:	16 G Brad Nailers ...	MONTH-PEND-PRO		
	:	16 G Brad Nailers ...	MONTH-PEND-PRO		

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
PG-001		Portable Generators	WEEK-PEND-PRO		
→ RU00009	:	16 G Brad Nailers ...	MONTH-PEND-PRO		
	:	16 G Brad Nailers ...	MONTH-PEND-PRO		
	:	16 G Brad Nailers ...	MONTH-PEND-PRO		

Review or update the value for Rental Unit No.

Sales Lines >



Click on the link in cell **No.** with the value **RU00009-001**

Rental Contract | Work Date: 4/12/2021

Rental Unit List

Search Rental Open in Excel Related Fewer options Show as me

No. ↑	Description	Group ↑
→ RU00009-001	16 G Brad Nailer	<input type="checkbox"/>
RU00009-002	16 G Brad Nailer	<input type="checkbox"/>
RU00009-003	16 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
PG-001		Portable Generators	WEEK-PEND-PRO
RU00009		16 G Brad Nailers ...	MONTH-PEND-PRO
→ 00009-001 ...		16 G Brad Nailer	MONTH-PEND-PRO
		16 G Brad Nailers ...	MONTH-PEND-PRO

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
PG-001		Portable Generators	WEEK-PEND-PRO
RU00009		16 G Brad Nailers ...	MONTH-PEND-PRO
RU00009-001		16 G Brad Nailer	MONTH-PEND-PRO
→		16 G Brad Nailers ...	MONTH-PEND-PRO

Sales Lines >

Click on the link in cell **No.** with the value **RU00009-002**

Rental Unit List

Search Rental Open in Excel Related Fewer options Show as me

No. ↑	Description	Group ↑
→ RU00009-001	16 G Brad Nailer	<input type="checkbox"/>
RU00009-002	16 G Brad Nailer	<input type="checkbox"/>
RU00009-003	16 G Brad Nailer	<input type="checkbox"/>



ODT Rentals Online Help

Click on the field **Billing Cycle Date**

Note that the Default Invoicing Period Code has been updated to MONTH and the Billing Cycle Date updated to the reflect the first billing date for a monthly rental.

Resource Rental Unit Disc. %	
G/L Acct Rental Unit Disc. %	
Billing Cycle Type	Billing Cycle Date
Default Invoicing Period Code	MONTH
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	
Billing Cycle Date	5/11/2021

When the Rental Lines contain a variety of rental terms the Default Invoicing Period Code will be set to the longest period length.

The Billing Cycle Date will be calculated using the Default Invoicing Period Code and use the billing start date of the earliest rental amount line from all rental lines, with the length being a maximum of the longest period length specified.

Therefore, for this example the calculation of the Billing Cycle Date is using the Start Billing Date of April 12, and the period length from the monthly rental term to determine the Billing Cycle Date of 5/11/2021 as Return Day Billable is flagged on the rental lines.

If Return Day Billable had not been flagged, the Billing Cycle Date would have been set to 5/10/2021.

The following picture displays the Rental Amount Lines for the rental line with the weekly rental term to demonstrate the results of the Default Invoicing Period Code being set to MONTH and the Billing Cycle Date being set based on a monthly cycle.

Note that the Billing Date on the lines are set based on the monthly billing cycle and the generation of a prorated partial period for the last record in each cycle.

View - Rental Line Rental Amounts											
<div>Search Open in Excel</div>											
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑
Rental	4/12/2021 12:00 AM	4/18/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	4/19/2021 12:00 AM	4/25/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	4/26/2021 12:00 AM	5/2/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	5/3/2021 12:00 AM	5/9/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	5/10/2021 12:00 AM	5/11/2021 11:59 PM	0.28571	150.00	42.86		44.15	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	5/12/2021 12:00 AM	5/18/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	5/19/2021 12:00 AM	5/25/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	5/26/2021 12:00 AM	6/1/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	6/2/2021 12:00 AM	6/8/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	6/9/2021 12:00 AM	6/11/2021 11:59 PM	0.42857	150.00	64.29		66.22	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	6/12/2021 12:00 AM	6/18/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/30/2021
Rental	6/19/2021 12:00 AM	6/25/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/30/2021
Rental	6/26/2021 12:00 AM	6/30/2021 11:59 PM	0.71429	150.00	107.14		110.35	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/30/2021

The invoice for the first billing cycle ending May 11, will include the 4 full weekly rental amount lines for April 11 through to May 9, and the prorated partial weekly line for May 10-11.

To prorate the partial period, the Extended Quantity is calculated as 2 days/7 days.

The following picture displays the Rental Amount Lines for the first child rental line of the rental group to demonstrate that for the initial entry and using the calculated Billing Cycle Date, the lines are the same as would be without using the Billing Cycle Date.

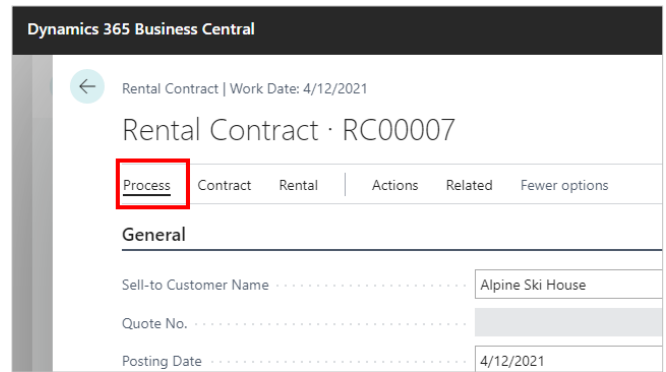
View - Rental Line Rental Amounts											
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab	Billing Date ↑
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	5/11/2021
Rental	5/12/2021 12:00 AM	6/11/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/11/2021
Rental	6/12/2021 12:00 AM	6/30/2021 11:59 PM	0.63333	150.00	95.00		97.85	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>	6/30/2021

3.6.3.3.3.

Processing the Shipment and First Invoice

The following steps cover the rental contract document, shipment, previewing of the Proforma Invoice, posting of the invoice, and the updating of the Invoice Details tab.

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract Rental Actions Related Fewer options

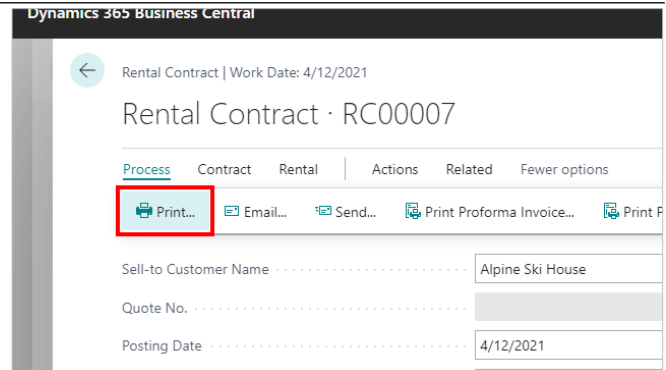
General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/12/2021

Click on the link **Print...**



Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract Rental Actions Related Fewer options

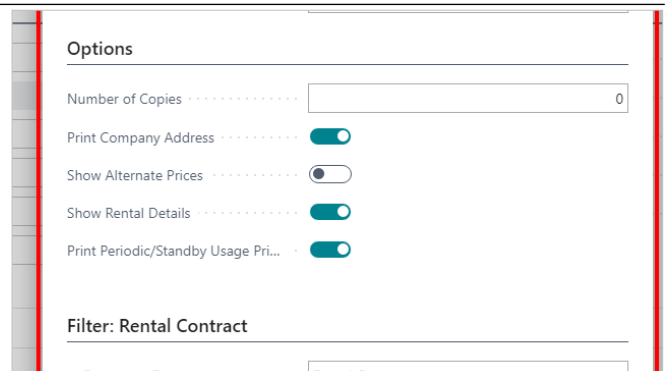
Print... Email... Send... Print Proforma Invoice... Print P

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/12/2021

Complete the Options tab and select the preferred option to Send, Print or Preview the contract



Options

Number of Copies 0

Print Company Address ☒

Show Alternate Prices ☐

Show Rental Details ☒

Print Periodic/Standby Usage Pri... ☒

Filter: Rental Contract

Document Type Rental Contract

The following picture displays the rental contract with the sum of the periods including the partial periods displayed.

The weekly rental is 10 full weeks plus the 3 partial periods, $0.28571 + 0.42857 + 0.71429$ which equals 11.42857 weeks at the weekly rate.

The monthly rental for each group child lines is 2 full weeks plus the partial period of 0.63333, which equals 2.63333 months.



CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Contract

Page: 1

Rental Contract Number: RC00007
Rental Contract Date: 4/12/2021

Sell
To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772

Ship
To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772

P.O. Number
Customer ID 40000
SalesPerson Jim Olive

Ship Via
Ship Method
Terms 1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
PG-001	Portable Generators		1		1,714.29
Rental	Apr 12, 2021 to Jun 30, 2021		11.42857 @ 150.00/ Weekly Rental =		1,714.29
RU00009	16 G Brad Nailers Group		2		
RU00009-001	16 G Brad Nailer	16BN-001	1		395.00
Rental	Apr 12, 2021 to Jun 30, 2021		2.63333 @ 150.00/ Monthly Rental =		395.00
RU00009-002	16 G Brad Nailer	16BN-002	1		395.00
Rental	Apr 12, 2021 to Jun 30, 2021		2.63333 @ 150.00/ Monthly Rental =		395.00

Amount Subject to Sales Tax USD	2,504.29	Subtotal:	2,504.29
Amount Exempt from Sales Tax USD	0.00	Total Sales Tax:	75.13
			Total USD: 2,579.42



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/12/2021

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract Rental Actions Related Fewer options

Ship Rentals Ship and Send... Return Rentals Return and Ser

Post the shipment of the rental units on the rental lines. A posted delivery document is created for the posted deliveries.

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/12/2021

Click on the button **Yes**

Advanced Proforma

Are you sure you want to Ship this rental contract?

Yes No

	Rental Unit	Price	Unit	
1		150.00		
2	EAST	4/12/2021	6/30/2021	150.00
1	EAST	4/12/2021	6/30/2021	150.00
1	EAST	4/12/2021	6/30/2021	150.00

Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

	Rental Unit	Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		150.00	0.00	
	4/12/2021	6/30/2021	150.00	0.00
	4/12/2021	6/30/2021	150.00	0.00
	4/12/2021	6/30/2021	150.00	0.00



Click on the navigation menu item **Print Proforma Invoice...**

mics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract Rental Actions Related Fewer options

Print... Email... Send... **Print Proforma Invoice...** Print Pick List...

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 5/11/2021

Click on Options.

Review and modify the options, if applicable.

Printer (Handled by the browser)

Options

Number of Copies

Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage D... .. ☐

Cut-off Date 5/11/2021

Bill Until Date

Click on **Send to... Print Preview & Close Cancel**

Select the preferred method for reviewing the Proforma Invoice.

× Sell-to Customer No.

× Ship-to Code

+ Filter...

Filter: Rental Additional Note

Send to... Print Preview & Close

The following picture displays the Proforma Invoice for the first billing cycle.



CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Proforma

Page: 1

Rental Contract Number: RC00007

Rental Proforma Date: 5/11/2021

Sell

To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772

Ship

To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772

P.O. Number

Customer ID 40000
SalesPerson Jim Olive

Ship Via

Ship Method
Terms 1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
-----	-------------	------	----------	------------	-------------

Rental Charges:

PG-001	Portable Generators		1		642.86
Rental	Apr 12, 2021 to May 11, 2021		4.28571 @ 150.00/ Weekly Rental =	642.86	
RU00009	16 G Brad Nailers Group		2		
RU00009-001	16 G Brad Nailer	16BN-001	1		150.00
Rental	Apr 12, 2021 to May 11, 2021		1 @ 150.00/ Monthly Rental =	150.00	
RU00009-002	16 G Brad Nailer	16BN-002	1		150.00
Rental	Apr 12, 2021 to May 11, 2021		1 @ 150.00/ Monthly Rental =	150.00	

Amount Subject to Sales Tax USD 942.86

Amount Exempt from Sales Tax USD 0.00

Subtotal: 942.86

Total Sales Tax: 28.29

Total USD: 971.15



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 5/11/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Alpine Ski House

Rental Terms Code ...

Deposit Amount ...

Contract Total ...

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

Rental Unit	Price	Unit
1	150.00	
2 EAST	4/12/2021	6/30/2021
1 EAST	4/12/2021	6/30/2021
1 EAST	4/12/2021	6/30/2021

Click on the button **OK**

Click on the field **Billing Cycle Date**

Note that the Last Invoice Date field is populated with the posting date of the invoice posted. And the Billing Cycle Date is updated to display the end date of the next invoicing period.

Item Rental Unit Disc. %
Resource Rental Unit Disc. %
G/L Acct Rental Unit Disc. %
Billing Cycle Type Billing Cycle Date
Default Invoicing Period Code MONTH
Billing Cycle Day
Billing Tolerance Days
Last Invoice Date 5/11/2021
Billing Cycle Date 6/11/2021

Last Invoice Date: By clicking on the date the Posted Sales Invoice list displaying the invoices posted for the contract will be displayed.

The posted invoice can be reviewed, printed, email or sent by selecting the menu options of Rental, then Posted Invoices.

The following demonstrates the invoicing of the second Billing Cycle.



ODT Rentals Online Help

Click on the field **Posting Date**

il | Actions Related Fewer options

Alpine Ski House

5/11/2021

4/12/2021

5/11/2021

Click on the link **Open the date picker for Posting Date**

ns

Rental Terms Code

Deposit Amount

Contract Total

Open the date picker for Posting Date

Outstanding Amount

Advanced Proforma

Click on the link **Next**

Alpine Ski House

5/11/2021

May 2021

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

Functions

Click on a date in the calendar

Alpine Ski House

5/11/2021

June 2021

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30

Go to today Done

Line Functions

Description Rental Terms Code Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2

The Proforma Invoice can be printed or previewed using the same steps as noted when processing the first invoice.



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/11/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Alpine Ski House Rental Terms Code

1/2021 Deposit Amount

Contract Total

Click on the button **Yes**

Advanced Proforma

Are you sure you want to Invoice this rental contract?

Yes No

	Rental Unit	Price	Unit
1		150.00	
2	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021

Click on the button **OK**

Advanced Proforma

Invoice Posted Successfully.

OK

	Rental Unit	Price	Alt1 Rental Unit Price	Alt2 R Unit
		150.00	0.00	
	4/12/2021	6/30/2021	150.00	0.00
	4/12/2021	6/30/2021	150.00	0.00
	4/12/2021	6/30/2021	150.00	0.00



ODT Rentals Online Help

Click on the field **Billing Cycle Date**

Note that the Last Invoice Date is update to the date the second invoice was posted, and the Billing Cycle Date is updated to the next End Billing Date, which in this example is the same as the Rental Return Date.

Resource Rental Unit Disc. %	
G/L Acct Rental Unit Disc. %	
Billing Cycle Type	Billing Cycle Date
Default Invoicing Period Code	MONTH
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	6/11/2021
Billing Cycle Date	6/30/2021

The posted invoice can be reviewed, printed, email or sent by selecting the menu options of Rental, then Posted Invoices.

The following demonstrates the processing of the final invoice and the return of the rental units.

Click on the field **Posting Date**

Actions	Related	Fewer options
Alpine Ski House		
6/11/2021		
4/12/2021		
6/11/2021		

Click on the link **Open the date picker for Posting Date**

Rental Terms Code	
Deposit Amount	
Contract Total	
Outstanding Amount	
Advanced Proforma	

Click on a date in the calendar

6/11/2021					
June 2021					
Su Mo Tu We Th Fr Sa					
6 7 8 9 10 11 12					
13 14 15 16 17 18 19					
20 21 22 23 24 25 26					
27 28 29 30					
Go to today	Done				
Manage	Line	Functions			
Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
:	Portable Generators	WEEK-PEND-PRO	1	EAST	
:	16 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	
:	16 G Brad Nailers ...	MONTH-PEND-PRO	1	EAST	



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Alpine Ski House Rental Terms Code

Deposit Amount

6/30/2021 Contract Total

Click on the button **Yes**

Advanced Proforma

Are you sure you want to Invoice this rental contract?

Yes No

	Rental Unit	Price	Unit
1		150.00	
2	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021

Click on the button **OK**

Advanced Proforma

Invoice Posted Successfully.

OK

	Rental Unit	Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		150.00	0.00	
		150.00	0.00	
		150.00	0.00	
		150.00	0.00	



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the navigation menu item **Bulk Returns**

RC00007

Actions Related Fewer options

Return Rentals Return and Send... **Bulk Returns** Invoice Invoice and

Alpine Ski House

6/30/2021

Click on the button **OK**

Temporary Location

Unit Price Rental Unit Price

0.00 0.00

0.00 0.00

0.00 0.00

0.00 0.00

Schedule... **OK** Cancel

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract **Rental** Actions Related Fewer options

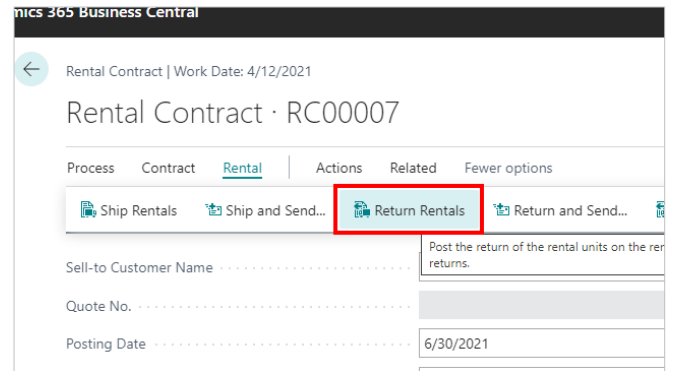
General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the navigation menu item **Return Rentals**



Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00007

Process Contract Rental Actions Related Fewer options

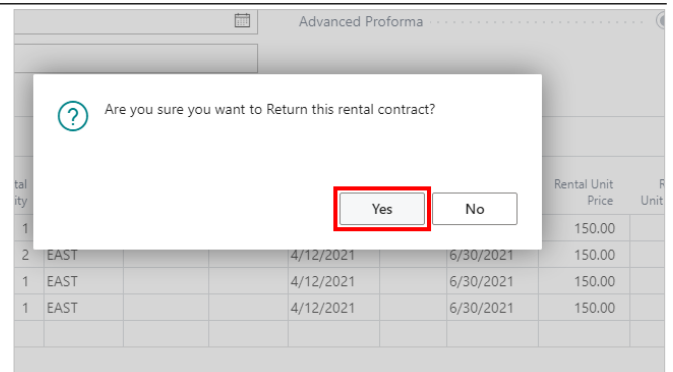
Ship Rentals Ship and Send... **Return Rentals** Return and Send...

Sell-to Customer Name Post the return of the rental units on the returns.

Quote No.

Posting Date 6/30/2021

Click on the button **Yes**

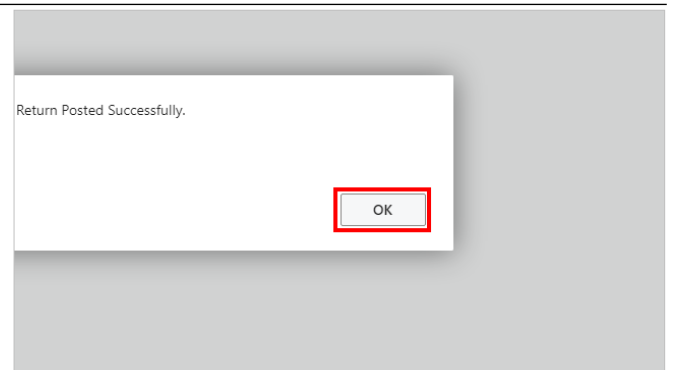


Are you sure you want to Return this rental contract?

Yes No

	Rental Unit	Price	Unit
1	EAST	4/12/2021	6/30/2021
2	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021
1	EAST	4/12/2021	6/30/2021

Click on the button **OK**



Return Posted Successfully.

OK

3.6.3.4. How to Process Billing Cycle Date Contracts with Tolerance Days

3.6.3.4.1. Overview

The following configurations and setups for the example that will be demonstrated include:

- Rental Management Setup, Billing Cycle Type is set to None.
- Customer 10000 will be used with Billing Cycle Type set to None to show setting the Billing Cycle Type and Billing Tolerance Days on the contract.
- Rental Terms have been setup for monthly and weekly rentals with an Invoicing Type of Periodic End and Prorate set to All Periods.
- Rental Prices for the rental terms have been added to a rental group and a rental unit.

3.6.3.4.2. Processing a Contract with Tolerance Days and Modify Billing Cycle Date

The following example demonstrates:

- The configuration of the Billing Cycle Type and Billing Tolerance Days on the contract.
- Entry of a Rental Unit for a weekly rental of 3 weeks.
- The modification of the calculated Billing Cycle Date, which results in the number of days to be invoiced for the Billing Cycle Date to be less than the Billing Tolerance Days, therefore, no invoice will be posted.

Click on the navigation menu item **Rental Contract**

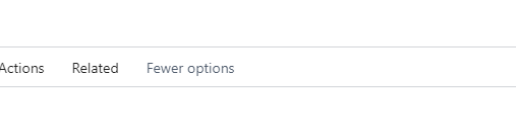
ons ▾ Intelligent Cloud Insights ▾ | ☰

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ <u>Rental Quote</u>	> New	> Set
+ Sales Order	+ Purchase Order	+ <u>Rental Contract</u>	> Payments	> Ren
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	☰ Exc

Click on the field **Sell-to Customer Name**



The screenshot shows a SharePoint list view with a table containing three columns: 'Title', 'Status', and 'Due Date'. The 'Status' column has a dropdown menu open, showing two options: 'In Progress' and 'Completed'. The 'Due Date' column has a date picker icon. The 'Status' dropdown is highlighted with a red box.

Click on the lookup button **Sell-to Customer Name**

		Rental Terms Code
		Review or update the value for Sell-to Customer Name
		Deposit Amount
		Contract Total
		Outstanding Amount
		Advanced Proforma

Click on the link in cell **No.** with the value **10000**

Contract	Rental	Actions	Related	Fewer options
al				
Customer Name				
o.				
Date				
ate				
nt Date				
Document No.				

No. ↑	Name	ZIF
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New



ODT Rentals Online Help

Click on the field **Billing Cycle Type**

G/L Acct Rental Unit Disc. %	
Billing Cycle Type	None
Default Invoicing Period Code	
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	
Billing Cycle Date	

Click on the item **Billing Cycle Date** in the list

	0
	0
	0
	0
None	▼
None	
Billing Cycle Date	
First of Month Billing	
End of Month Billing	
	0

Click on the lookup button **Default Invoicing Period Code**

	0
	0
	0
Billing Cycle Date	▼
	▼
	0
	0

Click on the link in cell **Code** with the value **WEEK**

e Type	Billing Cycle Date
oicing Period Code	
e Day	
rance Days	
e Date	
e Date	

Code ↑	Description
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	



ODT Rentals Online Help

Click on the field **Billing Tolerance Days**

G/L Acct Rental Unit Disc. %	
Billing Cycle Type	Billing Cycle Date
Default Invoicing Period Code	WEEK
Billing Cycle Day	
Billing Tolerance Days	
Last Invoice Date	
Billing Cycle Date	

Enter the text **4**.

	0
	0
Billing Cycle Date	
WEEK	
	0

Click on the button **OK**

Billing Tolerance Days is greater than half of the duration for Invoicing Period Code WEEK; invoicing might be affected.		Rental Unit Price	Curr...	Tax Group Code
		0.00		
OK				

Click on the cell **Rental Unit No.**

External Document No.				
Rental Lines	Manage	Line	Functions	Related
				Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	
Sales Lines >				



Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
→	...				

Sales Lines >

Click on the link in cell **No.** with the value **PG-001**

Rental Unit List

Search Rental Open in Excel Related Fewer options Show as me

No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00001	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
→ RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-END**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
PG-001	...	Portable Generators	MONTH-END	0	

Lines >

Click on the lookup button in the cell **Rental Terms Code**

External Document No.

Line	Functions	Related	Fewer options		
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods
Portable Generators	MONTH-END	0		4/12/2021	



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEEK-PEND-PRO**

Portable Generators	MONTH-END	0	4/
Code		Description	
WEEK-END-OPT-TIME		Weekly Ren	
WEEK-PEND		Weekly Ren	
WEEK-PEND-OPT		Weekly Ren	
WEEK-PEND-PRO		Weekly Ren	
WEEK-PEND-PRO-EOM		Weekly Ren	
+ New			
Details			
Code			

Click on the cell **Rental Quantity** with the value **0**

Line Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	
Portable Generators	WEEK-PEND-PRO	0		4/12/2021		4

Enter the text **1**.

Line Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	
Portable Generators	WEEK-PEND-PRO	1		4/12/2021		4

Click on the cell **Location Code**

Actions Related Fewer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date
Generators	WEEK-PEND-PRO			4/12/2021		4/18/2021



ODT Rentals Online Help

Click on the lookup button in the cell **Location Code**

Related Fewer options							
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date
WEEK-PEND-PRO	1	▼	4/12/2021		4/18/2021	4/12/2021	4/18/2021

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date
WEEK-PEND-PRO	1	▼	4/12/2021		4/18/2021	4/12/2021	4/18/2021

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the cell **No. of Periods**

Fewer options							
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date
WEEK-PEND-PRO	1	EAST ▼	4/12/2021		4/18/2021	4/12/2021	4/18/2021

Enter the text **3**. Press the **TAB** key.

Fewer options							
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date
WEEK-PEND-PRO	1	EAST	4/12/2021	3	4/18/2021	4/12/2021	4/18/2021



Click on the field **Posting Date**

Actions Related Fewer options

Adatum Corporation

4/12/2021

4/12/2021

4/12/2021

Click on the link **Open the date picker for Posting Date**

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Click on a date in the calendar

4/12/2021

April 2021

Su Mo Tu We Th Fr Sa

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Go to today Done

Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date
:	Portable Generators	WEEK-PEND-PRO	1	EAST	4/12/2021

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00008

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/14/2021



Click on the navigation menu item **Invoice**

The screenshot shows the top navigation bar of the ODT Rentals Online Help interface. The 'Invoice' button is highlighted with a red box. Other buttons visible include 'Return and Send...', 'Bulk Returns', 'Invoice and Print', and 'Invoice'. Below the navigation bar, there are fields for 'atum Corporation', 'Rental Terms Code', 'Deposit Amount', and 'Contract Total'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Invoice this rental contract?'. The 'Yes' button is highlighted with a red box. The 'No' button is also visible. The background shows a table with columns for 'Rental Unit' and 'Price'.

Click on the button **OK**

The screenshot shows a message box with the text 'Nothing to Invoice.'. The 'OK' button is highlighted with a red box. The background shows a table with columns for 'Rental Unit', 'Price', 'Curr...', and 'Tax Group Code'.

When there are multiple Rental Lines and if any of the rentals meet the Billing Tolerance Days criteria, then an invoice will be generated including any lines which have less than the tolerance days.

NOTE:

There are other scenarios which may result in not meeting the Billing Tolerance Days criteria.

For example:

- Setting days in the Rental Calendar as Non-Billable
- When billing based on Periodic Usage pricing and the number of days set as Periodic Usage and Standby Charges does not meet the required number of days.

3.6.3.5. How to Process Billing Cycle Date Contracts using Billing Cycle Day

3.6.3.5.1. Overview

The following configurations and setups that have been completed for the example that will be demonstrated include:

- Rental Management Setup, Billing Cycle Type is set to None.
- Customer 20000 will be used with Billing Cycle Type set to Billing Cycle Date and the Default Invoice Period Code set to MONTH.
- Rental Terms have been setup for monthly and weekly rentals with an Invoicing Type of Periodic End and Prorate set to All Periods.
- Rental Prices for the rental terms have been added to a rental group and a rental unit.

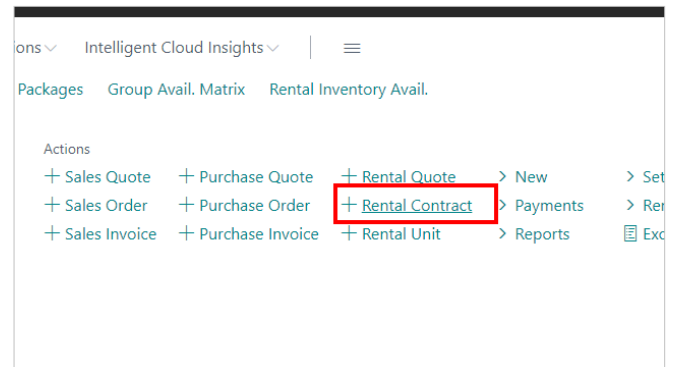
3.6.3.5.2.

Processing a Contract using Billing Cycle Day

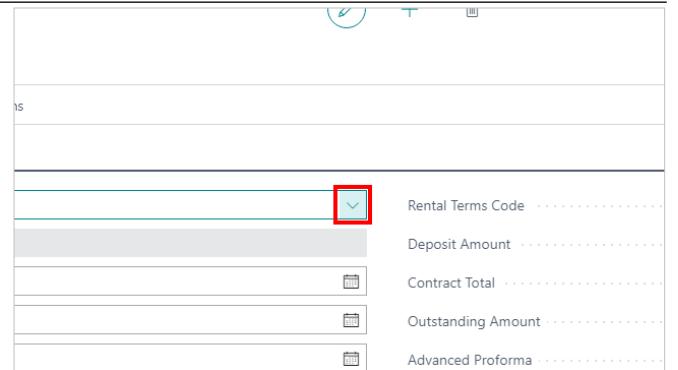
The following example demonstrates:

- The setting of a specific Billing Cycle Day on the Invoice Details tab on which invoicing is to occur each month.
- The entry of rental lines including a rental unit and a rental group having different rental start dates, however will have the same Rental Return Date of June 30.
- Review of the Rental Amount Lines to show the impact on billing when setting the Billing Cycle Day.
- Processing of the rental invoices and showing the updating of the Invoice Details tab, Billing Cycle Date.
- Processing the return of the Rental Units using Bulk Returns.

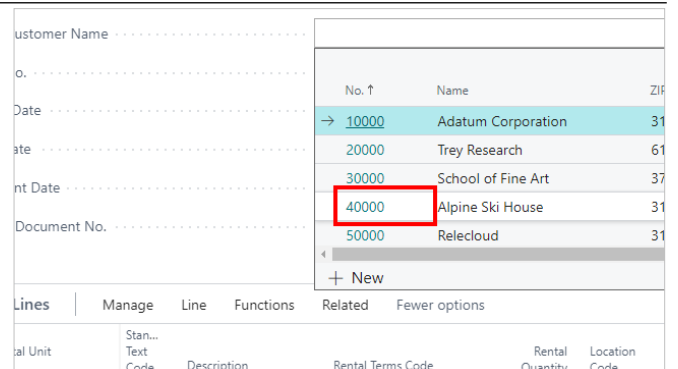
Click on the navigation menu item **Rental Contract**



Click on the lookup button **Sell-to Customer Name**



Click on the link in cell **No.** with the value **40000**



No. ↑	Name	ZIF
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31



ODT Rentals Online Help

Click on the field **Billing Cycle Day**

oad	Rental Package Disc. %	0
	FA Rental Unit Disc. %	0
▼	Item Rental Unit Disc....	0
	Resource Rental Unit ...	0
▼	G/L Acct Rental Unit ...	0
...	Billing Cycle Type	Billing Cycle Date ▼
	Default Invoicing Peri...	MONTH ▼
▼	Billing Cycle Day	0
	Billing Tolerance Days	0
▼	Last Invoice Date	-

Enter the text **20**.

	FA Rental Unit Disc. %	0
▼	Item Rental Unit Disc....	0
	Resource Rental Unit ...	0
▼	G/L Acct Rental Unit ...	0
...	Billing Cycle Type	Billing Cycle Date ▼
	Default Invoicing Peri...	MONTH ▼
▼	Billing Cycle Day	20
	Billing Tolerance Days	0
▼	Last Invoice Date	-

Click on the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
→					

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
→					

Sales Lines >



ODT Rentals Online Help

Click on the link in cell **No.** with the value **PG-001**


No. ↑	Description	Group ↑
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00007	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
→ RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **MONTH-END**

Rental Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
5-001	...	Portable Generators	MONTH-END	0	

Lines >

Click on the lookup button in the cell **Rental Terms Code**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	
Portable Generators	MONTH-END		0		4/12/2021	

Click on the link in cell **Code** with the value **MONTH-PEND-PRO**

es	Manage	Line	Functions	Related	Fewer options	
Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Re De
	⋮	Portable Generators	MONTH-END ▾	0		4/
			Code			Description
			MONTH-PEND-PRO			Monthly Re
			MONTH-PEND-PRO-EOM			Monthly Re
			MONTH-PSTART			Monthly Re
			MONTH-PSTART EARLY			Monthly Re
			MONTH-PSTART-PRO			Monthly Re
			MONTH-PSTART-PRO-FOM			Monthly Re



ODT Rentals Online Help

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Start
MONTH-PEND-PRO	1	▼	4/12/2021		5/11/2021	4/12/2021
		Code ↑	Name			
		→ CENTRAL	Central Warehouse			
		EAST	East Warehouse			
		RENTRESERV	Inventory Items Rental Rese			
		SOUTH	South Warehouse			
		TEMP	Temporary Location			
		+	New			

Click on the cell **Rental Return Date** with the value **5/11/2021**

Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rent
1	EAST ▼	4/12/2021		5/11/2021	4/12/2021	5/11/2021	

Click on the link in cell **Rental Return Date** with the value **5/11/2021**

Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rent
1	EAST	4/12/2021		5/11/2021	4/12/2021	5/11/2021	

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Q
2021		5/11/2021	4/12/2021	5/11/2021	500.00		SUPPLIES	
May 2021								
Su Mo Tu We Th Fr Sa Next								
								1
2	3	4	5	6	7	8		
9	10	11	12	13	14	15		
16	17	18	19	20	21	22		
23	24	25	26	27	28	29		
30	31							



ODT Rentals Online Help

Click on a date in the calendar

Code	Date	Periods	Return Date	Start Date	End Date	Price	Code
AST	4/12/2021		5/11/2021	4/12/2021	5/11/2021	500.00	

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Go to today Done

Click on the cell **Rental Unit No.**

External Document No.:

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ PG-001	:	Portable Generators	MONTH-PEND-PRO

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

External Document No.:

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ PG-001	...	Portable Generators	MONTH-PEND-PRO

Sales Lines >

Click on the link in cell **No.** with the value **RU00009**

No.	RU 0 Brad Nailers Group	
RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>
SUB 18 G BRAD ...	Sub Contracted 18 G Brad Nailer	<input type="checkbox"/>
RU00009	16 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00009-001	16 G Brad Nailer	<input type="checkbox"/>
RU00009-002	16 G Brad Nailer	<input type="checkbox"/>
RU00009-003	16 G Brad Nailer	<input type="checkbox"/>
RU00009-004	16 G Brad Nailer	<input type="checkbox"/>
RU00009-005	16 G Brad Nailer	<input type="checkbox"/>



Enter the text **2**.

Line Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	
Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2021		6
16 G Brad Nailers G...	MONTH-PEND-PRO			4/12/2021		5

Click on the cell **Location Code**

Actions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date
Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2021		6/30/2021
16 G Brad Nailers G...	MONTH-PEND-PRO	2		4/12/2021		5/11/2021

Click on the lookup button in the cell **Location Code**

Related Fewer options						
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental End Date
MONTH-PEND-PRO	1	EAST	4/12/2021		6/30/2021	4/12/2021
MONTH-PEND-PRO	2		4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1		4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1		4/12/2021		5/11/2021	4/12/2021

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental End Date
MONTH-PEND-PRO	1	EAST	4/12/2021		6/30/2021	4/12/2021
MONTH-PEND-PRO	2		4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1					
MONTH-PEND-PRO	1					

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

+ New



ODT Rentals Online Help

Click on the cell **Rental Start Date** with the value **4/12/2021**

lated Fewer options						
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date
MONTH-PEND-PRO	1	EAST	4/12/2021		6/30/2021	4/12/2021
MONTH-PEND-PRO	2	EAST	4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1	EAST	4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1	EAST	4/12/2021		5/11/2021	4/12/2021

Click on the link in cell **Rental Start Date** with the value **4/12/2021**

lated Fewer options						
Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date
MONTH-PEND-PRO	1	EAST	4/12/2021		6/30/2021	4/12/2021
MONTH-PEND-PRO	2	EAST	4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1	EAST	4/12/2021		5/11/2021	4/12/2021
MONTH-PEND-PRO	1	EAST	4/12/2021		5/11/2021	4/12/2021

Click on a date in the calendar

Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date
1	EAST	4/12/2021		6/30/2021	4/12/2021	6/30/2021
2	EAST	4/12/2021		5/11/2021	4/12/2021	5/11/2021
1	EAST				4/12/2021	5/11/2021
1	EAST				4/12/2021	5/11/2021

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Go to today Done

Click on the cell **Rental Return Date** with the value **5/11/2021**

Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Billing
1	EAST	4/12/2021		6/30/2021	4/12/2021	6/30/2021	
2	EAST	4/15/2021		5/11/2021	4/12/2021	5/11/2021	
1	EAST	4/12/2021		5/11/2021	4/12/2021	5/11/2021	
1	EAST	4/12/2021		5/11/2021	4/12/2021	5/11/2021	



ODT Rentals Online Help

Click on the link in cell **Rental Return Date** with the value **5/11/2021**

Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental
1	EAST	4/12/2021		6/30/2021	4/12/2021	6/30/2021	
2	EAST	4/15/20...		5/11/2021	4/12/2021	5/11/2021	
1	EAST	4/12/2021		5/11/2021	Open the date picker for Rental Return Date		
1	EAST	4/12/2021		5/11/2021	4/12/2021	5/11/2021	

Click on the link **Next**

Start	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Q
2021		6/30/2021	4/12/2021	6/30/2021	500.00		SUPPLIES	
2021		5/11/2021	4/15/2021	5/11/2021	150.00		SUPPLIES	
2021		May 2021			150.00		SUPPLIES	
2021					150.00		SUPPLIES	

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

Click on a date in the calendar

AST	4/12/2021		6/30/2021	4/12/2021	6/30/2021	500.00		
AST	4/15/2021		5/11/2021	4/15/2021	5/11/2021	150.00		
AST	4/15/2021					150.00		
AST	4/15/2021					150.00		

June 2021

Su Mo Tu We Th Fr Sa

1 2 3 4 5

6 7 8 9 10 11 12

13 14 15 16 17 18 19

20 21 22 23 24 25 26

27 28 29 30

Go to today Done

Click on the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
PG-001		Portable Generators	MONTH-PEND-PRO		
→ RU00009		16 G Brad Nailers ...	MONTH-PEND-PRO		
		16 G Brad Nailers ...	MONTH-PEND-PRO		
		16 G Brad Nailers ...	MONTH-PEND-PRO		

Sales Lines >



Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code		Description	Rental Terms Code		
PG-001			Portable Generators	MONTH-PEND-PRO		
RU00009			16 G Brad Nailers ...	MONTH-PEND-PRO		
→			16 G Brad Nailers ...	MONTH-PEND-PRO		
			16 G Brad Nailers ...	MONTH-PEND-PRO		

Click on the link in cell **No.** with the value **RU00009-001**

Rental Unit List				
Search	Rental	Open in Excel	Related	Fewer options
Show as me				
No. ↑	Description	Group ↑		
→ RU00009-001	16 G Brad Nailer			
RU00009-002	16 G Brad Nailer			
RU00009-003	16 G Brad Nailer			

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code		Description	Rental Terms Code		
PG-001			Portable Generators	MONTH-PEND-PRO		
RU00009			16 G Brad Nailers ...	MONTH-PEND-PRO		
→ 00009-001 ...	:		16 G Brad Nailer	MONTH-PEND-PRO		
	:		16 G Brad Nailers ...	MONTH-PEND-PRO		
Sales Lines >						

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description		Rental Terms Code		
PG-001		Portable Generators		MONTH-PEND-PRO		
RU00009		16 G Brad Nailers ...		MONTH-PEND-PRO		
RU00009-001		16 G Brad Nailer		MONTH-PEND-PRO		
→	<div><div></div><div>...</div><div></div></div>	16 G Brad Nailers ...		MONTH-PEND-PRO		
Review or update the value for Rental Unit No.						

Sales Lines >



Click on the link in cell **No.** with the value **RU00009-002**

Rental Unit List		
Search	Rental	Open in Excel
Related	Fewer options	Show as me
No. ↑	Description	Group ↑
→ RU00009-001	16 G Brad Nailer	<input type="checkbox"/>
RU00009-002	16 G Brad Nailer	<input type="checkbox"/>
RU00009-003	16 G Brad Nailer	<input type="checkbox"/>

Click on the field **Billing Cycle Date**

Note that on the Invoice Details tab, that the Billing Cycle Date is set to April 20 per the Billing Cycle Day entered.

Had a Billing Cycle Day not been entered the date would be 5/11/2021 based on the Default Invoicing Period Code of MONTH and the Rental Start Date of April 12.

...	Billing Cycle Type	Billing Cycle Date
	Default Invoicing Peri...	MONTH
▼	Billing Cycle Day	20
	Billing Tolerance Days	0
▼	Last Invoice Date	-
▼	Billing Cycle Date	4/20/2021

The following picture displays the Rental Amount Lines for the unit line, PG-001.

Note the following:

- The first record is a partial period for April 12-20 per the Billing Cycle Day being set to 20, which sets Billing Cycle Date to 4/20/2021.
- The Billing Date on the first 3 lines are all set to the 20th of each calendar month included in the contract duration.
- The final record is a partial period from June 21-30 with a Billing Date of June 30. This is as the Rental Return Date/Rental End Billing Date is June 30.

View - Rental Line Rental Amounts										
Search	Open in Excel									
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab
Rental	4/12/2021 12:00 AM	4/20/2021 11:59 PM	0.3	500.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	4/21/2021 12:00 AM	5/20/2021 11:59 PM	1	500.00	500.00		515.00	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	5/21/2021 12:00 AM	6/20/2021 11:59 PM	1	500.00	500.00		515.00	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	6/21/2021 12:00 AM	6/30/2021 11:59 PM	0.33333	500.00	166.67		171.67	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>

The following picture displays the Rental Amount Lines for the first child unit of the rental group, RU00009-001.

Note the following:

- The first record is a partial period for April 15-20 per the Billing Cycle Day being set to 20, which sets Billing Cycle Date to 4/20/2021.
- The Billing Date on the first 3 lines are all set to the 20th of each calendar month included in the contract duration.
- The final record is a partial period from June 21-30 with a Billing Date of June 30. This is as the Rental Return Date/Rental End Billing Date is June 30.

View - Rental Line Rental Amounts										
Search	Open in Excel									
Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Tax Area Code	Tax Liab
Rental	4/15/2021 12:00 AM	4/20/2021 11:59 PM	0.2	150.00	30.00		30.90	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	4/21/2021 12:00 AM	5/20/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	5/21/2021 12:00 AM	6/20/2021 11:59 PM	1	150.00	150.00		154.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>
Rental	6/21/2021 12:00 AM	6/30/2021 11:59 PM	0.33333	150.00	50.00		51.50	SUPPLIES	N.ATL. GA	<input checked="" type="checkbox"/>



The following steps cover the separate shipment of the units on April 12 and April 15.

To ship only the 1 unit on April 12, the Qty. to Rent must be set to 0 on the rental lines of the units that will be shipped on April 15.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date the first unit is being shipped on.

General	
Sell-to Customer Name	Alpine Ski House
Quote No.	
Posting Date	4/12/2021
Order Date	4/12/2021 <small>Type the date</small>
Document Date	4/12/2021
External Document No.	
Rental Lines | Manage | Line | Functions | Related | Fewer options	

Click on the cell **Qty. to Rent** with the value 1

Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %
6/30/2021	500.00		SUPPLIES	1	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	1	0	0	0	0
6/30/2021	150.00		SUPPLIES	1	0	0	0	0

Enter the text 0.

Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %
6/30/2021	500.00		SUPPLIES	1	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
		10/4/2021						

Click on the cell **Qty. to Rent** with the value 1

Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %
6/30/2021	500.00		SUPPLIES	1	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	1	0	0	0	0
				1				



Enter the text **0**.

Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %
6/30/2021	500.00		SUPPLIES	1	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	0	0	0	0	0
6/30/2021	150.00		SUPPLIES	<div></div>	0	0	0	0

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

ProcessContractRentalActionsRelatedFewer options

General

Sell-to Customer NameAlpine Ski House

Quote No.

Posting Date4/12/2021

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

←

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

ProcessContractRentalActionsRelatedFewer options

Ship Rentals

Ship and Send...

Return Rentals

Return and Ser

Sell-to Customer NameAlpine Ski House

Quote No.

Posting Date4/12/2021

Click on the button **Yes**

Advanced Proforma

?

Are you sure you want to Ship this rental contract?

Yes

No

1							Rental Unit Price
1							500.00
2	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00



ODT Rentals Online Help

Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

	Rental Unit	Price	Curr...	Tax Group	
		500.00		SUPP	
4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00	SUPP
4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00	SUPP
4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00	SUPP

Click on the field **Posting Date**

Change the Posting Date to the date that the other units are to be shipped on.

Actions Related Fewer options

Alpine Ski House

4/12/2021

4/12/2021

4/12/2021

Click on the link **Open the date picker for Posting Date**

ns

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Double click on a date in the calendar

4/12/2021

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Go to today Done

Line	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date
	Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2021



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/15/2021

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract Rental Actions Related Fewer options

Ship Rentals Ship and Send... Return Rentals Return and Ser

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/15/2021

Click on the button **Yes**

Advanced Proforma

Are you sure you want to Ship this rental contract?

Yes No

							Rental Unit Price
1							500.00
2	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00

Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

							Rental Unit Price	Curr...	Tax Group Code
							500.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021			150.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021			150.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021			150.00		SUPP

The following steps demonstrate the process steps for posting the first invoice on April 20.



Click on the field **Posting Date**

Actions Related Fewer options

Alpine Ski House

4/15/2021

4/12/2021

4/15/2021

Click on the link **Open the date picker for Posting Date**

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Click on a date in the calendar

4/15/2021

April 2021

Su Mo Tu We Th Fr Sa

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Go to today Done

Start...	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Date
Text Code	Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2
	16 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	4/15/2

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 4/20/2021



Click on the navigation menu item **Invoice**

The screenshot shows the top navigation bar of the ODT Rentals Online Help interface. The 'Invoice' button is highlighted with a red box. Other buttons visible include 'Return and Send...', 'Bulk Returns', 'Invoice and Print', and 'Invoice'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Invoice this rental contract?'. The 'Yes' button is highlighted with a red box. The background shows a table with rental units and their prices.

Click on the button **OK**

The screenshot shows a success message dialog box with the text 'Invoice Posted Successfully.'. The 'OK' button is highlighted with a red box. The background shows a table with rental units and their prices.

Click on the field **Billing Cycle Date**

Note that the Billing Cycle Date has been automatically updated to display the next billing end date.

The screenshot shows the 'Billing Cycle Date' field in the 'Billing Cycle' section, highlighted with a red box. The field contains the date '5/20/2021'. Other fields visible include 'Billing Cycle Type', 'Default Invoicing Period', 'Billing Cycle Day', 'Billing Tolerance Days', 'Last Invoice Date', and 'Billing Cycle Date'.



ODT Rentals Online Help

Click on the field **4/20/2021**

The Posting Date of the invoice just posted automatically populated the Last Invoice Date field. By clicking on the date in the Last Invoice Date field, a Posted Sales Invoice list for this contract will be displayed where the Rental Invoice can be printed, emailed or sent.

<input type="text"/>	G/L Acct Rental Unit ...	<input type="text" value="0"/>
<input type="text"/>	Billing Cycle Type	<input type="text" value="Billing Cycle Date"/>
<input type="text"/>	Default Invoicing Peri...	<input type="text" value="MONTH"/>
<input type="text"/>	Billing Cycle Day	<input type="text" value="20"/>
<input type="text"/>	Billing Tolerance Days	<input type="text" value="0"/>
<input type="text"/>	Last Invoice Date	<input type="text" value="4/20/2021"/>
<input type="text"/>	Billing Cycle Date	<input type="text" value="5/20/2021"/>

Open details for "Last Invoice Da

The following picture displays the Posted Rental Invoice for April 20.



CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

RENTAL INVOICE

Page: 1

Invoice Number: RI00009
Invoice Date: 4/20/2021

Bill To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772
USA

Ship To: Alpine Ski House
Ian Deberry
10 Deerfield Road
GA 31772
USA

Customer ID: 40000
P.O. Number:
Rental Contract No.: RC00010
SalesPerson: Jim Olive
Due Date: 5/20/2021
Terms: 1 Month/2% 8 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
------------------	------	-----------	----------	------------	-------------

Rental Charges:

PG-001	Portable Generators				150.00
Rental	Apr 12, 2021 to Apr 20, 2021		0.3 @ 500.00 / Monthly Rental = 150.00		
RU00009-001	16 G Brad Nailer		Serial No.: 168N-001		30.00
Rental	Apr 15, 2021 to Apr 20, 2021		0.2 @ 150.00 / Monthly Rental = 30.00		
RU00009-002	16 G Brad Nailer		Serial No.: 168N-002		30.00
Rental	Apr 15, 2021 to Apr 20, 2021		0.2 @ 150.00 / Monthly Rental = 30.00		

Amount Subject to Sales Tax USD	210.00	Subtotal:	210.00
Amount Exempt from Sales Tax	0.00		
		Total Sales Tax:	6.30
		Total USD:	216.30

The following demonstrates the processing steps of the second invoice for May 20, and the review of the Invoice Details tab after posting the invoice.



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Related Fewer options

Alpine Ski House

4/20/2021

4/12/2021

4/20/2021

Click on the link **Open the date picker for Posting Date**

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Click on the link **Next**

Alpine Ski House

4/20/2021

April 2021

Su Mo Tu We Th Fr Sa

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Click on a date in the calendar

4/20/2021

May 2021

Su Mo Tu We Th Fr Sa

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

Go to today Done

Line	Description	Rental Terms Code	Quantity	Location Code	Rental Start Date
1	Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2021
2	16 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	4/15/2021



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 5/20/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Finalize the document by posting the amounts an

Alpine Ski House Rental Terms Code

Deposit Amount

5/20/2021 Contract Total

Click on the button **Yes**

Advanced Proforma

Are you sure you want to Invoice this rental contract?

Yes No

						Rental Unit Price
1						500.00
2	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00

Click on the button **OK**

Advanced Proforma

Invoice Posted Successfully.

OK

						Rental Unit Price	Curr... Code	Tax Group Code
						500.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021		150.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021		150.00		SUPP
4/15/2021		6/30/2021	4/15/2021	6/30/2021		150.00		SUPP



ODT Rentals Online Help

Click on the field **Billing Cycle Date**

Note that the date is now updated to the next end billing date for the next invoice on June 20.

...	Billing Cycle Type	Billing Cycle Date
	Default Invoicing Peri...	MONTH
▼	Billing Cycle Day	20
	Billing Tolerance Days	0
▼	Last Invoice Date	5/20/2021
▼	Billing Cycle Date	6/20/2021

Click on the field **5/20/2021**

Note that the Last Invoice Date is updated to display the date of the invoice just posted.

▼	G/L Acct Rental Unit ...	0
...	Billing Cycle Type	Billing Cycle Date
	Default Invoicing Peri...	MONTH
▼	Billing Cycle Day	20
	Billing Tolerance Days	0
▼	Last Invoice Date	5/20/2021
▼	Billing Cycle Date	6/20/2021

The following steps demonstrate the processing of the June 20 invoice, final invoice on June 30, and the return of the Rental Units.

Click on the field **Posting Date**

Actions Related Fewer options	
Alpine Ski House	▼
5/20/2021	
4/12/2021	
5/20/2021	

Click on the link **Open the date picker for Posting Date**

ns	
▼	Rental Terms Code
	Deposit Amount
	Contract Total
	Outstanding Amount
	Advanced Proforma



Click on the link **Next**

Alpine Ski House

5/20/2021

May 2021

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Functions

Click on a date in the calendar

5/20/2021

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Go to today Done

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
P2G-001	:	Portable Generators	MONTH-PEND-PRO	1	EAST
RU00009	:	16 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 5/20/2021

Click on the navigation menu item **Invoice**

Fewer options

Return and Send... Bulk Returns **Invoice** Invoice and Print Invoice

Finalize the document by posting the amounts and

Alpine Ski House Rental Terms Code

5/20/2021 Deposit Amount

Contract Total



Click on the button **Yes**

Advanced Proforma

Are you sure you want to Invoice this rental contract?

Yes No

						Rental Unit Price
1						500.00
2	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021	150.00

Click on the button **OK**

Advanced Proforma

Invoice Posted Successfully.

OK

						Rental Unit Price	Curr... Code	Tax Group Code
						500.00		SUPP
	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00		SUPP
	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00		SUPP
	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00		SUPP

Click on the field **Posting Date**

Advanced Proforma

Alpine Ski House

6/20/2021

4/12/2021

6/20/2021

Click on the link **Open the date picker for Posting Date**

Advanced Proforma

Rental Terms Code

Deposit Amount

Contract Total

Open the date picker for Posting Date

Advanced Proforma



Click on a date in the calendar

Manage	Line	Functions	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date
				Portable Generators	MONTH-PEND-PRO	1	EAST	4/12/2021
				16 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	4/15/2021
				16 G Brad Nailers ...	MONTH-PEND-PRO	1	EAST	4/15/2021

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the navigation menu item **Invoice**

Fewer options

Invoice and Print Invoice

Alpine Ski House Rental Terms Code

Deposit Amount

6/30/2021 Contract Total

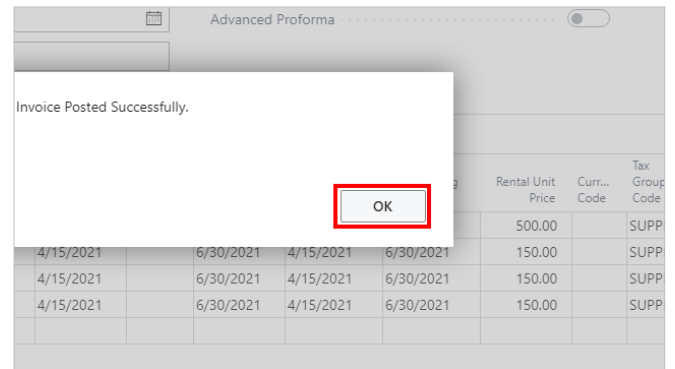
Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

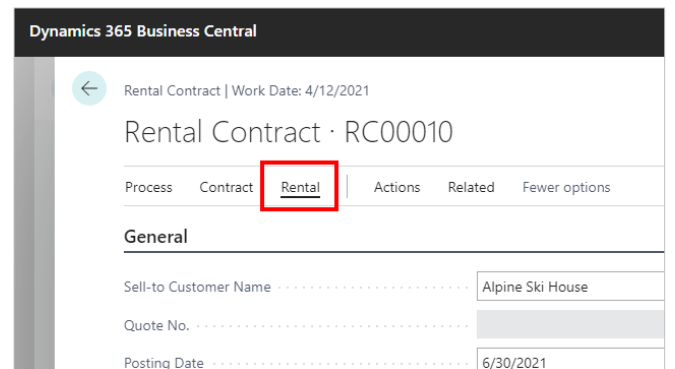
Rental Unit	Rental Price	Rental Unit Price
1	500.00	
2	150.00	
1	150.00	
1	150.00	

Click on the button **OK**

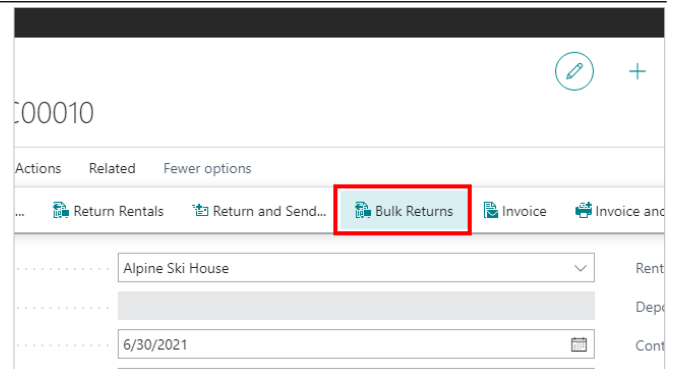


As all Rental Units are being returned on June 30, the Rental Return Date, the using of the Bulk Returns feature is quick and easy as it updates the Qty. to Return on all the rental lines automatically. Rather than going to each rental line and entering the Qty. to Return manually.

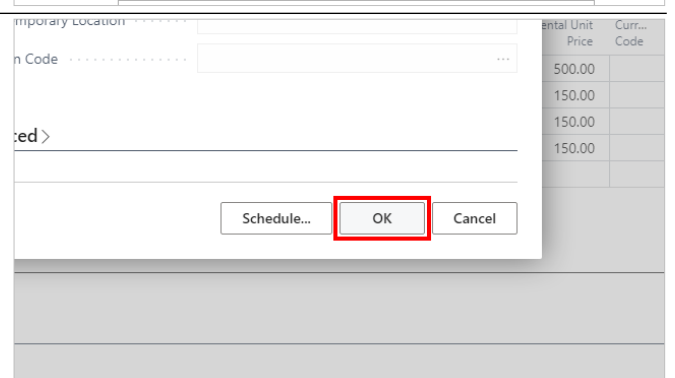
Click on the navigation menu item popup **Rental**



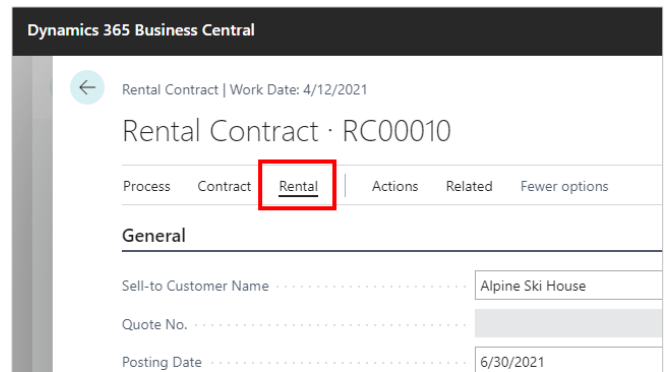
Click on the navigation menu item **Bulk Returns**



Click on the button **OK**



Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract **Rental** Actions Related Fewer options

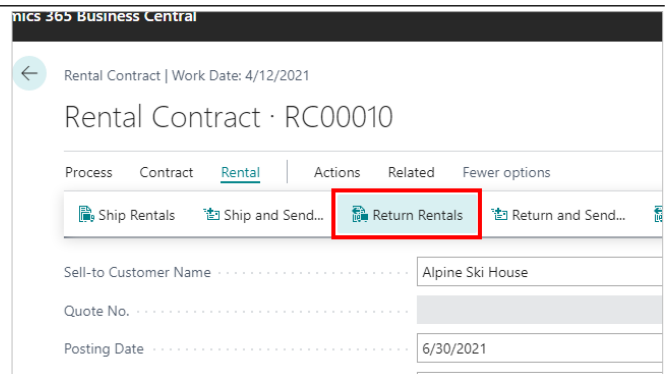
General

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00010

Process Contract Rental Actions Related Fewer options

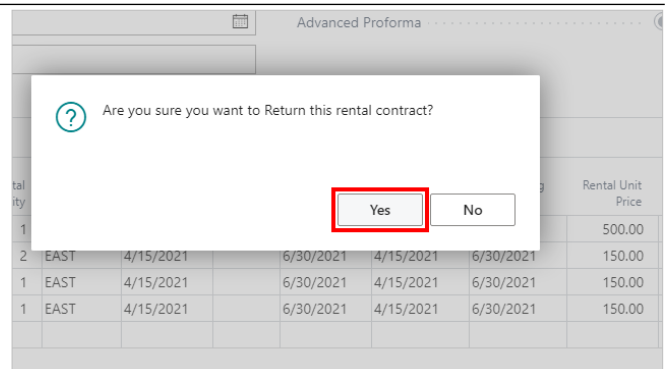
Ship Rentals Ship and Send... **Return Rentals** Return and Send...

Sell-to Customer Name Alpine Ski House

Quote No.

Posting Date 6/30/2021

Click on the button **Yes**



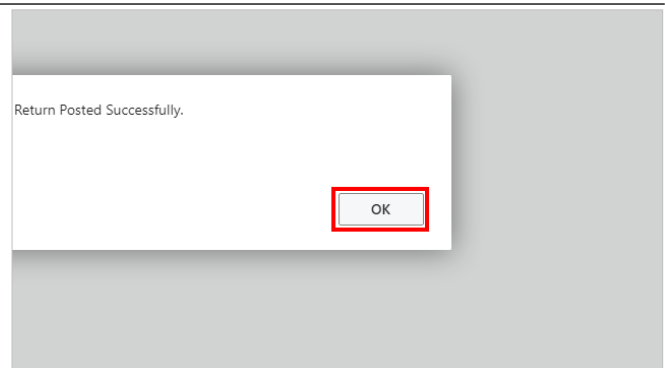
Advanced Proforma

Are you sure you want to Return this rental contract?

Yes No

							Rental Unit Price
1							500.00
2	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00
1	EAST	4/15/2021	6/30/2021	4/15/2021	6/30/2021		150.00

Click on the button **OK**



Return Posted Successfully.

OK

3.7. Processing Contracts Using User Defined Terms

3.7.1. Processing with User Defined Billing Terms Overview

3.7.1.1. Processing Overview for User Defined Billing Terms

When the User Defined Billing Term defaults from the Customer Card, Rental Term field or is entered on the Rental Quote or Rental Contract, General tab, then the lines of the User Defined Billing Term can be view from the Contract menu option.



If on Rental Management Setup the Use Unit Rental Terms is not enabled, and a User Defined Billing Term is on the Rental Terms Code field on the General tab of a quote or contract, the User Defined Billing Term will default to the Rental Lines as a rental group, unit or Roll-up Pricing Package is entered.

When a User Defined Billing Term is entered on a rental group line, the term defaults to the child lines as per standard rentals and can be modified on the child rental lines.

When the term is configured so that the Rental Rates are entered on the Billing Schedule, then when the Rental Rates are entered on a rental group line, the Rental Rates default to the Billing Schedules lines linked to the child units of the group and can be overridden.

When a Roll-up Pricing package is entered on a rental line and a User Defined Billing Term is entered on the package line, the term will default to the component lines. When the term, billing schedule lines does not have the Use Pricing From Setup enabled, then the Rental Rates will need to be specified on the Rental Line, Billing Schedule for all the components.

3.7.1.2. Modifying the Rental Line - Billing Schedule Lines

Prior to invoicing the Rental line, Billing Schedule lines can be modified, and lines can be added or deleted.

Date gaps between the schedule lines is not allowed. The From Date on the second and subsequent lines must be the date after the To Date on the previous line.

Lines can be deleted when none of the dates in the date range on the line have been invoiced. If any of the dates within the date range on a line have been invoiced, then the line cannot be deleted.

When the To Date is modified on a line, then the From Date and To Date on the subsequent lines are automatically updated based on the date formulas of the term lines. The From Date cannot be manually modified on the Billing Schedule lines.

When changing the To Date on a Billing Schedule line the following confirmation message will occur, which will update the From Date and To Date on subsequent lines when Yes is selected on the following confirmation message.

The change to the To Date will cause gaps or overlapping values for From Date/To Date. Do you want to update the following From Date/To Date to keep up with the change?

The following scenarios outlines what can be modified after one or more invoices have been posted, and yes is selected on the confirmation message.

- When the Rental line, Billing Schedule has multiple lines and have invoiced up to the To Date on first Billing Schedule line, which has a Billing Method of Initial Billing, and contains a rental term that is a Fixed Fee (flat) rental term, then the To Date field on the subsequent lines can be modified.
- When the Rental line, Billing Schedule has multiple lines and have only invoiced up to the To Date on first Billing Schedule record, which has a Billing Method of Fixed or Duration and contains a rental term that is not a Fixed Fee (flat) rental term, then the To Date field can modify on the first or subsequent lines.
- When the Rental Line Billing Schedule has multiple lines, and one or more invoices have been posted up to a date within the From Date and To Date on any of the lines, then the To Date can be modified on the line which contains the date invoiced up to. Subsequent lines can have the To Date modified, if required.
- When the Rental line, Billing Schedule has multiple lines and have only invoiced up to the To Date on first Billing Schedule record, which has a Billing Method of Fixed or Duration and contains a rental term that is not a Fixed Fee (flat) rental term, then the To Date field can modify on the first or subsequent lines.



3.7.2. How to Process Contracts with User Defined Variable Daily Rates

3.7.2.1. Overview

The following example demonstrates the processing of a rental contract using a User Defined Billing Term with billing schedule lines containing variable daily rates, which are fixed for multiple date ranges.

For this example, on Rental Management Setup the Use Unit Rental Terms field is disabled.

The User Defined Billing Term will be entered on the contract, General tab and reviewed from the contract menu.

A rental group will be entered on a Rental Line and the group Billing Schedule will be opened from the Rental Line menu.

The Rental Rates will be entered on the rental group Rental Line, Billing Schedule, which will default to the child unit lines, Billing Schedule.

NOTE:

The rates and lines on the rental line, Billing Schedules related to the child lines can be modified to be different than the group line.

3.7.2.2. Processing a Contract with a Variable Daily Rate Term

Click on the navigation menu item **Rental Contract**

Packages Group Avail. Matrix Rental Avail. Calendar Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> Find entries...	> Re
+ Sales Order	+ Purchase Order	+ Rental Contract	> New	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental	Create a new rental contract for rental product	

Click on the lookup button **Sell-to Customer Name**

er options

<input type="text"/>	Rental Terms Code
<input type="text"/>	Deposit Amount
<input type="text"/>	Contract Total
<input type="text"/>	Outstanding Amount
<input type="text"/>	Advanced Proforma



Click on the link in cell **No.** with the value **20000**

No. ↑	Name	ZIP
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

Click on the lookup button **Rental Terms Code**

Rental Terms Code

Choose a value for Rental Terms Code

Code	Description
MONTH-START-...	Monthly Rental for Optimized E
VARIABLE DAILY ...	Variable Daily Rate
WEEK-END	Weekly Rental for Billing at End
WEEK-END-OPT	Weekly Rental for Optimized E
WEEK-END-OPT...	Weekly Rental for Optimized E

Click on the link in cell **Code** with the value **VARIABLE DAILY RATE**

Rental Terms Code

Choose a value for Rental Terms Code

Code	Description
MONTH-START-...	Monthly Rental for Optimized E
VARIABLE DAILY ...	Variable Daily Rate
WEEK-END	Weekly Rental for Billing at End
WEEK-END-OPT	Weekly Rental for Optimized E
WEEK-END-OPT...	Weekly Rental for Optimized E

The following steps demonstrate how to review the User Defined Billing Term lines for the term selected.

Click on the navigation menu item popup **Contract**

Rental Contract - RC00005

Process: **Contract** | Rental | Job | Actions

General

Sell-to Customer Na...: Trey Research

Quote No.:



Click on the navigation menu item **User Defined Billing Term**

Rental Contract · RC00005

Process Contract Rental Job Actions Related Fewer options

Customer Dimensions **User Defined Billing Term** View Change

Sell-to Customer Na... Trey Research Rental Terms Code

Quote No. Deposit Amount

Posting Date 4/11/2022 Contract Total

The following picture displays the lines setup on the User Defined Billing Term that was selected on the General tab of the contract.

Lines		Manage								
	Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup	
→	0D	3D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	4D	24D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	25D	74D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	75D	9999D	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Click on the cell **Rental Unit No.**

External Document No.

Rental Lines Manage Line Functions Related Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→			

Sales Lines Manage More options

Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines Manage Line Functions Related Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→	...		

Sales Lines Manage More options



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00008**

RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
RU00006	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	Sub Buckeye Ditcher	<input type="checkbox"/>
RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00008	Select record "RU00008"	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Terms Code** with the value **VARIABLE DAILY RATE**

Note that the Rental Terms Code defaulted from the General tab.

Document No. <input type="text"/>						
es	Manage	Line	Functions	Related	Fewer options	
Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Re Ter Co
08	<input type="text"/>	18 G Brad Nailers Group	VARIABLE DAILY RATE	0		
s	Manage	More options				

Click on the cell **Rental Quantity** with the value **0**

ne	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rer Ten Cox	
18 G Brad Nailers Group	VARIABLE DAILY RATE	0				
re options						

Enter the text **2**.

ne	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rer Ten Cox	
18 G Brad Nailers Group	VARIABLE DAILY RATE	2				
re options						



ODT Rentals Online Help

Click on the cell **Rental Return Date** with the value **4/11/2022**

Image	Line	Functions	Related	Fewer options				
Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	
		4/11/2022		4/11/2022	0.00	0.00	0.00	
		4/11/2022		4/11/2022	0.00	0.00	0.00	
		4/11/2022		4/11/2022	0.00	0.00	0.00	

Click on the link in cell **Rental Return Date** with the value **4/11/2022**

Image	Line	Functions	Related	Fewer options				
Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	
		4/11/2022		4/11/20	0.00	0.00	0.00	
		4/11/2022		4/11/2022	0.00	0.00	0.00	
		4/11/2022		4/11/2022	0.00	0.00	0.00	

Click on the link **Next**

Related	Fewer options							
Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price			
/2022		4/11/20	0.00	0.00	0.00			
/2022					0.00			
/2022					0.00			

Click on **15** in the calendar

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	
		4/11/2022		4/11/20	0.00	0.00	0.00	
		4/11/2022					0.00	
		4/11/2022					0.00	

The following steps demonstrate the selecting of both of the Rental Units on the group child lines.



Click on the cell **Rental Unit No.**

External Document No.

Rental Lines		Manage	Line	Functions
Rental Unit No.	Stan... Text Code	Description		
→ RU00008	:			18 G Brad Nailers C
	:			18 G Brad Nailers C
	:			18 G Brad Nailers C
4				
Sales Lines		Manage	More options	

Click on the link in cell **No.** with the value **RU00008-005**

No. ↑	Description	Group ↑
→ RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>
RU00008-006	18 G Brad Nailer	<input type="checkbox"/>
RU00008-007	18 G Brad Nailer	<input type="checkbox"/>
SUB 18 G BRAD ...	Sub Contracted 18 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions
Rental Unit No.	Stan... Text Code	Description		
RU00008	:	18 G Brad Nailers G		
→ 00008-005	:	18 G Brad Nailer		
	:	18 G Brad Nailers C		
Sales Lines		Manage	More options	

Click on the link in cell **No.** with the value **RU00008-006**

No. ↑	Description	Group ↑
→ RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>
RU00008-006	18 G Brad Nailer	<input type="checkbox"/>
RU00008-007	18 G Brad Nailer	<input type="checkbox"/>
SUB 18 G BRAD ...	Sub Contracted 18 G Brad Nailer	<input type="checkbox"/>

The following demonstrates the opening of the Billing Schedule for the group rental unit and the entry of the Rental Rates to be used per date range.



Click on the navigation menu item popup **Line**

Posting Date 4/11/2022 Contract Total

Order Date 4/11/2022 Outstanding Am

Document Date 4/11/2022 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ RU00008	:	18 G Brad Nailers Group	VARIABLE DAILY RAT
		18 G Brad Nailers Group	VARIABLE DAILY RAT
		18 G Brad Nailers Group	VARIABLE DAILY RAT

Click on the navigation menu item **Billing Schedule**

Line | Functions | Related | Fewer options

View Rental Calendar | Item Tracking Lines | Attachments

Metered Usage Entries | Additional Notes | Rental Prices

Periodic Usage Entries | Dimensions | **Billing Schedule**

18 G Brad Nailers Group	VARIABLE DAILY RATE	1			
-------------------------	---------------------	---	--	--	--

More options

Click on the cell **From Date** with the value **4/11/2022**

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code
4/11/2022	4/14/2022	Fixed	DAILY-PEND	DAY	DAY
4/15/2022	5/9/2022	Fixed	DAILY-PEND	DAY	DAY
5/10/2022	7/23/2022	Fixed	DAILY-PEND	DAY	DAY
→ 7/24/2022	12/8/2049	Fixed	DAILY-PEND	DAY	DAY

The From Date and To Date fields are set based on the date formulas which are the number of days from the Rental Billing Start Date on the Rental Line.

- OD in the term billing schedule lines, From Day, on the first record was converted to the same date as the Rental Billing Start Date and populated the From Date
- 3D in the term billing schedule lines, To Day, on the first record was converted to be 3 days after the Rental Billing Start Date On the subsequent lines the Date From and Date To are calculated in the same manner.

In this example the Rental Rates must be specified on the Billing Schedule lines in order to have different rental rates for each range of dates on rent.



ODT Rentals Online Help

Click on the cell **Rental Rate** with the value **0.00**

New Payments

Description				Variable Daily Rate		Use Prici... From Setup
Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate		
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>

Enter the text **30.00**.

VARIABLE DAILY RATE		Description				Variable Daily Rate		
Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate	Use Prici... From Setup	
4/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>	
5/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	
6/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	
7/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	

Click on the cell **Rental Rate** with the value **0.00**

Payments

Description				Variable Daily Rate		Use Prici... From Setup
Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate		
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>	
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>	

Enter the text **25.00**.

Payments

Description				Variable Daily Rate		Use Prici... From Setup
Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate		
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	<input type="text" value="25.00"/>		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00		<input type="checkbox"/>



ODT Rentals Online Help

Click on the cell **Rental Rate** with the value **0.00**

Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate	Use Prici... From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Enter the text **20.00**.

Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate	Use Prici... From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Click on the cell **Rental Rate** with the value **0.00**

Rental Terms de	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate	Use Prici... From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

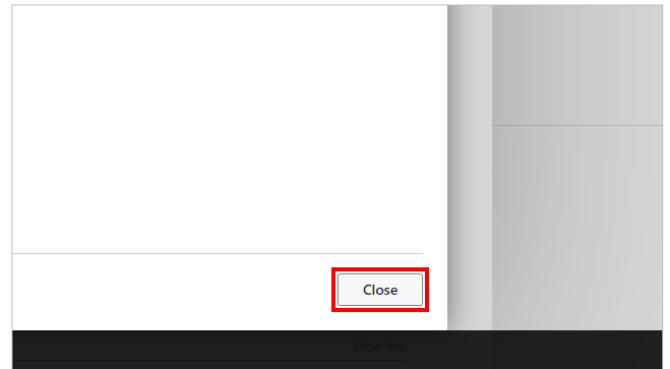
Enter the text **15.00**.

VARIABLE DAILY RATE				Description	Variable Daily Rate		
Rate	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Pror...	Rental Rate	Use Prici... From Setup
4/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
7/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
3/2022	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
8/2049	Fixed	DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>



ODT Rentals Online Help

Click on the button **Close**



The Rental Rates, when specified on the Billing Schedule lines, are utilized in the creation of the Rental Amount Lines rather than the Rental Unit Price from the Rental Line.

The following picture displays the Rental Contract report with the pricing details displaying the date ranges and applicable Rental Rate that will be charged.



CRONUS Rentals, Inc
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Contract

Page: 1

Rental Contract Number: RC00005

Rental Contract Date: 4/11/2022

Sell
To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236

Ship
To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236

P.O. Number
Customer ID 20000
SalesPerson Jim Olive

Ship Via
Ship Method
Terms Net 14 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00008	18 G Brad Nailers Group		2		
RU00008-005	18 G Brad Nailer	188N-005	1		865.00
Rental	Apr 11, 2022 to Apr 14, 2022		4 @ 30.00/ Daily Rental = 120.00		
	Apr 15, 2022 to May 09, 2022		25 @ 25.00/ Daily Rental = 625.00		
	May 10, 2022 to May 15, 2022		6 @ 20.00/ Daily Rental = 120.00		
RU00008-006	18 G Brad Nailer		1		865.00
Rental	Apr 11, 2022 to Apr 14, 2022		4 @ 30.00/ Daily Rental = 120.00		
	Apr 15, 2022 to May 09, 2022		25 @ 25.00/ Daily Rental = 625.00		
	May 10, 2022 to May 15, 2022		6 @ 20.00/ Daily Rental = 120.00		

Amount Subject to Sales Tax USD 1,730.00
Amount Exempt from Sales Tax USD 0.00

Subtotal: 1,730.00

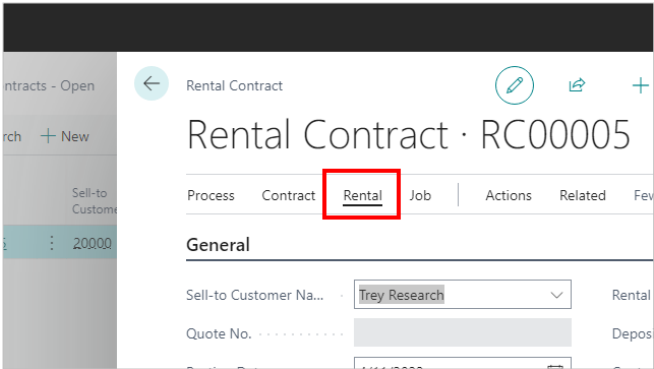
Total Sales Tax: 34.60

Total USD: 1,764.60

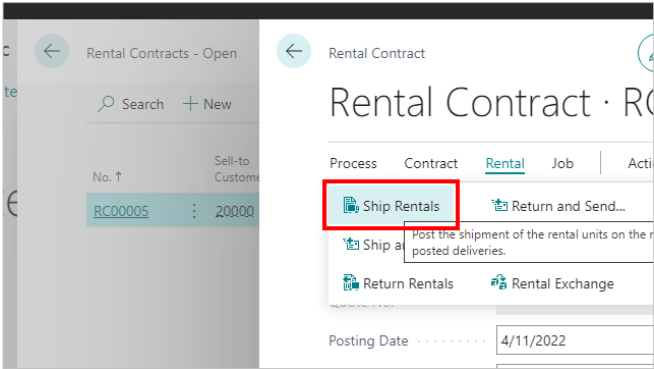
The following steps cover the shipping of the units, then the running of the Proforma Invoice with a Cut-off Date of April 30 to preview what the customer will be billed when invoicing the contract for 20 days.



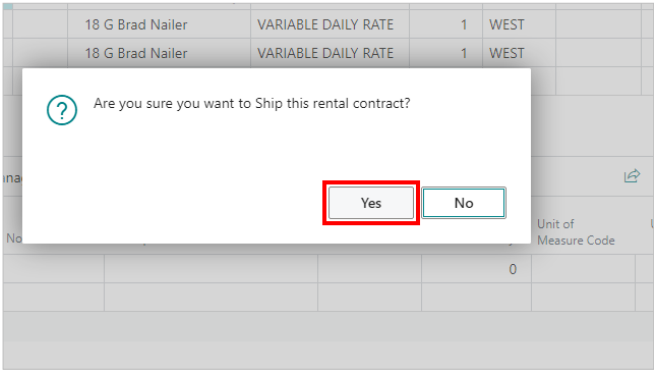
Click on the navigation menu item popup **Rental**



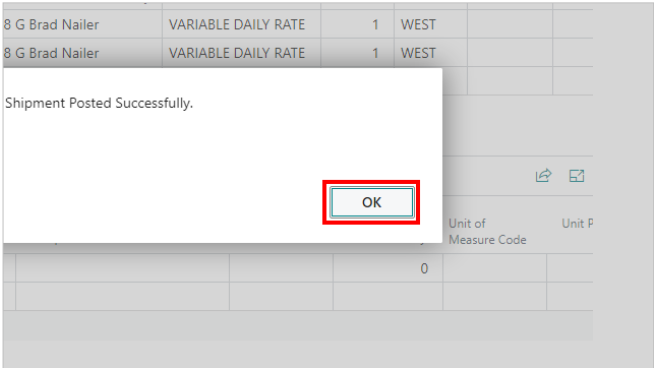
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**

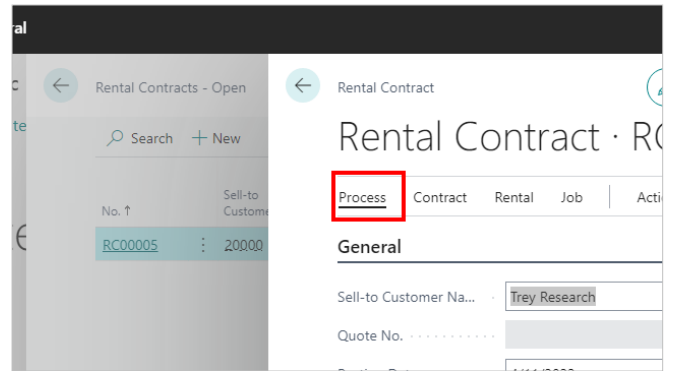


Click on the button **OK**

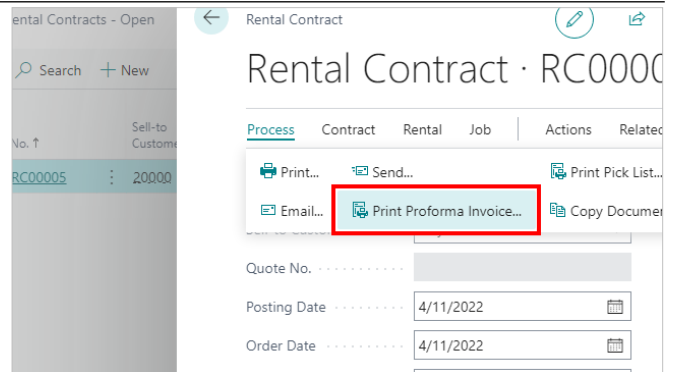




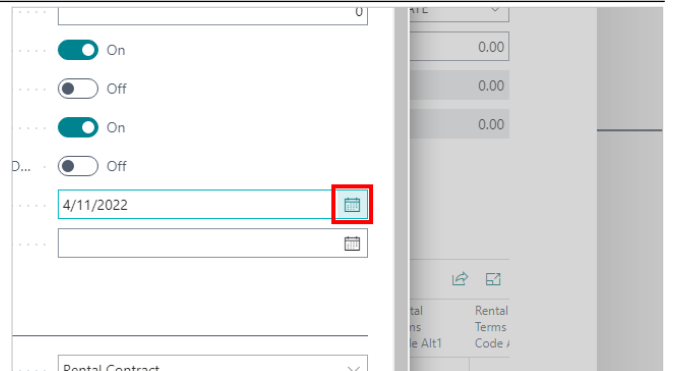
Click on the navigation menu item popup **Process**



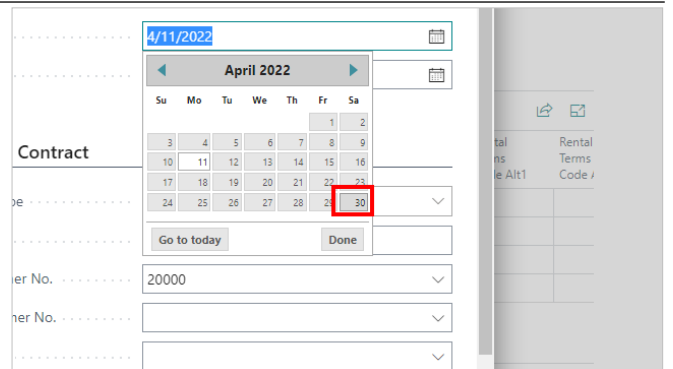
Click on the navigation menu item **Print Proforma Invoice...**



Click on the link **Open the date picker for Cut-off Date**



Click on **30** in the calendar





Click on the button **Preview & Close**

A screenshot of a software interface. At the top, there are several dropdown menus and input fields. Below these, there is a section labeled "Filter: Rental Additional Note". At the bottom of the interface, there are four buttons: "Send to...", "Print", "Preview & Close", and "Cancel". The "Preview & Close" button is highlighted with a red rectangular box.

The following picture displays the Proforma Invoice containing the pricing breakdown for the 20 days that will be invoiced.



CRONUS Rentals, Inc 7122 South Ashford Street Westminster Atlanta, GA 31772		Rental Proforma Page: 1 Rental Contract Number: RC00005 Rental Proforma Date: 4/30/2022			
Sell To: Trey Research Helen Ray 153 Thomas Drive IL 61236	Ship To: Trey Research Helen Ray 153 Thomas Drive IL 61236	P.O. Number Customer ID 20000 SalesPerson Jim Olive Ship Via Ship Method Terms Net 14 days			
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00008	18 G Brad Nailers Group		2		
RU00008-005	18 G Brad Nailer	188N-005	1		520.00
Rental	Apr 11, 2022 to Apr 14, 2022		4 @ 30.00/ Daily Rental = 120.00		
	Apr 15, 2022 to Apr 30, 2022		16 @ 25.00/ Daily Rental = 400.00		
RU00008-006	18 G Brad Nailer		1		520.00
Rental	Apr 11, 2022 to Apr 14, 2022		4 @ 30.00/ Daily Rental = 120.00		
	Apr 15, 2022 to Apr 30, 2022		16 @ 25.00/ Daily Rental = 400.00		
Amount Subject to Sales Tax USD 1,040.00				Subtotal:	1,040.00
Amount Exempt from Sales Tax USD 0.00				Total Sales Tax:	20.80
				Total USD:	1,060.80

The following steps cover the invoicing of 20 days.



Click on the link **Open the date picker for Posting Date**

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Name: Trey Research Rental Terms Code: VARIABLE DAILY RATE

Quote No.: Deposit Amount:

Posting Date: 4/11/2022 Contract Total:

Return Date: 4/11/2022 Outstanding Amount:

Payment Date: 4/11/2022 Advanced Proforma: Off

Internal Document No.:

Click on **30** in the calendar

Posting Date: 4/11/2022 Contract Total:

Return Date: April 2022 Outstanding Amount:

Payment Date: Advanced Proforma: Off

Internal Document No.:

Go to today Done

Unit	Text	Description	Rental Terms Code	Rental Quantity	Location Code
U00008		18 G Brad Nailers Group	VARIABLE DAILY RATE	2	
U00008-005		18 G Brad Nailer	VARIABLE DAILY RATE	1	WEST

Click on the navigation menu item popup **Rental**

Contracts - Open Rental Contract

Rental Contract · RC00005

Process Contract **Rental** Job Actions Related Fewer options

General

Sell-to Customer Name: Trey Research Rental Terms Code: VARIABLE DAILY RATE

Quote No.: Deposit Amount:

Click on the navigation menu item **Invoice**

Optionally the Invoice and Print or Invoice and Send can be selected when invoicing the contract.

Rental Contract

Rental Contract · RC00005

Process Contract Rental Job Actions Related Fewer options

Ship Rentals Return and Send... **Invoice** Create Pro-Forma

Ship and Send... Bulk Returns Invoice and Print Invoice Pro-Forma

Return Rentals Rental Exchange Invoice and Send... Posted Deliveries

Posting Date: 4/30/2022 Contract Total:



Click on the button **Yes**

4/30/2022 Advanced Proforma Off

Are you sure you want to Invoice this rental contract?

Yes No

18 G Brad Nailer	VARIABLE DAILY RATE	1	WEST		
18 G Brad Nailer	VARIABLE DAILY RATE	1	WEST		

Click on the button **OK**

Invoice Posted Successfully.

OK

8 G Brad Nailer	VARIABLE DAILY RATE	1	WEST		
8 G Brad Nailer	VARIABLE DAILY RATE	1	WEST		

The Posted Rental Invoice document can be previewed, printed, etc. from the Posted Sales Invoice.

The following step cover the invoicing of the remaining of the contract and the return of the units.

Click on the link **Open the date picker for Posting Date**

Contract Rental Job Actions Related Fewer options

General

to Customer Na... Trey Research Rental Terms Code VARIABLE DA

te No. Deposit Amount

ing Date 4/30/2022 Contract Total

er Date 4/11/2022 Outstanding Amount

ument Date 4/30/2022 Advanced Proforma Off

nal Document No.

Click on the link **Next**

General

Customer Na... Trey Research Rental Terms Code VARIABLE DAIL

No. Deposit Amount

g Date 4/30/2022 Contract Total

Date April 2022 Outstanding Amount

ent Date Advanced Proforma Off

al Document No.

Lines Man Fewer options



Click on **15** in the calendar

Quote No.

Posting Date 4/30/2022

Order Date

Document Date

External Document No.

Rental Lines | Man...

Go to today Done

Rental Unit No.

Text Code

Description

Rental Terms Code

→ RU00008 ... 18 G Brad Nailers Group VARIABLE DAIL

Click on the navigation menu item popup **Rental**

Contracts - Open

rch + New

Sell-to Customer

20000

Rental Contract

Rental Contract · RC00005

Process Contract **Rental** Job Actions Related Few

General

Sell-to Customer Na... Trey Research Rental

Quote No. Depos

Click on the navigation menu item **Invoice**

Rental Contract

Rental Contract · RC00005

Process Contract Rental Job Actions Related Fewer options

Ship Rentals Return and Send... Invoice Create Pro-Forma

Ship and Send... Bulk Returns Invoice and Print Invoice Pro-Forma

Return Rentals Rental Exchange Invoice and Send... Posted Deliveries

Posting Date 5/15/2022 Contract Total

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

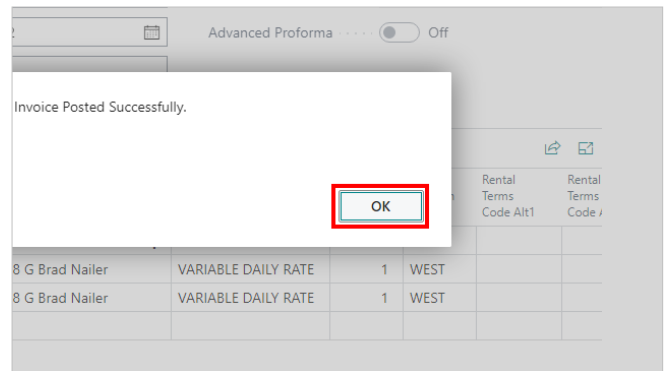
Yes No

18 G Brad Nailer VARIABLE DAILY RATE 1 WEST

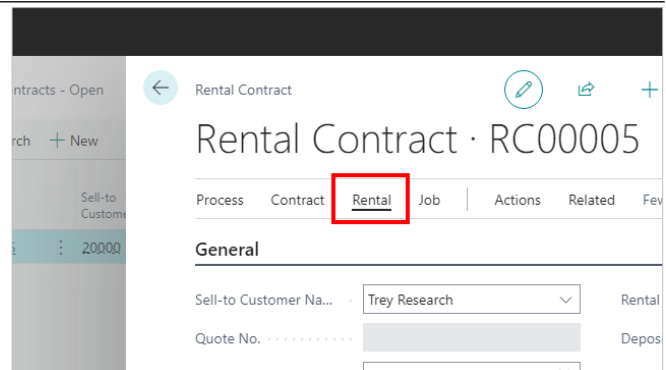
18 G Brad Nailer VARIABLE DAILY RATE 1 WEST



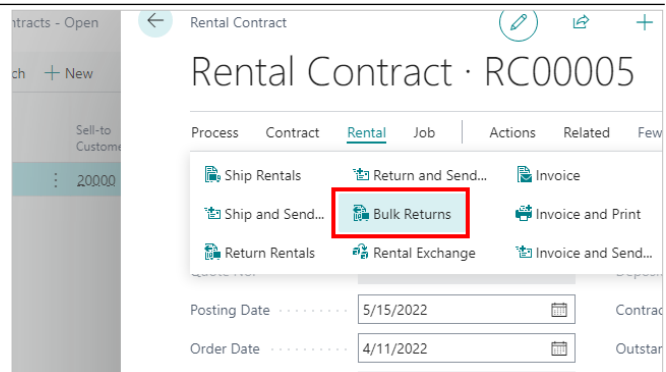
Click on the button **OK**



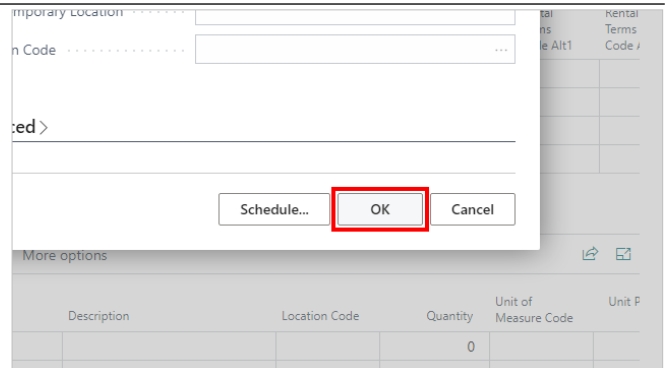
Click on the navigation menu item popup **Rental**



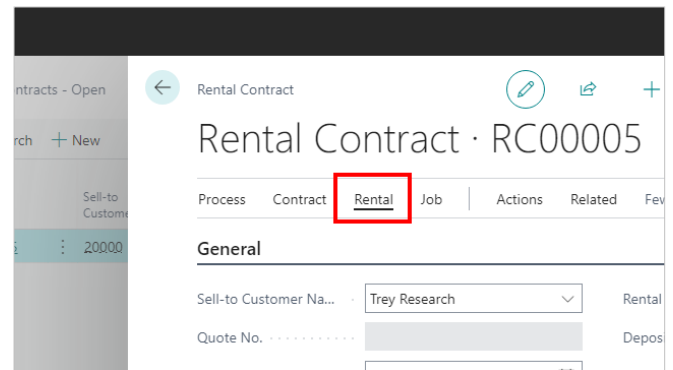
Click on the navigation menu item **Bulk Returns**



Click on the button **OK**



Click on the navigation menu item popup **Rental**



Rental Contract · RC00005

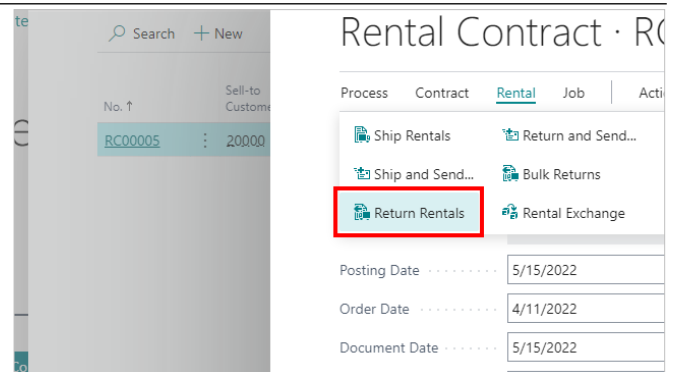
Process Contract **Rental** Job Actions Related Fev

General

Sell-to Customer Na... Trey Research Rental

Quote No. Depos

Click on the navigation menu item **Return Rentals**



Rental Contract · RC00005

Process Contract Rental Job Acti

Ship Rentals Return and Send... Bulk Returns Rental Exchange

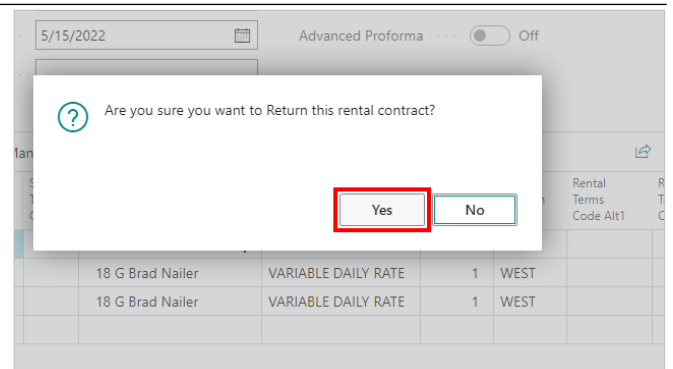
Return Rentals

Posting Date 5/15/2022

Order Date 4/11/2022

Document Date 5/15/2022

Click on the button **Yes**

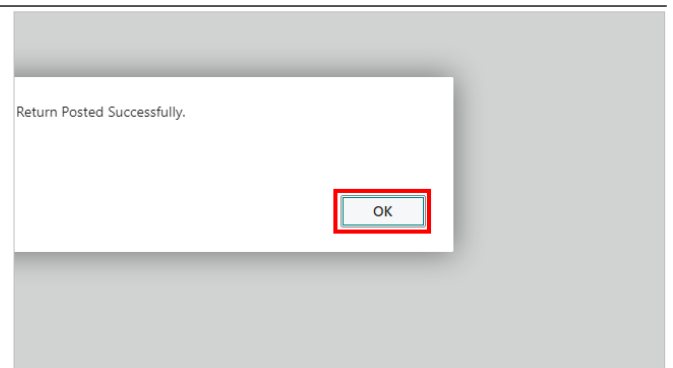


Are you sure you want to Return this rental contract?

Yes No

18 G Brad Nailer	VARIABLE DAILY RATE	1	WEST
18 G Brad Nailer	VARIABLE DAILY RATE	1	WEST

Click on the button **OK**



Return Posted Successfully.

OK

3.7.3. How to Process Contracts with User Defined Duration Daily Rates

3.7.3.1. Overview

The following example demonstrates the processing of a rental contract using a User Defined Billing Term with billing schedule lines containing variable daily rates, which are based on the duration of the rental.

In this example, on Rental Management Setup, the field Use Unit Rental Term is enabled. Therefore, when a rental unit has a default term, that term will default to the rental line.



Therefore, if the User Defined Billing Term is entered on the General tab prior to entering the groups and units on the rental lines, will not default to the lines.
Should the User Defined Billing Term be entered on the General tab after entering the groups and/or units are entered on the rental lines, then a confirmation message will occur.

To demonstrate the confirmation message, the User Defined Billing Term will be entered on the contract General tab after entering a rental group that has a default Rental Term that is different.

3.7.3.2. Processing the Contract with the Duration Based User Defined Billing Term

Click on the navigation menu item **Rental Contract**

Packages Group Avail. Matrix Rental Avail. Calendar Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> Find entries...	> Re
+ Sales Order	+ Purchase Order	+ Rental Contract	> New	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental Un	Create a new rental contract for rental pro	

Click on the lookup button **Sell-to Customer Name**

Rental Contract

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na...	<input type="text"/>	Rental Terms Code	<input type="text"/>
Quote No.	<input type="text"/>	Deposit Amount	<input type="text"/>
Posting Date	<input type="text"/>	Contract Total	<input type="text"/>
Order Date	<input type="text"/>	Outstanding Amount	<input type="text"/>
Document Date	<input type="text"/>	Advanced Proforma	<input type="checkbox"/> Off

Click on the link in cell **No.** with the value **10000**

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na...	<input type="text"/>	Rental Terms C
Quote No.	<input type="text"/>	
Posting Date	<input type="text"/>	
Order Date	<input type="text"/>	
Document Date	<input type="text"/>	
External Document No.	<input type="text"/>	

No.	Name	ZIP
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		



Click on the cell **Rental Unit No.**

External Document No.

Rental Lines

Manage

Line

Functions

Rental Unit No.	Stan... Text Code	Description
→ <input type="text"/>		

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**

External Document No.

Rental Lines

Manage

Line

Functions

Related

Rental Unit No.	Stan... Text Code	Description	Rent
→ <input type="text"/>			

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00008**

BU-000

Buckeye Ditcher

RU00002

Buckeye Ditcher

RU00003

Buckeye Ditcher

RU00004

Buckeye Ditcher

RU00005

Buckeye Ditcher

RU00006

Buckeye Ditcher

SUB BUCKE...

Sub Buckeye Ditcher

RU00008

18 G Brad Nailers Group

RU00008-0...

18 G Brad Nailer

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Note that a Rental Term has defaulted to the Rental Line from the Rental Unit card.

Document No.

es

Manage

Line

Functions

Related

Fewer options

/nit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Re Ter Co
08	...	18 G Brad Nailers Group	MONTH-PEND	0		

s

Manage

More options



ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

ne Functions Related Fewer options

escription

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Rer Ten Cox

8 G Brad Nailers Group

MONTH-PEND

0

re options

Enter the text **2**.

ne Functions Related Fewer options

escription

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Rer Ten Cox

8 G Brad Nailers Group

MONTH-PEND

re options

Click on the lookup button **Rental Terms Code**

RC00007

Actions Related Fewer options

Show more

oration

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

0.00

673.20

673.20

Off

Click on the link in cell **Code** with the value **DURATION DAILY RATE**

Show more

New Paym

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Code

Description

DURATION DAIL..

DURATION DAIL..

FIXED FEE END

FIXED FEE START

IB DAILY DURATI..

Daily Rental - Per. End Billing W

Duration Variable Daily Term

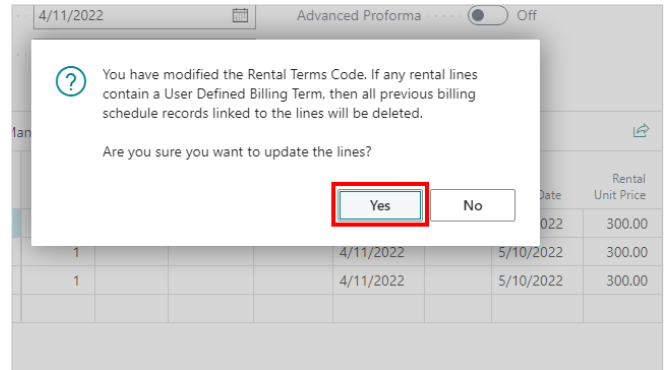
Fixed Fee in Arrears

Fixed Fee in Advance

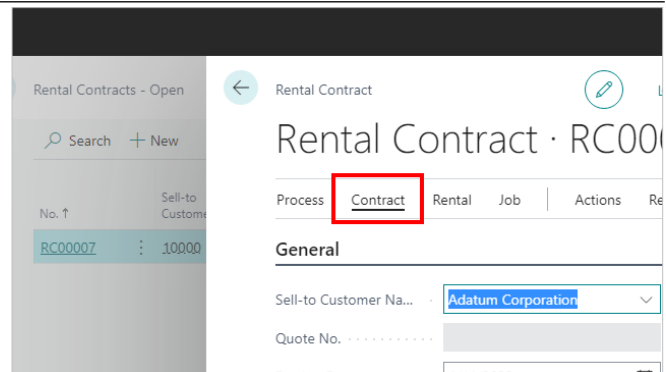
Initial Billing Fixed Fee with Du

tions Related Fewer options

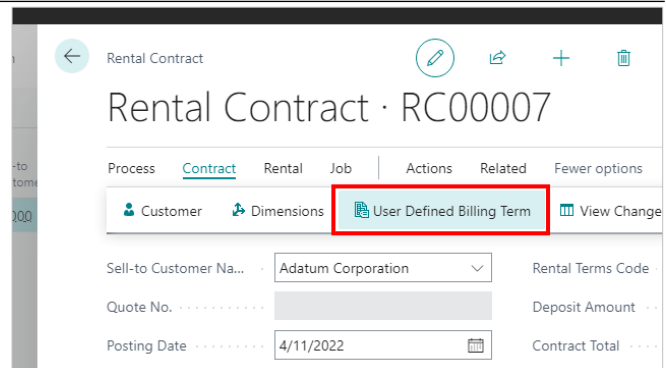
Click on the button **Yes**



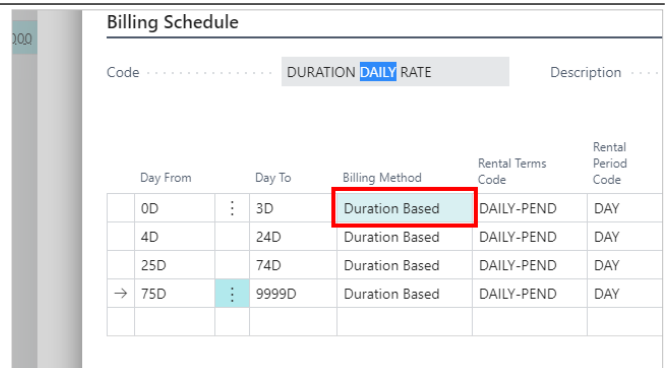
Click on the navigation menu item popup **Contract**



Click on the navigation menu item **User Defined Billing Term**



Click on the cell **Billing Method** with the value **Duration Based**



Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code
0D	3D	Duration Based	DAILY-PEND	DAY
4D	24D	Duration Based	DAILY-PEND	DAY
25D	74D	Duration Based	DAILY-PEND	DAY
75D	9999D	Duration Based	DAILY-PEND	DAY



Click on the column header **Use Pricing From Setup**

Use Pricing From Setup
Specifies whether the rental unit price for the rental term is to default from the rental price card setup to the rental billing schedule.
[Learn more](#)

Use Pricing From Setup

Note that the field, Use Pricing From Setup, is not checked on the lines as the same Rental Term is on all the lines, which is required when using the Billing Method of Duration. Therefore, the Rental Rates must be entered on the Rental Line, Billing Schedules for the Rental Lines with the User Defined Billing Term.

Click on the button **Close**

Close

Click on the cell **Rental Unit No.** with the value **RU00008**

Rental Unit No.	Stan... Text Code	Description
RU00008		18 G Brad Nailers C
		18 G Brad Nailers C
		18 G Brad Nailers C

Click on the cell **Rental Return Date** with the value **4/11/2022**

Init	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
008		4/11/2022		4/11/2022	4/11/2022	4/11/2022	0.00
		4/11/2022		4/11/2022	4/11/2022	4/11/2022	0.00
		4/11/2022		4/11/2022	4/11/2022	4/11/2022	0.00



Click on the link in cell **Rental Return Date** with the value **4/11/2022**

Document No. -

es	Manage	Line	Functions	Related	Fewer options		
Unit	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
008	:	4/11/2022		4/11/20	4/11/2022	4/11/2022	0.00
		4/11/2022		4/11/2022	4/11/2022	4/11/2022	0.00
		4/11/2022		4/11/2022	4/11/2022	4/11/2022	0.00

Click on the link **Next**

Functions | Related | Fewer options								
Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt1 Rental Unit Price		
/2022		4/11/20	4/11/2022	4/11/2022	0.00	0.00		
/2022					0.00	0.00		
/2022					0.00	0.00		

April 2022

Su	Mo	Tu	We	Th	Fr	Sa
						1
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Click on **13** in the calendar

Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt1 Rental Unit Price		
4/11/2022		4/11/20	4/11/2022	4/11/2022	0.00	0.00		
4/11/2022					0.00	0.00		
4/11/2022					0.00	0.00		




May 2022

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Go to today Done

The Rental Rates can be entered on the group unit line, which will default to the child unit lines. The Rental Rates can be modified on the child unit lines Billing Schedule.

Click on the navigation menu item popup **Line**

Posting Date	4/11/2022		Contract Total
Order Date	4/11/2022		Outstanding Am
Document Date	4/11/2022		Advanced Profor
External Document No.	<input type="text"/>		

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.		Stan... Text Code	Description	Rental Terms Code		
→	RU000008	...	18 G Brad Nailers Group	DURATION DAILY RA		
			18 G Brad Nailers Group	DURATION DAILY RA		
			18 G Brad Nailers Group	DURATION DAILY RA		



Click on the navigation menu item **Billing Schedule**

The screenshot shows a navigation menu with the following options: Line, Functions, Related, Fewer options. Below these are: View Rental Calendar, Item Tracking Lines, Attachments, Metered Usage Entries, Additional Notes, Rental Prices, Periodic Usage Entries, Dimensions, and Billing Schedule (highlighted with a red box). Below the menu is a table with columns: 18 G Brad Nailers Group, DURATION DAILY RATE, and 1.

Click on the cell **From Date** with the value **4/11/2022**

The Day From and Day To, date formulas on the term lines are converted to dates on the rental line Billing Schedule lines.

The screenshot shows the Billing Schedule table with columns: Code, From Date, To Date, Billing Method. The first row has the following values: Code: DURATION DAILY RATE, From Date: 4/11/2022 (highlighted with a red box), To Date: 4/14/2022, Billing Method: Duration Based. The second row has: From Date: 4/15/2022, To Date: 5/9/2022, Billing Method: Duration Based. The third row has: From Date: 5/10/2022, To Date: 7/23/2022, Billing Method: Duration Based. The fourth row has: From Date: 7/24/2022, To Date: 12/8/2049, Billing Method: Duration Based.

The Rental Rates must be entered on each line to specify what rate may be billed to the customer depending on the duration of the rental.

The rate to be used when invoicing is based on the total rental duration from Rental Billing Start Date to Rental Billing End Date on the rental line.

The Rental Rates entered will decline the longer the total rental is for.

The customer will be billed using the determined rental rate throughout the contract.

Click on the cell **Rental Rate** with the value **0.00**

The screenshot shows the Rental Rate table with columns: Rental Terms Code, Rental Period Code, Invoicing Period Code, Prorate, Rental Rate, Use Pricing From Setup. The first row has the following values: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00 (highlighted with a red box), Use Pricing From Setup: ☐. The second row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐. The third row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐. The fourth row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐.

Enter the text **30.00**.

The screenshot shows the Rental Rate table with columns: Rental Terms Code, Rental Period Code, Invoicing Period Code, Prorate, Rental Rate, Use Pricing From Setup. The first row has the following values: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 30.00 (highlighted with a red box), Use Pricing From Setup: ☐. The second row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐. The third row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐. The fourth row has: Rental Terms Code: DAILY-PEND, Rental Period Code: DAY, Invoicing Period Code: DAY, Prorate: ☐, Rental Rate: 0.00, Use Pricing From Setup: ☐.



ODT Rentals Online Help

Click on the cell **Rental Rate** with the value **0.00**

Description Duration Variable Daily Term					
Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Enter the text **25.00**.

Description Duration Variable Daily Term					
Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Click on the cell **Rental Rate** with the value **0.00**

Description Duration Variable Daily Term					
Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Enter the text **20.00**.

Description Duration Variable Daily Term					
Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>



ODT Rentals Online Help

Click on the cell **Rental Rate** with the value **0.00**

Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Enter the text **15.00**.

Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	30.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	25.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>
DAILY-PEND	DAY	DAY	<input type="checkbox"/>	15.00	<input type="checkbox"/>

Click on the button **Close**

Close

Show less

Click on the cell **Rental Unit No.**

External Document No.

Rental Lines		Manage	Line	Functions
Rental Unit No.	Stan... Text Code	Description		
→ RU00008	:	18 G Brad Nailers C		
	:	18 G Brad Nailers C		
	:	18 G Brad Nailers C		
4				

Sales Lines

Manage

More options



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00008-003**

Rental Unit List	
Search	Rental | Related | Fewer options
No. ↑	Description
→ RU00008-001	18 G Brad Nailer
RU00008-002	18 G Brad Nailer
RU00008-003	18 G Brad Nailer
RU00008-004	18 G Brad Nailer
RU00008-005	18 G Brad Nailer
RU00008-006	18 G Brad Nailer
RU00008-007	18 G Brad Nailer
SUB 18 G BRAD ...	Sub Contracted 18 G Brad

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions
Rental Unit No.	Stan... Text Code	Description		
RU00008		18 G Brad Nailers G		
→ RU00008-003		18 G Brad Nailer		
		18 G Brad Nailers G		
Sales Lines		Manage	More options	

Click on the link in cell **No.** with the value **RU00008-004**

Rental Unit List	
Search	Rental | Related | Fewer options
No. ↑	Description
→ RU00008-001	18 G Brad Nailer
RU00008-002	18 G Brad Nailer
RU00008-003	18 G Brad Nailer
RU00008-004	18 G Brad Nailer
RU00008-005	18 G Brad Nailer
RU00008-006	18 G Brad Nailer
RU00008-007	18 G Brad Nailer
SUB 18 G BRAD ...	Sub Contracted 18 G Brad

Click on **Rental Unit No. = RU00008-003**, **Rental Terms Code = DURATION DAILY RATE**, **Rental Quantity = 1**

Rental Lines		Manage	Line	Function
Rental Unit No.	Stan... Text Code	Description		
RU00008		18 G Brad Nail		
RU00008-003		18 G Brad Nail		
→ RU00008-004		18 G Brad Nail		
Sales Lines		Manage	More options	



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date 4/11/2022 Contract Total

Order Date 4/11/2022 Outstanding Am

Document Date 4/11/2022 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
RU00008		18 G Brad Nailers Group	DURATION DAILY RA
→ RU00008-003		18 G Brad Nailer	DURATION DAILY RA
RU00008-004		18 G Brad Nailer	DURATION DAILY RA

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/11/2022 View Rental Calen

Document Date 4/11/2022 Rental Ledger Entries

External Document No. Metered Usage En

Rental Lines | Manage | **Line** | Function

Rental Amount Lines | View Rental Calen

Rental Ledger Entries | Metered Usage En

Rental Value Entries | Periodic Usage En

RU00008-004		18 G Brad Nail
-------------	--	----------------

Click on the cell **Unit Price Excl. Tax** with the value **20.00**

As the entered Rental Return Date and defaulted Rental Billing End Date falls within the Billing Schedule line with the From Date 5/10/2022 and To Date of 7/23/2022, then the Rental Rate of 20.00 is the daily rental rate that is used when billing the customer.

Rental Amounts

Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre... Code	Amount Including Tax
022 12:00 AM	4/11/2022 11:59 PM	1	20.00	20.00		20.4
022 12:00 AM	4/12/2022 11:59 PM	1	20.00	20.00		20.4
022 12:00 AM	4/13/2022 11:59 PM	1	20.00	20.00		20.4
022 12:00 AM	4/14/2022 11:59 PM	1	20.00	20.00		20.4
022 12:00 AM	4/15/2022 11:59 PM	1	20.00	20.00		20.4

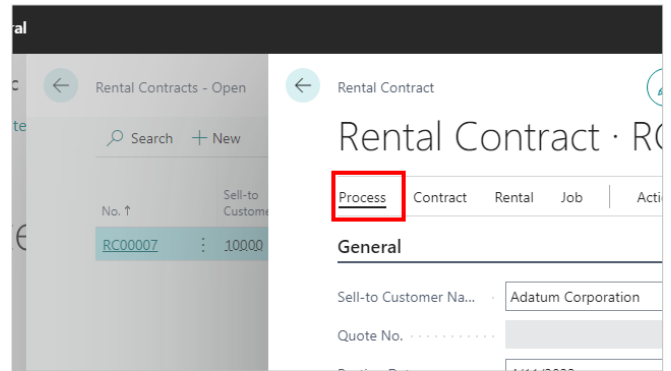
Click on the button **Close**

1	20.00	20.00	20.40
1	20.00	20.00	20.40
1	20.00	20.00	20.40
1	20.00	20.00	20.40
1	20.00	20.00	20.40
1	20.00	20.00	20.40
1	20.00	20.00	20.40

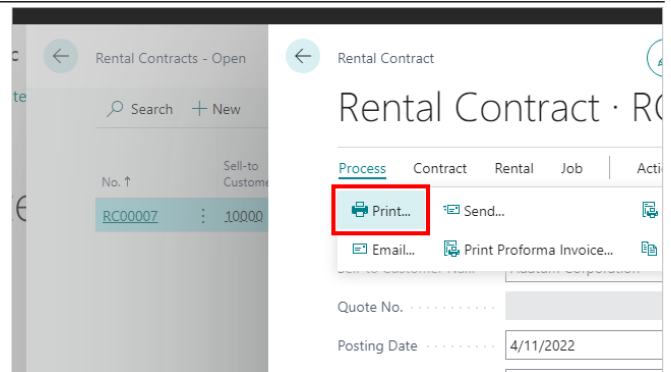
Close

Show less

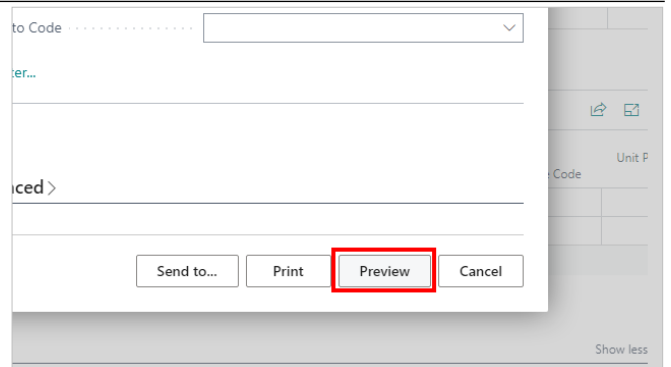
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Print...**



Click on the button **Preview**



The following picture of the Rental Contract document displays the pricing for the contract based on the duration of the rental.



CRONUS Rentals, Inc
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Contract

Page: 1

Rental Contract Number: RC00007

Rental Contract Date: 4/11/2022

Sell
To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship
To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number
Customer ID 10000
SalesPerson Jim Olive

Ship Via
Ship Method
Terms 1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00008	18 G Brad Nailers Group		2		
RU00008-003	18 G Brad Nailer	188N-003	1		660.00
Rental	Apr 11, 2022 to May 13, 2022		33 @ 20.00/ Daily Rental = 660.00		
RU00008-004	18 G Brad Nailer	188N-004	1		660.00
Rental	Apr 11, 2022 to May 13, 2022		33 @ 20.00/ Daily Rental = 660.00		

Amount Subject to Sales Tax USD 1,320.00
Amount Exempt from Sales Tax USD 0.00

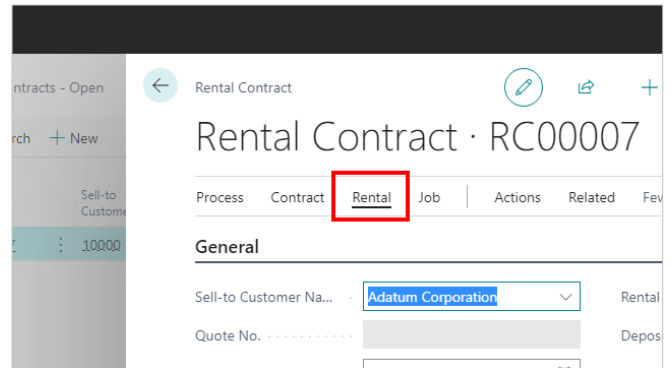
Subtotal: 1,320.00

Total Sales Tax: 26.40

Total USD: 1,346.40

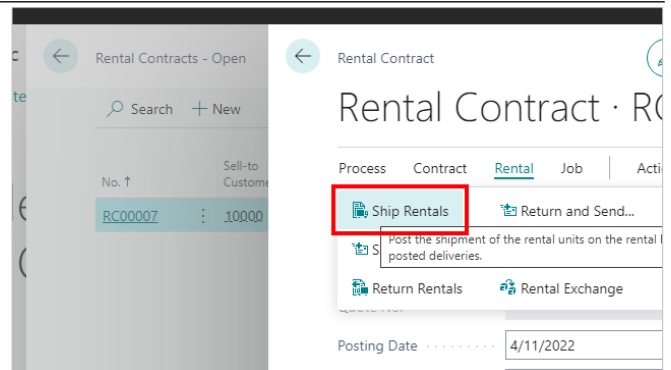
The following covers the shipment of the rental units.

Click on the navigation menu item popup **Rental**



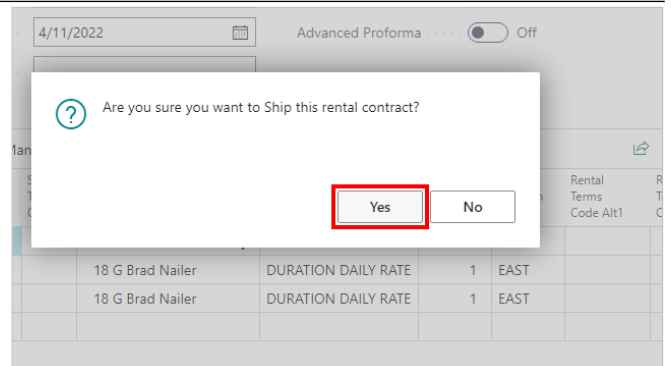
The screenshot shows the 'Rental Contract' screen for contract RC00007. The 'Rental' tab is highlighted in the navigation menu. The 'General' section shows 'Sell-to Customer Na...' as 'Adatum Corporation' and 'Quote No.' as a blank field.

Click on the navigation menu item **Ship Rentals**



The screenshot shows the 'Rental Contract' screen for contract RC00007. The 'Ship Rentals' button is highlighted in the 'Rental' tab. A tooltip for 'Ship Rentals' is visible, stating: 'Post the shipment of the rental units on the rental posted deliveries.' Other options like 'Return and Send...', 'Return Rentals', and 'Rental Exchange' are also visible.

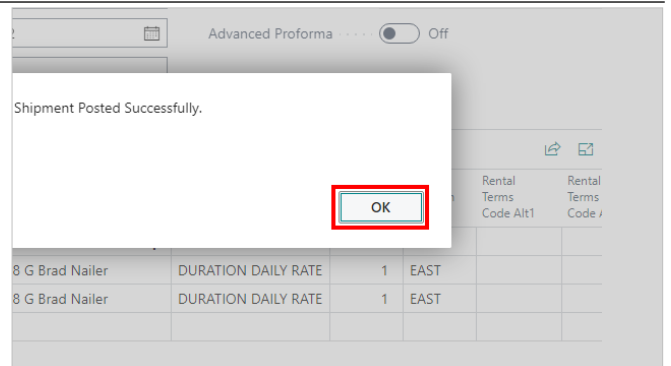
Click on the button **Yes**



The screenshot shows a confirmation dialog box with the question: 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted. The background shows a table with rental items.

18 G Brad Nailer	DURATION DAILY RATE	1	EAST	
18 G Brad Nailer	DURATION DAILY RATE	1	EAST	

Click on the button **OK**

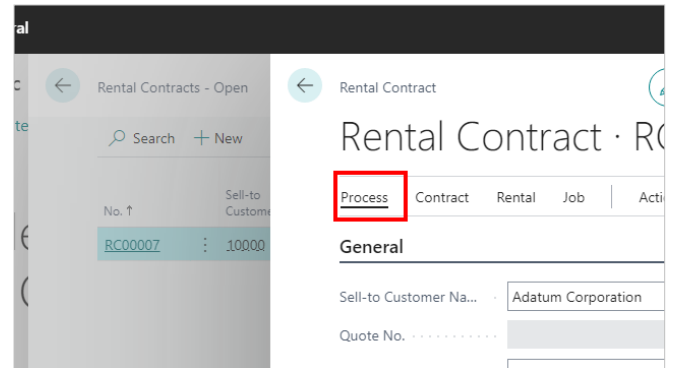


The screenshot shows a success message dialog box with the text: 'Shipment Posted Successfully.' The 'OK' button is highlighted. The background shows the same table as the previous screenshot.

8 G Brad Nailer	DURATION DAILY RATE	1	EAST	
8 G Brad Nailer	DURATION DAILY RATE	1	EAST	

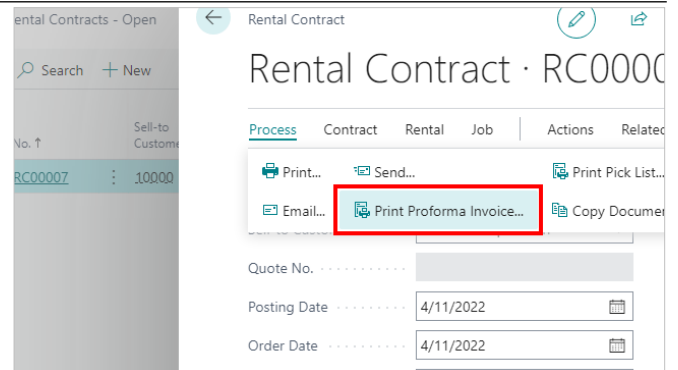
The following steps cover the previewing of the Proforma Invoice for invoicing the contract up to April 17.

Click on the navigation menu item popup **Process**



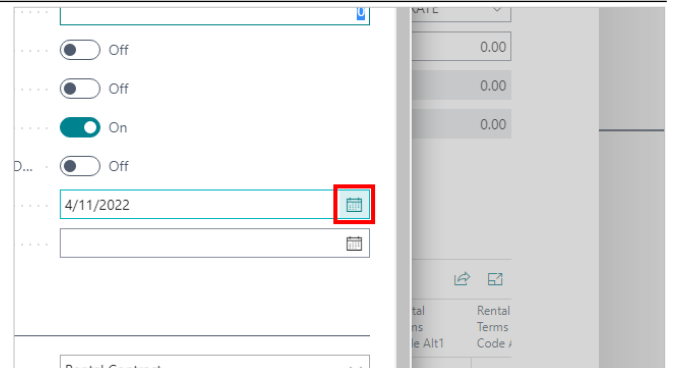
The screenshot shows the 'Rental Contract' screen. The 'Process' button is highlighted in a red box. The screen also displays the 'General' tab with fields for 'Sell-to Customer No.' (Adatum Corporation) and 'Quote No.'.

Click on the navigation menu item **Print Proforma Invoice...**



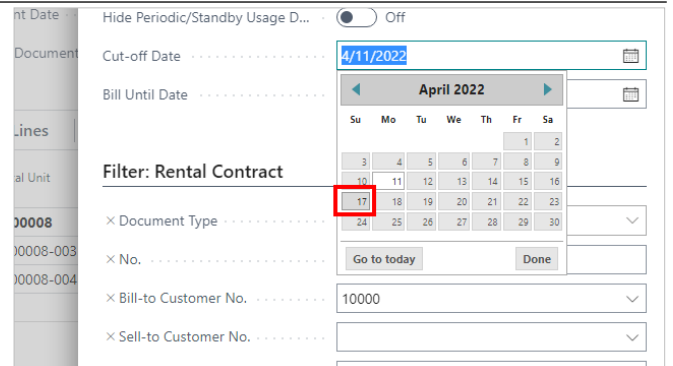
The screenshot shows the 'Rental Contract' screen with the 'Process' tab selected. The 'Print Proforma Invoice...' button is highlighted in a red box. Other buttons visible include 'Print...', 'Send...', 'Print Pick List...', 'Email...', and 'Copy Document'.

Click on the link **Open the date picker for Cut-off Date**



The screenshot shows the 'Rental Contract' screen with the 'Cut-off Date' field highlighted in a red box. The date '4/11/2022' is entered in the field.

Click on **17** in the calendar



The screenshot shows the 'Rental Contract' screen with the 'Cut-off Date' field highlighted in a red box. The date '4/11/2022' is entered in the field. Below the field, a calendar for April 2022 is displayed, with the date '17' highlighted in a red box.



Click on the button **Preview & Close**

A screenshot of a software interface. At the top, there are several input fields: "Sell-to Customer No." with a dropdown arrow, "Ship-to Code" with a dropdown arrow, and a "+ Filter..." button. Below these fields is a section titled "Filter: Rental Additional Note". At the bottom of the interface, there are four buttons: "Send to...", "Print", "Preview & Close", and "Cancel". The "Preview & Close" button is highlighted with a red rectangular box.

The following picture of the Proforma Invoice displays what the customer will be invoiced when the Posting Date is set to April 17 when posting the invoice.



CRONUS Rentals, Inc. 7122 South Ashford Street Westminster Atlanta, GA 31772			Rental Proforma		
			Page: 1		
			Rental Contract Number: RC00007		
			Rental Proforma Date: 4/17/2022		
Sell		Ship		P.O. Number	
To: Adatum Corporation		To: Adatum Corporation		Customer ID 10000	
Robert Townes		Robert Townes		SalesPerson Jim Olive	
192 Market Square		192 Market Square			
GA 31772		GA 31772		Ship Via	
				Ship Method	
				Terms 1 Month/2% 8 days	

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00008	18 G Brad Nailers Group		2		
RU00008-003	18 G Brad Nailer	188N-003	1		140.00
Rental	Apr 11, 2022 to Apr 17, 2022		7 @ 20.00/ Daily Rental = 140.00		
RU00008-004	18 G Brad Nailer	188N-004	1		140.00
Rental	Apr 11, 2022 to Apr 17, 2022		7 @ 20.00/ Daily Rental = 140.00		

Amount Subject to Sales Tax USD	280.00	Subtotal:	280.00
Amount Exempt from Sales Tax USD	0.00		
		Total Sales Tax:	5.60
		Total USD:	285.60

The following steps cover invoicing the contract up to April 17.




Click on the link **Open the date picker for Posting Date**


ess Contract Rental Job Actions Related Fewer options


General

Sell-to Customer Na... Adatum Corporation Rental Terms Code DURATION DA

Quote No. Deposit Amount

Posting Date 4/11/2022  Contract Total


Order Date 4/11/2022  Open the date picker for Posting Date

Document Date 4/11/2022  Advanced Proforma Off

External Document No.

Click on **17** in the calendar

Quote No. Deposit Am

Posting Date 4/11/2022  Contract To

Order Date

Document Date

External Document No.

April 2022

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Go to today Done

Rental Lines

Rental Unit No.	Text Code	Description	Rental Terms Cod
→ RU00008		18 G Brad Nailers Group	DURATION DA
RU00008-003		18 G Brad Nailer	DURATION DA

Click on the navigation menu item popup **Rental**

Contracts - Open

Search + New

Sell-to Customer 10000

Rental Contract

Rental Contract · RC00007

Process Contract **Rental** Job Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Invoice**

Rental Contract


Rental Contract · RC00007

Process Contract Rental Job Actions Related Fewer options

Ship Rentals Return and Send... **Invoice** Create Pro-Forma

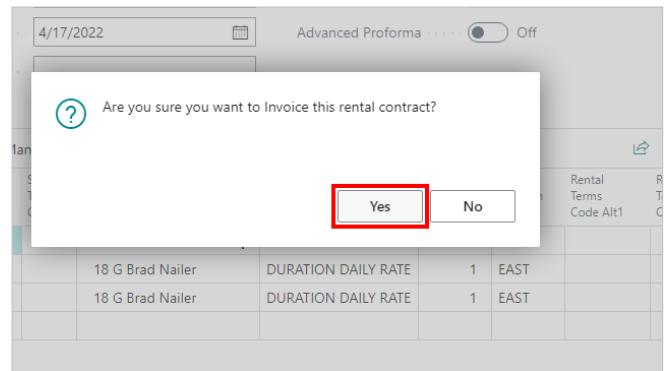
Ship and Send... Bulk Returns Invoice and Print Invoice Pro-Forma

Return Rentals Rental Exchange Invoice and Send... Posted Deliveries

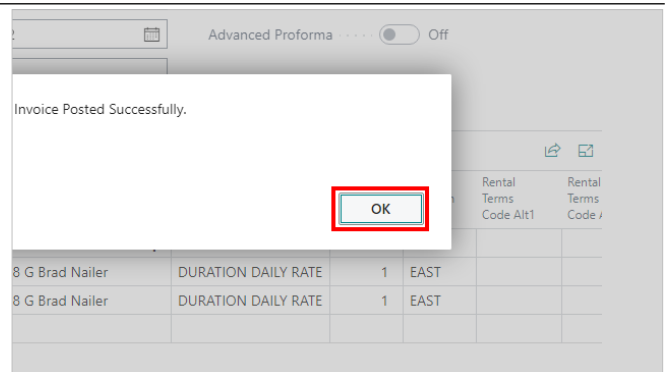
Posting Date 4/17/2022  Contract Total



Click on the button **Yes**



Click on the button **OK**



The following picture displays the Posted Rental Invoice for the posted invoice.



CRONUS Rentals, Inc
7122 South Ashford Street
Westminster
Atlanta, GA 31772

RENTAL INVOICE

Page: 1

Invoice Number: RI00003

Invoice Date: 4/17/2022

Bill

To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772
USA

Ship

To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772
USA

Customer ID 10000

P.O. Number

Rental Contract No. RC00007

SalesPerson Jim Olive

Due Date 5/17/2022

Terms 1 Month/2% 8 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
------------------	------	-----------	----------	------------	-------------

Rental Charges:

RU00008-003	18 G Brad Nailer	Serial No.: 188N-003			140.00
Rental	Apr 11, 2022 to Apr 11, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 12, 2022 to Apr 12, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 13, 2022 to Apr 13, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 14, 2022 to Apr 14, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 15, 2022 to Apr 15, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 16, 2022 to Apr 16, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 17, 2022 to Apr 17, 2022	1 @ 20.00 / Daily Rental = 20.00			
RU00008-004	18 G Brad Nailer	Serial No.: 188N-004			140.00
Rental	Apr 11, 2022 to Apr 11, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 12, 2022 to Apr 12, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 13, 2022 to Apr 13, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 14, 2022 to Apr 14, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 15, 2022 to Apr 15, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 16, 2022 to Apr 16, 2022	1 @ 20.00 / Daily Rental = 20.00			
	Apr 17, 2022 to Apr 17, 2022	1 @ 20.00 / Daily Rental = 20.00			

Amount Subject to Sales Tax USD	280.00	Subtotal:	280.00
Amount Exempt from Sales Tax	0.00		
		Total Sales Tax:	5.60
		Total USD:	285.60

Subsequent invoicing will be billed at the same daily rental rate.



3.7.4. How to Process User Defined Initial Billing & Run On Billing Methods

3.7.4.1. Overview

This example will demonstrate the processing of a Rental Contract using a User Defined Billing Term with the first line having a Billing Method of Initial Billing and the second line having a Billing Method of Run On.

When invoicing the first line is invoiced based on the Rental Term on the Initial Billing line, and then all subsequent invoicing is based on the Rental Term specified on the line with the Billing Method of Run On.

The following picture displays the User Defined Billing Term Lines of the IB FIXED-RUN ON EOM term that will be used in the example.

Lines		Manage								
Day From	Day To	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Fixed	Use Pricing From Setup		
0D	CM	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
→	:	Run On	MONTH-PEND-PRO-EOM	MONTH	MONTH	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

On Rental Management Setup the field, Use Unit Rental Term, has been enabled.

A rental group will be entered on the Rental Lines which has the User Defined Billing Term specified in the Rental Term field on the group card. Therefore, the term will default to the group Rental Line and update the child lines, Billing Schedules.

A Rental Return Date will be entered on the group line which will result in the final billing being for a partial rental period.

On the group rental line, Billing Schedule, a Rental Rate will be entered on the Initial Billing record, which will be used when invoicing at the end of the first month.

The Run On record will be modified by enabling the Use Pricing From Setup field. Therefore, the Rental Unit Price will be used from the Rental Price card setup on the group unit card, instead of entering a Rental Rate on the Billing Schedule line.

After the selection of the child units, the Rental Amount Lines will be reviewed.

The company will decide that they want to bill the partial rental period at a daily rental rate rather than the prorated amount calculated from the monthly rental price.

In order to bill the final partial period at a daily rental rate the Billing Schedule on the group will be modified. The Run On record To Date will be modified to the end date of the last full month period.

A new record will be added with a Billing Method of Final Billing, a daily rental term will be selected and a Rental Rate will be specified for invoicing the final partial period.

3.7.4.2. Processing a Contract with a User Defined Billing Term with



Initial Billing and Run-On Methods

Click on the navigation menu item **Rental Contract**

Packages Group Avail. Matrix Rental Avail. Calendar Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> Find entries...	> Re
+ Sales Order	+ Purchase Order	+ Rental Contract	> New	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental	Create a new rental contract for rental product an	

Click on the lookup button **Sell-to Customer Name**

Rental Contract

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na... Rental Terms Code

Quote No. Choose a value for Sell-to Customer Name

Posting Date Contract Total

Order Date Outstanding Amount

Document Date Advanced Proforma Off

Click on the link in cell **No.** with the value **10000**

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na... Rental Terms C

Quote No. No. Name ZIP

Posting Date 10000 Adatum Corporation 31

Order Date 20000 Select record "10000" 61

Document Date 30000 School of Fine Art 37

External Document No. 40000 Alpine Ski House 31

50000 Relecloud 31

+ New

Click on the cell **Rental Unit No.**

Contracts Shipments Due Today 0

Overdue Sales Invoice Amount
\$71,085
> See more

External Document No.

Rental Lines Manage Line Functions

Rental Unit No.	Stan... Text Code	Description

Sales Lines Manage More options



Click on the lookup button in the cell **Rental Unit No.**

Shipments Due Today: 0

Overdue Sales Invoice Amount: \$71,085

External Document No.:

Rental Unit No.	Stan... Text Code	Description	Rent
WI 2356 DELETE CHILD			

Sales Lines: Manage More options

Click on the link in cell **No.** with the value **RU00011**

Contracts Ship/Return

Shipments Due Today: 0

Overdue Sales Invoice Amount: \$71,085

No.	Description
RU00010	Framing Air Nailer Group
RU00010-001	Framing Air Nailer
RU00010-002	Framing Air Nailer
RU00010-003	Framing Air Nailer
RU00010-004	Framing Air Nailer
RU00010-005	Framing Air Nailer
RU00011	Power Shovel Group
RU00011-001	Select record "RU00011" shovel
RU00011-002	Power Shovel
RU00011-003	Power Shovel
RU00011-004	Power Shovel
RU00011-005	Power Shovel

Click on the cell **Rental Terms Code** with the value **IB FIXED-RUN ON EOM**

Document No.:

Unit	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rer Ten Co
11		Power Shovel Group	IB FIXED-RUN ON EOM	0		

Manage More options

Click on the cell **Rental Quantity** with the value **0**

Line Functions Related Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rer Ten Cox
Power Shovel Group	IB FIXED-RUN ON	0			

More options



ODT Rentals Online Help

Enter the text **2**.

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code
Power Shovel Group	IB FIXED-RUN ON EOM	2			

Click on the cell **Rental Return Date** with the value **4/30/2022**

The Rental Return Date is automatically set to the date in the To Date field on the Initial Billing record in the Billing Schedule. The date will be modified to the expected return date.

Init	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
11		4/11/2022		4/30/2022	4/11/2022	4/30/2022	0.00
		4/11/2022		4/30/2022	Type the date in the format M/d/yyyy		0.00
		4/11/2022		4/30/2022	4/11/2022	4/30/2022	0.00

If the rental is an indefinite rental the Rental Return Date can be cleared.

When the field, Default Blank Return Date, is enabled on Rental Management Setup the Rental Return Date will be blank.

Click on the link in cell **Rental Return Date** with the value **4/30/2022**

Init	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
11		4/11/2022		4/30/2022	4/11/2022	4/30/2022	0.00
		4/11/2022		4/30/2022	Open the date picker for Rental Return Date		0.00
		4/11/2022		4/30/2022	4/11/2022	4/30/2022	0.00

Click on the link **Next**

Init Start	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt1 Rental Unit Price
/2022		4/30/2022	4/11/2022	4/30/2022	0.00	0.00
/2022					0.00	0.00
/2022					0.00	0.00

April 2022

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30



Click on the link **Next**

Functions		Related		Fewer options		
Rental Start	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt1 Rental Unit Price
/2022		4/30/20	4/11/2022	4/30/2022	0.00	0.00
/2022		May 2022		22	0.00	0.00
/2022		Su Mo Tu We Th Fr Sa		22	0.00	0.00
		1 2 3 4 5 6 7				
		8 9 10 11 12 13 14				
		15 16 17 18 19 20 21				
		22 23 24 25 26 27 28				
		29 30 31				

Click on the link **Next**

Manage		Line		Functions		Related		Fewer options	
	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cur	
		4/30/20	4/11/2022	4/30/2022	0.00	0.00	0.00		
01		June 2022		22	0.00	0.00	0.00		
03		Su Mo Tu We Th Fr Sa		22	0.00	0.00	0.00		
		1 2 3 4							
		5 6 7 8 9 10 11							
		12 13 14 15 16 17 18							
		19 20 21 22 23 24 25							
		26 27 28 29 30							

Click on **3** in the calendar

Rental Unit No.		No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
→ RU00011			4/30/20	4/11/2022	4/30/2022	0.00
RU00011-001			July 2022		22	0.00
RU00011-003			Su Mo Tu We Th Fr Sa		22	0.00
			3	4 5 6 7 8 9		
			10 11 12 13 14 15 16			
			17 18 19 20 21 22 23			
			24 25 26 27 28 29 30			
			31			

Sales Lines Manage

Type No. Description Location Code

Go to today Done

Click on the navigation menu item popup **Line**

Posting Date 4/11/2022 Contract Total

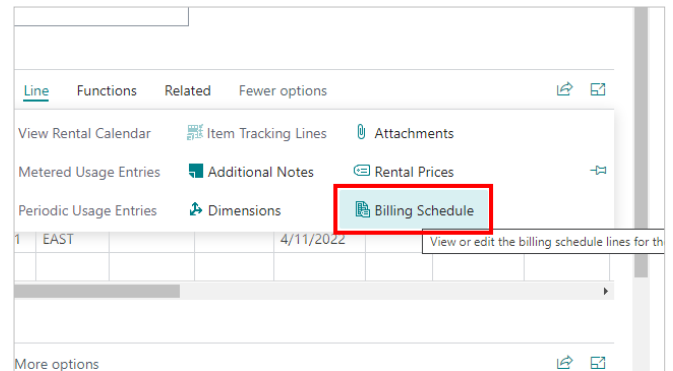
Order Date 4/11/2022 Outstanding Am

Document Date 4/11/2022 Advanced Profor

External Document No.

Rental Lines		Manage		Line		Functions		Related		Fewer options	
Rental Unit No.	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Sta Date						
→ RU00011	2				4/11/202						
RU00011-001	1	EAST			4/11/202						
RU00011-003	1	EAST			4/11/202						

Click on the navigation menu item **Billing Schedule**



The following picture displays the Billing Schedule for the group line which will be modified prior to posting any invoices by:

- Entering a Rental Rate on the Initial Billing, Fixed Fee End term record
- Checking the Use Pricing From Setup on the Run On record with the periodic end, prorated, end of month term

Edit - Rental Billing Schedules - Rental Contract · RC00008 · 10000 · 20000

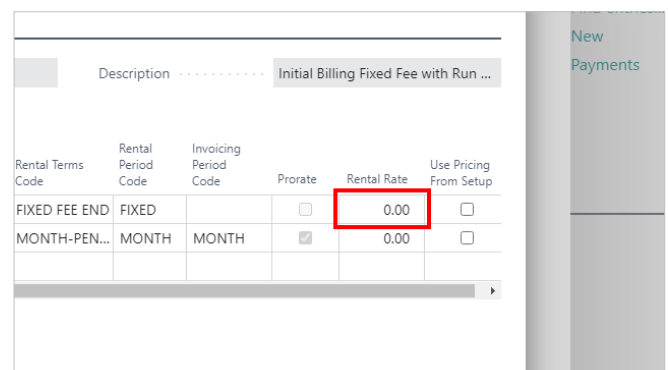
Manage

Billing Schedule

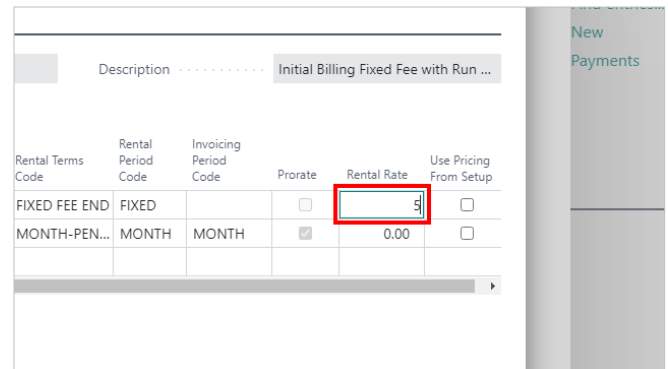
Code IB FIXED-RUN ON EOM Description Initial Billing Fixed Fee with Run ...

	From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
	4/11/2022	4/30/2022	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	0.00	<input type="checkbox"/>
→	5/1/2022	9/15/2049	Run On	MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>

Click on the cell **Rental Rate** with the value **0.00**

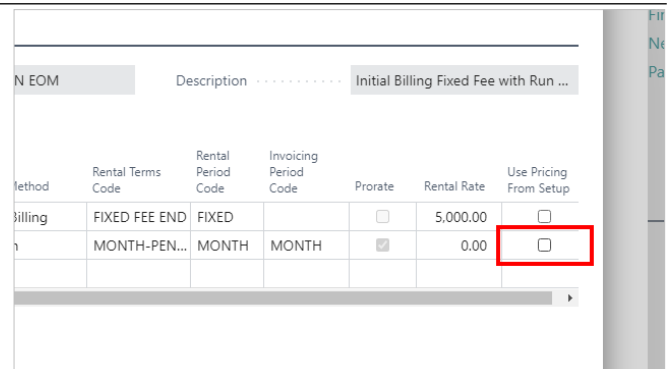


Enter the text **5000.00**.



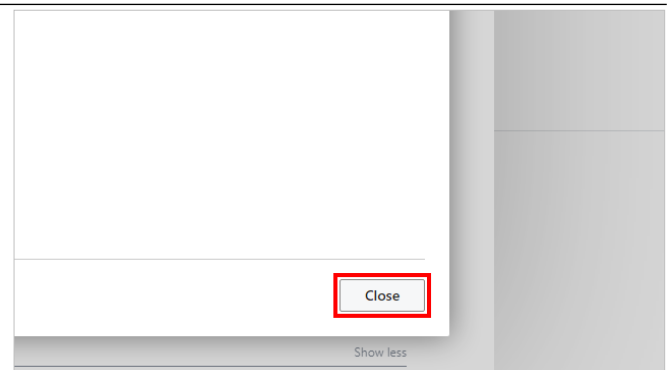
Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
FIXED FEE END	FIXED		<input type="checkbox"/>	5	<input type="checkbox"/>
MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>

Click on **Use Pricing From Setup**



Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	5,000.00	<input type="checkbox"/>
	MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>

Click on the button **Close**

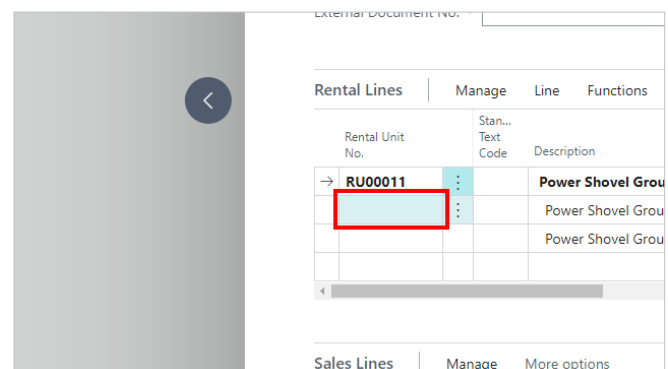


Close

- When invoicing at the end of April, the Rental Unit Price will be used from the Rental Rate field on the Billing Schedule, Initial Billing record.
- When invoicing subsequent rental periods, the Rental Unit Price will be used from the Rental Price card setup on the rental group unit.

The following steps cover the selection of the Rental Units on the group child lines and the reviewing of the Rental Amount Lines on a child line.

Click on the cell **Rental Unit No.**



Rental Unit No.	Text Code	Description
→ RU00011		Power Shovel Group
		Power Shovel Group
		Power Shovel Group



Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows a table with columns: Rental Unit No., Stan... Text Code, Description, and Rent. The first row has the value 'RU00011' in the Rental Unit No. column. A red box highlights the lookup button (three dots) in the same column. Below the table, there is a text input field with the placeholder 'Choose a value for Rental Unit No.' and a 'Group' label.

Click on the link in cell **No.** with the value **RU00011-001**

The screenshot shows a 'Rental Unit List' dialog box. It has a search bar and tabs for 'Rental' and 'Related'. The list contains the following items:

No. ↑	Description
→ RU00011-001	Power Shovel
RU00011-002	Power Shovel
RU00011-003	Power Shovel
RU00011-004	Power Shovel
RU00011-005	Power Shovel
RU00011-006	Power Shovel

Click on the cell **Rental Unit No.**

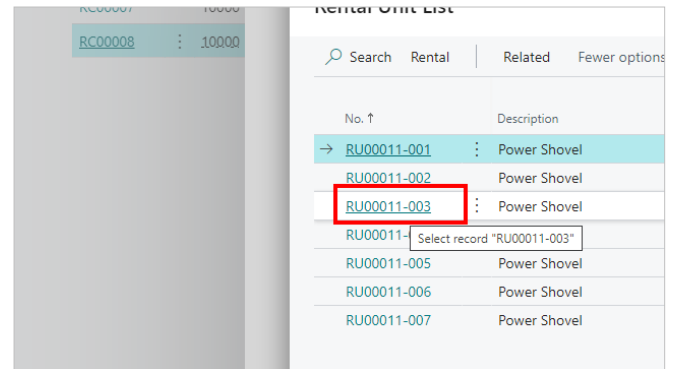
The screenshot shows the same 'Rental Lines' table as before. The 'Rental Unit No.' column now contains the value 'RU00011-001'. A red box highlights the cell containing this value.

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' table. The 'Rental Unit No.' column contains 'RU00011-001'. A red box highlights the lookup button (three dots) in the same column. Below the table, there is a text input field with the placeholder 'Choose a value for Rental Unit No.' and a 'Group' label.



Click on the link in cell **No.** with the value **RU00011-003**



No. ↑	Description
→ RU00011-001	Power Shovel
RU00011-002	Power Shovel
RU00011-003	Power Shovel
RU00011-	Select record "RU00011-003"
RU00011-005	Power Shovel
RU00011-006	Power Shovel
RU00011-007	Power Shovel

The following picture displays the Rental Amount Lines for the unit RU00011-001.



Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.	Total Days
Rental	4/11/2022 12:00 AM	4/30/2022 11:59 PM	1	5,000.00	5,000.00		5,100.00	SUPPLIES	4/30/2022	<input type="checkbox"/>		
Rental	5/1/2022 12:00 AM	5/31/2022 11:59 PM	1	9,000.00	9,000.00		9,180.00	SUPPLIES	5/31/2022	<input type="checkbox"/>		
Rental	6/1/2022 12:00 AM	6/30/2022 11:59 PM	1	9,000.00	9,000.00		9,180.00	SUPPLIES	6/30/2022	<input type="checkbox"/>		
Rental	7/1/2022 12:00 AM	7/3/2022 11:59 PM	0.09677	9,000.00	870.97		888.39	SUPPLIES	7/3/2022	<input checked="" type="checkbox"/>		

The first record contains what will be billed for the Initial Billing, Fixed Fee billing schedule line.

The second and third records contain what will be billed for the Run On, Monthly Periodic End of Month term for May and June.

The last record contains the amount to be billed for the partial rental period.

The Extended Quantity for July 1 to 3 is calculated as 3 days divided by 31 days in July = 0.09677, which is displayed as a rounded amount.

The Line Amount Excl. Tax is based on a prorated daily rate times the number of days to be billed in the partial rental period.

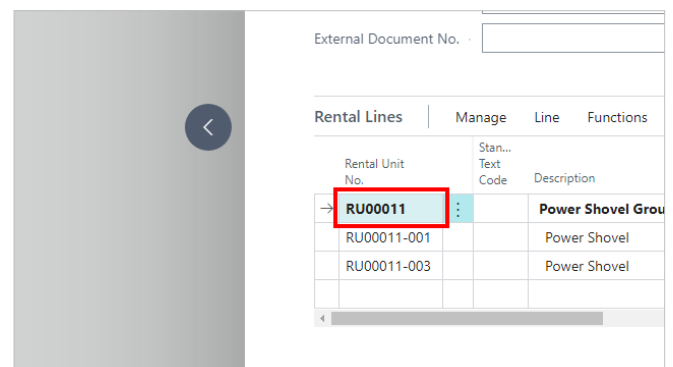
The prorated daily rate is calculated as the Unit Price Excluding Tax of 9,000.00 divided by 31 days = 290.3225806.

The Line Amount Excl. Tax is calculated as 290.3225806 times 3 days = 870.87.

In this example the company wants to charge a specific daily rate for the three days of July 1 to July 3 rather than the prorated daily rate.

The following demonstrates the modification of the Run On line and the addition of a new Final Billing line on the rental group unit line which updates the Billing Schedules on the child unit lines.

Click on the cell **Rental Unit No.** with the value **RU00011**



Rental Unit No.	Stan... Text Code	Description
→ RU00011		Power Shovel Group
RU00011-001		Power Shovel
RU00011-003		Power Shovel

Click on the navigation menu item popup **Line**

Posting Date 4/11/2022 Contract Total

Order Date 4/11/2022 Outstanding Am

Document Date 4/11/2022 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ RU00011 ...		Power Shovel Group	IB FIXED-RUN ON E
RU00011-001		Power Shovel	IB FIXED-RUN ON E
RU00011-003		Power Shovel	IB FIXED-RUN ON E

Click on the navigation menu item **Billing Schedule**

Line | Functions | Related | Fewer options

View Rental Calendar | Item Tracking Lines | Attachments

Metered Usage Entries | Additional Notes | Rental Prices

Periodic Usage Entries | Dimensions | **Billing Schedule**

Power Shovel | IB FIXED-RUN ON EOM | View or edit the billing schedule lines for the

More options

Click on the cell **To Date** with the value **9/15/2049**

Code IB FIXED-RUN ON EOM Desc

From Date	To Date	Billing Method	Rental Terms Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END F
→ 5/1/2022	9/15/2049	Run On	MONTH-PEN... N

Type the date in the format M/d/yyyy

Enter **To Date**.

Code IB FIXED-RUN ON EOM Desc

From Date	To Date	Billing Method	Rental Terms Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END F
→ 5/1/2022	9/15/2049	Run On	MONTH-PEN... N



ODT Rentals Online Help

Click on the cell **From Date**

RC00008 : 10000 Code IB FIXED-RUN ON EOM

From Date	To Date	Billing Method
4/11/2022	4/30/2022	Initial Billing
→ 5/1/2022	30/2022	Run On

Enter **From Date**.

RC00008 : 10000 Code IB FIXED-RUN ON EOM

From Date	To Date	Billing Method
4/11/2022	4/30/2022	Initial Billing
5/1/2022	6/30/2022	Run On
→ 6/1/2022		Run On

June 2022

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Click on the cell **To Date**

: 10000 Code IB FIXED-RUN ON EOM Desc

From Date	To Date	Billing Method	Rental Terms Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END F
5/1/2022	6/30/2022	Run On	MONTH-PEN... N
→ 7/1/2022		Run On	

June 2022 Type the date in the format M/d/yyyy

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Enter **To Date**.

: 10000 Code IB FIXED-RUN ON EOM Desc

From Date	To Date	Billing Method	Rental Terms Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END F
5/1/2022	6/30/2022	Run On	MONTH-PEN... N
→ 7/1/2022		Run On	



Click on the cell **Billing Method**

Code		IB FIXED-RUN ON EOM		Description	
From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Inv Period Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END	FIXED	
5/1/2022	6/30/2022	Run On	MONTH-PEN...	MONTH	MC
→ 7/1/2022	7/3/2022	Run On			

Click on the item **Final Billing** in the list

From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Inv Period Code
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END	FIXED	
5/1/2022	6/30/2022	Run On	MONTH-PEN...	MONTH	MC
→ 7/1/2022	7/3/2022	Run On			

Initial Billing

Run On

Fixed

Duration Based

Final Billing

Final Billing

Click on the cell **Rental Terms Code**

Code		IB FIXED-RUN ON EOM		Description		Initial Billing	
From Date	To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	
4/11/2022	4/30/2022	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	
5/1/2022	6/30/2022	Run On	MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	
7/1/2022	7/3/2022	Final Billing				<input type="checkbox"/>	

Click on the lookup button in the cell **Rental Terms Code**

Code		IB FIXED-RUN ON EOM		Description		Initial Billing		Fixed Fee	
To Date	Billing Method	Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate			
4/30/2022	Initial Billing	FIXED FEE END	FIXED		<input type="checkbox"/>	5,000.00			
6/30/2022	Run On	MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00			
7/3/2022	Final Billing				<input type="checkbox"/>	0.00			

Choose a value for Rental Terms Code



ODT Rentals Online Help

Click on the link in cell **Code** with the value **DAILY-PEND**

4/11/2022 4 Hour Rental - End Billing ☐

8 HR 8 Hour Rental - End Billing ☐

DAILY-PEND Daily Rental - Per. Billing in Arrears Summa... ☐

DAY-END Select record "DAILY-PEND" billing at End of Contract ☐

Select from full list

Click on the cell **Rental Rate** with the value **0.00**

Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
FIXED FEE END	FIXED		<input type="checkbox"/>	5,000.00	<input type="checkbox"/>
MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00	<input checked="" type="checkbox"/>
DAILY-PEN ▾	DAY	DAY	<input type="checkbox"/>	0.00	<input type="checkbox"/>

Enter **Rental Rate**.

Rental Terms Code	Rental Period Code	Invoicing Period Code	Prorate	Rental Rate	Use Pricing From Setup
FIXED FEE END	FIXED		<input type="checkbox"/>	5,000.00	<input type="checkbox"/>
MONTH-PEN...	MONTH	MONTH	<input checked="" type="checkbox"/>	0.00	<input checked="" type="checkbox"/>
DAILY-PEN ▾	DAY	DAY	<input type="checkbox"/>	20.00	<input type="checkbox"/>

Click on the button **Close**

Close

Show less

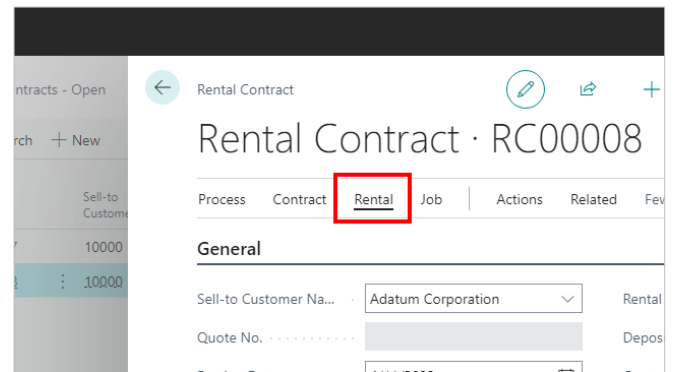
The following picture displays the Rental Amount Lines after the modifications to the Billing Schedule lines.
Note that July 1, 2 and 3 are now individual lines with a Unit Price Excl. Tax of 250.00.

View - Rental Line Rental Amounts

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date ↑
Rental	4/11/2022 12:00 AM	4/30/2022 11:59 PM	1	5,000.00	5,000.00		5,100.00	SUPPLIES	4/30/2022
Rental	5/1/2022 12:00 AM	5/31/2022 11:59 PM	1	9,000.00	9,000.00		9,180.00	SUPPLIES	5/31/2022
Rental	6/1/2022 12:00 AM	6/30/2022 11:59 PM	1	9,000.00	9,000.00		9,180.00	SUPPLIES	6/30/2022
Rental	7/1/2022 12:00 AM	7/1/2022 11:59 PM	1	250.00	250.00		255.00	SUPPLIES	7/1/2022
Rental	7/2/2022 12:00 AM	7/2/2022 11:59 PM	1	250.00	250.00		255.00	SUPPLIES	7/2/2022
Rental	7/3/2022 12:00 AM	7/3/2022 11:59 PM	1	250.00	250.00		255.00	SUPPLIES	7/3/2022

The following steps cover the shipping of the Rental Units.

Click on the navigation menu item popup **Rental**



Rental Contract · RC00008

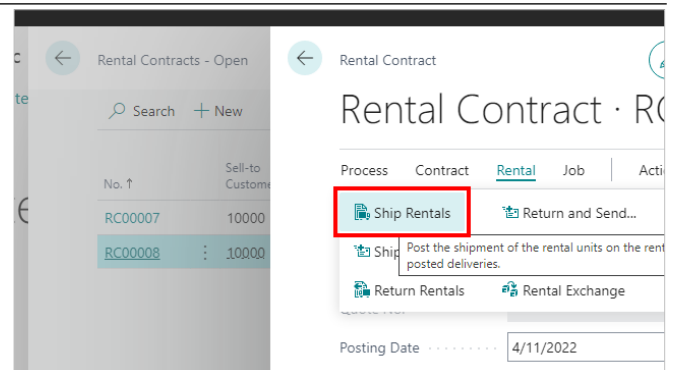
Process Contract **Rental** Job Actions Related Fev

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Ship Rentals**



Rental Contract · RC

Process Contract Rental Job Acti

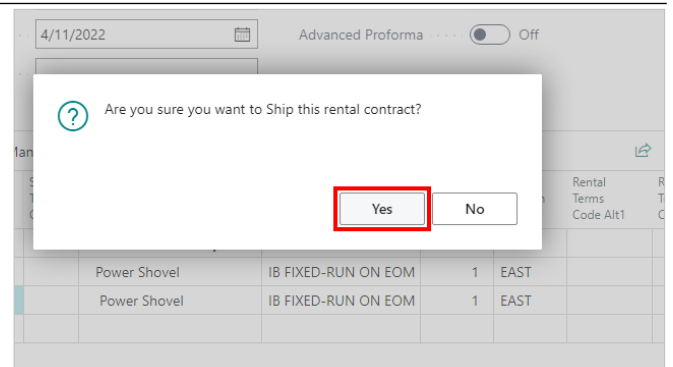
Ship Rentals Return and Send...

Post the shipment of the rental units on the rent posted deliveries.

Return Rentals Rental Exchange

Posting Date 4/11/2022

Click on the button **Yes**



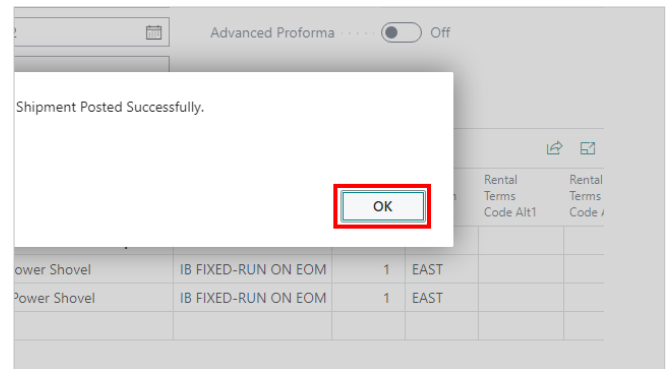
Are you sure you want to Ship this rental contract?

Yes No

Power Shovel IB FIXED-RUN ON EOM 1 EAST

Power Shovel IB FIXED-RUN ON EOM 1 EAST

Click on the button **OK**



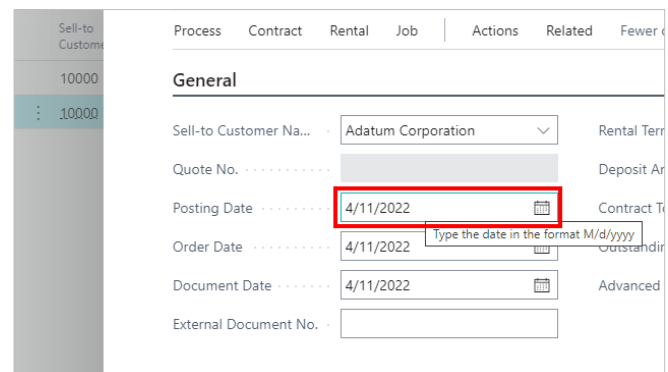
The invoicing process is the same as when using a single Rental Term on the Rental Lines.

The following steps cover the invoicing of the Initial Billing of the Fixed Fee for April 30.

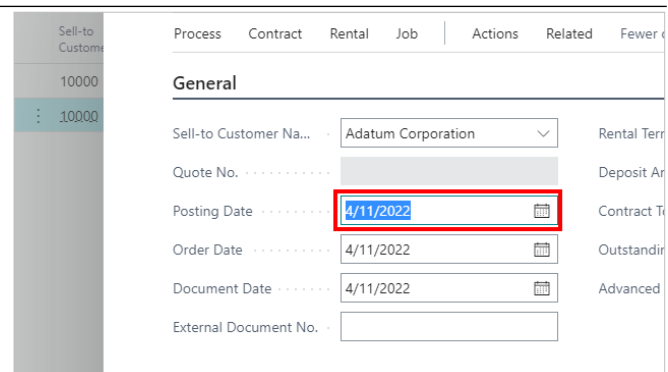
The steps for invoicing the 2 subsequent months, May 31 and June 30 and the Final Billing of the three days ending July 3 are the same steps.

The only difference is that the Posting Date must be set to the applicable date when invoicing.

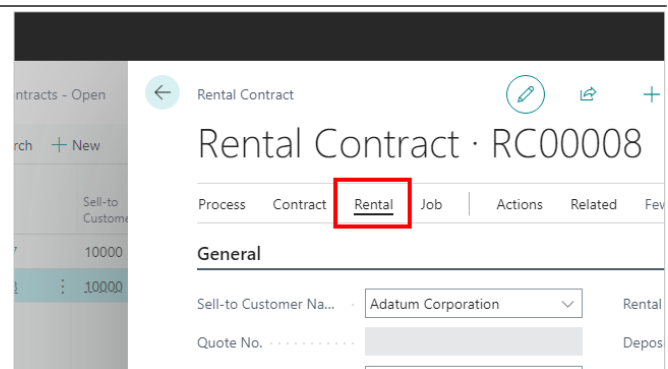
Click on the field **Posting Date**



Enter the text **04302022**.



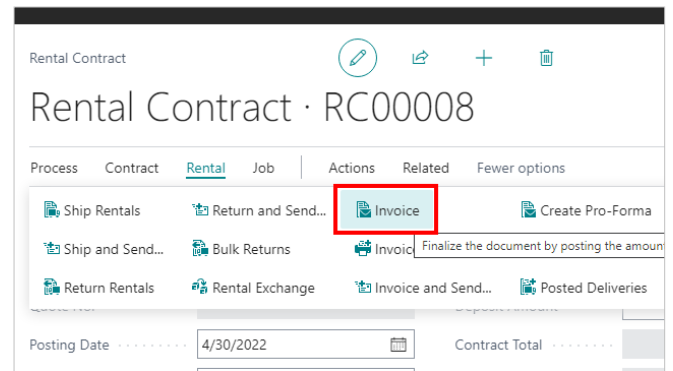
Click on the navigation menu item popup **Rental**



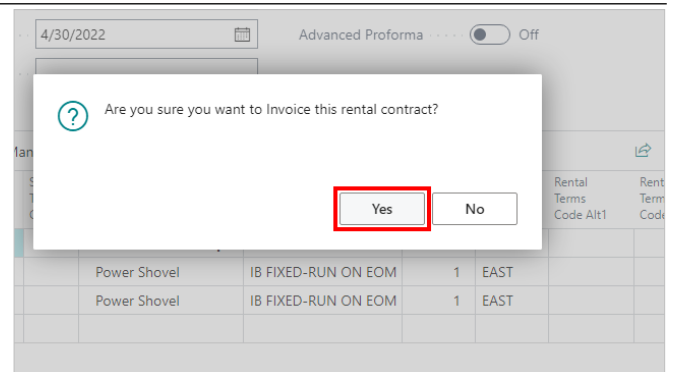


Click on the navigation menu item **Invoice**

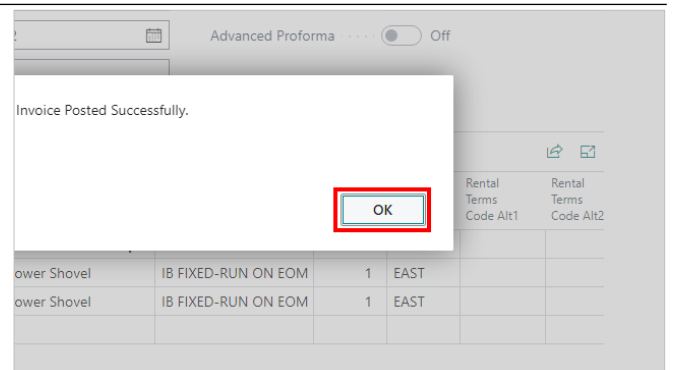
Optionally select Invoice and Email or Invoice and Send.



Click on the button **Yes**

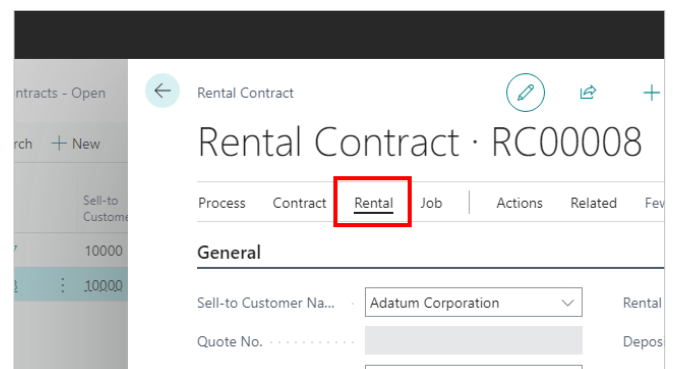


Click on the button **OK**



The following steps demonstrate how the Posted Rental Invoice can be viewed or printed directly from the contract.

Click on the navigation menu item popup **Rental**





Click on the navigation menu item **Posted Invoices**

The screenshot shows a software interface with a navigation menu. The 'Posted Invoices' option is highlighted with a red rectangle. Other options visible include 'Invoice', 'Create Pro-Forma', 'Posted Returns', 'Invoice and Print', 'Invoice Pro-Forma', 'Posted Invoices', 'Invoice and Send...', and 'Posted Deliveries'. Below the menu, there is a summary table with the following data:

Field	Value
Contract Total	48,696.78
Outstanding Amount	48,696.78

Once the invoicing has been completed for the contract, then the Rental Units will need to be returned. The following steps demonstrate the returning of the units using the Bulk Return functionality.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the Rental Units are or were returned on.

The screenshot shows a 'General' tab in a software interface. The 'Posting Date' field is highlighted with a red rectangle and contains the value '7/3/2022'. Other fields visible include 'Sell-to Customer Na...', 'Quote No.', 'Order Date' (4/11/2022), 'Document Date' (7/3/2022), and 'External Document No.'.

Click on the navigation menu item popup **Rental**

The screenshot shows a 'Rental Contract' screen with the title 'Rental Contract · RC00008'. The 'Rental' tab in the navigation menu is highlighted with a red rectangle. Other tabs visible include 'Process', 'Contract', 'Job', 'Actions', 'Related', and 'Fewer'. The 'General' tab is active, showing fields for 'Sell-to Customer Na...', 'Quote No.', and 'Posting Date'.

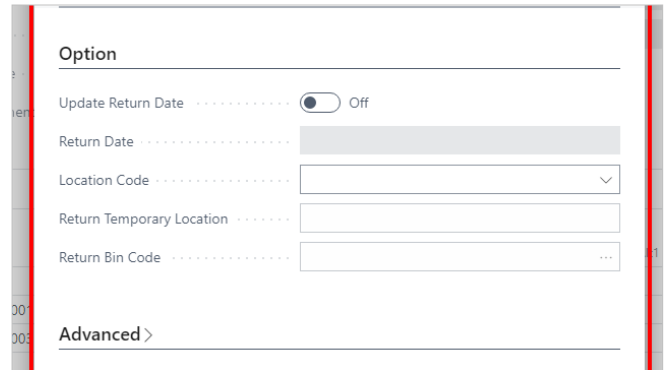
Click on the link **Bulk Returns**

The screenshot shows a 'Rental Contract' screen with the title 'Rental Contract · RC00008'. The 'Bulk Returns' link in the 'Rental' tab is highlighted with a red rectangle. Other links visible include 'Ship Rentals', 'Return and Send...', 'Invoice', 'Ship and Send...', 'Return Rentals', 'Invoice and Print', and 'Updates Qty. To Return for all rental lines with'. The 'Posting Date' field is set to '7/3/2022' and the 'Order Date' is '4/11/2022'.

ODT Rentals Online Help

Click on **ODT Bulk Return**

On the ODT Bulk Return page no settings are needed as the Rental Units will be returned on the date specified on the Rental Return Date field and be returned to the same Location as shipped from.

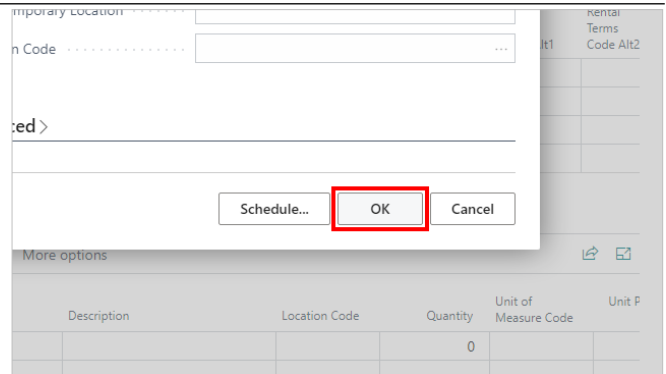


The screenshot shows a form titled "Option" with the following fields:

- Update Return Date: ☐ Off
- Return Date:
- Location Code:
- Return Temporary Location:
- Return Bin Code:

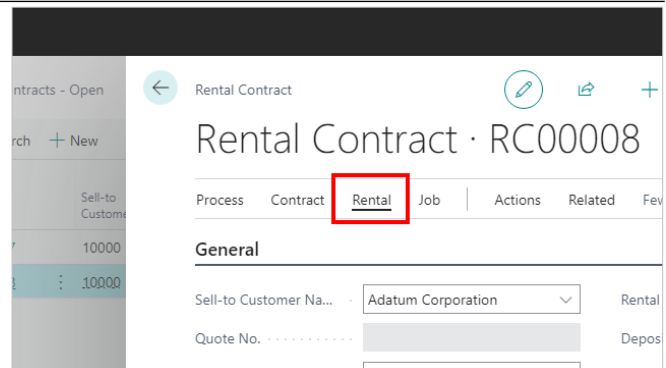
At the bottom, there is an "Advanced >" link.

Click on the button **OK**



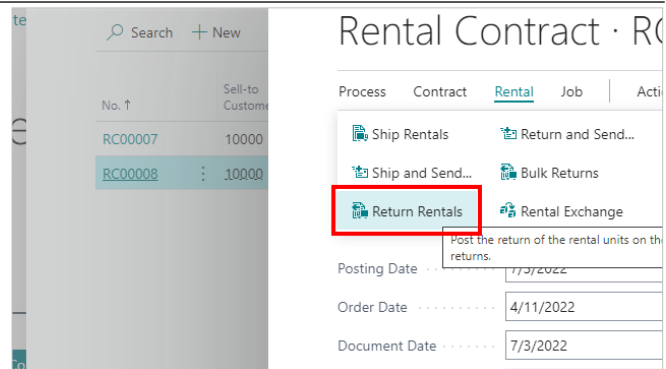
The screenshot shows the same form as above, but with the "OK" button highlighted in a red box. The "Schedule..." and "Cancel" buttons are also visible.

Click on the navigation menu item popup **Rental**



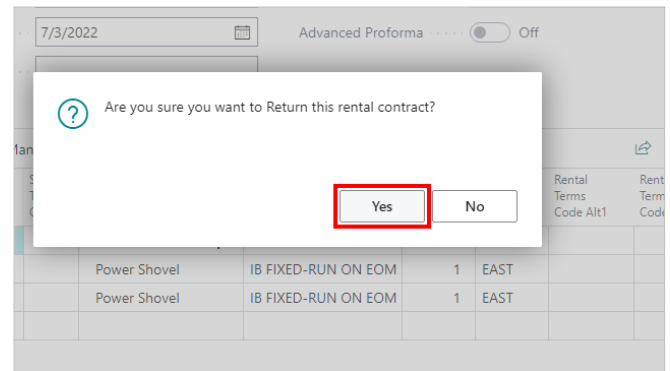
The screenshot shows the "Rental Contract" page for "RC00008". The "Rental" tab is highlighted in a red box. The page includes a "General" section with fields for "Sell-to Customer Name" (Adatum Corporation) and "Quote No.".

Click on the navigation menu item **Return Rentals**

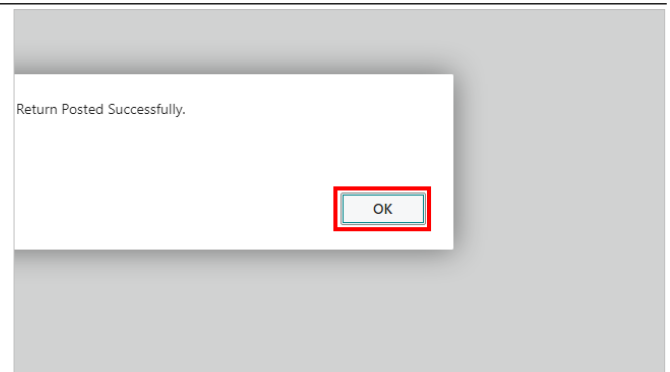


The screenshot shows the "Rental Contract" page for "RC00008". The "Return Rentals" option is highlighted in a red box. The page includes a "Posting Date" field (7/3/2022) and an "Order Date" field (4/11/2022).

Click on the button **Yes**



Click on the button **OK**



3.8. Rental Contracts with Units Linked to Items

3.8.1. Processing Rentals with Units Linked to Items Overview

3.8.1.1. Overview

The Rentals ensures when a unit is linked to an item that Item Ledger Entries are created when units are rented out and returned. Thus ensuring that the Item Availability provides a clear picture as to the location of the item quantity on items linked to Rental Units.

ODT Rentals provides an Rental Inventory Availability matrix, which provides a list of Items linked to Rental Units and the projected available balance quantity of the Item that is available to rent out.

To learn about the Rental Inventory Availability matrix, see ODT Rental Online Help, Processing Rentals, Processing Rentals Overview.

When a unit that is linked to an item is entered on a Rental Quote with Commit Reservation checked, or on a Rental Contract, Transfer Orders will be created, but will not be posted.

Both the shipment and receipt of the Transfer order will be posted, when from the Rental Contract, the Ship Rentals is ran. This posting will transfer the item between the location where rented from to another location, which is to be used for when the item/unit is out on rent.

On the Rental Line, the additional field of ODT Transfer Order No., contains the Transfer Order No and provides the ability to open the Transfer Order when the number is clicked on. Once the Ship Rentals has been ran, the lookup is no longer available as the Transfer Order will have been shipped and received.

By default on return of the unit, the item will be transferred back to the location from which it was rented. This feature will also occur should the rental line with the unit be deleted from the quote or contract, instead of being shipped, invoiced and returned.



ODT Rentals Online Help

Rental Units can be returned to a different or temporary rental location, and on return the item as well will be returned to the same location.

To learn about returning Rental Units with Items linked to the unit to a different or temporary location, see ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location.

The Transfer Order general tab has been modified to include a new field, Rental Transfer Order that is automatically enabled, when the order was created from a rental quote or contract.

When this field is enabled, users cannot modify the key fields on the General tab, nor can the lines be modified. In addition, the Transfer order be deleted or posted directly from the Transfer Order. The posting of the Transfer Order shipment and receipt occurs when on the rental contract, the Ship Rentals is ran.

The setups for rentals, when units are linked to items is conditional on whether on Inventory Setup, the Location Mandatory field has been enabled or not.

The use of Locations with Rentals has unique conditions when Rental Units are linked to Inventory Items.

When Rental Units are linked to an Inventory Item, then the Rental Unit card will not have a Location specified, even when Rental Management Setup has the Location Mandatory field enabled.

Inventory Locations functionality and availability handle the use of Locations in conjunction with the Rental Unit linked to an Item.

For additional information, please review ODT Rentals Online Help, How to Setup Rental Locations. Review the How to Setup an Inventory Location and How to Setup an Inventory Rentals In-Transit Location.

When entering a unit on rental lines, the Item Availability and Rental Unit Reservations Entries will control the Rental Quantity that can be shipped for the unit on the line.

ODT Rentals provides a report, Shortage List, to determine whether there are any shortages for any Rental Contract, Rental Lines, which can be ran for all contracts or from a Rental Contract just for that contract. Should there be any shortages, the functionality to resolve shortages directly from the Rental Contract is also provided.

For additional information, please review ODT Rentals Online Help, Processing Rentals, Resolving Rental Shortages.

The entry and processing steps on the Rental Quote and Rental Contract are the same as standard rental processing when the item does not have Serial No. tracking, Lot No, tracking or are stored in Bins.

The entry of units linked to items with Serial No. and/or Lot No. tracking requires the selection of the Item Tracking Entries for the Serial Nos. and/or Lot Nos. in the Item Tracking Entries. The Item Tracking Entries are accessed from the Rental Line menu option, Line, Item Tracking Lines.

The Transfer Order, Item Tracking Entries will be updated when the Serial Nos. and/or Lot Nos. are selected and the Item Tracking Entries page is closed.

The posting of the rental unit shipment will automatically post the Transfer Order, updating the inventory.

The entry of units linked to items which are in a rental location that has Bin Mandatory enabled, will by default populate the Bin Code field on the rental line, with the default Bin Code. The Bin Code field is an additional field available to add to the rental line using Personalize.



The Bin Code can be overridden to specify the Bin the item is to be shipped from. The Transfer-From Bin Code and Transfer-To Bin Code fields on the Transfer Order will be updated with the Bin Code from the rental line.

The Transfer-From Bin Code and Transfer-To Bin Code fields are available to add to the Transfer Order lines using Personalize.

At times there may be a requirement to ship or return only a portion of the Rental Quantity on the rental line, when an Item is linked to a Rental Unit.

To learn about partially shipping and partially returning Rental Units that are linked to Items, see ODT Rental Online Help, Processing Rentals, Partial Shipments and Returns.

NOTE:

When an organization is using Rental Quotes and enters a Rental Unit linked to an Item, a Transfer Order is not automatically created. A Transfer Order will be created for the Item when Make Contract is ran, which will then reserve the Item.

Should the organization wish to reserve the Item on the entry of the unit linked to the Item on a quote, then the Commit Reservation box must be checked. This will create the Transfer Order. The Transfer Order No. remains the same, when the Make Contract is ran. If the Commit Reservation box is subsequently cleared, prior to running Make Contract, then the Transfer Order is deleted. Upon running the Make Contract a new Transfer Order will be created.

3.8.2. How to Process Contracts When Units are Linked to Items

3.8.2.1. Overview

The following examples demonstrate the processing of Rental Contracts with Rental Units linked to Items when the Transfer Orders created are direct transfers and indirect transfers.

The Item linked to the Rental Unit in the examples is not serialized, nor is it stored in Bins.
On Rental Management Setup, Location Mandatory is enabled.

3.8.2.2. Processing Contracts Without In-Transit Locations

Profile - Sales Order Processor

Basically the same steps can be used should the user have the Business Manager Profile assigned.

The purpose of the following chapter is to display the impact on the Item which has been linked to a Rental Unit, and the unit is rented out creating direct transfers for the items.

On Inventory Setup, Location Mandatory is not enabled, and on Rental Management Setup, the Location Mandatory is enabled.

Included is a review of the Item Ledger Entries, Posted Transfer Shipment and the Item Availability when the unit is entered on a contract and when the unit is returned.

The setups completed for this example include:



- Creation of an Item to link to a Rental Unit
- Purchasing the item, with selecting a Rental Location on the line
- Creation of a Rental Unit and linking it to the Item created
- Adding Rental Prices to the Rental Unit that was created
- Creating a new Location for where the Item will be transferred to, when entered on the Rental Line and the Location has been specified
- Adding the new Location to the Rental Management Setup, Inventory Rentals Location field

In this example, a location called RENTRESERV has been created and added to the Rental Management Setup, Inventory Rental Location field.

This is the location that the item will be transferred to, when the unit linked to an item is entered on a rental line, and the Location Code field is populated.

Click on the navigation menu item **Rental Contract**

ed Documents Setup & Extensions

Transfer Orders Rental Quotes Rental Contracts Rental Periods Rental Terms

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order
- + Sales Return Order
- + Sales Credit Memo
- + Rental Quote
- + Rental Contract
- + Rental

> Tasks

> Sales

> Reports

Create a new rental contract for rental product

Click on the field **Sell-to Customer Name**

Rental Actions Navigate Less options

Proforma

Ext

Ren

Dep

Cor

Out

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**

Print... Print Proforma

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Current Date

NO. NAME CITY

10000	Adatum Corporation	At
20000	Trey Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Rental Lines Manage More options + New



Click on the cell **Rental Unit No.**

Rental Lines

[Manage](#) More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines

[Manage](#) More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **PG-001**

CRON

Search

New

Expand All

Collaps

manage

Edit

View

RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	

Click on the cell **Rental Terms Code**

If the Rental Term is to be different than the one that
defaulted from the Rental Unit, then lookup and select
the applicable term.

[Manage](#) More options

Delete Line

Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Portable Generators	MONTH-END	1	

Manage

UNIT OF



ODT Rentals Online Help

Click on the cell **Rental Quantity**

More options					
Group Avail Matrix					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Portable Generators	MONTH-END	1		
UNIT OF					

Enter the text **4**.

More options					
Group Avail Matrix					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Portable Generators	MONTH-END	4		
UNIT OF					

Click on the cell **Location Code**

s					
vail Matrix					
ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALTI2
generators	MONTH-END	4			4/
UNIT OF					

Click on **Code = EAST, Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALTI2	RENTAL START DATE
ors	MONTH-END	4			4/9/2018
CODE					
EAST					
NAME					
East Warehouse					
RE Select record "EAST"					
Inventory Items Rev					
WEST					
West Warehouse					
U + New					
LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	

Should there not be sufficient quantity of the item in inventory at the specified location, then this must be corrected in order to ship the rental unit from the contract, and to ensure the Item Availability displays the correct amounts.

If the Location selected is correct, then either a transfer or purchase must be made to that Location. Alternatively, the Rental Quantity could be reduced on the contract.

The shortage can be addressed directly from the rental contract.

To learn about resolving rental shortages, see ODT Rental Online Help, Processing Rentals, Resolving Rental Shortages.



Click on the cell **Rental Return Date**

Should the expected date of return of the unit be different than the automatically populated date, then enter or look-up and select the expected Rental Return Date.

RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
▼		4/9/2018	5/8/2018	500.00	0.00
Type the date in the format M/d/yyyy					
LINE AMOUNT					

Click on the link in cell **ODT Transfer Order No.** with the value **1006**

When clicking on the ODT Transfer Order No., the created Transfer Order will automatically open. However, the order cannot be edited or posted by users directly from the order. All changes to the quantity, Location, etc. are done on the Rental Contract, which updates the Transfer Order.

0.00	
QTY. TURNED	LINE DISCOUNT %
0	0
RE... DAY BIL...	PARTIAL RETURN DATE
<input checked="" type="checkbox"/>	
	ODT TRANSFER ORDER NO.
	1006
Open record "1006" in a new window	
AMOUNT	

The contract can be printed from the contract command bar, by selecting Process, then Print.

The following steps demonstrate the posting of the shipment of the rental units.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

CRONUS | RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00003

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

CRONUS | RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00003

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice

Post the shipment of the rental units on the rental lines. A posted delivery d

Sell-to Customer Name Adatum Corporation

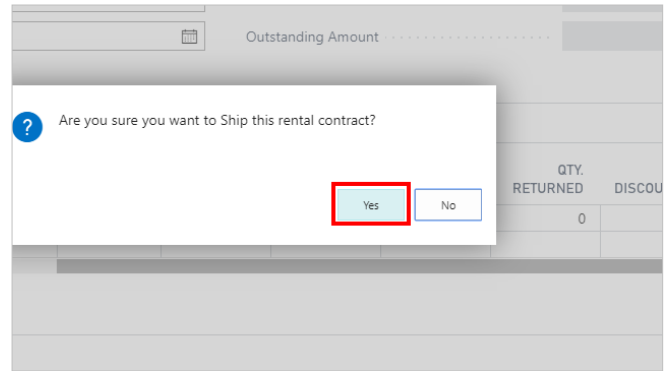
Quote No.

Posting Date 4/8/2019

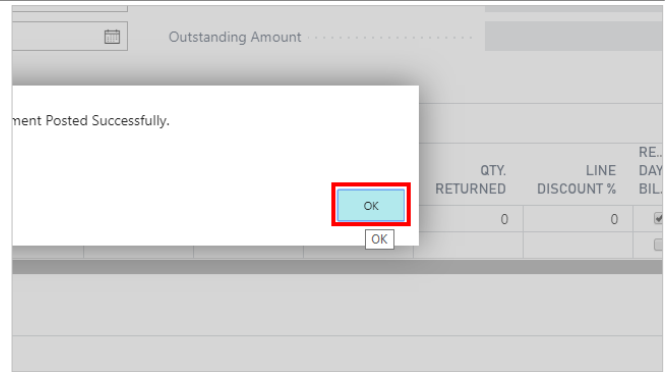


ODT Rentals Online Help

Click on the button **Yes**

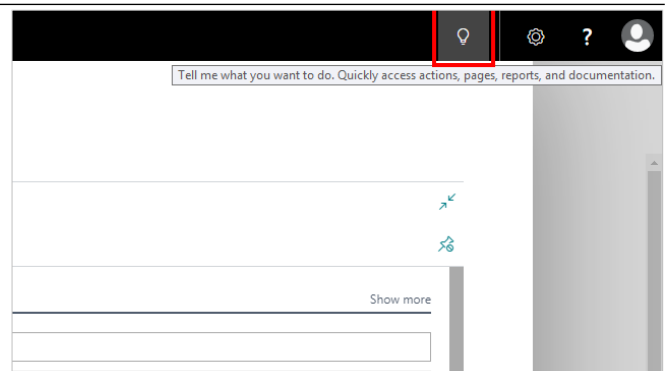


Click on the button **OK**

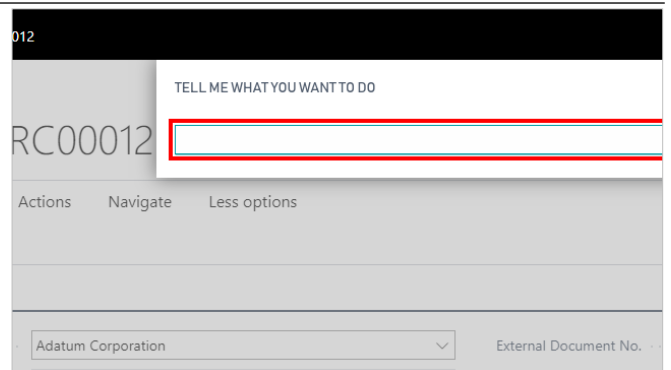


The following steps demonstrate viewing the Item Ledger Entries created when Rental Unit linked to an item was entered on the Rental Contract.

Click on the link

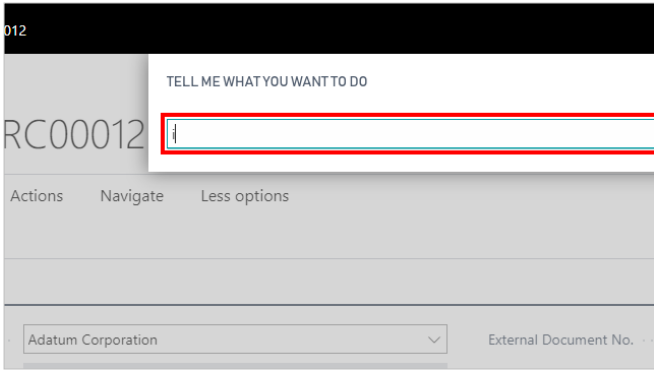


Click on the field **Type to start search:**

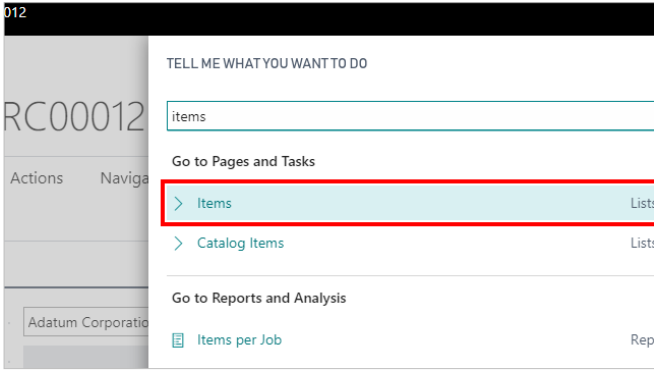




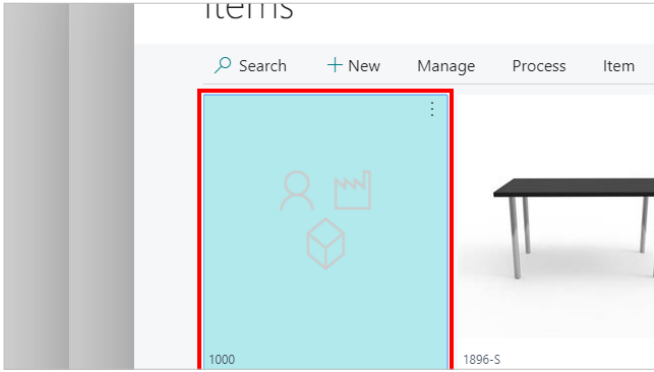
Enter the text **items**.



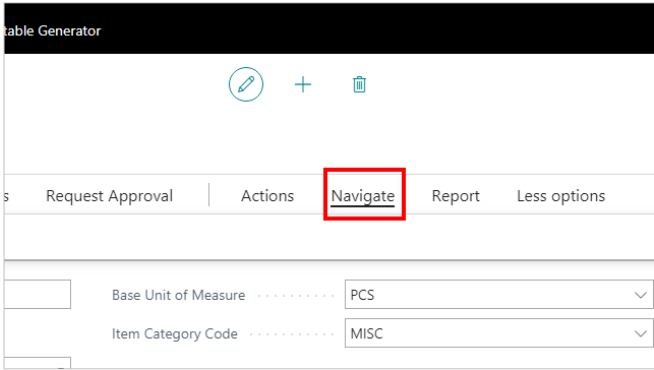
Click on **Items Lists**



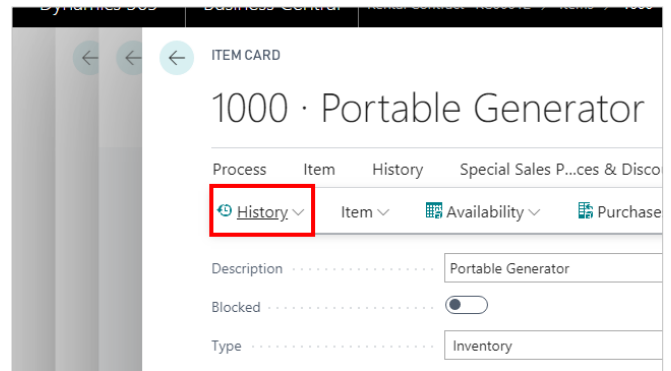
Click on the data brick **No. = 1000, Description = Portable Generator, Type = 0**



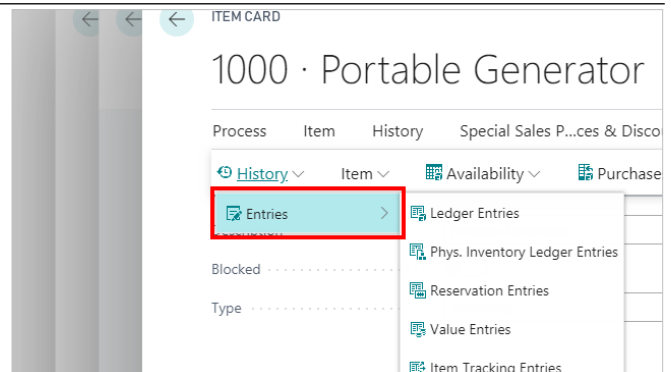
Click on the navigation menu item popup **Navigate**



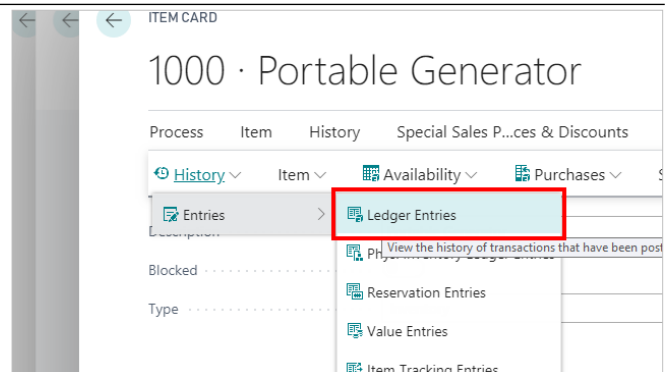
Click on the navigation menu item popup **History**



Click on the navigation menu item popup **Entries**



Click on the navigation menu item **Ledger Entries**



The picture provided here displays the Item Ledger Entries created when the unit linked to the item was entered on the Rental Contract.

Item Ledger Entries												
POSTING DATE	ENTRY TYPE	DOCUME... TYPE	DOCUME... NO.	ITEM NO. ▼	DESCRIPTION	LOCATION CODE	QUANTITY	INVOICED QUANTITY	REMAINING QUANTITY	SALES AMOUNT (ACTUAL)	COST AMOUNT (ACTUAL)	COST AMOUNT (NON-INVTL)
4/9/2018	Transfer	Transfer Re...	109002	1000	RENTRESERV		4	4	4	0.00	8,000.00	0.00
4/9/2018	Transfer	Transfer Re...	109002	1000			-4	-4	0	0.00	-8,000.00	0.00
4/9/2018	Transfer	Transfer Shi...	108002	1000			4	4	0	0.00	8,000.00	0.00
4/9/2018	Transfer	Transfer Shi...	108002	1000		EAST	-4	-4	0	0.00	-8,000.00	0.00

In the Item Ledger Entries, as per standard inventory processing of transfers, when Direct Transfers are done the Location code is not populated on the direct transfer entries.

The following steps demonstrate navigating to the Posted Transfer Shipment from the EAST Location which were created and highlights some of the fields related to the rentals.

The same can be done for the Posted Transfer

Receipt into the RENTRESERV Location.

Click on the navigation menu item popup **Actions**

Central | Rental Contract - RC00012 > Items > 1000 - Portable Generator > Item 1000 Portable

PORTABLE GENERATOR

Ledger Entries

Process Open in Excel **Actions** Navigate Less options

ENTRY TYPE	DOCUME... TYPE	DOCUME... NO.	ITEM NO. ▼	DESCRIPTION	LOCA CODE
Transfer	Transfer Re...	109002	1000		RENT
Transfer	Transfer Re...	109002	1000		

Click on the navigation menu item **Navigate**

Item 1000 PORTABLE GENERATOR

Item Ledger Entries

Search Process Open in Excel **Actions**

Functions **Navigate**

DATE	TYPE	DESCRIPTION	ITEM NO.	LOCA CODE
4/9/2018	Transfer	Transfer Re...	109002	1000
4/9/2018	Transfer	Transfer Re...	109002	1000
4/9/2018	Transfer	Transfer Shi...	108002	1000

Click on the cell **Related Entries** with the value **Posted Transfer Receipt**

Document No. 109002

Find By | Actions | Less options

RELATED ENTRIES

Posted Transfer Receipt
G/L Entry
Item Ledger Entry
Value Entry

Click on the navigation menu item popup **Process**

Dynamics 365 | Business Central | Rental Contract - RC00012 > Items > 1000

NAVIGATE

DOCUMENT

Document No. 109002

Process Find By | Actions | Less options

RELATED ENTRIES

Posted Transfer Receipt
G/L Entry



ODT Rentals Online Help

Click on the navigation menu item **Show Related Entries**

NAVIGATE

DOCUMENT
Document No. 109002

Process Find By Actions Less options

Show Related Entries Find Print...

View the related entries of the type that you have chosen.

Posted Transfer Receipt
G/L Entry
Item Ledger Entry
Value Entry

Click on the field **Transfer-from Code**

Note that the location matched the location that was entered on the rental line of the contract.

Actions Navigate Less options

109002	Tran
EAST	Tran
RENTRESERV EAST	Pos
<input type="checkbox"/>	Ext

Click on the field **Transfer-to Code**

Note that the location is the location that was setup on the Rental Management Setup, Inventory Rental Location field for direct transfers.

Actions Navigate Less options

109002	Tran
EAST	Tran
RENTRESERV	Pos
<input type="checkbox"/> RENTRESERV	Ext

More options

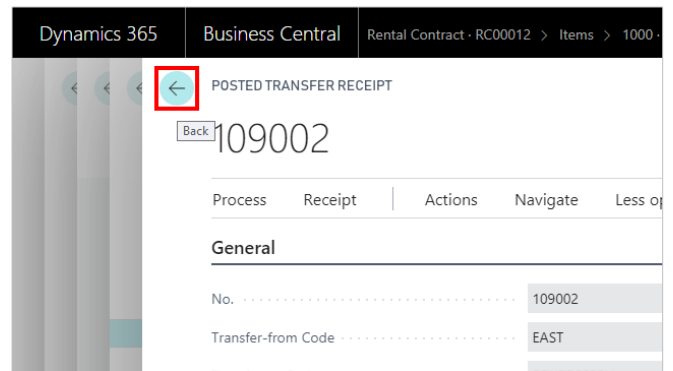
Click on the field **External Document No.**

Note that the Rental Contract No. is populated in the External Document No., which makes it easy for a user to know which contract the transfer was related to.

Show more

1004
4/9/2018
4/9/2018
RC00012
RC00012

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00012 > Items > 1000 ·

← POSTED TRANSFER RECEIPT

Back 109002

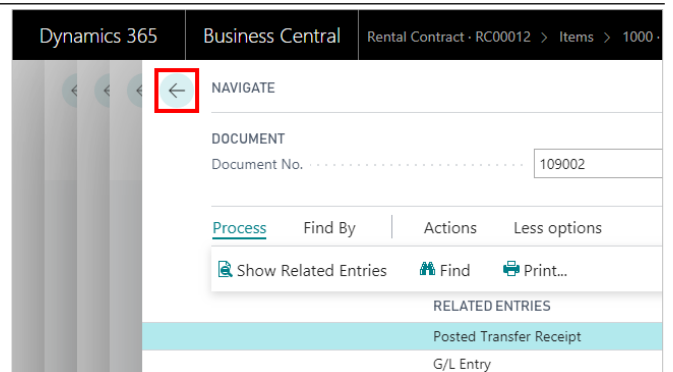
Process Receipt Actions Navigate Less options

General

No. 109002

Transfer-from Code EAST

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00012 > Items > 1000 ·

← NAVIGATE

DOCUMENT

Document No. 109002

Process Find By Actions Less options

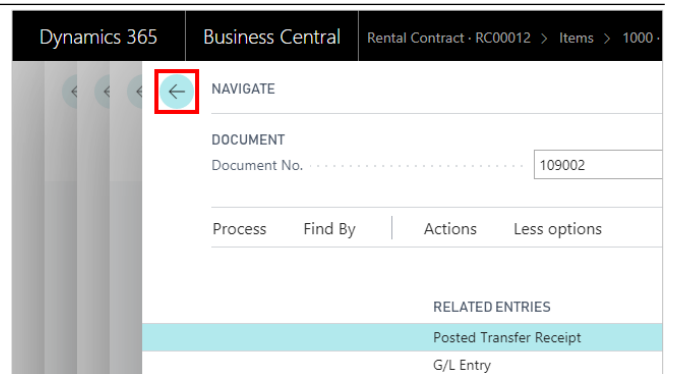
Show Related Entries Find Print...

RELATED ENTRIES

Posted Transfer Receipt

G/L Entry

Click on the back button



Dynamics 365 Business Central Rental Contract · RC00012 > Items > 1000 ·

← NAVIGATE

DOCUMENT

Document No. 109002

Process Find By Actions Less options

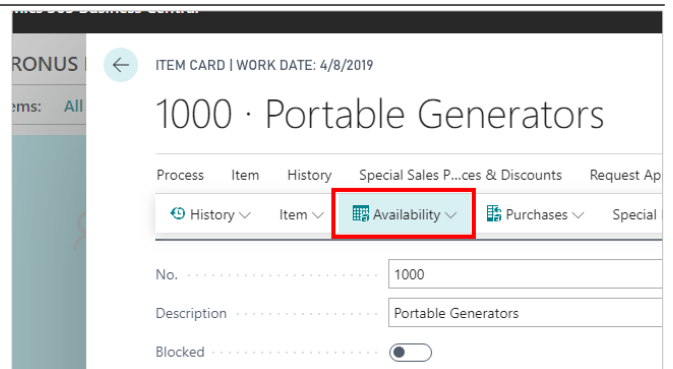
RELATED ENTRIES

Posted Transfer Receipt

G/L Entry

The following steps demonstrate the Item Availability as a result of the transfers and Item Ledger Entries created.

Click on the navigation menu item popup **Availability**



← ITEM CARD | WORK DATE: 4/8/2019

1000 · Portable Generators

Process Item History Special Sales P...ces & Discounts Request Ap

History Item Availability Purchases Special

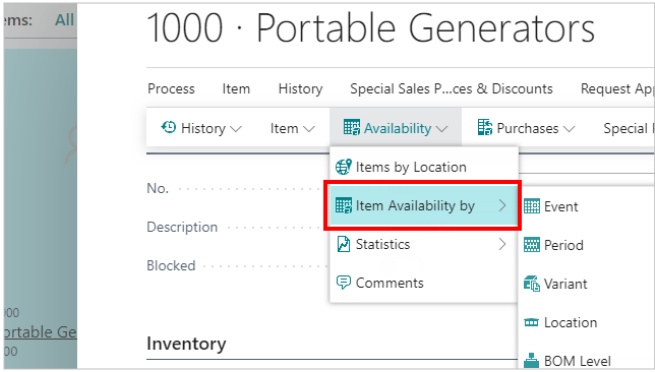
No. 1000

Description Portable Generators

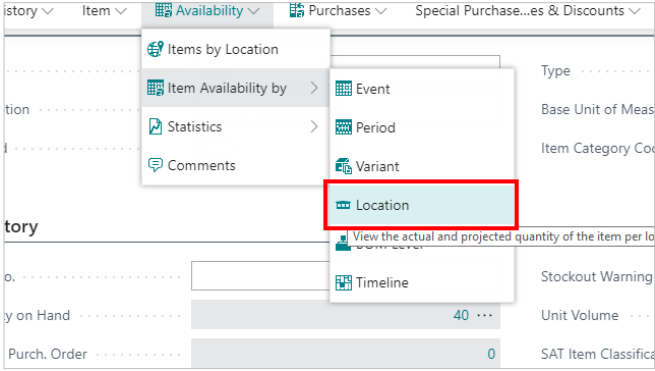
Blocked ☐



Click on the link **Item Availability by**



Click on the navigation menu item **Location**



Click on the cell **Qty. on Hand** with the value **4**

Note that as on the Rental Contract, the Rental Quantity entered was 4, the RENTRESERV Location now has 4 in that location.

0	0	0	0
0	0	16	8
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
8	0	4	12
0	0	20	20

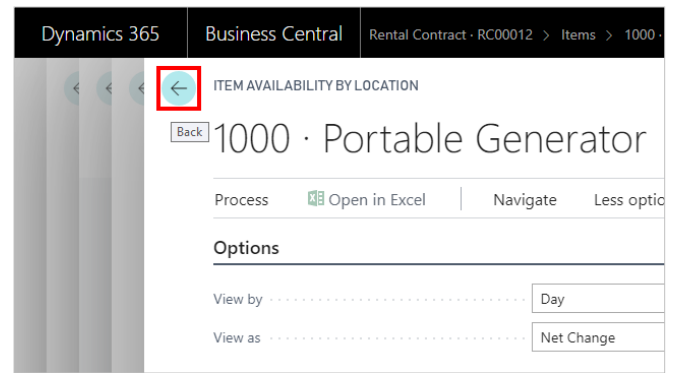
Click on the cell **Qty. on Hand** with the value **16**

When purchasing the item, a quantity of 10 was purchased into the EAST Location.

Note that the Qty. On Hand in the EAST Location now displays 6.

SCHEDULED RECEIPT	PLANNED RECEIPT	QTY. ON HAND	PROJECTED AVAILABLE BALANCE
0	0	0	0
0	0	16	8
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
8	0	4	12

Click on the back button



Processing of the invoicing and returning can be completed using the same steps as noted in the help document, How to Process Rental Contracts for Billing at End of the Contract located in the Processing Rentals, Rental Contracts.

When the units are returned on the contract, then a Transfer Order will be created and the shipment and receipt posted, which will transfer the item quantity to the EAST Location from the RENTRESERV Location.

To learn about Bulk Returns, go to ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Bulk Returns.

3.8.2.3. Processing Contracts With In-Transit Locations

Profile - Sales Order Processor

Basically the same steps can be used should the user have the Business Manager Profile assigned.

The purpose of the following chapter is to display the impact on the Item, when it has been linked to a Rental Unit and the unit is rented out, where on Inventory Setup the Location Mandatory field is enabled.

Included is a review of the Item Ledger Entries, Posted Transfer Shipment and Receipt documents and the Item Availability, when the linked unit is entered on a contract and when the unit is returned.

Setups completed for using the In-Transit Location, in addition to the setups noted in the Processing Contract when In-Transit Locations are not used, include:

- Creating an new In-Transit Location for rental transfers
- Adding the new In-Transit Location to the Rental Management Setup, Inventory Rentals In-Transit Location field
- Enabling the Location Mandatory field on Inventory Setup

In this example, a location called RENTRESERV has been created and added to the Rental Management Setup,

As Location Mandatory field is enabled on the Inventory Setup, then the transfers cannot be direct transfers.

Therefore for rentals, the field on Rental Management Setup, Inventory Rental In-Transit Location must be populated. When the Inventory Setup has the field Location Mandatory enabled, then the system ensures that this field is populated. If not, then an



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines | [Manage](#) | More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collaps](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | [Manage](#) | More options

Click on the link in cell **No.** with the value **PG-001**

CRON

Rental C

NO.

RC0001

RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	

Click on the cell **Rental Terms Code**

If the Rental Term is to be different than the one that defaulted from the Rental Unit, then lookup and select the applicable term.

[Manage](#) | More options

[Delete Line](#) [Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Portable Generators	MONTH-END	1	

Manage

UNIT OF

Click on the cell **Rental Quantity**

More options

[Group Avail Matrix](#)

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Portable Generators	MONTH-E	1		

UNIT OF



Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Portable Generators	MONTH-END	2		

UNIT OF

Click on the cell **Location Code**

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
Portable Generators	MONTH-END	2				4/

UNIT OF

Click on **Code = WEST, Name = West Warehouse**

TERMS CODE	RENTAL QUANTITY	LOCATION CODE	TERMS CODE ALT1	TERMS CODE ALT2	START DATE
MONTH-END	2				4/9/2018

CODE

NAME

EAST

East Warehouse

RENTRESERV

Inventory Items Res

WEST

West Warehouse

LOCATION
CODE

QUANTITY

MEASURE
CODE

UNIT PRICE
EXCL. TAX

TAX GROUP
CODE

AT
EX

0

0.00

*

Should there not be sufficient quantity of the item in inventory at the specified location, then this must be corrected in order to ship the rental unit from the contract, and to ensure the Item Availability displays the correct amounts.

If the Location selected is correct, then either a transfer or purchase must be made to that Location. Alternatively, the Rental Quantity could be reduced on the contract.

The shortage can be addressed directly from the rental contract.

To learn about resolving rental shortages, see ODT Rental Online Help, Processing Rentals, Resolving Rental Shortages.



ODT Rentals Online Help

Click on the cell **Rental Return Date**

Should the expected date of return of the unit be different than the automatically populated date, then enter or look-up and select the expected Rental Return Date.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		4/9/2018	5/8/2018	500.00	0.00	
				Type the date in the format M/d/yyyy		

The following steps demonstrate the posting of the shipment of the rental units.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00005

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Ship Rentals**

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00005

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice

Post the shipment of the rental units on the rental lines. A posted delivery

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/8/2019

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

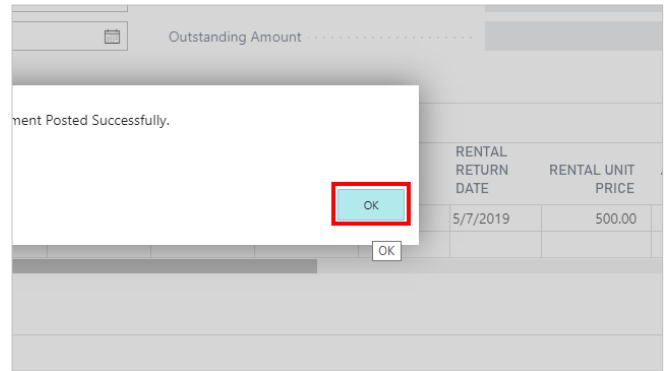
RENTAL
RETURN
DATE

5/7/2019



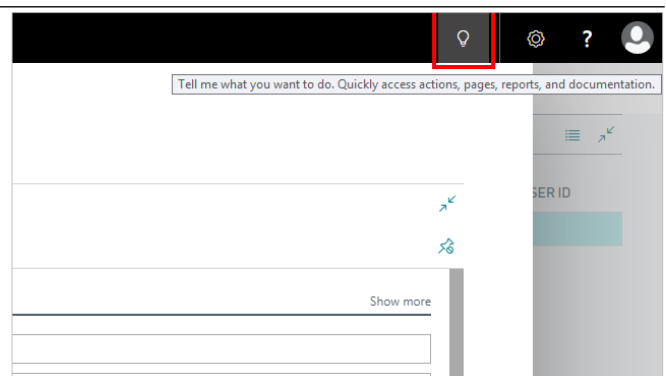
ODT Rentals Online Help

Click on the button **OK**

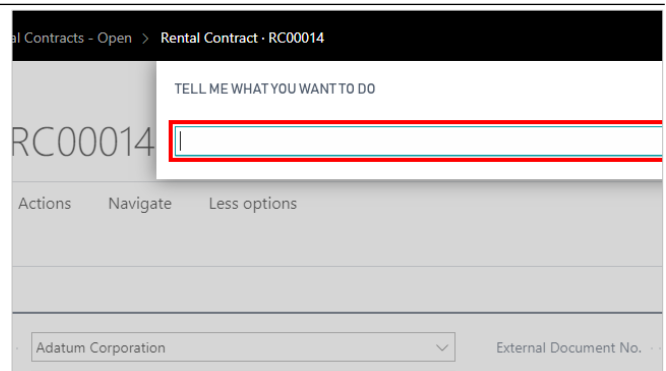


The following steps demonstrate viewing the Item Ledger Entries created when Rental Unit linked to an item was entered on the Rental Contract.

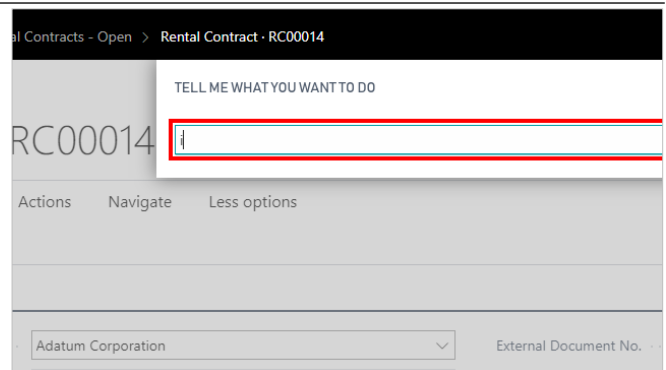
Click on the link



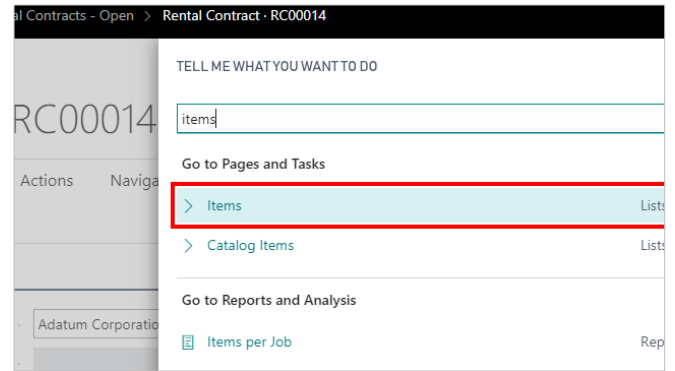
Click on the field **Type to start search:**



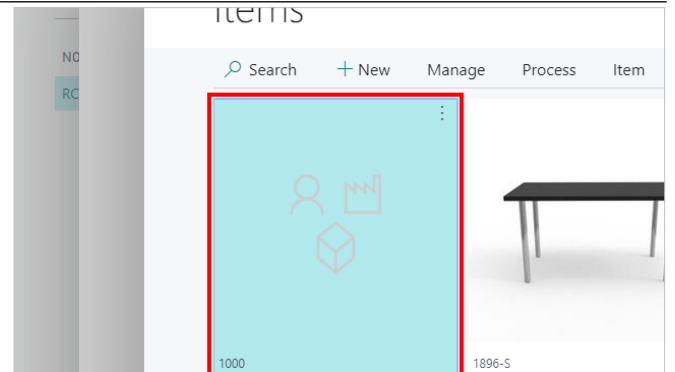
Enter the text **items**.



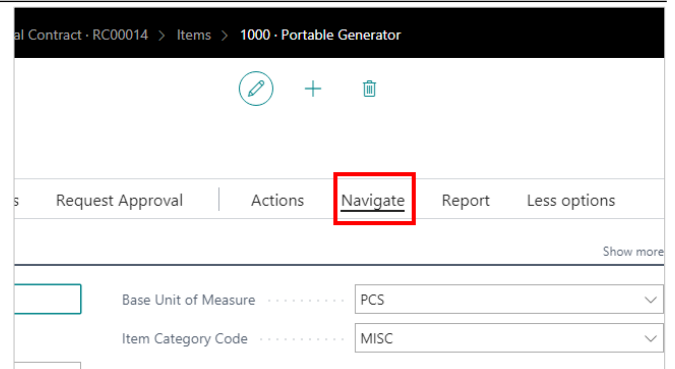
Click on **Items Lists**



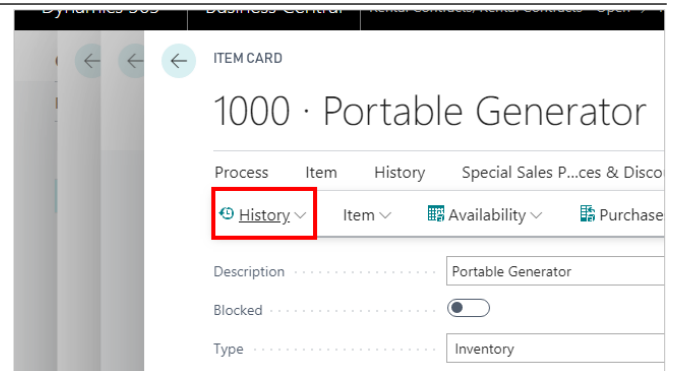
Click on the data brick **No. = 1000, Description = Portable Generator, Type = 0**



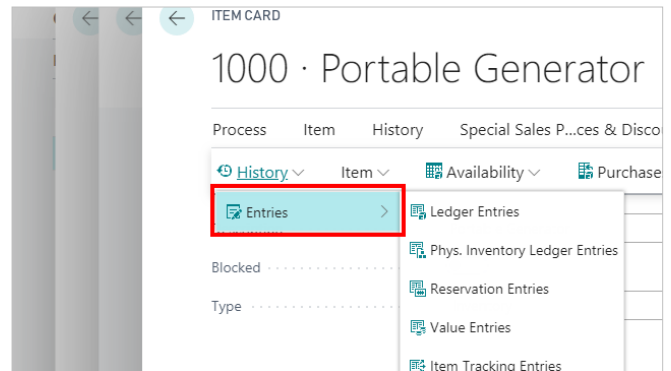
Click on the navigation menu item popup **Navigate**



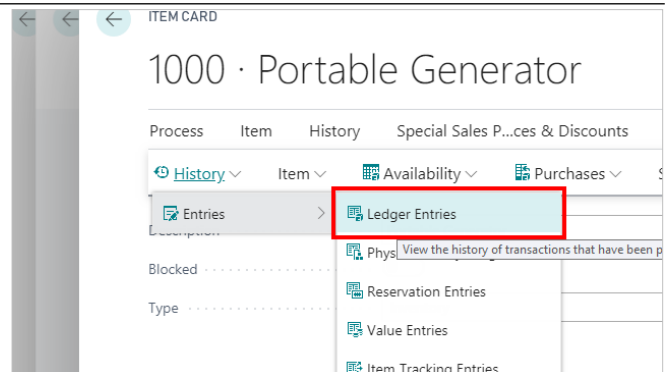
Click on the navigation menu item popup **History**



Click on the navigation menu item popup **Entries**



Click on the navigation menu item **Ledger Entries**



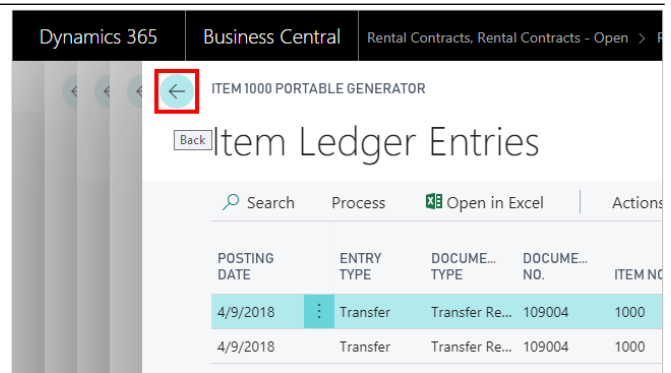
When the Inventory Setup has the Location Mandatory field enabled, then an In-Transit Location must be used when creating and posting Transfer Orders.

In the picture provided here, which displays the entries created, the Location field has the RENT.LOG Locations, which was setup on Rental Management Setup.

POSTING DATE	ENTRY TYPE	DOCUME... TYPE	DOCUME... NO.	ITEM NO.	DESCRIPTION	LOCATION CODE	QUANTITY	INVOICED QUANTITY	REMAINING QUANTITY	SALES AMOUNT (ACTUAL)	COST AMOUNT (ACTUAL)	COST AMOUNT (NON-INVTL)	OP...	T
4/9/2018	Transfer	Transfer Re...	109004	1000		RENTRESERV	2	2	2	0.00	4,000.00	0.00	✓	Tr
4/9/2018	Transfer	Transfer Re...	109004	1000		RENT.LOG	-2	-2	0	0.00	-4,000.00	0.00		Tr
4/9/2018	Transfer	Transfer Shi...	108004	1000		RENT.LOG	2	2	0	0.00	4,000.00	0.00		Tr
4/9/2018	Transfer	Transfer Shi...	108004	1000		WEST	-2	-2	0	0.00	-4,000.00	0.00		Tr

The Posted Transfer Shipment and Posted Transfer Receipts can be viewed using the same steps demonstrated in the chapter, Processing Contracts When In-Transit Locations are not used.

Click on the back button



The following steps demonstrate the Item Availability as a result of the transfers and Item Ledger Entries created.



Click on the navigation menu item popup **Navigate**

al Contract · RC00014 > Items > 1000 · Portable Generator

Request Approval

Actions

Navigate

Report

Less options

Special Purchase...es & Discounts

Sales

Bill of Materials

V

Base Unit of Measure

PCS

Item Category Code

MISC

Click on the navigation menu item popup **Availability**

ITEM CARD

1000 · Portable Generator

Process

Item

History

Special Sales P...ces & Discounts

Re

History

Item

Availability

Purchases

Spe

Description

Portable Generator

Blocked

☐

Type

Inventory

Click on the navigation menu item popup **Item Availability by**

1000 · Portable Generator

Process

Item

History

Special Sales P...ces & Discounts

Re

History

Item

Availability

Purchases

Spe

Description

Portable Generator

Blocked

☐

Type

Inventory

Items by Location

Item Availability by

Event

Statistics

Comments

Period

Variant

Location

BOM Level

Click on the navigation menu item **Location**

Item

Availability

Purchases

Special Purchase...es & Discou

Items by Location

Item Availability by

Statistics

Comments

Event

Period

Variant

Location

BOM

Timeline

Base Unit of Measure

Item Category Code

View the actual and projected quantity of the it

Posting

LS

POSTING DETAILS

This feature can be used with Locations, whether Inventory Setup has the field Location Mandatory enabled or not.

For processing rentals with a serialized item linked to the rental unit, the Item Tracking Code setup is required, and must be specified on the Item card.

When purchasing the items, the Serial Nos. can be assigned using a No. Series code when setup on the item card, or when purchasing custom Serial Nos. can be assigned.

The setup of the serialized item and the purchasing of the item is done using the standard processes and is not covered here.

Once the Item has been setup, then it is linked to the Rental Unit on the Link tab selecting the Type Item, and then selecting the Item in the Link Code.

When Locations are used, then the entry of units linked to serialized items, requires the selection of the serialized items in the Item Tracking Entries, accessed from the Rental Line menu option, Line, Item Tracking Lines.

The Transfer Order, Item Tracking Entries will be updated when the Serial Nos. are selected. The posting of the rental unit shipment will automatically post the Transfer Order, updating the inventory.

When used without Locations, the availability of the item is not updated, as no transfer order is created or posted.

For information on the setup of rental locations, see ODT Rental Online Help, Setup Rentals, Setup Rental Locations.

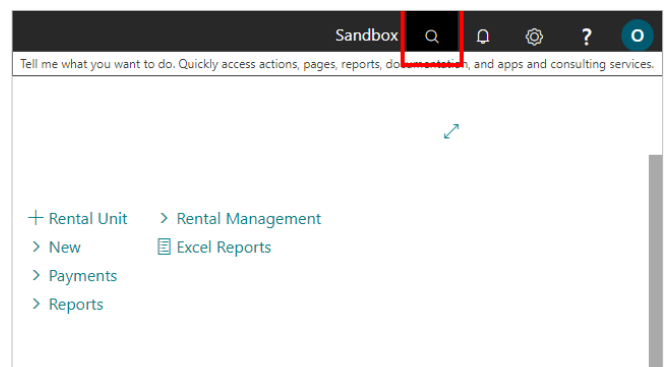
For information on the setup of Rental Management Setup for processing rentals, when an Item is linked to a Rental Unit, see ODT Rental Online Help, Setup Rentals, How to Set Up Rental Management Setup.

For additional information, see Processing Rentals, Processing Rentals with Units Linked to Items and How to Process Contracts When Units are Linked to Items.

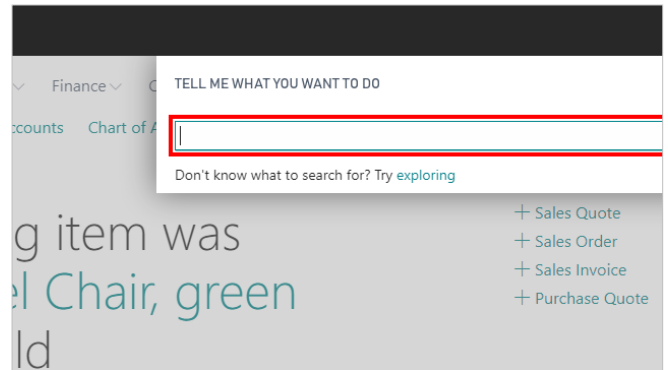
3.8.3.2. How to Set Up an Item Tracking Code for Serialized Rentals

The following demonstrates the setup of the Item Tracking Code for Serialized Items that will be linked to Rental Units.

Click on the link **Tell me what you want to do.**



Click on the field **Type to start search:**

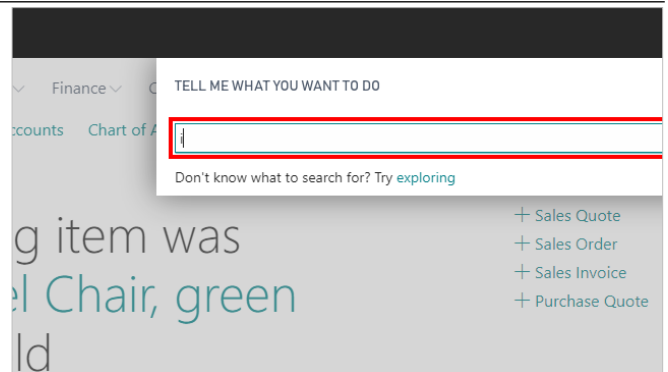


TELL ME WHAT YOU WANT TO DO

Don't know what to search for? Try [exploring](#)

+ Sales Quote
+ Sales Order
+ Sales Invoice
+ Purchase Quote

Enter the text **item tracking**.

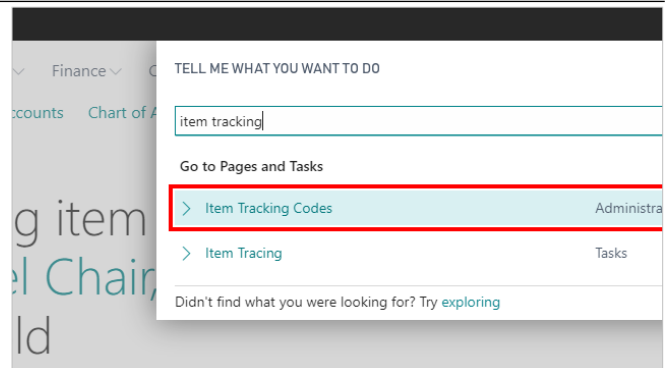


TELL ME WHAT YOU WANT TO DO

Don't know what to search for? Try [exploring](#)

+ Sales Quote
+ Sales Order
+ Sales Invoice
+ Purchase Quote

Click on **Item Tracking Codes**



TELL ME WHAT YOU WANT TO DO

item tracking

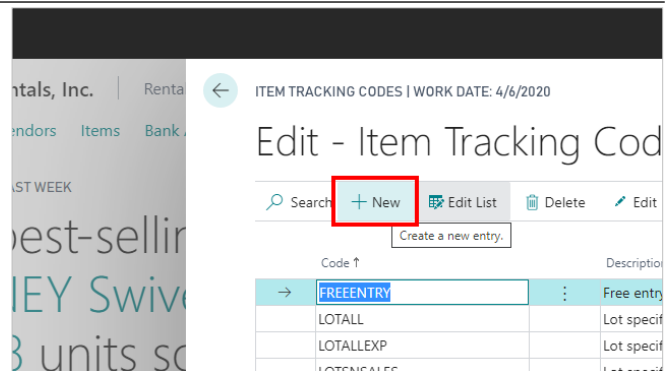
Go to Pages and Tasks

> **Item Tracking Codes** Administrative

> Item Tracing Tasks

Didn't find what you were looking for? Try [exploring](#)

Click on the navigation menu item **New**



ITEM TRACKING CODES | WORK DATE: 4/6/2020

Edit - Item Tracking Code

Search **+ New** Edit List Delete Edit

Create a new entry.

Code ↑	Description
→ FREEENTRY	Free entry
LOTALL	Lot specific
LOTALLEXP	Lot specific
LOTSNSALES	Lot specific



Click on the field **Code**

Item Tracking Code Card

General

Code * [Red Box]

Serial No.

GENERAL

SN Specific Tracking [Toggle]

Enter the text **rentsnall**.

Item Tracking Code Card

General

Code * [Red Box]

Serial No.

GENERAL

SN Specific Tracking [Toggle]

Click on the field **Description**

Item Tracking Code Card

Description [Red Box]

SN Warehouse Tracking [Toggle]

SN Transfer Tracking [Toggle]

Enter the text **Rental Tracking Code**.

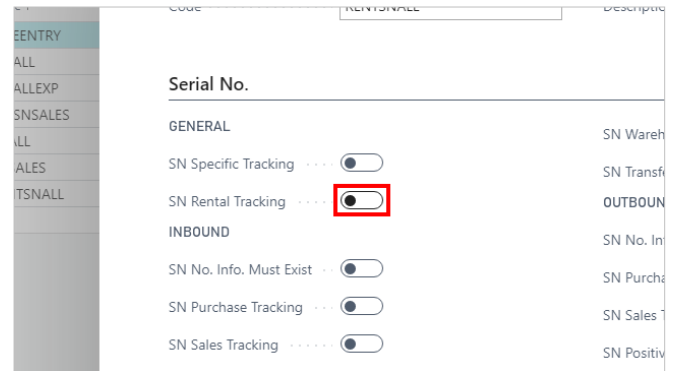
Item Tracking Code Card

Description [Red Box]

SN Warehouse Tracking [Toggle]

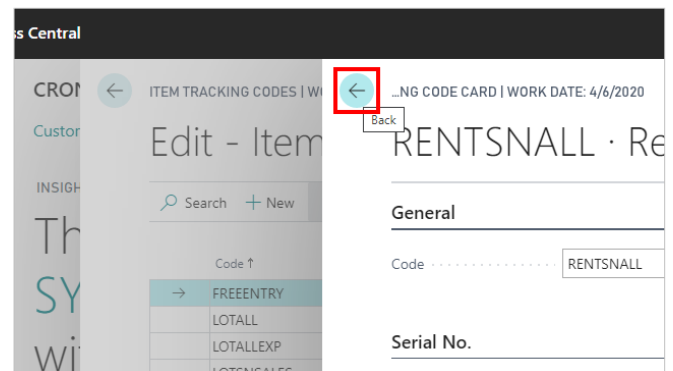
SN Transfer Tracking [Toggle]

Click on the toggle field SN Rental Tracking

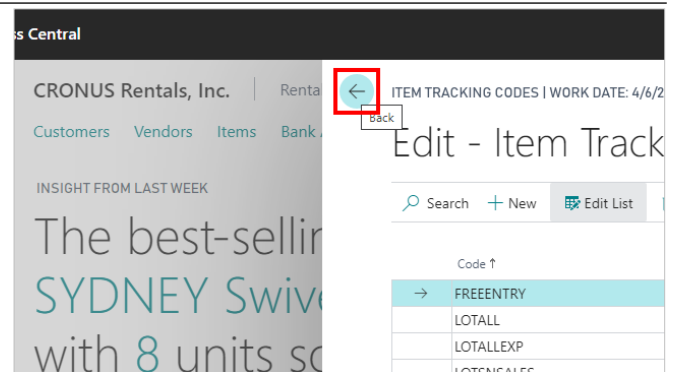


Should an organization use of Serial No. Tracking be combined with the use of Bins, then it is recommended to enable the SN Warehouse Tracking so that the Serials Nos. are included in the Warehouse Entries.

Click on the back button



Click on the back button



3.8.3.3. How to Enter a Rental Line with a Rental Unit Linked to Serialized Items

The following demonstrates the creation of a Rental Contract, and the entry of a Rental Unit that has a Serialized Item linked to it.

In this example, both Inventory Setup and Rental Management Setup have the field, Location Mandatory enabled. Therefore the Transfer Orders will be indirect transfers.

The Item that will be using in demonstrating the processing of Rental Contracts with the Rental Unit it is linked to, has the Costing Method set to Specific, the Item Tracking Code to RENTSNALL and the Serial Nos. to SN1.

The specification of a No. Series for Serial Nos. is not mandatory. When purchasing the entry of Custom Serial Nos. can be completed in the Item Tracking Entries.



Click on the navigation menu item **Rental Contract**

Rental Terms Rental Units Rental Packages

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit	> R
+ Sales Order	+ Purchase Invoice	> New	☰ E
+ Sales Invoice	+ Rental Quote	> Payments	
+ Purchase Quote	+ Rental Contract	> Reports	

Create a new rental contract for rental product

Click on the field **Sell-to Customer Name**

ATC: 5/15/2024

il | Actions Navigate Fewer options

Look up value

Click on the link in cell **No.** with the value **10000**

Contract Rental Actions Navigate Fewer options

al

ustomer Name

o.

Date

ate

nt Date

No. ↑	Name	ZIF
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		

Click on the cell **Rental Unit No.**

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→			
	Look up value		

Sales Lines Manage Line Fewer options



Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' table with columns: Rental Unit No., Standard Text Code, Description, and Rental Term Code. A dropdown menu is open for the 'Rental Unit No.' column, showing a list of items. The '2:2' item is highlighted in the dropdown.

Click on the link in cell **No.** with the value **RU00027**

No. ↑	Description	Group ↑
→ PG-001	Portable Generators	
RP00001	Mini Excavator with Vibrator Plate	
RU00007	165 G Brad Nailer	
RU00026	Wacker Hammer Drill Bits 3/16 inch	
RU00027	Air Impact Wrench 1 inch Drive	
BD-001	Select record "RU00027" keye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	

The following demonstrates the accessing of the Rental Inventory Availability matrix.

To learn about the Rental Inventory Availability matrix, see ODT Rental Online Help, Processing Rentals, Processing Rentals Overview.

Click on the navigation menu item popup **Manage**

The screenshot shows the 'Rental Lines' table with columns: Rental Unit No., Standard Text Code, Description, and Rental Term Code. The 'Manage' button is highlighted in the table header.

Click on the navigation menu item **Rental Inventory Avail.**

The screenshot shows the 'Rental Inventory Availability' table with columns: Rental Unit No., Standard Text Code, Description, Rental Term Code, and Rental Term Code. The 'Rental Inventory Avail.' button is highlighted in the table header.

The following is the steps to continue the entry on the Rental Line.

ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Functions Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Air Impact Wrench 1 inch Drive	MONTH-PEND	0				

Enter the text **2**.

Functions Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
Air Impact Wrench 1 inch Drive	MONTH-PEND	<div><div></div><div>0</div></div>				

Click on the cell **Location Code**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Wrench 1 inch Drive	MONTH-PEND	2				5/5/2020
				Look up value		

Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
1 inch Drive	MONTH-PEND	2	<input type="text" value=""/>			5/5/2020	6/4/20
			0.00				
			→ CENTRAL		Central Warehouse		
			EAST		East Warehouse		
			REN	Select record "EAST"	Inventory Items Rental Rese		
			SOUTH		South Warehouse		
			TEMP		Temporary Location		
			WEST		West Warehouse		
			+ New				
			0		0.00	*	

The rental Item Tracking Lines are similar to the sales Item Tracking Lines contain the same menu options.

The main difference is that on the lines the rental fields, Qty. to Rent and Qty. to Return are displayed.

The Serial Nos. can be either selected using the look-up button or by using the menu option, Process, Select Entries.

The following demonstrates the selection of the Serial Nos. using the menu option.



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date 5/5/2020

Order Date 5/5/2020

Document Date 5/5/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-F

Click on the navigation menu item **Item Tracking Lines**

Contract Total

Outstanding Amount

Entered Usage Entries

Periodic Usage Entries

Item Tracking Lines

Additional Notes

View or edit serial numbers and lot numbers

2	EAST		5/5/2020	6/4/2020	453.00	
---	------	--	----------	----------	--------	--

Click on the navigation menu item popup **Process**

Contract - RENTAL CONTRACT - RC00010

Contract - RC00010

Rental

Actions

Navigate

Manage

Process

Line

Actions

Navigate

Delete

EDIT - ITEM TRACKING LINES - 1003 - AIR IMPACT WRENCH, 1 IN

SOURCE

Rental Line

Quantity

Qty. to Handle

Click on the navigation menu item **Select Entries**

Contract - RENTAL CONTRACT - RC00010

Contract - RC00010

Contract

Rental

Actions

Navigate

Manage

Process

Line

Actions

Navigate

Select Entries

Refresh Availability

Select from existing, available serial or lot numbers

EDIT - ITEM TRACKING LINES - 1003 - AIR IMPACT WRENCH, 1 IN

SOURCE

Rental Line

Quantity

Qty. to Handle



Click on the button **OK**

The lines in the Item Tracking Lines will automatically be populated with the Serial Nos. of the lines accepted as above.

Alternatively the records with the desired Serial Nos. can be selected by using the look-up in the Serial No. field on the lines.

The Qty. to Rent and Qty. to Return will be automatically populated on the lines.

Click on the button **Close**

The following demonstrates reviewing the Transfer Order, Item Tracking Lines.

Click on the link in cell **ODT Transfer Order No.** with the value **1005**

Click on the navigation menu item popup **Line**



Click on the navigation menu item popup **Item Tracking Lines**

Direct transfer

In-Transit Code RENT.LOG

Posting Date 5/5/2020

Lines | Manage | Functions | Line | Fewer options

Item Availability by ▾ Dimensions **Item Tracking Lines ▾**

Item No.	Description	Quantity	Reserved Quantity	Inbnd.
→ 1003	Air Impact Wrench, 1 in.	2		

Click on the navigation menu item **Rental**

In-Transit Code RENT.LOG

Posting Date 5/5/2020

Lines | Manage | Functions | Line | Fewer options

Item Availability by ▾ Dimensions **Item Tracking Lines ▾**

Rental

View or edit serial numbers and lot numbers that

Item No.	Description	Reserved Quantity
→ 1003	Air Impact Wrench, 1 in.	2

Shipment

Click on the cell **Serial No.** with the value **SN00001**

The Item Tracking Line Serial Nos. selected on the rental line Item Tracking Entries automatically populate the Transfer Order, Item Tracking Lines.

RE

Qty. to Handle 2

Qty. to Invoice 2

Item Tracking Code RENTSNALL

Availability, Serial No.

Serial No.	Quantity
SN00001	
→ Yes	SN00002
	SN00001

Click on the button **Close**

Qty. to Rent	Qty. to Return
1	1
1	1

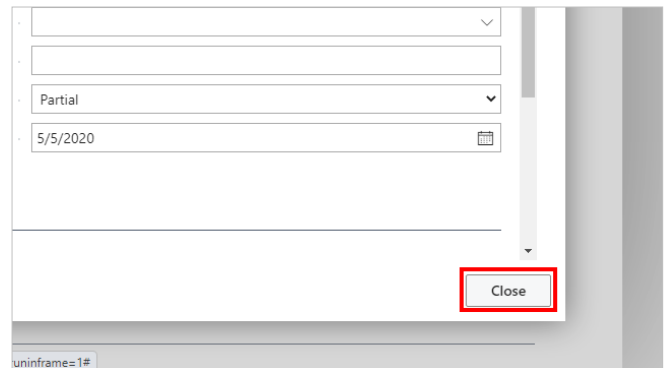
Close

Quantity Received 5/5/2020

Agent Service Code

Time

Click on the button **Close**



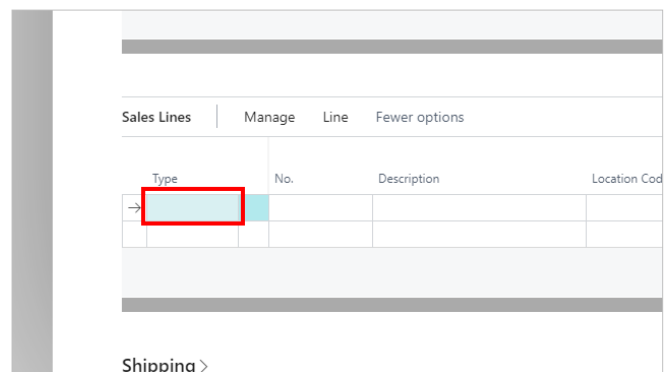
The screenshot shows a web form with several input fields. The 'Close' button is located at the bottom right of the form and is highlighted with a red rectangular box.

The following demonstrates the reviewing of the Rental Inventory Availability, and the Item card opened to review the Item Availability by Location.

3.8.3.4. How to Enter a Serialized Item on the Sales Lines

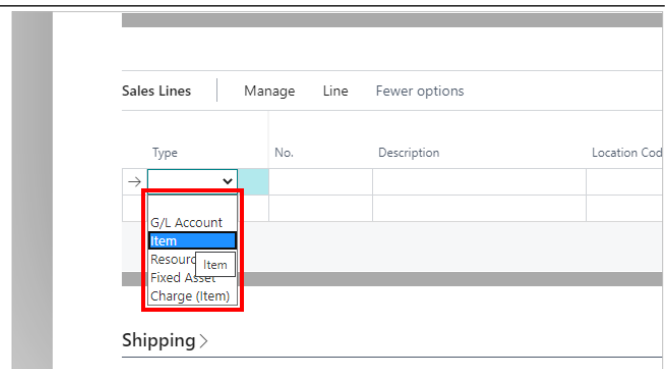
The following demonstrates the entry of a Serialized Item on the Sales Lines.

Click on the cell **Type**



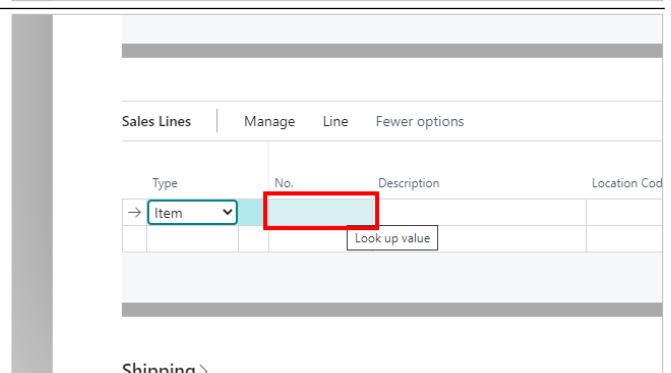
The screenshot shows a table with columns: Type, No., Description, and Location Cod. The 'Type' cell in the first row is highlighted with a red rectangular box.

Click on the item **Item** in the list



The screenshot shows the 'Sales Lines' table with the 'Type' dropdown menu open. The 'Item' option is highlighted in blue, and the entire dropdown menu is enclosed in a red rectangular box.

Click on the cell **No.**



The screenshot shows the 'Sales Lines' table with the 'No.' cell in the first row highlighted with a red rectangular box.



ODT Rentals Online Help

Click on the cell **Quantity** with the value **0**

Fewer options				
Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax
Air Impact Wrench, 1/2 inch	WEST	0	PCS	5,000.00

Enter the text **2**.

Fewer options				
Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax
Air Impact Wrench, 1/2 inch	WEST	2	PCS	5,000.00

Click on the navigation menu item popup **Line**

No.	Code	Description	Code
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-F

Sales Lines	Manage	Line	Fewer options
-------------	--------	-------------	---------------

Type	No.	Description	Location Code
→ Item	1004	Air Impact Wrench, 1/2 inch	WEST

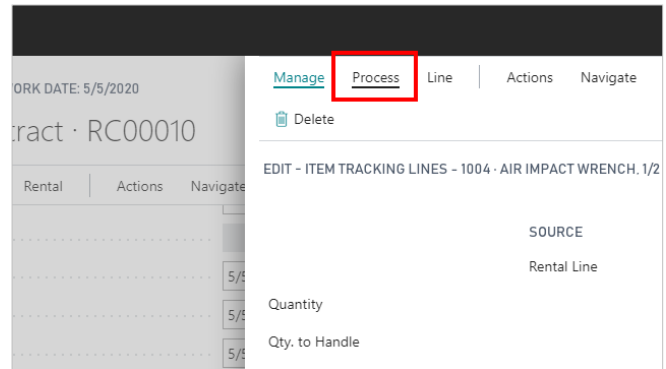
Click on the navigation menu item **Item Tracking Lines**

Sales Lines	Manage	Line	Fewer options
-------------	--------	-------------	---------------

Dimensions	Item Charge Assignment	Item Tracking Lines	View or edit serial numbers and lot numbers t
------------	------------------------	----------------------------	---

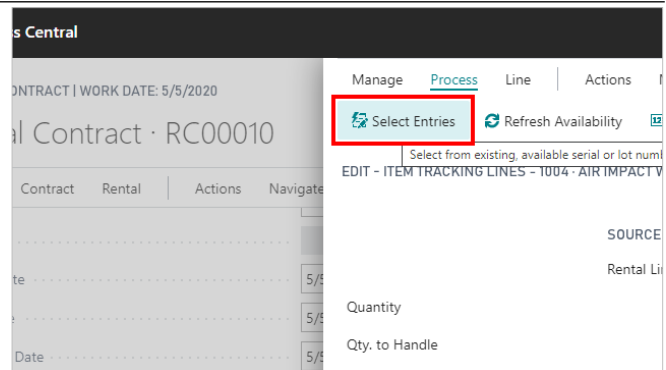
Type	No.	Description	Location Code
→ Item	1004	Air Impact Wrench, 1/2 inch	WEST

Click on the navigation menu item popup **Process**



The screenshot shows a web application interface for processing a rental contract. The top navigation bar includes 'Manage', 'Process', 'Line', 'Actions', and 'Navigate'. The 'Process' button is highlighted with a red rectangle. Below the navigation bar, there is a section for 'EDIT - ITEM TRACKING LINES - 1004 - AIR IMPACT WRENCH. 1/2'. The main area displays a table with columns for 'SOURCE', 'Rental Line', 'Quantity', and 'Qty. to Handle'. The table is currently empty.

Click on the navigation menu item **Select Entries**

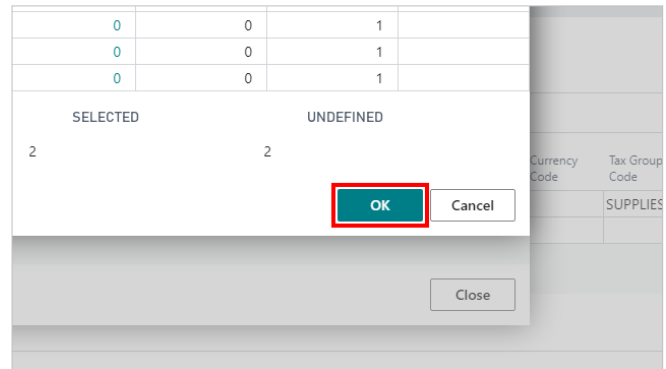


The screenshot shows the same web application interface as the previous one, but with the 'Select Entries' button highlighted in a red rectangle. The button is located in the 'Process' dropdown menu. The main area displays a table with columns for 'SOURCE', 'Rental Line', 'Quantity', and 'Qty. to Handle'. The table is currently empty.

The Select Entries automatically select the first available record or records and populates the lines.

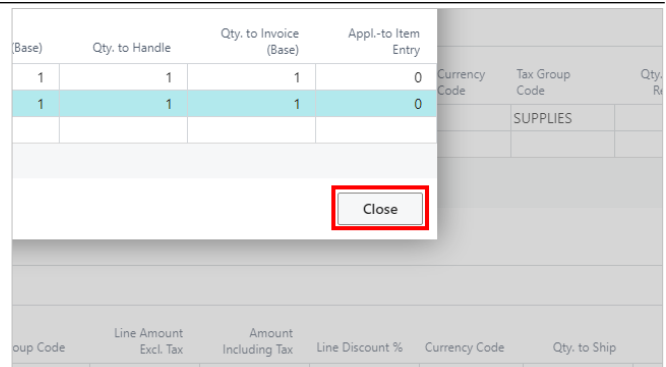
The Serial Nos. to be sold can alternatively be selected by using the look-up in the Serial No. field on the lines.

Click on the button **OK**



The screenshot shows a dialog box with two sections: 'SELECTED' and 'UNDEFINED'. The 'SELECTED' section contains a table with columns for 'Base', 'Qty. to Handle', 'Qty. to Invoice (Base)', and 'Appl.-to Item Entry'. The 'UNDEFINED' section is empty. The 'OK' button is highlighted in a red rectangle. The 'Cancel' button is also visible.

Click on the button **Close**



The screenshot shows the same dialog box as the previous one, but with the 'Close' button highlighted in a red rectangle. The 'Close' button is located at the bottom right of the dialog box.

3.8.3.5. Processing the Rental Contract

The remaining steps in processing the contract, shipping, invoicing and return of the contract is the same as demonstrated in the Processing Rentals, Rental Contracts help, when the full quantity is shipped and returned.

NOTE:

On the To Ship list, the Item Tracking Line menu option is located within the Rental menu option for the selection of Serial Nos. of the items.



On the To Return list, the Item Tracking Line menu option is located within the Rental menu option providing the capability for the selection of Serial Nos. of the items for processing partial returns.

NOTES:

The process of selecting the Serial Nos. and shipment of Rental Unit can be completed from the To Ship list accessed from the cue on the Sales Order Processor profile.

The process of returning the Rental Unit linked to an Item with Serial Nos. can be accomplished from the To Return list.

Returns can as well be processed using the Rental Rapid Returns, which provides the ability to scan or enter the Serial No. of the items.

To learn about using the Rental Rapid Returns feature to process returns of Units linked to Items with Serial No. Tracking, see ODT Rental Online Help, Processing Rentals, Rental Rapid Returns.

To learn about processing partial shipments and partial returns, when serialized Items are linked to Rental Units, see ODT Rental Online Help, Processing Rentals, Partial Shipments and Returns.

In addition the help in Processing Rentals, Pending Shipments and Returns demonstrates the processing of partial shipments and returns of Rental Units linked to serialized Items from the To Ship and To Return cues.

To learn about returning to a different or temporary location, when Items in Bins are linked to Rental Units, see ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location.

3.8.4. How to Process Contracts When Units are Linked to Lot Item

3.8.4.1. Overview

ODT Rentals Rental Units are linked to Items feature includes the capability for Lot Tracking with and without Use Expiration Dates enabled. The Use Expiration Dates in rentals includes both with and without Strict Expiration Posting enabled. ODT Rentals does not include Warranty Date Formula, or the Require Warranty Date Entry features related to Lot tracking.

For processing rentals of an Item with Lot tracking linked to the rental unit, the Item Tracking Code setup is required and must be specified on the Item card. The Item Tracking Code requires specific settings for processing rentals with linked items that have Lot Tracking, which is outlined in the chapter, How to Set Up an Item Tracking Codes for Lot No. Tracking.

The purchasing of the item with Lot Tracking is done using the standard processes and is not covered here.

Once the Item has been setup, then it is linked to the Rental Unit on the Link tab selecting the Type Item, and then selecting the Item in the Link Code.

This feature can be used with Locations, whether Inventory Setup has the field Location Mandatory enabled or not.

When Locations are used, then the entry of units linked to Items with Lot tracking requires the selection of the Item Lot Nos. in the Item Tracking Lines, which is accessed from the Rental Line menu option, Line, Item Tracking Lines.

The rental Item Tracking Lines are similar to the sales Item Tracking Lines and contain the same menu options. The main differences are that on the lines the rental fields, Qty. to Rent and Qty. to Return are displayed. And the Qty. to Handle, Qty to Invoice (Base) and Appl.-to Item Entry fields are not displayed. The Lot No. field is displayed when the Rental Unit is linked to an Item which has an Item Tracking Code with Rental Lot Tracking enabled.

When an organization is using Expiration Dates, then it is recommended that the Expiration Date field be added to the Item Tracking Lines page and the Item Tracking-Select Entries page using Personalize.



IMPORTANT

If after selecting the Item Tracking Entry(s), the Item Tracking Line(s) is deleted, the Item Tracking Lines must be closed and re-opened in order to update the Transfer Order, which updates the Item Inventory Availability, before running the Select Entries or lookup in the Lot No. field on the lines.

Should this not be done, then the Select Entries page will display incorrect data.

The Transfer Order, Rental Item Tracking Lines will be updated when the Lot Nos. have been selected and the Item Tracking Lines page is closed. The posting of the rental unit shipment will automatically post the Transfer Order, updating the inventory.

When used without Locations, the availability of the item is not updated, as no transfer order is created or posted.

For information on the setup of rental locations, see ODT Rental Online Help, Setup Rentals, Setup Rental Locations.

For information on the setup of Rental Management Setup for processing rentals, when an Item is linked to a Rental Unit, see ODT Rental Online Help, Setup Rentals, How to Set Up Rental Management Setup.

For additional information, see Processing Rentals, Processing Rentals with Units Linked to Items and How to Process Contracts When Units are Linked to Items.

3.8.4.2. How to Set Up an Item Tracking Code for Lot No. Rentals

The ODT Rentals supports the following setups of Item Tracking Codes for Lot No. tracking for use with rentals:

- Lot Tracking with Use Expiration Dates disabled
- Lot Tracking with Use Expiration Dates enabled
- Lot Tracking with Use Expiration Dates and Strict Expiration Posting enabled When entering or selecting Item Tracking Lines and the Use Expiration Dates field is enabled and the Strict Expiration Posting is disabled, then the entry will be allowed. No informational message will occur.

When entering or selecting Item Tracking Lines and the Use Expiration Dates and the Strict Expiration Posting fields are enabled, then the following scenarios will result in an information message.

Example of the message: The selected Lot BGL0T-00004 will expire during the rental period or duration of the rental line. Shipment will not be allowed, if the Lot has expired before the shipment posting date. Ok.

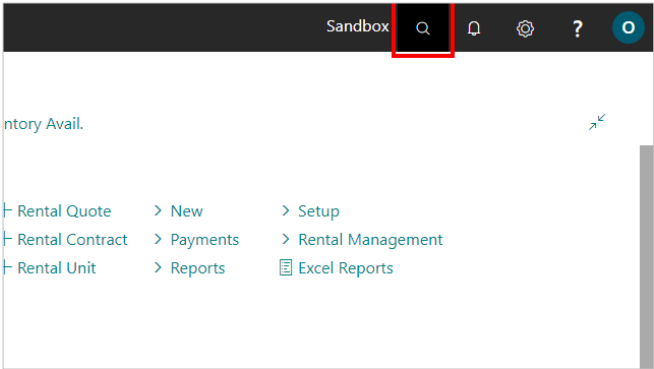
- Selection of a Lot No. that has an Expiration Date that is equal to or before Posting Date on contract. The Lot No. will need to be changed as will result in the shipment of the Rental Unit being disallowed. An error will occur. Example of error: Expiration Date is before the posting date in Reservation Entry Entry No.='430',Positive='No'.
- Selection of a Lot that has an Expiration date later than the Posting Date on the contract, however, will expire equal to or before the Rental Return Date on the rental line. The user can choose to leave the Lot No. as selected and the shipment will be allowed.
- When the Rental Return Date is blank on the Rental Line and the selection of a Lot No. that will expire equal to or before the end of the first rental period of the term on the Rental Line. The user can choose to leave the Lot No. as selected and the shipment will be allowed.

3.8.4.2.1. Item Tracking Code for Lot Tracking with Use Expiration Dates Disabled

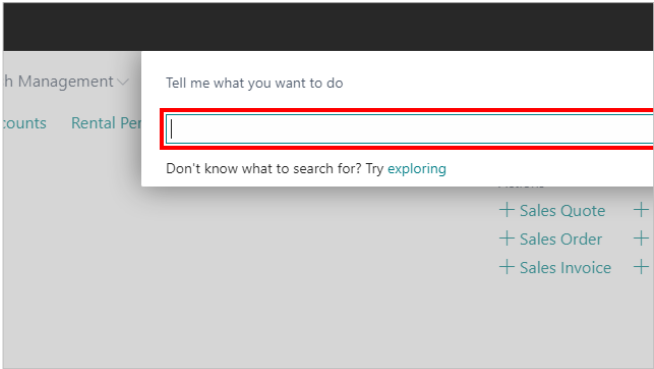
The following demonstrates the setup of an Item Tracking Code for Items with Lot Tracking that will be linked to a Rental Unit with the Use Expiration Dates disabled.



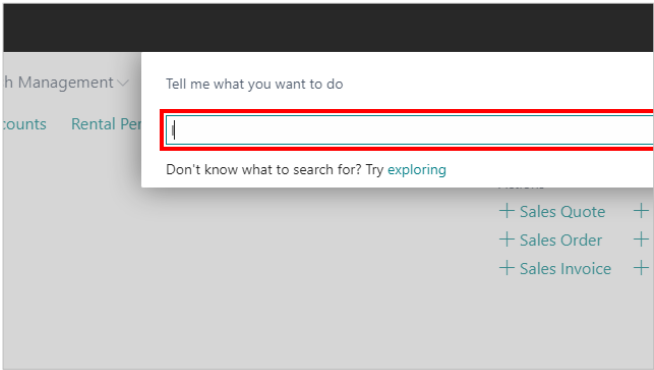
Click on the link **Search**



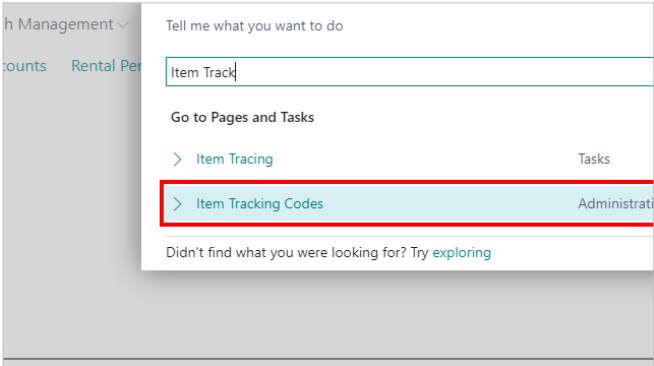
Click on the field **Tell me what you want to do**



Enter the text **Item Track**.



Click on **Item Tracking Codes Administration** ☐





Click on the navigation menu item **New**

The screenshot shows the 'Item Tracking Codes' screen with a work date of 4/12/2021. A red box highlights the '+ New' button in the top right corner. Below the button is a 'Create a new entry.' link. A table of existing codes is visible below the button.

Code ↑	Description
→ FREEENTRY	Free entry
LOTALL	Lot specif
LOTALLEX	Lot specif
LOTSNSALES	Lot specif
RENTSNALL	Rental Tra
SNALL	SN specif

Click on the field **Code**

The screenshot shows the 'Code Card' form. A red box highlights the 'Code' field, which is preceded by a red asterisk indicating it is a required field.

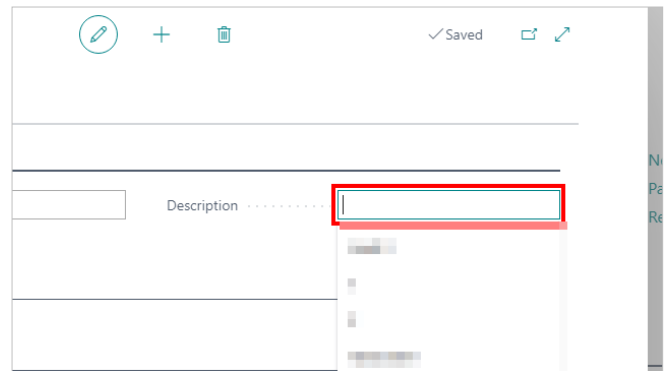
Enter the text **RENTLOT**.

This screenshot is identical to the previous one, showing the 'Code Card' form with the 'Code' field highlighted by a red box.

Click on the field **Description**

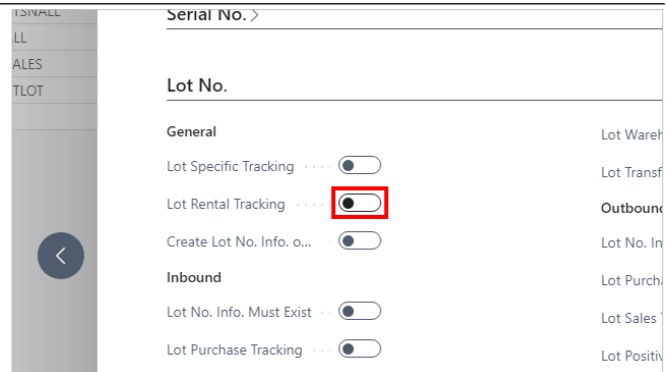
The screenshot shows the 'Code Card' form with the 'Description' field highlighted by a red box. The field is preceded by a red asterisk, indicating it is a required field. The top of the form shows a 'Saved' status and some icons.

Enter the text **Rental Lot Tracking**.



Click on the toggle field **Lot Rental Tracking**

The enabling of the Lot Rental Tracking field is mandatory for processing rentals. When enabled then other fields on the Lot No. tab are automatically enabled.



When an organization is using Lot tracking and be combined the use of Bins in the rental location(s), then it is recommended to enable the Lot Warehouse Tracking so that the Lot Nos. are included in the Warehouse Entries.

3.8.4.3. Processing Contracts with Rental Units Linked to Items with Lot Tracking

3.8.4.3.1. Overview of Example

The example on the entry of Rental Units linked to Items with Lot Tracking includes the:

- Entry of a Rental Unit where Lot Tracking, Use Expiration Dates is Disabled
- Entry of a Rental Unit where Lot Tracking, Use Expiration Dates is Enabled
- Entry of a Rental Unit where Lot Tracking, Use Expiration Dates and Strict Expiration Posting Enabled

Setups which have been completed for the example that follows include:

- Both Inventory Setup and Rental Management Setup have the field, Location Mandatory enabled. Therefore, the Transfer Orders with be indirect transfers.
- Item Tracking Codes have been setup which have the above configurations.
- The Items have been setup with the various Item Tracking Codes and purchases have been processed.
- Rental Units have been setup and linked to the Items.

The Rental Units and Items setup for the example are as follows:

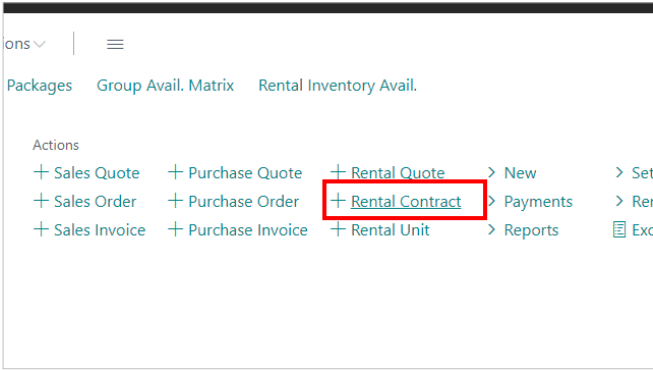
- Rental Unit No. is RU00032. The unit is linked to Item 1006, Series 10 Sucker Rod Overshot with Item Tracking Code, RENTLOT, which has the User Expiration Dates field disabled.
- Rental Unit No. is RU00033. The unit is linked to Item 1007, Basket Grapple with Item Tracking Code, RENTLOTTEX1, which has the User Expiration Dates field enabled and the Strict Expiration Posting field disabled.
- Rental Unit No. is RU00034. The unit is linked to Item 1008, Spiral Grapple with Item Tracking Code, RENTLOTTEX2, which has the User Expiration Dates and Strict Expiration Posting fields enabled.

Rental Prices were setup on the Rental Units for daily rentals and monthly rentals with invoicing in arrears (Periodic End)

3.8.4.3.2. Entry of Rental Units linked to Items with Lot Tracking

The following demonstrates the creation of a Rental Contract and the entry of the Rental Units linked to Items with the various Item Tracking Code settings, as noted in the Overview chapter.

Click on the navigation menu item **Rental Contract**



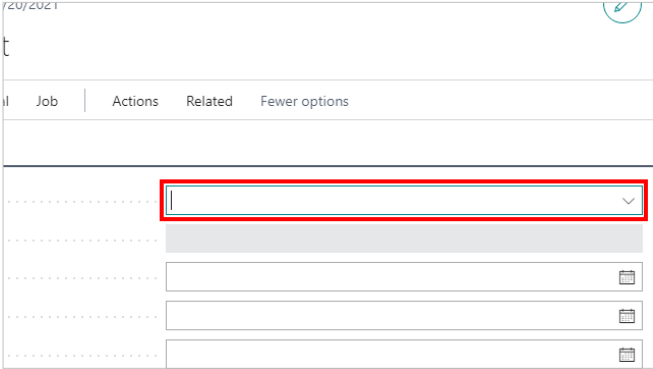
ons ▾ | ≡

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	Exc

Click on the field **Sell-to Customer Name**



7/20/2021

t

il Job Actions Related Fewer options

.....

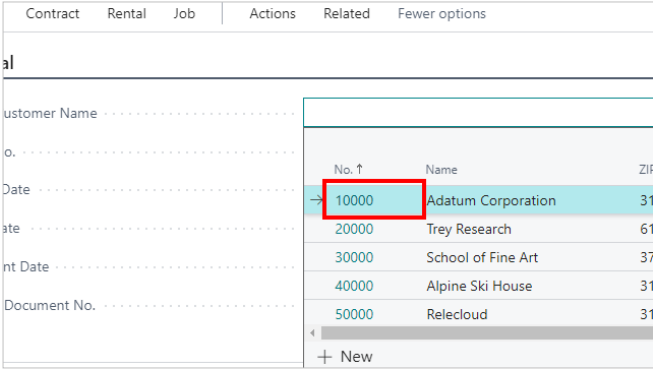
.....

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.....

.....

Click on the link in cell **No.** with the value **10000**



Contract Rental Job Actions Related Fewer options

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Date

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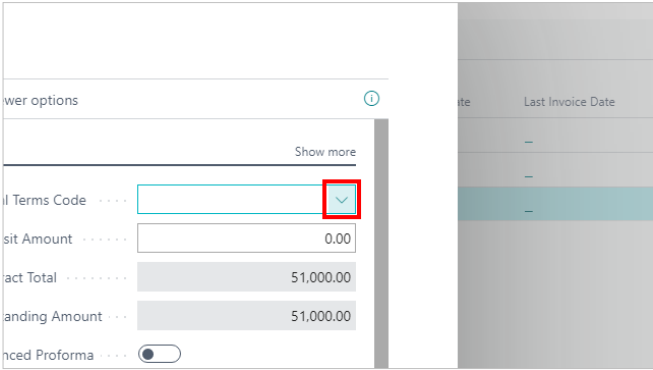
nt Date

Document No.

No. ↑	Name	ZIP
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New

Click on the lookup button **Rental Terms Code**



wer options ⓘ

Show more

l Terms Code ▾

sit Amount 0.00

act Total 51,000.00

anding Amount ... 51,000.00

nced Proforma ☐

ODT Rentals Online Help

Click on the link in cell **Code** with the value **MONTH-PEND**

[illegible]

Click on the cell **Rental Unit No.**

External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→			

Sales Lines | Manage | Line | Fewer options

Click on the lookup button in the cell **Rental Unit No.**

The Rental Unit selected is linked to an Item with the Item Tracking Code, RENTLOT, that the Use Expiration Dates is not enabled.

External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
→ <input type="text"/>	...		
Rental Quote Job (R-S-L)			

Sales Lines | Manage | Line | Fewer options

Click on the link in cell **No.** with the value **RU00032**

RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
→ PG-001	Portable Generators	<input type="checkbox"/>
RU00007	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 1/2 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
RU00032	Series 10 Sucker Rod Overshot	<input type="checkbox"/>
RU00033	Basket Grapple	<input type="checkbox"/>
RU00034	Spiral Grapple	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>

Once the Rental Unit is selected on the Rental Line, the Rental Inventory Availability matrix can be accessed by selecting the Rental Line menu option Manage, Rental Inventory Availability to review the rental projected available balance of the Item that is linked to the unit on a by day basis.

To learn about the Rental Inventory Availability matrix, see ODT Rental Online Help, Processing Rentals, Processing Rentals Overview.



ODT Rentals Online Help

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

External Document No.

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	Rental Quantity		
→ RU00032 ...		Series 10 Sucker Rod Overshot	MONTH-PEND	0		

Sales Lines | Manage | Line | Fewer options

Click on the cell **Rental Quantity** with the value **0**

Functions		Related	Fewer options		
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	
Series 10 Sucker Rod Overshot	NTH-PEND	0			

Fewer options

Enter the text **2**.

Functions		Related	Fewer options		
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	
Series 10 Sucker Rod Overshot	MONTH-PEND				

Fewer options

Click on the cell **Location Code**

Related		Fewer options				
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R/D
r Rod Overshot	MONTH-PEND	2				4/



Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Overshot	MONTH-PEND	2			4/20/20
		RC00078			
		→ CENTRAL	Central Warehouse		
		EAST	East Warehouse		
		RENTRESERV	Inventory Items Rental Rese		
		SOUTH	South Warehouse		
		TEMP	Temporary Location		
		+ New			

Click on the navigation menu item popup **Line**

Posting Date	4/20/2021	Contract Total
Order Date	4/20/2021	Outstanding Am
Document Date	4/20/2021	Advanced Profo
External Document No.		

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code		
→ RU00032		Series 10 Sucker Rod Overshot	MONTH-PEN		

Click on the navigation menu item **Item Tracking Lines**

The process of selecting entries in the Item Tracking Lines for Items with Lot Tracking is the same as when selling Items with Lot Tracking.

Date	4/20/2021	Outstanding Amount
ent Date	4/20/2021	Advanced Proforma
l Document No.		

Lines	Manage	Line	Functions	Related	Fewer options
Rental Amount Lines	View Rental Calendar	Item Tracking Lines	Attachments		
Rental Ledger Entries	Metered Usage Entries	Additional Notes	Rental Prices		
Rental Value Entries	Periodic Usage Entries	Dimensions			

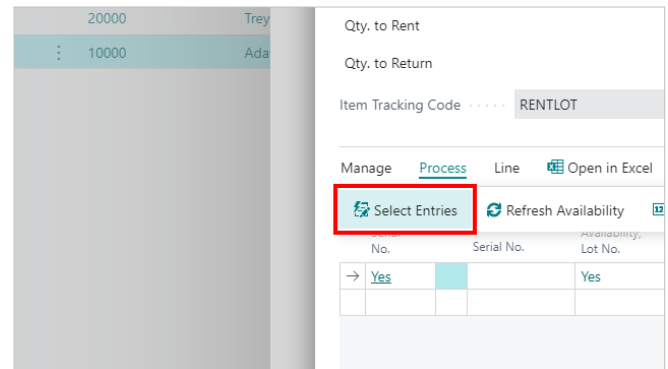
Click on the navigation menu item popup **Process**

10000	Ada
20000	Trey
10000	Ada

Quantity	
Qty. to Rent	
Qty. to Return	
Item Tracking Code	RENTLOT

Manage	Process	Line	Open in Excel	Acti
Availa... Serial No.	Serial No.	Availability, Lot No.	Lot No.	
→ Yes		Yes		

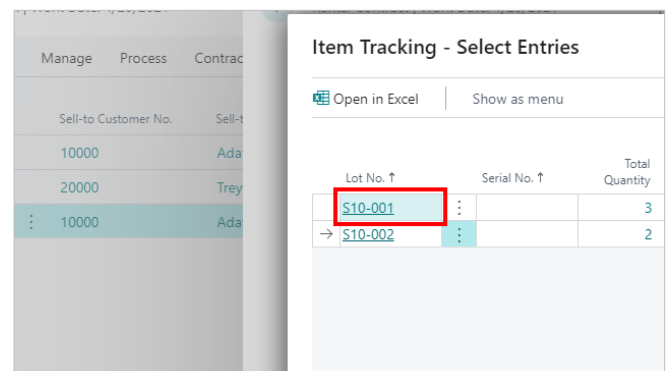
Click on the navigation menu item **Select Entries**



The screenshot shows a sidebar with a list of items (20000, 10000, etc.) and a main panel. In the main panel, the 'Select Entries' button is highlighted with a red box. Other buttons visible include 'Manage', 'Process', 'Line', 'Open in Excel', and 'Refresh Availability'.

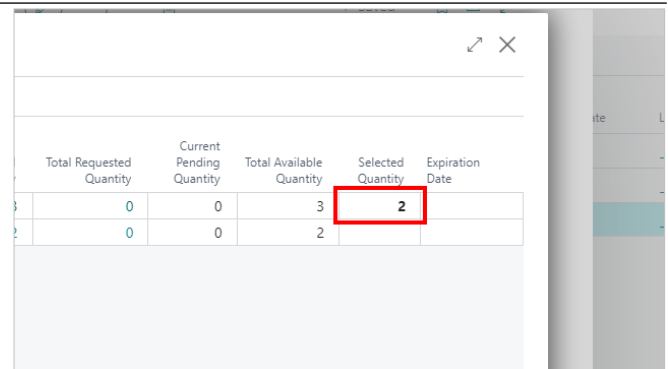
The suggested Lot No. and Selected Quantity can be accepted, changes or modified.

Click on the link in cell **Lot No.** with the value **S10-001**



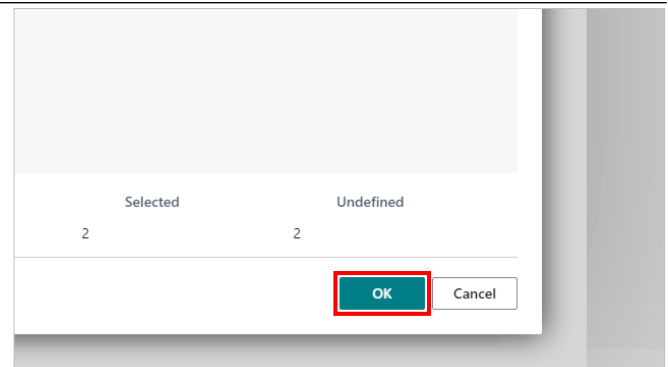
The screenshot shows the 'Item Tracking - Select Entries' dialog box. It has tabs for 'Open in Excel' and 'Show as menu'. Below the tabs is a table with columns: 'Lot No. ↑', 'Serial No. ↑', and 'Total Quantity'. The first row shows 'S10-001' in the 'Lot No.' column, which is highlighted with a red box. The second row shows 'S10-002'.

Click on the cell **Selected Quantity** with the value **2**



The screenshot shows the 'Item Tracking - Select Entries' dialog box. It has a table with columns: 'Total Requested Quantity', 'Current Pending Quantity', 'Total Available Quantity', 'Selected Quantity', and 'Expiration Date'. The 'Selected Quantity' column has a value of '2' in the first row, which is highlighted with a red box.

Click on the button **OK**



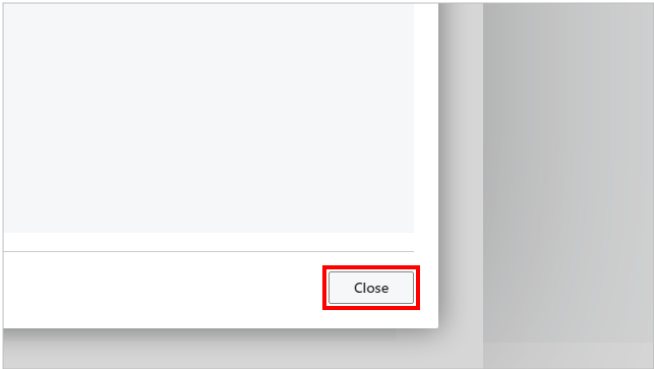
The screenshot shows the 'Item Tracking - Select Entries' dialog box. It has a table with columns: 'Selected' and 'Undefined'. The 'Selected' column has a value of '2' in the first row. Below the table is an 'OK' button, which is highlighted with a red box.

IMPORTANT

If after selecting the Item Tracking Entry(s), the Item Tracking Line is deleted, the Item Tracking Lines must be closed and re-opened in order to update the Transfer Order, which updates the Item Inventory Availability, before running the Select Entries or lookup in the Lot No. field on the lines. Should this not be done, then the Select Entries page will display incorrect data.

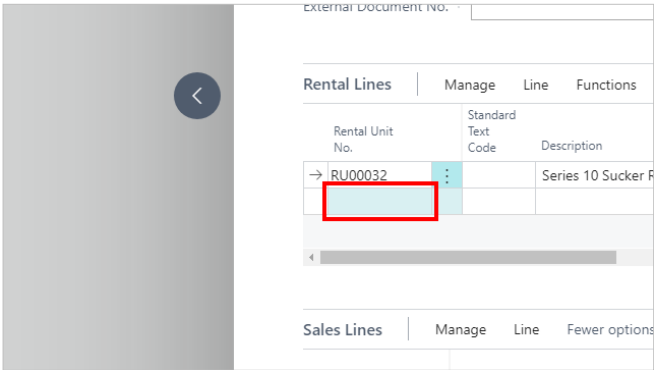


Click on the button **Close**

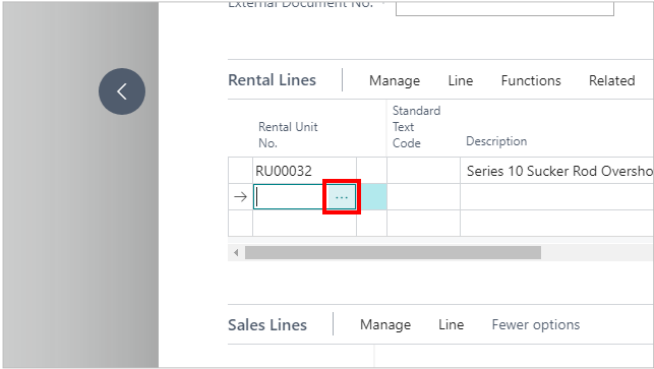


The next Rental Unit that will be selected is linked to an Item that has the Item Tracking Code, RENTLOTEX1, which has the Use Expiration Dates enabled and the Strict Expiration Posting disabled.

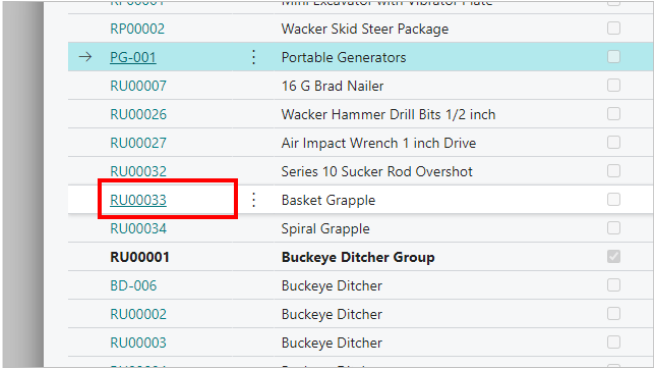
Click on the cell **Rental Unit No.**



Click on the lookup button in the cell **Rental Unit No.**



Click on the link in cell **No.** with the value **RU00033**





ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options	
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Series 10 Sucker Rod Overshot	MONTH-PEND	2	EAST	
Basket Grapple	MONTH-PEND	0		
Fewer options				

Enter the text **2**.

Line	Functions	Related	Fewer options	
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Series 10 Sucker Rod Overshot	MONTH-PEND	2	EAST	
Basket Grapple	MONTH-PEND	2		
Fewer options				

Click on the cell **Location Code**

Functions	Related	Fewer options	
Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Sucker Rod Overshot	MONTH-PEND	2	EAST
Grapple	MONTH-PEND	2	
Fewer options			

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Terms Code Alt1	Terms Code
Sucker Rod Overshot	MONTH-PEND	2	EAST	
	MONTH-PEND	2		
Location Code				
Code ↑				
Name				
→ CENTRAL Central Warehouse				
EAST East Warehouse				
REN Select record "EAST" Inventory Items Rental Rese				
SOUTH South Warehouse				
TEMP Temporary Location				
+ New				



Click on the navigation menu item popup **Line**

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Am

Document Date 4/20/2021 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00032		Series 10 Sucker Rod Overshot	MONTH-PEN
→ RU00033	:	Basket Grapple	MONTH-PEN

Click on the navigation menu item **Item Tracking Lines**

Date 4/20/2021 Outstanding Amount
ent Date 4/20/2021 Advanced Proforma
l Document No.

Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Amount Lines View Rental Calendar **Item Tracking Lines** Attachments
Rental Ledger Entries Metered Usage Entries Additional Notes Rental Prices
Rental Value Entries Periodic Usage Entries Dimensions

Click on the navigation menu item popup **Process**

10000	Ada
20000	Trey
10000	Ada

Quantity

Qty. to Rent

Qty. to Return

Item Tracking Code RENTLOTEX1

Manage | **Process** | Line | Open in Excel | Acti

Availa...
Serial No. Serial No. Availability, Lot No. Lot No.

→ Yes Yes

Click on the navigation menu item **Select Entries**

20000	Trey
:	10000
Ada	

Qty. to Rent

Qty. to Return

Item Tracking Code RENTLOTEX1

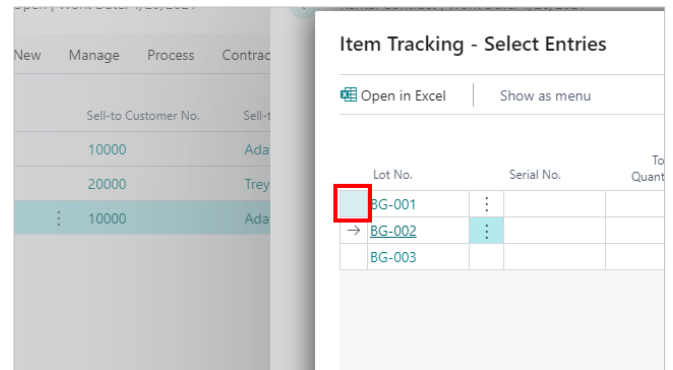
Manage | **Select Entries** | Line | Open in Excel

Refresh Availability

No. Serial No. Lot No.

→ Yes Yes

Click on **Lot No. = BG-001**

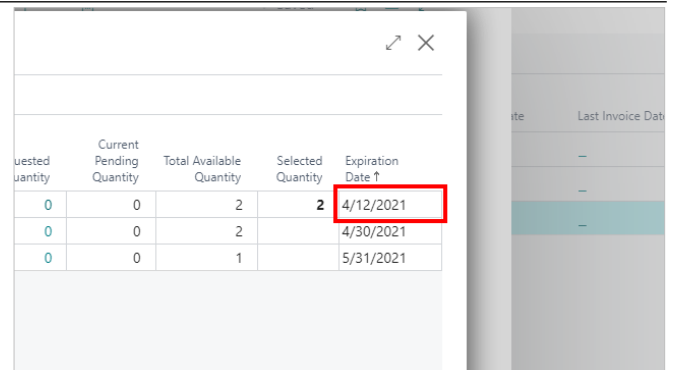


Lot No.	Serial No.	To Quant
BG-001	BG-002	BG-003

Click on the cell **Expiration Date** with the value **4/12/2021**

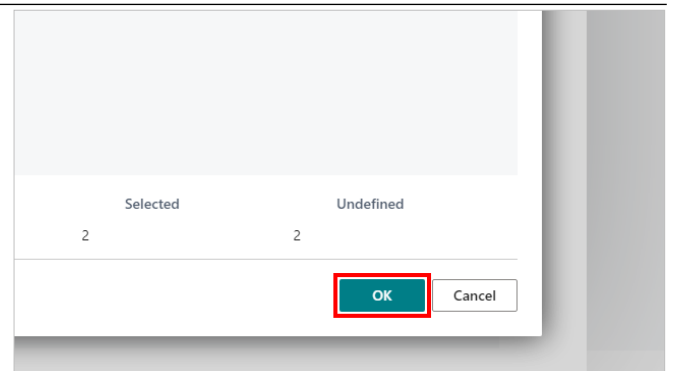
Note that the suggested entry line has an Expiration Date of April 12 which is later than the Rental Start Date of April 20.

The suggested entry can be accepted as on the Item Tracking Code specified on the Item card, the Strict Expiration Posting is disabled. Or can be changed to a Lot No. which has an expiry date that is later than the Rental Start Date on the Rental Line.



Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date ↑
0	0	2	2	4/12/2021
0	0	2		4/30/2021
0	0	1		5/31/2021

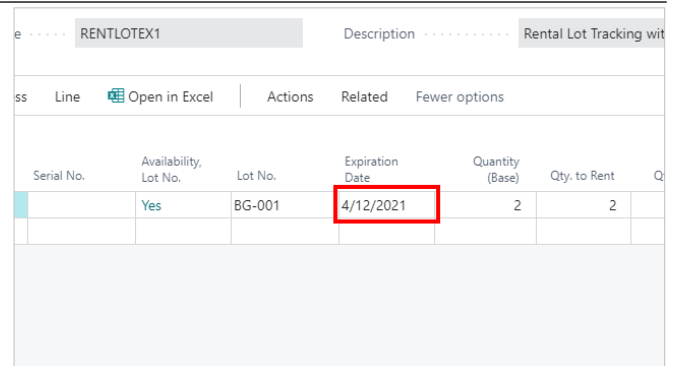
Click on the button **OK**



Selected	Undefined
2	2

Click on the cell **Expiration Date** with the value **4/12/2021**

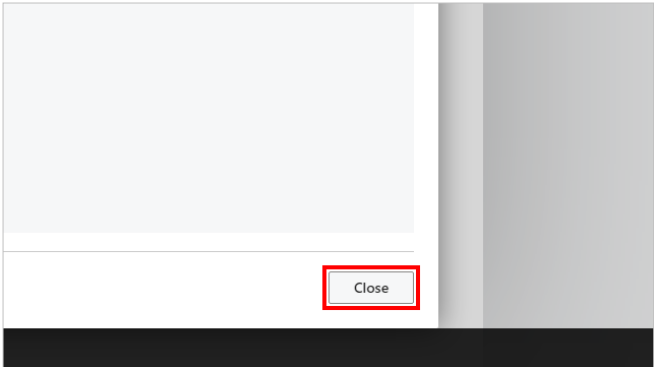
Note that the selected entry with the Expiration Date of April 12 was accepted and that no informational message regarding the Expiration Date occurred. Shipping of the Rental Unit and transfer of the Item to the Rental Inventory Location (On Rent/Reserved) will be allowed.



Serial No.	Availability, Lot No.	Lot No.	Expiration Date	Quantity (Base)	Qty. to Rent	Qty.
	Yes	BG-001	4/12/2021	2	2	Qty.



Click on the button **Close**

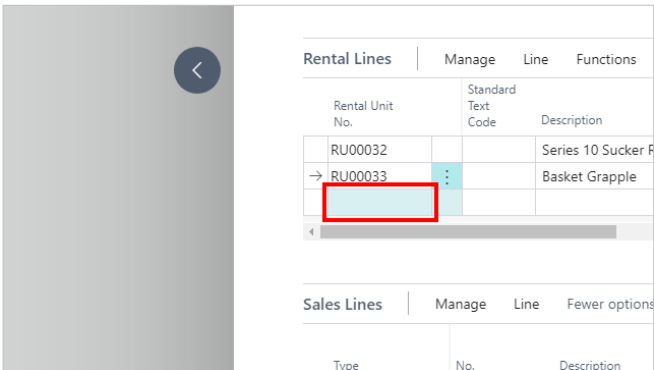


The next Rental Unit that will be selected is linked to an Item that has the Item Tracking Code, RENTLOTEX2, which has the Use Expiration Dates and the Strict Expiration Posting enabled.

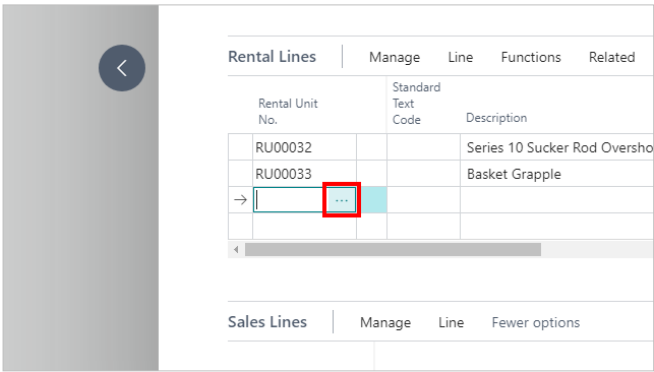
For this example, first a Lot No. with an Expiration Date that is later than the Posting Date on the contract will be selected to demonstrate the message that will occur.

Then the Item Tracking Line will be deleted and a Lot No. with an Expiration Date that is after the Posting Date, but will expire during the rental duration of the contract will be selected.

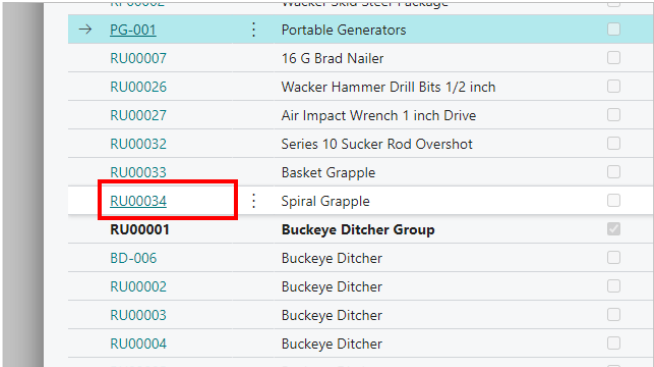
Click on the cell **Rental Unit No.**



Click on the lookup button in the cell **Rental Unit No.**






Click on the link in cell **No.** with the value **RU00034**







ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options							
Description		Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code				
Series 10 Sucker Rod Overshot		MONTH-PEND	2	EAST						
Basket Grapple		MONTH-PEND	2	EAST						
Spiral Grapple		MONTH-PEND	0							
										
ne	Fewer options									
										Unit of Unit of

Enter **Rental Quantity**.

Line	Functions	Related	Fewer options				
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code		
Series 10 Sucker Rod Overshot	MONTH-PEND	2	EAST				
Basket Grapple	MONTH-PEND	2	EAST				
Spiral Grapple	MONTH-PEND	<div></div>					
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Click on the cell **Location Code**

Actions	Related	Fewer options				
		Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code
Sucker Rod Overshot		MONTH-PEND	2	EAST		
Grapple		MONTH-PEND	2	EAST		
Grapple		MONTH-PEND	2			

Click on the link in cell **Code** with the value **EAST**

Code	Quantity	Code	Code Alt1	Code
Sucker Rod Overshot	MONTH-PEND	2	EAST	
	MONTH-PEND	2	EAST	
	MONTH-PEND	2		

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

+ New



Click on the navigation menu item popup **Line**

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Am

Document Date 4/20/2021 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00032		Series 10 Sucker Rod Overshot	MONTH-PEN
RU00033		Basket Grapple	MONTH-PEN
→ RU00034		Spiral Grapple	MONTH-PEN

Click on the navigation menu item **Item Tracking Lines**

Date 4/20/2021 Outstanding Amount
ent Date 4/20/2021 Advanced Proforma
l Document No.

Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Amount Lines View Rental Calendar **Item Tracking Lines** Attachments

Rental Ledger Entries Metered Usage Entries Additional Notes Rental Prices

Rental Value Entries Periodic Usage Entries Dimensions

RU00034		Spiral Grapple	MONTH-PEN	2	EAST
---------	--	----------------	-----------	---	------

Click on the navigation menu item popup **Process**

10000	Ada
20000	Trey
10000	Ada

Quantity

Qty. to Rent

Qty. to Return

Item Tracking Code RENTLOTEX2

Manage | **Process** | Line | Open in Excel | Acti

Availa...
Serial No. Serial No. Availability, Lot No. Lot No.

→ Yes Yes

Click on the navigation menu item **Select Entries**

20000	Trey
10000	Ada

Qty. to Rent

Qty. to Return

Item Tracking Code RENTLOTEX2

Manage | **Select Entries** | Line | Open in Excel

Refresh Availability

No. Serial No. Lot No.

→ Yes Yes

Click on the cell **Expiration Date** with the value **4/12/2021**

Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date ↑
0	0	1	1	4/12/2021
0	0	2	1	4/30/2021
0	0	2		5/31/2021

Click on the button **OK**

Selected	Undefined
2	2
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

An informational message will occur for both of the Lot. Nos selected due to the Expiration Dates of the Lots.

As the first Lot No. Expiration Date is earlier than the Posting Date on the Contract, shipping of the Rental Unit will not be allowed. A different Lot No. must be selected.

The second Lot No. Expiration Date is later than the Posting Date, however the Lot will expire during the rental duration of the contract. The shipping of the Rental Unit will be allowed. Whether the Lot No. is to be changed or kept will be based on the organizations policy related.

Click on the button **OK**

Availability	Expiration	Quantity	to Rent	Qty. to Return
			1	1
			1	1

The selected Lot SG-001 will expire during the rental period or duration of the rental line. Shipment will not be allowed, if the Lot has expired before the shipment posting date.

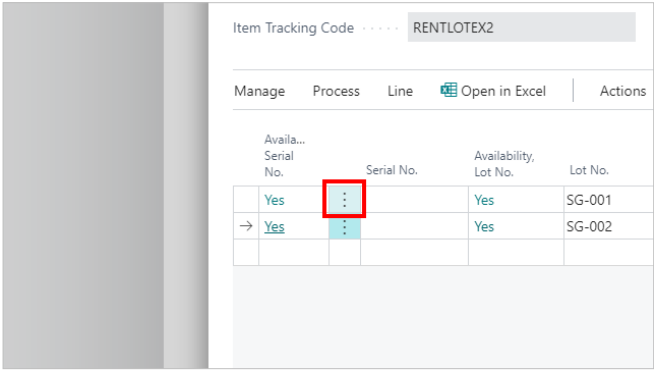
Click on the button **OK**

Availability	Expiration	Quantity	to Rent	Qty. to Return
			1	1
			1	1

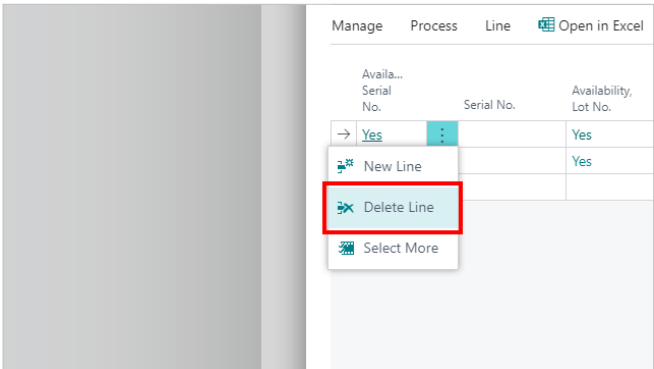
The selected Lot SG-002 will expire during the rental period or duration of the rental line. Shipment will not be allowed, if the Lot has expired before the shipment posting date.

The following demonstrates the changing of the first Lot No. selected to a Lot No. which will not expire during the rental duration of the contract.

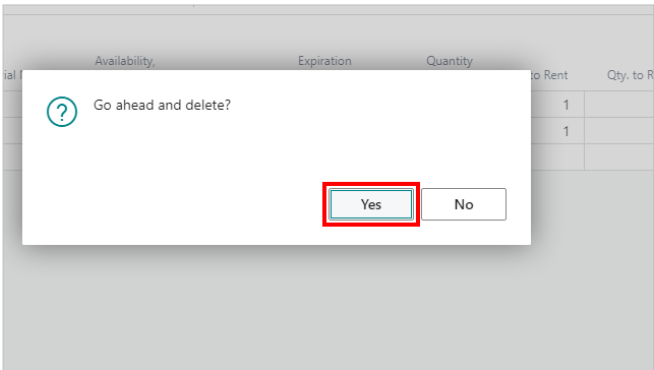
Click on the row menu button



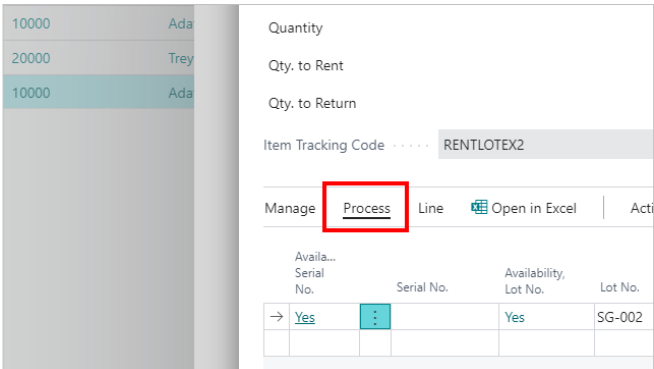
Click on the menu item **Delete Line**



Click on the button **Yes**



Click on the navigation menu item popup **Process**





Click on the navigation menu item **Select Entries**

20000 Trey
10000 Ada

Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOTEX2

Manage Process Line Open in Excel

Select Entries Refresh Availability

No. Serial No. Lot No.

→ Yes : Yes

Click on the cell **Selected Quantity** with the value 1

Total Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date ↑
0	0	1	1	4/12/2021
0	1	1		4/30/2021
0	0	2		5/31/2021

Enter the text 0.

Total Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date ↑
0	0	1	0	4/12/2021
0	1	1		4/30/2021
0	0	2		5/31/2021

Click on the cell **Selected Quantity**

Total Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date ↑
0	0	1	0	4/12/2021
0	1	1		4/30/2021
0	0	2		5/31/2021



Enter the text **1**.

	Total Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date †
1	0	0	1		4/12/2021
2	0	1	1		4/30/2021
2	0	0	2	1	5/31/2021

Click on the button **OK**

Selected		Undefined	
1	0	1.00	
		OK	Cancel

Click on the cell **Expiration Date** with the value **5/31/2021**

Note that no message occurred when the Lot No. with an Expiration Date later than the Rental Return Date was selected.

Serial No.	Availability, Lot No.	Lot No.	Expiration Date	Quantity (Base)	Qty. to Rent	Q
	Yes	SG-002	4/30/2021	1	1	
	Yes	SG-003	5/31/2021	1	1	

Click on the button **Close**

		Close
--	--	--------------

The Rental Contract is now ready for shipping, invoicing and returning the Rental Units. The standard rental processing steps are used.

When the total Rental Quantity is to be shipped and returned, there are no additional or different processes to be done when units are linked to Items with Lot Tracking.

NOTE:

When partial shipments or partial returns need to be processed, then there are specific processing steps to be followed.

To learn about processing partial shipments and partial returns for Rental Units linked to Items with Lot



Tracking, see ODT Rental Online Help, Processing Rentals, Partial Shipments and Returns.

3.8.4.3.3. Processing the Shipment, Invoicing and Return

Click on the field **Posting Date**

The screenshot shows a 'Rental Contract' form with a navigation bar at the top containing 'Process', 'Contract', 'Rental', 'Job', 'Actions', 'Related', and 'Fewer'. The 'General' section includes fields for 'Sell-to Customer Na...' (Adatum Corporation), 'Quote No.', 'Posting Date' (4/20/2021), 'Order Date' (4/20/2021), 'Document Date' (4/20/2021), and 'External Document No.'. The 'Posting Date' field is highlighted with a red box, and a tooltip indicates the date format M/d/yyyy.

Click on the navigation menu item popup **Rental**

This screenshot shows the 'Rental Contract' form with the 'Rental' menu item in the navigation bar highlighted with a red box. The form details are consistent with the previous screenshot, showing the 'Posting Date' as 4/20/2021.

Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'Rental Contract' form with the 'Ship Rentals' menu item in the navigation bar highlighted with a red box. A dropdown menu is visible, showing options: 'Ship Rentals', 'Return and Send...', 'Ship', 'Return Rentals', and 'Invoice'. The 'Ship Rentals' option is also highlighted with a red box.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. It has two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box. In the background, a table lists rental items: 'Basket Grapple' and 'Spiral Grapple', both with a status of 'MONTH-PEND' and a quantity of '2'.



ODT Rentals Online Help

Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

	Rental Terms Code Alt1	Rental Terms Code Alt2
Basket Grapple	MONTH-PEND	2 EAST
Spiral Grapple	MONTH-PEND	2 EAST

Click on the field **Posting Date**

The Posting Date must be set to a date equal to or later than the applicable Rental Amount Line, Billing Date.

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental Terms Code Alt1 MONTH-PEND

Quote No. Deposit Amount

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Amount

Document Date 4/20/2021 Advanced Proforma

External Document No.

Click on the link **Open the date picker for Posting Date**

Process Contract Rental Job Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental Terms Code Alt1 MONTH-PEND

Quote No. Deposit Amount

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Amount

Document Date 4/20/2021 Advanced Proforma

External Document No.

Click on the link **Next**

General

Customer Na... Adatum Corporation Rental Terms Code Alt1 MONTH-PEND

Quote No. Deposit Amount

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Amount

Document Date 4/20/2021 Advanced Proforma

External Document No.

Next



Click on a date in the calendar

Rental Unit No.	Description	Rental Terms	Ren
RU00032	Series 10 Sucker Rod Overshot	MONTH-PEND	Quant
RU00033	Basket Grapple	MONTH-PEND	

Click on the navigation menu item popup **Rental**

Rental Contract · RC00003

Process Contract **Rental** Job Actions Related Few

General

Sell-to Customer Na... Adatum Corporation

Quote No.

Posting Date 5/19/2021

Click on the navigation menu item **Invoice**

Rental Contract · RC00003

Process Contract Rental Job Actions Related Few

Ship Rentals Return and Send... Invoice and Print

Ship and Send... Bulk Returns Invoice and Send...

Return Rentals **Invoice** Posted Deliveries

Posting Date 5/19/2021

Order Date 4/20/2021

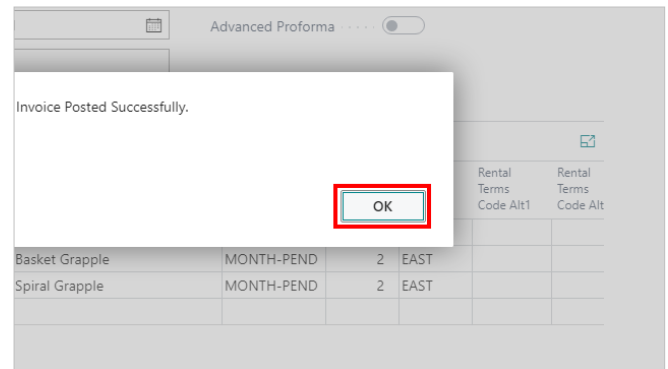
Document Date 5/19/2021

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

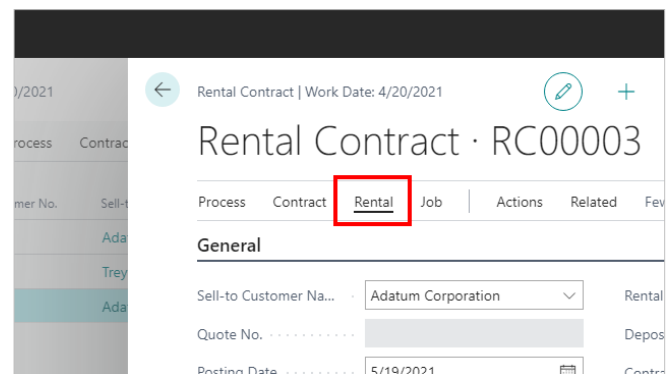
Click on the button **OK**



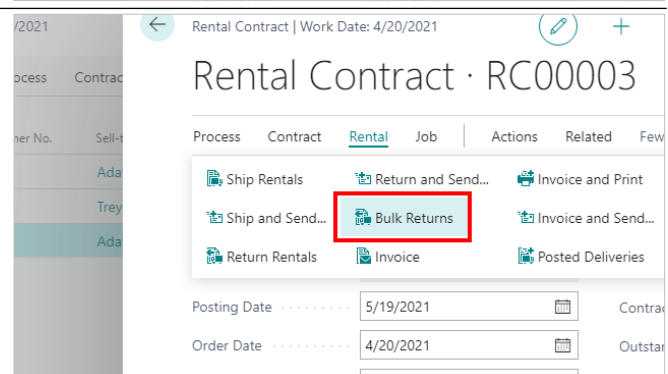
When returning Rental Units from a contract, if all units are to be returned on the same date for the full quantity in the On Rent field, then using the Bulk Returns menu option is suggested as updates the Qty. to Return on all rental lines.

If preferred the user can enter the Qty. to Return on each Rental Line.

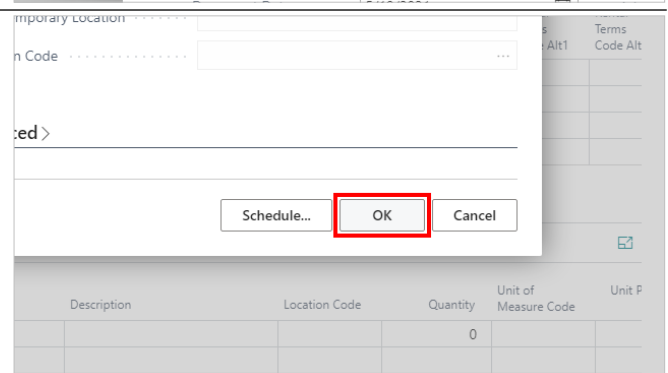
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Bulk Returns**



Click on the button **OK**



Click on the cell **Qty. to Return** with the value **2**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options			
Rental Unit No.		Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Tran... Order No
→ RU00032	:	0	2	2	0	0	<input checked="" type="checkbox"/>	1009
RU00033		0	2	2	0	0	<input checked="" type="checkbox"/>	1010
RU00034		0	2	2	0	0	<input checked="" type="checkbox"/>	1011

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/20/2021

Rental Contract · RC00003

Process Contract **Rental** Job Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation

Quote No.

Posting Date 5/19/2021

Click on the navigation menu item **Return Rentals**

New Manage Process Contract

Sell-to Customer No. Sell-to

10000 Ada

20000 Trey

10000 Ada

Rental Contract · RC00003

Process Contract **Rental** Job Actions

Ship Rentals Return and Send...

Ship and Send...

Return Rentals Bulk Returns Invoice

Posting Date 5/19/2021

Order Date 4/20/2021

Document Date 5/19/2021

Click on the button **Yes**

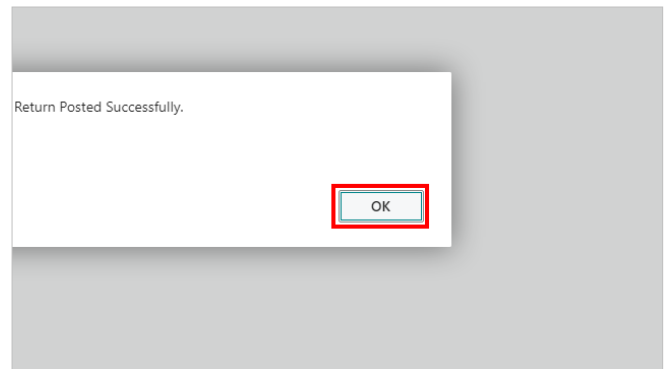
5/19/2021 Advanced Proforma

Are you sure you want to Return this rental contract?

Yes No

0	2	2	0	0	0	1010	SALES	SMA
0	2	2	0	0	0	1011	SALES	SMA

Click on the button **OK**



The Item entries created by the shipping and returning of the Rental Unit can be reviewed from the Item card, Related, History, Item Ledger Entries and Item Tracking Entries.

3.8.5. How to Process Contracts When Units are Linked to Items in Bins

3.8.5.1. Overview

Items which are stored in bins can be linked to a Rental Unit and rented out. The bin contents and inventory for the item are updated, when the unit is shipped and returned.

The sale of items from bins can be processed on the Sales Lines on the rental documents

Setups and configuration for processing rental contracts with Rental Units linked Items stored in Bins include the following:

- A rental Location that the unit and item will be transferred to when the unit is shipped, and then added to Inventory Rentals Location field on Rental Management Setup
- An Inventory Rentals In-Transit Location for indirect transfers, if Inventory Setup has the Location Mandatory field enabled. Once setup, then will need to be added to the Inventory Rentals In-Transit Location field on the Rental Management Setup.
- Rental locations that have the Bin Mandatory field enabled, the Default Bin Selection specified and the Bin Codes setup.
- The purchase of the item into the rental locations and bins that have Bin Mandatory enabled
- Linking the Item to the applicable Rental Unit
- Adding the Bin related fields to the Rental Lines on the Rental Contract, and if applicable Rental Quote
- Adding the Bin related fields to the Transfer Order Lines

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.

To learn about setting up the Locations noted above, see ODT Rental Online Help, Setup Rentals, Setup Rental Locations.

To learn about setting up Rental Management Setup, see ODT Rental Online Help, Setup Rentals, Financials Set Up for Rentals.

The Bin Code can be added to the Rental and Sales Lines on the Rental Quote and Contract using Personalize.

The entry of Rental Units linked to items, which are in a rental location that has Bin Mandatory enabled, will by default, populate the Bin Code field on the rental line, with the Default Bin Code. The Bin Code can be overridden to specify the Bin the Item is to be shipped from.

On the Transfer Order, the Transfer-From Bin Code and Transfer-To Bin Code fields can be added to the lines using Personalize. The Transfer-From Bin Code will be updated with the Bin Code from the rental line. With the



transfer being to the Rental Inventory Location the Transfer-To Bin Code field will not be populated.

When the Rental Unit is shipped the Transfer Order is posted creating posted Transfer Shipments, Posted Transfer Receipts, Item Ledger Entries and Item Warehouse Entries, which updates the Bin Contents on the Item.

When returning the Rental Unit, the linked item can be returned to a different Bin Code in the location it was shipped from.

In addition, the Rental Unit and linked item can be returned to a different rental location with the item being returned to a Bin in that location. When returning the Rental Unit and linked item to a temporary rental location the item will not be returned to a Bin.

On the Rental Lines, the Return Location Code, Return Bin Code and Return Temporary Location fields are available to add using Personalize.

To learn about returning to a different or temporary location, when Items in Bins are linked to Rental Units, see ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location.

To learn about processing partial shipments and partial returns, when Items in Bins are linked to Rental Units, see ODT Rental Online Help, Processing Rentals, Partial Shipments and Returns.

In addition the help in Processing Rentals, Pending Shipments and Returns demonstrates the processing of partial shipments and returns of Rental Units linked to Items stored in Bins from the To Ship and To Return cues.

NOTE:
The process of selecting a different Bin and shipment of Rental Unit can be completed from the To Ship list accessed from the cue on the Sales Order Processor profile.

The process of returning the Rental Unit linked to an Item stored in Bins can be accomplished from the To Return list accessed from the cue on the Sales Order Processor profile.

3.8.5.2. How to Process a Contract with a Unit Linked to an Item in Bins

The following example demonstrates the entry and processing of a contract with a Rental Unit linked to an Item stored in bins on the Rental Lines and an Item stored in bins on the Sales Lines.

Click on the navigation menu item **Rental Contract**

Rental TermsRental UnitsRental Packages

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

+ Rental Unit

> New

> Payments

> Reports

> R

E

Create a new rental contract for rental produ



ODT Rentals Online Help

Click on the field **Sell-to Customer Name**

The screenshot shows a web interface with a top navigation bar containing 'Actions', 'Navigate', and 'Fewer options'. Below the navigation bar, there is a form with several input fields. The first input field, labeled 'Sell-to Customer Name', is highlighted with a red rectangular box. Below this field, there are three more input fields, each with a calendar icon to its right.

Click on the link in cell **No.** with the value **10000**

The screenshot shows the same web interface as before, but with a dropdown menu open for the 'Sell-to Customer Name' field. The dropdown menu is titled 'RENT-CONT' and contains a list of records. The first record, with 'No.' 10000 and 'Name' Adatum Corporation, is highlighted with a red rectangular box. Below the list, there is a '+ New' button.

Click on the link in cell **No.** with the value **10000**

The screenshot shows the same web interface as before, but with a dropdown menu open for the 'Sell-to Customer Name' field. The dropdown menu is titled 'RENT-CONT' and contains a list of records. The first record, with 'No.' 10000 and 'Name' Adatum Corporation, is highlighted with a red rectangular box. Below the list, there is a '+ New' button.

Click on the cell **Rental Unit No.**

The screenshot shows a web interface with a top navigation bar containing 'Manage', 'Line', 'Functions', and 'Fewer options'. Below the navigation bar, there is a table with columns 'Rental Unit No.', 'Standard Text Code', 'Description', and 'Rental Term Code'. The first row of the table, with 'Rental Unit No.' 10000, is highlighted with a red rectangular box. Below the table, there is a '+ New' button.



Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows a table with columns: Rental Unit No., Standard Text Code, Description, and Rental Term Code. A red box highlights a dropdown arrow in the Rental Unit No. column, indicating a lookup function.

Click on the link in cell **No.** with the value **RU00026**

The screenshot shows a table titled 'RENTAL UNIT LIST' with columns: No. ↑, Description, and Group ↑. The row for 'RU00026' is highlighted with a red box. The table contains the following data:

No. ↑	Description	Group ↑
→ PG-001	Portable Generators	<input type="checkbox"/>
RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RU00007	165 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>

The following demonstrates reviewing the Rental Inventory Availability list which displays the item quantity available in all rental locations as of the users work date. A location filter can be applied, which will filter the quantity displayed in the Rental Avail. Inventory field to display the quantity for the specified rental location.

To learn about the Rental Inventory Availability list, see ODT Rental Online Help, Procoessing Rentals, Processing Rentals Overview.

Click on the navigation menu item popup **Manage**

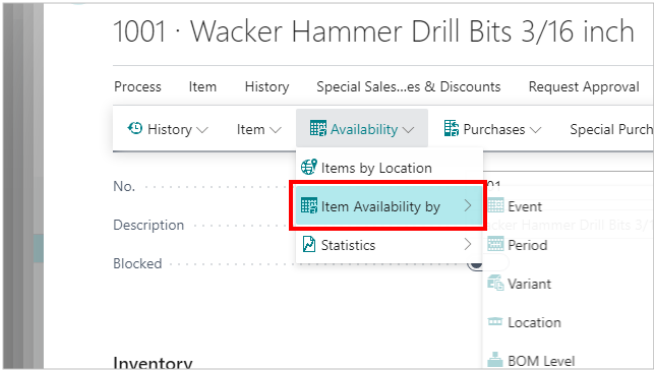
The screenshot shows a 'Manage' popup with fields for Posting Date, Order Date, and Document Date, all set to 5/5/2020. Below these fields is a table with columns: Rental Unit No., Standard Text Code, Description, and Rental Term Code. The row for 'RU00026' is highlighted with a red box.

Click on the navigation menu item **Rental Inventory Avail.**

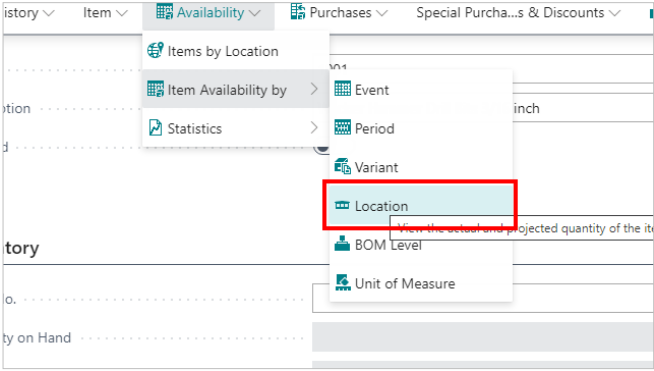
The screenshot shows a table with columns: Posting Date, Order Date, Document Date, Contract Tot, and Outstanding. The row for '5/5/2020' is highlighted. Below the table is a navigation menu with items: Collapse All, Group Avail Matrix, and Rental Inventory Avail. The 'Rental Inventory Avail.' item is highlighted with a red box.



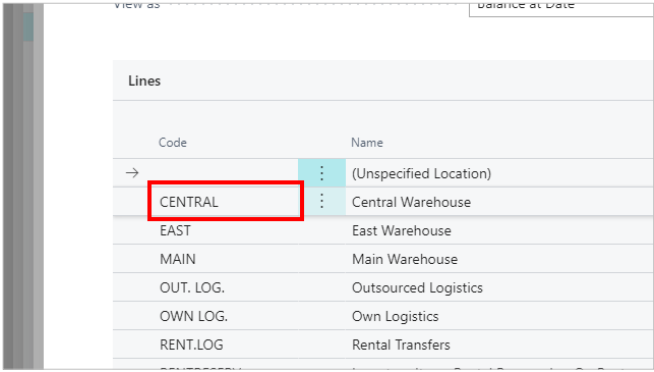
Click on the navigation menu item popup **Item Availability by**



Click on the navigation menu item **Location**



Click on the cell **Code** with the value **CENTRAL**



Click on the link in cell **Qty. on Hand** with the value **50**

Scheduled Receipt	Planned Receipt	Qty. on Hand	Projected Available
0	0	0	
0	0	50	
0	0		Open record "50"
0	0	0	
0	0	0	
0	0	0	
0	0	0	



Click on the back button

Dynamics 365 Business Central

← LOCATION - 1001 · WACKER HAMMER DRILL BITS 3/16 INCH | WORK DATE: 5/5/2020

1001 · Wacker Hammer Drill Bits 3/16 inch

◀ Previous Period ▶ Next Period | Navigate Fewer options

Options

View by Day

View as Balance at Date

Click on the back button

Dynamics 365 Business Central

← EM CARD - 1001 · WACKER HAMMER DRILL BITS 3/16 INCH | WORK DATE: 5/5/2020

1001 · Wacker Hammer Drill Bits 3/16 inch

Process Item History Special Sales...es & Discounts Request Approval

Item

No. 1001

Description Wacker Hammer Drill Bits 3/1

Blocked ☐

Click on the back button

s Central

← RENTAL CONT ← EDIT - RENTAL ← EDIT - RENTAL INVENTORY AVAILABILITY |

Back

OPTIONS

Location Filter

Rental Attributes | Navigate F

Item No. Item Description

→ 1001 : Wacker Hamme

Posting Date

Click on the cell **Rental Quantity** with the value **0**

Functions Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	
Wacker Hammer Drill Bits 3/16...	MONTH-PEND	0				
Fewer options						



Enter the text **2**.

Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1
Wacker Hammer Drill Bits 3/16...	MONTH-PEND	2			

Click on the cell **Location Code**

Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Wacker Hammer Drill Bits 3/16...	MONTH-PEND	2				

Click on the link in cell **Code** with the value **CENTRAL**

Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Drill Bits 3/16...	MONTH-PEND	2					5/5/2024

Code ↑

→ CENTRAL Central Warehouse

EAST Select record "CENTRAL" Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the cell **Bin Code** with the value **C-001**

The Bin Code specified as the Default Bin Code automatically populates the field on the rental line. The Bin Code can be overridden.

Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental End Date
Drill Bits 3/16...	MONTH-PEND	2	CENTRAL	C-001			5/5/2020	6/5/2020

When the Bin Code is overridden on the rental line, the Transfer-from Bin Code field on the Transfer Order is automatically updated.



ODT Rentals Online Help

Click on the link in cell **ODT Transfer Order No.** with the value **1006**

Options							
Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Return Location Code	Return Temporary Location Code	
2	0	0	0	1006			
Open record **							

Click on the cell **Transfer-from Bin Code** with the value **C-001**

Delete Line							
Description	Quantity	Transfer-from Bin Code	Transfer-To Bin Code	Reserved Quantity	Quantity Inbnd.		
Wacker Hammer Drill Bits 3/16 in...	2	C-001					
Look up value							

Click on the button **Close**

Partial

5/5/2020

Close

As the item quantity for the location and bin is on the Transfer Order the Rental Inventory Availability updated to display the item quantity now available for rent.

The Item Availability by Location will be updated as would be as if the Transfer Order has been manually created.

The following demonstrates the entry of an Item stored in bins to the Sales Lines.

NOTE

The Bin Code field is to be added to the Sales Lines using Personalize.

Click on the cell **Type** with the value **G/L Account Item Resource Fixed Asset Charge (Item)**

Sales Lines				
Manage Line Fewer options				
Type	No.	Description	Location Code	
→				
Shipping >				



ODT Rentals Online Help

Click on the link in cell **Code** with the value **SOUTH**

Wacker Hammer Drill Bits 3/16...		MONTH-PEND	2		
		Code ↑	Name		
		→ CENTRAL	Central Warehouse		
		EAST	East Warehouse		
		MAIN	Main Warehouse		
		RENTRESERV	Inventory Items Rental Rese		
		SOUTH	South Warehouse		
		+ New	New Location		
Line	Fewer options				
Description					
Wacker Hammer Drill Bits 3-Fla...		▼	0	PCS	

Click on the cell **Bin Code** with the value **S-001**

Wacker Hammer Drill Bits 3-Fla...		SOUTH	S-001	0	PCS	
			Look up value			

Click on the cell **Quantity** with the value **0**

Wacker Hammer Drill Bits 3-Fla...		SOUTH	S-001	0	PCS	27.00
-----------------------------------	--	-------	-------	---	-----	-------

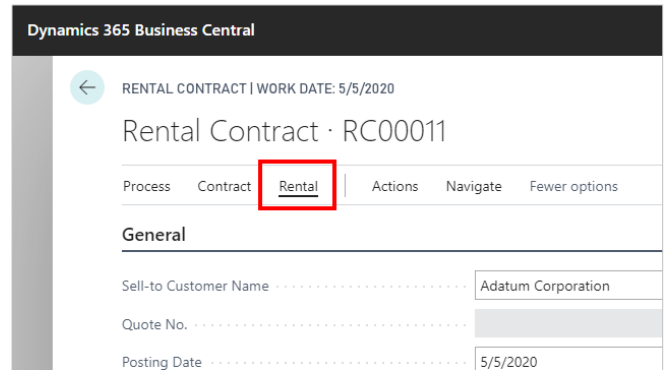
Enter the text **1**.

Wacker Hammer Drill Bits 3-Fla...		SOUTH	S-001	1	PCS	27.00
-----------------------------------	--	-------	-------	---	-----	-------

The following demonstrates the shipping of the rental units on the contract.

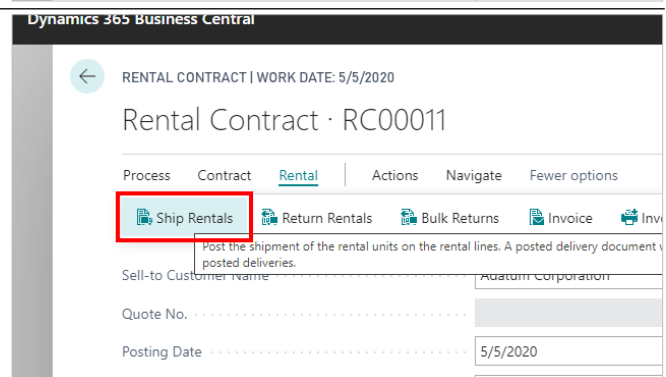
ODT Rentals Online Help

Click on the navigation menu item popup **Rental**



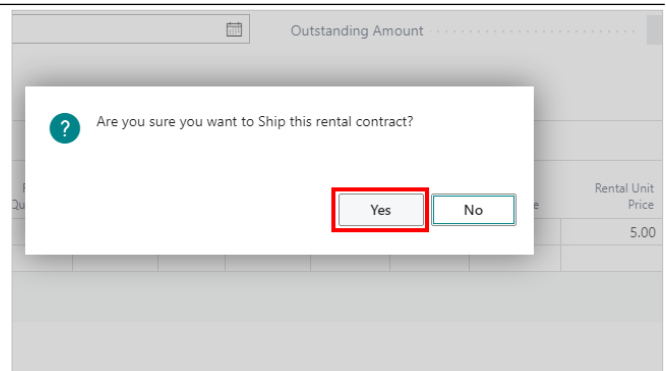
The screenshot shows the 'Dynamics 365 Business Central' interface for a 'Rental Contract · RC00011'. The 'Rental' tab in the navigation menu is highlighted with a red box. Below the navigation bar, the 'General' section is visible, showing fields for 'Sell-to Customer Name' (Adatum Corporation), 'Quote No.', and 'Posting Date' (5/5/2020).

Click on the navigation menu item **Ship Rentals**



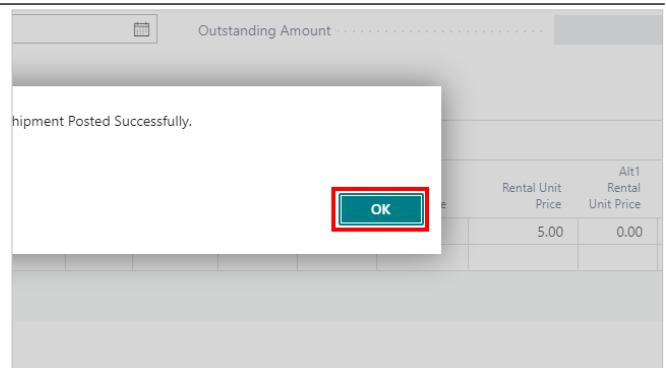
The screenshot shows the 'Dynamics 365 Business Central' interface for a 'Rental Contract · RC00011'. The 'Ship Rentals' button in the 'Rental' tab is highlighted with a red box. A tooltip is visible over the button, stating: 'Post the shipment of the rental units on the rental lines. A posted delivery document is created for the posted deliveries.'

Click on the button **Yes**



The screenshot shows a confirmation dialog box with the question: 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. The background shows the 'Outstanding Amount' field and a table with columns for 'Rental Unit Price' and 'Alt1 Rental Unit Price'.

Click on the button **OK**



The screenshot shows a success message dialog box with the text: 'Shipment Posted Successfully.'. The 'OK' button is highlighted with a red box. The background shows the 'Outstanding Amount' field and a table with columns for 'Rental Unit Price' and 'Alt1 Rental Unit Price'.

The following demonstrates the review of the Rental Inventory Availability, Item Availability by Location and the Item Warehouse, Bin Contents for the Item linked to the Rental Unit shipped.



Click on the navigation menu item popup **Manage**

Click on the navigation menu item **Rental Inventory Avail.**

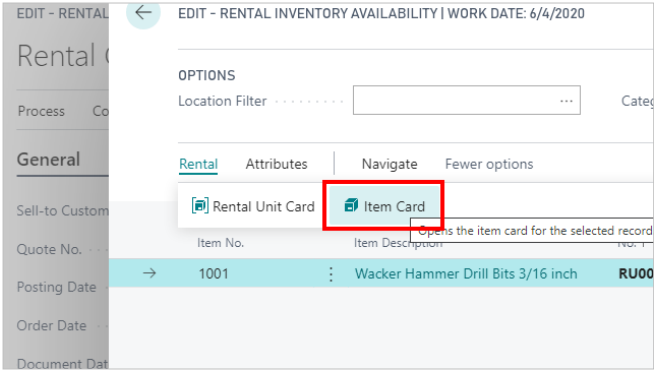
Click on the cell **Rental Avail. Inventory** with the value **48**

Note that the quantity in the Rental Avail. Inventory field for the item has been reduced by 2 by the shipment of the unit.

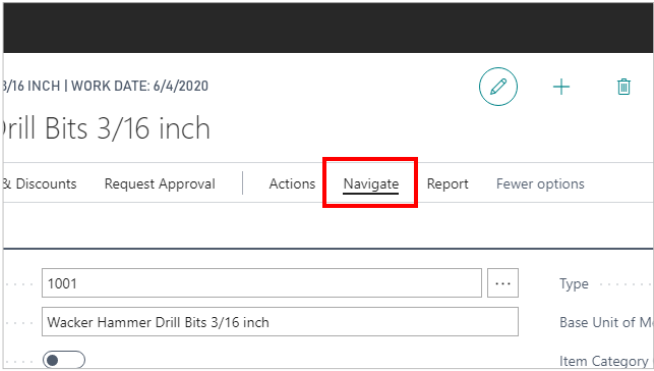
Click on the navigation menu item popup **Rental**



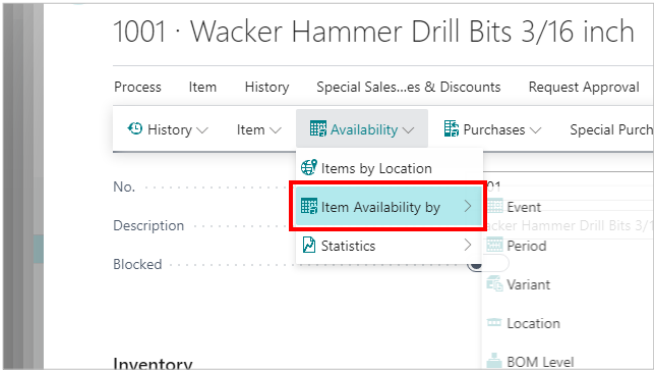
Click on the navigation menu item **Item Card**



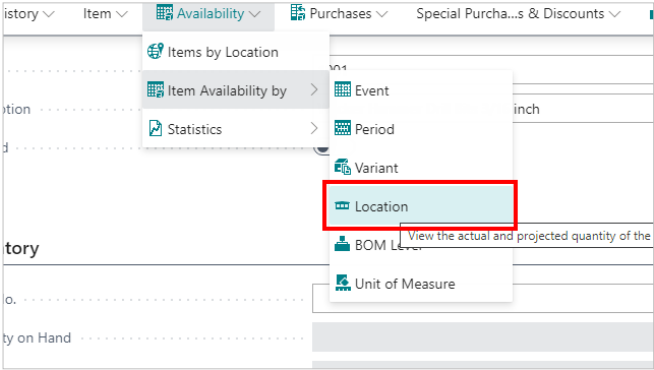
Click on the navigation menu item popup **Navigate**



Click on the navigation menu item popup **Item Availability by**



Click on the navigation menu item **Location**





ODT Rentals Online Help


Click on the cell **Qty. on Hand** with the value **48**

Note that the Qty. on Hand in the Central location for the item has been reduced by the shipment of the unit.

Scheduled Receipt	Planned Receipt	Qty. on Hand	Projected Available
0	0	0	
0	0	48	
0	0	0	
0	0	0	
0	0	0	
0	0	0	
0	0	0	

Click on the back button

Dynamics 365 Business Central



LOCATION - 1001 - WACKER HAMMER DRILL BITS 3/16 INCH | WORK DATE: 6/4/2020

1001 · Wacker Hammer Drill Bits 3/16 inch

Previous Period

Next Period

Navigate

Fewer options

Options

View by




Day

View as

Balance at Date

Click on the navigation menu item popup **Navigate**

3/16 INCH | WORK DATE: 6/4/2020



drill Bits 3/16 inch

& Discounts

Request Approval

Actions

Navigate

Report

Fewer options

1001




Type

Wacker Hammer Drill Bits 3/16 inch

Base Unit of M

Item Category

Click on the navigation menu item popup **Warehouse**



ons

Navigate

Report

Fewer options

ounts

Sales

Bill of Materials

Warehouse

Resources

Type

Inve

Base Unit of Measure

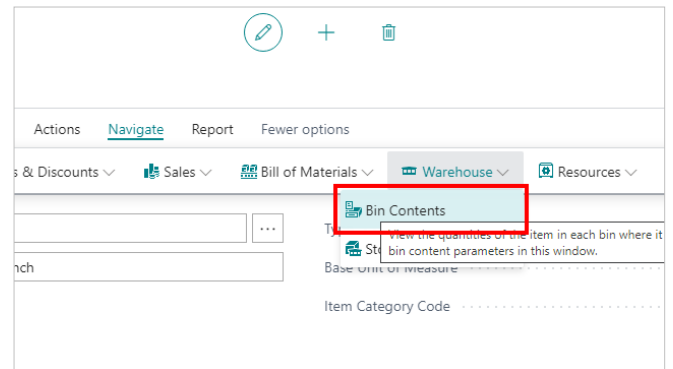
PCS

Item Category Code

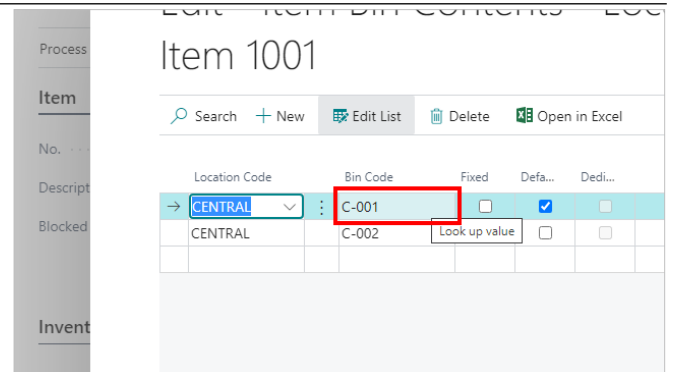
MISC



Click on the navigation menu item **Bin Contents**

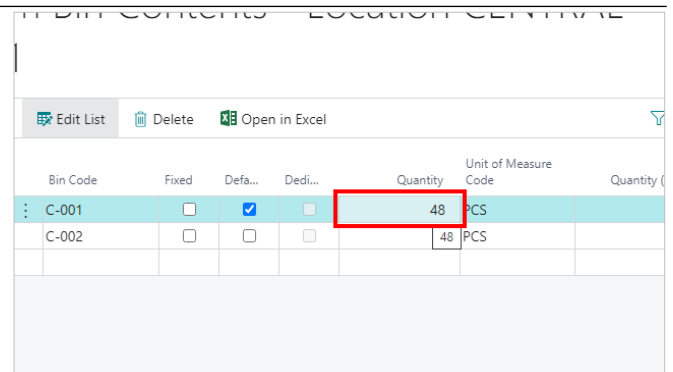


Click on the cell **Bin Code** with the value **C-001**

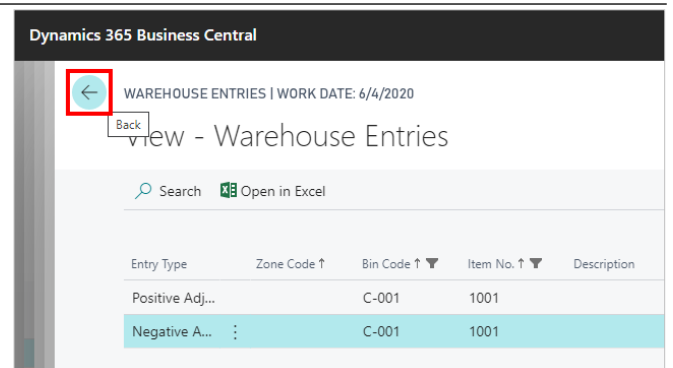


Click on the cell **Quantity** with the value **48**

Note that the quantity in the bin for the item has been reduced by the shipment of the unit.

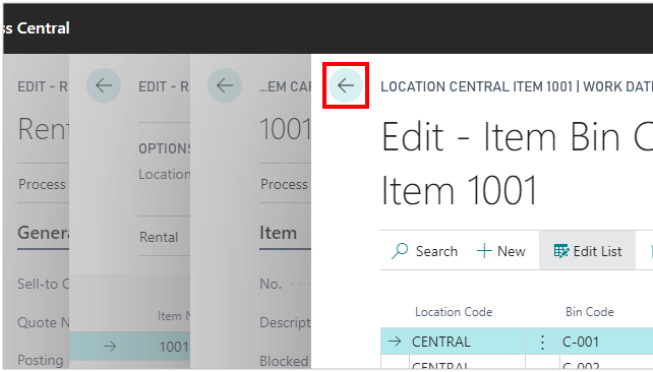


Click on the back button

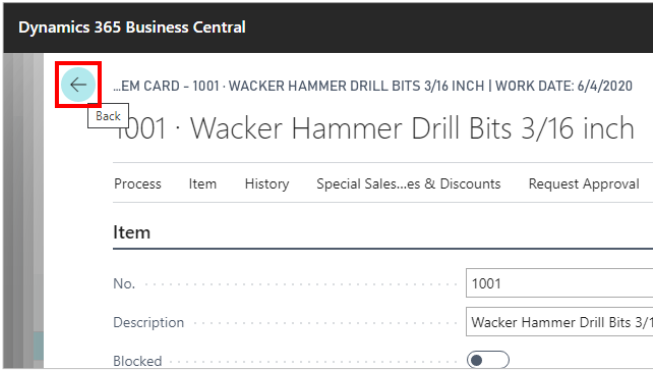




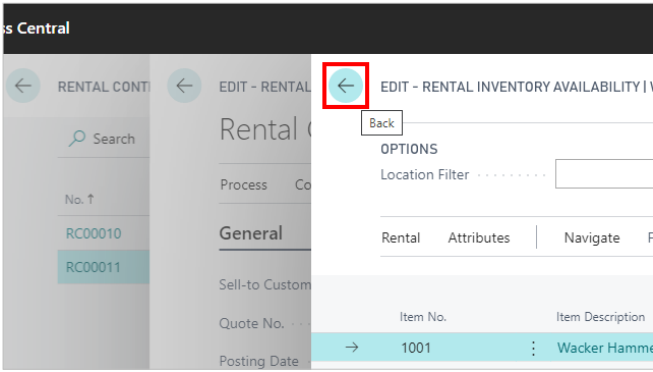
Click on the back button



Click on the back button

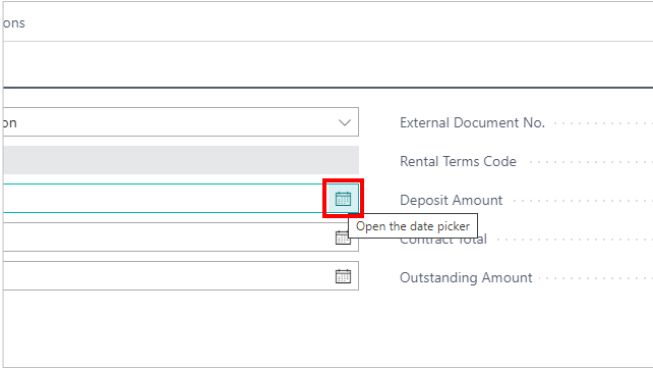


Click on the back button



The following demonstrates the invoicing of the contract which will invoice the rental and ship and invoice the sales line containing an item stored in a bin.

Click on the link **Open the date picker**





Click on the link **Next**

Adatum Corporation

5/5/2020

May 2020

Su Mo Tu We Th Fr Sa

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Functions

Click on a date in the calendar

Adatum Corporation

5/5/2020

June 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Go to today Done

Page Line Functions

Standard Text Code Description Rental Terms Code Rental Quantity Location Code Bin Code

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC00011

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/4/2020

Click on the navigation menu item **Invoice**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/5/2020

Rental Contract · RC00011

Contract **Rental** Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Finalize the document by posting the amounts and

Customer Name Adatum Corporation

Posting Date 6/4/2020



Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

Click on the button **OK**

Invoice Posted Successfully.

OK

The following demonstrates the return of the Rental Unit.

Click on the field **Posting Date**

Adatum Corporation

6/4/2020

5/5/2020

6/4/2020

Click on the cell **Qty. to Return** with the value **0**

Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Return Location Co
	SUPPLIES	0	2	0	0	1008	



Enter the text **2**.

Functions Fewer options							
Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Return Location Code
	SUPPLIES	0	2		0	1008	

Click on the cell **Return Bin Code** with the value **C-001**

Return Location Code	Return Temporary Location	Return Bin Code	Line Discount %	Ret... Day Bills...	Partial Return Date	Dep Cod
		C-001	0	<input checked="" type="checkbox"/>		

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00011 | WORK DATE: 6/4/2020

Rental Contract · RC00011

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/4/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00011 | WORK DATE: 6/4/2020

Rental Contract · RC00011

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

Post the return of the rental units on the rental lines. A posted re returns.

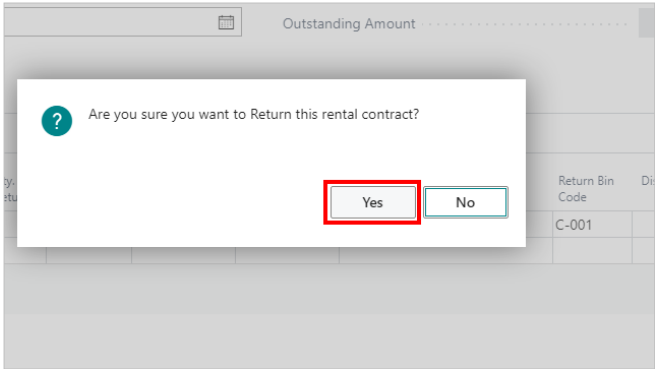
Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/4/2020

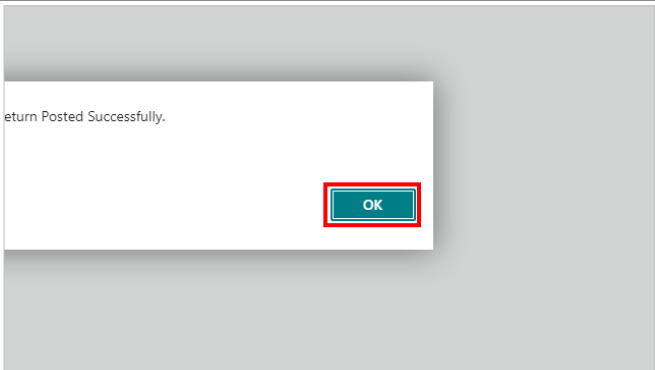


Click on the button **Yes**



Click on the button **OK**

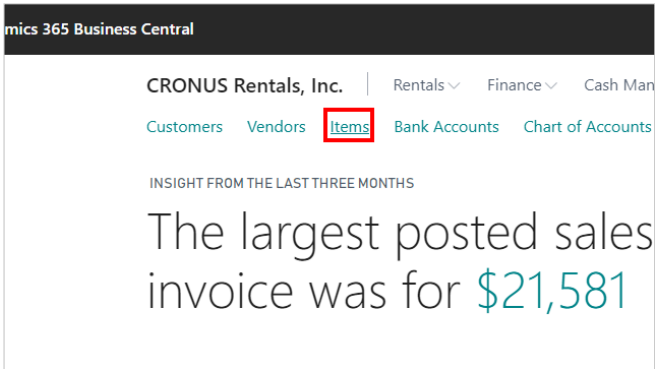
Upon selecting OK, the contract will close as it has been fully invoiced.



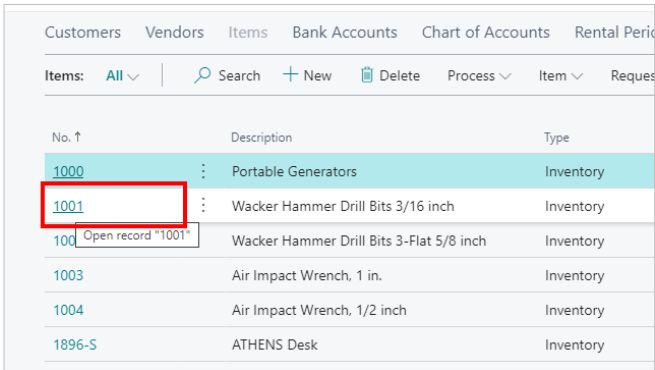
The following demonstrates the reviewing of the Item Availability by Location and the Warehouse Bin Contents for the Item linked to the Rental Unit returned.

You will note that the quantity displayed on both is now displaying 50.

Click on the navigation menu item **Items**

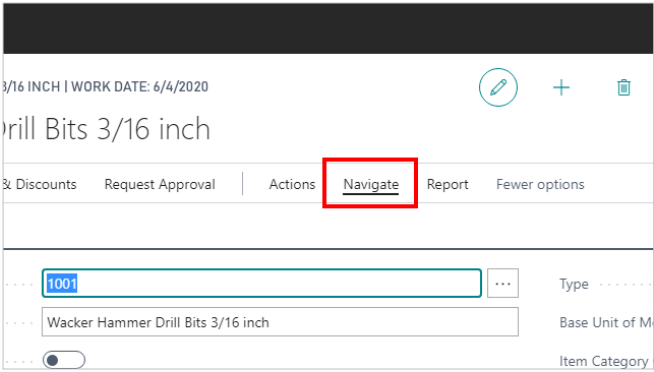


Click on the link in cell **No.** with the value **1001**

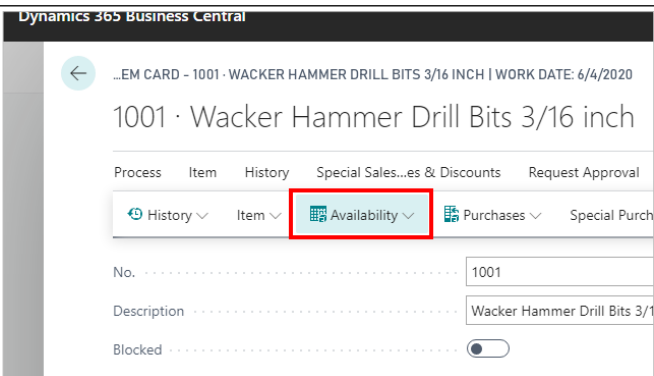




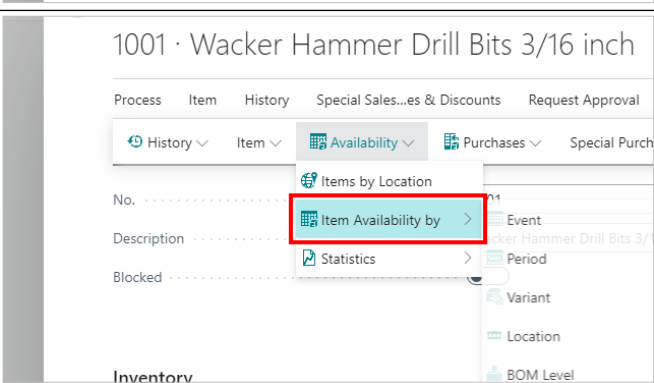
Click on the navigation menu item popup **Navigate**



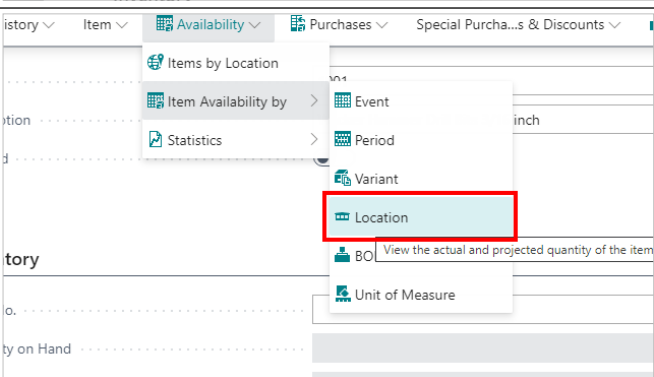
Click on the navigation menu item popup **Availability**



Click on the navigation menu item popup **Item Availability by**



Click on the navigation menu item **Location**






ODT Rentals Online Help

Click on the cell **Qty. on Hand** with the value **50**

Scheduled Receipt	Planned Receipt	Qty. on Hand	Projected Available
0	0	0	
0	0	50	
0	0	0	
0	0	0	
0	0	0	
0	0	0	
0	0	0	

Click on the back button

Dynamics 365 Business Central

 LOCATION - 1001 - WACKER HAMMER DRILL BITS 3/16 INCH | WORK DATE: 6/4/2020

Back1001 · Wacker Hammer Drill Bits 3/16 inch

◀ Previous Period

▶ Next Period

Navigate

Fewer options

Options

View byDay

View asBalance at Date

Click on the navigation menu item popup **Navigate**

3/16 INCH | WORK DATE: 6/4/2020

drill Bits 3/16 inch

& Discounts

Request Approval

Actions

Navigate

Report

Fewer options

1001

Type

Wacker Hammer Drill Bits 3/16 inch

Base Unit of M

Item Category

Click on the link **Warehouse**

+

ons

Navigate

Report

Fewer options

ounts

Sales

Bill of Materials

Warehouse

Resources

Type

Inve

Base Unit of Measure

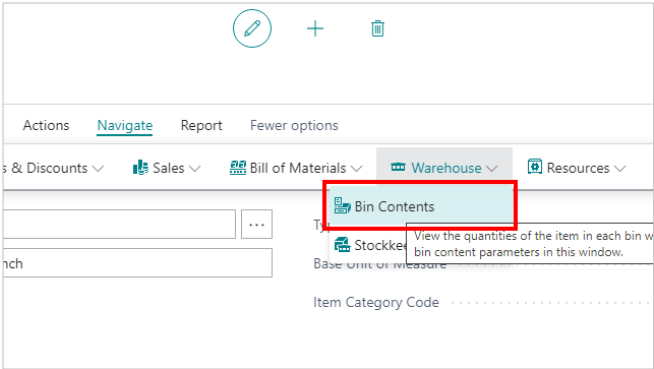
PCS

Item Category Code

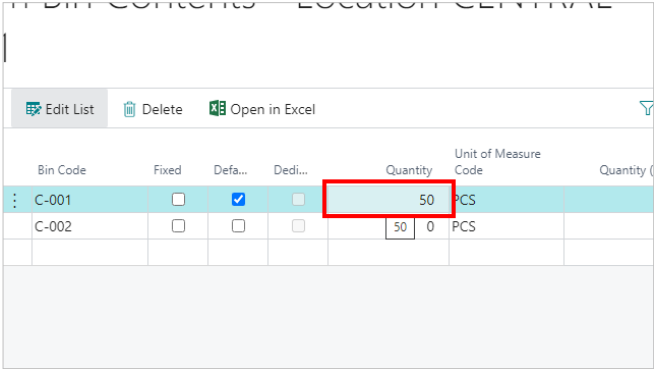
MISC



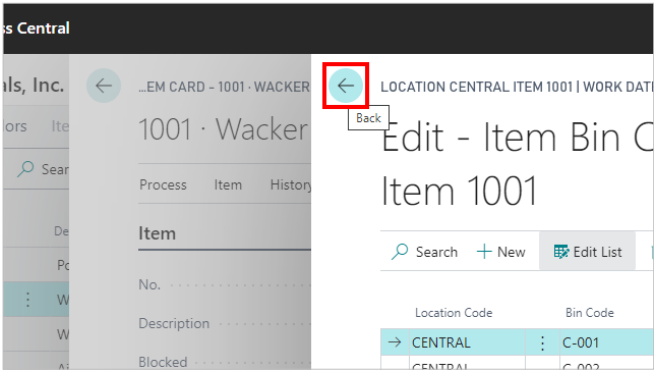
Click on the navigation menu item **Bin Contents**



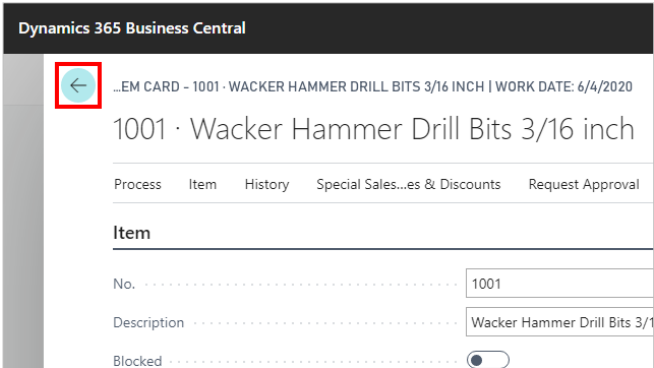
Click on the cell **Quantity** with the value **50**



Click on the back button



Click on the back button



3.9. Rentals with Adv. Sales Line Shipping

3.9.1. Advanced Sales Line Processing Overview

3.9.1.1. Processing Overview

When an organization which has ODT Rentals decides to commence using the Advanced Sales Line Shipping, the Sales Orders will only be created on new Rental Contract.

The current open Rental Contracts with Sales Lines will not have a Sales Order created and will continue to be

shipped and invoiced when an invoice is posted on the contract.

When the Sales Order is created the information defaults from the Rental Contract to the Sales Order.

The linked Sales Order has been restricted so that the order header and lines cannot be directly modified, Item tracking lines cannot be accessed, nor can the Sales Order shipping be posted directly from the order.

Any changes to the Sale Lines fields and Item Tracking lines on the contract will update the linked Sales Order Lines.

When the Posting Date is changed on the contract, then the Posting Date is updated on the Sales Order. If the Ship-to is changed on the contract prior to shipping either Rental or Sales Lines, then the Sales Order Ship-to will be updated.

Should Undo Shipment have been run on the Posted Sales Shipment, and the Rental Contract Sales Line(s) are to be deleted, then the Sales Order must be reopened prior to deleting the contract Sales Line(s).

3.9.1.2. Warehouse Shipments Information

On the linked Sale Order, a Warehouse Shipment can be created and, when posting the Warehouse Shipment, the option of Ship is to be used.

The Ship and Invoice option will generate a message advising that ship and invoice is not allowed.

Example of the message: Sales Header S-ORD101013 is linked to Rental Contract RC00006. Can not perform warehouse ship and invoice for this type of document. Choose warehouse shipment only.

The posting of the Warehouse Shipment updates the Sales Order linked to the contract Sales lines, which in turn updates the contract Sales lines.

NOTE:

For organizations that are using the Rental Dispatch, Advanced Sales Line Shipping, and are going to use Warehouse Shipments, then the Warehouse Shipments must be created, and the shipments posted prior to releasing any lines on the contract for delivery.

The posting of the Warehouse Shipment is not allowed when the Dispatch Status on the contract has Awaiting Dispatch.

3.9.2. Advanced Sales Line Shipping Overview

3.9.2.1. Overview

The Advanced Sales Line Shipping with Sales Orders provides organizations with the option to ship sales lines separately from invoicing, including partial shipments, warehouse shipments, partial invoicing of shipped sales lines, and the ability to undo shipments.

A setup option field, Advanced Sales Line Shipping, has been added to Rental Management Setup where organizations can choose whether to use the Advanced Sales Lines Shipping feature or to continue using the process where the sales lines are shipped and invoiced when an invoice is posted on a Rental Contract.

When the Advanced Sales Line Shipping is enabled, then the feature includes:

- The creation of a Sales Order when Sales Lines are added to a Rental Contract when the contract is created from a Rental Quote or entered directly on the contract which is linked to the Rental Contract that remains open as long as the contract is open.
- The benefit to using the Advanced Sales Line Shipping is that when entering inventory items on the sales lines and the Sales Order is created the item availability will include the availability requirement from the Rental Contract Sales Lines.

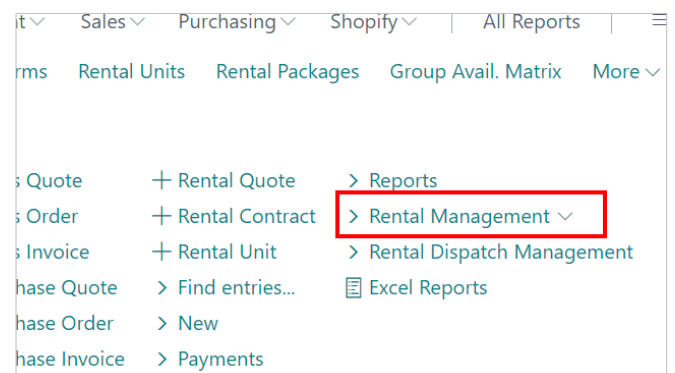
- The linked Sales Order is updated when changes are made on the Rental Contract .
- The Ship Rentals menu option ships the sales lines based on the Qty to Ship on the Sales Lines and synchronized Sales Order.
- The ability to post Warehouse Shipments on the linked Sales Order for Locations that have Require Shipment enabled on the Warehouse tab which updates the Sales Order and the Rental Contract.
- Invoices Sales product based on the Qty. to Invoice on the Sales Lines and Sales Order.
- The ability to Undo Shipments for sales lines from the Posted Sales Shipment which undoes the shipment on the Sales Order and updates the Qty. to Ship on the Sales Lines on the contract and the Lines on the linked Sales Order.

When the field is disabled, then a Sales Order will not be created for the Sales Lines, and the Sales Lines will continue to be shipped and invoiced when the Rental Contract is invoiced.

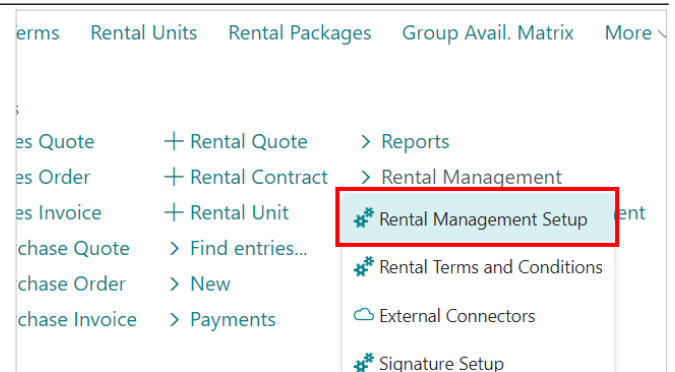
3.9.2.2. How to Activate Advanced Sales Line Shipping

The following demonstrates how to activate the Advanced Sales Line Shipping on Rental Management Setup.

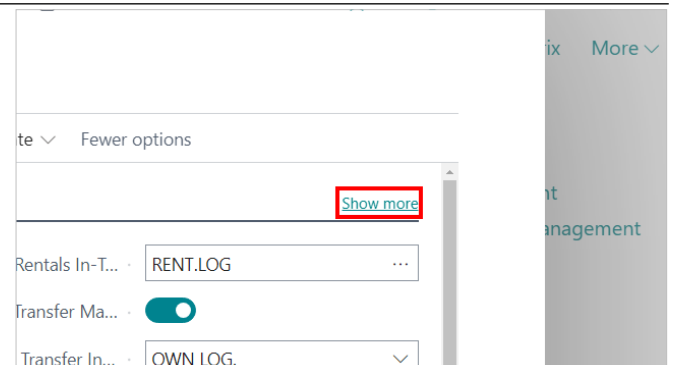
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**

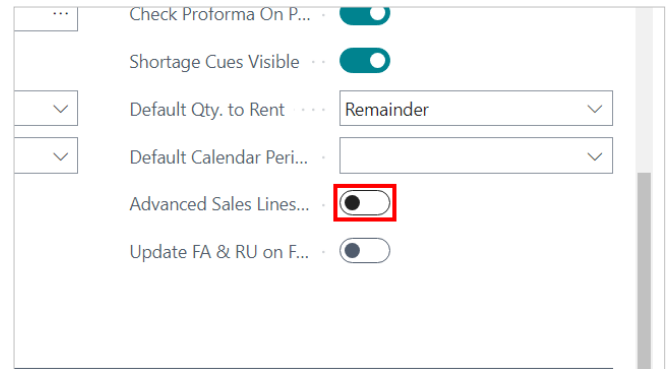


Click on the button **General, Show more**



Click on the toggle field Advanced Sales Lines Shipping

By default, the Advanced Sales Line Shipping is disabled. By clicking on the toggle field, the Advanced Sales Line Shipping is activated. Any new Rental Contracts created with Sales Lines will automatically have a Sales Order created and linked to the contract.



The screenshot shows a settings panel with several toggle fields. The 'Advanced Sales Lines...' toggle is highlighted with a red box and is currently turned off. Other visible toggles include 'Check Proforma On P...', 'Shortage Cues Visible', and 'Update FA & RU on F...'. Dropdown menus for 'Default Qty. to Rent' (set to 'Remainder') and 'Default Calendar Peri...' are also visible.

3.9.3. How to Process Rental Sales Lines with Advanced Sales Line Shipping

3.9.3.1. Overview

The following examples will demonstrate the shipping of the Sales Lines when selecting Ship Rentals.

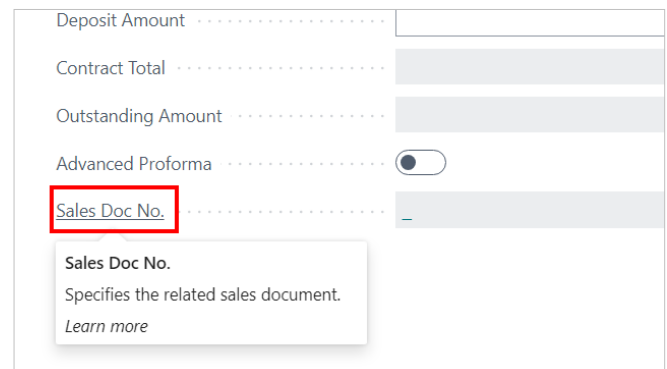
- Shipping the full sales line quantity
- Undo Shipment of a shipped sales line
- Shipping a partial quantity

3.9.3.2. How to Ship the Full Sales Line Quantity

The following will demonstrate the shipping of the full sales line quantity when shipping the rental lines which had been entered prior to entering the Sale Line.

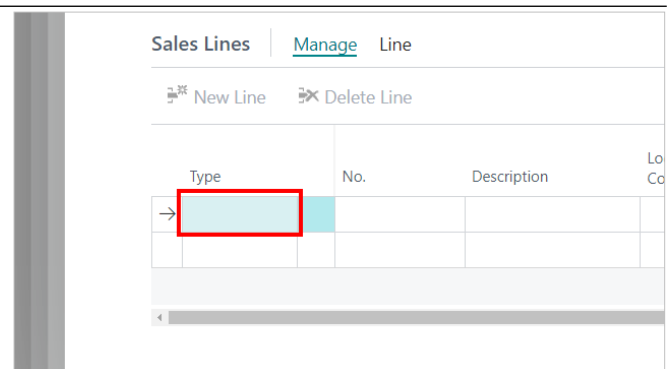
Click on the link **Sales Doc No.**

Note that the Sales Doc. No. field is blank.



The screenshot shows a form with several fields: 'Deposit Amount', 'Contract Total', 'Outstanding Amount', 'Advanced Proforma' (with a toggle), and 'Sales Doc No.'. The 'Sales Doc No.' field is highlighted with a red box. A tooltip is visible over the field, stating 'Sales Doc No. Specifies the related sales document. Learn more'.

Click on the cell **Type**



The screenshot shows a table titled 'Sales Lines' with a 'Manage' link and 'New Line' and 'Delete Line' buttons. The table has columns: 'Type', 'No.', 'Description', and 'Lo Co'. The 'Type' column is highlighted with a red box, and a red arrow points to the first cell in this column.



Click on the item **Item** in the list

Manage Line

New Line Delete Line

Type	No.	Description	Lo Co
→			

Shipping

Click on the cell **No.**

Manage Line

New Line Delete Line

Type	No.	Description	Lo Co
→ Item			

Click on the link in cell **No.** with the value **1005**

Manage Line

New Line Delete Line

No.	Description
1003	Air Impact Wrench, 1 in.
1004	Air Impact Wrench, 1/2 in.
1005	Generator Lubricant
1006	Series 10 Sucker Rod Over
1007	Basket Grapple
+ New	

Shipping

Ship-to

Shipment Date

script; Show On Map

Click on the cell **Location Code**

Manage Line

Delete Line


No.	Description	Location Code	Bin Code	Quantity	Unit of Meas Code
1005	Generator Lubricant			0	PCS

ODT Rentals Online Help

Click on the link in cell **Code** with the value **EAST**

[illegible]

Click on the cell **Quantity** with the value **0**

Description	Location Code	Bin Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Code
Generator Lubricant	EAST 		0	PCS	15.00	SUP

Enter the text **4**.

Description	Location Code	Bin Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Code
Generator Lubricant	EAST		4	PCS	15.00	SUP

Click on the field **Sales Doc No.**

The linked Sales Order will open when clicking on the Sales Doc. No.

.....		0.00
.....		
.....		18,931.20
.....		
.....		18,931.20
.....	<input type="checkbox"/>	
.....	S-ORD101010	
.....		



Sales Order Linked to Sales Lines

Type	No.	Item Referen... No.	Description	Location Code	Bin Code	Quantity	Qty. to Assemble to Order
Item	1005		Generator Lubricant	EAST		4	

On the General Tab note that the field Rental Linked Sales Order is enabled. This indicates that the order is linked to Sales Lines on a Rental Contract and that the Sales Order cannot be posted from the Sales Order document.

Note that the line on the sales order contains the information from the contract Sales Line.
Close the Sales Order.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Ship Rentals**

Click on the button **Yes**



Click on the button **OK**

Contract Total

Posted Successfully.

OK

S-ORD101010

ail Matrix Rental Inventory Avail. Availability Calendar

Click on **Type = 2, No. = 1005, Description = Generator Lubricant**

Sales Lines | [Manage](#) Line

[New Line](#) [Delete Line](#)

Type	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax
→ Item	SUPPLIES	60.00	61.20

Click on the cell **Quantity Shipped** with the value **4**

Shipment Date	Required Shipping Date	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. Assigned
4/8/2024	4/8/2024	0	4	4	0	

Click on the field **Sales Doc No.**

..... 0.00

..... 18,931.20

..... 18,931.20

..... ☐

S-ORD101010

.....

.....



Click on the link in cell **Quantity Shipped** with the value **4**

der					
Select items...					
ount	Amount				
. Tax	Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Qu
60.00	61.20		4	4	
Open details for "Quantity Shipped"					

Click on the link in cell **Document No.** with the value **S-SHPT102215**

Rental Contract ·		Posted Sales Shipment Lines	
Home Contract Rental Job		Search Show Document	
General			
Sell-to Customer Name		Document No. ↑	Sell-to Customer No. No
Quote No.		S-SHPT102215	10000 10
Posting Date			
Order Date			

Click on the navigation menu item **Show Document**

The Posted Sales Shipment document will be displayed.

s Central	
Contract	
Rental Contract ·	
Contract Rental Job	
Posted Sales Shipment Lines	
Search Show Document Dimensions	
Document No. ↑	
S-SHPT102215	
Sell-to Customer No. No. ↑	
10000 1005	

3.9.3.3. How to Undo Shipment of a Shipped Sales Line

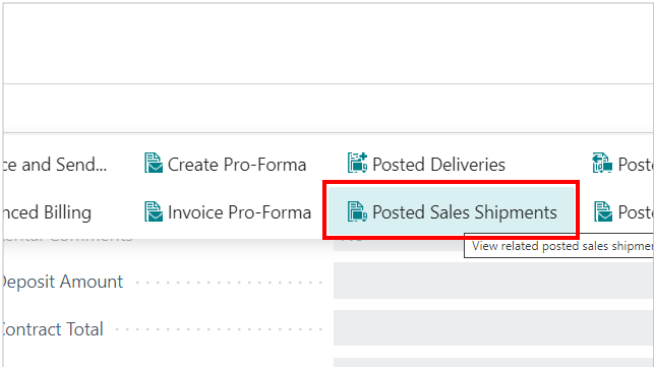
The following demonstrates how to undo the shipment of a shipped Sales Line. This example uses the Rental Contract where the full quantity of the Sales Line was shipped when Ship Rentals was run.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central	
Rental Contract	
Rental Contract · RC00001	
Home Contract Rental Job More options	
General	
Sell-to Customer Name Adatum Corporation	

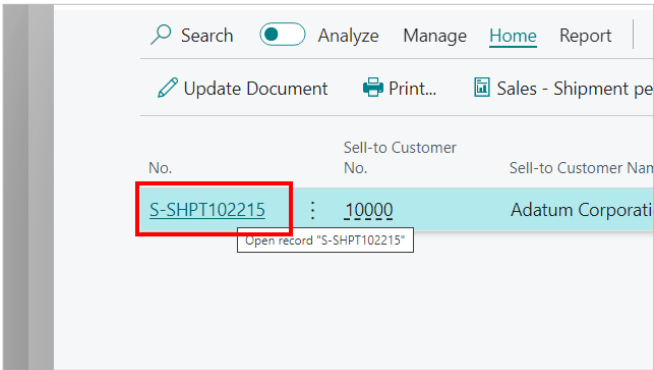


Click on the navigation menu item **Posted Sales Shipments**



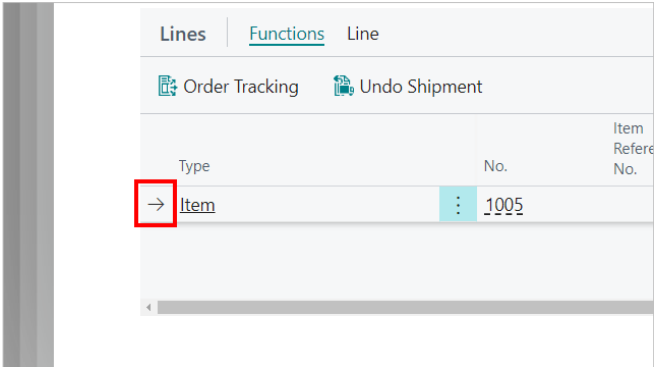
If there are multiple Posted Sales Shipment documents in the list, then select the document that contains the sales product that was shipped and needs to have the shipment undone.

Click on the link in cell **No.** with the value **S-SHPT102215**

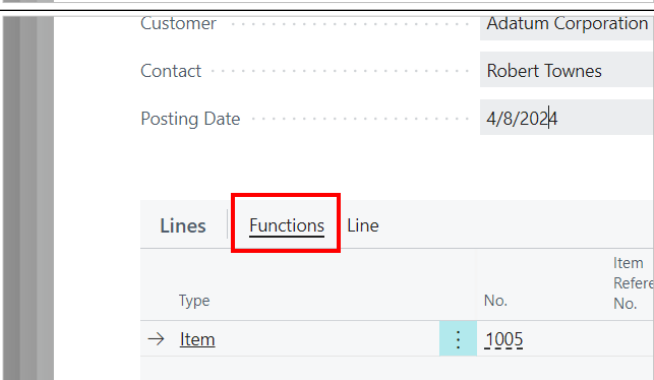


If there are multiple lines on the Posted Sales Shipment document, then select the line that contains the product that the shipment is to be undone on.

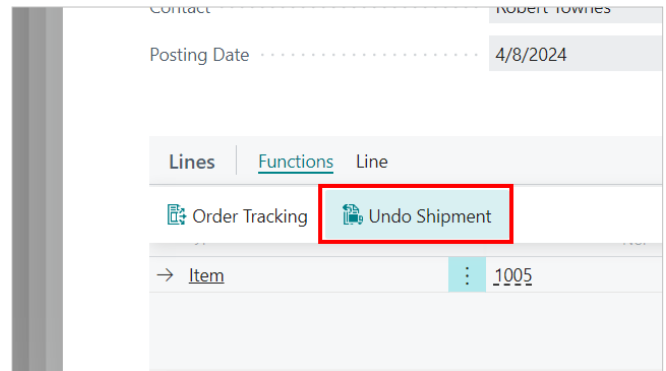
Click on **Type = Item, No. = 1005, Description = Generator Lubricant**



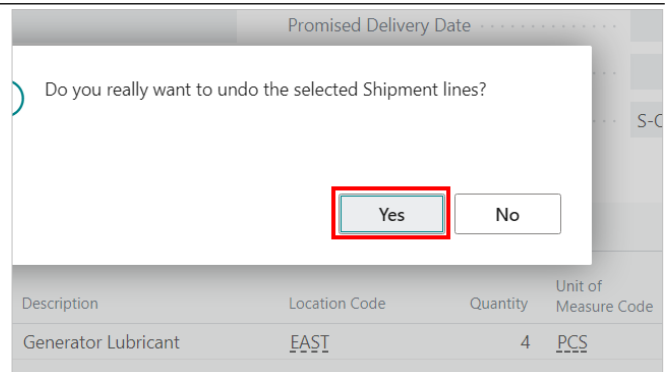
Click on the navigation menu item popup **Functions**



Click on the navigation menu item **Undo Shipment**



Click on the button **Yes**

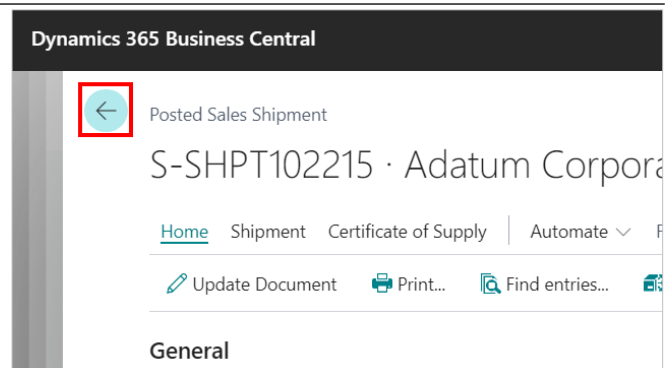


Click on the cell **Quantity** with the value **-4**

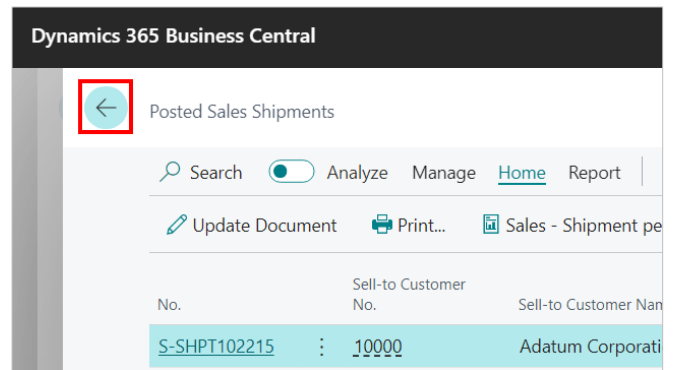
Note that the Posted Sales Shipment has a second line now with the quantity being a negative quantity.

	Location Code	Quantity	Unit of Measure Code
or Lubricant	EAST	4	PCS
or Lubricant	EAST	-4	PCS

Click on the back button



Click on the back button



Dynamics 365 Business Central

Posted Sales Shipments

Search Analyze Manage Home Report

Update Document Print... Sales - Shipment pe

No. Sell-to Customer No. Sell-to Customer Name

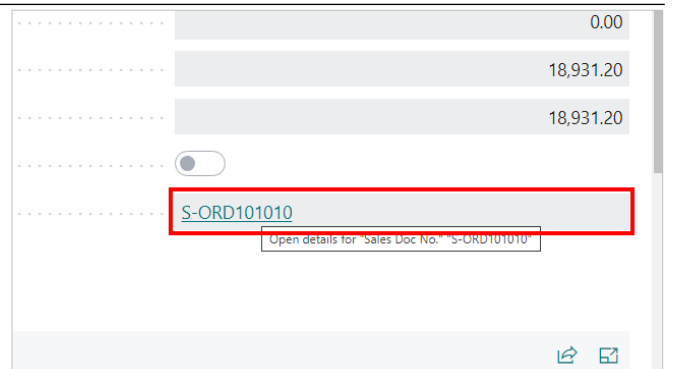
S-SHPT102215 : 10000 Adatum Corporati

Click on the cell **Qty. to Ship** with the value **4**

Note that the Qty. to Ship on the Rental Contract Sales line now populated again with the initial Qty. to Ship as was prior to shipping.

	Curr...	Shipment	Required	Qty. to	Quantity	Qty. to	Quantity
%	Code	Date	Shipping	Ship	Shipped	Invoice	Invoiced
0		4/8/2024	4/8/2024	4	0	4	

Click on the field **Sales Doc No.**



0.00

18,931.20

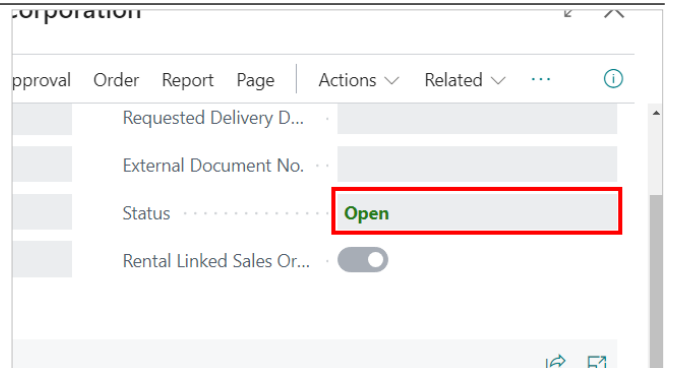
18,931.20

S-ORD101010

Open details for Sales Doc No. S-ORD101010

Click on the field **Status**

Note that the Status of the linked Sales Order now contains Open due to the undo shipment being processed.



Approval Order Report Page Actions Related

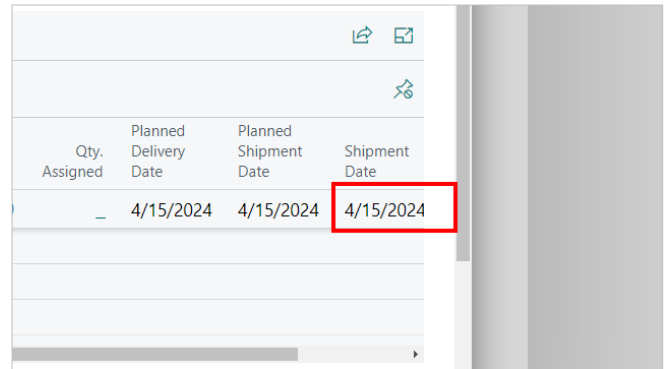
Requested Delivery D...

External Document No.

Status Open

Rental Linked Sales Or...

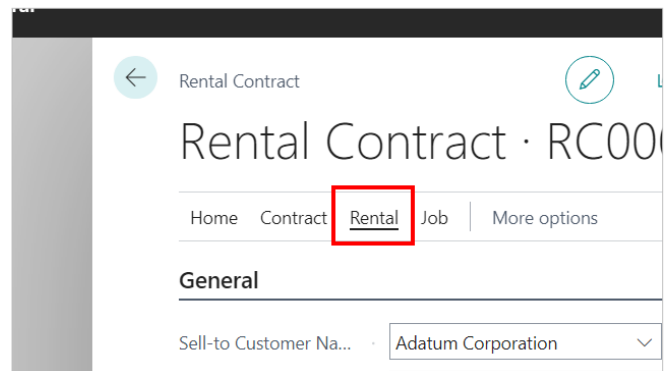
Click on the cell **Shipment Date** with the value
4/15/2024



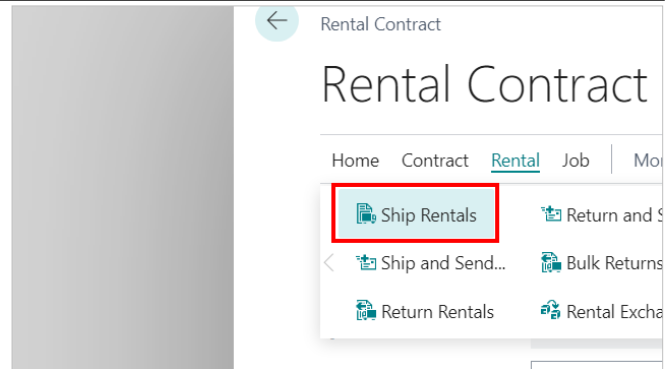
Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date
1	4/15/2024	4/15/2024	4/15/2024

Close the linked Sales Order.
And select Ship Rentals on the Rental Contract to process the partial shipment of the sales line.

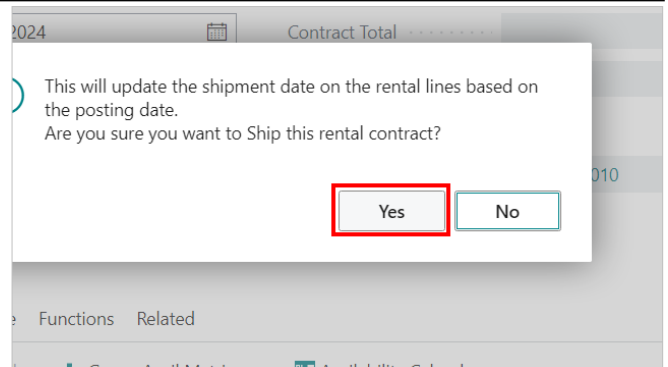
Click on the navigation menu item popup **Rental**



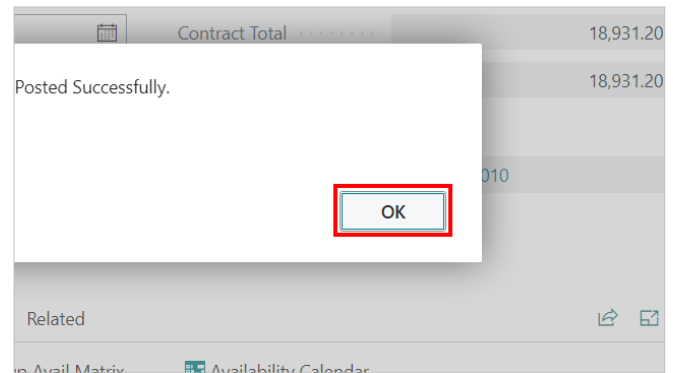
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



Contract Total 18,931.20

Posted Successfully.

OK

Related

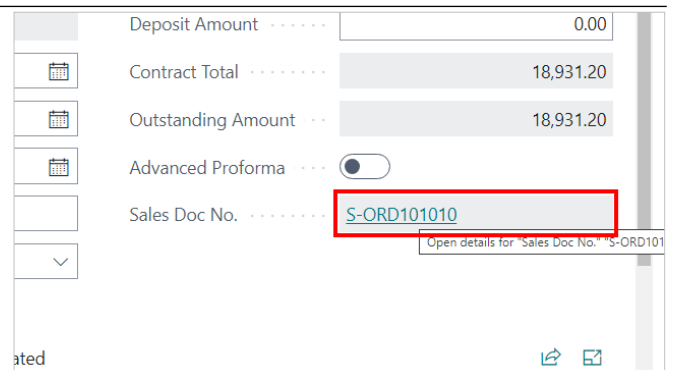
Availability Calendar

Click on the cell **Quantity Shipped** with the value **2**

Note that the Qty. to Ship and Quantity Shipped fields have been updated to reflect the partial shipment of the sales line product.

Shipment Date	Required Shipping Date	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. Assigned
4/15/2024	4/15/2024	2	2	4	0	

Click on the field **Sales Doc No.**



Deposit Amount 0.00

Contract Total 18,931.20

Outstanding Amount 18,931.20

Advanced Proforma ☐

Sales Doc No. S-ORD101010

Open details for "Sales Doc No." S-ORD101

Click on the link in cell **Quantity Shipped** with the value **2**

Note that the Qty. to Ship and Quantity Shipped fields have been updated on the Sales Order line to reflect the partial shipment of the Rental Contract Sales Line.

Type	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. Assigned
Item	2	2	4	-	

To ship the remaining quantity on the sales line at a later date:

- Change the Shipment Date on the Sales Line to the date being shipped, which updates the linked Sales Order line.
- Change the Posting Date on the Rental Contract General tab, which updates the linked Sales Order Posting Date.
- Select Ship Rentals.

3.9.4. How to Process Advanced Sales Lines Warehouse

Shipments

3.9.4.1. Overview

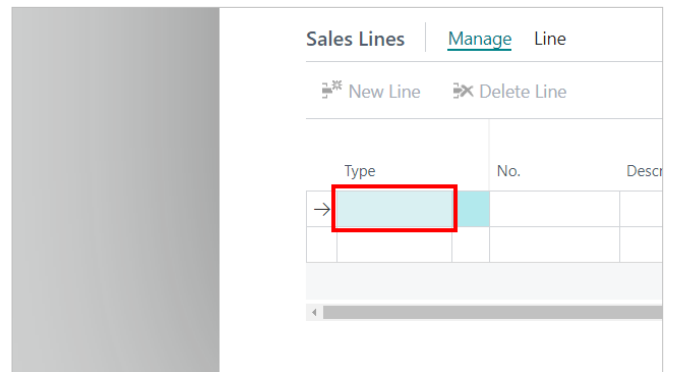
The following example demonstrates the creation and posting of a Warehouse Shipment for an item located in Bins in a Location that requires Warehouse Shipments and Receipts.

NOTE: On the Warehouse Shipment document only the shipment can be posted. An error will occur if Ship and Invoice is selected.

3.9.4.2. How to Process Advanced Sales Lines Warehouse

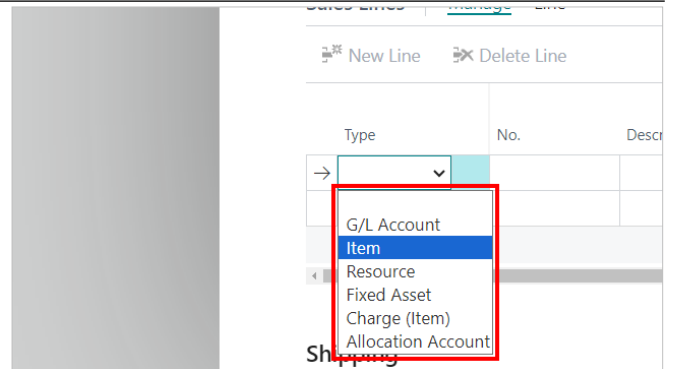
Shipments

Click on the cell **Type**



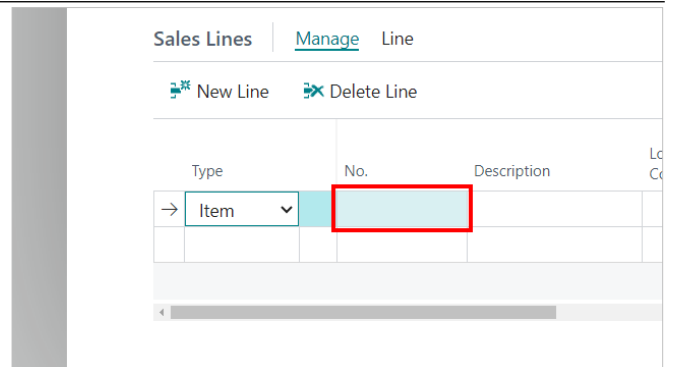
The screenshot shows the 'Sales Lines' window with the 'Manage' tab selected. The 'Type' dropdown menu is highlighted with a red box, and the 'No.' field is also highlighted. The 'Description' field is visible to the right.

Click on the item **Item** in the list



The screenshot shows the 'Sales Lines' window with the 'Manage' tab selected. The 'Item' dropdown menu is highlighted with a red box, and the 'No.' field is also highlighted. The 'Description' field is visible to the right.

Click on the cell **No.**



The screenshot shows the 'Sales Lines' window with the 'Manage' tab selected. The 'No.' field is highlighted with a red box. The 'Type' dropdown menu is set to 'Item', and the 'Description' field is visible to the right.



Click on the cell **Quantity** with the value **0**

Description	Location Code	Bin Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Code
Whse Shipments - 1	EAST - SE	SE-001	0	PCS	0.00	*

Enter **Quantity**.

Manage Line						
Delete Line						
No.	Description	Location Code	Bin Code	Quantity	Unit of Measure Code	
1012	Whse Shipments - 1	EAST - SE	SE-001	0	PCS	

Click on the cell **Tax Group Code**

Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Lin Amount Excl. Tax
Whse Shipments - 1	2	PCS	18.00	*	36.0

Click on the link in cell **Code** with the value **SUPPLIES**

Sales Lines		Manage Line		Code ↑		Description
				FURNITURE		Taxable Olympic
				LABOR		Labor on Job
				MATERIALS		Taxable Raw Mat
				NONTAXABLE		Nontaxable
				SUPPLIES		Taxable Olympic
				+ New		
Type	Description					
→ Item	Whse Shipments - 1	EAST - SE	SE-001	2		

The following demonstrates opening the linked Sales Order, creating the Warehouse Shipment, and posting the shipment.



Click on the field **Sales Doc No.**

The screenshot shows a form with several fields. The 'Sales Doc No.' field is highlighted with a red box and contains the value 'S-ORD101011'. Other fields include 'Deposit Amount' (0.00), 'Contract Total' (17,992.80), 'Outstanding Amount' (17,992.80), and 'Advanced Proforma' (toggle switch).

Click on the navigation menu item popup **Home**

The screenshot shows a 'Rental Contract' popup window. The 'Home' button is highlighted with a red box. The window title is 'Sales Order - S-ORD101011 · Trey Research'. The 'General' tab is selected, showing 'Customer Name' as 'Trey Research'.

Click on the navigation menu item **Create Warehouse Shipment**

The screenshot shows the 'Rental Contract' popup window with the 'Home' button selected. The 'Create Warehouse Shipment' button is highlighted with a red box. The window title is 'Sales Order - S-ORD101011 · Trey Research'.

Click on the button **OK**

The screenshot shows a confirmation dialog box with the message '1 Warehouse Shipment Header has been created.' The 'OK' button is highlighted with a red box.



Click on the button **Post Shipment...**

Warehouse Shipment

SH000001

Home

Prepare

Print/Send

Shipment

More options

Create Pick...

Post Shipment...

Release

General

No.

SH000001

Click on the button **OK**

Assigned User ID

Ship

Ship and Invoice

OK

Cancel

Click on the button **OK**

4/8/2024

External Document No.

Number of source documents posted: 1 out of a total of 1.

Ship lines have been posted.

OK

e Line

Select items...

Item Referen...	Description	Location Code	Bin Code
No.			

Click on the button **Close**

Location Code	Bin Code	Quantity	Qty. to Assemble to Order
EAST - SE	SE-001	2	

Close

Click on the cell **Quantity Shipped** with the value **2**

Note that on the contract Sales line the Quantity Shipped has been updated with the quantity shipped.

Sales Lines					
Manage Line					
New Line		Delete Line			
Type	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Qty. Assigned
→ Item	0	2	2	0	
		2			

3.10.Creating Rental Documents from a Contact

3.10.1. Creating Rental Documents from a Contact Card Overview

3.10.1.1. Overview

The ODT Rentals provides the ability to create rental documents directly from a Contact card.

The Contact card, Process menu option contains the options, Create Rental Quote and Create Rental Contract.

A Rental Quote can be created directly from a Contact card when the Contact has any of the following configurations.

- Type = Person, Company No. and Name are blank and Business Relation = None
- Type = Person, Company No. = a Contact No. and Name that has Type = Company and Business Relation = Customer
- Type = Company, Company No. = the same as the contact No. and Business Relation = Customer

A Rental Contract can be created directly from a Contact card when the Contact has either of the following configurations.

- Type = Person, Company No. = a Contact No. and Name that has Type = Company and Business Relation = Customer
- Type = Company, Company No. = the same as the contact No. and Business Relation = Customer

IMPORTANT:

A Rental Contract cannot be created from a Contact card when the Contact card configuration consists of Type = Person and the Company No. and Business Relation are blank.

3.10.2. How to Create a Rental Document From a Contact Card

3.10.2.1. Creating a Rental Document From a Contact Card Overview

The examples which will be demonstrated include those where the Contact card has the following configurations.

- Type = Person, Company No. and Name are blank and Business Relation = None
- Type = Person, Company No. = a Contact No. and Name that has Type = Company and Business Relation = Customer
- Type = Company, Company No. = the same as the contact No. and Business Relation = Customer

3.10.2.1.1. Contact with Type = Person and No Company No. or Business Relation

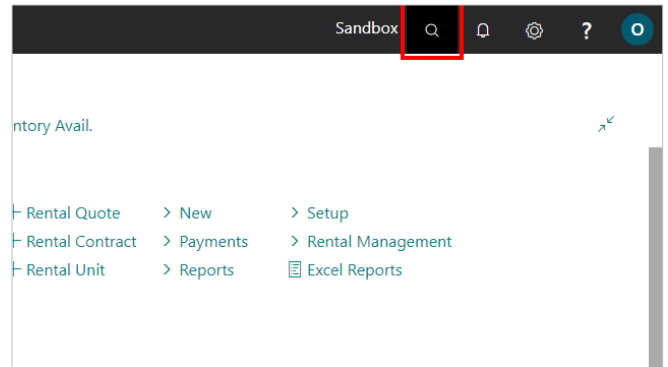
The following example demonstrates creating a Rental Quote when the Contact card configuration is:

- Type = Person, Company No. and Name are blank and Business Relation = None

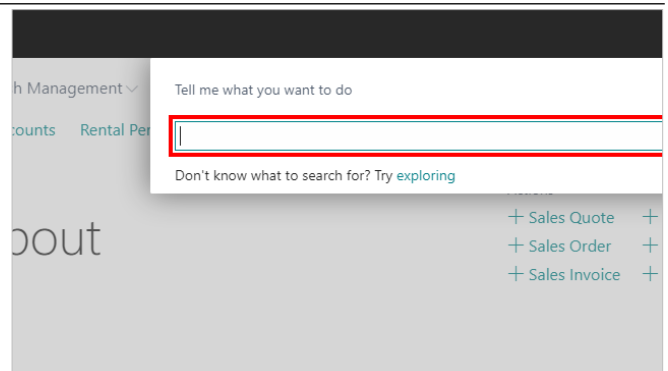
IMPORTANT

With the above Contact configuration a Rental Contract cannot be created from the Contact card.

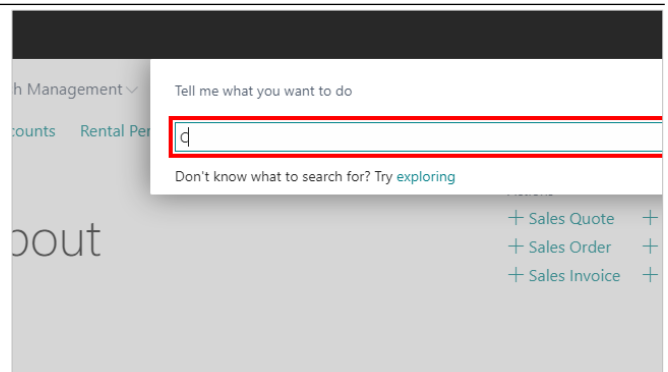
Click on the link **Search**



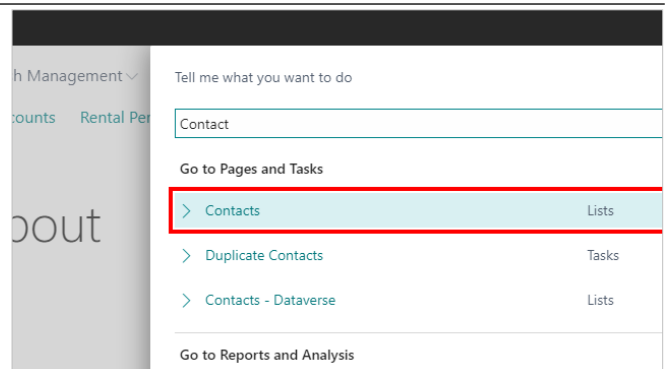
Click on the field **Tell me what you want to do**



Enter **Tell me what you want to do**.



Click on **Contacts Lists** ☐





Click on the link in cell **No.** with the value **CT000025**

No.	Name ↑	Company
CT000025	John Smith	
CT000001	Adatum Corporation	Adatum
CT000002	Robert Townes	Adatum
CT000007	Alpine Ski House	Alpine S
CT000008	Ian Deberry	Alpine S

Click on **the General tab**

Note that the Type is set to Person, the Company No. and Name are blank and Business Relation displays None.

General

No. CT000025

Name John Smith

Type Person

Company No.

Company Name

Business Relation None

Search Name JOHN SMITH

Click on the navigation menu item popup **Process**

Process

No. CT000025

Name John Smith

Click on the navigation menu item **Create Rental Quote**

Create Rental Quote

No. CT000025

Name John Smith



ODT Rentals Online Help

Click on the field **Sell-to Customer Name**

Note that the Sell-to Customer Name is blank. This is as the Contact card did not have a Company No. or a Business Relation.

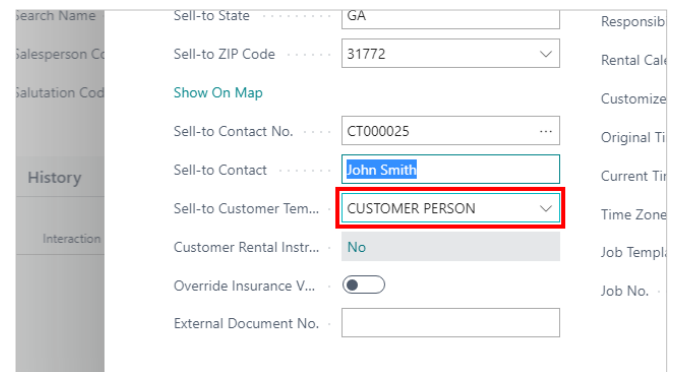
Click on the button **Show more**

Note that the following fields on the Rental Quote are automatically populated.

Click on the field **Sell-to Contact No.**

Click on the field **Sell-to Contact**

Click on the field **Sell-to Customer Template Code**



The rental lines, and if applicable, sales lines can be populated and the Make Contract ran to create a Rental Contract.

To learn about these processes, see the online ODT Rental Help, Processing Rentals, Rental Quotes, How to Create a Rental Quote Using a Contact.

3.10.2.1.2.

Relation

Contact with Type = Person, Company No. and Business

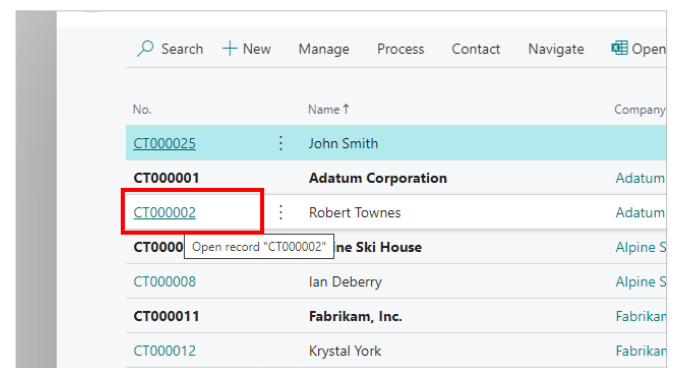
The following example demonstrates creating a Rental Quote when the Contact card configuration is:

- Type = Person, Company No. = a Contact No. and Name that has Type = Company and Business
Relation = Customer

NOTE:

A Rental Contract can be created from the Contact card when the card contains the configuration noted above.

Click on the link in cell **No.** with the value **CT000002**

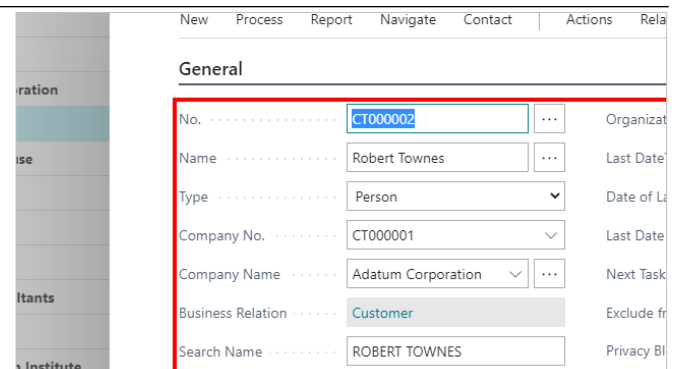


No.	Name	Company
CT000025	John Smith	
CT000001	Adatum Corporation	Adatum
CT000002	Robert Townes	Adatum
CT000003	Open record "CT000002" the Ski House	Alpine S
CT000008	Ian Deberry	Alpine S
CT000011	Fabrikam, Inc.	Fabrikam
CT000012	Krystal York	Fabrikam

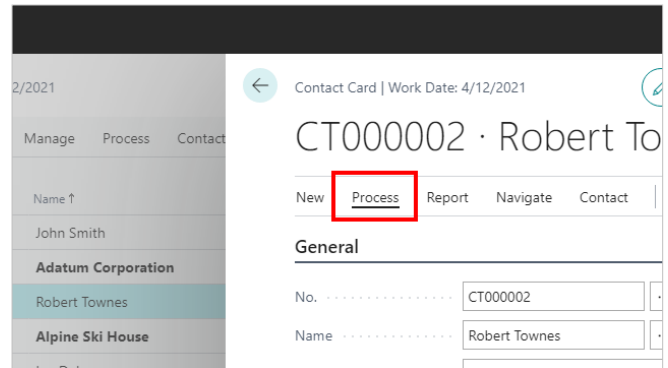
Click on **General Tab**

Note that the Contact has Type set as Person and has a Company No. and Name of a different Contact and a Business Relation of Customer.

By clicking on the Business Relation, Customer, the Customer card of the the Company No. Contact is linked to will be displayed.



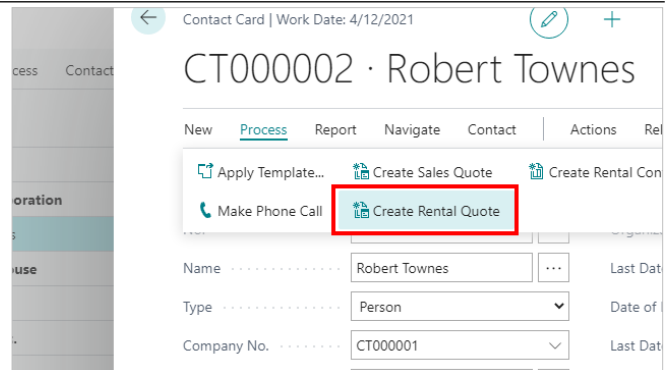
Click on the navigation menu item popup **Process**



The screenshot shows a contact card for 'CT000002 · Robert Townes'. The 'Process' menu item is highlighted in red. The contact card displays the name 'Robert Townes' and the company 'Adatum Corporation'.

Click on the navigation menu item **Create Rental Quote**

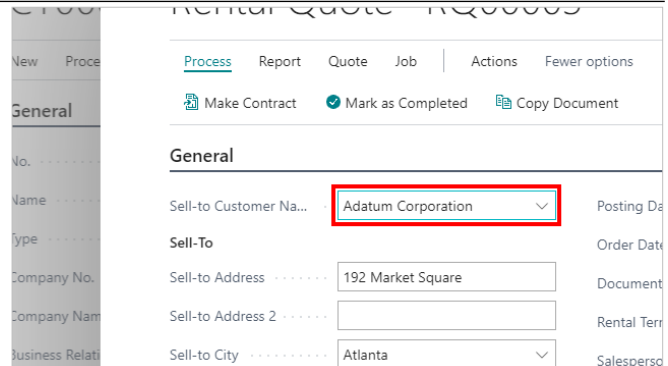
To create a Rental Contract instead of a Rental Quote, then select Create Rental Contract in the Process menu options.



The screenshot shows the 'Process' menu with 'Create Rental Quote' highlighted in red. The contact card displays the name 'Robert Townes' and the company 'Adatum Corporation'.

Click on the field **Sell-to Customer Name**

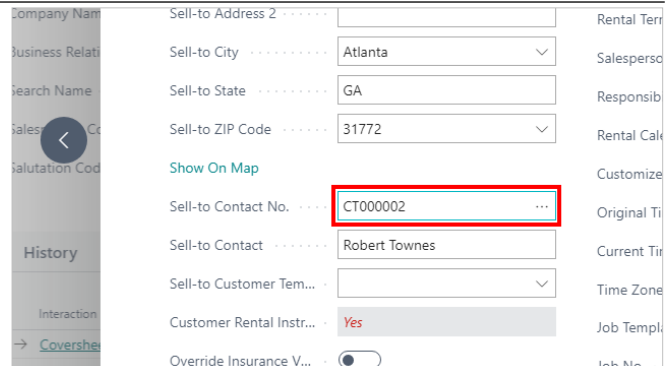
Note that the Sell-to Customer Name and address on the quote is populated with the Name and address from the Customer card the contact was linked to.



The screenshot shows the 'General' section of the quote form. The 'Sell-to Customer Name' field is populated with 'Adatum Corporation'. The 'Sell-to Address' field is populated with '192 Market Square' and the 'Sell-to City' field is populated with 'Atlanta'.

Click on the field **Sell-to Contact No.**

Note that the Sell-to Contact No. and Sell-to Contact are populated, from the Contact card the quote was created from.



The screenshot shows the 'General' section of the quote form. The 'Sell-to Contact No.' field is populated with 'CT000002'. The 'Sell-to Contact' field is populated with 'Robert Townes'.

When Create Rental Quote is selected, the rental lines, and if applicable, sales lines can be populated and the Make Contract ran to create a Rental Contract.

To learn about these processes, see the online ODT Rental Help, Processing Rentals, Rental Quotes.

When Create Rental Contract is selected, then see Online ODT Rental Help, Processing Rentals. Then review the applicable help in Rental Contracts, Rental Contracts using Billing Cycles or Rental Contracts with Units Linked to Items.

3.10.2.1.3.

Contact with Type = Company, Company No. and Business



Relation

The following example demonstrates creating a Rental Quote when the Contact card configuration is:

- Type = Company, Company No. = the same as the contact No. and Business Relation = Customer
- NOTE:** A Rental Contract can be created from the Contact card when the card contains the configuration noted above.

Click on the link in cell **No.** with the value **CT000001**

Contacts | Work Date: 4/12/2021

No.	Name ↑	Company
CT000025	John Smith	
CT000001	Adatum Corporation	Adatum
CT000002	Robert Townes	Adatum
CT000007	Alpine Ski House	Alpine S
CT000008	Ian Deberry	Alpine S
CT000011	Fabrikam, Inc.	Fabrikan

Click on **General Tab**

New Process Report Navigate Contact Actions Rel

General

No.	CT000001	...	Organizat
Name	Adatum Corporation	...	Last Date
Type	Company	▼	Date of La
Company No.	CT000001	▼	Last Date
Company Name	Adatum Corporation	▼ ...	Next Task
Business Relation	Customer		Exclude fr
Search Name	ADATUM CORPORATION		Privacy Bl

Click on the navigation menu item popup **Process**

2/2021

Manage Process Contact

Name ↑

John Smith

Adatum Corporation

Robert Townes

Alpine Ski House

CT000001 · Adatum C

New **Process** Report Navigate Contact

General

No.	CT000001	...
Name	Adatum Corporation	...

Click on the navigation menu item **Create Rental Quote**

To create a Rental Contract instead of a Rental Quote, then select Create Rental Contract in the Process menu options.

CT000001 · Adatum Corpora

New **Process** Report Navigate Contact Actions Rel

Apply Template... Create Sales Quote Create Rental Con

Make Phone Call **Create Rental Quote**

Name	Adatum Corporation	...	Last Dat
Type	Company	▼	Date of
Company No.	CT000001	▼	Last Dat



Click on the field **Sell-to Customer Name**

Note that the Sell-to Customer Name and address on the quote is populated with the Name and address from the Customer card the contact was linked to.

Click on the field **Sell-to Contact No.**

Note that the Sell-to Contact No. and Sell-to Contact are populated, from the Contact card the quote was created from.

When Create Rental Quote is selected, the rental lines, and if applicable, sales lines can be populated and the Make Contract ran to create a Rental Contract.

To learn about these processes, see the online ODT Rental Help, Processing Rentals, Rental Quotes.

When Create Rental Contract is selected, then see Online ODT Rental Help, Processing Rentals. Then review the applicable help in Rental Contracts, Rental Contracts using Billing Cycles or Rental Contracts with Units Linked to Items.

3.11.Resolving Rental Shortages

3.11.1. Resolving Rental Shortages Overview

3.11.1.1. Overview

The Resolving Rental Shortages consists of the following features.

Reconcile Quantity Feature

The Reconcile Quantity feature provides a Rental Shortage List report, to assist users in determining which contracts and contract lines have a shortage and need to be reviewed and addressed before shipment of the units can be completed.

The Rental Shortage List report contains the Rental Contract No., Customer Name, Rental Unit No., Rental Start and End Date, quantity required, available quantity, quantity short, scheduled receipt quantity, purchase order no. and indicates there is a shortage.

The report can be ran from the Business Manager and Sales Order Processor profiles home page by selecting Reports then Rental Reports or from a Rental Contract. The report can as well be scheduled to run using Job Queue in order to run the report off hours.

Resolve Rental Shortages

The Resolve Rental Shortages provides the ability to resolve the shortages, from the Rental Contract.

The feature including the ability to transfer rental product from one rental location to another rental location, or create a purchase order to purchase items or sub-rent product.



When a unit is linked to an item or fixed asset, then when a transfer is used to resolve the shortage for the unit, the item or fixed asset is transferred to the selected rental location as well.

Rental Shortage Cues

Rental Shortages cues displaying the number of contract and contract lines are available to be displayed on the Business Manager and Sales Order Processor role centers by enabling the field, Shortage Cues Visible, on Rental Management Setup. The cues are updated when the Rental Shortage List report is ran.

Rental Contracts, Rental Lines

A field called, Shortage, is available to add to the Rentals Lines using Personalize. When the report is ran and shortages are determine, then the field on the rental lines will be checked to indicate that a shortage exists for the unit or linked item selected on the rental line. If prior shortages reported have been addressed, then the field will be cleared.

3.11.2. How to Setup for Resolving Shortages Features

3.11.2.1. Overview

The setup for Resolving Rental Shortages consist of two setups.

- In order to view the Shortage Cues, Rental Management Setup requires the enabling of the field, Shortage Cues Visible
- The setup of a Job Queue for running the report during off hours. This setup is optional.

Organizations may want to setup a recurring Job Queue for running the report as the Shortages Cues and Rental Lines, Shortage field are only updated when the report is ran.

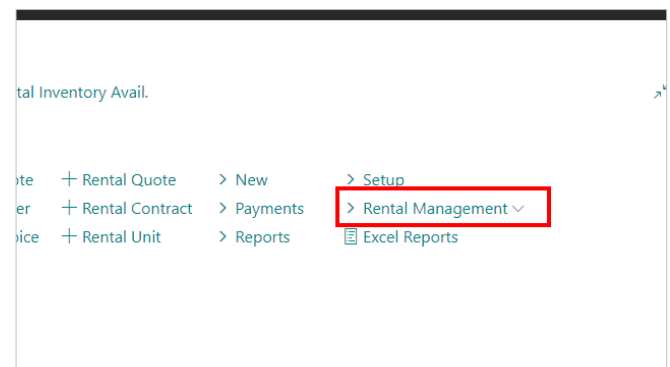
Organizations that have a large volume of Rental Contracts or contracts with a large volume of Rental Lines may wish to setup a recurring Job Queue for running the report during off hours.

3.11.2.2. How to Setup Rental Management Setup for Resolving Shortages

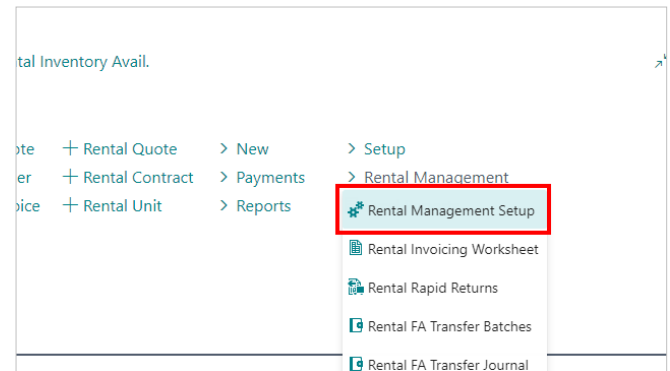
The following demonstrates the setup on Rental Management Setup to have the Shortage Cues visible on the Business Manager and Sales Order Processor role center profiles.

The steps have been completed using the Business Manager profile.

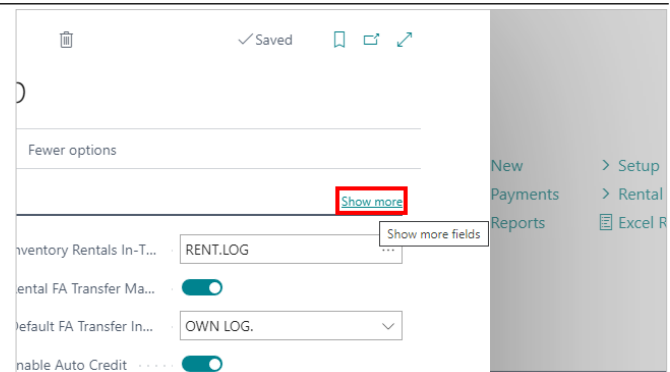
Click on the navigation menu item popup **Rental Management**



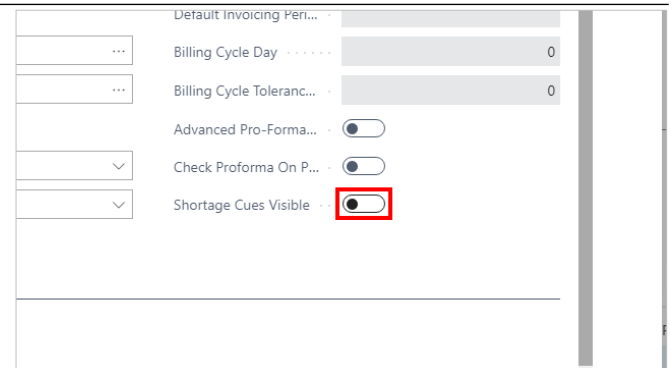
Click on the navigation menu item **Rental Management Setup**



Click on the button **Show more**



Click on the toggle field **Shortage Cues Visible**



The following picture displays the Rental Shortages Cues that are displayed in the Rental Activities section when the Shortage Cues Visible is enabled.

- The Rental Contracts - Shortages cue will display the number of Rental Contracts that contain any shortages on the Rental Lines. When the cue is clicked on a list of the Rental Contracts will be displayed.
- The Shortages cue will display the number of Rental Lines on which the Shortage field is checked. When the cue is clicked on a list of these Rental Lines will be displayed.

IMPORTANTNOTE:

The cues are only updated when the Rental Shortages List is ran and the shortages are calculated.



3.11.2.3.

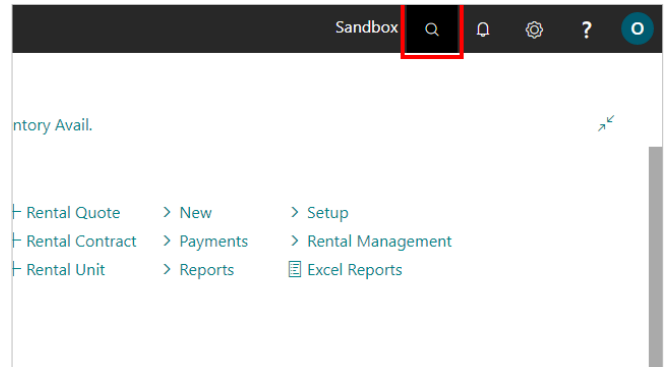
How to Setup a Job Queue for Running the Rental Shortage

List

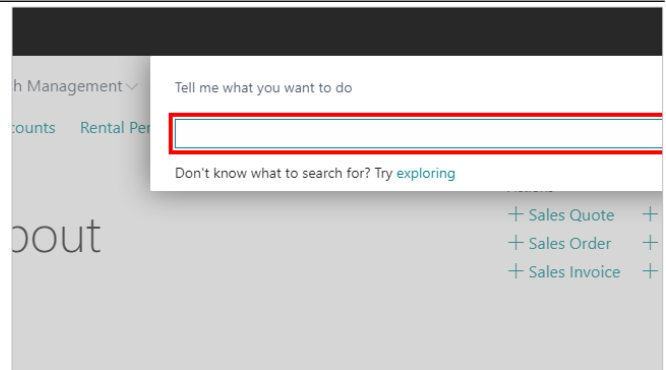
The following demonstrates the setup of a recurring Job Queue for running the Rental Shortage List report.

The individual setting up the Job Queue must have the applicable permissions to setup a Job Queue.

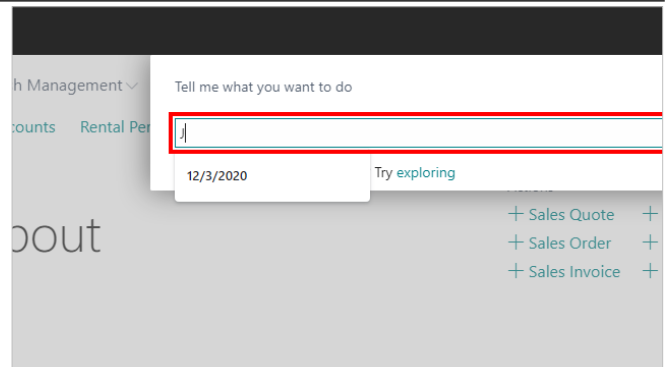
Click on the link **Search**



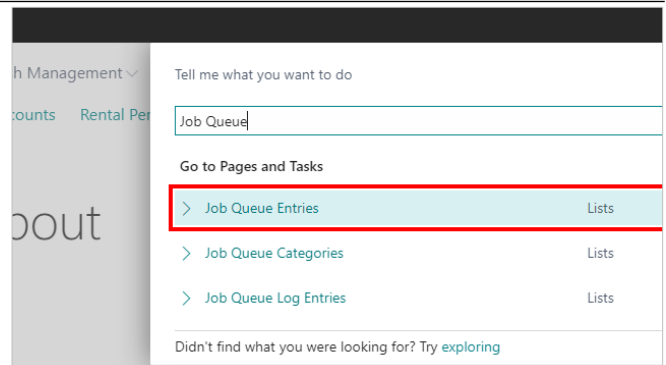
Click on the field **Tell me what you want to do**



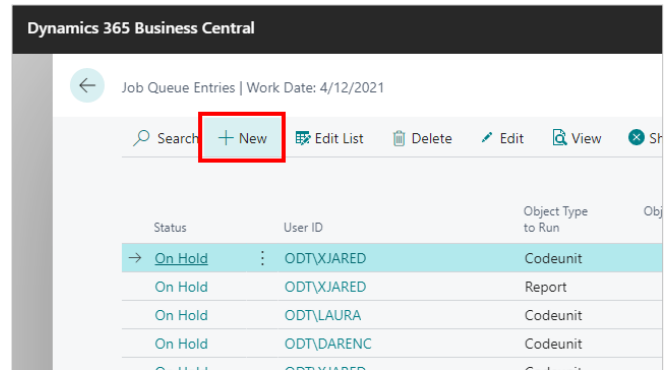
Enter the text **Job Queue**.



Click on **Job Queue Entries Lists** ☐



Click on the navigation menu item **New**



Dynamics 365 Business Central

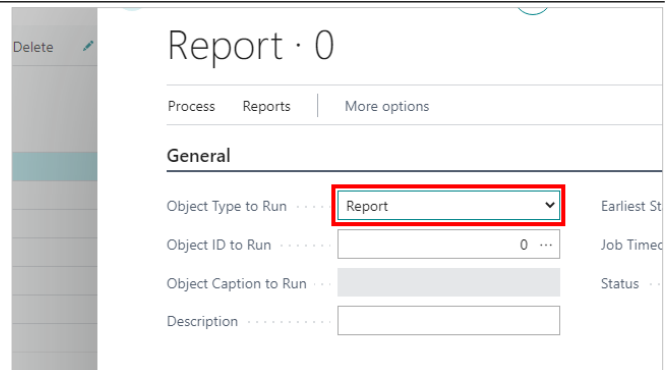
Job Queue Entries | Work Date: 4/12/2021

Search + New Edit List Delete Edit View

Status	User ID	Object Type to Run	Obj
→ On Hold	ODT\XJARED	Codeunit	
On Hold	ODT\XJARED	Report	
On Hold	ODT\LAURA	Codeunit	
On Hold	ODT\DARENC	Codeunit	

Click on the field **Object Type to Run**

The Type must be set to Report.



Report · 0

Process Reports More options

General

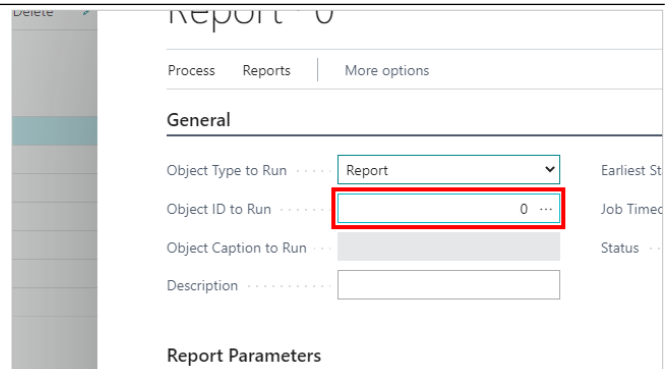
Object Type to Run Report Earliest St

Object ID to Run 0 Job Timec

Object Caption to Run Status

Description

Click on the field **Object ID to Run**



Report · 0

Process Reports More options

General

Object Type to Run Report Earliest St

Object ID to Run 0 Job Timec

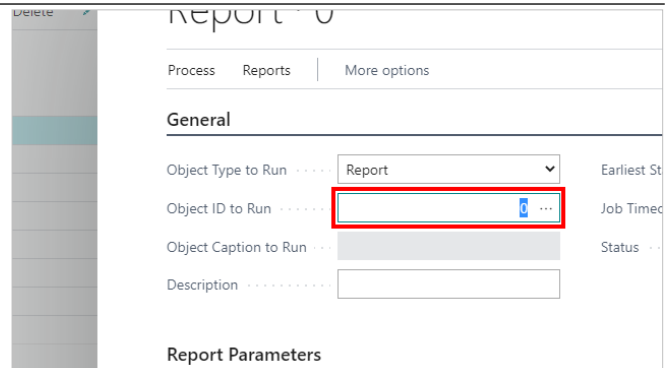
Object Caption to Run Status

Description

Report Parameters

Enter the text **70014229**.

The Report ID has been entered, however, should the lookup be used, then search in the list for Rental Shortage List.



Report · 0

Process Reports More options

General

Object Type to Run Report Earliest St

Object ID to Run 70014229 Job Timec

Object Caption to Run Status

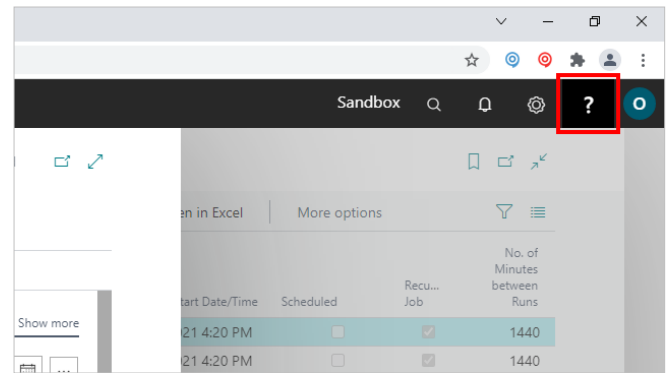
Description

Report Parameters

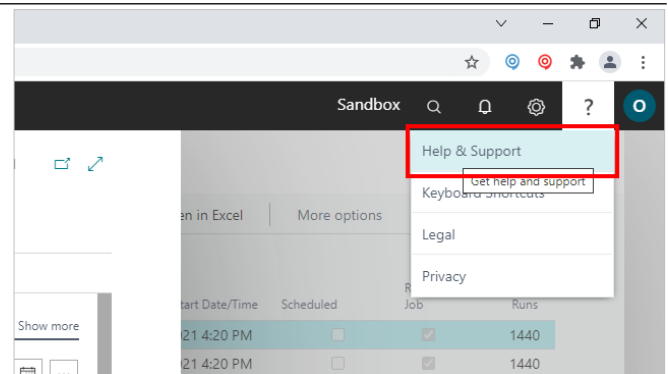
Configure the remainder of the Job Queue Entry per the Microsoft Dynamics 365 Business Central help.

When the Job Queue card is open the following steps will open the help.

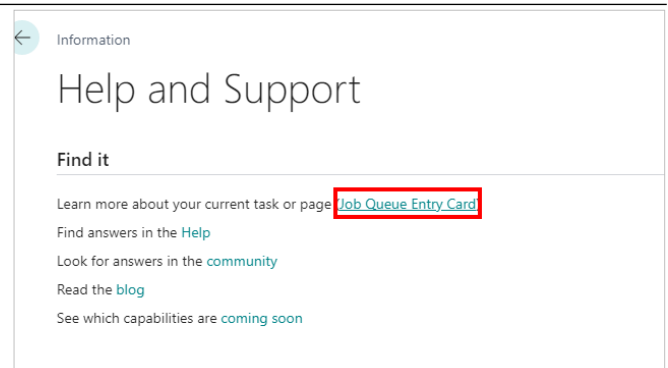
Click on the link **Help**



Click on the menu item **Help & Support**



Click on the link **Job Queue Entry Card**



The following picture displays an example of the Job Queue Setup, prior to selecting Process, Set Status to Ready so that the Job Queue for the report will run as scheduled.

Report · 70014229 · Rental Shortage List

Process
Reports
More options

General
Show more

Object Type to Run
Report

Object ID to Run
70014229

Object Caption to Run
Rental Shortage List

Description
Rental Shortage List

Earliest Start Date/Time
4/13/2021 12:00 AM

Job Timeout
12 hours

Status
On Hold

Report Parameters

Report Request Page ...

Printer Name

Report Output Type
PDF

Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Run on Sundays

Next Run Date Formula

Starting Time
1:00:00 AM

Ending Time

No. of Minutes between...
1440

Inactivity Timeout Peri...
5

3.11.3. Reconciling Rental Shortage Quantities

3.11.3.1. Overview

The Reconciling Rental Shortage consists of the Rental Shortages List and the field, Shortage, which is available to add to the Rental Contract, Rental Lines using Personalize.

The Rental Shortages List is used to determine whether there are any shortages of rental product on the Rentals Lines for Rental Contracts which have not been shipped.

When the Rental Shortage List is ran and a shortage is determined to exist on a Rental Line, then the Shortage field will be checked on the line.

Once the rental unit/group lines with shortages have been determined, then the shortages can be addressed directly from the Rental Contract using the Resolve Shortages feature.

The Rental Shortage List focus is on Rental Units linked to an Item and rental groups and prints per Rental Contract for those contracts that have a shortage or shortages on the Rental Lines.

The determination of shortages is calculated for each rental unit linked to an item or group and child lines on the Rental Contracts, Rental Lines which have not been shipped.

All Rental Contract, Rental Lines and all Rental Quote, Rental Lines which have the Commit Reservation checked are taken into account in determining the quantity that is available.

When a Rental Unit on a contract Rental Line is linked to an Item, then Item availability and the unit Rental Reservation Entries are taken into account in determining if there is a shortage.

When the Rental Lines have a rental group then the Rental Reservation Entries are taken into account in determining if there is a shortage.

The reconciliation of the rental group available quantity is determined based on the Location Code field on the group rental line.

Therefore the reconciliation is impacted by:

- Whether the group rental line has a Location Code specified.
- Whether the Rental Units assigned to a group have a Location specified on the Rental Unit cards.
- Whether any of the child units have been selected on the Rental Lines.

NOTE:

If a child unit of a rental group is not blocked, however, is linked to a Fixed Asset which is blocked, then the child unit will be excluded in the calculation of the group available quantity.



3.11.3.2. Rental Shortage List Report


Rental Shortage List - Request Page

The following picture displays the Rental Shortage List request page where filters can be specified when running the report.

Such as specific or a range of Rental Contract Nos., a specified Sell-to Customer or a specific Rental Location.


Rental Shortage List



Printer (Handled by the browser) 


Filter: Rental Contract

× No.

× Sell-to Customer No. 

+ Filter...

Filter: Rental Line

× Location Code 

+ Filter...

Advanced >

Send to...

Print

Preview & Close

Cancel

Rental Shortage List Report

The following picture displays an example of one contract from the Rental Shortage List report.

The report prints per Rental Contract and only includes contracts which contains rental lines with shortages.

ODT Rentals Online Help

5/15/2024

1022/2540



Rental Shortage List													
Rental Contract Number:				RC00015									
Rental Contract Date:				4/12/2021									
Sell To: School of Fine Art				Ship To: School of Fine Art				Customer ID		30000			
Meagan Bond				Meagan Bond				SalesPerson		Jim Olive			
10 High Tower Green				10 High Tower Green				External Doc. No.:					
, FL 37125				, FL 37125				Contact Name:		Meagan Bond			
								Contact E-Mail:		meagan.bond@contoso.com			
								Contact Phone:					
Type	No.	Unit	Description	Location	Qty. Required	Avail. Qty.	Qty. Short	Sched. Rcpt. Qty.	Purch. Order No.	Rental Start Date	Rental End Date	Required Shipping Date	Shortage
Item	1000	PG-001	Portable Generators	CENTRAL	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes
Fixed Asset		RU00001	Buckeye Ditcher Group	WEST	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes

- The Type column displays the master record type when a unit is linked to another master record.
- The Unit column displays the Rental Unit No.
- The Description column displays the description that is on the Rental Line.
- The Location column displays the Location Code that is on the Rental Line.
- The Quantity Required displays the Rental Quantity from the Rental Line that applies to the Location Code.
- The Avail. Qty. column displays the quantity that is available in the Location for the dates on the line.
- The Qty. Short column displays the quantity shortage related to the Qty. Required.
- The Sched. Rcpt. Qty. column will display a quantity when the Rental Unit is linked to an Item and a Purchase Order has been created using the Resolve Shortages, but the item has not been received.
- Purch. Order No. will display the Purchase Order No., when a Purchase Order has been created using Resolve Shortages and the item has not been received.
- The Rental Start Date and Rental End Date display the dates from the Rental Line.
- The Required Shipping Date column displays the date from the same field on the Rental Line.
- The Shortage column displays Yes and has updated the field on the Rental Line for the unit.

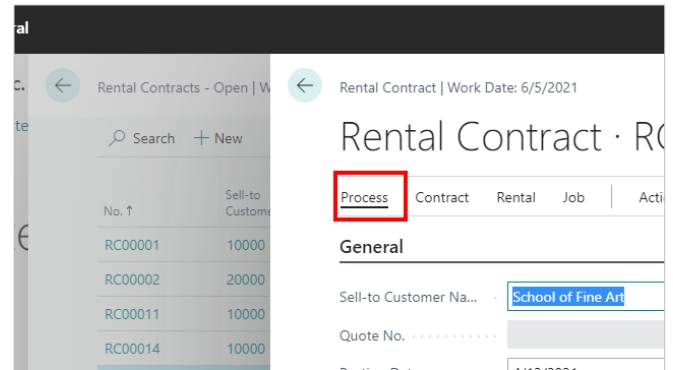
3.11.3.3. How to Run the Rental Shortage List from a Rental Contract

The following demonstrates the running of the Shortage List from a Rental Contract.

The Rental Lines contain:

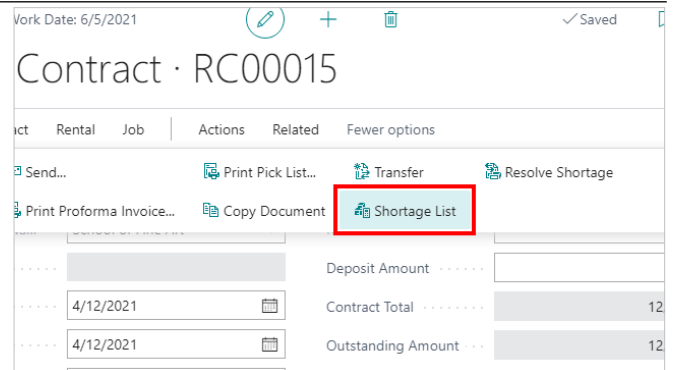
- A Rental Unit, PG-001, linked to an Item with a Location Code, Central, in which there is no item inventory.
- A Rental Group with a Rental Quantity of 2 that exceeds the quantity available, 1, in the Location Code of West selected on the group line. The child units assigned to the group are linked to Fixed Assets. No child units have been selected on either of the child lines.

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract' screen for contract RC00001. The 'Process' button is highlighted in a red box. The 'General' tab is selected, showing the 'Sell-to Customer Name' as 'School of Fine Art' and the 'Quote No.' as '10000'.

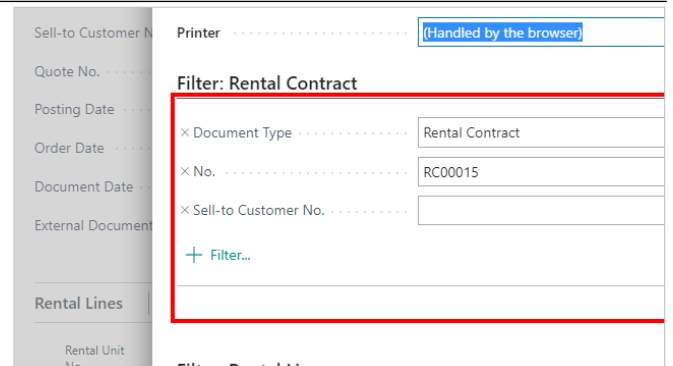
Click on the navigation menu item **Shortage List**



The screenshot shows the 'Rental Contract' screen for contract RC00015. The 'Shortage List' button is highlighted in a red box. The 'Actions' tab is selected, showing options like 'Send...', 'Print Pick List...', 'Transfer', 'Resolve Shortage', 'Print Proforma Invoice...', 'Copy Document', and 'Shortage List'.

Click on **Filter list by: Rental Contract**

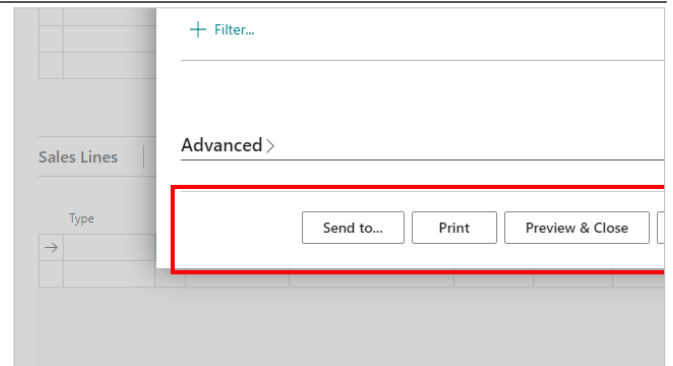
When the Shortage List is ran from a Rental Contract the Type field defaults to Rental Contract and the No. field will display the Rental Contract No. automatically.



The screenshot shows the 'Shortage List' filter screen. The 'Filter: Rental Contract' section is highlighted in a red box, showing the 'Document Type' as 'Rental Contract', the 'No.' as 'RC00015', and the 'Sell-to Customer No.' as '10000'. The 'Printer' field is set to '(Handled by the browser)'.

Click on **Send to... Print Preview & Close Cancel**

Select the preferred option.
If Send to is selected, the option must be PDF to print or save the report.



The screenshot shows the 'Shortage List' filter screen. The 'Send to...' button is highlighted in a red box. The 'Advanced' section is expanded, showing the 'Send to...' button, the 'Print' button, and the 'Preview & Close' button.

The Shortage List prints per Rental Contract and only prints when there are lines that have a shortage.

If there are no shortages on any rental lines of a contract, then when ran from the contract a message will advise that no shortages were found.

The following picture displays the Shortage List report for the contract.

Rental Shortage List													
Rental Contract Number:				RC00015									
Rental Contract Date:				4/12/2021									
Sell To: School of Fine Art				Ship To: School of Fine Art				Customer ID		30000			
Meagan Bond				Meagan Bond				SalesPerson		Jim Olive			
10 High Tower Green				10 High Tower Green				External Doc. No.:					
, FL 37125				, FL 37125				Contact Name:		Meagan Bond			
								Contact E-Mail:		meagan.bond@contoso.com			
								Contact Phone:					
Type	No.	Unit	Description	Location	Qty. Required	Avail. Qty.	Qty. Short	Sched. Rcpt. Qty.	Purch. Order No.	Rental Start Date	Rental End Date	Required Shipping Date	Shortage
Item	1000	PG-001	Portable Generators	CENTRAL	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes
Fixed Asset		RU00001	Buckeye Ditcher Group	WEST	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes

The following picture displays the Rental Lines on the contract after running the Shortage List. Notice that the first line with the unit linked to the item and the rental group lines have the Shortage field checked.

Rental Lines	Manage	Line	Functions	Related	Fewer options								
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Shortage	Rental Terms Code						
→ PG-001	:	Portable Generators	MONTH-PEND	2	CENTRAL	<input checked="" type="checkbox"/>							
RU00001		Buckeye Ditcher Group	MONTH-END	2	WEST	<input checked="" type="checkbox"/>							
		Buckeye Ditcher Group	MONTH-END	1	WEST	<input type="checkbox"/>							
		Buckeye Ditcher Group	MONTH-END	1	WEST	<input type="checkbox"/>							

NOTE:

This contract will be used in the user help on How to Resolve Rental Shortages.

3.11.3.4. How to Run the Rental Shortage List from the Actions - Reports

The following example demonstrates running the Rental Shortage List report for all Rental Contracts from the Action section - Reports option on the Home page of the Business Manager profile.

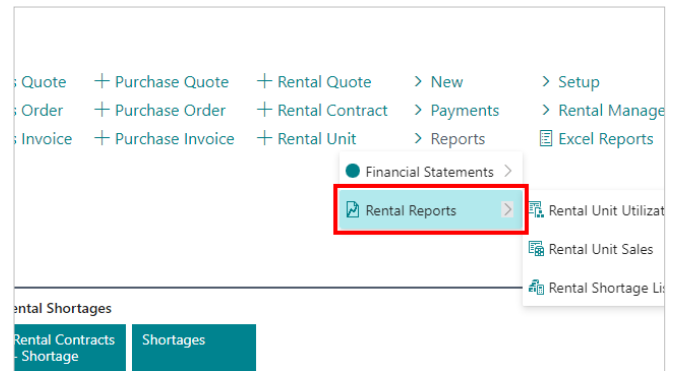
Alternatively the Search can be used to locate and run the report.

Click on the navigation menu item popup **Reports**

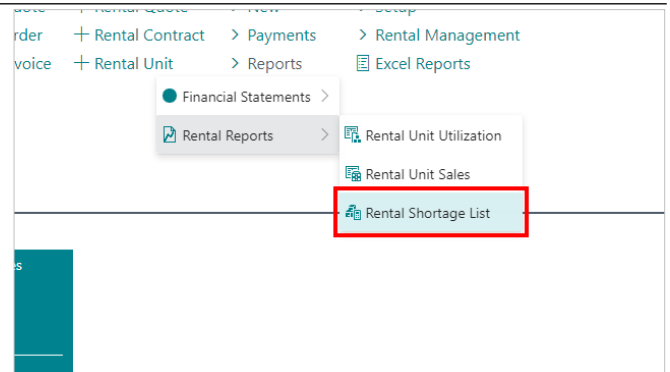
vail. Matrix Rental Inventory Avail.			
+ Purchase Quote	+ Rental Quote	> New	> Setup
+ Purchase Order	+ Rental Contract	> Payments	> Rental Management
+ Purchase Invoice	+ Rental Unit	> Reports	Excel Reports



Click on the navigation menu item popup **Rental Reports**



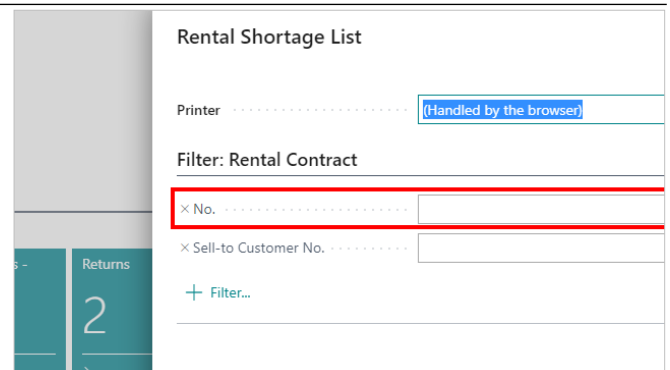
Click on the navigation menu item **Rental Shortage List**



Click on ☐ **No.** : ☐

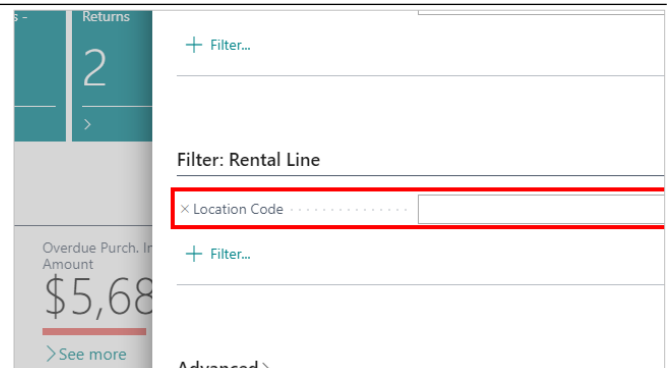
When the No. field is blank, then the quantity reconciliation will be calculated for all rental units and groups which have not been shipped on any open contracts.

When the No. field is populated with multiple contracts or a range of contracts, then the quantity reconciliation will be calculated for all rental units and groups which have not been shipped for only the specified contracts.



Click on ☐ **Location Code** : ☐

When a Location Code is specified then the quantity reconciliation calculation will be restricted to rental unit and group lines not shipped that have the specified Location on the rental line.





ODT Rentals Online Help

Click on **Send to... Print Preview & Close Cancel**

Select the preferred option.
If Send to is selected, the option must be PDF to print
or save the report.

The following picture displays examples of the 2 Rental Contracts which contain shortages on the rental lines.

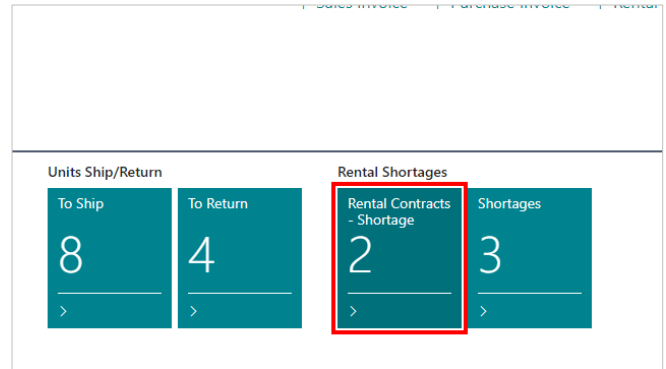
Rental Shortage List													
Rental Contract Number:				RC00014									
Rental Contract Date:				4/12/2021									
Sell To: Adatum Corporation Robert Townes 192 Market Square GA 31772				Ship To: Adatum Corporation Robert Townes 192 Market Square GA 31772				Customer ID: 10000 SalesPerson: Jim Olive External Doc. No.: Contact Name: Robert Townes Contact E-Mail: robert.townes@contoso.com Contact Phone:					
Type	No.	Unit	Description	Location	Qty. Required	Avail. Qty.	Qty. Short	Sched. Rcpt. Qty.	Purch. Order No.	Rental Start Date	Rental End Date	Required Shipping Date	Shortage
		RU00009	16 G Brad Nailers Group	WEST	3	2	1	0		4/12/2021	5/11/2021	4/12/2021	Yes

Rental Shortage List													
Rental Contract Number:				RC00015									
Rental Contract Date:				4/12/2021									
Sell To: School of Fine Art Meagan Bond 10 High Tower Green FL 37125				Ship To: School of Fine Art Meagan Bond 10 High Tower Green FL 37125				Customer ID: 30000 SalesPerson: Jim Olive External Doc. No.: Contact Name: Meagan Bond Contact E-Mail: meagan.bond@contoso.com Contact Phone:					
Type	No.	Unit	Description	Location	Qty. Required	Avail. Qty.	Qty. Short	Sched. Rcpt. Qty.	Purch. Order No.	Rental Start Date	Rental End Date	Required Shipping Date	Shortage
Item	1000	PG-001	Portable Generators	CENTRAL	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes
		RU00001	Buckeye Ditcher Group	WEST	2	0	2	0		4/12/2021	5/11/2021	4/12/2021	Yes

Rental Shortages Cues

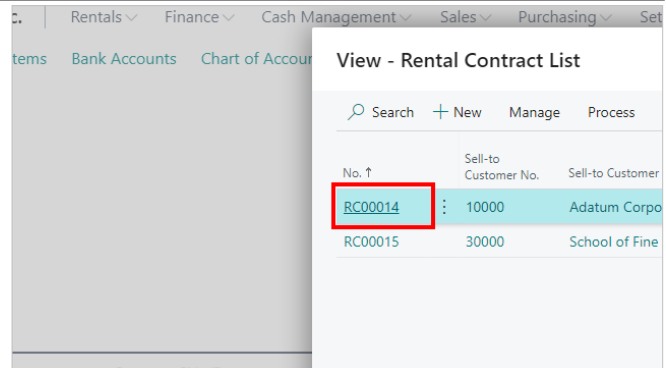
The following demonstrates that the Rental Shortage cues on the Home page are updated after running the Rental Shortage List and the lists which are displayed when the cues are clicked on.

Click on the link **Rental Contracts - Shortage 2**

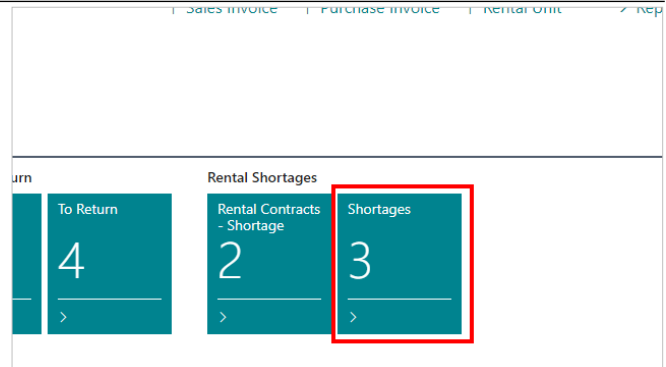


Click on the cell **No.** with the value **RC00014**

Note that the Rental Contract - Shortage list displays the 2 contracts on which shortages were determined when the Rental Shortage List was ran. The contracts can be opened from the list.



Click on the item **Shortages 3**



The following picture displays a listing of rental lines which have the Shortage field checked after running the Rental Shortage List.

The Rental Contract can be opened for a selected line by selecting the Contract menu option.

Shortages | Work Date: 4/12/2021										
Search Contract Open in Excel Related Fewer options										
Document Type ↑	Document No. ↑	Sell-to Customer No.	Line No. ↑	Group No.	Rental Unit No.	Description	Rental Quantity	Rental Start Date	Rental Return Date	Location Code
Rental Contract	RC00014	10000	10000	RU00009	RU00009	16 G Brad Nailers Group	3	4/12/2021	6/11/2021	WEST
Rental Contract	RC00015	30000	10000		PG-001	Portable Generators	2	4/12/2021	5/11/2021	CENTRAL
Rental Contract	RC00015	30000	20000	RU00001	RU00001	Buckeye Ditcher Group	2	4/12/2021	5/11/2021	WEST

3.11.4. How to Resolve Rental Shortages By Transfers and Purchases

Rental Shortages can be addressed from the

3.12.Copying Rental Documents

3.12.1. Copying Rental Documents Overview

3.12.1.1. Overview

The rental copy document feature provides the ability to copy a Completed Rental Contract , an open Rental Contract, a Completed Rental Quote or an open Rental Quote.

These can be copied from a new Rental Quote and Rental Contract for the same or different customer.

The feature provides options for specifying the Rental Start Date and Rental Return Date for the rental lines on the new contract, whether to include the contract header, and whether to recalculate the rental lines.

When copying a Rental Contract, whether open or completed there are conditions that apply.


- When the new contract has a different Customer selected than the contract being copied, then the Include Header is deactivated, and the Recalculate Lines is activated automatically. Neither field can be modified to ensure that the Customer defaults on the new contract are applied to the rental and sales lines. For example, discount settings and dimensions.
- When the contract being copied has a rental group on the rental lines, and if any of the child units are not available for rent, then the child rental line for that unit will be created with the Rental Unit No. field blank
- When the new contract has a different Bill-to Customer selected than the contract being copied which has a Job No. specified on the General tab and the rental and sales lines have the Job No. and Job Task No., then the Job No. and Job Task No are not copied to the new contract header and lines.
- When from a contract a Rental Quote with a Template Job No. is copied the Job Template No. on the header and lines and Job Task No. on the lines are not copied to the new contract.
- When the contract being copied has a rental unit linked to a serialized item, the Item Tracking Entries are not copied. The Serial Nos. will have to be selected on the new contract.
- The Shipment Date on the new contract is set to the date entered in Rental Start Date option field.

When copying a Rental Contract, whether open or completed, there are restrictions that apply that will generate an error advising the reason that the contract cannot be copied.

- If a unit on the contract being copied, is not available to be rented, during the Rental Start to Rental Return Date entered in the options, then the copying of the contract will not be allowed.
- If on the contract being copied, a Sales Line exists with a Fixed Asset, and the invoice has been posted, and the Fixed Asset, Blocked field is enabled, then the copying of the contract will not be allowed.
- If copying a Completed Rental Contract which has a Job No. on the General Tab that has a Job Status of Completed, then the copying of the contract will not be allowed.


3.12.1.2. Copy Rental Document Fields

The following provides an explanation of the fields on the Copy Rental Document page as shown below.



COPY RENTAL DOCUMENT


Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters 

Options

Document Type	Order
Document No.	RC00006 ...
Sell-to Customer No.	10000
Sell-to Customer Name	Adatum Corporation
Rental Start Date	6/28/2020 
Return Date	
Include Header	<input checked="" type="checkbox"/>
Recalculate Lines	<input checked="" type="checkbox"/>

OK
Cancel

- **Document Type**
Specifies the type of rental document that will be copied. The Rental Contract type is Order.
- **Document No.**
This field is for looking up the rental contract that is to be copied.
- **Sell-to Customer No.**
Specifies the sell-to customer number that the new rental document is for.
- **Sell-to Customer Name**
Specifies the sell-to customer name that the new rental document is for.
- **Rental Start Date**
Specifies the rental start date that will be used on the rental lines that are copied from the rental document being copied. The users work date defaults to the field, and should be modified to the date the rental is to commence.

- Return Date

Specifies the rental return date that will be used on the rental lines that are copied from the rental document being copied. If on Rental Management Setup, the field Default Blank Rental Return Date is not enabled and no date is entered, then the return date will be automatically calculated from the Rental Start Date, and the rental period on the rental term on the rental line being copied.

IMPORTANT

Due to an issue, the following process must be used when on Rental Management Setup the field, Default Blank Return Date is enabled.

A Return Date MUST be specified, otherwise the error, The Date not valid, will occur and the contract will not be copied.

- Include Header

Specifies whether the information on the rental document header of the document being copied is to be copied to the new document. This option can only be enabled when the new contract is to or has the same Customer as the contract being copied.

When the Include Header option is activated, then the data on the Completed Rental Contract on the General tab, Shipping tab and Invoice Details tab are copied to the new contract. The Shipping Date on the Shipping tab, however, is set to the same date as entered in the Rental Start Date. In addition, the Dimensions, rental comments, attachments, links and notes on the header are copied to the new contract.

- Recalculate Lines

Specifies whether the rental lines are to be recalculated, when inserted onto the new rental document being created.

When enabled, the rental unit numbers and quantities will remain the same, but the amounts on the rental lines will be recalculated, based on the Rental Unit Price cards and the customer information on the new rental document header.

In this way, the rental prices and discounts that are specifically linked to the Rental Unit and the Customer will be accounted for.

If a Rental Unit on a rental line of the document being copied does not have a Rental Price card for the Rental Term on the line, then the Rental Unit Price will be set to zero on the new contract rental line.

3.12.2. How to Copy Rental Documents

3.12.2.1. Copying a Rental Contract for the Same Customer

The following example demonstrates the copying of a Completed Rental Contract from a Rental Contract.

The same process is used to copy contracts from a Rental Quote and copying a Rental Quote.

In this example, the contract being copied is a Completed Rental Contract and on Rental Management Setup, the field, Default Blank Return Date is disabled. The new contract will be for the same customer, and the Include Header will be enabled when copying the contract. The rental lines will not be recalculated.

The Completed Rental Contract being copied has a Note, a document and a Link attached to the contract header.

On the Rental Lines, the Rental Term is for a monthly rate, with periodic billing in arrears consisting of the following:

- The first line contains a single Rental Unit that does not have the Allow Overbooking field activated on the unit card, and is not linked to an item card. A document was attached to the unit rental line.



ODT Rentals Online Help

- The second line contains a single Rental Unit, which is linked to an Item.
- The third line contains a Rental Unit group with a quantity of 2, which is followed by the 2 units.

The Sale Lines contain a line with an item and has a document attached.

None of the Rental Units on the contract being copied are on any open contracts.

Click on the navigation menu item **Rental Contract**

Click on the field **Sell-to Customer Name**

Click on the link in cell **No.** with the value **10000**

Click on the navigation menu item popup **Process**



Click on the navigation menu item **Copy Document**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC000009

Process Contract Rental Actions Navigate Fewer options

Print... Print Proforma **Copy Document**

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/28/2020

Click on the field **Document Type**

Copy Rental Document

Use default values from Last used options and filters

Options

Document Type **Order**

Document No. *

Sell-to Customer No.

Sell-to Customer Name

Rental Start Date 4/12/2021

Click on the item **Order** in the list

The Document Type field is used to select the type of document that is to be copied, and contains the options of Quote and Order.

Copy Rental Document

Use default values from Last used options and filters

Options

Document Type **Quote**

Document No. *

Sell-to Customer No.

Sell-to Customer Name

Rental Start Date 4/12/2021

Return Date

Click on the lookup button **Document No.**

Copy Rental Document

Use default values from Last used options and filters

Options

Document Type Order

Document No. *

Sell-to Customer No.

Sell-to Customer Name

Rental Start Date 4/12/2021

Return Date

When the Document Type of Order is selected, then the list includes all Rental Contracts, both open and completed. At the right is the field Completed, which when checked indicates that the contract is a completed contract.

When the Document Type of Quote is selected, then the list includes all Rental Quotes, both open and completed. At the right is the field Completed, which when checked indicates that the quote is a completed quote.



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RC00008**

→	RC00001	:	10000	Adatum Corporati
	RC00002		10000	Adatum Corporati
	RC00004		10000	Adatum Corporati
	RC00005		10000	Adatum Corporati
	RC00006		10000	Adatum Corporati
	RC00007		10000	Adatum Corporati
	RC00008	:	10000	Adatum Corporati

Click on the field **Rental Start Date**

Select the date that is to be the Rental Start Date on the rental lines on the new contract.

Document Type Order

Document No. RC00008 ...

Sell-to Customer No. 10000

Sell-to Customer Name Adatum Corporation

Rental Start Date 6/28/2020

Return Date

Include Header ☒

Recalculate Lines ☒

Click on the field **Return Date**

Enter or select the expected Rental Return Date for the units on the new contract, if known.

Document Type Order

Document No. RC00008 ...

Sell-to Customer No. 10000

Sell-to Customer Name Adatum Corporation

Rental Start Date 6/28/2020

Return Date

Include Header ☒

Recalculate Lines ☒

Click on the link **Open the date picker**

Order

RC00008 ...

10000

Adatum Corporation

6/28/2020

1

Open the date picker



Click on a date in the calendar

Click on the toggle field Recalculate Lines

Click on the button OK

The following is a review of the new Rental Contract.

Note that the Rental Lines and Sales Lines were copied from the Completed Rental Contract.

Click on the cell **Rental Unit No.** with the value **RU00025**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
→ RU00007	:	16 G Brad Nailer	MONTH-PE..				
RU00026	:	Wacker Hammer Drill Bits 3/16...	MONTH-PE..				
RU00025	:	Wacker Hammer Drill Group	MONTH-PE..				
RU00025-001	:	Wacker Hammer Drill	MONTH-PE..				
RU00025-002	:	Wacker Hammer Drill	MONTH-PE..				

Click on the cell **Type** with the value **Item**

RU00025-002		Wacker Hammer Drill		MONTH-PE
Sales Lines | Manage | Line | Fewer options				
Type	No.	Description	Location Code	
→ Item	1000	Portable Generators	EAST	

Click on **the Attachments fact box**

Note that the Link and Note were copied from the Completed Rental Contract as the Include Header was activated.

Show more		Details	Attachments (2)
		Links (1) +	
		Open Door Technology Rental Software website. : https://www.opendoorrentalsoftware.com/	
		Notes (1) +	
		Customer is to be contacted when the product is ready. : 8/23/2020 • ODT\ASTAPLETON	

Click on the button ☐ **Details**

Show more		Details	Attachments (2)
		Links (1) +	
		Open Door Technology Rental Software website. : https://www.opendoorrentalsoftware.com/	

Click on **on the Details fact boxes**

Show more		Details	Attachments (2)
		Document Attachments	
		Documents	1
		Rental Line Attachments	
		Documents	1
		Sales Line Attachments	
		Documents	1

Note that the documents attached to the contract header, the rental unit line and the sales line were copied from the Completed Rental Contract as the Include Header was activated and the Recalculate Lines was deactivated.

3.12.2.2.

Copying a Rental Contract for a Different Customer

The following demonstrates the copying of a Completed Rental Contract that has a different Customer than the new contract.



In this example, the same Completed Rental Contract as in the previous example will be copied.

Click on the navigation menu item **Rental Contract**

The screenshot shows the navigation menu with the following items: Posted Documents, Setup & Extensions, and a list of menu items: Transfer Orders, Rental Quotes, Rental Contracts, Rental Periods, and Rental Terms. Under the 'Rental Contracts' menu item, there is a sub-menu with the following items: + Sales Quote, + Sales Invoice, + Sales Order, + Sales Return Order, + Sales Credit Memo, + Rental Quote, + Rental Contract (highlighted in a red box), and + Rental Unit. To the right of the sub-menu, there are links to Tasks, Sales, and Reports. Below the sub-menu, there is a description: 'Create a new rental contract for rental p'.

Click on the field **Sell-to Customer Name**

The screenshot shows the 'Sell-to Customer Name' field highlighted in a red box. Below the field, there is a list of customer names: Adatum Corporation, Trey Research, School of Fine Art, Alpine Ski House, and Relecloud. The 'Trey Research' entry is highlighted in a red box.

Click on the link in cell **No.** with the value **20000**

The screenshot shows the 'No.' field with a dropdown menu. The dropdown menu is open, showing a list of values: 10000, 20000 (highlighted in a red box), 30000, 40000, and 50000. To the right of the dropdown menu, there is a list of customer names: Adatum Corporation, Trey Research, School of Fine Art, Alpine Ski House, and Relecloud. The 'Trey Research' entry is highlighted in a red box.

Click on the navigation menu item popup **Process**

The screenshot shows the 'Process' button highlighted in a red box. The button is located in the top navigation bar of the 'Rental Contract' form. The form title is 'Rental Contract · RC00011'. Below the title, there is a sub-menu with the following items: Process (highlighted in a red box), Contract, Rental, Actions, Navigate, and Fewer options. Below the sub-menu, there is a 'General' section with the following fields: Sell-to Customer Name (Trey Research), Quote No., and Posting Date (6/28/2020).



Click on the navigation menu item **Copy Document**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00011

Process Contract Rental Actions Navigate Fewer options

Print... Print Proforma **Copy Document**

Copy document lines and header information

Sell-to Customer Name Trey Research

Quote No.

Posting Date 6/28/2020

Click on the field **Document No.**

Values from: Last used options and filters

Type Order

Document No. **RC00006** ...

Customer No. 10000

Customer Name Adatum Corporation

Date 6/28/2020

Click on the lookup button **Document No.**

Values from: Last used options and filters

Type Order

Document No. **RC00006** ...

Customer No. 10000

Customer Name Adatum Corporation

Date 6/28/2020

Click on the link in cell **No.** with the value **RC00006**

No. ↑ ▼	Sell-to Customer No.	Sell-to Customer Name
RC00001	10000	Adatum Corporation
RC00002	10000	Adatum Corporation
RC00004	10000	Adatum Corporation
RC00005	10000	Adatum Corporation
→ RC00006	10000	Adatum Corporation
RC00007	10000	Adatum Corporation
RC00008	10000	Adatum Corporation



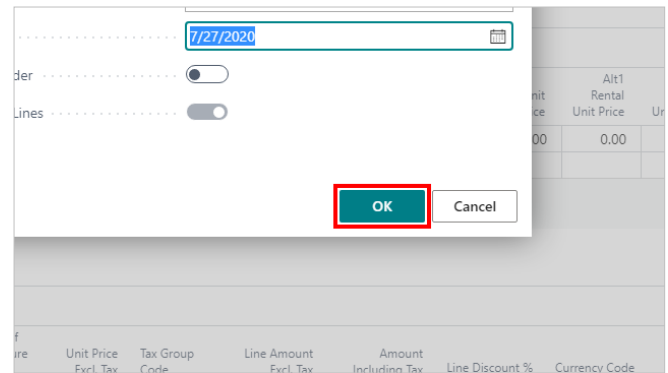
Click on the field **Rental Start Date**

Click on the field **Return Date**

Click on the link **Open the date picker**

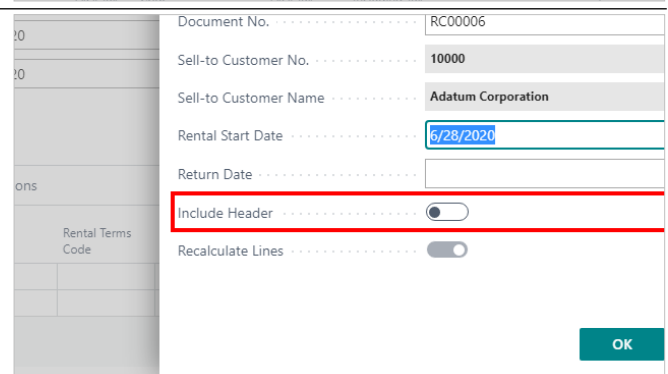
Click on a date in the calendar

Click on the button **OK**



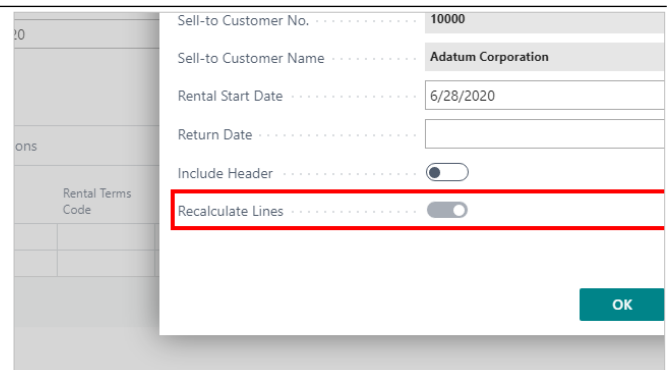
Click on **Include Header**

Note that the Include Header is automatically deactivated when a different customer is on the new contract.



Click on **Recalculate Lines**

Note that the Recalculate Lines field is activated and cannot be modified.

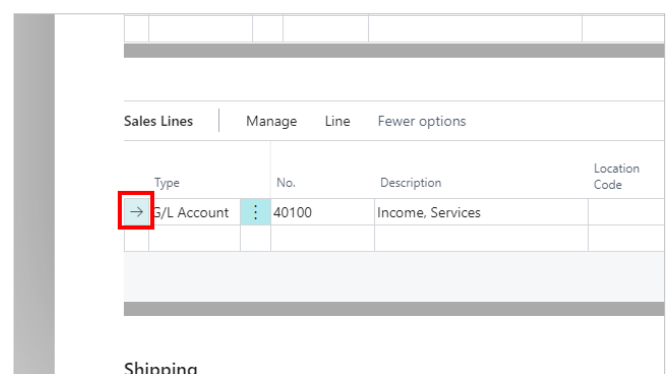


This ensures that if the Customer on the new contract has special prices and discounts configured that they are applied to the sales lines.

And if the Customer has rental line discount percentages configured that they will be applied to the rental lines.

Note that on the Sales Line that the Unit Price was reset to zero and the Tax Group Code were reset to the code on the G/L Account.

Click on **Type = 1, No. = 40100, Description = Income, Services**



Type	No.	Description	Location Code
→ G/L Account	40100	Income, Services	



Click on the cell **Unit Price Excl. Tax** with the value **0.00**

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Incl. Tax
	1		0.00	NONTAXA...	0.00	

Click on the cell **Tax Group Code** with the value **NONTAXABLE**

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Amount Including Tax	Lir
	1		0.00	NONTAXA...	0.00	0.00	

Note in the following pictures that the Link, Note and attachments on the header, rental lines and sales line were not copied from the Completed Rental Contract as the Include Header was not enabled and the Recalculate Lines was enabled.

Click on **Attachments fact box**

Show more

Details

Attachments (0)

Links +

(There is nothing to show in this view)

Notes +

(There is nothing to show in this view)

Click on the button ☐ **Details**

Sandbox

✓ SAVED

Show more

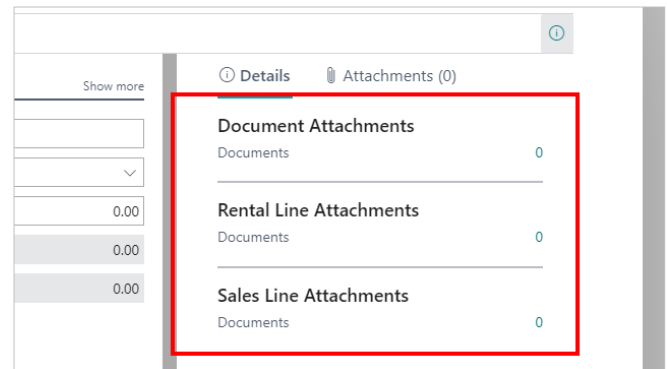
Details

Attachments (0)

Links +

(There is nothing to show in this view)

Click on **Details fact box**



3.13.Blank Rental Return Date

3.13.1. Blank Rental Return Date Feature

3.13.1.1. Overview

Organizations when renting out Rental Units may or may not know, an expected date that the units will be returned.

Rentals provides organizations who, as a standard, have open/indefinite rentals to select a global option on Rental Management Setup.

The Default Blank Return Date field, when checked, specifies that the Rental Return Date on the quote and contract lines will be blank, when a unit or unit group is entered.

When the field is not checked, then the Rental Return Date on the lines will be calculated for a single rental period. Users can change the date to the expected date of return of the unit(s) or delete the date making the rental for that rental line an open/indefinite rental.

On rental lines with a blank rental return date, the Rental Amount lines are created one rental period at a time. When one period is invoiced, then new records are created for the next full rental period, until a Rental Return Date is entered. When Rental Return Date is entered, then Rental Amount Line(s) will be created, if the date entered warrants new records.

With this feature a new field, Invoice No., has been added to the Rental Amount Lines. This field is populated when the invoice is posted. When a Credit Memo is created using the Create Corrective Rental Credit Memo, then the field will be cleared for the invoice credited.

Invoicing

When invoicing, the Posting Date must be equal to, or greater than a full rental period, while the Rental Return Date is blank.

- When greater than a full period, but less than 2 periods, then only 1 period will be invoiced.
- Invoicing is allowed for multiple periods at a time. This is accomplished by setting the Posting Date a date that will create an invoice for multiple periods.

For example, setting the Posting Date to equal or be later than 2 rental periods, but less than 3 periods, when the Rental Return Date is blank. The second Rental Amount line will be created to enable the multi-period invoice to be posted. The Rental Invoicing Worksheet provides for the multiple period invoicing.

With this feature there is no difference between Invoicing Types on the Rental Term. Whether terms have End or Periodic End (Start or Periodic Start) the same generation process occurs, and invoicing is based on ongoing rentals per period.

Therefore, the Invoicing Type, End, can be used and invoicing can occur on a recurring basis with invoicing individual rental periods, period after period until a Rental Return Date is entered.



Returns

The Rental Return Date must be entered, in order to return the units.

When the Rental Return Date has been entered, then base rentals functionality on invoicing will occur from the Contract and from the Rental Invoicing Worksheet.

In that, if the user then enters a Posting date later than Rental Return Date, the popup occurs asking whether the Rental Return Date should be updated on all lines or not.

Documents

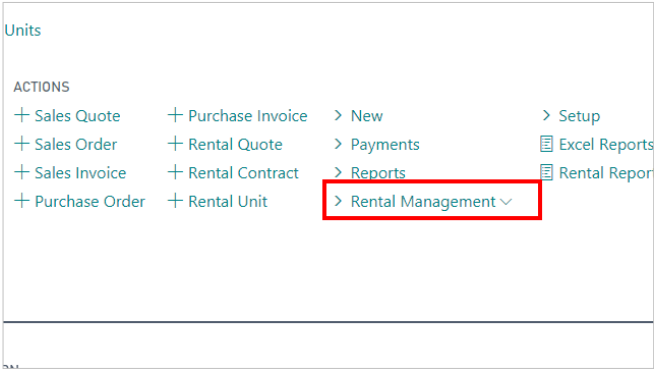
The Rental Quote and Rental Contract documents will print based on a single rental period when the Rental Return Date is blank.

Reprinting of a Rental Contract, after invoicing has occurred, will print based on the number of period billing records that are in the Rental Amount Lines.

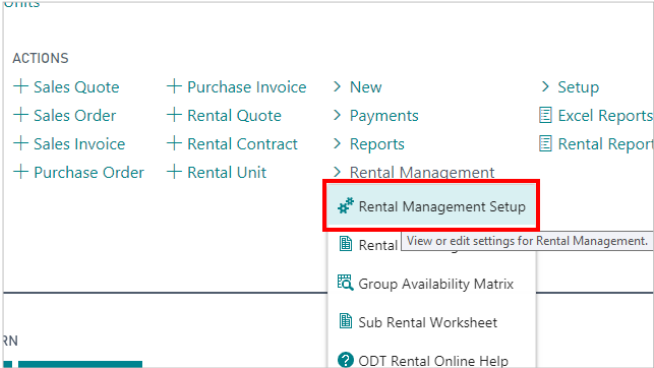
3.13.1.2. Setup for Using Blank Rental Return Date
Profile - Business Manager

The following steps demonstrate setting up rentals to at a global level so that the Rental Return Date is blank on all lines when units are entered on the Rental Lines.

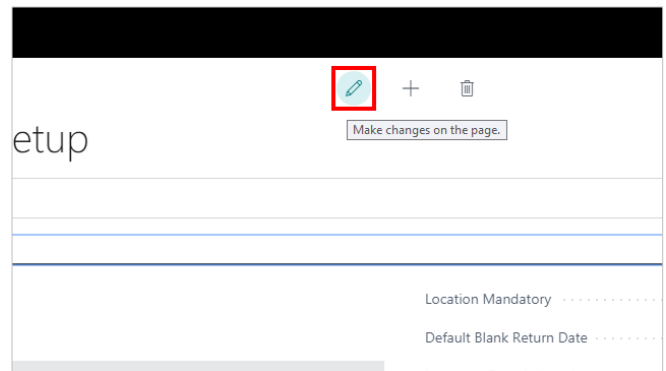
Click on the navigation menu item popup **Rental Management**



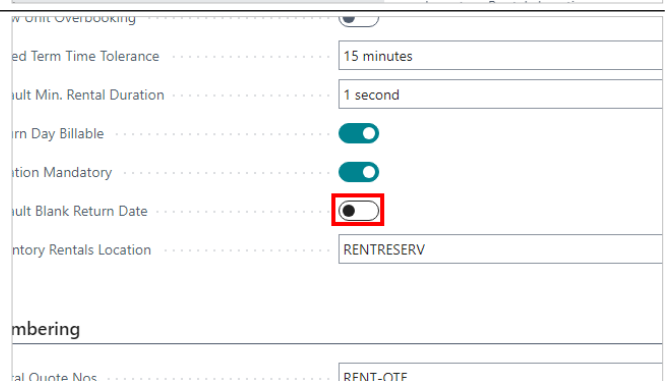
Click on the navigation menu item **Rental Management Setup**



Click on the action toggle **edit/view**



Click on the toggle field Default Blank Return Date



3.13.1.3. How to Process Contracts With a Blank Rental Return Date Profile - Sales Order Processor

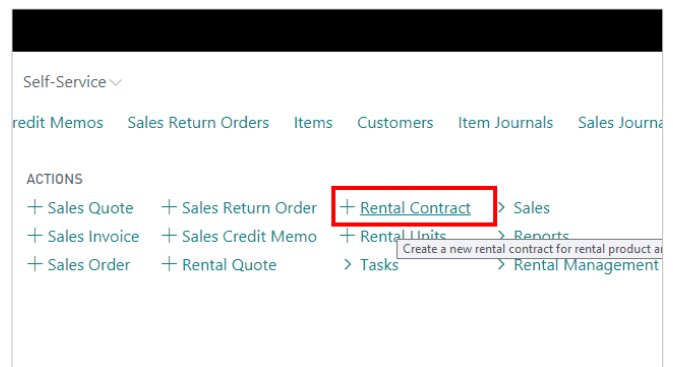
The following steps can as well be completed from the Business Manager Profile.

The following steps demonstrate the entry, shipping, and invoicing of lines on a Rental Contract, when the Rental Management Setup has the Default Blank Return Date checked.

NOTE

The command bars have been pinned on the contract and on the Rental Lines to enable the visibility and ease of selection on the menu options.

Click on the navigation menu item **Rental Contract**





Click on the field **Sell-to Customer Name**

The screenshot shows the 'Proforma' form with a tabbed interface. The 'Rental' tab is active. The 'Sell-to Customer Name' field is highlighted with a red box. Other fields like 'Rent', 'Dep', 'Cor', and 'Out' are visible on the right side of the form.

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

The screenshot shows the 'General' form with the 'Sell-to Customer Name' dropdown menu open. The option '10000' is highlighted in the list, and 'Adatum Corporation' is highlighted in the table below it. The table has columns for 'NO.', 'NAME', and 'CI'.

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Click on the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' table with the 'Rental Unit No.' cell highlighted. The table has columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'.

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Click on the lookup button in the cell **Rental Unit No.**
lookup button

The screenshot shows the 'Rental Lines' table with the 'Rental Unit No.' cell and the 'Look up value' button highlighted. The table has columns for 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'.

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION





ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00001**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	


Click on the cell **Rental Terms Code**

Either accept the defaulted Rental Term or lookup and select the applicable term.

Manage		More options		
 Delete Line		 Group Avail Matrix		
STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	
Manage				
UNIT OF				

Click on the cell **Rental Quantity**


More options


Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PEND	0		
UNIT OF				

Enter the text **2**.

More options


Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PEND	2		
UNIT OF				



Click on the cell **Location Code**

s						
vail Matrix						
ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-PEND	2				4/
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-PEND	2			4/9/2018
			CODE	NAME	
			EAST	East Warehouse	
			WEST	West Warehouse	
LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AMOUNT EX
	0		0.00	*	

Click on the cell **Rental Return Date**

Note that the Rental Return Date is blank as on Rental Management Setup the field, Default Blank Return Date was set to Yes.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	A
		4/9/2018		500.00	0.00	
LINE AMOUNT						

Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options	
New Line			Delete Line	Expand All	Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION			
RU00001		Buckeye Ditcher Group			
		Buckeye Ditcher Group			
		Buckeye Ditcher Group			



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines			Manage	More options
			New Line	Delete Line Expand All Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00001		Buckeye Ditcher Group		
		Buckeye Ditcher Group		
		Buckeye Ditcher Group		
			Look up value	
Sales Lines			Manage	More options

Click on the link in cell **No.** with the value **RU00002**

Edit View		
RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-008	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

New Line
 Delete Line
 Expand All
 Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
		Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00003**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

The following demonstrates the initial Rental Amount Lines for one of the rental units.

Note that although the rental will be ongoing for an undetermined length, the Rental Amount Lines show expected billing for only the first rental period.

Click on the navigation menu item **More options**

Quote No.




Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#)

More options

 New Line  Delete Line 

Reveal secondary actions

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/9/2018




Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#)

Line

 Functions Less options

 New Line  Delete Line  Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item **Rental Amount Lines**

RU00001	Buckeye Ditcher Group	MONTH-PPMT
Posting Date	4/9/2018	
Order Date	4/9/2018	
Document Date	4/9/2018	
<div> <div> <div>←</div> </div> </div>		
Rental Lines	Manage Line	Functions Less
<div> <div></div> <div>Rental Amount Lines</div> </div>	<div> <div></div> <div>Rental Ledger Entries</div> </div>	<div> <div></div> <div>Rental</div> </div>
View the rental amount line records that will be billed for the sel		
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **5/8/2018**

The Billing Date provides users with the expected invoicing date for the rental for the dates displayed in the Rental Amount Lines.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
1.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	

Close

Close

The following demonstrates the shipping and invoicing of the first rental period, followed by a review of the Rental Amount Lines.

Click on the navigation menu item popup **Rental**

Dynamics 365
Business Central
Rental Contract · RC00023

← RENTAL CONTRACT

Rental Contract · RC00023

Process Contract **Rental** Actions Navigate

Print... Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Ship Rentals**

Dynamics 365
Business Central
Rental Contract · RC00023

← RENTAL CONTRACT

Rental Contract · RC00023

Process Contract Rental Actions Navigate

Ship Rentals Return Rentals Invoice Invo

General

Post the shipment of the rental units on the rental lines. A posted deli

Sell-to Customer Name Adatum Corporation

Quote No.



ODT Rentals Online Help

Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018		
1	EAST			4/9/2018		

Click on the button **OK**

ment Posted Successfully.

OK

AL ITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018		500.00
1	EAST			4/9/2018		500.00

Click on the field **Posting Date**

Return Rentals Invoice Invoice and Print Posted Deliveries Post

Adatum Corporation

4/9/2018

4/9/2018

4/9/2018

type the date in the format m/d/yyyy

Manage Line Functions Less options

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

corporation

External Document No.

Rental Terms Code

Deposit Amount

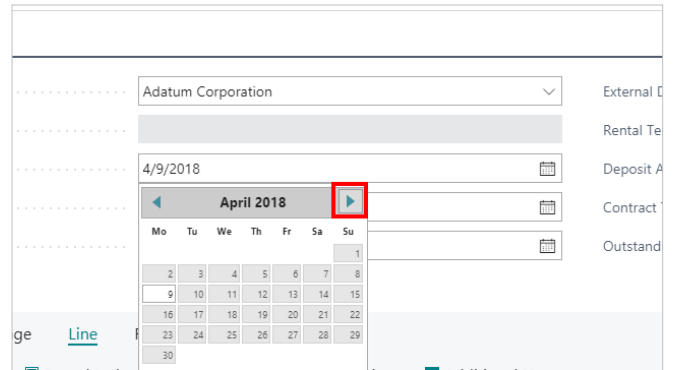
Select a date

Contract Total

Outstanding Amount

Less options

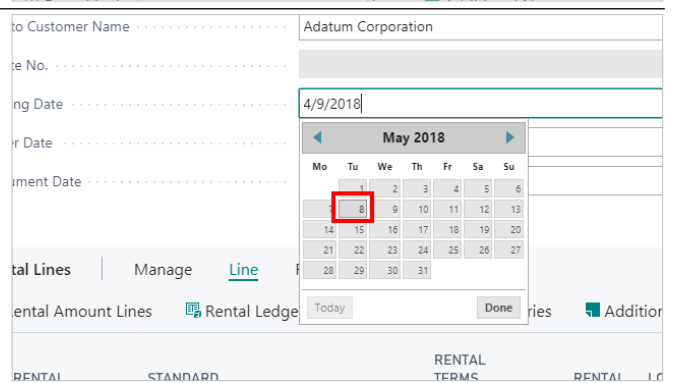
Click on the link **Next**



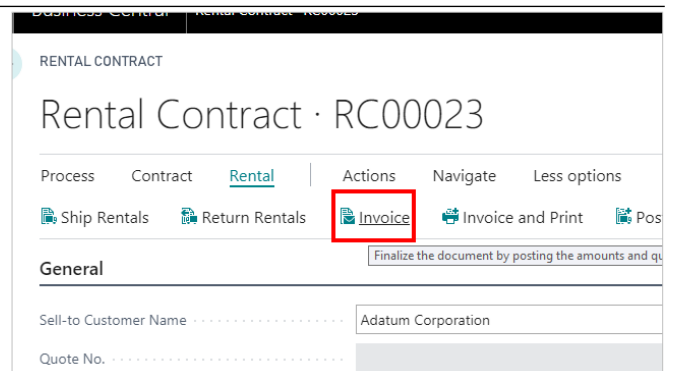
Click on a date in the calendar

Select the date that the invoice is for.

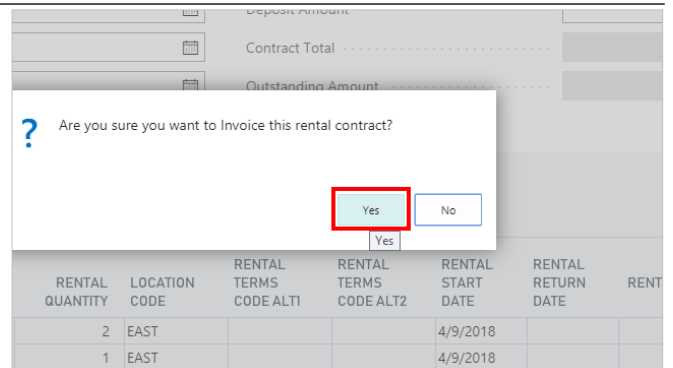
The date must be either equal to, or later than the Billing Date on the Rental Amount Lines for period being billed.



Click on the navigation menu item **Invoice**



Click on the button **Yes**





Click on the button **OK**

Message Posted Successfully.

OK

AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST			4/9/2018		500.00
1	EAST			4/9/2018		500.00

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/8/2018

Order Date 4/9/2018

Document Date 5/8/2018

Rental Lines | Manage **Line** | Functions | Less options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

RENTAL	STANDARD	DESCRIPTION	RENTAL
UNIT NO.	TEXT CODE		TERMS
			CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/8/2018

Order Date 4/9/2018

Document Date 5/8/2018

Rental Lines | Manage | **Line** | Functions | Less

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

View the rental amount line records that will be billed for the selected rental unit.

RENTAL	STANDARD	DESCRIPTION
UNIT NO.	TEXT CODE	
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **6/8/2018**

As the first rental period is invoiced, then new Rental Amount Lines are generated for the next rental period.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
51.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Close

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
1.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
0.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
1.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Close

3.13.1.4. Rental Reservations

When a unit has been entered on a quote with commit reservation checked or entered on a contract line, then the unit is reserved indefinitely.

The following demonstrates the Reservation Entry for one of the units from the contract, using the Group Availability Matrix.

Click on the cell **Rental Unit No.**

<

Rental Lines | Manage | Line | Functions | Less

Rental Amount Lines | Rental Ledger Entries | Rental

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00003	:	Buckeye Ditcher

Click on the navigation menu item popup **Manage**

<

Quote No.:
Posting Date: 5/8/2018
Order Date: 4/9/2018
Document Date: 5/8/2018

Rental Lines | **Manage** | Line | Functions | Less op

Rental Amount Lines | Rental Ledger Entries | Rental

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	REN	TER	CO
RU00001	:	Buckeye Ditcher Group			

Click on the navigation menu item **Group Avail Matrix**

Posting Date: 5/8/2018
Order Date: 4/9/2018
Document Date: 5/8/2018

Rental Lines | Manage | Line | Functions | Less options

New Line | Delete Line | **Group Avail Matrix**

View the Group Availability Matrix page

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001	:	Buckeye Ditcher Group	MONTH-PEND
RU00002	:	Buckeye Ditcher	MONTH-PEND



Click on the field **Reserved**

Buckeye Ditcher Group									
									6
									4
									2
18	04 19	04 20	04 21	04 22	04 23	04 24	04 25	04 26	04 27
18	18	18	18	18	18	18	18	18	1
4	4	4	4	4	4	4	4	4	4

Click on the cell **Ending Date-Time**

The Ending Date-Time field on the Reservation Entry will be blank when the Rental Return Date is blank.

The Reservation Entry will be updated when the Rental Return Date is entered on the rental line to display the new Ending Date-Time for the unit.

SOURCE REF. NO. 2	QUANTITY	STARTING DATE-TIME ▼	ENDING DATE-TIME ▼	NEEDED DURATION	LOCATION CODE
20000	1	4/9/2018 12:00 AM			EAST
30000	1	4/9/2018 12:00 AM			EAST

3.13.1.5.

Returning Units With a Blank Rental Return Date

When the unit(s) are being returned, or if preferred, when the expected return date becomes known, then users can populate the Rental Return Date.

Then complete the processing of the contract as per usual.

Click on the cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		4/9/2018		500.00	0.00	
		4/9/2018		500.00	0.00	
		4/9/2018		500.00	0.00	

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		4/9/2018		500.00	0.00	
		4/9/2018		500.00	0.00	
		4/9/2018		500.00	0.00	



Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
4/9/2018		500.00	0.00	0.00	
4/9/2018		0.00	0.00	0.00	
4/9/2018		0.00	0.00	0.00	

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018		500.00	0.00	0.00	
	4/9/2018		0.00	0.00	0.00	
	4/9/2018		0.00	0.00	0.00	

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Today Done

LINE	AMOUNT	INCLUDING	LINE	QUANTITY
TAX GROUP	EXCL. TAX	TAX	DISCOUNT	CHANGED

Click on the cell **Rental Unit No.**

Rental Lines

[Manage](#) [Line](#) [Functions](#) [Less](#)

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher

Sales Lines [Manage](#)

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/8/2018

Order Date 4/9/2018

Document Date 5/8/2018

Rental Lines [Manage](#) [Line](#) [Functions](#) [Less options](#)

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND



Click on the navigation menu item **Rental Amount Lines**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **6/1/2018**

When the Rental Return Date is entered, then the Rental Amount line(s) for the unit will be updated to reflect the billing based on that date.

In this example, the Billing Date changed from 6/8/2018 to 6/1/2018, the date entered in the Rental Return Date.

The Ending Date-Time field as well is updated to display the applicable date and time that the contract is expected to end.

When the rental term entered on the Rental Line is for Optimized or Prorated pricing, and the Rental Return Date results in a partial period, then the Rental Amount lines will be optimized or prorated in the billing records in the Rental Amount Lines.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
51.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
510.00	SUPPLIES	6/1/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/1/2018	<input type="checkbox"/>	

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
1.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00027
0.00	SUPPLIES	6/1/2018	<input type="checkbox"/>	
1.00	SUPPLIES	6/1/2018	<input type="checkbox"/>	

2,244.00

Close

Click on the cell **Qty. to Return**

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	0	0	0	0
0.00	0	1	0	0	0
0.00	0	1	0	0	0



ODT Rentals Online Help

Enter the text 1.

Should a user attempt to enter a Qty. to Return without populating the Rental Return Date, then an error message will advise the user they must enter a Rental Return Date first.

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
0.00	0	0	0	0	0	
0.00	0	1		0	0	
0.00	0	1	0	0	0	

Click on the cell Qty. to Return

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
0.00	0	0	0	0	0	
0.00	0	1		0	0	
0.00	0	1	0	0	0	

Enter the text 1.

Additional Notes						
ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	
0.00	0	0	0	0	0	
0.00	0	1	1	0	0	
0.00	0	1		0	0	

Click on the field Posting Date

Return Rentals

Invoice

Invoice and Print

Posted Deliveries

Post

Adatum Corporation

5/8/2018

4/9/2018

5/8/2018

Type the date in the format M/d/yyyy

Manage

Line

Functions

Less options



ODT Rentals Online Help

Click on the link

Invoice and Print

Posted Deliveries

Posted Returns

Posted Invoice

corporation

External Document No.

Rental Terms Code

Deposit Amount

Select a date

Contract Total

Outstanding Amount

Less options

Click on the link **Next**

Adatum Corporation

External C

Rental Te

Deposit A

Contract

Outstand

5/8/2018

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

ge [Line](#)

Click on a date in the calendar

Adatum Corporation

5/8/2018

June 2018

Mo Tu We Th Fr Sa Su

1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Manage [Line](#)

t Lines Rental Ledger Today Done ries Additional Notes

RENTAL RENTAL

Click on the navigation menu item popup **Rental**

amics 365 Business Central Rental Contract · RC00023

← RENTAL CONTRACT

Rental Contract · RC00023

Process Contract **Rental** Actions Navigate Les

Ship Rentals Return Rentals Invoice Invoice and I

General

Sell-to Customer Name Adatum Corporation



Click on the navigation menu item **Return Rentals**

The screenshot shows the 'RENTAL CONTRACT' screen for contract RC00023. The 'Return Rentals' button is highlighted with a red box. Below the button, there is a 'General' section with fields for 'Sell-to Customer Name' (Adatum Corporation) and 'Quote No.'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Return this rental contract?'. The 'Yes' button is highlighted with a red box. Below the dialog box, there is a table with columns: ALT2 RENTAL UNIT PRICE, QTY. TO RENT, QTY. ON RENT, QTY. TO RETURN, QTY. RETURNED, and LINE DISCOUNT%.

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT%
0.00	0	0	0	0	
0.00	0	1	1	0	

Click on the button **OK**

The screenshot shows a success dialog box with the text 'Contract Posted Successfully.'. The 'OK' button is highlighted with a red box. Below the dialog box, there is a table with columns: RENTAL PRICE, QTY. TO RENT, QTY. ON RENT, QTY. TO RETURN, QTY. RETURNED, LINE DISCOUNT%, and RE... DAY BIL....

RENTAL PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT%	RE... DAY BIL...
0.00	0	0	0	0	0	
0.00	0	1	1	0	0	

3.14.Batch Invoicing Rental Contracts

3.14.1. How to Batch Invoice Rental Contracts

3.14.1.1. Overview

The Rental Invoicing Worksheet provides the ability to process multiple invoices as of a billing cut-off date, without having to go into each individual Rental Contract and invoicing it separately. In addition, a function is provided to automatically extend Rental Contracts, when the units have not been returned as of the cut-off date.

Rental Invoicing Worksheet | Work Date: 6/11/2021

Batch Name

DEFAULT

Manage

Process

History

Open in Excel

More options

	Document No.	Sell-to Customer No.	Sell-to Customer Name	Posting Date	Invoice Amount	Invoice Amount Incl. Tax	Ready to Invoice	Error Message
→					0.00	0.00	<div></div>	

Users can review the rental and sales lines for a chosen record by selecting Process, then Rental Contracts in the command bar menu, at the top of the screen.

Proforma Invoices (pre-posting invoices) can be sent to PDF, printed, or previewed for a single or multiple records in the worksheet, prior to posting the invoices.

The user can then, either Post the planned invoices, Post and Print Invoices or Post and Send Invoices from the command bar options in the Worksheet.

These are described in the chapter, Command Bar Menu Options. Deleting a rental contract line from the records in the worksheet will not delete the actual contract.

When Metered Usage pricing is used, the entry of the Current Meter Reading or Metered Usage Qty. must be entered from the contract.

Should the entry for metered usage not be done, and the Allow Zero Usage not be checked, then when suggesting contracts the error, Zero Usage is not allowed, will populate the Error field.

Either the usage must be entered, or the Allow Zero Usage field must be checked on the contract line or lines, then the Validate must be ran, which will clear the error message, recalculate the amount fields and check the Ready to Invoice field. Then the invoice can be posted from the worksheet.

The above message will also occur should the Cut-off Date be after the Rental Return Date on a contract that has Metered Usage pricing, which has been invoiced up to the Rental Return Date.

When Periodic Usage pricing is used, the updating of the Rental Periodic Usage Calendar specifying the days that are to be billed for Periodic Usage, and if applicable, Standby Charges must be completed from the contract.

Should the calendar not be updated, and the Allow Zero Usage not be checked, then when suggesting contracts the error, Zero Usage is not allowed, will populate the Error field.

Either the calendar must be updated, or the Allow Zero Usage field must be checked on the contract line or lines, then the Validate must be ran, which will clear the error message, recalculate the amount fields and check the Ready to Invoice field.

Then the invoice can be posted from the worksheet.

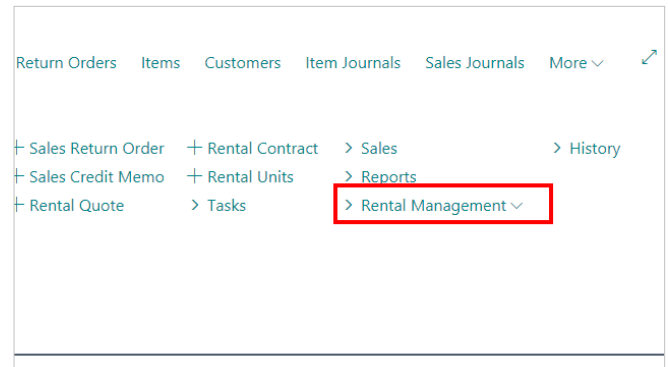
The above message will also occur should the Cut-off Date be after the Rental Return Date on a contract that has Periodic Usage pricing, which has been invoiced up to the Rental Return Date.

3.14.1.2. How to Access the Rental Invoicing Worksheet

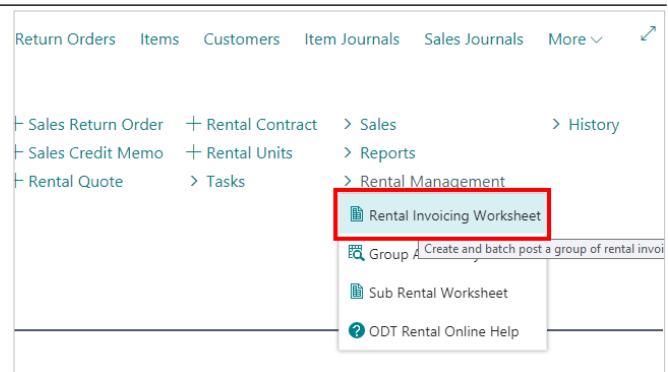
Profile - Sales Order Processor

The same steps to access the Rental Invoicing Worksheet can be used in the Business Manager Profile.

Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Invoicing Worksheet**



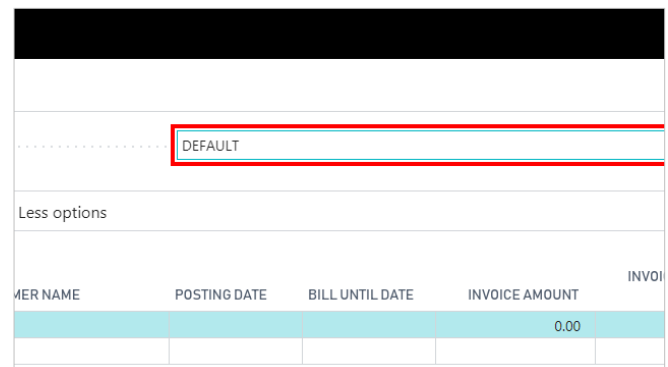
3.14.1.3. Rental Invoicing Worksheet Fields

To see a brief description of any field or menu option, point to the caption or option with your mouse.

Click on the field **Batch Name**

Specifies the batch name of the rental invoicing worksheet.

A new batch can be created directly from the Rental Invoicing Worksheet by clicking on the box to the right of the name and selecting New in the window that opens.



Below is a table describing the Worksheet Line fields that are displayed by default.

Worksheet Line Fields	
Name	Description
Document No.	Specifies the number of the Rental Contract for which the line is related to.
Sell-to Customer No.	Specifies the number of the customer who received the rental units and is to be billed by default.
Sell-to Customer Name	Specifies the name of the customer.
Posting Date	Specifies the date when the posting of the invoices will be recorded in the ledger entries.
Invoice Amount	Specifies the total amount to be invoiced excluding tax for the selected record.
Invoice Amount Incl. Tax	Specifies the total amount to be invoiced including tax for the selected record.
Ready to Invoice	Specifies the contract is ready to be invoiced when checked. When not checked, an error message is displayed advising why the contract is not ready to be invoiced.
Error Message	Specifies why the contract is not ready to be invoiced. For example, "Posting Date is later than Return Date on one or more lines". This message in essence, is stating the units have not been returned as of the date entered in the Posting Date field when running the Suggest Contracts and the date is later than the Rental Return Date on the contract rental lines.

Additional data columns are available for selection using the Personalize feature in Dynamics 365 Business Central. These include Bill Until Date, Bill-to City, Bill-to Contact, External Document No., Bill-to Customer No., Bill-to Name and Salesperson.

All these fields are populated by running the "Suggest Contracts" functions. These lines can also be created manually by selecting the values in each field; however it is recommended the "Suggest line" function be used.

3.14.1.4. Command Bar Menu Options

The Rental Invoicing Worksheet Command Bar options are displayed below.


RENTAL INVOICING WORKSHEET

Batch Name

Manage
Process
History
|
Actions
Navigate
Less options

The options available in the command bar Manage option are described below.

Command Bar - Manage options	
Name	Description
Delete	Deletes the selected record(s) from the worksheet. NOTE: Deleting the lines in the worksheet does not delete the rental lines on the contracts.

The options available in the command bar Process option are described below.

Command Bar -Process options	
Name	Description
Suggest Contracts	The running of the Suggest Contracts populates the rental invoicing worksheet with contract rental lines available to be invoiced based on the dates entered on the suggest contracts request page.
Validate Lines	Automatically extends the rental return date and updates the posting date on the selected contracts The automatic extension is applicable for error message which states that the Posting Date is later than Return Date on one or more lines.
Print Proforma	The Proforma Invoice is a per-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.
Post Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books.
Rental Contract	Opens the Rental Contract for the selected record in the worksheet lines.
Post and Print Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books and prints the invoices.
Post and Send Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books and prepares to send the invoices according to the Customer's Document Sending Profile.

The options available in the command bar History option are described below.

Command Bar - History options	
Name	Description
Postd Deliveries	View the history of posted deliveries that have been posted for the rental contract selected on the worksheet lines.
Posted Returns	View the history of posted returns that have been posted for the rental contract record selected in the worksheet lines.
Posted Invoices	View the history of posted sales invoices that have been posted for the rental contract record selected in the worksheet lines.

The options available in the command bar Actions, Functions menu option are described below.

Command Bar -Actions -Functions options	
Name	Description
Suggest Contracts	The running of the Suggest Contracts populates the rental invoicing worksheet with contract rental lines available to be invoiced based on the dates entered on the suggest contracts request page.
Validate Lines	Automatically extends the rental return date and updates the posting date on the selected contracts The automatic extension is applicable for error message which states that the Posting Date is later than Return Date on one or more lines.
Print Proforma	The Proforma Invoice is a per-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.

The options available in the command bar Actions - Posting option are described below.

Command Bar -Actions - Posting options	
Name	Description
Post Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books.
Post and Print Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books and prints the invoices.
Post and Send Invoices	Finalizes the documents by posting the amounts and quantities to the related accounts in your company books and prepares to send the invoices according to the Customer's Document Sendng Profile.

The options available in the command bar Related, Line menu option are described below.

Command Bar -Related- Line options	
Name	Description
Rental Contract	Opens the Rental Contract for the selected record in the worksheet lines.
Postd Deliveries	View the history of posted deliveries that have been posted for the rental contract selected on the worksheet lines.
Posted Returns	View the history of posted returns that have been posted for the rental contract record selected in the worksheet lines.
Posted Invoices	View the history of posted sales invoices that have been posted for the rental contract record selected in the worksheet lines.
Rental Ledger Entries	View the history of posted returns that have been posted for the rental contract record selected in the worksheet lines.
Rental Value Entries	View the history of posted returns that have been posted for the rental contract record selected in the worksheet lines.

3.14.1.5. Suggesting Contracts Overview

The Suggest Contracts is a helpful tool located in the command bar options of Process and Actions - Functions.

This tool gathers all Rental and Sales Lines amounts on every Rental Contract that is due for Invoicing. A single record per contract is created in the Rental Invoicing Worksheet with the total amount that is due for invoicing.

With Suggest Contract you can modify, delete (if you choose to post the Invoice later), and post your contracts. This tool works in a similar fashion as the Suggested Vendor Payments found in the Accounts Payable department, Payment Journal.

ODT Rentals provides the ability to invoice earlier than the Billing Date on the Rental Amount Lines.

Please review the help document, How to Batch Invoice Rentals Contracts with Early Billing located on ODT Rentals Online help in Additional Rental Processes, Batch Invoicing Rental Contracts.

The Suggest Contracts provides the ability for rental units to be billed before the Billing Date in the Rental Amount Lines using the Bill Until Date.

To learn about the Bill Until Date feature, see the help in Processing Rentals, Rental Contracts. Information can be found in the Rental Contract Overview and in the How to Process Invoices using Bill Until Date.

IMPORTANT NOTES:

- When a Rental Contract contains Sales Lines which have the Quantity to Invoice populated, these will be brought into the worksheet at all times. The dates used in the Suggest Contracts does not filter the Sales Lines based on the dates at this time. If the Sales Line(s) are not to be invoiced for the dates entered in the Posting Date, then the Quantity to Invoice field must be cleared on the Sales Line(s).
- Rentals that are based on Hybrid Hourly Rental Terms, will not be brought into the Rental Invoicing Worksheet. The Hybrid Hourly rentals is based on short term, hourly rentals. These types of contracts must be invoiced individually from the Rental Contracts.
- In a future release, the ability to filter on the Rental Contract Header fields will be added to the Suggest

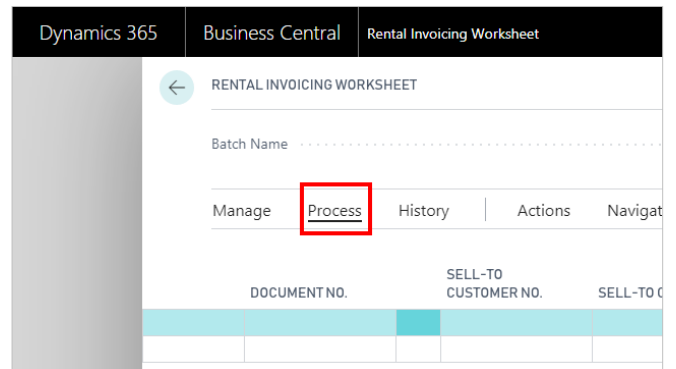
Contracts functionality.

3.14.1.6. Example 1 – Suggesting Contracts with Sales Lines

For this example, a contract exists that the rental lines first billing date is later than the Posting Date that will be entered on the Suggest Contracts page. Thus, no rentals are ready for invoicing until that date. However, the contract does have a Sales Line on it with the Quantity to Invoice populated.

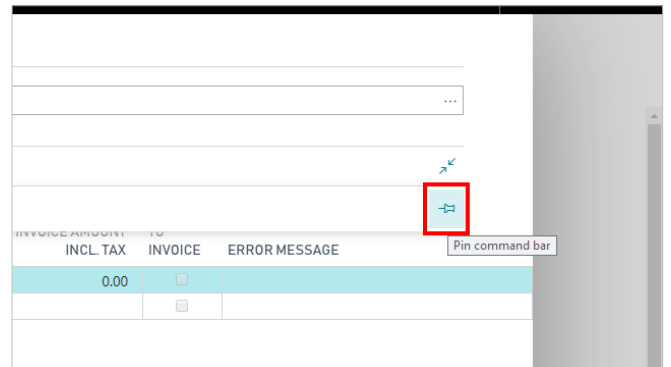
The pulling of Sales Line, where the clearing of the Quantity to Invoice was not done on a future contract is demonstrated as this is an item that users need to watch for. This also emphasizes the importance of reviewing the contracts pulled in to ensure that what will be invoiced is what should be invoiced.

Click on the navigation menu item popup **Process**

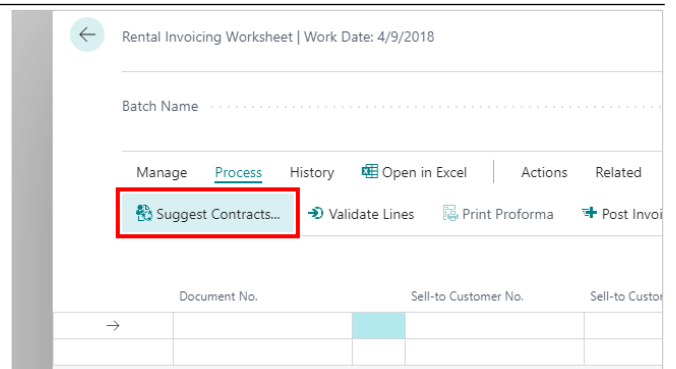


To have the sub-menu options show for each Command Bar option when they are clicked on, then pin the command bar using the following step.

Click on the button **Pin command bar**



Click on the navigation menu item **Suggest Contracts...**





ODT Rentals Online Help

Click on the field **Posting Date**

Enter or look up and select the date that invoicing is to occur up to.

Rental Invoicing Suggest Lines

Options

Posting Date 4/9/2018

Bill Until Date

Filter: Rental Contract Header

Click on the button **OK**

No. is:

Sell-to Customer No. is:

OK Cancel

Review the contract to verify if this contract should be invoiced.

Click on the cell **Document No.** with the value **RC00017**

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00017	10000	Adatum C

Click on the navigation menu item popup **Process**

Rental Invoicing Worksheet

Batch Name

Manage Process History Actions

Suggest Contracts... Validate Lines Print Profor

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00017	10000	Adatum C



Click on the navigation menu item **Rental Contract**

Worksheet

..... DEFAULT

ons Navigate Less options

Print Proforma Post Invoices... **Rental Contract** Post and Print Invoice

Opens the rental contract for the selected record

SELL-TO CUSTOMER NAME	POSTING DATE	BILL UNTIL DATE	INVOICE
Adatum Corporation	4/9/2018		

Click on the cell **Rental Unit No.** with the value **RU00002**

Select one of the unit rental lines.

Rental Lines Manage More options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00006	:	Buckeye Ditcher

Sales Lines Manage

Click on the navigation menu item **More options**

Quote No.:

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines Manage **More options**

New Line Delete Line Group Avail Matrix

Reveal secondary actions

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item popup **Line**

Quote No.:

Posting Date 4/9/2018

Order Date 4/9/2018

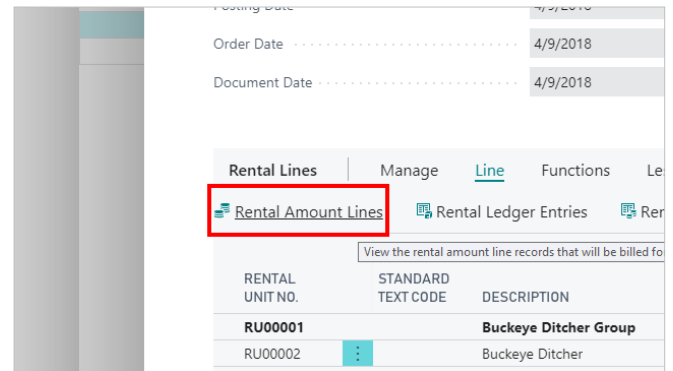
Document Date 4/9/2018

Rental Lines Manage **Line** Functions Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PEND

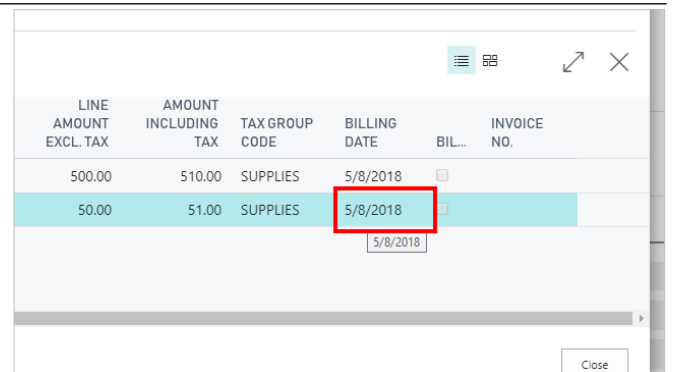
Click on the navigation menu item **Rental Amount Lines**



The screenshot shows the 'Rental Amount Lines' menu item highlighted with a red box. The menu is part of a larger interface with tabs for 'Rental Lines', 'Manage', 'Line', and 'Functions'. Below the menu, there is a table with columns: RENTAL UNIT NO., STANDARD TEXT CODE, and DESCRIPTION. The table contains two rows: 'RU00001' with 'Buckeye Ditcher Group' and 'RU00002' with 'Buckeye Ditcher'.

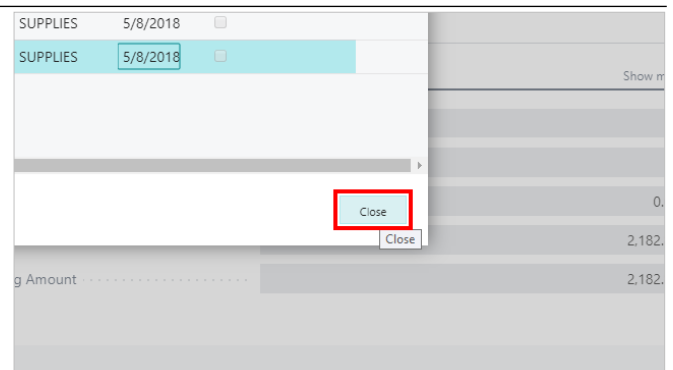
Click on the cell **Billing Date** with the value **5/8/2018**

Note that the Billing Date is later than the date entered on the Suggest Contracts page.



LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILL NO.	INVOICE NO.
500.00	510.00	SUPPLIES	5/8/2018		
50.00	51.00	SUPPLIES	5/8/2018		

Click on the button **Close**

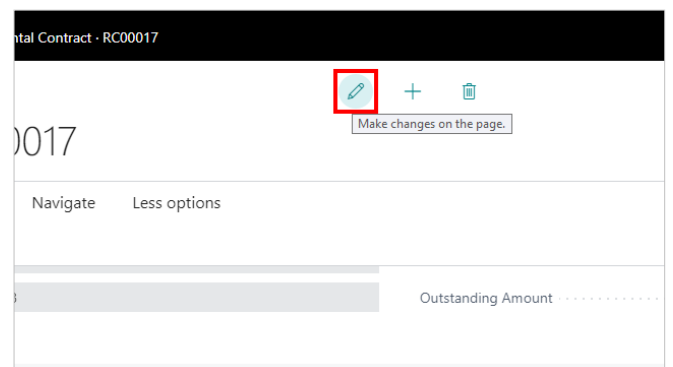


The screenshot shows a 'Close' button highlighted with a red box. The button is located at the bottom right of a table with columns: SUPPLIES, 5/8/2018, and a checkbox. The table contains two rows: 'SUPPLIES' with '5/8/2018' and a checkbox, and 'SUPPLIES' with '5/8/2018' and a checkbox.

When opening the Rental Contract from the Rental Invoicing Worksheet, the contract opens in read only mode.

To make changes to the contract complete the following steps.

Click on the button **Make changes on the page.**



The screenshot shows the 'Make changes on the page' button highlighted with a red box. The button is located at the top right of a form with a title bar 'Rental Contract - RC00017'. The form contains a table with columns: Navigate, Less options, and Outstanding Amount. The table contains one row: 'Navigate' with 'Less options' and 'Outstanding Amount'.

Click on the cell **Type** with the value **Item**

Sales Lines		Manage	
TYPE	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE
Item		1	PCS

Click on the cell **Qty. to Invoice** with the value **1**

Notice that the Sales Line has the Quantity to Invoice populated and the Amount Excl. Tax matches the amount in the worksheet for this contract.

LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED	QTY. TO INVOICE	QUANTITY INVOICED
0	1	0	1	0

A decision is needed as to whether or not to invoice the Sales Line ahead of invoicing the Rental Lines.

If the Sales Line is not to be invoiced, then the worksheet record is to be deleted from the worksheet.

If the Sales Line is to be invoiced, then the Proforma Invoice can be printed or previewed, and the contract(s) can be invoiced by selecting either Post Invoices or Post and Print Invoices.

For this example, the worksheet record for this contract will be deleted using the following steps.

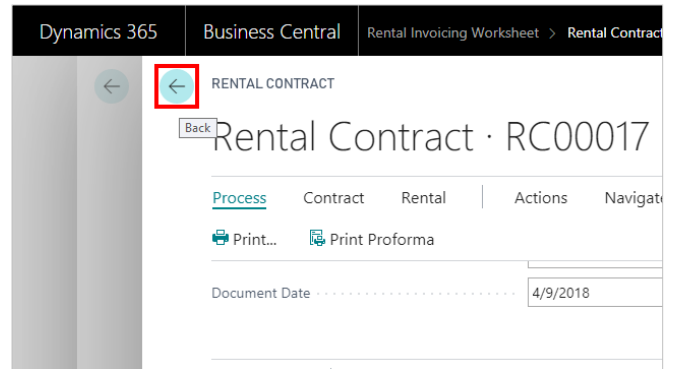
Click on the cell **Qty. to Invoice**

LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED	QTY. TO INVOICE	QUANTITY INVOICED
0	1	0	1	0

Enter the text **0**. Press the **Enter** key.

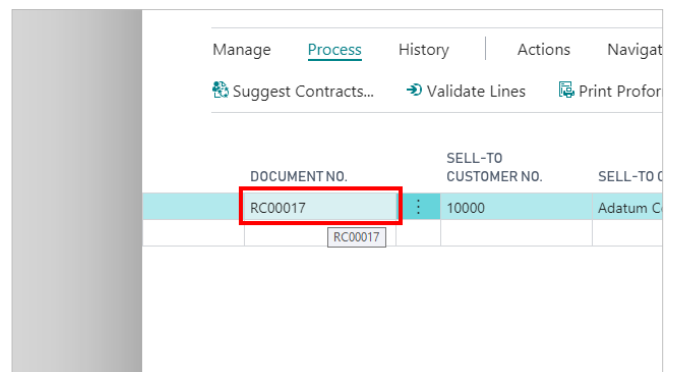
LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED	QTY. TO INVOICE	QUANTITY INVOICED
0	1	0	0	0

Click on the back button

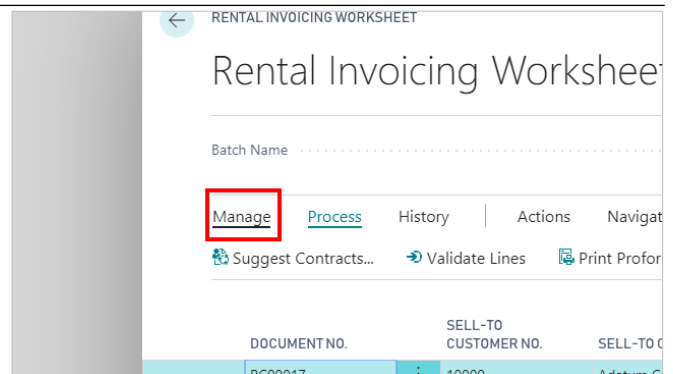


The following steps demonstrate how to delete records from the worksheet.

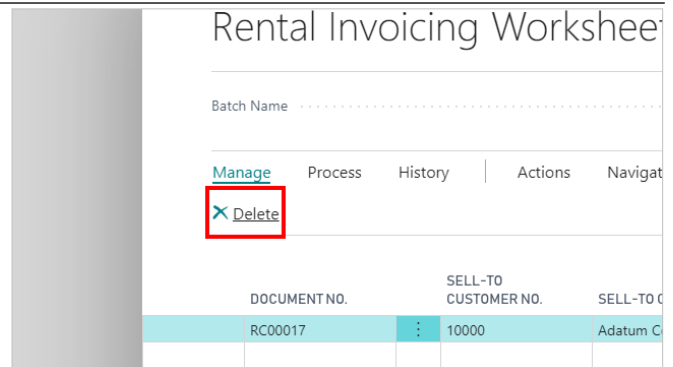
Click on the cell **Document No.** with the value **RC00017**



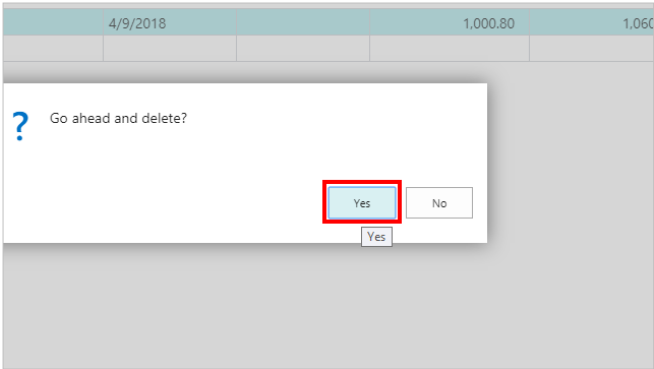
Click on the navigation menu item popup **Manage**



Click on the navigation menu item **Delete**



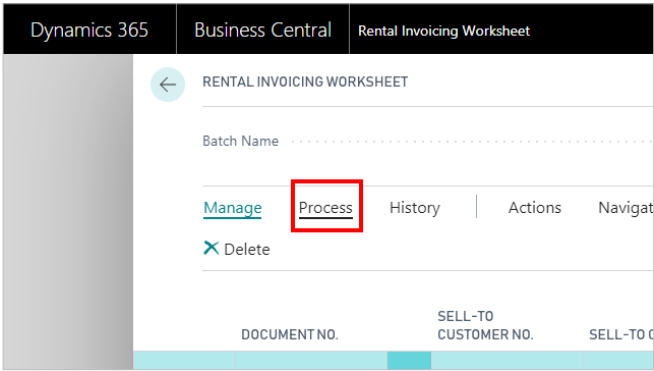
Click on the button **Yes**



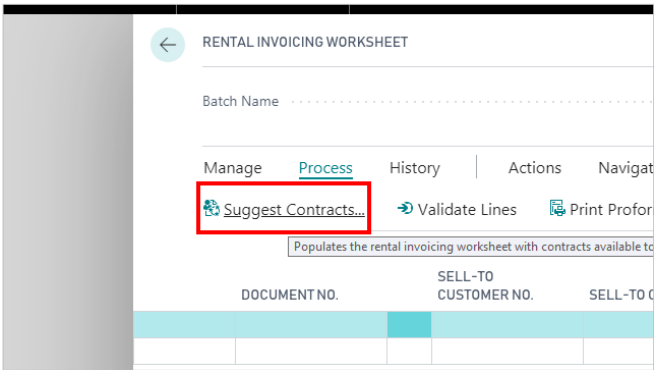
3.14.1.7. Example 2 - Extending Rental Contracts

In this example the steps demonstrate the steps to extend a rental contract when the units have not been returned on time and generates the error, "Posting Date is later than Return Date on one or more lines in the worksheet."

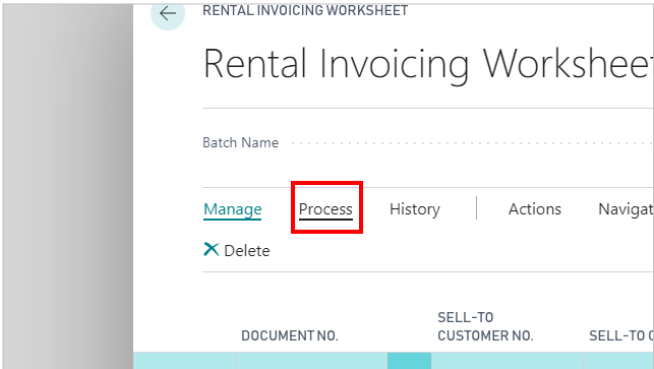
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Suggest Contracts...**



Click on the navigation menu item popup **Process**





Click on the navigation menu item **Suggest Contracts...**

Rental Invoicing Worksheet

Batch Name

Manage Process History Actions Navigat

Suggest Contracts... Validate Lines Print Profor

Populates the rental invoicing worksheet with contracts available to

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C

Click on the field **Posting Date**

The Work Date defaults to the Posting Date field, which is the desired date for this demonstration.

This date can be overridden to specify the date the posting is to occur on and will be the Posting Date on all posted entries.

Rental Invoicing Suggest Lines

Options Show less

Posting Date **4/9/2018**

Bill Until Date

Filter: Rental Contract Header

Click on the link

EST LINES

4/9/2018

Select a date

Click on the link **Next**

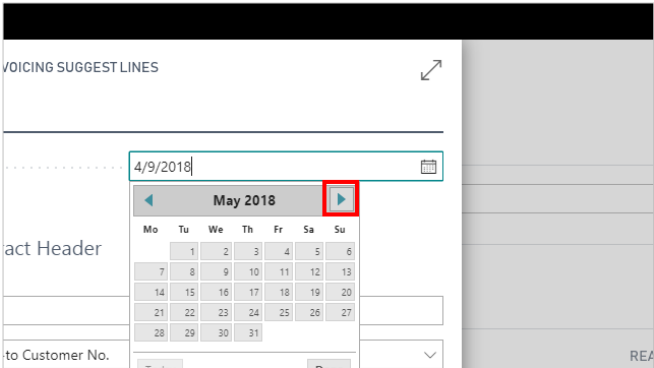
VOICING SUGGEST LINES

4/9/2018

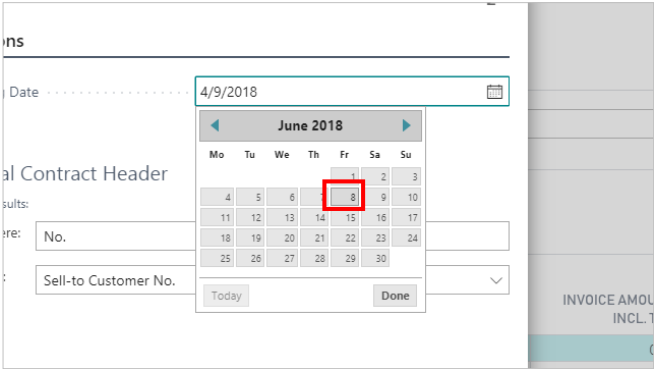
April 2018

Mo	Tu	We	Th	Fr	Sa	Next
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

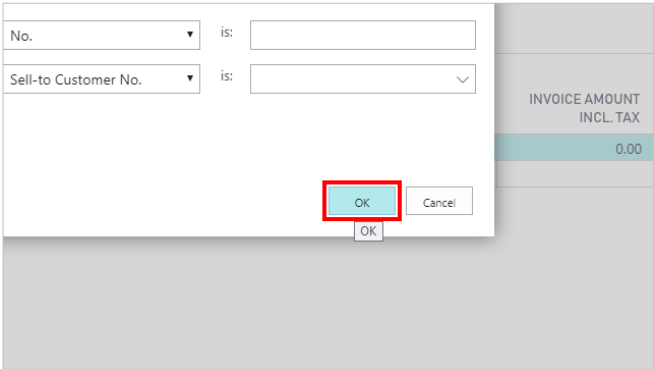
Click on the link **Next**



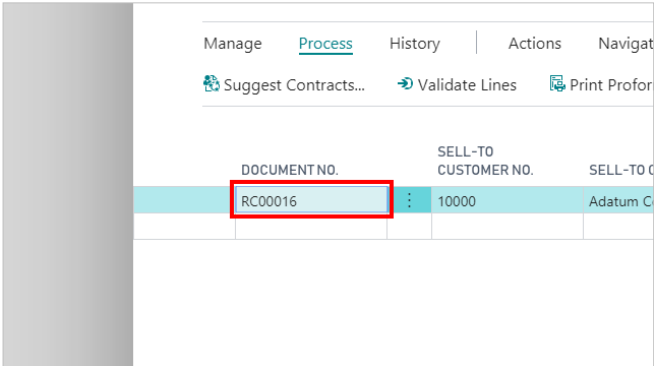
Click on a date in the calendar



Click on the button **OK**



Click on the cell **Document No.** with the value **RC00016**



Click on the cell **Error Message** with the value **Posting Date is later than Return Date on one or more lines.**

As the units were not returned and, on the contract, the Rental Return Date is later than the Posting Date used on the Suggest Contracts the error message is generated and the record is not flagged as Ready to Invoice.

INVOICE AMOUNT	INVOICE AMOUNT INCL. TAX	READY TO INVOICE	ERROR MESSAGE
0.00	0.00	<input type="checkbox"/>	Posting Date is later than Return Date on one or more lines.
		<input type="checkbox"/>	Posting Date is later than Return Date on one or more lines.

Review the contract using the Rental Contract option from the Process menu.

The following steps demonstrate extending the rental for the contract and subsequent review of the contract.

Click on the navigation menu item **Validate Lines**

Rental Invoicing Worksheet

Batch Name

Manage [Process](#) History Actions Navigate Less

[Suggest Contracts...](#) [Validate Lines](#) [Print Proforma](#)

Automatically extends the rental return date and updates the Posting Date is later than Return Date on one or more lines.

DOCUMENT NO.	CUSTOMER NO.	SELL-TO CUSTOMER
RC00016	10000	Adatum Corporation

Click on **Auto Extend**

Notice that the Auto Extend field is set to Yes.

EDIT - RENTAL INVOICING VALIDATE LINE

Auto Extend ☒

Rental Invoicing Header

Show results:

Where: Batch Name is: DEFAULT

And: Document Type is: Rental Contract

And: Document No. is: RC00016

Click on the button **OK**

And: Document Type is: Rental Contract

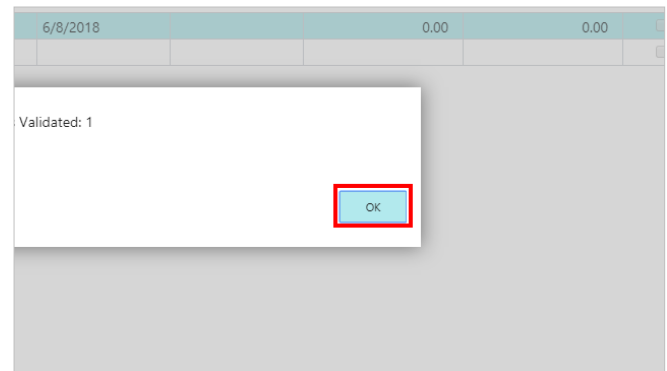
And: Document No. is: RC00016

OK Cancel

ODT Rentals Online Help

Click on the button **OK**

This message will advise how many worksheet records have been validated, which means extended.



Click on the cell **Ready to Invoice**

Notice that the field Ready to Invoice is now checked.

INVOICE AMOUNT	INVOICE AMOUNT INCL. TAX	READY TO INVOICE	ERROR MESSAGE
0.00	0.00	<input checked="" type="checkbox"/>	

Click on the cell **Error Message**

Notice that the Error Message field is now blank, indicating the reason for the error no longer exists for the contract.

INVOICE AMOUNT	INVOICE AMOUNT INCL. TAX	READY TO INVOICE	ERROR MESSAGE
0.00	0.00	<input checked="" type="checkbox"/>	

To verify what will be billed to the client for the Posting Date entered when suggesting contracts there are two options:

1. Print the Proforma Invoice
2. Review the contract, Rental Amount Lines to confirm the changes made to the contract. On the contract the Posting Date and Rental Return Date will be updated. New Rental Amount lines will be created for the next invoice to be posted.

The following demonstrates the printing of the Proforma Invoice from the worksheet.

The Proforma Invoice is a per-posting Invoice that prints what will be billed to the Customer, based on a Cut Off Date the user specifies.



ODT Rentals Online Help

Click on the cell **Document No.** with the value **RC00016**

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME
RC00016	10000	Adatum C

Click on the navigation menu item popup **Process**

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME
RC00016	10000	Adatum C

Click on the navigation menu item **Print Proforma**

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	PO
RC00016	10000	Adatum Corporation	6/8

For information on the fields, No. of Copies, Print Company Address and Show Alternative Prices, see the ODT Rentals Online help, Processing Rentals, Rental Contract documents.

Click on the field **Number of Copies**

Number of Copies: 0



ODT Rentals Online Help

Click on **Print Company Address, Yes**

Values from: Last used options and filters

Copies: 0

Print Company Address: ☒

Print Prices: ☒

Cut-off Date: 6/8/2018

Contract:

INVOICE AMOUNT
INCL. TAX
0.00

Click on **Show Alternate Prices, Yes**

Copies: 0

Print Company Address: ☒

Show Alternate Prices: ☒

Cut-off Date: 6/8/2018

Contract:

INVOICE AMOUNT
INCL. TAX
0.00

Click on the field **Cut-off Date**

The Cut-Off Date will contain the last date entered when running the Print Proforma from the worksheet or when running from a contract.

Copies: 0

Print Company Address: ☒

Print Prices: ☒

Cut-off Date: 6/8/2018

Contract:

No. is:

INVOICE AMOUNT
INCL. TAX
0.00

Click on the button **Preview**

Print to Customer No. is:

Print to Code is:

Send to... Print Preview Cancel

Preview

INVOICE AMOUNT
INCL. TAX
0.00

Below is an example of the Proforma Invoice for this contract.



CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Rental Proforma Invoice

Page: 1

Rental Contract Number: RC00016

Rental Proforma Date: 6/8/2018

Sell To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

P.O. Number

Customer ID 10000

SalesPerson Peter Saddow

Ship Via

Terms

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00004	Buckeye Ditcher	8D-004	1		550.00
Rental	May 09, 2018 to Jun 08, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	May 09, 2018 to Jun 08, 2018		1 @ 50.00/Month = 50.00		
				Subtotal:	550.00
Amount Subject to Sales Tax 550.00				Total Sales Tax	11.00
Amount Exempt from Sales Tax 0.00				Total:	561.00

The contract is now ready for invoicing from the Rental Invoicing Worksheet.

IMPORTANT

Rental Contract records for contracts that are not to be invoiced must be deleted from the worksheet.

ODT Rentals Online Help

5/15/2024

1080/2540

3.14.1.8. How to Invoice Multiple Contracts from the Worksheet

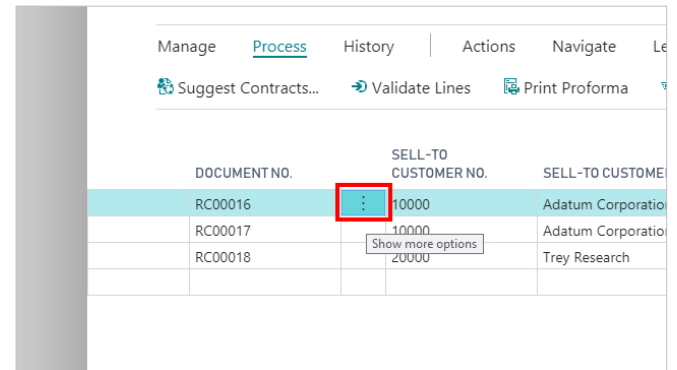
The following steps demonstrate how to select multiple lines in the worksheet.

This can be used to either select multiple records to be deleted.

NOTE:

Records for contracts which have the Ready to Invoice checked that are not to be invoiced must be deleted.

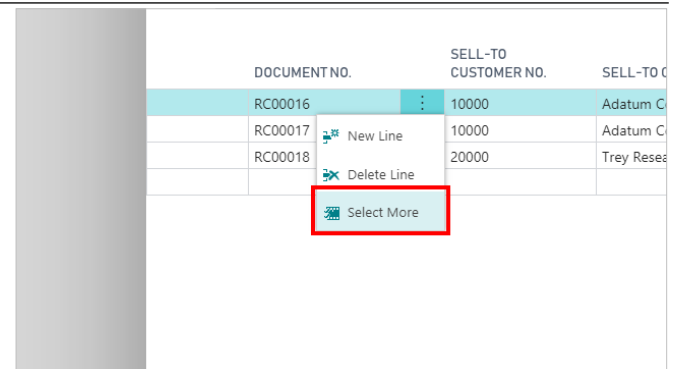
Click on the row menu button



DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00016	10000	Adatum Corporation
RC00017	10000	Adatum Corporation
RC00018	20000	Trey Research

Click on the menu item **Select More**

Click in the box to the left of the Document No. on each record required.



DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00016	10000	Adatum Corporation
RC00017	10000	Adatum Corporation
RC00018	20000	Trey Research

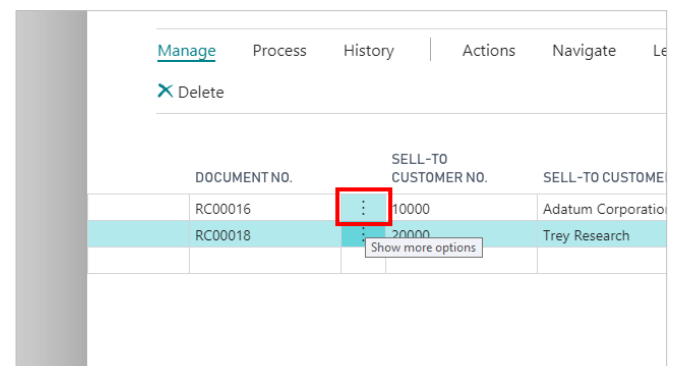
The following steps demonstrate how to select all lines in the worksheet.

This can be used to delete all records in the worksheet.

NOTE:

Records for contracts which have the Ready to Invoice checked that are not to be invoiced must be deleted.

Click on the row menu button



DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00016	10000	Adatum Corporation
RC00018	20000	Trey Research

Click on the menu item **Select More**

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00016	10000	Adatum C
RC00018	20000	Trey Rese

New Line
Delete Line
Select More

Click on the boolean box at the left of the Document
No field caption

Batch Name	
Manage	Process History Actions Navigat
Delete	
<input type="checkbox"/>	DOCUMENT NO.
<input checked="" type="checkbox"/>	RC00016
<input type="checkbox"/>	RC00018
	SELL-TO CUSTOMER NO.
	10000
	20000
	SELL-
	Adatu
	Trey R

Notice that all records in the worksheet are automatically selected.

After the records are selected, then the Manage - Delete option can be selected, which will delete only those records selected.

When all records in the worksheet are to be invoiced, then the Process options of Post Invoices or Post and Print Invoices can be ran which will include all records in the worksheet that have Ready to Invoice checked.

Currently to filter printing of the Proforma Invoice requires the manual entry of the Document Nos. in the No. field of the Print Proforma page.

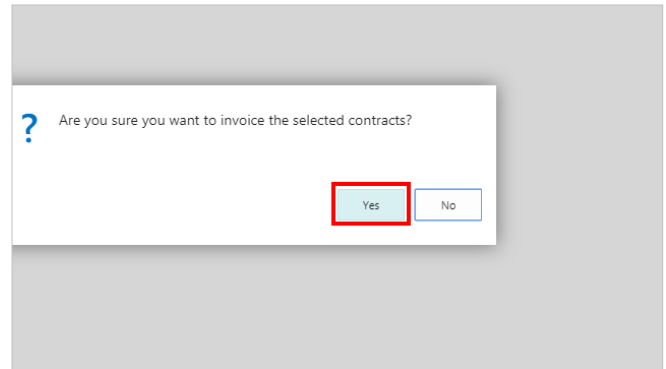
Click on the navigation menu item popup **Process**

Dynamics 365	Business Central	Rental Invoicing Worksheet
← RENTAL INVOICING WORKSHEET		
Batch Name		
Manage	Process	History Actions Navigat
Suggest Contracts... Validate Lines Print Profor		
DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00016	10000	Adatum C

Click on the navigation menu item **Post Invoices...**

IEET			
DEFAULT			
History	Actions	Navigate	Less options
Validate Lines	Print Proforma	Post Invoices...	Rental Contract
Finalize the document by posting the amounts an			
SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	POSTING DATE	BILL U
10000	Adatum Corporation	6/8/2018	

Click on the button **Yes**



3.14.2. How to Batch Invoice Rental Contracts with Early Billing

3.14.2.1. Overview

The following examples demonstrate the processing an initial invoice of a contract using a periodic start rental terms with the Early Billing Date Formula specified and displays the results.

These examples are based on a Rental Return Date being on the Rental Lines.

The same process applies to when the Rental Return Date is blank by default or blanked out on the line.

NOTE:

The posting date used on the first invoice with an early billing term cannot be earlier than the date used when posting the shipment of the units. Should a user attempt to do this, then an error will occur advising as such.

The processing in the examples has been done using the Sales Order Processor Profile.

The same steps apply to users having the Business Manager Profile.

3.14.2.2. How to Batch Invoice an Early Billing Contract with Rental Start Date and Ship Date the Same

When a Rental Contract has the units shipped on the date the rental commences (Rental Start Date), then the process is to post the first invoice from the contract and subsequent invoices from the Rental Invoicing Worksheet using the Early Billing Date feature.

The following example demonstrates this process.

The steps in the first example consist of the following:

- A contract will be created with an Order Date of June 7, using the monthly periodic start term that was setup with an Early Billing Date Formula of 5D (5 days) and will have a Rental Return Date of August 6.
- The shipping of the units will occur on June 7.
- The rental start date will be set to June 7, which is when the rental will commence.
- The first invoice will be generated and posted from the Rental Contract using a Posting Date of June 7.
- The second invoice will be generated from the Rental Invoicing Worksheet using a Posting Date of July 3.



Click on the navigation menu item **Rental Contract**

Self-Service

Credit Memos Sales Return Orders Items Customers Item Journals Sales Journals

ACTIONS

+ Sales Quote + Sales Return Order + **Rental Contract** > Sales

+ Sales Invoice + Sales Credit Memo + Rental Units > Reports

+ Sales Order + Rental Quote > Tasks > Rental Management

Create a new rental contract for rental product and

Click on the field **Sell-to Customer Name**

Rental Actions Navigate Less options

Proforma

Ext

Ren

Dep

Cor

Out

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Print... Print Proforma

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Current Date

NO.	NAME	CITY
10000	Adatum Corporation	Atlanta
20000	Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Rental Lines Manage More options + New

Click on the field **Rental Terms Code**

Show more

MONTH-PEND

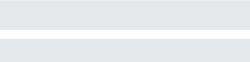
0.00

0.00

0.00

ODT Rentals Online Help

Click on the link



The screenshot shows the 'MONTH-PEND' dropdown menu. The 'Show more' button is highlighted with a red box. The button is located at the bottom right of the dropdown menu, next to the text '0,0 Look up value'.

Click on **Code = MONTH-START-EARLY,**
Description = Monthly Rental - Early Per. Billing in
Advance

MONTH-TERM		MONTH-TERM	
CODE	DESCRIPTION	CODE	DESCRIPTION
MONTH-END-OPT-...	Monthly Rental for C	MONTH-TERM	Monthly Rental - Per
MONTH-PEND-EARLY	Monthly Rental - Ear	MONTH-PEND-START	Monthly Rental - Per
MONTH-PSTART	Monthly Rental - Ear	MONTH-PSTART-EA...	Monthly Rental - Ear
MONTH-TERM	Monthly Rental for B	MONTH-TERM	Monthly Rental for B

+ New
Select record "MONTH-PSTART-EARLY"

ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
				0.00	0.00	0.00

Click on the cell **Rental Unit No.**

Rental Lines		Manage More options	
New Line	Delete Line	Expand All	Collaps
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	
<div style="border: 2px solid red; width: 150px; height: 25px;"></div>			

Sales Lines		Manage More options	
-------------	--	-------------------------------------	--

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines
Manage
More options

New Line
Delete Line
Expand All
Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
<input type="text"/> <div>...</div> <div>Look up value</div>		

Sales Lines
Manage
More options



Click on the cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		6/7/2018	7/6/2018	5,000.00	0.00	0.00
Type the date in the format M/d/yyyy						
LINE AMOUNT						

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		6/7/2018	7/6/2018	5,000.00	0.00	0.00
Select a date						
LINE AMOUNT						

Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
6/7/2018	7/6/2018	5,000.00	0.00	0.00	
July 2018					
Mo Tu We Th Fr Sa Su					
1					
2 3 4 5 6 7 8					
9 10 11 12 13 14 15					
16 17 18 19 20 21 22					
23 24 25 26 27 28 29					
30 31					
Next					
QUANTITY					

Click on a date in the calendar

Select August 6 as the Rental Return Date.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE
		6/7/2018	7/6/2018	5,000.00	0.00	0.00
August 2018						
Mo Tu We Th Fr Sa Su						
1 2 3 4 5						
6 7 8 9 10 11 12						
13 14 15 16 17 18 19						
20 21 22 23 24 25 26						
27 28 29 30 31						
Today Done						
UNIT PRICE EXCL. TAX	TAX GROUP CODE	LIN AMOUN EXCL. TA	QTY. TO SHI			
0.00	*	0.00	0.00	0		



Press the **Arrow down** key.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	A
		6/7/2018	3/6/2018	5,000.00	0.00	
UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHI	
0.00	*	0.00	0.00	0		

Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
New Line	Delete Line	Expand All	Collaps	
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RU00001	:	Buckeye Ditcher Group		
	:	Buckeye Ditcher Group		
	:	Buckeye Ditcher Group		

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines

Manage

More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
<div><div>...</div><div>⋮</div></div>		Buckeye Ditcher Group
	<div>Look up value</div>	Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00002**

Edit

View

RENTAL UNIT LIST + New

NO.		DESCRIPTION	GROUP
BD-006	:	Buckeye Ditcher	
RU00002	:	Buckeye Ditcher	
RU00003	:	Buckeye Ditcher	
RU00004	:	Buckeye Ditcher	
RU00005	:	Buckeye Ditcher	
RU00006	:	Buckeye Ditcher	
SUB BUCKEYE	:	Sub Buckeye Ditcher	



Click on the cell **Rental Unit No.**

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Click on the link in cell **No.** with the value **RU00003**

Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'RENTAL CONTRACT' page for 'Rental Contract · RC00019'. The 'Process' tab is active, and the 'Ship Rentals' button is highlighted with a red box. Below the button, there is a text box with the placeholder text 'Post the shipment of the rental units on the rental lines. A posted delivery'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. Below the dialog box, there is a table with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE. The table contains two rows of data.

Click on the button **OK**

The screenshot shows a success message dialog box with the text 'Shipment Posted Successfully.'. The 'OK' button is highlighted with a red box. Below the dialog box, there is a table with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE. The table contains two rows of data.

The following demonstrates the invoicing of the first invoice from the contract.

Reminder

The Posting Date cannot be earlier than the Posting Date used when shipping the units.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'RENTAL CONTRACT' page for 'Rental Contract · RC00019'. The 'Rental' button is highlighted with a red box. Below the button, there is a text box with the placeholder text 'Post the shipment of the rental units on the rental lines. A posted delivery'.



Click on the navigation menu item **Invoice**

RENTAL CONTRACT

Rental Contract · RC00019

Process Contract Rental Actions Navigate Less options

Ship Rentals Return Rentals **Invoice** Invoice and Print Pos

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

Contract Total
Outstanding Amount

? Are you sure you want to Invoice this rental contract?

Yes No

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			6/7/2018	8/6/2018	
1	EAST			6/7/2018	8/6/2018	

Click on the button **OK**

Contract Total
Outstanding Amount

ce Posted Successfully.

OK

AL ITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			6/7/2018	8/6/2018	5,000.00
1	EAST			6/7/2018	8/6/2018	5,000.00

The following demonstrates the reviewing of the Rental Amount Lines, Billing Date, for one of the child units.

Click on the cell **Rental Unit No.**

Rental Lines Manage Line Functions Less

Rental Amount Lines Rental Ledger Entries Ren

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00003	:	Buckeye Ditcher

Sales Lines Manage



ODT Rentals Online Help

Click on the navigation menu item **More options**

Quote No.

Posting Date 6/7/2018

Order Date 6/7/2018

Document Date 6/7/2018

Rental Lines | [Manage](#) | **More options**

New Line Delete Line Group Reveal secondary actions

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 6/7/2018

Order Date 6/7/2018

Document Date 6/7/2018

Rental Lines | [Manage](#) | **Line** | Functions | Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

Click on the navigation menu item **Rental Amount Lines**

Posting Date 6/7/2018

Order Date 6/7/2018

Document Date 6/7/2018

Rental Lines | [Manage](#) | [Line](#) | Functions | Less

Rental Amount Lines Rental Ledger Entries Rental

View the rental amount line records that will be billed for the s

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Billing Date** with the value **7/7/2018**

Note that the Billing Date is July 7.
The Billing Date is not modified by the Early Billing Date Formula as this date has many other purposed in the rentals.
The user must determine the earliest allowed invoicing date.

For Early Billing of this invoice, where the Early Billing Date is 5D, the earliest Posting Date that can be used is July 3.

AMOUNT INCLUDING TAX TAX GROUP CODE BILLING DATE BILLED INVOICE NO.

5,100.00	SUPPLIES	6/7/2018	<input checked="" type="checkbox"/>	RI00022
5,100.00	SUPPLIES	7/7/2018	<input type="checkbox"/>	

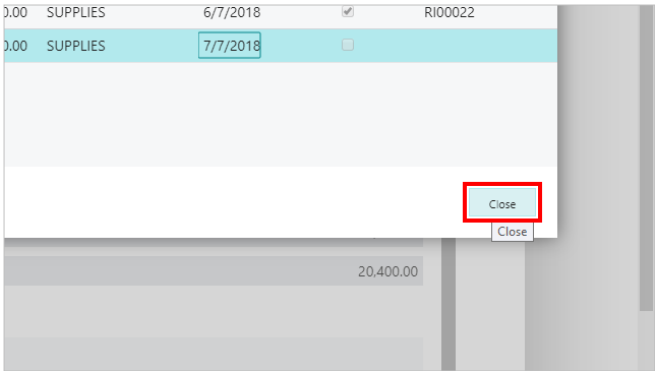
7/7/2018

Close



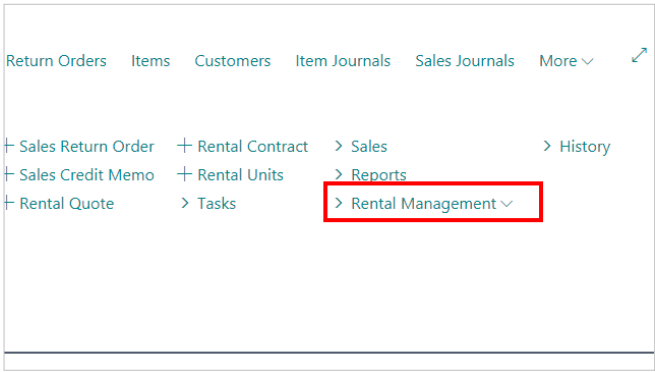
ODT Rentals Online Help

Click on the button **Close**

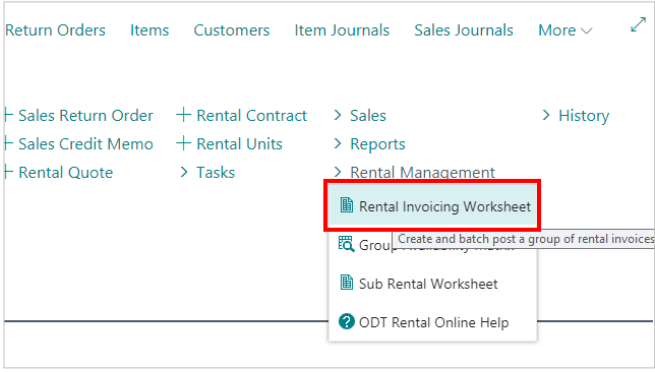


The following demonstrates the invoicing of the second invoice early from the Rental Invoicing Worksheet, using the earliest allowed date of July 1.

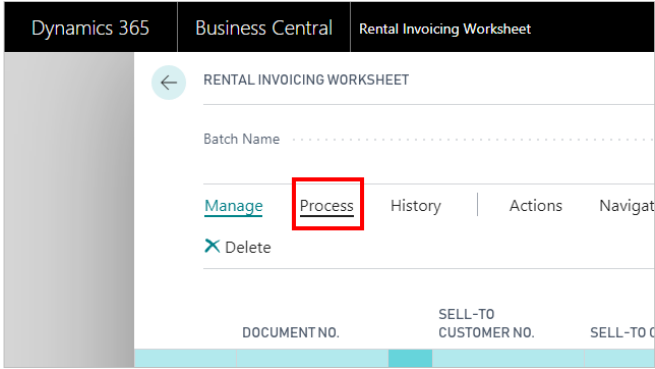
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Invoicing Worksheet**



Click on the navigation menu item popup **Process**





Click on the navigation menu item **Suggest Contracts...**

Click on the field **Posting Date**

Either enter or lookup and select July 3 in the calendar.

Click on the link

Click on the link **Next**



Click on a date in the calendar

Select July 3 on the calendar, if using the lookup.

Click on the button **OK**

Click on the cell **Posting Date** with the value **7/3/2018**

Note that the Posting Date on the record is the same as the Cut-off Date entered when running the Suggest Contracts.

Options Navigate Less options				
Print Proforma + Post Invoices... Rental Contract Post and Print Invoice				
0.	SELL-TO CUSTOMER NAME	POSTING DATE	BILL UNTIL DATE	INVO
	Adatum Corporation	7/3/2018	7/3/2018	

Click on the cell **Ready to Invoice**

Note that the Ready to Invoice field is checked and no error related to the Posting Date has occurred when Early Billing is used.

Print Invoices...			
INVOICE AMOUNT	INVOICE AMOUNT INCL. TAX	READY TO INVOICE	ERROR MESSAGE
10,000.00	10,200.00	<input checked="" type="checkbox"/>	



Click on the navigation menu item popup **Process**

RENTAL INVOICING WORKSHEET

Rental Invoicing Worksheet

Batch Name

Manage **Process** History | Actions | Navigat

Suggest Contracts... Validate Lines Print Proforma

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00019	10000	Adatum C

Click on the navigation menu item **Print Proforma**

ental Invoicing Worksheet

ch Name D

anage Process History | Actions | Navigate | Less options

Suggest Contracts... Validate Lines **Print Proforma** Post Invoices...

Prepare to print the proforma invoice. A report re

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	PO
RC00019	10000	Adatum Corporation	7/3

Click on the field **Number of Copies**

ne options and filters below will be saved only to: 'Last used options and filters'

values from: Last used options and filters

opies 0

y Address ☒

te Prices ☒

..... 7/3/2018

INVOICE AMOUNT
INCL. TAX
10,200.00

Click on **Print Company Address, Yes**

values from: Last used options and filters

opies 10

y Address ☒

te Prices ☒

..... 7/3/2018

contract

INVOICE AMOUNT
INCL. TAX
10,200.00



ODT Rentals Online Help

Click on **Show Alternate Prices, Yes**

The screenshot shows a form with several fields. The 'Show Alternate Prices' toggle switch is highlighted with a red box. To the right of the form, there is a summary table:

INVOICE AMOUNT	
INCL. TAX	
	10,200.00

Click on the field **Cut-off Date**

Note that the Cut-off Date is July 3.
Ensure the date is the same as on the line in the
Rental Invoicing Worksheet.

The screenshot shows the same form as before, but now the 'Cut-off Date' field is highlighted with a red box. A tooltip is visible over the date field, stating: "Type the date in the format MM/DD/YYYY".

Click on the button **Preview**

The screenshot shows a modal window with several fields and buttons. The 'Preview' button is highlighted with a red box. The modal window contains the following fields and buttons:

- to Customer No. (dropdown)
- is: (dropdown)
- to Code (dropdown)
- is: (dropdown)
- Buttons: Send to..., Print, Preview, Cancel

The Proforma can be printed as well, or sent to a PDF document.

Displayed here is the preview of the Proforma Invoice for the invoice that will be posted.

Note that the posting date on the invoice is July 1 and the rental period that will be billed is for July 5 through August 4.



CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Sell

To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Ship

To: Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772

Rental Proforma Invoice

Page: 1

Rental Contract Number: RC00019

Rental Proforma Date: 7/3/2018

P.O. Number

Customer ID 10000

SalesPerson Peter Saddow

Ship Via

Terms

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002	Buckeye Ditcher	BD-002	1		5,000.00
Rental	Jul 07, 2018 to Aug 06, 2018		1 @ 5,000.00/Month = 5,000.00		
RU00003	Buckeye Ditcher	BD-003	1		5,000.00
Rental	Jul 07, 2018 to Aug 06, 2018		1 @ 5,000.00/Month = 5,000.00		

Amount Subject to Sales Tax 10,000.00

Amount Exempt from Sales Tax 0.00

Subtotal: 10,000.00

Total Sales Tax: 200.00

Total: 10,200.00

The contract can now be posted using either Posted or the Post and Print Invoices ribbon option.

ODT Rentals Online Help

5/15/2024

1099/2540



Click on the navigation menu item **Post Invoices...**

ricing Worksheet

..... DEFAULT

History | Actions | Navigate | Less options

➔ Validate Lines | Print Proforma | **Post Invoices...** | Rental Contract

Finalize the document by posting the amounts a

SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	POSTING DATE	BILL U
10000	Adatum Corporation	7/3/2018	

Click on the button **Yes**

7/3/2018 10,000.00 10,200

? Are you sure you want to invoice the selected contracts?

Yes No

Yes

The following displays the updates made to the Rental Contract upon the posting of the early invoice.

Click on the link **Rental Contracts- Open1**

Business Central

Activities

Rental Activities

RENTAL

RENTAL QUOT... OPEN 1

RENTAL CONT... OPEN - 1

CONTRACTS SHIP/RETURN

SHIPMENTS D... TODAY 0

SHIPMEN... FUTURE 0

Rental Contracts - Open. Specifies the number of rental

Click on the link in cell **No.** with the value **RC00019**

Dynamics 365 | Business Central | Rental Contracts, Rental Contracts - Open

CRONUS Rentals, Inc. | Sales | Purchasing | Inventory | Posted

Rental Contracts: Rental Contracts - Open | Search | + New | X De

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME
RC00019	10000	Adatum Corporation



Click on the field **Posting Date**

The Posting Date has been updated to July 1 as per the Posting Date used in the Rental Invoicing Worksheet.

Proforma

Adatum Corporation	Ext
7/3/2018	Ren
6/7/2018	Dep
7/3/2018	Cor
	Out

Manage More options

Click on the cell **Rental Unit No.**

Rental Lines Manage More options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher

Sales Lines Manage

Click on the navigation menu item **More options**

Quote No.

Posting Date 7/3/2018

Order Date 6/7/2018

Document Date 7/3/2018

Rental Lines Manage More options

New Line Delete Line Reveal secondary actions

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 7/3/2018

Order Date 6/7/2018

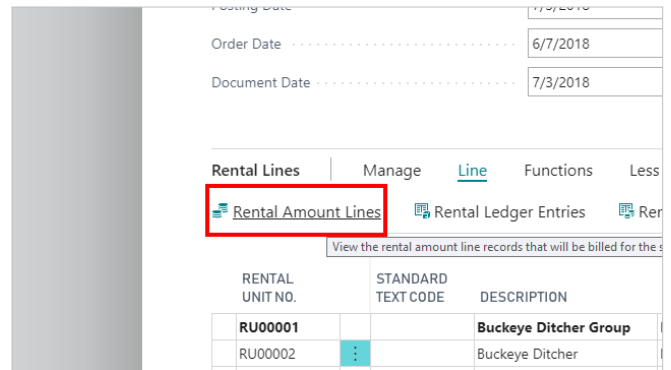
Document Date 7/3/2018

Rental Lines Manage Line Functions Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-PST

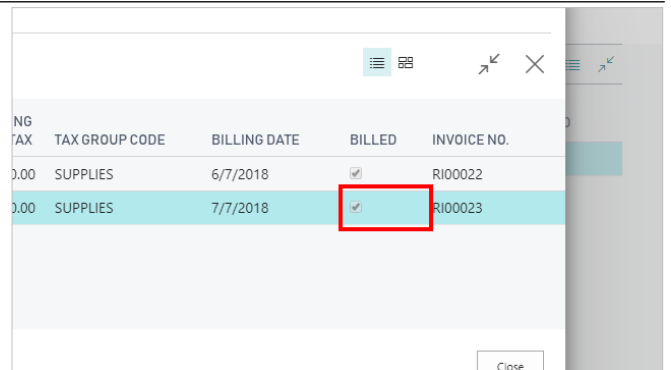
Click on the navigation menu item **Rental Amount Lines**



The screenshot shows the 'Rental Amount Lines' menu item highlighted with a red box. The menu is part of a larger interface with tabs for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Less'. Below the menu, there is a table with columns: RENTAL UNIT NO., STANDARD TEXT CODE, and DESCRIPTION. The table contains two rows: RU00001 with description 'Buckeye Ditcher Group' and RU00002 with description 'Buckeye Ditcher'.

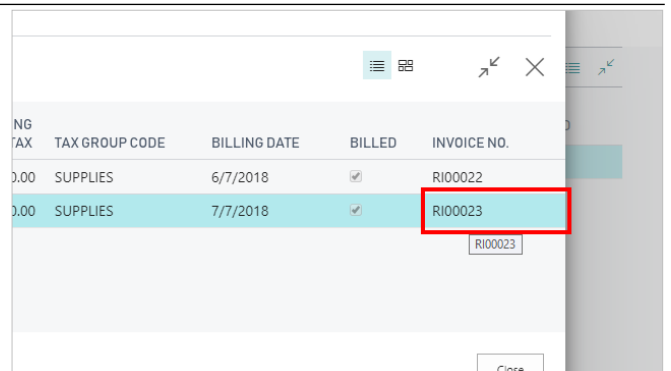
Click on the cell **Billed**

Note that the record for the second invoice posted from the Rental Invoicing Worksheet for the period has been marked as billed.



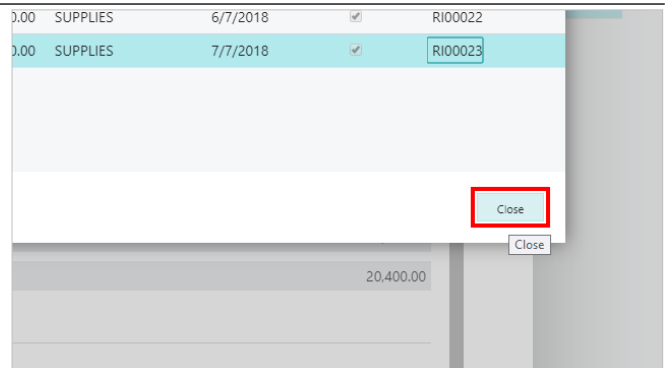
The screenshot shows a table with columns: NG TAX, TAX GROUP CODE, BILLING DATE, BILLED, and INVOICE NO. The table contains two rows: 0.00 SUPPLIES 6/7/2018 and 0.00 SUPPLIES 7/7/2018. The 'BILLED' column for the 7/7/2018 row is checked and highlighted with a red box. The 'INVOICE NO.' for the 7/7/2018 row is RI00023.

Click on the cell **Invoice No.** with the value **RI00023**



The screenshot shows the same table as the previous one, but the 'INVOICE NO.' cell for the 7/7/2018 row (RI00023) is highlighted with a red box. A 'Close' button is visible at the bottom right of the window.

Click on the button **Close**



The screenshot shows the same table as the previous one, but the 'Close' button at the bottom right of the window is highlighted with a red box. The 'INVOICE NO.' cell for the 7/7/2018 row (RI00023) is still highlighted.

To review the Posted Invoice, go to the command bar option, Rentals, and select Posted Invoices.

3.14.2.3. How to Batch Invoice an Early Billing Contract with Varied Dates

When a Rental Contract has the units shipped on a date that is earlier than when the rental commences (Rental Start Date), then the first invoice and subsequent invoices can be processed from the Rental Invoicing Worksheet using the Early Billing Date feature.

The following example demonstrates this process.



ODT Rentals Online Help

The steps in the second example consist of the following which incorporates the use of varied dates on the contract.

- A contract will be created with an Order Date of June 5, using the monthly periodic start term that was setup with an Early Billing Date Formula of 5D (5 days)
- Adding the Required Shipping Date to the Rental Lines using the Dynamics 365 Business Central Personalize function.
- The Rental Start Date will be set to June 15, which is when the rental will commence.
- The Rental Return Date will be set to August 14 for a two month rental.
- The Required Shipping Date for the units will be set to June 10.
- The shipment will be posted using a Posting Date of June 10.
- The first invoice will be generated and posted from the Rental Invoicing Worksheet using a Posting Date of June 10.

Click on the navigation menu item **Rental Contract**

Click on the field **Sell-to Customer Name**

Click on **No. = 10000, Name = Adatum Corporation, City = Atlanta**



ODT Rentals Online Help

Click on the field **Posting Date**

Note that Posting Date, Order Date and Document Date are all set to June 5.

Proforma

Adatum Corporation	Ext
	Ren
6/5/2018	Dep
6/5/2018	Cor
6/5/2018	Out

Manage More options

Click on the field **Rental Terms Code**

Show more

MONTH-PEND	0.00
	0.00
	0.00

Click on the link

Show more

MONTH-PEND	0.00
	0.00
	0.00

Click on **Code = MONTH-PSTART-EARLY**,
Description = Monthly Rental - Early Per. Billing in Advance

nal Document No.	
al Terms Code	MONTH-PEND
isit Amount	
ract Total	
tanding Amount	

CODE	DESCRIPTION
MONTH-PSTART	Monthly Rental - Per
MONTH-PSTART-EA...	Monthly Rental - Ear
MONTH-S	Monthly Rental for B
WEEK-END	Weekly Rental for Bi
WEEK-END-OPT	Weekly Rental for O
WEEK-END-OPT-TIME	Weekly Rental for O

+ New



Click on the cell **Rental Unit No.**

Rental Lines | [Manage](#) | More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collaps](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | [Manage](#) | More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines | [Manage](#) | More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collaps](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Look up value

Sales Lines | [Manage](#) | More options

Click on the link in cell **No.** with the value **RU00001**

RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	<input type="checkbox"/>
RU00007	165 G Brad Nailer	<input type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
RU00006	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Terms Code**

[Manage](#) | More options

[Delete Line](#) [Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Manage

UNIT OF



ODT Rentals Online Help

Click on the link in cell **Rental Terms Code**

Manage More options

Delete Line Group Avail Matrix

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-P	0	

Look up value

Manage

UNIT OF

Click on **Code = MONTH-PSTART-EARLY**,
Description = Monthly Rental - Early Per. Billing in Advance

buckeye Ditcher Group MONTH-P 0

CODE	DESCRIPTION
MONTH-END-OPT...	Monthly Rental for C
MONTH-PEND	Monthly Rental - Per
MONTH-PEND-EARLY	Monthly Rental - Ear
MONTH-PSTART	Monthly Rental - Per
MONTH-PSTART-EA...	Monthly Rental - Ear
MONTH-	Select record "MONTH-PSTART-EARLY" for E

+ New

Click on the cell **Rental Quantity**

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	ART-EARLY	0		

UNIT OF

Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PST...	2		

UNIT OF



Click on the cell **Location Code**

s						
vail Matrix						
ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-PST...					6/
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-PST...	2	<div><div></div></div>			6/5/2018
</						

Click on the cell **Rental Unit No.**

Rental Lines

Manage

More options

New Line

Delete Line

Expand All

Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

</



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00002**

EditView

RENTAL UNIT LIST + New

NO.		DESCRIPTION	GROUP
BD-006	:	Buckeye Ditcher	
RU00002	:	Buckeye Ditcher	
RU00002	Select record "RU00002"	Buckeye Ditcher	
RU00004	:	Buckeye Ditcher	
RU00005	:	Buckeye Ditcher	
RU00006	:	Buckeye Ditcher	
SUB BUCKEYE	:	Sub Buckeye Ditcher	

Click on the cell **Rental Unit No.**

New LineDelete LineExpand AllCollaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002	...	Buckeye Ditcher
	:	Buckeye Ditcher Group

Sales LinesManageMore options

Click on the lookup button in the cell **Rental Unit No.**
lookup button

New LineDelete LineExpand AllCollaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002	...	Buckeye Ditcher
	:	Buckeye Ditcher Group

Look up value

Sales LinesManageMore options

Click on the link in cell **No.** with the value **RU00003**

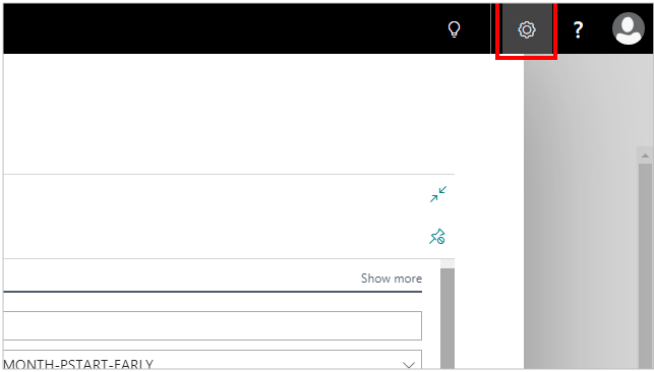
RENTAL UNIT LIST + New

NO.		DESCRIPTION	GROUP
BD-006	:	Buckeye Ditcher	
RU00002	:	Buckeye Ditcher	
RU00003	:	Buckeye Ditcher	
RU00004	Select record "RU00003"	Buckeye Ditcher	
RU00005	:	Buckeye Ditcher	
RU00006	:	Buckeye Ditcher	
SUB BUCKEYE	:	Sub Buckeye Ditcher	

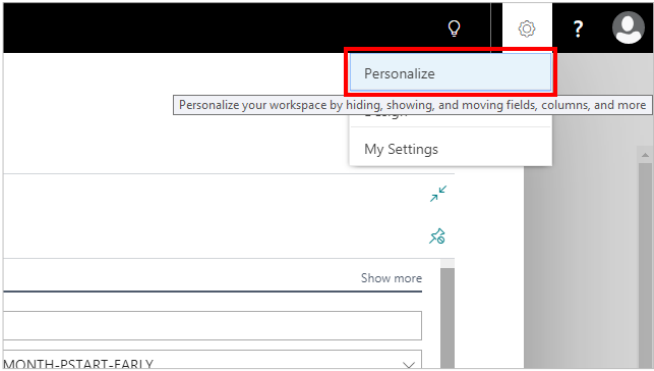
The following steps demonstrate the adding of the Required Shipping Date field to the Rental Lines.



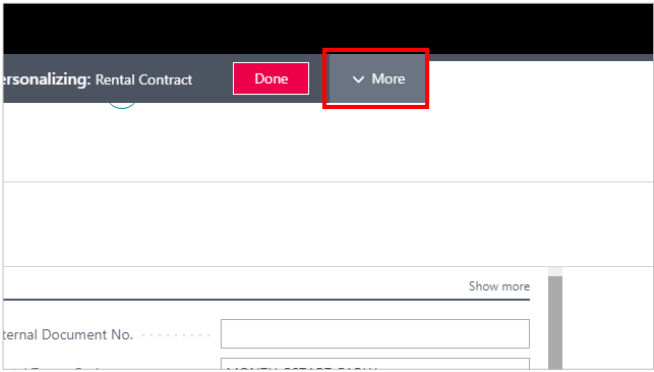
Click on the link **Settings**



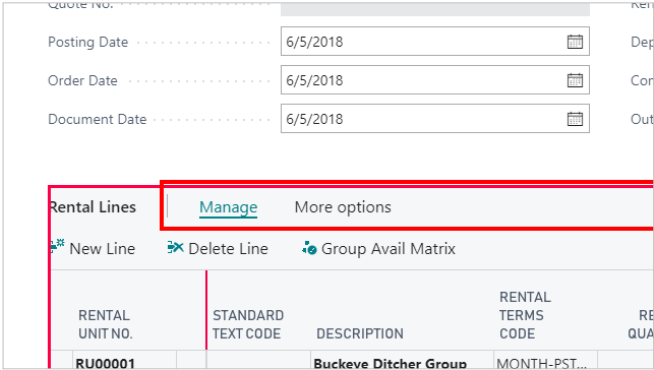
Click on the menu item **Personalize**



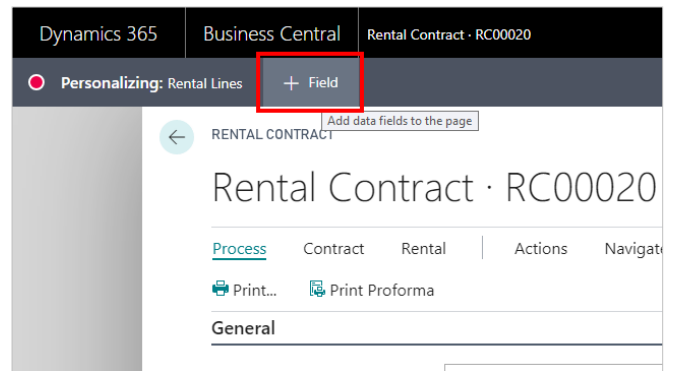
Click on the link **More**



Click on **Manage** ☐ **More options**



Click on the link **Field**

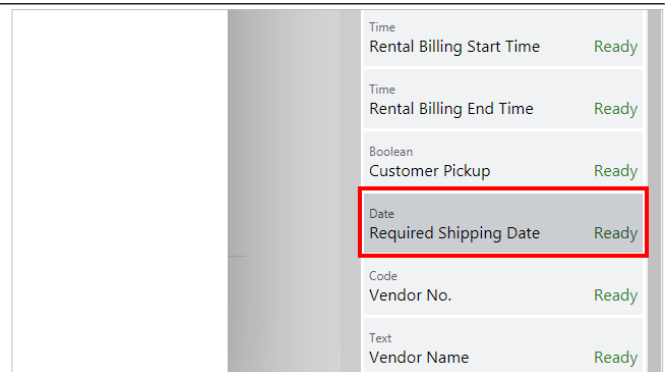


Click and hold the left mouse button on the data brick
Caption = Required Shipping Date

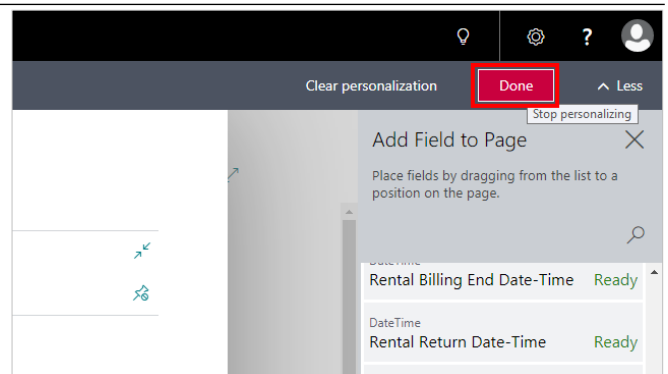
Drag and drop the Required Shipping Date field to
where you want this on the Rental Line.

Note:

As the Required Shipping Date must be changed after
the Rental Start Date is changed, it is recommended
to have this field somewhere after the Rental Start
Date.



Click on the link **Done**



The following steps demonstrate the setting of the
Rental Start Date, Rental Return Date and Required
Shipping Date fields, to the dates as indicated in the
steps for this example.

Click on the cell **Rental Start Date**

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTA
EAST			6/5/2018	6/5/2018	7/4/2018	5
EAST			6/5/2018	Type the date in the format M/d/yyyy		5
EAST			6/5/2018	6/5/2018	7/4/2018	5



ODT Rentals Online Help

Click on the link in cell **Rental Start Date**

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
EAST			6/5/2018	6/5/2018	7/4/2018	5,000.00
EAST			6/5/2018	6/5/2018	7/4/2018	5,000.00
EAST			6/5/2018	6/5/2018	7/4/2018	5,000.00

Click on a date in the calendar

Select June 15 as per the steps in the example information.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENT UNIT PRICE
		6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00
					5,000.00	0.00
					5,000.00	0.00

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Today Done

INIT PRICE EXCL. TAX	TAX GROUP CODE	AMOUNT EXCL. TAX	INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHIP
0.00	*	0.00	0.00	0	0

Click on the cell **Required Shipping Date**

Note that the Shipping Date was updated to the new Rental Start Date.

Thus this field must be modified after updating the Rental Start Date.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENT UNIT PRICE
		6/15/2018	6/15/2018	7/4/2018	5,000.00	0.00
		6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00
		6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00

Click on the link in cell **Required Shipping Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENT UNIT PRICE
		6/15/2018	6/15/2018	7/4/2018	5,000.00	0.00
		6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00
		6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00



ODT Rentals Online Help

Click on a date in the calendar

Select June 10 as per the step in the example information.

RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RE UNIT PRICE
6/15/2018	6/15/2018	7/4/2018	5,000.00	0.00	
6/5/2018			5,000.00	0.00	
6/5/2018			5,000.00	0.00	

June 2018

Mo	Tu	We	Th	Fr	Sa	Su
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Today Done

LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED
-----------------------------	----------------------------	--------------------	--------------	---------------------

Click on the cell **Rental Return Date**

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RE UNIT PRICE
	6/15/2018	6/10/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RE UNIT PRICE
	6/15/2018	6/10/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	

Click on the link **Next**

REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RE UNIT PRICE
6/10/2018	7/4/2018	5,000.00	0.00	
6/5/2018			0.00	
6/5/2018			0.00	

July 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Next



ODT Rentals Online Help

Click on a date in the calendar

Select August 14 as per the steps in the example information.

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 R UNIT
	6/15/2018	6/10/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018			0.00	
	6/5/2018	6/5/2018			0.00	

August 2018

Mo	Tu	We	Th	Fr	Sa	Su
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Today Done

TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED
*	0.00	0.00	0	0	0

Press the **Arrow down** key.

When moving off a group line all child lines will be updated with the same dates entered on the fields just changed.

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 R UNIT
	6/15/2018	6/10/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	
	6/5/2018	6/5/2018	7/4/2018	5,000.00	0.00	

TAX GROUP CODE	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED
*	0.00	0.00	0	0	0

The following steps demonstrate the posting of the shipment of the units.

Click on the field **Posting Date**

Proforma

Adatum Corporation	Ext
	Rer
6/5/2018	Dep
6/5/2018	Cor
6/5/2018	Out

Manage More options

Click on the link

corporation	External Document No.
	Rental Terms Code
	Deposit Amount
	Contract Total
	Outstanding Amount



ODT Rentals Online Help

Click on a date in the calendar

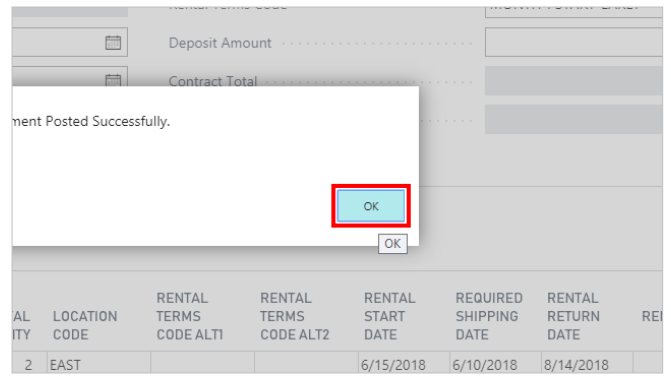
Select June 10 as this is the date the units are being shipped to the customer.

Click on the navigation menu item popup **Rental**

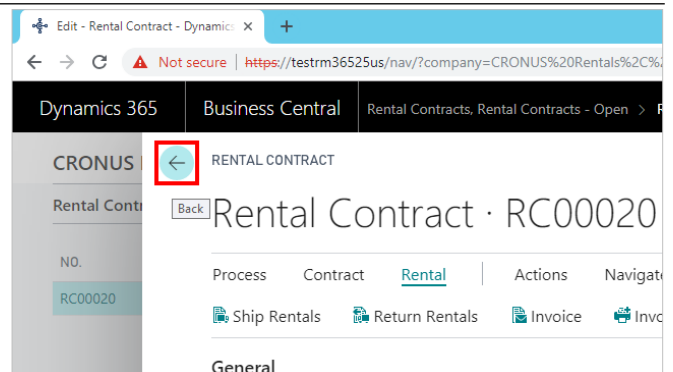
Click on the navigation menu item **Ship Rentals**

Click on the button **Yes**

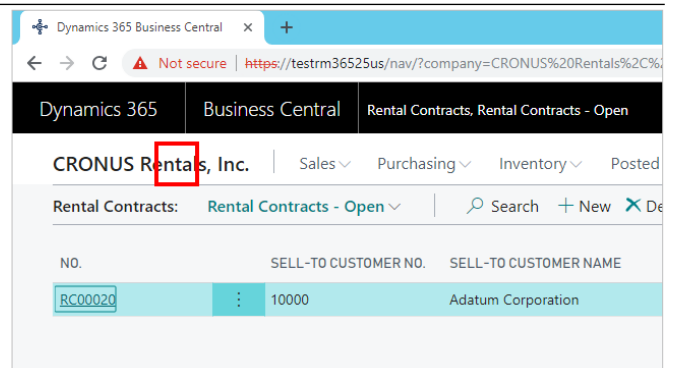
Click on the button **OK**



Click on the back button

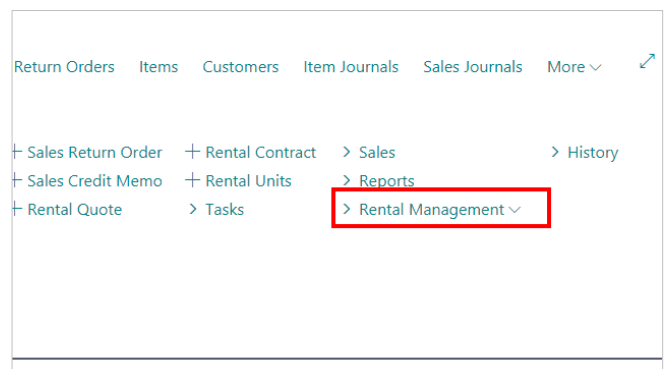


Press the **Esc** key.



The following steps demonstrate the use of the Rental Invoicing Worksheet to generate the invoice on June 10, for the rental period of June 15 through July 14.

Click on the navigation menu item popup **Rental Management**





ODT Rentals Online Help

Click on the navigation menu item **Rental Invoicing Worksheet**

Return Orders Items Customers Item Journals Sales Journals More ▾

▸ Sales Return Order ▸ Rental Contract ▸ Sales ▸ History

▸ Sales Credit Memo ▸ Rental Units ▸ Reports

▸ Rental Quote ▸ Tasks ▸ Rental Management

Rental Invoicing Worksheet

Group Create and batch post a group of rental invoices

Sub Rental Worksheet

ODT Rental Online Help

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central Rental Invoicing Worksheet

← RENTAL INVOICING WORKSHEET

Batch Name

Manage **Process** History Actions Navigation

✕ Delete

DOCUMENT NO. SELL-TO CUSTOMER NO. SELL-TO C

Click on the navigation menu item **Suggest Contracts...**

← RENTAL INVOICING WORKSHEET

Batch Name

Manage Process History Actions Navigation

Suggest Contracts... Validate Lines Print Proforma

Populates the rental invoicing worksheet with contracts available to be

DOCUMENT NO. SELL-TO CUSTOMER NO. SELL-TO C

Click on the field **Posting Date**

EDIT - RENTAL INVOICING SUGGEST LINES

Options

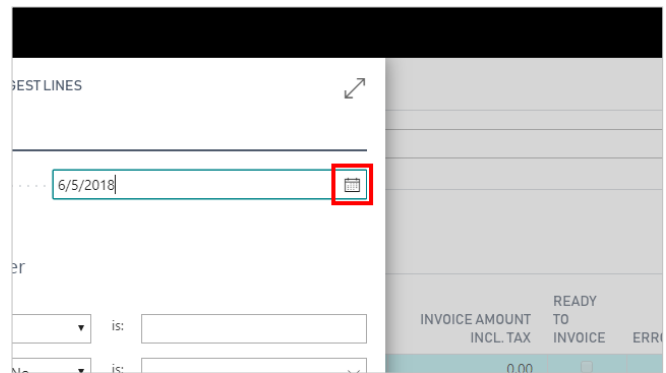
Posting Date **6/5/2018** Type the date in the format MM/DD/YYYY

Rental Contract Header

Show results:

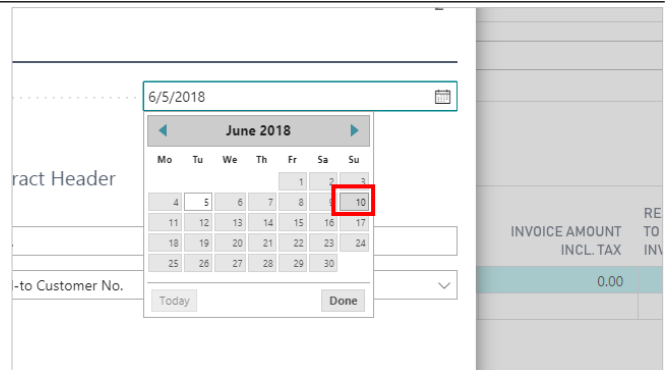
Where: No. is: And: Sell-to Customer No. is:

Click on the link

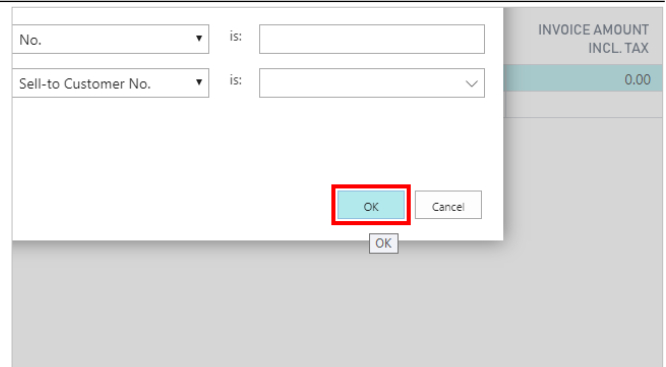


Click on a date in the calendar

Select June 10 as the Posting Date to be used when posting the invoice early for the rental from June 15 to July 14.

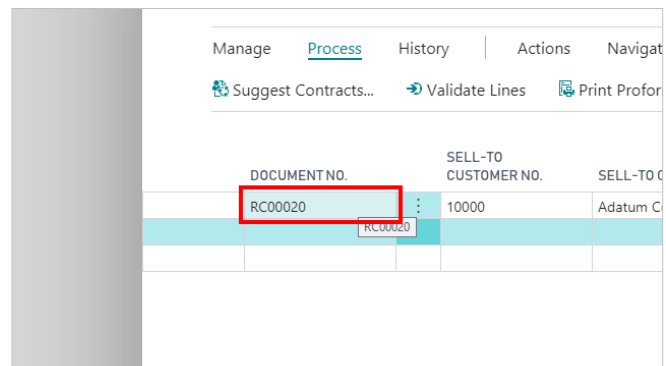


Click on the button **OK**



For a selected line on the worksheet, the open Rental Contract can be viewed by selecting the Rental Contract option located in the menu option Related, then Line.

Click on the cell **Document No.** with the value **RC00020**



DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
RC00020	10000	Adatum C



ODT Rentals Online Help

Click on the cell **Posting Date** with the value
6/10/2018

Note that the Posting Date on the Worksheet line was
set to June 10 as entered when running the Suggest
Contracts.

ations

Navigate

Less options

Print Proforma

Post Invoices...

Rental Contract

Post and Print Inv

0.	SELL-TO CUSTOMER NAME	POSTING DATE	BILL UNTIL DATE	INVO
	Adatum Corporation	6/10/2018		
			6/10/2018	

Click on the cell **Ready to Invoice**

Note that the line for the contract has the Ready to
Invoice checked.
This means you are good to go ahead an invoice the
contract.

Print Invoices...

INVOICE AMOUNT	INVOICE AMOUNT INCL. TAX	READY TO INVOICE	ERROR MESSAGE
10,000.00	10,200.00	<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	

The following shows the steps for Previewing the Proforma Invoice which displays what will be invoiced to the
customer.

Click on the navigation menu item **Print Proforma**

ental Invoicing Worksheet

ch Name

Process History Actions Navigate Less options

Suggest Contracts... Validate Lines **Print Proforma** Post Invoices...

Prepare to print the proforma invoice. A report requ

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	PO
RC00020	10000	Adatum Corporation	6/1

Click on the field **Cut-off Date**

opies 0

y Address

te Prices

6/10/2018

Type the date in the format M/d/yyyy

contract

No. is:

INVOICE AMOUNT
INCL. TAX
10,200.00



ODT Rentals Online Help

Click on the button **Preview**

A screenshot of a software interface. It features a form with two rows of input fields. The first row has a dropdown menu labeled "-to Customer No." followed by a text input field and a small downward arrow. The second row has a dropdown menu labeled "p-to Code" followed by a text input field and a small downward arrow. Below the form, there are four buttons: "Send to...", "Print", "Preview", and "Cancel". The "Preview" button is highlighted with a red rectangular box. Below the "Preview" button, there is a small, faint "Preview" label.

Note that in the following picture:

The Rental Proforma Date is June 10. When the invoice is posted the Invoice Date will be June 10 and all entries posted will have a Posting Date of June 10.

In the body of the Proforma the rental period that will be invoiced is June 15 through July 14.

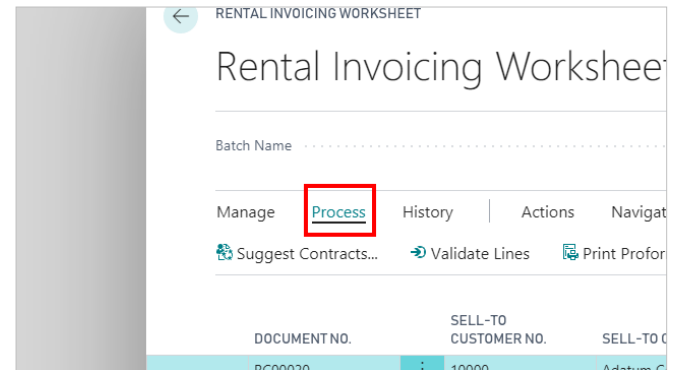


CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Proforma Invoice Page: 1 Rental Contract Number: RC00020 Rental Proforma Date: 6/10/2018			
Sell To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772	Ship To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772	P.O. Number Customer ID 10000 SalesPerson Peter Sadow	Ship Via Terms		
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00002 Rental	Buckeye Ditcher Jun 15, 2018 to Jul 14, 2018	BD-002	1 1 @ 5,000.00/Month = 5,000.00		5,000.00
RU00003 Rental	Buckeye Ditcher Jun 15, 2018 to Jul 14, 2018	BD-003	1 1 @ 5,000.00/Month = 5,000.00		5,000.00
Amount Subject to Sales Tax 10,000.00				Subtotal:	10,000.00
Amount Exempt from Sales Tax 0.00				Total Sales Tax:	200.00
				Total:	10,200.00

The following steps demonstrate the posting of the invoice.

Optionally Post and Print Invoices or Post and Send can be used.

Click on the navigation menu item popup **Process**



RENTAL INVOICING WORKSHEET

Rental Invoicing Worksheet

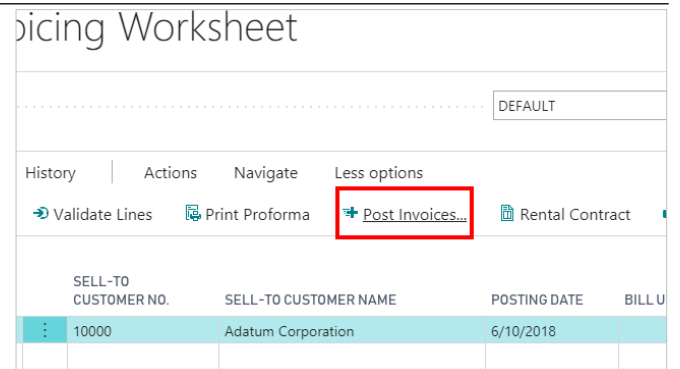
Batch Name

Manage **Process** History Actions Navigat

Suggest Contracts... Validate Lines Print Profor

DOCUMENT NO.	SELL-TO CUSTOMER NO.	SELL-TO C
R000020	10000	Adatum C

Click on the navigation menu item **Post Invoices...**



Rental Invoicing Worksheet

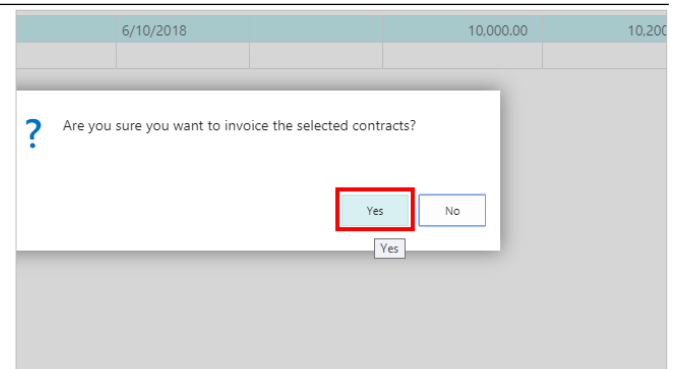
Batch Name DEFAULT

History Actions Navigate Less options

Validate Lines Print Proforma **Post Invoices...** Rental Contract

SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	POSTING DATE	BILL U
10000	Adatum Corporation	6/10/2018	

Click on the button **Yes**

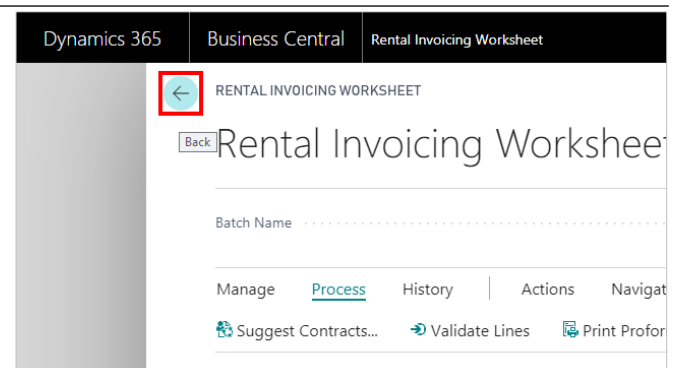


Are you sure you want to invoice the selected contracts?

Yes No

Yes

Click on the back button



Dynamics 365 Business Central Rental Invoicing Worksheet

RENTAL INVOICING WORKSHEET

Back Rental Invoicing Worksheet

Batch Name

Manage **Process** History Actions Navigat

Suggest Contracts... Validate Lines Print Profor

As the Rental Contract is still open the Posted Rental Invoice can be viewed from the contract by selecting Posted Invoices on the command bar Rentals option.

For the Sale Order Processor Profile, the user can alternatively view the Posted Sale Invoice from the home page, by selecting Posted Documents in the command bar, and then select Posted Sales Invoices. Then locate and open the last invoice posted.

For the Business Manager Profile the user can alternatively view the Posted Rental Invoice from the home page of the interface, by selecting Rentals in the command bar, and then selecting Posted Rental Invoices. Then locate and open the last invoice posted.



3.14.3. How to How to Batch Invoice Contracts using Bill Until Date

3.14.3.1. Overview

The Suggest Contracts request page includes the Posting Date and the Bill Until Date fields.

When Bill Until Date is left blank on the contract, then the Posting Date is used to determine which Rental Contracts are to be billed.

When Bill Until Date is also populated, then the date specified in the Bill Until Date field is used to determine which Rental Contracts and the amounts that are to be billed.

To learn about the Bill Until Date feature, see ODT Rental Online Help, Processing Rentals, Rental Contracts, How to Process Invoices using Bill Until Date.

3.14.3.2. Batch Invoicing Using the Bill Until Date Feature

With this example both of the contracts are to bill the customer up to and including June 5.

However, the invoice is to be posted with a Posting Date of May 31 so that the entries will be posted in the May accounting period.

This example includes 2 contracts which are for billing the customer at a daily rate.

One contract has a rental group with 2 units and a Rental Term which is for periodic invoicing at the end of each rental period. The Rental Start Date is May 25, and the expected Return Date is June 11. The daily rental rate for the units is 400.00 per day.

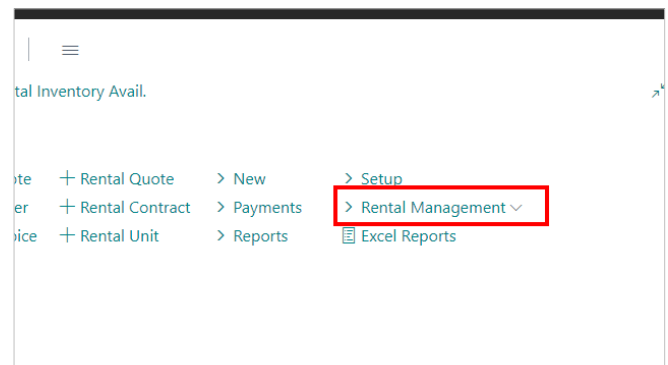
The expected amount excluding tax to be invoiced is $12 \text{ days} \times 400.00 \times 2 \text{ units}$, which equals 9,600.00

The other contract has a Rental Term which is for periodic invoicing at the start of each rental period, and has a Rental Start Date of May 28 and an expected Return Date of June 30 on all rental lines.

The contract includes a single rental unit with a quantity of 2, and a group with a quantity of 2. The single unit has a daily rental rate of 25.00 per day, and the units in the group have a daily rental rate of 10.00 per day.

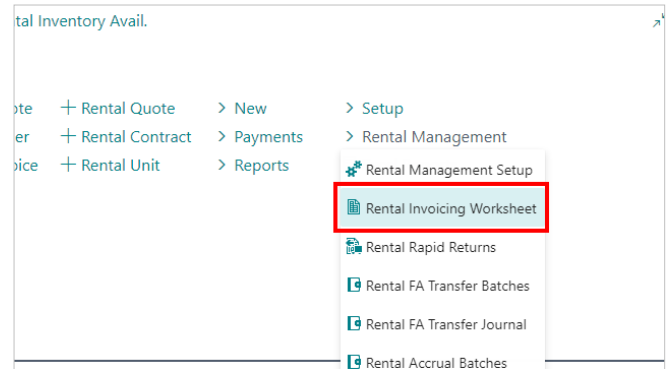
The expected invoice amount excluding tax is $(9 \text{ days} \times 25.00 \times 2) + (9 \text{ days} \times 10.00 \times 2)$, which equals 630.00.

Click on the navigation menu item popup **Rental Management**

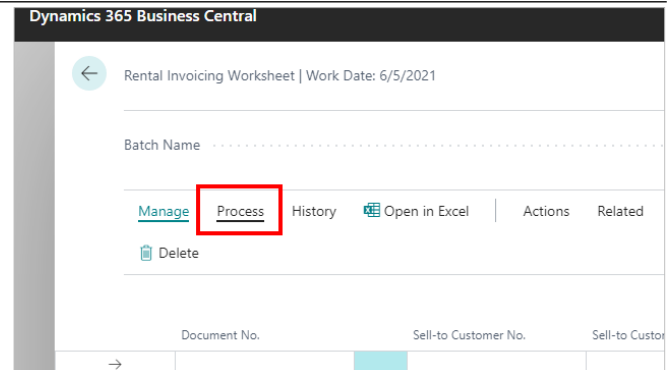


ODT Rentals Online Help

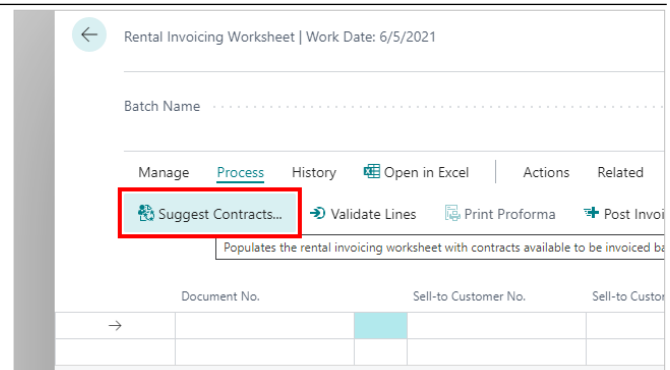
Click on the navigation menu item **Rental Invoicing Worksheet**



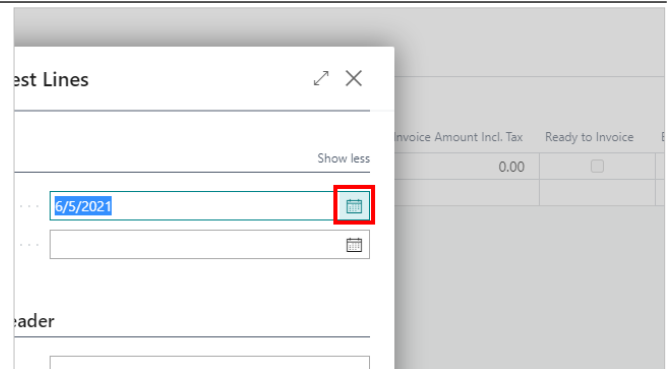
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Suggest Contracts...**



Click on the link **Open the date picker for Posting Date**





Click on the link **Previous**

Rental Invoicing Suggest Lines

Options

Posting Date 6/5/2021

Bill Until Date

Filter: Rental Contract Header

× No.

× Sell-to Customer No.

Click on a date in the calendar

Select May 31.

Posting Date 6/5/2021

Bill Until Date

Filter: Rental Contract Header

× No.

× Sell-to Customer No.

+ Filter...

Click on the link **Open the date picker for Bill Until Date**

Posting Date 5/31/2021

Bill Until Date

Filter: Rental Contract Header

× No.

× Sell-to Customer No.

+ Filter...

Click on a date in the calendar

Select June 5 so that the contracts will be billing up to and including June 5.

Posting Date 5/31/2021

Bill Until Date

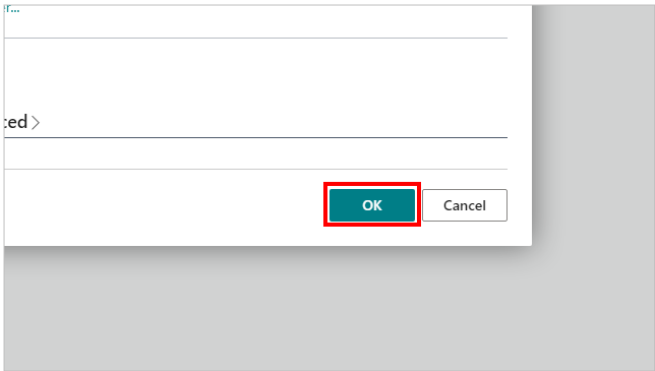
Filter: Rental Contract Header

× No.

× Sell-to Customer No.

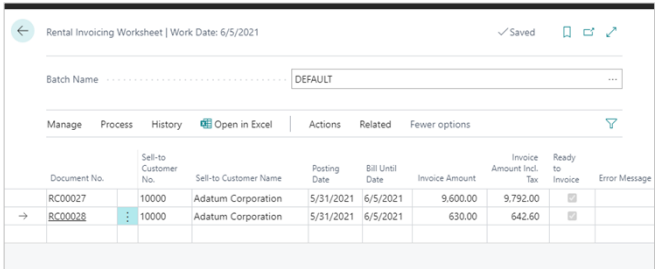
+ Filter...

Click on the button **OK**



For this example, the Bill Until Date field was added using Personalize to show that the dates have defaulted from the Suggest Contracts request page.
Note that the Invoice Amount for each contract matches the expected results.

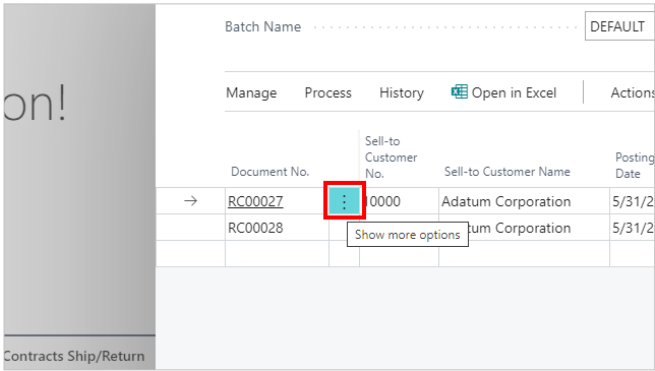
Rental Invoicing Worksheet



Document No.	Sell-to Customer No.	Sell-to Customer Name	Posting Date	Bill Until Date	Invoice Amount	Invoice Amount Incl. Tax	Ready to Invoice	Error Message
RC00027	10000	Adatum Corporation	5/31/2021	6/5/2021	9,600.00	9,792.00		
→ RC00028	10000	Adatum Corporation	5/31/2021	6/5/2021	630.00	642.60		

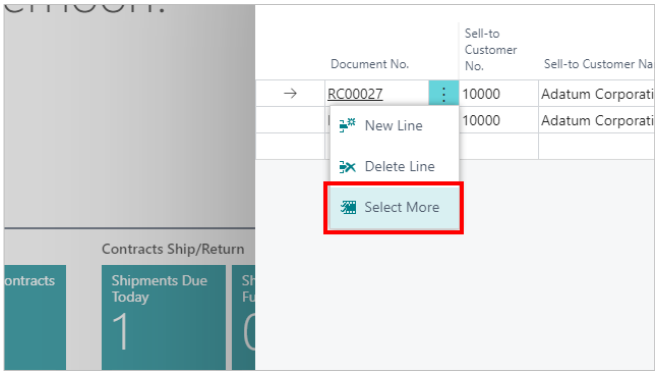
The following demonstrates the previewing of the Proforma Invoice and the posting of the Invoices.
The invoicing options available are Post Invoices, Post and Print Invoices, and Post and Send Invoices.

Click on the row menu button



Document No.	Sell-to Customer No.	Sell-to Customer Name	Posting Date
→ RC00027	10000	Adatum Corporation	5/31/2021
RC00028	10000	Adatum Corporation	5/31/2021

Click on the menu item **Select More**



Document No.	Sell-to Customer No.	Sell-to Customer Name
→ RC00027	10000	Adatum Corporation
	10000	Adatum Corporation



Click on the column header **Selected**

Rental Invoicing Worksheet | Work Date: 6/5/2021

Batch Name

Manage Process History Open in Excel

Document No.	Sell-to Customer No.	Sell-to Customer Name
RC00027	10000	Adatum Co
RC00028	10000	Adatum Co

Click on the navigation menu item popup **Process**

Rental Invoicing Worksheet | Work Date: 6/5/2021

Batch Name

Manage Process History Open in Excel

Document No.	Sell-to Customer No.	Sell-to Customer Name
RC00027	10000	Adatum Corporation
RC00028	10000	Adatum Corporation

Click on the navigation menu item **Print Proforma**

Rental Invoicing Worksheet | Work Date: 6/5/2021

Batch Name

Manage Process History Open in Excel

Suggest Contracts... Print Proforma Rental Contract

Validate Lines Post Invoices... Post and Print Invoices...

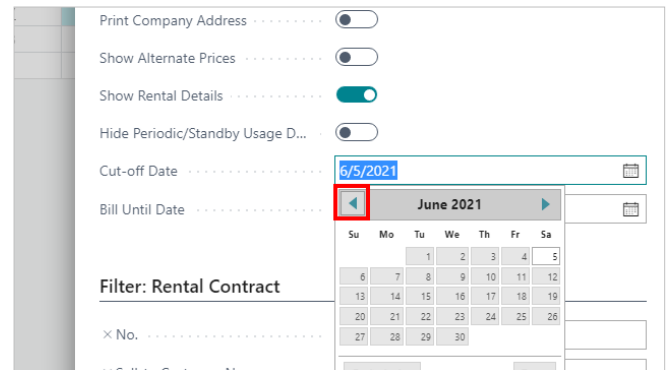
Document No.	Sell-to Customer No.	Sell-to Customer Name	Invoice Date	Invoice No.
RC00027	10000	Adatum Corporation	5/31/2021	6/5/2021
RC00028	10000	Adatum Corporation	5/31/2021	6/5/2021

Click on the link **Open the date picker for Cut-off Date**

Invoice Error Message

6/5/2021

Click on the link **Previous**




Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage D... ☐

Cut-off Date 6/5/2021

Bill Until Date 

Filter: Rental Contract

× No.

× Sell-to Customer No.

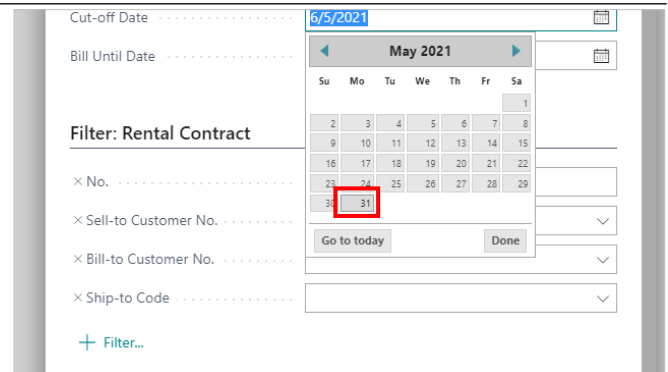
× Bill-to Customer No.

× Ship-to Code


+ Filter...

Click on a date in the calendar

The Cut-off Date must be set to the Posting Date that was used when suggesting contracts and is on the lines.



Cut-off Date 6/5/2021

Bill Until Date 

Filter: Rental Contract

× No.

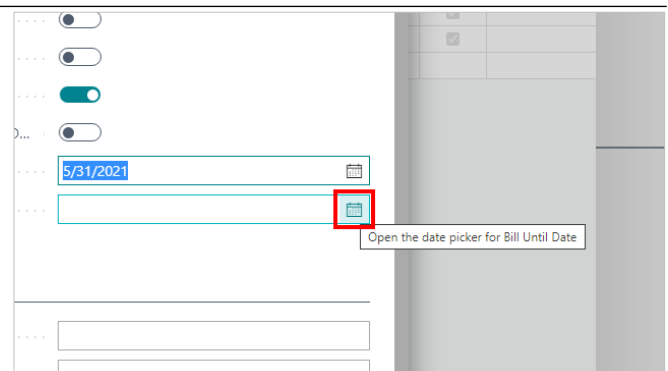
× Sell-to Customer No.

× Bill-to Customer No.

× Ship-to Code

+ Filter...

Click on the link **Open the date picker for Bill Until Date**




Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage D... ☐

Cut-off Date 5/31/2021

Bill Until Date 

Filter: Rental Contract

× No.

× Sell-to Customer No.

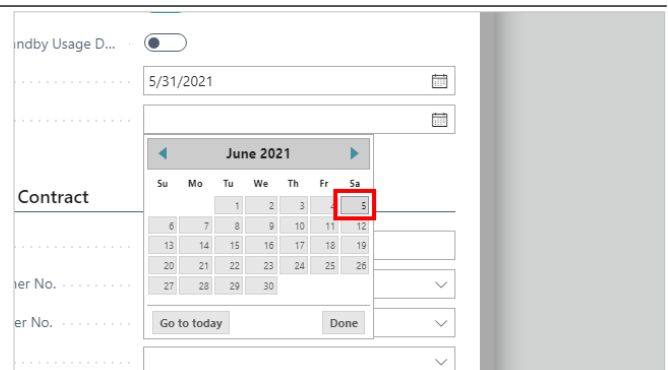
× Bill-to Customer No.

× Ship-to Code

+ Filter...

Click on a date in the calendar

The Bill Until Date must be set to the date that is on the lines.




Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage D... ☐

Cut-off Date 5/31/2021

Bill Until Date 

Filter: Rental Contract

× No.

× Sell-to Customer No.

× Bill-to Customer No.

× Ship-to Code

+ Filter...




Click on the button **Preview & Close**

A screenshot of a software interface. At the top, there is a dropdown menu labeled "X Ship-to Code" with a downward arrow. Below it is a "+ Filter..." link. Further down, there is a section labeled "Filter: Rental Additional Note" with another "+ Filter..." link. At the bottom of the interface, there are four buttons: "Send to...", "Print", "Preview & Close", and "Cancel". The "Preview & Close" button is highlighted with a red rectangular box.

The following picture displays the Proforma Invoice. Note that the Proforma Invoice Date is May 31.





CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Proforma

Page: 1

Rental Contract Number: RC00028
Rental Proforma Date: 5/31/2021

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number
Customer ID 10000
SalesPerson Jim Olive

Ship Via
Ship Method
Terms 1 Month/2% 8 days

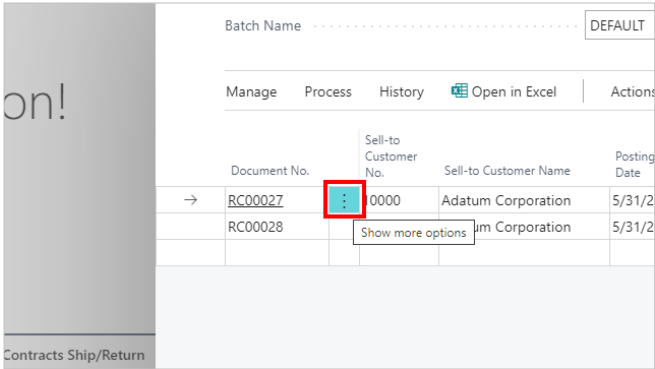
No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
PG-001	Portable Generators		2		450.00
Rental	May 28, 2021 to Jun 05, 2021		18 @ 25.00/	Daily Rental = 450.00	
RU00009	16 G Brad Nailers Group		2		
RU00009-001	16 G Brad Nailer	16BN-001	1		90.00
Rental	May 28, 2021 to Jun 05, 2021		9 @ 10.00/	Daily Rental = 90.00	
RU00009-002	16 G Brad Nailer	16BN-002	1		90.00
Rental	May 28, 2021 to Jun 05, 2021		9 @ 10.00/	Daily Rental = 90.00	
				Subtotal:	630.00
Amount Subject to Sales Tax USD 630.00				Total Sales Tax:	12.60
Amount Exempt from Sales Tax USD 0.00				Total USD:	642.60

The following steps demonstrate the invoicing of the contracts.

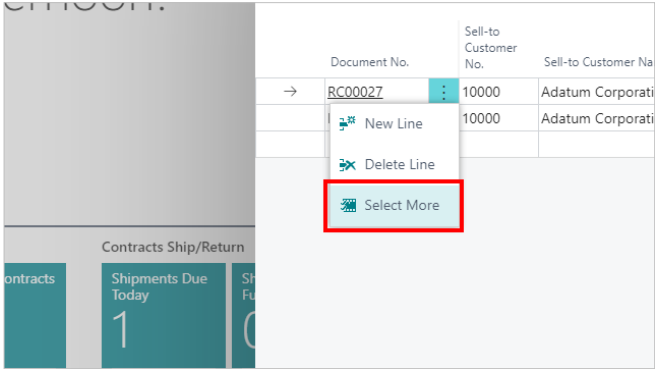


ODT Rentals Online Help

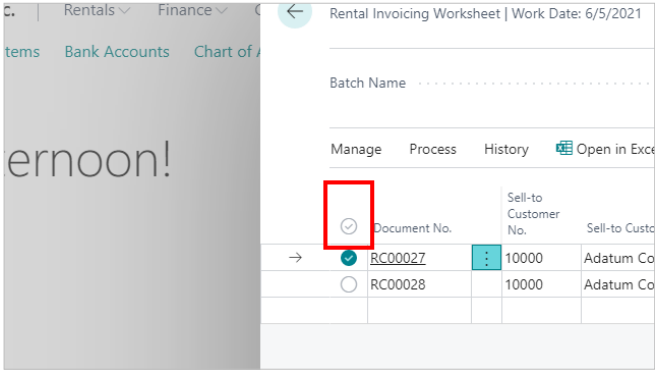
Click on the row menu button



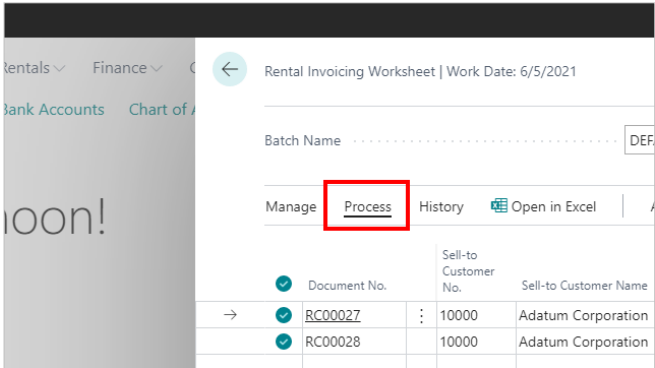
Click on the menu item **Select More**



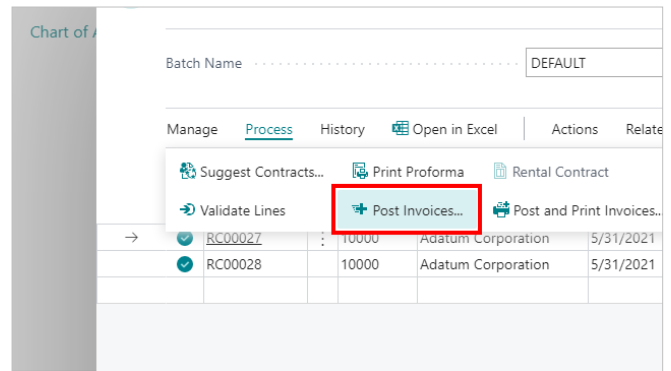
Click on the column header **Selected**



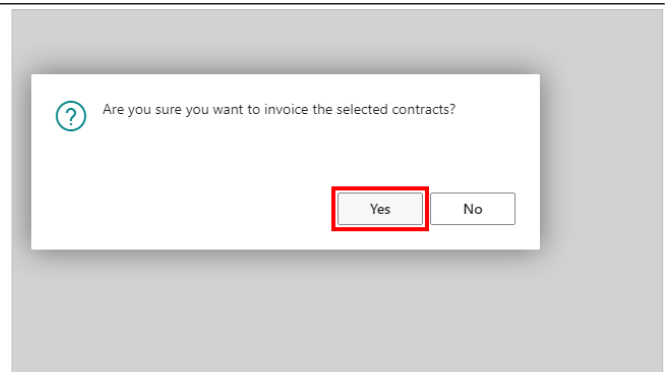
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Post Invoices...**



Click on the button **Yes**



3.15.Undo Rental Shipments

3.15.1. How to Undo Rental Unit Shipments

3.15.1.1. Overview

ODT Rentals provides the ability to undo a rental shipment prior to invoicing should an incorrect rental unit have been entered and shipped.

It is recommended that the Posting Date be the same date that was used when shipping the rental unit.

On the Rental Ledger Entries the field, Correction, will be checked on both the Rental and Return type records related to the contract Rental Line that the Undo Shipment was ran on.

When Rental Units are linked to Items, then the Item will be transferred back to the location it was transferred from. If the Item is an item that is stored in bins it will be transferred back to the bin it was transferred from. When the item is a serialized item, the item by serial no. will be transferred back to the location it was originally transferred from.

3.15.1.2. Steps to Undo a Rental Shipment

The following example demonstrates the creation of a Rental Contract containing a rental group with a quantity of 1 which was shipped, however, the rental unit shipped was accidentally the wrong unit.

And then demonstrates the running of the Undo Shipment function to return the incorrectly shipped rental unit.



Click on the navigation menu item **Rental Contract**

ons Intelligent Cloud Insights

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental	Create a new rental contract for rental product	

Click on the lookup button **Sell-to Customer Name**

Rental Contract

Contract Rental Actions Related Fewer options

General

Sell-to Customer Na... Rental Terms Code

Quote No. Review or update the value for Sell-to Customer Name

Posting Date Contract Total

Order Date Outstanding Amount

Document Date Advanced Proforma

Click on the link in cell **No.** with the value **10000**

Process Contract Rental Actions Related Fewer options

General

Sell-to Customer Na... Rental Terms C

No.↑	Name	Zif
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New

Click on the cell **Rental Unit No.**

Contracts Shipments Due Today 1

Overdue Sales Invoice Amount \$112,742

See more

External Document No.

Rental Lines Manage Line Functions

Rental Unit No.	Standard Text Code	Description

Sales Lines



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Shipments Due Today
1

Due Sales Invoice
112,742

External Document No.

Rental Lines	Manage	Line	Functions	Related
<div>Rental Unit No. <input type="text"/></div>		Standard Text Code	Description	
Sales Lines >				

Click on the link in cell **No.** with the value **RU00001**

RP00001	Mini Excavator with Vibrator Plate	<input type="checkbox"/>
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>
PG-001	Portable Generators	<input type="checkbox"/>
RU00007	16 G Brad Nailer	<input type="checkbox"/>
RU00026	Wacker Hammer Drill Bits 3/16 inch	<input type="checkbox"/>
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>
→ RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options	
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1 Ren Terr Cod
Buckeye Ditcher Group	MONTH-END	0		

Enter the text **1**.

Line	Functions	Related	Fewer options	
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1 Ren Terr Cod
Buckeye Ditcher Group	MONTH-END	1		



ODT Rentals Online Help

Click on the cell **Location Code**

actions Related Fewer options					
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Ren Terr Cod
Ditcher Group	MONTH-END	1			

Click on the lookup button in the cell **Location Code**

Related Fewer options					
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Ren Terr Cod
roup	MONTH-END	1			

Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Ren Terr Cod
Group	MONTH-END	1			

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the cell **Rental Unit No.**

Today

1

0

Overdue Sales Invoice Amount

\$112,742

> See more

External Document No. <div>

Sales Lines >



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows a 'Rental Lines' table with columns: Rental Unit No., Standard Text Code, and Description. The first row has 'RU00001' in the first column and 'Buckeye Ditcher Group' in the third. A red box highlights a three-dot menu icon (lookup button) in the second column of the first row. Below the table is a 'Sales Lines >' link.

Click on the link in cell **No.** with the value **RU00005**

The screenshot shows a list of rental units with columns: No., Description, and Group. The list includes: BD-006 (Buckeye Ditcher), RU00002 (Buckeye Ditcher), RU00003 (Buckeye Ditcher), RU00005 (Buckeye Ditcher), and SU (Sub Buckeye Ditcher). The 'RU00005' entry is highlighted with a red box.

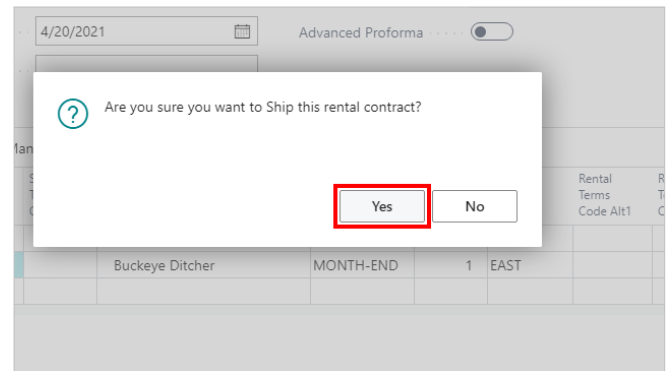
Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00029' screen. The 'Rental' tab in the top navigation bar is highlighted with a red box. Other tabs include 'Process', 'Contract', 'Actions', 'Related', and 'Fewer options'.

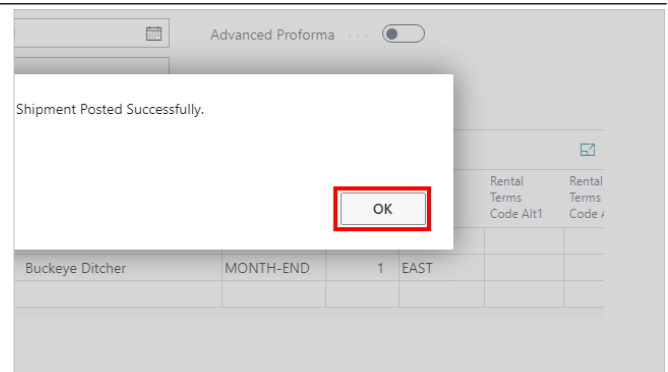
Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'Rental Contract · RC00029' screen. The 'Ship Rentals' option in the 'Actions' dropdown menu is highlighted with a red box. Other options include 'Return and Send...', 'Ship', 'Return Rentals', and 'Invoice'.

Click on the button **Yes**



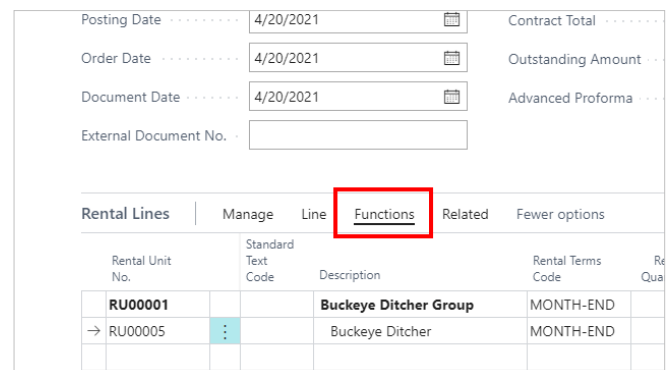
Click on the button **OK**



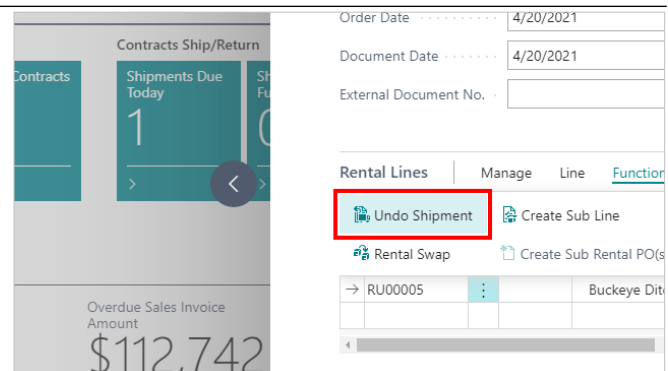
NOTE:

It is recommended that the Posting Date is the date on which the shipping of the rental unit(s) occurred. Verify the Posting Date is correct.

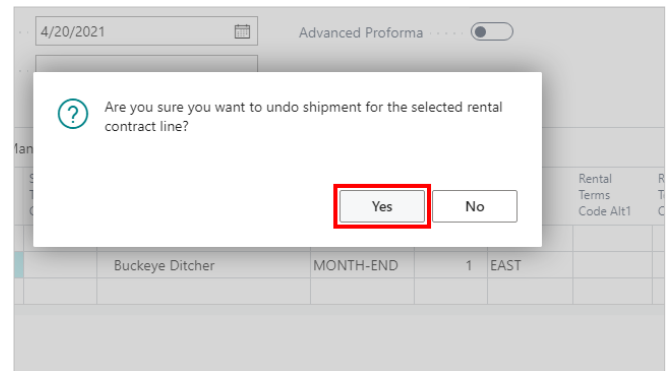
Click on the navigation menu item popup **Functions**



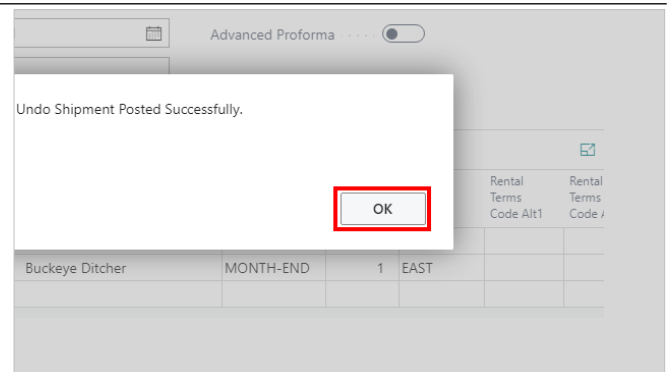
Click on the navigation menu item **Undo Shipment**



Click on the button **Yes**



Click on the button **OK**



Click on the cell **Qty. to Rent** with the value **1**

Note that the Qty. to Rent now has 1 and the Qty. on Rent has been reset to 0.

current view: []									
es | Manage | Line | Functions | Related | Fewer options									
Unit	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Disc	
01	0.00		SUPPLIES	0	0	0	0		
05	0.00		SUPPLIES	1	0	0	0		

3.15.1.3. Reviewing the Rental Ledger Entries

A review of the Rental Ledger Entries for the unit on which the Undo Shipment was ran should be done to confirm the entries related to the undoing of the shipment.

There will be 2 entries related to the undo. The initial "Rental" type entry and a "Return" type entry, both with the Correction field checked.

The following demonstrates the review of the Rental Ledger Entries.



Click on the cell **Rental Unit No.** with the value **RU00005**

External Document No.

Rental Lines	Manage	Line	Functions
Rental Unit No.	No. of Periods	Rental Return Date	Rent
RU00001		5/19/2021	5.0
→ RU00005		5/19/2021	5.0

Overdue Sales Invoice Amount
\$112,742
[See more](#)

Sales Lines >

Click on the navigation menu item popup **Line**

Posting Date 4/1/2018 Contract Total
Order Date 4/1/2018 Outstanding Am
Document Date 4/1/2018 Advanced Profo
External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stan... Text Code	Description	Rental Terms Code		
RU00001		Buckeye Ditcher Group	MONTH-END		
→ RU00005		Buckeye Ditcher	MONTH-END		

Click on the navigation menu item **Rental Ledger Entries**

Document Date 4/1/2018
External Document No.

Rental Lines	Manage	Line	Function
Rental Amount Lines		View Rental Calendar	
Rental Ledger Entries		Metered Usage Entries	
Rental Value Entries		Periodic Usage Entries	

Sales Lines >

There are 2 entries, one with an Entry Type of Rental which indicates the shipment of the unit and the other with an Entry Type of Return. Both entries have the Correction field checked, which indicates this was a reversal of the initial shipment.

Click on the cell **Correction** with the value **on**

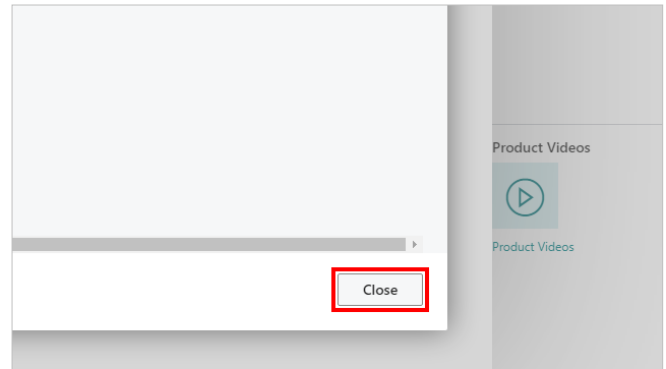
When undo shipment is ran the field, Correction will be checked on both the Rental and Return Type lines.

More options

Rental Doc. No. ↑	Rental Contract No.	Entry No.	Correction
RC00029	RC00029	94	<input checked="" type="checkbox"/>
RC00029	RC00029	95	<input checked="" type="checkbox"/>

New Payments Reports

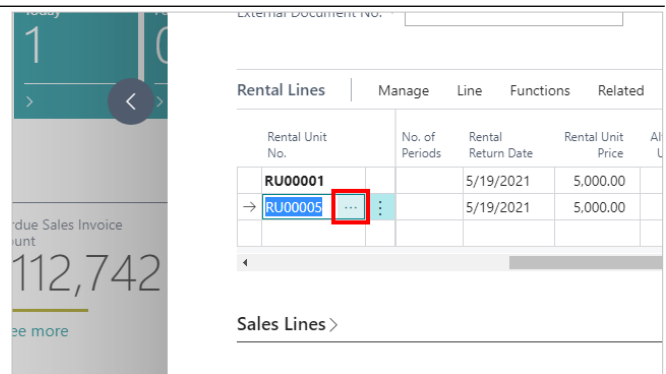
Click on the button **Close**



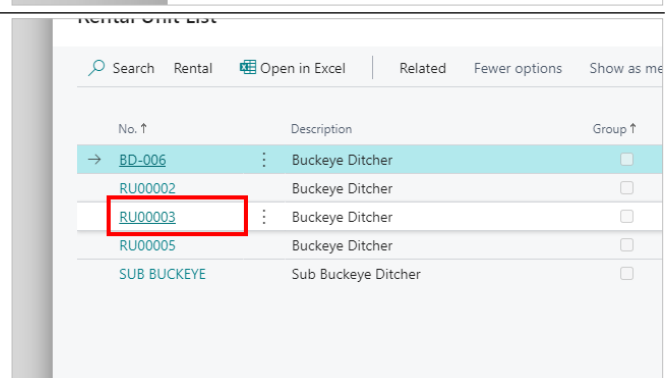
3.15.1.4. Revising the Rental Unit on the Rental Line

The following steps demonstrate the selection of the Rental Unit that should have been initially selected and the shipping of the unit.

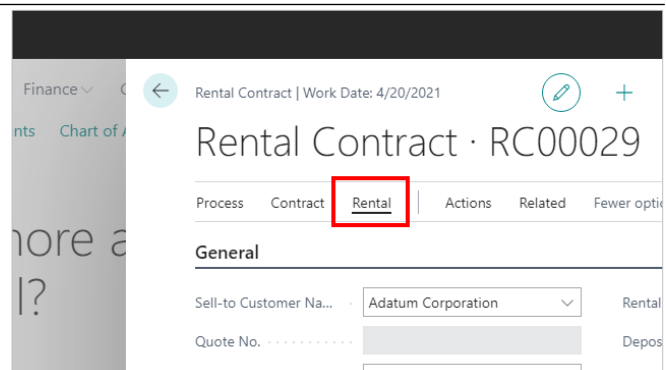
Click on the lookup button in the cell **Rental Unit No.**



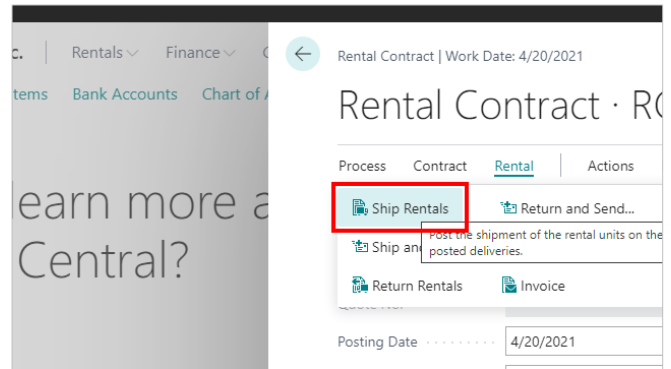
Click on the link in cell **No.** with the value **RU00003**



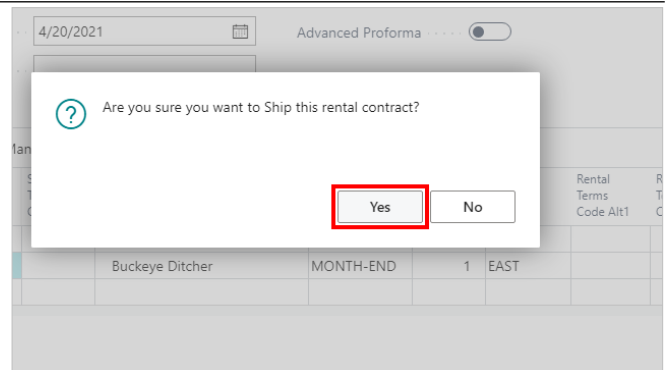
Click on the navigation menu item popup **Rental**



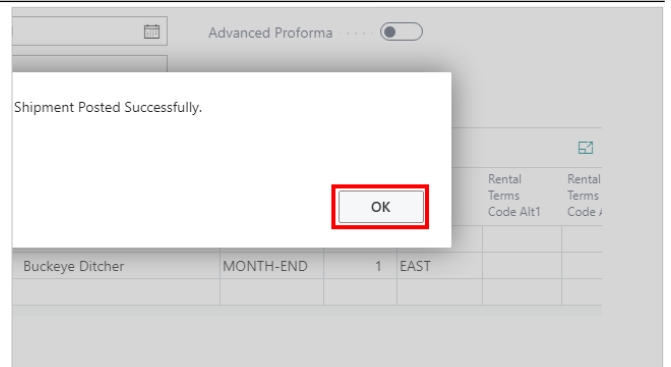
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



3.16. Pending Shipments and Returns

3.16.1. Pending Shipments and Returns Overview

3.16.1.1. Overview

For most rental companies, the next step after creating a rental contract is for the warehouse or yard personnel to identify the orders needing to be shipped or returned.

The Global Pending Shipments and Returns feature enables users to view listings of pending Shipments and Returns by Rental Contract and by Rental Unit. This can be done directly from the Business Manager and Sales Order Processor profiles. The cues are split into two categories, Contracts Ship/Return and Units Ship/Return.

Activities						
Rental Activities						
RENTAL		CONTRACTS SHIP/RETURN			UNITS SHIP/RETURN	
RENTAL QUOT... OPEN	RENTAL CONT... OPEN -	SHIPMENTS D... TODAY	SHIPMENTS - FUTURE	RETURNS	TO SHIP	TO RETURN
0	4	1	0	1	1	1
>	>	>	>	>	>	>

The Contracts Ship/Return category contains cues for Shipments Due Today, Shipments – Future and Returns. Each of these cues provides users with the number of Rental Contract that have units awaiting shipment or returns.

The cues, when selected, provide lists of Rental Contracts, where there are units to be shipped or returned. Users can access contract line details from a selected contract in the listing.

From the Shipments Due Today and Shipments – Future, warehouse or yard personnel are able to print a Pick List for a single or multiple contracts. The Pick List prints individual pick tickets for each contract, where the personnel can note the rental unit selected and add a signature, the date picked and a reviewer's signature.

From the Returns cue, warehouse or yard personnel are able to review a list of contracts and open the contracts to view the details related to units that are on rent and expected to be returned.

The Units Ship/Return category contains cues of To Ship and To Return that display the number of units, which are either yet to be shipped or to be returned. The Rental Contract can be opened by clicking on the Document number of the contract to be opened.

From the To Ship cue, warehouse or yard personnel are able to print a Pick List of units to be shipped, enter and ship the units. The Pick List prints a listing of units to be shipped grouped by Rental Contract. Personnel can note the rental unit selected and add a signature, the date picked and a reviewer's signature at the end of the list.

To learn about processing shipments from the To Ship, see [How to Process Shipments from the To Ship Cue](#).

The document includes processing shipments for Rental Units, Rental Units linked to Serialized Items, partial shipments, partial shipments for Rental Units linked to Serialized Items, and partial shipments for Rental Units linked to Items stored in Bins.

From the To Return cue, warehouse or yard personnel are able to review a list of units which are out on rent, and process the return of units to the same, a different or a temporary rental location. Partial returns can be processed from the To Return list.

To learn about processing returns from the To Return, see [How to Process Returns from the To Return Cue](#).

To learn about processing returns to a different or temporary location, see [ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location](#).

The document includes processing returns for Rental Units, Rental Units linked to Serialized Items, partial returns, partial returns for Rental Units linked to Serialized Items, and partial returns for Rental Units linked to Items stored in Bins.

To accommodate situations where shipment of units is required ahead of the rental starting date, additional fields for Required Shipping Date and Shipment Date are available and can be displayed on the list lines, the quote and contract rental lines.

For the situation where the Customer is picking up the rental, an additional field for Customer Pickup is available to add to the list lines and rental lines.

These fields are displayed by default on the To Ship list.

For information on the fields and ribbon options on the lists provided by the cues, point to the column name or ribbon option.

3.16.1.2. How to Add Rental Line Fields for Pending Shipments

To add fields to the Rental Lines of the Rental Quote and Rental Contract, a quote or contract must be opened. To add fields to the To Ship or To Return list rental lines, the list must be open.

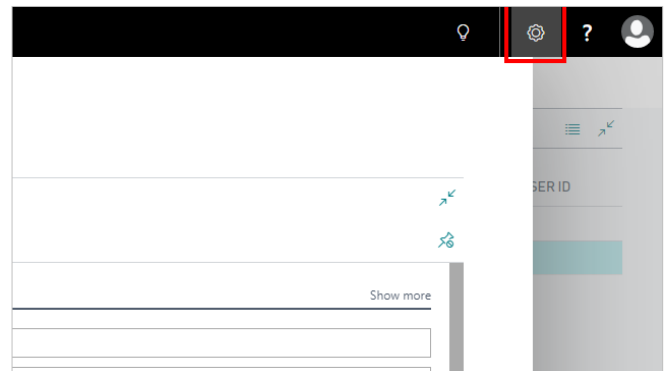
On the To Ship list it is recommended to add the Location Code and Bin Code, if units are linked to Items stored in Bins.

On the To Return list, if units may be returned to different rental locations, then add the Location Code, Return Location Code and Return Temporary Location fields. When units are linked to Items stored in Bins and may be returned to a different Bin, then add the Return Bin Code field.

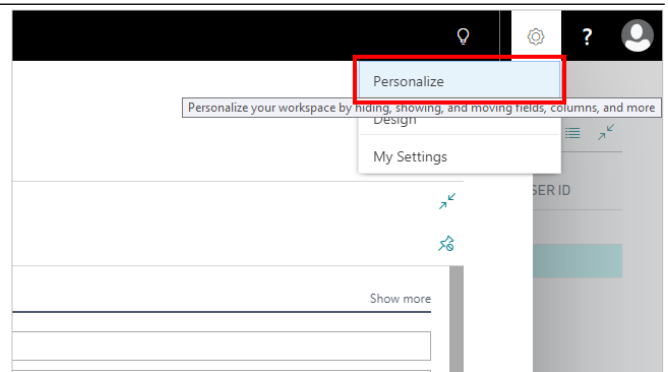
The following demonstrates the adding of some fields to a rental contract rental line.

The same steps can be used from the To Ship and To Return lists to add fields to the lines.

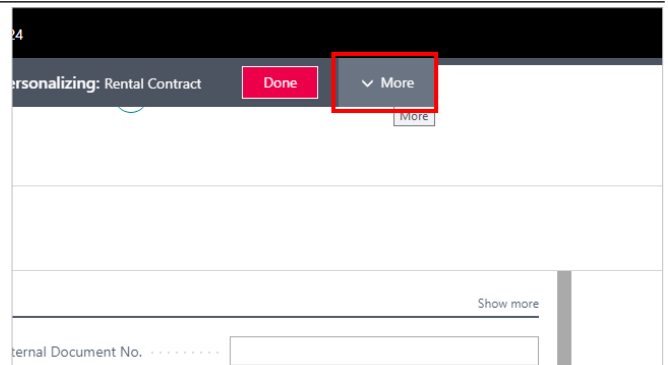
Click on the link **Settings**



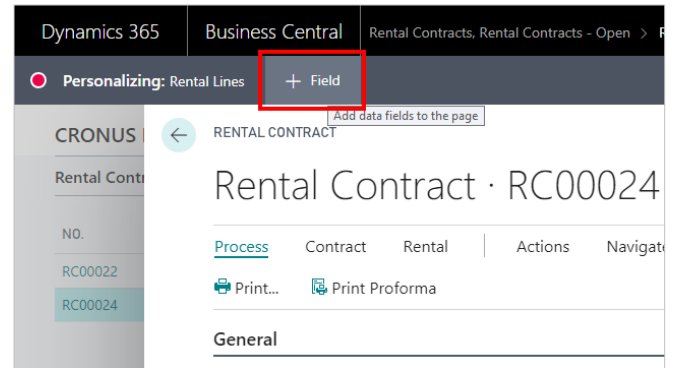
Click on the menu item **Personalize**



Click on the link **More**

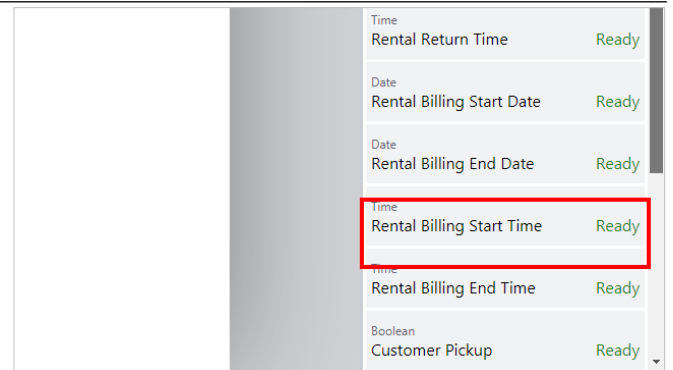


Click on the link **Field**



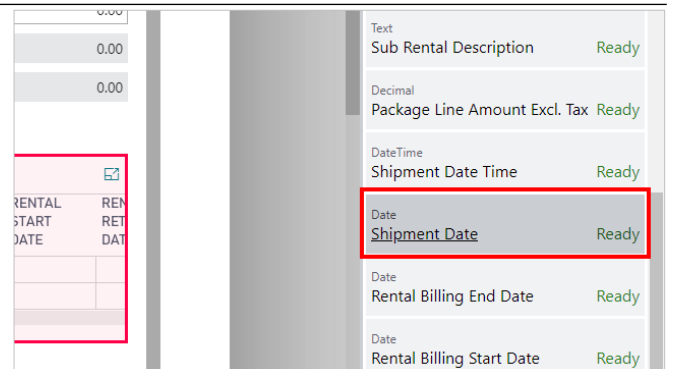
Click and hold the left mouse button on the data brick
Caption = Required Shipping Date

Drag and drop the field to the location on the rental
line where it is to be displayed.



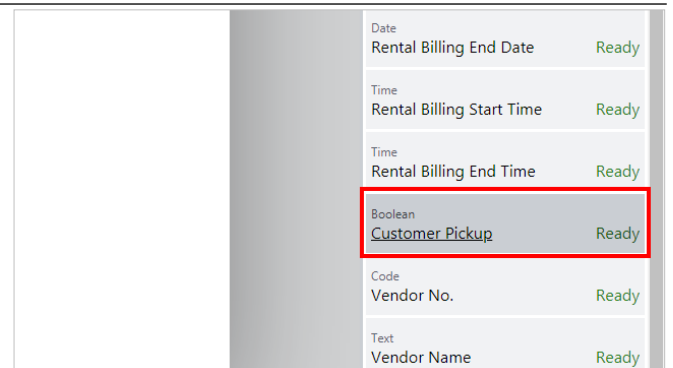
Click on the data brick **Caption = Shipment Date**

Drag and drop the field to the location on the rental
line where it is to be displayed.



Click and hold the left mouse button on the data brick
Caption = Customer Pickup

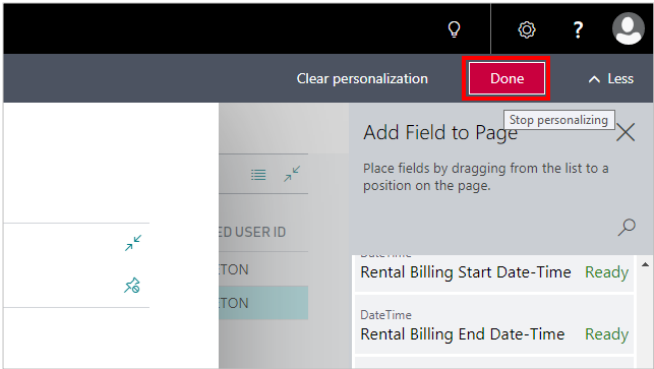
Drag and drop the field to the location on the rental
line where it is to be displayed.



The fields can be resized by moving the thick red line in the direction desired. Left to reduce the width of the field and right to expand the width of the field.



Click on the link **Done**



3.16.2. **How to Process Shipments from the To Ship Cue**

3.16.2.1. **Overview**

The following examples demonstrate the creation of a Rental Contract, the running of the Pick Tickets, and multiple scenarios for processing shipments from the To Ship list.

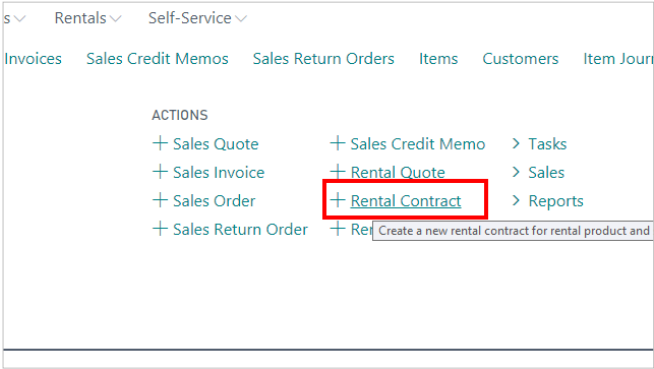
The examples provided here include processing full shipments and partial shipments from the To Ship cue.

For additional information on partial shipments and partial returns, see ODT Rental Online Help, Processing Rentals, Partial Shipments and Returns.

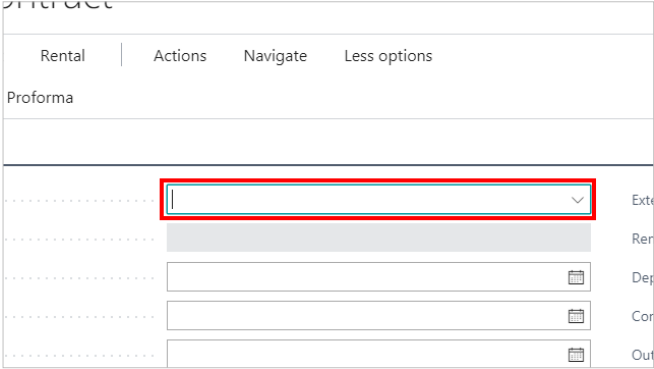
3.16.2.2. **How to Enter a Rental Contract with an Early Shipment Date**

The following steps demonstrate the creation of a rental contract, and the entry of the Rental Lines, including the new fields of Required Shipping Date and Customer Pickup.

Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**





ODT Rentals Online Help

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Print... Print Proforma

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Rental Lines | [Manage](#) | More options + New

Click on the cell **Rental Unit No.**

Rental Lines | [Manage](#) | More options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | [Manage](#)

Click on **No. = RU00001**, **Description = Buckeye Ditcher Group**

UNIT NO. TEXT CODE DESCRIPTION

NO.	DESCRIPTION
PG-001	Portable Generators
RU00013	16 G Brad Nailers
BD-006	Buckeye Ditcher
RU00001	Buckeye Ditcher Group
RU00003	Buckeye Ditcher
RU00003	Buckeye Ditcher

+ New

Click on the cell **Rental Quantity**

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PEND	0		

UNIT OF



Enter the text 1.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Buckeye Ditcher Group	MONTH-PEND			

UNIT OF

Click on the cell **Location Code**

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
Buckeye Ditcher Group	MONTH-PEND					4/

UNIT OF

Click on **Code = EAST, Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-PEND	1			4/9/2018

CODE	NAME
EAST	East Warehouse
RENTRESERV	Inventory Items Res
Select record "EAST"	
WEST	West Warehouse

LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	

Click on the column header **Customer Pickup**

If the Customer will be picking up the unit, then check the Customer Pickup box.

When this field is checked, then the Pick Ticket will reflect this, and the warehouse or yard personnel will know the Customer will be picking up the unit.

If the unit is not specified on the rental line, the unit will still need to be picked.

ding Amount

Customer Pickup
Specifies whether the customer will pick up the rental unit.
Press Ctrl+F1 to learn more

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CUSTOMER PICKUP	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENT UNIT PR
	4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00	
	4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00	



ODT Rentals Online Help

Press the **Arrow down** key.

Upon moving off the group line, the child unit line(s) are automatically created based on the Rental Quantity entered.

ding Amount							
1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI REN UNIT PR
		4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00	
				<input type="checkbox"/>			

Click on the cell **Rental Start Date**

The Rental Start Date is automatically populated with the Order Date from the General tab.

In this example, the rental is to commence 4 days later.

Therefore, the Rental Start Date must be changed.

Changing the date on the group line will automatically update all related child lines, when moving off the group line.

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE
EAST			4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018
EAST			4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018

Click on the link in cell **Rental Start Date**

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE
EAST			4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018
EAST			4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018

Click on a date in the calendar

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	START DATE	SHIPPING DATE	CU... PIC...	RETURN DATE	RENTAL UNIT PRICE
		4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00
					5/8/2018	500.00

April 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Today Done

UNIT PRICE EXCL. TAX	TAX GROUP CODE	EXCL. TAX	TAX	LINE DISCOUNT %	QTY. TO SHIP
0.00	*	0.00	0.00	0	0



ODT Rentals Online Help

Click on the cell **Required Shipping Date**

The date in the Required Shipping Date field is automatically populated with the Rental Start Date when the line is entered.

When shipping is to occur before the Rental Start Date, then the date must be changed to the date that the shipment must occur on.

This date field is used in populating the Contract - Pending Shipments Cue.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE
		4/20/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00
		4/9/2018	4/9/2018	<input type="checkbox"/>	Type the date in the format M/d/yyyy	500.00
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Click on the link in cell **Required Shipping Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE
		4/20/2018	4/20/2018	<input type="checkbox"/>	5/8/2018	500.00
		4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00
				<input type="checkbox"/>		
				<input type="checkbox"/>		

Click on a date in the calendar

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE
		4/20/2018	4/20/2018	<input type="checkbox"/>	5/8/2018	500.00
		4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00
				<input type="checkbox"/>		
				<input type="checkbox"/>		

April 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Today Done

PRICE L. TAX	TAX GROUP CODE	LIN AMOUNT EXCL. TAX	TAX	DISCOUNT %	QTY. TO SHIP	QTY.
0.00	*	0.00	0.00	0	0	

Click on the cell **Rental Return Date**

Review and change the Rental Return Date, as the defaulted date is calculated from the initial Rental Start Date and is based on the rental period on the term selected on the line.

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
	4/20/2018	4/18/2018	<input type="checkbox"/>	5/8/2018	500.00	0.00
	4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	Type the date in the format M/d/yyyy	0.00
			<input type="checkbox"/>			
			<input type="checkbox"/>			



ODT Rentals Online Help

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT2	RENTAL START DATE	REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT RENTAL UNIT PRICE
	4/20/2018	4/18/2018	<input type="checkbox"/>	5/8/2018	500.00	0.00
	4/9/2018	4/9/2018	<input type="checkbox"/>	5/8/2018	500.00	0.00
			<input type="checkbox"/>			
			<input type="checkbox"/>			

Click on a date in the calendar

The date changes made on the group line will update the child unit lines, when moving off the group line.

REQUIRED SHIPPING DATE	CU... PIC...	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT RENTAL UNIT PRICE
4/18/2018	<input type="checkbox"/>	5/8/2018	500.00	0.00
4/9/2018	<input type="checkbox"/>			0.00
	<input type="checkbox"/>			
	<input type="checkbox"/>			

May 2018

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Today Done

LINE UNIT TAX	AMOUNT INCLUDING TAX	LINE DISCOUNT %	QTY. TO SHIP	QUANTITY SHIPPED
0.00	0.00	0	0	0

As the Pending Shipments cues are filtered based on the Shipment Date on the Shipping Tab, this date is to be set to the earliest Required Shipping Date entered on the Rental Lines.

Click on **Shipping**

Shipping >

Invoice Details >

Click on the field **Shipment Date**

Atlanta

GA

31772

4/9/2018

Type the date in the format M/d/yyyy



Click on the link

Atlanta

GA

31772

4/9/2018

Select a date

Click on a date in the calendar

April 2018

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

City

Date

P Code

Date

Today Done

4/9/2018

For this Contract - Pending Shipment example, the unit to be shipped is being left to the warehouse or yard personnel to determine the unit to ship on this contract.

When the Pick Ticket is provided to the user, who will update the To Ship line, the user will enter the selected unit to be rented out by looking up the unit in the Rental Unit No. field on the To Ship line. The shipment of the unit can be posted from either the To Ship list or from the rental contract.

Therefore, until the picking is done the child line, Rental Unit No. field is being left blank.

This is not mandatory.

The unit can be selected, which will print on the Pick Ticket, so the warehouse or yard personnel know what unit to pick.

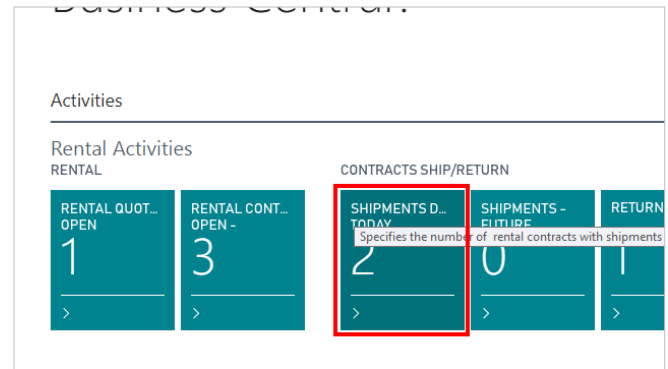
3.16.2.3. How to Generate Pick Tickets from Shipments Due Today

The listing in the Shipments Due Today is filtered based on the users Work Date, which is set in My Settings. All contracts that have a Shipment Date on the Shipping tab outstanding on that work date or earlier than the work date will be displayed.

This example demonstrated the printing of the Pick list from the Shipments Due Today.

The following steps apply as well to printing the Pick List from the Shipments - Future, which displays all contacts with pending shipments, which are after the users work date.

Click on the link **Shipments DueToday**



Multiple contracts can be selected using a variety of methods.

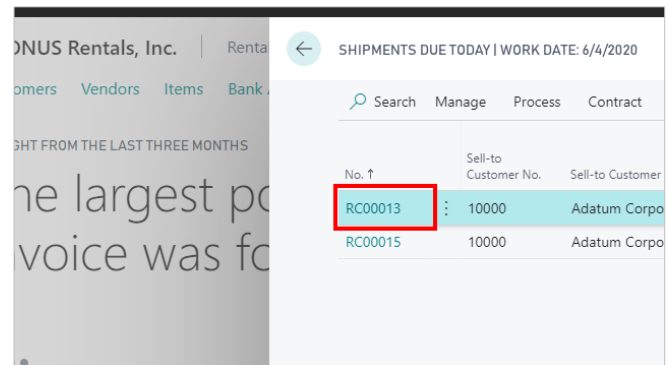
- By using the Select More option provided in Dynamics 365 Business Central.
- By using keyboard keys the same as in excel.

For example, to select a range of contract, then click on the first contract to be included, press and hold the Shift key, and then select the last contract to be included.

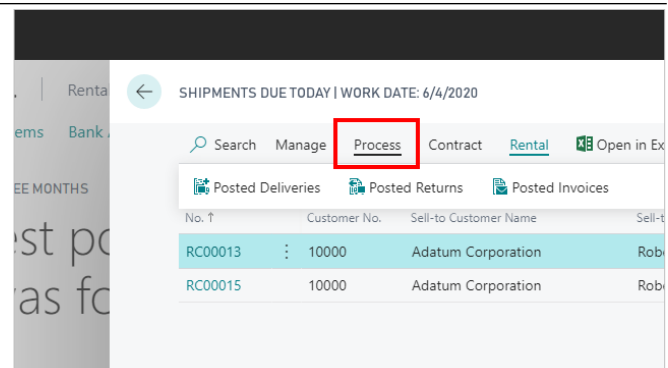
Or if the contracts to be included are not consecutive, then after clicking on the first contract, press and hold the Ctrl key down, and then select the additional contracts to be included on the Pick List.

When only one contract is selected, then on the report request page, the No. field will be displayed and populated with the contract number that the cursor is on.

Click on the cell **No.** with the value **RC00013**

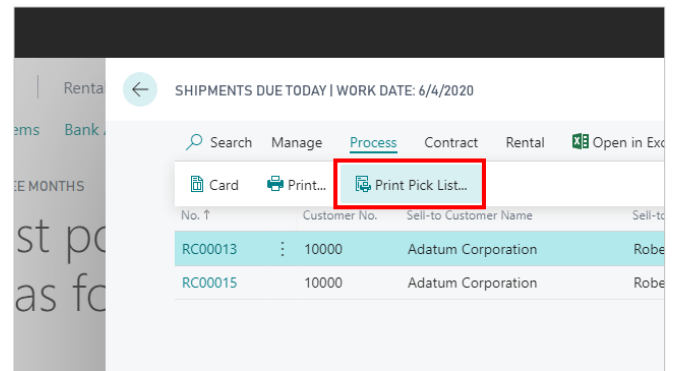


Click on the navigation menu item popup **Process**



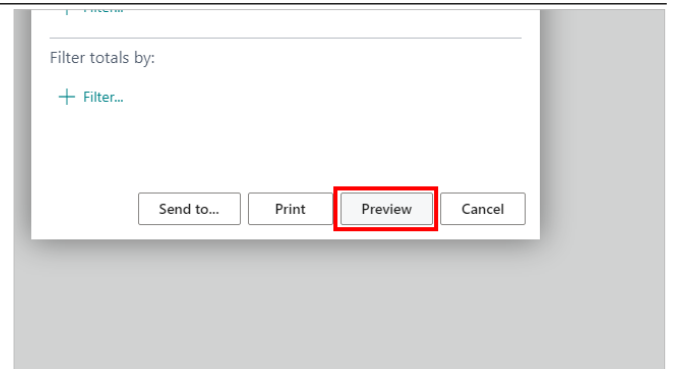


Click on the navigation menu item **Print Pick List...**



Click on the button **Preview**

The Picklist provides the ability to print the report using Send To, Print and Preview.



Pick Ticket Information: The header of the Pick Ticket includes the Rental Contract Number, Rental Contract Date, Sell To and Ship-To customer information, Customer ID, Salesperson, External Document No., and contact information.

The body of the ticket can include two sections, Rental and Sales. The Sales section only prints when Sales Lines are populated on the contract.

Rental Contract Pick List							
Rental Contract Number: RC00013							
Rental Contract Date: 6/4/2020							
Sell To: Adatum Corporation		Ship To: Adatum Corporation		Customer ID: 10000		SalesPerson: Peter Saddow	
Robert Townes		Robert Townes		External Doc. No.:			
192 Market Square		192 Market Square		Contact Name: Robert Townes			
GA 31772		GA 31772		Contact E-Mail: robert.townes@contoso.com			
Contact Phone:							
Rental:							
Type	Unit	Group No.	Description	Bin	Qty to Ship	Qty Shipped	Customer Pickup
Item	RU00026		Wacker Hammer Drill Bits 3/16 inch	C-001	2		No
Required Shipping Date: 6/4/2020							
Sales:							
Type	No.	Description	Bin	Qty to Ship	Qty Shipped	Customer Pickup	Required Shipping Date
Item	1896-5	ATHENS Desk		1		No	
Picker Name: _____				Date Picked: _____			
Reviewer Name: _____							

Rental Section:

- Type:** The Type field will display the Link Type, when the unit is linked to a master record, such as an Item or Fixed Asset.



- **Unit:** When the unit has been selected on the rental lines, then this field will be populated. This advised the picker what unit to pick. If the unit was not selected, then the picker will need to select the unit to be shipped and note the Rental Unit No. on the ticket.
- **Group No.:** If the rental unit lines in the contract are child lines of a group, then the Group No. field will be populated with the Group No. This will aid the warehouse/yard personnel in picking units when they have not been selected on the rental lines.
- **Description:** Prints the description of the unit or unit group if the unit was not selected.
- **Bin Code:** When a Rental Unit is linked to an Item that is stored in Bins, then the Bin Code from the line will be displayed.
- **Qty. to Ship:** This quantity is defaulted from the "Qty. to Rent" field on the rental line for the unit.
- **Qty. Shipped:** This quantity is defaulted from the "Qty. on Rent" field on the rental line for the unit.
- **Customer Pickup:** When on the rental line the field Customer Pickup is checked, then Yes will print on the ticket. If the field is not checked, then No will print on the ticket.
- **Required Shipping Date:** Prints the Required Shipping Date specified on the rental line.

Sale Section:

- **Type:** The Type field will display the Type selected on the Sales Line.
- **No.:** Prints the number of the product entered on the Sales Line.
- **Description:** Prints the description of the product selected on the Sales Line.
- **Qty. to Ship:** This quantity is defaulted from the "Qty. to Ship" field on the Sales Line.
- **Qty. Shipped:** This quantity is defaulted from the "Qty. Shipped" field on the Sale Line.
- **Customer Pickup:** This field prints as Yes or No, depending on the setting on the applicable line.
- **Required Shipping Date:** This field prints the date specified on the applicable line.

Footer Section:

- Picker Name field where the picker is to sign.
- Date Picker field, which the Picker is to populate the date.
- Reviewer Name field, where the reviewer is to sign.

3.16.2.4.

How to Generate a Pick List from Units - To Ship

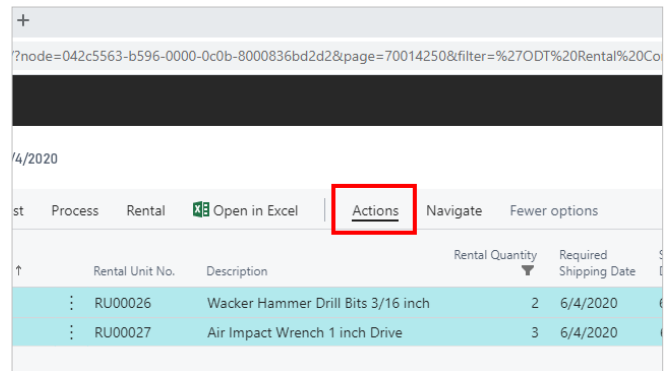
Click on the link **To Ship**

SHIP/RETURN		UNITS SHIP/RETURN	
SHIPMENTS - FUTURE	RETURNS	TO SHIP	TO RETURN
0	1	2	1
>	>	>	>

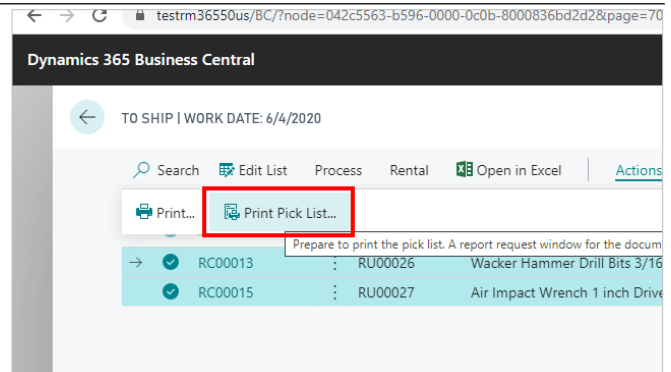
Specifies the number of rental shipments that are waiting

Select the records which are to be included on the Pick List.

Click on the navigation menu item popup **Actions**

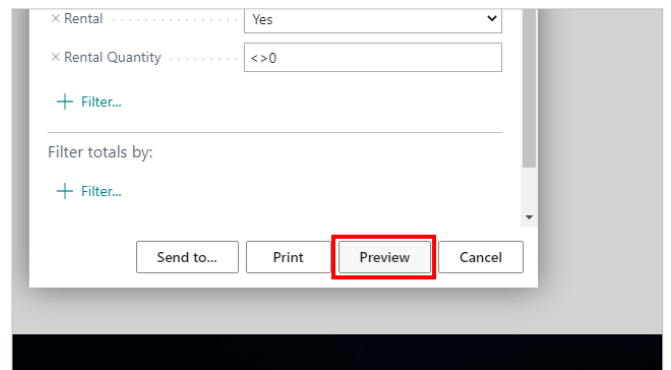


Click on the navigation menu item **Print Pick List...**



Select the desired method of printing. The options are the same as noted for printing the Pick Tickets from Shipments Due Today.

Click on the button **Preview**



The Pick List contains the same fields in the body and footer of the Pick Tickets from the Contracts - Shipments Due Today. The following picture is an example of the Unit - To Ship Pick List, with the units grouped by Rental Contract.



Rental Contract Pick List

Rental Contract Number: RC00013

Rental Contract Date: 6/4/2020

Rental:

Type	Unit	Group No.	Description	Bin	Qty to Ship	Qty Shipped	Customer Pickup	Required Shipping Date
Item	RU00026		Wacker Hammer Drill Bits 3/16 inch	C-001	2		No	6/4/2020

Rental Contract Number: RC00015

Rental Contract Date: 6/4/2020

Rental:

Type	Unit	Group No.	Description	Bin	Qty to Ship	Qty Shipped	Customer Pickup	Required Shipping Date
Item	RU00027		Air Impact Wrench 1 Inch Drive		3		No	6/4/2020

Picker Name:

Reviewer Name:

Date Picked:

3.16.2.5. Processing Shipments from the To Ship List

When the picking has been completed and the ticket has been signed, the entry and shipping of the units can be completed from the To Ship cue list or be provided to a user who would enter and ship the unit from the rental contract.

To learn about shipping from a rental contract, see the ODT Rentals Online Help, Processing Rentals, Rental Contracts.

The following demonstrates the entry of a unit and the subsequent shipping from the To Ship list.

Click on the link **To Ship**

SHIP/RETURN

SHIPMENTS - FUTURE

0

>

RETURNS

0

>

UNITS SHIP/RETURN

TO SHIP

2

>

TO RETURN

0

>

Specifies the number of rental shipments that are w

Click on the navigation menu item **Edit List**

Dynamics 365 Business Central

←

TO SHIP | WORK DATE: 4/9/2018

Search

Edit List

Rental

Open in Excel

Action

Make changes on the page.

DOCUMENT NO.↑

RENTAL UNIT NO.

DESCRIPTION

RC00025		Buckeye Ditcher Grou
RC00026	BD-006	Buckeye Ditcher



Click on the cell **Rental Unit No.**

DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00025		Buckeye Ditcher Group
RC00026	BD-006	Buckeye Ditcher

Click on the lookup button in the cell **Rental Unit No.**

DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00025		Buckeye Ditcher Group
RC00026	BD-006	Buckeye Ditcher

Click on the link in cell **No.** with the value **RU00002**

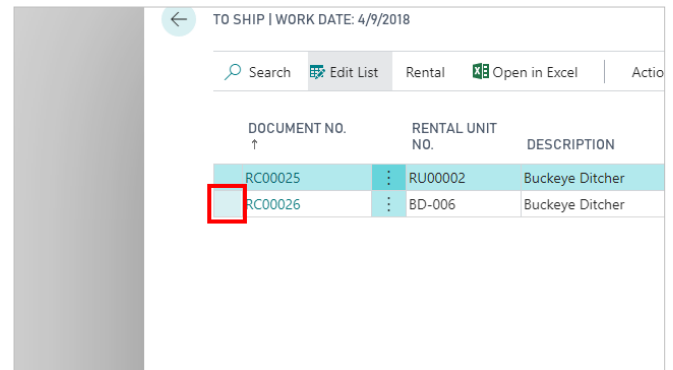
NO. ↑	DESCRIPTION
BD-006	Buckeye Ditcher
RU00002	Buckeye Ditcher
RU00003	Buckeye Ditcher
RU00005	Buckeye Ditcher
SUB BUCKEYE	Sub Buckeye Ditcher

Click on **Document No. = RC00025**, **Rental Unit No. = RU00002**, **Description = Buckeye Ditcher**

DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher

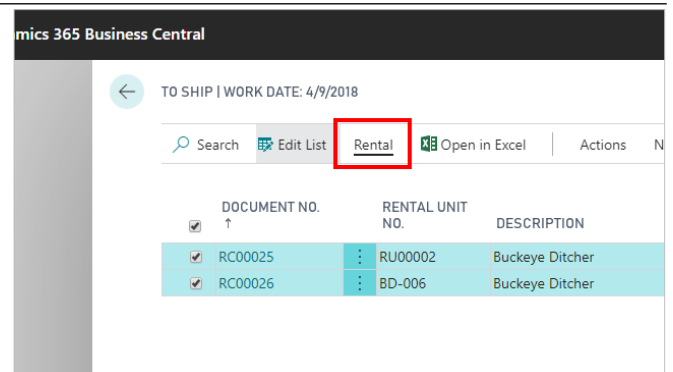
Press and hold the **Shift** key down.

Click on **Document No. = RC00026, Rental Unit No. = BD-006, Description = Buckeye Ditcher**



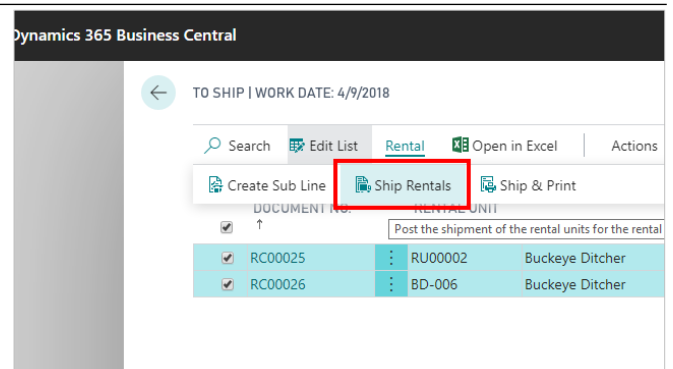
DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher

Click on the navigation menu item popup **Rental**



DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher

Click on the navigation menu item **Ship Rentals**

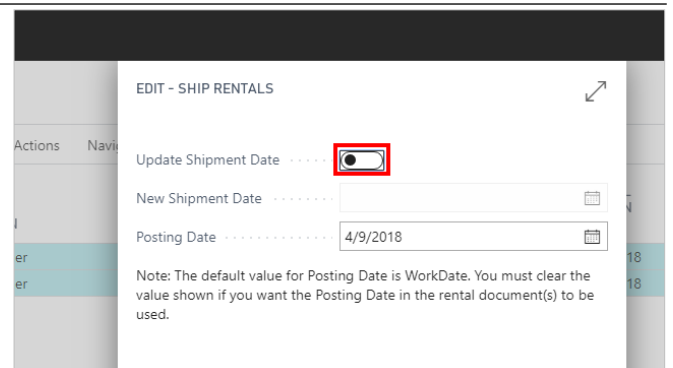


DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher

Click on the toggle field Update Shipment Date

When the actual shipment date differs from the Shipment Date on the record, then enable the Update Shipment Date.

Otherwise, do not enable the field.



EDIT - SHIP RENTALS

Update Shipment Date ☒

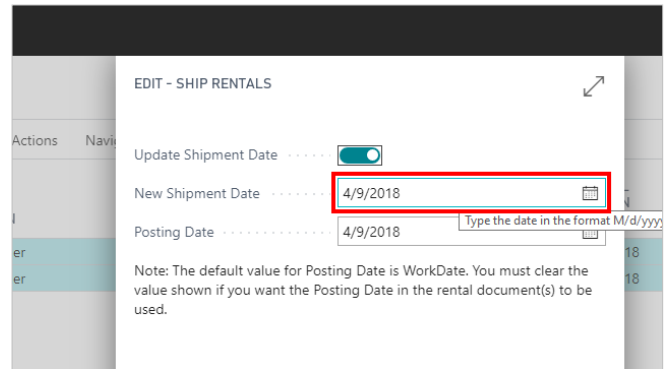
New Shipment Date

Posting Date 4/9/2018

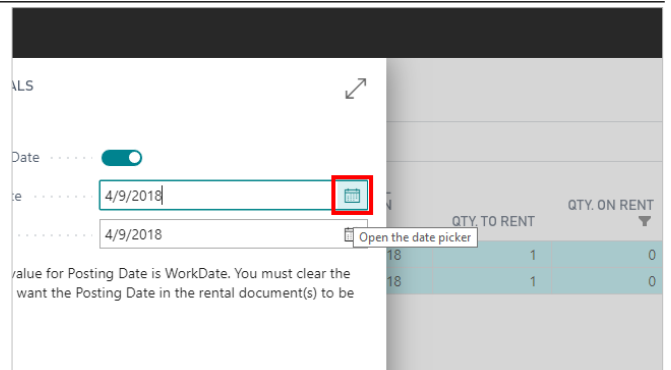
Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

In this example, the actual shipment date differs from the line and the following demonstrates the process for recording the New Shipment Date.

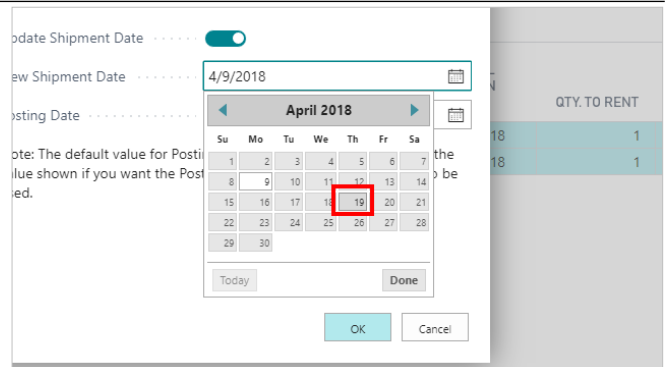
Click on the field **New Shipment Date**



Click on the link **Open the date picker**



Click on a date in the calendar



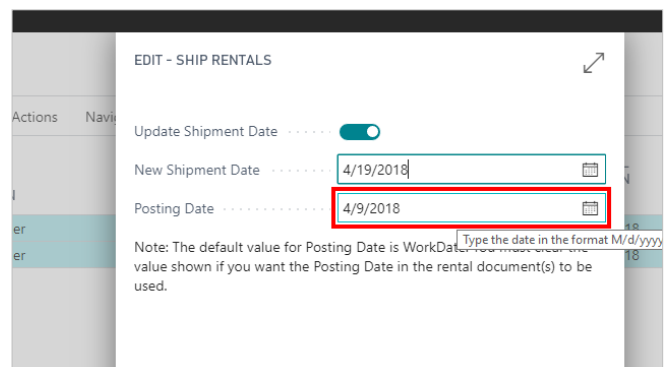
NOTE

When the term on any of the selected records contain records which have the setting of Tracking Date and Time, then an additional field New Shipment Time will be displayed for the entry of the actual time the shipment occurred on.

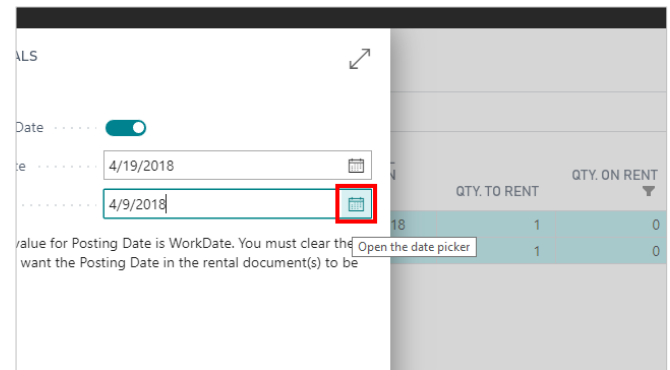
The New Shipment Time field is not displayed, when all the selected records have terms which have the setting of Tracking Date Only.

Click on the field **Posting Date**

Enter or lookup and select the date on which the shipment is to be posted.



Click on the link **Open the date picker**



ALS

Date ☐

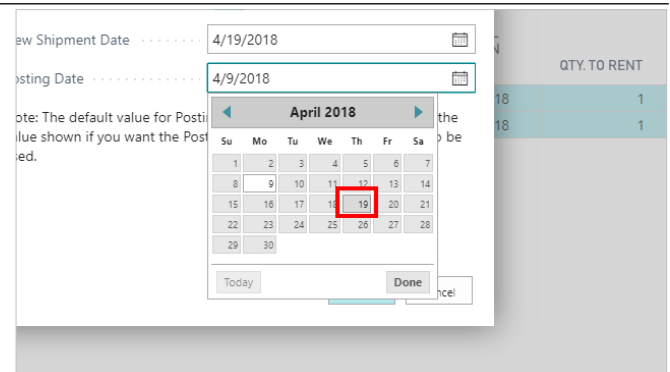
4/19/2018

4/9/2018

value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be

Open the date picker

Click on a date in the calendar



New Shipment Date

Posting Date

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

April 2018

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7

8 9 10 11 12 13 14

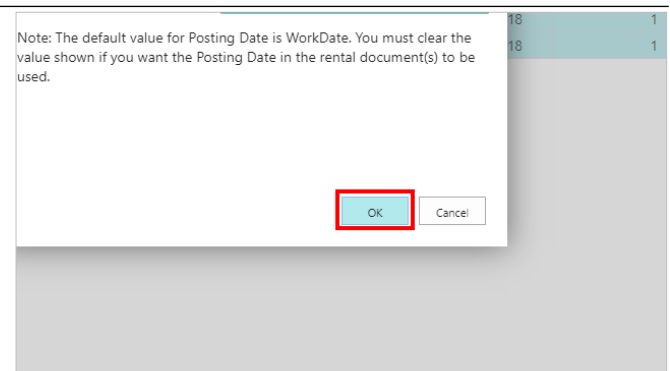
15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30

Today Done

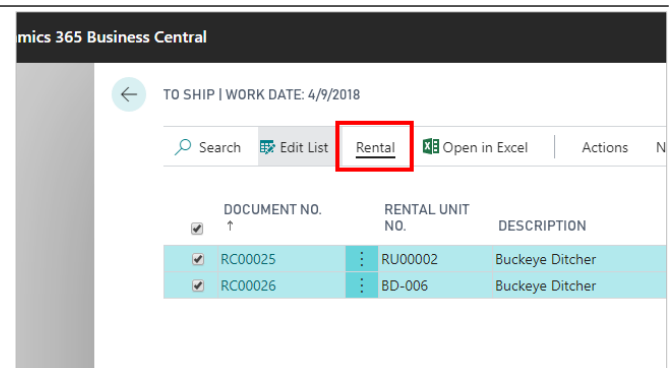
Click on the button **OK**



Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

Click on the navigation menu item popup **Rental**



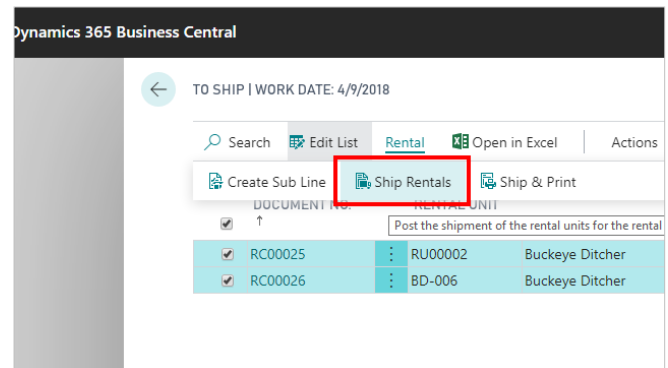
mics 365 Business Central

← TO SHIP | WORK DATE: 4/9/2018

Search Edit List Rental Open in Excel Actions

DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher

Click on the navigation menu item **Ship Rentals**



Dynamics 365 Business Central

TO SHIP | WORK DATE: 4/9/2018

Search Edit List Rental Open in Excel Actions

Create Sub Line Ship Rentals Ship & Print

DOCUMENT NO. RENTAL UNIT

RC00025 RU00002 Buckeye Ditcher

RC00026 BD-006 Buckeye Ditcher

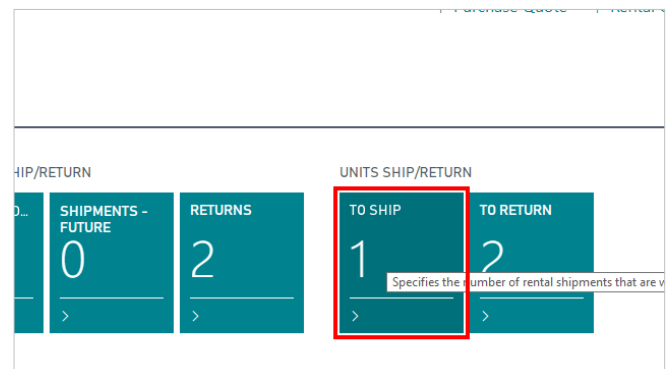
3.16.2.6. Processing Partial Shipments from the To Ship List

When a contract contains a Rental Unit record with a quantity greater than 1, then a partial shipment can be processed.

An example would be a unit linked to an item with a quantity of 4, and on the Required Shipping Date there are only 2 available to be shipped. The remaining quantity of 2 to be shipped on the following day.

The following demonstrates the partial shipment and subsequent shipment.

Click on the link **To Ship 1**



SHIP/RETURN

SHIPMENTS - FUTURE RETURNS

0 2

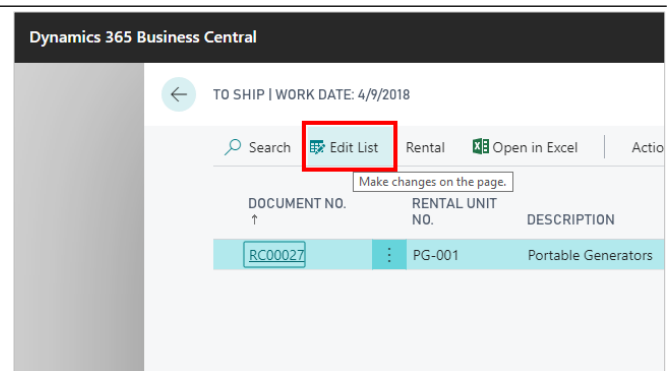
UNITS SHIP/RETURN

TO SHIP TO RETURN

1 2

Specifies the number of rental shipments that are v

Click on the navigation menu item **Edit List**



Dynamics 365 Business Central

TO SHIP | WORK DATE: 4/9/2018

Search Edit List Rental Open in Excel Action

Make changes on the page.

DOCUMENT NO. RENTAL UNIT NO. DESCRIPTION

RC00027 PG-001 Portable Generators

Click on the cell **Qty. to Rent** with the value 4

SHIPMENT DATE	RENTAL START DATE	RENTAL RETURN DATE	QTY. TO RENT	QTY. ON RENT	QTY. RETU
4/18/2018	4/20/2018	5/19/2018	4	0	



ODT Rentals Online Help

Enter the text **2**. Press the **Enter** key.

SHIPMENT DATE	RENTAL START DATE	RENTAL RETURN DATE	QTY. TO RENT	QTY. ON RENT ▼	QTY. RETN
4/18/2018	4/20/2018	5/19/2018	2	0	

Click on the button **Yes**

?

A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1000, linked to Rental Unit PG-001. Do you want to continue?

Yes No

Click on the cell **Qty. to Rent** with the value **2**

SHIPMENT DATE	RENTAL START DATE	RENTAL RETURN DATE	QTY. TO RENT	QTY. ON RENT ▼	QTY. RETN
4/18/2018	4/20/2018	5/19/2018	2	0	
4/18/2018	4/20/2018	5/19/2018	2	0	

Enter the text **0**.

It is recommended to set the Qty. To Rent to 0 on the newly created record, which is not being shipped on the Required Shipping Date.

SHIPMENT DATE	RENTAL START DATE	RENTAL RETURN DATE	QTY. TO RENT	QTY. ON RENT ▼	QTY. RETN
4/18/2018	4/20/2018	5/19/2018	2	0	
4/18/2018	4/20/2018	5/19/2018	0	0	



Click on **Document No. = RC00027**

← TO SHIP | WORK DATE: 4/9/2018		
Search Edit List Rental Open in Excel Actions		
DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00027	PG-001	Portable Generators
RC00027	PG-001	Portable Generators

Click on the navigation menu item popup **Rental**

← TO SHIP | WORK DATE: 4/9/2018		
Search Edit List Rental Open in Excel Actions		
DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00027	PG-001	Portable Generators

Click on the navigation menu item **Ship Rentals**

← TO SHIP | WORK DATE: 4/9/2018		
Search Edit List Rental Open in Excel Actions		
Create Sub Line Ship Rentals Ship & Print		
DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00027	PG-001	Portable Generators

Click on the field **Posting Date**

The Posting Date will require revision to the date the units are being shipped.

EDIT - SHIP RENTALS

Update Shipment Date ☐

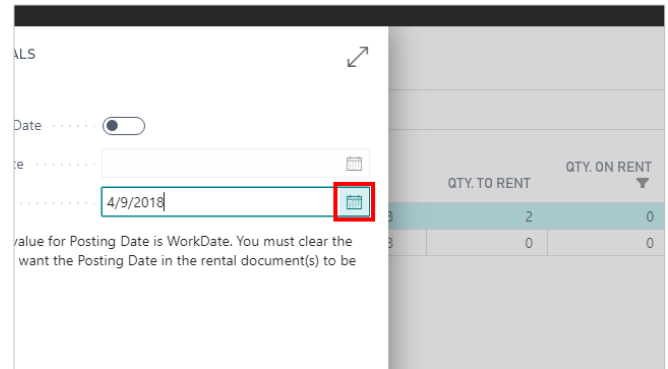
New Shipment Date

Posting Date

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

ODT Rentals Online Help

Click on the link **Open the date picker**

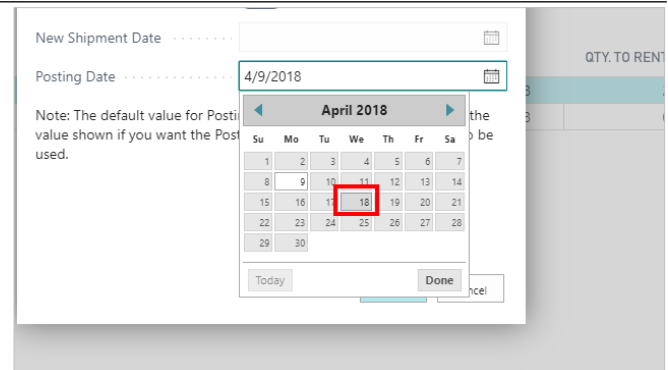


ALS

Date

Value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Click on a date in the calendar



New Shipment Date

Posting Date

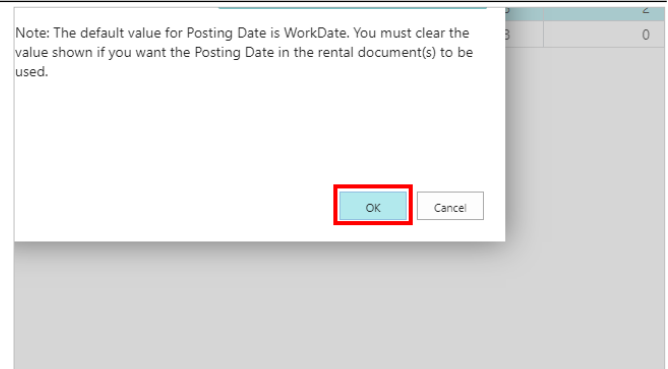
Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

April 2018

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Today Done Cancel

Click on the button **OK**



Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

Click on the cell **Qty. to Rent** with the value 2

On the record where the Qty. to Rent was set to 0, the field is reset to the remaining quantity upon the posting of the first record.

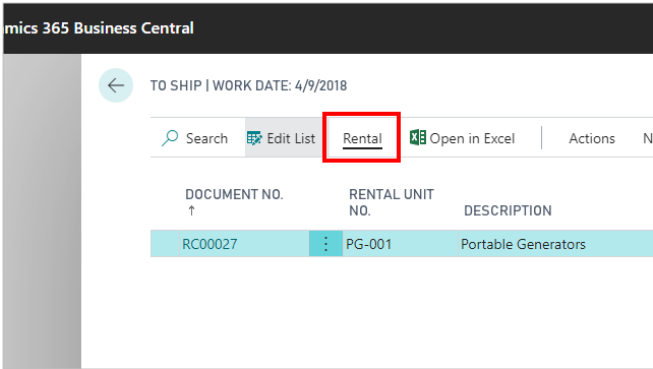
SHIPMENT DATE	RENTAL START DATE	RENTAL RETURN DATE	QTY. TO RENT	QTY. ON RENT	QTY. RETURNED
4/18/2018	4/20/2018	5/19/2018	2	0	0

The following demonstrates the shipment of the remaining quantity on the subsequent day.

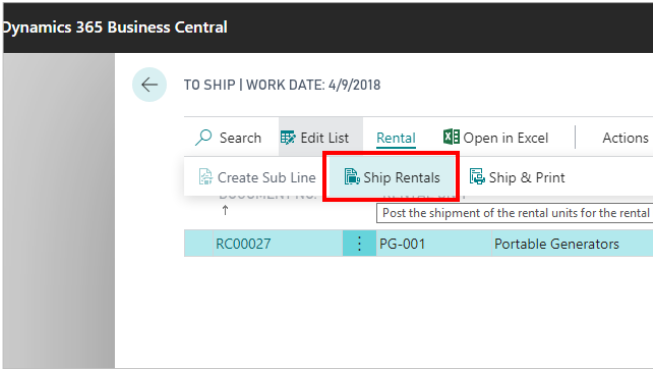


ODT Rentals Online Help

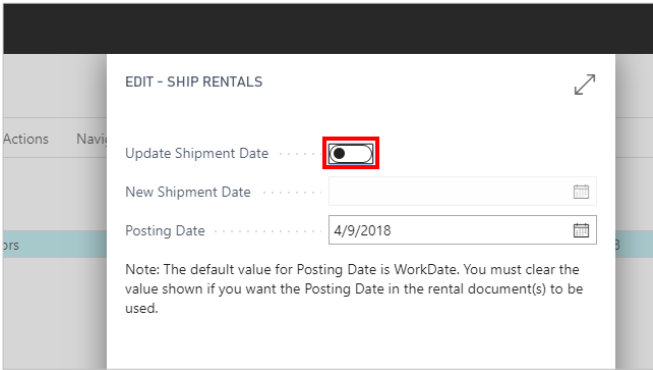
Click on the navigation menu item popup **Rental**



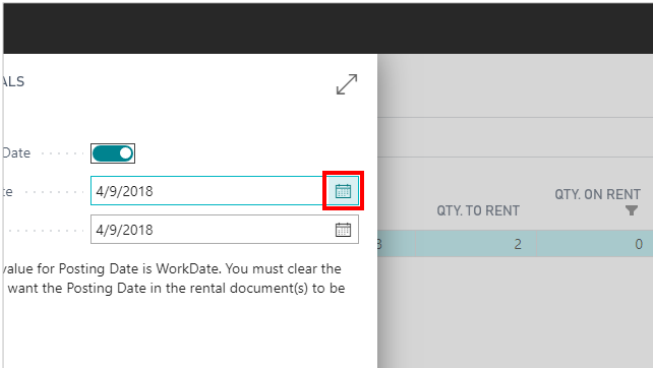
Click on the navigation menu item **Ship Rentals**



Click on the toggle field Update Shipment Date



Click on the link **Open the date picker**





ODT Rentals Online Help

Click on a date in the calendar

Update Shipment Date ☒

New Shipment Date 4/9/2018

Posting Date

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

the

be

Today Done

OK Cancel

Click on the field **Posting Date**

EDIT - SHIP RENTALS

Update Shipment Date ☐

New Shipment Date

Posting Date 4/9/2018

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

type the date in the format mm/dd/yyyy

Click on the link **Open the date picker**

ALS

Date ☒

4/19/2018

4/9/2018

value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Click on a date in the calendar

New Shipment Date 4/19/2018

Posting Date 4/9/2018

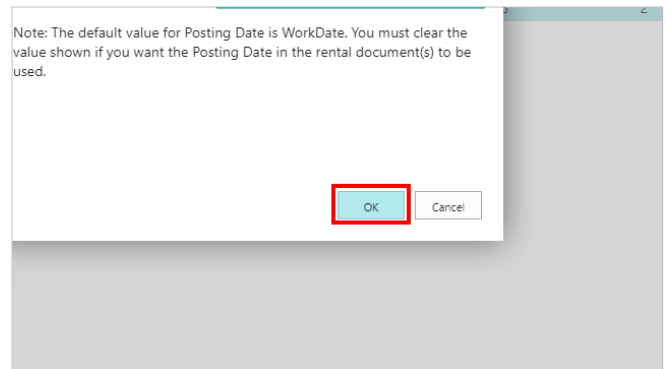
Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

the

be

Today Done

Click on the button **OK**



3.16.2.7. Processing Shipments for Units Linked to Serialized Items

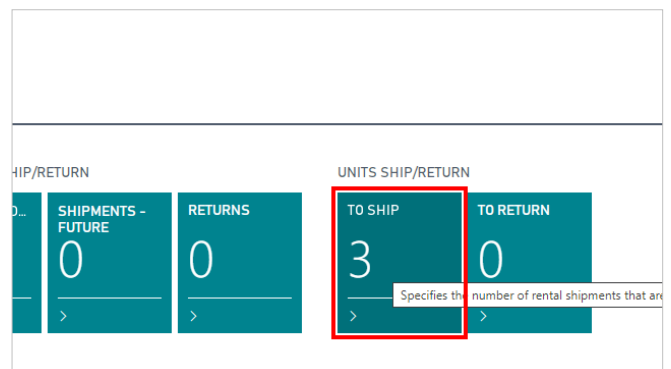
When Rental Units are linked to Items that are serialized, then as with selling serialized items, the Serials Nos. must be selected in the Item Tracking Entries.

For rentals, the selected Serial Nos. are to be equal to the Rental Quantity on the line.

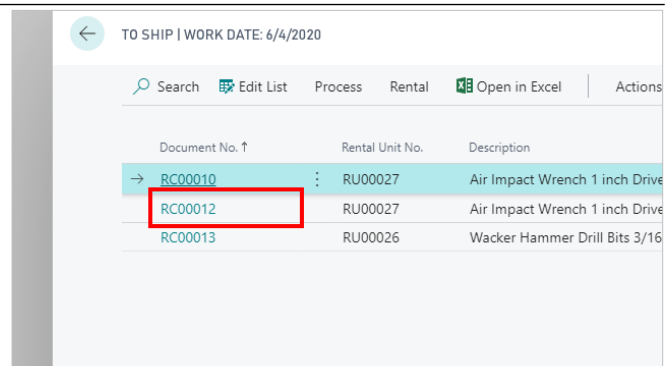
For additional information on Rental Units linked to serialized Items, see ODT Rental Online Help, Processing Rentals, Rental Contract with Rental Units Linked to Items.

The following demonstrates how to manually select the required number of Serial Nos. for Item that is linked to the Rental Unit on the selected record.

Click on the link **To Ship**



Click on the cell **Document No.** with the value **RC00012**





ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process **Rental** Open in Excel Actions

Document No. ↑	Rental Unit No.	Description
RC00010	RU00027	Air Impact Wrench 1 inch Drive
→ RC00012	RU00027	Air Impact Wrench 1 inch Drive
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch

Click on the navigation menu item **Item Tracking Lines**

Dynamics 365 Business Central

← TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions

Item Tracking Lines Create Sub Line Ship Rentals Ship & Prior

View or edit serial numbers and lot numbers that are assigned to the item on the d

RC00010	RU00027	Air Impact Wrench 1 inch Drive
→ RC00012	RU00027	Air Impact Wrench 1 inch Drive
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch

Click on the cell **Serial No.**

Qty. to Handle	2	
Qty. to Invoice	2	
Item Tracking Code	RENTSNALL	Descr
Availability, Serial No.	Serial No.	Quantity
→ Yes		
		Open assist edit

Click on the link in cell **Serial No.**

Qty. to Handle	2	
Qty. to Invoice	2	
Item Tracking Code	RENTSNALL	Descr
Availability, Serial No.	Serial No.	Quantity
→ Yes		



Click on the cell **Serial No.** with the value **SN00003**

SERIAL NO. LIST				
Rental		Lot No. ↑	Serial No. ↑	Total Quantity
Unit No.	Descr			
27	Air In	—	SN00001	1
27	Air In	—	SN00002	1
27	Air In	—	SN00003	1
26	Wack	—	SN00004	1
		—	SN00005	1
		—	SN00006	1
		—	SN00007	1
		—	SN00008	1
		—	SN00009	1

Click on the button **OK**

1	0	0	1
1	0	0	1
1	0	0	1

OK

Cancel

Close

Click on the cell **Serial No.**

Qty. to Invoice

2

Item Tracking Code

RENTSNALL

Descr

Availability, Serial No.

Serial No.

Quantity

→	Yes	:	SN00003	...
---	-----	---	---------	-----

Click on the link in cell **Serial No.**

Qty. to Invoice

2

Item Tracking Code

RENTSNALL

Descr

Availability, Serial No.

Serial No.

Quantity

→	Yes	:	SN00003	...
---	-----	---	---------	-----

Open assist edit



ODT Rentals Online Help

Click on the cell **Serial No.**

Qty. to Invoice 2

Item Tracking Code RENTSNALL Descr

Availability, Serial No.	Serial No.	Quantity
Yes	SN00003	
→ Yes		

Open assist edit

Click on the link in cell **Serial No.**

Qty. to Invoice 2

Item Tracking Code RENTSNALL Descr

Availability, Serial No.	Serial No.	Quantity
Yes	SN00003	
→ Yes		

Open assist edit

Click on the cell **Serial No.** with the value **SN00004**

SERIAL NO. LIST

Rental	Lot No. ↑	Serial No. ↑	Total Quantity	To
Unit No. Descr	—	SN00001	1	
27 Air In	—	SN00002	1	
27 Air In	—	SN00003	1	
26 Wack	—	SN00004	1	
	—	SN00005	1	
	—	SN00006	1	
	—	SN00007	1	
	—	SN00008	1	
	—	SN00009	1	
→	—	SN00010	1	

Click on the button **OK**

1	0	0	1
1	0	0	1
1	0	0	1

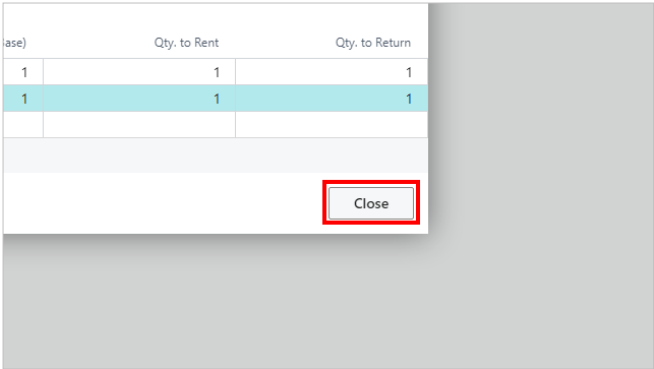
OK Cancel

Close



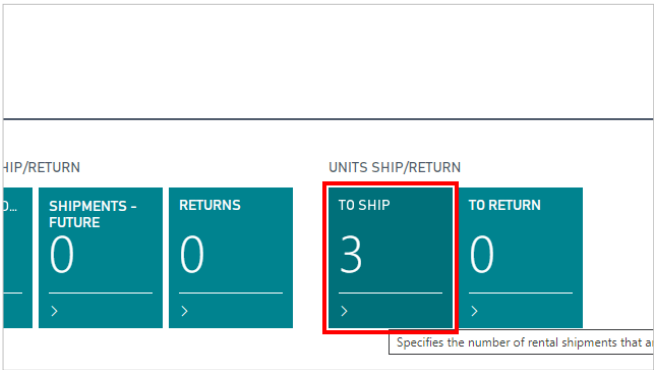
ODT Rentals Online Help

Click on the button **Close**

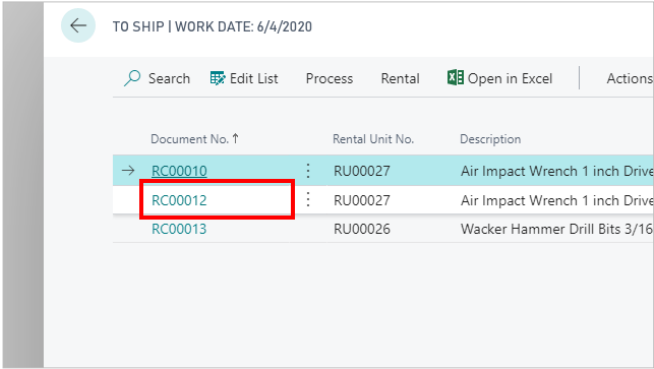


The following demonstrates how to automatically select the next available Serial Nos. for required number for the Item that is linked to the Rental Unit on the selected record.

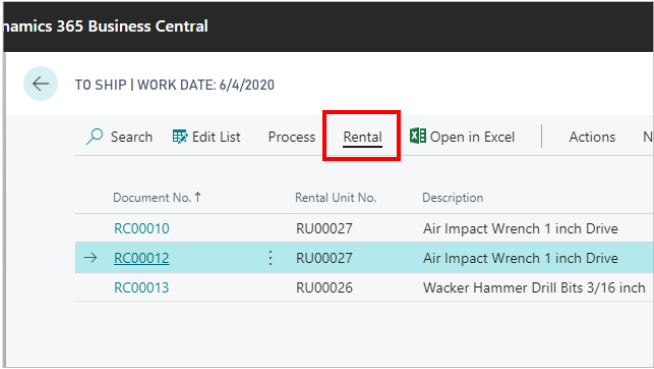
Click on the link **To Ship**



Click on the cell **Document No.** with the value **RC00012**

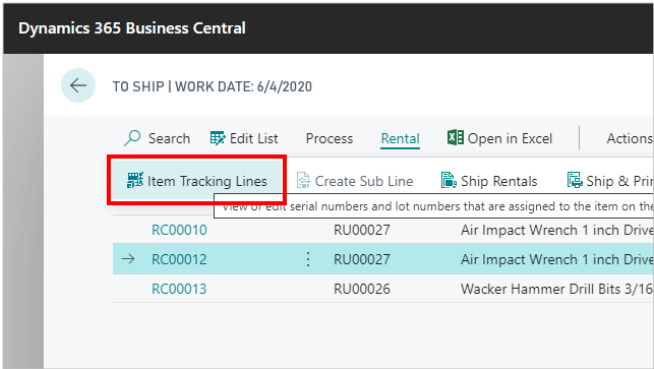


Click on the navigation menu item popup **Rental**

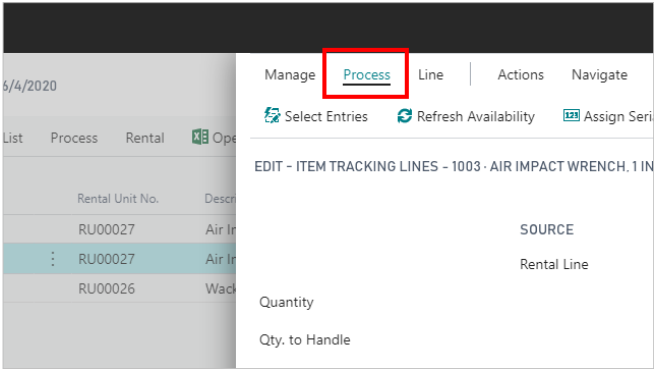




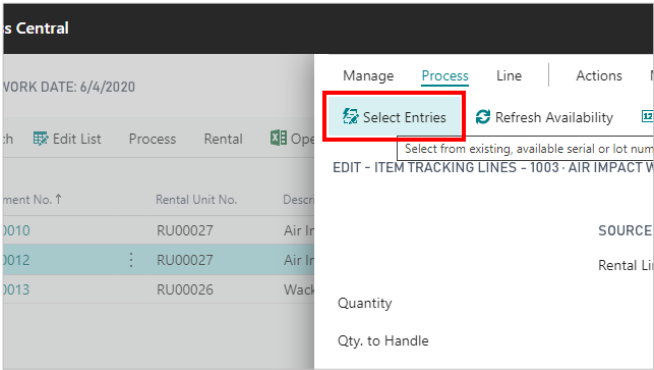
Click on the navigation menu item **Item Tracking Lines**



Click on the navigation menu item popup **Process**

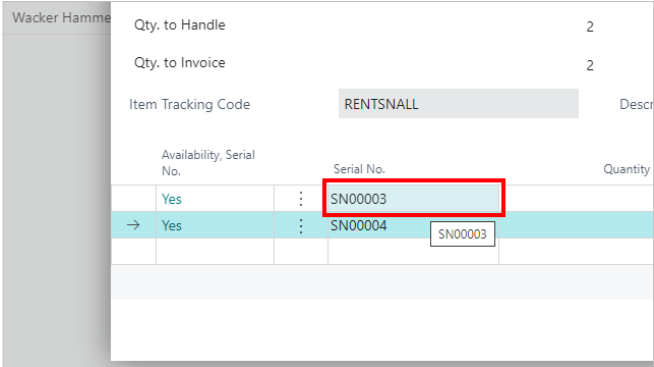


Click on the navigation menu item **Select Entries**



Note that when Select Entries is clicked on that the next 2 available Serial Nos. are automatically selected and populate the lines.

Click on the cell **Serial No.** with the value **SN00003**



Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return
1	1	1
1	1	1

Close

Click on the navigation menu item **Ship Rentals**

65 Business Central

TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions Navigate

Item Tracking Lines Create Sub Line Ship Rentals Ship & Print

Post the shipment of the rental units for the rental contract page.

Document No. ↑	Rental Unit No.	Description
→ RC00012	RU00027	Air Impact Wrench 1 inch Drive
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch

Click on the button **OK**

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

3.16.2.8. Processing Partial Shipments for Units Linked to Serialized Items

The following example demonstrates how to process a partial shipment, when the Rental Unit is linked to a serialized Item.

In the example the Serial Nos. had been already selected, to demonstrate what will occur.

NOTE:

When processing a partial shipment of a Rental Unit linked to a serialized Item, the Serial Nos. should not be selected prior to changing the Qty. to Rent to the quantity that is to be shipped on the line.



ODT Rentals Online Help

Click on the link **To Ship**

SHIP/RETURN

SHIPMENTS - FUTURE

0

>

RETURNS

2

>

UNITS SHIP/RETURN

TO SHIP

2

>

TO RETURN

2

>

Click on the cell **Document No.** with the value **RC00015**

Search Edit List Process Rental Open in Excel Actions

Home

Document No. ↑	Rental Unit No.	Description
→ RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the navigation menu item **Edit List**

Dynamics 365 Business Central

← TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions

Home

Document No. ↑	Rental Unit No.	Description
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the cell **Qty. to Rent** with the value **4**

start	Rental Return Date	Location Code	Bin Code	Qty. to Rent	Qty. on Rent ▼	Qty. to Re
20	7/3/2020	CENTRAL	C-001	2	0	
20	7/3/2020	EAST		4	0	



ODT Rentals Online Help

Enter the text **1**. Press the **Enter** key.

Start	Rental Return Date	Location Code	Bin Code	Qty. to Rent	Qty. on Rent ▼	Qty. to Re
20	7/3/2020	CENTRAL	C-001	2	0	
20	7/3/2020	EAST		<input type="text" value="1"/>	0	

Click on the button **Yes**

This message will occur should the Serial Nos. have been selected before changing the Qty. to Rent to the partial quantity that is to be shipped.

?

This action will delete the item tracking lines, do you wish to continue

Yes

No

Click on the button **Yes**

?

A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1003, linked to Rental Unit RU00027. Do you want to continue?

Yes

No

Click on the navigation menu item popup **Rental**

ynamics 365 Business Central

←

TO SHIP | WORK DATE: 6/4/2020

Search

Edit List

Process

Rental

Open in Excel

Actions

N

Home ▾

Document No. ↑	Rental Unit No.	Description	R
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch	
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	
RC00015	RU00027	Air Impact Wrench 1 inch Drive	



Click on the navigation menu item **Item Tracking Lines**

Dynamics 365 Business Central

TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions

Item Tracking Lines Create Sub Line Ship Rentals Ship & Prior

View or edit serial numbers and lot numbers that are assigned to the item on the document

Document No. ↑	Rental Unit No.	Description
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive
RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the navigation menu item popup **Process**

6/4/2020

Manage Process Line Actions Navigate

Delete

EDIT - ITEM TRACKING LINES - 1003 - AIR IMPACT WRENCH, 1 IN

SOURCE

Rental Line

Quantity

Qty. to Handle

Click on the navigation menu item **Select Entries**

s Central

WORK DATE: 6/4/2020

Manage Process Line Actions

Select Entries Refresh Availability

Select from existing, available serial or lot numbers

EDIT - ITEM TRACKING LINES - 1003 - AIR IMPACT WRENCH, 1 IN

SOURCE

Rental Line

Quantity

Qty. to Handle

Click on the cell **Serial No.** with the value **SN00008**

ITEM TRACKING - SELECT ENTRIES

Lot No. ↑	Serial No. ↑	Total Quantity	Total
—	SN00005	1	
—	SN00006	1	
—	SN00007	1	
→ —	SN00008	1	
—	SN00009	1	
—	SN00010	1	

SELECTABLE

Selectable 1



Click on the button **OK**

0	0	1	0
0	0	1	0
0	0	1	0

SELECTED

UNDEFINED

1

1

OK

Cancel

Quantity (base)	Qty. to Rent	Qty. to Return
0	0	0

Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return
1	1	1

Close

Click on the navigation menu item **Ship Rentals**

65 Business Central

TO SHIP | WORK DATE: 6/4/2020

Search

Edit List

Process

Rental

Open in Excel

Actions

Navigate

Item Tracking Lines

Create Sub Line

Ship Rentals

Ship & Print

Post the shipment of the rental units for the rental contract page.

Document No. ↑	Rental Unit No.	Description
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive
RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the button **OK**

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK

Cancel

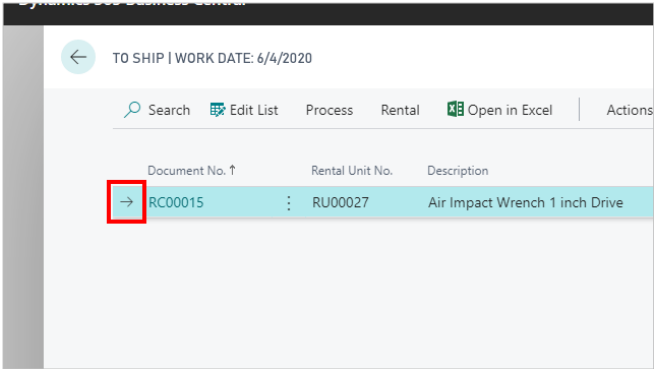
The following demonstrates the shipping of the remaining quantity.

If the shipment was to occur on a different date, then the Shipment Date will need to be changed on the line and the same date be entered in the Posting Date field on the Ship Rentals page.

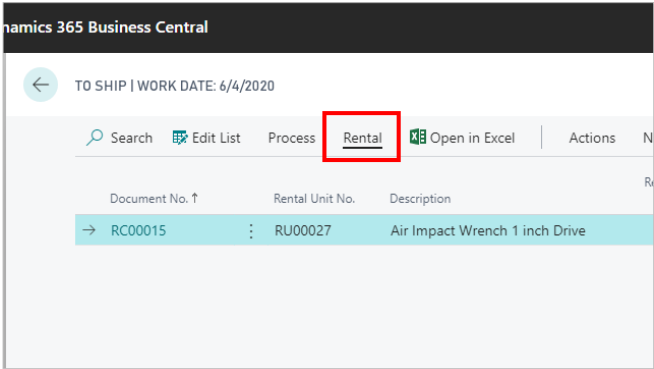


ODT Rentals Online Help

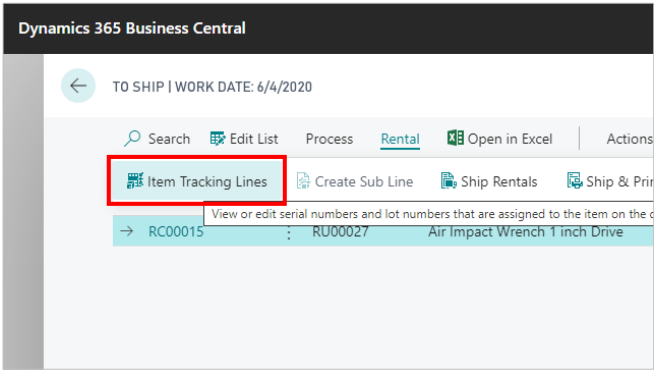
Click on **Document No. = RC00015, Rental Unit No. = RU00027, Description = Air Impact Wrench 1 inch Drive**



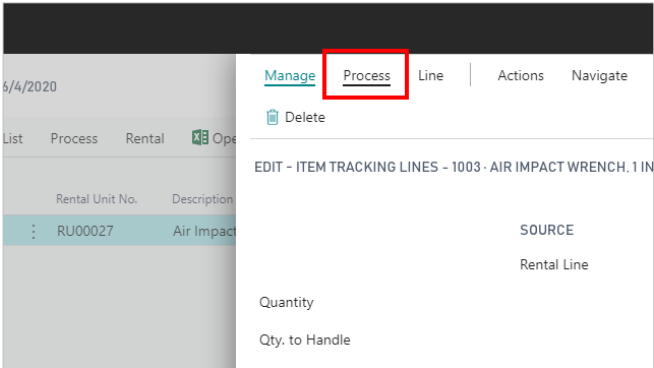
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Item Tracking Lines**

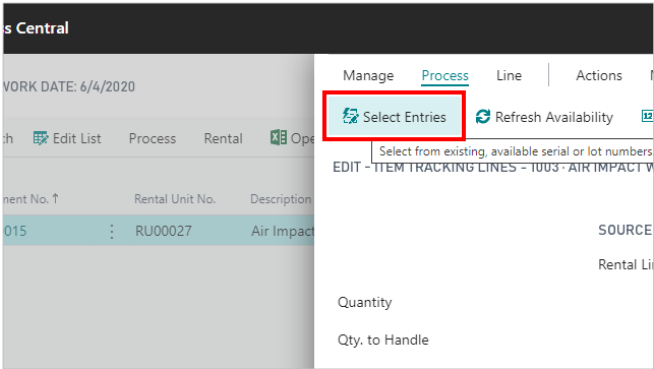


Click on the navigation menu item popup **Process**

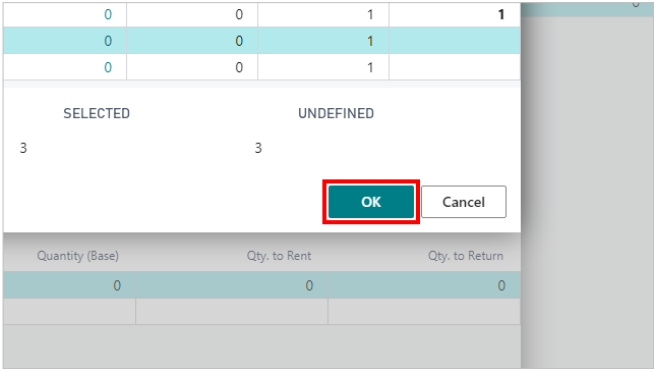




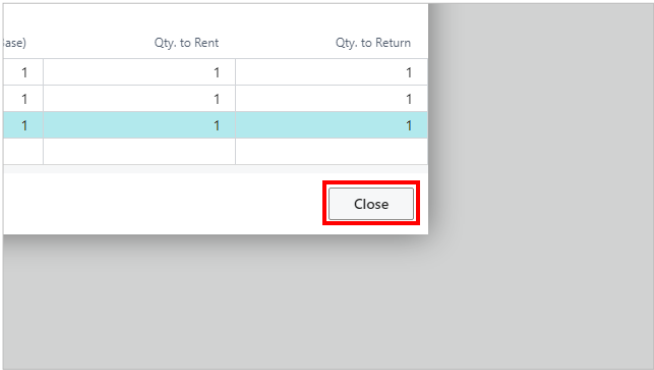
Click on the navigation menu item **Select Entries**



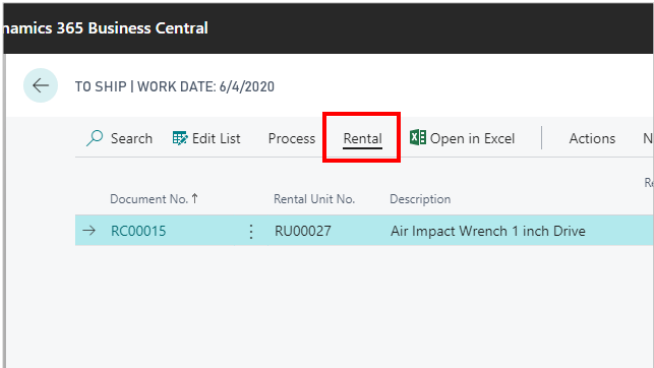
Click on the button **OK**



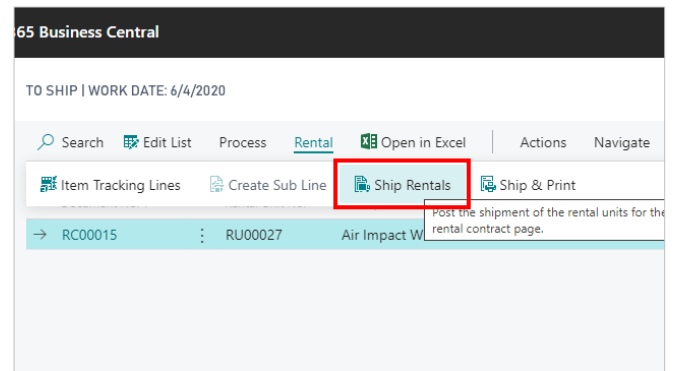
Click on the button **Close**



Click on the navigation menu item popup **Rental**

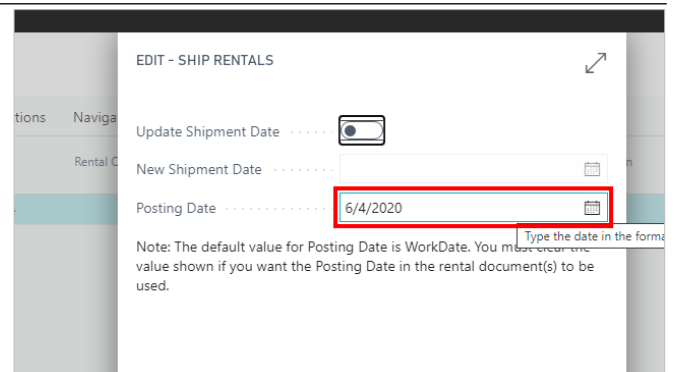


Click on the navigation menu item **Ship Rentals**



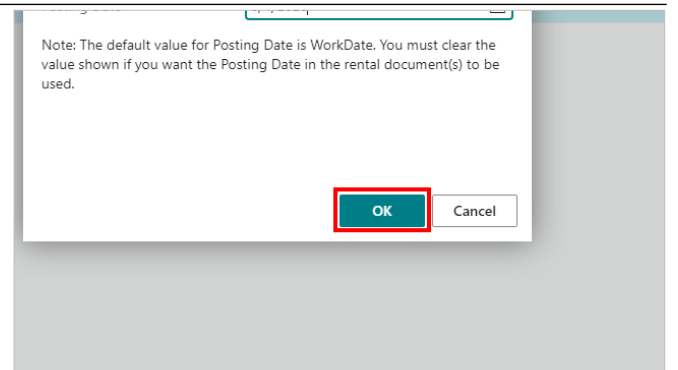
The screenshot shows the '65 Business Central' window. At the top, it says 'TO SHIP | WORK DATE: 6/4/2020'. Below this is a navigation bar with options: Search, Edit List, Process, Rental, Open in Excel, Actions, and Navigate. Under the 'Rental' tab, there are three sub-options: 'Item Tracking Lines', 'Create Sub Line', and 'Ship Rentals'. The 'Ship Rentals' option is highlighted with a red box. To the right of 'Ship Rentals' is a tooltip that says 'Post the shipment of the rental units for the rental contract page.' Below the navigation bar, there is a table with columns 'RC00015', 'RU00027', and 'Air Impact W'.

Click on the field **Posting Date**



The screenshot shows the 'EDIT - SHIP RENTALS' dialog box. It has a title bar with 'EDIT - SHIP RENTALS' and a close button. Below the title bar, there are three fields: 'Update Shipment Date' with a calendar icon, 'New Shipment Date' with a calendar icon, and 'Posting Date' with a calendar icon. The 'Posting Date' field is highlighted with a red box and contains the date '6/4/2020'. Below the fields, there is a note: 'Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.' To the right of the note, there is a tooltip that says 'Type the date in the format YYYY-MM-DD'.

Click on the button **OK**



The screenshot shows the 'EDIT - SHIP RENTALS' dialog box. It has a title bar with 'EDIT - SHIP RENTALS' and a close button. Below the title bar, there is a note: 'Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.' At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

3.16.2.9. Processing Shipments for Units Linked to Items Stored in Bins

When a Rental Unit is entered on the rental line of the contract, the Bin Code specified as the Default Bin, defaults to the Bin Code on the rental line. The Bin Code on the rental line populates the Transfer-from Bin Code field on the Transfer Order created.

The Bin Code can be modified on the To Ship List or the Rental Contract, should the quantity of items required need to be picked from a different Bin. To open the Rental Contract, select Process, then Card.

When the items are picked from the bin that is displayed in the Bin Code on the line and Pick List, then processing of the shipment consists of selecting the menu option Rental, then Ship Rental.

The following example demonstrates the process for when the items are picked from the bin that is on the line and Pick List.



Click on the link **To Ship**

SHIP/RETURN

SHIPMENTS - FUTURE

0

>

RETURNS

3

>

UNITS SHIP/RETURN

TO SHIP

2

>

TO RETURN

3

>

Specifies the number of rental shipments that a

Click on **Document No. = RC00013, Rental Unit No. = RU00026, Description = Wacker Hammer Drill Bits 3/16 inch**

← TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions

Document No. ↑	Rental Unit No.	Description
→ RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the navigation menu item popup **Rental**

ynamics 365 Business Central

← TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions

Document No. ↑	Rental Unit No.	Description
→ RC00013	RU00026	Wacker Hammer Drill Bits 3/16 inch
RC00015	RU00027	Air Impact Wrench 1 inch Drive

Click on the navigation menu item **Ship Rentals**

65 Business Central

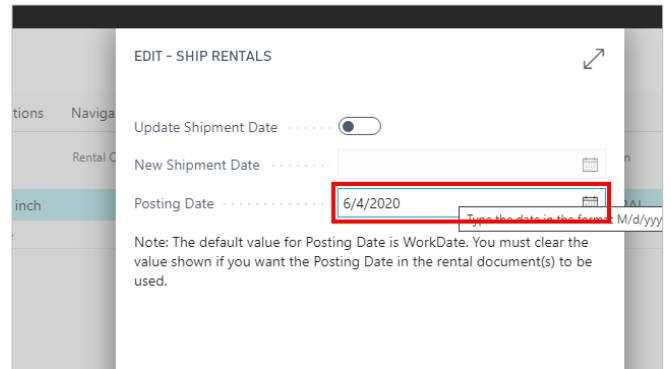
TO SHIP | WORK DATE: 6/4/2020

Search Edit List Process Rental Open in Excel Actions Navigate

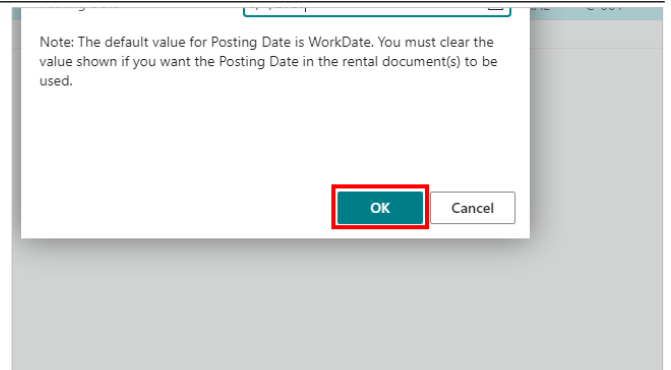
Item Tracking Lines Create Sub Line Ship Rentals Ship & Print

→ RC00013	RU00026	Wacker Han	Post the shipment of the rental units for the rental contract page.
RC00015	RU00027	Air Impact Wrench 1 inch Drive	

Click on the field **Posting Date**



Click on the button **OK**



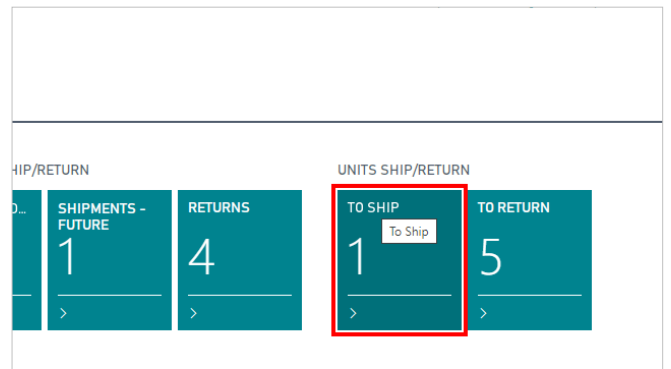
3.16.2.10.

Processing Partial Shipments for Units Linked to Items

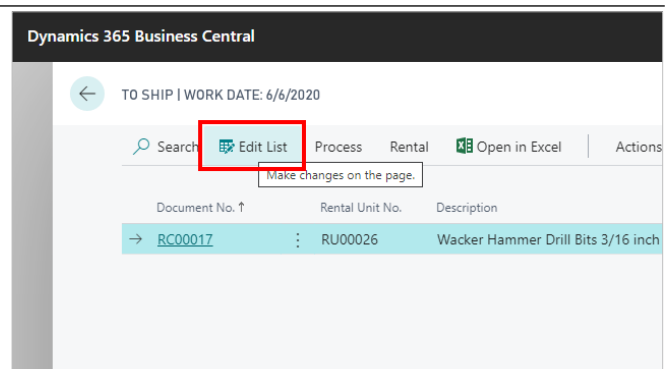
Stored in Bins

The following example demonstrates the processing of a partial shipment when the Rental Unit is linked to an Item stored in Bins. The example also demonstrates the processing of the second shipment on a subsequent date and from a different bin.

Click on the link **To Ship 1**



Click on the navigation menu item **Edit List**



Document No. ↑	Rental Unit No.	Description
→ RC00017	RU00026	Wacker Hammer Drill Bits 3/16 inch



ODT Rentals Online Help

Click on the cell **Qty. to Rent** with the value **5**

Start	Rental Return Date	Location Code	Bin Code	Qty. to Rent	Qty. on Rent ▼	Qty. to Re
20	7/7/2020	CENTRAL	C-001	5	0	

Enter the text **2**. Press the **Enter** key.

Start	Rental Return Date	Location Code	Bin Code	Qty. to Rent	Qty. on Rent ▼	Qty. to Re
20	7/7/2020	CENTRAL	C-001	2	0	

500.00

Click on the button **Yes**

?

A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1001, linked to Rental Unit RU00026. Do you want to continue?

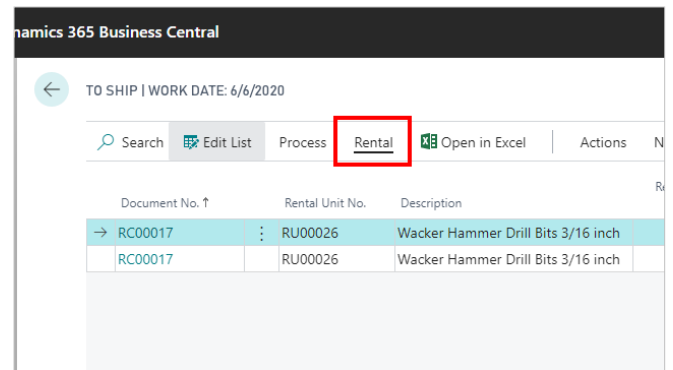
Yes

No

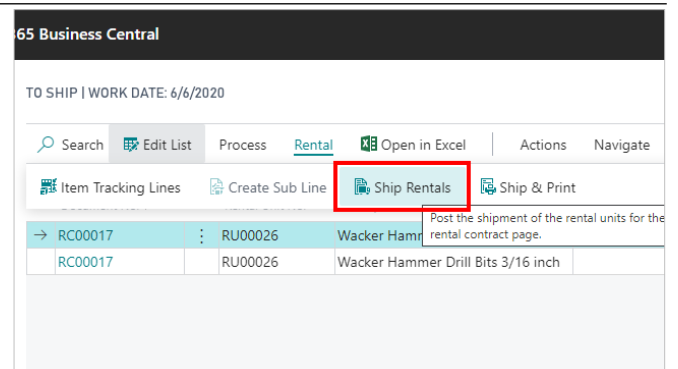
Click on **Document No. = RC00017**, **Rental Unit No. = RU00026**, **Description = Wacker Hammer Drill Bits 3/16 inch**

TO SHIP | WORK DATE: 6/6/2020		
Document No. ↑	Rental Unit No.	Description
→ RC00017	RU00026	Wacker Hammer Drill Bits 3/16 inch
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 inch

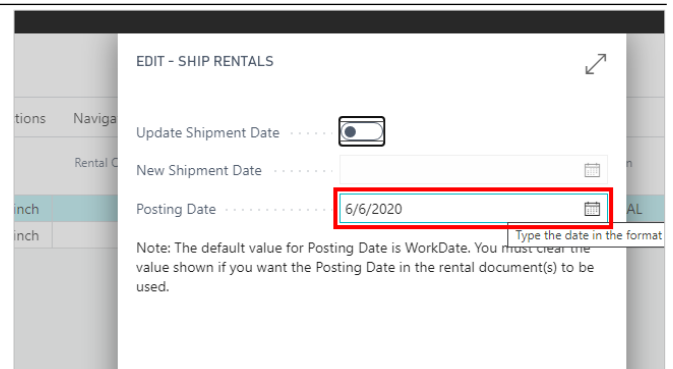
Click on the navigation menu item popup **Rental**



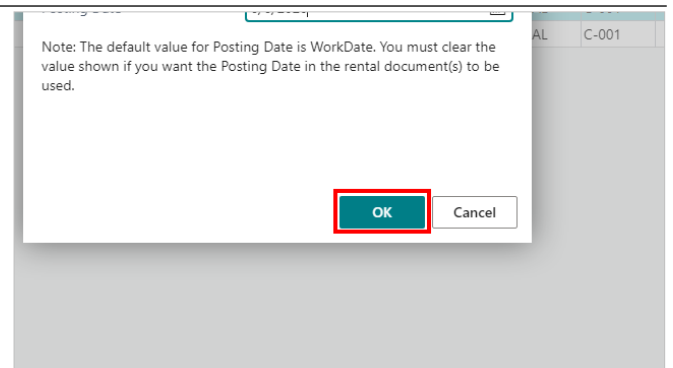
Click on the navigation menu item **Ship Rentals**



Click on the field **Posting Date**



Click on the button **OK**



The following demonstrates the process to be used to change the Bin Code when the items were picked from a different bin than displayed on the line and the shipping of the Rental Unit on a different Shipment Date than on the line.



ODT Rentals Online Help

Click on the cell **Bin Code** with the value **C-001**

Description	Rental Quantity	Bin Code	Required Shipping Date	Shipment Date
Wacker Hammer Drill Bits 1/2 i...	3	C-001	6/6/2023	6/6/2023

Click on the lookup button in the cell **Bin Code**

Description	Rental Quantity	Bin Code	Required Shipping Date	Shipment Date
Wacker Hammer Drill Bits 1/2 i...	3	C-001	6/6/2023	6/6/2023

Click on the link in cell **Code** with the value **C-002**

Code	Description
C-001	Bin C-001
C-002	Bin C-002

Click on the navigation menu item **Rental**

Document No.	Rental Unit No.	Description	Rental Quantity
RC00017	RU00026	Wacker Hammer Drill Bits 1/2 i...	



Click on the navigation menu item **Ship Rentals**

s%20Inc.&node=042c5563-b596-0000-0c0b-8000836bd2d2&page=70014250&filter=%27ODT%20Rent

To Ship

Search Edit List Home Rental More options

Item Tracking Lines Create Sub Line **Ship Rentals** Ship & Print Rental

Document No. ↑ Rental Unit No. Description Rental Quantity Bin Co

→ RC00017 RU00026 Wacker Hammer Drill Bits 1/2 i... 3 C-00

Post the shipment of the rental units for the rental contract page.

Click on the toggle field Update Shipment Date

ment No. ↑ Rental Unit No. Description Rental Quantity Bin Code Requi Ship Date

0017 RU00026 Wacker Hammer Drill Bits 1/2 i... 3 C-002 6/6

Edit - Ship Rentals

Update Shipment Date ☒

New Shipment Date

Posting Date 6/6/2023

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Click on the link **Open the date picker for New Shipment Date**

Rental Quantity Bin Code Shipping Date Shipment Date

mmmer Drill Bits 1/2 i... 3 C-002 6/6/2023 6/6/2023

nt management

6/6/2023

6/6/2023

Open the date picker for New Shipment Date

ing Date is WorkDate. You must clear the value shown if rental document(s) to be used.

Click on a date in the calendar

Update Shipment Date ☒

ew Shipment Date 6/6/2023

osting Date 6/6/2023

ote: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

June 2023

Su Mo Tu We Th Fr Sa

4 5 6 7 8 9 10

11 12 13 14 15 16 17

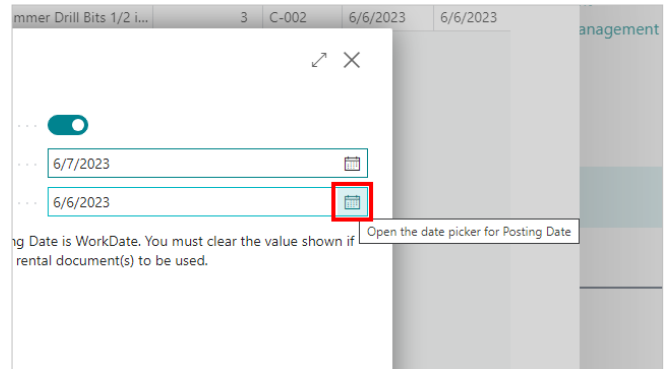
18 19 20 21 22 23 24

25 26 27 28 29 30

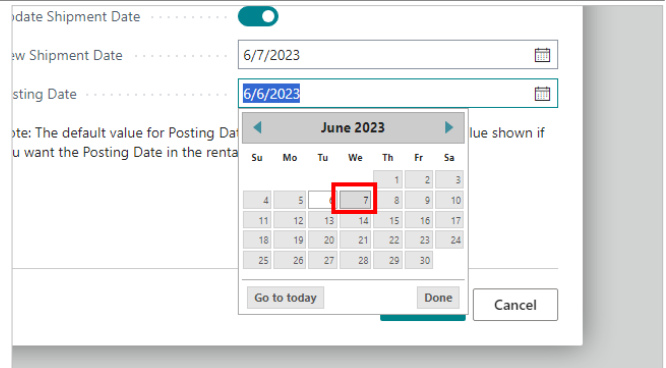
Go to today Done

OK Cancel

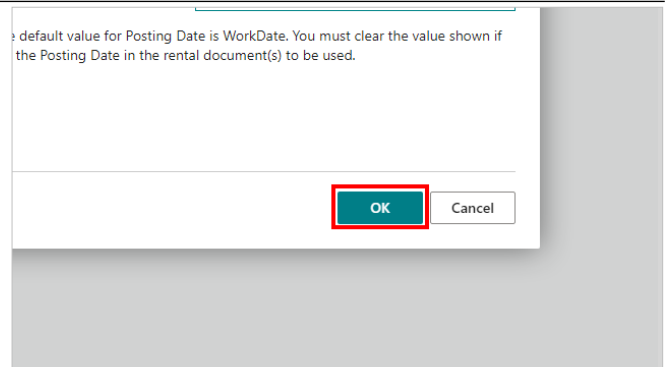
Click on the link **Open the date picker for Posting Date**



Click on a date in the calendar



Click on the button **OK**



3.16.3. How to Process Returns from the To Return Cue

3.16.3.1. Overview

From the To Return cue, warehouse or yard personnel are able to review a list of units which are out on rent, on all the open Rental Contracts and process the return of the Rental Units. Returns can be processed for multiple contracts at the same time.

In addition, partial returns can be processed from the To Return list, when the Rental Quantity is greater than 1 on the line.

There are additional fields, which can be added to the line in the list using Personalize. Which fields should be added is dependent on the organization's configuration for rentals, and whether locations are used.

When units are linked to Items stored in Bins, and may be returned to a different Bin, then add the Return Bin Code field.

On the To Return list, units can be returned to a different rental location, or to a temporary rental location. In order to do so, add the Location Code, Return Location Code and Return Temporary Location fields.

For information on how to add fields to the To Return list lines, see the Pending Shipments and Returns Overview.

To learn about processing returns to a different or temporary location, see ODT Rental Online Help, Processing



Rentals, Returning Units to a Different or Temporary Location.

NOTE:

When an organization unit has Metered Usage or Periodic Usage pricing the usage must be entered on the rental contract.

The following examples demonstrate the processing of returns from the To Return list.

3.16.3.2. Processing Returns from the To Return List

The following demonstrates the processing of returns from the To Return list for individual Rental Units from 2 different rental contracts.

Click on the link **To Return**

Click on the navigation menu item **Edit List**

Click on the cell **Qty. to Return** with the value 0

RENTAL RETURN TIME	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	RET... DAY BIL...
11:59:59 PM	0	1	0	0	✓
11:59:59 PM	0	1	0	0	✓
11:59:59 PM	0	2	0	0	✓
11:59:59 PM	0	2	0	0	✓



Enter the text 1.

✓ SAVED						
RENTAL RETURN TIME	QTY. TO RENT	QTY. ON RENT ▼	QTY. TO RETURN	QTY. RETURNED ▼	RET... DAY BIL...	
11:59:59 PM	0	1	1	0	✓	
11:59:59 PM	0	1	0	0	✓	
11:59:59 PM	0	2	0	0	✓	
11:59:59 PM	0	2	0	0	✓	

Click on the cell **Qty. to Return** with the value 0

✓ SAVED						
RENTAL RETURN TIME	QTY. TO RENT	QTY. ON RENT ▼	QTY. TO RETURN	QTY. RETURNED ▼	RET... DAY BIL...	
11:59:59 PM	0	1	1	0	✓	
11:59:59 PM	0	1	0	0	✓	
11:59:59 PM	0	2	0	0	✓	
11:59:59 PM	0	2	0	0	✓	

Enter the text 1.

✓ SAVED						
RENTAL RETURN TIME	QTY. TO RENT	QTY. ON RENT ▼	QTY. TO RETURN	QTY. RETURNED ▼	RET... DAY BIL...	
11:59:59 PM	0	1	1	0	✓	
11:59:59 PM	0	1	1	0	✓	
11:59:59 PM	0	2	0	0	✓	
11:59:59 PM	0	2	0	0	✓	

Select the records on which the units are to be returned.

Press and hold the **Shift** key down.

Click on **Document No. = RC00025, Rental Unit No. = RU00002, Description = Buckeye Ditcher**

← TO RETURN | WORK DATE: 4/9/2018		
Search	Edit List	Rental
Open in Excel		
Action		
DOCUMENT NO. ↑	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher
RC00027	PG-001	Portable Generators
RC00027	PG-001	Portable Generators



Click on the navigation menu item popup **Rental**

TO RETURN | WORK DATE: 4/9/2018

Search Edit List **Rental** Open in Excel Actions

DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher
RC00027	PG-001	Portable Generators
RC00027	PG-001	Portable Generators

Click on the navigation menu item **Return Rentals**

TO RETURN | WORK DATE: 4/9/2018

Search Edit List **Return Rentals** Open in Excel Action

Bulk Returns Return Rentals Return & Print...

Post the return of the rental units on the rental

DOCUMENT NO.	RENTAL UNIT NO.	DESCRIPTION
RC00025	RU00002	Buckeye Ditcher
RC00026	BD-006	Buckeye Ditcher
RC00027	PG-001	Portable Generators
RC00027	PG-001	Portable Generators

In this example the units are being returned on the Rental Return Date.

Therefore, the Update Return Date field is not being enabled and subsequently the New Return Date field cannot be edited.

Click on the field **Posting Date**

EDIT - RETURN RENTALS

Update Return Date ☐

New Return Date

Posting Date

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Click on the link **Open the date picker**

EDIT - RETURN RENTALS

Update Return Date ☐

New Return Date

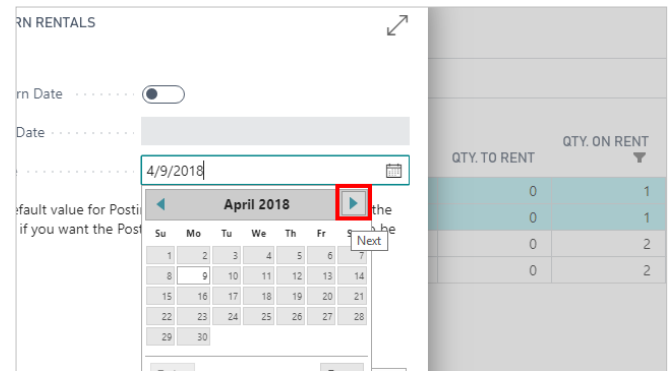
Posting Date

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

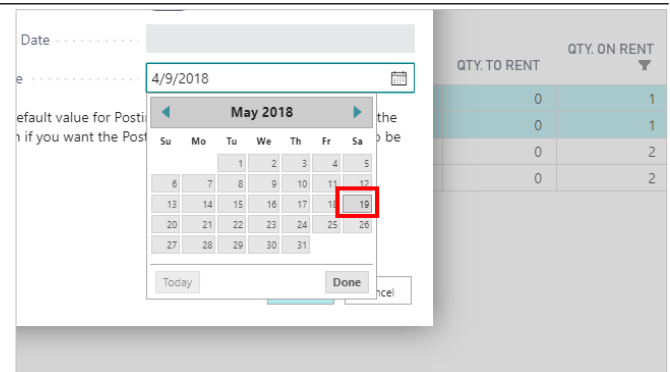
Open the date picker

QTY. TO RENT	QTY. ON RENT
0	1
0	1
0	2
0	2

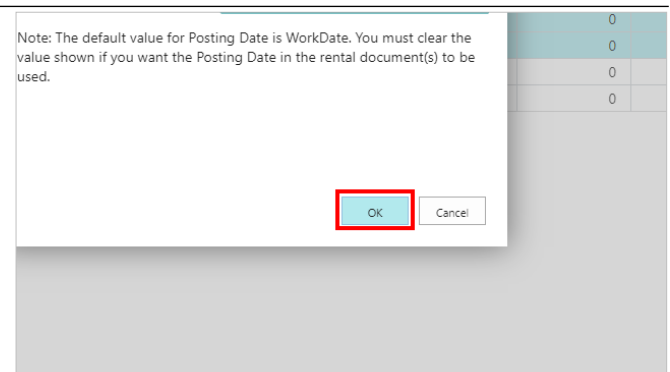
Click on the link **Next**



Click on a date in the calendar
Select the date the returns are to be posted to.
Normally this will be the same date that the Rental
Units are returned.



Click on the button **OK**

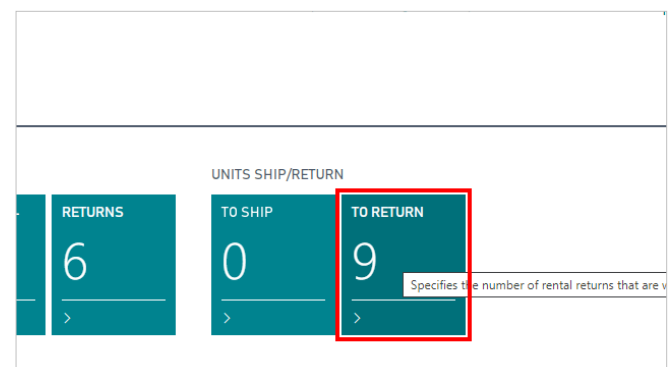


3.16.3.3. Processing Partial Returns from the To Return List

The following example demonstrates the process for partial returns when Rental Units are linked Items. The Rental Return Date on the line is 7/3/2020, however one of the units is being returned a day early on 7/2/2020.

The same process is used when a Rental Unit allows overbooking and the Rental Quantity shipped is greater than one.

Click on the link **To Return**





Click on the navigation menu item **Edit List**

Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/2/2020

Search Edit List Rental Open in Excel Actions Navigat

Make changes on the page.

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00012	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00013	RU00026	Wacker Hammer Drill Bits 3/16...	CENTRA
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16...	CENTRA

Click on **Document No. = RC00019**, **Rental Unit No. = PG-001**, **Description = Portable Generators**

RC00013	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST
RC00019	PG-001	Portable Generators	EAST

Click on the cell **Qty. to Return** with the value **0**

0	0	0	2	0	0		C-001	
0	0	0	1	0	0			
0	0	0	3	0	0			
0	0	0	2	0	0		C-001	
0	0	0	3	0	0		C-002	
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			
0	0	0	3	0	0			

Enter the text **1**.

Press the Tab or Enter key to move off the field.

0	0	0	2	0	0		C-001	
0	0	0	1	0	0			
0	0	0	3	0	0			
0	0	0	2	0	0		C-001	
0	0	0	3	0	0		C-002	
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			
0	0	0	3	1	0			



ODT Rentals Online Help

Click on the button **Yes**

3 MONTH-END 6/4/2020 7/3/2020 11:59:59 PM 0 0

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes No

Click on the cell **Partial Return Date** with the value **6/4/2020**

0		C-001		<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0		C-001		<input checked="" type="checkbox"/>		
0		C-002		<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>	6/4/2020	

Type the date in the format M/d/yyyy

Click on the link in cell **Partial Return Date** with the value **6/4/2020**

0		C-001		<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0		C-001		<input checked="" type="checkbox"/>		
0		C-002		<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>	6/4/2020	

Open the date picker

Click on the link **Next**

0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0		C-001		<input checked="" type="checkbox"/>		
0		C-002		<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>		
0				<input checked="" type="checkbox"/>	6/4/2020	

June 2020

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				



ODT Rentals Online Help

Click on a date in the calendar

Select the date that the quantity is being returned on.
In this example, 7/2/2020 is selected.

0		C-001		<input checked="" type="checkbox"/>				
0		C-002		<input checked="" type="checkbox"/>				
0				<input checked="" type="checkbox"/>				
0				<input checked="" type="checkbox"/>				
0				<input checked="" type="checkbox"/>	6/4/2020			

Click on the navigation menu item popup **Rental**

Document No. ↑	Location Code	Rental Quantity	Rental Terms Code	Rental Start Date	Rental End Date
RC00012	EAST	2	MONTH-PEND	6/4/2020	7/3/2020
RC00013	CENTRAL	2	MONTH-PEND	6/4/2020	7/3/2020
RC00015	EAST	1	MONTH-PEND	6/4/2020	7/3/2020
RC00015	EAST	3	MONTH-PEND	6/4/2020	7/3/2020
RC00017	CENTRAL	2	MONTH-PEND	6/8/2020	7/7/2020

Click on the navigation menu item **Return Rentals**

Document No. ↑	Code	Rental Quantity	Rental Terms Code	Rental Start Date	Rental End Date
RC00012	EAST	2	MONTH-PEND	6/4/2020	7/3/2020
RC00013	CENTRAL	2	MONTH-PEND	6/4/2020	7/3/2020
RC00015	EAST	1	MONTH-PEND	6/4/2020	7/3/2020
RC00015	EAST	3	MONTH-PEND	6/4/2020	7/3/2020
RC00017	CENTRAL	2	MONTH-PEND	6/8/2020	7/7/2020

Click on the button **OK**

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

Note that a line remains in the list for the contract and unit, which contains the remaining quantity that was not returned in the Qty. on Rent field.



ODT Rentals Online Help

Click on **Document No. = RC00019, Rental Unit No. = PG-001, Description = Portable Generators**

RC00013	CENTRAL	2	MONTH-PEND	6/4/2020	7/3
RC00015	EAST	1	MONTH-PEND	6/4/2020	7/3
RC00015	EAST	3	MONTH-PEND	6/4/2020	7/3
RC00017	CENTRAL	2	MONTH-PEND	6/8/2020	7/7
RC00017	CENTRAL	3	MONTH-PEND	6/8/2020	7/7
RC00018	EAST	1	MONTH-PEND	6/7/2020	7/6
RC00018	EAST	1	MONTH-PEND	6/7/2020	7/6
→ RC00019	EAST	2	MONTH-END	6/4/2020	7/3

Click on the cell **Qty. on Rent** with the value **2**

<input type="checkbox"/>	0	0	0	2	0	0	C-0
<input type="checkbox"/>	0	0	0	1	0	0	
<input type="checkbox"/>	0	0	0	3	0	0	
<input type="checkbox"/>	0	0	0	2	0	0	C-0
<input type="checkbox"/>	0	0	0	3	0	0	C-0
<input checked="" type="checkbox"/>	15,000	0	0	1	0	0	
<input checked="" type="checkbox"/>	14,250	0	0	1	0	0	
<input type="checkbox"/>	0	0	0	2	0	0	

The following demonstrates the returning of the remaining quantity still out on rent on the subsequent day.

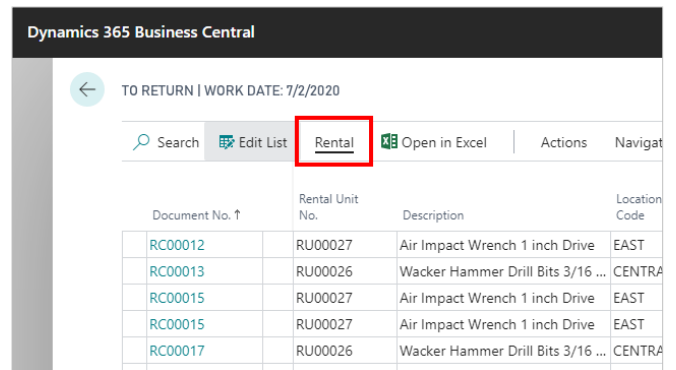
Click on the cell **Qty. to Return** with the value **0**

0	0	0	2	0	0	C-001
0	0	0	1	0	0	
0	0	0	3	0	0	
0	0	0	2	0	0	C-001
0	0	0	3	0	0	C-002
15,000	0	0	1	0	0	
14,250	0	0	1	0	0	
0	0	0	2	0	0	

Enter the text **2**.

0	0	0	2	0	0	C-001
0	0	0	1	0	0	
0	0	0	3	0	0	
0	0	0	2	0	0	C-001
0	0	0	3	0	0	C-002
15,000	0	0	1	0	0	
14,250	0	0	1	0	0	
0	0	0	2	0	0	

Click on the navigation menu item popup **Rental**



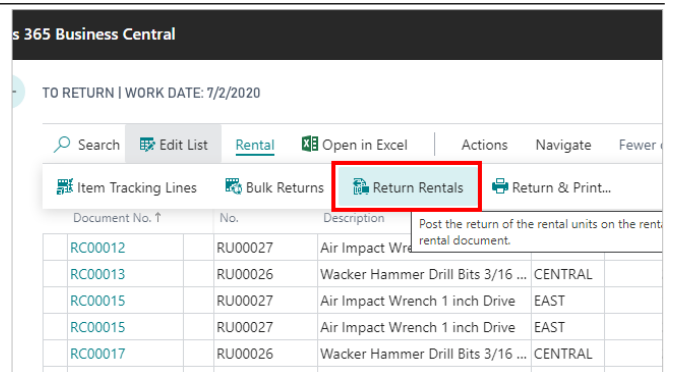
Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/2/2020

Search Edit List **Rental** Open in Excel Actions Navigate

Document No. ↑	Rental Unit No.	Description	Location Code
RC00012	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

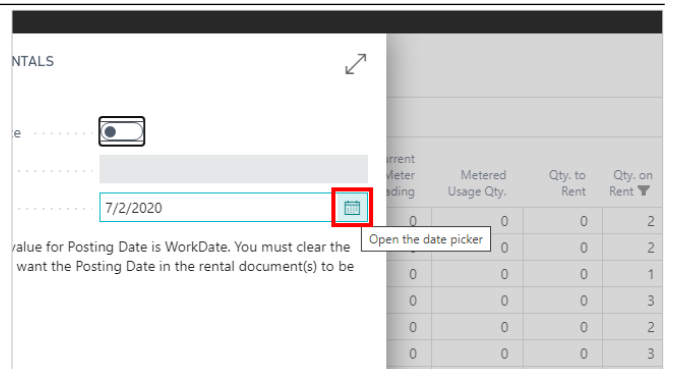
TO RETURN | WORK DATE: 7/2/2020

Search Edit List Rental Open in Excel Actions Navigate Fewer

Item Tracking Lines Bulk Returns **Return Rentals** Return & Print...

Document No. ↑	No.	Description	Post the return of the rental units on the rental document.
RC00012	RU00027	Air Impact Wrench 1 inch Drive	
RC00013	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRAL
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRAL

Click on the link **Open the date picker**



Return Rentals

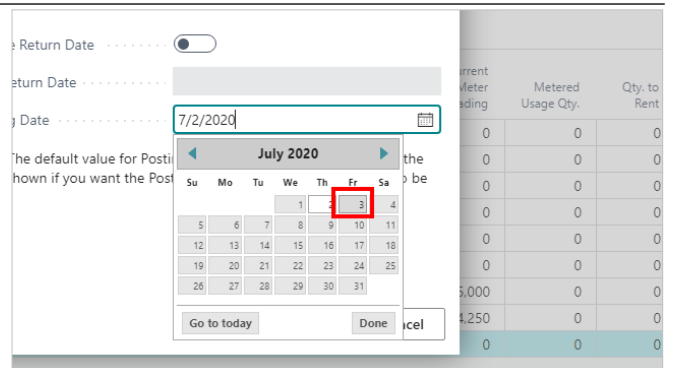
Return Date: 7/2/2020

Open the date picker

Current Meter Reading	Metered Usage Qty.	Qty. to Rent	Qty. on Rent
0	0	0	2
0	0	0	2
0	0	0	1
0	0	0	3
0	0	0	2
0	0	0	3

Click on a date in the calendar

Select the date the remaining units are being returned on.
In this example 7/3/2020.



Return Date: 7/2/2020

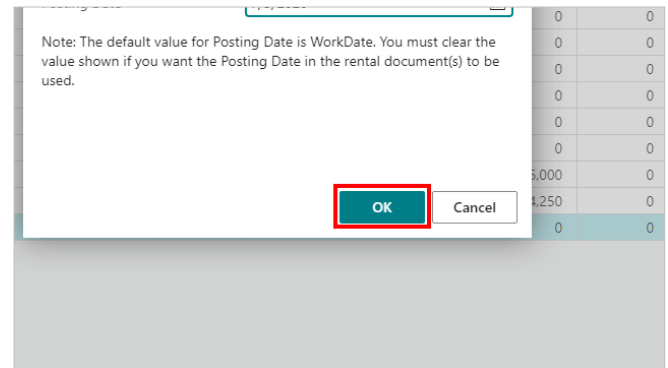
Return Date: 7/2/2020

July 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Go to today Done

Click on the button **OK**



Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

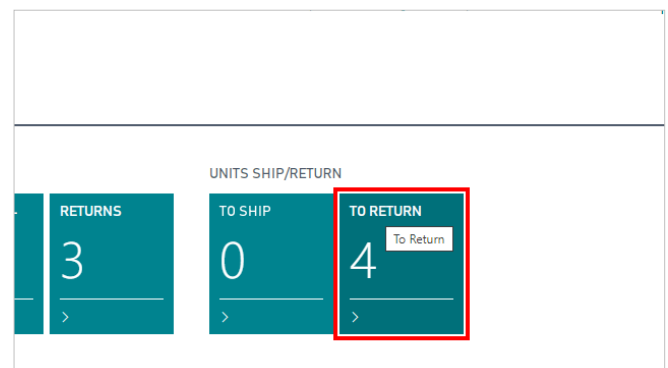
3.16.3.4. Processing Partial Returns for Units Linked to Serialized Items

The following example demonstrates the process for partial returns, when Rental Units are linked to Serialized Items.

In the example, 2 of the 3 units out on rent are being returned the day before the Rental Return Date on the line.

When returning the full Rental Quantity for units linked to serialized items, the process is to select Rental, Return Rentals, then set the Posting Date to the date of the return and select ok.

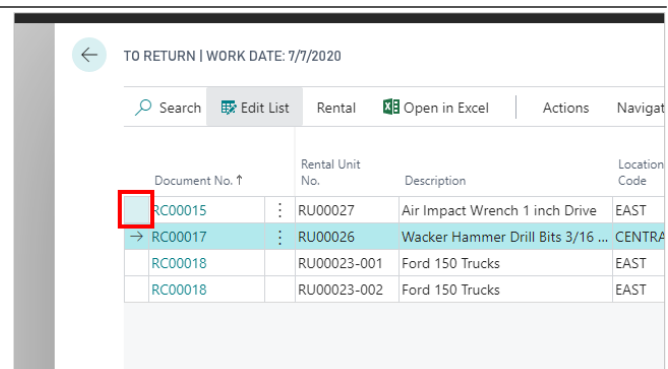
Click on the link **To Return 4**



UNITS SHIP/RETURN

RETURNS	TO SHIP	TO RETURN
3	0	4

Click on **Document No. = RC00015, Rental Unit No. = RU00027, Description = Air Impact Wrench 1 inch Drive**



Document No. ↑	Rental Unit No.	Description	Location Code
RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
→ RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

The Item Tracking Lines must have the Qty. to Return field set to 0 on the lines, for the Serial Nos. of the item or items not being returned.

IMPORTANT

This must be done before changing the Qty. to Return quantity on the To Return lines.



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/7/2020

Search Edit List **Rental** Open in Excel Actions Navigat

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the navigation menu item **Item Tracking Lines**

Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/7/2020

Search Edit List Rental Open in Excel Actions Navigat

Item Tracking Lines Bulk Returns Return Rentals Return & P

Document View or edit serial numbers and lot numbers that are assigned to the item on the dc

Document	View or edit serial numbers and lot numbers that are assigned to the item on the dc
→ RC00015	RU00027 Air Impact Wrench 1 inch Drive EAST
RC00017	RU00026 Wacker Hammer Drill Bits 3/16 ... CENTRA
RC00018	RU00023-001 Ford 150 Trucks EAST
RC00018	RU00023-002 Ford 150 Trucks EAST

Click on the cell **Qty. to Return** with the value **1**

0 3 -3.00

Description Rental Tracking Code

Quantity (Base)	Qty. to Rent	Qty. to Return
1	0	1
1	0	1
1	0	1

Close

Enter the text **0**.

0 3 -3.00

Description Rental Tracking Code

Quantity (Base)	Qty. to Rent	Qty. to Return
1	0	1
1	0	1
1	0	0

Close

ODT Rentals Online Help

Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return
1	0	1
1	0	1
1	0	0

Close

Click on the cell **Qty. to Return** with the value **0**

✓ **SAVED**

Current Meter Reading	Metered Usage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Return Location Code	Return Bin Code	Retu Loc
0	0	0	3	0	0			
0	0	0	3	0	0		C-002	
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			

Enter the text **2**.

When moving off the field, then the following message will occur.

✓ **SAVED**

Current Meter Reading	Metered Usage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Return Location Code	Return Bin Code	Retu Loc
0	0	0	3	0	0			
0	0	0	3	0	0		C-002	
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			

Click on the button **Yes**

?

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

YesNo



Click on the cell **Partial Return Date** with the value **6/4/2020**

As the Posting Date on the Rental Contract defaults to the Partial Return Date, it is important to review and revise the date. The date should be set to the date the Rental Units are returned.

Metered sage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
0	0	3	2	0	6/4/2020	
0	0	3	0	0		
0	0	1	0	0		
0	0	1	0	0		

Click on the link in cell **Partial Return Date** with the value **6/4/2020**

Metered sage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
0	0	3	2	0	6/4/2020	
0	0	3	0	0		
0	0	1	0	0		
0	0	1	0	0		

Click on the link **Next**

Metered sage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
0	0	3	2	0	6/4/2020	
0	0	3	0	0		
0	0	1	0	0		
0	0	1	0	0		

Click on a date in the calendar

Select the date that the return occurred on.

Metered sage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
0	0	3	2	0	6/4/2020	
0	0	3	0	0		
0	0	1	0	0		
0	0	1	0	0		



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← TO RETURN | WORK DATE: 7/7/2020

Search Edit List **Rental** Open in Excel Actions Navigate

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the navigation menu item **Return Rentals**

s 365 Business Central

← TO RETURN | WORK DATE: 7/7/2020

Search Edit List Rental Open in Excel Actions Navigate Fewer

Item Tracking Lines Bulk Returns **Return Rentals** Return & Print...

Document No. ↑ No. Description Post the return of the rental units on the rental document.

→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRAL
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the field **Posting Date**

The Posting Date should be set to the date the unit or units are returned, if different from the date in the field.

EDIT - RETURN RENTALS

Update Return Date ☐

New Return Date

Posting Date 7/7/2020

Type the date in the format dd/yyyy

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Click on the link **Open the date picker**

NTALS

7/7/2020

Open the date picker

value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be

	Metered Usage Qty.	Qty. to Rent	Qty. on Rent
0	0	0	3
5,000	0	0	1
4,250	0	0	1



ODT Rentals Online Help

Click on a date in the calendar

Update Return Date ☐

View Return Date

Posting Date 7/7/2020

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

Go to today Done Cancel

Click on the button **OK**

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OK Cancel

The following demonstrates the return of the remaining quantity.

Click on **Document No. = RC00015, Rental Unit No. = RU00027, Description = Air Impact Wrench 1 inch Drive**

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16...	CENTR
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/3/2020

Search Edit List Rental Open in Excel Actions Navigat

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16...	CENTR
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST



Click on the navigation menu item **Item Tracking Lines**

Dynamics 365 Business Central

TO RETURN | WORK DATE: 7/3/2020

Search Edit List Rental Open in Excel Actions Navigat

Item Tracking Lines Bulk Returns Return Rentals Return & P

Document view of Edit serial numbers and lot numbers that are assigned to the item on the d

→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST
RC00017	RU00026	Wacker Hammer Drill Bits 3/16...	CENTR
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the cell **Qty. to Return** with the value **0**

0	0	1	0
0	0		
Description		Rental Tracking Code	
Quantity (Base)	Qty. to Rent	Qty. to Return	
1	0	0	
Close			

Enter the text **1**.

0	0	1	0
0	0		
Description		Rental Tracking Code	
Quantity (Base)	Qty. to Rent	Qty. to Return	
1	0	1	
Close			

Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return
1	0	1
Close		



Click on the cell **Qty. to Return** with the value **0**

✓ SAVED								
Current Meter Reading	Metered Usage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code	
0	0	0	1	0	0			
0	0	0	3	0	0			
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			

Enter the text **1**.

✓ SAVED								
Current Meter Reading	Metered Usage Qty.	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code	
0	0	0	1	1	0			
0	0	0	3	0	0			
15,000	0	0	1	0	0			
14,250	0	0	1	0	0			

Click on the navigation menu item popup **Rental**

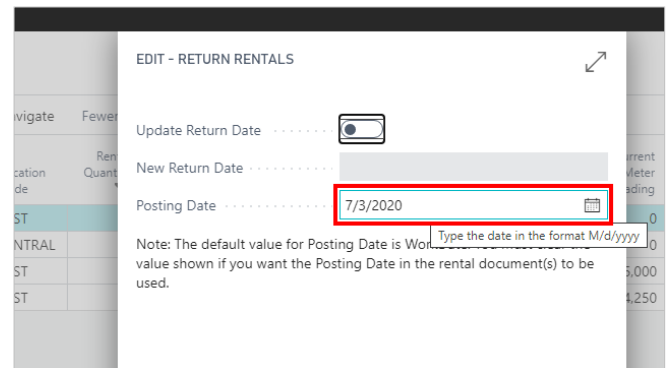
Dynamics 365 Business Central				
← TO RETURN | WORK DATE: 7/3/2020				
Search	Edit List	Rental	Open in Excel	Actions
Document No. ↑	Rental Unit No.	Description	Location Code	
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST	
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA	
RC00018	RU00023-001	Ford 150 Trucks	EAST	
RC00018	RU00023-002	Ford 150 Trucks	EAST	

Click on the navigation menu item **Return Rentals**

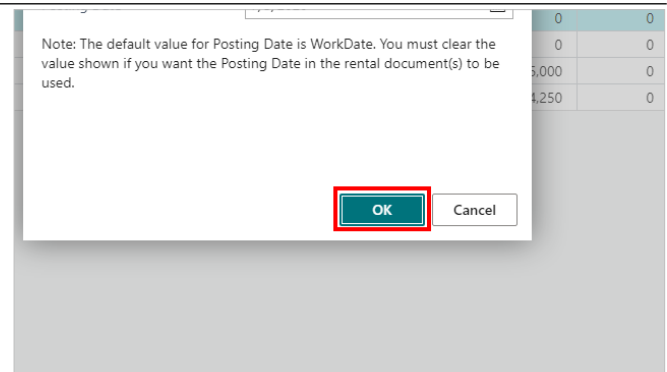
s 365 Business Central				
← TO RETURN | WORK DATE: 7/3/2020				
Search	Edit List	Rental	Open in Excel	Actions
Item Tracking Lines	Bulk Returns	Return Rentals	Return & Print...	
Document No. ↑	No.	Description	Post the return of the rental units on the rental document.	
→ RC00015	RU00027	Air Impact Wrench 1 inch Drive	EAST	
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRAL	
RC00018	RU00023-001	Ford 150 Trucks	EAST	
RC00018	RU00023-002	Ford 150 Trucks	EAST	

Click on the field **Posting Date**

Note that in this example the date is the same as the Rental Return Date on the line, therefore does not require changing as that is the date the remaining unit is being returned on.



Click on the button **OK**



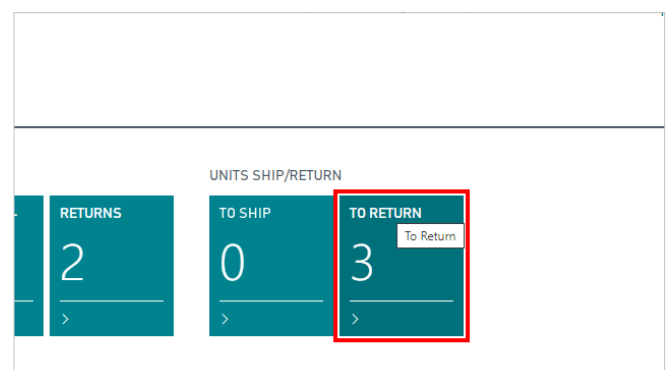
3.16.3.5. Processing Partial Returns for Units Linked to Items in Bins

The following example demonstrates the process for partial returns when Rental Units are linked to Items stored in Bins.

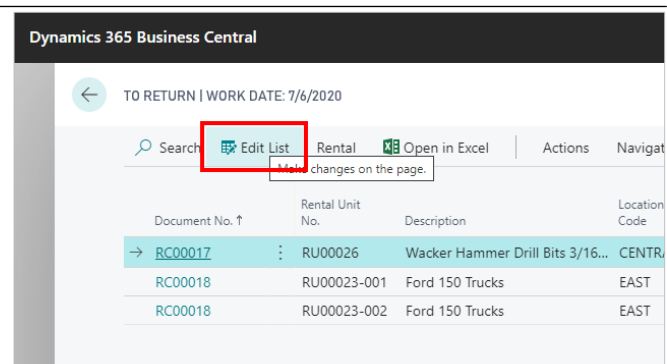
In the example, 2 of the 3 units out on rent are being returned to the same Location but a different Bin than they were shipped from.

When returning the full Rental Quantity for units linked to Items stored in Bins to a single Bin, then the process is to select Rental, Return Rentals, then set the Posting Date to the date of the return and select ok.

Click on the link **To Return 3**



Click on the navigation menu item **Edit List**





Click on **Document No. = RC00017, Rental Unit No. = RU00026, Description = Wacker Hammer Drill Bits 3/16 inch**

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

Click on the cell **Return Bin Code** with the value **C-002**

The Bin Code that the items were picked and shipped from defaults to the Return Bin Code field. When being returned to a different Bin, then the Return Bin Code field must be modified.

Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Billa...
0	0			C-002		✓
0	0			Look up value		✓
0	0					✓

Click on the lookup button in the cell **Return Bin Code**

Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Billa...
0	0			C-00		✓
0	0					✓
0	0					✓

Click on the link in cell **Code** with the value **C-001**

Code ↑	Description
→ C-001	Central Bin C-0
C-00	Select record "C-001"



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
7/7/2020	11:59:59 PM	0	3	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		

Enter the text **2**.

When moving off the field, then the following message will occur.

Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
7/7/2020	11:59:59 PM	0	3	2	0		
7/6/2020	11:59:59 PM	0	1	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		

Click on the button **Yes**

?

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes No

Click on the cell **Partial Return Date** with the value **6/4/2020**

The Partial Return Date defaults from the Rental Contract, Posting Date. If the date is different than the date of the return, then the date must be set to the date of the return.

Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code	Return Bin Code	Return Tempo Location
0	3	2	0	6/4/2020		C-001	
0	1	0	0				Type the date in the format M/d/yyyy
0	1	0	0				



ODT Rentals Online Help

Click on the link in cell **Partial Return Date** with the value **6/4/2020**

	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date	Return Location Code	Return Bin Code	Return Temp Location
PM	0	3	2	0	6/4/2020	C-001		
PM	0	1	0	0				
PM	0	1	0	0				

Click on the link **Next**

Qty. to Return	Qty. Returned	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Bill...
2	0	6/4/2020	C-001			<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>

June 2020

Su Mo Tu We Th Fr Sa Next

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Click on a date in the calendar

Qty. to Return	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Bill...
0	3	2	0	6/4/2020	C-001			
0	1	0	0					
0	1	0	0					

July 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

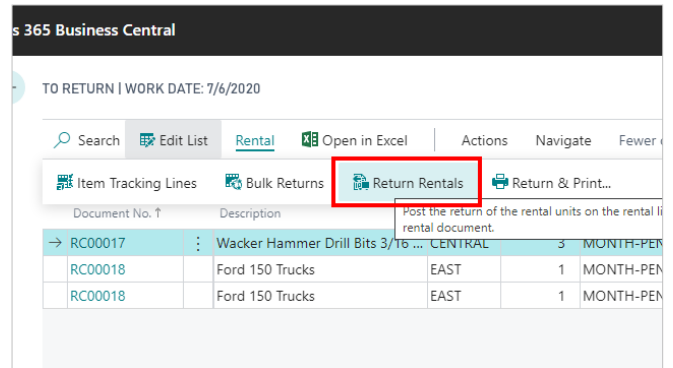
26 27 28 29 30 31

Go to today Done

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central				
TO RETURN | WORK DATE: 7/6/2020				
Search	Edit List	Rental	Open in Excel	Actions
Document No. ↑	Description	Location Code	Rental Quantity	
→ RC00017	Wacker Hammer Drill Bits 3/16 ...	CENTRAL	3	
RC00018	Ford 150 Trucks	EAST	1	
RC00018	Ford 150 Trucks	EAST	1	

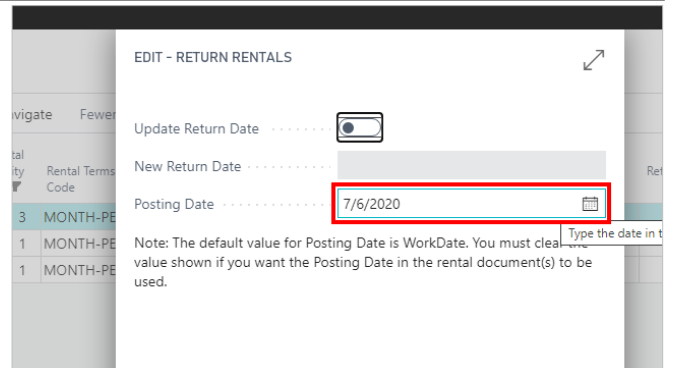
Click on the navigation menu item **Return Rentals**



The screenshot shows the 'Return Rentals' button highlighted with a red box in the navigation menu. The menu includes options like 'Search', 'Edit List', 'Rental', 'Open in Excel', 'Actions', 'Navigate', and 'Fewer'. Below the menu, there are tabs for 'Item Tracking Lines', 'Bulk Returns', 'Return Rentals', and 'Return & Print...'. The 'Return Rentals' tab is selected and highlighted with a red box. A tooltip is visible over the 'Return Rentals' tab, stating: 'Post the return of the rental units on the rental document.'

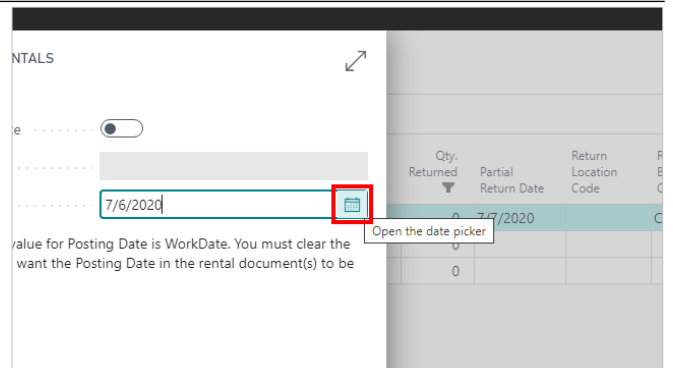
Click on the field **Posting Date**

The Posting Date should be set to the date the unit or units are returned, if different from the date in the field.



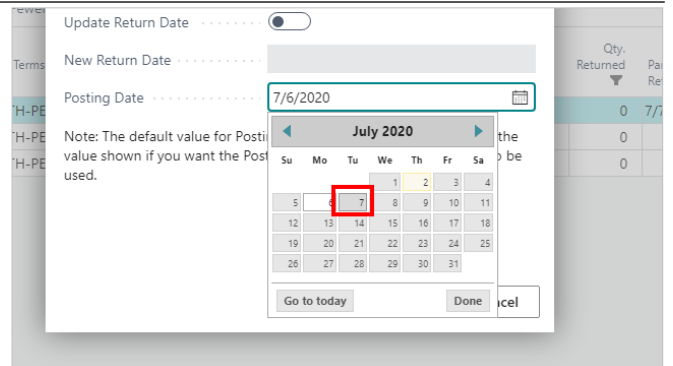
The screenshot shows the 'EDIT - RETURN RENTALS' form. The 'Posting Date' field is highlighted with a red box and contains the date '7/6/2020'. A tooltip is visible over the 'Posting Date' field, stating: 'Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.'

Click on the link **Open the date picker**



The screenshot shows the 'EDIT - RETURN RENTALS' form. The 'Open the date picker' link is highlighted with a red box. A tooltip is visible over the 'Open the date picker' link, stating: 'Open the date picker'.

Click on a date in the calendar



The screenshot shows the date picker calendar. The date '7/6/2020' is highlighted with a red box. The calendar is for July 2020, showing days from Sunday to Saturday. The date '7/6/2020' is highlighted with a red box. A tooltip is visible over the date '7/6/2020', stating: 'Open the date picker'.



ODT Rentals Online Help

Click on the button **OK**

Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.

OKCancel

Click on the cell **Qty. on Rent** with the value **1**

al Start	Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Re Lo Co
2020	7/7/2020	11:59:59 PM	0	1	0	0		
2020	7/6/2020	11:59:59 PM	0	1	0	0		
2020	7/6/2020	11:59:59 PM	0	1	0	0		

Click on the cell **Qty. to Return** with the value **0**

Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
7/7/2020	11:59:59 PM	0	1	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		

Enter the text **1**.

Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
7/7/2020	11:59:59 PM	0	1	1	0		
7/6/2020	11:59:59 PM	0	1	0	0		
7/6/2020	11:59:59 PM	0	1	0	0		



Click on the cell **Return Bin Code**

Select the Bin Code that the rental items are being returned to. If left blank, then the rental items will be returned to the Default Bin Code, when the Rental Unit is returned.

Qty. to Return	Qty. Returned	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Billa...
0	0			<div>Look up value</div>		<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>

Click on the lookup button in the cell **Return Bin Code**

Qty. to Return	Qty. Returned	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Ret... Day Billa...
0	0			<div>8/25/2020</div>		<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>
0	0					<input checked="" type="checkbox"/>

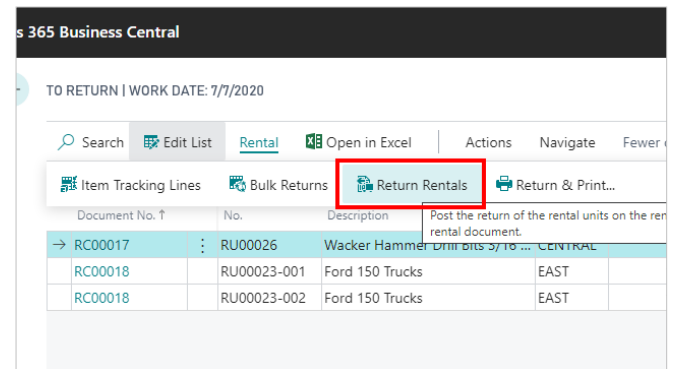
Click on the link in cell **Code** with the value **C-002**

Code	Description
C-001	Central Bin C-0
C-002	Central Bin C-0

Click on the navigation menu item popup **Rental**

Document No.	Rental Unit No.	Description	Location Code
RC00017	RU00026	Wacker Hammer Drill Bits 3/16 ...	CENTRA
RC00018	RU00023-001	Ford 150 Trucks	EAST
RC00018	RU00023-002	Ford 150 Trucks	EAST

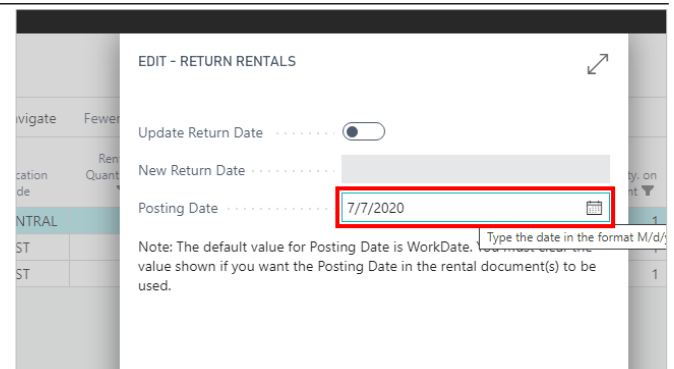
Click on the navigation menu item **Return Rentals**



The screenshot shows the 'Return Rentals' button highlighted with a red box in the 'Return Rentals' section of the software interface. The interface includes a search bar, 'Edit List', 'Rental', 'Open in Excel', and 'Actions' tabs. Below these are 'Item Tracking Lines', 'Bulk Returns', 'Return Rentals', and 'Return & Print...' buttons. A table below shows rental units with columns for Document No., No., Description, and Post the return of the rental units on the rental document.

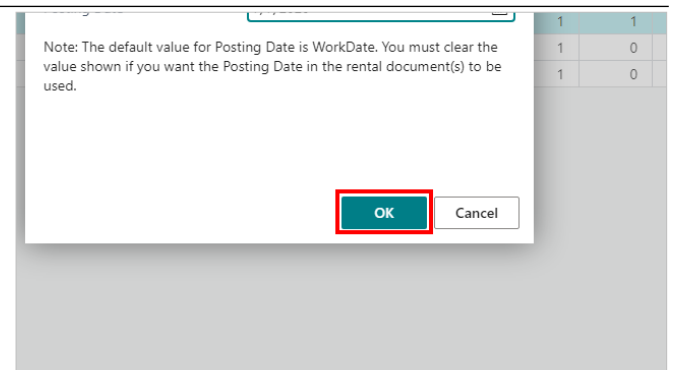
Click on the field **Posting Date**

Review the Posting Date, and if required, change the date to the actual date the Rental Unit is being returned.



The screenshot shows the 'EDIT - RETURN RENTALS' dialog box. It has fields for 'Update Return Date' (with a toggle switch), 'New Return Date', and 'Posting Date'. The 'Posting Date' field is highlighted with a red box and contains the date '7/7/2020'. A note at the bottom states: 'Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.'

Click on the button **OK**



The screenshot shows the 'OK' button highlighted with a red box in the dialog box. The dialog box also contains a 'Cancel' button and a note: 'Note: The default value for Posting Date is WorkDate. You must clear the value shown if you want the Posting Date in the rental document(s) to be used.'

3.17.Parital Shipments and Returns

3.17.1. Partial Shipments and Returns Overview

3.17.1.1. Overview

The entry of Rental Units with a Rental Quantity greater than one on Rental Quotes and Rental Contracts is dependent on the Allow Overbooking feature.

Rental units assigned to a group, are not allowed to have a Rental Quantity greater than one entered on quotes and contracts.

On Rental Management Setup, when the field Allow Unit Overbooking is checked, then all units not assigned to a Rental Unit Group can by default have a Rental Quantity entered that is greater than one. Also when the field is checked, then the field is not displayed on the Rental Unit cards.

If on Rental Management Setup, the field Allow Unit Overbooking is not checked, then the field is displayed on the Rental Unit cards. The organization can then select which specific units are allowed to be overbooked. When checked on the unit, the Rental Quantity on the Rental Line of a quote or contract can be greater than one.

The single units linked to a Fixed Asset, Resource or G/L Account or is not linked, must have the Allow Overbooking field checked in order to enter a Rental Quantity greater than one.



The Item Availability applies to Rental Units linked to Items and manages the availability, therefore the Allow Overbooking feature does not apply to these units.

Only with single units not assigned to a group, can partial shipments and partial returns be processed.

Partial Shipments:

For a unit linked to an item there are required setups to be configured in order to enter and process the quotes and contracts. Rental Units can be linked to Items, Items with Serial No. and/or Lot Tracking and Items stored in Bins.

To learn about these required setups, please see the help, Processing Rentals, Rental Contracts with Rental Units Linked to Items.

When the Qty. to Rent on the Rental Line is modified to specify that only a portion of the units are to be shipped, then the rental line will be split into two lines. One line having the Rental Quantity and Qty. to Rent as specified in the Qty. to Rent for the partial shipment. The other Rental Line will have the remainder of the quantity yet to be shipped.

Partial Returns:

When on a contract the Rental Quantity and Qty. on Rent are greater than one, and the Qty. to Return is modified to specify that only a portion of the units are to be returned, then the field Partial Return Date must be populated.

When the return is posted, then the Rental Line will be split into two lines. One having the quantities equal to the number returned and the other with the number still out on rent. This updates the Rental Amount lines, which is what is used to bill customers. The Rental Amount lines are then split between the rental lines to reflect the correct amounts previously billed and generated the new lines for the quantity still out on rent.

In addition, the related Rental Value Entries related to any posted invoices are updated with split records, based on the Rental Amount Line splitting between the rental lines.

When locations are used with rentals, then the partial returns allows for the returning of units to different rental locations or to a temporary rental location.

To learn about returning units to a different or temporary rental location, see ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location.

NOTES

The partial shipments and partial returns can as well be completed from the To Ship and To Return cue lists.

To learn about processing partial shipments and partial returns from the To Ship and To Return cue lists, see ODT Rental Online Help, Processing Rentals, Pending Shipments and Returns.

3.17.2. How to Process Partial Shipments and Returns

3.17.2.1. Overview

The following examples are based on the Rental Management Setup, Allow Unit Overbooking not being checked, and the units to be entered on the line, do have the Allow Overbooking field checked.

3.17.2.2. Setups for Partial Shipments and Returns

For Rental Units not linked to a master card, a unit must be created that is not assigned to a group. The Allow Overbooking field must be checked and Rental Prices can be setup on the unit or entered on the rental line.

The following example demonstrates these setups.



Profile – Business Manager

Double click on the navigation menu item **Rental Units**

Self-Service ▾

redit Memos Sales Return Orders Items Customers Item Journals Sales Journals

ACTIONS

+ Sales Quote + Sales Return Order + Rental Contract > Sales

+ Sales Invoice + Sales Credit Memo + Rental Units > Reports

+ Sales Order + Rental Quote > Tasks > Rental Management

Create a new rental unit.

Click on the field **No.**

Rental Unit Card

Process Rental Page Actions Navigate Less options

Copy Rental Unit...

General

No. ...

Description ...

Serial No. ...

Location Code ...

Press the **Enter** key.

Rental Unit Card

Process Rental Page Actions Navigate Less options

Copy Rental Unit...

General

No. ...

Description ...

Serial No. ...

Location Code ...

Enter the text **16 G Brad Nailers**.

Rental Unit Card

Process Rental Page Actions Navigate Less options

Copy Rental Unit...

General

No. RU00013 ...

Description 1 ...

Serial No. ...

Location Code ...



ODT Rentals Online Help

Click on the field **Serial No.**
Enter a Serial No., if applicable.

Copy Rental Unit...

General

No. RU00013 ...

Description 16 G Brad Nailers

Serial No.

Location Code ▾

Posting

Gen. Prod. Posting Group ▾

Click on the field **Location Code**

General

No. RU00013 ...

Description 16 G Brad Nailers

Serial No.

Location Code ▾

Posting

Gen. Prod. Posting Group ▾

Tax Group Code ▾

Click on **Code = EAST, Name = East Warehouse**

Description 16 G Brad Nailers

Serial No.

Location Code ▾

Posting

CODE	NAME
EAST	East Warehouse
RENTALGROUP	Inventory Items Re
WEST	West Warehouse
+ New	

Gen. Prod. Posting Group ▾

Tax Group Code ▾

Rental

Click on the field **Gen. Prod. Posting Group**

Serial No.

Location Code EAST ▾

Posting

Gen. Prod. Posting Group ▾

Tax Group Code ▾

Rental

Group ▾



Click on **Code = RETAIL**, **Description = Retail**

Posting

Gen. Prod. Posting Group

Tax Group Code

Rental

Group

Group No.

Sub Rental ☐

Allow Overbooking ☐

CODE	DESCRIPTION
NO TAX	Miscellaneous with
RETAIL	Retail
SE	Resources, etc.

+ New

Select record "RETAIL"

Click on the field **Tax Group Code**

Location Code EAST

Posting

Gen. Prod. Posting Group RETAIL

Tax Group Code

Rental

Group ☐

Group No.

Click on **Code = SUPPLIES**, **Description = Taxable Olympic Supplies**

Tax Group Code

Rental

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

CODE	DESCRIPTION
FURNITURE	Taxable Olympic Fu
LABOR	Labor on Job
MATERIALS	Taxable Raw Mater
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Su

+ New

Select record "SUPPLIES"

Click on **Allow Overbooking, No**

Rental

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00



Click on the field **Rental Terms Code**

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Click on **Code = MONTH-PEND, Description = Monthly Rental - Per. Billing in Arrears**

Gen. Prod. Posting Group RETAIL

Tax Group Code SUPPLIES

Rental	CODE	DESCRIPTION
	MONTH-END-OP...	Monthly Rental for C
	MONTH-END-OP...	Monthly Rental for C
Group	MONTH-PEND	Monthly Rental - Per
Group No.	MONTH-PEND-FA...	Monthly Rental - Ear
Sub Rental	MONTH-PSTART	Monthly Rental - Per
Allow Overbooking	MONTH-PSTART-EA...	Monthly Rental - Ear
Rental Terms Code	+ New	

Click on the field **Minimum Rental Duration**

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code MONTH-PEND

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Enter the text **1 day**.

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code MONTH-PEND

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Once the unit has been setup, then the Rental Price(s) can be configured. This will then default the price to the Rental Line when the unit and term has been entered on the line.

This is not mandatory.

Should there not be a price card setup for any or all terms on the Rental Unit, the Rental Unit Price can be entered on line, after entering the Rental Unit and any term on the line.



Setup all applicable prices that apply to the unit being setup, if the organization requires the price cards be setup.

The following steps demonstrate the setting up of a rental price on the new unit.

Click on the navigation menu item popup **Rental**

Dynamics 365Business CentralRU00013 · 16 G Brad Nailers

←

RU00013 · 16 G Brad Nailer

Process

Rental

Page

Actions

Navigate

Copy Rental Unit...

General

No.RU00013

Click on the navigation menu item **Rental Prices**

Dynamics 365Business CentralRU00013 · 16 G Brad Nailers

←

RU00013 · 16 G Brad Nailer

Process

Rental

Page

Actions

Navigate

Rental Prices

Attributes

Additional Notes

Set up different rental prices. A rental price is automatically granted on rental line.

General

No.RU00013

Description16 G Brad Nailers

Click on the navigation menu item **New**

RU00013 · 16 G Brad Nailer | Work Date: 6/11/2021

Rental Price List

Search

+ New

Edit List

Delete

Edit

General

Rental Term FilterStarting Date Fil

Sales Type FilterCurrency Code F

Sales Code Filter

Click on the field **Rental Terms Code**

RU00013

Pro

All

Tax

Re

Re

0.00

Never



Click on **Code = MONTH-PEND, Description = Monthly Rental - Per. Billing in Arrears**

RU00013

Terms Code

ing Date

g Date

nize

CODE	DESCRIPTION
MONTH-END-OPT...	Monthly Rental for C
MONTH-END-OPT...	Monthly Rental for C
MONTH-PEND	Monthly Rental - Per
MONTH-P	Select record "MONTH-PEND" Rental - Ear
MONTH-PSTART	Monthly Rental - Per
MONTH-PSTART-EA...	Monthly Rental - Ear

age Waiver

age Waiver Billing

Click on the field **Price**

TH-PEND

Price 0.00

Optimize Never

Prorate Never

Allow Line Disc.

Tax Group Code

Enter the text **500**.

TH-PEND

Price 0.00

Optimize Never

Prorate Never

Allow Line Disc.

Tax Group Code

Click on the field **Tax Group Code**

Never



ODT Rentals Online Help

Click on **Code = SUPPLIES**, Description = **Taxable Olympic Supplies**

Group Code	
Terms Code Alt1	
Terms Code Alt2	
Age Waiver Allow Line Disc.	
Age Waiver Tax Group Code	

CODE	DESCRIPTION
FURNITURE	Taxable Olympic Fu
LABOR	Labor on Job
MATERIALS	Taxable Raw Mater
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Su

+ New Select record "SUPPLIES"

Click on the back button

Business Central

Rental Price Card | Work Date: 6/11/2021

RU00013 · 16 G B

Rental Price Li

RU00013 · MON

General

No. RU00013

Rental Terms Code MONTH-PEND

Sales Type All Customers

Click on the back button

Business Central

Rental Price Card | Work Date: 6/11/2021

RU00013 · 16 G Brad Nailer

Rental Price List Search + Ne

General

Rental Term Filter

Sales Type Filter None

Sales Code Filter

Click on the back button

Dynamics 365 Business Central RU00013 · 16 G Brad Nailers

Back RU00013 · 16 G Brad Nailer

Process Rental Page Actions Navigate

Rental Prices Attributes Additional Notes

General

No. RU00013

Once the unit has been setup, then the Rental Price(s) can be configured. This will then default the price to the Rental Line when the unit and term has been entered on the line.

This is not mandatory. Should there not be a price card setup for any or all terms on the unit, then the user can after entering the unit and any term, then can enter the Rental Unit price on line of a quote or contract.

Setup all applicable prices that apply to the unit being setup, if the organization requires the price cards be



setup.

The following steps demonstrate the setting up of a rental price on the new unit.

NOTE:
In order to process partial shipments and returns for units linked to a Fixed Asset, Resource or G/L Account, these master cards must exist or be setup. Then on the unit cards the Link Type and Link Code fields must be setup. All other setups are the same as the above example.

The setup partial shipments and returns for units linked to Items will not be demonstrated at this time, as this is related to another feature, Item Availability and Rental Units. Information related to the setups for units linked to items is located in the Processing Rentals, Rental Contracts book in the online help.

3.17.2.3. **How to Process Partial Shipments**

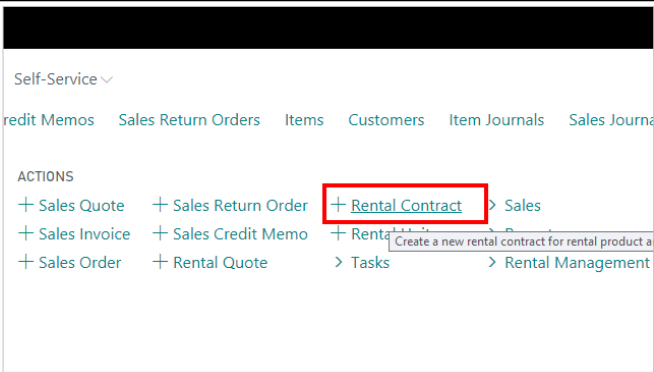
Profile - Sales Order Processor

The following steps can as well be completed from the Business Manager Profile.

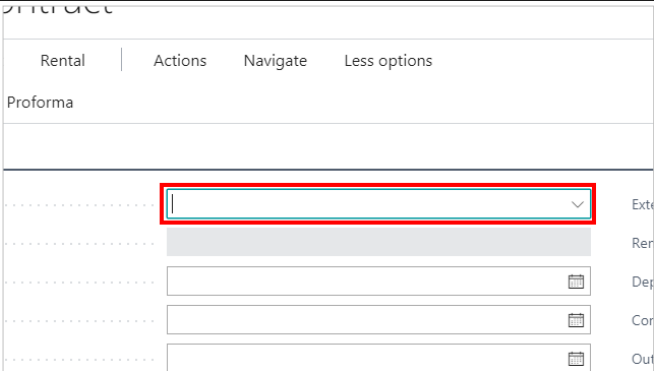
In this example the partial shipment feature is demonstrated with a Rental Unit, which is not linked to a master record.

On the contract rental line the Rental Quantity entered is three. Two of the units will be shipped on the order date and the other will be shipped on the following day.

Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**





ODT Rentals Online Help

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Print... Print Proforma

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Trey Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Rental Lines | [Manage](#) | More options + New

Click on the cell **Rental Unit No.**

Rental Lines | [Manage](#) | More options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | [Manage](#)

Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines | [Manage](#) | More options

New Line Delete Line Expand All Collaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Look up value

Sales Lines | [Manage](#) | More options

Click on **No. = RU00013**, **Description = 16 G Brad Nailers**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

NO. DESCRIPTION

PG-001 Portable Generators

RU00013 16 G Brad Nailers

BD Select record "RU00013" Buckeye Ditcher

RU00001 Buckeye Ditcher Group

RU00002 Buckeye Ditcher

RU00003 Buckeye Ditcher

+ New



ODT Rentals Online Help

Click on the cell **Rental Quantity**

More options					
Group Avail Matrix					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
E	16 G Brad Nailers	MONTH-PEND	1	EAST	
UNIT OF					

Enter the text **3**.

More options					
Group Avail Matrix					
ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
E	16 G Brad Nailers	MONTH-PEND	3	EAST	
UNIT OF					

Click on the cell **Qty. to Rent**

More options					
Group Avail Matrix					
RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
500.00	0.00	0.00	3	0	0
UNIT OF					

Enter **Qty. to Rent**. Press the **Arrow down** key.

More options					
Group Avail Matrix					
RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
500.00	0.00	0.00	2	0	0
UNIT OF					



ODT Rentals Online Help

Click on the button **Yes**

Contract Total

?

A partial shipment for Rental Line 0 will result in the line to be split to respect the settings for Rental Unit RU00013. Do you want to continue?

Yes No

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	DISCOUNT	LINE
0.00	3	0	0	0		

Click on the cell **Qty. to Rent**

To have the second rental line not be shipped when posting the shipment of the first line the Qty. to Rent must be set to 0.

tions Less options

il Matrix

RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
500.00	0.00	0.00	1	0	0
500.00	0.00	0.00	2	0	0

Enter **Qty. to Rent**.

tions Less options

il Matrix

RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
500.00	0.00	0.00	1	0	0
500.00	0.00	0.00	2	0	0

Click on the navigation menu item **Ship Rentals**

Dynamic 360 Business Central Finance & Analytics

RENTAL CONTRACT

Rental Contract · RC00021

Process Contract Rental Actions Navigation

Ship Rentals Return Rentals Invoice Invoicing

Post the shipment of the rental units on the rental lines. A posted delivery

General

Sell-to Customer Name Adatum Corporation

Quote No.



ODT Rentals Online Help

Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT
0.00	0	0	0	0	
0.00	2	0	0	0	

Click on the button **OK**

Shipment Posted Successfully.

OK

RENTAL PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...
0.00	0	0	0	0	0	<input checked="" type="checkbox"/>
0.00	2	0	0	0	0	<input checked="" type="checkbox"/>

Click on the cell **Qty. to Rent**

The system automatically resets the Qty. to Rent on the second line when the posting of the shipment of the first line is completed.

Less options

Avail Matrix

RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
500.00	0.00	0.00	1	0	0
500.00	0.00	0.00	0	2	0

Click on the cell **Rental Start Date**

Rental Lines | [Manage](#) | Line | Functions | Less options

[New Line](#) [Delete Line](#) [Group Avail Matrix](#)

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT
RU00013	4/9/2018	5/8/2018	500.00	
RU00013	4/9/2018			

Type the date in the format M/d/yyyy

Sales Lines | [Manage](#)



ODT Rentals Online Help

Click on the link in cell **Rental Start Date**

As the second rental line is being shipped on a different date, the Rental Start date should be revised to reflect the date the rental is to commence.

The screenshot shows the 'Rental Lines' table with columns: RENTAL UNIT NO., RENTAL START DATE, RENTAL RETURN DATE, RENTAL UNIT PRICE, and ALT UNIT PRICE. The first line (RU00013) has a start date of 4/9/2018 and a return date of 5/8/2018. The second line (RU00013) has a start date of 4/9/2018 and a return date of 5/8/2018. The 'Rental Start Date' for the second line is highlighted with a red box, and a calendar icon is visible next to it.

Click on a date in the calendar

The screenshot shows the 'Rental Lines' table with the same data as the previous screenshot. A calendar is open for the 'Rental Start Date' field of the second line, showing the month of April 2018. The date 4/10/2018 is highlighted with a red box, indicating it is the selected date.

Click on the field **Posting Date**

As the second rental line is being shipped on a different date, the Posting Date must be changed to reflect date the shipment is occurring on.

The screenshot shows the 'Posting Date' field with a date picker. The date 4/9/2018 is entered, and a red box highlights the date field. A calendar icon is visible next to the date field.

Click on the link

The screenshot shows the 'Posting Date' field with a date picker. The date 4/9/2018 is entered, and a red box highlights the date field. A calendar icon is visible next to the date field.



Click on a date in the calendar

Click on the navigation menu item **Ship Rentals**

Click on the button **Yes**

Click on the button **OK**

The contract can now continue to be processed as per the standard processing for rentals.

3.17.2.4. How to Process Partial Returns

Profile - Sales Order Processor

The following steps can as well be completed from the Business Manager Profile.

In this example, a Rental Contract with a Rental Unit not linked to a master record demonstrates the partial returns feature. On the contract line, both the Rental Quantity and Qty. on Rent are three.



The contract is for two rental periods, where the rental has been shipped and the first rental period has been billed to the customer.

After invoicing the first rental period, two of the three units will be returned. The remaining unit will remain on rent until the end of the second rental period, being invoiced and returned at that time.

The next steps are provided to show the Rental Amount Lines and Rental Value Entries for the invoice that was posted.

Thus providing a reference to compare to, after the partial return has been posted.

Click on the navigation menu item **More options**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
RU00013	4/9/2018	6/8/2018	500.00	0.00

Click on the navigation menu item popup **Line**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
RU00013	4/9/2018	6/8/2018	500.00	0.00

Click on the navigation menu item **Rental Amount Lines**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	6/8/2018	500.00



ODT Rentals Online Help

Click on the cell **Invoice No.** with the value **RI00026**

Note the record for the first rental period has been billed for a quantity of three, and the Invoice No. field displays the invoice number.

TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026
0.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	RI00026

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026
0.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Close

Click on the navigation menu item **Rental Value Entries**

Manage Line Functions Less options

Amount Lines Rental Ledger Entries Rental Value Entries Additional Notes

View the rental value entries for the selected date range.

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO
4/9/2018	6/8/2018	500.00	0.00	0.00	3

Click on the cell **Quantity** with the value **3**

PRICE LINE NO.	CR. MEMO NO.	CR. MEMO LINE NO.	QUANTITY	UNIT PRICE
10000		0	3	500.00



ODT Rentals Online Help

Click on the cell **Amount Including Tax** with the value **1,530.00**

QTY	UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX	ENTRY NO.
3	500.00	1,500.00	1,530.00	74

The value entry for the first invoice has a quantity of 3 and the Amount Incl. Tax is for the quantity of 3.

Click on the button **Close**

QTY	UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX	ENTRY NO.
3	500.00	1,500.00	1,530.00	74

The next steps demonstrate the process for partial returns.

Click on the cell **Qty. to Return**

ALT2 RENTAL	UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	3	0	0	0	0

Enter the text **2**. Press the **Arrow down** key.

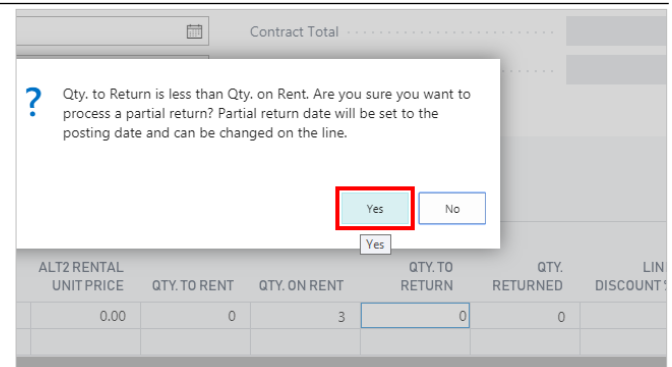
ALT2 RENTAL	UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %
0.00	0	3	2	0	0	0

The following pop-up will occur requiring confirmation that a partial return is desired.

Select Yes, to continue with processing the partial return.

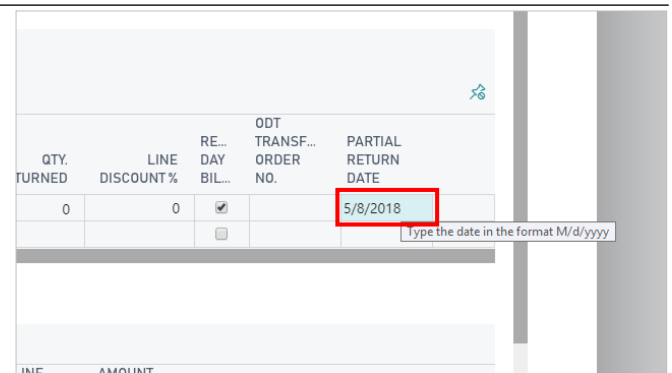
Select No, to abort the process when a partial return is not wanted.

Click on the button **Yes**



Click on the cell **Partial Return Date**

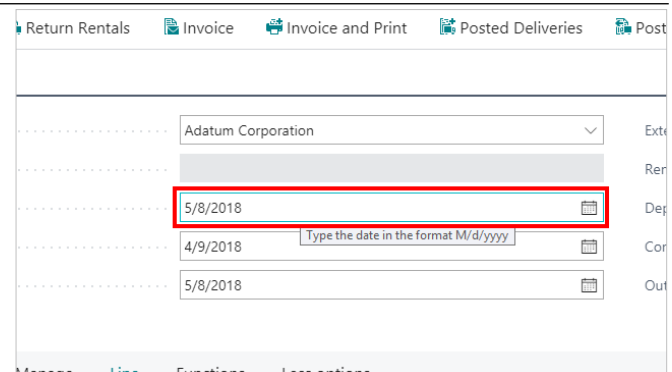
Verify the Partial Return Date and if needed, change the date to the date the partial return is occurring on.



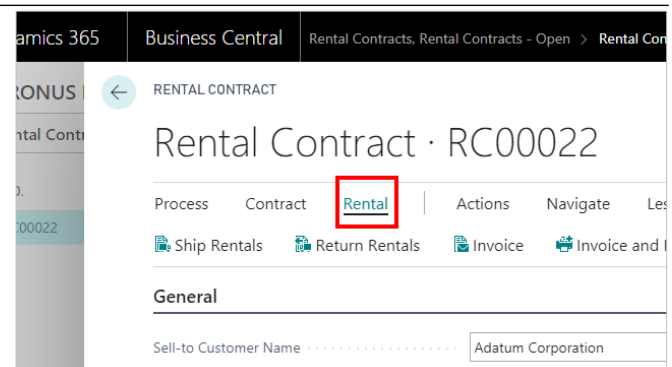
Click on the field **Posting Date**

Verify the Posting Date is correct.

This date has to be at least equal to the Partial Return. This is the date that will be on all entries created when posting the partial return.



Click on the navigation menu item popup **Rental**





Click on the navigation menu item **Return Rentals**

CRONUS RENTAL CONTRACT

Rental Contract · RC00022

Process Contract **Rental** Actions Navigate

Ship Rentals **Return Rentals** Invoice Invoice

Post the return of the rental units on the rental

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

? Are you sure you want to Return this rental contract?

Yes No

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE
0.00	0	3	2	0	

Click on the button **OK**

Return Posted Successfully.

OK

ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE	RE...
0.00	0	3	2	0	0	DAY BIL...

When the line splitting occurs the previously posted invoice or invoices are allocated to each of the rental lines based on the quantity on the split lines.

The following steps demonstrate the results of the line splitting that occurs when posting a partial return. Both lines are shown with the key fields displayed.

Click on the cell **Rental Quantity**

[Line](#)

Functions

Less options

Rental Ledger Entries

Rental Value Entries

Additional Notes

ID	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	16 G Brad Nailers	MONTH-PEND	2	EAST	
	16 G Brad Nailers	MONTH-PEND	1	EAST	



ODT Rentals Online Help

Click on the cell **Qty. on Rent** with the value **0**

Options						
Total Value Entries			Additional Notes			
ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	
0.00	0.00	0	0	0	2	
0.00	0.00	0	0	0	0	

Click on the cell **Qty. Returned** with the value **2**

Additional Notes						
QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	ODT TRANS ORDER NO.
0	0	0	2	0	<input checked="" type="checkbox"/>	
0	1	0	2	0	<input checked="" type="checkbox"/>	

Click on the cell **Qty. on Rent** with the value **1**

Options						
Total Value Entries			Additional Notes			
ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	
0.00	0.00	0	0	0	2	
0.00	0.00	0	1	0	0	

The next steps are provided to show the, Rental Amount Lines and Rental Value Entries for the invoice that was posted prior to the partial return.

Thus demonstrating what occurs when a partial return is posted.

The splitting enables the unit still on rent to be subsequently invoiced.
When the splitting occurs the initial records in the Rental Amount Lines and Rental Value Entries are split to reflect the quantity and dollars applicable to each rental line.



Click on the cell **Rental Unit No.**

Rental Lines

Manage

Line

Functions

Less

Rental Amount Lines

Rental Ledger Entries

Rental Value Entries

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00
RU00013	4/9/2018	6/8/2018	500.00

Sales Lines

Manage

Click on the navigation menu item popup **Line**




Quote No.		
Posting Date		5/8/2018
Order Date		4/9/2018
Document Date		5/8/2018

Rental Lines	Manage	Line	Functions	Less options
Rental Amount Lines	Rental Ledger Entries	Rental Value Entries		

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00	0.00

Click on the navigation menu item **Rental Amount Lines**

Posting Date	5/8/2018
Order Date	4/9/2018
Document Date	5/8/2018

Rental Lines	Manage	Line	Functions	Less
 Rental Amount Lines	 Rental Ledger Entries	 Rental Value Entries		

View the rental amount line records that will be billed for the selected rental unit

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00
RU00013	4/9/2018	6/8/2018	500.00

Click on the cell **Extended Quantity** with the value **2**

Note that on the first rental line, the Rental Amount Line record has the Extended Quantity set to 2.

RENTAL SERVICE			
START DATE-TIME	ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX
12:00 AM	5/8/2018 11:59 PM	2	500.00



ODT Rentals Online Help

Click on the cell **Amount Including Tax** with the value **1,020.00**

Note that on the first rental line, the Rental Amount Line record, the Amount Including Tax displays the appropriate revenue when the Extended Quantity is set to 2.

UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE
500.00	1,000.00	1,020.00	SUPPLIES

Click on the cell **Invoice No.** with the value **RI00026**

Note that the Invoice No. retains the Invoice No. and the line has the Billed field checked.

NG TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026
				Close
				Close
				4,080.00

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00
RU00013	4/9/2018	6/8/2018	500.00



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote NO.

Posting Date 5/8/2018

Order Date 4/9/2018

Document Date 5/8/2018

Rental Lines | Manage | **Line** | Functions | Less options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00	0.00

Click on the navigation menu item **Rental Amount Lines**

Order Date 4/9/2018

Document Date 5/8/2018

Rental Lines | Manage | **Line** | Functions | Less

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

View the rental amount line records that will be billed for the selected rental unit.

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00
RU00013	4/9/2018	6/8/2018	500.00

Click on the cell **Extended Quantity** with the value **1**

Note that on the second rental line, the Rental Amount Line record has the Extended Quantity set to 1.

START DATE-TIME	ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX
12:00 AM	5/8/2018 11:59 PM	1	500.00
12:00 AM	6/8/2018 11:59 PM	1	500.00

Click on the cell **Amount Including Tax** with the value **510.00**

Note that on the second rental line, the Rental Amount Line record, the Amount Including Tax displays the appropriate revenue when the Extended Quantity is set to 1.

UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	AMOUNT INCLUDING TAX	TAX GROUP CODE
500.00	500.00	510.00	SUPPLIES
500.00	500.00	510.00	SUPPLIES



ODT Rentals Online Help

Click on the cell **Invoice No.** with the value **RI00026**

Note that the Invoice No. retains the Invoice No. and the line has the Billed field checked.

NG	TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
0.00		SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026
0.00		SUPPLIES	6/8/2018	<input type="checkbox"/>	RI00026

Click on the button **Close**

0.00		SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00026
0.00		SUPPLIES	6/8/2018	<input type="checkbox"/>	

Close

The following show what occurs Rental Value Entry for the previously posted invoice.

Note that the value entries mirror the changes which occurred on the Rental Amount Lines when the splitting occurred.

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00
RU00013	4/9/2018	6/8/2018	500.00

Click on the navigation menu item popup **Line**

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT RENTAL UNIT PRICE
RU00013	4/9/2018	5/8/2018	500.00	0.00



ODT Rentals Online Help

Click on the navigation menu item **Rental Value Entries**

4/9/2018

5/8/2018

Manage Line Functions Less options

Amount Lines Rental Ledger Entries **Rental Value Entries** Additional Notes

View the rental value entries for the selected rental

	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY. TO
3	4/9/2018	5/8/2018	500.00	0.00	0.00	
3	4/9/2018	6/8/2018	500.00	0.00	0.00	

Click on the cell **Invoice No.** with the value **RI00026**

Open in Excel Actions Navigate Less options

TAL DOC.	NO.	SERIAL NO.	INVOICE NO.	INVOICE LINE NO.	CR. MEMO N
022	RU00013		RI00026	10000	

Click on the cell **Quantity** with the value **2**

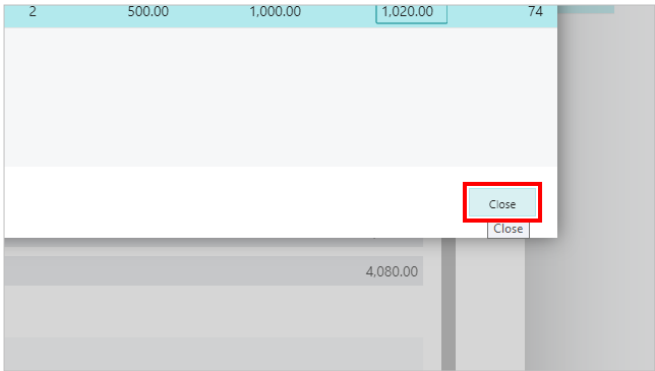
INVOICE LINE NO.	CR. MEMO NO.	CR. MEMO LINE NO.	QUANTITY	UNIT PRICE
10000		0	2	500.00

Click on the cell **Amount Including Tax** with the value **1,020.00**

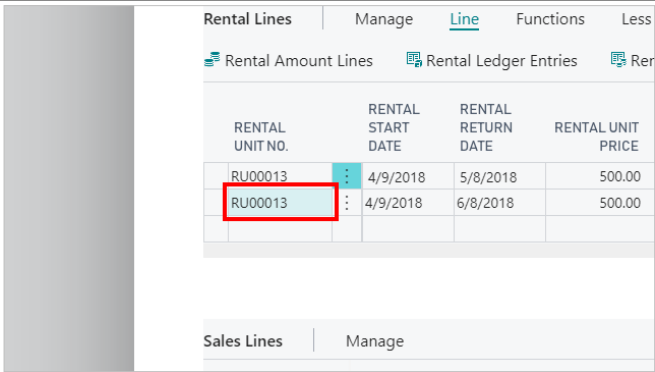
QUANTITY	UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX	ENTRY NO.
2	500.00	1,000.00	1,020.00	74



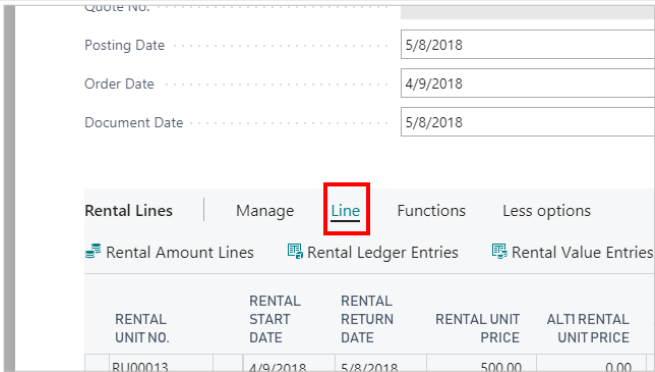
Click on the button **Close**



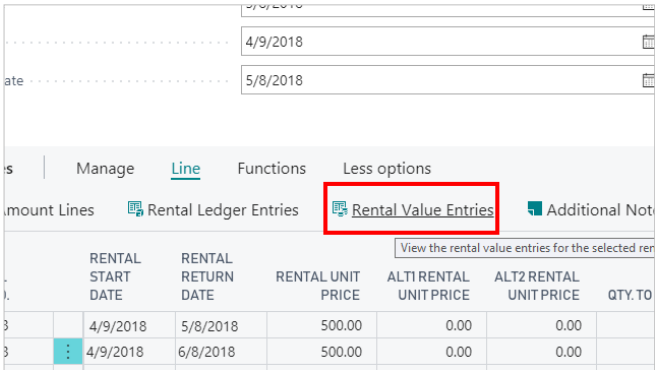
Click on the cell **Rental Unit No.**



Click on the navigation menu item popup **Line**



Click on the navigation menu item **Rental Value Entries**





Click on the cell **Invoice No.** with the value **RI00026**

Open in Excel | Actions | Navigate | Less options					
FAL DOC.	NO.	SERIAL NO.	INVOICE NO.	INVOICE LINE NO.	CR. MEMO NO.
022	RU00013		RI00026	10000	

Click on the cell **Quantity** with the value **1**

INVOICE LINE NO.	CR. MEMO NO.	CR. MEMO LINE NO.	QUANTITY	UNIT PRICE
10000		0	1	500.00

Click on the cell **Amount Including Tax** with the value **510.00**

QUANTITY	UNIT PRICE	AMOUNT	AMOUNT INCLUDING TAX	ENTRY NO.
1	500.00	500.00	510.00	75

Click on the button **Close**

1	500.00	500.00	510.00	75
				Close
				Close
				4,080.00

The Rental Line with the Qty. on Rent of 1 can continue to be invoiced for additional rental period using the standard rental processing procedures.

3.17.3. Processing Partial Shipments or Returns for Units Linked to SN Items

3.17.3.1. Overview

When Rental Units are linked to Items that are serialized, then as with selling serialized items, the Serials Nos. must be selected in the Item Tracking Entries.



For rentals, the selected Serial Nos. are to be equal to the Rental Quantity on the line.

For additional information on Rental Units linked to serialized Items, see ODT Rental Online Help, Processing Rentals, Rental Contract with Rental Units Linked to Items.

Partial Shipments

When processing a partial shipment of a Rental Unit linked to a serialized Item, the Serial Nos. should not be selected on the Item Tracking Lines prior to changing the Qty. to Rent on the Rental Line to the quantity that is to be shipped.

If the Serial Nos. have been selected on the Item Tracking Lines before changing the Qty. to Rent on the Rental Line, then a confirmation message will occur advising that the Item Tracking Lines will be deleted.

The Rental Line will be split into 2 lines, one with the quantity specified in the Qty. to Rent field and a new line with the quantity difference between what was on the initial line, Rental Quantity and the Qty to Rent entered.

On the Rental Line that contains the quantity that is to be shipped the Serial Nos. will need to be selected on the Item Tracking Lines.

On the new line created by the splitting of the Rental Unit Line for the partial shipment, the Qty. to Rent must be cleared prior to running Ship Rentals for the initial line.

Partial Returns

When processing a partial return, then the Item Tracking Lines, Qty. To Return must be set to zero on the Serial Nos. that are not being returned.

Then the Qty. to Return is to be set on the Rental Line equal to the sum of the quantity in the Qty. to Return field on the Item Tracking Lines.

If the Qty. to Return on the Rental Lines does not match the sum, then the return will not be allowed, and an error will occur.

To learn about the processing of partial shipments and returns for Rental Units linked to serialized Items from the To Ship and To Return cue lists, see ODT Rental Online Help, Processing Rentals, Pending Shipments and Returns.

3.17.3.2. Processing Partial Shipments of Units Linked to Serialized Items

The following example demonstrates the process for performing a partial shipment of Rental Units linked to serialized Items from a Rental Contract.

A total of 5 units will be rented out with a quantity of 1 being shipped 2 days before the Rental Start Date, and the remaining 4 will be shipped the day before the Rental Start Date.

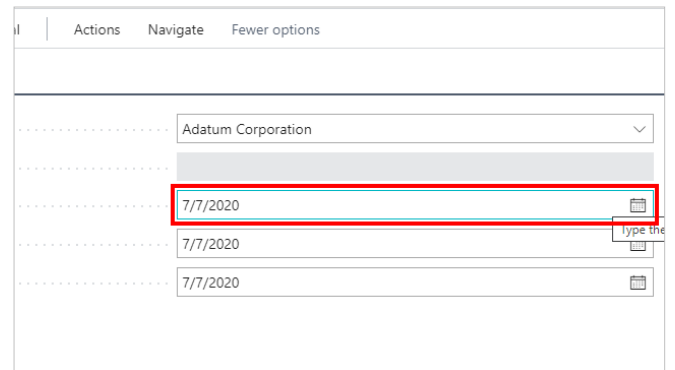
NOTE:

When processing a partial shipment of a Rental Unit linked to a serialized Item, the Serial Nos. should not be selected prior to changing the Qty. to Rent to the quantity that is to be shipped on the line. If the Serial Nos. have been selected before changing the Qty. to Rent on the Rental Line, the selected Serial Nos. will be deleted.

ODT Rentals Online Help

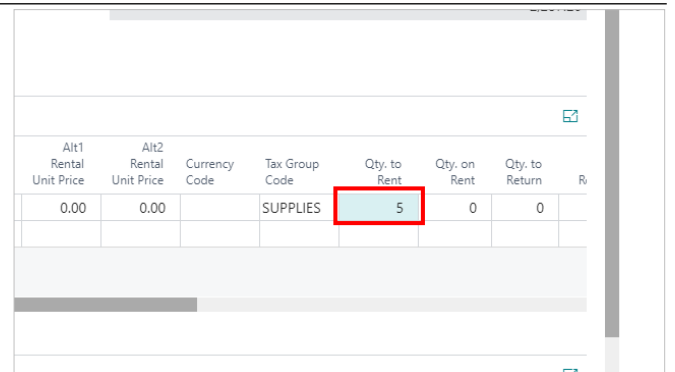
Click on the field **Posting Date**

In this example, the Posting Date is the date the partial shipment is to occur.



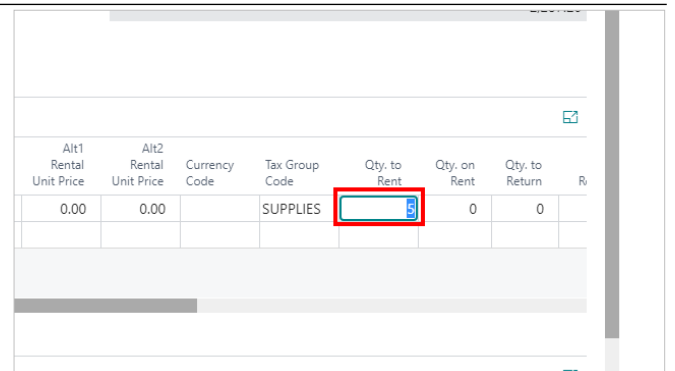
The screenshot shows a form with a dropdown menu for 'Adatum Corporation'. Below it, there are three input fields for dates, all containing '7/7/2020'. The first date field is highlighted with a red box. A tooltip 'Type the' is visible next to the second date field.

Click on the cell **Qty. to Rent** with the value **5**



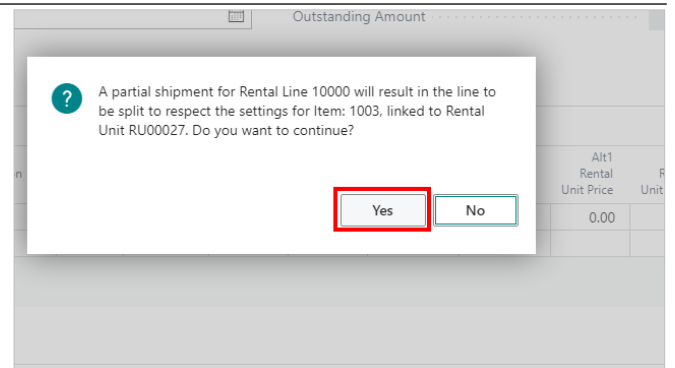
Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Ri
0.00	0.00		SUPPLIES	5	0	0	

Enter the text **1**. Press the **Enter** key.



Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Ri
0.00	0.00		SUPPLIES	1	0	0	

Click on the button **Yes**



The screenshot shows a confirmation dialog box with the following text: 'A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1003, linked to Rental Unit RU00027. Do you want to continue?'. There are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.



Click on **Rental Unit No. = RU00027, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**

Rental Lines						
Manage Line Functions Fewer options						
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code A	
→ RU00027	MONTH-PEND	1	EAST			
RU00027	MONTH-PEND	4	EAST			

Click on the navigation menu item popup **Line**

Posting Date	7/7/2020
Order Date	7/7/2020
Document Date	7/7/2020

Rental Lines						
Manage Line Functions Fewer options						
→ RU00027	MONTH-PEND	1	EAST			
RU00027	MONTH-PEND	4	EAST			

Click on the navigation menu item **Item Tracking Lines**

Contract Total	
Outstanding Amount	

Item Tracking Lines						
Entered Usage Entries	Periodic Usage Entries	Item Tracking Lines	Additional Notes			
7/9/2020	8/8/2020	453.00	0.00	0.00	View or edit serial numbers and lot num	
7/9/2020	8/8/2020	453.00	0.00	0.00	SUPPLIES	

Click on the cell **Serial No.**

Qty. to Handle	1	
Qty. to Invoice	1	
Item Tracking Code	RENTSNALL	Descr
Availability, Serial No.	Serial No.	Quantity
→ Yes		

Functions Fewer

Rental Quantity

1 EAST

4 EAST

Open assist edit



ODT Rentals Online Help

Click on the link in cell **Serial No.**

The screenshot shows a form with several fields. A red box highlights the 'Serial No.' field, which contains a dropdown menu with a blue arrow pointing to the right. The field is currently empty, and the dropdown menu is open, showing a list of serial numbers. The background shows a table with columns for 'Qty. to Handle', 'Qty. to Invoice', 'Item Tracking Code', 'Availability, Serial No.', and 'Quantity'.

Click on **Serial No. = SN00003**, Total Quantity = 1,
Total Requested Quantity = 0

The screenshot shows a table titled 'SERIAL NO. LIST'. The table has two columns: 'Lot No. ↑' and 'Serial No. ↑'. The first row is highlighted in blue and contains the value 'SN00003'. A red box highlights this row. The background shows a form with fields for 'Contract', 'Rental', 'Actions', 'Navigate', 'Customer Name', 'Date', and 'Rate'.

Click on the button **OK**

The screenshot shows a dialog box with a red box around the 'OK' button. The dialog box has a title bar and a 'Close' button. The background shows a table with columns for 'Qty. to Rent', 'Qty. to Return', and 'Qty. Returned'.

Click on the button **Close**

The screenshot shows a dialog box with a red box around the 'Close' button. The dialog box has a title bar and a 'Close' button. The background shows a table with columns for 'Qty. to Rent', 'Qty. to Return', and 'Qty. Returned'.



ODT Rentals Online Help

Click on the link in cell **ODT Transfer Order No.** with the value **1037**

Group	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disc...	%	Re	D.	Bi
PLIES	1	0	0	0	1037		0			
PLIES	4	0	0	0	1037		0			

Click on the field **Posting Date**

Note that the Posting Date is the same as the Posting Date on the contract.

EAST

RENTRESERV

RENT.LOG

7/7/2020

Type the date in the format M/d/yyyy

actions Line Fewer options

Line

Click on the navigation menu item popup **Line**

Transfer-to Code RENTRESERV

Direct Transfer

In-Transit Code RENT.LOG

Posting Date 7/7/2020

Lines Manage Functions Line Fewer options

New Line Delete Line

Item No.	Description	Quantity	Transfer-from Bin Code
→ 1003	Air Impact Wrench, 1 in.		

Click on the navigation menu item popup **Item Tracking Lines**

Direct Transfer

In-Transit Code RENT.LOG

Posting Date 7/7/2020

Lines Manage Functions Line Fewer options

Item Availability by Dimensions Item Tracking Lines

Item No.	Description	Quantity	Transfer-from Bin Code	Transfer-to Bin Code
→ 1003	Air Impact Wrench, 1 in.	1		



ODT Rentals Online Help

Click on the navigation menu item **Rental**

The screenshot shows the 'Item Tracking Lines' dropdown menu with the 'Rental' option highlighted. The background shows a table with columns for Item No., Description, and Quantity. The first row shows Item No. 1003, Description Air Impact Wrench, 1 in., and Quantity 1.

Click on the cell **Serial No.** with the value **SN00003**

Note that the Transfer Order, Item Tracking Lines for Rental contain the Serial No. selected on the contract.

The screenshot shows the 'Serial No.' field with the value 'SN00003' highlighted. The background shows a table with columns for Item No., Description, and Quantity. The first row shows Item No. 1003, Description Air Impact Wrench, 1 in., and Quantity 1.

Click on the button **Close**

The screenshot shows the 'Close' button highlighted. The background shows a table with columns for Item No., Description, and Quantity. The first row shows Item No. 1, Description Air Impact Wrench, 1 in., and Quantity 1.

Click on the button **Close**

The screenshot shows the 'Close' button highlighted. The background shows a table with columns for Item No., Description, and Quantity. The first row shows Item No. 1, Description Air Impact Wrench, 1 in., and Quantity 1.

IMPORTANT

The Qty. to Rent of 4 on the Rental Line, which is not to be shipped, must have the Qty. to Rent set to zero, prior to posting the shipment on the line that is to be shipped, otherwise those units and linked items will be shipped as well.



ODT Rentals Online Help

Click on the cell **Qty. to Rent** with the value **4**

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	OD Tra Or
0.00	0.00		SUPPLIES	1	0	0	0	10:
0.00	0.00		SUPPLIES	4	0	0	0	10:

Enter the text **0**.

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	OD Tra Or
0.00	0.00		SUPPLIES	1	0	0	0	10:
0.00	0.00		SUPPLIES	<input type="text" value="0"/>	0	0	0	10:

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00020 | WORK DATE: 7/7/2020

Rental Contract · RC00020

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00020 | WORK DATE: 7/7/2020

Rental Contract · RC00020

Process Contract Rental Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice Inv

Post the shipment of the rental units on the rental lines. A posted delivery document is created for the posted deliveries.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020



ODT Rentals Online Help

Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

Click on the button **OK**

Shipment Posted Successfully.

OK

The following demonstrates the shipping of the remaining quantity.

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

7/7/2020

7/7/2020

7/7/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount



ODT Rentals Online Help

Click on a date in the calendar

me Adatum Corporation

7/7/2020

July 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Manage Line Functions

Go to today Done

Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code
--------------------	-------------	-------------------	-----------------	---------------	----------

Click on **Rental Unit No. = RU00027, Rental Terms Code = MONTH-PEND, Rental Quantity = 4**

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
RU00027		Air Impact Wrench 1 inch Drive	MONTH-P
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-P

Sales Lines Manage Line Fewer options

Click on the navigation menu item popup **Line**

Posting Date 7/8/2020

Order Date 7/7/2020

Document Date 7/8/2020

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Term Code
RU00027		Air Impact Wrench 1 inch Drive	MONTH-P
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-P

Click on the navigation menu item **Item Tracking Lines**

Contract Total

Outstanding Amount

Entered Usage Entries Periodic Usage Entries Item Tracking Lines Additional Notes

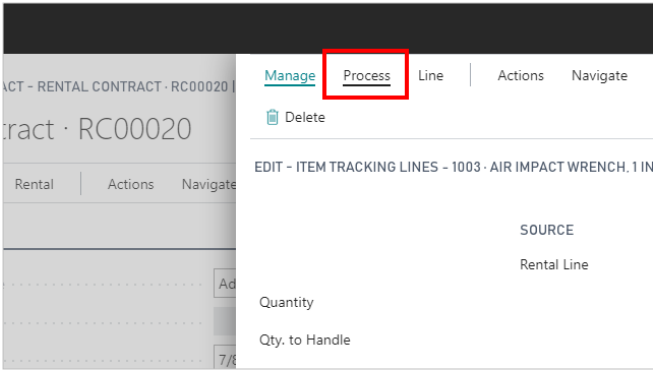
view or edit serial numbers and lot numbers

1	EAST			7/9/2020	8/8/2020	453.00
4	EAST			7/9/2020	8/8/2020	453.00

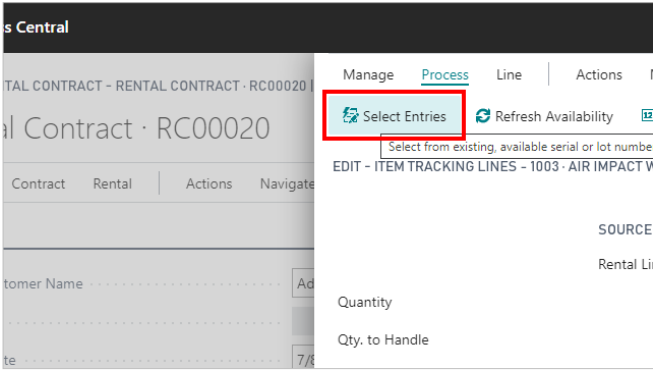


ODT Rentals Online Help

Click on the navigation menu item popup **Process**



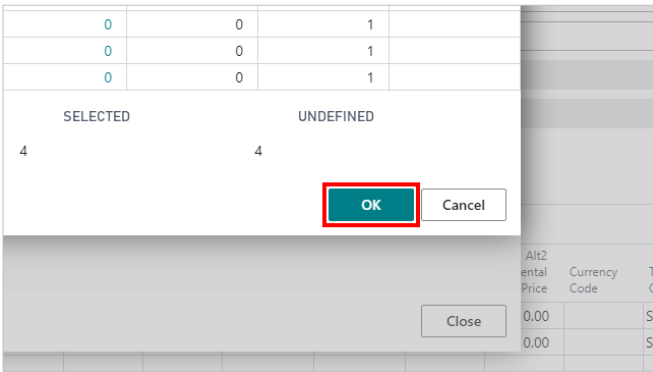
Click on the navigation menu item **Select Entries**



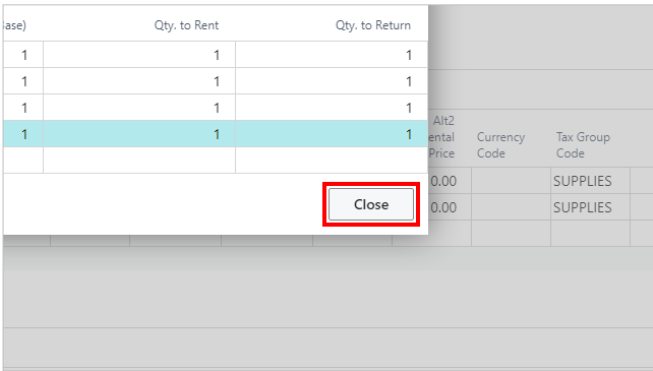
NOTE:

The Serial Nos. for the quantity of 4 can as well be manually selected in the Serial No. field on the Item Tracking Lines.

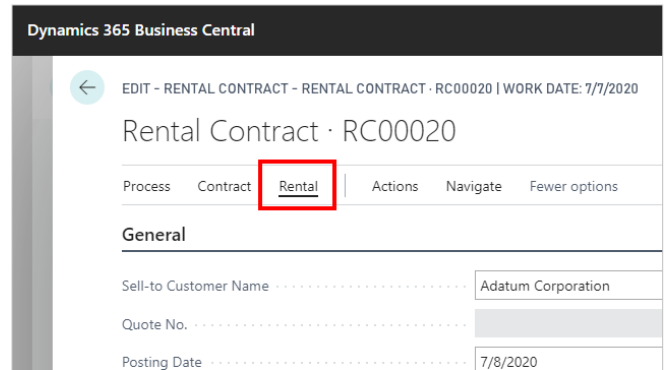
Click on the button **OK**



Click on the button **Close**



Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00020 | WORK DATE: 7/7/2020

Rental Contract · RC00020

Process Contract **Rental** Actions Navigate Fewer options

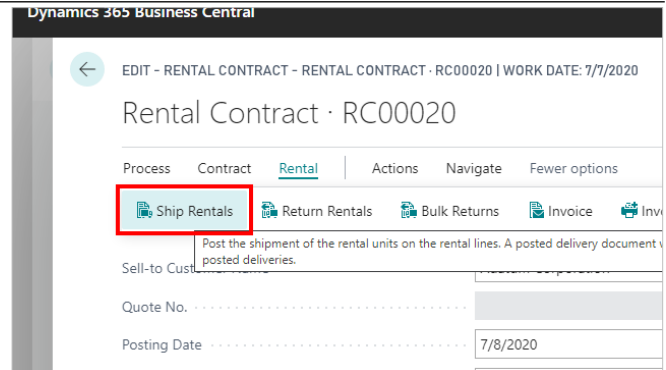
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/8/2020

Click on the navigation menu item **Ship Rentals**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00020 | WORK DATE: 7/7/2020

Rental Contract · RC00020

Process Contract Rental Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice Invo

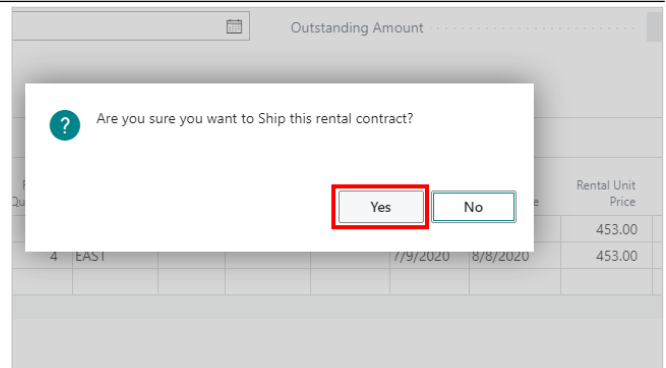
Post the shipment of the rental units on the rental lines. A posted delivery document v posted deliveries.

Sell-to Cust

Quote No.

Posting Date 7/8/2020

Click on the button **Yes**



Outstanding Amount

Are you sure you want to Ship this rental contract?

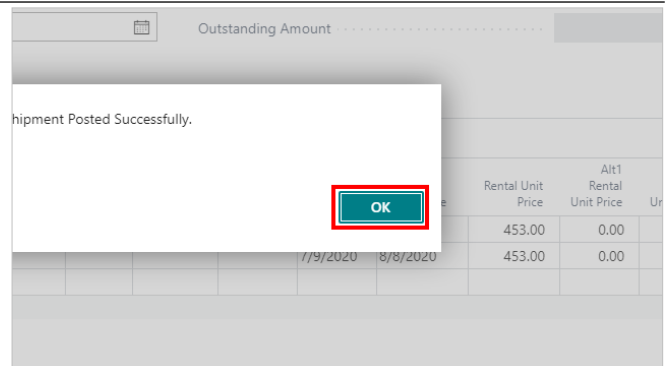
Yes No

Rental Unit Price

453.00

453.00

Click on the button **OK**



Shipment Posted Successfully.

OK

Rental Unit Price

Alt1 Rental Unit Price

453.00 0.00

453.00 0.00

3.17.3.3. Processing Partial Returns of Units Linked to Serialized Items

The Item Tracking Lines must have the Qty. to Return field set to 0 on the lines, for the Serial Nos. of the item or items not being returned.

IMPORTANT

This must be done before changing the Qty. to Return quantity on the To Return lines.

The following example demonstrates the process for performing a partial return from a Rental Contract.



Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

7/8/2020

7/7/2020 Type the date in the format M/d/yyyy

7/8/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Open the date picker

Click on the link **Next**

Adatum Corporation

7/8/2020

July 2020

Su Mo Tu We Th Fr Sa Next

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Functions

Click on a date in the calendar

Adatum Corporation

7/8/2020

August 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30 31

Go to today Done

Rental Start Date Rental Return Date Rental Unit Price



Click on **Rental Unit No. = RU00027, Rental Terms Code = MONTH-PEND, Rental Quantity = 4**

Rental Lines							Manage	Line	Functions	Fewer options	
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1						
→ RU00027	MONTH-PEND	1	EAST								
RU00027	MONTH-PEND	4	EAST								

Click on the navigation menu item popup **Line**

Posting Date	8/7/2020
Order Date	7/7/2020
Document Date	8/7/2020

Rental Lines							Manage	Line	Functions	Fewer options	
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1						
RU00027	MONTH-PEND	1	EAST								
→ RU00027	MONTH-PEND	4	EAST								

Click on the navigation menu item **Item Tracking Lines**

Contract Total	
Outstanding Amount	

Entered Usage Entries	Periodic Usage Entries	Item Tracking Lines	Additional Notes
-----------------------	------------------------	---------------------	------------------

7/9/2020	8/8/2020	453.00	0.00	0.00	SUPPLIES	0
7/9/2020	8/8/2020	453.00	0.00	0.00	SUPPLIES	0

Click on the cell **Qty. to Return** with the value **1**

0	4	-4.00
Description	Rental Tracking Code	
Quantity (Base)	Qty. to Rent	Qty. to Return
1	0	1
1	0	1
1	0	1
1	0	1



ODT Rentals Online Help

Enter the text **0**.

0		4		-4.00	
Description			Rental Tracking Code		
Quantity (Base)	Qty. to Rent	Qty. to Return			
1	0	1			
1	0	1			
1	0	1			
1	0	1			

Close

Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return			
1	0	1			
1	0	1			
1	0	1			
1	0	1			

Close

Click on the cell **Qty. to Return** with the value **0**

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	0	0	1037	0	✓
0.00		SUPPLIES	0	4	0	0	1038	0	✓

Enter the text **3**.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	0	0	1037	0	✓
0.00		SUPPLIES	0	4	0	0	1038	0	✓



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 7/8/2020

Rental Contract · RC00020

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/7/2020

Click on the button **Yes**

Outstanding Amount

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes No

	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...	Partial Return Date
	1	0	0	1037	0	<input checked="" type="checkbox"/>	
	4	3	0	1038	0	<input checked="" type="checkbox"/>	8/7/2020

Click on the cell **Partial Return Date** with the value **8/7/2020**

Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...	Partial Return Date
1	0	0	1037	0	<input checked="" type="checkbox"/>	
4	3	0	1038	0	<input checked="" type="checkbox"/>	8/7/2020

Type the date in the format M/d/yyyy

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 7/8/2020

Rental Contract · RC00020

Process Contract **Rental** Actions Navigate Fewer options

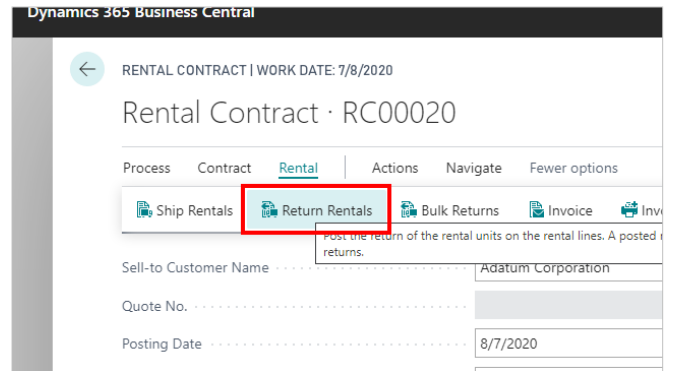
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/7/2020

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 7/8/2020

Rental Contract · RC00020

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Invo

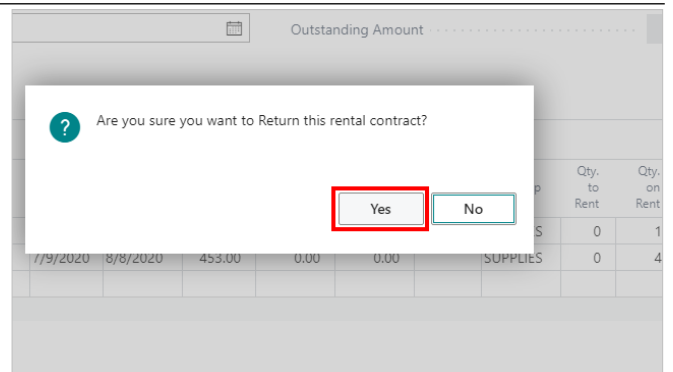
Post the return of the rental units on the rental lines. A posted return.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/7/2020

Click on the button **Yes**



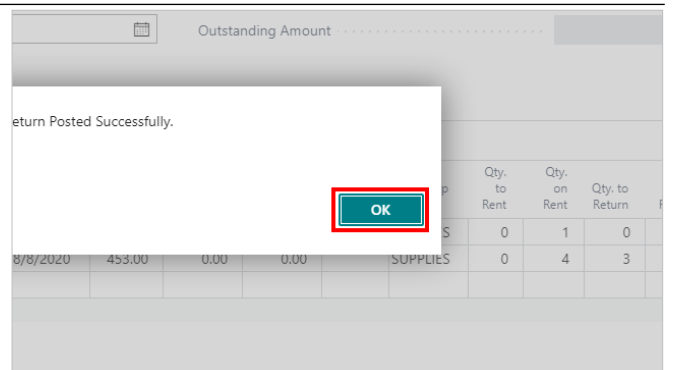
Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

	7/9/2020	8/8/2020	453.00	0.00	0.00		Qty. to Rent	Qty. on Rent
						SUPPLIES	0	1
							0	4

Click on the button **OK**



Outstanding Amount

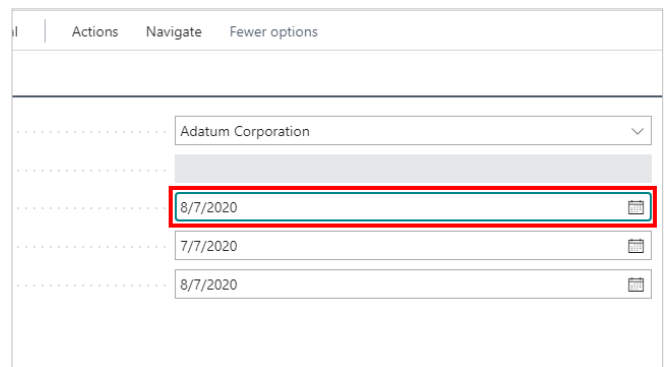
Return Posted Successfully.

OK

	8/8/2020	453.00	0.00	0.00		Qty. to Rent	Qty. on Rent	Qty. to Return
						0	1	0
						0	4	3

The following demonstrates the return of the remaining rental lines on the Rental Return Date.

Click on the field **Posting Date**



Actions Navigate Fewer options

Adatum Corporation

8/7/2020 7/7/2020 8/7/2020



ODT Rentals Online Help

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Adatum Corporation

8/7/2020

August 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Go to today Done

Rental Start Date Rental Return Date Rental Unit Price

Click on the cell **Qty. to Return** with the value **0**

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	0	0	1037	0	✓
0.00		SUPPLIES	0	0	0	3	—	0	✓
0.00		SUPPLIES	0	1	0	0	1038	0	✓

Enter the text **1**.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	1	0	1037	0	✓
0.00		SUPPLIES	0	0	0	3	—	0	✓
0.00		SUPPLIES	0	1	0	0	1038	0	✓



Click on **Rental Unit No. = RU00027, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN
RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN
RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN

Sales Lines

Manage

Line

Fewer options

Click on the navigation menu item popup **Line**

Posting Date

8/8/2020

Order Date

7/7/2020

Document Date

8/8/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN
RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN
→ RU00027	:	Air Impact Wrench 1 inch Drive	MONTH-PEN

Click on the navigation menu item **Item Tracking Lines**

Contract Total

Outstanding Amount

Registered Usage Entries

Periodic Usage Entries

Item Tracking Lines

Additional Notes

1	EAST			7/9/2020	8/8/2020	453.00	0.00
3	EAST			7/9/2020	8/7/2020	453.00	0.00
1	EAST			7/9/2020	8/8/2020	453.00	0.00

Click on the cell **Qty. to Return** with the value **0**

0

0

0

0

Description

Rental Tracking Code

Quantity (Base)

Qty. to Rent

Qty. to Return

1	0	0
---	---	---

Close



ODT Rentals Online Help

Enter the text 1.

0	0	
0	0	
Description	Rental Tracking Code	
Quantity (Base)	Qty. to Rent	Qty. to Return
1	0	1
Close		

Click on the button **Close**

ase)	Qty. to Rent	Qty. to Return
1	0	1
Close		

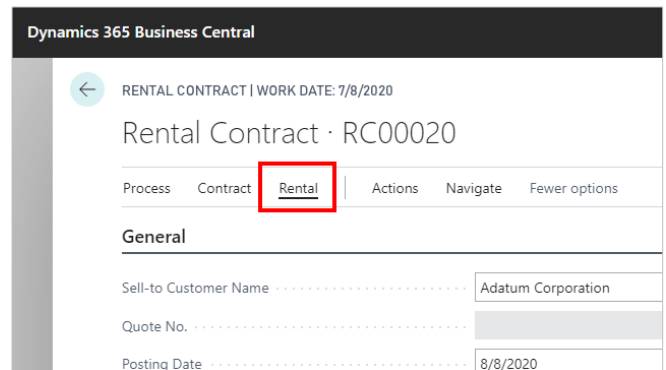
Click on the cell **Qty. to Return** with the value 0

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	1	0	1037	0	☑
0.00		SUPPLIES	0	0	0	3	—	0	☑
0.00		SUPPLIES	0	1	0	0	1038	0	☑

Enter the text 1.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	1	0	1037	0	☑
0.00		SUPPLIES	0	0	0	3	—	0	☑
0.00		SUPPLIES	0	1	0	0	1038	0	☑

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 7/8/2020

Rental Contract · RC00020

Process Contract **Rental** Actions Navigate Fewer options

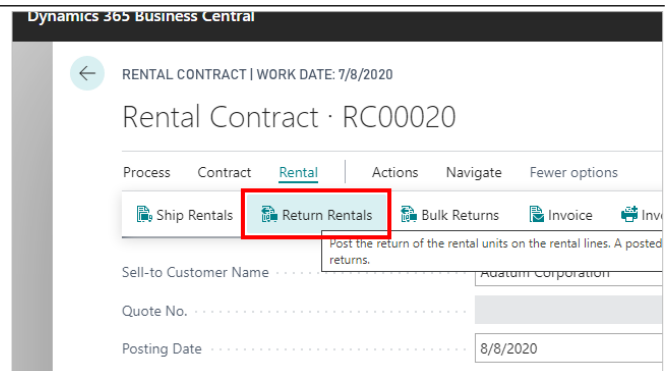
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/8/2020

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 7/8/2020

Rental Contract · RC00020

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

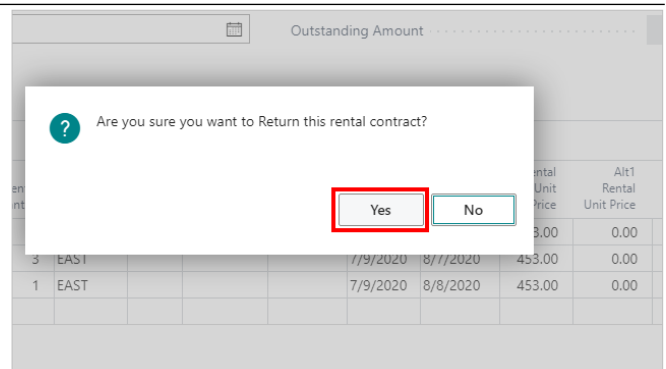
Post the return of the rental units on the rental lines. A posted return.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/8/2020

Click on the button **Yes**



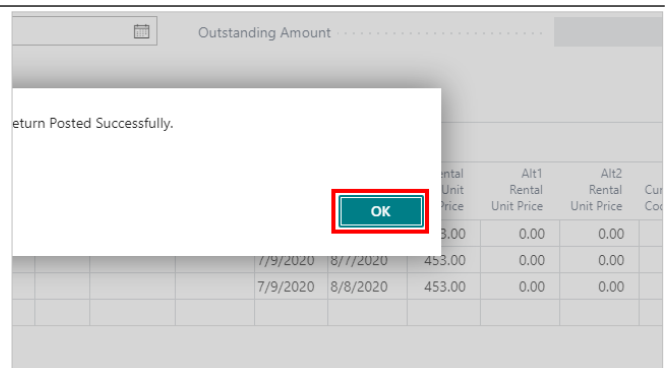
Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

							Rental Unit Price	Alt1 Rental Unit Price
3	EAST		7/9/2020	8/7/2020			453.00	0.00
1	EAST		7/9/2020	8/8/2020			453.00	0.00

Click on the button **OK**



Outstanding Amount

Return Posted Successfully.

OK

							Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cus
			7/9/2020	8/7/2020			453.00	0.00	0.00	
			7/9/2020	8/8/2020			453.00	0.00	0.00	

3.17.4. Processing Partial Shipments or Returns for Units Linked to Lot Items

3.17.4.1. Overview

When Rental Units are linked to Items that have Lot Tracking, then as with selling Items with Lot tracking, the Lot Nos. must be selected in the Item Tracking Entries.

For rentals, the selected Lot Nos. are to be equal to the Rental Quantity on the line.

For additional information on Rental Units linked to Items with Lot Tracking, see ODT Rental Online Help,



Processing Rentals, Rental Contract with Rental Units Linked to Items.

Partial Shipments

When processing a partial shipment of a Rental Unit linked to an Item with Lot tracking, the Lot Nos. should not be selected on the Item Tracking Lines prior to changing the Qty. to Rent on the Rental Line to the quantity that is to be shipped.

If the Lot Nos. have been selected on the Item Tracking Lines before changing the Qty. to Rent on the Rental Line, then a confirmation message will occur advising that the Item Tracking Lines will be deleted.

The Rental Line will be split into 2 lines, one with the quantity specified in the Qty. to Rent field and a new line with the quantity difference between what was on the initial line, Rental Quantity and the Qty to Rent entered.

On the Rental Line that contains the quantity that is to be shipped the Lot Nos. will need to be selected on the Item Tracking Lines.

On the new line created by the splitting of the Rental Unit Line for the partial shipment, the Qty. to Rent must be cleared prior to running Ship Rentals for the initial line.

Prior to running the Ship Rentals for the new line, the Lot No(s). must be selected.

Partial Returns

When processing a partial return, then the Item Tracking Lines, Qty. To Return must be set on the line(s) to equal the partial quantity that is to be returned.

Then the Qty. to Return is to be set on the Rental Line equal to the sum of the quantity in the Qty. to Return set on the Item Tracking Lines.

If the Qty. to Return on the Rental Lines does not match the sum, then the return will not be allowed, and an error will occur.

IMPORTANT

If after selecting the Item Tracking Entry(s), the Item Tracking Line(s) is deleted, the Item Tracking Lines must be closed and re-opened in order to update the Transfer Order, which updates the Item Inventory Availability, before running the Select Entries or lookup in the Lot No. field on the lines.

Should this not be done, then the Select Entries page will display incorrect data.

3.17.4.2. Processing Partial Shipment of Units Linked to Items with Lot Tracking

The following example demonstrates the process for performing a partial shipment of a Rental Unit linked to Item with Lot tracking from a Rental Contract.

On creation of the Rental Contract on April 20, a Rental Line was entered with a Rental Quantity of 5 with a daily rental term, a Rental Start of April 22, and a Rental Return Date of May 1.

Subsequently a quantity of 1 will be shipped on April 21, and the remaining 4 will be shipped on April 22, the Rental Start Date.

The Item Tracking Lines will be populated in order to demonstrate the confirmation message that will occur when the Qty. to Rent is set to a quantity less than selected in the Item Tracking Lines.



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date 4/20/2021 Contract Total

Order Date 4/20/2021 Outstanding Am

Document Date 4/20/2021 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
→ RU00032	5	EAST			4/22/2021

Click on the navigation menu item **Item Tracking Lines**

Date 4/20/2021 Outstanding Amount
ent Date 4/20/2021 Advanced Proforma
l Document No.

Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Amount Lines View Rental Calendar **Item Tracking Lines** Attachments

Rental Ledger Entries Metered Usage Entries Additional Notes Rental Prices

Rental Value Entries Periodic Usage Entries Dimensions

Click on the navigation menu item popup **Process**

RC00001 10000
RC00002 20000
RC00004 : 10000

Quantity
Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOT

Manage | **Process** | Line | Open in Excel | Acti

Availa...
Serial No. Serial No. Availability, Lot No. Lot No.

→ Yes Yes Yes

Click on the navigation menu item **Select Entries**

RC00002 20000
RC00004 : 10000

Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOT

Manage | **Process** | Line | Open in Excel

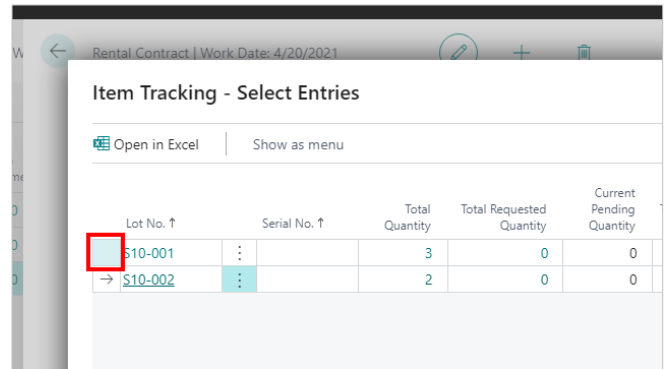
Select Entries Refresh Availability

No. Serial No. Lot No.

→ Yes Yes Yes

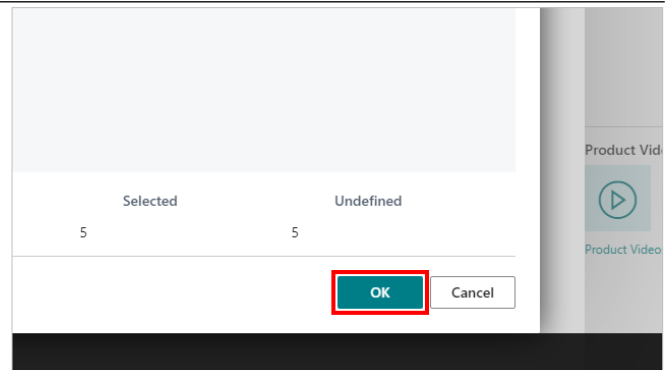
Click on **Lot No. = S10-001**

Note that 2 Lot Nos. will be needed to fulfill the required Rental Quantity of 5 on the Rental Line.



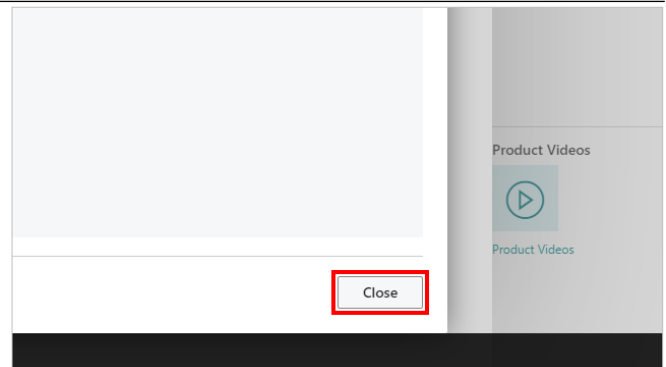
Lot No. ↑	Serial No. ↑	Total Quantity	Total Requested Quantity	Current Pending Quantity
S10-001	:	3	0	0
S10-002	:	2	0	0

Click on the button **OK**



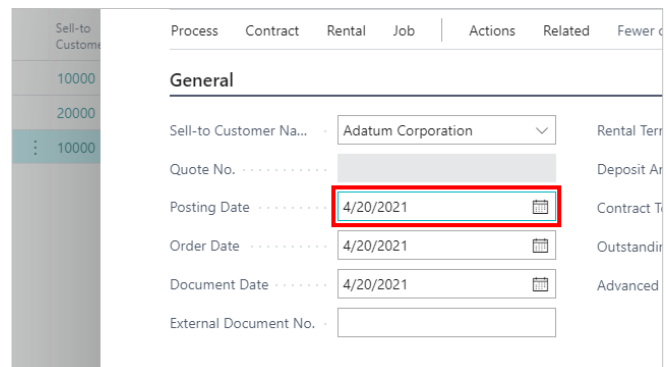
Selected	Undefined
5	5

Click on the button **Close**



The following will show the confirmation message that will occur when the Item Tracking Lines are selected for the Rental Quantity and then the Qty. to Rent is set to 1 to do a partial shipment.

Click on the field **Posting Date**



Field	Value
Sell-to Customer Na...	Adatum Corporation
Quote No.	
Posting Date	4/20/2021
Order Date	4/20/2021
Document Date	4/20/2021
External Document No.	



Click on the link **Open the date picker for Posting Date**

ess Contract Rental Job Actions Related Fewer options

eral

to Customer Na... Adatum Corporation Rental Terms Code

e No. Deposit Amount

ng Date 4/20/2021 Contract Total

r Date 4/20/2021 Outstanding Amount

ment Date 4/20/2021 Advanced Proforma ☐

nal Document No.

Click on a date in the calendar

As the partial shipment is to occur on April 21 the Posting Date must be set to April 21.

Quote No. Deposit Amount

Posting Date 4/20/2021 Contract Total

Order Date April 2021 Outstanding Amount

Document Date Advanced Proforma

External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price	Alt1 R Unit
→ RU00032	:	4/22/2021		5/1/2021	1,100.00	

Click on the cell **Qty. to Rent** with the value 5

External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Lin Disc...
→ RU00032	:	SUPPLIES	5	0	0	0

Sales Lines | Manage | Line | Fewer options

Enter the text 1.

External Document No.

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Lin Disc...
→ RU00032	:	SUPPLIES	1	0	0	0

Sales Lines | Manage | Line | Fewer options



Click on the button **Yes**

4/21/2021 Advanced Proforma

This action will delete the item tracking lines, do you wish to continue?

Yes No

Click on the button **Yes**

4/21/2021 Advanced Proforma

A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1006, linked to Rental Unit RU00032. Do you want to continue?

Yes No

Click on the cell **Rental Start Date** with the value **4/22/2021**

No.

Manage	Line	Functions	Related	Fewer options			
Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
1	EAST			4/22/2021		5/1/2021	1,100.00
4	EAST			4/22/21	Type the date in the format M/d/yyyy		100.00
Manage	Line	Fewer options					

Click on the link in cell **Rental Start Date** with the value **4/22/2021**

No.							
Manage	Line	Functions	Related	Fewer options			
Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
1	EAST			4/22/20		5/1/2021	1,100.00
4	EAST			4/22/2021		5/1/2021	1,100.00
Manage	Line	Fewer options					



ODT Rentals Online Help

Click on a date in the calendar

Select the date the rental is to commence when shipped earlier than the date that initially entered on the line and billing is to commence on the date the unit is shipped.

Location Code	Terms Code Alt1	Terms Code Alt2	Rental Start Date	No. of Periods	Return Date	Rental Unit Price	Alt1 Unit
AST			4/22/2021		5/1/2021	1,100.00	
AST						1,100.00	

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Go to today Done

Unit of Measure Code

Click on the navigation menu item popup **Line**

Posting Date	4/21/2021	Contract Total
Order Date	4/20/2021	Outstanding Am
Document Date	4/21/2021	Advanced Profo
External Document No.		

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
→ RU00032	1	EAST			4/21/2021
RU00032	4	EAST			4/22/2021

Click on the link **Item Tracking Lines**

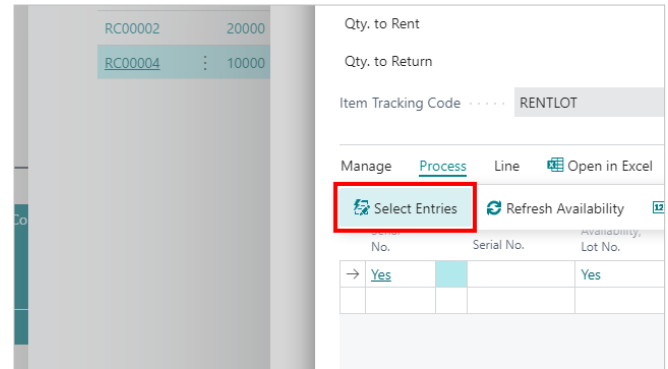
Date	4/20/2021	Outstanding Amount
ent Date	4/21/2021	Advanced Proforma
l Document No.		

Lines	Manage	Line	Functions	Related	Fewer options
Rental Amount Lines	View Rental Calendar	Item Tracking Lines	Attachments		
Rental Ledger Entries	Metered Usage Entries	Additional Notes	Rental Prices		
Rental Value Entries	Periodic Usage Entries	Dimensions			

Click on the navigation menu item popup **Process**

RC00001	10000	Quantity		
RC00002	20000	Qty. to Rent		
RC00004	10000	Qty. to Return		
		Item Tracking Code		
		RENTLOT		
Manage	Process	Line	Open in Excel	Acti
Availa...	Serial No.	Serial No.	Availability, Lot No.	Lot No.
→ Yes			Yes	

Click on the navigation menu item **Select Entries**



RC00002 20000
RC00004 : 10000

Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOT

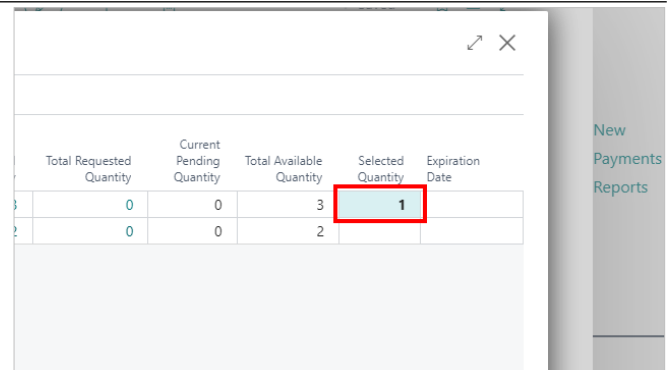
Manage Process Line Open in Excel

Select Entries Refresh Availability

No. Serial No. Lot No.

→ Yes Yes Yes

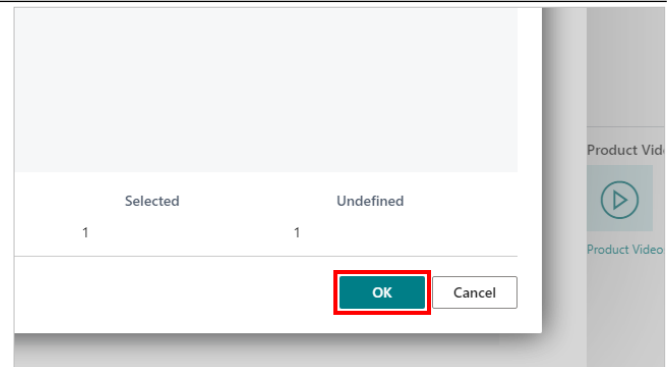
Click on the cell **Selected Quantity** with the value 1



Total Requested Quantity	Current Pending Quantity	Total Available Quantity	Selected Quantity	Expiration Date
0	0	3	1	
0	0	2		

New Payments Reports

Click on the button **OK**



Selected Undefined

1 1

OK Cancel

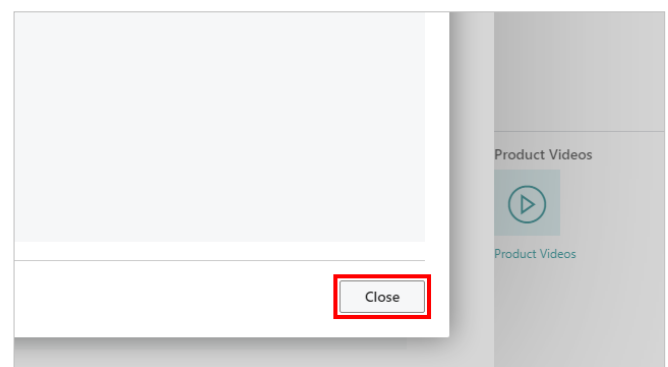
Product Videos

IMPORTANT

If after selecting the Item Tracking Entry(s), the Item Tracking Line(s) is deleted, the Item Tracking Lines must be closed and re-opened in order to update the Transfer Order, which updates the Item Inventory Availability, before running the Select Entries or lookup in the Lot No. field on the lines.

Should this not be done, then the Select Entries page will display incorrect data.

Click on the button **Close**



Close

Product Videos

ODT Rentals Online Help

Click on the cell **Qty. to Rent** with the value **4**

Functions Related Fewer options							
Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Retu
0.00	0.00		SUPPLIES	1	0	0	
0.00	0.00		SUPPLIES	4	0	0	
Fewer options							

Enter the text **0**.

Functions Related Fewer options							
Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Retu
0.00	0.00		SUPPLIES	1	0	0	
0.00	0.00		SUPPLIES	0	0	0	
Fewer options							

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/20/2021

Rental Contract · RC00004

Process Contract **Rental** Job Actions Related Fev

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Ship Rentals**

Rental Contracts - Open | W Rental Contract | Work Date: 4/20/2021

Rental Contract · RC

Process Contract Rental Job Acti

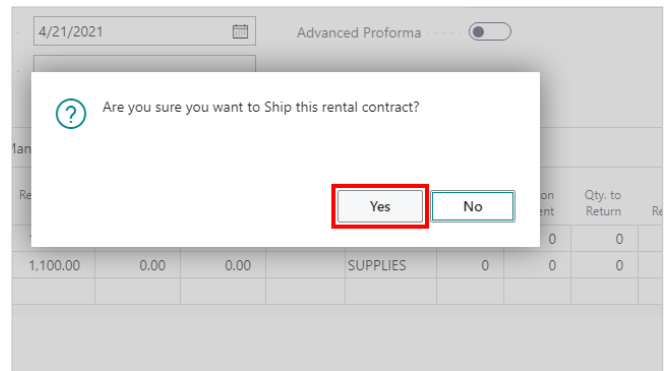
Ship Rentals Return and Send...

Ship and Send... Bulk Returns

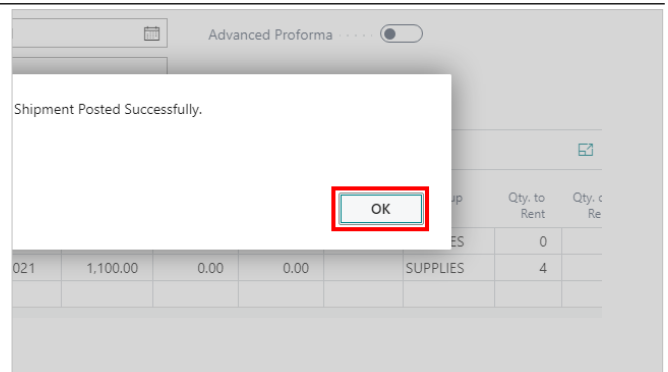
Return Rentals Invoice

Posting Date 4/21/2021

Click on the button **Yes**

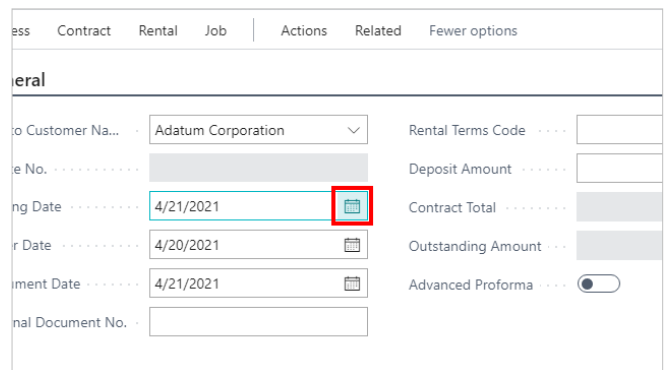


Click on the button **OK**



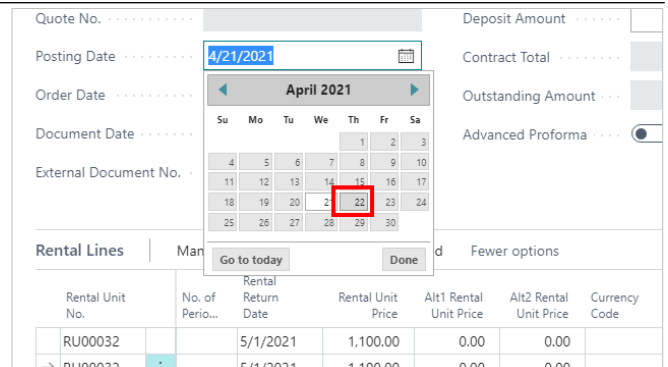
The following demonstrates the steps for processing the shipment for the Rental Line created when the partial shipment was done.

Click on the link **Open the date picker for Posting Date**



Click on a date in the calendar

As the shipment of the remaining quantity on the second Rental Line is to occur on April 22, the Posting Date is set to the date of the shipment.



As the Item Tracking Lines are deleted when a partial shipment is processed, the Item Tracking Lines for the Lot Nos. must be selected prior the shipping the second Rental Line.



Click on the navigation menu item popup **Line**

Posting Date 4/22/2021 Contract Total

Order Date 4/20/2021 Outstanding Am

Document Date 4/21/2021 Advanced Profor

External Document No.

Rental Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Unit No.	No. of Perio...	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
RU00032		5/1/2021	1,100.00	0.00	0.00
→ RU00032	:	5/1/2021	1,100.00	0.00	0.00

Click on the navigation menu item **Item Tracking Lines**

Date 4/20/2021 Outstanding Amount
ent Date 4/22/2021 Advanced Proforma
l Document No.

Lines | Manage | **Line** | Functions | Related | Fewer options

Rental Amount Lines View Rental Calendar **Item Tracking Lines** Attachments

Rental Ledger Entries Metered Usage Entries Additional Notes Rental Prices

Rental Value Entries Periodic Usage Entries Dimensions

Click on the navigation menu item popup **Process**

RC00001 10000
RC00002 20000
RC00004 : 10000

Quantity
Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOT

Manage | **Process** | Line | Open in Excel | Acti

Availa...
Serial No. Serial No. Availability, Lot No. Lot No.

→ Yes Yes

Click on the navigation menu item **Select Entries**

RC00002 20000
RC00004 : 10000

Qty. to Rent
Qty. to Return
Item Tracking Code RENTLOT

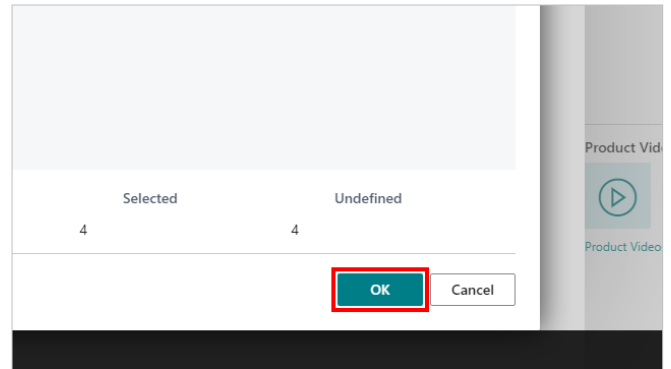
Manage | **Process** | Line | Open in Excel

Select Entries Refresh Availability

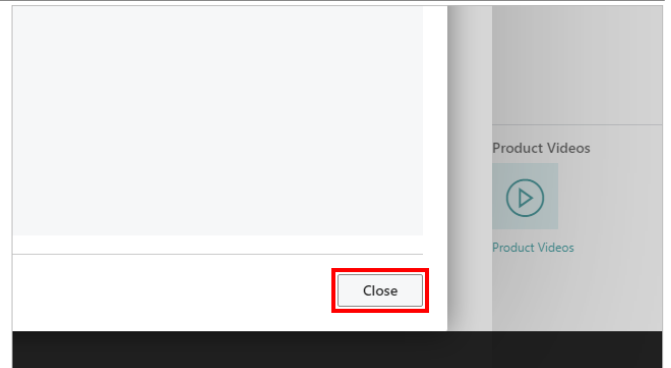
No. Serial No. Lot No.

→ Yes Yes

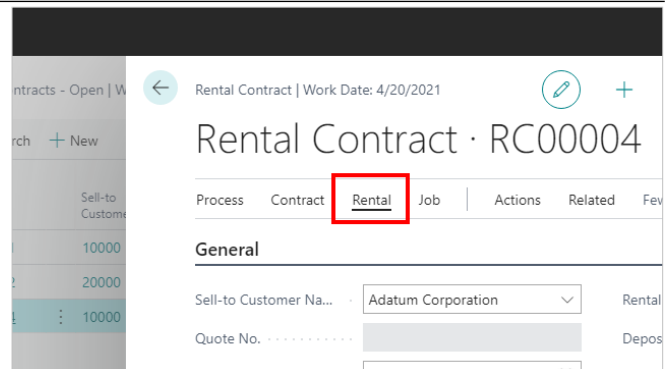
Click on the button **OK**



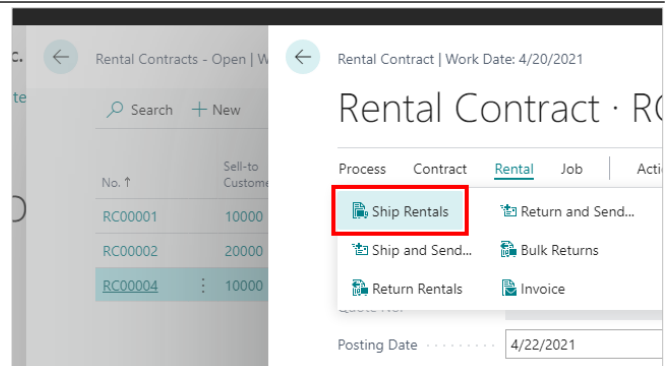
Click on the button **Close**



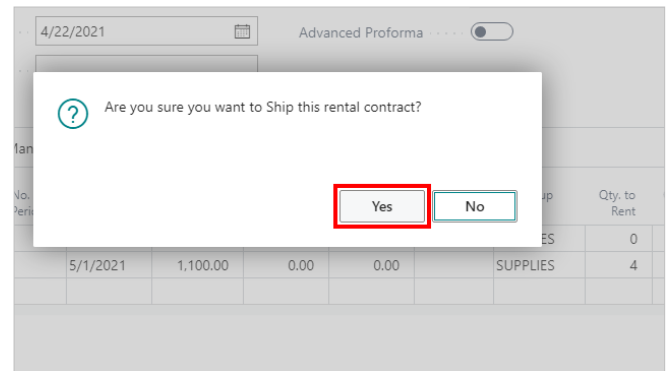
Click on the navigation menu item popup **Rental**



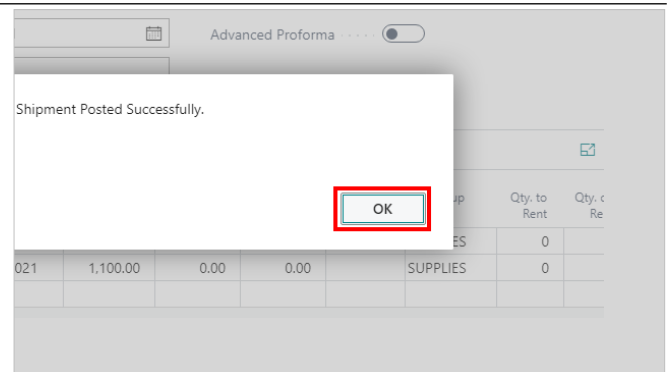
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



3.17.4.3. Processing Partial Returns of Units Linked to Items with Lot Tracking

IMPORTANT

When processing partial returns the Item Tracking Line(s), Qty. to Return must be modified to reflect the quantity of the partial return before the Qty. to Return is entered on the Rental Line.

Thus if there are multiple lines with different Lot Nos. the total the quantities in the Qty. to Return field for all the tracking lines are to be equal the quantity being returned.

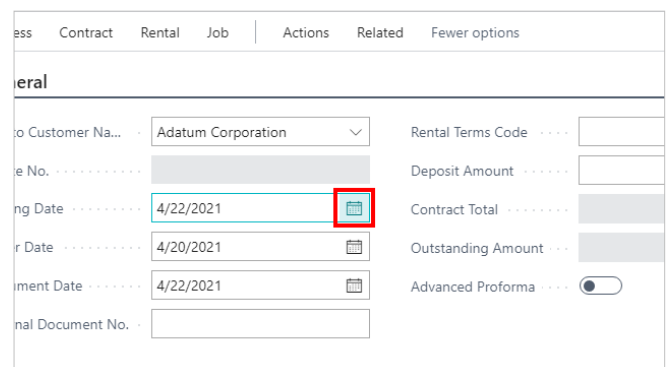
If the Qty. to Return is modified before the Item Tracking Lines, then a partial return message will occur, "Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line." When Yes is selected, then an error will occur and the partial return cannot be processed.

The following example demonstrates the process for performing a partial return of a Rental Unit linked to Item with Lot tracking from a Rental Contract.

For this example the same contract created for the partial shipment will be used. On both Rental Lines the Rental Return Date is May 1.

On April 30, a quantity of 1 will be returned on the second rental line which has a quantity of 4 out on rent.

Click on the link **Open the date picker for Posting Date**





ODT Rentals Online Help

Click on a date in the calendar

Select the date the partial return is occurring on.

Posting Date 4/22/2021

Order Date April 2021

Document Date Su Mo Tu We Th Fr Sa

External Document No.

Rental Lines

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
RU00032	0.00	0.00		SUPPLIES	0	1	
→ RU00032	0.00	0.00		SUPPLIES	0	4	

Click on the navigation menu item popup **Line**

Posting Date 4/30/2021

Order Date 4/20/2021

Document Date 4/22/2021

External Document No.

Rental Lines

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent
RU00032	0.00	0.00		SUPPLIES	
→ RU00032	0.00	0.00		SUPPLIES	

Click on the navigation menu item **Item Tracking Lines**

Date 4/20/2021

Outstanding Amount ...

ent Date 4/30/2021

Advanced Proforma ...

Document No.

Rental Lines

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent
RU00032	0.00	0.00		SUPPLIES	
→ RU00032	0.00	0.00		SUPPLIES	

As the tracking lines have 2 records with different Lot Nos., select the line with the Lot No. that the partial return is applicable to.

Click on the cell **Qty. to Return** with the value 2

Description Rental Lot Tracking

Related Fewer options

Expiration Date	Quantity (Base)	Qty. to Rent	Qty. to Return
	2	0	2
	2	0	2



ODT Rentals Online Help

Enter the text **1**.

Description

Rental Lot Tracking

s

Related

Fewer options

Expiration Date	Quantity (Base)	Qty. to Rent	Qty. to Return
	2	0	<input type="text" value="1"/>
	2	0	2

Click on the cell **Qty. to Return** with the value **2**

Description

Rental Lot Tracking

s

Related

Fewer options

Expiration Date	Quantity (Base)	Qty. to Rent	Qty. to Return
	2	0	<input type="text" value="1"/>
	2	0	<input type="text" value="2"/>

Enter the text **0**.

Description

Rental Lot Tracking

s

Related

Fewer options

Expiration Date	Quantity (Base)	Qty. to Rent	Qty. to Return
	2	0	1
	2	0	<input type="text" value="0"/>

Click on the button **Close**

Close

Product Videos

Product Videos



Click on the cell **Qty. to Return** with the value **0**

Line	Functions	Related	Fewer options						
	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa...	O
0		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	10
0		SUPPLIES	0	4	0	0	0	<input checked="" type="checkbox"/>	10

Enter **Qty. to Return**. Press the **Enter** key.

Line	Functions	Related	Fewer options						
	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa...	O
0		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	10
0		SUPPLIES	0	4		0	0	<input checked="" type="checkbox"/>	10

Click on the button **Yes**

4/30/2021 Advanced Proforma

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes No

0.00		SUPPLIES	0	4	0	0	0	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>
------	--	----------	---	---	---	---	---	-------------------------------------	---	-------------------------------------

Click on the navigation menu item popup **Rental**

Contracts - Open | Work Date: 4/30/2021

Rental Contract · RC00004

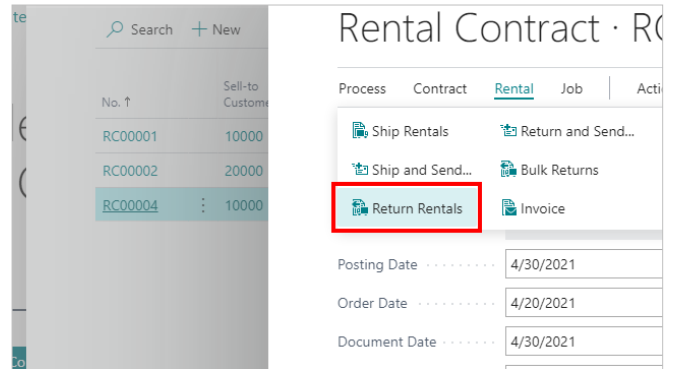
Process Contract **Rental** Job Actions Related Few

General

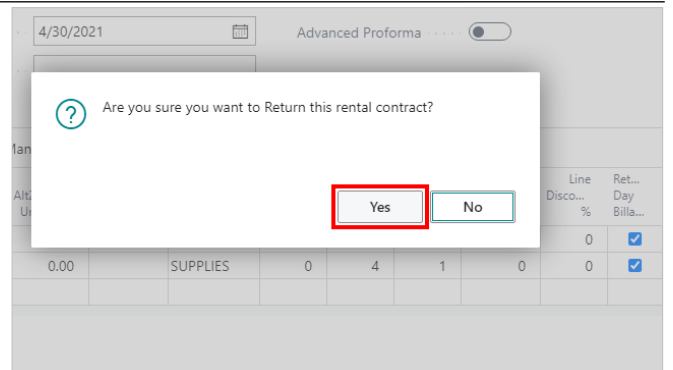
Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

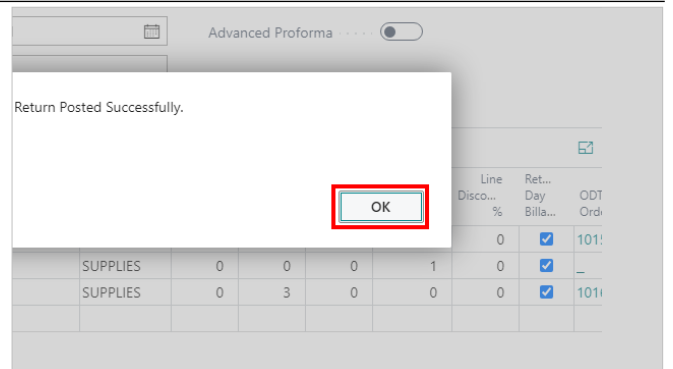
Click on the navigation menu item **Return Rentals**



Click on the button **Yes**

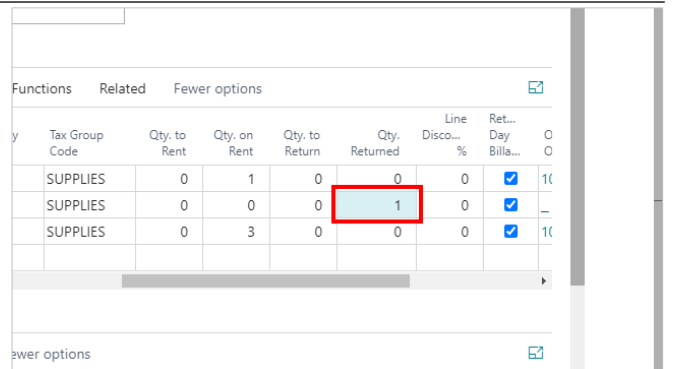


Click on the button **OK**



Click on the cell **Qty. Returned** with the value **1**

When a partial return is posted the Rental Line is split, with the quantity returned recorded on the initial line.





ODT Rentals Online Help

Click on the cell **Qty. on Rent** with the value **3**

A new line is created for the Rental Unit which contains the remaining quantity not returned during the partial return.

Manage Line Functions Related Fewer options								
Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...
0.00		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	0	0	1	0	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	3	0	0	0	<input checked="" type="checkbox"/>
				3				

Manage Line Fewer options		

The Item Tracking Lines linked to the newly generated line contain the Lot records with the remaining quantity still on rent.

The following is a review of the tracking lines.

Click on the navigation menu item popup **Line**

Posting Date	4/30/2021	Contract Total
Order Date	4/20/2021	Outstanding Am
Document Date	4/30/2021	Advanced Profo
External Document No.		

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Alt2 Rental Unit Price	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent
RU00032	0.00		SUPPLIES	0	1
RU00032	0.00		SUPPLIES	0	0
→ RU00032	0.00		SUPPLIES	0	3

Click on the navigation menu item **Item Tracking Lines**

Date	4/20/2021	Outstanding Amount
ent Date	4/30/2021	Advanced Proforma
l Document No.		

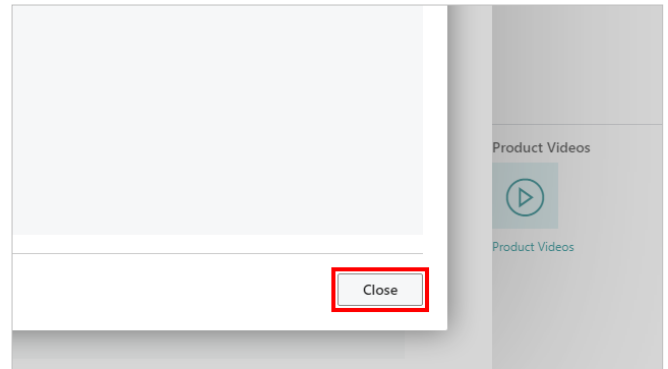
Lines	Manage	Line	Functions	Related	Fewer options
Rental Amount Lines		View Rental Calendar		Item Tracking Lines	
Rental Ledger Entries		Metered Usage Entries		Additional Notes	
Rental Value Entries		Periodic Usage Entries		Dimensions	

RU0032	0.00		SUPPLIES	0	3	0	0
--------	------	--	----------	---	---	---	---

Click on the cell **Quantity (Base)** with the value **1**

FLOT		Description				Rental Lot Tracking	
Open in Excel		Actions		Related		Fewer options	
Availability, Lot No.	Lot No.	Expiration Date	Quantity (Base)	Qty. to Rent	Qty. to Return		
Yes	S10-001		1	0	1		
Yes	S10-002		2	0	2		

Click on the button **Close**



The contract can be invoiced and the remaining quantity on rent returned.

3.17.5. Processing Partial Shipments or Returns for Units Linked to Bin Items

3.17.5.1. Overview

When Rental Units are linked to Items that are stored in Bins are entered on the Rental Line, then the Bin Code on the Rental Line is automatically populated with the Default Bin Code specified in the Item Bin Contents. The Bin Code can be changed on the Rental Line to specify that the items are to be shipped from a different Bin.

When processing partial shipments of Rental Units linked to Items stored in Bins, the Bin Code on the partial shipment can be set to a different Bin. Additionally, when shipping the remaining quantity the Bin Code can be changed.

For additional information on Rental Units linked to Items stored in Bins, see ODT Rental Online Help, Processing Rentals, Rental Contract with Rental Units Linked to Items.

To learn about the processing of partial shipments and returns for Rental Units linked to Items stored in Bins, from the To Ship and To Return cue lists, see ODT Rental Online Help, Processing Rentals, Pending Shipments and Returns.

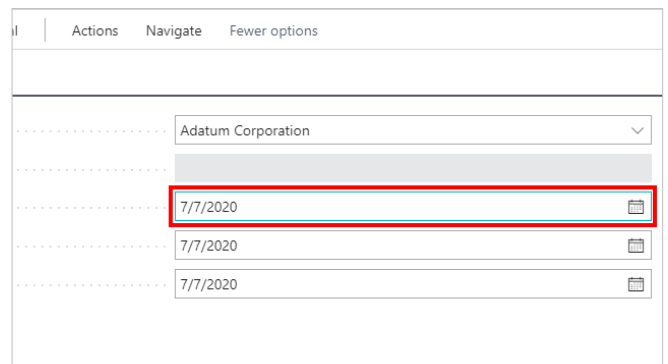
3.17.5.2. Processing Partial Shipments of Units Linked to Items in Bins

The following example demonstrates the process for performing a partial shipment of Rental Units linked to Items stored in Bins from a Rental Contract.

In the example, the rental line has a Rental Quantity of 5, and 2 will be shipped out 2 days before the Rental Start Date.

The remaining 3 will be shipped out the following day.

Click on the field **Posting Date**





ODT Rentals Online Help

Click on the cell **Bin Code** with the value **C-001**

The Default Bin for the selected Location defaults to the Bin Code on the Rental Line and can be changed to a different Bin, if required.

options									
	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	
Bits 3/16...	MONTH-PEND	5	CENTRAL	C-001			7/9/2020	8/8/2020	
Look up value									

Click on the cell **Qty. to Rent** with the value **5**

	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre...	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned
0	0.00	0.00		SUPPLIES	5	0	0	

Enter the text **2**. Press the **TAB** key.

	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre...	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned
0	0.00	0.00		SUPPLIES	2	0	0	

Click on the button **Yes**

Outstanding Amount

? A partial shipment for Rental Line 10000 will result in the line to be split to respect the settings for Item: 1001, linked to Rental Unit RU00026. Do you want to continue?

Yes No

IMPORTANT

The Qty. to Rent of 3 on the Rental Line, which is not be shipped, must have the Qty. to Rent set to zero, prior to posting the shipment on the line that is to be shipped, otherwise those units and linked items will be shipped as well.

ODT Rentals Online Help

Click on the cell **Qty. to Rent** with the value **3**

	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre...	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty Returned
D	0.00	0.00		SUPPLIES	2	0	0	
D	0.00	0.00		SUPPLIES	3	0	0	
					3			

Enter the text **0**.

	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre...	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty Returned
D	0.00	0.00		SUPPLIES	2	0	0	
D	0.00	0.00		SUPPLIES	3	0	0	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00022

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00022

Process Contract Rental Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice Inv

Post the shipment of the rental units on the rental lines. A posted delivery document will be created for the posted deliveries.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020



Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

Click on the button **OK**

Shipment Posted Successfully.

OK

The following demonstrates the shipping of the remaining quantity.
For this example, the Bin Code on the line will be changed to a different bin.

Click on **Rental Unit No. = RU00026, Rental Terms Code = MONTH-PEND, Rental Quantity = 3**

Rental Unit No.	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
→ RU00026	C-001			7/9/2020	8/8/2020
RU00026	C-001			7/9/2020	8/8/2020


Click on the cell **Bin Code** with the value **C-001**

Rental Unit No.	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
RU00026	C-001			7/9/2020	8/8/2020
→ RU00026	C-001			7/9/2020	8/8/2020

Look up value

ODT Rentals Online Help

Click on the lookup button in the cell **Bin Code**

Rental Lines		Manage	Line	Functions	Fewer options	
Rental Unit No.	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	
RU00026	C-001			7/9/2020	8/8/2020	
→ RU00026				7/9/2020	8/8/2020	

Click on the cell **Code** with the value **C-002**

BIN LIST	
Code ↑	Description
→ C-001	Central Bin C-0
C-002	Central Bin C-0

The following demonstrates the review and verification of the Transfer-from Bin Code on the Transfer Order prior to shipping the Rental Unit.

Click on the link in cell **ODT Transfer Order No.** with the value **1043**

ax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Bill...	Partial Return Date	Depart Code
UPPLIES	0	2	0	0	1042	0	<input checked="" type="checkbox"/>		
UPPLIES	3	0	0	0	1043	0	<input checked="" type="checkbox"/>		

Click on the cell **Transfer-from Bin Code** with the value **C-002**

Note that the Transfer-from Bin Code is automatically updated when the Bin Code is changed on the Rental Line.

Delete Line		Transfer-from Bin Code	Transfer-To Bin Code	Reserved Quantity Inbnd.	R
Description	Quantity				
Wacker Hammer Drill Bits 1/2 inch	3	C-002			



ODT Rentals Online Help

Click on the button **Close**

A screenshot of a web form. It contains several input fields, a dropdown menu with the value 'Partial', and a date field with the value '7/7/2020'. At the bottom right of the form, there is a button labeled 'Close' which is highlighted with a red rectangular box. Below the 'Close' button, there is a link that says 'Show more'.

Click on the field **Posting Date**

A screenshot of a web form. It contains a dropdown menu with the value 'Adatum Corporation'. Below it, there is a date field with the value '7/7/2020' which is highlighted with a red rectangular box. Below this date field, there are two more date fields, both with the value '7/7/2020'.

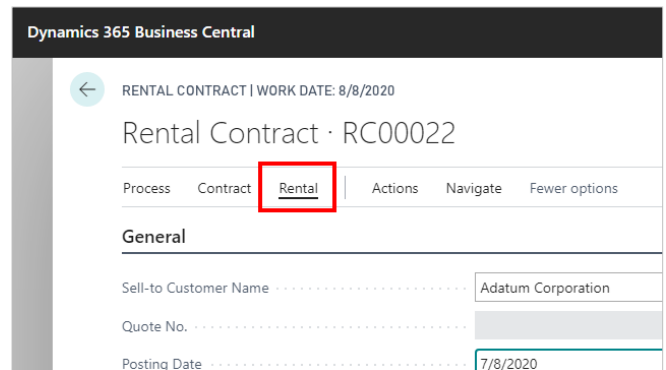
Click on the link **Open the date picker**

A screenshot of a web form. It contains several input fields and a dropdown menu. Below the dropdown menu, there is a link labeled 'Open the date picker' which is highlighted with a red rectangular box. To the right of the link, there are several labels: 'External Document No.', 'Rental Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount'.

Click on a date in the calendar

A screenshot of a web form. It contains a dropdown menu with the value 'Adatum Corporation'. Below it, there is a date field with the value '7/7/2020'. A calendar is open, showing the month of July 2020. The date '7/8/2020' is highlighted with a red rectangular box. Below the calendar, there is a table with columns: 'Bin Code', 'Rental Terms Code Alt1', 'Rental Terms Code Alt2', 'Start Date', 'Return Date', 'Unit Price', 'Alt1 Rental Unit Price', 'Alt2 Rental Unit Price', and 'Currency Code'.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00022

Process Contract **Rental** Actions Navigate Fewer options

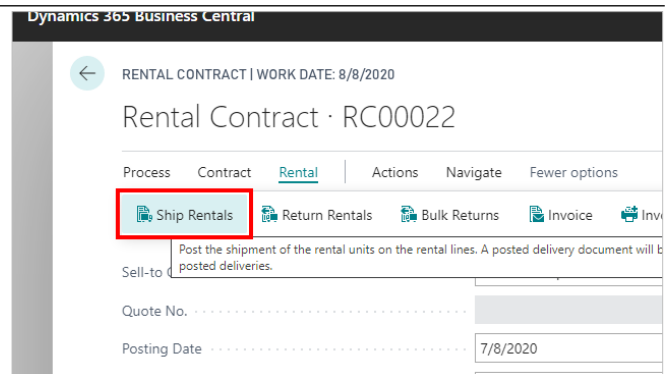
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/8/2020

Click on the navigation menu item **Ship Rentals**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00022

Process Contract Rental Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice Inv

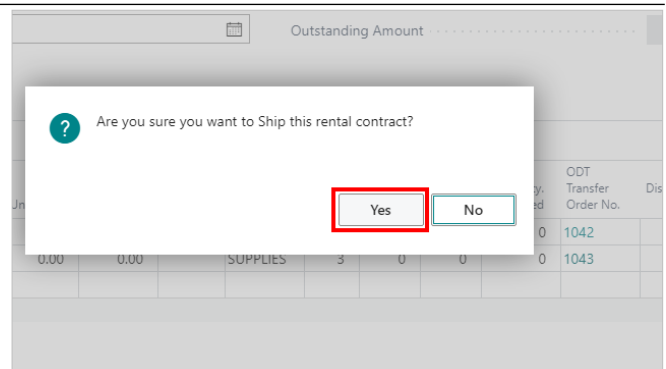
Post the shipment of the rental units on the rental lines. A posted delivery document will be created for the posted deliveries.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/8/2020

Click on the button **Yes**



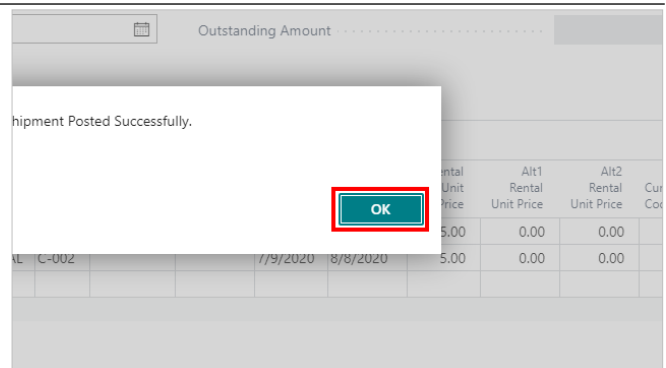
Outstanding Amount 0.00

Are you sure you want to Ship this rental contract?

Yes No

Item No.	Description	Quantity	Unit Price	Total Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cust. Order No.
000	SUPPLIES	3	0.00	0.00	0.00	0.00	1042
000	SUPPLIES	3	0.00	0.00	0.00	0.00	1043

Click on the button **OK**



Outstanding Amount 0.00

Shipment Posted Successfully.

OK

Item No.	Description	Quantity	Unit Price	Total Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cust. Order No.
000	SUPPLIES	3	0.00	0.00	0.00	0.00	1042
000	SUPPLIES	3	0.00	0.00	0.00	0.00	1043

3.17.5.3. Processing Partial Returns of Units Linked to Items in Bins

The following example demonstrates the process for partial returns, when Rental Units are linked to Items stored in Bins. In the example, 2 of the 3 units out on rent are being returned to the same Location, but a different Bin than they were shipped from.

In order to return the items to a different Bin, the Return to Bin Code field will need to be added to the Rental Line using Personalize.



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

7/8/2020

7/7/2020 Type the date

7/8/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

Click on the link **Next**

Adatum Corporation

7/8/2020

July 2020

Next

Functions

Click on **Rental Unit No. = RU00026, Rental Terms Code = MONTH-PEND, Rental Quantity = 3**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
→ RU00026	:	Wacker Hammer Drill Bits 3/16...	MONTH-PEN				
RU00026	:	Wacker Hammer Drill Bits 3/16...	MONTH-PEN				

Sales Lines				Manage	Line	Fewer options
-------------	--	--	--	--------	------	---------------



ODT Rentals Online Help

Click on the cell **Bin Code** with the value **C-002**

The rental items were shipped from the bin C-002, that is displayed in the Bin Code field.

options									
	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	
Bits 3/16...	MONTH-PEND	2	CENTRAL	C-001			7/9/2020	8/8/2020	
Bits 3/16...	MONTH-PEND	3	CENTRAL	C-002			7/9/2020	8/8/2020	
Look up value									

Click on the cell **Qty. to Return** with the value **0**

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Bill...
0.00		SUPPLIES	0	2	0	0	1042	0	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	3	0	0	1043	0	<input checked="" type="checkbox"/>

Enter the text **2**.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Bill...
0.00		SUPPLIES	0	2	0	0	1042	0	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	3	2	0	1043	0	<input checked="" type="checkbox"/>

Click on the button **Yes**

Outstanding Amount

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes **No**

ODT Transfer Order No.	Dis
0 1042	
0 1043	



ODT Rentals Online Help

Click on the cell **Return Bin Code** with the value **C-002**

Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...	Return Bin Code	Partial Return Date	Department Code	Customergro... Code
0	0	1042	0	<input checked="" type="checkbox"/>	C-001			
2	0	1043	0	<input checked="" type="checkbox"/>	C-002			
Look up value								

Click on the lookup button in the cell **Return Bin Code**

Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %	Ret... Day Billa...	Return Bin Code	Partial Return Date	Department Code	Customergro... Code
0	0	1042	0	<input checked="" type="checkbox"/>	C-001			
0	0	1043	0	<input checked="" type="checkbox"/>	C-002	8/7/2020		
Look up value								

Click on the link in cell **Code** with the value **C-001**

When the return is posted the rental items will be returned to the selected Bin C-001.

Code	Description
C-001	Central Bin C-0
Select record "C-001"	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00022 | WORK DATE: 8/8/2020

Rental Contract · RC00022

ProcessContractRentalActionsNavigateFewer options

General

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date8/7/2020



Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00022 | WORK DATE: 8/8/2020

Rental Contract · RC00022

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

Post the return of the rental units on the rental lines. A posted re
turns.

Sell-to Customer Name Hestem Corporation

Quote No.

Posting Date 8/7/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

ODT Qty. Tran
Returned Ord
0 0 104
5.00 0.00 0.00 SUPPLIES 0 3 2 0 104

Click on the button **OK**

Outstanding Amount

Return Posted Successfully.

OK

ODT Line Ret...
Transfer Order No. % Day Billa...
0 1042 0 ✓
0 1043 0 ✓

0.00 SUPPLIES 0 3 2 0

Click on **Rental Unit No. = RU00026, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**

Note the Rental Line is split into 2 lines when the return is posted for the partial return. The new Rental Line contains the remaining quantity in the Qty. on Rent field.

Rental Lines	Manage	Line	Functions	Fewer options		
Rental Unit No.	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
RU00026	CENTRAL	C-001			7/9/2020	8/8/2020
→ RU00026	⋮ CENTRAL	C-002			7/9/2020	8/7/2020
RU00026	⋮ CENTRAL	C-002			7/9/2020	8/8/2020

Sales Lines	Manage	Line	Fewer options
-------------	--------	------	---------------



ODT Rentals Online Help

Click on the cell **Qty. on Rent** with the value **1**

Alt1 Rental Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	ODT Transfer Order No.	Line Disco... %
0.00	0.00		SUPPLIES	0	2	0	0	1042	0
0.00	0.00		SUPPLIES	0	0	0	2		0
0.00	0.00		SUPPLIES	0	1	0	0	1043	0

The following demonstrates the returning of the remaining quantity on rent on the Rental Line created by the partial return.
The return will occur on the date displayed in the Rental Return Date field and be returned to the Bin it was shipped from.

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

8/7/2020

7/7/2020 Type the date in the format M/d/yyyy

8/7/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Adatum Corporation

8/7/2020

August 2020

Su Mo Tu We Th Fr Sa

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

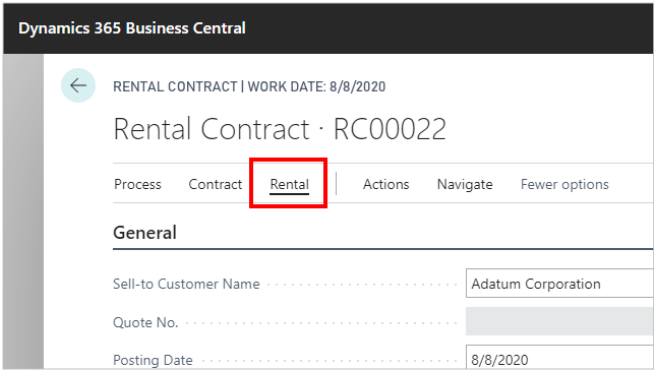
30 31

Go to today Done

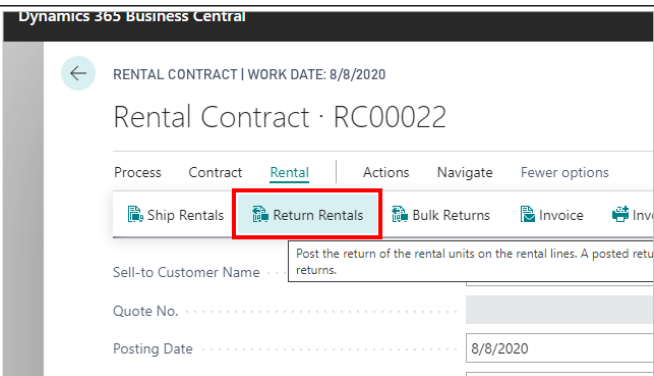
Rental Quantity Local Code Code Alt1 Code Alt2 Rental Start Date Rental Return Date Rental Unit Price Uni



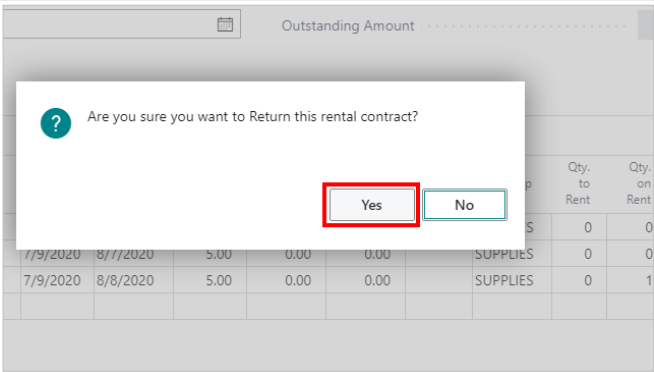
Click on the navigation menu item popup **Rental**



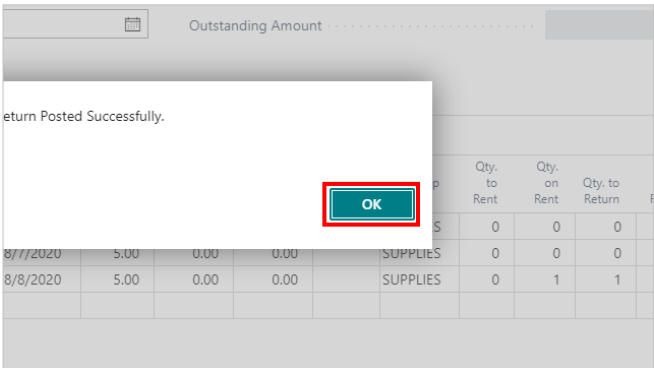
Click on the link **Return Rentals**



Click on the button **Yes**



Click on the button **OK**



3.18.Swapping Rental Units

3.18.1. Swapping Rental Units Overview

3.18.1.1. Overview

On occasion an exchange of one unit out on rent for another may be required. This could be due to a breakdown or scheduled maintenance on the unit out on rent.

This feature is restricted to Rental Units assigned to Rental Unit Groups. Units that are not assigned to a group

cannot be swapped or exchanged.

ODT Rentals provides 2 methods for handling the swap/exchange of rental units that are out on rent.

- the ability to swap a single unit from the rental lines Functions menu option, Rental Swap.
- the ability to process the exchange of 1 or more units from the contract Rental menu option, Rental Exchange.

On the Rental Lines, the field, Replaced By, can be added using Personalize. When a Rental Unit has been swapped or exchanged, then on the original rental unit rental line, the Rental Unit No. of the replacement unit will be displayed in this field.

When a Rental Swap or Rental Exchange is processed, then on the Rental Contract the Posting Date and Document Date are updated to the Swap Date.

3.18.1.1.1. Rental Swap from the Rental Line Menu

When swapping Rental Unit using the Rental line, Functions menu option, Rental Swap, the following applies to the swap:

- The original unit is automatically returned to the rental location it was shipped from
- The new unit selected must be located in and shipped from the same location as the original unit was shipped from

3.18.1.1.2. Rental Exchange from the Contract Menu

The Rental Exchange function provides the ability to:

- Return or not return the original rental unit at the same time of processing the exchange
- Return the original unit to a different or temporary rental location
- Replace the original unit with a unit located in a different rental location
- Replace the original unit with a substitute unit from a different group
- Process the return of the original unit at a later date
- Creates a single Posted Rental Return document for all units returned in the exchange
- Creates a single Posted Rental Delivery document for all units shipped in the exchange

IMPORTANT NOTE for Release 8.1

In Release 8.1, the Rental Exchange should not be exchange of rental units with metered usage or periodic usage pricing due to a known issue.

Please see the ODT Rentals ODT Rentals North American Release Notes V8.1.0.2 Revision 2.

3.18.1.1.3. Posted Rental Documents

The Posted Rental Delivery and Posted Rental Return documents generated by the swap or exchange will have a Posting Date and Document Date equal to the swap date specified.

On the Posted Rental Delivery when the shipped unit is a replacement unit, then a comment will print beneath the shipped rental unit line advising which rental unit the shipment was replacing.

3.18.2. Rental Swap from Rental Line Menu

3.18.2.1. Rental Swapping from the Rental Line Overview

3.18.2.1.1. Processing Overview

The processing steps for the Rental Swap from the Rental line Functions menu option:

- Selecting the Rental Line of the Rental Unit to be swapped
- Selecting the menu option, Rental Swap, located in the Rental Lines, Functions menu
- Specifying the swap date the exchange is occurring on



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- Selecting the Rental Unit that will replace the original rental unit

Processing Information

The following provides detailed information of what occurs when the Rental Swap is processed.

Original Rental Unit Returned

When the original unit is returned, then on the original rental unit contract line:

- The Rental Return Date is updated to the Swap Date and cannot be modified
- The Rental Billing End Date will be updated to the Swap Date, if an invoice has not been posted that includes the original unit
- The Rental Billing End Date will be set to the date in the Ending Date-Time field of the last invoiced Rental Amount line with the type of Rental when an invoice has been posted which includes the original rental unit
- The Rental Billing End Date cannot be modified on the original unit rental line
- The Qty. to Return will be populated on the original Rental Unit line to be returned during the swap process and the return of the unit will be to the Rental Location the unit was shipped from.
- The rental return will be automatically posted
- A Posted Return Delivery document will be created which will include the Rental Unit returned during the rental swap process

Replacement Units

- A new rental line will be created for each of the new replacement Rental Unit
- The Rental Start Date is essentially set to the day after the swap date
- When the original rental unit line had a Rental Return Date, prior to the exchange, then the replacement rental unit line, Rental Return Date, will be set to the that date
- If the Rental Return Date on the original unit line was blank, then the Rental Return Date will be blank on the new unit rental line
- The Rental Billing Start Date will be set to the original unit Rental Billing Start Date if no invoices have been posted that include the original rental unit
- When an invoice(s) existed on the original unit line, then the Rental Billing Start Date will be set to the day after the Rental Billing End Date on the original rental unit line of the last invoice
- The Rental End Billing Date will be set to the same date that was on the original rental unit line prior to processing the rental swap
- The shipment of the replacement rental unit will be automatically posted
- A Posted Rental Delivery document will be created, which will include the Rental Unit shipped during the rental swap process

3.18.2.1.2.

Rental Swap Page Fields

The following provides an overview of the fields on the Rental Swap page.



Rental Unit Swap Page

Rental Unit Swap - Order - RC00001 - 20000 - 10000 - 1 - New

Document

Rental Contract No. RC00001 Swap Date 4/12/2021

Swap Details

Original New

Rental Unit No. RU00011-001 Rental Unit No. <NEW>

OK Cancel

Rental Contract No.:

- Displays the Rental Contract No. that the swap is occurring on.

Swap Date:

- The date the swap is occurring on is to be entered in this field. The user work date defaults to the field.

Original - Rental Unit No.:

- Displays the Rental Unit No. that will be returned when the swap is processed.

New - Rental Unit No.:

- The replacement unit is to be selected in this field. When OK is selected on the page, then the Rental Swap will be processed.

3.18.2.2. How to Swap a Rental Unit Out on Rent from the Rental Line Menu

3.18.2.2.1. Overview

This example demonstrates a rental swap for a recurring monthly rental with billing at the end of each rental period.

On the Rental Contract Rental Lines, the Rental Return Date is automatically populated and will be overridden to be for a two month rental and the Return Day Billable field checked.

The first invoice will be posted, then one of the units will be swapped five days later.

NOTE:

For swapping units that have Metered Usage pricing, see ODT Rentals Online Help, Additional Processes, Metered Usage.

For swapping units that have Periodic Usage pricing, see ODT Rentals Online Help, Additional Processes, Periodic Usage and Standby Charges.

3.18.2.2.2. How to Process a Rental Swap

Profile - Sales Order Processor

The same steps apply to a user with the Business Manager Profile.

The following steps demonstrate the creation of the contract, the shipping of the units and the posting of the first invoice.

The rental will start on 4/9/2018 and the units are to



be returned 6/8/2018.

The units will be shipped on 4/9/2018.
The first invoice for 5/8/2018 will be posted.

Click on the navigation menu item **Rental Contract**

Self-Service ▾

[Credit Memos](#) [Sales Return Orders](#) [Items](#) [Customers](#) [Item Journals](#) [Sales Journals](#)

ACTIONS

+ Sales Quote	+ Sales Return Order	+ Rental Contract	> Sales
+ Sales Invoice	+ Sales Credit Memo	+ Rental Contract	Create a new rental contract for rental product a
+ Sales Order	+ Rental Quote	> Tasks	> Rental Management

Click on the field **Sell-to Customer Name**

Rental | Actions | Navigate | Less options

Proforma

<input type="text"/>	Ext
<input type="text"/>	Ren
<input type="text"/>	Dep
<input type="text"/>	Cor
<input type="text"/>	Out

Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta

Print... [Print Proforma](#)

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Current Date

NO.	NAME	CI
10000	Adatum Corporation	At
20000	Adatum Research	Ch
30000	School of Fine Art	Mi
40000	Alpine Ski House	At
50000	Relecloud	At

Rental Lines | [Manage](#) | More options | + New

Click on the cell **Rental Unit No.**

Rental Lines | [Manage](#) | More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collapse All](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
<input type="text"/>		

Sales Lines | [Manage](#) | More options



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines | [Manage](#) | More options

[New Line](#) [Delete Line](#) [Expand All](#) [Collaps](#)

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
	...	
Look up value		

Sales Lines | [Manage](#) | More options

Click on the link in cell **No.** with the value **RU00001**

NO. RENTAL UNIT LIST + New

RC0001

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00001	Select record "RU00001"	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Terms Code**

[Manage](#) | More options

[Delete Line](#) [Group Avail Matrix](#)

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-PEND	0	

Manage

UNIT OF

Click on the cell **Rental Quantity**

More options

[Group Avail Matrix](#)

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-P	0		

UNIT OF



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Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Buckeye Ditcher Group	MONTH-PEND	<input type="text" value="2"/>		

UNIT OF

Click on the cell **Location Code**

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2
Buckeye Ditcher Group	MONTH-PEND	2	<input type="text" value=""/>		

UNIT OF

Click on **Code = EAST, Name = East Warehouse**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-PEND	2	<input type="text" value=""/>		4/9/2018

CODE NAME

EAST East Warehouse

RE Select record "EAST" Inventory Items Re

WEST West Warehouse

+ New

LOCATION CODE	QUANTITY	MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	AT EX
	0		0.00	*	

Click on the cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
<input type="text" value=""/>		4/9/2018	<input type="text" value="5/8/2018"/>	500.00	0.00

Type the date in the format M/d/yyyy

LINE AMOUNT



Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
		4/9/2018	5/8/2018	500.00	0.00	0.00	
Select a date							
LINE AMOUNT							

Click on the link **Next**

RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
4/9/2018	5/8/2018	500.00	0.00	0.00	
May 2018					
Mo Tu We Th Fr Sa Su					
1 2 3 4 5 6					
7 8 9 10 11 12 13					
14 15 16 17 18 19 20					
21 22 23 24 25 26 27					
28 29 30 31					
LIN AMOUNT					
QUANTITY					

Click on a date in the calendar

Select June 8, 2018 as the Rental Return Date.

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	ALT2 RENTAL UNIT PRICE	QTY.
	4/9/2018	5/8/2018	500.00	0.00	0.00	
June 2018						
Mo Tu We Th Fr Sa Su						
1 2 3						
4 5 6 7 8 9 10						
11 12 13 14 15 16 17						
18 19 20 21 22 23 24						
25 26 27 28 29 30						
TAX GROUP						
CODE						
AMOUNT						
EXCL. TAX						
Today Done						
QTY. TO SHIP						
QUANTITY SHIPPED						
0.00 0.00 0 0 0						

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		Buckeye Ditcher Group
		Buckeye Ditcher Group
Sales Lines		
Manage		
More options		



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00003**

RENTAL UNIT LIST + New			
NO.		DESCRIPTION	GROUP
BD-006	:	Buckeye Ditcher	
RU00002	:	Buckeye Ditcher	
RU00003	:	Buckeye Ditcher	
RU00004	:	Buckeye Ditcher	
RU00005	:	Buckeye Ditcher	
RU00006	:	Buckeye Ditcher	
SUB BUCKEYE	:	Sub Buckeye Ditcher	

Click on the navigation menu item popup **Rental**

amics 365

Business Central

Rental Contract · RC00027

←

RENTAL CONTRACT

Rental Contract · RC00027

Process

Contract

Rental

Actions

Navigate

Less

Print...

Print Proforma

General

Sell-to Customer Name Adatum Corporation

Click on the navigation menu item **Ship Rentals**

amics 365

Business Central

Rental Contract · RC00027

←

RENTAL CONTRACT

Rental Contract · RC00027

Process

Contract

Rental

Actions

Navigate

Less

Ship Rentals

Return Rentals

Invoice

Invoice

Post the shipment of the rental units on the rental lines. A posted del

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the button **Yes**

Contract Total

Outstanding Amount

?

Are you sure you want to Ship this rental contract?

Yes

No

Yes

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/9/2018	6/8/2018	
1	EAST			4/9/2018	6/8/2018	



ODT Rentals Online Help

Click on the button **OK**

ment Posted Successfully.

OK

AL	LOCATION	RENTAL	RENTAL	RENTAL	RENTAL	RENTAL
ITY	CODE	TERMS	TERMS	START	RETURN	UNIT
		CODE ALT1	CODE ALT2	DATE	DATE	PRICE
2	EAST			4/9/2018	6/8/2018	500.00
1	EAST			4/9/2018	6/8/2018	500.00

Click on the field **Posting Date**

Return Rentals Invoice Invoice and Print Posted Deliveries Post

Adatum Corporation

4/9/2018

4/9/2018

4/9/2018

Manage More options

Click on the link

Invoice and Print Posted Deliveries Posted Returns Posted Invoice

corporation

External Document No.

Rental Terms Code

Deposit Amount

Select a date

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

4/9/2018

April 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

ge More opti



ODT Rentals Online Help

Click on a date in the calendar

Select May 8, 2018 as this is the Billing Date for the first invoice.

NOTE:

The Billing Date can be determined by looking at the Rental Amount Lines for one of the child unit lines.

To check the Rental Amount Lines:

In the Ribbons, select Rental Lines - Line, and then Rental Amount Lines.

Click on the navigation menu item **Invoice**

The screenshot shows a form with fields for Customer Name (Adatum Corporation), Invoice No., Invoice Date (4/9/2018), and other details. A calendar for May 2018 is displayed, with the date 8 highlighted. Below the calendar, there are buttons for 'Manage', 'Delete Line', and 'Group'. At the bottom, there is a ribbon menu with 'RENTAL' selected, and a sub-menu with 'STANDARD' and 'RENTAL' options. The 'RENTAL' sub-menu is further expanded, showing 'RENTAL' and 'RENTAL' options.

Click on the button **Yes**

The screenshot shows a 'RENTAL CONTRACT' page for 'Rental Contract · RC00027'. It has tabs for 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Rental' tab is active, and the 'Invoice' button is highlighted. Below the tabs, there is a 'General' section with fields for 'Sell-to Customer Name' (Adatum Corporation) and 'Quote No.'. A confirmation dialog box is displayed, asking 'Are you sure you want to Invoice this rental contract?' with 'Yes' and 'No' buttons. Below the dialog, there is a table with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE. The table contains two rows of data.

Click on the button **OK**

The screenshot shows a confirmation dialog box with the message 'Invoice Posted Successfully.' and an 'OK' button. Below the dialog, there is a table with columns: RENTAL QUANTITY, LOCATION CODE, RENTAL TERMS CODE ALT1, RENTAL TERMS CODE ALT2, RENTAL START DATE, RENTAL RETURN DATE, and RENTAL UNIT PRICE. The table contains two rows of data.

The following demonstrates the steps to review the Rental Amount Lines on the first child unit, for comparison purposes to after the swap has been completed.



Click on the cell **Rental Unit No.**

Rental Lines

Manage

More options

New Line

Delete Line

Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00003	:	Buckeye Ditcher

Sales Lines

Manage

Click on the navigation menu item **More options**

Quote No.

Posting Date

Order Date

Document Date

5/8/2018

4/9/2018

5/8/2018

Rental Lines

Manage

More options

New Line

Delete Line

Reveal secondary actions

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001	:	Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item popup **Line**

Quote No.

Posting Date

Order Date

Document Date

5/8/2018

4/9/2018

5/8/2018

Rental Lines

Manage

Line

Functions

Less options

New Line

Delete Line

Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001	:	Buckeye Ditcher Group	MONTH-PEND

Click on the navigation menu item **Rental Amount Lines**

Posting Date

Order Date

Document Date

5/8/2018

4/9/2018

5/8/2018

Rental Lines

Manage

Line

Functions

Less

Rental Amount Lines

Rental Ledger Entries

Ren

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001	:	Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher



Click on the cell **Billing Date** with the value **5/8/2018**

Note that the rental charge and damage waiver charge for the first invoice have the Billed field checked, and the Invoice No. field is populated.

There is a rental charge and damage waiver charge line for the second rental period, which remain to be invoiced.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
51.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
1.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
0.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
1.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
2,244.00				




The following demonstrates the processing of the swapping of the first child unit line, returning it and shipping out a replacement unit.

The swap will take place on May 13, 2018.

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher

Click on the navigation menu item popup **Functions**

Quote No.		
Posting Date		5/8/2018
Order Date		4/9/2018
Document Date		5/8/2018
Rental Lines | Manage | Line | Functions | Less options		
 Rental Amount Lines	 Rental Ledger Entries	 Rental Value Entries
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group



Click on the navigation menu item **Rental Swap**

The screenshot shows the 'Rental Swap' option highlighted in a red box within the 'Functions' tab of the 'Rental Lines' section. The background shows a table with rental unit details.

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENT TERM CODE
RU00001		Buckeye Ditcher Group	MONT
RU00002		Buckeye Ditcher	MONT

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to swap rental unit RU00002?'. The 'Yes' button is highlighted in a red box. The background shows a table with rental unit details.

RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENT
2	EAST			4/9/2018	6/8/2018	
1	EAST			4/9/2018	6/8/2018	

Click on the button **OK**

The screenshot shows a dialog box with the text 'Please select the new Rental Unit and complete the indicated'. The 'OK' button is highlighted in a red box. The background shows a table with rental unit details.

AL	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
2	EAST			4/9/2018	6/8/2018	500.00
1	EAST			4/9/2018	6/8/2018	500.00

Click on the field **Swap Date**

The users Work Date will default to this field.

This actual date the swap is to occur must be entered in this field.

IMPORTANT

This date impacts the posting date of the rental ledger entries created. This date also impacts the dates used in the Posted Rental Return in the initial unit and the Posted Rental Delivery created that will populate on the new units' Rental Start Date and Rental Return Date for the new unit.

The screenshot shows the 'Rental Unit Swap - ORDER' form. The 'Swap Date' field is highlighted in a red box and contains the date '4/9/2018'. The background shows a table with rental unit details.

ORIGINAL	NEW
Rental Unit No.	RU00002




ODT Rentals Online Help

Click on the link

WAP - ORDER - RC00027 - 20000 - 10000 - 1 - NEW

Contract No. RC00027

Start Date 4/9/2018 

Select a date

Details


NEW


Contract No. RU00002 Rental Unit No. <NEW>

Click on the link **Next**

WAP - ORDER - RC00027 - 20000 - 10000 - 1 - NEW

Contract No. RC00027

Start Date 4/9/2018 

April 2018 

Mo	Tu	We	Th	Fr	Sa	Su
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Details


NEW


Contract No. Rental Unit No. <NEW>

Click on a date in the calendar
For this example May 13, 2018 has been selected.

WAP - ORDER - RC00027

Contract No. RC00027

Start Date 4/9/2018 

May 2018 

Mo	Tu	We	Th	Fr	Sa	Su
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Details

NEW

Contract No. Rental Unit No. <NEW>

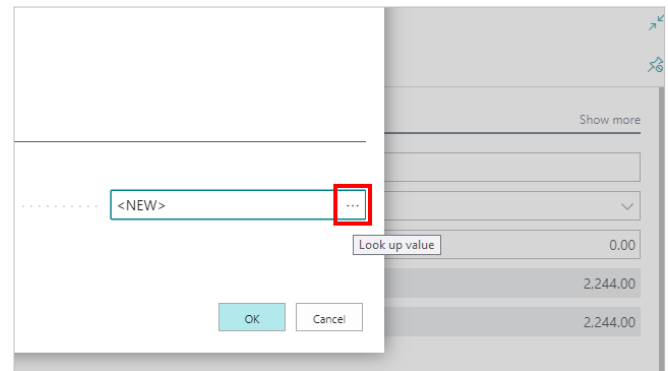
Click on the field **Rental Unit No.**

NEW

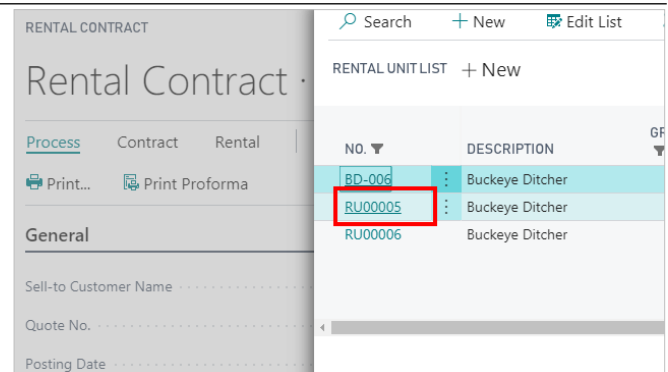
Rental Unit No. <NEW> ...

OK Cancel

Click on the lookup button

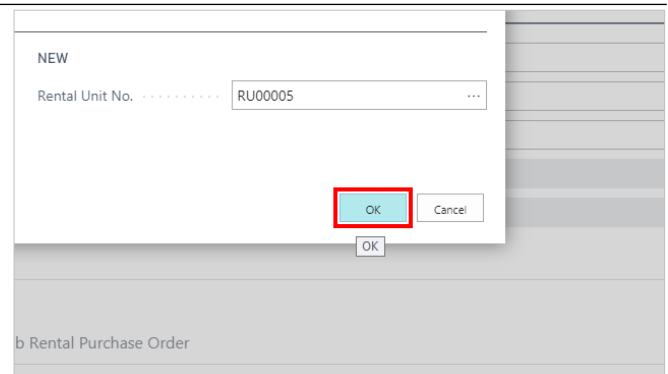


Click on the link in cell **No.** with the value **RU00005**
Select the unit that is to be shipped out to replace the initial unit.



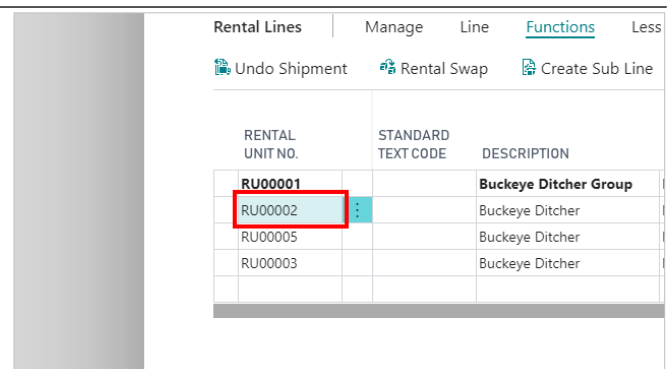
NO.	DESCRIPTION	GF
BD-006	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the button **OK**



The following shows the results of the swap for the contract dates and the Rental Line dates for the initial and new units after the swap.

Click on the cell **Rental Unit No.**
Select the child line for the unit which was returned in the swap process.



RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher
RU00005		Buckeye Ditcher
RU00003		Buckeye Ditcher



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Click on the cell **Rental Return Date** with the value **5/13/2018**

The Rental Return Date is automatically set to the Swap Date that was selected.

Open Sub Rental Purchase Order

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	A
		4/9/2018	6/8/2018	500.00	0.00	
		4/9/2018	5/13/2018	500.00	0.00	
		5/14/2018	6/8/2018	500.00	0.00	
		4/9/2018	6/8/2018	500.00	0.00	

Click on the cell **Rental Unit No.**

Select the child line for the unit which was shipped out in the swap process.

Undo Shipment Rental Swap Create Sub Line

RENTAL UNIT NO.	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE
RU00001	4/9/2018	6/8/2018	500.00
RU00002	4/9/2018	5/13/2018	500.00
RU00005	5/14/2018	6/8/2018	500.00
RU00003	4/9/2018	6/8/2018	500.00

Sales Lines Manage

Click on the cell **Rental Start Date**

As the initial unit is returned on May 13, 2018 at 11:59:59 PM, the Rental Start Date of the replacement unit must be one second later for billing purposes.

Therefore the Rental Start Date is May 14, 2018 at 12:00:00 AM for the replacement unit.

(s) Open Sub Rental Purchase Order

LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE
EAST			4/9/2018	6/8/2018	500.00	
EAST			4/9/2018	5/13/2018	500.00	
EAST			5/14/2018	6/8/2018	500.00	
EAST			4/9/2018	6/8/2018	500.00	

Click on the cell **Rental Return Date**

For the replacement unit, the Rental Return Date has been set to be the same as the group line.

When the swap occurs on a date which requires a different Rental Return Date than the group line, the date will be the end of the next rental period which has not been billed.

Open Sub Rental Purchase Order

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE	A
		4/9/2018	6/8/2018	500.00	0.00	
		4/9/2018	5/13/2018	500.00	0.00	
		5/14/2018	6/8/2018	500.00	0.00	
		4/9/2018	6/8/2018	500.00	0.00	



Click on the cell **Rental Unit No.**

Select the rental line for the unit which was returned in the swap process.

Rental Lines

Manage

More options




New Line

Delete Line

Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00003	:	Buckeye Ditcher
RU00003		Buckeye Ditcher

Click on the navigation menu item **More options**

Quote No.		
Posting Date		5/8/2018
Order Date		4/9/2018
Document Date		5/8/2018
Rental Lines	Manage	More options
 New Line	 Delete Line	 Reveal secondary actions
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
		MONTH-PEND




Click on the navigation menu item popup **Line**

Quote No.		
Posting Date		5/8/2018
Order Date		4/9/2018
Document Date		5/8/2018
Rental Lines	Manage	<div>Line</div> FunctionsLess options
New Line	Delete Line	Group Avail Matrix
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTIONRENTAL TERMS CODE
RU00001		Buckeye Ditcher GroupMONTH-PEND

Click on the navigation menu item **Rental Amount Lines**

Posting Date	5/8/2018
Order Date	4/9/2018
Document Date	5/8/2018

Rental Lines	Manage	Line	Functions	Less
--------------	--------	------	-----------	------

 Rental Amount Lines	 Rental Ledger Entries	 Ren
---	---	---

View the rental amount line records that will be billed for the s

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher



ODT Rentals Online Help

Click on the cell **Billing Date** with the value **5/8/2018**
Note that Rental Amount Lines now contains only the records which were billed on the first invoice.
The subsequent records for the second rental period no longer exist on the initial unit.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
51.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030

Click on the button **Close**

0.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030
1.00	SUPPLIES	5/8/2018	<input checked="" type="checkbox"/>	RI00030

Close

Close

2,244.00

The following display the changes to the Rental Amount Lines of the initial unit that was returned in the swap and the Rental Amount Lines created for the replacement unit.

Click on the cell **Rental Unit No.**
Select the rental line containing the replacement unit which was shipped out in the swap process.

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002	:	Buckeye Ditcher
RU00005	:	Buckeye Ditcher
RU00003		Buckeye Ditcher

Sales Lines | Manage

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	5/8/2018
Order Date	4/9/2018
Document Date	5/8/2018

Rental Lines	Manage	<div>Line</div>	Functions	Less options
Rental Amount Lines	Rental Ledger Entries	Rental Value Entries		

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Note that in the Rental Amount Line records that the billing will start as of May 9, 2018 and end as of June 8, 2018.

The next invoice (Billing Date), on June 8, 2018, will include the billing for the replacement unit for the next rental period.

Click on the cell **Starting Date-Time** with the value **5/9/2018 12:00 AM**

TYPE	STARTING DATE-TIME	ENDING DATE-TIME
Rental	5/9/2018 12:00 AM	6/8/2018 11:59 PM
Damage Waiver	5/9/2018 12:00 AM	6/8/2018 11:59 PM

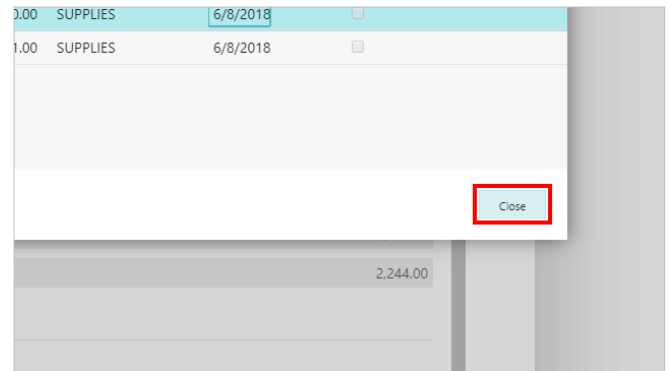
Click on the cell **Ending Date-Time** with the value **6/8/2018 11:59 PM**

TYPE	STARTING DATE-TIME	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	5/9/2018 12:00 AM	6/8/2018 11:59 PM	
Damage Waiver	5/9/2018 12:00 AM	6/8/2018 11:59 PM	

Click on the cell **Billing Date** with the value **6/8/2018**

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Click on the button **Close**



3.18.3. Rental Exchange from Contract Menu

3.18.3.1. Rental Exchange Processing Overview

3.18.3.1.1. Overview

The processing of rental exchanges entails:

- Specifying the swap date the exchange is occurring on
- Selecting the Rental Units on the rental lines that are to be replaced
- Specifying whether the selected unit will be returned at the same time the replacement unit is shipped
- If a unit is to be returned to a different or temporary location specify the location
- If a unit is being returned to a temporary location, provide a description of the temporary location
- Select the replacement unit from either the same REntal Group or a Substitution Unit from a different group
- Process the exchange

Processing Information

The following provides detailed information of what occurs when the exchange is processed

Original Rental Unit Returned

When the original unit is returned, then on the original rental unit contract line:

- The Rental Return Date is updated to the Swap Date and cannot be modified
- The Rental Billing End Date will be updated to the Rental Billing Start Date, if an invoice has not been posted that includes the original unit
- The Rental Billing End Date will be set to the date in the Ending Date-Time field of the last invoiced Rental Amount line with the type of Rental when an invoice has been posted which includes the original rental unit
- The Rental Billing End Date cannot be modified on the original unit rental line
- If a Rental Unit is being returned to a different rental location, then the Return Location Code is updated on the original unit rental line from the Rental Exchange page
- If a Rental Unit is being returned to a temporary location, then the Return Location Code and Temporary Location fields are updated on the original unit rental line from the Rental Exchange page
- The Qty. to Return will be populated on the original Rental Unit lines checked to be returned during the exchange process. rental lines and the returns will be automatically posted
- A single Posted Return Delivery document will be created and will include all Rental Units returned during the exchange process

Original Unit Not Returned

When the original unit is not returned during the exchange process, then on the original unit rental line:

- If a Rental Return Date exists on the original unit rental line, then the Rental Return Date will not be

updated to the Swap Date and can be modified to the date of the return when the unit is subsequently returned

- If the Rental Return Date is blank on the original rental unit line, then the Rental Return Date will be set to the Swap Date and can be modified to the date of the return when the unit is subsequently returned
- The Rental Billing End Date will be updated to the Rental Billing Start Date, if an invoice has not been posted that includes the original unit
- The Rental Billing End Date will be set to the date in the Ending Date-Time field of the last invoiced Rental Amount line with the type of Rental when an invoice has been posted which includes the original rental unit
- The Rental Billing End Date cannot be modified on the original unit rental line
- The Qty. to Return will not be populated and the unit will not be returned

Replacement Units

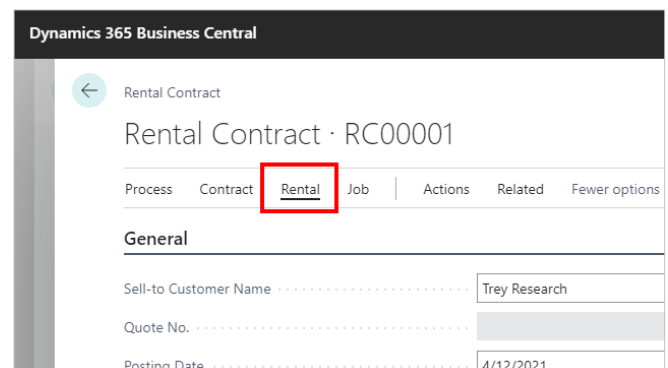
- A new rental line will be created for each of the new replacement Rental Units when the replacement unit is from the same Rental Group as the original unit
- When the replacement unit is from a substitute group, then rental lines for both the replacement rental group and rental unit will be created
- The Rental Start Date is essentially set to the day after the swap date
- When the original rental unit line had a Rental Return Date, prior to the exchange, then the replacement rental unit line, Rental Return Date, will be set to the that date
- If the Rental Return Date on the original unit line was blank, then the Rental Return Date will be blank on the new unit rental line
- The Rental Billing Start Date will be set to the original unit Rental Billing Start Date if no invoices have been posted that include the original rental unit
- When an invoice(s) existed on the original unit line, then the Rental Billing Start Date will be set to the day after the Rental Billing End Date on the original rental unit line of the last invoice
- The Rental End Billing Date will be set to the same date that was on the original rental unit line prior to processing the exchange
- The shipment of the replacement rental units will be automatically posted
- A single Posted Rental Delivery document will be created, which will include all Rental Units shipped during the exchange process

3.18.3.1.2.

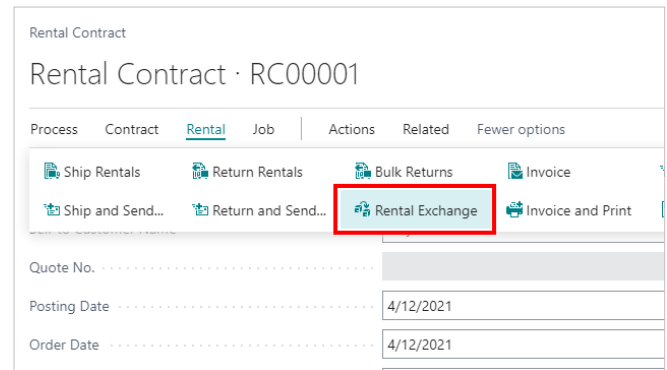
Rental Exchange Page Overview

The following provides an overview of the fields on the Rental Exchange page.

Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Exchange**



Rental Contract

Rental Contract · RC00001

Process Contract Rental Job Actions Related Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice

Ship and Send... Return and Send... **Rental Exchange** Invoice and Print

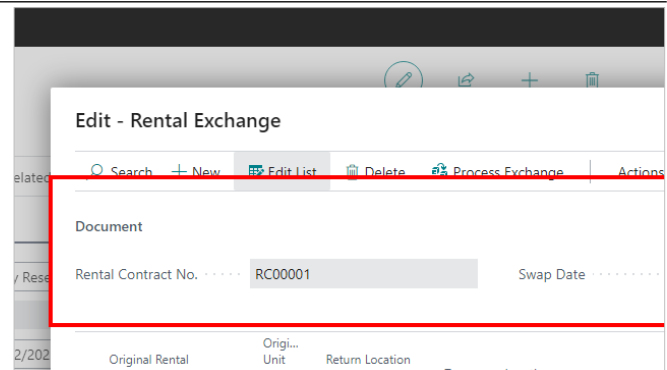
Quote No.

Posting Date 4/12/2021

Order Date 4/12/2021

Document section

- **Rental Contract No.:** Displays the Rental Contract that the exchange is being processed for.
- **Swap Date:** Specifies the date on which the exchange of the Rental Units in the lines is to occur on.



Edit - Rental Exchange

Search + New Edit List Delete Process Exchange Actions

Document

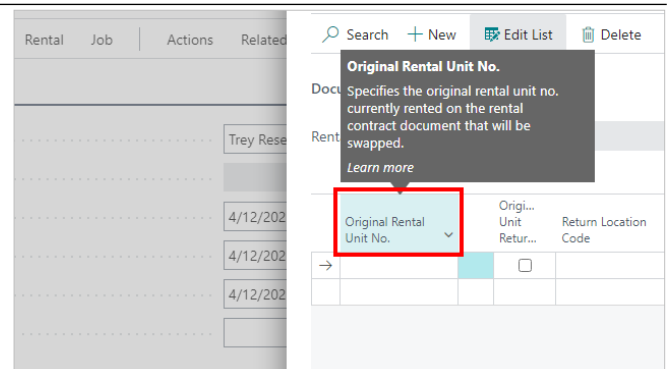
Rental Contract No. RC00001 Swap Date

Original Rental Unit Return Location Temporary Location

Click on the column header **Original Rental Unit No.**

Used for selecting the Rental Units that are to be exchanged.

Multiple units can be selected in the look-up list which will populate the Rental Exchange lines.



Rental Job Actions Related

Search + New Edit List Delete

Original Rental Unit No.

Doc Specifies the original rental unit no. currently rented on the rental contract document that will be swapped.

Learn more

Original Rental Unit No. Return Location Code

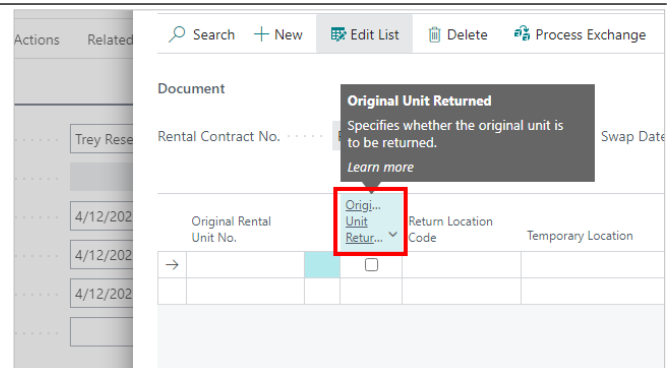
→

Click on the column header **Original Unit Returned**

If the original unit selected is to be returned on the same date of the exchange, then this field must be checked.

If the unit is not or has not been returned at the same time that the replacement unit is shipped, then this field should not be checked.

The original unit can be returned at a later date from the rental contract.



Actions Related

Search + New Edit List Delete Process Exchange

Document

Rental Contract No. Swap Date

Original Unit Returned

Specifies whether the original unit is to be returned.

Learn more

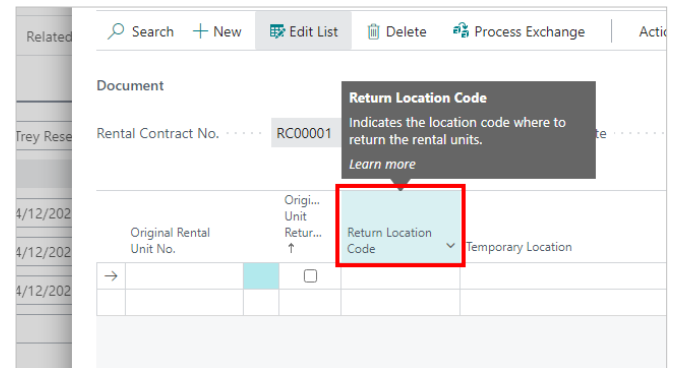
Original Rental Unit No. Return Location Code Temporary Location

→

Click on the column header **Return Location Code**

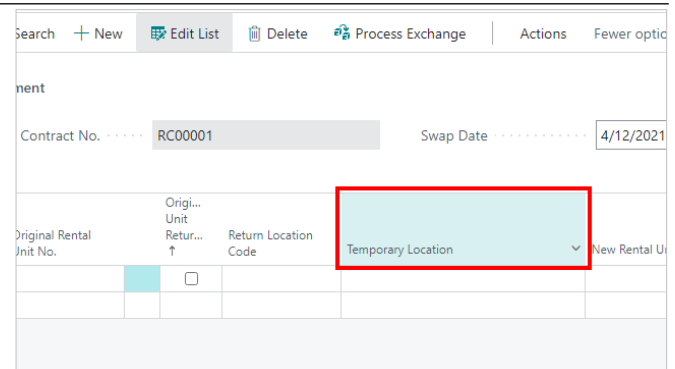
A Return Location Code can only be selected when the Original Unit Returned filed is checked.

This is for selecting a rental location or a temporary location the Rental Unit is to be returned to, when the Location is a different Rental Location, than it was shipped from.



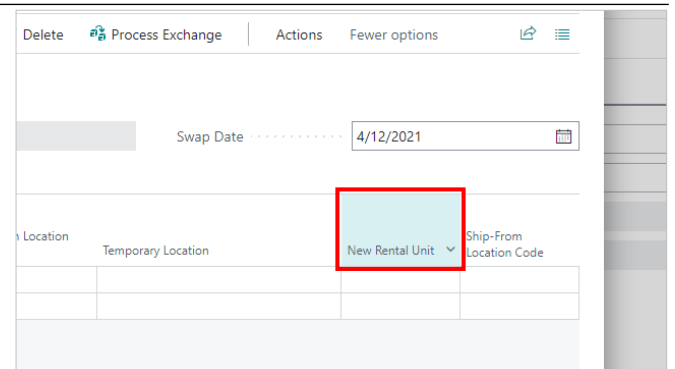
Click on the column header **Temporary Location**

This field is for describing the temporary location the unit is to be returned to, when a temporary location is selected in the Return Location Code field. When a temporary location is selected in the Return Location Code field, then the entry of a description in this field is mandatory.



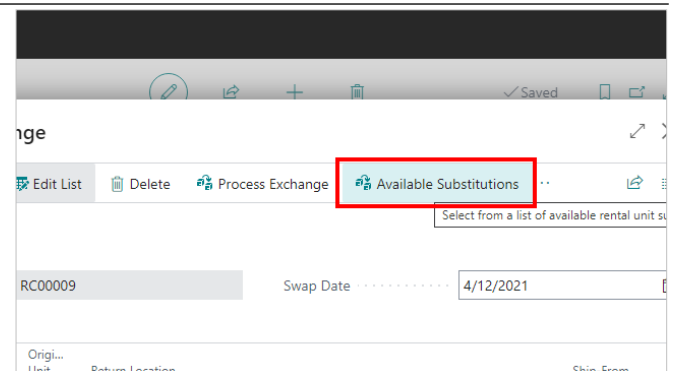
Click on the column header **New Rental Unit**

When the replacement Rental Units are to be from the same Rental Group they are selected in this column.



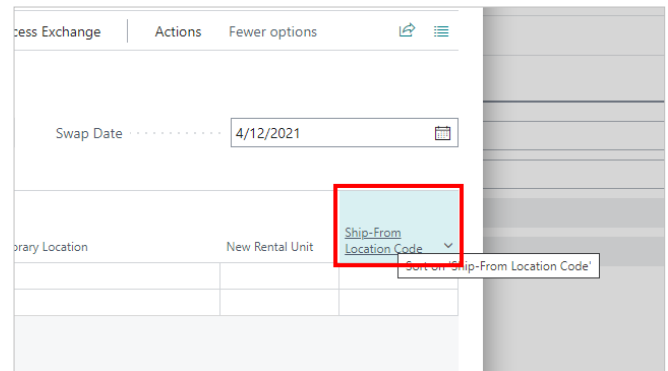
Click on the navigation menu item **Available Substitutions**

When the replacement unit is to be selected from a substitution group then the Rental Unit is to be selected by opening the Available Substitutions list to view and select the replacement unit.

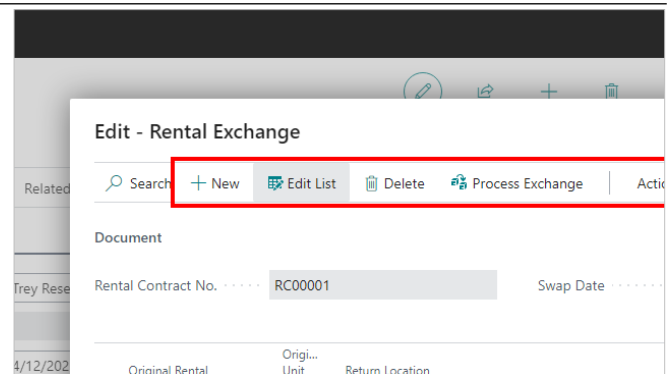


Click on the column header **Ship-From Location Code**

Displays the rental location the selected new rental unit is located in and will be shipped from.



Once the exchange lines have been completed the menu option, Process Exchange must be selected to process the exchange transactions and update the rental lines.



3.18.3.2. How to Exchange Multiple Units Out on Rent

3.18.3.2.1. Overview

The following examples will demonstrate the exchanging of multiple units out on rent from a rental contract, which will include:

- A unit that will be returned to the rental location it was shipped from
- A unit that will be returned to a different rental location than it was shipped from
- A unit that will not be returned during the exchange process
- The selection of replacement units from the same and different rental locations
- The subsequent return of the unit that was not returned during the exchange process

The field, Replaced By, has been added to the Rental Lines using Personalize.

This field will display the Rental Unit No. of the new/replacement unit on the original Rental Unit line once an exchange has been processed.

3.18.3.2.2. Processing a Rental Exchange When No Invoices are Posted

The Rental Term on the contract rental lines is a monthly periodic end term and there has not been an invoice posted on the contract.



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract

Rental Contract · RC00001

Process Contract **Rental** Job Actions Related Fewer options

General

Sell-to Customer Name Trey Research

Quote No.

Click on the navigation menu item **Rental Exchange**

Rental Contract

Rental Contract · RC00001

Process Contract Rental Job Actions Related Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice

Ship and Send... Return and Send... **Rental Exchange** Invoice and Print

Exchange multiple rental units on Contract

Quote No.

Posting Date 4/12/2021

Order Date 4/12/2021

Click on the link **Open the date picker for Swap Date**

The date in the Swap Date field is defaulted from the Users' Work Date. If the exchange of the units has/is occurring on a different date, then the date will need to be changed.

Swap Date 4/12/2021

Temporary Location

Temporary Location

New Rental Unit

Ship-From Location Code

Click on a date in the calendar

Swap Date 4/12/2021

Temporary Location

Temporary Location

New Rental Unit

Ship-From Location Code



ODT Rentals Online Help

Click on the cell **Original Rental Unit No.**

The screenshot shows a 'Document' form with the 'Rental Contract No.' set to 'RC00001'. Below this, there is a table with columns: 'Original Rental Unit No.', 'Original Unit Return...', 'Return Location Code', and 'Temporary Location'. The first row in this table has the 'Original Rental Unit No.' field highlighted with a red box. To the left of this form, a partial view of a table with dates (4/12/2024) is visible.

Click on the lookup button in the cell **Original Rental Unit No.**

The listing will display all the rental units assigned to a group that are out on rental.
Select the rental unit lines which are to be included in the exchange.

This screenshot shows the same 'Document' form as before, but with a dropdown menu open for the 'Original Rental Unit No.' field. The dropdown menu displays 'CAD' and '8/22/2021'. The lookup button (three dots) is highlighted with a red box. The background table with dates is also visible.

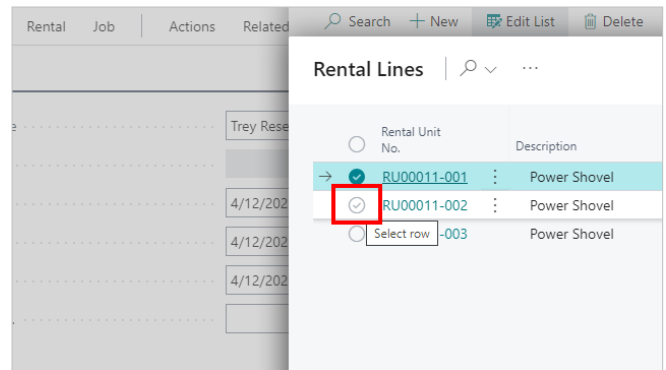
Click on the row menu button

The screenshot shows a 'Rental Lines' table with columns: 'Rental Unit No.', 'Description', and 'Rental Terms Code'. The first row is 'RU00011-001 Power Shovel MONTH-PE'. The row menu button (three dots) for this row is highlighted with a red box. Above the table, there is a toolbar with buttons: 'Search', '+ New', 'Edit List', 'Delete', and 'Process Excl'.

Click on the menu item **Select More**

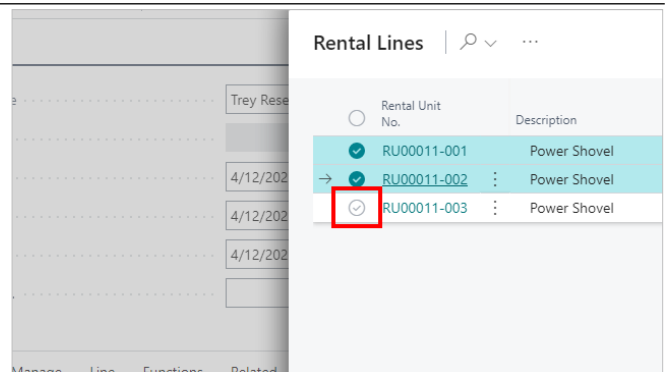
This screenshot shows the 'Rental Lines' table with the dropdown menu open for the first row. The 'Select More' option is highlighted with a red box. The background table and toolbar are also visible.

Click on **Rental Unit No. = RU00011-002, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**



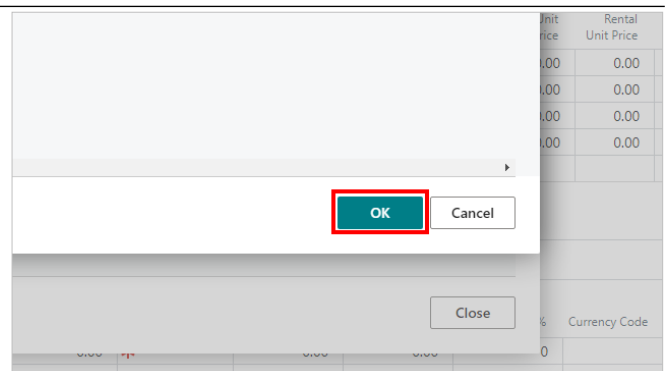
Rental Unit No.	Description
RU00011-001	Power Shovel
RU00011-002	Power Shovel
Select row -003	Power Shovel

Click on **Rental Unit No. = RU00011-003, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**



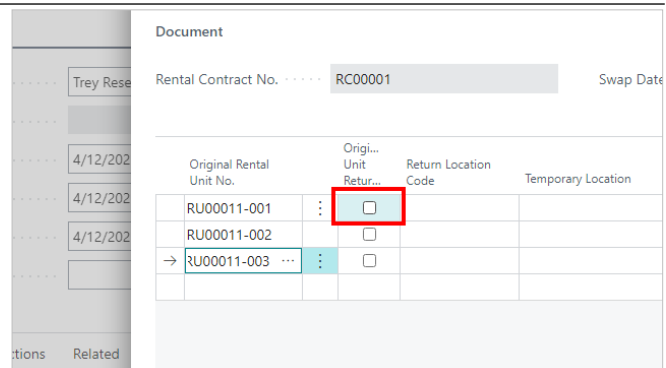
Rental Unit No.	Description
RU00011-001	Power Shovel
RU00011-002	Power Shovel
RU00011-003	Power Shovel

Click on the button **OK**



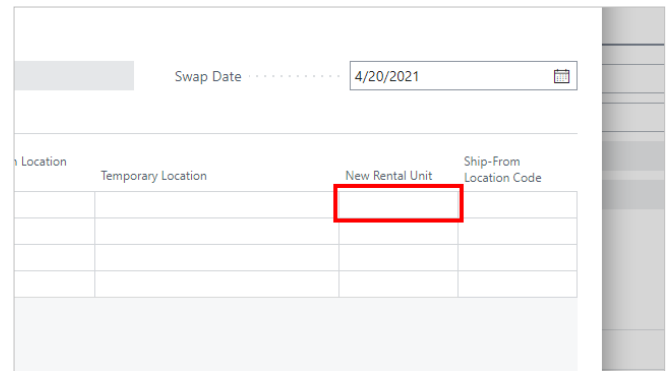
Click on the cell **Original Unit Returned**

If the return of the original rental unit is to be processed, then check the field.



Original Rental Unit No.	Original Unit Returned	Return Location Code	Temporary Location
RU00011-001	<input type="checkbox"/>		
RU00011-002	<input type="checkbox"/>		
RU00011-003	<input type="checkbox"/>		

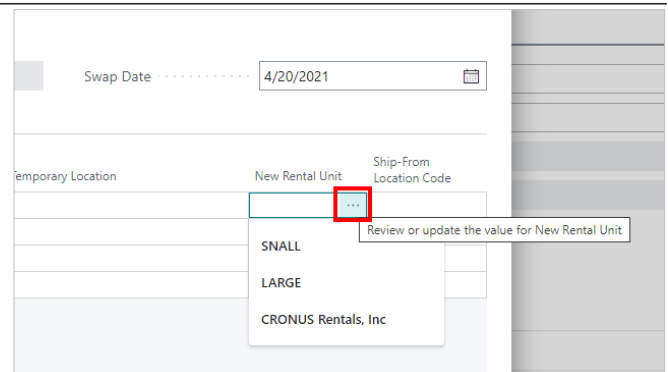
Click on the cell **New Rental Unit**



Swap Date 4/20/2021

Location	Temporary Location	New Rental Unit	Ship-From Location Code

Click on the lookup button in the cell **New Rental Unit**



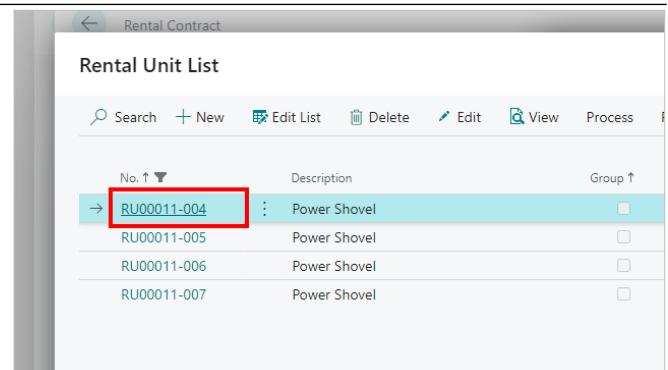
Swap Date 4/20/2021

Temporary Location	New Rental Unit	Ship-From Location Code
	...	

Review or update the value for New Rental Unit

- SMALL
- LARGE
- CRONUS Rentals, Inc

Click on the link in cell **No.** with the value **RU00011-004**



Rental Contract

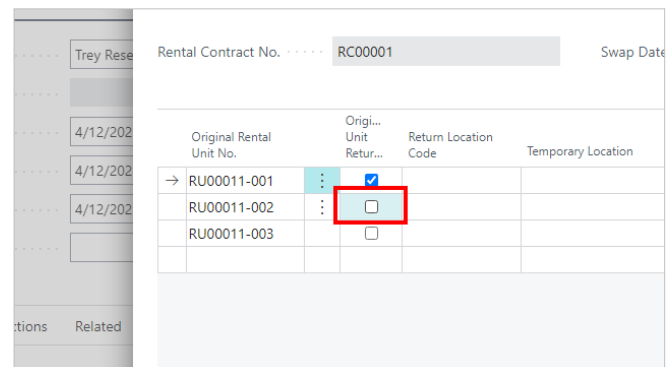
Rental Unit List

Search + New Edit List Delete Edit View Process

No. ↑	Description	Group ↑
→ RU00011-004	Power Shovel	
RU00011-005	Power Shovel	
RU00011-006	Power Shovel	
RU00011-007	Power Shovel	

The following demonstrates the steps for returning the original unit to a different Rental Location.

Click on **Original Unit Returned**



Trey Rese

Rental Contract No. RC00001 Swap Date

Original Rental Unit No.	Original Unit Return	Return Location Code	Temporary Location
→ RU00011-001	<input checked="" type="checkbox"/>		
RU00011-002	<input type="checkbox"/>		
RU00011-003	<input type="checkbox"/>		

ctions Related



ODT Rentals Online Help

Click on the cell **Return Location Code**

Rental Contract No. RC00001		Swap Date	
Original Rental Unit No.	Original Unit Return...	Return Location Code	Temporary Location
RU00011-001	<input checked="" type="checkbox"/>		
→ RU00011-002	<input checked="" type="checkbox"/>		
RU00011-003	<input type="checkbox"/>		

Click on the link in cell **Code** with the value **WEST**

RU00011-003	<input type="checkbox"/>
-------------	--------------------------

Code ↑	Name
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location
WEST	West Warehouse
+ New Select record "WEST"	

NOTE:
If the Return Location Code selected is a Temporary Location, then the Temporary Location field must be populated with a description of the location that the unit will located at.

Click on the cell **New Rental Unit**

Swap Date 4/20/2021		
Temporary Location	New Rental Unit	Ship-From Location Code
	RU00011-004	EAST

Click on the lookup button in the cell **New Rental Unit**

DeleteProcess ExchangeActionsFewer options

Swap Date 4/20/2021

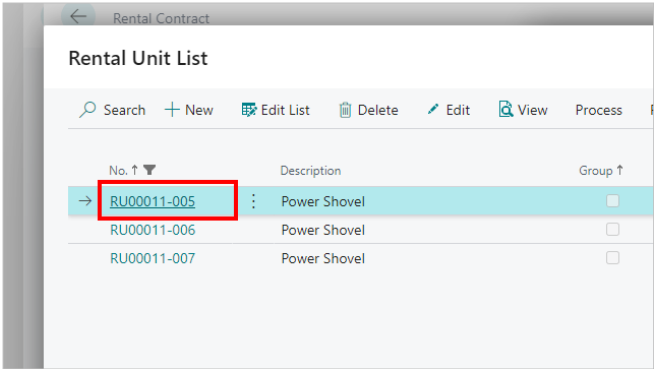
Temporary Location	New Rental Unit	Ship-From Location Code
	RU00011-004	EAST



ODT Rentals Online Help

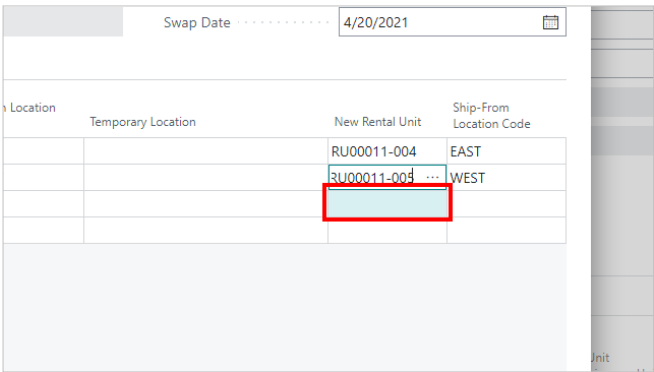
Click on the link in cell **No.** with the value **RU00011-005**

The new Rental Unit selected is located in a different Rental Location that the original Rental Unit.

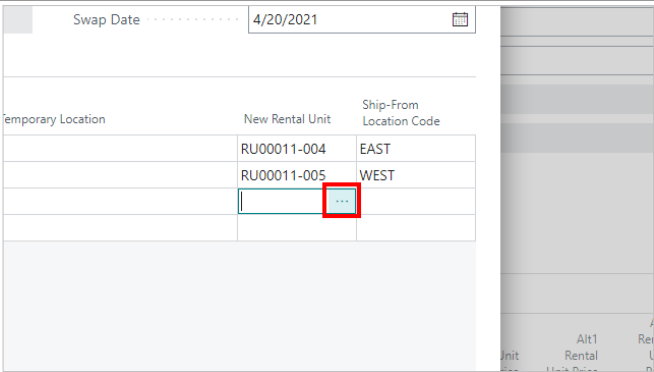


The following demonstrates the steps when the original Rental Unit will not be returned during the exchange process.
The Original Rental Unit will be returned at a later date.

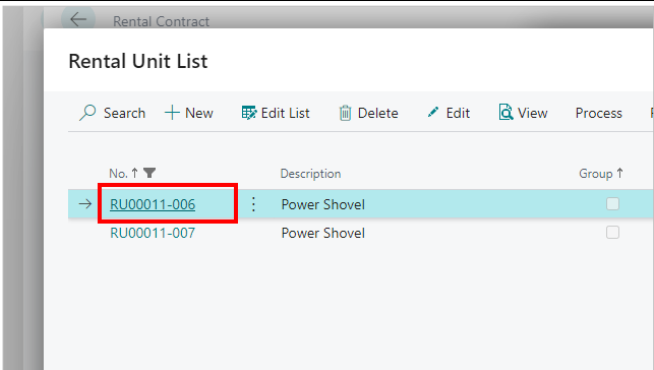
Click on the cell **New Rental Unit**



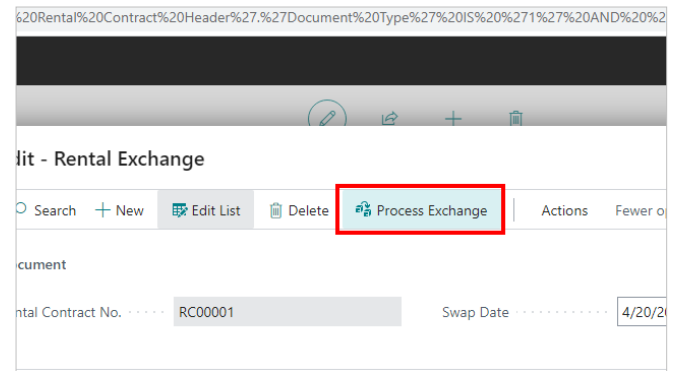
Click on the lookup button in the cell **New Rental Unit**



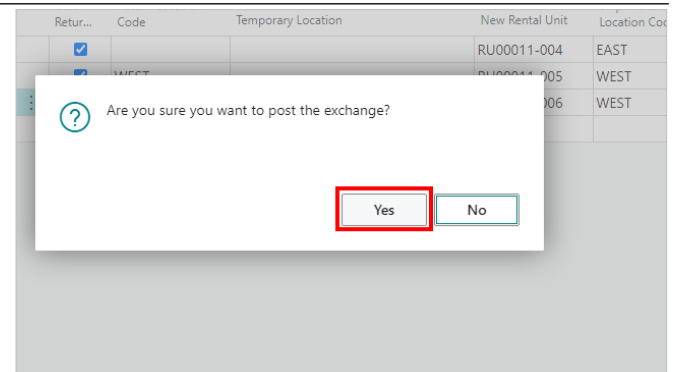
Click on the link in cell **No.** with the value **RU00011-006**



Click on the navigation menu item **Process Exchange**



Click on the button **Yes**



Review of the Rental Lines After the Exchange

On the Rental Contract, the Posting Date will be updated to the Swap Date specified in the Rental Exchange page.

A Posted Rental Return document was automatically created, which includes both Rental Units returned during the exchange.

A Posted Rental Delivery document was automatically created, which includes the shipment of the 3 replacement units.

The following picture displays the relevant Rental Lines fields after the exchange was processed.

Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Replaced By	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code
→ RU00011	4/12/2021		6/11/2021	4/12/2021	6/11/2021		0	0	0	0	
RU00011-001	4/12/2021		4/20/2021	4/12/2021	4/12/2021	RU00011-004	0	0	0	1	EAST
RU00011-004	4/21/2021		6/11/2021	4/12/2021	6/11/2021		0	1	0	0	
RU00011-002	4/12/2021		4/20/2021	4/12/2021	4/12/2021	RU00011-005	0	0	0	1	WEST
RU00011-005	4/21/2021		6/11/2021	4/12/2021	6/11/2021		0	1	0	0	
RU00011-003	4/12/2021		6/11/2021	4/12/2021	4/12/2021	RU00011-006	0	1	0	0	
RU00011-006	4/21/2021		6/11/2021	4/12/2021	6/11/2021		0	1	0	0	

Review of the original Rental Unit lines included in the exchange:

- The Rental Return Date was updated to the Swap Date of 4/20/2021 for the units that were returned.
- The Rental Return Date on the original unit line that was not returned is not updated as the unit was not returned.
- The Rental Billing End Date updated to be the same as the Rental Billing Start Date as no invoice had been posted before processing the rental exchange. Therefore, no subsequent invoicing will include these units.



- The Replace By field displays the Rental Unit No. of the replacement unit on each of the original rental unit lines.
- For the units that had the Original Unit Returned field checked, the rental units were automatically returned during the exchange, which in turn populated the Qty. Returned field on the lines.
- For the unit not returned during the exchange, the Qty. on Rent will still be populated.
- The Return Location Code was populated on each of the returned units. RU00011-001 with the location it was shipped from as the Return Location Code field was not populated on the Rental Exchange page. RU00011-002 with WEST, the Return Location Code specified on the exchange page.
- A Rental Ledger Entry was created on each of the units returned during the exchange process.

Review of the replacement units rental lines created by the exchange process:

- The Rental Start Date was set to April 21, the day following the Rental Return Date set on the original rental unit that was returned.
- The Rental Return Date is set to June 11, which was the return date on the returned unit lines before the exchange was processed.
- The Rental Billing Start Date was set to April 12 as no invoice was posted that included the units that were returned. Therefore, when the invoice is posted on May 11 for the first rental period the invoice will be invoicing the replacement units.
- The Rental Billing End Date was set to be the same as the Rental Return Date on the line.
- The Qty. on Rent is populated as the replacement units were automatically shipped.
- A Rental Ledger Entry was created on each of the replacement units for the rental of the units.
- Rental Amount Lines were created on each of the replacement units for the dates, from April 12 through to June 11.

On the original Rental Units there will not be any Rental Amount lines as the exchange occurred before any invoice was posted on the contract.

NOTE:

Had the exchange taken place in the second rental period after the first rental period was invoiced. The Rental Amount lines on the original Rental Unit would contain the records that were invoiced.

3.18.3.2.2.1.**Returning the Rental Unit Not Returned During the Exchange**

The following demonstrates the returning of the Rental Unit not returned during the exchange process 2 days after the exchange occurred.

Click on the cell **Rental Unit No.** with the value **RU00011-003**

Select the rental line which contains the Rental Unit that was not returned during the exchange process.

Rental Unit No.	Standard Text Code	Description	Rental Terms Code	Rental Unit No.
→ RU00011	:	Power Shovel Group	MONTH-PEND	
RU00011-001	:	Power Shovel	MONTH-PEND	
RU00011-004	:	Power Shovel	MONTH-PEND	
RU00011-002	:	Power Shovel	MONTH-PEND	
RU00011-005	:	Power Shovel	MONTH-PEND	
RU00011-003	:	Power Shovel	MONTH-PEND	
RU00011-006	:	Power Shovel	MONTH-PEND	

Sales Lines | Manage | Line | Fewer options



ODT Rentals Online Help

Click on the link in cell **Rental Return Date** with the value **6/11/2021**

Type or look-up and select the date on which the Rental Unit is being returned.

Rental Terms Code Alt2	Rental Start Date	Rental Billing Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Replaced E
	4/12/2021	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
	4/12/2021	4/12/2021		4/20/2021	4/12/2021	4/12/2021	RU00011-
	4/21/2021	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
	4/12/2021	4/12/2021		4/20/2021	4/12/2021	4/12/2021	RU00011-
	4/21/2021	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
	4/12/2021	4/12/2021		6/11/2021	4/12/2021	4/12/2021	RU00011-
	4/21/2021	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
	4/12/2021	4/12/2021		6/11/2021	4/12/2021	4/12/2021	RU00011-
	4/21/2021	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
					Open the date picker for Rental Return Date		

Click on a date in the calendar

21	4/12/2021		6/11/2021	4/12/2021	6/11/2021	RU00011-005	4/12/2021																																										
21	4/12/2021		6/11/2021	4/12/2021	6/11/2021	RU00011-006	4/12/2021																																										
21	4/12/2021						6/11/2021																																										
<div>◀ April 2021 ▶</div> <table><tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr><tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr><tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr><tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr><tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr><tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td></tr></table> <div>Go to today Done</div>								Su	Mo	Tu	We	Th	Fr	Sa					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	
Su	Mo	Tu	We	Th	Fr	Sa																																											
				1	2	3																																											
4	5	6	7	8	9	10																																											
11	12	13	14	15	16	17																																											
18	19	20	21	22	23	24																																											
25	26	27	28	29	30																																												
Line	Tax Group Code				Unit %	Currency Code	Qty. to S																																										
00	*		0.00	0.00	0																																												

Click on the cell **Qty. to Return** with the value **0**

Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Line Disco... %	Return Day Billable
0.00		SUPPLIES	0	0	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	0	0	1	EAST	2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	0	0	1	WEST	2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>

Enter the text **1**.

Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Line Disco... %	Return Day Billable
0.00		SUPPLIES	0	0	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	0	0	1	EAST	2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	0	0	1	WEST	2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>
0.00		SUPPLIES	0	1	0	0		2	<input checked="" type="checkbox"/>

NOTE:When the Rental Term on the line has an Invoicing Type of Start or Periodic Start and an invoice had been posted, then when entering the Return Date when the unit is being returned, and select yes to the confirmation message, "There are invoiced rental amounts later than 02/08/22. Are you sure you want to set the return date to 02/08/22? Yes/No", a credit memo will not be created.



Click on the link **Open the date picker for Posting Date**

Select the date the return is to be posted on.

The screenshot shows the 'General' tab of a 'Rental Contract' form. The 'Posting Date' field is set to '4/20/2021' and has a calendar icon to its right, which is highlighted with a red box. Other fields include 'Sell-to Customer No.' (Trey Research), 'Quote No.', 'Order Date' (4/12/2021), 'Document Date' (4/20/2021), and 'External Document No.'.

Click on a date in the calendar

The screenshot shows a calendar for April 2021. The date '4/22/2021' is highlighted with a red box. The calendar is part of a larger form that includes fields for 'Quote No.', 'Posting Date', 'Order Date', 'Document Date', and 'External Document No.'.

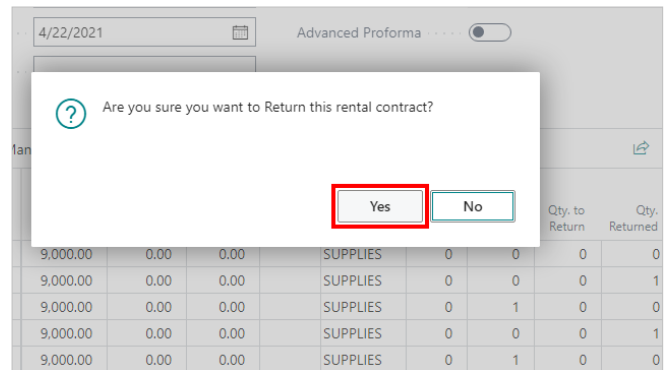
Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract' form with the 'Rental' tab highlighted by a red box. The form displays the title 'Rental Contract · RC00001' and the 'General' tab. The 'Posting Date' field is set to '4/20/2021'.

Click on the navigation menu item **Return Rentals**

The screenshot shows the 'Rental Contract' form with the 'Return Rentals' option highlighted by a red box. The form displays the title 'Rental Contract · RC00001' and the 'Return Rentals' option. The 'Posting Date' field is set to '4/22/2021'.

Click on the button **Yes**

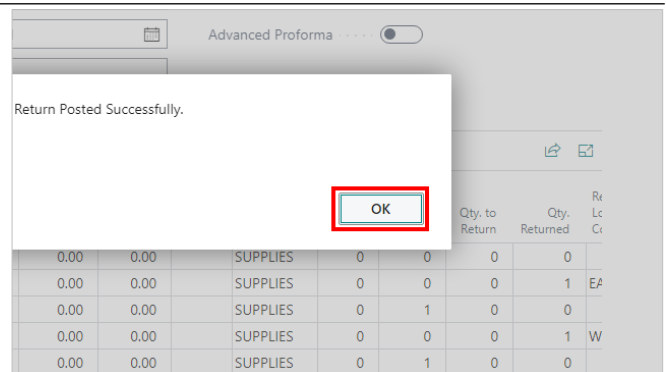


Are you sure you want to Return this rental contract?

Yes No

	9,000.00	0.00	0.00		0	0	0	0
SUPPLIES					0	0	0	0
SUPPLIES					0	0	0	1
SUPPLIES					0	1	0	0
SUPPLIES					0	0	0	1
SUPPLIES					0	1	0	0

Click on the button **OK**



Return Posted Successfully.

OK

	0.00	0.00		0	0	0	0	0
SUPPLIES				0	0	0	0	0
SUPPLIES				0	0	0	1	EA
SUPPLIES				0	1	0	0	0
SUPPLIES				0	0	0	1	W
SUPPLIES				0	1	0	0	0

3.18.3.2.3.

Processing a Rental Exchange When an Invoice is Posted

In this example, the Rental Term on the contract rental lines is a monthly periodic start term for billing in advance and there has been an invoice posted on the contract.

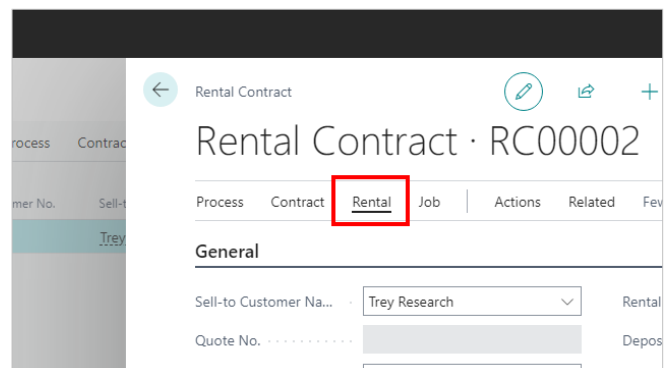
The exchange will be processed within the dates that were already invoiced.

The contract is for 2 rental periods covering April 12 through June 11.

The Rental Units on the contract have been shipped and an invoice posted on April 12.

The Rental Exchange will be processed on April 30 for all 3 units as noted in the Overview chapter.

Click on the navigation menu item popup **Rental**



Rental Contract · RC00002

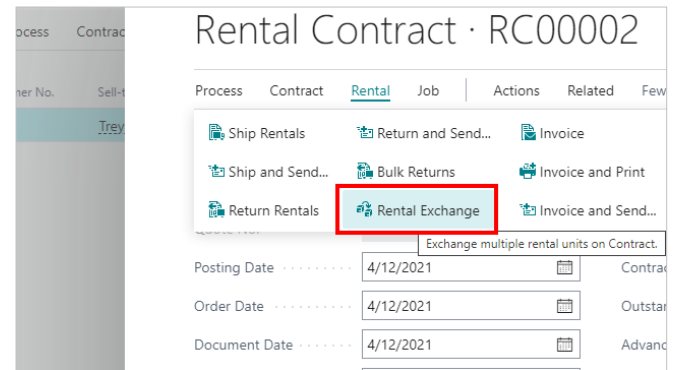
Process Contract **Rental** Job Actions Related Fev

General

Sell-to Customer Na... Trey Research Rental

Quote No. Depos

Click on the navigation menu item **Rental Exchange**



Rental Contract · RC00002

Process Contract **Rental** Job Actions Related Fewer options

Ship Rentals Return and Send... Invoice

Ship and Send... Bulk Returns Invoice and Print

Return Rentals **Rental Exchange** Invoice and Send...

Exchange multiple rental units on Contract.

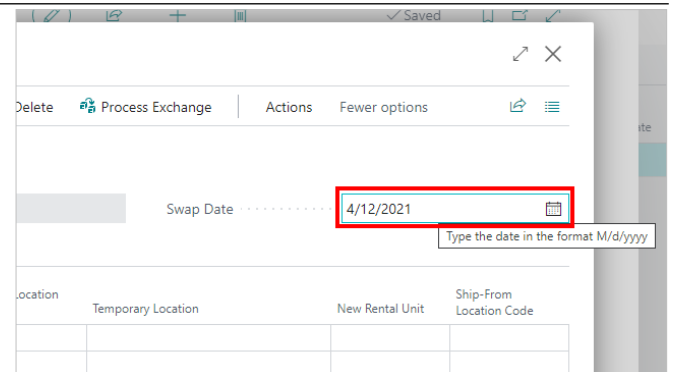
Posting Date 4/12/2021 Contract

Order Date 4/12/2021 Outstar

Document Date 4/12/2021 Advanc

Click on the field **Swap Date**

Enter or look-up and select the date on which the exchange is occurring.

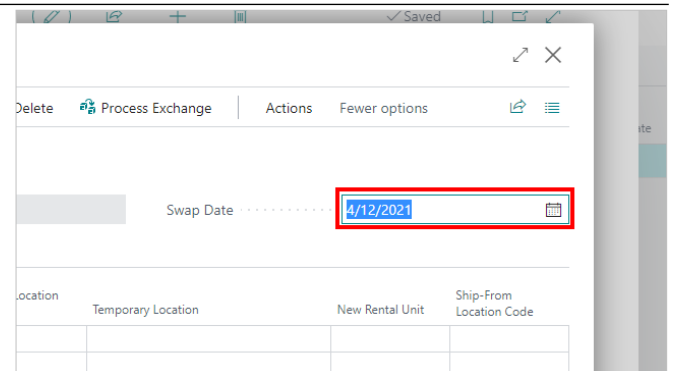


Swap Date 4/12/2021

Type the date in the format M/d/yyyy

Location	Temporary Location	New Rental Unit	Ship-From Location Code

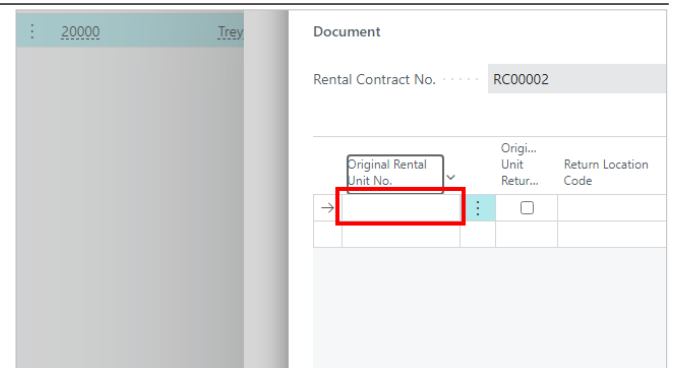
Enter the text **04302021**. Press the **TAB** key.



Swap Date 4/12/2021

Location	Temporary Location	New Rental Unit	Ship-From Location Code

Click on the cell **Original Rental Unit No.**



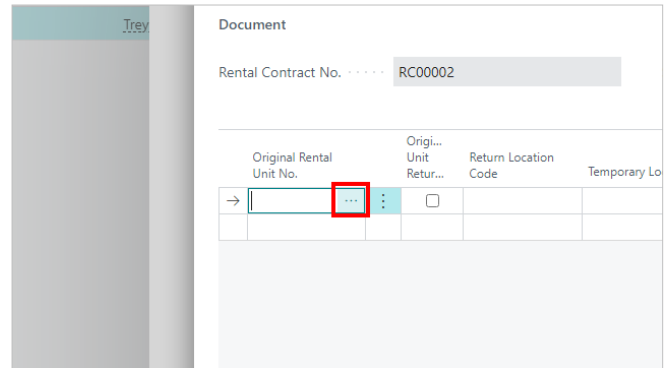
Document

Rental Contract No. RC00002

Original Rental Unit No.	Original Unit Return	Return Location Code

ODT Rentals Online Help

Click on the lookup button in the cell **Original Rental Unit No.**



Document

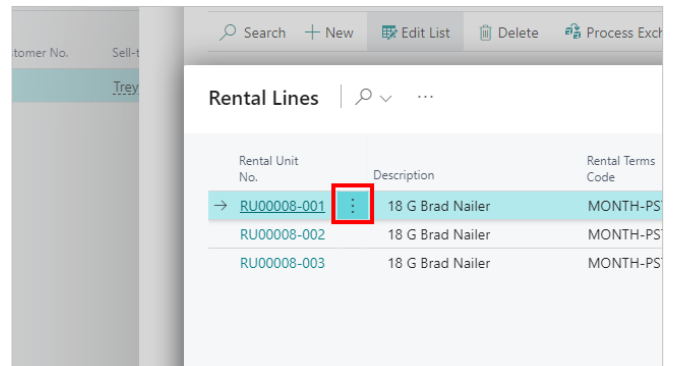
Rental Contract No. RC00002

Original Rental Unit No.	Original Unit Return...	Return Location Code	Temporary Lo
→ []	[]		

When more than one Rental Unit is going to be exchanged, then the multiple units to be exchanged can be selected:

- By using the Select More and clicking on the units to include
- By select individual lines by clicking on one record then holding down the Ctrl key and click on the other lines with the units to be exchanged
- Or if there is a range of unit, then click on one record, hold down the Shift key and select the end record to be included
- As all units displayed in the list are being exchanged as in this example, then all the displayed lines can be selected by checking the box at the top left.

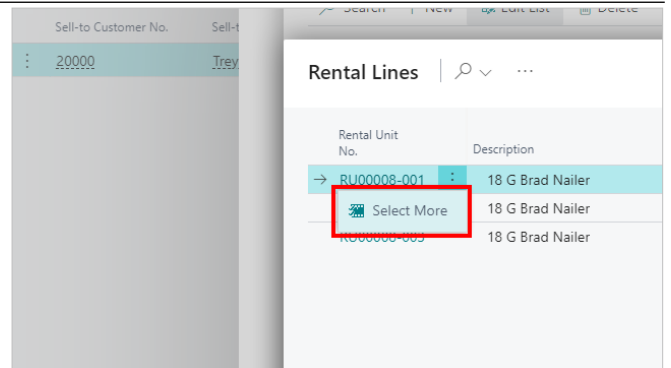
Click on the row menu button



Rental Lines | 🔍 ⌵ ...

Rental Unit No.	Description	Rental Terms Code
→ RU00008-001	18 G Brad Nailer	MONTH-PS
RU00008-002	18 G Brad Nailer	MONTH-PS
RU00008-003	18 G Brad Nailer	MONTH-PS

Click on the menu item **Select More**



Rental Lines | 🔍 ⌵ ...

Rental Unit No.	Description
→ RU00008-001	18 G Brad Nailer
Select More	18 G Brad Nailer
RU00008-002	18 G Brad Nailer



Click on the column header **Selected**

Selected	Rental Unit No.	Description
<input checked="" type="checkbox"/>	RU00008-001	18 G Brad Nailer
<input type="checkbox"/>	RU00008-002	18 G Brad Nailer
<input type="checkbox"/>	RU00008-003	18 G Brad Nailer

Click on the button **OK**

Click on **Original Unit Returned**

Check the Original Unit Returned box to indicate that the original unit is to be returned when the exchange is processed.

Original Rental Unit No.	Original Unit Returned	Return Location Code	Temporary Location
RU00008-001	<input type="checkbox"/>		
RU00008-002	<input type="checkbox"/>		
→ RU00008-003	<input type="checkbox"/>		

Click on the cell **New Rental Unit**

Location	Temporary Location	New Rental Unit	Ship-From Location Code



ODT Rentals Online Help

Click on the lookup button in the cell **New Rental Unit**

Swap Date 4/30/2021

Temporary Location	New Rental Unit	Ship-From Location Code

Review or update the value for New Rental Unit

Click on the link in cell **No.** with the value **RU00008-004**

Sell-to Customer No. 20000 Sell-to Trey

Rental Unit List

Search + New Edit List Delete

No. ↑	Description
→ RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
SUB 18 G B...	Sub Contracted 18 G Brad Nailer

Click on **Original Unit Returned**

Rental Contract No. RC00002 Swap Date

Original Rental Unit No.	Original Unit Returned	Return Location Code	Temporary Location
→ RU00008-001	<input checked="" type="checkbox"/>		
RU00008-002	<input type="checkbox"/>		
RU00008-003	<input type="checkbox"/>		

Click on the cell **Return Location Code**

Rental Contract No. RC00002 Swap Date

Original Rental Unit No.	Original Unit Returned	Return Location Code	Temporary Location
RU00008-001	<input checked="" type="checkbox"/>		
→ RU00008-002	<input checked="" type="checkbox"/>		
RU00008-003	<input type="checkbox"/>		



ODT Rentals Online Help

Click on the lookup button in the cell **Return Location Code**

Rental Contract No. RC00002 Swap Date 4/30/21

Original Rental Unit No.	Original Unit Return...	Return Location Code	Temporary Location	New Rental Unit
RU00008-001	<input checked="" type="checkbox"/>			RU00008-001
→ RU00008-002	<input checked="" type="checkbox"/>	<input type="text" value=""/>		
RU00008-003	<input type="checkbox"/>			

1M(8D) Review or update the value for Return Location Code.

154.00

EAST East Warehouse

RENTRESERV Inventory Items Rental Reserved or

SOUTH South Warehouse

Click on the link in cell **Code** with the value **WEST**

RU00008-003 ☐

1M(8D)

154.00

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New Select record "WEST"

Click on the cell **New Rental Unit**

Swap Date 4/30/2021

Location	Temporary Location	New Rental Unit	Ship-From Location Code
		RU00008-004	EAST
<input type="text" value=""/>			

Click on the lookup button in the cell **New Rental Unit**

Swap Date 4/30/2021

Temporary Location	New Rental Unit	Ship-From Location Code
	RU00008-004	EAST
	<input type="text" value=""/>	
	PSPRO-MONTH	



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00008-005**

Sell-to Customer No.		Sell-to
20000		Trey

Rental Unit List	
Search	+ New Edit List Delete
No. ↑	Description
→ RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
SUB 18 G B...	Sub Contracted 18 G Brad Nail

Click on the cell **New Rental Unit**

Swap Date		4/30/2021
-----------	--	-----------

Location	Temporary Location	New Rental Unit	Ship-From Location Code
		RU00008-004	EAST
		RU00008-005	WEST

Click on the lookup button in the cell **New Rental Unit**

Swap Date		4/30/2021
-----------	--	-----------

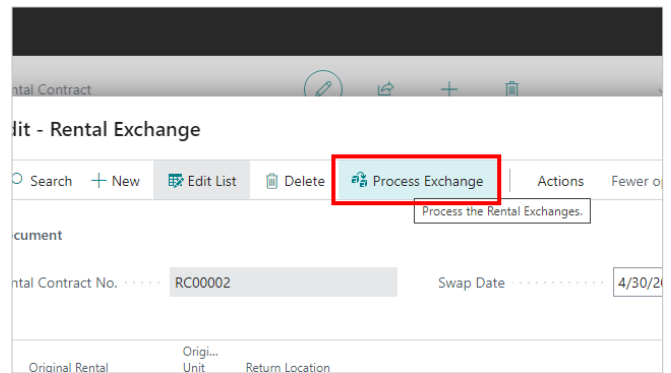
Temporary Location	New Rental Unit	Ship-From Location Code
	RU00008-004	EAST
	RU00008-005	WEST

Click on the link in cell **No.** with the value **RU00008-006**

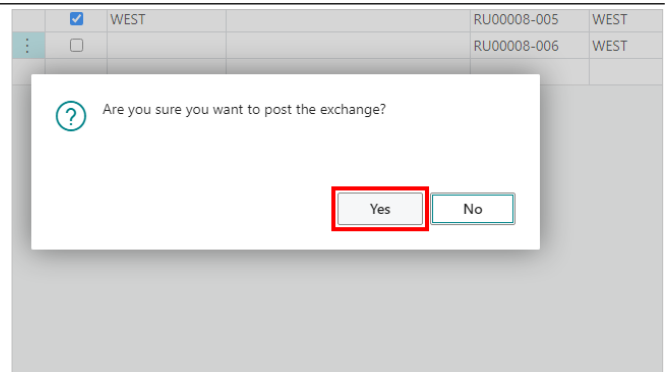
Sell-to Customer No.		Sell-to
20000		Trey

Rental Unit List	
Search	+ New Edit List Delete
No. ↑	Description
→ RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
SUB 18 G B...	Sub Contracted 18 G Brad Nail

Click on the navigation menu item **Process Exchange**



Click on the button **Yes**



Review of the Rental Contract After the Exchange

On the Rental Contract, the Posting Date will be updated to the Swap Date specified in the Rental Exchange page.

A Posted Rental Return document was automatically created, which includes both Rental Units returned during the exchange.

A Posted Rental Delivery document was automatically created, which includes the shipment of the 3 replacement units.

Review of the original Rental Unit lines included in the exchange:

- The Rental Return Date was updated to the Swap Date of 4/30/2021 for the units that were returned.
- The Rental Return Date on the original unit line that was not returned is not updated as the unit was not returned.
- The Rental Billing End Date updated to be the last date which was included in the invoice that had been posted before processing the rental exchange. This date is from the Ending Date-Time, 5/11/2021 11:59 PM, in the Rental Amount Line which was invoiced.
- The Replace By field displays the Rental Unit No. of the replacement unit on each of the original rental unit lines.
- For the units that had the Original Unit Returned field checked, the rental units were automatically returned during the exchange, which in turn populated the Qty. Returned field on the lines.
- For the unit not returned during the exchange, the Qty. on Rent will still be populated.
- The Return Location Code was populated on each of the returned units. RU00008-001 with the location it was shipped from as the Return Location Code field was not populated on the Rental Exchange page. RU00008-002 with WEST, the Return Location Code specified on the exchange page.
- A Rental Ledger Entry was created on each of the units returned during the exchange process.

Review of the replacement units' rental lines created by the exchange process:

- The Rental Start Date was set to May 1, the day following the Swap Date set on the Rental Exchange page.

- The Rental Return Date is set to June 11, which was the return date on the returned unit lines before the exchange was processed.
- The Rental Billing Start Date was set to May 12 as the invoice was posted for April 12 to May 11 that included the units that were returned. Therefore, when the next invoice is posted on May 12 for the next rental period the invoice will be invoicing the replacement units.
- The Rental Billing End Date was set to be the same as the Rental Return Date on the line.
- The Qty. on Rent is populated as the replacement units were automatically shipped.
- A Rental Ledger Entry was created on each of the replacement units for the rental of the units.
- Rental Amount Lines were created on each of the replacement units for the dates, from May 12 through to June 11.

For the steps to return the rental unit not returned during the exchange see the chapter, Returning the Rental Unit Not Returned During the Exchange, in the first example.

3.18.3.3. How to Exchange Units from Different Groups

3.18.3.3.1. Overview

The Rental Exchange from different Rental Groups provides the ability to select Rental Units from a Substitution list.

In order to select substitute Rental Units, the setup of Substitutions on the Rental Group Unit cards is mandatory.

To learn about setting up substitutes, please review the chapter, How to Setup Substitutes.

If exchange an original unit or units that are not within a Rental Package, then the Rental Groups and the selected Rental Units will populate the Rental Lines starting on first blank line.

If the selected substitute Rental Unit is assigned to a Rental Group that is currently on the Rental Lines, then a new group line and child line are created after all groups and units currently on the Rental Lines.

If exchange an original unit that is within a Rental Package, then the new Rental Group and selected Rental Unit lines are inserted into the package after the last package component line.

When exchanging a Rental Unit that is not in a Price Allocation Rental Package and select a substitute Rental Unit where either the group it is assigned to or the unit itself has a Rental Price card for the Rental Term on the original Rental Units' Rental Line, then the following occurs.

- If the Rental Unit Price is different from the Rental Unit Price on the original Rental Unit line, then users will be prompted to either keep the existing price or accept the substitutes price.
- If the Rental Unit Price is the same, then no message will occur.

When exchanging a Rental Unit within a Price Allocation Rental Package (Use Roll-up Pricing is not enabled) and select a Substitute Rental Unit, then the price is automatically copied to new Rental Unit line from the initial unit line.

NOTE:

If initial unit pricing included Damage Waiver or Additional Fee billing and the substitute Rental Group or Unit does not have these setup on a Rental Price card or does not have a Rental Price card for the Rental Term then these fees will not be billed on the new Rental Unit.

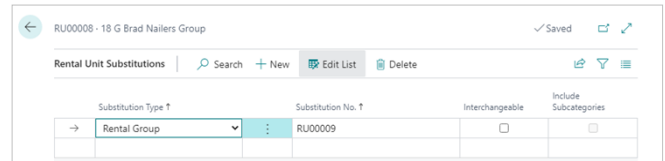
3.18.3.3.2. Rental Unit Substitutes

From the Rental Group Unit cards, a list of possible substitutes must be created to be able to exchange Rental

Units from a different rental group.

The following displays an example of the Rental Unit Substitutions list.

Rental Unit Substitutions



3.18.3.3.2.1.

Rental Unit Substitution List Fields

The following provides an overview of each of the fields on the Rental Unit Substitutions list.

Substitution Type: Contains the options of Rental Unit, Rental Group and Rental Category. The option Rental Unit is displayed by default. When selecting Rental Group this specifies that the substitution list in the Rental Exchange will contain the Rental Units assigned to the selected Rental Group. When selecting Rental Category this specifies that the substitution list in the Rental Exchange will contain the Rental Units that have the selected Rental Category.

IMPORTANT NOTE:

The Substitution Type of Rental Unit is not to be selected for the Rental Exchange feature. This type will be used in the next phase of the Resolve Shortages feature to include the substituting a rental unit for resolving shortages.

Substitution No.: Select the Rental Group or Rental Category based on the Substitution Type on the line.

- When the Rental Group Substitution Type is selected, then the Substitute No. field look-up will be filtered to display all the Rental Groups for selecting a Rental Group.
- When Rental Category is selected, then the Substitution No. field look-up will be filtered to display all Rental Categories for selecting a category.

Interchangeable: This field provides the ability to specify that on the selected substitute Rental Group a substitution record of Rental Group is to be created with the Substitution No. set as the current Rental Group No., and the interchangeable field will be checked.

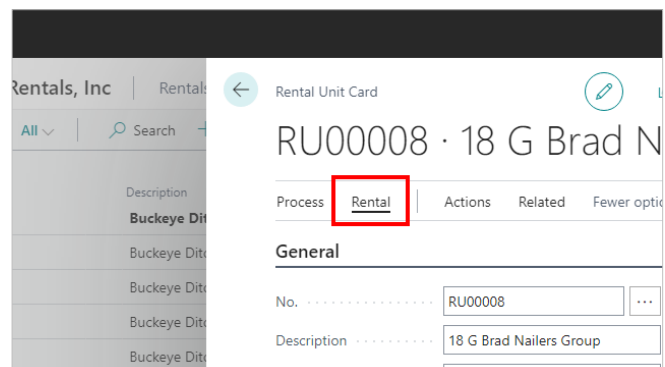
Include Subcategories: Provides the ability to specify that Rental Units that have a subcategory of the selected Rental Category are to be included in the list of substitutes for selection when processing an exchange.

3.18.3.3.2.2.

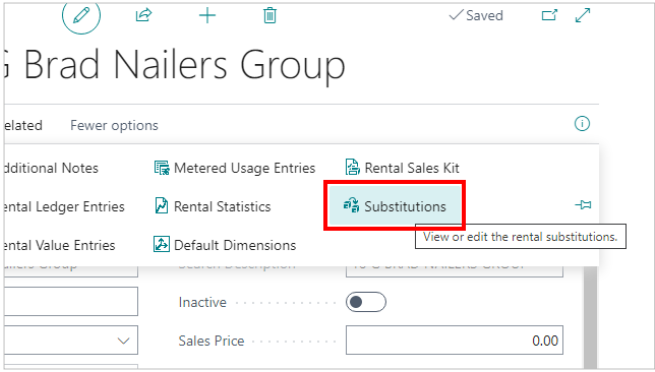
How to Setup Substitutes

The following demonstrates the setting up of a Rental Group and Rental Category substitute from a Rental Group card.

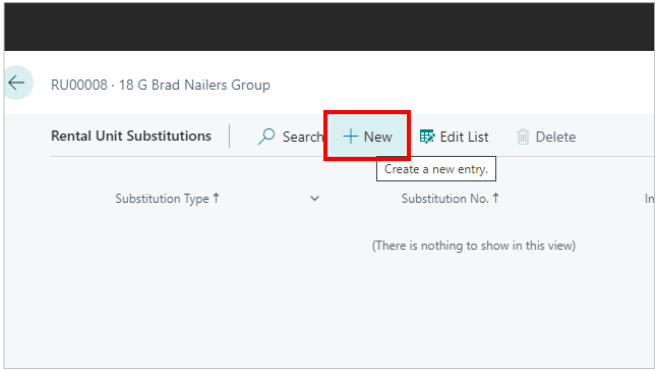
Click on the navigation menu item popup **Rental**



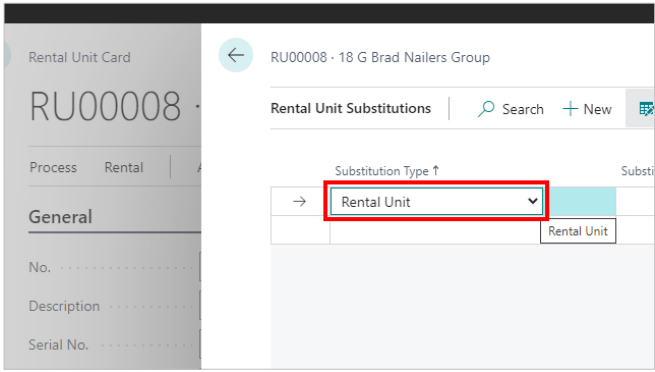
Click on the navigation menu item **Substitutions**



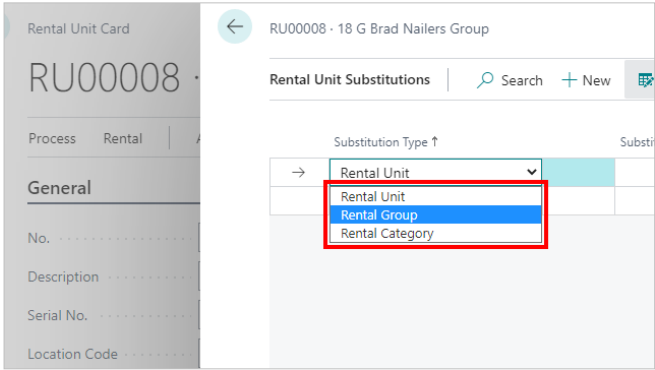
Click on the navigation menu item **New**



Click on the cell **Substitution Type** with the value **Rental Unit**



Click on the item **Rental Group** in the list





Click on the cell **Substitution No.**

00008 - 18 G Brad Nailers Group

Rental Unit Substitutions | Search + New Edit List Delete

Substitution Type ↑	Substitution No. ↑	Interchangeable
→ Rental Group		<input type="checkbox"/>

Click on the link in cell **No.** with the value **RU00009**

Substitution Type ↑	Substitution No. ↑	Interchangeable
Rental Group		<input type="checkbox"/>

No. ↑	Description
RU00001	Buckeye Ditcher Group
RU00008	18 G Brad Nailers Group
RU00009	16 G Brad Nailers Group
RU00010	Select record "RU00009" Air Nailer Group
RU00011	Power Shovel Group

Click on **Interchangeable**

As the field is being checked, on the Rental Group RU00009 a Rental Unit Substitution record will be created with Substitution Type set to Rental Group, Substitution No. set to RU00008 and the Interchangeable field will be checked.

Not saved

ch + New Edit List Delete

Substitution No. ↑	Interchangeable	Include Subcategories
RU00009	<input type="checkbox"/>	<input type="checkbox"/>

Click on the cell **Substitution Type**

Rental Unit Card

RU00008

Process Rental

General

No.

Description

Serial No.

Location Code

← RU00008 - 18 G Brad Nailers Group

Rental Unit Substitutions | Search + New Edit List

Substitution Type ↑	Substitution No. ↑
→ Rental Group	RU00008



Click on the cell **Substitution Type** with the value **Rental Unit**

Substitution Type ↑	Substitution No. ↑	Interchangeable
Rental Group	RU00008	
→ Rental Unit	RU00009	

Click on the item **Rental Category** in the list

Substitution Type ↑	Substitution No. ↑	Interchangeable
Rental Group	RU00008	
→ Rental Unit	RU00009	

Click on the cell **Substitution No.**

Substitution Type ↑	Substitution No. ↑	Interchangeable
Rental Group	RU00008	
→ Rental Unit	RU00009	

Click on the link in cell **Code** with the value **BRAD NAILERS**

All Rental Units with a Rental Category of BRAD NAILERS will be included in the Rental Exchange Substitutions list.

Code	Description
TOOLS	Tools
NAILERS	Nailers
BRAD NAILERS	Brad Nailers
FRAMING NAILERS	Select record "BRAD NAILERS" Nailers

The Categories of BRAD NAILERS and FRAMING NAILERS are sub-categories of the NAILERS category.

If the Rental Category of NAILERS had been selected and the Include Subcategories was checked, then in the Rental Exchange Substitutions list the Rental Units with the NAILERS Category or either of the sub-categories on the unit cards would be included in the list.

3.18.3.3.3.

How to Process a Rental Exchange using a Substitute

The following demonstrates the processing of a Rental Exchange when selecting a substitute unit from a different Rental Group which was setup as a substitute on the Rental Group the original unit is assigned to.



The substitute will be from the Rental Group substitute setup on the Rental Group the Rental Unit being exchanged is assigned to.

No Invoice has been posted, the exchange will occur 5 days after the Rental Units were shipped and the original unit will be returned in the exchange.

Click on the cell **Rental Unit No.** with the value **RU00008-005**

Rental Lines				Manage	Line	Functions
Rental Unit No.	Rental Quantity	Location Code	Bin Code			
→ RU00008	2					
RU00008-005	1	WEST				
RU00008-005	1	WEST				

Click on the navigation menu item popup **Rental**

Contracts - Open

Rental Contract

Rental Contract · RC00009

Process Contract **Rental** Job Actions Related Few

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Rental

Click on the navigation menu item **Rental Exchange**

Contracts - Open

Rental Contract

Rental Contract · RC00009

Process Contract **Rental** Job Actions Related Few

Ship Rentals Return and Send... Invoice

Ship and Send... Bulk Returns Invoice and Print

Return Rentals **Rental Exchange** Invoice and Send...

Exchange multiple rental units on Contract.

Posting Date 5/11/2022 Deposit

Order Date 4/11/2022 Contract

Document Date 5/11/2022 Outstar

Click on the field **Swap Date**

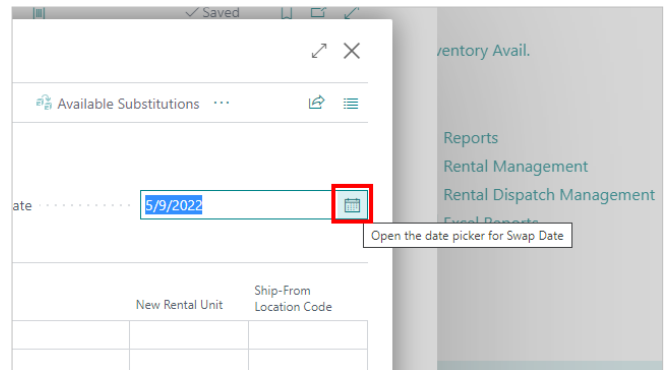
Delete Process Exchange Available Substitutions

Swap Date 5/9/2022

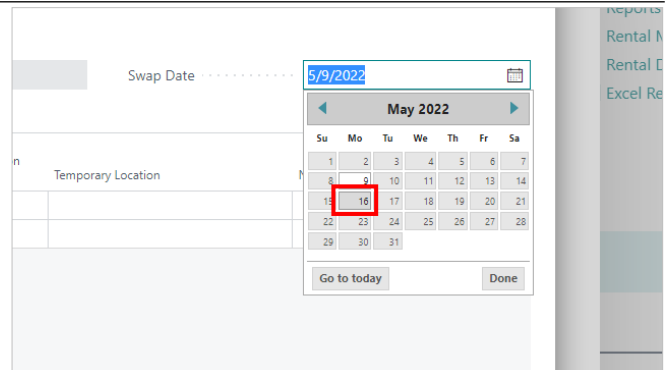
Type the date in the fo

Location	Temporary Location	New Rental Unit	Ship-From Location Code

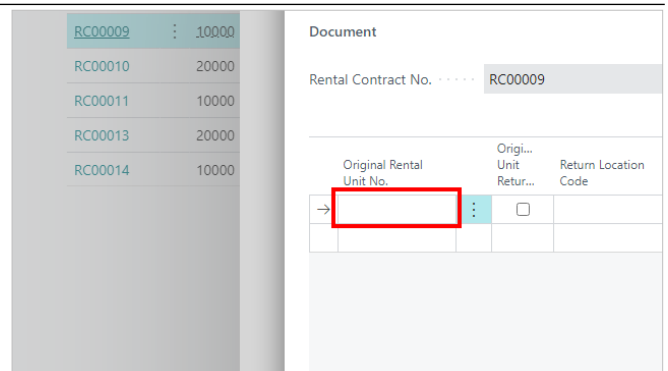
Click on the link **Open the date picker for Swap Date**



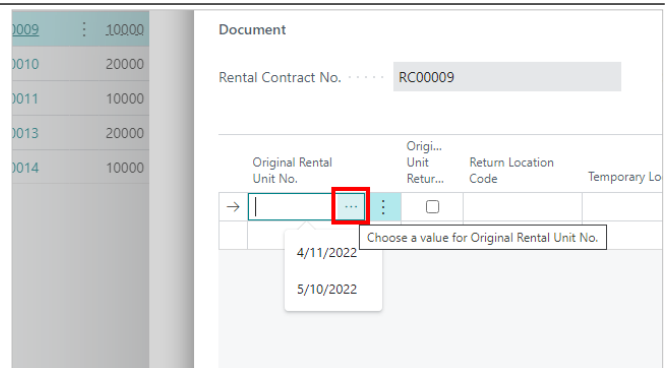
Click on a date in the calendar



Click on the cell **Original Rental Unit No.**



Click on the lookup button in the cell **Original Rental Unit No.**





ODT Rentals Online Help

Click on the Rental Unit No. that is to be exchanged

Rental Lines				
Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Location
→ RU00008-005	18 G Brad Nailer	MONTH-PEND	1	W
RU00008	Select record "RU00008-005" Nailer	MONTH-PEND	1	W

Click on **Original Unit Returned**

Document				
Rental Contract No.		RC00009		Swap Date
Original Rental Unit No.	Original Unit Returned	Return Location Code	Temporary Location	
→ RU00008-00				

Click on the navigation menu item **Available Substitutions**

Available Substitutions				
Edit List	Delete	Process Exchange	Available Substitutions	Select from a list of available rental units
RC00009		Swap Date	5/16/2022	
Original Unit	Return Location		Ship-From	

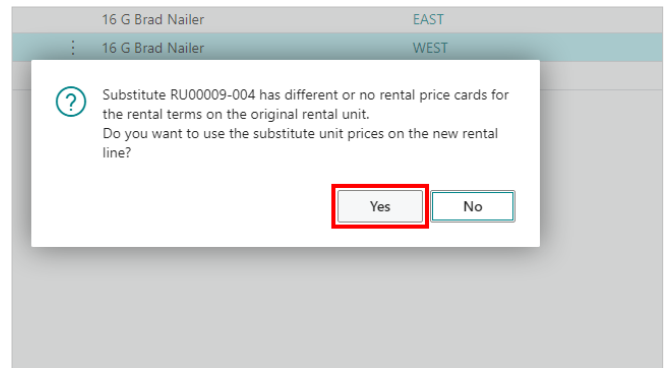
Click on the link in cell **Substitution No.** with the value **RU00009-004**

Substitution No.		Substitute Description	
RU00009-001		16 G Brad Nailer	
RU00009-002		16 G Brad Nailer	
RU00009-003		16 G Brad Nailer	
RU00009-004		16 G Brad Nailer	
RU00009	Select record "RU00009-004" Nailer		
→ SUB-RU00009		16 G Brad Nailer	

ODT Rentals Online Help

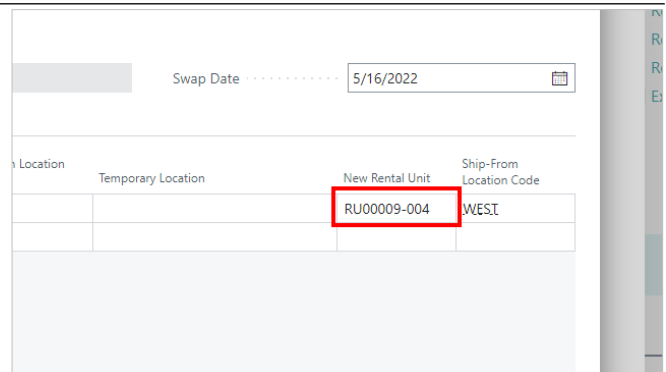
Click on the button **Yes**

If you want to have the Rental Price from the original unit to default to the new Rental Group and Rental Unit lines, then you would select No.

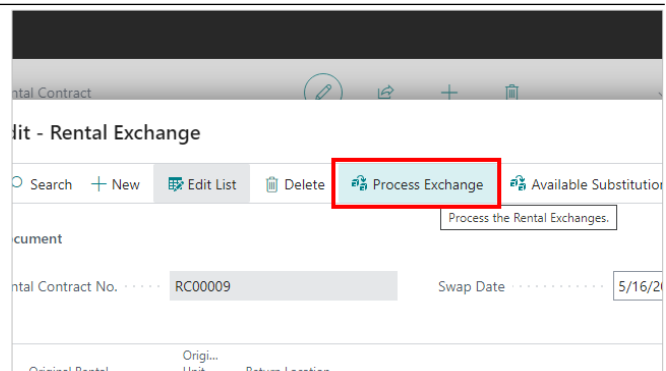


Click on the cell **New Rental Unit** with the value **RU00009-004**

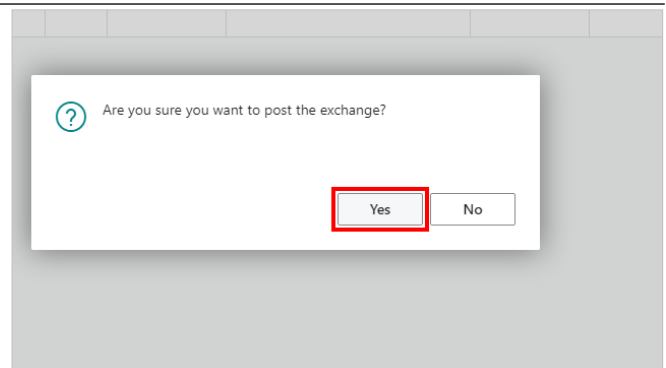
Note that the selected substitute Rental Unit populates the New Rental Unit field.



Click on the navigation menu item **Process Exchange**



Click on the button **Yes**



Click on the cell **Rental Unit No.** with the value **RU00009-004**

Note that the Rental Group the selected unit and the selected unit are populated on the Rental Lines.

Rental Unit No.	Stan... Text Code	Description
RU00008		18 G Brad Nailers G
→ RU00008-005	:	18 G Brad Nailer
RU00008-006	:	18 G Brad Nailer
RU00009		16 G Brad Nailers G
RU00009-004	:	16 G Brad Nailer
RU00009-004	:	

Sales Lines | Manage | Line | Fewer options

3.19.Bulk Returns

3.19.1. Bulk Returns Overview

3.19.1.1. Overview

Bulk Returns is a time saving feature that enables users to automatically populate the Qty. to Return field on the Rental Lines.

The Bulk Returns menu option is available on the Rental Contract, in the Rental menu option and on the Rental Lines, in the Functions menu option. The Bulk Returns is also available on the To Return Cue list, in the Rental menu option.

The Bulk Returns page contains two option fields that provide the ability to update the Rental Return Date on the rental lines, when the date the units are being returned is different from the Rental Return Date on the Rental Lines.

In addition, a different or temporary rental location can be specified when the Rental Units are to be returned to a different rental location. When the Rental Unit or units are linked to Items stored in Bins and are to be returned to a different Bin, the Bin Code that the Items are to be returned to can be specified.

ODT BULK RETURN

Option

Update Return Date

☐

Return Date

Location Code

Return Temporary Location

Return Bin Code

Schedule...

OK

Cancel



To learn about returning Rental Units to a different or temporary rental location, see ODT Rental Online Help, Processing Rentals, Returning Units to a Different or Temporary Location.

3.19.2. How to Process Bulk Returns on a Rental Contract

3.19.2.1. Overview

When the Bulk Returns is ran from the Rental menu option on a Rental Contract, then then all the units on the Rental Lines will automatically populates the Qty. to Return field on all units that are currently out on rent on the contract. Should the option to Update Return Date be enabled and a Return Date entered, then all rental lines with units still out on rent will have the Rental Return Date updated.

The Bulk Returns menu option on the Rental Lines provides the ability to select the individual rental lines which contain the Rental Units that are to have the Qty. to Return populated.

The posting of the return is to be ran after running the Bulk Returns feature. Prior to posting the Rental Returns, ensure that the Posting Date contains the date of return.

IMPORTANT NOTE:

Should an organization be tracking rentals based on date and time, where the time returned will impact the amount(s) to be invoiced to a customer, the Return Time is set to the time at which the Qty. to Return is populated.

Therefore, if the actual time the units were returned is different, then the Rental Return Time field will require that the actual return time is modified to reflect the actual time of return.

3.19.2.2. Processing Bulk Returns when all Units Returned on Rental Return Date

Profile - Sales Order Processor

Bulk Returns from the Rental Contracts can as well be processed from the Business Manager Profile using the steps provided here.

The following example demonstrates the using the Bulk Returns feature from an open contract that has been shipped, however, has not been invoiced.

In the example, all the units are being returned on the Rental Return Date on the rental lines.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00023 | WORK DATE: 5/15/2020

Rental Contract · RC00023

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/6/2020



Click on the navigation menu item **Bulk Returns**

When returning all of the units on a contract on the Rental Return Date that is on the rental lines, then no options need to be set on the ODT Bulk Returns page.

Click on the button **OK**

Click on the cell **Qty. to Return** with the value **1**

Notice that the Qty. to Return has been populated on all unit lines in the contract.

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return
0.00	0.00		SUPPLIES	0	0	0	
0.00	0.00		SUPPLIES	0	1	1	
0.00	0.00		SUPPLIES	0	1	1	
0.00	0.00		SUPPLIES	0	1	1	

Posting of the Rental Returns is completed using the following steps.

Click on the cell **Rental Return Date** with the value **5/5/2020**

Note the Rental Return Date as the units are being return on that date.

Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
			4/6/2020	5/5/2020	5,000.00	0.00	0.00
			4/6/2020	5/5/2020	5,000.00	0.00	0.00
			4/6/2020	5/5/2020	5,000.00	0.00	0.00
			4/6/2020	5/5/2020	5,000.00	0.00	0.00



ODT Rentals Online Help

Click on the field **Posting Date**

As the Posting Date is not the date the units are being returned, the date will need to be modified.

Adatum Corporation

4/6/2020

4/6/2020 Type the date in the format M/d/yyyy

4/6/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

4/6/2020

April 2020

Su Mo Tu We Th Fr Sa Next

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30

Functions

Click on a date in the calendar

Select the same date as the Rental Return Date noted.

er Name

Adatum Corporation

4/6/2020

May 2020

Su Mo Tu We Th Fr Sa

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Go to today Done

Manage Line Functions

No. Standard Text Code Description Code Rental Quantity Location Code Bin Cod



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00023

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00023

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

Post the return of the rental units on the rental lines. A posted re
turns.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

							Rental Unit Price	Alt1 Rental Unit Price
1	EAST			4/6/2020	5/5/2020		5,000.00	0.00
1	EAST			4/6/2020	5/5/2020		5,000.00	0.00
1	EAST			4/6/2020	5/5/2020		5,000.00	0.00

Click on the button **OK**

Outstanding Amount

Return Posted Successfully.

OK

							Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cu
				4/6/2020	5/5/2020		5,000.00	0.00	0.00	
				4/6/2020	5/5/2020		5,000.00	0.00	0.00	
				4/6/2020	5/5/2020		5,000.00	0.00	0.00	

3.19.2.3. Process Bulk Returns for all Units with a Different Return Date

Profile - Sales Order Processor

Bulk Returns from the Rental Contracts can as well be processed from the Business Manager Profile using the steps provided here.

The following example demonstrates the Bulk Returns feature from an open contract that has been shipped, however, has not been invoiced.

In the example, all the units are being return 2 days earlier than the Rental Return Date on the rental lines.

Click on the cell **Qty. on Rent** with the value **1**

Notice that all 3 units on the contract are out on rent.

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return
0.00	0.00		SUPPLIES	0	0	0	
0.00	0.00		SUPPLIES	0	1	0	
0.00	0.00		SUPPLIES	0	1	0	
0.00	0.00		SUPPLIES	0	1	0	

Click on the cell **Rental Return Date** with the value **6/4/2020**

Note that the Rental Return Date is June 4, however the units are being returned on June 2.

Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
			5/5/2020	6/4/2020	9,000.00	0.00	0.00	
			5/5/2020	6/4/2020	9,000.00	0.00	0.00	
			5/5/2020	6/4/2020	9,000.00	0.00	0.00	
			5/5/2020	6/4/2020	9,000.00	0.00	0.00	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00024

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the navigation menu item **Bulk Returns**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/8/2020

Rental Contract · RC00024

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals Return Rentals **Bulk Returns** Invoice Invoice and

Sell-to Customer Name Adatum Corporation

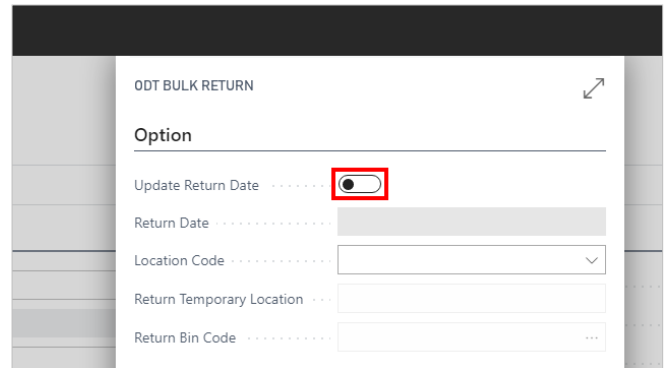
Quote No.

Posting Date 5/5/2020

ODT Rentals Online Help

Click on the toggle field Update Return Date

The Update Return Date option is used to specify whether the Rental Return Dates on all the rental lines for units out on rent are to be updated or not.



ODT BULK RETURN

Option

Update Return Date ☒

Return Date

Location Code

Return Temporary Location

Return Bin Code

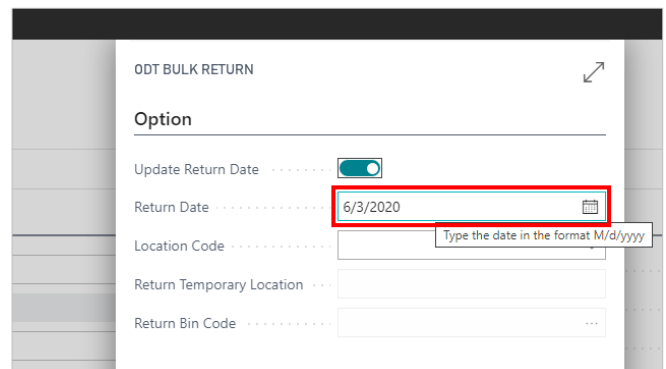
When this field is set to Yes, then the process will update the Rental Return Date field on all rental lines for units still out on rent.

Also when setting the option to Yes, the following option of Rental Return Date becomes editable and must be populated with the actual return date.

When the Update Return Date Option is set to No, then the Rental Return Date will remain as is on the rental lines.

Click on the field **Return Date**

By default the users' Work Date populates the field and will require the user to enter or look-up and select the actual date the units are returned on.



ODT BULK RETURN

Option

Update Return Date ☒

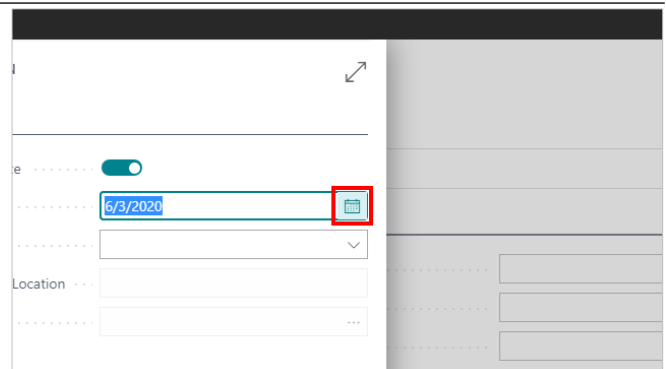
Return Date 6/3/2020

Location Code

Return Temporary Location

Return Bin Code

Click on the link **Open the date picker**



ODT BULK RETURN

Option

Update Return Date ☒

Return Date 6/3/2020

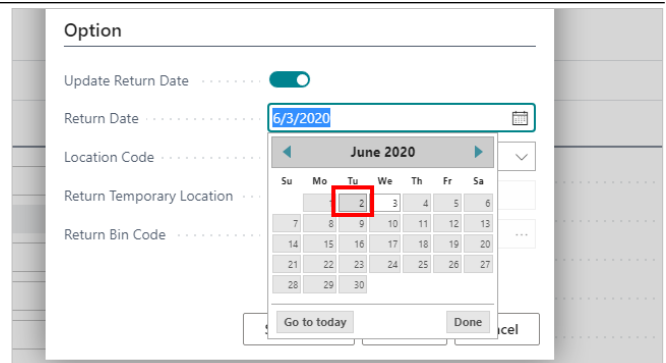
Location Code

Return Temporary Location

Return Bin Code

Click on a date in the calendar

June 2 is selected as that is the date the units are returned on.



Option

Update Return Date ☒

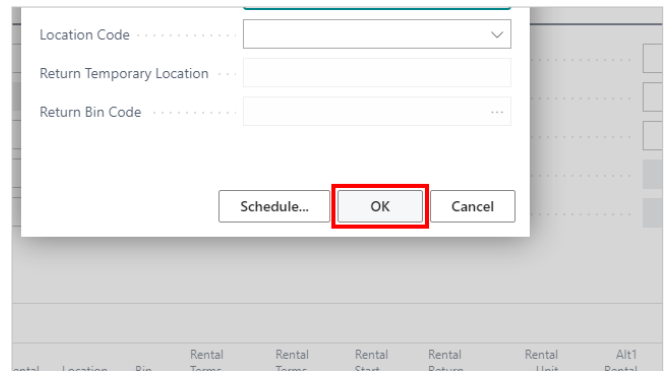
Return Date 6/3/2020

Location Code

Return Temporary Location

Return Bin Code

Click on the button **OK**



Notice that the Rental Return Date has been updated on all the rental lines, and that the Qty. to Return populated on all the lines.

Click on the cell **Rental Return Date** with the value **6/2/2020**

Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
			5/5/2020	6/2/2020	9,000.00	0.00	0.00	
			5/5/2020	6/2/2020	9,000.00	0.00	0.00	
			5/5/2020	6/2/2020	9,000.00	0.00	0.00	
			5/5/2020	6/2/2020	9,000.00	0.00	0.00	

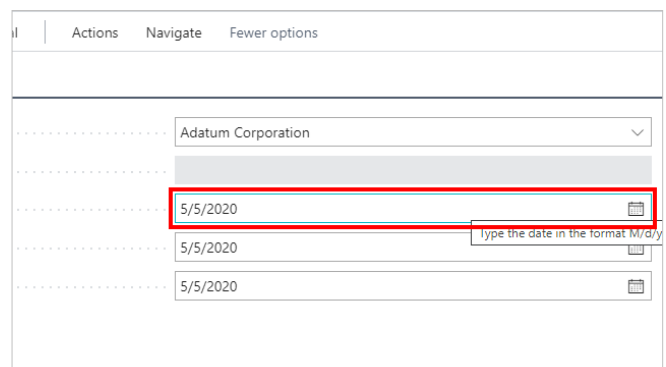
Click on the cell **Qty. to Return** with the value **1**

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. to Return
0.00	0.00		SUPPLIES	0	0	0	
0.00	0.00		SUPPLIES	0	1	1	
0.00	0.00		SUPPLIES	0	1	1	
0.00	0.00		SUPPLIES	0	1	1	

Posting of the Rental Returns is completed using the following steps.

Click on the field **Posting Date**

The Posting Date needs to have the date set to when the units were returned.





Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

Click on the link **Next**

Adatum Corporation

5/5/2020

May 2020

Su Mo Tu We Th Fr Sa

1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Functions

Click on a date in the calendar

er Name

Adatum Corporation

5/5/2020

June 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Go to today Done

Manage Line Functions

No. Standard Text Code Description Rental Terms Code Rental Quantity Location Code Bin Code

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/3/2020

Rental Contract · RC00024

Process Contract **Rental** Actions Navigate Fewer options

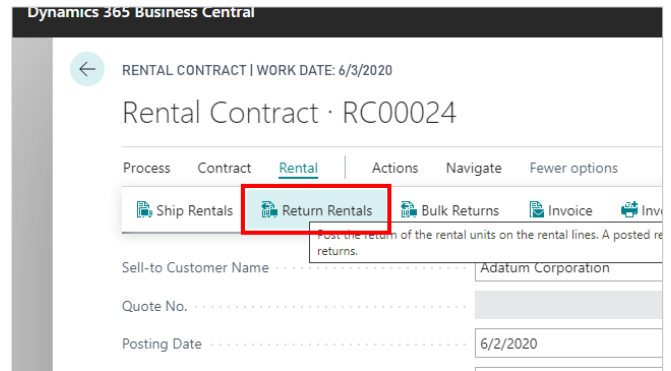
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/2/2020

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 6/3/2020

Rental Contract · RC00024

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Invo

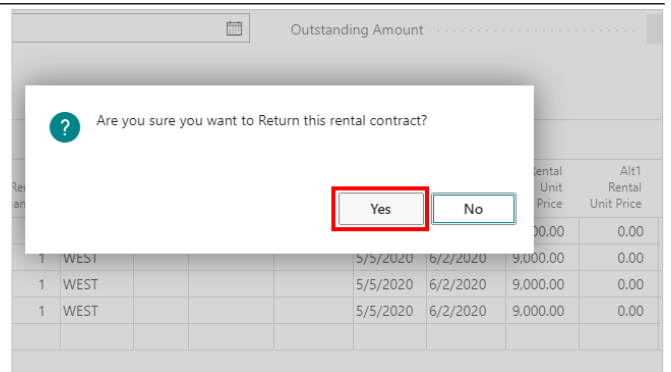
Post the return of the rental units on the rental lines. A posted re returns.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/2/2020

Click on the button **Yes**



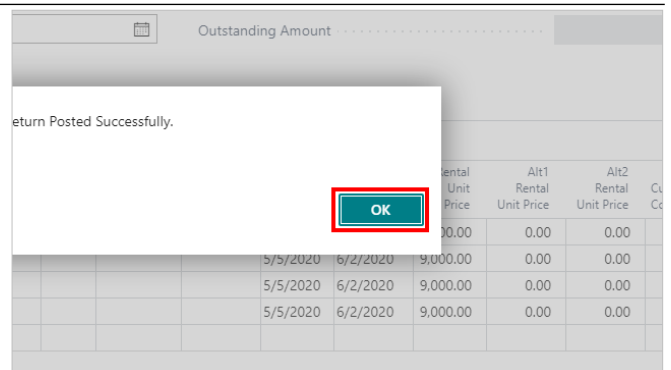
Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

							Rental Unit Price	Alt1 Rental Unit Price
1	WEST			5/5/2020	6/2/2020	9,000.00	0.00	
1	WEST			5/5/2020	6/2/2020	9,000.00	0.00	
1	WEST			5/5/2020	6/2/2020	9,000.00	0.00	

Click on the button **OK**



Return Posted Successfully.

OK

							Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cu
				5/5/2020	6/2/2020	9,000.00	0.00	0.00		
				5/5/2020	6/2/2020	9,000.00	0.00	0.00		
				5/5/2020	6/2/2020	9,000.00	0.00	0.00		

3.19.2.4. Processing Bulk Returns from the Rental Line

Profile - Sales Order Processor

Bulk Returns from the Rental Contract, Rental Lines can as well be processed from the Business Manager Profile using the steps provided here.

The following example demonstrates the using the Bulk Returns feature from the Rental Lines on an open contract that has been shipped, however, has not been invoiced.

In the example, some of the units are being returned the day before the Rental Return Date on the rental lines.



Click on **Rental Unit No. = RU00010-001**, **Rental Terms Code = MONTH-PEND**, **Rental Quantity = 1**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
RU00010		Framing Air Nailer Group	MONTH-PE				
→ RU00010-001	:	Framing Air Nailer	MONTH-PE				
RU00010-002		Framing Air Nailer	MONTH-PE				
RU00010-003		Framing Air Nailer	MONTH-PE				
RU00007		165 G Brad Nailer	MONTH-PE				

Click on the row menu button

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
RU00010		Framing Air Nailer Group	MONTH-PE				
→ RU00010-001	:	Framing Air Nailer	MONTH-PE				
RU00010-002		Framing Air Nailer	MONTH-PE				
RU00010-003		Framing Air Nailer	MONTH-PE				
RU00007		165 G Brad Nailer	MONTH-PE				

Click on the menu item **Select More**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
RU00010		Framing Air Nailer Group	MONTH-PE				
→ RU00010-001	:	Framing Air Nailer	MONTH-PE				
R		New Line	MONTH-PE				
R		Delete Line	MONTH-PE				
p		Select More	MONTH-PE				
RU00010-002		Framing Air Nailer	MONTH-PE				
RU00010-003		Framing Air Nailer	MONTH-PE				
RU00007		165 G Brad Nailer	MONTH-PE				

Sales Lines				Manage	Line	Fewer options
Type	No.	Description	Location Cod			

Click on **Rental Unit No. = RU00010-003**, **Rental Terms Code = MONTH-PEND**, **Rental Quantity = 1**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Code				
RU00010		Framing Air Nailer Group	MON				
→ RU00010-001	:	Framing Air Nailer	MON				
RU00010-002		Framing Air Nailer	MON				
RU00010-003	:	Framing Air Nailer	MON				
RU00007		165 G Brad Nailer	MON				

Sales Lines				Manage	Line	Fewer options
-------------	--	--	--	--------	------	---------------



Click on **Rental Unit No. = RU00007**, **Rental Terms Code = MONTH-PEND**, **Rental Quantity = 1**

Rental Lines	manage	Line	Functions	fewer options
<input type="radio"/> Rental Unit No.		Standard Text Code	Description	Rental Code
<input type="radio"/> RU00010			Framing Air Nailer Group	MON
<input checked="" type="radio"/> RU00010-001			Framing Air Nailer	MON
<input type="radio"/> RU00010-002			Framing Air Nailer	MON
<input checked="" type="radio"/> RU00010-003			Framing Air Nailer	MON
<input checked="" type="radio"/> RU00007			165 G Brad Nailer	MON

Sales Lines	Manage	Line	fewer options
-------------	--------	------	---------------

Alternatively, the individual lines can be selected in the same manner as non-consecutive lines can be selected in excel.

Select the first line, press and hold the Ctrl key on the keyboard, then select the other lines that have the units that will be returned.

Should the units being returned at the same time be consecutive, then as with excel, select the first record, the press and hold the Shift key on the keyboard and select the last record.

Click on the navigation menu item popup **Functions**

Posting Date	5/20/2020
Order Date	5/20/2020
Document Date	5/20/2020

Rental Lines	Manage	Line	Functions	fewer options
<input type="radio"/> Rental Unit No.		Standard Text Code	Description	Rental Term Code
<input type="radio"/> RU00010			Framing Air Nailer Group	MONTH-P
<input checked="" type="radio"/> RU00010-001			Framing Air Nailer	MONTH-P
<input type="radio"/> RU00010-002			Framing Air Nailer	MONTH-P

Click on the navigation menu item **Bulk Returns**

Contract Total	
Outstanding Amount	

ntal PO(s)	Open Sub Rental Purchase Order	Bulk Returns
------------	--------------------------------	---------------------

	Updates Qty. To Return for all rental lines with
TH-PEND 3 EAST	5/20/2020 6/19/2020 600.00
TH-PEND 1 EAST	5/20/2020 6/19/2020 600.00
TH-PEND 1 EAST	5/20/2020 6/19/2020 600.00
TH-PEND 1 EAST	5/20/2020 6/19/2020 600.00
TH-PEND 1 EAST	5/20/2020 6/19/2020 500.00



ODT Rentals Online Help

Click on the toggle field Update Return Date

Click on the button OK

Click on the cell **Rental Return Date** with the value **6/18/2020**

Note that only the selected rental lines have the Rental Return Date modified to the Return Date entered on the Bulk Return page.

Line	Functions	Fewer options									
Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C	C		
			5/20/2020	6/19/2020	600.00	0.00	0.00				
			5/20/2020	6/18/2020	600.00	0.00	0.00				
			5/20/2020	6/19/2020	Type the date in the format M/d/yyyy						
			5/20/2020	6/18/2020	600.00	0.00	0.00				
			5/20/2020	6/18/2020	500.00	0.00	0.00				

Click on the cell **Qty. to Return** with the value **1**

Note that only the selected rental lines have the Qty. to Return populated.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.
0.00		SUPPLIES	0	0	0	0	0	<input checked="" type="checkbox"/>	-
0.00		SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	-
0.00		SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	-
0.00		SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	-
0.00		SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	-



ODT Rentals Online Help

Click on the field **Posting Date**

The Posting Date needs to have the date set to when the units were returned.

Actions Navigate Fewer options

Adatum Corporation

5/20/2020

5/20/2020

5/20/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

5/20/2020

May 2020

Su Mo Tu We Th Fr Sa Next

1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Click on a date in the calendar

5/20/2020

June 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Go to today Done

Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Start Date	Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
EAST				5/20/2020	6/19/2020	600.00	0.00	0

Dynamics 365 Business Central

←

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00026 | WORK DATE: 8/8/2020

Rental Contract · RC00026

Process

Contract

Rental

Actions

Navigate

Fewer options

General

Sell-to Customer Name

Quote No.

Posting Date

Adatum Corporation

6/18/2020

Dynamic 365 Business Central

← EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00026 | WORK DATE: 8/8/2020

Rental Contract · RC00026

Process Contract Rental Actions Navigate Fewer options

Ship Rentals
 Return Rentals
 Bulk Returns
 Invoice
 Inventory

Post the return of the rental units on the rental lines. A posted returns.

Sell-to Customer Name Acadatum Corporation

Quote No.

Posting Date 6/18/2020

Are you sure you want to Return this rental contract?

Yes No

				Rental Unit Price	Alt1 Rental Unit Price
1	EAST	5/20/2020	6/18/2020	600.00	0.00
1	EAST	5/20/2020	6/19/2020	600.00	0.00
1	EAST	5/20/2020	6/18/2020	600.00	0.00
1	EAST	5/20/2020	6/18/2020	500.00	0.00

Return Posted Successfully.

OK

			Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Cu Co
			00.00	0.00	0.00	
	5/20/2020	6/18/2020	600.00	0.00	0.00	
	5/20/2020	6/19/2020	600.00	0.00	0.00	
	5/20/2020	6/18/2020	600.00	0.00	0.00	
	5/20/2020	6/18/2020	500.00	0.00	0.00	

The Bulk Returns page also includes the ability to specify that the units are to be returned to a different or temporary location as noted in the Bulk Returns Overview.

3.19.3.2. Processing Bulk Returns on the To Return List

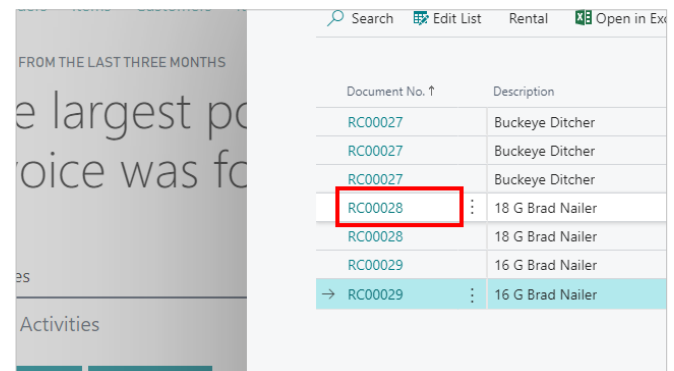
Profile - Sales Order Processor

Bulk Returns from the To Return list can as well be processed from the Business Manager Profile using the steps provided here.

The following example demonstrates the use of the Bulk Returns feature to return multiple units which are on different contracts at one time.

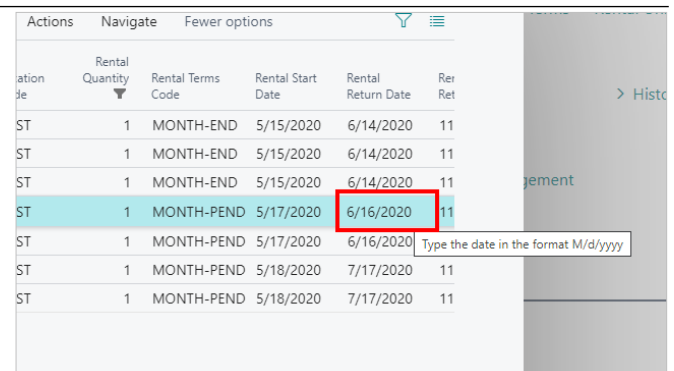
It also demonstrates the setting of the return date to the date the units are actually returned as one of the units on a contract is being returned a month and day earlier than the Rental Return Date on the line.

Click on the cell **Document No.** with the value **RC00028**



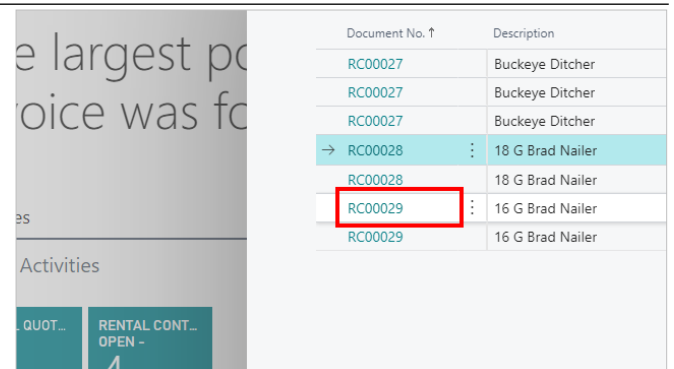
Document No. ↑	Description
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00028	18 G Brad Nailer
RC00028	18 G Brad Nailer
RC00029	16 G Brad Nailer
→ RC00029	16 G Brad Nailer

Click on the cell **Rental Return Date** with the value **6/16/2020**



Location	Rental Quantity	Rental Terms Code	Rental Start Date	Rental Return Date	Rer Ret
ST	1	MONTH-END	5/15/2020	6/14/2020	11
ST	1	MONTH-END	5/15/2020	6/14/2020	11
ST	1	MONTH-END	5/15/2020	6/14/2020	11
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11
ST	1	MONTH-PEND	5/18/2020	7/17/2020	11
ST	1	MONTH-PEND	5/18/2020	7/17/2020	11

Click on the cell **Document No.** with the value **RC00029**



Document No. ↑	Description
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
→ RC00028	18 G Brad Nailer
RC00028	18 G Brad Nailer
RC00029	16 G Brad Nailer
RC00029	16 G Brad Nailer



ODT Rentals Online Help

Click on the cell **Rental Return Date** with the value **7/17/2020**

ation de	Quantity ▼	Rental Terms Code	Rental Start Date	Rental Return Date	Rer Ret	> Histo
ST	1	MONTH-END	5/15/2020	6/14/2020	11	
ST	1	MONTH-END	5/15/2020	6/14/2020	11	
ST	1	MONTH-END	5/15/2020	6/14/2020	11	
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11	
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11	
ST	1	MONTH-PEND	5/18/2020	7/17/2020	11	
ST	1	MONTH-PEND	5/18/2020	7/17/2020	11	Type the date in the format M/d/yyyy

Click on the cell **Document No.** with the value **RC00028**

Document No. ↑	Description
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
→ RC00028	18 G Brad Nailer
RC00028	18 G Brad Nailer
RC00029	16 G Brad Nailer
RC00029	16 G Brad Nailer

Click on the row menu button

Document No. ↑	Description	Location Code
RC00027	Buckeye Ditcher	EAST
RC00027	Buckeye Ditcher	EAST
RC00027	Buckeye Ditcher	EAST
→ RC00028	18 G Brad Nailer	EAST
RC00028	Show more options	EAST
RC00029	16 G Brad Nailer	EAST
RC00029	16 G Brad Nailer	EAST

Click on the menu item **Select More**

Document No. ↑	Description
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
→ RC00028	18 G Brad Nailer
Select More	18 G Brad Nailer
RC00029	16 G Brad Nailer
RC00029	16 G Brad Nailer



ODT Rentals Online Help

Click on **Document No. = RC00029, Rental Unit No. = RU00009-001, Description = 16 G Brad Nailer**

<input type="radio"/> Document No. ↑	Description
<input type="radio"/> RC00027	Buckeye Ditcher
<input type="radio"/> RC00027	Buckeye Ditcher
<input type="radio"/> RC00027	Buckeye Ditcher
→ <input checked="" type="radio"/> RC00028	18 G Brad Nailer
<input type="radio"/> RC00028	18 G Brad Nailer
<input checked="" type="radio"/> RC00029	16 G Brad Nailer
<input type="radio"/> RC00029	16 G Brad Nailer

Alternatively, the individual lines can be selected in the same manner as non-consecutive lines can be selected in excel.

Select the first line, press and hold the Ctrl key on the keyboard, then select the other lines that have the units that will be returned.

Should the units being returned at the same time be consecutive, then as with excel, select the first record, the press and hold the Shift key on the keyboard and select the last record.

Click on the navigation menu item popup **Rental**

<input type="radio"/> Document No. ↑	Description	Location Code
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input checked="" type="radio"/> RC00028	18 G Brad Nailer	EAST
<input type="radio"/> RC00028	18 G Brad Nailer	EAST

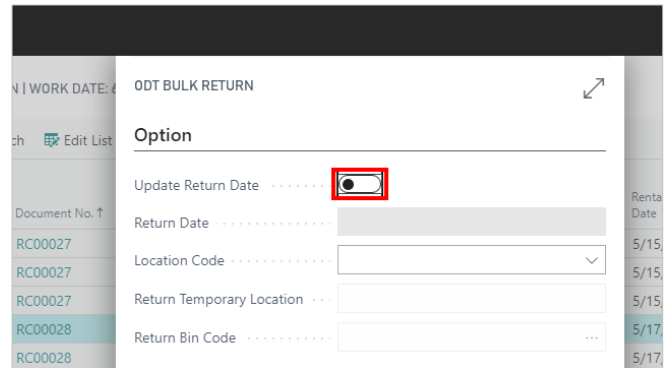
Click on the navigation menu item **Bulk Returns**

<input type="radio"/> Document No. ↑	Description	Location Code
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input type="radio"/> RC00027	Buckeye Ditcher	EAST
<input checked="" type="radio"/> RC00028	18 G Brad Nailer	EAST
<input type="radio"/> RC00028	18 G Brad Nailer	EAST

ODT Rentals Online Help

Click on the toggle field Update Return Date

As one of the unit lines selected has later date in the Rental Return Date field, the Update Return Date can be enabled and the date entered, which will update the unit Rental Return Date field.



ODT BULK RETURN

Option

Update Return Date ☒

Return Date

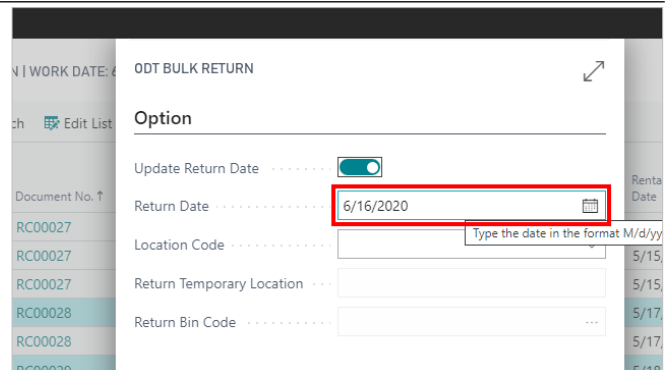
Location Code

Return Temporary Location

Return Bin Code

Click on the field **Return Date**

When the date the units were returned is different than the date displayed, then select or enter the date the units were actually returned on.



ODT BULK RETURN

Option

Update Return Date ☒

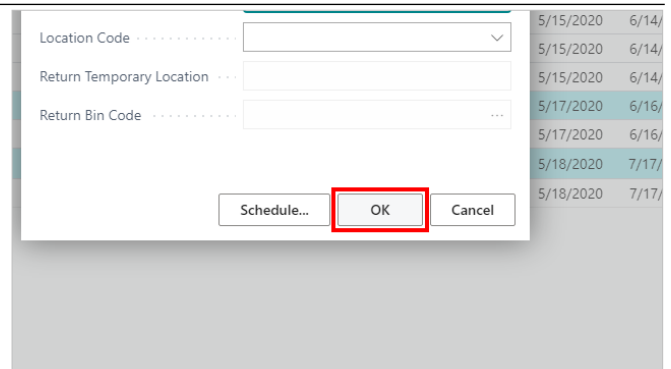
Return Date

Location Code

Return Temporary Location

Return Bin Code

Click on the button **OK**



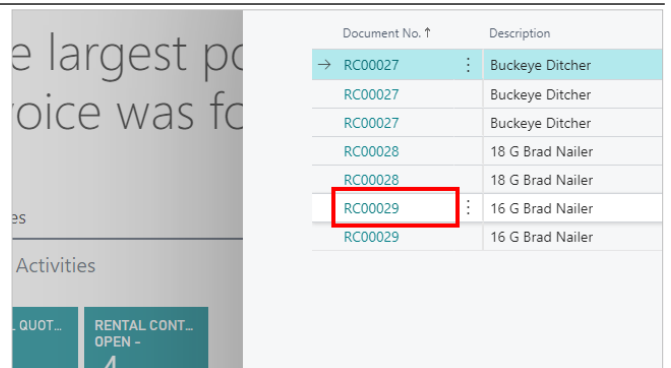
Location Code

Return Temporary Location

Return Bin Code

Schedule... **OK** Cancel

Click on the cell **Document No.** with the value **RC00029**



Document No. ↑	Description
→ RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00027	Buckeye Ditcher
RC00028	18 G Brad Nailer
RC00028	18 G Brad Nailer
RC00029	16 G Brad Nailer
RC00029	16 G Brad Nailer



ODT Rentals Online Help

Click on the cell **Rental Return Date** with the value **6/16/2020**

Note that the Rental Return Date has been updated to 6/16/2020 on the unit line which initially had a Rental Return Date of 7/17/2020.

ation de	Quantity ▼	Rental Terms Code	Rental Start Date	Rental Return Date	Rer Ret	> Histo
ST	1	MONTH-END	5/15/2020	6/14/2020	11	
ST	1	MONTH-END	5/15/2020	6/14/2020	11	
ST	1	MONTH-END	5/15/2020	6/14/2020	11	gement
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11	
ST	1	MONTH-PEND	5/17/2020	6/16/2020	11	
ST	1	MONTH-PEND	5/18/2020	6/16/2020	11	
ST	1	MONTH-PEND	5/18/2020	7/17/2020	11	

Click on the cell **Qty. to Return** with the value **1**

Note that on the unit lines selected prior to running the Bulk Return, now have the Qty. to Return field populated.

Rental Return Date	Rental Return Time	Qty. to Rent	Qty. on Rent ▼	Qty. to Return	Qty. Returned ▼	Partial Return Date	Return Location Code
6/14/2020	11:59:59 PM	0	1	0	0		
6/14/2020	11:59:59 PM	0	1	0	0		
6/14/2020	11:59:59 PM	0	1	0	0		
6/16/2020	11:59:59 PM	0	1	1	0		
6/16/2020	11:59:59 PM	0	1	0	1		
6/16/2020	11:59:59 PM	0	1	1	0		
7/17/2020	11:59:59 PM	0	1	0	0		

Click on the cell **Document No.** with the value **RC00028**

Document No. ↑	Rental Unit No.	Description	Location Code
→ RC00027	RU00002	Buckeye Ditcher	EAST
RC00027	RU00003	Buckeye Ditcher	EAST
RC00027	RU00005	Buckeye Ditcher	EAST
RC00028	RU00008-001	18 G Brad Nailer	EAST
RC00028	RU00008-002	18 G Brad Nailer	EAST
RC00029	RU00009-001	16 G Brad Nailer	EAST
RC00029	RU00009-002	16 G Brad Nailer	EAST

Click on the row menu button

Document No. ↑	Rental Unit No.	Description	Location Code
RC00027	RU00002	Buckeye Ditcher	EAST
RC00027	RU00003	Buckeye Ditcher	EAST
RC00027	RU00005	Buckeye Ditcher	EAST
→ RC00028	RU00008-001	18 G Brad Nailer	EAST
RC00028	RU00008-002	18 G Brad Nailer	EAST
RC00029	RU00009-001	16 G Brad Nailer	EAST
RC00029	RU00009-002	16 G Brad Nailer	EAST



Click on the menu item **Select More**

Document No. ↑	Rental Unit No.	Description	Location Code
RC00027	RU00002	Buckeye Ditcher	EAST
RC00027	RU00003	Buckeye Ditcher	EAST
RC00027	RU00005	Buckeye Ditcher	EAST
→ RC00028	RU00008-001	18 G Brad Nailer	EAST
Select More	RU00008-002	18 G Brad Nailer	EAST
RC00029	RU00009-001	16 G Brad Nailer	EAST
RC00029	RU00009-002	16 G Brad Nailer	EAST

Click on **Document No. = RC00029, Rental Unit No. = RU00009-001, Description = 16 G Brad Nailer**

Document No. ↑	Rental Unit No.	Description	Location Code
RC00027	RU00002	Buckeye Ditcher	E
RC00027	RU00003	Buckeye Ditcher	E
RC00027	RU00005	Buckeye Ditcher	E
→ RC00028	RU00008-001	18 G Brad Nailer	E
RC00028	RU00008-002	18 G Brad Nailer	E
RC00029	RU00009-001	16 G Brad Nailer	E
RC00029	RU00009-002	16 G Brad Nailer	E

Click on the navigation menu item popup **Rental**
As on the Bulk Returns page the Rental Return Date was updated, this is not required on the Rental Return page.

Dynamics 365 Business Central			
← TO RETURN | WORK DATE: 6/16/2020			
Search	Edit List	Rental	Open in Excel
Document No. ↑	Rental Unit No.	Description	Location Code
RC00027	RU00002	Buckeye Ditcher	E
RC00027	RU00003	Buckeye Ditcher	E
RC00027	RU00005	Buckeye Ditcher	E
RC00028	RU00008-001	18 G Brad Nailer	E
RC00028	RU00008-002	18 G Brad Nailer	E

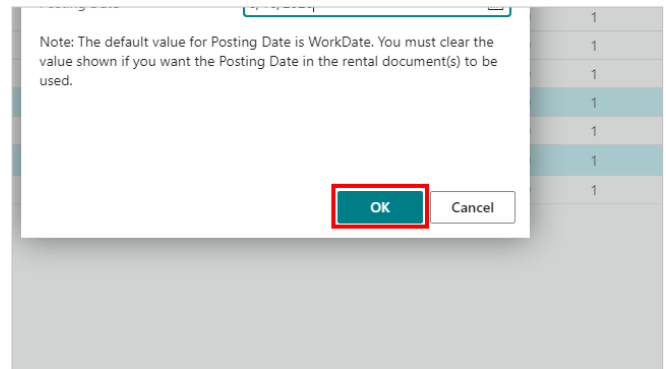
Click on the field **Posting Date**

Ensure the Posting Date is set to the date the units were returned on.

EDIT - RETURN RENTALS	
Update Return Date	<input type="checkbox"/>
New Return Date	
Posting Date	6/16/2020
Note: The default value for Posting Date is Work value shown if you want the Posting Date in the rental document(s) to be used.	

The Posting Date is used in the Rental ledger Entries and the Posted Return documents created when posting the return.

Click on the button **OK**



3.20.Rental Rapid Returns

3.20.1. Rental Rapid Returns Overview

3.20.1.1. Overview

Some rental organizations utilize barcodes on their rental product, and require the ability to return rental units using barcode scanning. The barcode may be the one on the product when purchased, which is the Serial No. of the product. Or the organization may have generated their own barcodes using the Rental Unit No. or a Lot No., and attached them to the units.

The Rental Rapid Return document provides the ability to quickly process full or partial returns, by scanning the barcode on the unit, whether the barcode is a Serial Number, Rental Unit No. or a Lot No.. In addition, the Serial No., Rental Unit No. or a Lot No. can be entered manually on the rapid return line.

Multiple Rental Rapid Return documents can be open with a different Rental Return Date, and if applicable, different Return Locations.

Each Rental Rapid Return document is per Rental Return Date and Posting Date, which means that all returns scanned or entered on the document lines will be returned on the same date and all related ledger entries will have the same Posting Date.

When the processing of the returns is completed on the rapid return document, then the Rental Rapid Return document will be flagged as completed and saved as a Posted Rental Rapid Return document.

The Posted Rental Rapid Returns menu option on the Business Manager role center is located in the Rentals main menu.

On the Sales Order Processor role center, the Posted Rental Rapid Returns menu option is located in the Posted Documents main menu.

3.20.2. How to Set-Up Rental Rapid Returns

3.20.2.1. Overview

A No. Series for the Rental Rapid Return documents is required, which must be specified on the Rental Management Setup, Numbering tab.

If the barcodes on the rental product are serial numbers, then the following setup and processing conditions apply.

- When the rental product is setup as individual rental units, then the serial number must be setup on the rental unit card.
- When the Rental Units are linked to inventory Items that are setup with an Item Tracking Code, the Rentals field must be enabled. The Serial Nos. must be assigned when the items are purchased, and must be specified on the contract. Item Tracking Lines when the unit is rented out.

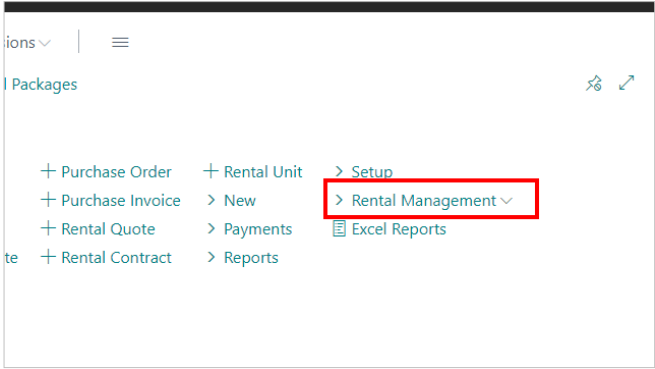


If the barcodes on the rental product have been generated with the Rental Unit No. being the barcode, then no other setup is required on the Rental Units.

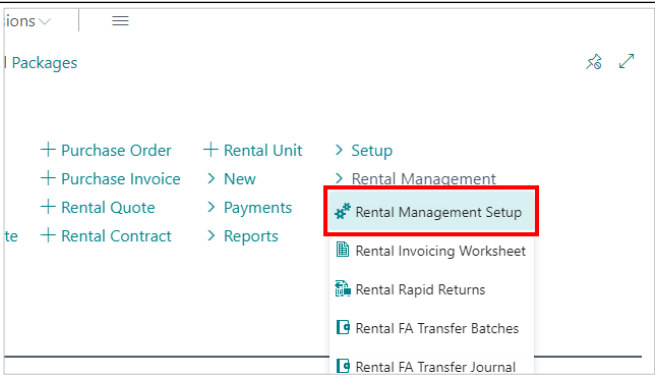
3.20.2.2. **How to Setup the Rapid Returns No. Series from Rental Managment Setup**

The following demonstrates the setup of No. Series from Rental Management Setup to populate the Rental Rapid Return Nos. on the Numbering tab.

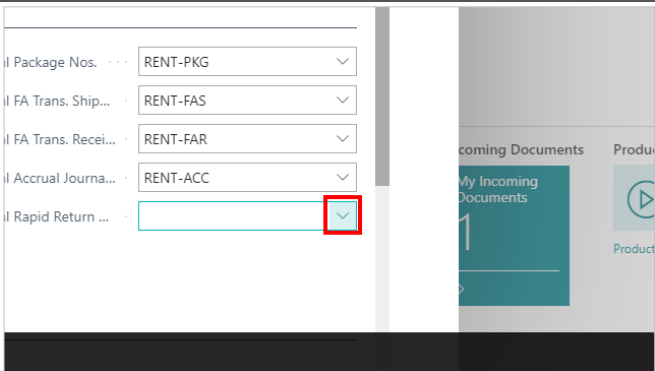
Click on the link **Rental Management**



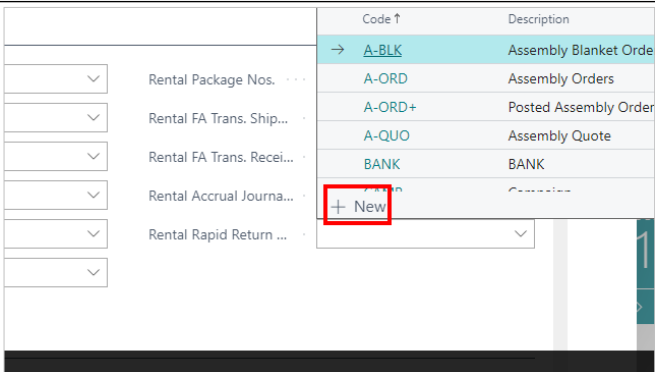
Click on the link **Rental Management Setup**.



Click on the lookup button **Rental Rapid Return Nos.**



Click on the link **New**





Click on the cell **Code**

Enter the text **Rapid Returns**.

Click on the cell **Description**

Enter the text **Rental Rapid Returns**.



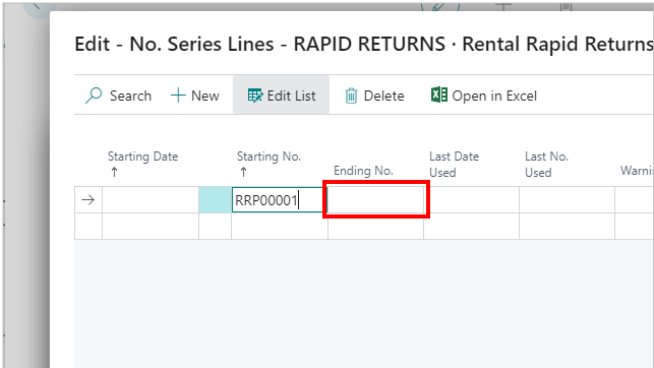
Click on **Default Nos.**

Click on the link in cell **Starting No.** with the value

Click on the cell **Starting No.**

Enter the text **RRP00001**.

Click on the cell **Ending No.**

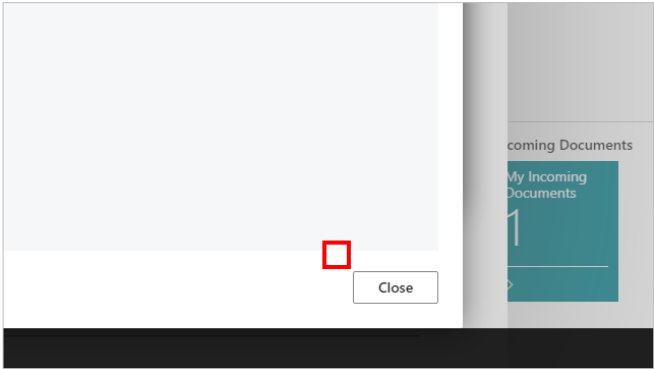


Edit - No. Series Lines - RAPID RETURNS · Rental Rapid Returns

Search + New Edit List Delete Open in Excel

Starting Date	Starting No.	Ending No.	Last Date Used	Last No. Used	Warni
→	RRP00001				

Enter the text **RRP99999**.



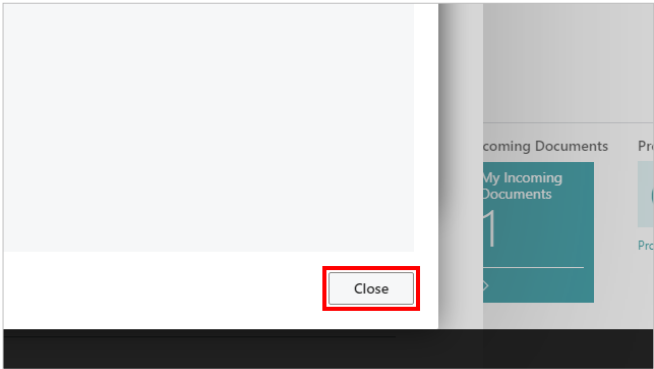
coming Documents

My Incoming Documents

1

Close

Click on the button **Close**



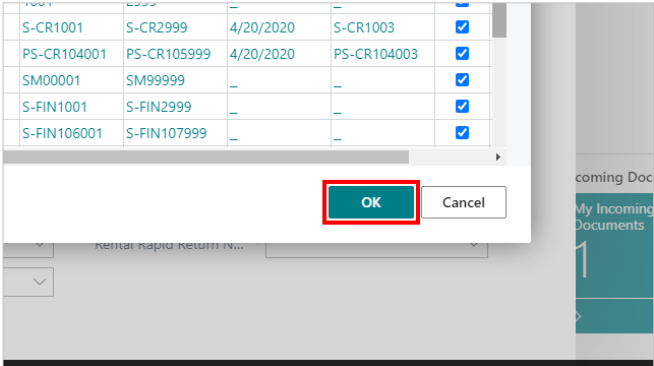
coming Documents

My Incoming Documents

1

Close

Click on the button **OK**



Serial No.	Contract No.	Start Date	End Date	Check
S-CR1001	S-CR2999	4/20/2020	S-CR1003	<input checked="" type="checkbox"/>
PS-CR104001	PS-CR105999	4/20/2020	PS-CR104003	<input checked="" type="checkbox"/>
SM00001	SM99999	-	-	<input checked="" type="checkbox"/>
S-FIN1001	S-FIN2999	-	-	<input checked="" type="checkbox"/>
S-FIN106001	S-FIN107999	-	-	<input checked="" type="checkbox"/>

OK Cancel

3.20.3. Processing Rental Rapid Returns Overview

3.20.3.1. Processing Rental Rapid Returns Overview

Whether scanning barcodes that are Serial Nos. or Rental Unit Nos., then all open Rental Contract, Rental Lines and, if applicable, Rental Item Tracking Lines are searched to locate the Serial No. or Rental Unit No. And thus locates the Rental Contract line or lines the unit has been shipped on.

The same process occurs when manually entering a Serial No. or Rental Unit No. on the Rental Rapid Return Lines.



Should the Rental Unit have been shipped on multiple rental lines or multiple contracts, then a Contract Line list will be provided to select the applicable rental line.

Processing returns when Rental Locations are mandatory

When using Rental Locations, and on Rental Management Setup, the Location Mandatory field is enabled, then the selection of the Return Location Code field on the Rental Rapid Return document becomes mandatory, and must be populated before any rapid return lines can be entered or scanned in.

- All rapid return lines created where the shipped from location is different than Return Location Code on general tab will have the Return Location Code field on the lines populated with the same Return Location Code.
- The Return Location Code on the General tab cannot be modified once any rapid return lines have been entered.

The Temporary Location description field on the general tab can only be modified, if the Location card selected in the Rental Return Location has Temporary Location enabled. The Temporary Location description field will then be mandatory.

- If the Return Location Code is a temporary location, then the Temporary Location field must be entered before any rapid return lines are created. All rapid return lines will have the Temporary Location field populated with the description entered on the general tab.
- The Temporary Location description field cannot be modified once rapid return lines created.

Processing returns when Rental Locations are not mandatory

When on Rental Management Setup, the Location Mandatory field is disabled, then the selection of a Return Location Code on the general tab is not mandatory.

- If a Return Location Code is not entered on the general tab, then any rapid return lines created will not have the Return Location populated.
- If there are records entered that were shipped from a Location, then the units/items will be returned to that Location.
- The Return location Code cannot be modified once any rapid return lines are created.

If a Return Location Code is entered on the general tab, before any rapid return lines are created, then all rapid return lines will have the Return Location populated with the location selected.

This occurs when the Rental Unit was shipped from a location that is different from the selected location.

The Return Location Code on the General tab cannot be modified once any rapid return lines are created.

Scanning Barcodes when the Serial No. is on the Rental Unit card

- If the barcode scanned is Serial No. which has been specified on the Rental Unit, and the Rental Unit does not allow overbooking, then the line will automatically be populated with the rental contract and rental line information.

Scanning Barcodes of Rental Units Linked to a Serialized Inventory Item:

- When a Serial No. has been scanned into the Scan Rental Unit field on a line, the Rental Lines which have been shipped, and Item Tracking Lines on all open rental contacts will be searched for the Serial No., and locate the related rental unit number, contract and rental line. Then the rapid return line fields will be populated with the applicable data.

Scanning Barcodes when the barcode scanned is the Rental Unit No.

- If the barcode scanned is the Rental Unit No., and the Rental Unit does allow overbooking, or is linked to an inventory item that is not serialized, and if the unit is on rent on more than one line of a contract, or is on more than one contract, then a Rental Contract Line List will be displayed for the user to select the applicable contract and contract rental line. The Rental Contract Line List displays only the contract lines on which the unit has been shipped.
- If the barcode scanned is the Rental Unit No., and the rental unit is linked to a serialized item, then if the unit is on more than one line of a contract or is on more than one contract, then a Rental Contract Line List will be displayed for the user to select the applicable contract and contract rental line. The Rental Contract Line List displays only the contract lines on which the unit has been shipped. After selecting the applicable

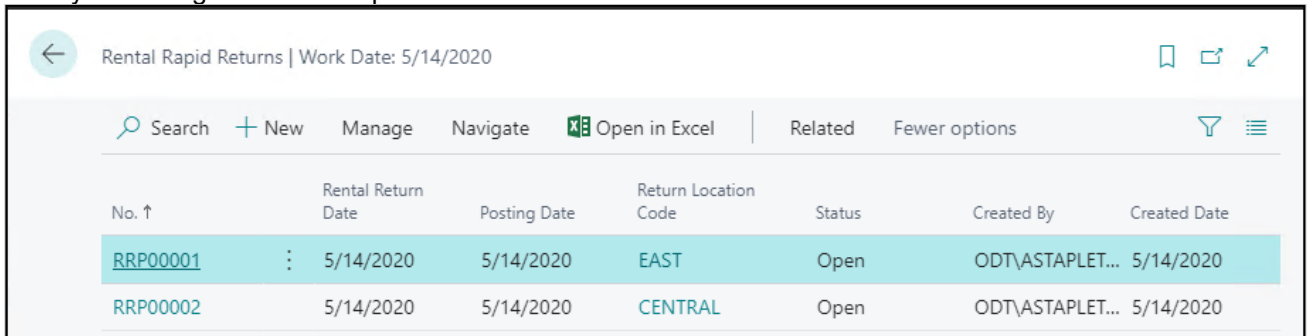
record and clicking on OK, then a list of Serial Nos. on the contract for the rental unit will be displayed. The user will need to select the applicable Serial No. related to the unit being returned.

3.20.3.2. Rental Rapid Return List and Document Overview

The following picture shows the Rental Rapid Return List, which will display all the open Rental Rapid Return documents, and is where new documents are created from.

The list can be located:

- In the Rentals main menu
- In the Actions section, Rental Management menu option
- By searching for Rental Rapid Return.



No. ↑	Rental Return Date	Posting Date	Return Location Code	Status	Created By	Created Date
RRP00001	5/14/2020	5/14/2020	EAST	Open	ODT\ASTAPLET...	5/14/2020
RRP00002	5/14/2020	5/14/2020	CENTRAL	Open	ODT\ASTAPLET...	5/14/2020

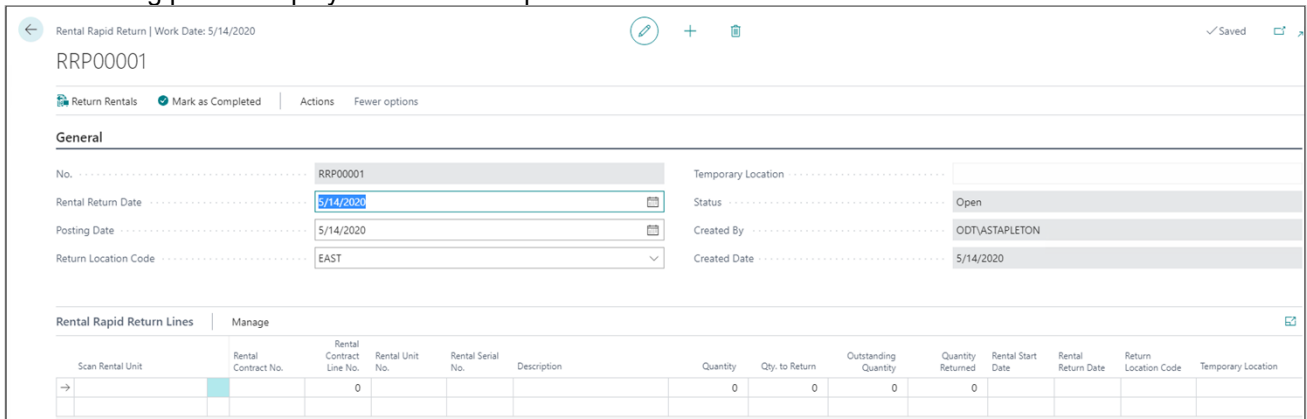
Menu Options:

- **New:** When selected creates a new Rental Rapid Return document.
- **Manage:** Contains the following 3 menu options.
- **Edit:** Opens the selected record in edit mode.
- **View:** Opens the selected record in view only mode.
- **Delete:** Deletes the selected document record.
- **Navigate:** Contains the menu option, Posted Rental Rapid Returns, which opens a listing of all the completed documents.

Column Fields:

- **No:** Displays the Rental Rapid Return document number.
- **Rental Return Date:** Displays the return date specified on the document.
- **Posting Date:** Displays the Posting Date specified on the document.
- **Return Location Code:** Displays the Return Location Code, if specified on the document.
- **Status:** Displays the status of the documents. On the Rental Rapid Return list the status will display Open.
- **Created By:** Displays the user which created the document.
- **Created Date:** Displays the date the document was created.

The following picture displays the Rental Rapid Return document.



Scan Rental Unit	Rental Contract No.	Rental Unit No.	Rental Serial No.	Description	Quantity	Qty. to Return	Outstanding Quantity	Quantity Returned	Rental Start Date	Rental Return Date	Return Location Code	Temporary Location
→		0			0	0	0	0				

Menu Options

- **Return Rentals:** When selected the return of the rental units on the lines will be posted on the applicable contracts, if there is a quantity in the Qty. to Return field.
- **Mark as Completed:** Provides the capability to mark the Rental Rapid Return document as completed.

General tab fields

- **No.:** The Rental Rapid Return document number will be automatically populated using the No. Series specified on Rental Management Setup, when clicking on any field on the General tab.
- **Rental Return Date:** All scanned or entered rental units will be returned on the date specified. When Return Rentals is ran the Rental Return Date on the contract rental lines will be set to the date specified.
- **Posting Date:** The Posting Date on all ledger entries creating when returning the rental units will have the Posting Date specified.
- **Return Location Code:** When entered, then all rental units will be returned to the rental location specified.
- **Temporary Location:** The entry of the description of temporary location is only available if the location code specified in the Return Location Code is a rental location configured as a temporary location. When a temporary location is specified, then the entry of a description of the location is mandatory.
- **Order Status, Created By and Created Date:** These fields are the same as on the Rental Rapid Return list.

Rental Rapid Return Lines:

- **Scan Rental Unit:** When scanning barcodes, the cursor must be placed in this field prior scanning. In addition to scanning barcodes, the Serial No. or the Rental Unit can be entered in this field.

For a brief explanation of the other fields on the lines, point the mouse at the column caption. Additional information on the fields will be provided in the How to Process Rapid Returns help documentation.

3.20.4. How to Process Returns Using Rental Rapid Returns

3.20.4.1. Processing Returns using the Rental Rapid Returns

The following examples will demonstrate the creation of Rental Rapid Return documents and the processing of full returns for:

- Barcode Scanning of Serial Nos. setup on the Rental Unit
- Barcode Scanning of Serial Nos. of Serialized Items linked to Rental Units
- Barcodes with Rental Unit Nos. Scanning

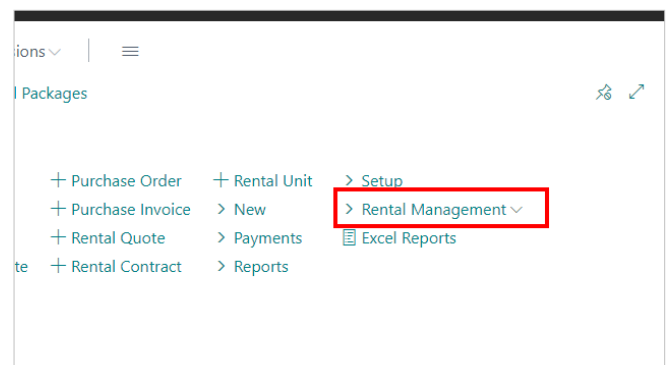
3.20.4.1.1. Creating a Rental Rapid Return Document

The following demonstrates the creating of a rapid return document when on Rental Management Setup, the field Location Mandatory is enabled.

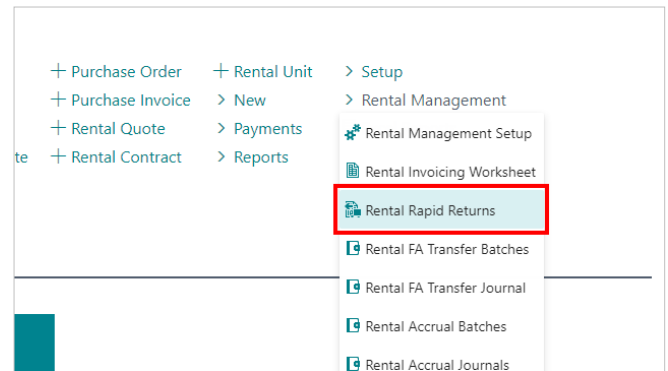
Therefore the Return Location Code is mandatory.

All returns recorded on this document will be returned to the Location selected on the General tab.

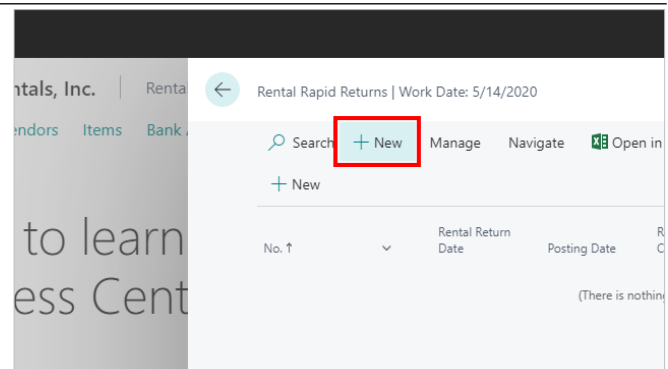
Click on the navigation menu item popup **Rental Management**



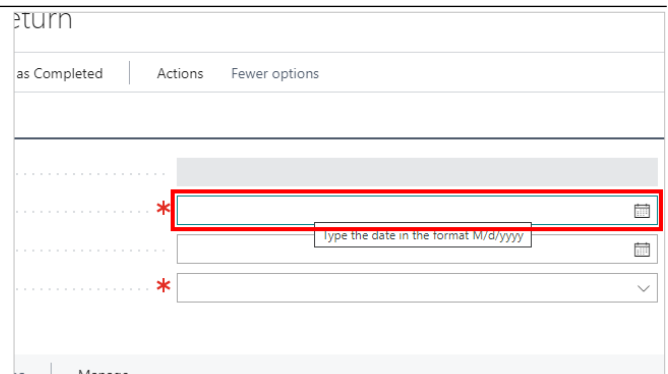
Click on the navigation menu item **Rental Rapid Returns**



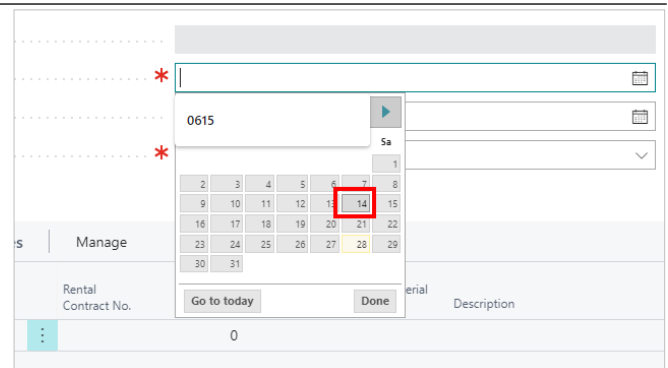
Click on the navigation menu item **New**



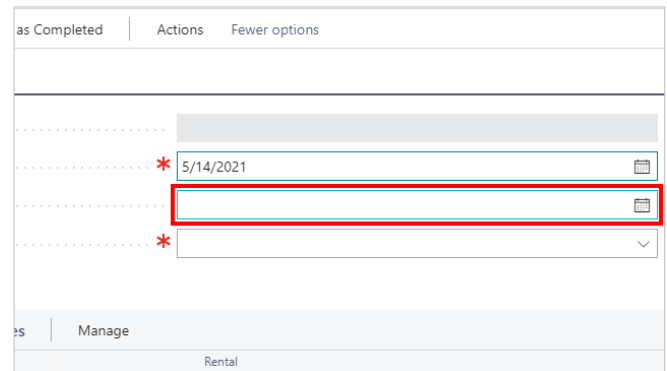
Click on the field **Rental Return Date**



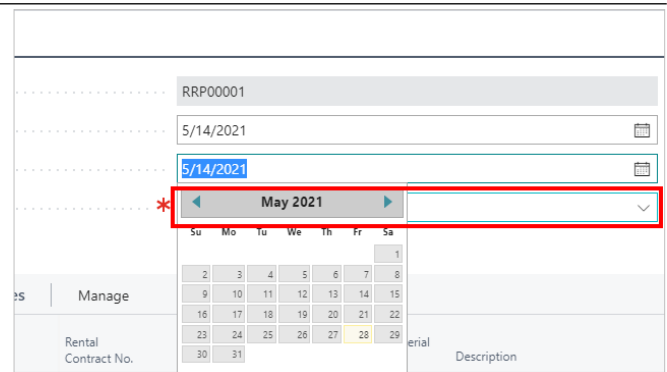
Click on a date in the calendar



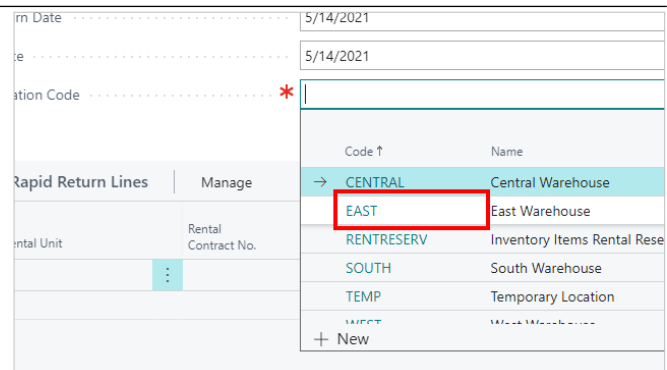
Click on the field **Posting Date**



Click on the field **Return Location Code**



Click on the link in cell **Code** with the value **EAST**



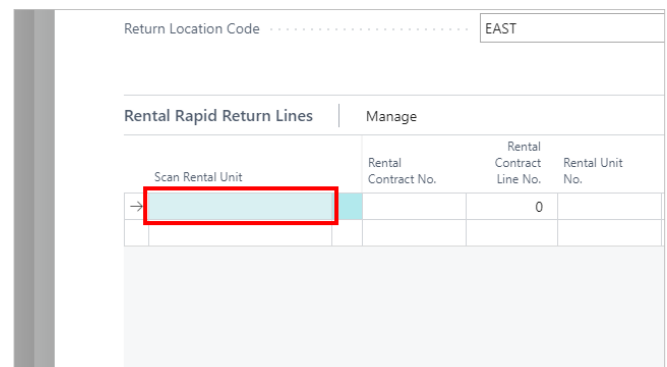
Once a rapid return line is created that the Rental Return Location cannot be edited. All unit returns recorded in the lines will be returned to this location.

3.20.4.1.2.

Returning a Rental Unit that has a Serial No.

The following demonstrates scanning in a barcode that is a Serial No., which is specified on a Rental Unit.

Click on the cell **Scan Rental Unit**



Scan the Serial No. barcode that is on the Rental Unit.



Click on the cell **Rental Contract No.** with the value **RC00005**

Note that the fields on the line are automatically populated.

Return Location Code EAST				
Rental Rapid Return Lines		Manage		
Scan Rental Unit	Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental No.
18BN-001	RC00005	20000	RU00008-001	188
→		0		

3.20.4.1.3.

Returning Serialized Items Linked to a Rental Unit

The following demonstrates scanning in Serial Nos. barcodes that are from an Inventory Item with Item Tracking which is linked to a Rental Unit.

The Rental Contract with the Rental Unit has a Rental Quantity of 2 and both Serial Nos. will be scanned, thus processing a full return of the Rental Unit.

Click on the cell **Scan Rental Unit**

Scan the Serial No. barcode that is on the rental Item.

Rental Rapid Return Lines					Manage	
Scan Rental Unit	Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.		
→ 18BN-001	RC00005	20000	RU00008-001	18BN-001		

Click on the cell **Scan Rental Unit**

Scan the Serial No. barcode that is on the rental Item.

Rental Rapid Return Lines					Manage	
Scan Rental Unit	Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.		
→ 18BN-001	RC00005	20000	RU00008-001	18BN-001		
→ SN00001	RC00007	10000	RU00027	SN00001		

Click on the cell **Scan Rental Unit** with the value **SN00002**

Note that when scanning in serialized items that individual lines are created for each Serial No. for the same contract and contract line no., while the contract has only one line for the Rental Unit linked to the serialized item.

Rental Rapid Return Lines					Manage	
Scan Rental Unit	Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.		
→ 18BN-001	RC00005	20000	RU00008-001	18BN-001		
SN00001	RC00007	10000	RU00027	SN00001		
SN00002	RC00007	10000	RU00027	SN00002		

3.20.4.1.4.

Returning a Rental Unit linked to an Inventory Item

The following example demonstrates the entry of a Rental Unit that is linked to an Inventory Item that is not a serialized item. The example also demonstrates the returning of the unit to a different location than it was



shipped from.

The rental item has a barcode that was generated and attached to the items using the Rental Unit No. to facilitate the scanning of the return of the rental items.

On the Rental Contact there are 2 rental lines with the same Rental Unit with different Rental Start Dates and Rental Return Dates.

The rentals were shipped from the West rental location. The first rental line will be returned to East rental location on the same date as the previous examples.

Therefore, the return is recorded on the same Rental Rapid Return document, which will demonstrate the Rental Contract Line. No. page where the user it to select the applicable Contract and line that is being returned.

Click on the cell **Scan Rental Unit**

Scan the barcode that was generated with the Rental Unit No. and attached to the rental item.

Rental Rapid Return Lines		Manage			
Scan Rental Unit		Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.
18BN-001		RC00005	20000	RU00008-001	18BN-001
SN00001		RC00007	10000	RU00027	SN00001
→ SN00002		RC00007	10000	RU00027	SN00002

Press the **Enter** key.

Rental Rapid Return Lines		Manage			
Scan Rental Unit		Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.
18BN-001		RC00005	20000	RU00008-001	18BN-001
SN00001		RC00007	10000	RU00027	SN00001
SN00002		RC00007	10000	RU00027	SN00002
→ PG-001			0		

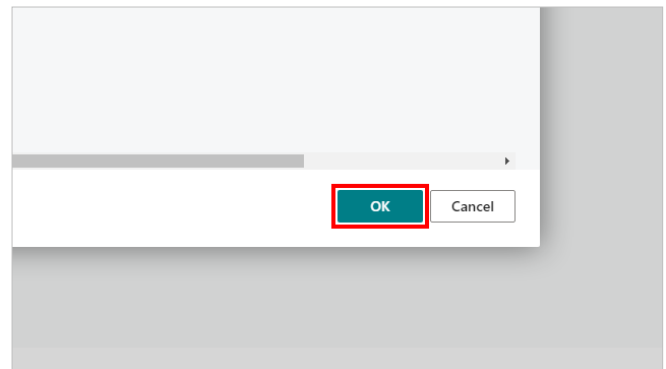
Click on the cell **Document No.** with the value **RC00008**

As the Rental Unit scanned has been shipped on multiple rental lines on a contract and on another contract, the Rental Contract Line List page opens. The user will need to select the applicable record for the rental items being returned.

Rental Contract Line List		Manage			
Docum... Type ↑	Document No. ↑	Sell-to Custom... No.	Line No. ↑	Group No.	Rental No. ↓
→ Rental C...	RC00008	10000	10000		PG-00
Rental C...	RC00008	10000	20000		PG-00
Rental C...	RC00009	20000	10000		PG-00



Click on the button **OK**



In this example the full quantity on rent for the Rental Unit on the same contract and rental line is being returned.

There are 2 methods that can be used for the entry.

1. Modify the Qty. to Return on the initial line scanned in.
2. Scan each item to be returned into the next line, Scan Rental Unit field. Each time the item is scanned and the same record in the Rental Contract Line List is selected, the initial line, Qty. to Return and Outstanding Quantity fields will be updated. For this example the Qty. to Returned will be modified.

Click on the cell **Qty. to Return** with the value **1**

Rental Serial No.	Description	Quantity	Qty. to Return	Outstanding Quantity	Quantity Returned	Rental Start Date
18BN-001	18 G Brad Nailer	1	1	0	0	4/15/2020
SN00001	Air Impact Wrench 1 in...	1	1	0	0	4/15/2020
SN00002	Air Impact Wrench 1 in...	1	1	0	0	4/15/2020
	Portable Generators	3	1	2	0	4/15/2020

Enter the text **3**.

		Created Date					5/14/2020	
	Quantity	Qty. to Return	Outstanding Quantity	Quantity Returned	Rental Start Date	Rental Return Date	Return Location Code	Tempo Location
er	1	1	0	0	4/15/2020	5/14/2021		
nch 1 in...	1	1	0	0	4/15/2020	5/14/2021		
nch 1 in...	1	1	0	0	4/15/2020	5/14/2021		
ators	3		2	0	4/15/2020	5/14/2021	EAST	

Click on the cell **Outstanding Quantity** with the value **0**

Note that the Outstanding Quantity field is automatically updated.

Description	Quantity	Qty. to Return	Outstanding Quantity	Quantity Returned	Rental Start Date	Rental Return Date
18 G Brad Nailer	1	1	0	0	4/15/2020	5/14/2021
Air Impact Wrench 1 in...	1	1	0	0	4/15/2020	5/14/2021
Air Impact Wrench 1 in...	1	1	0	0	4/15/2020	5/14/2021
Portable Generators	3	1	0	0	4/15/2020	5/14/2021



ODT Rentals Online Help

Click on the link in cell **Return Location Code** with the value **EAST**
As the Rental Unit was shipped from the West rental location, and the Rapid Return document header has the Return Location Code of East, then the Return Location Code on the line is automatically set to East.

Outstanding Quantity	Quantity Returned	Rental Start Date	Rental Return Date	Return Location Code	Temporary Location	Return Bin Code	Rental Terms Code
0	0	4/15/2020	5/14/2021				MONTH-PEN
0	0	4/15/2020	5/14/2021				MONTH-PEN
0	0	4/15/2020	5/14/2021				MONTH-PEN
0	0	4/15/2020	5/14/2021	EAST			MONTH-ENI

3.20.4.1.5. Processing the Returns from the Rental Rapid Return Document

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← Rental Rapid Return | Work Date: 5/14/2020

RRP00001

Return Rentals

Mark as Completed

Actions

Fewer options

General

No.

RRP00001

Rental Return Date

5/14/2021

Posting Date

5/14/2021

Click on the button **Yes**

Are you sure you want to process this rapid return?

Yes

No

Click on the button **OK**

Return Posted Successfully.

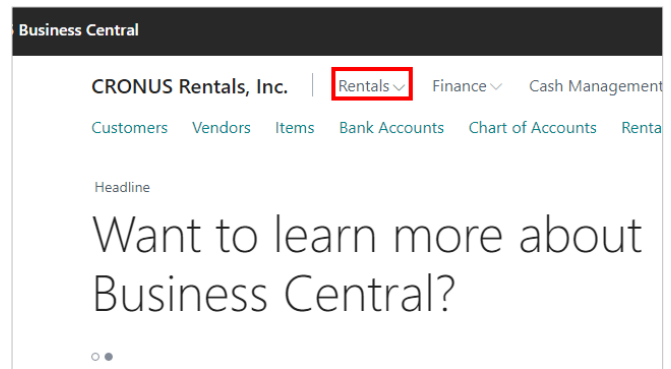
OK

As all records in the document consisted of full returns on each line the Rental Rapid Return document is set to Completed.

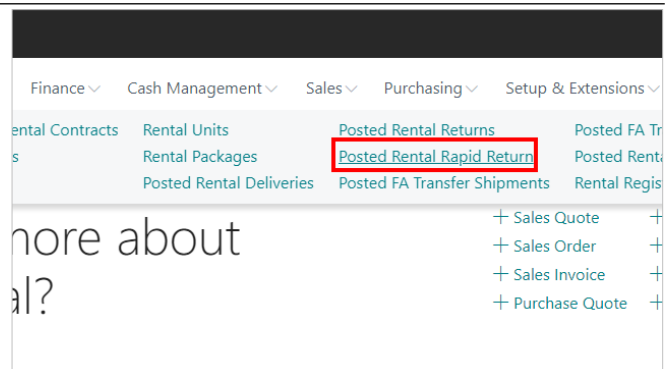
3.20.4.1.6. Accessing the Posted Rental Rapid Return Documents



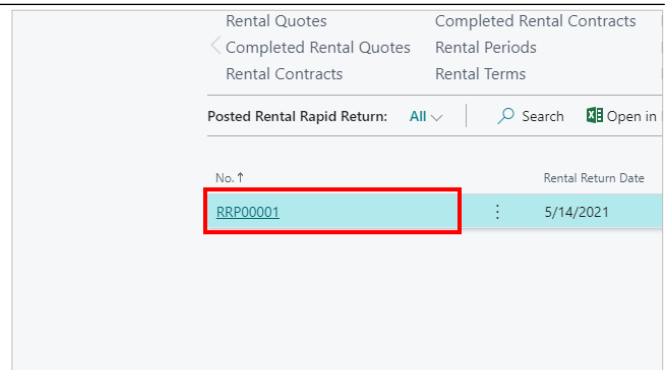
Click on the navigation menu item popup **Rentals**



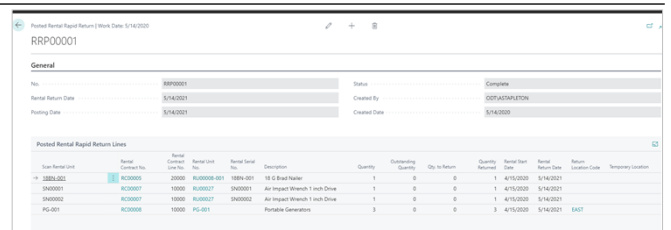
Click on the navigation menu item **Posted Rental Rapid Return**



Click on the link in cell **No.** with the value **RRP00001**



Posted Rental Rapid Return Document



3.20.5. How to Process Partial Returns on Rapid Returns

3.20.5.1. Overview

The processing of partial returns on the Rental Rapid Return documents will provide the same messages related to partial returns as when processing the partial return from the contract.

3.20.5.2. Processing a Partial Return

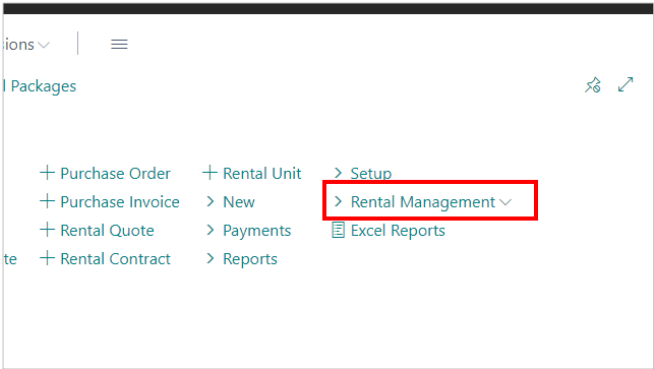
The following example demonstrates the processing of a partial return of a Rental Unit linked to an inventory item.

The rental contract line has a Qty. on Rent of 2 . The return will be to the same location from which it was shipped.

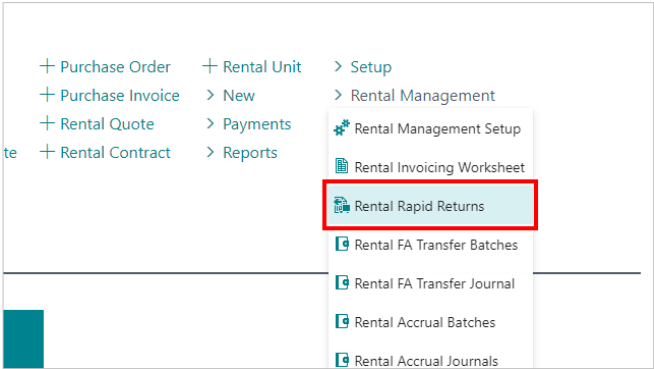


ODT Rentals Online Help

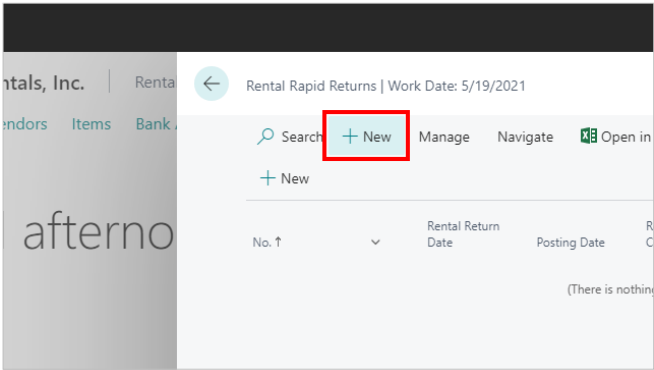
Click on the navigation menu item popup **Rental Management**



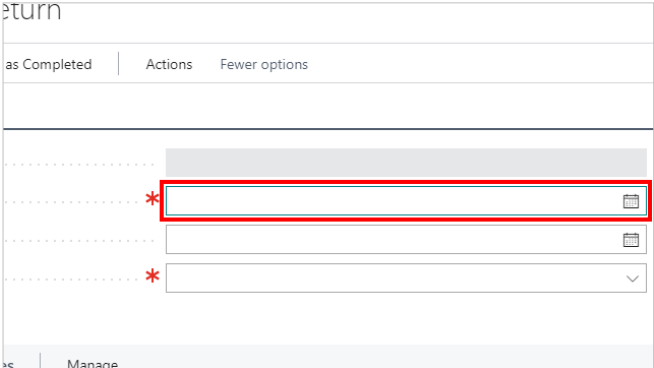
Click on the navigation menu item **Rental Rapid Returns**



Click on the navigation menu item **New**



Click on the field **Rental Return Date**





Click on a date in the calendar

Calendar view for May 2021. The date 5/19/2021 is highlighted in a red box.

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Click on the field **Return Location Code**

Form view showing the Return Location Code field. The field is highlighted in a red box.

Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.	Description	Quantity	Qty. Retu

Click on the link in cell **Code** with the value **WEST**

Table view showing the Return Location Code field. The field is highlighted in a red box.

Code	Name
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location
WEST	West Warehouse

Click on the cell **Scan Rental Unit**

Form view showing the Scan Rental Unit field. The field is highlighted in a red box.

Scan Rental Unit	Rental Contract No.	Rental Contract Line No.	Rental Unit No.	Rental Serial No.
			0	



ODT Rentals Online Help

Click on the cell **Document No.** with the value **RC00008**

Scan the barcode on the rental item.

The screenshot shows a 'Rental Contract Line List' table. The table has columns: Document No., Sell-to Custom..., Line No., Group No., and Rental No. The row for Document No. RC00008 is highlighted, showing a quantity of 10000. The row for Document No. RC00009 is also visible, showing a quantity of 20000.

Document No.	Sell-to Custom...	Line No.	Group No.	Rental No.
RC00008	10000	20000		PG-00
RC00009	20000	10000		PG-00

Click on the cell **Qty. to Return** with the value **1**
For this example only 1 rental item is being returned,
so the Qty. to Return will be left as 1.

The screenshot shows a 'Rental Serial' table. The table has columns: Rental Serial No., Description, Quantity, Qty. to Return, Outstanding Quantity, Quantity Returned, and Rental Start Date. The row for Rental Serial No. 2 is highlighted, showing a quantity of 1 in the Qty. to Return column.

Rental Serial No.	Description	Quantity	Qty. to Return	Outstanding Quantity	Quantity Returned	Rental Start Date
2	Portable Generators	2	1	1	0	4/20/2020

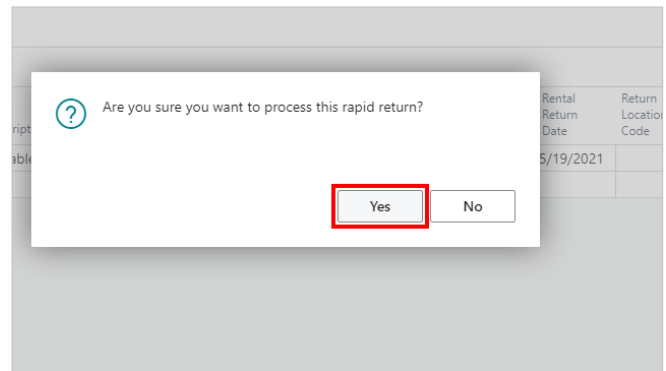
Click on the navigation menu item **Return Rentals**

The screenshot shows the 'Dynamics 365 Business Central' interface for 'Rental Rapid Return'. The form displays the rental number RRP00002. The 'Return Rentals' button is highlighted. The 'Mark as Completed' button is also visible. The 'General' section shows the rental number RRP00002, the rental return date 5/19/2021, and the posting date 5/19/2021.

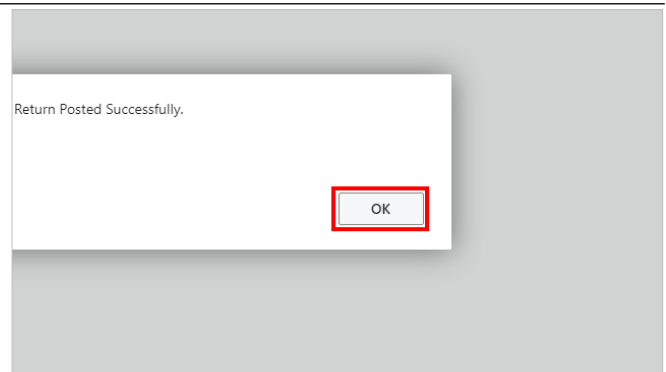
Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text: 'Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.' The 'Yes' button is highlighted.

Click on the button **Yes**



Click on the button **OK**



When the Return Rentals was ran, then on the Rental Contract , the rental line will be split, with one line recording the return of 1 per the rapid returns, and a new line containing the remaining quantity still on rent.

3.21.Returning Units to a Different Location

3.21.1. Returning Units to a Different or Temporary Location Overview

3.21.1.1. Overview

ODT Rentals provides the capability to return Rental Units to a different or temporary rental location from the Rental Contract or the To Return list. The Bulk Returns feature can be used to return units to a different or temporary location from the contract and the To Return list.

A temporary location is a location that is not owned by the organization. For example, a unit may be sent to a vendors' place of business for maintenance, rather than being returned to a company warehouse or yard. The temporary location must be setup in order to return to a temporary location.

NOTE:

The return to a different or temporary location can as well be performed on rental units that are not assigned to a Rental Group and are not linked to an Item or Fixed Asset when the Allow Overbooking field is enabled.

To learn about setting up a temporary location, see ODT Rental Online Help, Setup Rentals, Setup Rental Locations.

Additional fields using Personalize, will need to be added to the rental lines and/or the To Return list. The fields available to be added include Return Location Code, Return Temporary Location and Return Bin Code. The Return Temporary Location field is a text field for describing the temporary location and is mandatory when the Return Location selected is the temporary location.

When Rental Units are not linked or are linked to a G/L Account or Resource and are being returned to a different or temporary rental location, then the Rental Unit, Location Code field will be updated to the location the unit was returned to.

When Rental Units are linked to an Item, then when the Return Location Code is populated, the transfer order

created for the return will have the Transfer-To Location populated with the Return Location Code. The Item will be returned to the location specified upon the return of the Rental Unit.

The Return Bin Code field is for when returning Rental Units that are linked to an Item which was rented out from a location requiring the Bin Code. The Bin Code initially rented from defaults to the Return Bin Code and can be overridden to return the item to the initial location, but a different bin.

When the Return Location Code is populated with a different location that requires bins, then a Bin Code configured on the return location must be selected.

When Rental Units are linked to a Fixed Asset, then in order to ensure that the Rental Unit and the Fixed Asset Rental Locations are synchronized there are additional setups required.

On Rental Management Setup, the Rental FA Transfer Mandatory should be enabled, and the FA Trans. Receipt and FA Trans. Shipment No. Series fields populated.

When the Rental Unit is returned to a different or temporary rental location, the FA Transfer Journal will be created and posted, returning the unit to the specified location. The Fixed Asset, Rental Location and the Rental Unit, Location Code fields will be updated with the location entered in the Return Location Code field.

If the temporary location is selected in the Return Location Code, then the description entered in the Return Temporary Location field on the asset and unit cards will be populated.

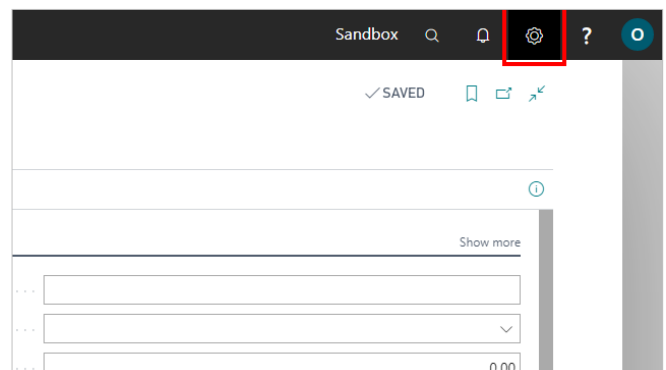
To learn about the Rental FA Transfer Journal, see ODT Rental Online Help, Additional Rental Processes.

3.21.1.2. How to Add the Return Location Fields

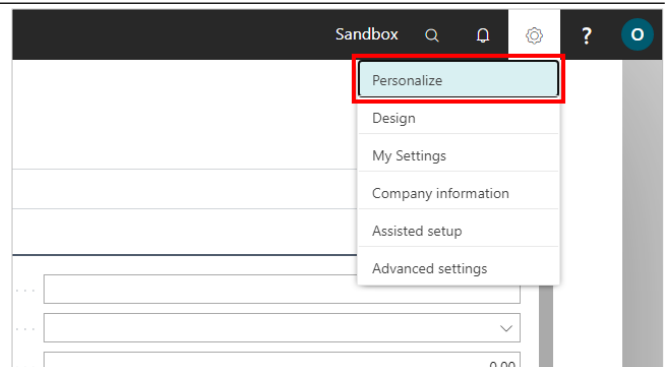
The following demonstrates adding the return fields to the Rental Lines on a Rental Contract.

The same steps can be used to add the fields to the To Return list, which is accessed from the To Return cue.

Click on the link **Settings**

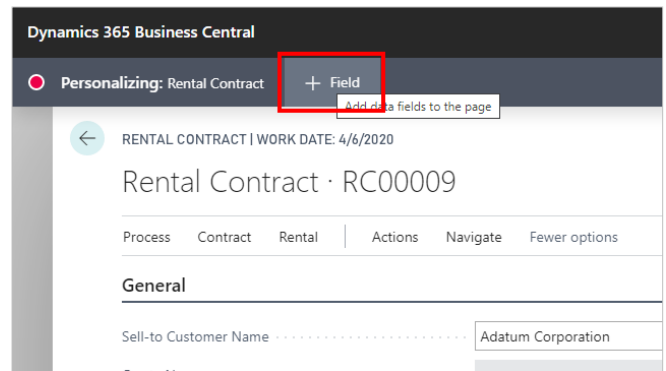


Click on the menu item **Personalize**

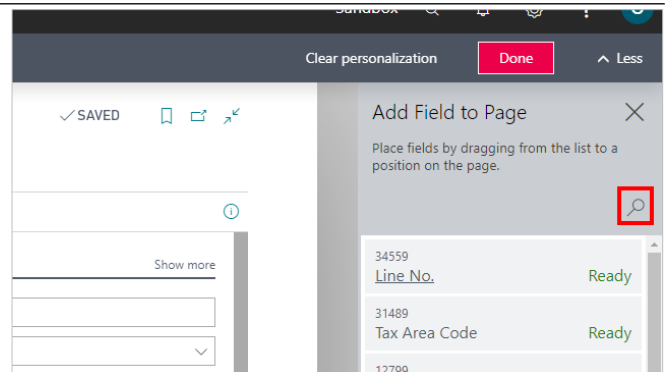


Click on the Rental Lines section of the contract.

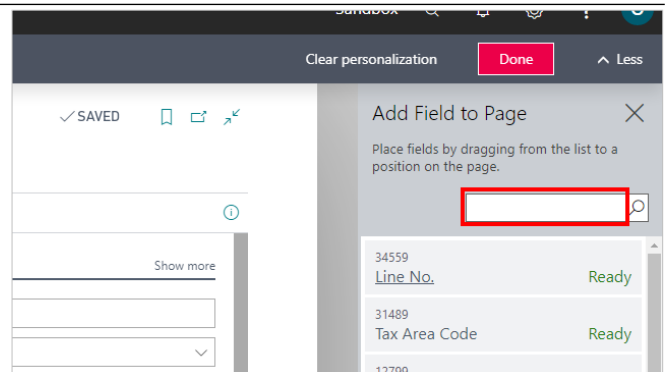
Click on the link **Field**



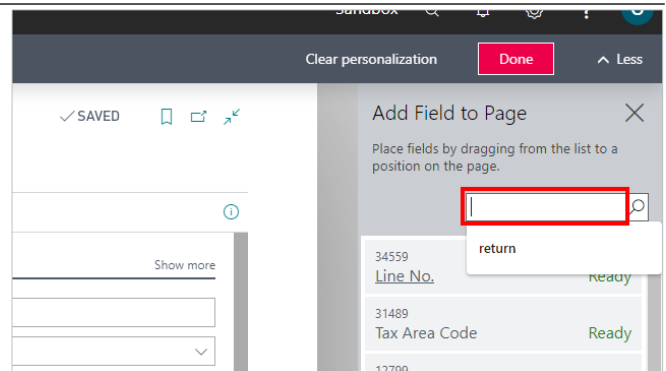
Click on the search button



Click on the field **Search Add Field to Page**

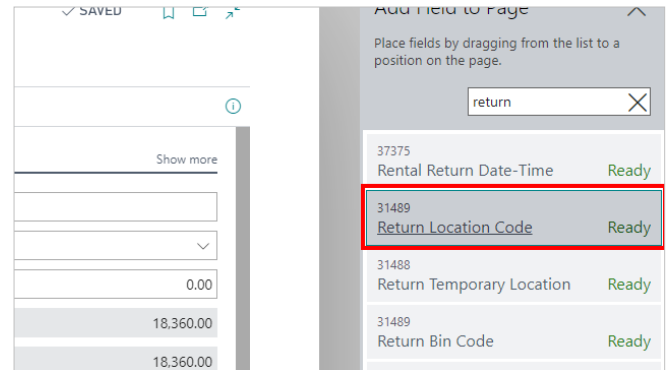


Enter the text **return**.



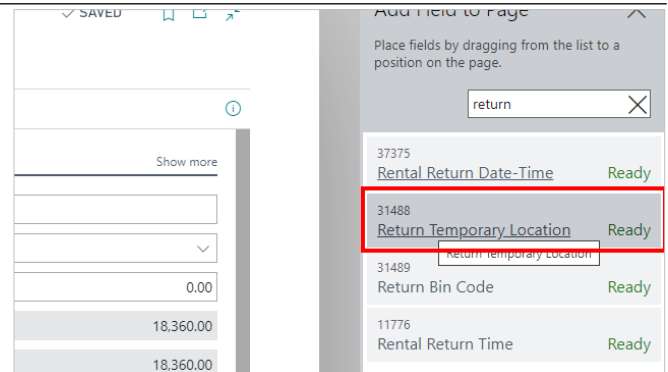
Click on the data brick **Return Location Code**

Drag and drop the field to the desired location on the rental line.



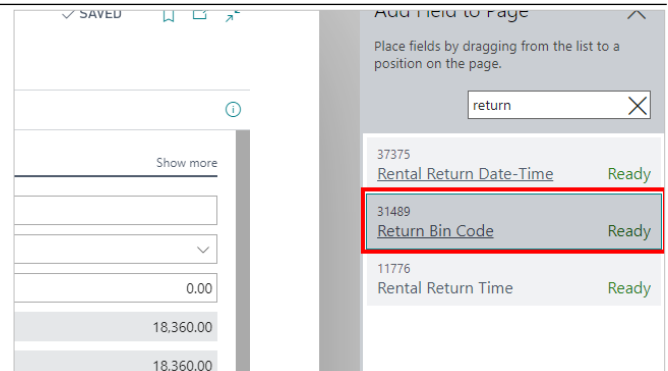
Click on the data brick **Return Temporary Location**

Drag and drop the field to the desired location on the rental line.

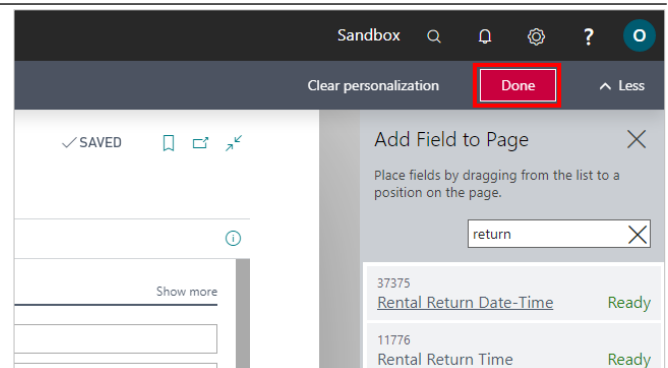


Click on the data brick **Return Bin Code**

Drag and drop the field to the desired location on the rental line.



Click on the link **Done**



3.21.2. How to Return Units to a Different or Temporary Location

3.21.2.1. Overview

The following examples demonstrate the returning of a Rental Unit that is not linked to another master record, to a different rental location and to a temporary rental location.

When a Rental Unit is linked to a G/L Account or Resource, the same steps and results will occur.

To learn about setting up a temporary location, see ODT Rental Online Help, Setup Rentals, Setup Rental



Locations.

3.21.2.2. How to Return a Rental Unit to a Different Location

The following example demonstrates the returning of a Rental Unit that is not linked to another master record, to a different rental location.

Click on the field **Posting Date**

Click on the link **Open the date picker**

Click on the link **Next**

Click on a date in the calendar



ODT Rentals Online Help

Click on the cell **Location Code** with the value **EAST**

Note that the Rental Unit was shipped from Location Code, EAST.

Rental Lines							Manage	Line	Functions	Fewer options	
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date					
RU00011	MONTH-PEND	2	EAST			4/6/2020					
RU00011-001	MONTH-PEND	1	EAST			4/6/2020					
RU00011-002	MONTH-PEND	1	EAST			4/6/2020				Look up value	

es Lines				Manage	Line	Fewer options	
----------	--	--	--	--------	------	---------------	--

Click on the cell **Qty. to Return** with the value **0**

Fewer options							
Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temp
	SUPPLIES	0	0	0	0		
	SUPPLIES	0	1	0	0		
	SUPPLIES	0	1	0	0		

ns							
----	--	--	--	--	--	--	--

Enter the text **1**.

Fewer options							
Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temp
	SUPPLIES	0	0	0	0		
	SUPPLIES	0	1	0	0		
	SUPPLIES	0	1	0	0		

ns							
----	--	--	--	--	--	--	--

Click on the cell **Return Location Code**

Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temporary Location
0	0	0	0		
0	1	1	0		
0	1	0	0		Look up value



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEST**

				Code ↑	Name
				EAST	East Warehouse
				RENTRESERV	Inventory Items Rental Rese
				SOUTH	South Warehouse
				TEMP	Temporary Location
				WEST	West Warehouse
				+ New Select record "WEST"	
Code	Quantity	Unit of Measure Code	U		
	0				

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00009

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00009

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

Post the return of the rental units on the rental lines. A pos returns.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the button **Yes**

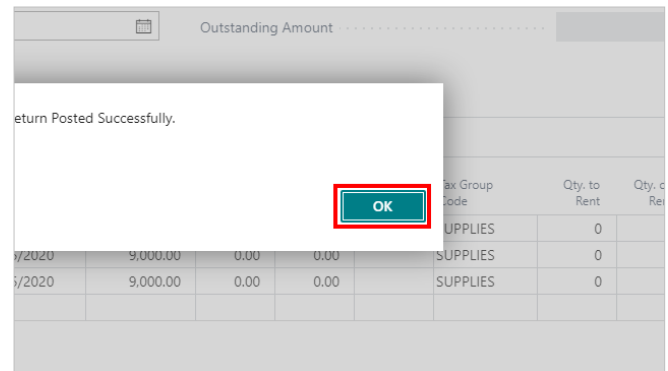
Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Return Bin Code

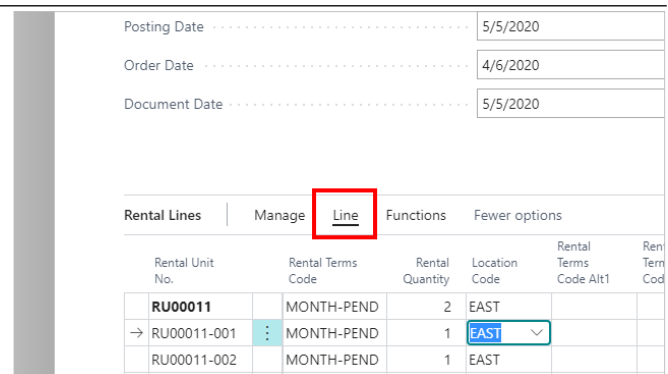
Click on the button **OK**



Return Posted Successfully.

OK

Click on the navigation menu item popup **Line**



Posting Date 5/5/2020

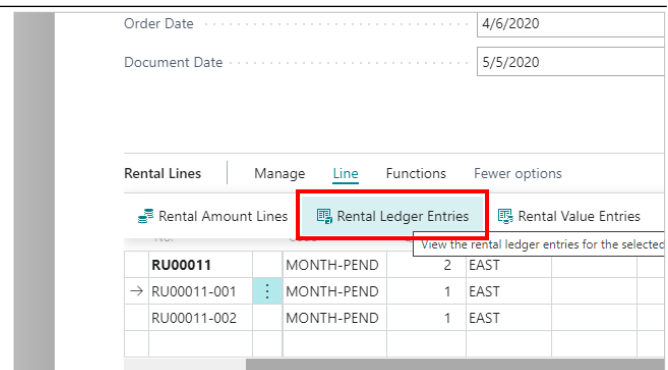
Order Date 4/6/2020

Document Date 5/5/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Cod
RU00011	MONTH-PEND	2	EAST		
→ RU00011-001	MONTH-PEND	1	EAST		
RU00011-002	MONTH-PEND	1	EAST		

Click on the navigation menu item **Rental Ledger Entries**



Order Date 4/6/2020

Document Date 5/5/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | **Rental Ledger Entries** | Rental Value Entries

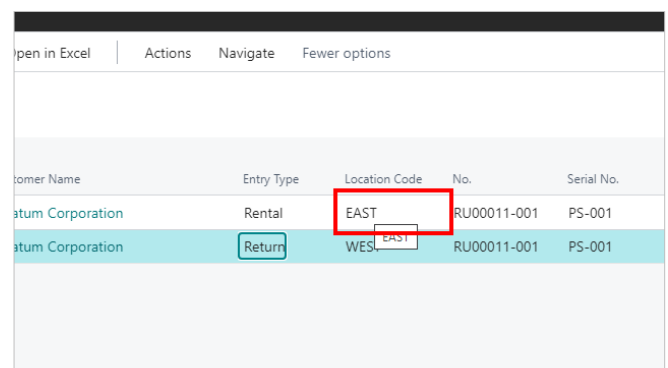
View the rental ledger entries for the selected

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Cod
RU00011	MONTH-PEND	2	EAST		
→ RU00011-001	MONTH-PEND	1	EAST		
RU00011-002	MONTH-PEND	1	EAST		

The Location Code field is available to add to the Rental Ledger Entries list using Personalized, for visibility as to where the Rental Unit was rented from and where it was returned to.

The Location Code was added for this example.
The Location Code field

Click on the cell **Location Code** with the value **EAST**



Open in Excel | Actions | Navigate | Fewer options

Customer Name	Entry Type	Location Code	No.	Serial No.
Stum Corporation	Rental	EAST	RU00011-001	PS-001
Stum Corporation	Return	WEST	RU00011-001	PS-001

ODT Rentals Online Help

Enter **Qty. to Return.**

Fewer options							
Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Term
	SUPPLIES	0	0	0	0		
	SUPPLIES	0	0	0	1	WEST	
	SUPPLIES	0	1	<input type="text" value="0"/>	0		

Click on the cell **Return Location Code**

Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temporary Location
0	0	0	0		
0	0	0	1	WEST	
0	1	1	0		Look up value

Click on the link in cell **Code** with the value **TEMP**

The screenshot shows the 'Warehouse' dropdown menu. The 'TEMP' option is highlighted with a red rectangle. The menu also includes options for 'CENTRAL', 'EAST', 'RENTRESERV', and 'SOUTH'. Below the list is a '+ New' button and a text input field containing 'Select record 'TEMP''.

Click on the cell **Return Temporary Location**

Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temporary Location	Return Bin Code
0	0	0			
0	0	1	WEST		
1	1	0	TEMP		



ODT Rentals Online Help

Enter the text **Joe's Maintenance Shop**.

Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Return Temporary Location	Return Bin Code
0	0	0			
0	0	1	WEST		
1	1	0	TEMP		

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00009

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/5/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/6/2020

Rental Contract · RC00009

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

Post the return of the rental units on the rental lines. A posted return.

Sell-to Customer Name

Quote No.

Posting Date 5/5/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Return Bin Code

0	0	1	WEST		
1	1	0	TEMP	Joe's Maintenance Shop	



Click on the button **OK**

Outstanding Amount

Return Posted Successfully.

OK

	Qty. on Rent	Qty. to Return	Qty. Returned
0.00	0.00	0	0
0.00	0.00	0	0
SUPPLIES	0	0	1
SUPPLIES	0	1	1
			0

Click on the navigation menu item popup **Line**

Posting Date 5/5/2020

Order Date 4/6/2020

Document Date 5/5/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
RU00011	EAST			4/6/2020	5/5/2020
RU00011-001	EAST			4/6/2020	5/5/2020
→ RU00011-002	EAST			4/6/2020	5/5/2020

Click on the navigation menu item **Rental Ledger Entries**

Order Date 4/6/2020

Document Date 5/5/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Ledger Entries

view the rental ledger entries for the selected rental line

Rental Unit No.	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
RU00011	EAST			4/6/2020	5/5/2020
RU00011-001	EAST			4/6/2020	5/5/2020
→ RU00011-002	EAST			4/6/2020	5/5/2020

Click on the cell **Location Code** with the value **EAST**

Open in Excel | Actions | Navigate | Fewer options

Customer Name	Entry Type	Location Code	No.	Serial No.
atum Corporation	Rental	EAST	RU00011-002	PS-002
atum Corporation	Return	TEMP	RU00011-002	PS-002



ODT Rentals Online Help

Click on the cell **Location Code** with the value **TEMP**

Open in Excel | Actions | Navigate | Fewer options				
Customer Name	Entry Type	Location Code	No.	Serial No.
atum Corporation	Rental	EAST	RU00011-002	PS-002
atum Corporation	Return	TEMP	RU00011-002	PS-002
TEMP				

Click on the button **Close**

0.00 ☐ RC00009 RC00009 2 ☐

0.00 ☐ RC00009 RC00009 4 ☐

Close

The following shows the Rental Unit Location Code and Temporary Location updated by the return to the temporary location.

Click on the link in cell **No.** with the value **RU00011-002**

RU00010-003	Framing Air Nailer	<input type="checkbox"/>	RU00010-003
RU00010-004	Framing Air Nailer	<input type="checkbox"/>	RU00010-004
RU00010-005	Framing Air Nailer	<input type="checkbox"/>	RU00010-005
RU00011	Power Shovel Group	<input checked="" type="checkbox"/>	RU00011
RU00011-001	Power Shovel	<input type="checkbox"/>	RU00011-001
RU00011-002	Power Shovel	<input type="checkbox"/>	RU00011-002
RU00011-003	Power Shovel	<input type="checkbox"/>	RU00011-003
RU00011-004	Power Shovel	<input type="checkbox"/>	RU00011-004
RU00011-005	Power Shovel	<input type="checkbox"/>	RU00011-005
RU00012	Cut-Off Gasoline Saw GRP - Hybrid	<input checked="" type="checkbox"/>	RU00012

Click on the field **Location Code**

RU00011-002

Power Shovel

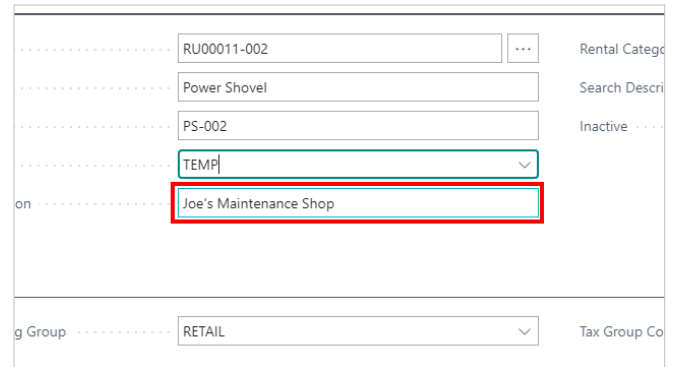
PS-002

TEMP

Joe's Maintenance Shop

Look up value

Click on the field **Temporary Location**



3.21.3. How to Return Units Linked to Serialized Items to a Different Location

3.21.3.1. Overview

Items which are serialized can be linked to a Rental Unit and rented out. The inventory for the item are updated, when the unit is shipped and returned.

The Rental Unit and linked serialized item can be returned to a different or temporary rental location.

In order to return Rental Units linked to serialized Items to a different rental location or temporary location the Return Location Code and Return Temporary Location fields must be added to the Rental Lines on a contract using Personalize.

To learn more about Rental Units linked to serialized Items, see ODT Rental Online Help, Processing Rentals, Rental Contracts with Rental Units Linked to Items.

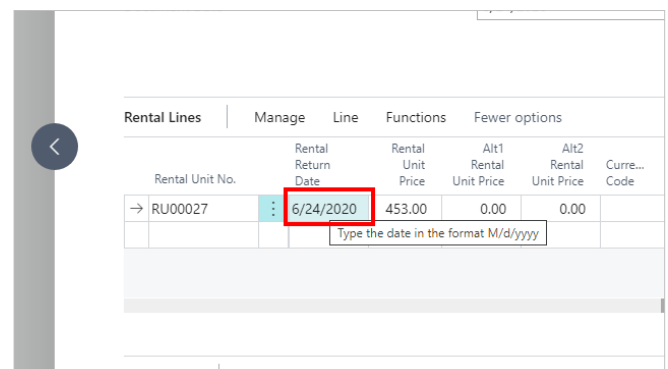
3.21.3.2. Returning a Unit Linked to a Serialized Item to a Different Location

This example demonstrates the returning of a Rental Unit linked to a serialized Item to a different rental location than they were shipped from.

The Rental Quantity shipped in this example is 2, and the full quantity will be returned to the different rental location on the Rental Return Date.

Click on the cell **Rental Return Date** with the value **6/24/2020**

Note the Rental Return Date as this is the date the unit has been returned.



Rental Unit No.	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code
→ RU00027	6/24/2020	453.00	0.00	0.00	



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

5/25/2020

5/25/2020 Type the date in the form

5/25/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

Click on the link **Next**

Adatum Corporation

5/25/2020

May 2020

Next

Functions

Click on a date in the calendar

Select the date the unit was actually returned on. In this example, select the same date as the Rental Return Date.

5/25/2020

June 2020

Go to today Done

Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code
...	Air Impact Wrench 1 inch Drive	MONTH-PEND	2	EAST	



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Alt1 Rental it Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qt Returns
0.00	0.00		SUPPLIES	0	2	0	

Enter the text **2**.

Alt1 Rental it Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qt Returns
0.00	0.00		SUPPLIES	0	2	2	

Click on the cell **Return Location Code**

Qty. ned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Departm Code
0	0	<input checked="" type="checkbox"/>	1053					

Click on the link in cell **Code** with the value **WEST**
Select the rental location the unit/items have been
returned to.

Code ↑	Name
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location
WEST	West Warehouse



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00032 | WORK DATE: 6/24/2020

Rental Contract · RC00032

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/24/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00032 | WORK DATE: 6/24/2020

Rental Contract · RC00032

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Invo

Post the return of the rental units on the rental lines. A posted re
turns.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/24/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Rental Unit Price 33.00

Alt1 Rental Unit Price 0.00

Click on the button **OK**

Outstanding Amount

Return Posted Successfully.

OK

Rental Unit Price 33.00

Alt1 Rental Unit Price 0.00

Alt2 Rental Unit Price 0.00

3.21.3.3. Returning a Unit Linked to a Serialized Item to a Temporary Location

This example demonstrates the returning of a Rental Unit linked to a serialized Item to a temporary rental location.

The Rental Quantity shipped in this example is 2, and the full quantity will be returned to the temporary rental location on the Rental Return Date.



ODT Rentals Online Help

Click on the cell **Rental Return Date** with the value **6/24/2020**

Note the Rental Return Date as this is the date the unit has been returned.

on	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
				5/25/2020	6/24/2020	453.00	0.00	0.00	
Type the date in the format M/d/yyyy									

Click on the field **Posting Date**

il | Actions | Navigate | Fewer options

Trey Research

5/25/2020

5/25/2020

5/25/2020

Type the date in the format M/d/yyyy

Click on the link **Open the date picker**

ons

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

Click on the link **Next**

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5/25/2020

May 2020

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Functions



ODT Rentals Online Help

Click on a date in the calendar

Select the date the unit was actually returned on. In this example, select the same date as the Rental Return Date.

5/25/2020

June 2020

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Go to today Done

Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code
:	Air Impact Wrench 1 inch Drive	MONTH-PEND	2	EAST	

Click on the cell **Qty. to Return** with the value 0

Alt1 Rental Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return
0.00	0.00		SUPPLIES	0	2	0	

Enter the text 2.

Alt1 Rental Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return
0.00	0.00		SUPPLIES	0	2	2	

Click on the cell **Return Location Code**

Qty. Ordered	Line Disc... %	Ret... Day Bill...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Departm Code
0	5	<input checked="" type="checkbox"/>	1054					

Look up value



ODT Rentals Online Help

Click on the link in cell **Code** with the value **TEMP**

When the temporary location code is selected, the Return Temporary Location field becomes editable and it is mandatory that a description of the location be entered.

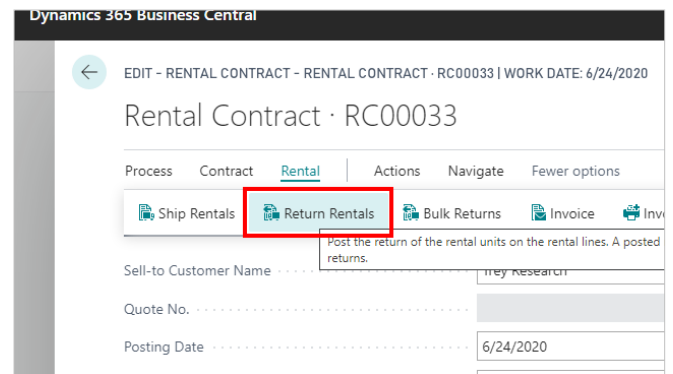
Click on the cell **Return Temporary Location**

Enter the text **Joess Maintenance Shop.**

Enter a description of the temporary location the unit/items have been returned to.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT - RC00033 | WORK DATE: 6/24/2020

Rental Contract · RC00033

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

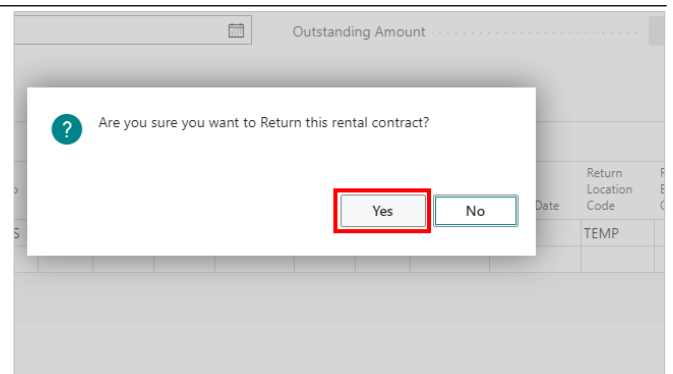
Post the return of the rental units on the rental lines. A posted returns.

Sell-to Customer Name mey Research

Quote No.

Posting Date 6/24/2020

Click on the button **Yes**



Outstanding Amount

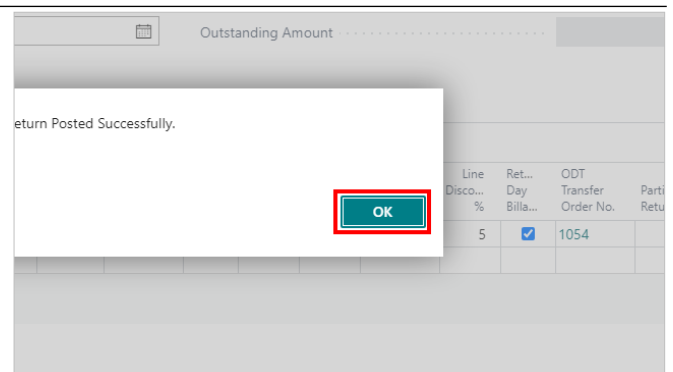
Are you sure you want to Return this rental contract?

Yes No

Return Location Code

TEMP

Click on the button **OK**



Outstanding Amount

Return Posted Successfully.

OK

Line	Ret...	ODT	Parti
Disco...	Day Billa...	Transfer Order No.	Retu
5	5	1054	

3.21.4. How to Return Units Linked to Items in Bins to a Different Location

3.21.4.1. Overview

Items which are stored in bins can be linked to a Rental Unit and rented out. The bin contents and inventory for the item are updated, when the unit is shipped and returned.

When returning the Rental Unit, the linked item can be returned to a different Bin Code in the location it was shipped from.

In addition, the Rental Unit and linked item can be returned to a different rental location with the item being returned to a Bin in that location. When returning the Rental Unit and linked item to a temporary rental location the item will not be returned to a Bin.

In order to return Rental Units linked to Items stored in bins to a different rental location or temporary location the Return Location Code, Return Bin Code and Return Temporary Location fields must be added to the Rental Lines on a contract using Personalize.

To learn more about Rental Units linked to Items stored in Bins, see ODT Rental Online Help, Processing Rentals, Rental Contracts with Rental Units Linked to Items.

3.21.4.2. Returning a Unit Linked to an Item Stored in Bins to a Different Bin

The following demonstrates the returning of a Rental Unit which is linked to an Item stored in bins, to the same location, but a different bin.

Click on the cell **Bin Code** with the value **C-001**

When the rental was shipped the items were shipped from the bin displayed in the Bin Code field. This was accomplished when the Transfer Order was posted when the Ship Rentals was ran.

Options							
Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
Bits 3/16...	MONTH-PEND	2	CENTRAL	C-001		5/15/2020	6/14/2020

Click on the field **Posting Date**

Actions
Navigate
Fewer options

Adatum Corporation

5/15/2020

5/15/2020

5/15/2020

Click on the link **Next**

Adatum Corporation

5/15/2020

May 2020

Su Mo Tu We Th Fr Sa Next

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Click on a date in the calendar

Select the date that the rental unit/items were returned on.

e No.

ng Date

r Date

ment Date

al Lines
Manage
Line
Functions

Rental Unit No.
Rental Return Date
Rental Unit Price
Rental Unit Price
Rental Unit Price
Curre... Code
Tax Group Code
Qty. to Rent

5/15/2020

June 2020

Su Mo Tu We Th Fr Sa

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Go to today
Done

RU00026
6/14/2020
5.00
0.00
0.00
SUPPLIES
0



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

ons										
Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	
0.00		SUPPLIES	0	2	0	0	0	<input checked="" type="checkbox"/>	1047	

Enter the text **2**.

ons										
Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	
0.00		SUPPLIES	0	2	2	0	0	<input checked="" type="checkbox"/>	1047	

Click on the cell **Return Bin Code** with the value **C-001**

Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Department Code	Custom...
0	<input checked="" type="checkbox"/> 1047			C-001	Look up value		

Click on the lookup button in the cell **Return Bin Code**

Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Department Code	Custom...
<input checked="" type="checkbox"/>	1047			C-001			



ODT Rentals Online Help

Click on the link in cell **Code** with the value **C-002**

Select the Bin Code where the Items were returned to.

The screenshot shows a 'BIN LIST' table in Dynamics 365 Business Central. The table has two columns: 'Code' and 'Description'. The first row is 'C-001' with description 'Central Bin C-0'. The second row is 'C-002' with description 'Central Bin C-0'. The 'C-002' row is highlighted with a red box.

Code	Description
C-001	Central Bin C-0
C-002	Central Bin C-0

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00025' page in Dynamics 365 Business Central. The 'Rental' menu item is highlighted with a red box.

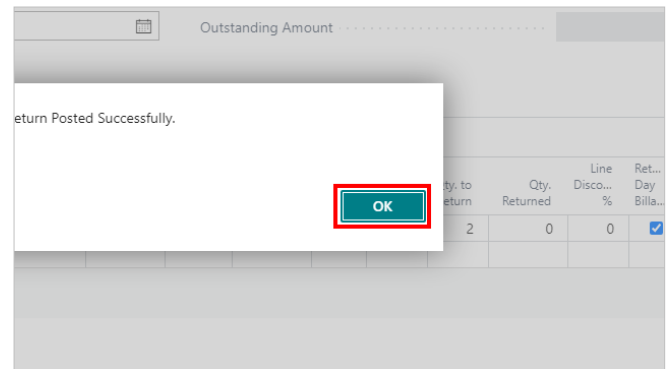
Click on the navigation menu item **Return Rentals**

The screenshot shows the 'Rental Contract · RC00025' page in Dynamics 365 Business Central. The 'Return Rentals' menu item is highlighted with a red box.

Click on the button **Yes**

The screenshot shows a confirmation dialog box in Dynamics 365 Business Central. The dialog box has a question mark icon and the text 'Are you sure you want to Return this rental contract?'. There are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.

Click on the button **OK**



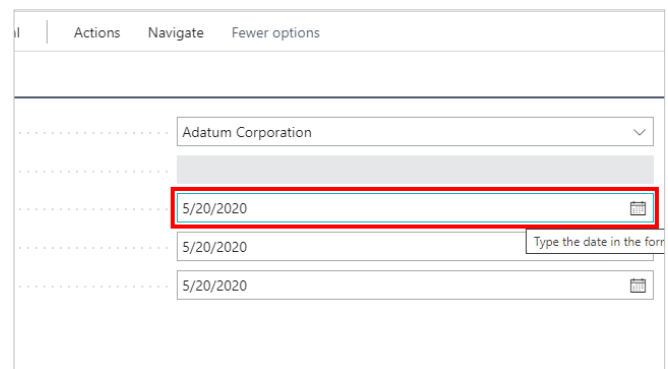
Return Posted Successfully.

OK

3.21.4.3. Returning a Unit Linked to an Item Stored in Bins to a Different Location

The following demonstrates the returning of a Rental Unit which is linked to an Item stored in bins, to a different rental location, which has Bin Mandatory enabled.

Click on the field **Posting Date**



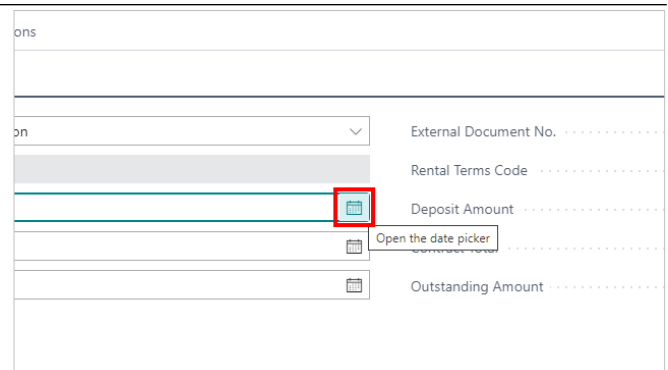
Adatum Corporation

5/20/2020

5/20/2020

5/20/2020

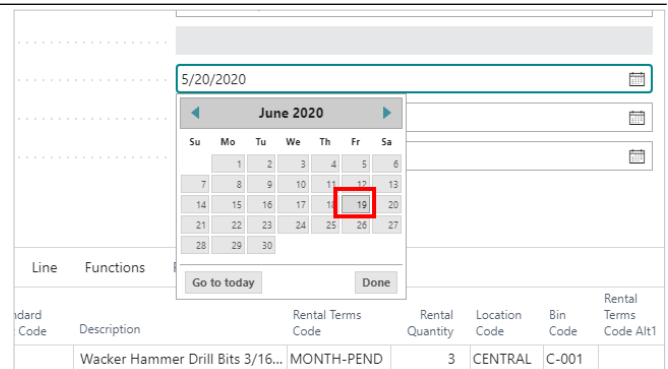
Click on the link **Open the date picker**



Open the date picker

Click on a date in the calendar

Select the date that the rental unit/items were returned on.



5/20/2020

June 2020

19

Go to today Done

Standard Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1
	Wacker Hammer Drill Bits 3/16...	MONTH-PEND	3	CENTRAL	C-001	



ODT Rentals Online Help

Click on the cell **Location Code** with the value **CENTRAL**

The Rental Unit was shipped from the Central rental location.

Fewer options							
	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
immer Drill Bits 3/16...	MONTH-PEND	3	CENTRAL	C-001			5/20/2020
				Look up value			

Click on the cell **Bin Code** with the value **C-001**

The Items were shipped from the Central location from the C-001 Bin.

options							
	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Bits 3/16...	MONTH-PEND	3	CENT	C-001			5/20/2020
				Look up value			

Click on the cell **Qty. to Return** with the value **0**

ons									
Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.
0.00		SUPPLIES	0	3	0	0	0	<input checked="" type="checkbox"/>	1049

Enter the text **3**.

ons									
Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.
0.00		SUPPLIES	0	3	3	0	0	<input checked="" type="checkbox"/>	1049



ODT Rentals Online Help

Click on the cell **Return Location Code**

Qty. ned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Departm Code
0	0	<input checked="" type="checkbox"/>	1049			C-001		

Click on the link in cell **Code** with the value **SOUTH**

Select the location the unit/items have been returned to.

Code	Name
→ CENTRAL	Central Warehouse
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location
WEST	West Warehouse
+ New	

Click on the cell **Return Bin Code**

Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Department Code	Custm Code
0	<input checked="" type="checkbox"/>	1049	SOUTH				

Click on the lookup button in the cell **Return Bin Code**

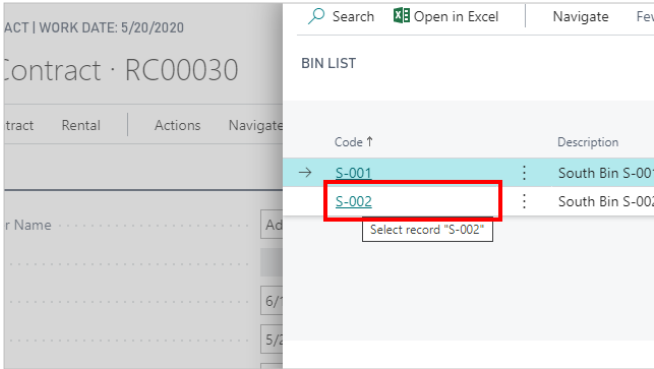
Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Department Code	Custm Code
<input checked="" type="checkbox"/>	1049		SOUTH				



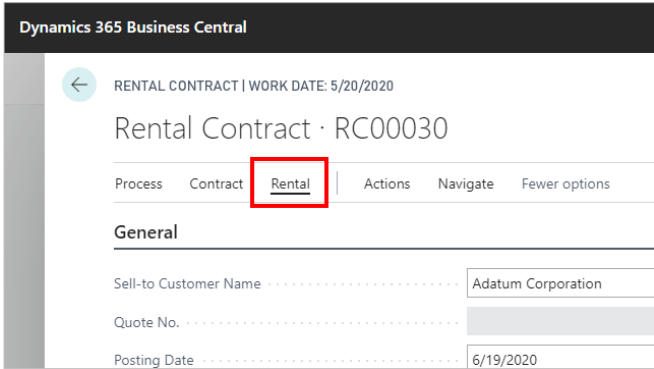
ODT Rentals Online Help

Click on the link in cell **Code** with the value **S-002**

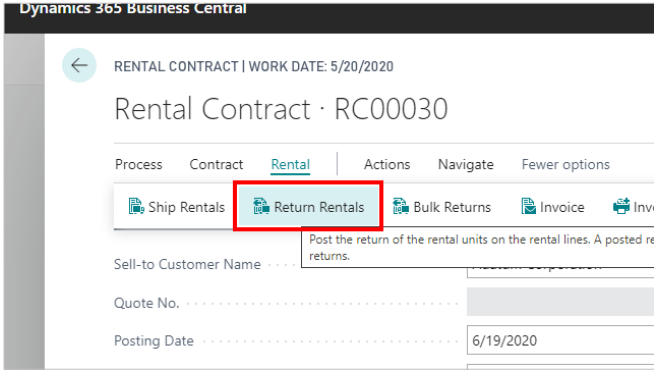
Select the Bin Code that the items were returned to in the selected location.



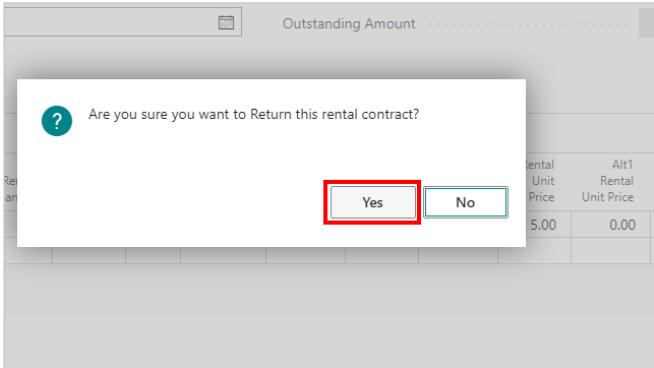
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Return Rentals**



Click on the button **Yes**





Click on the button **OK**

Return Posted Successfully.

OK

3.21.4.4. Returning a Unit Linked to an Item Stored in Bins to a Temporary Location

The following demonstrates the returning of a Rental Unit which is linked to an Item stored in bins, to a temporary rental location.

When returned to a temporary location, the items are not returned to a bin.

Click on the cell **Location Code** with the value **CENTRAL**

The Rental Unit was shipped from the Central rental location.

Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Immer Drill Bits 3/16...	MONTH-PEND	2	CENTRAL	C-002		5/20/2020

Look up value

Click on the cell **Bin Code** with the value **C-002**

The Items were shipped from the Central location from the C-002 Bin.

Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
Bits 3/16...	MONTH-PEND	2	CENT	C-002		5/20/2020	6/19/2020

Click on the cell **Rental Return Date** with the value **6/19/2020**

Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
AL	C-002					5/20/2020	6/19/2020	5.00	0.00	0.00

Type the date in the format M/d/yyyy

As the Rental Units are being returned on the Rental Return Date the Posting Date must be changed to be the same date.



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Navigate Fewer options

Trey Research

5/20/2020

5/20/2020 Type the date in the format M/d/yyyy

5/20/2020

Click on the link **Open the date picker**

ons

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Open the date picker

Click on the link **Next**

Trey Research

5/20/2020

May 2020

Next

Functions

Click on a date in the calendar

Select the date that the rental unit/items were returned on.

5/20/2020

June 2020

Go to today Done

Standard Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1
	Wacker Hammer Drill Bits 3/16...	MONTH-PEND	2	CENTRAL	C-002	



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Alt1 Rental it Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qt Returns
0.00	0.00		SUPPLIES	0	2	0	

Enter the text **2**.

Alt1 Rental it Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qt Returns
0.00	0.00		SUPPLIES	0	2	2	

Click on the cell **Return Location Code**

Qty. ned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Departm Code
0	5	<input checked="" type="checkbox"/>	1050			C-002		

Click on the link in cell **Code** with the value **TEMP**

Code ↑	Name
→ CENTRAL	Central Warehouse
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location

it Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	+	New	0.00	0
0.00	*					



ODT Rentals Online Help

Click on the cell **Return Bin Code**

Notice that the Bin Code field is automatically cleared and cannot be modified.
This is as the temporary location does not allow for bins.

Ret...	Ret...	ODT	Partial	Return	Return	Return Temporary	Department	Cust...
Day	Day	Transfer	Return	Location	Bin	Location	Code	Code
%	%	Order No.	Date	Code	Code			
5		1050		TEMP		Joes Machine Shop		

Click on the cell **Return Temporary Location**

When the temporary location code is selected, the Return Temporary Location field becomes editable and it is mandatory that a description of the location be entered.

ODT	Partial	Return	Return	Return Temporary	Department	Customergro...
Transfer	Return	Location	Bin	Location	Code	Code
Order No.	Date	Code	Code			
1050		TEMP				

Enter the text **Joes Machine Shop**.

Enter a description of the temporary location the unit/items have been returned to.

ODT	Partial	Return	Return	Return Temporary	Department	Customergro...
Transfer	Return	Location	Bin	Location	Code	Code
Order No.	Date	Code	Code			
1050		TEMP				

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00031 | WORK DATE: 5/20/2020

Rental Contract · RC00031

ProcessContractRentalActionsNavigateFewer options

General

Sell-to Customer Name

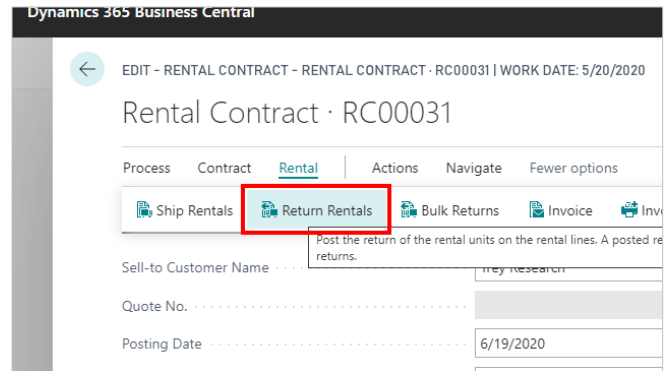
Trey Research

Quote No.

Posting Date

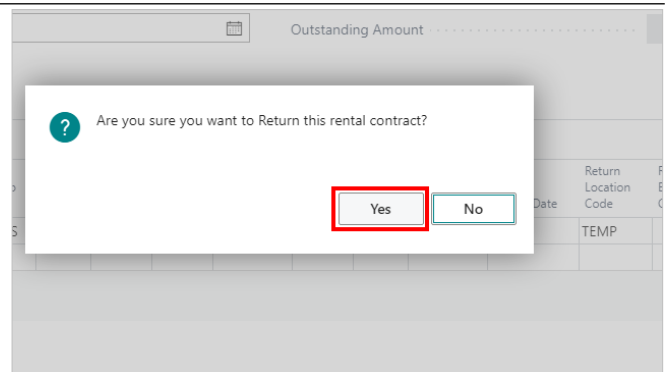
6/19/2020

Click on the navigation menu item **Return Rentals**



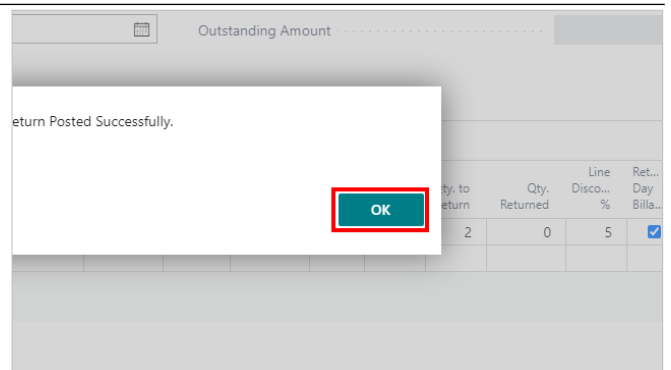
The screenshot shows the 'Rental Contract · RC00031' screen in Dynamics 365 Business Central. The 'Rental' tab is selected in the top navigation bar. Below the tabs, there are several action buttons: 'Ship Rentals', 'Return Rentals', 'Bulk Returns', 'Invoice', and 'Inv'. The 'Return Rentals' button is highlighted with a red box. A tooltip is visible over the 'Return Rentals' button, stating: 'Post the return of the rental units on the rental lines. A posted return.' Below the buttons, there are fields for 'Sell-to Customer Name', 'Quote No.', and 'Posting Date' (6/19/2020).

Click on the button **Yes**



The screenshot shows a confirmation dialog box with the text: 'Are you sure you want to Return this rental contract?'. There are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.

Click on the button **OK**



The screenshot shows a success message dialog box with the text: 'Return Posted Successfully.'. There is an 'OK' button highlighted with a red box.

3.21.5. How to Return Units to a Different Location Using Bulk Returns

3.21.5.1. Overview

The Bulk Returns feature contains the options to return multiple Rental Units to a different or temporary rental location.

3.21.5.2. How to Return Units to a Different Location Using Bulk Returns

The following example demonstrates the returning of multiple Rental Units to a different location from the Rental Contract.

On the contract 2 of the 3 Rental Units will be returned to a different rental location.

The same settings on the Bulk Return page can be used to return multiple units to a different rental location from the To Return list.



ODT Rentals Online Help

Click on the cell **Rental Unit No.** with the value **RU00008-001**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.		Standard Text Code	Description	Rental Terms Code			
RU00008			18 G Brad Nailers Group	MONTH-PE			
RU00008-001			18 G Brad Nailer	MONTH-PE			
RU00008-002			18 G Brad Nailer	MONTH-PE			
→ RU00008-003			18 G Brad Nailer	MONTH-PE			

Press and hold the **Ctrl** key down.
Click on the cell **Rental Unit No.** with the value **RU00008-003**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.		Standard Text Code	Description	Rental Terms Code			
RU00008			18 G Brad Nailers Group	MONTH-PE			
→ RU00008-001			18 G Brad Nailer	MONTH-PE			
RU00008-002			18 G Brad Nailer	MONTH-PE			
RU00008-003			18 G Brad Nailer	MONTH-PE			

Sales Lines				Manage	Line	Fewer options
-------------	--	--	--	--------	------	---------------

Click on the navigation menu item popup **Functions**

Posting Date	5/5/2020
Order Date	5/5/2020
Document Date	5/5/2020

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.		Standard Text Code	Description	Rental Terms Code			
RU00008			18 G Brad Nailers Group	MONTH-PE			
RU00008-001			18 G Brad Nailer	MONTH-PE			
RU00008-002			18 G Brad Nailer	MONTH-PE			

Click on the navigation menu item **Bulk Returns**

Contract Total		
Outstanding Amount		

ntal PO(s)		Open Sub Rental Purchase Order	Bulk Returns
------------	--	--------------------------------	--------------

Updates Qty. To Return for all rental lines							
TH-PEND	3	EAST				5/5/2020	6/4/2020 150.00
TH-PEND	1	EAST				5/5/2020	6/4/2020 150.00
TH-PEND	1	EAST				5/5/2020	6/4/2020 150.00
TH-PEND	1	EAST				5/5/2020	6/4/2020 150.00



Click on the field **Location Code**

ODT BULK RETURN

Option

Update Return Date ☐

Return Date

Location Code

Return Temporary Location Look up value

Return Bin Code

Click on the link in cell **Code** with the value **WEST**

Return Temporary Location

Return Bin Code

Code	Name
EAST	East Warehouse
RENTRESERV	Inventory Items Rental Rese
SOUTH	South Warehouse
TEMP	Temporary Location
WEST	West Warehouse

+ New Select record "WEST"

Click on the button **OK**

Location Code

Return Temporary Location

Return Bin Code

Schedule... OK Cancel

Click on the cell **Return Location Code** with the value **WEST**

Note that the lines selected automatically had the Return Location Code field populated with the location selected on the Bulk Return page.

Qty. ned	Line Disco... %	Ret... Day Billa...	ODT Transfer Order No.	Partial Return Date	Return Location Code	Return Bin Code	Return Temporary Location	Departm Code
0	0	<input checked="" type="checkbox"/>	-		WEST			
0	0	<input checked="" type="checkbox"/>	-		WEST	WEST		
0	0	<input checked="" type="checkbox"/>	-		WEST			
0	0	<input checked="" type="checkbox"/>	-		WEST			



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

5/5/2020

5/5/2020

5/5/2020

Type the date in the format

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Outstanding Amount

Open the date picker

Click on the link **Next**

Adatum Corporation

5/5/2020

May 2020

Next

Functions

Click on a date in the calendar

Select the date the unit was actually returned on. In this example, select the same date as the Rental Return Date.

Adatum Corporation

5/5/2020

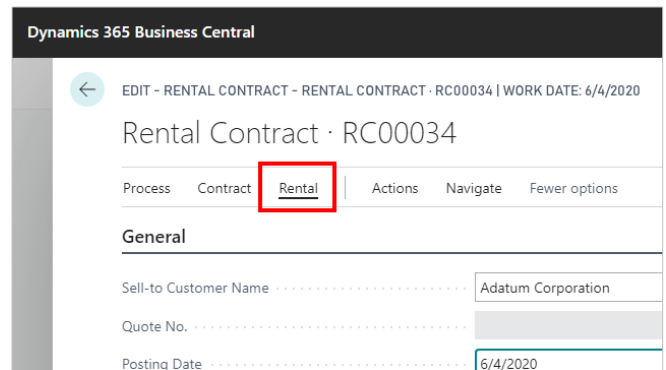
June 2020

Go to today

Done

Rental Return Date	Rental Unit Price	Rental Unit Price	Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00034 | WORK DATE: 6/4/2020

Rental Contract · RC00034

Process Contract **Rental** Actions Navigate Fewer options

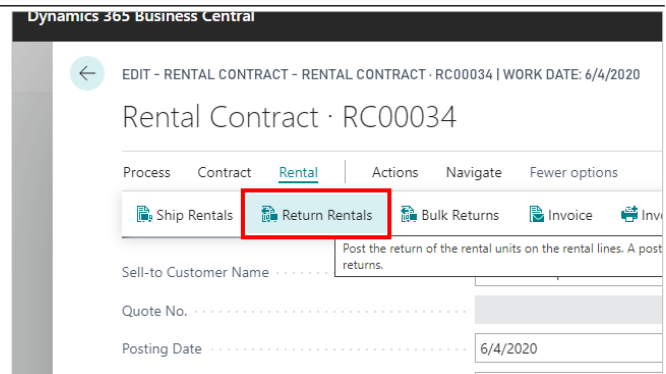
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/4/2020

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00034 | WORK DATE: 6/4/2020

Rental Contract · RC00034

Process Contract Rental Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice Inv

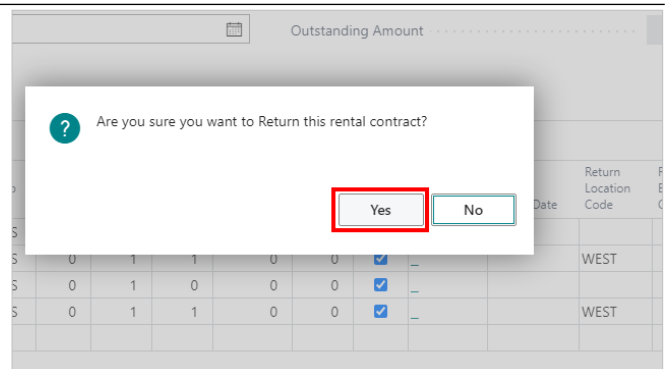
Post the return of the rental units on the rental lines. A post returns.

Sell-to Customer Name

Quote No.

Posting Date 6/4/2020

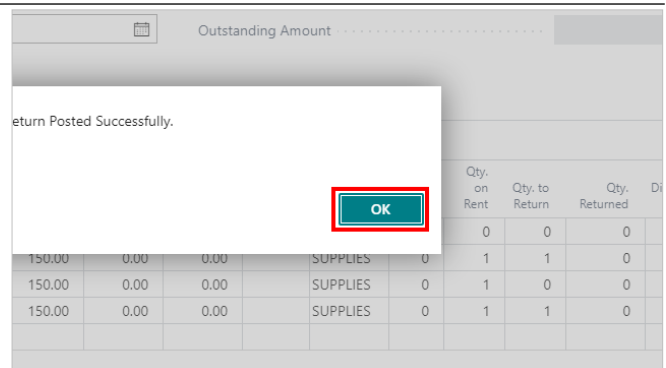
Click on the button **Yes**



Are you sure you want to Return this rental contract?

Yes No

Click on the button **OK**



Return Posted Successfully.

OK

3.22.Undo Rental Returns

3.22.1. Undo Rental Returns Overview

The Undo Return functionality provides the ability to undo a rental return directly from an open Rental Contract. Should the contract be completed, then the Rental Contract must be re-opened to run the Undo Return.

When on a selected rental line and the Undo Return is run, the Rental Unit on the line is automatically shipped. A Posted Delivery document is created for the shipment and a Rental Ledger Entry is created with the Type of Rental. In the Rental Ledger Entries, the Correction field will be checked on the initial Rental and Return

records.

If a Rental Unit was returned to a different Rental Location than shipped from and Undo Return is run, then by default the Location Code on the Rental Line will be changed to the location the unit was returned to.

The Return Location code on the Rental Line will still contain the initial Return Location Code, so when the Rental Unit is returned in the future and the unit is not to be returned to that location, then the Return Location Code will need to be modified.

There are conditions related to the process of undoing a return of a Rental Unit.

- The unit must be available to rent out in the location it was returned to.
- When a unit is linked to an item there must be at least the same item quantity available for rental in the location the unit was returned to.
- Should the item returned be stored in a Bin, then there must be at least the same quantity available for rent in that Bin equal or greater than was returned to process the Undo Return.
- When a unit linked to an item with Serial No. Tracking was returned, then that item with that Serial No. that was return must be available to rent.
- When linked to an item with Lot Tracking there must be at least the same quantity returned available in the Lot.

There are return scenario restrictions where undoing a return is not allowed which include:

- Units returned using the Rental Swap or Rental Exchange
- Units returned when using the Transfer Contract feature
- When an Advanced Proforma Invoice was created, whether open or posted.

IMPORTANT NOTE:

In Release 8.1 there is a known issue with Rental Packages with price allocation. When the Undo Return is run on a component rental line and there are other components that have been returned, then all return is being processed on all units when the undo return should only occur on the selected Rental Unit line.

3.22.2. How to Undo Rental Unit Returns

3.22.2.1. Overview

In this example the undoing of the return will encompass:

- A Rental Unit which is not assigned to a rental group nor is linked to another master record and is not available to rent out.
- A Rental Unit which is assigned to a rental group.

On a Rental Contract for April 12 to June 11 a unit not assigned to a group and a unit in a group were returned on April 30 when they should not have been returned.

In the example, the Undo Return will be ran on each of these units.

To show the error that will occur if a unit is not available to rent out, the unit not assigned to the group was entered on another Rental Contract for May 5 to June 4 after it was returned.

3.22.2.2. How to Undo the Return of a Rental Unit

The following shows the undoing of a return where the unit is available to rent out.



ODT Rentals Online Help

Click on the cell **Rental Unit No.** with the value **RU00011-001**

Rental Lines				Manage	Line	Functions
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code			
RU00007	MONTH-PEND	1	EAST			
RU00011	MONTH-PEND	2	EAST			
→ RU00011-001	MONTH-PEND	1	EAST			
RU00011-003	MONTH-PEND	1	EAST			

Sales Lines				Manage	Line	Fewer options
-------------	--	--	--	--------	------	---------------

Click on the cell **Rental Return Date** with the value **4/30/2021**

Fewer options				
Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date
		4/12/2021		4/30/2021
		4/12/2021		6/11/2021
		4/12/2021		4/30/2021
		4/12/2021		6/11/2021

Click on the navigation menu item popup **Functions**

Posting Date	4/30/2021	Contract Total	
Order Date	4/12/2021	Outstanding Amount	
Document Date	4/30/2021	Advanced Proforma	
External Document No.			

Rental Lines				Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2			
RU00007	MONTH-PEND	1	EAST					4/
RU00011	MONTH-PEND	2	EAST					4/
→ RU00011-001	MONTH-PEND	1	EAST					4/

Click on the navigation menu item **Undo Return**

Document Date	4/30/2021
External Document No.	

Rental Lines				Manage	Line	Function
						Undo Shipment
						Undo Return
						Rental Swap
						Create Sub Line

Rental Lines				Manage	Line	Function
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	
RU00007	MONTH-PEND	1	EAST			
RU00011	MONTH-PEND	2	EAST			
→ RU00011-001	MONTH-PEND	1	EAST			
RU00011-003	MONTH-PEND	1	EAST			

ODT Rentals Online Help

Click on the button **Yes**

A screenshot of the 'Advanced Proforma' dialog box. At the top, there is a date field showing '4/30/2021' and a calendar icon. Below this is a text input field. The main content area contains a question: 'Are you sure you want to undo return for the selected rental contract line?'. To the left of the question is a question mark icon. At the bottom right, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red rectangular border. The background shows a table with columns for 'MONTH-PEND', 'ID', 'EAST', 'DATE', and 'Rental Return Date'. The table contains four rows of data.

Click on the button **OK**

Undo Return Posted Successfully.

OK

	of	Rental	Re Bi D.
		Return Date	
VD	1 EAST	4/12/2021	4/30/2021 4/
VD	2 EAST	4/12/2021	6/11/2021 4/
VD	1 EAST	4/12/2021	4/30/2021 4/
VD	1 EAST	4/12/2021	6/11/2021 4/

Click on the cell **Rental Return Date** with the value **4/30/2021**

When the return of the unit is undone, the Rental Return Date and Rental Billing End Date are not updated.

To include this unit in subsequent invoicing the Rental Return Date must be updated which will update the Rental Billing End Date.

Rental Lines	Manage	Line	Functions	Related	Fewer options	
Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Replaced By
RU00007	4/12/2021		4/30/2021	4/12/2021	4/30/2021	
RU00011	4/12/2021		6/11/2021	4/12/2021	6/11/2021	
→ RU00011-001	4/12/2021		4/30/2021	4/12/2021	4/30/2021	
RU00011-003	4/12/2021		6/11/2021	4/12/2021	6/11/2021	

Click on the cell **Qty. on Rent** with the value **1**

Note that the Qty. on Rent is populated after the process is ran and the Qty. Returned is re-set to 0.

Manage	Line	Functions	Related	Fewer options						
	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Return Location Code	Line Disco... %	
	0.00		SUPPLIES	0	0	0	1			0
	0.00		SUPPLIES	0	0	0	0			0
⋮	0.00		SUPPLIES	0	1	0	0			0
	0.00		SUPPLIES	0	1	0	0			0

Click on the navigation menu item popup **Line**

Posting Date 4/30/2021 Contract Total :
 Order Date 4/12/2021 Outstanding Am
 Document Date 4/30/2021 Advanced Profo
 External Document No. :

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent
RU00007	0.00		SUPPLIES	0	0
RU00011	0.00		SUPPLIES	0	0
→ RU00011-001	0.00		SUPPLIES	0	1

Click on the navigation menu item **Rental Ledger Entries**

Document Date 4/30/2021
 External Document No. :

Rental Lines | Manage | **Line** | Function

Rental Amount Lines | View Rental Calen
Rental Ledger Entries | Metered Usage E
 Rental Value | View the rental ledger entries for the

→ RU00011-001	0.00	SUPP
RU00011-003	0.00	SUPP

Click on the cell **Posting Date** with the value **4/12/2021**

Note that the Rental Ledger Entries contain a new entry with the Entry Type of Rental and that the Posting Date is the same as the initial entry with the type of Rental.

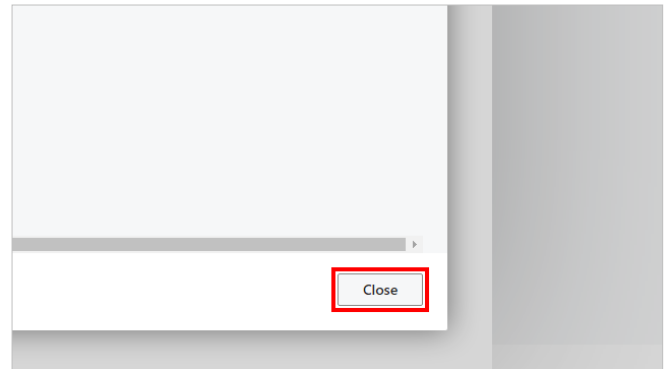
Posting Date	Customer No.	Customer Name	Entry Type	No.
4/12/2021	10000	Adatum Corporation	Rental	RU00011
4/30/2021	10000	Adatum Corporation	Return	RU00011
4/12/2021	10000	Adatum Corporation	Rental	RU00011

Click on the cell **Correction** with the value **on**

Note that the first 2 entries, Rental and Return have the Correction field checked.

Rental Doc. No. ↑	Rental Contract No.	Entry No.	Corr...
RC00004	RC00004	32	<input checked="" type="checkbox"/>
RC00004	RC00004	35	<input checked="" type="checkbox"/>
RC00004	RC00004	36	<input type="checkbox"/>

Click on the button **Close**



The following shows the undoing of a return where the unit is not available to rent out to provide an example of the error that will occur, which disallows the undo return of the unit.

Click on the cell **Rental Unit No.** with the value **RU00007**

External Document No. <input type="text"/>				
Rental Lines | Manage | Line | Functions				
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Unit Code
→ RU00007	MONTH-PEND	1		EA
RU00011	MONTH-PEND	2		EA
RU00011-001	MONTH-PEND	1		EA
RU00011-003	MONTH-PEND	1		EA

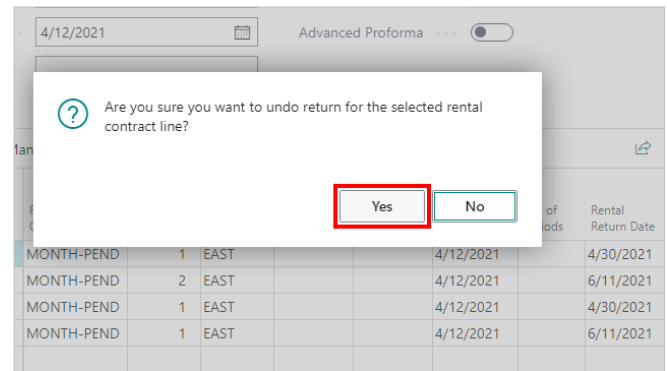
Click on the navigation menu item popup **Functions**

Posting Date	4/12/2021	Contract Total	
Order Date	4/12/2021	Outstanding Amount	
Document Date	4/12/2021	Advanced Proforma	
External Document No. <input type="text"/>			
Rental Lines | Manage | Line | Functions | Related | Fewer options			
Rental Unit No.	Rental Terms Code	Rental Quantity	Rental Location Code
→ RU00007	MONTH-PEND	1	EAST
RU00011	MONTH-PEND	2	EAST
RU00011-001	MONTH-PEND	1	EAST

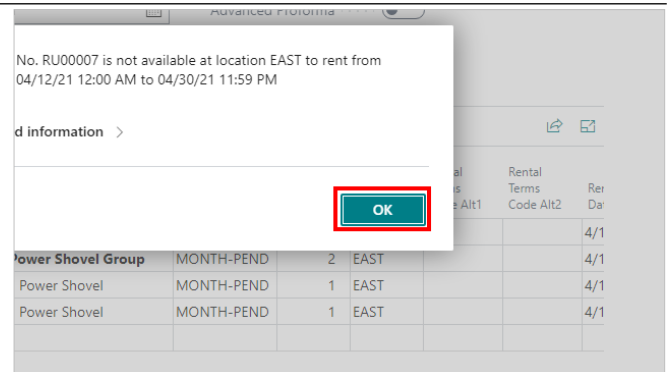
Click on the navigation menu item **Undo Return**

Document Date	4/12/2021
External Document No. <input type="text"/>	
Rental Lines | Manage | Line | Functions	
Undo Shipment	Rental Swap
Undo Return	Create Sub Line
Rental Unit No.	Rental Terms Code
RU00007	MONTH-PEND
RU00011	MONTH-PEND
RU00011-001	MONTH-PEND
RU00011-003	MONTH-PEND

Click on the button **Yes**



Click on the button **OK**



3.23.Rental Document Pictures

3.23.1. Taking Pictures on Rental Documents Overview

3.23.1.1. Overview

ODT Rentals provides the ability to take or import pictures on the Posted Rental Delivery and Posted Rental Return documents. The feature includes the ability to take multiple pictures for the document itself and per rental line.

Pictures can be taken from a cell phone, tablet, laptop, or any mobile devices that has a camera and has the Business Central and ODT Rentals installed. The pictures will be automatically saved and displayed on the documents.

When taking pictures, they can be automatically saved in the database, in SharePoint or on OneDrive. When saved to SharePoint or OneDrive the pictures on the documents are linked to the related picture in the folder the pictures have been saved in.

IMPORTANT:

The setup and configuration for the saving of the pictures to an online drive of SharePoint or OneDrive is complex and should only be attempted by knowledgeable personnel with administrative access on the organizations' network, Business Central, and OneDrive or SharePoint. Assistance is available from Opendoor.

3.23.1.2. Rental Documents Overview

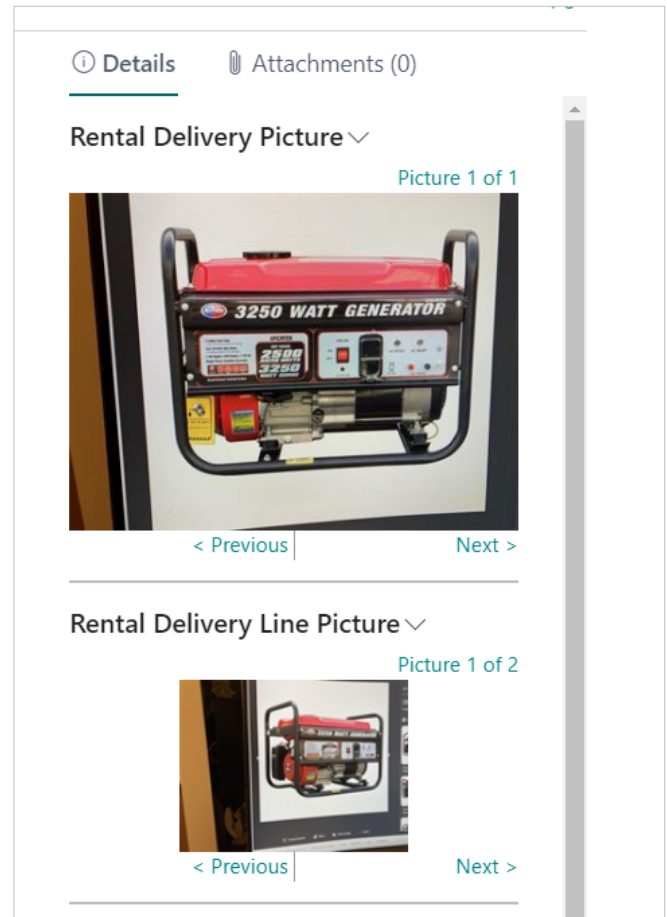
Two factbox's have been added to the documents for the taking of pictures or importing them and displaying the pictures of the rental product when delivered and when returned.

One for pictures linked to the document header and one for pictures that are linked to the Rental Line the cursor is on.

On the Posted Rental Delivery document, the factbox for taking picture to be linked to the header is called Rental Delivery Picture, and the factbox for taking pictures to be linked to the selected rental line is called Rental Delivery Line Picture.

On the Posted Rental Return document, the factbox for taking picture to be linked to the header is called Rental Return Picture, and the factbox for taking pictures to be linked to the selected rental line is called Rental Return Line Picture.

Fact Boxes Example from a Posted Rental Delivery Document



When there is more than one picture the user can easily view other pictures by selecting Previous and Next in the fact boxes.

When pointing to the title in each fact box the following menu options include:

- **Take** for taking pictures.
- **Import** for importing pictures.
- **Export** for exporting pictures.
- **Delete** for deleting pictures.
- **Next Image** to view the next picture if there is more than one picture.
- **Previous Image** to view the previous picture if there is more than one picture.

Each of the fact boxes provide the ability to view all the pictures linked to the document header or the selected Rental Line by selecting the link Picture x of y, with x being the number of the picture and y being the number of pictures linked to the fact box.

For the Rental Delivery Picture or Rental Return Picture fact box, in the Rental Pictures gallery each picture contains the Document No. of the Posted Rental Delivery or Posted Rental Return followed by the number of the picture starting with 1.

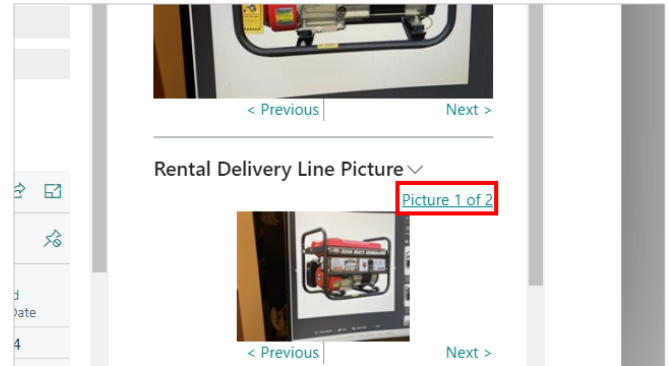
For example, the numbers of the pictures in a Posted Rental Delivery Document RD0000 would be numbered as RD00001 1, RD00001 2.

For the Rental Delivery Line Picture fact box, in the Rental Pictures gallery each picture contains the Document No. of the Posted Rental Delivery or Posted Rental Return followed by the rental line number and then followed

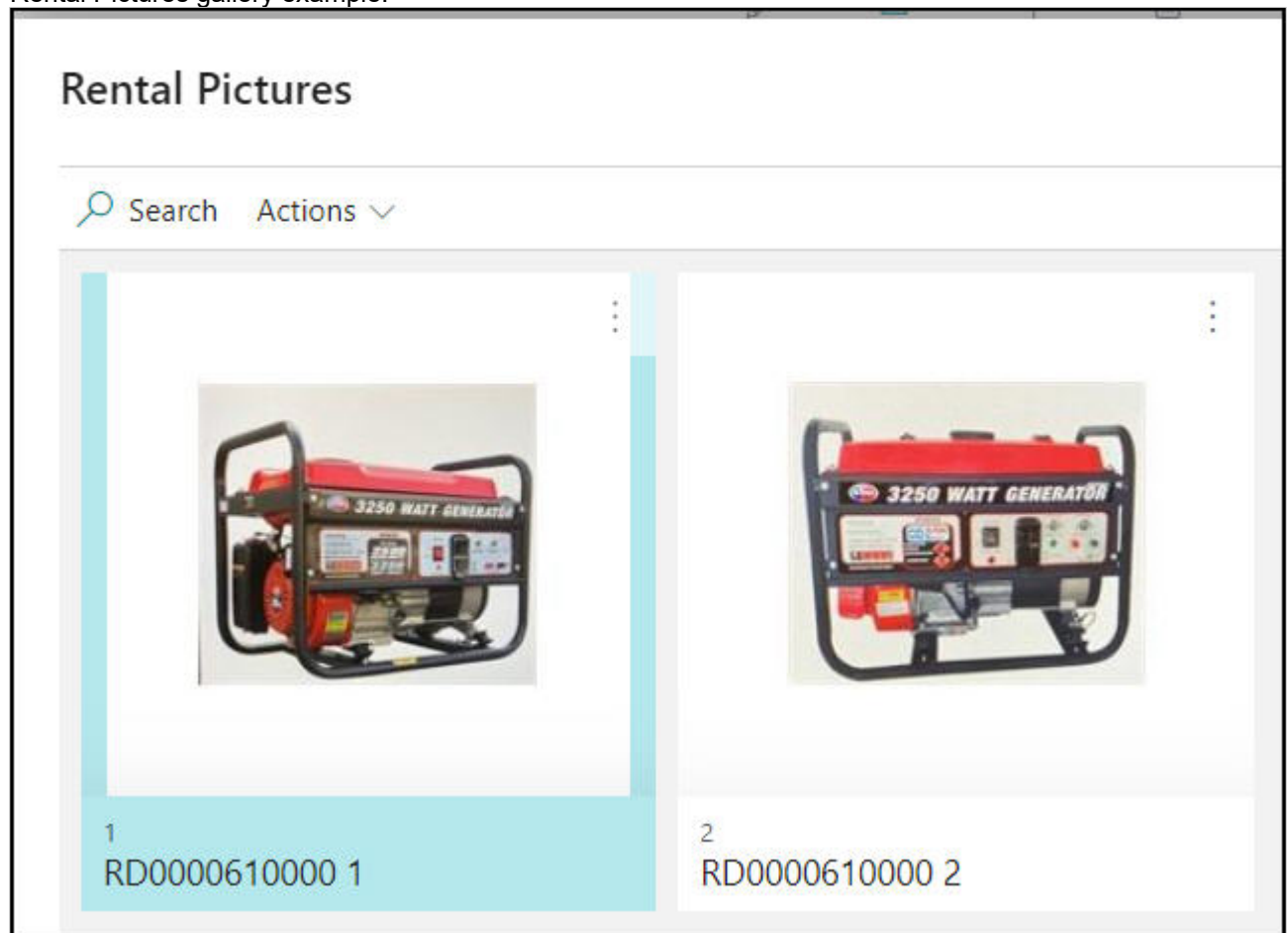
by the number of the picture starting with 1.

For example, if you take 2 pictures on a Posted Rental Delivery document with the number RD00006 for the first Rental Line which has a line no. of 10000, then the picture numbers would be RD0000610000 1 and RD0000610000 2.

Click on the field **Picture 1 of 2**



Rental Pictures gallery example.



The Rental Pictures gallery page provides the following Actions menu options:

- **Export**, for exporting the selected picture.
- **Picture Info** displays the Format, Size Width and Height of the picture.
- **Resize Picture to Thumbnail**, for resizing the picture and contains the options of Small, Medium, and Large.
- **Send and Open in OneDrive**, which would only be used if saving imported pictures to SharePoint or OneDrive per the setup instead of being taken from a cell phone, tablet, laptop, or any mobile devices that

has camera. **NOTE:** The menu option name is being changed in the upcoming release to be Send to Online Drive.

- **Rotate Picture**, which will rotate the picture to the desired orientation.

3.23.1.3. Planning for the Storage of the Pictures

Decide whether the pictures are to be saved in the database, SharePoint, or OneDrive.

NOTE:

It is recommended that SharePoint be used as the site is shared with other users and can be managed by your IT Team, including the security and access on the SharePoint drive.

If choosing to have the pictures saved in the database, over time the pictures will use a lot of space in the database.

If selecting to use OneDrive it will be the drive of the individual who sets up the ONLINEDRIVE External Connector - OneDrive in Rentals and will require that the user setup and maintain the appropriate security permissions on the drive, which could pose a problem if the individual leaves the company.

Determine the folder structure for the filing of the pictures. This information is needed when setting up the folder or folders in SharePoint or OneDrive.

Determine which individual(s) will be completing the required setups including SharePoint or OneDrive, the Entra ID App Registration and the External Connector for the Online Drive, and the Online Drive folder mapping in ODT Rentals.

Whether you are using SharePoint or OneDrive, it is advisable to create a dedicated service account to configure the integration.

If you use an individuals' account, the integration may stop working if such accounts get blocked/deleted (i.e., when the individual leaves the organization).

NOTE:

The dedicated service account must have the appropriate security permissions and access to:

- Entra ID (aka Azure AD) portal to create and configure the Entra ID App Registration.
- Setup the online folders and assign the appropriate permissions on the folders on SharePoint or OneDrive for the users to view the pictures in the fact boxes on the rental documents.
- Business Central for configuring the External Connector and Online Drive mapping.

3.23.2. Taking Pictures Setup Overview

3.23.2.1. Overview

The setup for taking pictures is dependent on the decision as to where the pictures are to be saved.

If the pictures are to be saved in the database there are no setups to be done.

If the pictures are to be saved to SharePoint or OneDrive, then the following setups are required.

- Setup the folder structure in SharePoint or OneDrive as decided in the planning stage.
- Create and Configure an Entra ID App Registration.
- Setup an External Connector for ONLINEDRIVE with configuration to the folder drive of SharePoint or OneDrive as decided in the planning stage.
- Rental Management Setup, Rental Picture tab must be configured.

IMPORTANT NOTE:

If your organization has multiple companies in the database, then the following will need to be done in for/in each company.

- Setup the folder structure in SharePoint or OneDrive as decided when planning the folder structure.
- Setup an External Connector for ONLINEDRIVE with configuration to the folder drive of SharePoint or OneDrive decided in the planning stage.
- Configuration of the Rental Management Setup, Rental Picture tab.

3.23.2.2. Setup SharePoint or OneDrive folder(s) and Permissions

Setup the folder and sub-folder(s), as applicable, for SharePoint or OneDrive where the picture files are to be saved to.

NOTE:

The destination folder must be saved as a drive.

If your organization is going to use SharePoint:

- Log in into SharePoint using your Azure account.
- On your organizations' SharePoint site select or create a site to be used for the storage of the pictures.
- Under the root folder, Documents, add the folder and sub-folder(s), if applicable, for where the picture files will be saved to. The folder path where the files are to be saved to will be needed when setting up the External Connector, ONLINEDRIVE for SharePoint for the pictures.

SharePoint Folder Structure example: Documents/Business Central/ Rental Pictures

NOTE:

If your organization has multiple companies, then we recommend that a folder be created for each company above the folder drive where the pictures are to be saved to.

SharePoint Folder Structure example: Documents/Business Central/company name/Rental Pictures

If your organization is going to use OneDrive:

- Log in into OneDrive using the dedicated service account. This must be the user who will be setting up the External Connector, ONLINEDRIVE for OneDrive.
- On the OneDrive under the root drive OneDrive, add the folder and sub-folder(s), if applicable, for where the pictures will be saved to. The folder path where the files are to be saved to will be needed when setting up the External Connector, ONLINEDRIVE for OneDrive.
- Assign the appropriate permissions for users who have access to the Posted Rentals Delivery and Posted Rental Return documents and will need to be able to view the pictures in the fact boxes.

Folder Structure example: OneDrive/Business Central/Pictures Archived

NOTE:

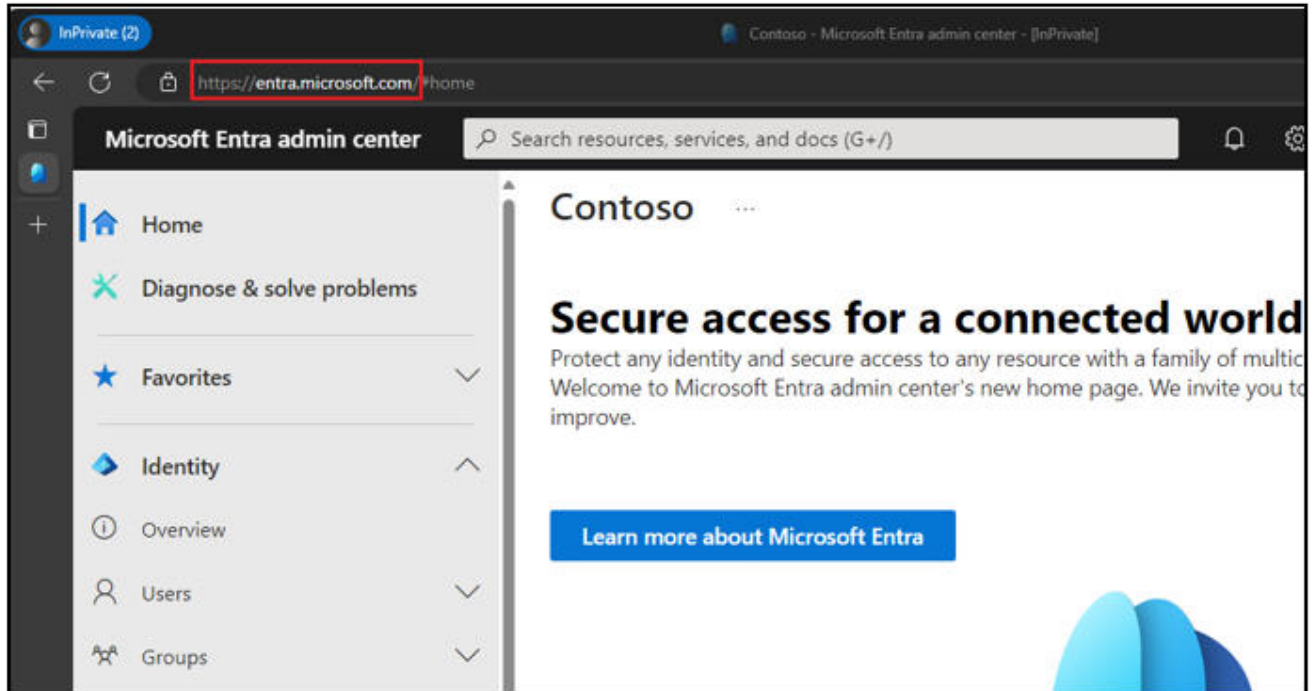
If your organization has multiple companies, then we recommend that a folder be created for each company above the destination folder drive where the pictures are to be saved to.

OneDrive Folder Structure example: OneDrive/Business Central/company name/Pictures Archived

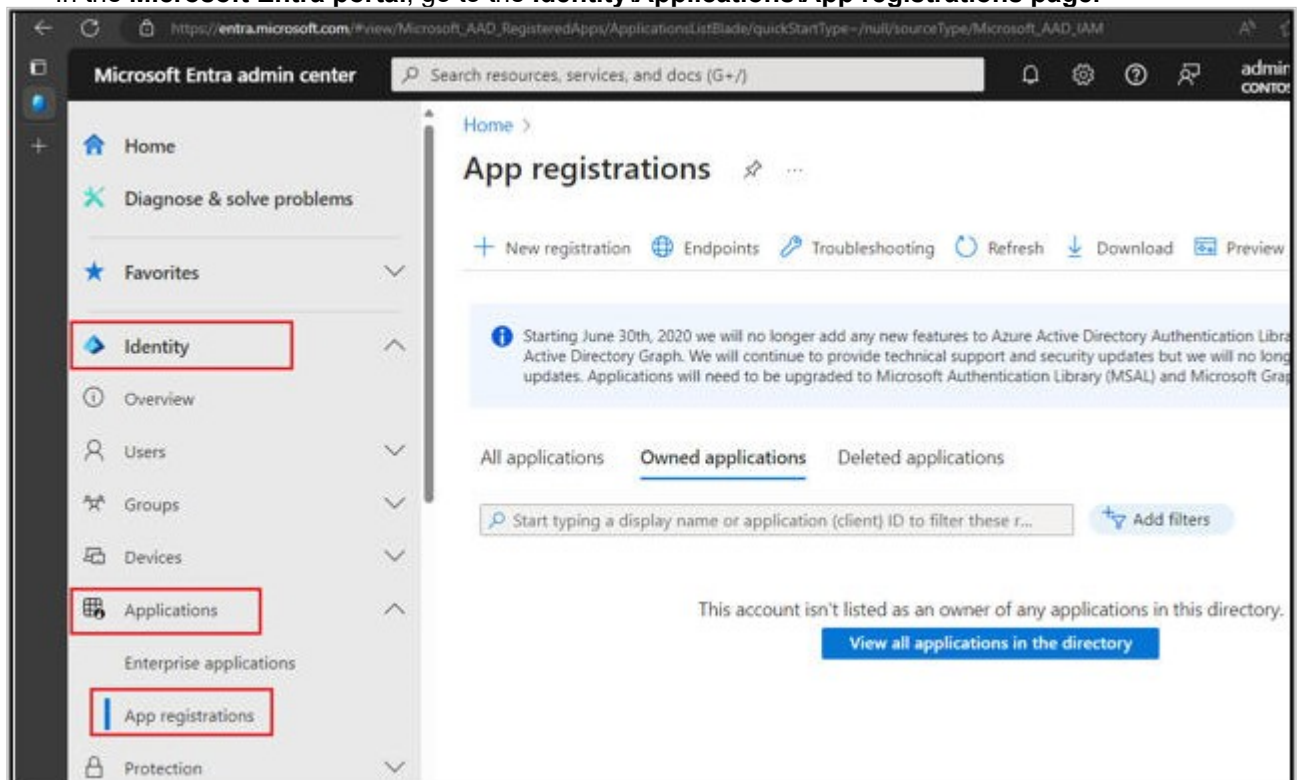
3.23.3. How to Create and Configure an Entra ID App

Registration

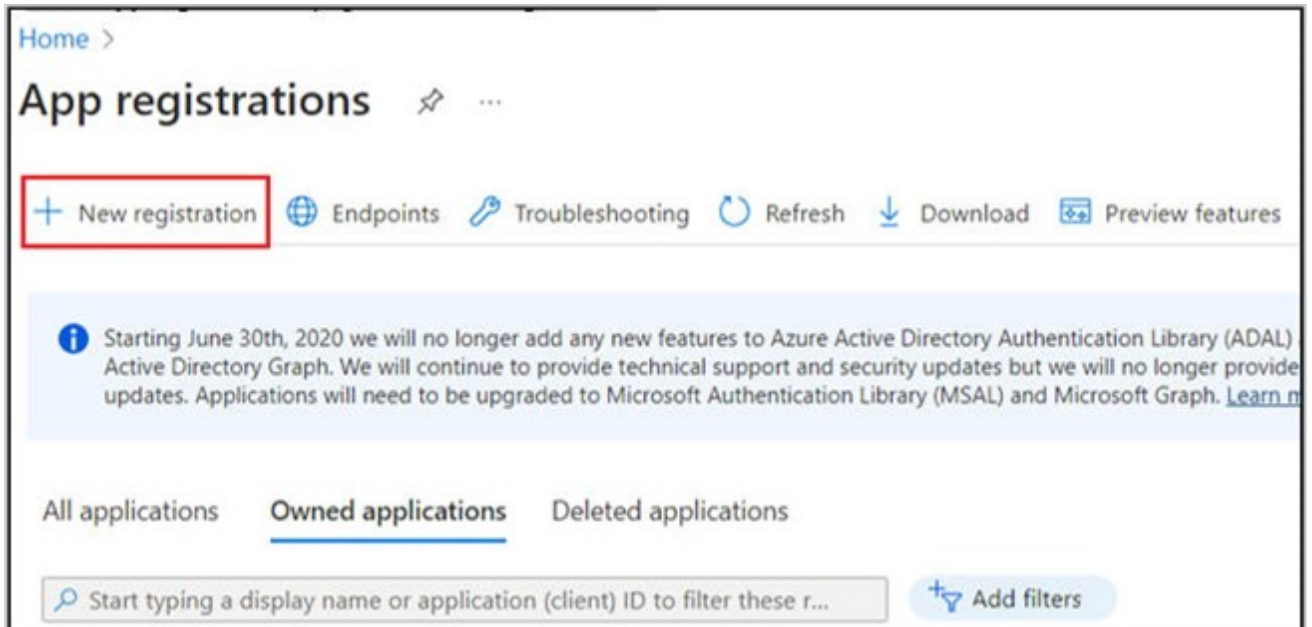
- Login to your **Microsoft Entra ID portal**, <https://entra.microsoft.com>, using your Microsoft 365 admin account.



- In the **Microsoft Entra portal**, go to the **Identity\Applications\App registrations** page.



- In the **App registrations** page, click **New registration**.



Home >

App registrations

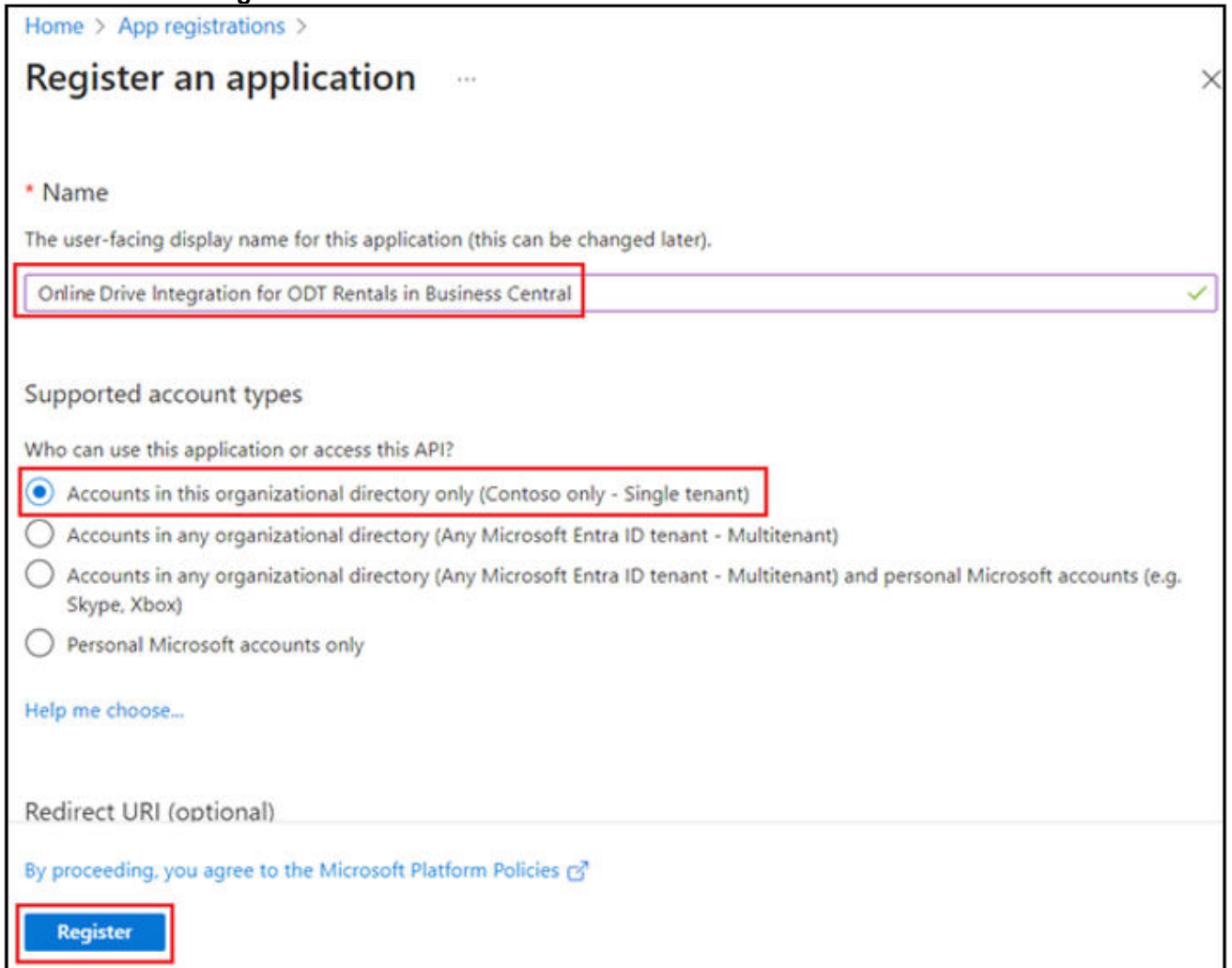
+ New registration Endpoints Troubleshooting Refresh Download Preview features

i Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

All applications **Owned applications** Deleted applications

Start typing a display name or application (client) ID to filter these r... Add filters

- Enter the Name of the app. For example, **Online Drive Integration for ODT Rentals in Business Central**.
- Supported account types: **Account in this organization directory only**.
- Then click on **Register**.



Home > App registrations >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Online Drive Integration for ODT Rentals in Business Central ✓

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only (Contoso only - Single tenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

☐ Personal Microsoft accounts only

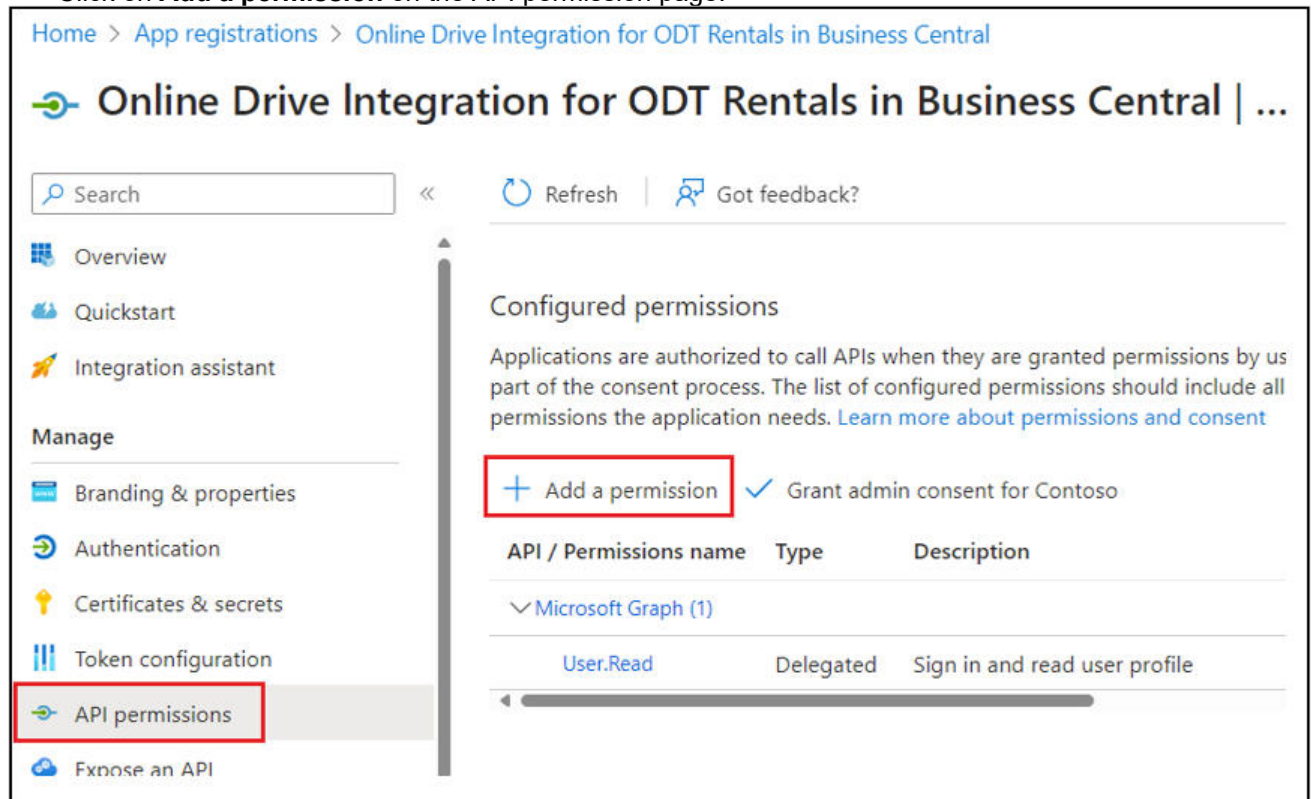
[Help me choose...](#)

Redirect URI (optional)

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

- Under the **Manage** section, select **API permissions**.
- Click on **Add a permission** on the API permission page.



Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business Central | ...

Search << Refresh Got feedback?

Overview
Quickstart
Integration assistant

Manage

Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API

Configured permissions

Applications are authorized to call APIs when they are granted permissions by us part of the consent process. The list of configured permissions should include all permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for Contoso



API / Permissions name	Type	Description
▼ Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile


Add all the permissions noted below with the **API of Microsoft Graph** and the **Type set to Delegated**.

- APIConnectors.Read.All
- APIConnectors.ReadWrite.All
- Application.Read.All
- Directory.AccessAsUser.All
- Directory.Read.All

- Files.Read
- Files.Read.All
- Files.Read.Selected
- Organization.Read.All
- Sites.FullControl.All
- User.Read



API Permissions after all required permissions have been entered.








 Refresh
  Got feedback?

 You are editing permission(s) to your application, users will have to consent even if they've already done so previously.



Configured permissions


Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions shows all the permissions the application needs. [Learn more about permissions and consent](#)

 Add a permission
  Grant admin consent for Contoso

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (11)				
APIConnectors.Read.All	Delegated	Read API connectors for authentication flows	Yes	 Not granted for
APIConnectors.ReadWrite.All	Delegated	Read and write API connectors for authentication flows	Yes	 Not granted for
Application.Read.All	Delegated	Read applications	Yes	 Not granted for
Directory.AccessAsUser.All	Delegated	Access directory as the signed in user	Yes	 Not granted for
Directory.Read.All	Delegated	Read directory data	Yes	 Not granted for
Files.Read	Delegated	Read user files	No	
Files.Read.All	Delegated	Read all files that user can access	No	
Files.Read.Selected	Delegated	Read files that the user selects (preview)	No	
Organization.Read.All	Delegated	Read organization information	Yes	 Not granted for
Sites.FullControl.All	Delegated	Have full control of all site collections	Yes	 Not granted for
User.Read	Delegated	Sign in and read user profile	No	



- Click on the **Grant Admin consent** button.

 Refresh
  Got feedback?

 Successfully granted admin consent for the requested permissions.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the con all the permissions the application needs. [Learn more about permissions and consent](#)

 Add a permission
  Grant admin consent for Contoso

- After granting the admin access the permission list should look like the following list with the Status updated.

+ Add a permission		✓ Grant admin consent for Contoso		
API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Microsoft Graph (11)				
APIConnectors.Read.All	Delegated	Read API connectors for authentication flows	Yes	✓ Granted for
APIConnectors.ReadWrite.All	Delegated	Read and write API connectors for authentication flows	Yes	✓ Granted for
Application.Read.All	Delegated	Read applications	Yes	✓ Granted for
Directory.AccessAsUser.All	Delegated	Access directory as the signed in user	Yes	✓ Granted for
Directory.Read.All	Delegated	Read directory data	Yes	✓ Granted for
Files.Read	Delegated	Read user files	No	✓ Granted for
Files.Read.All	Delegated	Read all files that user can access	No	✓ Granted for
Files.Read.Selected	Delegated	Read files that the user selects (preview)	No	✓ Granted for
Organization.Read.All	Delegated	Read organization information	Yes	✓ Granted for
Sites.FullControl.All	Delegated	Have full control of all site collections	Yes	✓ Granted for
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for

- In the **Manage** section, select **Certificates & secrets**.

Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business Central | Ce

Search << Got feedback?

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Certificates & secrets

Token configuration

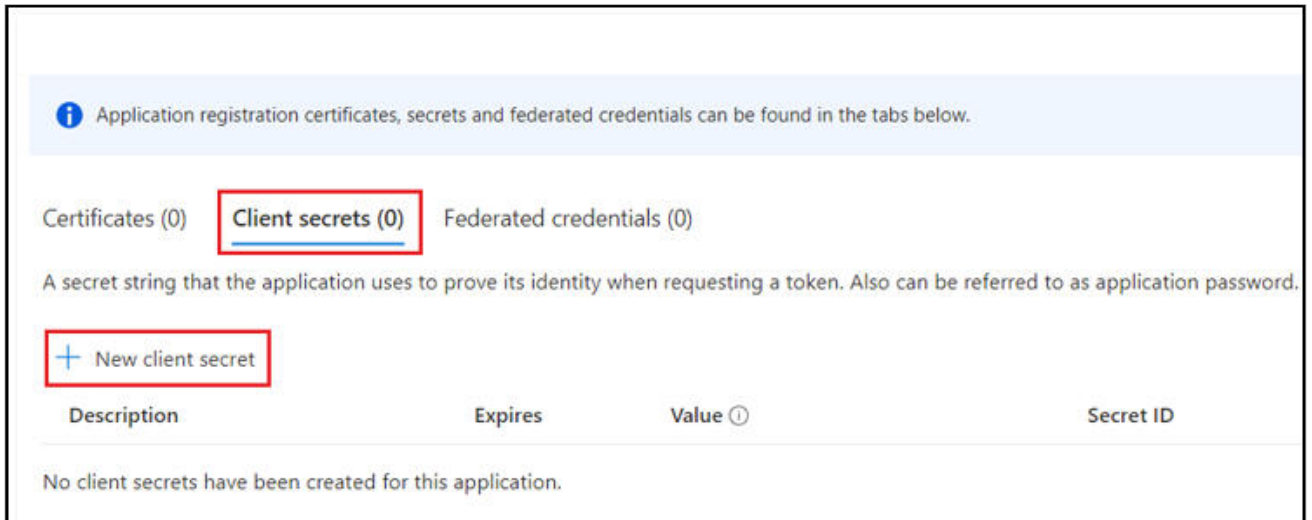
Credentials enable confidential applications to identify themselves to the authentic HTTPS scheme). For a higher level of assurance, we recommend using a certificate (i

Application registration certificates, secrets and federated credentials can be found

Certificates (0) Client secrets (0) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a tol

- On the **Certificates & secrets** page, go to the **Client secrets** tab and click on **New client secret**.



Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

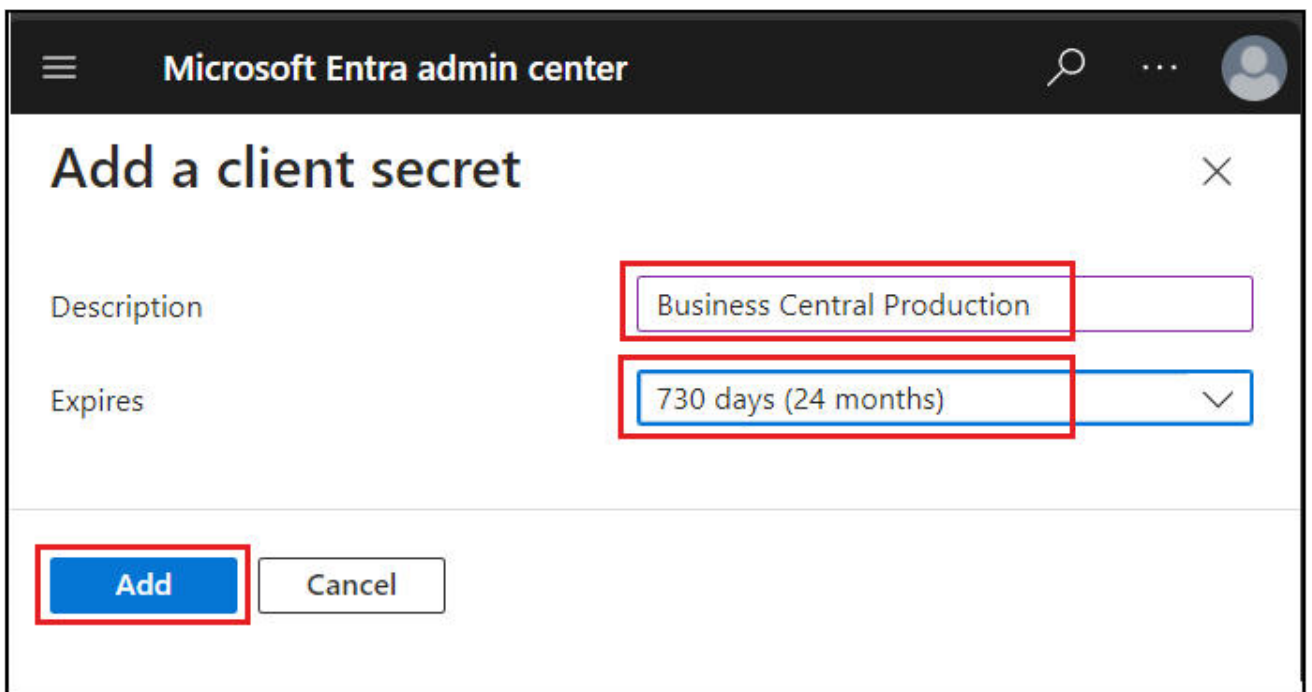
[+ New client secret](#)

Description	Expires	Value ⓘ	Secret ID
No client secrets have been created for this application.			

- Enter a Description: For example, **Business Central Production**
- Expires: Select the **730 days (24 months)** option.
- Click on **Add** to create the Client secret.

NOTE:

The client secret key is like an account password, which will expire according to the Expires date you set. Please create a reminder to create a new client secret before the expiration date, to prevent any service disruption.



Microsoft Entra admin center

Add a client secret

Description

Expires



IMPORTANT!

Make a note of the **Value of the Client Secret key** as you will need it to configure the OneDrive and Online Drive integration in the ODT Rentals app.

Certificates (0) **Client secrets (1)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.


+ New client secret

Description	Expires	Value ⓘ	Secret ID
Business Central Production	4/15/2026	w0A8Q~dIf3qJ4KL1AFNM... 	e507fd95-6fd9-4696-a4f3... 

- In the **Manage** section, select **Authentication** to open the Authentication page.

Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business

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Overview

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Platform configurations

Depending on the platform or device this application configuration may be required such as redirect URIs, specific fields specific to the platform.

+ Add a platform


Supported account types

Who can use this application or access this API?

- On the **Authentication** page, click on **Add a platform**.

Platform configurations

Depending on the platform or device this application is targeting, additional configuration may be required such as redirect URIs, specific authentication settings, or fields specific to the platform.

 Add a platform

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Contoso only - Single tenant)
- ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant -

- Select the **Web** option.

Configure platforms

Web applications



Web

Build, host, and deploy a web server application. .NET, Java, Python



Single-page application

Configure browser client applications and progressive web applications. Javascript.

Mobile and desktop applications

- **Redirect URL:** <https://businesscentral.dynamics.com/OAuthLanding.htm>.
- **Implicit grant and hybrid flows:** Access tokens (used for implicit flows).
- Click on **Configure**.

IMPORTANT:

Make note of the Redirect URL as you will need this information to configure the External Connector for the Online Drive integration in the ODT Rentals app.

Configure Web

[All platforms](#)

QuickstartDocs

* Redirect URIs

The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating or signing out users. The redirect URI you send in the request to the login server should match one listed here. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions](#)

https://businesscentral.dynamics.com/OAuthLanding.htm

Front-channel logout URL

This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.

e.g. https://example.com/logout

Implicit grant and hybrid flows

Request a token directly from the authorization endpoint. If the application has a single-page architecture (SPA) and doesn't use the authorization code flow, or if it invokes a web API via JavaScript, select both access tokens and ID tokens. For ASP.NET Core web apps and other web apps that use hybrid authentication, select only ID tokens. [Learn more about tokens](#).

Select the tokens you would like to be issued by the authorization endpoint:

☒ Access tokens (used for implicit flows)

☐ ID tokens (used for implicit and hybrid flows)

Configure

Cancel

- Go to the **Overview** page and **take note of the Application (client) ID value** as you will need it to configure the Online Drive integration in the ODT Rentals app.

Home > App registrations >

Online Drive Integration for ODT Rentals in Business Central

Search << Delete Endpoints Preview features

Overview

Quickstart

Integration assistant

Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

^ Essentials

Display name
[Online Drive Integration for ODT Rentals in Business Central](#)

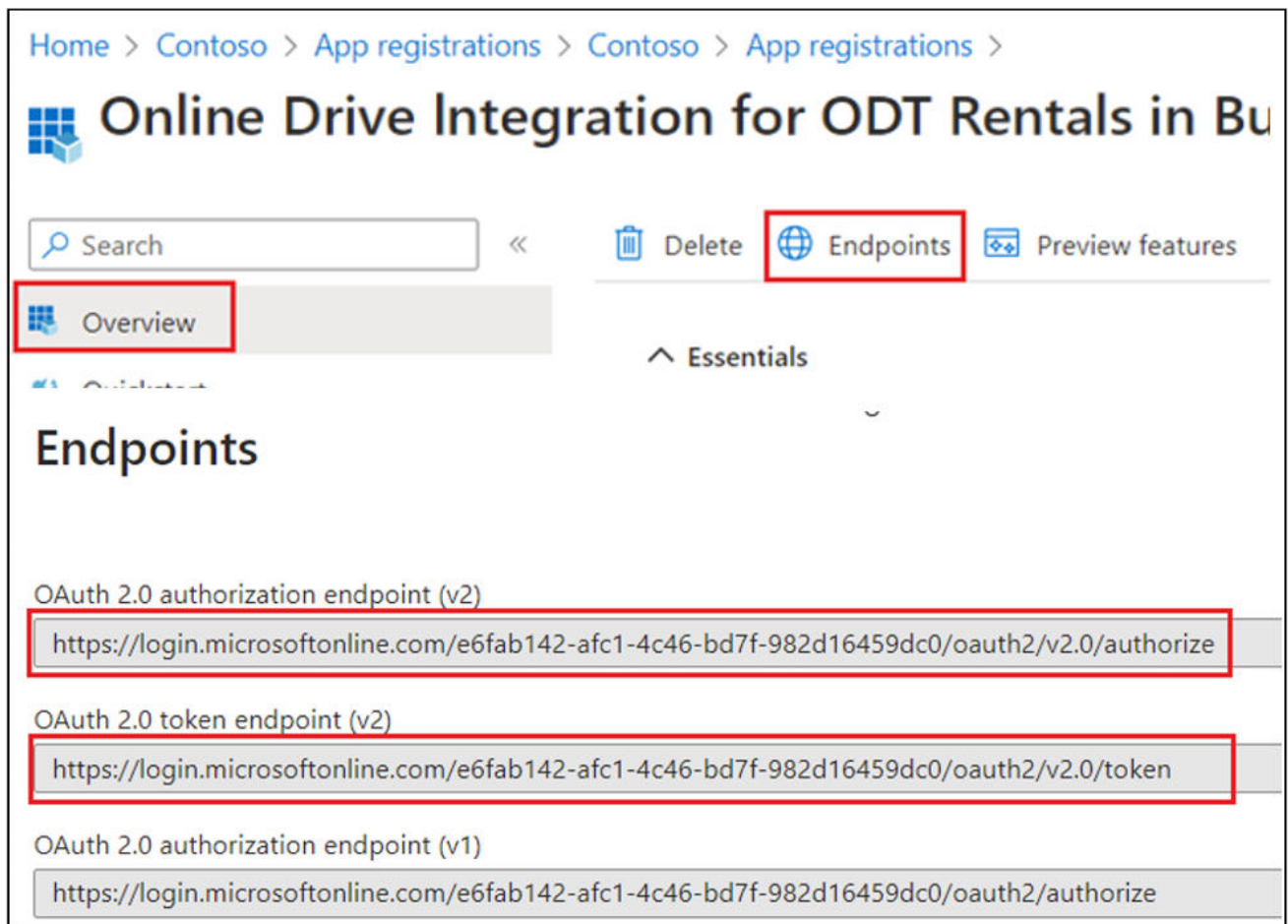
Application (client) ID
5dc08586-1382-42d1-bf48-b4ceb76c4bd8

Object ID
7c485f1b-9065-42c3-b95e-83a9e62df3aa

Directory (tenant) ID
e6fab142-afc1-4c46-bd7f-982d16459dc0

Supported account types
[My organization only](#)

- On the Overview page, click on the **Endpoints** button.
- Take note of the **OAuth 2.0 authorization endpoint (v2)** and **OAuth 2.0 token endpoint (v2)** values as you will need this information to configure the External Connector for the Online Drive integration in the ODT Rentals app.



3.23.4. How to Setup in Rentals for Saving the Pictures

3.23.4.1. Overview

The following setups in ODT Rentals is required when the pictures will be saved to SharePoint or OneDrive.

The Entra ID App Registration must be completed prior to the following setups as information when setting up the registration is needed when setting up an Online Drive External Connector and Online Drive mapping to the destination folder drive.

3.23.4.2. How to Setup an ONLINEDRIVE External Connector

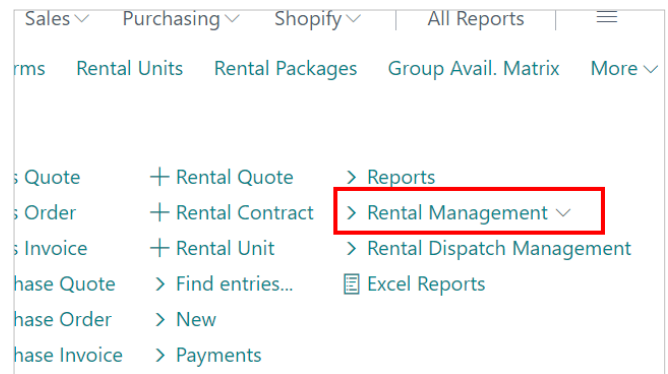
The Online Drive Connector is used for connecting to Sharepoint or OneDrive to automatically save the pictures.

The following demonstrates the setup of the External Connector for an Online Drive.

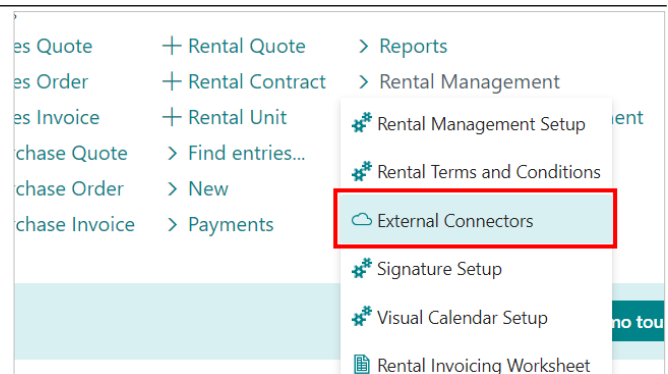


ODT Rentals Online Help

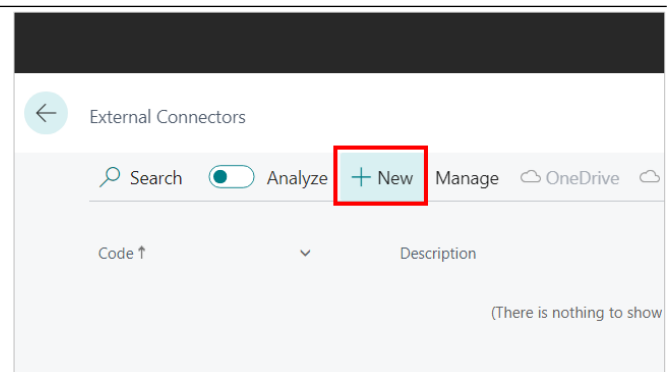
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **External Connectors**



Click on the navigation menu item **New**



ONLINEDRIVE Connector Setup Page

- **Code:** Enter ONLINEDRIVE
- **Description:** Enter Online Drive Connector
- **Application / Client ID:** Copy and paste **Application (client) ID** you saved when setting up the the Entra ID App Registration. It can also be found in the Microsoft Entra ID portal, Overview, Essentials.
- **Client Secret:** Copy and paste the **Value of the Client Secret Key** you saved when setting up the Entra ID App Registraton. It can also be found in the Microsoft Entra ID portal, Certificates & secrets, Client secrets.

- **Grant Type:** Authorization Code
- **Redirect URL:** Enter <https://businesscentral.dynamics.com/OAuthLanding.htm>
- **Scope:** Enter <https://graph.microsoft.com/.default>

Endpoints: Copy and paste from the **Microsoft Entra ID portal, Overview, Essentials – Endpoints list.**

- **Authorization URL:** Copy from the OAuth 2.0 authorization endpoint (v2) field.
- **Access Token URL:** Copy from the OAuth 2.0 token endpoint (v2) field.

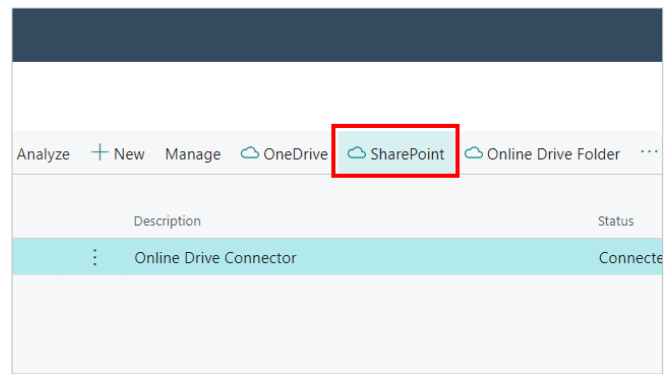
3.23.4.3. How to Configure the ONLINE DRIVE for SharePoint

If your organization has chosen to store the pictures on SharePoint, then complete the following steps once the following have been completed.

- Setup SharePoint folder(s) and Permissions.
- Create and Configure an Entra ID App Registration.

Click on the navigation menu item **SharePoint**

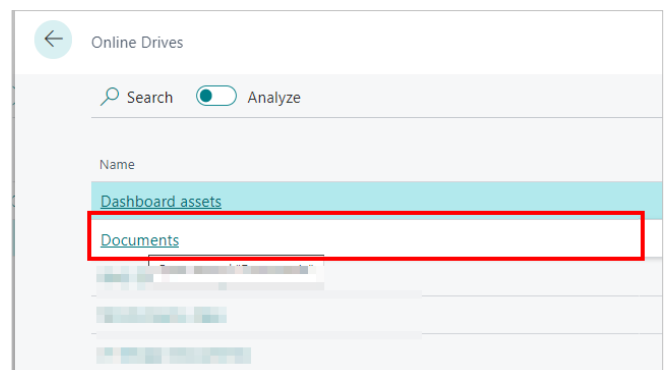
Ensure you are on the Online Drive Connector record before selecting SharePoint.



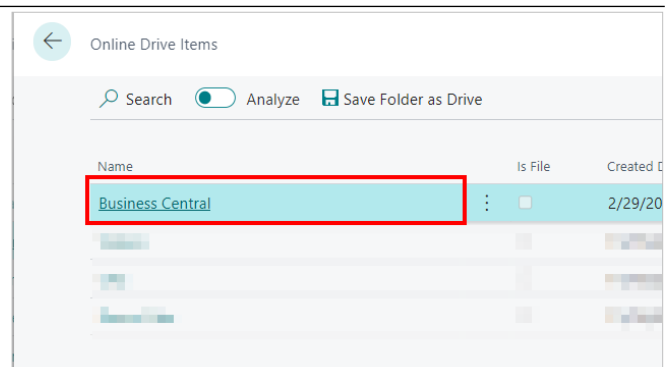
The folders selected in the next steps must be the the same folders decided in the planning stage and have been setup.

Example: Documents/Business Central/Rental Pictures

Click on the link in cell **Name** with the value **Documents**



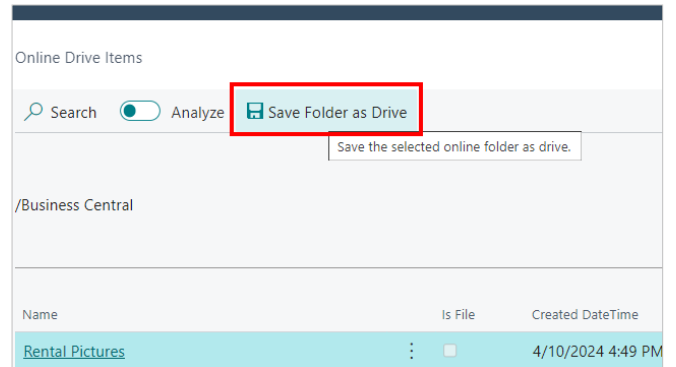
Click on the link in cell **Name** with the value **Business Central**



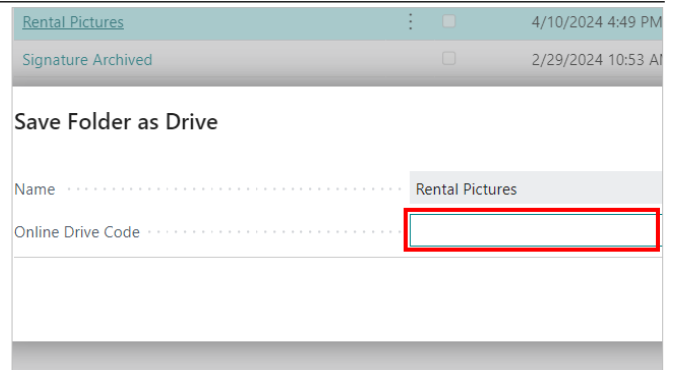
ODT Rentals Online Help

Click on the navigation menu item **Save Folder as Drive**

When you reach the folder in which the rental pictures are to be saved in ensure you are on the destination folder, then click on the Save Folder as Drive.

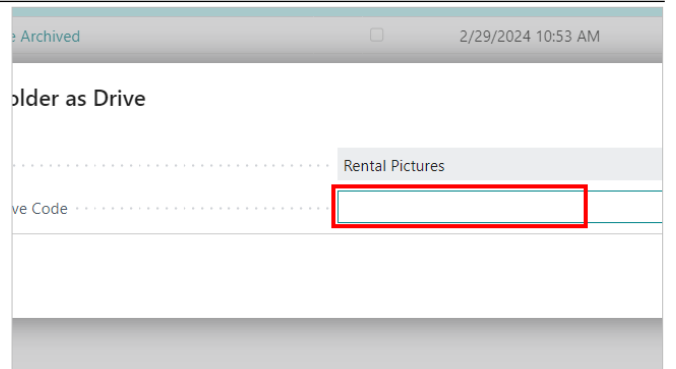


Click on the field **Online Drive Code**

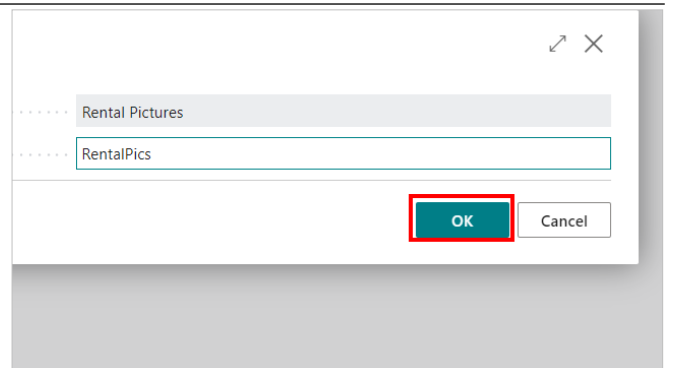


Enter the text **RentalPics**.

Enter a short code describing what the drive is for.

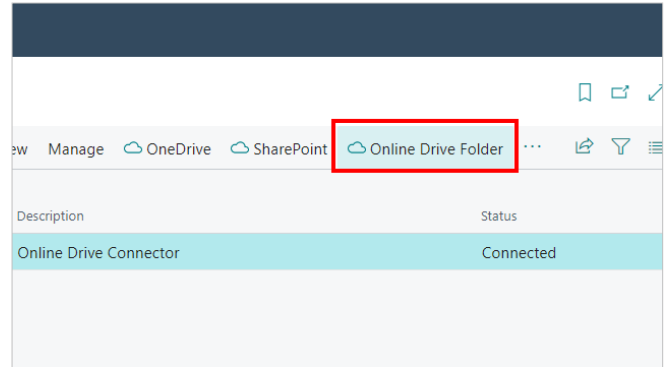


Click on the button **OK**

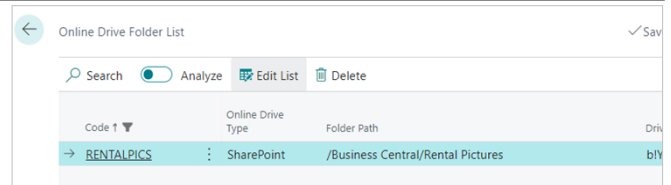


The details of the Online Drive for SharePoint can be viewed from the External Connectors page.

Click on the navigation menu item **Online Drive Folder**



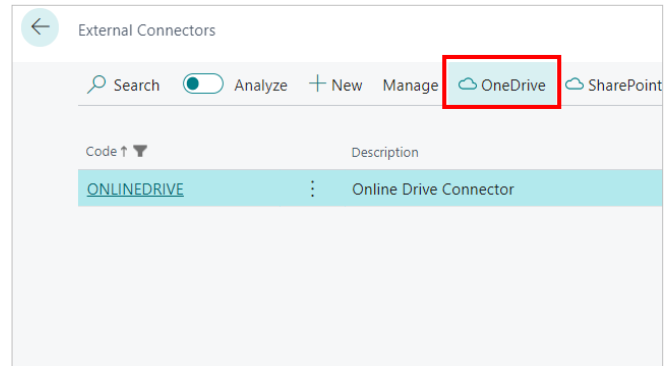
Online Drive Folder List



3.23.4.4. How to Configure the ONLINE DRIVE for OneDrive

If your organization has chosen to store the pictures on OneDrive, then complete the following steps.

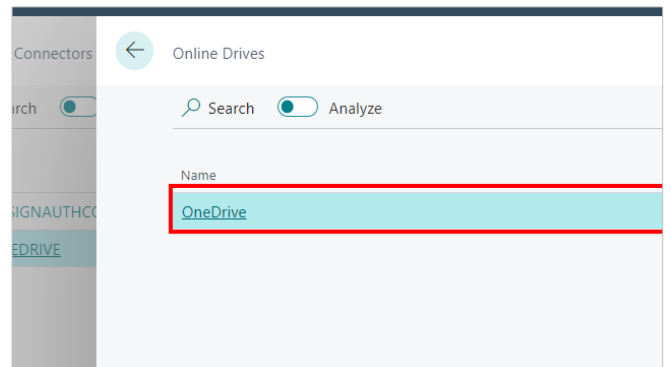
Click on the navigation menu item **OneDrive**



The folders selected in the next steps must be the the same folders decided in the planning stage and have been setup.

Example: OneDrive/Business Central/Picture Archived

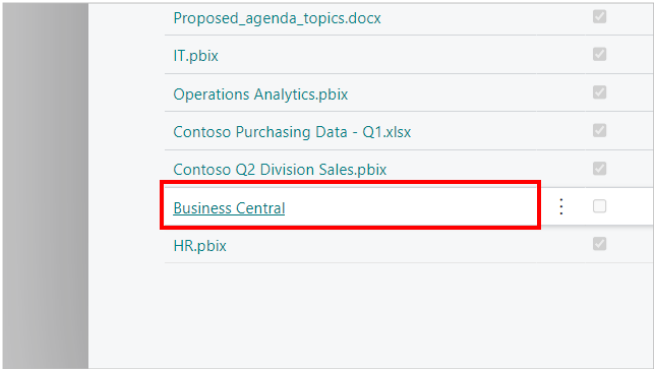
Click on the link in cell **Name** with the value **OneDrive**





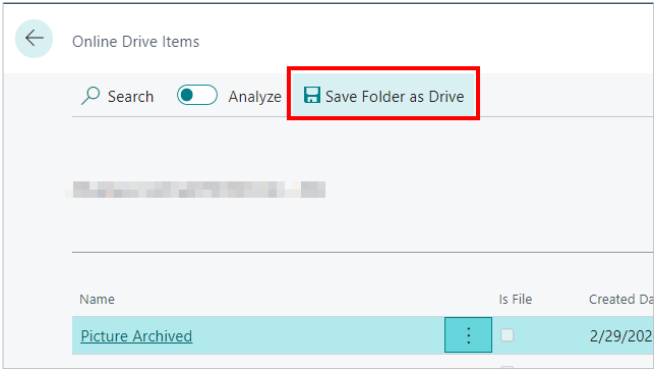
ODT Rentals Online Help

Click on the link in cell **Name** with the value **Business Central**

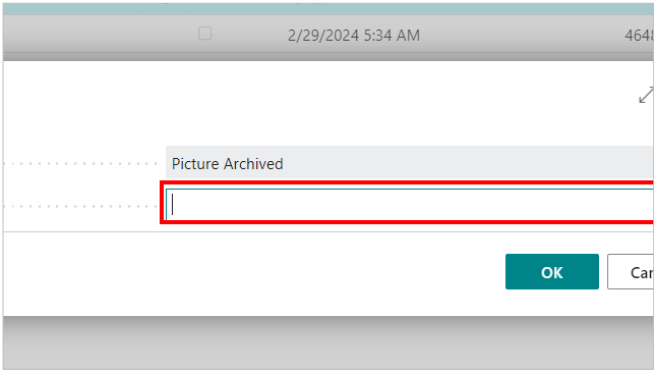


Click on the navigation menu item **Save Folder as Drive**

When on the folder in which the pictures are to be saved in, then click on the Save Folder as Drive.

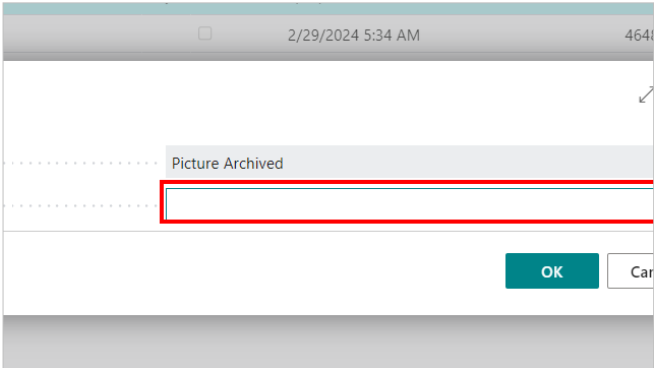


Click on the field **Online Drive Code**

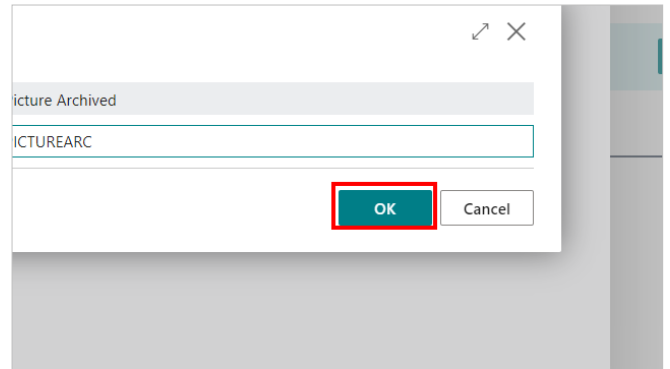


Enter the text **PICTUREARC**.

Enter a short code describing what the drive is for.



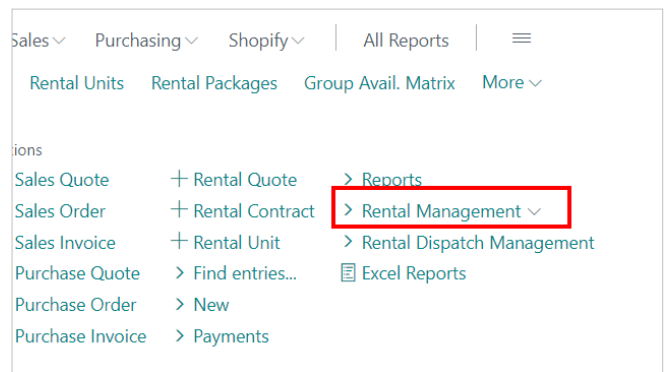
Click on the button **OK**



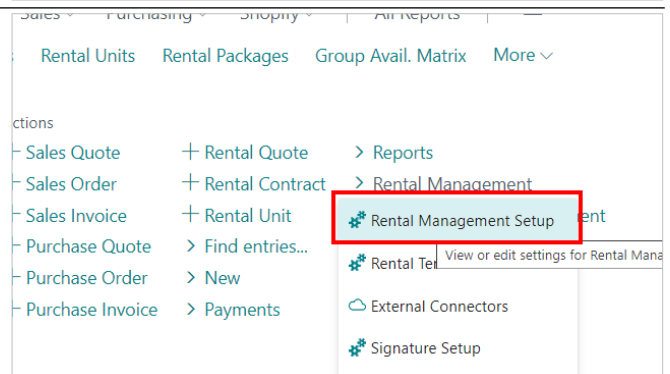
The details of the Online Drive for OneDrive can be viewed from the External Connectors page, Online Drive Folder List.

3.23.4.5. How to Setup Rental Management Setup for Pictures

Click on the navigation menu item popup **Rental Management**

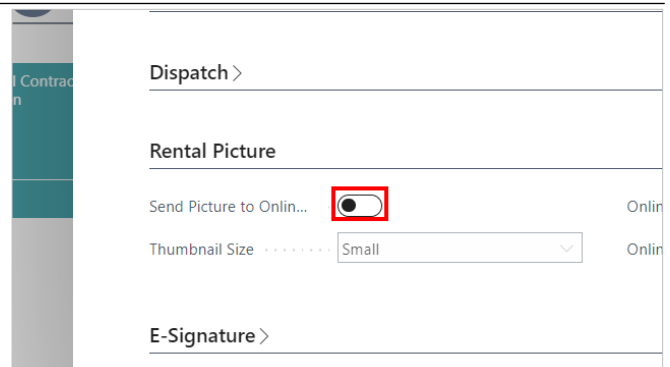


Click on the navigation menu item **Rental Management Setup**



Click on the toggle field Send Picture to Online Drive

When saving the pictures to an Online Drive it is mandatory that this toggle field is turned on.





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Click on the field **Thumbnail Size**

The default Thumbnail Size is Small; however the list contains Medium and Large should your organization prefer one of them.

Dispatch >

Rental Picture

Send Picture to Onlin... ☒ Online

Thumbnail Size

Small

Small

 Online

E-Signature >

Click on the lookup button **Online Drive Connector**

Online Drive Connector *

Online Drive Folder

RENTALPICS

Click on the link in cell **Code** with the value **ONLINEDRIVE**

Online Drive Connector *

Online Drive Folder

Code ↑	Description
DOCUSIGNAUTHCO...	DocuSign Authorizati...
ONLINEDRIVE	Online Drive Connecto...

Select record "ONLINEDRIVE"

+ New

Click on the lookup button **Online Drive Folder**

e Connector

ONLINEDRIVE

e Folder *

Click on the link in cell **Code** with the value
RENTALPICS

Select the Online Drive record with the Online Drive
Type that the pictures are to be saved to.

Online Drive Connector		ONLINEDRIVE
Online Drive Folder		*
Code ↑	Online Drive Type	
PICTUREARC	OneDrive	
RENTALPICS	SharePoint	
SIGNATURE	OneDrive	

3.23.5. How to Take Pictures on Rental Documents

IMPORTANT

When using a cell phone that has an IOS operating system to take pictures, then the cell phone must be held horizontally with the camera lens on the left hand side.

3.23.5.1. How to Take a Picture on a Posted Rental Delivery Document

The following provides the steps for taking a picture from a cell phone on a Posted Rental Delivery document header.

NOTES:

- The steps for taking a picture for the Posted Rental Deliver Lines are the same except you need to ensure your cursor is on the Rental Line that the picture is to be linked to and you select the Rental Delivery Line Picture where you select Take.
- The steps for taking pictures on a Posted Rental Return document header and lines are the same except you will open the Posted Rental Return document that the pictures are to be taken for.
- Log into Business Central on the cell phone.
- If the Rental Contract that the Posted Rental Delivery was created from is still open, then select the Rental Contracts - Open Cue.

Rental Activities

Rental

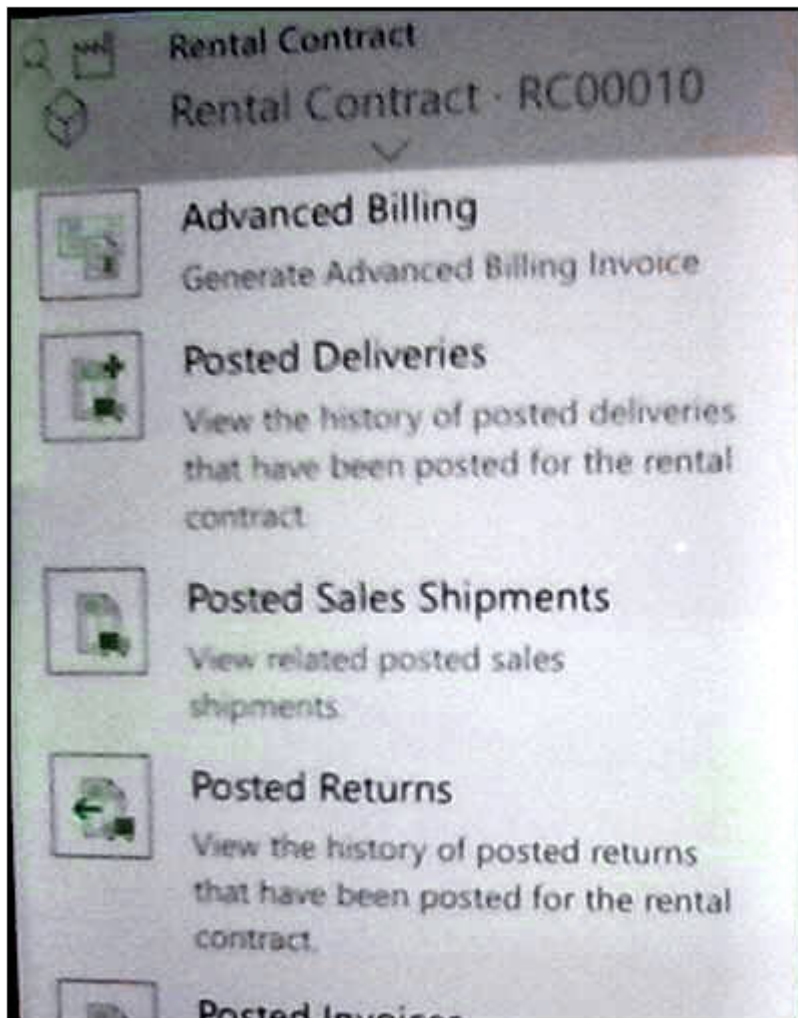
Rental Quotes - Open
1
>

Rental Contracts - Open
4
>

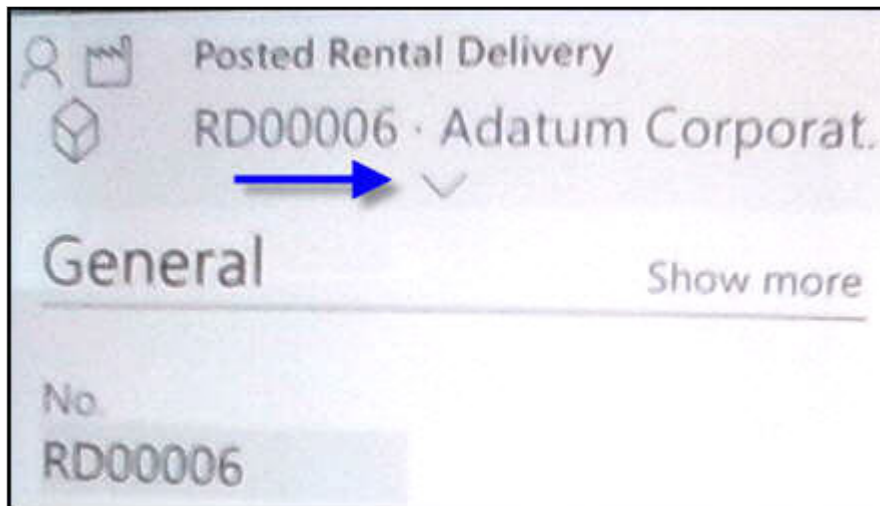
NOTE:

If the Rental Contract is no longer open, then search for Posted Rental Contracts or if you have the Posted Rental Delivery document number, then search for Posted Rental Deliveries.

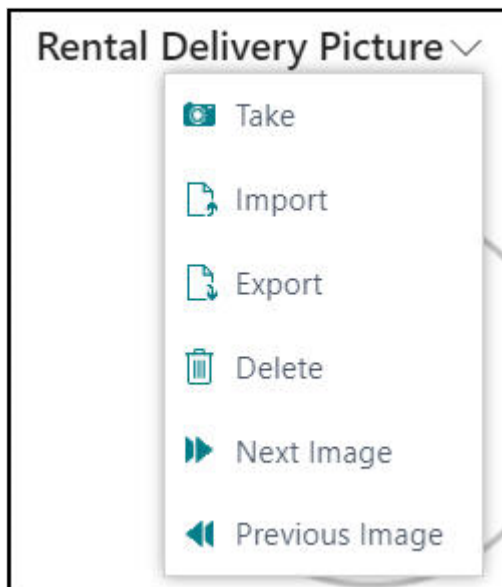
- Open the Rental Contract that the Posted Rental Delivery document is related to.
- Select the 3 dots at the bottom right on the cell screen and then scroll down to Posted Deliveries.
- Select the Posted Rental Delivery menu option and then select the document in the list that you want to take a picture on.



- Select the "v" at the top of the screen which will display the fact boxes.



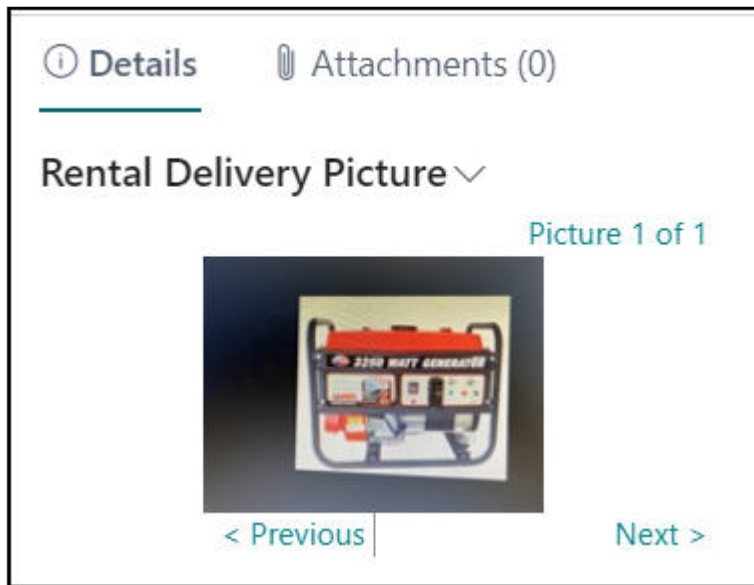
- To take a picture that is to be linked to the document header, then select Rental Delivery Picture which will display the menu options.
- Select Take to take the picture.



- If the picture is good, then select Use Picture on the cell phone, otherwise select Retake, and take another picture.



The picture will be saved to the Online Drive Folder specified on Rental Management Setup, and then will be displayed in the Rental Delivery Picture Fact Box.



3.24.Rental Credit Memos

3.24.1. Credit Memos Overview

3.24.1.1. Overview

The ODT Rentals App provide three options for creating Rental Credit Memos.

Create Corrective Credit Memo

The Create Corrective Credit Memo is a financial correction, which creates Rental Value Entries to the units for the credit amount, in addition to the standard financial correcting entries.

With this option, the user can edit the amounts on the credit memo lines, before posting the Sales Credit Memo.

Should there be lines brought in that credits will not be given to the customer, then these lines are to be deleted from the credit memo before posting it.

This option does not re-open Rental Amount Lines, therefore re-billing of a contract invoice is not included with this option.

Create Corrective Rental Credit Memo

The Create Corrective Rental Credit Memo is used to create both a financial correction and a rental correction.

With the financial correction, Rental Value Entries are posted to the units, in addition to the standard financial correcting entries.

With the rental correction, the Rental Amount Lines on the Rental Contract will be re-opened for the last



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posted invoice from the contract, when the rental credit memo is posted. Thus providing the ability to re-invoice the contract for the invoice credited.

With this feature, the editing of the credit memo is not allowed, including the prices and deleting the sales credit memo lines.

To ensure that the applicable invoice is selected, there is validation, which confirms that the invoice is the last billed invoice for that contract (based on "Invoice No." populated on Rental Amount Lines). The invoices must be credited in reverse order of how they were created (most recent invoice must be reversed first).

If the contract is closed, a message will occur asking the user if they want to re-open the contract. If the user declines, they will be prompted to use "Create Corrective Credit Memo" instead.

NOTE:

When creating a corrective rental credit memo for an invoice where Metered Usage has been invoiced, then the related Metered Usage Entries will have the fields, Billed and Invoice No. cleared.

When creating a corrective rental credit memo for an invoice where Periodic Usage and Standby Charges have been invoiced, then the related Rental Periodic Usage Entries will have the Billed field cleared.

Auto Credit Memos

The purpose of the Auto Credit Memo functionality is 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 is restricted to Start and Periodic Start Rental Terms.

For all rental terms, except for optimized terms, the credit amount is calculated based on a prorated day rate. The prorated day rate is determined by the number of days to be credited divided by the number of days in the month that the rental invoice commenced in and then multiplied by the rental unit price.

When the rental term is optimized, the credit amount can be based on either the prorated day rate, or the difference between what was invoiced and what would have been invoiced if the rental return date had been set to the actual return date.

The Credit Memos will have the same Posting Date as is on the Rental Contract when the early returns are posted, and be applied to the applicable invoice or invoices.

The application of the Credit Memos will occur when the invoice(s) are still open. Meaning either no payment or only a partial payment has been applied to the invoice. If the invoice is not open, then the applicable Credit Memo line amount will not be applied.

On posting of the Credit Memo, either automatically or manually, the following will occur on the Rental Contract, and can be viewed/verified from the Rental Contract or Completed Rental Contract.

- Rental Value Entries: A new line is generated for the Credit Amount
- Rental Ledger Entries: On the applicable Rental Line the Rental Amount will be reduced by the Credit Amount
- Rental Amount Lines: No rental amount line is created

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, sent, or emailed.

The Rental Credit Memo format prints the credit information like the rental information on the Posted Rental Invoice.



NOTE

The Auto Credit Memo functionality currently does not include the automatic creation of Credit Memos for Rental Packages.

IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company, therefore the help refers to Tax Group Code.

Should your organization be using the Global (Rest of World) version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

3.24.2. Corrective Credit Memos

3.24.2.1. How to Create a Corrective Credit Memo

3.24.2.1.1. Overview

The Create Corrective Credit Memo is a financial correction.

In addition, Rental Value Entries will be created and posted to the units.

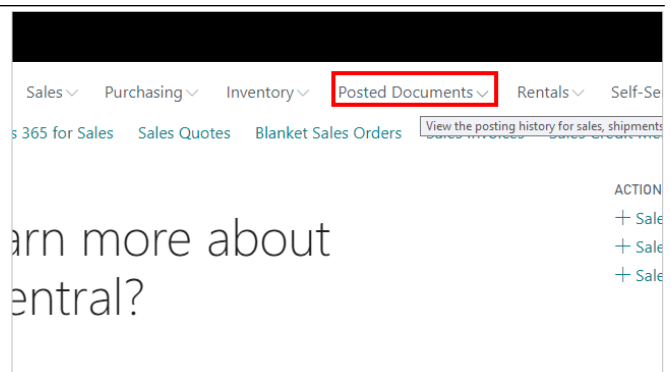
3.24.2.1.2. How to Create a Corrective Credit Memo

Profile - Sales Order Processor

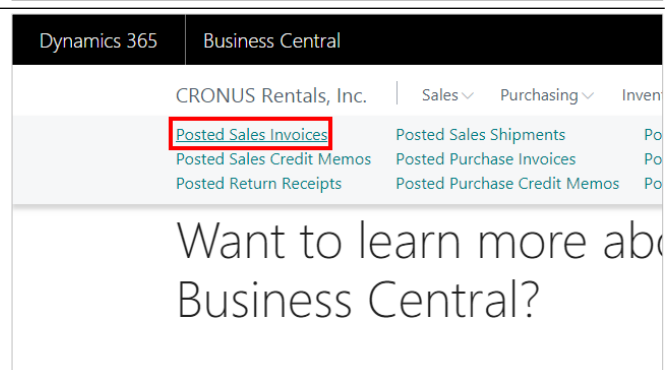
Should the user have the Business Manager Profile, then the Posted Rental Invoices list is accessed in the command bar option, Rentals.

The Posted Rental Invoice list is a filtered view of the Posted Sales Invoice, so that only invoices created from Rental Contracts are displayed.

Click on the navigation menu item popup **Posted Documents**



Click on the navigation menu item **Posted Sales Invoices**





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Click on the link in cell **No.** with the value **RI00003**

Select the invoice for which a Corrective Credit Memo is to be created.

RI00008	10000	Adatum Corporation	6/15/2018
RI00007	10000	Adatum Corporation	6/17/2018
RI00006	10000	Adatum Corporation	7/8/2018
RI00005	10000	Adatum Corporation	6/8/2018
RI00004	10000	Adatum Corporation	6/9/2018
RI00003	10000	Adatum Corporation	5/9/2018
RI00001	10000	Adatum Corporation	6/8/2018
PS-INV1032...	40000	Alpine Ski House	2/26/2018
PS-INV1032...	40000	Alpine Ski House	2/21/2018

Click on the navigation menu item popup **Correct**

Dynamics 365 Business Central

CRONUS | POSTED SALES INVOICE | WORK DATE: 4/8/2019

RI00001 · Adatum Corporation

Invoice **Correct** Print/Send Navigate Electronic Document

General

No. RI00001

Customer Adatum Corporation

Click on the link **Create Corrective Credit Memo**

CRONUS | POSTED SALES INVOICE | WORK DATE: 4/8/2019

RI00001 · Adatum Corporation

Invoice **Correct** Print/Send Navigate Electronic Document

Create Corrective Credit Memo Show C

No. RI00001 Reveal secondary actions

Customer Adatum Corporation

Contact Robert Townes

The Credit Memo will automatically open.

Click on the field **Posting Date**

The Posting Date will default from the Posted Sales Invoice, Posting Date.
Should the date need to be different, then enter or lookup and select the date upon which the Credit Memo is to be posted.

on

Request Approval | Actions | Navigate | Less options

Show more

Posting Date 4/9/2018 Type the date in the format M/d/yyyy

Due Date 5/9/2018

UNIT OF LINE

ODT Rentals Online Help

Enter the text **50.00**.

LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX
	1		\$	SUPPLIES	500.00
	1		500.00	SUPPLIES	500.00
1,000.00	Total Excl. Tax (USD)				1,000.00

Click on the cell Unit Price Excl. Tax

LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX
	1		50.00	SUPPLIES	500.00
	1		500.00	SUPPLIES	500.00
			500.00		
1,000.00	Total Excl. Tax (USD)			1,000.00	

Enter the text **50.00**.

LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX
	1		50.00	SUPPLIES	50.00
	1		<div style="border: 2px solid red; padding: 2px;">500.00</div>	SUPPLIES	500.00
550.00			Total Excl. Tax (USD)		550.00

Click on the navigation menu item popup **Process**



Click on the navigation menu item **Post**

SALES CREDIT MEMO

S-CR1001 · Adatum Corpor

Process Release Posting Prepare Credit Mem

Post

Customer Name Adatum Corporation

Contact Robert Townes

Click on the button **Yes**

Do you want to post the credit memo?

Yes No

Yes

UNIT OF MEASURE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX
			50.00
			50.00
Total Excl. Tax (USD)			100.00
Total Tax (USD)			2.00

Click on the button **No**

credit memo is posted as number PS-CR104001 and moved to the Posted Sales Credit Memos window.

Do you want to open the posted credit memo?

Yes No

No

UNIT OF MEASURE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE AMOUNT EXCL. TAX
			50.00
			50.00
Total Excl. Tax (USD)			100.00
Total Tax (USD)			2.00
Total Excl. Tax (USD)			102.00

On posting, the credit memo is automatically applied to the invoice which was selected.

3.24.2.1.3. Reviewing the Unit Rental Value Entries

Profile - Sales Order Processor

When a user has the Business Manager profile, they can use the same steps provided here.

Click on the navigation menu item popup **Rentals**

Inventory ▾ Posted Documents ▾ Rentals ▾ Self-Service ▾

quotes Blanket Sales Orders Sales Invoices Sales Credit Memos Sales Return Order

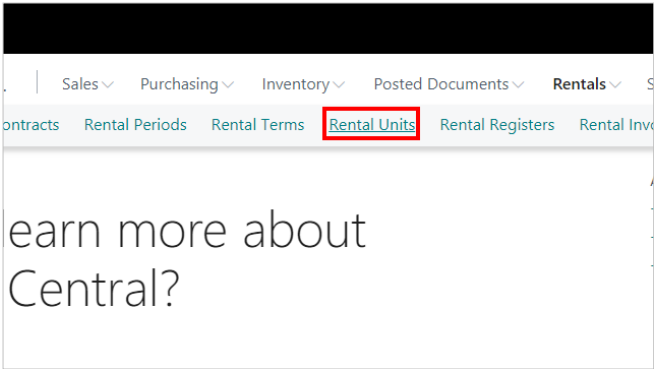
about

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order
- + Sales Return Order
- + Sales Credit Memo
- + Rental Quote



Click on the navigation menu item **Rental Units**

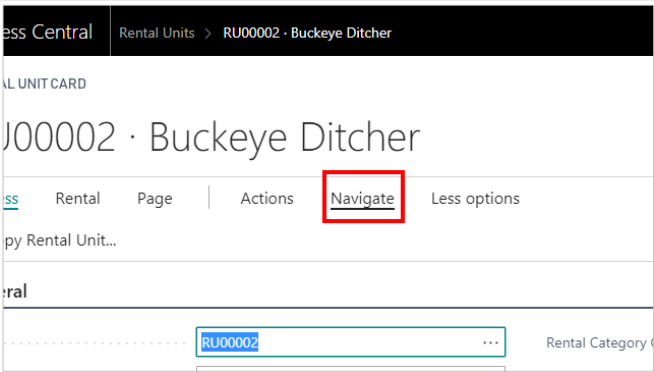


Click on the link in cell **No.** with the value **RU00002**

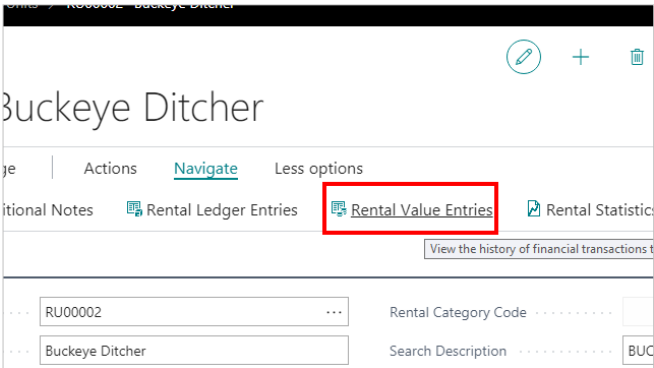
Select one of the units that was or is on the Rental Contract.

Rental Units: All				Search	New	Manage	Process	Rental
NO.		DESCRIPTION	GROUP					
PG-001	:	Portable Generators						
BD-006		Buckeye Ditcher						
RU00001		Buckeye Ditcher Group						
RU00002	:	Buckeye Ditcher						
RU00003		Buckeye Ditcher						
RU00004		Buckeye Ditcher						
RU00005		Buckeye Ditcher						
RU00006		Buckeye Ditcher						

Click on the navigation menu item popup **Navigate**



Click on the navigation menu item **Rental Value Entries**



Click on the cell Cr. Memo No.

Note the Credit Memo entry has been created on the Rental Unit.

BD-002	RI00003	20000	0	1
BD-002	RI00011	20000	0	1
BD-002	RI00002	20000	0	1
BD-002	RI00005	20000	0	1
BD-002	RI00005	20000	0	1
BD-002	0	PS-CR104001	30000	1
BD-002	RI00004	20000	PS-CR104001	0
BD-002	RI00008	20000	0	1
BD-002	RI00008	20000	0	0.22581
BD-002	RI00007	20000	0	1

Click on the back button

Dynamics 365
Business Central
Rental Units > RU00002 · Buckeye Ditcher >

CR
←

RU00002 · BUCKEYE DITCHER

RU00002 · Buckeye Ditcher

Search
Process
Rental
Open in Excel

POSTING DATE	ENTRY TYPE	RENTAL DOC. NO.	NO. ▼
4/9/2018	Rental	RC00003	RU00002
4/9/2018	Rental	RC00005	RU00002

Click on the back button

3.24.2.1.4.

Reviewing the Customer Ledger Entries

Profile - Sales Order Processor

When a user has the Business Manager profile, they can use the same steps provided here.

Click on the navigation menu item **Customers**

Self-Service ▾

Profit Memos Sales Return Orders Items **Customers** Item Journals Sales Journals

ACTIONS

+ Sales Quote	+ Sales Return Order	+ Rental Contract	> Sales
+ Sales Invoice	+ Sales Credit Memo	+ Rental Units	> Reports
+ Sales Order	+ Rental Quote	> Tasks	> Rental Management

ODT Rentals Online Help





Click on the data brick **No. = 10000, Name = Adatum Corporation, Contact = Robert Townes**

Select the Customer for whom the credit memo was posted.

Dynamics 365
Business Central
Customers




CRONUS Rentals, Inc.
Sales
Purchasing
Inventory
Posted

Customers:
All
Search
+ New
X Delete
Process
Report

 <div> 10000 <u>Adatum Corporation</u> Robert Townes </div>	20,283.52 0.00	 <div> 20000 Trey Research Helen Ray </div>	3,0 2,
 <div> 50000 Relecloud Jesse Homer </div>	8,836.80 5,754.96	 <div> C00010 Joe Rental </div>	

Click on the navigation menu item popup **Navigate**

Navigation bar: s > 10000 - Adatum Corporation

Navigation bar:   

Navigation bar: um Corporation

Navigation bar: Approval Customer | Actions **Navigate** Report Less options

Navigation bar: Adatum Corporation

Navigation bar: Total Sales 20,283.52

Navigation bar: Costs (\$)

Click on the navigation menu item popup **History**

The screenshot shows the 'CUSTOMER CARD' for '10000 · Adatum Corporation'. The left sidebar contains the 'CUSTOMERS' list with two entries. The main area has tabs for 'New Document', 'Request Approval', 'Customer', and 'Account'. Below the tabs, there are three links: 'Customer' (with a person icon), 'History' (with a clock icon and highlighted by a red box), and 'Prices and Discounts' (with a dropdown arrow). Below these links, there are three rows of data: 'Name' (Adatum Corporation), 'Balance (\$)', and 'Balance Due (\$)', each with a corresponding input field.

Click on the navigation menu item **Ledger Entries**

CRONUS

CUSTOMER CARD

Customers:

10000 · Adatum Corporation

New Document Request Approval Customer Act

Customer History Prices and Discounts

Ledger Entries

View the history of transactions that have been posted

Sales

Entry Statistics

Statistics by Currencies

Name

Balance (\$)

Balance Due (\$)

Credit Limit (\$)



Click on the cell **Document No.** with the value **PS-CR104001**

Note that the Credit Memo has been posted to the Customer.

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	CUSTOMER NO.	MESSAGE TO REC
5/8/2018	Credit Memo	PS-CR104001	10000	
5/5/2018	Invoice	RI00011	10000	
5/8/2018	Invoice	RI00010	10000	
4/9/2018	Invoice	RI00009	10000	
5/15/2018	Invoice	RI00008	10000	
5/17/2018	Invoice	RI00007	10000	
6/8/2018	Invoice	RI00006	10000	

Click on the link in cell Remaining Amt. (\$)

Note that the Remaining Amt. (\$) has been reduced on the invoice by the Credit Memo amount.

5/8/2018	1,020.00	1,020.00	6/8/2018	5/16/2018	5/1
4/9/2018	163.20	163.20	5/9/2018	4/17/2018	4/1
5/15/2018	1,250.32	1,250.32	6/15/2018	5/23/2018	5/2
5/17/2018	1,428.00	1,428.00	6/17/2018	5/25/2018	5/2
6/8/2018	1,122.00	1,122.00	7/8/2018	6/16/2018	6/1
5/8/2018	1,122.00	1,122.00	6/8/2018	5/16/2018	5/1
5/9/2018	1,020.00	1,020.00	5/9/2018	5/17/2018	5/1
4/9/2018	918.00	918.00	5/9/2018	4/17/2018	4/1
5/8/2018	1,020.00	Open record "918.00" in a new window	5/8/2018	5/16/2018	5/1
4/9/2018	1,020.00	1,020.00	5/9/2018	4/17/2018	4/1
3/16/2018	0.00	0.00	3/16/2018		
3/7/2018	0.00	0.00	3/7/2018		
3/1/2018	0.00	0.00	3/1/2018		
2/26/2018	0.00	0.00	2/26/2018		

When clicking on the Remaining Amount (\$) the Detailed Customer Ledger Entries page will open.

Click on the cell **Entry Type** with the value **Application**

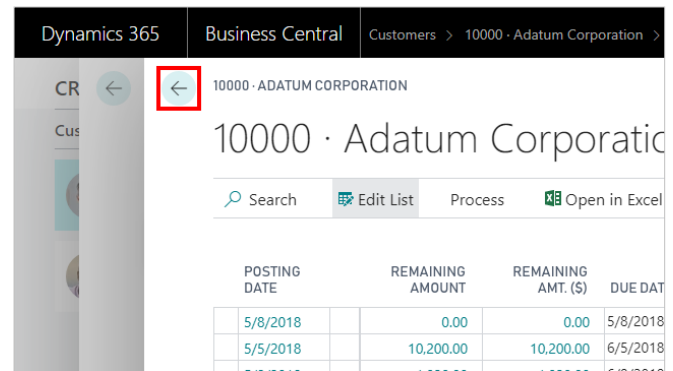
Note that the Credit Memo has been applied to the invoice.

POSTING DATE	ENTRY TYPE	DOCUMENT TYPE	DOCU
4/9/2018	Initial Entry	Invoice	RI000
5/8/2018	Application	Credit Memo	PS-CR

Click on the back button

Dynamics 365	Business Central	Customers > 10000 - Adatum Corporation >
4312	4312	4312
Back	4312	4312
POSTING DATE	ENTRY TYPE	DOCUMENT TYPE
4/9/2018	Initial Entry	Invoice
5/8/2018	Application	Credit Memo

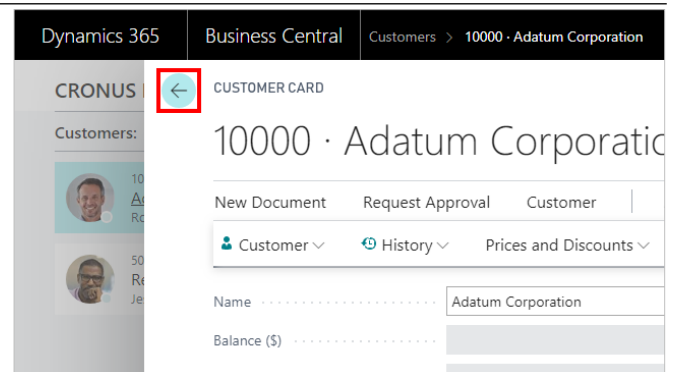
Click on the back button



The screenshot shows the Dynamics 365 Business Central interface. The breadcrumb trail is 'Customers > 10000 · Adatum Corporation >'. The main header is '10000 · ADATUM CORPORATION'. Below it, the title is '10000 · Adatum Corporation'. There are buttons for 'Search', 'Edit List', 'Process', and 'Open in Excel'. A table is displayed with the following data:

POSTING DATE	REMAINING AMOUNT	REMAINING AMT. (\$)	DUE DATE
5/8/2018	0.00	0.00	5/8/2018
5/5/2018	10,200.00	10,200.00	6/5/2018

Click on the back button



The screenshot shows the Dynamics 365 Business Central interface. The breadcrumb trail is 'Customers > 10000 · Adatum Corporation >'. The main header is 'CUSTOMER CARD'. Below it, the title is '10000 · Adatum Corporation'. There are buttons for 'New Document', 'Request Approval', and 'Customer'. Below these are dropdown menus for 'Customer', 'History', and 'Prices and Discounts'. The 'Name' field is filled with 'Adatum Corporation'. The 'Balance (\$)' field is empty.

3.24.2.2. How to Create a Corrective Rental Credit Memo

3.24.2.2.1. Overview

The Create Corrective Rental Credit Memo is used to create both a financial correction and a rental correction.

This feature is for use when a rental invoice is to be reversed in full, so that the Rental Contract can be revised and the contract be rebilled for the rental period covered by the initial invoice.

With this feature, should the invoice to be reversed not be the last invoice, then the invoices must be credited in reverse order of how they were created. The most recent invoice must be reversed first.

Then the contract can be revised, and the rebilling of the rental periods previously billed can be processed.

The Credit Memo lines cannot be edited, nor any lines deleted before posting.

Should the contract have been completed with all invoicing posted and the return posted, then an option is provided to re-open the contract.

NOTE:

When creating a corrective credit memo for an invoice where Metered Usage has been invoiced, then the related Metered Usage Entries entries will have the fields, Billed and Invoice No. cleared.

To review the Metered Usage Entries on a contract, go to the Rental Line command bar, More options, Lines, Metered Usage Entries.

When creating a corrective credit memo for an invoice where Periodic Usage and Standby Charges have been invoiced, then the related Periodic Usage Entries will have the Billed field cleared.

To review the rental calendar for periodic and usage records related to a selected line, go to the Rental Lines command bar, More options, Line, Periodic Usage Entries.



3.24.2.2.2.
Open Contract

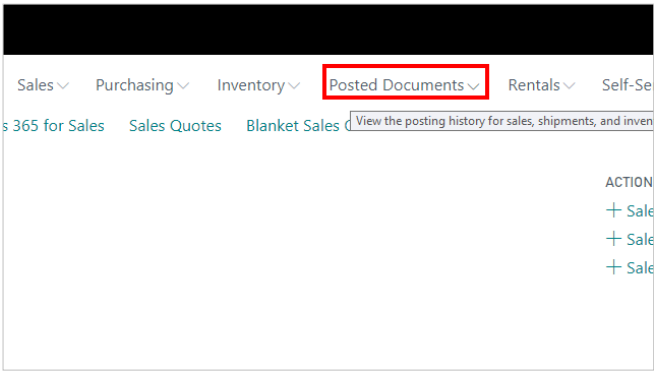
How to Create a Corrective Rental Credit Memo from an

Profile - Sales Order Processor

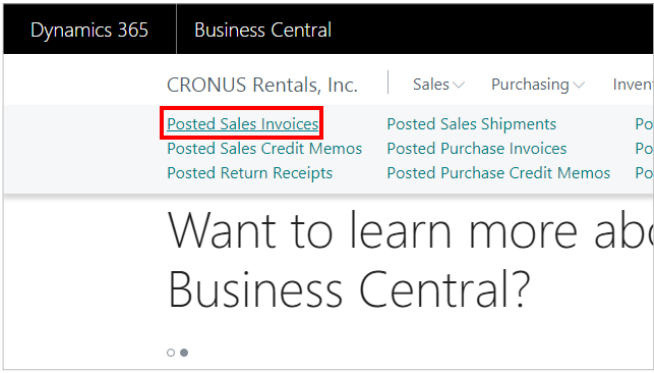
When a user has the Business Manager Profile, they can use basically the same steps provided here, with the exception of the initial steps to open the posted invoice.

The steps for the Business Manager Profile are noted below the steps for the Sales Order Processor Profile for accessing the posted invoices.

Click on the navigation menu item popup **Posted Documents**



Click on the navigation menu item **Posted Sales Invoices**



Should the user have the Business Manager Profile, then the Posted Rental Invoices list is accessed in the menu option, Rentals.

The Posted Rental Invoice list is a filtered view of the Posted Sales Invoice, so that only invoices created from Rental Contracts are displayed.

Alternatively, if the Rental Contract No. is known, a user can go to either the Open Rental Contract or Posted Rental Contract, as applicable. From there the user can select the Posted Invoices option on the ribbon, to select the invoice to be credited.



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RI00012**

Select the invoice where the Rental Contract is still open and for which a Corrective Rental Credit Memo is to be created.

CRONUS Rentals, Inc. | Sales ▾ Purchasing ▾ Inventory ▾ Posted				
Posted Sales Invoices: All ▾ | 🔍 Search ✕ Delete Invoice ▾ Correct ▾				
NO. ↓	CUSTOMER NO.	CUSTOMER	CURRENCY CODE	DUE DATE
RI00012	10000	Adatum Corporation		6/8/2018
RI00011	10000	Adatum Corporation		6/5/2018
RI00010	10000	Adatum Corporation		6/8/2018
RI00009	10000	Adatum Corporation		5/9/2018
RI00008	10000	Adatum Corporation		6/15/2018

Click on the navigation menu item popup **Actions**

Business Central | Posted Sales Invoices > RI00012 · Adatum Corporation

POSTED SALES INVOICE

RI00012 · Adatum Corporation

Invoice Correct **Actions** Navigate Less options

General

No. RI00012

Customer Adatum Corporation

Click on the navigation menu item popup **Correct**

Activity Log Incoming Document ▾ **Correct ▾** Invoice ▾

Documents

No. RC00016

Click on the navigation menu item **Create Corrective Rental Credit Memo...**

on

s

mail Navigate Activity Log Incoming Document ▾ **Correct ▾**

Create Corrective Credit Memo

Create Corrective Rental Credit Memo...

Create a rental credit memo for this post

Quote No.

Order No.

Rental Contract No. RC00016

Closed No

The Credit Memo will automatically open.

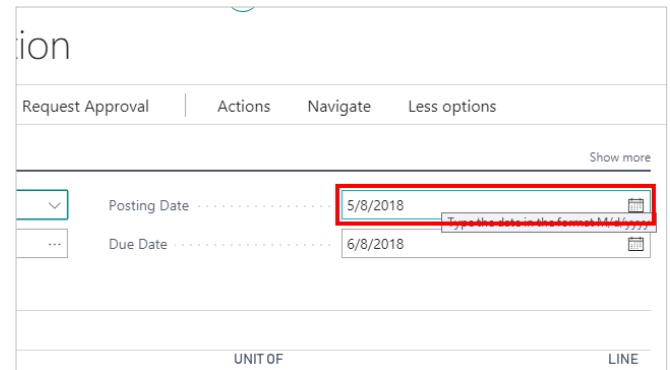
The Credit Memo lines cannot be modified or deleted when using the Create Corrective Rental Credit Memo.

This option is to be used strictly to fully reverse the invoice and re-open the Rental Amount Lines, which were billed on the invoice being credited. Thus enabling the rental contract lines to be modified and re-billing can be done for the same period.

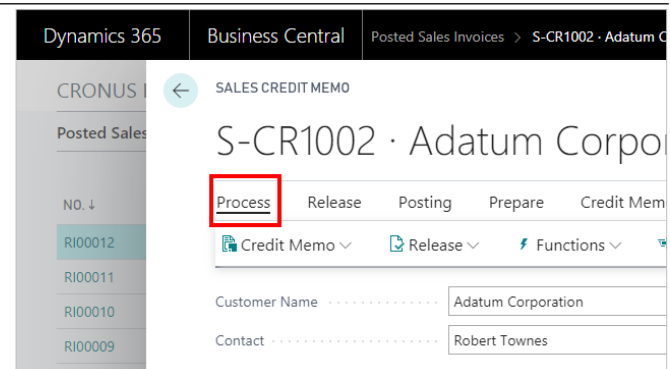
Click on the field **Posting Date**

The Posting Date will default from the Posted Sales Invoice, Posting Date.

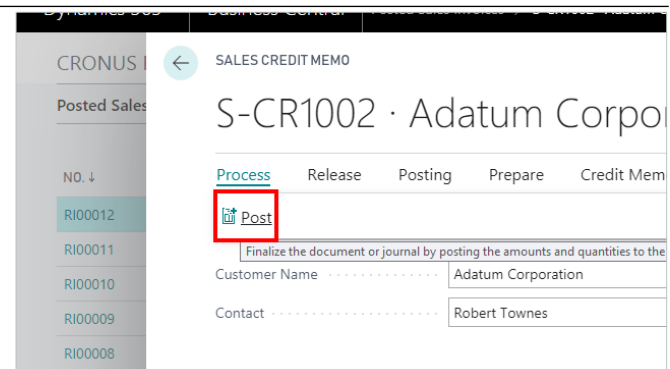
Should the date need to be different, then enter or lookup and select the date upon which the Credit Memo is to be posted.



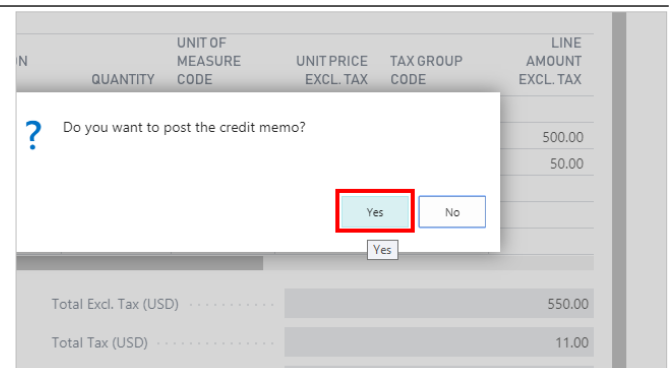
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Post**



Click on the button **Yes**





Click on the button **No**

On posting, the credit memo is automatically applied to the invoice which was selected.

3.24.2.2.3. How to Create a Corrective Rental Credit Memo for a Completed Contract Invoice

Profile - Sales Order Processor

When a user has the Business Manager profile, they can use basically the same steps provided here, with the exception of the initial steps to open the posted invoice.

The steps for the Business Manager Profile are noted below the steps for the Sales Order Processor Profile for accessing the posted invoices.

Should the user have the Business Manager Profile, then the Completed Rental Contract list is accessed in the menu option, Rentals.

Click on the navigation menu item popup **Posted Documents**

Click on the navigation menu item **Completed Rental Contracts**



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RC00006**

Completed Rental Contracts: All Search Contract Rental		
NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00003	10000	Adatum Corporation
RC00004	10000	Adatum Corporation
RC00005	10000	Adatum Corporation
RC00006	10000	Adatum Corporation
RC00008	10000	Adatum Corporation
RC00009	10000	Adatum Corporation
RC00010	10000	Adatum Corporation
RC00014	10000	Adatum Corporation

Click on the navigation menu item popup **Rental**

Dynamics 365Business CentralCompleted Rental Contracts > Rental Contract

CRONUS

←COMPLETED RENTAL CONTRACT

Rental Contract · RC00006

Rental

Navigate

Less options

General

Sell-to Customer Name

Adatum Corporation

Quote No.

Click on the navigation menu item **Posted Invoices**

COMPLETED RENTAL CONTRACT

Rental Contract · RC00006

Rental

Navigate

Less options

Posted Deliveries

Posted Returns

Posted Invoices

Sell-to Customer Name

Adatum Corporation

Quote No.

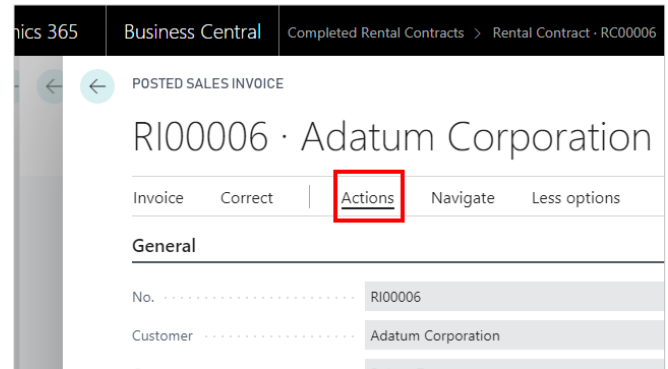
Posting Date

6/8/2018

Click on the link in cell **No.** with the value **RI00006**

Posted Sales Invoices			
Search Manage Invoice Correct Open			
NO.	CUSTOMER NO.	CUSTOMER	CURR CODE
RI00006	10000	Adatum Corporation	
RI00006 Open record "RI00006" in a new window			

Click on the navigation menu item popup **Actions**



Business Central Completed Rental Contracts > Rental Contract · RC00006

← POSTED SALES INVOICE

RI00006 · Adatum Corporation

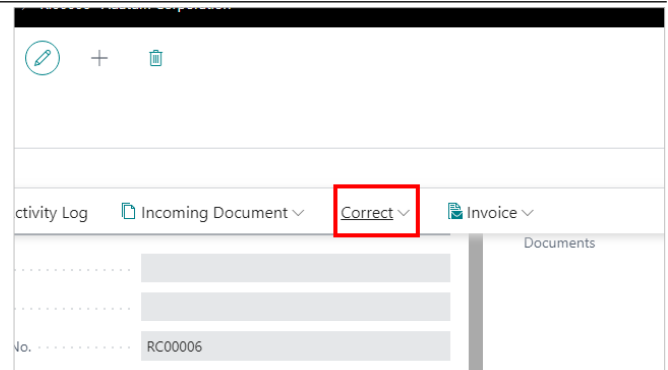
Invoice Correct **Actions** Navigate Less options

General

No. RI00006

Customer Adatum Corporation

Click on the navigation menu item popup **Correct**

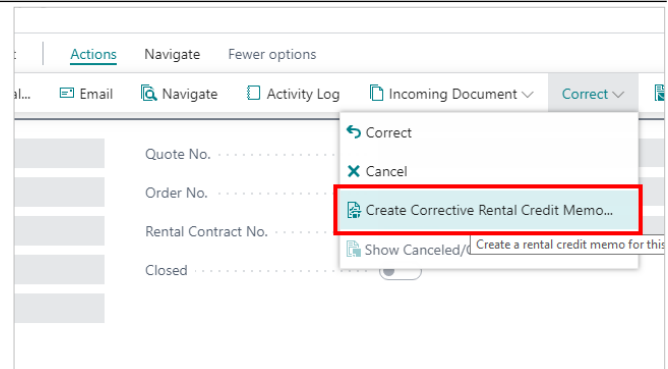


Activity Log Incoming Document **Correct** Invoice

Documents

No. RC00006

Click on the navigation menu item **Create Corrective Rental Credit Memo...**



Actions Navigate Fewer options

Email Navigate Activity Log Incoming Document **Correct**

Quote No.

Order No.

Rental Contract No.

Closed

Correct

Cancel

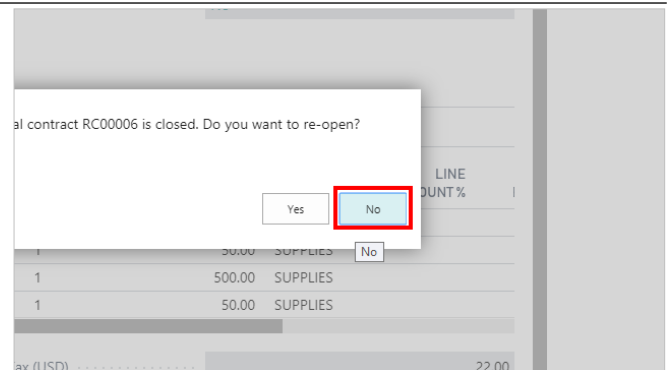
Create Corrective Rental Credit Memo...

Show Canceled/...

Create a rental credit memo for this

The following steps demonstrate what will occur, should the user decides the credit is not to re-open the contract.

Click on the button **No**



Contract RC00006 is closed. Do you want to re-open?

Yes **No**

LINE

QUANTITY

1 500.00 SUPPLIES

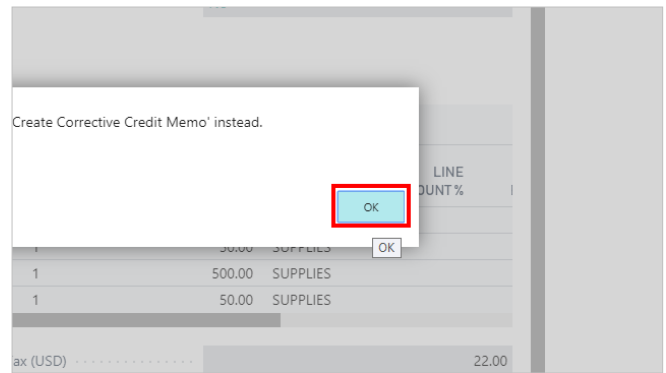
1 500.00 SUPPLIES

1 50.00 SUPPLIES

Tax (USD) 22.00

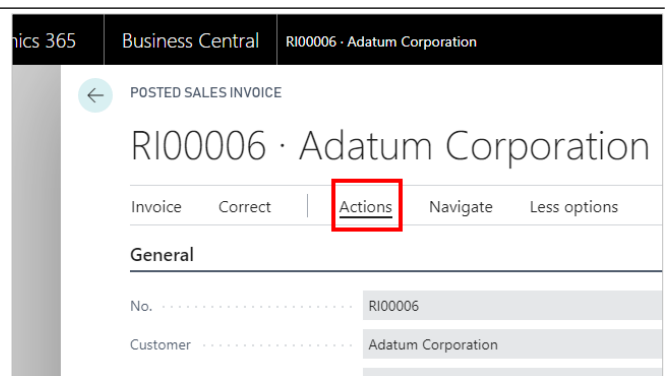
Click on the button **OK**

The pop-up message advises to use the Create Corrective Credit Memo instead.

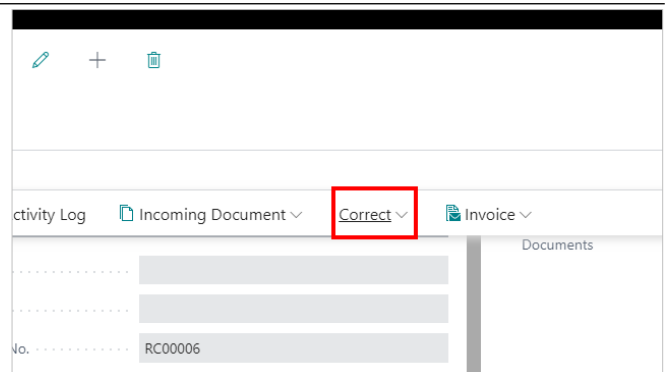


The following steps demonstrate what will occur if the user decides the credit should re-open the contract.

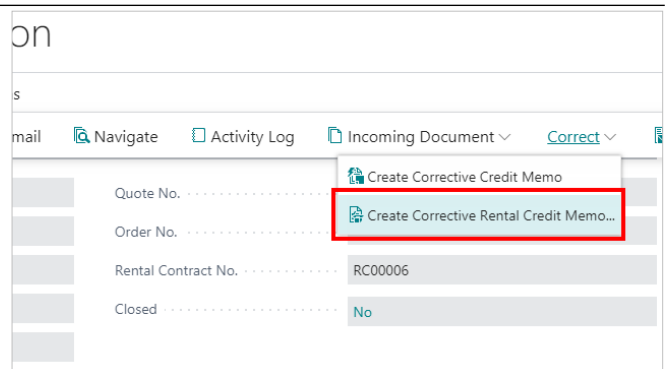
Click on the navigation menu item popup **Actions**



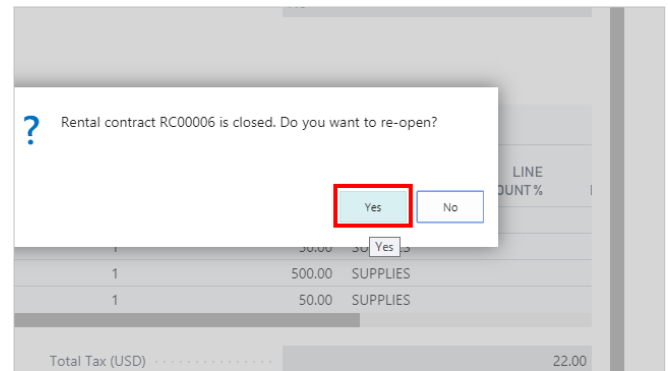
Click on the navigation menu item popup **Correct**



Click on the navigation menu item **Create Corrective Rental Credit Memo...**



Click on the button **Yes**



The Credit Memo will automatically open.

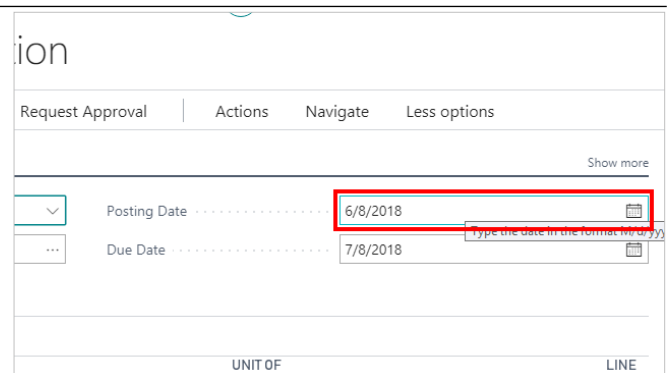
The Credit Memo lines cannot be modified or deleted when using the Create Corrective Rental Credit Memo.

This option is to be used strictly to fully reverse the invoice and re-open the Rental Amount Lines, which were billed on the invoice being credited. Thus enabling the rental contract lines to be modified and re-billing can be done for the same period.

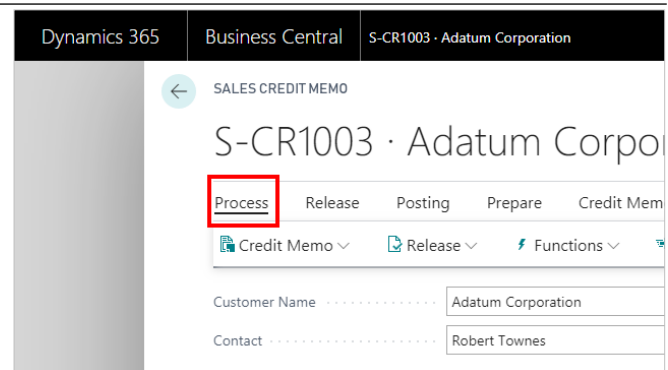
Click on the field **Posting Date**

The Posting Date will default from the Posted Sales Invoice, Posting Date.

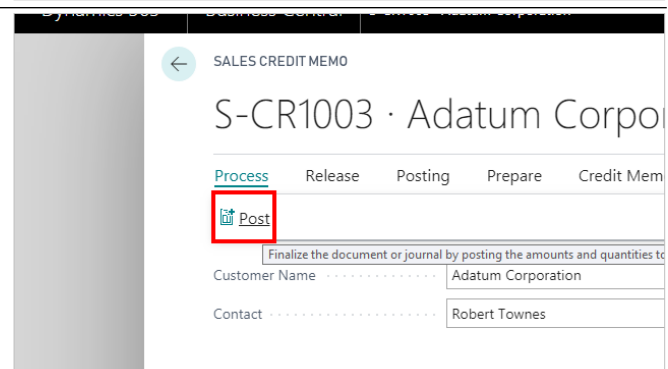
Should the date need to be different, then enter or lookup and select the date upon which the Credit Memo is to be posted.



Click on the navigation menu item popup **Process**



Click on the navigation menu item **Post**





Click on the button **Yes**

UNIT OF MEASURE	UNIT PRICE	TAX GROUP	LINE AMOUNT
QUANTITY <td>EXCL. TAX<td>CODE<td>EXCL. TAX</td></td></td>	EXCL. TAX <td>CODE<td>EXCL. TAX</td></td>	CODE <td>EXCL. TAX</td>	EXCL. TAX
			500.00
			50.00
			500.00
			50.00
Total Excl. Tax (USD)			1,100.00

Click on the button **No**

UNIT OF MEASURE	UNIT PRICE	TAX GROUP	LINE AMOUNT
QUANTITY	EXCL. TAX	CODE	EXCL. TAX
			500.00
			50.00
			500.00
			50.00
Total Excl. Tax (USD)			1,100.00

On posting, the credit memo is automatically applied to the invoice which was selected.

3.24.2.2.4. Reviewing the Unit Rental Value Entries

Profile - Sales Order Processor

When a user has the Business Manager profile, they can use the same steps provided here.

Click on the navigation menu item popup **Rentals**

Inventory ▾ Posted Documents ▾ **Rentals ▾** Self-Service ▾

Manage rental quotes and contracts. Maintain rental units. Sales credit memos. Sales return orders.

about

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order
- + Sales Return
- + Sales Credit Memo
- + Rental Quote

Click on the navigation menu item **Rental Units**

Sales ▾ Purchasing ▾ Inventory ▾ Posted Documents ▾ **Rentals ▾**

Contracts Rental Periods Rental Terms **Rental Units** Rental Registers Rental Invoices

learn more about Central?



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00004**

Select one of the units that is on the Rental Contract for which the rental credit memo was posted.

PG-001	Portable Generators	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	
RU00007	Cut-Off Gasoline Saw GRP - Hybrid	
RU00008	Cut-Off Gasoline Saw - Hybrid	

Click on the navigation menu item popup **Navigate**

Business Central	Rental Units > RU00004 · Buckeye Ditcher
UNIT CARD	
RU00004 · Buckeye Ditcher	
Business	Rental Page Actions Navigate Less options
Copy Rental Unit...	
General	
RU00004 Rental Category	

Click on the navigation menu item **Rental Value Entries**

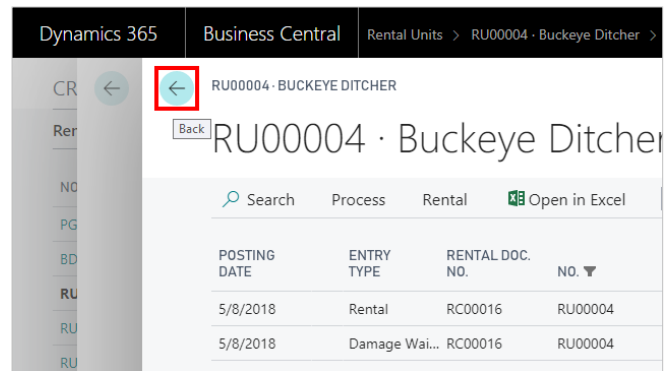
Buckeye Ditcher	
Actions	Navigate Less options
Additional Notes	Rental Ledger Entries Rental Value Entries
View the history of financial transactions that	
RU00004	Rental Category Code
Buckeye Ditcher	Search Description

Click on the cell **Cr. Memo No.** with the value **PS-CR104002**

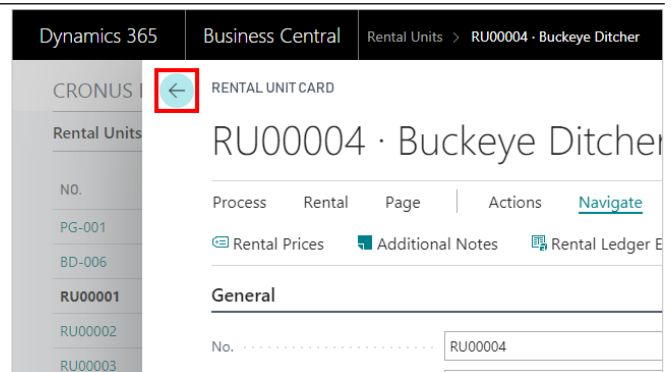
Note that the Credit Memo entry has been created on the Rental Unit.

SERIAL NO.	INVOICE NO.	INVOICE LINE NO.	CR. MEMO NO.	CR. MEMO LINE NO.	QUANTITY
BD-004	RI00012	20000		0	1
BD-004	RI00012	20000		0	1
BD-004		0	PS-CR104002	30000	1
BD-004		0	PS-CR104002	40000	1

Click on the back button



Click on the back button



3.24.2.2.5.

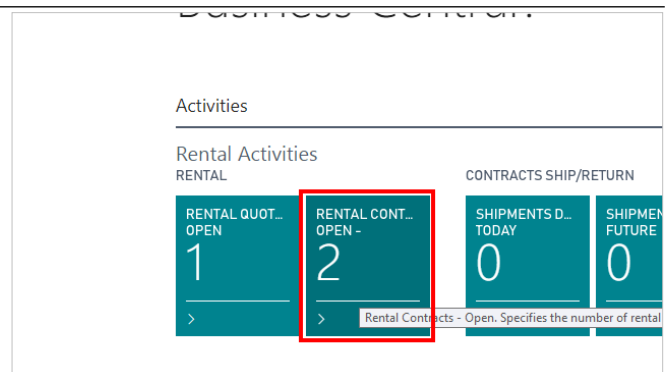
Reviewing the Rental Amount Lines on an Open Contract

Profile - Sales Order Processor

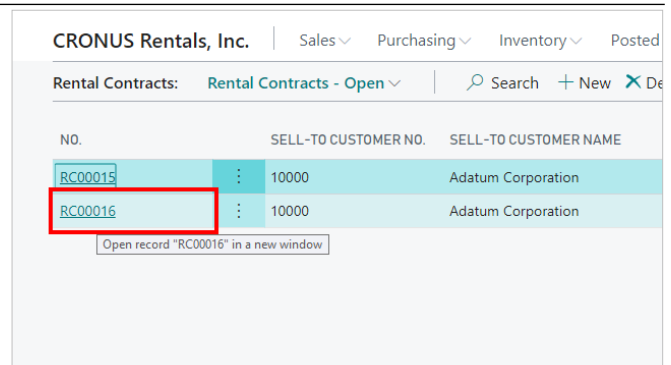
When a user has the Business Manager profile, they can use the same steps provided here.

When the Rental Contract is still open, complete the following steps to open the contract.

Click on the link **Rental Contracts- Open2**



Click on the link in cell **No.** with the value **RC00016**





Click on the cell **Rental Unit No.**

Select the Rental Line for which the invoice was credited.

The screenshot shows the 'Rental Lines' section of the software interface. At the top, there are tabs for 'Rental Lines' (selected), 'Manage', and 'More options'. Below the tabs are three icons: 'New Line', 'Delete Line', and 'Group Avail Matrix'. The main table has columns: 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The first row shows 'RU00001' and 'Buckeye Ditcher Group'. The second row shows 'RU00004' and 'Buckeye Ditcher', with this row highlighted in light blue. Below the table, there are tabs for 'Sales Lines' and 'Manage'.

Click on the navigation menu item **More options**

This screenshot shows the 'Rental Lines' section with the 'More options' tab selected. The 'More options' tab is highlighted with a red box. Below the tabs are three icons: 'New Line', 'Delete Line', and 'Group Avail Matrix'. The main table has columns: 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', 'DESCRIPTION', and 'RENTAL TERMS CODE'. The first row shows 'RU00001' and 'Buckeye Ditcher Group' with 'MONTH-PEND' in the terms code column.

Click on the navigation menu item popup **Line**

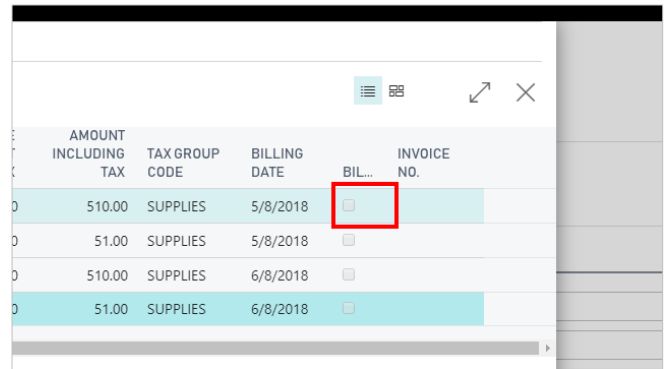
This screenshot shows the 'Rental Lines' section with the 'Line' tab selected. The 'Line' tab is highlighted with a red box. Below the tabs are three icons: 'New Line', 'Delete Line', and 'Group Avail Matrix'. The main table has columns: 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', 'DESCRIPTION', and 'RENTAL TERMS CODE'. The first row shows 'RU00001' and 'Buckeye Ditcher Group' with 'MONTH-PEND' in the terms code column.

Click on the navigation menu item **Rental Amount Lines**

This screenshot shows the 'Rental Amount Lines' section. At the top, there are tabs for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Less'. The 'Rental Amount Lines' tab is highlighted with a red box. Below the tabs are three icons: 'Rental Amount Lines', 'Rental Ledger Entries', and 'Rental'. The main table has columns: 'RENTAL UNIT NO.', 'STANDARD TEXT CODE', and 'DESCRIPTION'. The first row shows 'RU00001' and 'Buckeye Ditcher Group'. The second row shows 'RU00004' and 'Buckeye Ditcher'.

Click on the cell **Billed**

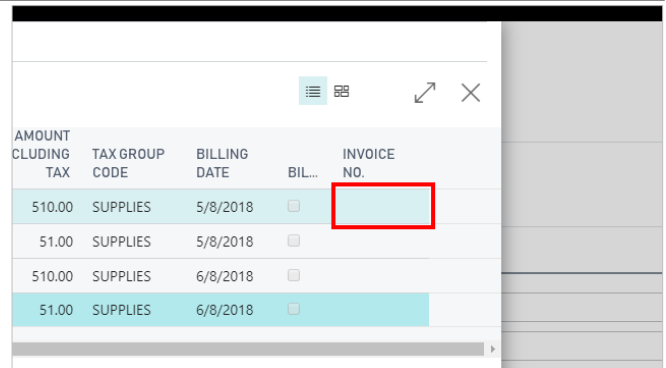
Note that the Billed field has been cleared on the Rental Amount Lines, which were previously invoiced.



AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

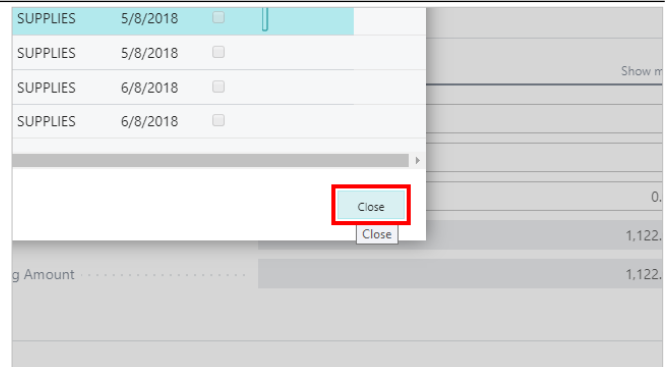
Click on the cell **Invoice No.**

Note that the Invoice No. field has been cleared on the Rental Amount Lines, which were previously invoiced.



AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

Click on the button **Close**



AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BIL...	INVOICE NO.
510.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	5/8/2018	<input type="checkbox"/>	
510.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	
51.00	SUPPLIES	6/8/2018	<input type="checkbox"/>	

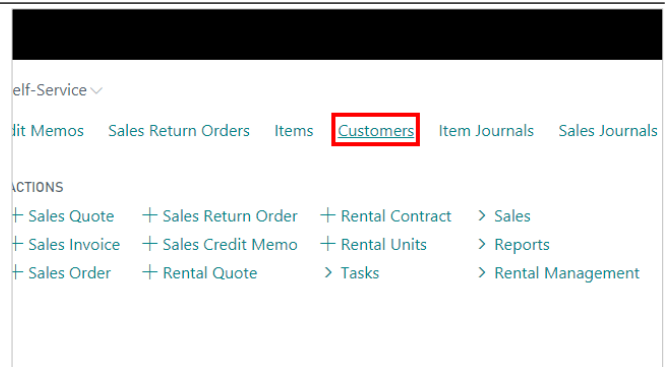
3.24.2.2.6.

Reviewing the Customer Ledger Entries

Profile - Sales Order Processor

When a user has the Business Manager profile, they can use the same steps provided here.

Click on the navigation menu item **Customers**







Navigation Menu
Self-Service
Edit Memos Sales Return Orders Items Customers Item Journals Sales Journals
ACTIONS
+ Sales Quote + Sales Return Order + Rental Contract > Sales
+ Sales Invoice + Sales Credit Memo + Rental Units > Reports
+ Sales Order + Rental Quote > Tasks > Rental Management



ODT Rentals Online Help

Click on the data brick **No. = 10000, Name = Adatum Corporation, Contact = Robert Townes**

Select the Customer for whom the credit memo was posted.

Dynamics 365		Business Central	Customers	
CRONUS Rentals, Inc.		Sales	Purchasing	Inventory
Customers:		All	Search	+ New X Delete Process Report
 10000 Adatum Corporation Robert Townes		20,283.52	 20000 Trey Research Helen Ray	
 50000 Relecloud Jesse Homer		8,836.80 5,754.96	 C00010 Joe Rental	

Click on the navigation menu item popup **Navigate**

10000 · Adatum Corporation	
Adatum Corporation	
Approval	Customer
Actions	Navigate
Report	Less options
Adatum Corporation	Total Sales
20,283.52	Costs (\$)

Click on the navigation menu item popup **History**

CRONUS		CUSTOMER CARD	
Customers:		10000 · Adatum Corporation	
New Document		Request Approval	Customer
Customer		History	Prices and Discounts
Name		Adatum Corporation	
Balance (\$)			
Balance Due (\$)			

Click on the navigation menu item **Ledger Entries**

CRONUS		CUSTOMER CARD	
Customers:		10000 · Adatum Corporation	
New Document		Request Approval	Customer
Customer		History	Prices and Discounts
Name		Adatum Corporation	
Balance (\$)			
Balance Due (\$)			
Credit Limit (\$)			
		Ledger Entries	
		View the history of transactions that have been po	
		Sales	
		Entry Statistics	
		Statistics by Currencies	



Click on the cell **Document No.** with the value **PS-CR104002**

Note that the Credit Memo has been posted to the Customer.

Customer Ledger Entries

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	CUSTOMER NO. ▼	MESSAGE TO REC
5/8/2018	Credit Memo	PS-CR104002	10000	
5/8/2018	Invoice	RI00012	PS-CR104002	
5/8/2018	Credit Memo	PS-CR104001	10000	
5/5/2018	Invoice	RI00011	10000	
5/8/2018	Invoice	RI00010	10000	
4/9/2018	Invoice	RI00009	10000	
5/15/2018	Invoice	RI00008	10000	

Click on the cell **Document No.** with the value **RI00012**

Select the Document No. with the Invoice No. that the Credit Memo was created and posted for.

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	CUSTOMER NO. ▼	MESSAGE TO REC
5/8/2018	Credit Memo	PS-CR104002	10000	
5/8/2018	Invoice	RI00012	10000	
5/8/2018	Credit Memo	PS-CR104001	10000	
5/5/2018	Invoice	RI00011	10000	
5/8/2018	Invoice	RI00010	10000	
4/9/2018	Invoice	RI00009	10000	
5/15/2018	Invoice	RI00008	10000	
5/17/2018	Invoice	RI00007	10000	

Click on the link in cell **Remaining Amt. (\$)** with the value **0.00**

Note that the Remaining Amt. (\$) has been reduced on the invoice by the Credit Memo amount.

Note that the Remaining Amt. (\$) now displays 0.00.

When clicking on the amount in the Remaining Amt. (\$) field, the Detailed Customer Ledger Entries page will open.

POSTING DATE	REMAINING AMOUNT	REMAINING AMT. (\$)	DUE DATE	PMT. DISCOUNT DATE	PAID TO DATE
5/8/2018	0.00	0.00	6/8/2018		
5/8/2018	0.00	0.00	5/8/2018	5/16/2018	5/16/2018
5/8/2018	0.00	0.00	5/8/2018		
5/5/2018	10,200.00	10,200.00	6/5/2018	5/13/2018	5/13/2018
5/8/2018	1,020.00	1,020.00	6/8/2018	5/16/2018	5/16/2018
4/9/2018	163.20	163.20	5/9/2018	4/17/2018	4/17/2018
5/15/2018	1,250.32	1,250.32	6/15/2018	5/23/2018	5/23/2018
5/17/2018	1,428.00	1,428.00	6/17/2018	5/25/2018	5/25/2018

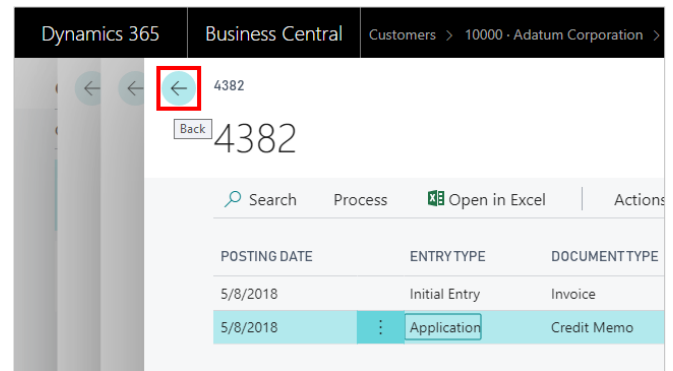
Click on the cell **Entry Type** with the value **Application**

Note that the Credit Memo has been applied to the invoice.

Detailed Customer Ledger Entries

POSTING DATE	ENTRY TYPE	DOCUMENT TYPE	DOCUMENT NO.
5/8/2018	Initial Entry	Invoice	RI00012
5/8/2018	Application	Credit Memo	PS-CR104002

Click on the back button



Dynamics 365 Business Central Customers > 10000 · Adatum Corporation >

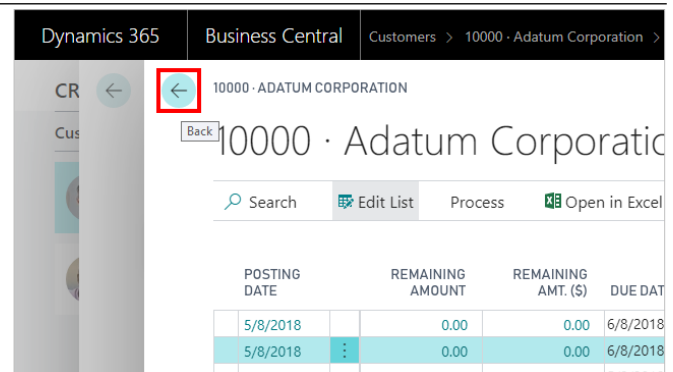
4382

Back 4382

Search Process Open in Excel Actions

POSTING DATE	ENTRY TYPE	DOCUMENT TYPE
5/8/2018	Initial Entry	Invoice
5/8/2018	Application	Credit Memo

Click on the back button



Dynamics 365 Business Central Customers > 10000 · Adatum Corporation >

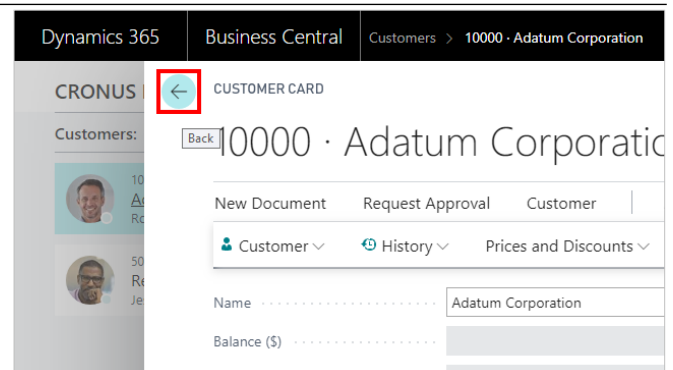
10000 · ADATUM CORPORATION

Back 10000 · Adatum Corporation

Search Edit List Process Open in Excel

POSTING DATE	REMAINING AMOUNT	REMAINING AMT. (\$)	DUE DATE
5/8/2018	0.00	0.00	6/8/2018
5/8/2018	0.00	0.00	6/8/2018

Click on the back button



Dynamics 365 Business Central Customers > 10000 · Adatum Corporation >

CRONUS CUSTOMER CARD

Back 10000 · Adatum Corporation

New Document Request Approval Customer

Customer History Prices and Discounts

Name Adatum Corporation

Balance (\$)

3.24.3. Rental Auto Credit Memos

3.24.3.1. How to Set Up for Auto Credit Memos

3.24.3.1.1. Overview

There are five fields available for setting up the Auto Credit Memo on Rental Management Setup.

- **Enable Auto Credit**, which must be enabled to activate the automatic creation of Credit Memos for rental terms having an Invoice Type of Start or Periodic Start. When enabled and any of the that are on rent units, or a unit with multiple quantities has a partial return processed earlier that the end billing date on an invoice a Credit Memo will be created.
- **1 Credit Memo/Return**, which when enabled if there have been multiple returns on a contract on the same date that are related to different invoices, then only 1 Credit Memo is created with the lines containing the Invoice number and credit amount(s) for each invoice. If not enabled, then individual Credit Memo will be created for each invoice.
- **Auto Post Auto Credit**, which when enabled will automatically post the Sales Credit Memo. When not enabled, then the user will need to open the Sales Credit Memo and post it.
- **Auto Credit Reason Code**, which provides the ability to specify a default Reason Code that will be assigned to all automatically created Credit Memos when the Auto Post Auto Credit field is enabled. In the North America version of Microsoft Dynamics 365 Business Central this is not mandatory. This may be

mandatory in some countries using the Global (rest of World) Microsoft Dynamics 365 Business Central.

- **Auto Credit Type for Opt.**, which provides two options, Optimize and Prorate for when the rental term on the rental line has the Invoicing Type of Optimize enabled.

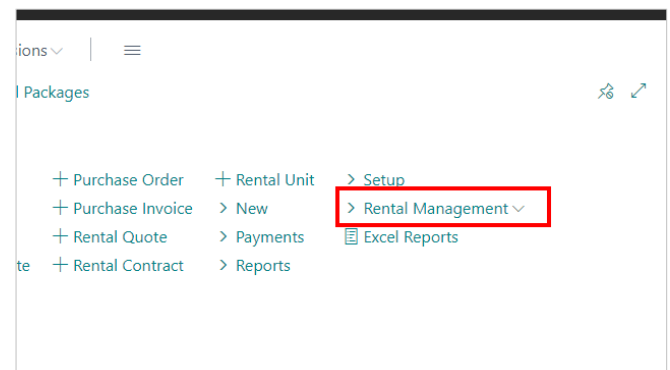
When the setting is Optimize, then the calculation of the credit amount is based on the difference between what had been invoiced, and what would have been invoiced, if the return date had initially been set to the date that the return is being processed on.

When the setting is Prorate, then a daily rate will be calculated based on the rental unit price divided by the number of days in the rental period. Then the credit amount is calculated as the daily rate multiplied by number of days the rental unit was returned early.

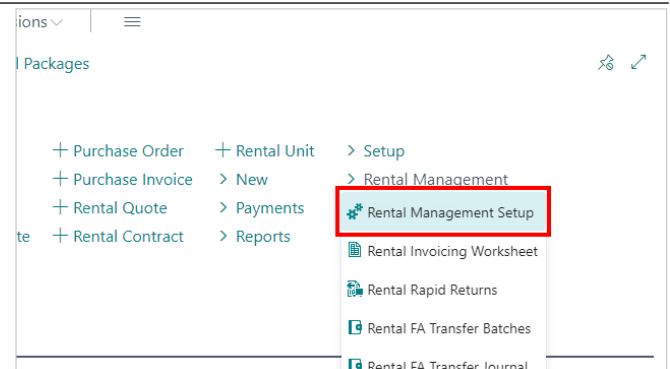
3.24.3.1.2. How to Setup Rental Management Setup for Auto Credit Memos

The following demonstrates the setup for Rental Management Setup for Auto Credit Memos.

Click on the navigation menu item popup **Rental Management**

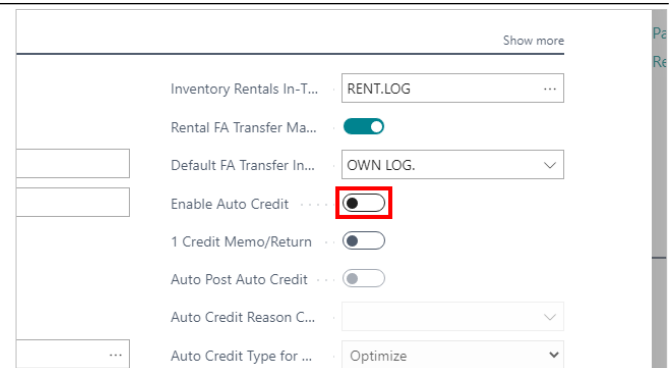


Click on the navigation menu item **Rental Management Setup**



Click on the toggle field **Enable Auto Credit**

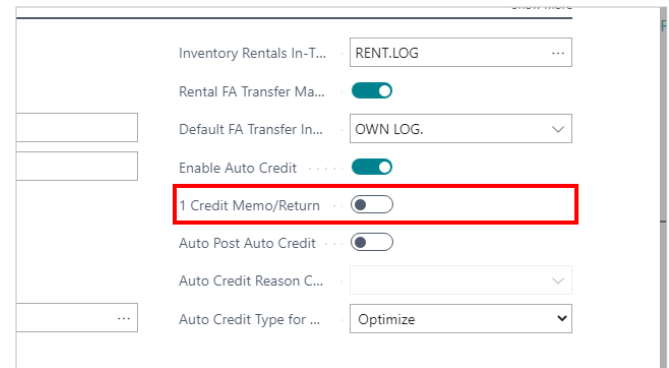
In order to use the Auto Credit Memo feature, this field must be enabled.



Click on **1 Credit Memo/Return**

When enabled, specifies one credit memo per return is created when posting returns including multiple invoices.

If not enabled, then if early returns of multiple Rental Units which have different invoices are processed on the same date, then an individual credit memo will be generated for each applicable invoice.



Inventory Rentals In-T... RENT.LOG ...

Rental FA Transfer Ma... ☒

Default FA Transfer In... OWN LOG. ▾

Enable Auto Credit ☒

1 Credit Memo/Return ☒

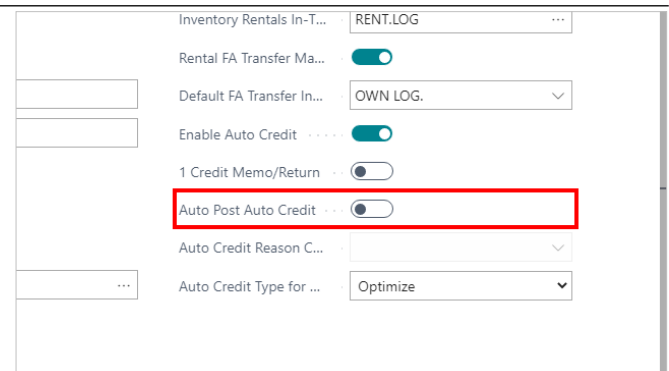
Auto Post Auto Credit ☐

Auto Credit Reason C... ▾

Auto Credit Type for ... Optimize ▾

Click on **Auto Post Auto Credit**

Should your organization prefer to have the Sales Credit Memos automatically post, then enable the toggle field.



Inventory Rentals In-T... RENT.LOG ...

Rental FA Transfer Ma... ☒

Default FA Transfer In... OWN LOG. ▾

Enable Auto Credit ☒

1 Credit Memo/Return ☐

Auto Post Auto Credit ☒

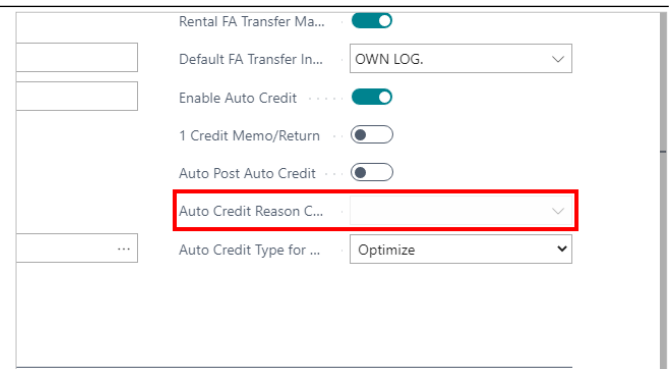
Auto Credit Reason C... ▾

Auto Credit Type for ... Optimize ▾

Click on **Auto Credit Reason Code**

When the Auto Post Auto Credit is enabled, then the Auto Credit Reason Code field can be used to select a Reason Code to be automatically assigned to the Sales Credit Memo.

This field is not mandatory in North America, however, some countries using the Global (Rest of World) version do require the Reason Code.



Rental FA Transfer Ma... ☒

Default FA Transfer In... OWN LOG. ▾

Enable Auto Credit ☒

1 Credit Memo/Return ☐

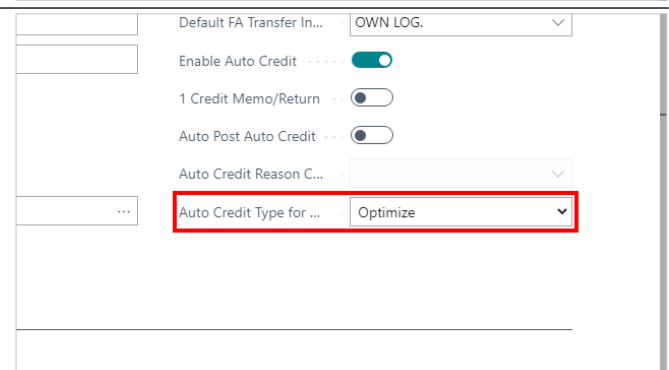
Auto Post Auto Credit ☐

Auto Credit Reason C... ▾

Auto Credit Type for ... Optimize ▾

Click on **Auto Credit Type for Opt Optimize Prorate**

Should your organization be using Rental Terms with Optimize enabled, then the preferred method of calculating the credit amount will need to be selected.



Default FA Transfer In... OWN LOG. ▾

Enable Auto Credit ☒

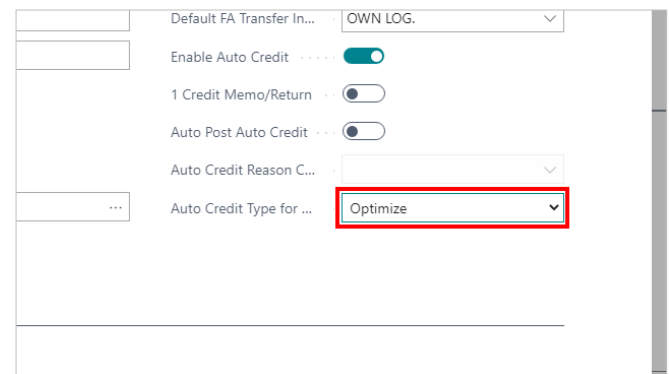
1 Credit Memo/Return ☐

Auto Post Auto Credit ☐

Auto Credit Reason C... ▾

Auto Credit Type for ... Optimize ▾

Click on the field **Auto Credit Type for Opt**



Default FA Transfer In... OWN LOG.

Enable Auto Credit ☒

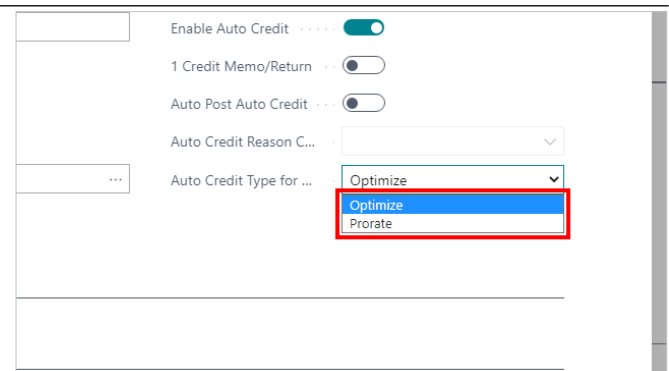
1 Credit Memo/Return ☐

Auto Post Auto Credit ☐

Auto Credit Reason C...

Auto Credit Type for ... **Optimize**

Click on the item **Optimize** in the list
Select the preferred method of calculating the credit amount for optimized rental terms.



Enable Auto Credit ☒

1 Credit Memo/Return ☐

Auto Post Auto Credit ☐

Auto Credit Reason C...

Auto Credit Type for ... **Optimize**

3.24.3.2. Processing Early Returns with Auto Credit Memo

3.24.3.2.1. Overview

The Auto Credit functionality for Start and Periodic Start rental terms/pricing generates Sales Credit Memos for full and partial returns. The credit memos can be either automatically posted, or require the user to review and post the credit memo.

Upon the posting of the Sales Credit Memo, in addition to the standard entries created when posting a credit memo, a Rental Value Entry is created in the Rental Value Entries related to the unit on the contract. Therefore ensuring the revenue related to the unit will reflect the net amount of revenue.

Should multiple partial returns be processed that are related to a single invoice, then the Rental Value Entries for each of the partial returns will be displayed on the applicable rental line for the partial return of the unit.

From the Posted Sales Credit Memo, a Rental Credit Memo can be printed, emailed or sent to the customer. The Rental Credit Memo is formatted similar to the Rental Invoice.

IMPORTANT:

- When processing a partial return with Auto Credit enabled, and the return is after an invoice has been posted, the Partial Return Date cannot be earlier than the Starting Date-Time related to the invoice to which the credit will be applied. This is applicable even if the Shipment Date and Rental Start Date are earlier.
- The Auto Credit Memo feature currently does not include the generation of Credit Memos for Rental Packages when all components in the package are returned early on the same date.

3.24.3.2.2. Processing an Early Return without Auto Post Enabled

The following example demonstrates the processing an early return, when the Auto Credit Memo field is enabled. And the fields, 1 Credit Memo/Return and Auto Post Auto Credit on Rental Management Setup are not enabled.

Rental Contract Information:

- The length of the contract is from April 6 to June 5 and the return day is billable.
- A Rental Unit was entered on the rental line with a monthly rental term with an invoicing type of Periodic Start for recurring billing, with a rental unit price of 150.00 per month.



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- The Rental Unit was shipped and invoiced on April 6
- The Rental Unit will be returned early on April 30

Expected Results:

- When the Rental Return is processed, the rental contract will close, as it will be completed.
- The Sales Credit Memo will be created, however, will not be posted.
- The credit amount calculated will be based a prorated amount. The calculation is based on the number of days to be credited for the rental period = 5 of 30 as April has 30 days. The credit amount = ((days to credit divided by days in the rental period) times the rental quantity)) times the rental unit price. $((5/30) \times 1) \times 150.00 = 25.00$. Therefore the credit amount for this example will be 25.00.
- When the Sales Credit Memo is posted, a Rental Value Ledger Entry will be created on the completed contract rental line for the unit.

The following picture displays the rental line.

Rental Lines		Manage	Line	Functions	Related	Fewer options															
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa.	
→ RU00008-001	:	18 G Brad Nailer	MONTH-PSTART	1	EAST			4/6/2020	6/5/2020	150.00	0.00	0.00		SUPPLIES	0	1	0	0	0	✓	

The following picture displays the Rental Amount Line after the invoice for the first rental period was posted.

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.
Rental	4/6/2020 12:00 AM	5/5/2020 11:59 PM	1	150.00	150.00		153.00	SUPPLIES	4/6/2020	☑	RI00001
Rental	:	5/6/2020 12:00 AM	6/5/2020 11:59 PM	1	150.00		153.00	SUPPLIES	5/6/2020	☐	

The following demonstrates:

- The returning of the rental unit earlier than the Ending Date-Time on the Rental Amount Line which was invoiced.
- The posting of the Sales Credit Memo and the steps for printing, sending or emailing the Rental Credit Memo.
- Reviewing the Rental Value Entries on the Completed Rental Contract

Click on the field **Posting Date**

il	Actions	Related	Fewer options
Adatum Corporation			
4/6/2020			
4/6/2020			
4/6/2020			

Click on the link **Open the date picker for Posting Date**

ns	External Document No.
on	Rental Terms Code
	Deposit Amount
	Contract Total
	Outstanding Amount



ODT Rentals Online Help

Click on a date in the calendar

Select April 30, which is the date the unit is being returned on.

4/6/2020

April 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Go to today Done

Stand...	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	18 G Brad Nailer	MONTH-PSTART	1	EAST		

Click on the cell **Rental Return Date** with the value **6/5/2020**

Enter 04/30/2020, which is the date the unit is being returned early on.

Qty	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
1	EAST			4/6/2020	6/5/2020	150.00	0.00	0.00	

Click on the cell **Qty. to Return** with the value **0**

Enter the quantity 1.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa..
0.00		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

Rental Contract | Work Date: 4/6/2020

Rental Contract · RC00001

Process Contract **Rental** Actions Related Fewer options

General

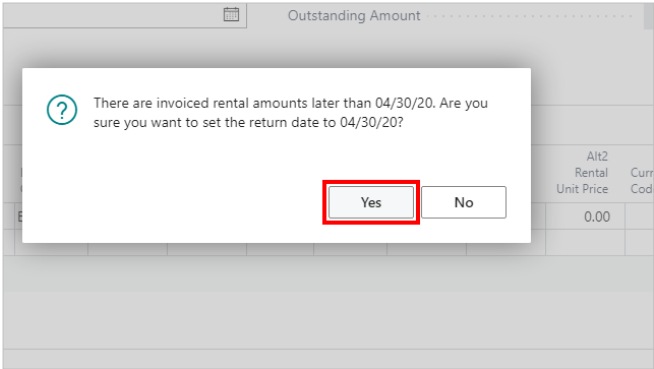
Sell-to Customer Name Adatum Corporation

Quote No.

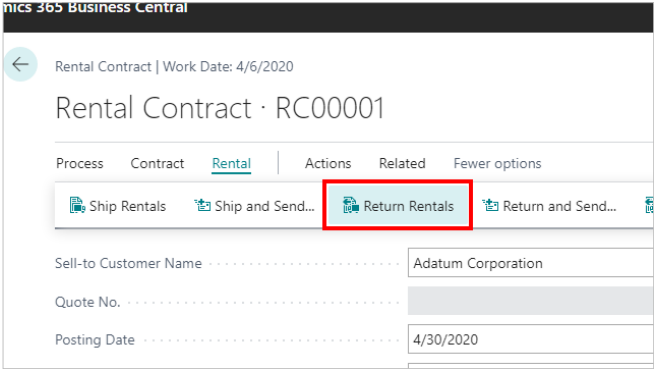
Posting Date 4/30/2020



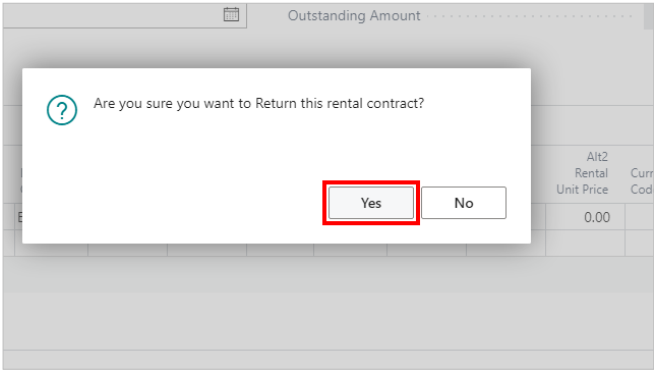
Click on the button **Yes**



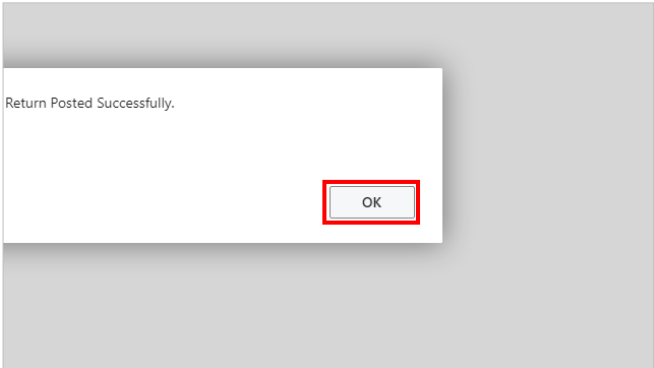
Click on the navigation menu item **Return Rentals**



Click on the button **Yes**



Click on the button **OK**





Click on the navigation menu item popup **Rentals**

Business Central

CRONUS Rentals, Inc. | Rentals Finance Cash Management

Customers Vendors Items Bank

Manage rental quotes and contracts. Maintain rental

Headline

Want to learn more about Business Central?

Click on the navigation menu item popup **Sales**

Sales Finance Cash Management Sales Purchasing Setup & Extension

Accounts Chart of Accounts Rental Periods Rental Terms Rental Units Rental P

g!

Actions

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

Click on the navigation menu item **Sales Credit Memos**

S Rentals, Inc. | Rentals Finance Cash Management Sales Pur

rs Item Charges Sales Orders Sales Invoices Sales Return Orders

Sales Quotes Blanket Sales Orders Sales Credit Memos Reminders

od evening!

Click on the link in cell **No.** with the value **S-CR1001**

Customers Item Charges Sales Orders Sales Invoices Sales R

Items Sales Quotes Blanket Sales Orders Sales Credit Memos Reminc

Sales Credit Memos: All Search + New Delete Release Post

No. ↑	Sell-to Customer No.	Sell-to Customer Name
S-CR1001	10000	Adatum Corporation

Note in the following picture of the Sales Credit Memo that the Unit Price Excl. Tax is 25.00 as expected.



Sales Credit Memo created by the early return

Sales Credit Memo | Work Date: 4/6/2020

S-CR1001 · Adatum Corporation

Release Posting Credit Memo Request Approval Navigate Actions Related Fewer options

General

Customer Name Adatum Corporation Due Date

Contact Robert Townes Status

Posting Date 4/30/2020 [Calendar Icon]

Lines Manage More options

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code
→ Comment		Invoice No. R100001;					
G/L Account	40100	Income Services	EAST	1		25.00	ATLANTA, GA

Click on the navigation menu item popup **Posting**

Dynamics 365 Business Central

← Sales Credit Memo | Work Date: 4/6/2020

S-CR1001 · Adatum Corporation

Release **Posting** Credit Memo Request Approval Navigate Action

General

Customer Name Adatum Corporation Due Date

Contact Robert Townes Status

Posting Date 4/30/2020 [Calendar Icon]

Click on the navigation menu item **Post**

Dynamics 365 Business Central

← Sales Credit Memo | Work Date: 4/6/2020

S-CR1001 · Adatum Corporation

Release **Posting** Credit Memo Request Approval Navigate Action

Post Post and Send... Preview Posting

Customer Name Adatum Corporation Due Date

Contact Robert Townes Status

Posting Date 4/30/2020 [Calendar Icon]

Click on the button **Yes**

Unit of Unit Price Excl. Tax Group Line Amount Excl. Tax

Do you want to post the credit memo?

Yes No

25.00 Total Excl. Tax (USD)

0.00 Total Tax (USD)

0 Total Incl. Tax (USD)

Click on the button **Yes**

Unit of Unit Price Excl. Tax Group Line Amount Excl. Tax

The credit memo is posted as number PS-CR104001 and moved to the Posted Sales Credit Memos window.

Do you want to open the posted credit memo?

Yes No

25.00 Total Excl. Tax (USD)

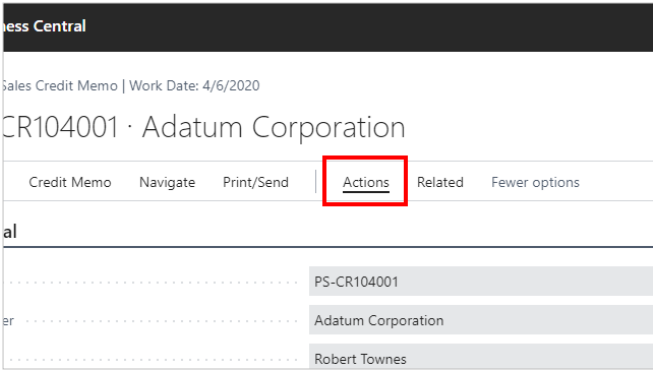
0.00 Total Tax (USD)

0 Total Incl. Tax (USD)

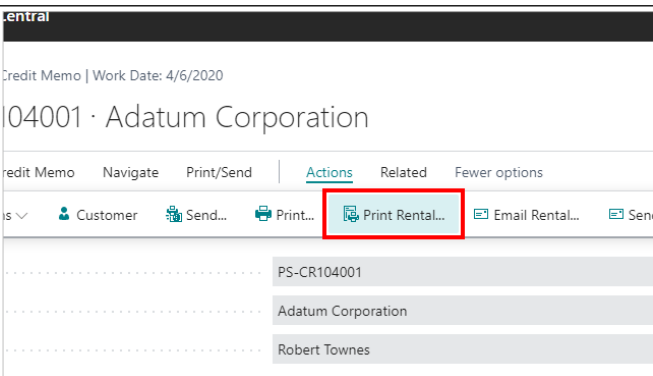


ODT Rentals Online Help

Click on the navigation menu item popup **Actions**

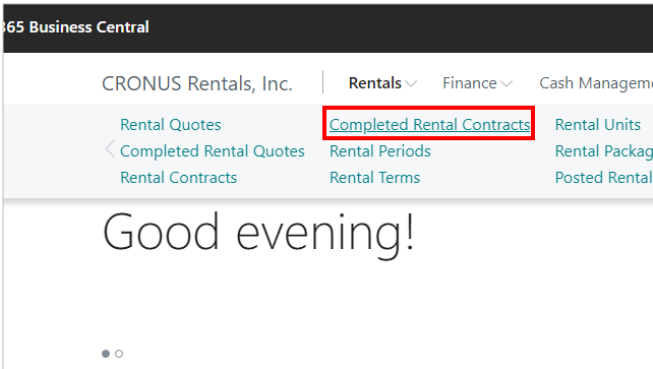


Click on the navigation menu item **Print Rental...**
Select the preferred method of Print Rental Credit Memo, Email Rental Credit Memo or Send Rental Credit Memo.

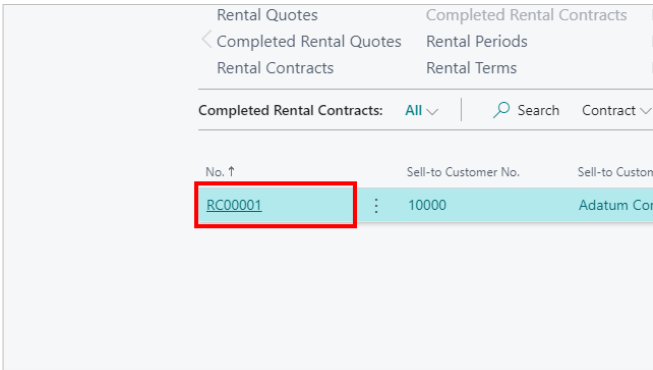


The following demonstrates the review of the Completed Rental Contract, Rental Value Entries, which will now contain a record for the credit memo which was posted.

Click on the navigation menu item **Completed Rental Contracts**



Click on the link in cell **No.** with the value **RC00001**





ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/30/2020

Order Date 4/6/2020

Document Date 4/30/2020

Rental Lines | **Line**

Rental Unit No.	Description	Rental Terms Code	Rental Qu
→ RU00008-001	18 G Brad Nailer	MONTH-PST...	

Click on the link **Rental Value Entries**

Date 4/6/2020

ment Date 4/30/2020

Rental Lines | **Line**

Rental Amount Lines | Rental Ledger Entries | **Rental Value Entries** | Metered Usage Ent

RU00008-001	18 G Brad Nailer	MONTH-PST...	1	EAST
-------------	------------------	--------------	---	------

Click on the link in cell **Cr. Memo No.** with the value **PS-CR104001**

View - Rental Value Entries

Search Process Rental Open in Excel Actions Related F

Posting Date	Invoice Line No.	Cr. Memo No.	Cr. Memo Line No.	Quantity
4/6/2020	10000		0	1
4/30/2020	0	PS-CR104001	10000	1

Click on the cell **Unit Price** with the value **-25.00**

ies

Open in Excel Actions Related Fewer options

Cr. Memo No.	Cr. Memo Line No.	Quantity	Unit Price	Amount	Amou Including T.
	0	1	150.00	150.00	153.0
PS-CR104001	10000	1	-25.00	-25.00	-25.0

NOTE

When on Rental Management Setup the Auto Post Auto Credit is enabled, the steps are the same except the user does not have to look-up and post the Sales Credit Memo. It will automatically be posted.

3.24.3.2.3.

Optimize

Processing an Early Return with Auto Credit Type for Opt. =

The following example demonstrate the Auto Credit Memo for an early return, when the Rental Term has the Optimize field enabled, and Rental Management setup has the following setups.

Rental Management Setup Information:



- Auto Credit is enabled
- Auto Post Auto Credit is enabled
- Auto Credit Type for Opt. is set to Optimize

Rental Terms Setup for Optimize:

The rental terms setup include a daily, weekly and a monthly term with an Invoicing Type = Periodic Start and Optimize = All Periods.

The configuration of the terms is as follows.

The Rental Prices on the Rental Unit are:

- Day = 25.00
- Week = 150.00
- Month = 500.00

Daily Start Optimized Rental Term

...tal Terms Card | Work Date: 4/30/2020

DAY-START-OPT

General

Code	DAY-START-OPT	Period Code	DAY
Description	Daily Rental for Optimized Billing	Invoicing Period Code	DAY
Invoice Type	Start	Early Billing Date For...	
Optimize	All Periods	Rental Date Time Trac...	Track Date Only
Prorate	Never	Linked Term	
Rental Terms Code Alt1	WEEK-START-OPT	Summarize Rental Lines	<input type="checkbox"/>
Rental Terms Code Alt2	MONTH-START-OPT		

Weekly Start Optimized Rental Term

...tal Terms Card | Work Date: 4/30/2020

WEEK-START-OPT

General

Code	WEEK-START-OPT	Period Code	WEEK
Description	Weekly Rental for Optimized Billin	Invoicing Period Code	WEEK
Invoice Type	Start	Early Billing Date For...	
Optimize	All Periods	Rental Date Time Trac...	Track Date Only
Prorate	Never	Linked Term	
Rental Terms Code Alt1	DAY-START-OPT	Summarize Rental Lines	<input type="checkbox"/>
Rental Terms Code Alt2	MONTH-START-OPT		

Monthly Start Optimized Rental Term

...tal Terms Card | Work Date: 4/30/2020

MONTH-START-OPT

General

Code	MONTH-START-OPT	Period Code	MONTH
Description	Monthly Rental for Optimized Billi	Invoicing Period Code	MONTH
Invoice Type	Start	Early Billing Date For...	
Optimize	All Periods	Rental Date Time Trac...	Track Date Only
Prorate	Never	Linked Term	
Rental Terms Code Alt1	DAY-START-OPT	Summarize Rental Lines	<input type="checkbox"/>
Rental Terms Code Alt2	WEEK-START-OPT		

Rental contract information:

- The length of the contract is from March 31 to April 30 and the return day is billable.
- A Rental Unit will be entered on the rental line with a MONTH-START-OPT rental term, a rental quantity of 1.
- The rental unit price is 500.00 per month, with the alternative terms and prices of DAY-START-OPT = 25.00 and WEEK-START-OPT = 150.00.
- The Rental Unit will be shipped and invoiced on March 31.
- The Rental Unit will be returned early on April 20.

Expected Results

- When the Rental Return is processed, the rental contract will close, as it will be completed.



ODT Rentals Online Help

- The Sales Credit Memo will be created and posted.
- The credit amount calculated will be an optimized amount. Had the return day originally been set to April 20, then the billing would have been the weekly rate x 3 (150x3) = 450.00 as the Return Day Billable is checked. Therefore the credit amount for this example will be 500.00 minus 450.00 = 50.00.
- A Rental Value Ledger Entry will be created on the completed contract rental line for the unit.

The following picture displays the rental line.

Rental Lines																
Manage Line Functions Related Fewer options																
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent
→ RU00030-001	:	Portable Generators	MONTH-START...	1	EAST	DAY-STAR...	WEEK-ST...	3/31/20...	4/29/2020	500.00	25.00	150.00		SUPPLIES	0	1

The following picture displays the Rental Amount Line after the invoice for the contract was posted.

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.
Rental	:	3/31/2020 12:00 AM	4/29/2020 11:59 PM	1	500.00	500.00	525.00	SUPPLIES	3/31/2020		RI00002

The following demonstrates:

- The early return of the rental unit on April 20.
- The reviewing of the Posted Sales Invoice.
- The reviewing of the Rental Value Entries on the Completed Rental Contract.

Click on the field **Posting Date**

Actions Related Fewer options

Adatum Corporation

3/31/2020

3/31/2020

3/31/2020

Click on the link **Open the date picker for Posting Date**

ns

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

3/31/2020

March 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31



ODT Rentals Online Help

Click on a date in the calendar
Select the date that the return entries and credit
memo are to have as a Posting Date.

Date	3/31/2020																																															
Posting Date	<div>April 2020</div> <table><tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr><tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td></tr></table> <div>Go to today Done</div>						Su	Mo	Tu	We	Th	Fr	Sa				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
Su	Mo	Tu	We	Th	Fr	Sa																																										
			1	2	3	4																																										
5	6	7	8	9	10	11																																										
12	13	14	15	16	17	18																																										
19	20	21	22	23	24	25																																										
26	27	28	29	30																																												
Lines	Manage	Line	Functions																																													
Unit	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Term Code																																										
030-001	:	Portable Generators	MONTH-START...	1	EAST	DAY-																																										

Click on the cell **Rental Return Date** with the value **4/29/2020**

al ty	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
1	EAST	DAY-STAR...	WEEK-ST...	3/31/20...	4/29/2020	500.00	25.00	150.00	
Type the date in the format M/d/yyyy									

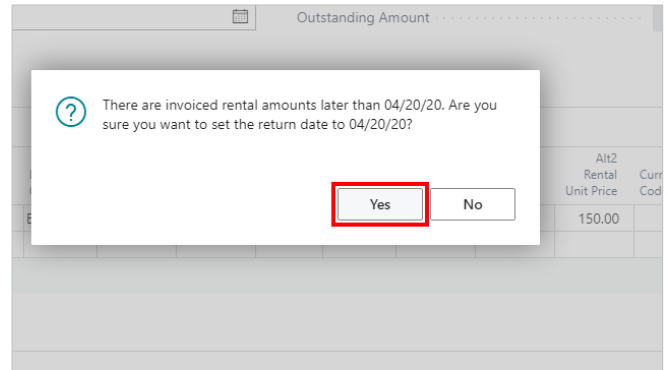
Click on the link in cell **Rental Return Date** with the value **4/29/2020**

al ty	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	C
1	EAST	DAY-STAR...	WEEK-ST...	3/31/20...	4/29/2020	500.00	25.00	150.00	
Open the date picker for Rental Return Date									

Click on a date in the calendar
Select the date that the Rental Unit is being returned
early on. For this example, select April 20.

Location Code	Terms Code Alt1	Terms Code Alt2	Start Date	Return Date	Rental Unit Price	Rental Unit Price	Rental Unit Price	Curre... Code																																											
AST	DAY-STAR...	WEEK-ST...	3/31/20...	4/29/2020	500.00	25.00	150.00																																												
<div><div>April 2020</div><table><tr><td>Su</td><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td></tr><tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr><tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr><tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr><tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td></tr></table><div>Go to todayDone</div></div>									Su	Mo	Tu	We	Th	Fr	Sa				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Su	Mo	Tu	We	Th	Fr	Sa																																													
			1	2	3	4																																													
5	6	7	8	9	10	11																																													
12	13	14	15	16	17	18																																													
19	20	21	22	23	24	25																																													
26	27	28	29	30																																															
Quantity	Unit of Measure Code	Unit Price Excl. Tax					Amount Including Tax	Line																																											
0		0.00	*		0.00		0.00																																												

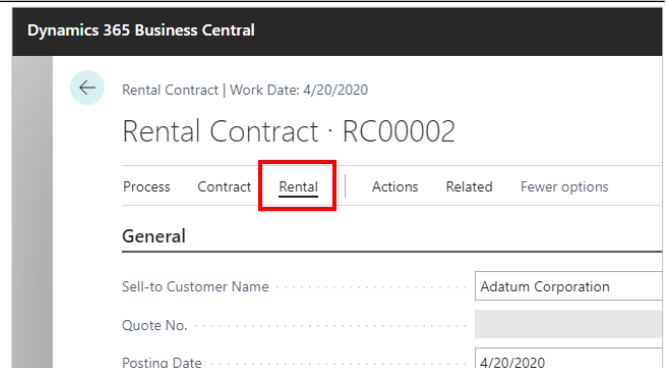
Click on the button **Yes**



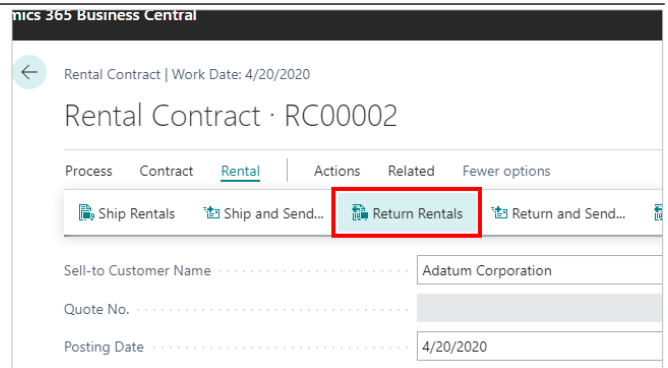
Click on the cell **Qty. to Return** with the value **0**
Enter 1.

Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa...
150.00		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>

Click on the navigation menu item popup **Rental**

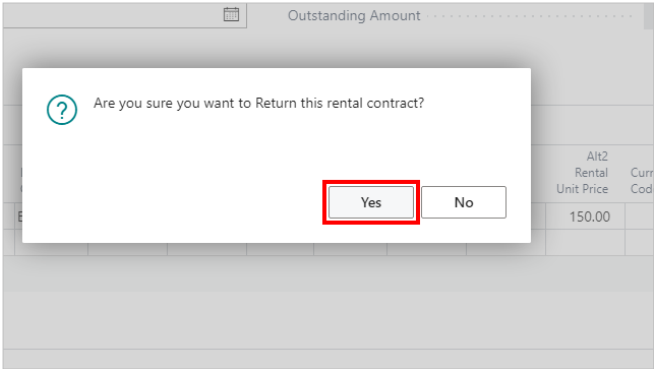


Click on the navigation menu item **Return Rentals**

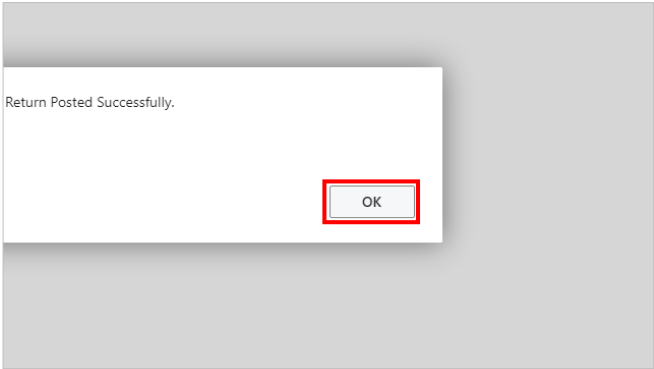




Click on the button **Yes**

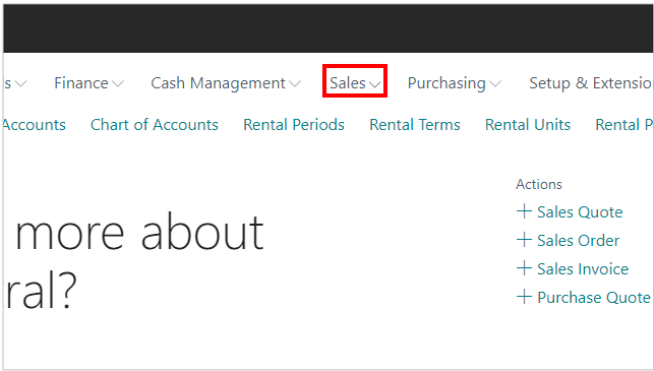


Click on the button **OK**

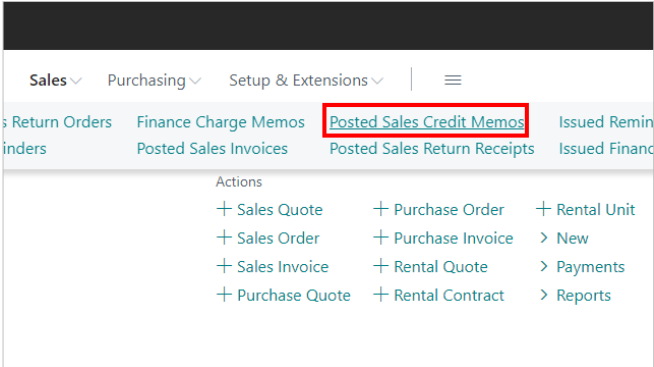


The following demonstrates the review of the Posted Sales Credit Memo created and posted by the Auto Credit Memo feature.

Click on the navigation menu item popup **Sales**



Click on the navigation menu item **Posted Sales Credit Memos**





Click on the link in cell **No.** with the value **PS-CR104003**

Customers

Item Charges

Sales Orders

Sales Inv

Items

Sales Quotes

Blanket Sales Orders

Sales Cre

Posted Sales Credit Memos:

All

Search

Delete

No.		Sell-to Customer No.	Customer Name
PS-CR104001	:	10000	Adatum Corporation
PS-CR104003	:	10000	Adatum Corporation
PS-CR104002	:	10000	Adatum Corporation

Click on the cell **Unit Price Excl. Tax** with the value **50.00**

Note that the Unit Price Excl. Tax is 50.00, which matches the expected results.

Quantity	Unit of Measure Code	Unit Cost (\$)	Unit Price Excl. Tax	Tax Area Code	Tax Group Code
1		0.00	50.00	ATLANTA, GA	SUPPLIES
0.00	Total Tax (USD)				
50.00	Total Incl. Tax (USD)				

The following picture displays the Rental Value Entries containing the entry for the Posted Sales Credit Memo created and posted by the early return.

View - Rental Value Entries												
Search	Process	Rental	Open in Excel	Actions	Related	Fewer options						
Posting Date ↑	Entry Type ↑	Rental Doc. No. ↑	No.	Serial No.	Invoice No.	Invoice Line No.	Cr. Memo No.	Cr. Memo Line No.	Quantity	Unit Price	Amount	Amount Including Tax
3/31/2020	Rental	RC00004	RU00030-001		RU00005	10000		0	1	500.00	500.00	525.00
4/20/2020	Rental	RC00004	RU00030-001			0	PS-CR104003	10000	1	-50.00	-50.00	-51.00

3.24.3.3. Processing Early Returns with 1 Credit Memo per Return

3.24.3.3.1. Overview

The following example demonstrates the Auto Credit Memo feature when the Auto Credit Memo and the 1 Credit Memo/Return fields are enabled on Rental Management Setup. And the Auto Post Auto Credit is not enabled.

Rental Contract Information:

The following provides the details of the rental lines on the contract:

- Rental Unit, PG-001, with a Rental Quantity of 3, a Rental Term of MONTH-PSTART and a Rental Unit Price of 500.00 per month. The rental duration is April 20 to June 19. On April 20 an invoice was posted for the first rental period of April 20 to May 19.
- Rental Unit, RU00026, with a Rental Quantity of 3, a Rental Term of MONTH-PSTART and a Rental Unit Price of 5.00 per month. The rental duration is April 22 to June 21. On April 22 an invoice was posted for the first rental period of April 22 to May 21.
- Rental Group RU00008 with a Rental Quantity of 1, a Rental Term of MONTH-PSTART and a Rental Unit Price of 150.00 per month. The rental duration is April 24 to June 23. The rental unit selected for the group is RU00008-003. On April 24 an invoice was posted for the first rental period of April 24 to May 23.

In addition, the Return Day Billable field is checked on the Rental Lines of the contract.

On April 30, a quantity of 1 for PG-001, a quantity of 2 for RU00026, and the child unit of the group will be returned early generating a single Credit Memo, which will contain the credit amounts for all 3 invoices.

As Return Day Billable is flagged on the Rental Line, the day of the early return, April 30, is not included in the number of days to be credited.

Expected Results:

The expected amounts to be on the Sales Credit Memo Lines are:

- PG-001: The credit will be 19 days for May 1-19. The credit amount will be for 19 days divided by 30 (the number of days in April) times the rental unit price, times the rental quantity returned. $19/30 * 500.00 * 1 = 316.67$ before tax.
- RU00026: The credit will be 21 days for May 1-21. The credit amount will be for 21 days divided by 30 (the number of days in April) times the rental unit price, times the rental quantity returned. $21/30 * 5.00 * 2 = 7.00$ before tax.
- RU00008-003: The credit will be 23 days for May 1-23. The credit amount will be for 23 days divided by 30 (the number of days in April) times the rental unit price, times the rental quantity returned. $23/30 * 150.00 * 1 = 115.00$ before tax.

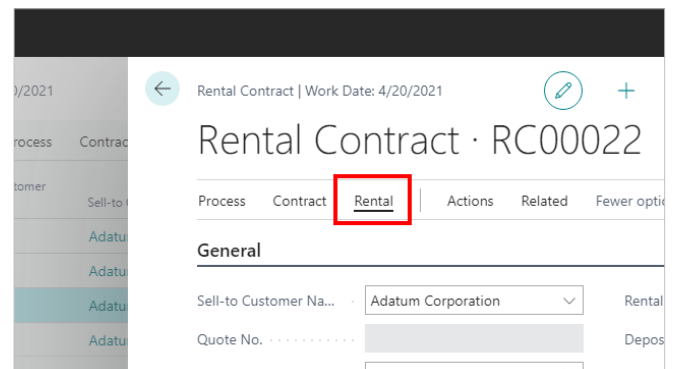
3.24.3.3.1.1.

Enabled.

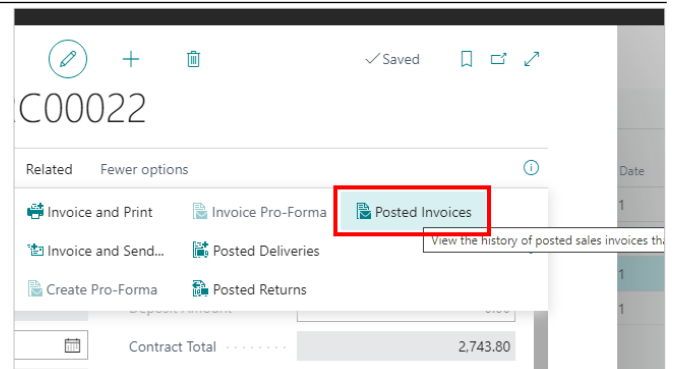
Processing Early Returns when 1 Credit Memo/Return is

The following steps demonstrate the lookup of the posted rental invoices from the contract.

Click on the navigation menu item popup **Rental**

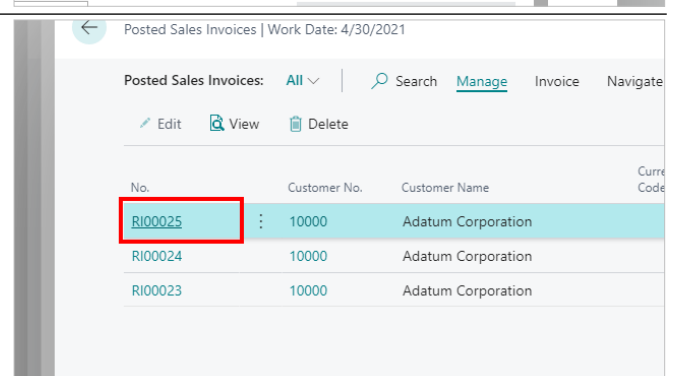


Click on the navigation menu item **Posted Invoices**



Click on the cell **No.** with the value **RI00025**

Note that there are 3 invoices. Number RI00023, RI00024 and RI00025. These are the individual invoices posted on the contract.



No.	Customer No.	Customer Name	Current Code
RI00025	10000	Adatum Corporation	
RI00024	10000	Adatum Corporation	
RI00023	10000	Adatum Corporation	



Click on the cell **Rental Contract No.** with the value **RC00022**

Note that all 3 invoices belong to the Rental Contract on which the returns on each unit will be processed.

Related Fewer options					
Remaining Amount	Location Code	No. Printed	Rental Contract No.	Closed	Canceled
153.00		0	RC00022	No	
15.30		0	RC00022	No	
1,530.00		0	RC00022	No	

The following steps demonstrate the early partial returns and the group child unit return.

Click on the field **Posting Date**

Process	Contract	Rental	Actions	Related	Fewer options
General					
Sell-to Customer Na...	Adatum Corporation			Rental Terr...	
Quote No.				Deposit Ar...	
Posting Date	4/24/2021			Contract T...	
Order Date	4/20/2021			Outstandin...	
Document Date	4/24/2021			Advanced	
External Document No. .					

Click on the link **Open the date picker for Posting Date**

Process	Contract	Rental	Actions	Related	Fewer options
General					
to Customer Na...	Adatum Corporation			Rental Terms Code	
e No.				Deposit Amount	
ng Date	4/24/2021			Contract Total	
r Date	4/20/2021			Outstanding Amount	
ment Date	4/24/2021			Advanced Proforma	<input type="checkbox"/>
nal Document No. .					

Click on a date in the calendar

Select the date the Rental Units are being returned early on. In this example April 30 is selected.

osting Date	4/24/2021			Contract Total				
Order Date				Outstanding Amount				
ocument Date				Advanced Proforma	<input type="checkbox"/>			
external Document No. .								
Rental Lines								
Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	R...
→ PG-001	0.00	0.00		SUPPLIES	0	3	0	
RU00026	0.00	0.00		SUPPLIES	0	3	0	
RU00026	0.00	0.00		SUPPLIES	0	3	0	



Click on **Rental Unit No. = PG-001**, **Rental Terms Code = MONTH-START**, **Rental Quantity = 3**

External Document No.

Rental Lines	Manage	Line	Function
Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	
PG-001	0.00	0.00	
RU00026	0.00	0.00	
RU00008	0.00	0.00	
→ RU00008-003	0.00	0.00	

Click on the cell **Qty. to Return** with the value **0**

Functions Related Fewer options

Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00		SUPPLIES	0	3	0	0	
0.00		SUPPLIES	0	3	0	0	
0.00		SUPPLIES	0	0	0	0	
0.00		SUPPLIES	0	1	0	0	

Enter the text **1**. Press the **TAB** key.

Functions Related Fewer options

Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00		SUPPLIES	0	3	1	0	
0.00		SUPPLIES	0	3	0	0	
0.00		SUPPLIES	0	0	0	0	
0.00		SUPPLIES	0	1	0	0	

Click on the button **Yes**

4/30/2021 Advanced Proforma

Qty. to Return is less than Qty. on Rent. Are you sure you want to process a partial return? Partial return date will be set to the posting date and can be changed on the line.

Yes No

Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00	0.00	SUPPLIES	0	3	0	0	
0.00	0.00	SUPPLIES	0	0	0	0	
0.00	0.00	SUPPLIES	0	1	0	0	



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Functions Related Fewer options							
Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00		SUPPLIES	0	3	1	0	/30/2021
0.00		SUPPLIES	0	3	0	0	
0.00		SUPPLIES	0	0	0	0	
0.00		SUPPLIES	0	1	0	0	

Enter the text **2**. Press the **TAB** key.

Functions Related Fewer options							
Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00		SUPPLIES	0	3	1	0	4/30/2021
0.00		SUPPLIES	0	3		0	
0.00		SUPPLIES	0	0	0	0	
0.00		SUPPLIES	0	1	0	0	

Click on **Rental Unit No. = RU00008-003**, **Rental Terms Code = MONTH-PSTART**, **Rental Quantity = 1**

Rental Lines				Manage	Line	Function
Rental Unit No.	Rental Start Date	No. of Perio...	R			
PG-001	4/20/2021		6/			
→ RU00026	4/22/2021		6/			
RU00008	4/24/2021		6/			
RU00008-003	4/24/2021		6/			

Sales Lines >

Click on the cell **Rental Return Date** with the value **6/23/2021**

Rental Lines							Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price					
PG-001	4/20/2021		6/19/2021	500.00	0.00	0.00					
RU00026	4/22/2021		6/21/2021	5.00	0.00	0.00					
RU00008	4/24/2021		6/23/2021	150.00	0.00	0.00					
→ RU00008-003	4/24/2021		6/23/2021	150.00	0.00	0.00					

Sales Lines >



ODT Rentals Online Help

Click on the link in cell **Rental Return Date** with the value **6/23/2021**

Rental Lines | Manage | Line | Functions | Related | Fewer options						
Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
PG-001	4/20/2021		6/19/2021	500.00	0.00	0.00
RU00026	4/22/2021		6/21/2021	5.00	0.00	0.00
RU00008	4/24/2021		6/23/2021	150.00	0.00	0.00
→ RU00008-003	4/24/2021		6/23/2021	150.00	0.00	0.00

[Sales Lines >](#)

Click on the link **Previous**

Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
PG-001	4/20/2021		6/19/2021	500.00	0.00	0.00
RU00026	4/22/2021		6/21/2021	5.00	0.00	0.00
RU00008	4/24/2021		6/23/2021	150.00	0.00	0.00
→ RU00008-003	4/24/2021		6/23/2021	150.00	0.00	0.00

[Sales Lines >](#)

[Shipping >](#)

Click on the link **Previous**

Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
PG-001	4/20/2021		6/19/2021	500.00	0.00	0.00
RU00026	4/22/2021		6/21/2021	5.00	0.00	0.00
RU00008	4/24/2021		6/23/2021	150.00	0.00	0.00
→ RU00008-003	4/24/2021		6/23/2021	150.00	0.00	0.00

[Sales Lines >](#)

[Shipping >](#)

Click on a date in the calendar

4/24/2021	6/23/2021	150.00	0.00	0.00	SUPPLIES
4/24/2021	6/23/2021	150.00	0.00	0.00	SUPPLIES

[Go to today](#) [Done](#)



Click on the button **Yes**

4/30/2021 Advanced Proforma

There are invoiced rental amounts later than 04/30/21. Are you sure you want to set the return date to 04/30/21?

Yes No

							Rental Return Date
							6/19/2021
3	CENTRAL	C-001				4/22/2021	6/21/2021
1	EAST					4/24/2021	6/23/2021
1	EAST					4/24/2021	6/23/2021

Click on the cell **Qty. to Return** with the value **0**

Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned
0.00		SUPPLIES	0	3	1	0
0.00		SUPPLIES	0	3	2	0
0.00		SUPPLIES	0	0	0	0
0.00		SUPPLIES	0	1	0	0

Enter the text **1**. Press the **TAB** key.

Alt2 Rental Unit Price	Curr... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Partial Return Date
0.00		SUPPLIES	0	3	1	0	4/30/2021
0.00		SUPPLIES	0	3	2	0	4/30/2021
0.00		SUPPLIES	0	0	0	0	
0.00		SUPPLIES	0	1	1	0	

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/20/2021

Rental Contract · RC00022

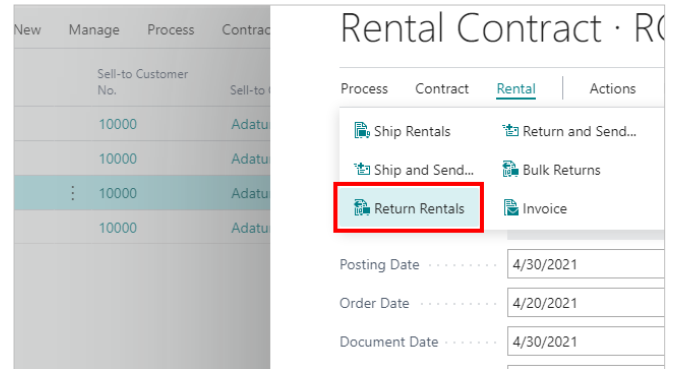
Process Contract **Rental** Actions Related Fewer options

General

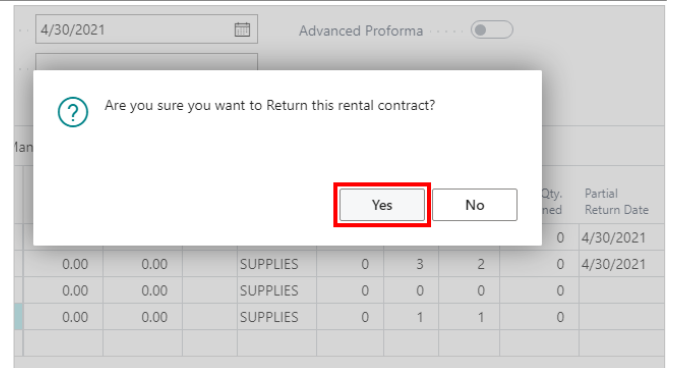
Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

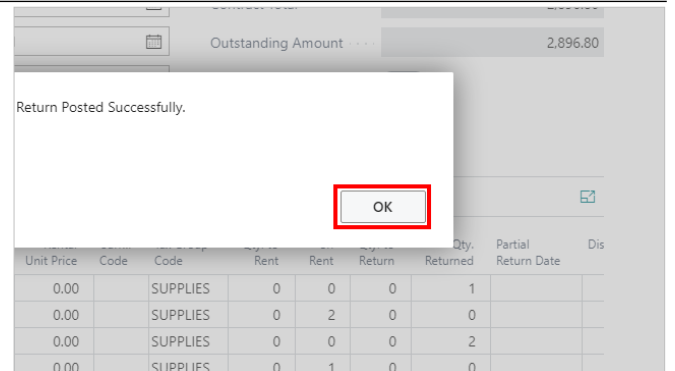
Click on the navigation menu item **Return Rentals**



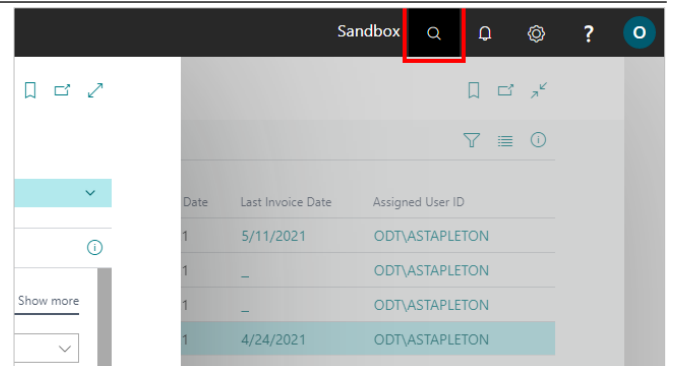
Click on the button **Yes**



Click on the button **OK**



Click on the link **Search**





Click on the field **Tell me what you want to do**

Enter the text **Sales Credit**.

Click on **Sales Credit Memos Lists** ☐

Click on the link in cell **No.** with the value **S-CR1004**



Click on the cell **Description** with the value **Invoice No. RI00023:**

Note that the credit memo lines contain lines for all 3 invoices posted on which early returns were processed.

Also note that the Unit Price Excl. Tax matches the expected results for each unit that the early returns were processed for.

ge Functions Line Fewer options							
No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Co	
40100	Income, Services	EAST	1		316.67	ATLANTA	
	Invoice No. RI00024:						
40100	Income, Services	CENTRAL	1		7.00	ATLANTA	
	Invoice No. RI00025:						
40100	Income, Services	EAST	1		115.00	ATLANTA	

4. Additional Rental Processes

4.1. Metered Usage

4.1.1. Metered Usage Overview

4.1.1.1. Overview

Some rental organizations need to track usage of equipment, some for maintenance purposes and others for both maintenance and billing purposes. Billing for metered usage may require single or multi-level, which means customers may get a specified usage allowance at each level, which charge different usage unit rates depending on the level of the usage.

ODT Rentals Metered Usage contains the following features:

- Single and multi-level pricing with allowance limits. Pricing can include both rental and metered usage prices or contain only metered usage pricing. The metered usage prices and metered usage tax group code can be overridden on the rental lines.
- Multi-level can have three possible prices with 2 allowance limits. For example, level 1 could be 40 hours per week with or without a usage price, level 2 could be 41-80 hours with a price per hour, and level 3 for all hours over 80 hours with a different price from level 2. Metered usage does not have to be hours and can be mileage or some other factor.
- The Allowance accumulation includes accounting for partial period allowances for Optimized and Prorated Rental Terms.

Metered Usage prices can be setup on rental units, groups, and rental packages.

To learn about Metered Usage pricing on Rental Packages, see ODT Rental Online Help, Additional Rental Processes, Rental Packages.

- User defined Rental Unit of Measures for specifying how usage is measured.
- Metered Usage Entries, which contain adjustment type entries and metered usage type entries, and can be viewed from the rental unit card, and the rental quote and contract rental lines.
- Track metered usage for maintenance purposes.
- Bill and track usage through metered usage entries from rental contracts.
- Ability to adjust the meter reading from the rental unit card when the unit is not out on rent.
- Ability to adjust the meter reading from a rental quote and contract, prior to shipment and after return.
- Ability to bill a customer based on a Billable Metered Usage Qty., which can be different than the Metered Usage Qty. The Metered Usage Qty. is used for maintenance tracking purposes.

- Define the labels to print on rental documents.
- The Corrective Rental Credit Memo includes crediting the metered usage and opening the Metered Usage Entries related to the invoice, to enable modification and re-invoicing.
- Metered usage revenue will be displayed on the Rental Unit Statistics.

4.1.2. How to Set Up Metered Usage

4.1.2.1. Overview

In order to process rentals with Metered Usage for billing or for maintenance tracking, there are a number of setups to be completed, which are mandatory.

- Defining the labeling for how Metered Usage Levels are to print on rental documents on Rental Management Setup.
- Specify the G/L Account where Metered Usage revenue is to post to on General Posting Setup.
- Define the Unit of Measures that will be used in tracking usage.
- Configure the Rental Units, groups and Rental Packages that are to have metered usage tracking.
- Setup Rental Price cards on rental unit groups, rental units and rental packages. The setup of price cards is mandatory for metered usage, when billing customers for metered usage. The metered usage prices can be overridden on the rental lines.
- Using Personalize, add metered usage fields to the Rental Contract, Rental Lines and Rental Quote, Rental Lines, if quotes are used.

4.1.3. How to Set Up Document Labelling for Metered Usage

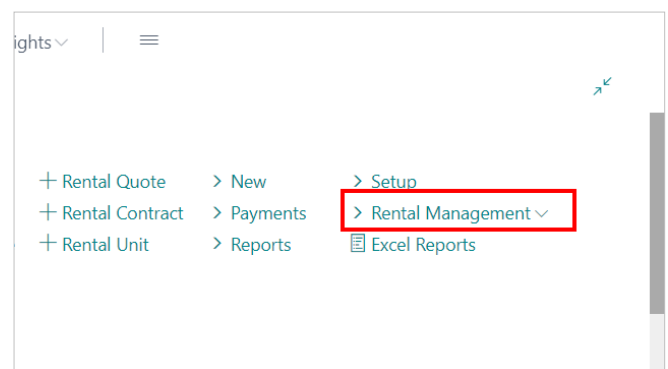
4.1.3.1. Overview

On Rental Management Setup, on the Documents tab, an organization has the option to specify whether Metered Usage prices are to print on rental documents, and define the labels for the printing of the metered usage billing for each usage level.

4.1.3.2. How to Setup Metered Usage Labelling

The following demonstrates how to setup the preferred labelling to print on rental documents.

Click on the navigation menu item popup **Rental Management**





Click on the navigation menu item **Rental Management Setup**

The screenshot shows a navigation menu with the following items: Rental Quote, Rental Contract, Rental Unit, New, Payments, Reports, Setup, Rental Management, Rental Management Setup (highlighted with a red box), Rental Invoicing Worksheet, Group Availability Matrix, and Sub Rental Worksheet. A tooltip for 'Rental Management Setup' is visible, stating 'View or edit settings for Rental Management.'

Click on the toggle field **Print Metered Usage Prices**

The screenshot shows the 'Documents' section of the application. It includes fields for 'Rental Invoice Nos.' (set to RENT-INV) and 'Rental Delivery Nos.' (set to RENT-DEL). Below these, the 'Print Metered Usage' toggle is highlighted with a red box and is currently turned off. The 'Metered Usage 1 Label' is set to 'Level 1'.

Examples of label names are provided for the metered usage levels, which can be overwritten.

Click on the field **Metered Usage 1 Label**

The screenshot shows the 'Documents' section. The 'Print Metered Usage' toggle is now turned on. The 'Metered Usage 1 Label' field is highlighted with a red box and contains the text 'Level 1'.

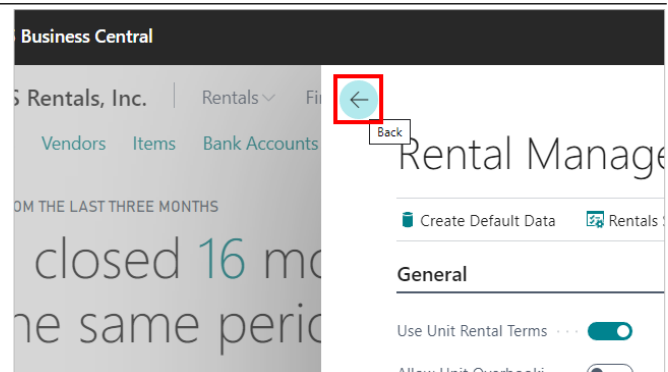
Click on the field **Metered Usage 2 Label**

The screenshot shows the 'Documents' section. The 'Metered Usage 2 Label' field is highlighted with a red box and contains the text 'Level 2'. The 'Metered Usage 3 Label' field contains the text 'Level 3'.

Click on the field **Metered Usage 3 Label**



Click on the back button



4.1.4. How to Set Up General Posting Setup for Metered Usage

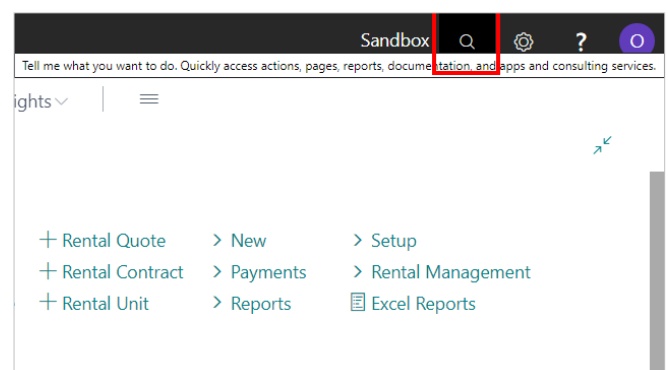
4.1.4.1. Overview

When an organization uses the Metered Usage feature, then on the General Posting Setup, a G/L Account must be entered in the Metered Usage Account field on all applicable records to specify where metered usage revenue is to be posted to.

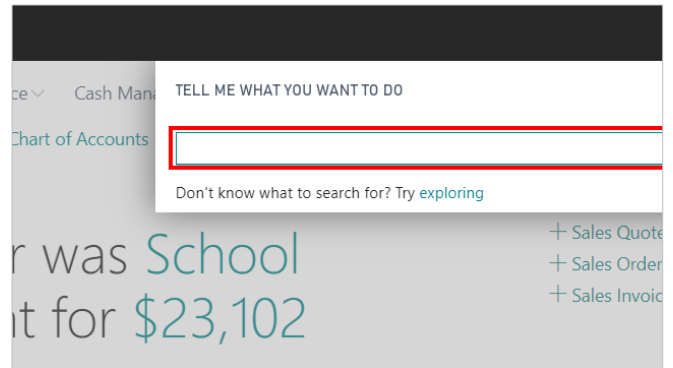
4.1.4.2. How to Update General Posting Setup with Metered Usage Revenue Account

The following demonstrates the adding of the G/L Account for Metered Usage revenue to a General Posting Setup record.

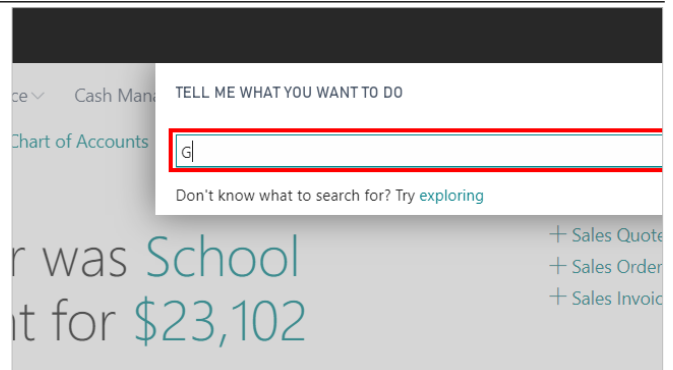
Click on the link



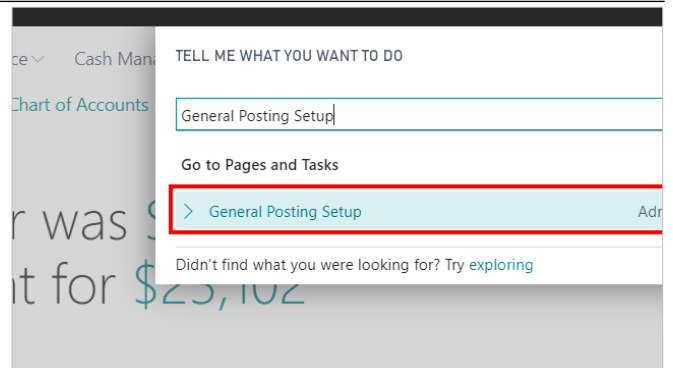
Click on the field **Type** to start search:



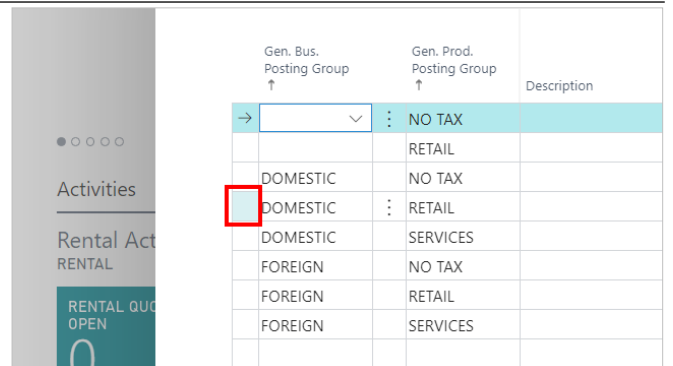
Enter the text **General Posting Setup**.



Click on **General Posting Setup Administration** ☐



Click on **Gen. Bus. Posting Group = DOMESTIC, Gen. Prod. Posting Group = RETAIL, View All Accounts on Lookup = 0**



Gen. Bus. Posting Group	Gen. Prod. Posting Group	Description
→	NO TAX	
DOMESTIC	RETAIL	
DOMESTIC	NO TAX	
DOMESTIC	RETAIL	
DOMESTIC	SERVICES	
FOREIGN	NO TAX	
FOREIGN	RETAIL	
FOREIGN	SERVICES	

Using the scroll bar at the bottom of the page, scroll to the right until the column **Metered Usage Account** is displayed.



created.

A New Meter Reading can be entered, when the unit has been entered on a contract, however, has not been shipped, or has been returned and the contract is still open.

From the Rental Unit card, on the Rental menu option, the sub-menu option of Usage Tracking Entries is available, which displays a listing of the usage tracking transactions. The transactions include adjustments and metered usage transaction.

Adjustments can be generated from either the unit card or the Rental Contract, Rental Line. Adjustment type entries are for recording the initial meter reading and for making adjustments to the Current Meter reading.

Metered usage transactions are the transactions which are to be billed, and have been billed to the customer. Metered Usage type transactions can only be generated from a rental contract.

NOTE:

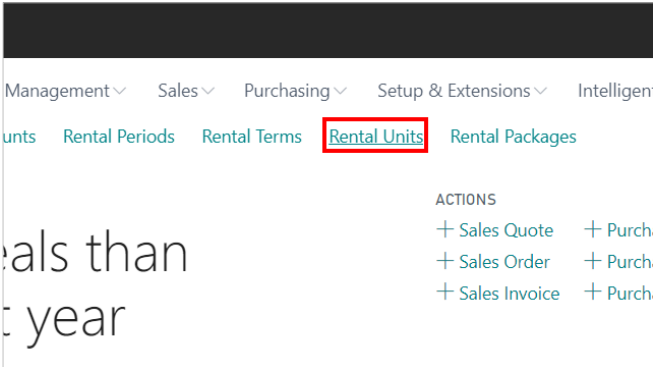
To learn about setting up Rental Packages for Metered Usage, see ODT Rental Online Help, Additional Rental Processes, Rental Packages.

4.1.5.2. How to Set Up a Rental Unit Group for Metered Usage

The following demonstrates the configuring of a Rental Unit group for metered usage.

In this example, the group and child units were previously setup.

Click on the navigation menu item **Rental Units**



Click on the link in cell **No.** with the value **RU00022**

RU00020-001	Breaker for Mini Excavator	
RU00020-002	Breaker for Mini Excavator	
RU00020-003	Breaker for Mini Excavator	
RU00021	Vibrator Plate Group for Mini Excav...	
RU00021-001	Vibrator Plate for Mini Excavator	
RU00021-002	Vibrator Plate for Mini Excavator	
RU00021-003	Vibrator Plate for Mini Excavator	
RU00022	Wacker Skid Steer Group	
RU00022-001	Wacker Skid Steer	
RU00022-002	Wacker Skid Steer	



ODT Rentals Online Help

Click on the toggle field Metered Usage Enabled

For metered usage tracking and billing, it is mandatory that this field be enabled.

Click on the button **Yes**

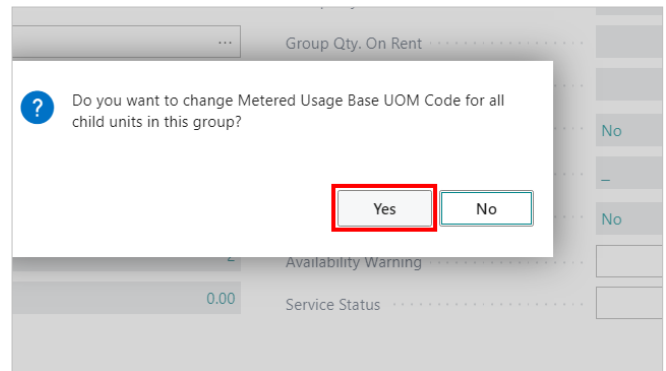
When units have been assigned to a group, then the confirmation message pops up.
When yes is selected, then all units assigned to the group will be updated with the same base UOM for metered usage.
When no is selected, then the child units will require this field to be setup manually.

Click on the field **Metered Usage Base UOM Code**

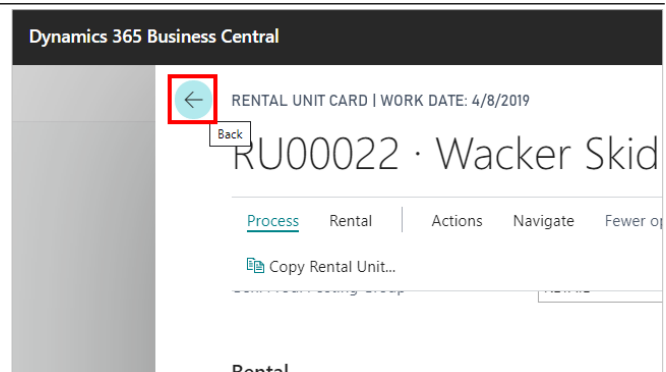
Click on the link in cell **Code** with the value **HOURL**

Select a Unit of Measure option or add a new one to specify how the metered usage is to be tracked.

Click on the button **Yes**



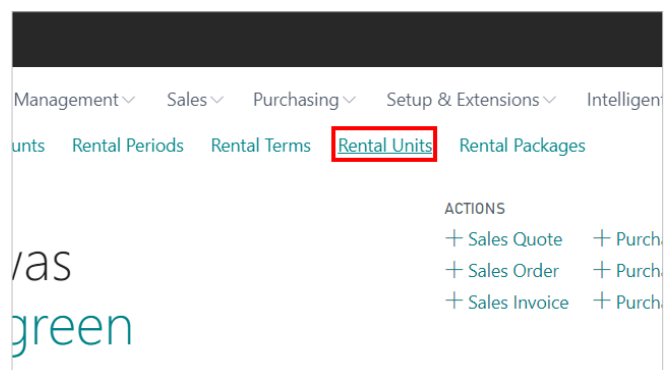
Click on the back button



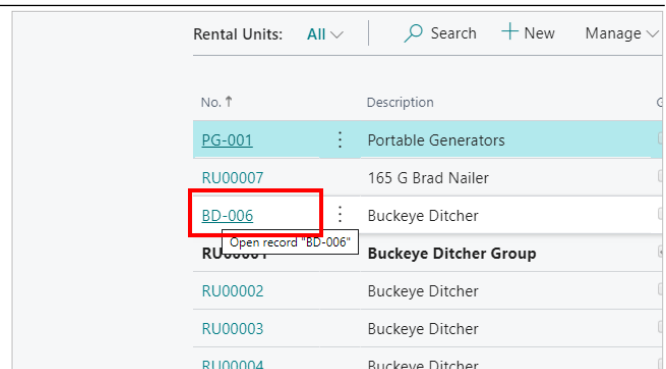
4.1.5.3. How to Set Up a Rental Unit for Metered Usage

The following demonstrates the configuring of a single Rental Unit, not assigned to a rental unit group, for metered usage.

Click on the navigation menu item **Rental Units**



Click on the link in cell **No.** with the value **BD-006**





ODT Rentals Online Help

Click on the toggle field Metered Usage Enabled

For metered usage tracking and billing, it is mandatory that this field be enabled.

Click on the lookup button **Metered Usage Base UOM Code**

Click on the link in cell **Code** with the value **HOURL**

Select or add the factor on how the metered usage is to be tracked.

4.1.5.4. How to Adjust the Current Meter Reading on the Rental Unit

The following steps demonstrate how to record the initial meter reading, if greater than zero.

The same steps apply to entering a new meter reading in order to adjust the current meter reading, when the unit is not out on rent.

Click on the field **New Meter Reading**

ODT Rentals Online Help

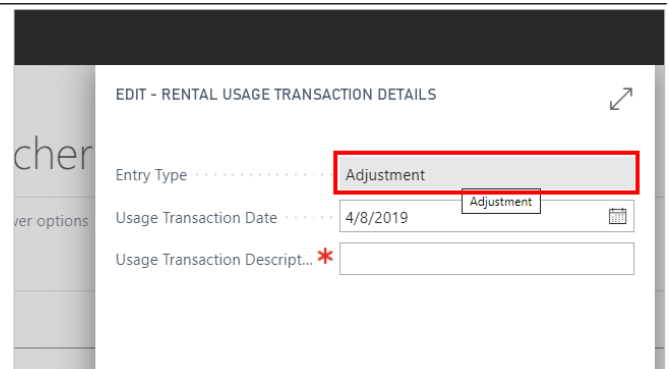
Enter the text **6500**. Press the **Enter** key.



A screenshot of a web form. At the bottom, there is a dropdown menu with the value 'FA000140'. Above it, there is a text input field containing '0.00'. This input field is highlighted with a red rectangular border.

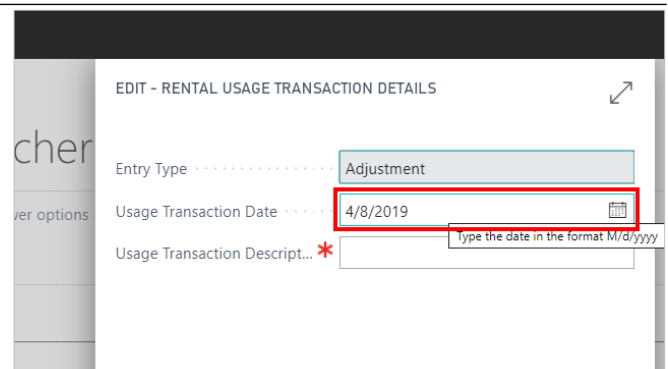
Click on the field **Entry Type**

When any entry is made in the New Meter Reading field on a unit card, the entry will be assigned the type of Adjustment.



A screenshot of a form titled 'EDIT - RENTAL USAGE TRANSACTION DETAILS'. The 'Entry Type' field is set to 'Adjustment' and is highlighted with a red rectangular border. Below it, the 'Usage Transaction Date' is '4/8/2019' and the 'Usage Transaction Description' is empty. A red asterisk is next to the description field.

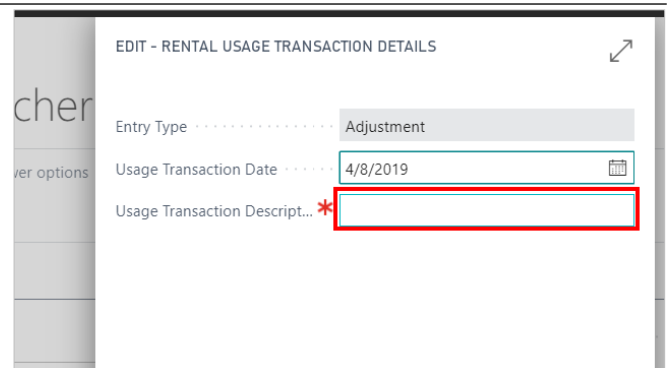
Click on the field **Usage Transaction Date**



A screenshot of a form titled 'EDIT - RENTAL USAGE TRANSACTION DETAILS'. The 'Usage Transaction Date' field is set to '4/8/2019' and is highlighted with a red rectangular border. A tooltip message 'Type the date in the format M/d/yyyy' is visible next to the date field. The 'Entry Type' is 'Adjustment' and the 'Usage Transaction Description' is empty with a red asterisk.

Click on the field **Usage Transaction Description**

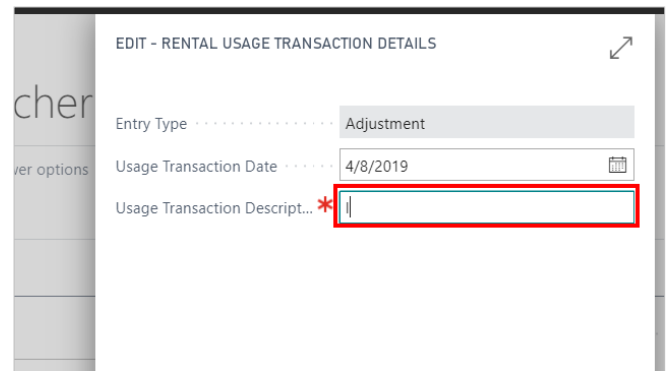
The Usage Transaction Description field is mandatory, on order to ensure the reason for the adjustment is recorded. The description entered is recorded in the Usage Tracking Entries.



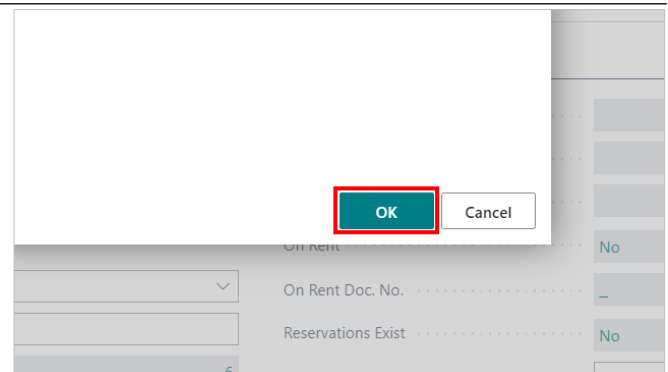
A screenshot of a form titled 'EDIT - RENTAL USAGE TRANSACTION DETAILS'. The 'Usage Transaction Description' field is empty and highlighted with a red rectangular border. A red asterisk is next to the field. The 'Entry Type' is 'Adjustment' and the 'Usage Transaction Date' is '4/8/2019'.

Enter the text **Initial Meter Reading**.

Enter a description as to why the adjustment is being done.



Click on the button **OK**



NOTES

An error message will occur, if a New Meter Reading is entered on the unit card, when the unit is out on rent.

The following is an example of the error message.

"Usage transactions for units out on rental must be generated from the rental contract. Rental Units RU00022-001 is on rent on rental contract RC00004."

When the unit is on a contract and been returned, however, the contract is still open, then following confirmation message will occur.

Rental Unit RU00022-001 has been returned on rental contract RC00004. Billable metered usage can only be entered through the rental contract. Metered usage entered here will be an adjustment. Do you want to continue?

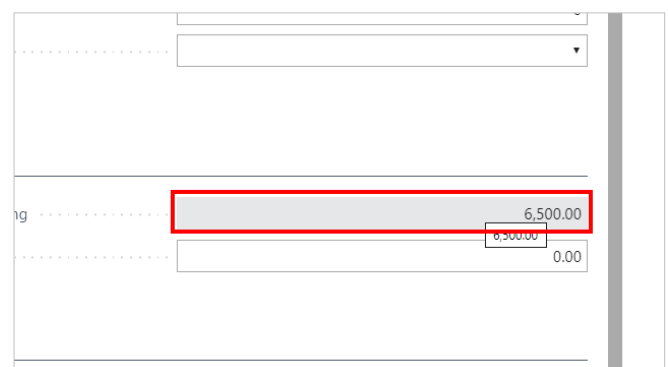
Yes, No

When yes is selected, then the same window will open, that opened when entering the initial reading demonstrated above. The Transaction Date should be confirmed or modified as needed. And the Transaction Description must be populated with the reason for the adjustment.

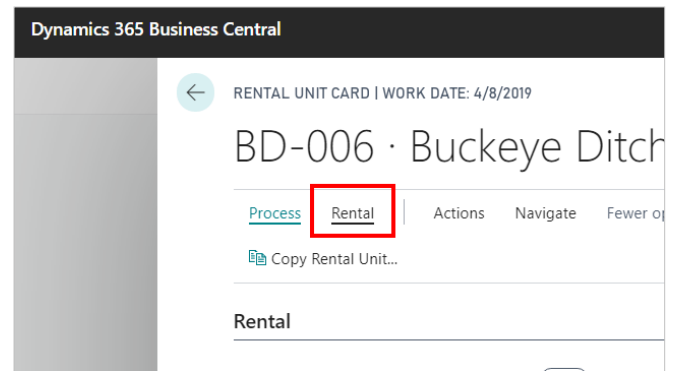
When no is selected, then the reading entered in the New Meter Reading field will be cleared and the Current Meter Reading will not be updated.

Click on the field **Current Meter Reading**

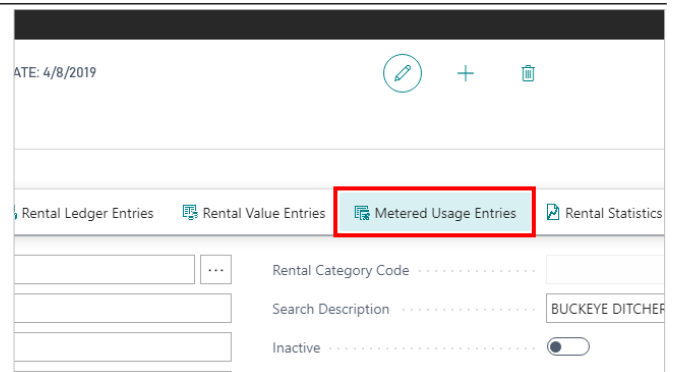
The Current Meter Reading field is automatically updated to reflect the adjustment.



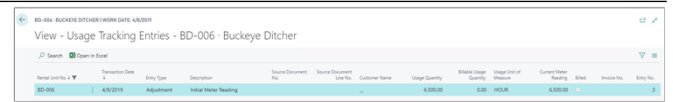
Click on the navigation menu item popup **Rental**



Click on the link **Metered Usage Entries**



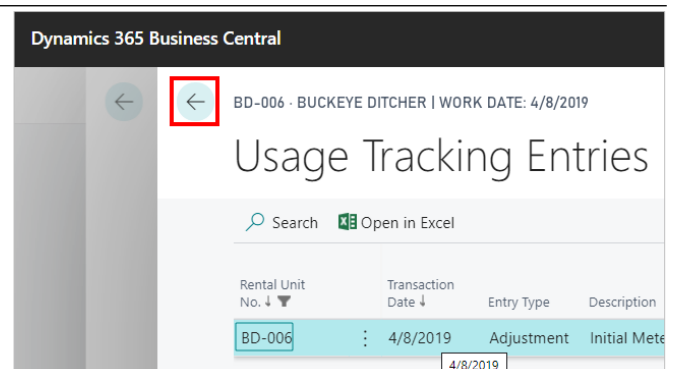
A listing of the Usage Tracking Entries will be displayed.



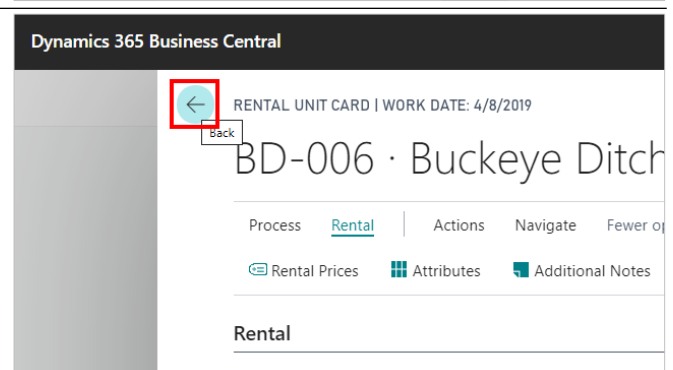
The screenshot shows a table titled 'View - Usage Tracking Entries - BD-006 · Buckeye Ditch'. The table has columns: Rental Unit No., Transaction Date, Entry Type, Description, Rental Document, Rental Document Line No., Customer Name, Usage Quantity, Metered Usage Quantity, Metered Usage Unit of Measure, Current Meter Reading, Meter, Invoice No., and Entry No. The table contains one row with the following data: Rental Unit No. BD-006, Transaction Date 4/8/2019, Entry Type Adjustment, Description Initial Meter Reading, Rental Document, Rental Document Line No., Customer Name, Usage Quantity 6,000.00, Metered Usage Quantity 0.00, Metered Usage Unit of Measure HOUR, Current Meter Reading 6,000.00, Meter, Invoice No., and Entry No. 1.

To learn about the usage tracking entries, see ODT Rental Online Additional Rental Processes, Metered Usage, Processing Contracts with Metered Usage Overview.

Click on the back button



Click on the back button



4.1.6. How to Set Up Rental Prices for Metered Usage

4.1.6.1. Overview

Metered Usage pricing can be used in conjunction with all the Invoicing Types: End, Start, Periodic Start, Periodic End and with Optimize and Prorate.

When tracking metered usage for maintenance purposes only, then the price card is not to be configured.

NOTE:

When a rental term has Prorate or Optimize enabled, and the final rental period is a partial period, the metered usage allowances and pricing are not prorated nor optimized.

Proration and optimization for metered usage will be added in a future release.

Usage tracking allows for the review of all usage incurred on a rental unit or rental package, from the unit and package cards.

Below are examples of how metered usage can be used. All of the examples can be used for maintenance planning, as they all depend on the current meter reading or metered usage quantity being entered during a rental contract and/or on the return of the rental units.

1. Unlimited level, no metered usage price

This example represents companies who need to track usage for maintenance purposes only.

2. Unlimited level, with a metered usage price

In this example, every unit of the metered usage is to be billed to the customer.

3. Two levels, where the first level allowance has no metered usage price, and the second level has a metered usage price. The term does not have prorate or optimize enabled.

Hours for the period being billed are non-billable up to the specified limit, i.e. 40 hours per week for a weekly rental term. Everything over the forty hours would be billed at the specified rate, i.e. \$5 per hour. Note that if the limit for level 1 is 40 hours, level 2 only starts at anything over 40 hours, not at 40 hours.

4. Two levels, both levels have metered usage prices and the term does not have prorate or optimize enabled. Similar to point 3, except that level one might be billed at \$5 per hour and everything over the 40 hours could be billed at \$10 per hour.

5. Three levels, and the term does not have prorate or optimize enabled.

Similar to points 3 and 4, but there is another level added. The first tier could be 1-40 hours, the second 41-80, and the third 81+ for a week. Each of the levels can have its' own rate, with the first rate being zero or greater.

Allowing Zero Usage when invoicing:

When the pricing includes both rental and metered usage pricing, invoicing for the rental charge may need to be posted, without the entry of a Current Meter Reading or Metered Usage for a rental period.

To facilitate this, a field called Allow Zero Usage can be checked, which will allow the posting of the invoice without metered usage being entered for the rental period being invoiced.

The Allow Zero Usage field is automatically cleared once the invoice is posted. Therefore, the field must be checked each time an invoice is being posted, without metered usage being entered.

If the Allow Zero Usage field is not checked, and meter usage has not been entered, and the Invoice menu option is selected, then the posting of the invoice is not allowed.

The following is an example of the error message that will occur.

Rental Unit No. RU10000-001 has Metered Usage Required enabled but no usage entered. Either enter usage or check Allow Zero Usage.



NOTE:

When the Metered Usage pricing is configured on rental price cards with Rental Terms that have the Invoicing Type of Start or Periodic Start, the Metered Usage Billing Date on the Rental Amount Lines is at the end of the contract or end of each rental period, as the meter reading or actual usage cannot be known in advance.

NOTE:

When using Rental Packages the billing of metered usage is not allowed.
When the group or unit components have the metered usage configured on the unit card and on their price card, then the metered usage tracking is only for maintenance tracking purposes.

When either the Current Meter Reading or Metered Usage Qty. fields are populated on the rental lines, the resulting transactions will be recorded as adjustments. Metered usage will not be billed to the customer.

On the Rental Price card, the Metered Usage tab setup is mandatory, when tracking usage for billing purposes.

When tracking metered usage for maintenance only, then the Metered Usage tab fields are not to be configured.

Metered Usage	
Metered Usage Billing	<input checked="" type="checkbox"/>
Metered Usage UOM Code	<input type="text"/>
Metered Usage Period Code	<input type="text"/>
Metered Usage Levels	<input type="text" value="Unlimited"/>
Metered Usage Base Price	<input type="text" value="0.00"/>
Metered Usage Level 1 End Qty.	<input type="text" value="0.00"/>
Metered Usage Level 2 Unit Price	<input type="text" value="0.00"/>
Metered Usage Level 2 End Qty.	<input type="text" value="0.00"/>
Metered Usage Level 3 Unit Price	<input type="text" value="0.00"/>
Metered Usage Allow Line Disc.	<input checked="" type="checkbox"/>
Metered Usage Tax Group Code	<input type="text"/>

The following provides an overview of the metered usage related fields on the rental price card.

- **Metered Usage Billing:**
A toggle field, which must be enabled, to indicate that billing of Meter Usage is required.

The following fields are for the configuration of the pricing schemas for metered usage billing, when the Metered Usage Billing field is enabled.

- **Metered Usage UOM Code:**
The UOM (Unit of Measure) Code defaults from the setup on the rental unit card. This field is mandatory.
- **Metered Usage Period Code:**
Specifies the Period Code that will be applied to the Metered Usage. Normally this set to the same Period Code that is on the Rental Term card selected on the General tab.
- **Metered Usage Levels:**
Specified the number of metered Usage Levels including Unlimited (1 level), 2 levels. 3 levels.
- **Metered Usage Base Price:**
Specifies the price that will be billed for quantities from 0 to the Metered Usage Level 1 End Qty. This price can be set to 0.00, when there is a set allowance for the rental where billing for Metered Usage only occurs, if greater than the allowance.
- **Metered Usage Level 1 End Qty.:**
Specifies the quantity at which the first level allowance ends.
- **Metered Usage Level 2 Unit Price:**
Specifies the price per UOM that will be billed to the customer for usage that falls within the second level range.
- **Metered Usage Level 2 End Qty.:**
Specifies the quantity at which the second level allowance ends.



- **Metered Usage Level 3 Unit Price:**
Specifies the price per UOM that will be billed to the customer for usage that exceeds the Metered Usage Level 2 End Qty.
- **Metered Usage Allow Line Disc.:**
Specifies whether Line Discounts are to be allowed for Metered Usage or not.
- **Metered Usage Tax Group Code:**
Specifies the Tax Group Code that should be applied to Metered Usage charges. This field is mandatory.

NOTE:
Should the organization want Damage Waivers to include the metered usage charges, the Damage Waiver type must be set to Percent, the Damage Waiver Pct. field populated and the field, Damage Waiver Pct. Incl. Usage enabled.

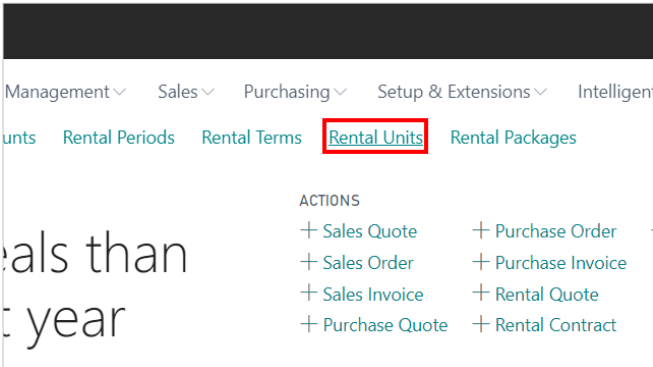
When the Damage Waiver type is Percent, the Damage Waiver Allow Line Disc. field when enabled will not be applied to the damage waiver. This is as the Damage Waiver is calculated from the rental price, which a line discount does apply to.

4.1.6.2. How to Setup a Rental Price Card for a Single Level Metered Usage Price

The following demonstrates the setup of weekly metered usage pricing on a rental unit group.

In this example, there will be no rental price to be billed per period, as all billing will be based on a metered usage price per hour, for all hours of use.

Click on the navigation menu item **Rental Units**



Click on the link in cell **No.** with the value **RU00022**

RU00020-001	Breaker for Mini Excavator
RU00020-002	Breaker for Mini Excavator
RU00020-003	Breaker for Mini Excavator
RU00021	Vibrator Plate Group for Mini Excav...
RU00021-001	Vibrator Plate for Mini Excavator
RU00021-002	Vibrator Plate for Mini Excavator
RU00021-003	Vibrator Plate for Mini Excavator
RU00022	Wacker Skid Steer Group
RU00022-001	Wacker Skid Steer
RU00022-002	Wacker Skid Steer



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00022 · Wacker Skid

Process **Rental** More options

General

No. RU00022

Description Wacker Skid Steer Group

Click on the navigation menu item **Rental Prices**

Dynamics 365 Business Central

← RENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00022 · Wacker Skid

Process Rental More options

Rental Prices Attributes Additional Notes

Setup different rental prices. A rental price is automatically generated when the rental price is entered on the rental line.

No. RU00022

Description Wacker Skid Steer Group

Serial No.

Click on the navigation menu item **New**

Dynamics 365 Business Central

← RU00022 · WACKER SKID STEER GROUP | WORK DATE: 4/8/2019

Rental Price List

Search **+ New** Edit List Delete Edit

Create a new entry.

General

Rental Term Filter

Sales Type Filter

Click on the field **Rental Terms Code**

2

RU00022

Rental Terms Code

All Customers

Price

Opti

Prore

Allov

Tax C



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEEK-PEND**

tar terms Code	
as Type	
as Code	
rency Code	
ting Date	
ing Date	
etered Usage	
etered Usage Billing	

Code	Description
WEEK-END	Weekly Rental for Billin
WEEK-END-OPT	Weekly Rental for Opti
WEEK-END-OPT-TI...	Weekly Rental for Opti
WEEK-PEND	Weekly Rental - Per. Bil
WEEK-START	Weekly Rental - Per. Bil
+ New	

Click on the field **Price**

As in this example, all billing will be based on metered usage pricing, no rental price is entered.

✓ SAVED

	0.00
Never	
Never	

Click on the field **Tax Group Code**

	0.00
Never	
Never	
Look up value	
it1	
it2	

Click on the link in cell **Code** with the value **SUPPLIES**

Select the applicable Tax Group Code.

tal Terms Code Alt1	
tal Terms Code Alt2	
etered Usage Level 2 Unit Price	
etered Usage Level 2 End Qty.	
etered Usage Level 3 Unit Price	
etered Usage Allow Line Disc.	

Code ↑	Description
→ FURNITURE	Taxable Olympic Furni
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supp
+ New	




ODT Rentals Online Help




Click on the toggle field Metered Usage Billing

This field must be enabled in order to bill for metered usage.


Starting Date
Ending Date

Metered Usage
Metered Usage Billing 
Metered Usage UOM Code
Metered Usage Period Code
Metered Usage Levels Unlimited
Metered Usage Base Price

Click on the field **Metered Usage UOM Code**



.....
.....
g 
Code 
d Code  Look up value
s Unlimited
Price 0.00

Click on the link in cell **Code** with the value **HOURL**

ed Usage UOM Code
ed Usage Period Code
ed Usage Levels
ed Usage Base Price
ed Usage Level 1 End Qty.
Usage Waiver
ge Waiver Billing 
ge Waiver Period Code

Code ↑
BOX
CAN
DAY
HOURL
KG Select record "HOURL"
+ New

Click on the field **Metered Usage Period Code**

g 
Code HOURL
d Code 
s Unlimited
Price 0.00
1 End Qty. 0.00



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEEK**

Metered Usage Period Code	
Metered Usage Levels	
Metered Usage Base Price	
Metered Usage Level 1 End Qty.	
Usage Waiver	
Usage Waiver Billing	
Usage Waiver Period Code	

Code ↑	Description
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental

+ New Select record "WEEK"

US Rentals%2C Inc.&bookmark=89%3b%2b1Qs8AJ7%2f0IARAAtADAA...

Click on the field **Metered Usage Levels**

Metered Usage Levels	
Code	HOUR
Code	WEEK
Usage Waiver	Unlimited
Price	0.00
1 End Qty.	0.00

Click on the item **Unlimited** in the list

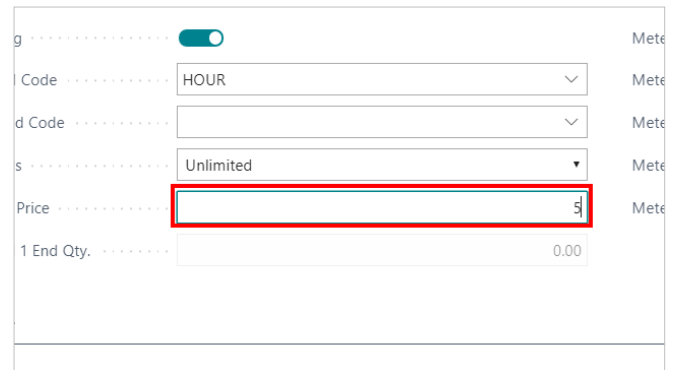
Unlimited is selected as the pricing is based on there being a single price for all usage.

Metered Usage Levels	
Code	HOUR
Code	WEEK
Usage Waiver	Unlimited
Price	0.00
1 End Qty.	0.00

Click on the field **Metered Usage Base Price**

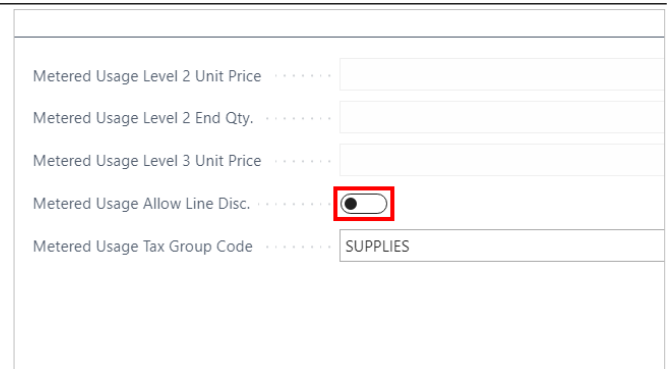
Metered Usage Levels	
Code	HOUR
Code	
Usage Waiver	Unlimited
Price	0.00
1 End Qty.	0.00

Enter the text **50.00**.



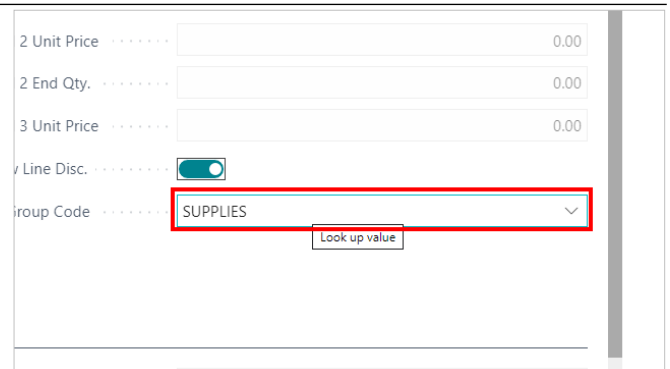
Click on the toggle field Metered Usage Allow Line Disc.

In this example, when on the rental line a Line Discount % is entered the discount will be applied to the metered usage price.

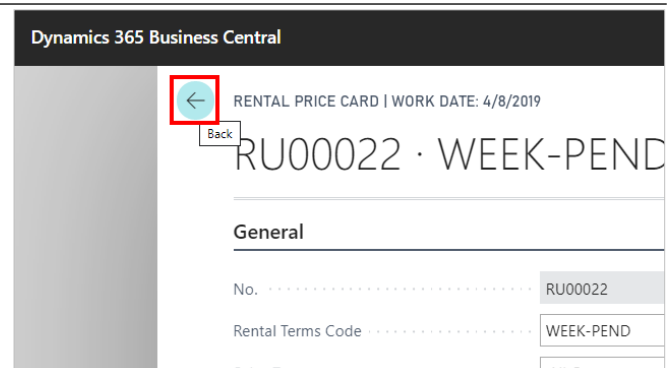


Click on the field **Metered Usage Tax Group Code**

The Tax Group Code defaults from the code entered on the General tab and can be modified to have a different Tax Group Code, if required.



Click on the back button



4.1.6.3. How to Setup a Rental Price Card for Billing on Based on 2 Levels of Metered Usage

The following demonstrates the setup of a periodic end monthly price card on the same rental unit group, for 2 levels of metered usage pricing.

In this example, there will be no rental price to be billed each period, as all billing will be based on a metered usage pricing based on hours of use.

For the first 160 hours of use, the price of \$50.00 per hour will be used and for any hours of usage over 160 the price of \$100.00 per hour will be used.



Click on the navigation menu item **Rental Prices**

RENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00022 · Wacker Skid

Process Rental Actions Navigate Fewer options

Rental Prices Attributes Additional Notes

General

No. RU00022

Description Wacker Skid Steer

Click on the navigation menu item **New**

Dynamics 365 Business Central

RU00022 · WACKER SKID STEER GROUP | WORK DATE: 4/8/2019

Rental Price List

Search **+ New** Edit List Delete Edit

Create a new entry.

General

Rental Term Filter

Sales Type Filter None

Click on the field **Rental Terms Code**

2

RU00022

Rental Terms Code

All Customers Look up value

Price

Opti

Pror

Allov

Tax C

Click on the link in cell **Code** with the value **MONTH-PEND**

Rental Terms Code

Code Description

MONTH-END-PROR... Monthly Rental for Pro

MONTH-END-TIME Monthly Rental for Billi

MONTH-PEND Monthly Rental - Per. B

MONTH-P... Monthly Rental - Early

MONTH-PSTART Monthly Rental - Per. B

+ New



Entered Usage



ODT Rentals Online Help

Click on the field **Price**

As in this example, all billing will be based on metered usage pricing, no rental price is entered.

NOT SAVED  

	<input type="text" value="0.00"/>
Never	
Never	
<input checked="" type="checkbox"/>	

Click on the field **Tax Group Code**

	<input type="text" value="0.00"/>
Never	
Never	
<input checked="" type="checkbox"/>	
	<input type="text" value="Look up value"/>
t1	
t2	

Click on the link in cell **Code** with the value **SUPPLIES**

Select the applicable Tax Group Code.

tal Terms Code Alt1	Code ↑	Description
tal Terms Code Alt2	→ FURNITURE	Taxable Olympic Furni
	LABOR	Labor on Job
	MATERIALS	Taxable Raw Materials
	NONTAXABLE	Nontaxable
	SUPPLIES	Taxable Olympic Supp
tered Usage Level 2 Unit Price	+ New	Select record "SUPPLIES"
tered Usage Level 2 End Qty.		
tered Usage Level 3 Unit Price		
tered Usage Allow Line Disc.	<input checked="" type="checkbox"/>	

Click on the toggle field Metered Usage Billing

Starting Date	<input type="text"/>
Ending Date	<input type="text"/>
Metered Usage	
Metered Usage Billing	<input checked="" type="checkbox"/>
Metered Usage UOM Code	<input type="text"/>
Metered Usage Period Code	<input type="text"/>
Metered Usage Levels	Unlimited
Metered Usage Base Price	<input type="text"/>



ODT Rentals Online Help

Click on the field **Metered Usage UOM Code**

This field must be enabled in order to bill for metered usage.

Form showing fields for Metered Usage UOM Code, Metered Usage Period Code, Metered Usage Levels, Metered Usage Base Price, Metered Usage Level 1 End Qty., Metered Usage Waiver, Metered Usage Waiver Billing, and Metered Usage Waiver Period Code. The **Metered Usage UOM Code** field is highlighted with a red box.

Click on the link in cell **Code** with the value **HOURL**

Form showing the dropdown menu for the **Metered Usage UOM Code** field. The dropdown is open, showing options: Code ↑, BOX, CAN, DAY, HOURL, KG, and Select record "HOURL". The **HOURL** option is highlighted with a red box.

Click on the field **Metered Usage Period Code**

Form showing fields for Metered Usage UOM Code, Metered Usage Period Code, Metered Usage Levels, Metered Usage Base Price, Metered Usage Level 1 End Qty., Metered Usage Waiver, Metered Usage Waiver Billing, and Metered Usage Waiver Period Code. The **Metered Usage Period Code** field is highlighted with a red box.

Click on the link in cell **Code** with the value **MONTH**

Form showing the dropdown menu for the **Metered Usage Period Code** field. The dropdown is open, showing options: Code ↑, Description, 2HR, 4HR, 8HR, DAY, MONTH, and Select record "MONTH". The **MONTH** option is highlighted with a red box.



ODT Rentals Online Help

Click on the field **Metered Usage Levels**

g	<input checked="" type="checkbox"/>		Mete
Code	HOUR		Mete
d Code	MONTH		Mete
s	Unlimited		Mete
Price		0.00	Mete
1 End Qty.		0.00	

Click on the item **2 Levels** in the list

g	<input checked="" type="checkbox"/>		Mete
Code	HOUR		Mete
d Code	MONTH		Mete
s	Unlimited		Mete
Price	Unlimited		Mete
1 End Qty.	3 2 Levels		

Click on the field **Metered Usage Base Price**

g	<input checked="" type="checkbox"/>		Mete
Code	HOUR		Mete
d Code	MONTH		Mete
s	2 Levels		Mete
Price			Mete
1 End Qty.		0.00	

Enter the text **50.00**.

g	<input checked="" type="checkbox"/>		Mete
Code	HOUR		Mete
d Code	MONTH		Mete
s	2 Levels		Mete
Price	50.00		Mete
1 End Qty.		0.00	



ODT Rentals Online Help

Click on the field **Metered Usage Level 1 End Qty.**

Code	HOURL	▼	Mete
d Code	MONTH	▼	Mete
s	2 Levels	▼	Mete
Price		50.00	Mete
1 End Qty.		0.00	
<hr/>			
g	<input type="checkbox"/>		Dam

Enter the text **160**.

Code	HOURL	▼	Mete
d Code	MONTH	▼	Mete
s	2 Levels	▼	Mete
Price		50.00	Mete
1 End Qty.		1	
<hr/>			
g	<input type="checkbox"/>		Dam

Click on the field **Metered Usage Level 2 Unit Price**

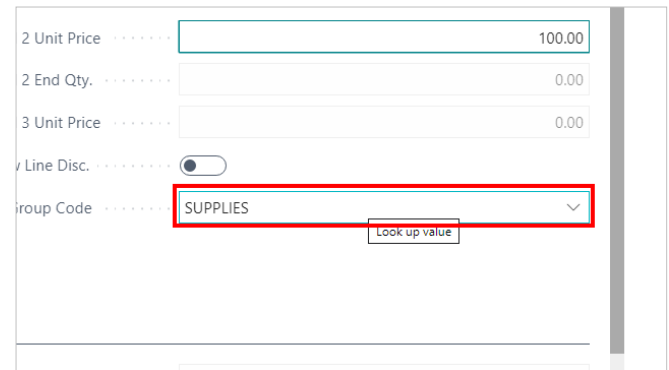
it1			
it2			
<hr/>			
2 Unit Price		0.00	
2 End Qty.		0.00	
3 Unit Price		0.00	
v Line Disc.	<input type="checkbox"/>		

Enter the text **100.00**.

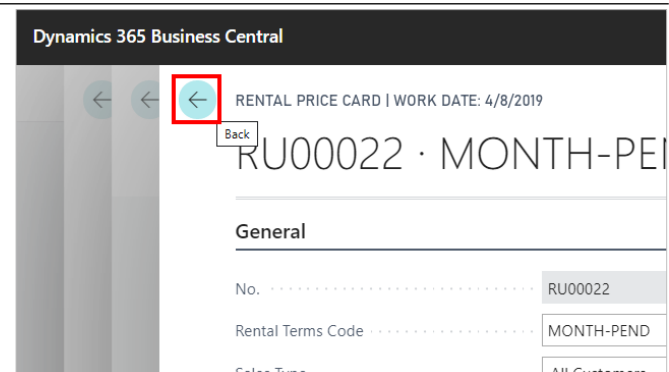
it1			
it2			
<hr/>			
2 Unit Price			
2 End Qty.		0.00	
3 Unit Price		0.00	
v Line Disc.	<input type="checkbox"/>		

Click on the field **Metered Usage Tax Group Code**

The Tax Group Code defaults from the code entered on the General tab and can be modified to have a different Tax Group Code, if required.



Click on the back button

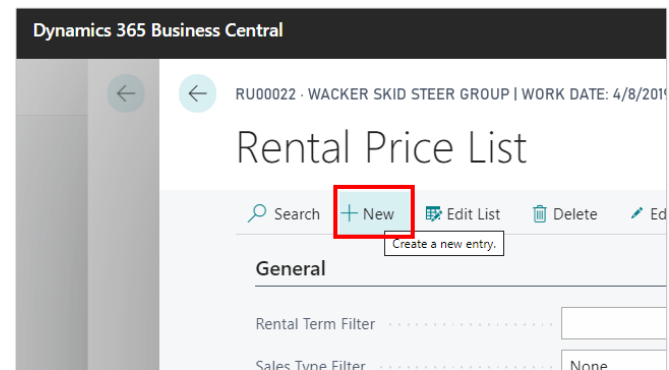


4.1.6.4. How to Setup a Rental Price with a Rental Charge and 2 Levels of Metered Usage

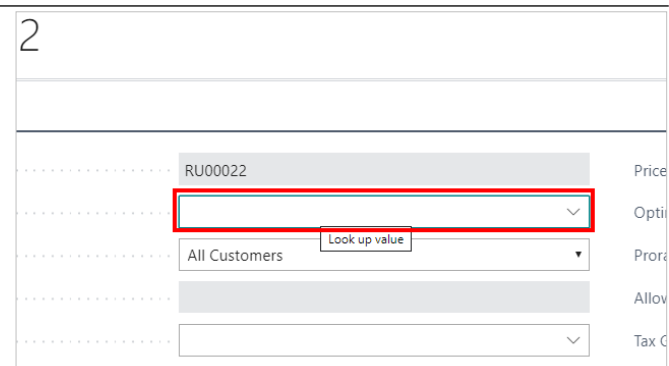
The following demonstrates the setup of a periodic end monthly price card on the same rental unit group, for 2 levels of metered usage pricing and a monthly rental price.

In this example, there will be a monthly rental price to be billed at the start of each month the unit is out on rent. The first level of usage will have an allowance of 160 hours per month with a zero price and the second level will have a price of \$100.00 per hour, which will be billed for any use over 160 hours at the end of each month.

Click on the navigation menu item **New**



Click on the field **Rental Terms Code**





ODT Rentals Online Help

Click on the link in cell **Code** with the value **MONTH-
PSTART**

Type	Code	Description
Code	MONTH-END-PROR...	Monthly Rental for Pro
Agency Code	MONTH-END-TIME	Monthly Rental for Billi
Starting Date	MONTH-PEND	Monthly Rental - Per. B
Ending Date	MONTH-PEND EARLY	Monthly Rental - Early
	MONTH-PSTART	Monthly Rental - Per. B
+ New		Select record "MONTH-PSTART"

Registered Usage

Registered Usage Billing ☐

Click on the field **Price**

NOT SAVED

	0.00
Never	
Never	
<input checked="" type="checkbox"/>	

Enter the text **8000.00**.

✓ SAVED

Never	
Never	
<input checked="" type="checkbox"/>	

Click on the field **Tax Group Code**

	8000.00
Never	
Never	
<input checked="" type="checkbox"/>	
Look up value	
t1	
t2	



ODT Rentals Online Help

Click on the link in cell **Code** with the value
SUPPLIES

Select the applicable Tax Group Code.

tal Terms Code Alt1	Code ↑	Description
tal Terms Code Alt2	→ FURNITURE	Taxable Olympic Furni
	LABOR	Labor on Job
	MATERIALS	Taxable Raw Materials
	NONTAXABLE	Nontaxable
ered Usage Level 2 Unit Price	SUPPLIES	Taxable Olympic Supp
ered Usage Level 2 End Qty.	+ New	Select record "SUPPLIES"
ered Usage Level 3 Unit Price		
ered Usage Allow Line Disc.	<input type="checkbox"/>	

Click on the toggle field Metered Usage Billing

This field must be enabled in order to bill for metered
usage.

Starting Date	
Ending Date	
Metered Usage	
Metered Usage Billing	<input checked="" type="checkbox"/>
Metered Usage UOM Code	
Metered Usage Period Code	
Metered Usage Levels	Unlimited
Metered Usage Base Price	

Click on the field **Metered Usage UOM Code**

.....		Calendar icon	Rent
g	<input checked="" type="checkbox"/>		Mete
Code		Look up value	Mete
d Code			Mete
s	Unlimited		Mete
Price		0.00	Mete

Click on the link in cell **Code** with the value **HOURL**

ed Usage UOM Code	
ed Usage Period Code	
ed Usage Levels	Code ↑
ed Usage Base Price	BOX
ed Usage Level 1 End Qty.	CAN
	DAY
	HOURL
	KG Select record "HOURL"
age Waiver	+ New
ge Waiver Billing	<input type="checkbox"/>
ge Waiver Period Code	

Click on the field **Metered Usage Period Code**

g	<input checked="" type="checkbox"/>	
Code	HOUR	▼
d Code		▼
s	Unlimited	Look up value ▼
Price		0.00
1 End Qty.		0.00


Click on the link in cell **Code** with the value **MONTH**


Entered Usage Period Code													
Entered Usage Levels	<table border="1"> <thead> <tr> <th>Code ↑</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>→ 2HR</td> <td>2 Hours</td> </tr> <tr> <td>4HR</td> <td>4 Hours</td> </tr> <tr> <td>8HR</td> <td>8 Hours</td> </tr> <tr> <td>DAY</td> <td>Daily Rental</td> </tr> <tr> <td>MONTH</td> <td>Monthly Rental</td> </tr> </tbody> </table>	Code ↑	Description	→ 2HR	2 Hours	4HR	4 Hours	8HR	8 Hours	DAY	Daily Rental	MONTH	Monthly Rental
Code ↑	Description												
→ 2HR	2 Hours												
4HR	4 Hours												
8HR	8 Hours												
DAY	Daily Rental												
MONTH	Monthly Rental												
Entered Usage Base Price													
Entered Usage Level 1 End Qty.													
Image Waiver													
Image Waiver Billing	<div> + New Select record "MONTH" </div>												
Image Waiver Period Code													


Click on the field **Metered Usage Levels**


g	<input checked="" type="checkbox"/>		Mete
Code	HOUR	▼	Mete
d Code	MONTH	▼	Mete
s	Unlimited	▼	Mete
Price	<div>Unlimited</div>	0.00	Mete
1 End Qty.		0.00	

Click on the item **2 Levels** in the list

g 

Code HOUR 

d Code MONTH 

s Unlimited 

Price Unlimited

1 End Qty. 3 | 2 Levels



ODT Rentals Online Help

Click on the field **Metered Usage Base Price**

g ☒ Mete

Code HOUR Mete

d Code MONTH Mete

s 2 Levels Mete

Price 0.00 Mete

1 End Qty. 0.00

Click on the field **Metered Usage Level 1 End Qty.**

Code HOUR Mete

d Code MONTH Mete

s 2 Levels Mete

Price 0.00 Mete

1 End Qty. 0.00

g ☐ Dam

Enter the text **160**.

Code HOUR Mete

d Code MONTH Mete

s 2 Levels Mete

Price 0.00 Mete

1 End Qty. 1

g ☐ Dam

Click on the field **Metered Usage Level 2 Unit Price**

it1

it2

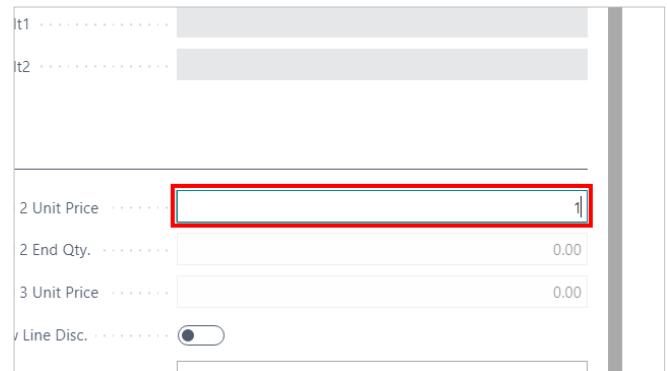
2 Unit Price 0.00

2 End Qty. 0.00

3 Unit Price 0.00

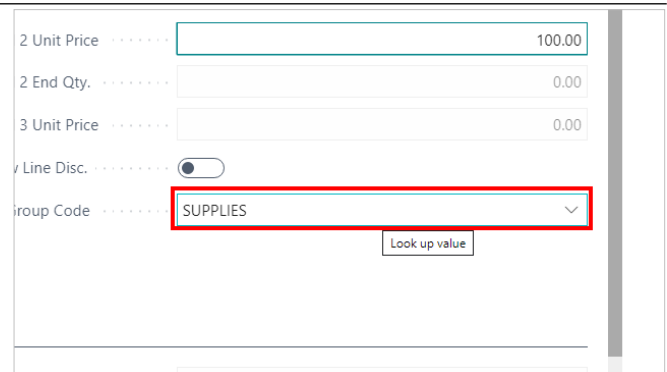
v Line Disc. ☐

Enter the text **100.00**.

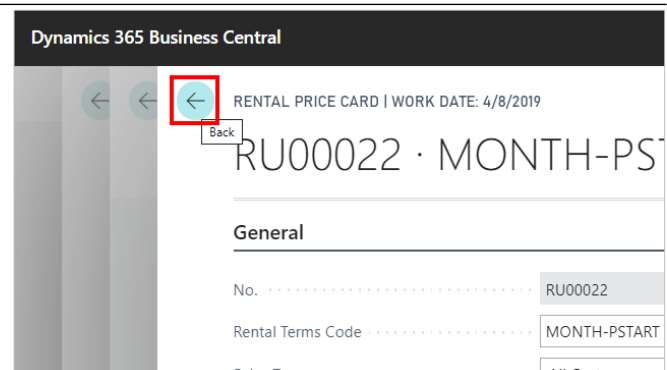


Click on the field **Metered Usage Tax Group Code**

The Tax Group Code defaults from the code entered on the General tab and can be modified to have a different Tax Group Code, if required.



Click on the back button



4.1.6.5. How to Setup a Rental Price with a Rental Charge and 3 Levels of Metered Usage

The following demonstrates the setup of a price card on a rental unit group, where the rental terms used will be a monthly rental with periodic end invoicing and 3 levels of metered usage pricing with 2 allowance levels.

On the monthly price card a rental charge of 1200.00 per month will be setup.

The following configuration will be used for metered usage.

The first level of usage will have an allowance limit of 2000 miles per month with a zero usage price.

The second level will have a allowance limit set at 4000 miles, with a usage price of 1.00 per mile. Thus for any miles of use from 2001 to 4000 miles, the customer will be billed 1.00 per mile.

The third level will have a price of 2.00 per mile, which will used for billing any miles over 4000 in a month.



Click on the navigation menu item **Rental Units**

Management ▾ Sales ▾ Purchasing ▾ Setup & Extensions ▾ Intelligent ▾

units Rental Periods Rental Terms **Rental Units** Rental Packages

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- + Rental Quote
- + Rental Contract

Click on the link in cell **No.** with the value **RU00023**

RU00021-001	Vibrator Plate for Mini Excavator
RU00021-002	Vibrator Plate for Mini Excavator
RU00021-003	Vibrator Plate for Mini Excavator
RU00022	Wacker Skid Steer Group
RU00022-001	Wacker Skid Steer
RU00022-002	Wacker Skid Steer
RU00023	Ford 150 Trucks Group
RU00023-001	Ford 150 Trucks
RU00023-002	Ford 150 Trucks
RU00023-003	Ford 150 Trucks

<https://testrm36531us/BC/?runiframe=1#>

Click on **Metered Usage Required** Metered Usage
Base UOM Code Current Meter Reading 0.00 New
Meter Reading

Group Qty.

Group Quote Qty. 0.00

Usage

Metered Usage Required ☒

Link >

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00023 · Ford 150 Tru

Process **Rental** More options

Posting

Gen. Prod. Posting Group RETAIL



Click on the navigation menu item **Rental Prices**

RENTAL UNIT CARD | WORK DATE: 4/8/2019

RU00023 · Ford 150 Tru

Process Rental More options

Rental Prices Attributes Additional Notes

Posting

Gen. Prod. Posting Group RETAIL

Click on the navigation menu item **New**

RENTAL UNIT CARD RU00023 · FORD 150 TRUCKS GROUP | WORK DATE: 4/8/2019

RU00023 Rental Price List

Process Rental Search **+ New** Edit List Delete

Create a new entry.

General

Rental Term Filter

Sales Type Filter

Click on the field **Rental Terms Code**

Ren RU00023

General

No. RU00023 Price

Rental Terms Code **Look up value** Optim

Sales Type All Customers Prora

Sales Code Allow

Currency Code Tax G

Click on the link in cell **Code** with the value **MONTH-PEND**

Rental Terms Code **MONTH-PEND** Optimize

Code	Description
MONTH-END-OPT-...	Monthly Rental for Opt
MONTH-END-PROR...	Monthly Rental for Pro
MONTH-END-TIME	Monthly Rental for Billi
MONTH-PEND	Monthly Rental - Per. B
MONTH-PEND EARLY	Monthly Rental - Early

+ New

Metered Usage

Metered Usage Billing Metered Us



Click on the field **Price**

NOT SAVED

H-PEND

Price

0.00

Optimize

Never

Prorate

Never

Allow Line Disc.

Enter **Price**.

✓ SAVED

H-PEND

Price

0.00

Optimize

Never

Prorate

Never

Allow Line Disc.

Click on the field **Tax Group Code**

Price

1200.00

Optimize

Never

Prorate

Never

Allow Line Disc.

Tax Group Code

Look up value

Rental Terms Code Alt1

Rental Terms Code Alt2

Click on the link in cell **Code** with the value **SUPPLIES**

Select the applicable Tax Group Code.

Rental Terms Code Alt1

Rental Terms Code Alt2

Metered Usage Level ...

Metered Usage Level ...

Metered Usage Level ...

0.00

Metered Usage Allow ...

Code #

Description

→ FURNITURE

Taxable Olympic Furni

LABOR

Labor on Job

MATERIALS

Taxable Raw Materials

NONTAXABLE

Nontaxable

SUPPLIES

Taxable Olympic Supp

+ New

Select record "SUPPLIES"



Click on the toggle field Metered Usage Billing

This field must be enabled in order to bill for metered usage.

Rental Code: MON

Starting Date: [Calendar Icon] Ending Date: [Calendar Icon]

Metered Usage

Metered Usage Billing: ☒ Metered Usage UOM: [Dropdown] Metered Usage Period: [Dropdown] Metered Usage Levels: Unlimited Metered Usage Base: 0.00

Click on the field Metered Usage UOM Code

Code: MON

Ending Date: [Calendar Icon]

Metered Usage

Metered Usage Billing: ☒ Metered Usage UOM: [Dropdown] Metered Usage Period: [Dropdown] Metered Usage Levels: Unlimited Metered Usage Base: 0.00

Click on the link in cell Code with the value MILES

Metered Usage Billing: ☒ Metered Usage UOM: [Dropdown] Metered Usage Period: [Dropdown] Metered Usage Levels: Unlimited Metered Usage Base: 0.00

Metered Usage Level: [Dropdown] PCS

Damage Waiver: [Dropdown] New

Click on the field Metered Usage Period Code

Metered Usage Billing: ☒ Metered Usage UOM: MILES Metered Usage Period: [Dropdown] Metered Usage Levels: Unlimited Metered Usage Base: 0.00 Metered Usage Level: 0.00



Click on the link in cell **Code** with the value **MONTH**

Metered Usage Perio...	<div>▼</div>	Metered Us
Metered Usage Levels ...		
Metered Usage Base ...		
Metered Usage Level ...		
Damage Waiver >		

Code ↑	Description
→ 2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
Select record "MONTH"	
+ New	

Click on the field **Metered Usage Levels**

Metered Usage	
Metered Usage Billing ...	<div>☑</div>
Metered Usage UOM ...	<div>MILES ▼</div>
Metered Usage Perio...	<div>MONTH ▼</div>
Metered Usage Levels ...	<div>Unlimited ▼</div>
Metered Usage Base ...	<div>0.00</div>
Metered Usage Level ...	<div>0.00</div>
Damage Waiver >	

Click on the item **3 Levels** in the list

Metered Usage	
Metered Usage Billing ...	<div>☑</div>
Metered Usage UOM ...	<div>MILES ▼</div>
Metered Usage Perio...	<div>MONTH ▼</div>
Metered Usage Levels ...	<div>Unlimited ▼</div>
Metered Usage Base ...	<div>0.00</div>
Metered Usage Level ...	<div>0.00</div>
Damage Waiver >	

Unlimited
2 Levels
3 Levels

Click on the field **Metered Usage Base Price**

Metered Usage	
Metered Usage Billing ...	<div>☑</div>
Metered Usage UOM ...	<div>MILES ▼</div>
Metered Usage Perio...	<div>MONTH ▼</div>
Metered Usage Levels ...	<div>3 Levels ▼</div>
Metered Usage Base ...	<div>0.00</div>
Metered Usage Level ...	<div>0.00</div>
Damage Waiver >	



ODT Rentals Online Help

Click on the field **Metered Usage Level 1 End Qty.**

Metered Usage UOM ...	MILES	Mete
Metered Usage Perio...	MONTH	Mete
Metered Usage Levels ...	3 Levels	Mete
Metered Usage Base ...	0.00	Mete
Metered Usage Level ...	0.00	
Damage Waiver >		

Enter **Metered Usage Level 1 End Qty..**

Metered Usage UOM ...	MILES	Mete
Metered Usage Perio...	MONTH	Mete
Metered Usage Levels ...	3 Levels	Mete
Metered Usage Base ...	0.00	Mete
Metered Usage Level ...	0.00	
Damage Waiver >		

Click on the field **Metered Usage Level 2 Unit Price**

	Rental Terms Code Alt1	
	Rental Terms Code Alt2	
	Metered Usage Level ...	0.00
▼	Metered Usage Level ...	0.00
▼	Metered Usage Level ...	0.00
▼	Metered Usage Allow ...	<input checked="" type="checkbox"/>

Enter **Metered Usage Level 2 Unit Price.**

	Rental Terms Code Alt1	
	Rental Terms Code Alt2	
	Metered Usage Level ...	1
▼	Metered Usage Level ...	0.00
▼	Metered Usage Level ...	0.00
▼	Metered Usage Allow ...	<input checked="" type="checkbox"/>



Click on the field **Metered Usage Level 2 End Qty.**

Rental Terms Code Alt2	
Metered Usage Level ...	1.00
Metered Usage Level ...	1.000
Metered Usage Level ...	0.00
Metered Usage Allow ...	<input type="checkbox"/>
Metered Usage Tax Gr...	SUPPLIES

Enter **Metered Usage Level 2 End Qty..**

Rental Terms Code Alt2	
Metered Usage Level ...	1.00
Metered Usage Level ...	4
Metered Usage Level ...	0.00
Metered Usage Allow ...	<input type="checkbox"/>
Metered Usage Tax Gr...	SUPPLIES

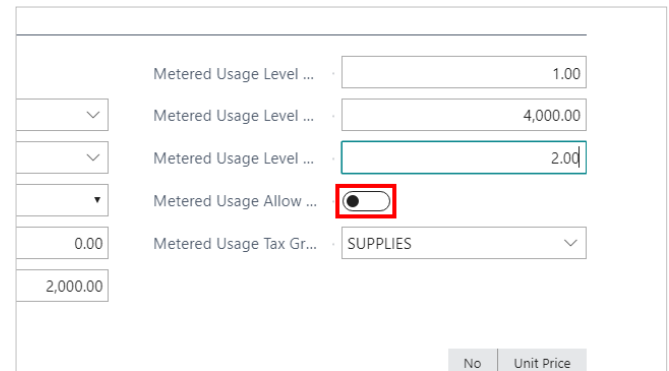
Click on the field **Metered Usage Level 3 Unit Price**

Metered Usage Level ...		1.00
Metered Usage Level ...	4000	
Metered Usage Level ...	0.00	
Metered Usage Allow ...	<input type="checkbox"/>	
Metered Usage Tax Gr...	SUPPLIES	

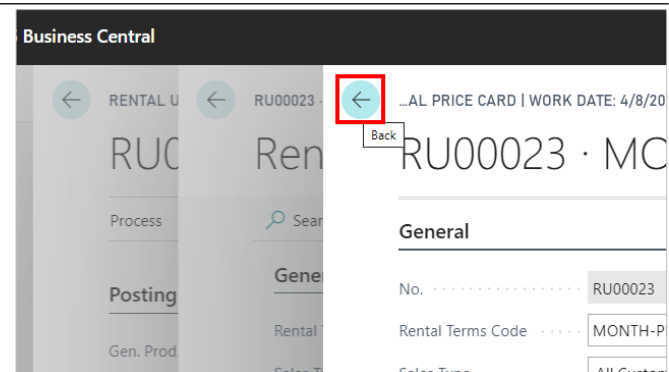
Enter **Metered Usage Level 3 Unit Price.**

Metered Usage Level ...		1.00
Metered Usage Level ...	4,000.00	
Metered Usage Level ...	4	
Metered Usage Allow ...	<input type="checkbox"/>	
Metered Usage Tax Gr...	SUPPLIES	

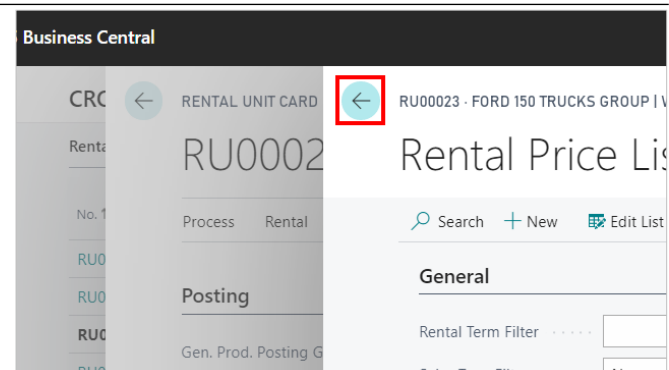
Click on the toggle field Metered Usage Allow Line Disc.



Click on the back button



Click on the back button



4.1.7. Processing Contracts with Metered Usage Overview

4.1.7.1. Overview

With ODT Rentals, a new meter reading or an actual metered usage quantity for a rental unit, can be entered on a Rental Contract at any time, while the contract is still open.

This includes while the unit is out on rent, or has been returned, however, the contract is still open.

When the actual meter reading on the unit is different than the Previous Meter Reading, then it can be adjusted prior to shipping the unit.

By entering a Current Meter Reading prior to shipping the unit, the metered usage request window will open, where the Transaction Date can be accepted or overridden, and the reason for the adjustment entered.

An adjustment type entry will be created in the Usage Tracking Entry table, which is not billable to the customer.

Once the unit has been shipped, and a Current Meter Reading is entered that differs from the Previous Meter Reading, then the difference calculated will be displayed in the Metered Usage Qty. field and Billable Metered Usage Qty. fields. Alternatively a Metered Usage Qty. can be entered, which will default to the Billable Metered Usage Qty. field.

The Billable Metered Usage Qty. field can be modified to be different than the Metered Usage Qty. This allows for billing a different quantity of usage than the Metered Usage Qty., which is used for maintenance tracking



purposes.

A metered usage type entry will be created in the Metered Usage Entries, which will be billable to the customer based on the quantity in the Billable Metered Usage Qty. field. The Posting Date on the contract is used as the Transaction Date in the Usage Tracking Entry.

Subsequently the Rental Amount Lines with a Type of Metered Usage will be created from the Metered Usage Entries.

During a rental period, multiple Current Meter Readings can be entered. Multiple Usage Tracking Entries will be created with the Transaction Date based on the Posting Date on the contract at the time of entry. The Billable Metered Usage Qty. on each entry will be billed on the next invoice, when the date on the entries falls within the rental period.

The Metered Usage Entries in the list provide a listing of usage tracking entries, which are both historical and open entries.

The entries consist of 2 types of entries, Adjustment and Metered Usage.

Adjustment entries are not billed to the customer, whereas metered usage entries are billed or billable to the customer.

Adjustments can be generated from either the rental unit card, or the quote or contract, Rental Line.

From the Rental Unit card, Adjustment type entries can be created by entering a New Meter Reading.

Examples of adjustments could be for recording an initial meter reading, or update the Current Meter reading that is displayed to include usage incurred during maintenance.

Metered Usage are the transactions which are to be billed, or have been billed to the customer. Metered Usage type transactions can only be generated from a rental contract.

The Allow Zero Usage feature, when flagged, allows an invoice to be posted, when metered usage is required, however, for the rental period being invoiced, a Current Meter Reading or Metered Usage Qty. is not available at the time of invoicing.

When metered usage pricing has multiple levels with allowance limits, and if the Current Meter Reading for a rental period is not entered until a subsequent period, or the return of the unit, the allowances are accumulated and applied to the Billable Metered Usage Qty. to be billed.

In order to process rentals using metered usage, additional fields will need to be added to the Rental Lines on the Rental Contract and Rental Quote, if applicable, using Personalize.

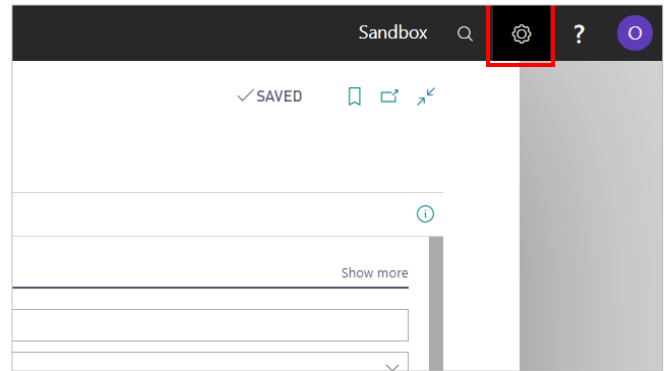
The available fields related to metered usage are covered in the following chapter.

To learn about processing contracts containing Rental Packages with metered usage pricing, see ODT Rental Online Help, Additional Rental Processes, Rental Packages.

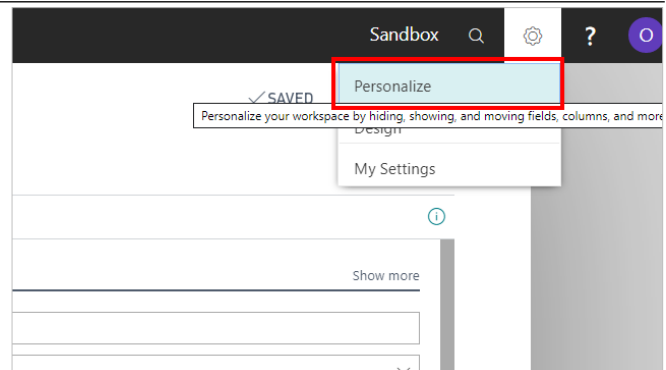
4.1.7.2. How to Add Metered Usage Fields to the Rental Lines

The following demonstrates the adding of the metered usage fields to the Rental Lines.

Click on the link **Settings**

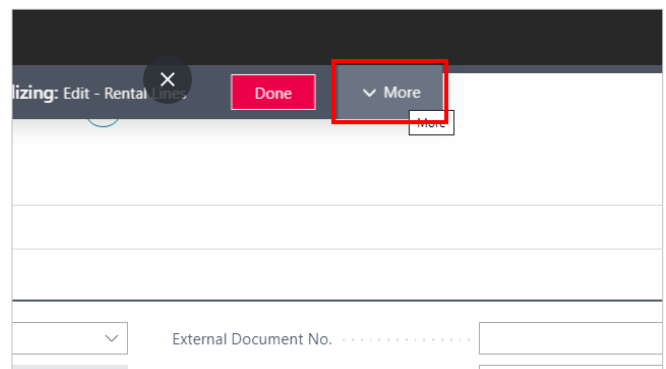


Click on the menu item **Personalize**

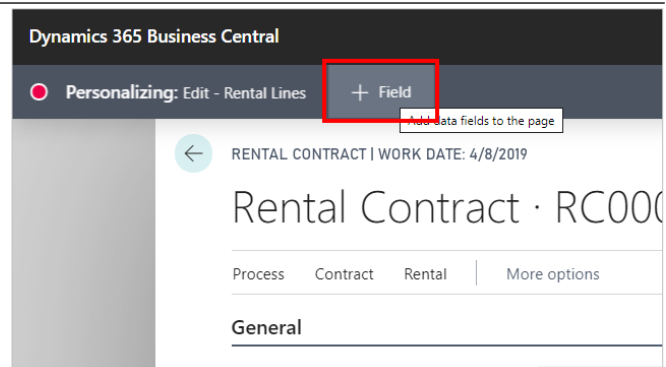


Click on the Rental Lines tab so that the red line outlines the tab.

Click on the link **More**



Click on the link **Field**



To add the fields to the Rental Line, left click on the field and hold, then drag and drop the field to the preferred location on the rental line.

The fields can be resized after it is placed on the line while using Personalize, or they can be resized after closing Personalize.

Click on the data brick **Metered Usage Required**

Specifies that Metered Usage entry is required for the Rental Term selected on the Rental Line. The setting on this field defaults from the Rental Price card and cannot be edited.

31489	Sub Rental Purch. Order No.	Ready
12799	Current Meter Reading	Ready
34047	Allow Zero Usage	Ready
34047	Metered Usage Required	Ready
31489	Usage Unit of Measure	Ready
34047	Cust. Declines Damage Wa...	Ready

Click on the data brick **Usage Unit of Measure**

Displays the Usage UOM for the Rental Line. The Usage Unit of Measure defaults from the Rental Price card for the term on the line. This field is cannot be edited.

12799	Current Meter Reading	Ready
34047	Allow Zero Usage	Ready
34047	Metered Usage Required	Ready
31489	Usage Unit of Measure	Ready
34047	Cust. Declines Damage Wa...	Ready
34047	Customer Pickup	Ready

Click on the data brick **Metered Usage Tax Group**

Specifies the Tax Group Code to be applied to the Metered Usage Unit Prices. The tax group code defaults from the Rental Price card to the Rental Line and can be modified.

Boolean	Shortage	Ready
Code	Periodic Usage Tax Group ...	Ready
Code	Standby Tax Group Code	Ready
Code	Metered Usage Tax Group...	Ready
Decimal	Billable Metered Usage Qty.	Ready
Date	Shipment Date	Ready

Click on the data brick **Previous Meter Reading**

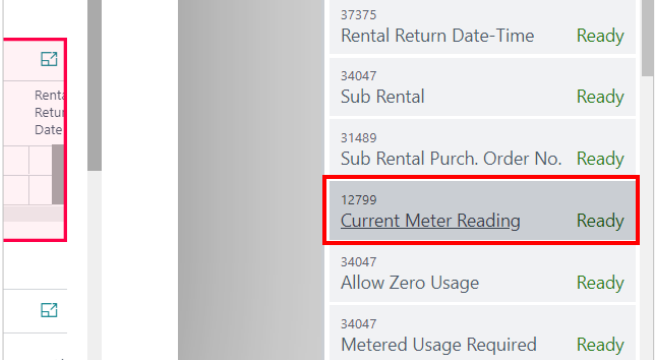
Displays the most current meter reading recorded for the unit. The quantity defaults from the Usage Tracking Entries and cannot be directly edited.

31488	Sub Rental Description	Ready
12799	Package Line Amount Excl...	Ready
37375	Shipment Date Time	Ready
12799	Previous Meter Reading	Ready
11775	Shipment Date	Ready
11775	Rental Billing End Date	Ready



Click on the data brick **Current Meter Reading**

This field is used for recording a new meter reading, which is different from the Previous Meter Reading. The entry of a Current Meter Reading can be used for maintenance tracking, adjustments and billable metered usage.



37375	Rental Return Date-Time	Ready
34047	Sub Rental	Ready
31489	Sub Rental Purch. Order No.	Ready
12799	Current Meter Reading	Ready
34047	Allow Zero Usage	Ready
34047	Metered Usage Required	Ready

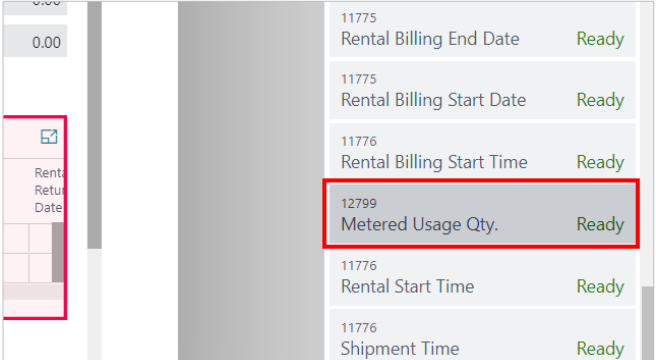
The Current Meter Reading field is used for recording a new meter reading, which is different from the Previous Meter Reading. The entry of a new Current Meter Reading can be used for maintenance tracking, adjustments and billable metered usage.

When a unit is initially entered on a Rental Line, the quantity displayed will be the same as the Previous Current Meter Reading.

When a Current Meter Reading is entered that differs from the Previous Meter Reading, then the difference calculated will be displayed in the Metered Usage Qty. field, which then defaults to the Billable Metered Usage Qty. field. And a Usage Tracking entry will be created. The Posting Date on the contract is used as the Transaction Date in the Usage Tracking Entries, which can be accessed by selecting the Rental Line menu option, Line, then Metered Usage Entries.

Click on the data brick **Metered Usage Qty.**

This field displays the sum of the Metered Usage Entries with a type of Metered Usage. A drill down is provided on this field, which when selected, will display a listing of the Usage Tracking Entries for the unit on the selected rental line.



11775	Rental Billing End Date	Ready
11775	Rental Billing Start Date	Ready
11776	Rental Billing Start Time	Ready
12799	Metered Usage Qty.	Ready
11776	Rental Start Time	Ready
11776	Shipment Time	Ready

This field can be used to enter the actual usage quantity, instead of entering the Current Meter Reading on the rental line.

When a quantity is entered, a Metered Usage Entry is created using the Posting Date on the contract as the Transaction Date in the entry. The Current Meter Reading field will be updated to include the actual usage quantity.

NOTE:

The Metered Usage Qty. field is the sum of the Usage Tracking Entries and is used for maintenance tracking only. If the amount displayed is overridden, then the Billable Metered Usage Qty. will be updated accordingly.

When there are multiple Metered Usage Entries to be invoiced, then the current entry will be adjusted, so that the sum of the entries equals the amount just entered.



Click on the data brick **Billable Metered Usage Qty.**

The quantity defaults from the Metered Usage Qty. field, and can be modified.

The Billable Metered Usage Qty. is used for billing the usage and populates the Rental Amount line records for metered usage.

The screenshot shows a software interface with a list of data bricks on the right. The brick '12799 Billable Metered Usage Qty.' is highlighted with a red border. Other visible bricks include '37375 Shipment Date Time', '31489 Return Bin Code', '34047 Pkg. Line No Print', '11775 Shipment Date', and '11775 Rental Billing End Date'. On the left, there are input fields with '0.00' and a 'Customergro... Code' field.

Click on the data brick **Allow Zero Usage**

The Allow Zero Usage specifies whether a rental line unit can be invoiced without having usage entered. When checked, will allow an invoice to be posted for rental charges, when Metered Usage is required, however, for the rental period being invoiced, a Current Meter Reading or Metered Usage Qty. is not available at the time of invoicing.

The field is cleared once the invoice is posted.

The screenshot shows a software interface with a list of data bricks on the right. The brick '34047 Allow Zero Usage' is highlighted with a red border. Other visible bricks include '37375 Rental Return Date-Time', '34047 Sub Rental', '31489 Sub Rental Purch. Order No.', '34047 Cust. Declines Damage Wa...', and '34047 Customer Pickup'. On the left, there are input fields with '0.00' and a 'Customergro... Code' field.

NOTE:

The Metered Usage Base Price, Metered Usage Level 2 Unit Price and Metered Usage Level 3 Unit Price fields can be added to the Rental Lines. The prices will default from the Rental Price card and can be overridden based on the price card setup.

For example, if the metered usage pricing is setup with 2 levels of metered usage pricing, then only the Metered Usage Base Price and Metered Usage Level 2 Unit Price can be modified.

4.1.8. How to Process Contracts with Metered Usage for Maintenance Only

4.1.8.1. Overview

Some rental organizations need to track usage of equipment based on for maintenance scheduling purposes only. Meaning that they do not bill customers based on metered usage.

For processing rentals for tracking maintenance only, the rental unit must have the Metered Usage Enabled field activated, and the Metered Usage Base UOM Code specified.

The Rental Price card for the group or unit must not have the Metered Usage tab configured as this is used for when billing customers.

At any time during the contract, the Current Meter Reading can be entered on the rental line and can be entered multiple times during a rental period.

When entering a Current Meter Reading multiple times, and the Posting Date on the contract is different each time, then an individual Usage Tracking Entry will be created for each entry.

4.1.8.2. How to Process a Contract with Tracking Metered Usage for Maintenance

The following demonstrates the entry and processing of a 2 month contract with tracking metered usage only for maintenance purposes.

In this example, the rental charge will be invoiced at the end of the first and final rental periods.



The meter reading will be entered at the end of the contract, when the unit is returned.

Click on the navigation menu item **Rental Contract**

ods Rental Terms Rental Units Rental Packages

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit
+ Sales Order	+ Purchase Invoice	> New
+ Sales Invoice	+ Rental Quote	> Payments
+ Purchase Quote	+ Rental Contract	> Reports

Create a new rental contract for rental pro

Click on the field **Sell-to Customer Name**

Contract

Rental More options

me

.....

.....

.....

Click on the link in cell **No.** with the value **10000**

General

ell-to Customer Name

quote No.

osting Date

Order Date

ocument Date

No. ↑	Name
→ 10000	Adatum Corporation
200	Select record "10000" Search
30000	School of Fine Art
40000	Alpine Ski House
50000	Relecloud

Click on the cell **Rental Unit No.**

Document Date 6/1/2019

Rental Lines Manage Line Functions Fewer

Rental Unit No.	Standard Text Code	Description
→ <input type="text"/>		

Sales Lines Manage More options



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Document Date 6/7/2019

Rental Lines	Manage	Line	Functions	Fewer c
Rental Unit No.	Standard Text Code	Description		
→	...			

Sales Lines Manage More options

Click on the link in cell **No.** with the value **BD-006**

Rental Contract

Process	Contract	Rental	No. ↑	Description
General			→ PG-001	Portable Generators
			RP00001	Mini Excavator with Vibrat
			RU00007	165 G Brad Nailer
			BD-006	Buckeye Ditcher
			RU00001	Buckeye Ditcher Group
			RU00002	Buckeye Ditcher
			RU00003	Buckeye Ditcher
			RU00004	Buckeye Ditcher
			RU00005	Buckeye Ditcher

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

6/7/2019 Outstanding

Line	Functions	Fewer options		
Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
	Buckeye Ditcher	MONTH-PEND	1	EAST
			Look up value	

More options

Click on the cell **Rental Return Date** with the value **7/6/2019**

Outstanding Amount 8,

Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
			6/7/2019	7/6/2019	8,000.00	0.00	0.00
					Type the date in the format M/d/yyyy		



Click on the field **Posting Date**

Ensure the Posting Date is set to the date on which the shipping occurring.

The screenshot shows a 'Rental' form with a 'Posting Date' field highlighted by a red box. The date '6/7/2019' is entered in the field. A tooltip is visible over the date field, stating 'type the date in the format MM/dd/yyyy'.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract' screen for contract RC00031. The 'Rental' navigation menu item is highlighted with a red box. The screen displays the 'General' section with fields for 'Sell-to Customer Name' (Adatum Corporation) and 'Quote No.'.

Click on the navigation menu item **Ship Rentals**

The screenshot shows the 'Rental Contract' screen for contract RC000. The 'Ship Rentals' navigation menu item is highlighted with a red box. The screen displays the 'General' section with fields for 'Sell-to Customer Name' (Adatum Corporation), 'Quote No.', and 'Posting Date' (6/7/2019).

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. The background shows the 'Rental Contract' screen with a table of rental units.

ND	1	EAST	6/7/2019	8/6/2019	8,000.00



ODT Rentals Online Help

Click on the button **OK**

ent Posted Successfully.

OK

Rental start date	Rental Return Date	Rental U	Pri
6/7/2019	8/6/2019	8,000.0	

The following demonstrates the invoicing of the rental charge for the first rental period, without entering a Current Meter Reading or Metered Usage Qty. on the rental line.

Click on the field **Posting Date**

Rental | More options

Adatum Corporation

6/7/2019

6/7/2019

6/7/2019

Click on the link **Open the date picker**

Adatum Corporation

19

19

19

Click on the link **Next**

Adatum Corporation

6/7/2019

June 2019

Next

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29



ODT Rentals Online Help

Click on a date in the calendar

Select the date on which the first invoice is to be billed to the customer.

The Billing Date, which is the earliest date the invoice can be posted can be located on the Rental Amount Lines, by selecting Line, then Rental Amount Lines.

The following demonstrates what will occur when the metered usage is not entered prior to invoicing the rental period and what steps to take to be able to invoice without entering the usage.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Invoice**

Click on the button **Yes**



ODT Rentals Online Help

Click on the button **OK**

Contract Total

Unit No. BD-006 has Metered Usage Required enabled but usage entered. Either enter usage or check Allow Zero Usage.

OK

					Rental Unit Price	Alt1 Rental Unit Price	Ur
EAST		6/7/2019	8/6/2019		8,000.00	0.00	

Click on **Allow Zero Usage**

16,320.00

ntal turn te	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Metered Usage Required
5/2019	8,000.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on the navigation menu item popup **Rental**

amics 365 Business Central

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00031

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**

ACT | WORK DATE: 8/6/2019

l Contract · RC00031

Contract Rental More options

als Return Rentals Bulk Returns **Invoice** Invoice and Print Po

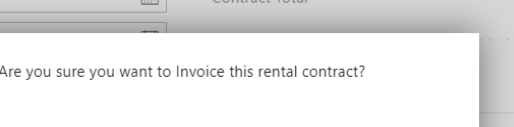
Finalize the document by posting the amounts a

er Name Adatum Corporation

7/6/2019

ODT Rentals Online Help

Click on the button **Yes**



Contract Total


Are you sure you want to Invoice this rental contract?

Yes No

Rental Unit Price

ND	1	EAST	6/7/2019	8/6/2019	8,000.00
----	---	------	----------	----------	----------

Click on the button **OK**



Contract Total

e Posted Successfully.

OK

				Rental Unit Price	Alt1 Rental Unit Price	Ur
EAST		6/7/2019	8/6/2019	8,000.00	0.00	

The following demonstrates the entry of the new meter reading on the rental line.

Click on the field **Posting Date**

The Posting Date entered is used in the creation of the usage tracking entry, when a Current Meter Reading or Metered Usage Qty. is entered on the rental line.

Rental	More options
<div> <div> <div>me</div> <div>Adatum Corporation</div> <div>▼</div> </div> <div> <div>7/6/2019</div> <div>6/7/2019</div> <div>7/6/2019</div> </div> </div>	

Click on the link **Open the date picker**



Click on the link **Next**

Adatum Corporation External Doc
Rental Terms
7/6/2019 Deposit Amo
July 2019 Contract Tot
Next Outstanding
Su Mo Tu We Th Fr Sa
1 2 3 4 5 6
7 8 9 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
Line Full 28 29 30 31

Click on a date in the calendar

o. 7/6/2019
Date 7/6/2019
ate August 2019
nt Date
Su Mo Tu We Th Fr Sa
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 26 27 28 29 30 31
Today Done
al Unit Standard Text Code Description Code Terms Rental
Quantity
006 : Buckeye Ditcher MONTH-PEND 1

Click on the cell **Current Meter Reading** with the value **8,400**

8/6/2019 Outstanding
ge Line Functions Fewer options
Allow Zero Usage Metered Usage Required Usage Unit of Measure Previous Meter Reading Current Meter Reading Metered Usage Qty. Currency Code Tax Group Code
8,400 8,400 0 SUPPLIES
e More options

Enter the text **8800**. Press the **Enter** key.

8/6/2019 Outstanding
ge Line Functions Fewer options
Allow Zero Usage Metered Usage Required Usage Unit of Measure Previous Meter Reading Current Meter Reading Metered Usage Qty. Currency Code Tax Group Code
8,400 8 0 SUPPLIES
e More options

To review the Usage Tracking entries, select the Rental Line menu option, Line, and then Metered Usage Entries.



ODT Rentals Online Help

Click on the cell **Transaction Date** with the value **8/6/2019**

The Transaction Date defaults from the Posting Date on the contract at the time of entry.

VIEW - BILLABLE USAGE TRACKING ENTRIES - BD-006 - BUCKEYE DITCHER

Rental Unit No. ↓	Transaction Date ↓	Entry Type ↓	Description
BD-006	8/6/2019	Metered Usage	Order: RC00

Click on the cell **Current Meter Reading** with the value **8,800.00**

The Usage Qty., Usage Unit of Measure and the Current Meter Reading default from the rental line.

Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed ↓	Invoice No.
400.00	HOURL	8,800.00		

Click on the button **Close**

Close

The Proforma Invoice can be previewed, saved or printed prior to invoicing the contract.

The following shows the menu steps to access the request page for printing the Proforma Invoice.

Click on the field **Posting Date**

Rental | More options

Adatum Corporation

8/6/2019

Type the date in the format M/d/yyyy



Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000

Process Contract Rental More options

General

Sell-to Customer Name Adatum Corporat

Quote No.

Click on the navigation menu item **Print Proforma**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000

Process **Contract** Rental More options

Print... **Print Proforma**

Prepare to print the proforma invoice. A report

Sell-to Customer Name Adatum Corporat

Quote No.

Posting Date 8/6/2019

Click on the field **Posting Date**

Rental More options

Adatum Corporation

8/6/2019

6/7/2019

8/6/2019

Type the date in the format M/d/yyyy

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00031

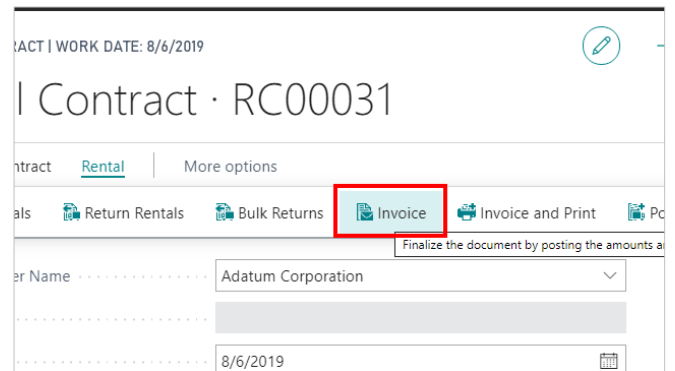
Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**



Contract | WORK DATE: 8/6/2019

Rental Contract · RC00031

Contract Rental | More options

als Return Rentals Bulk Returns **Invoice** Invoice and Print Po

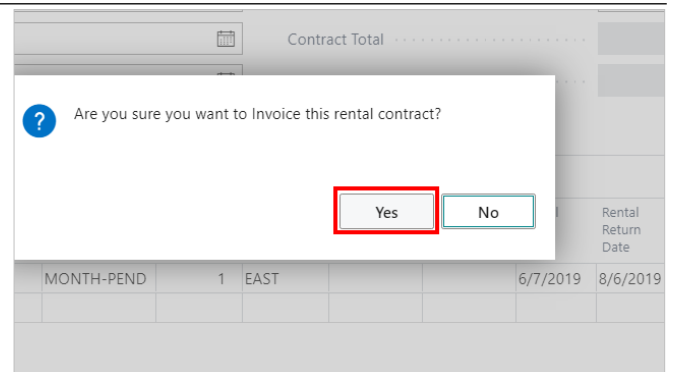
Finalize the document by posting the amounts a

er Name Adatum Corporation

.....

..... 8/6/2019

Click on the button **Yes**



Contract Total

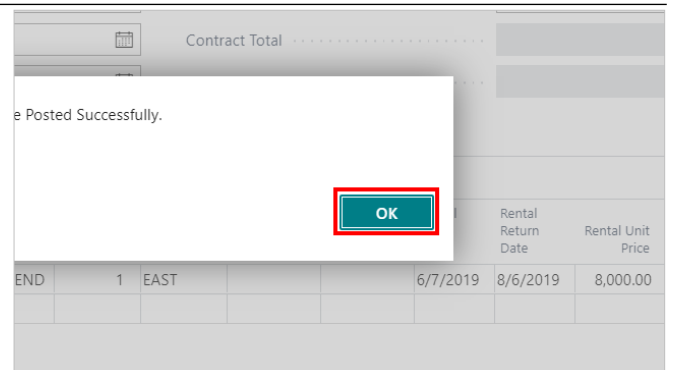
Are you sure you want to Invoice this rental contract?

Yes No

MONTH-PEND	1	EAST			6/7/2019	8/6/2019

Rental Return Date

Click on the button **OK**



Contract Total

Posted Successfully.

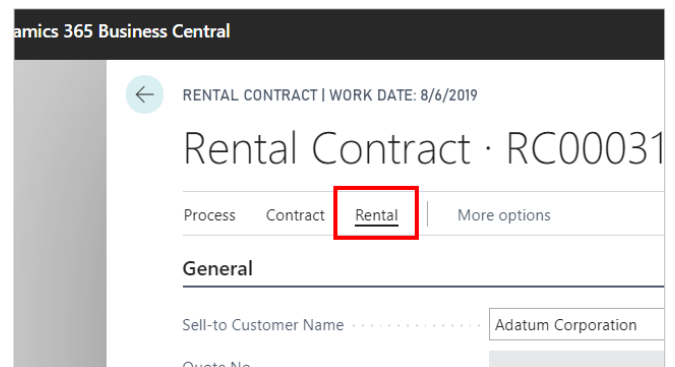
OK

END	1	EAST			6/7/2019	8/6/2019	8,000.00

Rental Return Date Rental Unit Price

The Posted Rental Invoice can be viewed, saved or printed using the following steps.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00031

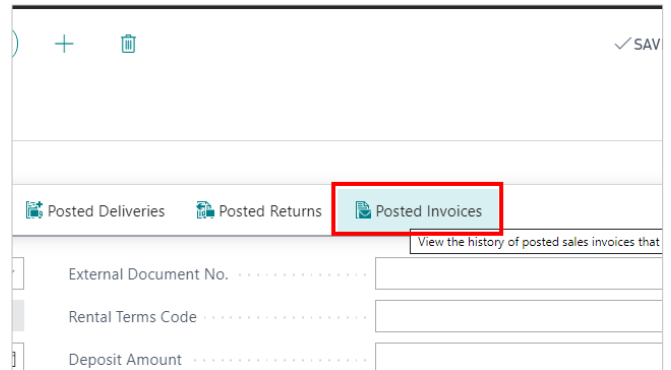
Process Contract Rental | More options

General

Sell-to Customer Name Adatum Corporation

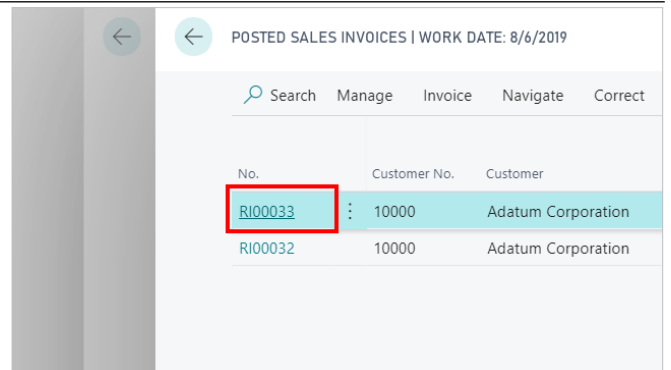
Quote No.

Click on the navigation menu item **Posted Invoices**



The screenshot shows the top navigation bar with three items: 'Posted Deliveries', 'Posted Returns', and 'Posted Invoices'. The 'Posted Invoices' item is highlighted with a red box. Below the navigation bar, there are input fields for 'External Document No.', 'Rental Terms Code', and 'Deposit Amount'.

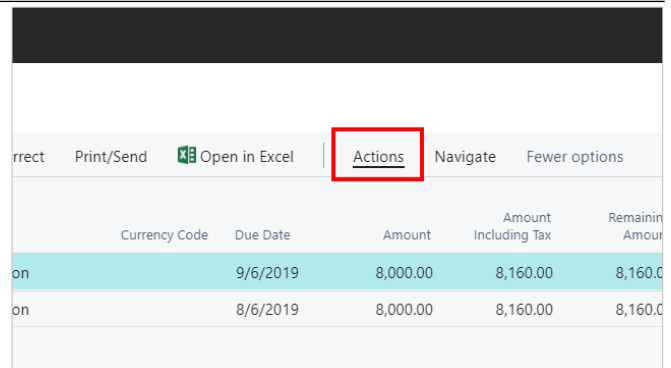
Click on the cell **No.** with the value **RI00033**



The screenshot shows a table titled 'POSTED SALES INVOICES | WORK DATE: 8/6/2019'. The table has three columns: 'No.', 'Customer No.', and 'Customer'. The 'No.' column is highlighted with a red box, and the value 'RI00033' is visible in the first row.

No.	Customer No.	Customer
RI00033	10000	Adatum Corporation
RI00032	10000	Adatum Corporation

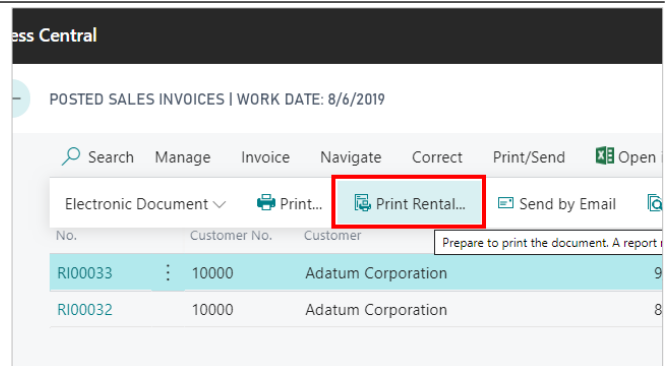
Click on the navigation menu item popup **Actions**



The screenshot shows the 'Actions' menu in the 'POSTED SALES INVOICES' table. The 'Actions' menu item is highlighted with a red box. The table below shows the invoice details for the selected line.

	Currency Code	Due Date	Amount	Amount Including Tax	Remaining Amount
on		9/6/2019	8,000.00	8,160.00	8,160.00
on		8/6/2019	8,000.00	8,160.00	8,160.00

Click on the link **Print Rental Invoice**



The screenshot shows the 'Print Rental Invoice' link in the 'POSTED SALES INVOICES' table. The link is highlighted with a red box. The table below shows the invoice details for the selected line.

No.	Customer No.	Customer	Amount
RI00033	10000	Adatum Corporation	8,160.00
RI00032	10000	Adatum Corporation	8,160.00

The Rental Amount Lines can be reviewed to verify the contract has been fully invoiced by selecting Line, then Rental Amount Lines.

When all records have the Billed field checked and the Invoice No. populated, then the contract has been fully invoiced up to the Rental Return Date specified on the rental lines.

The contract can be extended by either entering a Posting Date later than the Return Date on the line, or by changing the Return Date on the lines.

The following steps demonstrate the return of the unit, which will close the contract as it has been fully invoiced.

Click on the field **Posting Date**

Rental | More options

me Adatum Corporation Ext...

..... Rent

..... 8/6/2019 Depo

..... 6/7/2019 Cont

..... 8/6/2019 Outs

Type the date in the format M/d/yyyy

Click on the cell **Qty. to Return** with the value **0**

Outstanding Amount

Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Discount %	Ret... Day Billa...	Part... Retu Date
	SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	

Enter the text **1**.

Outstanding Amount

Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Discount %	Ret... Day Billa...	Part... Retu Date
	SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	

Click on the navigation menu item popup **Rental**

amics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00031

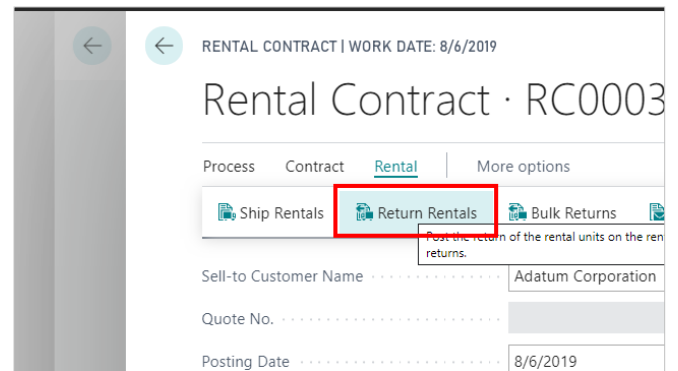
Process Contract **Rental** | More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Return Rentals**



RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC0003

Process Contract Rental More options

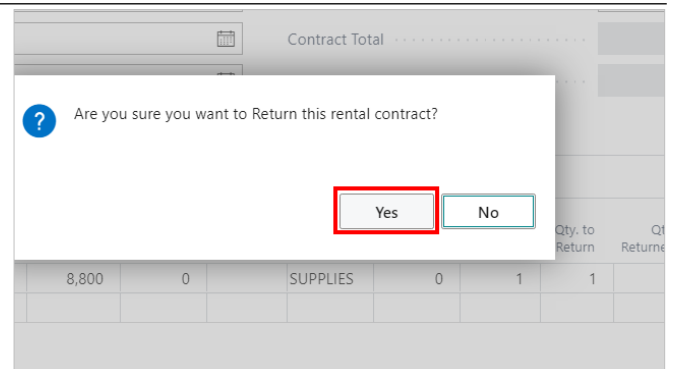
Ship Rentals **Return Rentals** Bulk Returns

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/6/2019

Click on the button **Yes**



Contract Total

Are you sure you want to Return this rental contract?

Yes No

8,800	0	SUPPLIES	0	1	1
-------	---	----------	---	---	---

4.1.9. How to Process Contracts with Metered Usage Pricing

4.1.9.1. How to Process Contracts with Usage Entered Each Period

The following demonstrates the processing of a rental contract for monthly periodic end billing, with a rental price of \$1200.00 per month, and 3 levels of metered usage pricing.

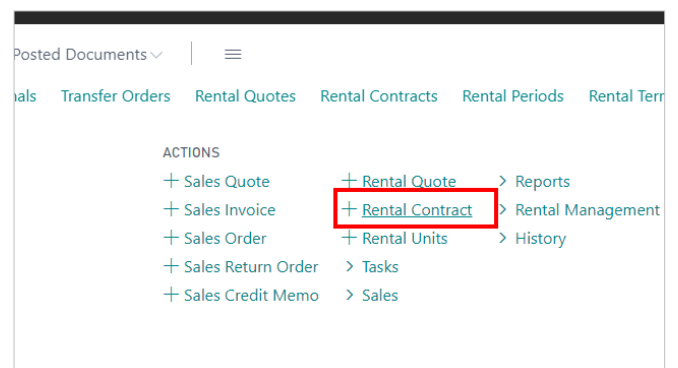
The contract is for 2 months and the metered usage will be entered at the end of the first period, and prior to returning the unit at the end of the second period.

In this example, the metered usage is based on a Unit of Measure of Miles.

The pricing for the metered usage is as follows:

- The first level has an allowance limit of 2000 miles, which is not billed to the customer.
- The second level has an allowance limit of 4000 miles with a price of \$1.00. Therefore any mileage from 2001 to 4000 miles will be billed to the customer at \$1.00 per mile.
- The third level has a price of \$2.00, which will be billed to the customer for any miles above 4000.

Click on the navigation menu item **Rental Contract**



Posted Documents ▾ | ≡

als Transfer Orders Rental Quotes Rental Contracts Rental Periods Rental Terr

ACTIONS

- + Sales Quote + Rental Quote > Reports
- + Sales Invoice **+ Rental Contract** > Rental Management
- + Sales Order + Rental Units > History
- + Sales Return Order > Tasks
- + Sales Credit Memo > Sales



ODT Rentals Online Help

Click on the field **Sell-to Customer Name**

Click on the link in cell **No.** with the value **10000**

Click on the cell **Rental Unit No.**

Click on the lookup button in the cell **Rental Unit No.**



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00023**

Manage		Line	Functions	Fewer options
Unit No.	Standard Text Code	Description		
...				
Manage		More options		

RU00021-001	Vibrator Plate for Mini Exc
RU00021-002	Vibrator Plate for Mini Exc
RU00021-003	Vibrator Plate for Mini Exc
RU00022	Wacker Skid Steer Group
RU00022-001	Wacker Skid Steer
RU00022-002	Wacker Skid Steer
RU00023	Ford 150 Trucks Group
RU00023-001	Ford 150 Trucks
RU00023-002	Ford 150 Trucks
RU00023-003	Ford 150 Trucks
RU00024	Wacker 50Z3 Excavator
RU00024-001	Wacker 50Z3 Excavator

Click on the cell **Rental Quantity** with the value **0**

Functions		Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Ford 150 Trucks Group	MONTH-PEND	0			

Enter the text **1**.

Functions		Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Ford 150 Trucks Group	MONTH-PEND	1			

Click on the cell **Location Code**

Fewer options					
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Trucks Group	MONTH-PEND				6/8/2020
		Look up value			



ODT Rentals Online Help

Click on a date in the calendar

As in this example the contract is for 2 months, the Rental Return Date is being modified with the expected date of return.

Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measure
	6/8/2020	7/7/20	1,200.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES
	6/8/2020				0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES

August 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Go to today Done

Unit Price Excl. Tax	Amount Including Tax	Line Discount %	Currency
0.00	*	0.00	0

Click on the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00023		Ford 150 Trucks Group	MONTH-PE
		Ford 150 Trucks Group	MONTH-PE

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00023		Ford 150 Trucks Group	MONTH-PE
		Ford 150 Trucks Group	MONTH-PE

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00023-001**

TRACT | WORK DATE: 6/8/2020

Contract · RC00041

Contract Rental | More options

Customer Name

6/8

Search Rental Open in Excel

RENTAL UNIT LIST

No. ↑	Description
→ RU00023-001	Ford 150 Trucks
RU00023-002	Ford 150 Trucks

ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 6/8/2020

Rental Contract · RC00041

Process

Contract

Rental

More options

General

Sell-to Customer Name

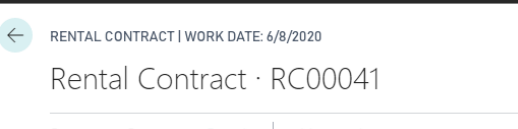
Quote No.

Posting Date

Adatum Corporation

6/8/2020






Click on the navigation menu item **Ship Rentals**



← RENTAL CONTRACT | WORK DATE: 6/8/2020

Rental Contract · RC00041

Process Contract Rental More options

 Ship Rentals  Return Rentals  Bulk Returns  Invoice  Inventory

Post the shipment of the rental units on the rental lines. A posted delivery document will be created.

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/8/2020

Click on the button **Yes**

A screenshot of a confirmation dialog box with a white background and a thin gray border. The dialog box contains a question mark icon in a teal circle on the left, followed by the text "Are you sure you want to Ship this rental contract?". At the bottom right of the dialog box, there are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red rectangular border, and the "No" button is highlighted with a teal rectangular border. The background of the screenshot is a blurred view of a software interface, showing a table with columns like "Alt1 Rental Unit Price" and "Alt2 Rental Unit Price", and a header "Outstanding Amount".

Click on the button **OK**

Shipment Posted Successfully.

OK

The next steps encompass the entry of a meter reading at the end of the first rental period, and the review of the Usage Tracking Entry created.



ODT Rentals Online Help

Click on the field **Posting Date**

More options

Adatum Corporation

6/8/2020

6/8/2020

6/8/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

6/8/2020

June 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Click on a date in the calendar

er Name

Adatum Corporation

6/8/2020

July 2020

Su Mo Tu We Th Fr Sa

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Go to today Done

Manage Line Functions

No. Standard Text Code Description Rental Terms Code Rental Quantity Location Code Ren

IMPORTANT:

The Posting Date cannot be earlier than the Transaction Date-Time of the most recent Usage Tracking Entry. Should the date be earlier an error will occur and the entry will not be allowed.



ODT Rentals Online Help

Click on the cell **Current Meter Reading** with the value **15,000**

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15,000	15,000	

Enter the text **19500**.

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15,000	19,500	

Click on the cell **Metered Usage Qty.** with the value **4,500**

When a Current Meter Reading is entered the Metered Usage Qty. is populated with the difference between the Previous Meter Reading and the Current Meter Reading entered.

Meter... Usage Enabled	Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	0	0	0	0		SUPPLIES
<input checked="" type="checkbox"/>	MILES	15,000	19,500	4,500	4,500		SUPPLIES

Click on the cell **Billable Metered Usage Qty.** with the value **4,500**

Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	0	0	0	0		SUPPLIES	0
MILES	15,000	19,500	4,500	4,500		SUPPLIES	0

The quantity in the Metered Usage Qty. field defaults to the Billable Metered Usage Qty. field.

The quantity in the Billable Metered Usage Qty. field is used for billing the customer. This quantity populates the Rental Amount Lines, which in turn are used for billing the customer.

The Billable Metered Usage Qty. can be modified on the Rental Line, should the quantity to be billed to the customer be different than the Metered Usage Qty., which is used for tracking the usage for maintenance



purposes.
The following demonstrates how to review the Usage Tracking Entry from the Billable Metered Usage Qty. field. Note that the Transaction Date is the same as the Posting Date on the contract, the Billable Usage Quantity and the Current Meter Reading are the same as on the Rental Line.

Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
0	0	0	0		SUPPLIES	0	0	
15,000	19,500	4,500	4,500		SUPPLIES	0	1	
Look up value								

Click on the cell **Transaction Date** with the value **7/7/2020**

Rental Unit No.	Transaction Date	Entry Type	Description
RU00023-001	7/7/2020	Metered Us...	Rental Contract: RC000041

Click on the cell **Billable Usage Quantity** with the value **4,500.00**

Customer Name	Usage Quantity	Billable Usage Quantity
Adatum Corporation	4,500.00	4,500.00

Click on the cell **Current Meter Reading** with the value **19,500.00**

Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.
4,500.00	4,500.00	MILES	19,500.00		



Click on the button **Close**

A screenshot of a software interface showing a modal window. The window has a title bar with '00 MILES' and a value of '19,500.00'. Below the title bar is a large empty space. At the bottom right of the modal, there is a button labeled 'Close' which is highlighted with a red rectangular box.

The following demonstrates how the Billable Metered Usage Quantity populates the Rental Amount Lines when the metered usage pricing is configured for 3 levels of usage pricing.

Click on the navigation menu item popup **Line**

A screenshot of a software interface showing a form with fields for 'Posting Date', 'Order Date', and 'Document Date', all set to 5/7/2019. Below these fields is a table with columns: 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. The 'Line' column is highlighted with a red box. Below the table is a list of rental units: 'RU00023' and 'RU00023-001'. The 'RU00023-001' row is highlighted with a blue background.

Click on the navigation menu item **Rental Amount Lines**

A screenshot of a software interface showing a form with fields for 'Order Date' (4/8/2019) and 'Document Date' (5/7/2019). Below these fields is a table with columns: 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer'. The 'Rental Amount Lines' column is highlighted with a red box. Below the table is a list of rental units: 'RU00023' and 'RU00023-001'. The 'RU00023-001' row is highlighted with a blue background.

Click on the cell **Unit Price Excl. Tax** with the value **0.00**

The Metered Usage Qty. on the rental amount lines, is allocated based on the allowance limits on the Rental Price card, for the rental term on the line.

A screenshot of a table titled 'AL AMOUNTS'. The table has columns: 'e-Time', 'Ending Date-Time', 'Extended Quantity', 'Unit Price Excl. Tax', 'Line Amount Excl. Tax', and 'Currency Cod'. The 'Unit Price Excl. Tax' column is highlighted with a red box. The table contains several rows of data, including a row with a value of 0.00 in the 'Unit Price Excl. Tax' column.

e-Time	Ending Date-Time	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Cod
12:00 A...	5/7/2019 11:59 PM	1	1,200.00	1,200.00	
12:00 A...	5/7/2019 11:59 PM	2,000	0.00	0.00	
12:00 A...	5/7/2019 11:59 PM	2,000	1.00	2,000.00	
12:00 A...	5/7/2019 11:59 PM	2,455	2.00	4,910.00	
12:00 A...	6/7/2019 11:59 PM	1	1,200.00	1,200.00	
12:00 A...	6/7/2019 11:59 PM	0	0.00	0.00	



ODT Rentals Online Help

Click on the button **Close**

2,000.00	2,040.00	SUPPLIE	
4,910.00	5,008.20	SUPPLIE	
1,200.00	1,224.00	SUPPLIE	0.00
0.00	0.00	SUPPLIE	9,496.20
			9,496.20

Close

Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage
------------------------------	-------------------------	--------------------------	----------------------	------------------------------	------------------------------	------------------------

Click on the navigation menu item popup **Rental**

amics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 5/7/2019

Rental Contract · RC00032

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**

ACT | WORK DATE: 5/7/2019

l Contract · RC00032

Contract **Rental** More options

als Return Rentals Bulk Returns **Invoice** Invoice and Print Po

Finalize the document by posting the amount

er Name Adatum Corporation

5/7/2019

Click on the button **Yes**

Contract Total

Are you sure you want to Invoice this rental contract?

Yes No

MONTH-PEND	1	EAST		4/8/2019	6/7/2019
MONTH-PEND	1	EAST		4/8/2019	6/7/2019



ODT Rentals Online Help

Click on the button **OK**

Contract Total

Posted Successfully.

OK

					Rental Return Date	Rental Unit Price	
END	1	EAST			4/8/2019	6/7/2019	1,200.00
END	1	EAST			4/8/2019	6/7/2019	1,200.00

Review of the Rental Amount Lines.

Click on the navigation menu item popup **Line**

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	R C
RU00023		Ford 150 Trucks Group	M
→ RU00023-001		Ford 150 Trucks	M

Click on the navigation menu item **Rental Usage
Tracking Entries**

4/8/2019 Contract Total

5/7/2019 Outstanding Amount

Functions | Fewer options

ental Ledger Entries | Rental Value Entries | **Rental Usage Tracking Entries** | Addi

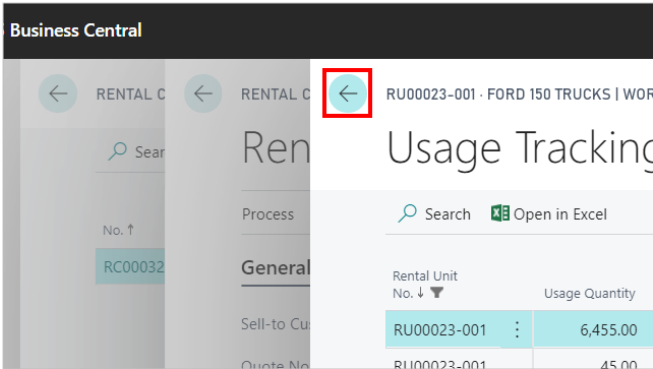
Ford 150 Trucks Group	MONTH-PEND	1	EAST	
Ford 150 Trucks	MONTH-PEND	1	EAST	

Click on the cell **Invoice No.** with the value **RI00034**

ing Entries

ntity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.	Entry No.
5.00	MILES	6,500.00	<input checked="" type="checkbox"/>	RI00034	6
5.00	MILES	45.00	<input type="checkbox"/>	RI00034	5

Click on the back button



The following demonstrates the entry of the metered usage, and posting the final invoice.

Click on the field **Posting Date**

Rental | More options

Adatum Corporation

5/7/2019

4/8/2019

5/7/2019

Type the date in the format M/d/yyyy

Click on the link **Open the date picker**

Adatum Corporation

19

19

19

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

5/7/2019

May 2019

Next

Line Full



Click on a date in the calendar

5/7/2019

June 2019

Su	Mo	Tu	We	Th	Fr	Sa
					7	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Standard Text Code

Today Done

Terms Rental Quantity Location Code

Ford 150 Trucks Group MONTH-PEND 1 EAST

Click on the cell **Metered Usage Qty.** with the value **0**

Functions Fewer options

Metered Usage Qty.	Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Currency Code	Tax Group Code	Qty. to Rent
<input checked="" type="checkbox"/>	MILES	0	0	0		SUPPLIES	0
<input checked="" type="checkbox"/>	MILES	6,500	6,500	0		SUPPLIES	0
<input type="checkbox"/>				Look up value			

Options

Enter **Metered Usage Qty.**. Press the **Enter** key.

Functions Fewer options

Metered Usage Qty.	Usage Unit of Measure	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Currency Code	Tax Group Code	Qty. to Rent
<input checked="" type="checkbox"/>	MILES	0	0	0		SUPPLIES	0
<input checked="" type="checkbox"/>	MILES	6,500	6,500	0		SUPPLIES	0
<input type="checkbox"/>							

Options

Click on the navigation menu item popup **Rental**

Amics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00032

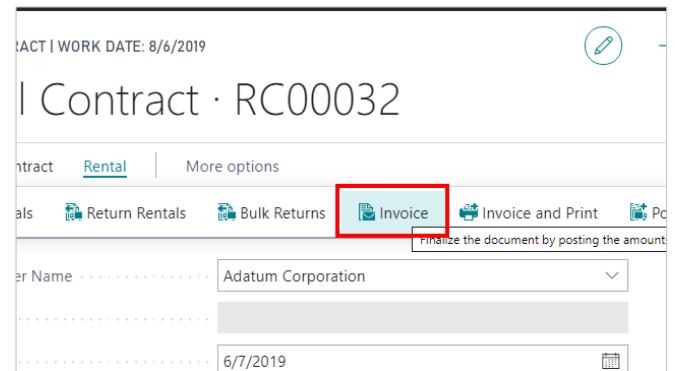
Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**



Contract | WORK DATE: 8/6/2019

Contract · RC00032

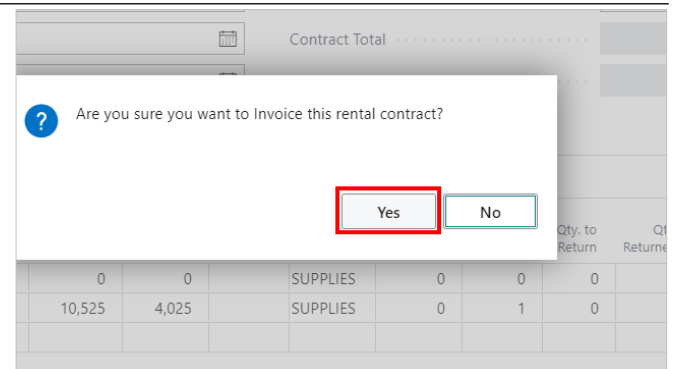
Contract Rental More options

Return Rentals Bulk Returns **Invoice** Invoice and Print

Customer Name Adatum Corporation

6/7/2019

Click on the button **Yes**



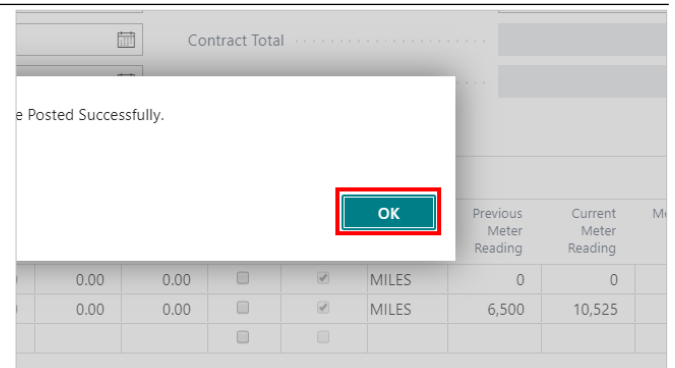
Contract Total

Are you sure you want to Invoice this rental contract?

Yes No

	0	0		0	0	0
	10,525	4,025	SUPPLIES	0	1	0

Click on the button **OK**



Contract Total

Posted Successfully.

OK

	0.00	0.00		0	0
	0.00	0.00	MILES	6,500	10,525

4.1.10. How to Revise a Current Meter Reading after Entry

4.1.10.1. Overview

Before invoicing, the Current Meter Reading that has been entered on the Rental Line can be modified.

When the Posting Date is the same as the date when the initial reading was entered, then the initial Usage Tracking Entry will be modified.

When the Posting Date is a different date than the initial meter reading entry, then a second Usage Tracking Entry will be created, with the Usage Quantity and the Billable Usage Quantity being equal to the difference between the initial meter reading and the revised meter reading.

4.1.10.2. Revising the Current Meter Reading on the Same Posting Date

The following demonstrates the entry and revising of the initial meter reading, when setting the Posting Date to be the same as the Transaction Date on the initially entered Current Meter Reading.



Click on the field **Posting Date**

More options

Adatum Corporation

4/10/2020

4/10/2020

4/10/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

4/10/2020

April 2020

Su Mo Tu We Th Fr Sa

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30

Click on a date in the calendar

Select the date that the metered reading was taken on.

Adatum Corporation

4/10/2020

May 2020

Su Mo Tu We Th Fr Sa

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Go to today Done

Description Code Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2



Click on the cell **Current Meter Reading** with the value **15**

Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	15	0	0	

Enter the text **6515**.

Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	15	0	0	

Click on the cell **Metered Usage Qty.** with the value **6,500**

The Metered Usage Qty. is automatically calculated and the quantity is displayed.

The look-up will display then Rental Usage Tracking Entry created with a Transaction Date, which is populated from the Posting Date on the contract.

Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	15	6,515	6,500	6,500		SUPPLIES

Click on the cell **Billable Metered Usage Qty.** with the value **6,500**

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	15	6,515	6,500	6,500		SUPPLIES	0

Note that the Billable Metered Usage Qty. is automatically populated with the same quantity. The Billable Metered Usage Qty. is used for billing customers, where as the Metered Usage Qty. is used for tracking usage for maintenance purposes.



ODT Rentals Online Help

Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
15	6,515	6,500	6,500		SUPPLIES	0	1	

Click on the cell **Transaction Date** with the value **5/9/2020**

Note that the Transaction Date is set to the Posting Date on the contract.

Rental Unit No. ↓	Transaction Date ↓	Entry Type ↓	Description
RU00023-003	5/9/2020	Metered Usage	Rental Contract: RC

Click on the cell **Billable Usage Quantity** with the value **6,500.00**

Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
6,500.00	6,500.00	MILES	

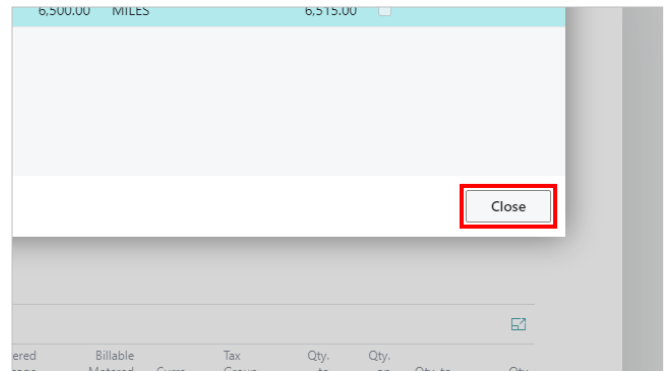
Click on the cell **Current Meter Reading** with the value **6,515.00**

Note that the Current Meter Reading is 6515, which was entered on the line, and the Usage Quantity and Billable Usage Quantity are 6500.

Quantity	Billable Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed ▼	Invoice No.
500.00	6,500.00	MILES	6,515.00		

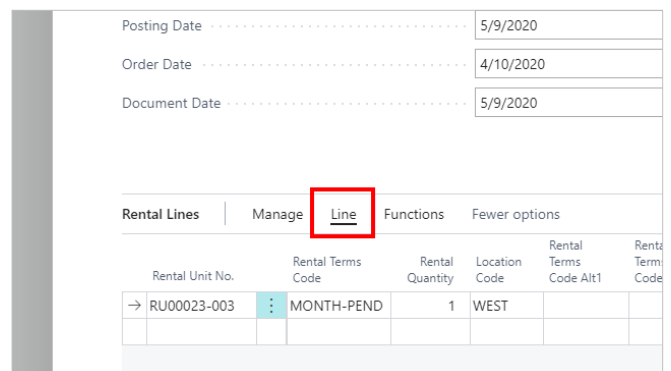


Click on the button **Close**

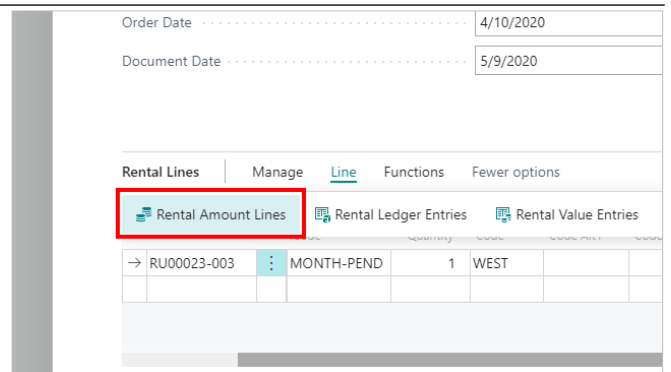


When the Billable Usage Tracking Entry is created with a Type of Metered Usage, then the Rental Amount Lines are created, which can be reviewed using the following steps.

Click on the navigation menu item popup **Line**



Click on the navigation menu item **Rental Amount Lines**



Click on the cell **Extended Quantity** with the value **2,000**

The 6500 miles is allocated based on the allowance limits and prices on the rental price card for the rental term on the rental line. Level 1, 2000 miles at zero price, Level 2, 2000 miles at 1.00 per mile and level 3 2500 miles at 2.00 per mile.

AMOUNTS			
ing Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax
5/2020 12:00 AM	5/9/2020 11:59 PM	1	1,200.00
5/2020 12:00 AM	5/9/2020 11:59 PM	2,000	0.00
5/2020 12:00 AM	5/9/2020 11:59 PM	2,000	1.00
5/2020 12:00 AM	5/9/2020 11:59 PM	2,500	2.00



ODT Rentals Online Help

Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
15	6,715	6,700	6,700		SUPPLIES	0

Click on the cell **Billable Usage Quantity** with the value **6,700.00**

Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
6,700.00	6,700.00	MILES	

Click on the cell **Current Meter Reading** with the value **6,715.00**

Note that the record fields of Usage Quantity, Billable Usage Quantity and Current Meter Reading have been revised to reflect the new reading entered. This occurs when the date the revised Current Meter Reading was entered is the same date as the initial entry, and the initial meter reading/usage had not been billed and is still open.

Quantity	Billable Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.
700.00	6,700.00	MILES	6,715.00		

Click on the button **Close**

6,700.00	MILES	6,715.00
----------	-------	----------

Close



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date5/9/2020

Order Date4/10/2020

Document Date5/9/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Code
→ RU00023-003	MONTH-PEND	1	WEST		

Click on the navigation menu item **Rental Amount Lines**

Order Date4/10/2020

Document Date5/9/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Amount Lines

Rental Ledger Entries

Rental Value Entries

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Code
→ RU00023-003	MONTH-PEND	1	WEST		

Click on the cell **Extended Quantity** with the value **2,700**

Note that the Level 3 quantity on the Rental Amount line has been revised from 2500 to 2700 to reflect the revision of the Billable Usage Quantity on the Billable Usage Tracking Entry.

ing Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax
5/9/2020 12:00 AM	5/9/2020 11:59 PM	1	1,200.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,000	0.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,000	1.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,700	2.00

Click on the button **Close**

1,224.00	SUPPLIES	5/9/2020	<input type="checkbox"/>
0.00	SUPPLIES	5/9/2020	<input type="checkbox"/>
2,040.00	SUPPLIES	5/9/2020	<input type="checkbox"/>
5,508.00	SUPPLIES	5/9/2020	<input type="checkbox"/>

Close

Previous Meter

Current Meter

Metered Usage

Billable Metered

Current

Tax Group

Qty.

The following demonstrates what occurs when the Current Meter Reading is reset to match the Previous Meter Reading when an invoice has not been posted for the last meter reading entered above.

Click on the cell **Current Meter Reading** with the value **6,715**

Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	6,715	6,700	6,700 ...	

Enter the text **15**.

Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	15	6,700	6,700	

Move off the Current Meter Reading field. This will trigger the following confirmation message regarding the Metered Usage Entries.

Click on the button **Yes**

When yes is selected, then the usage tracking entries will be deleted.

When no is selected, then the current meter reading will be reset to the quantity before making this last modification.

ental tart ate	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading
10/2020	5/9/2020	1,200.00	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15

Click on the cell **Billable Metered Usage Qty.** with the value **0**

Note that the Billable Metered Usage Qty. and the Metered Usage Qty. are reset to zero, which means there are no Usage Tracking Entries, and thus there will be no quantities in the Rental Amount Lines to be billed.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	15	15	0	0		SUPPLIES	0

4.1.10.3. Date

Revising the Current Meter Reading on a Different Posting

The following demonstrates the entry and revising of the initial meter reading, when setting the Posting Date to be a later date than the Transaction Date on the initially entered Current Meter Reading.



ODT Rentals Online Help

Click on the field **Posting Date**

More options

Adatum Corporation

4/10/2020

4/10/2020 Type the date in the format M/d/yyyy

4/10/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

4/10/2020

April 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30

Click on a date in the calendar

Make sure to set the Posting Date to the date the initial meter reading was taken.

Adatum Corporation

4/10/2020

May 2020

Su Mo Tu We Th Fr Sa

1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Go to today Done

Line Functions

Standard

Description Code Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2



ODT Rentals Online Help

Click on the cell **Current Meter Reading** with the value **15**

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	15	0

Enter the text **6515**.

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	6515	0

Click on the cell **Metered Usage Qty.** with the value **6,500**

The Metered Usage Qty. is automatically calculated and the quantity is displayed.

The look-up will display then Rental Usage Tracking Entry created with a Transaction Date, which is populated from the Posting Date on the contract.

Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	15	6,515	6,500	6,500		SUPPLIES

Click on the cell **Billable Metered Usage Qty.** with the value **6,500**

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	15	6,515	6,500	6,500		SUPPLIES	0

Note that the Billable Metered Usage Qty. is automatically populated with the same quantity. The Billable Metered Usage Qty. is used for billing customers, where as the Metered Usage Qty. is used for tracking usage for maintenance purposes.



Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
15	6,515	6,500	6,500		SUPPLIES	0	1	

Click on the cell **Transaction Date** with the value **5/1/2020**

Note that the Transaction Date is set to the Posting Date on the contract.

Rental Unit No. ↓	Transaction Date ↓	Entry Type ↓	Description
RU00023-003	5/1/2020	Metered Usage	Rental Contract: RC

Click on the cell **Billable Usage Quantity** with the value **6,500.00**

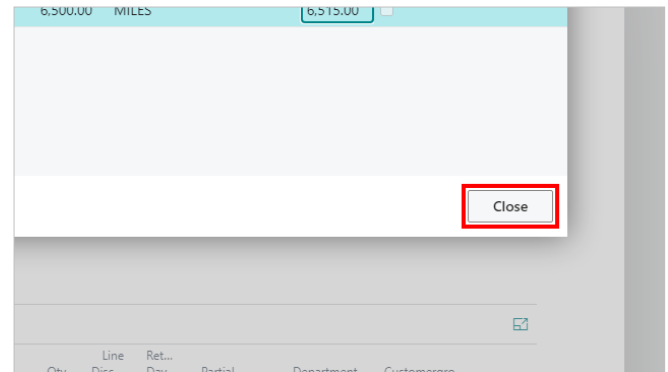
Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
6,500.00	6,500.00	MILES	6,500.00

Click on the cell **Current Meter Reading** with the value **6,515.00**

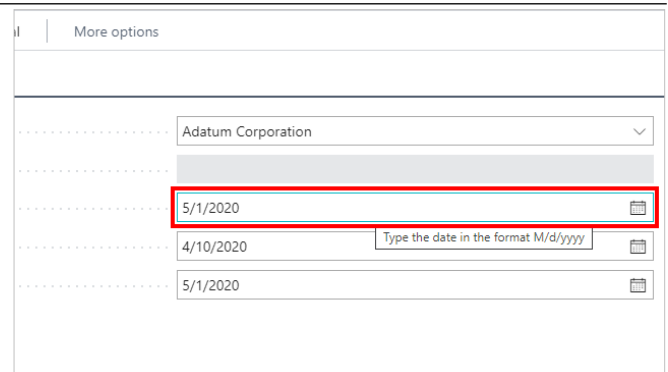
Note that the Current Meter Reading is 6515, which was entered on the line, and the Usage Quantity and Billable Usage Quantity are 6500.

Quantity	Billable Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed ▼	Invoice No.
500.00	6,500.00	MILES	6,515.00		

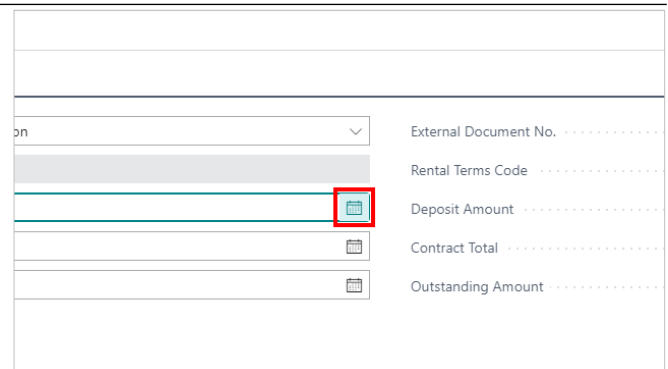
Click on the button **Close**



Click on the field **Posting Date**

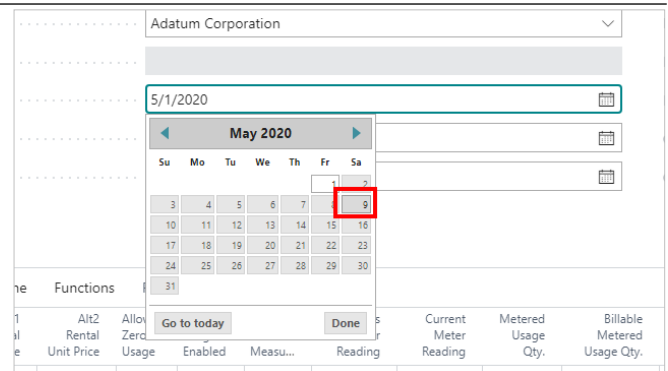


Click on the link **Open the date picker**



Click on a date in the calendar

Make sure to set the Posting Date to the date the meter reading was taken.
In this example, the second reading is being entered on the Rental Return Date.





ODT Rentals Online Help

Click on the cell **Current Meter Reading** with the value **6,515**

Actions Fewer options								
Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	6,515	6,500	6,500	

Enter the text **6700**.

Actions Fewer options								
Alt2 ental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	15	6,515	6,500	6,500	

Click on the cell **Metered Usage Qty.** with the value **6,685**

Fewer options								
Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	
<input checked="" type="checkbox"/>	MILES	15	6,700	6,685	6,685 ...		SUPPLIES	

Click on the cell **Billable Metered Usage Qty.** with the value **6,685**

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Q...
MILES	15	6,700	6,685 ...	6,685		SUPPLIES	0	

Notice that both the Metered Usage Qty. and the Billable Metered Usage Qty. updated to the total difference between the Previous Meter Reading and the Current Meter Reading just entered.



Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
15	6,700	6,685	5,685		SUPPLIES	0	1	

Click on the cell **Transaction Date** with the value **5/9/2020**

Rental Unit No. ↓	Transaction Date ↓	Entry Type ↓	Description
RU00023-003	5/9/2020	Metered Usage	Rental Contract: RC
RU00023-003	5/1/2020	Metered Usage	Rental Contract: RC

Click on the cell **Billable Usage Quantity** with the value **185.00**

Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
185.00	185.00	MILES	
6,500.00	6,500.00	MILES	

The Usage Quantity and the Billable Usage Quantity fields on the new record have a quantity which is the difference between the total quantity on the rental line and the quantity in the first usage tracking entry, Usage Quantity and Billable Usage Quantity fields.

Click on the cell **Current Meter Reading** with the value **6,700.00**

Note that the Current Meter Reading is 6700, which was entered on the rental line.

Quantity	Billable Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed ▼	Invoice No.
185.00	185.00	MILES	6,700.00		
500.00	6,500.00	MILES	6,700.00		



ODT Rentals Online Help

Click on the button **Close**

185.00	MILES	6,700.00	<input type="checkbox"/>
6,500.00	MILES	6,700.00	<input type="checkbox"/>

Close

Click on the navigation menu item popup **Line**

Posting Date	5/9/2020
Order Date	4/10/2020
Document Date	5/9/2020

Rental Lines	Manage	Line	Functions	Fewer options	
Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...
→ RU00023-003	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES

Click on the navigation menu item **Rental Amount Lines**

Order Date	4/10/2020
Document Date	5/9/2020

Rental Lines	Manage	Line	Functions	Fewer options
Rental Amount Lines	Rental Ledger Entries	Rental Value Entries		

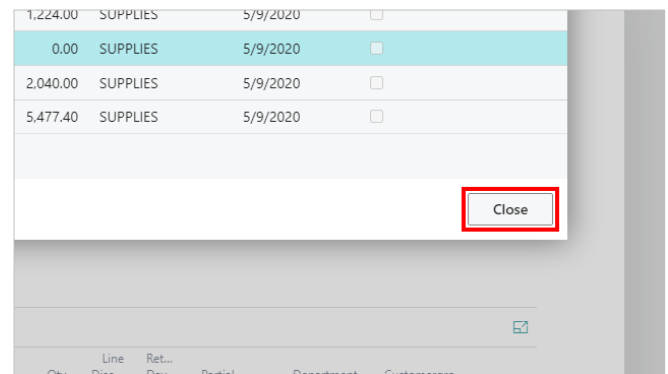
→ RU00023-003	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES
---------------	------	------	--------------------------	-------------------------------------	-------

Click on the cell **Extended Quantity** with the value **2,685**

Note that the Level 3 quantity on the Rental Amount line has been revised from 2500 to 2685 to reflect the revision of the Billable Usage Quantity on the Billable Usage Tracking Entry.

ng Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax
5/9/2020 12:00 AM	5/9/2020 11:59 PM	1	1,200.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,000	0.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,000	1.00
5/9/2020 12:00 AM	5/9/2020 11:59 PM	2,685	2.00

Click on the button **Close**



4.1.11. How to Process a Contract with Multiple Meter Readings Entered

4.1.11.1. Overview

The following demonstrates the processing of a rental contract for monthly periodic end billing, with a rental price of \$1200.00 per month and 3 levels of metered usage pricing.

The contract is for 1 month. A meter reading will be entered 4 times during the month with the Posting Date set to the date the reading was taken, and at the end of the contract on the Rental Return Date.

A review of the usage entries will performed after the last meter reading has been entered.

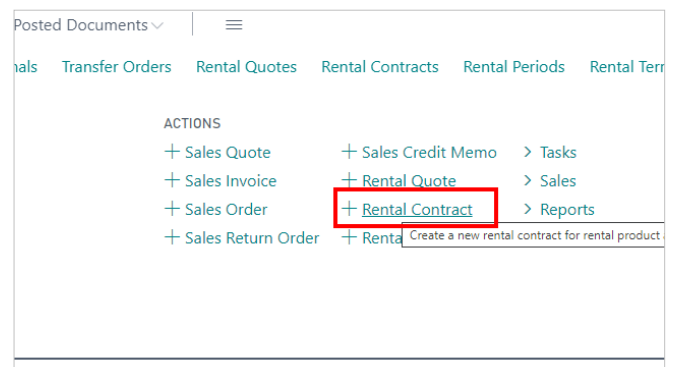
The rental charge and the metered usage will be billed at the end of the one month contract.

The pricing for the metered usage is as follows:

- The first level has an allowance limit of 2000 miles, which is not billed to the customer.
- The second level has an allowance limit of 4000 miles with a price of \$1.00. Therefore any mileage from 2001 to 4000 miles will be billed to the customer at \$1.00 per mile.
- The third level has a price of \$2.00, which will be billed to the customer for any miles above 4000.

4.1.11.2. Processing a Contract Entering Multiple Readings in a Rental Period

Click on the navigation menu item **Rental Contract**





ODT Rentals Online Help

Click on the field **Sell-to Customer Name**

Click on the link in cell **No.** with the value **10000**

Click on the cell **Rental Unit No.**

Click on the lookup button in the cell **Rental Unit No.**

ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00023**

[illegible]

Click on the cell **Rental Quantity** with the value **0**

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Ford 150 Trucks Group	MONTH-PEND	0			

Enter the text **1**.

Functions Fewer options					
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Ford 150 Trucks Group	MONTH-PEND	<input type="text" value="1"/>			

Click on the cell **Location Code**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental End Date
Trucks Group	MONTH-PEND	1				7/10/2020	8/10/2020



Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
Group	MONTH-PEND	1	<input type="text" value=""/>			7/10/2020	8/9/2020
Group	MONTH-PEND	1					
			Code ↑	Name			
			→ CENTRAL	Central Warehouse			
			EAST	East Warehouse			
			REN	Select record "EAST" Inventory Items Rental Rese			
			SOUTH	South Warehouse			
			TEMP	Temporary Location			
			WEST	West Warehouse			
			+ New				
				0		0.00	*

Click on the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code				
→ RU00023	:	Ford 150 Trucks Group	MONTH-PEN				
	:	Ford 150 Trucks Group	MONTH-PEN				
</							

ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 7/10/2020

Rental Contract · RC00044

Process

Contract

Rental

More options

General

Sell-to Customer Name	Adatum Corporation
Quote No.	
Posting Date	7/10/2020






Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 7/10/2020

Rental Contract · RC00044

Process Contract Rental More options

 Ship Rentals  Return Rentals  Bulk Returns  Invoice  Inventory

Sell-to Customer Name	Adatum Corporation
Quote No.	
Posting Date	7/10/2020

Click on the button **Yes**

Are you sure you want to Ship this rental contract?

Yes No

Click on the button **OK**

Shipment Posted Successfully.

OK



ODT Rentals Online Help

Click on the field **Posting Date**

More options

Adatum Corporation

7/10/2020

7/10/2020

7/10/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Select the date one week out from the Rental Start Date.

7/10/2020

July 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Go to today Done

Standard Text Code Description Rental Terms Code Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code

Ford 150 Trucks Group MONTH-PEND 1 EAST

Click on the cell **Current Meter Reading** with the value **17,900**

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	17,900	0



ODT Rentals Online Help

Enter the text **18800**. Press the **TAB** key.

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	17,900	0

Click on the cell **Metered Usage Qty.** with the value **900**

Notice that the Metered Usage Qty. field becomes populated with the difference between the Current Meter Reading and the Previous Meter Reading.

Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billa Meter Usage C
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	18,800	900	

Click on the cell **Billable Metered Usage Qty.** with the value **900**

Notice that the Billable Metered Usage Qty. is updated to be the same as the Metered Usage Qty.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	0	0	0	0		SUPPLIES	0
MILES	17,900	18,800	900	900		SUPPLIES	0

Click on the field **Posting Date**

More options

Adatum Corporation

7/16/2020

7/10/2020

7/16/2020



ODT Rentals Online Help

Click on the link **Open the date picker**

on	External Document No.
	Rental Terms Code
	Deposit Amount
	Contract Total
	Outstanding Amount

Click on a date in the calendar

In this example, the date selected is 6 days after the last meter reading entered.

7/16/2020							
July 2020							
Su Mo Tu We Th Fr Sa							
5 6 7 8 9 10 11							
12 13 14 15 16 17 18							
19 20 21 22 23 24 25							
26 27 28 29 30 31							
Go to today Done							
Manage Line Functions							
Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Meter Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	18,800	900

Click on the cell **Current Meter Reading** with the value **18,800**

Actions	Fewer options							
Alt2 Rental Price	Allow Zero Usage	Meter Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	18,800	900	900	

Enter the text **19800**. Press the **TAB** key.

Actions	Fewer options							
Alt2 Rental Price	Allow Zero Usage	Meter Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	18,800	900	900	



Click on the cell **Metered Usage Qty.** with the value **1,900**

Notice that the Metered Usage Qty. field becomes populated with the difference between the Current Meter Reading and the Previous Meter Reading.

More options							
Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	0	0	0	0		SUPPLIES
<input checked="" type="checkbox"/>	MILES	17,900	19,800	1,900	1,900		SUPPLIES
				Look up value			

Click on the cell **Billable Metered Usage Qty.** with the value **1,900**

Notice that the Billable Metered Usage Qty. is updated to be the same as the Metered Usage Qty.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	0	0	0	0		SUPPLIES	0
MILES	17,900	19,800	1,900	1,900		SUPPLIES	0

Click on the field **Posting Date**

More options

Adatum Corporation

7/22/2020

7/10/2020

7/22/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount



Click on a date in the calendar

7/22/2020

July 2020

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Manage Line Functions

Go to today Done

No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
02	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0
	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	19,800	1,900

Click on the cell **Current Meter Reading** with the value **19,800**

Functions Fewer options

Alt2 Rental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	19,800	1,900	1,900	

\$

Enter the text **20725**. Press the **TAB** key.

Functions Fewer options

Alt2 Rental Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0	0	
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	20,725	2,825	2,825	

\$

Click on the cell **Metered Usage Qty.** with the value **2,825**

Notice that the Metered Usage Qty. field becomes populated with the difference between the Current Meter Reading and the Previous Meter Reading.

Fewer options

Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	0	0	0	0		SUPPLIES
<input checked="" type="checkbox"/>	MILES	17,900	20,725	2,825	2,825		SUPPLIES

Look up value



ODT Rentals Online Help

Click on the cell **Billable Metered Usage Qty.** with the value **2,825**

Notice that the Billable Metered Usage Qty. is updated to be the same as the Metered Usage Qty.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	R
MILES	0	0	0	0		SUPPLIES	0	
MILES	17,900	20,725	2,825	2,825		SUPPLIES	0	

Click on the field **Posting Date**

More options

Adatum Corporation

7/28/2020

7/10/2020

7/28/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

Click on the link **Next**

Adatum Corporation

7/28/2020

August 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Functions



ODT Rentals Online Help

Click on the cell **Billable Metered Usage Qty.** with the value **3,825**

Notice that the Billable Metered Usage Qty. is updated to be the same as the Metered Usage Qty.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	R
MILES	0	0	0	0		SUPPLIES	0	
MILES	17,900	21,725	3,825	3,825		SUPPLIES	0	

Click on the field **Posting Date**

More options

Adatum Corporation

8/3/2020

7/10/2020

8/3/2020

Type the date

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

The date selected is the same as the Rental Return Date on the Rental Line.

e No.

ng Date

r Date

ment Date

August 2020

8/3/2020

Go to today

Done

Rental Unit No. : Ford 150 Trucks Group MONTH-PEND 1 EAST



ODT Rentals Online Help

Click on the cell **Current Meter Reading** with the value **21,725**

Alt2 Rental Unit Price	Allow Zero Usage	Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	0	0	0
0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MILES	17,900	21,725	3,825
					21,725	

Enter the text **22400**.

					3,085.50	
					3,085.50	

Click on the cell **Metered Usage Qty.** with the value **4,500**

Notice that the Metered Usage Qty. field becomes populated with the difference between the Current Meter Reading and the Previous Meter Reading.

Meter... Usage Enabled	Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code
<input checked="" type="checkbox"/>	MILES	0	0	0	0		SUPPLIES
<input checked="" type="checkbox"/>	MILES	17,900	22,400	4,500	4,500		SUPPLIES

Click on the cell **Billable Metered Usage Qty.** with the value **4,500**

Notice that the Billable Metered Usage Qty. is updated to be the same as the Metered Usage Qty.

Usage Unit of Measu...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent
MILES	0	0	0	0		SUPPLIES	0
MILES	17,900	22,400	4,500	4,500		SUPPLIES	0



Click on the lookup button in the cell **Billable Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return
0	0	0	0		SUPPLIES	0	0	
17,900	22,400	4,500	4,500		SUPPLIES	0	1	

Expand the page by clicking on the arrow in the upper right corner.

Click on the cell **Transaction Date** with the value **8/9/2020**

Note there is an entry for each meter reading entered with the Transaction Date set to be the same as the Posting Date on the contract at the time of the reading.

Rental Unit No. ↓	Transaction Date ↓	Entry Type ↓	Description
RU00023-002	8/9/2020	Metered Usage	Rental Contract: RC
RU00023-002	8/3/2020	Metered Usage	Rental Contract: RC
RU00023-002	7/28/2020	Metered Usage	Rental Contract: RC
RU00023-002	7/22/2020	Metered Usage	Rental Contract: RC
RU00023-002	7/16/2020	Metered Usage	Rental Contract: RC

Click on the cell **Billable Usage Quantity** with the value **675.00**

The sum of the Billable Metered Usage Qty. on the records is 4500.

Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
675.00	675.00	MILES	
1,000.00	1,000.00	MILES	
925.00	925.00	MILES	
1,000.00	1,000.00	MILES	
900.00	900.00	MILES	

Click on the button **Close**

675.00	MILES	22,400.00	<input type="checkbox"/>
1,000.00	MILES	22,400.00	<input type="checkbox"/>
925.00	MILES	22,400.00	<input type="checkbox"/>
1,000.00	MILES	22,400.00	<input type="checkbox"/>
900.00	MILES	22,400.00	<input type="checkbox"/>
Close			



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date8/9/2020

Order Date7/10/2020

Document Date8/9/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Code
RU00023	MONTH-PEND	1	EAST		
→ RU00023-002	MONTH-PEND	1	EAST		

Click on the navigation menu item **Rental Amount Lines**

Order Date7/10/2020

Document Date8/9/2020

Rental Lines

Manage

Line

Functions

Fewer options

Rental Amount Lines

Rental Ledger Entries

Rental Value Entries

Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Term Code
RU00023	MONTH-PEND	1	EAST		
→ RU00023-002	MONTH-PEND	1	EAST		

Expand the page by clicking on the arrow in the upper right corner.

Click on the cell **Extended Quantity** with the value **2,000**

The Rental Amount Lines for Metered Usage are created from the sum of Billable Metered Usage Qty. records in the Metered Usage Tracking Entries. The total quantity is allocated on the Rental Amount Lines based on the allowance limits.

AMOUNTS				
ing Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	
7/2020 12:00 AM	8/9/2020 11:59 PM	1	1,200.00	
7/2020 12:00 AM	8/9/2020 11:59 PM	2,000	0.00	
7/2020 12:00 AM	8/9/2020 11:59 PM	2,000	1.00	
7/2020 12:00 AM	8/9/2020 11:59 PM	500	2.00	

Click on the button **Close**

1,224.00	SUPPLIES	8/9/2020	<input type="checkbox"/>
0.00	SUPPLIES	8/9/2020	<input type="checkbox"/>
2,040.00	SUPPLIES	8/9/2020	<input type="checkbox"/>
1,020.00	SUPPLIES	8/9/2020	<input type="checkbox"/>
Close			

Previous MeterCurrent MeterMetered UsageBillable MeteredCurTax GroupQty. to

The following demonstrates the Proforma Invoice for the rental period in which the meter readings were entered.



Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00044 | WORK DATE: 8/8/2020

Rental Contract · RC00044

Process Contract Rental More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/9/2020

Click on the navigation menu item **Print Proforma**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00044 | WORK DATE: 8/8/2020

Rental Contract · RC00044

Process Contract Rental More options

Print... **Print Proforma**

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/9/2020

Click on the toggle field Print Company Address

20

RENTAL - PROFORMA INVOICE

Options

Number of Copies 0

Print Company Address

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usa... .. ☐

Cut-off Date 8/8/2020

Click on the field **Cut-off Date**

Number of Copies 0

Print Company Address ☒

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usa... .. ☐

Cut-off Date 8/8/2020

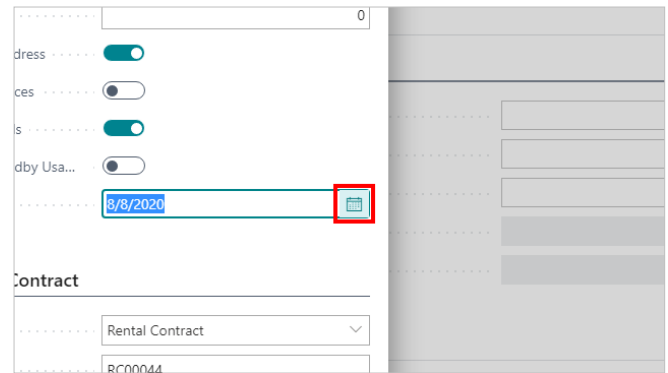
Filter: Rental Contract

× Document Type Rental Contract

× No. RC00044

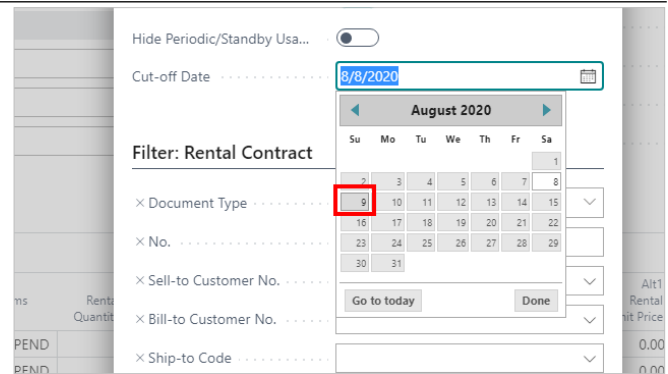
ODT Rentals Online Help

Click on the link **Open the date picker**



The screenshot shows a form with several fields and a date picker. The date picker is open, showing a calendar for August 2020. The date 8/8/2020 is selected and highlighted with a red box. The form includes fields for 'Contract' (Rental Contract) and 'RC00044'.

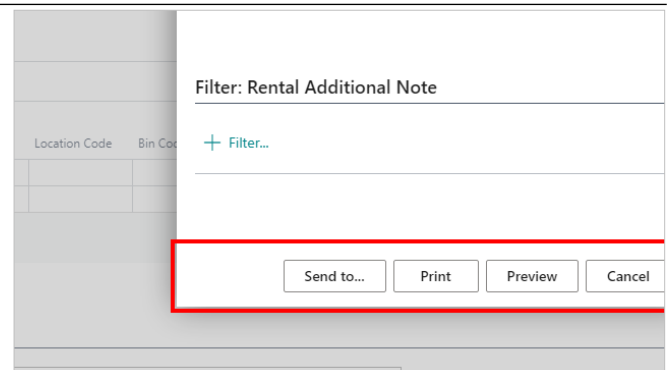
Click on a date in the calendar
The Cut-off Date is for the entry of the date for which the invoice will be posted. In this example, select the same date as the Rental Return Date on the rental line.



The screenshot shows a form with several fields and a date picker. The date picker is open, showing a calendar for August 2020. The date 8/8/2020 is selected and highlighted with a red box. The form includes fields for 'Contract' (Rental Contract) and 'RC00044'.

Click on **Send to... Print Preview Cancel**

The Proforma Invoice can be sent to PDF, Printed or Previewed.



The screenshot shows a form with several fields and a date picker. The date picker is open, showing a calendar for August 2020. The date 8/8/2020 is selected and highlighted with a red box. The form includes fields for 'Contract' (Rental Contract) and 'RC00044'.

The following picture displays the Proforma Invoice with the rental charge followed by the details of the charges for the Metered Usage per level.



CRONUS Rentals, Inc. 7122 South Ashford Street Westminster Atlanta, GA 31772		Rental Proforma Page: 1	
Rental Contract Number: RC00044		Rental Proforma Date: 8/9/2020	
Sell To:	Adatum Corporation Robert Townes 192 Market Square GA 31772	Ship To:	Adatum Corporation Robert Townes 192 Market Square GA 31772
P.O. Number		Customer ID 10000	
SalesPerson		Peter Sadow	
Ship Via		Terms 1 Month/2% 8 days	

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00023	Ford 150 Trucks Group		1		
RU00023-002	Ford 150 Trucks		1		4,200.00
Rental	Jul 10, 2020 to Aug 09, 2020		1 @ 1,200.00/Monthly Rental =	1,200.00	
Metered Usage					
Level 1	Jul 10, 2020 to Aug 09, 2020		2,000 @ 0.00/MILES =	0.00	
Level 2	Jul 10, 2020 to Aug 09, 2020		2,000 @ 1.00/MILES =	2,000.00	
Level 3	Jul 10, 2020 to Aug 09, 2020		500 @ 2.00/MILES =	1,000.00	

Amount Subject to Sales Tax USD	4,200.00	Subtotal:	4,200.00
Amount Exempt from Sales Tax USD	0.00	Total Sales Tax:	84.00
		Total USD:	4,284.00

The following demonstrates the invoicing of the contract.



Click on the field **Posting Date**
Ensure the Posting Date is set to the invoicing date.

More options

Adatum Corporation

8/9/2020

7/10/2020

8/9/2020

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00044 | WORK DATE: 8/8/2020

Rental Contract · RC00044

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/9/2020

Click on the navigation menu item **Invoice**
Alternatively Invoice and Print can be selected.

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00044 | WORK DATE: 8/8/2020

Rental Contract · RC00044

Contract Rental More options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Finalize the document by posting the amounts a

Customer Name Adatum Corporation

Posting Date 8/9/2020

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

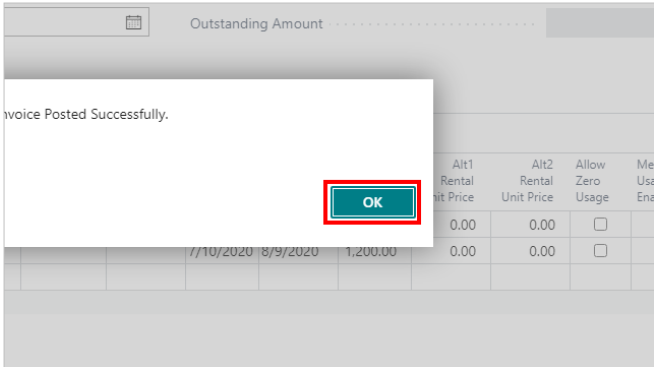
Yes No

	Alt1 Rental Unit Price	Alt2 Rental Unit Price
1 EAST	0.00	0.00
	0.00	0.00



ODT Rentals Online Help

Click on the button **OK**



The Rental Invoice can be reviewed and printed or re-printed from the contract by selecting Rental, Posted Invoices, Actions and then Print Rental.

The following demonstrates the returning of the unit.

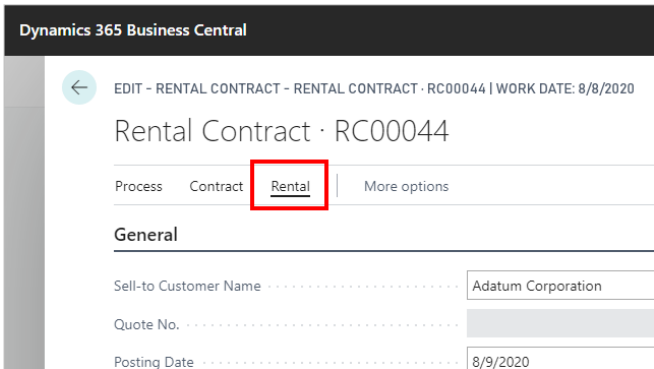
Click on the cell **Qty. to Return** with the value **0**

Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa...	Partial Return Date
0		SUPPLIES	0	0	0	0	0	<input checked="" type="checkbox"/>	
0		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	

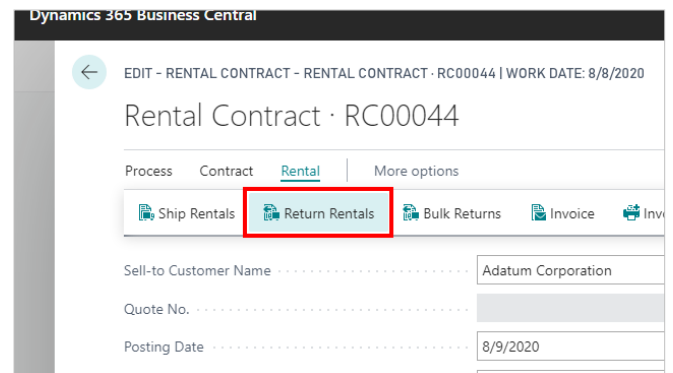
Enter the text **1**.

Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc... %	Ret... Day Billa...	Partial Return Date
0		SUPPLIES	0	0	0	0	0	<input checked="" type="checkbox"/>	
0		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	

Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00044 | WORK DATE: 8/8/2020

Rental Contract · RC00044

Process Contract Rental More options

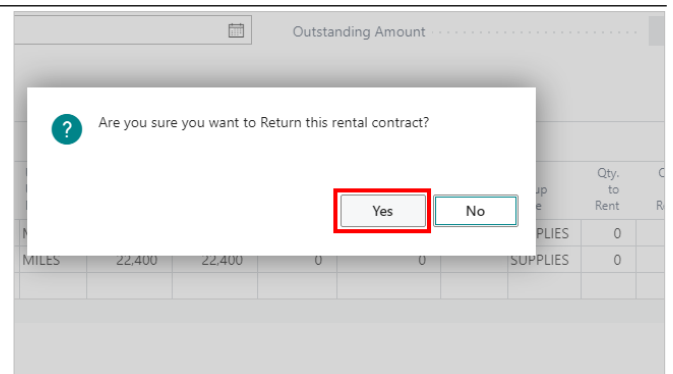
Ship Rentals **Return Rentals** Bulk Returns Invoice Invo

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 8/9/2020

Click on the button **Yes**



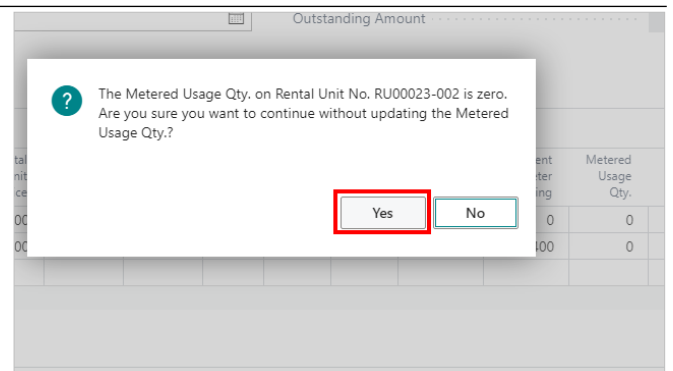
Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Click on the button **Yes**

This pop-up confirmation message is provided when returning units to allow the ability to enter additional metered usage, if needed.

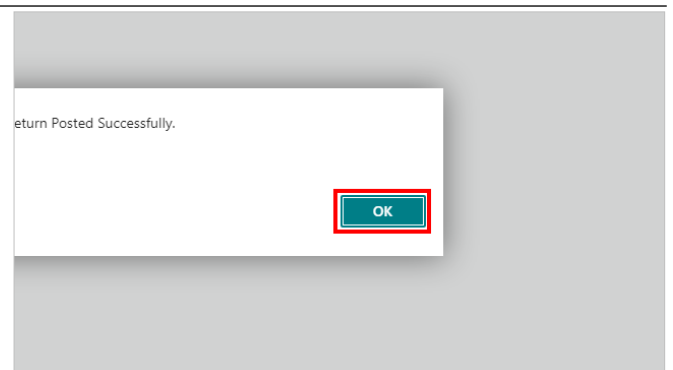


Outstanding Amount

The Metered Usage Qty. on Rental Unit No. RU00023-002 is zero. Are you sure you want to continue without updating the Metered Usage Qty.?

Yes No

Click on the button **OK**



Return Posted Successfully.

OK

4.1.12. How to Swap Rental Units with Metered Usage

4.1.12.1. Overview

When swapping a unit in a group that has metered usage pricing, there are various processing results. The results will be dependent on:

- Whether the swap is to occur at the end of a rental period or at a date within the rental period.
- Whether the metered usage reading on the unit being returned in the swap will be entered before, or after the swap function is ran.
- Whether the metered usage reading entered at the end of a rental period before swapping will be invoiced



prior to running the swap function or not.

- Whether the organization requires the metered usage revenue on the returning unit in the swap to be posted to that unit or not.

NOTES:

When the rental term on the line has an invoicing type of End or Periodic End, and swapping is to occur within a rental period, with metered usage entered on the unit that will be returned in the swap, the metered usage cannot be invoiced prior to the swap. This is due to the Billing Date on the Rental Amount Lines being for the end of the rental period.

When the rental term on the line has an invoicing type of Start or Periodic Start and swapping is to occur within a rental period with metered usage entered on the unit that will be returned in the swap, the metered usage can be invoiced prior to the swap. This is due to the Billing Date on the Rental Amount Lines being for the start of the rental period.

The following examples describe what will occur when differing terms and processes are used when swapping a unit.

Example 1:

Swapping a unit when the rental term on the line has an Invoicing Type of Periodic End. When the swap is to occur at the end of the rental period with the usage entered and the invoice for the period posted prior to the swap function being ran.

In this example, the revenue for the metered usage on the returning unit will be posted to the returning unit. The Rental Value Entry will be created on the returned unit and update the Usage Tracking Entries, Billed and Invoice No. fields.

Example 2:

Swapping a unit when the rental term on the line has an Invoicing Type of Periodic Start. When the swap is to occur at the end of the rental period with the usage entered and the invoice for the metered usage is posted using the end of period date as the posting date, prior to the swap function being ran.

In this example, the revenue for the metered usage on the returning unit will be posted to the returning unit. The Usage Tracking Entries, Billed and Invoice No. fields will be updated and the Rental Value Entry will be created on the returned unit.

Example 3:

Swapping a unit when the rental term on the line has an Invoicing Type of Periodic End. When the swap is to occur at the end of the rental period, and the usage entered on the unit to be returned will be entered prior to the swap. The invoice for the period will not be posted prior to the swap function being ran.

In this example, the Rental Amount Lines on the returning unit are transferred to the new unit. Therefore when the next invoice is posted the revenue for the metered usage on the returning unit will be posted to the Rental Value Entries on the new unit. At that time the Usage Tracking Entry on the returned unit will have the Billed and Invoice No. fields updated.

The same results will occur when the swap occurs during a rental period and when the rental term on the line has an Invoicing Type of Periodic Start or Periodic End.

4.1.12.2. Swapping Rental Units at the end of a Rental Period

The following demonstrates example 1 noted in the Overview chapter.

The contract will be for 2 months using a monthly periodic end rental term that has metered usage pricing with 3 levels of usage pricing. The first level has a zero price with a 2000 mile limit. The second level has a 1.00 per mile price for 2001 - 4000 miles. And the third level has a price of 2.00 per mile for all miles over 4000.

The metered usage on the unit will be entered at the end of the first rental period and the invoice posted prior to swapping the unit.

NOTE:



The same results occur when the rental term used is a monthly periodic start term as noted in example 2 above.

Click on the navigation menu item **Rental Contract**

Rental TermsRental UnitsRental Packages

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

+ Rental Unit

> New

> Payments

> Reports

> Se

> R

Ex

Click on the field **Sell-to Customer Name**

Contract

Rental

Actions

Navigate

Fewer options

Look up value

Click on the link in cell **No.** with the value **10000**

ProcessContractRental

Actions

Navigate

Fewer options

General

Sell-to Customer Name

Responsibility Center

Quote No.

Posting Date

Order Date

Document Date

0

10000

Adatum Corporation

31

20000

Select record "10000"

61

30000

School of Fine Art

37

40000

Alpine Ski House

31

50000

Relecloud

31

+ New

Click on the cell **Rental Unit No.**

Document Date

4/8/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.

Standard Text Code

Description

Look up value

Sales Lines

Manage

More options



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Document Date4/8/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.

Standard Text Code

Description

→

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00023**

Sales Lines

Manage

More options

Type

No.

Description

→

RU00021-0...

Vibrator Plate for Mini Excavato

RU00021-0...

Vibrator Plate for Mini Excavato

RU00021-0...

Vibrator Plate for Mini Excavato

RU00022

Wacker Skid Steer Group

RU00022-0...

Wacker Skid Steer

RU00022-0...

Wacker Skid Steer

RU00023

Ford 150 Trucks Group

RU00023-0...

Ford 150 Trucks

RU00023-0...

Ford 150 Trucks

Click on the cell **Rental Quantity** with the value **0**

4/8/2019

Functions

Fewer options

Description

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Ford 150 Trucks Group

MONTH-PEND

0

tions

Enter the text **1**.

4/8/2019

Functions

Fewer options

Description

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Ford 150 Trucks Group

MONTH-PEND

tions



Click on the cell **Location Code**

19						
wer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R
s Group	MONTH-PEND					4/
			Look up value			

Click on the link in cell **Code** with the value **EAST**

tions						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental St
up	MONTH-PEND	1				4/8/2019
up	MONTH-PEND	1				
			Code ↑	Name		
			→ EAST	East Warehouse		
			RE Select record "EAST"	Inventory Items Rental Res		
			WEST	West Warehouse		
			+ New			
	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line

Click on the cell **Rental Return Date** with the value **5/7/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
✓			4/8/2019	5/7/2019	1,200.00	0.00	
			4/8/2019	5/7/2019	Type the date in the format M/d/yyyy	0.00	

Click on the link in cell **Rental Return Date** with the value **5/7/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
			4/8/2019	5/7/2019	1,200.00	0.00	
			4/8/2019	5/7/2019	Open the date picker	0.00	



Click on the link **Next**

Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
4/8/2019	5/7/2019	1,200.00	0.00	0.00
4/8/2019			0.00	0.00

May 2019

Su Mo Tu We Th Fr Sa Next

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Click on a date in the calendar

As the contract is for 2 rental periods, select a return date 2 months out from the rental start date.

Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
4/8/2019	5/7/2019	1,200.00	0.00	0.00
4/8/2019			0.00	0.00

June 2019

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

30

Group Code Line Amount Excl. Tax Today Done Currency Code Qty. to Ship

	0.00	0.00	0		
--	------	------	---	--	--

Click on the cell **Rental Unit No.**

Document Date: 4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
→ RU00023	:	Ford 150 Trucks Group		
	:	Ford 150 Trucks Group		

Sales Lines Manage More options

Click on the link in cell **No.** with the value **RU00023-001**

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name

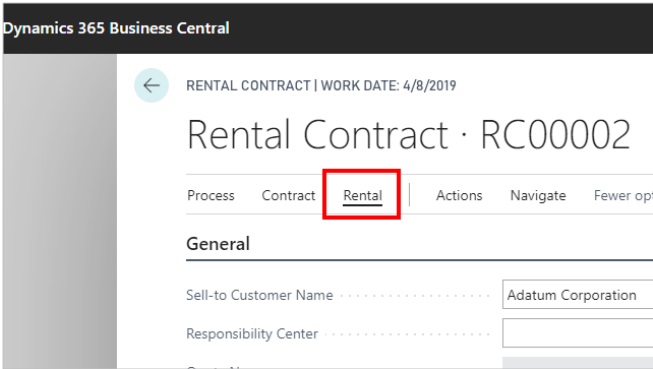
Responsibility Center

Quote No.

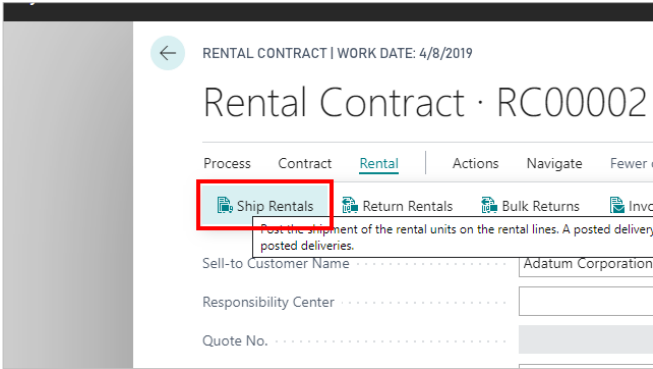
RENTAL UNIT LIST

No. ↑	Description
→ RU00023-001	Ford 150 Trucks
RU00023	Select record "RU00023-001"

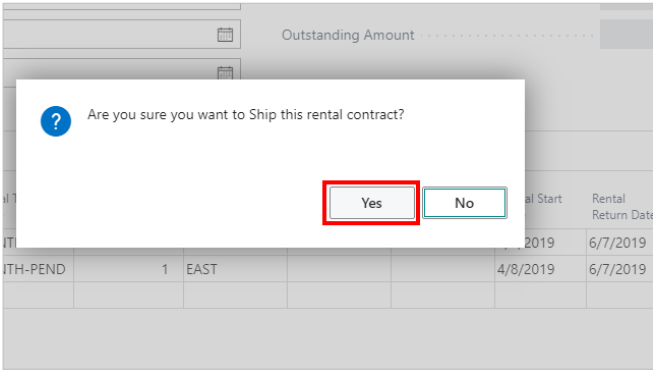
Click on the navigation menu item popup **Rental**



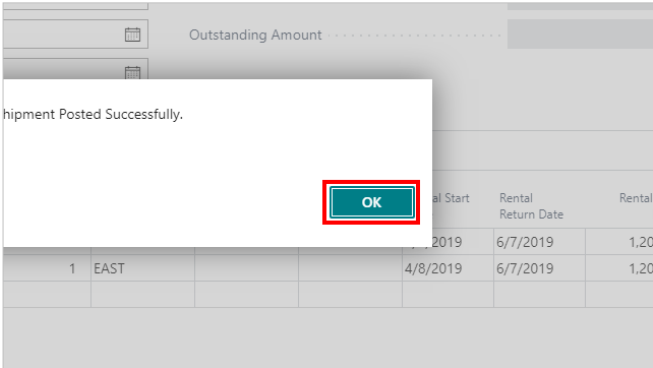
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**






Click on the button **OK**





ODT Rentals Online Help

Click on the field **Posting Date**

.....	Adatum Corporation	▼	Ext
.....		▼	Ren
.....			Dep
.....	4/8/2019		Cor
.....	4/8/2019		Out
.....	4/8/2019		

Page Line Functions Fewer options

Click on the link **Open the date picker**

<input type="text"/>	
corporation ▼	External Document No.
▼	Rental Terms Code
	Deposit Amount
	Contract Total
	Amount
	
options	

Click on the link **Next**

	<input type="text" value="Adatum Corporation"/>	<input type="button" value="v"/>	External C																																										
	<input type="text"/>	<input type="button" value="v"/>	Rental Ter																																										
	<input type="text"/>		Deposit A																																										
	<input type="text" value="4/8/2019"/>	<input type="button" value="📅"/>	Contract																																										
	<div> ◀ April 2019 ▶ 📅 </div>		Outstand																																										
			<input type="button" value="Next"/>																																										
	<table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> </thead> <tbody> <tr> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> </tr> <tr> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> </tr> <tr> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> </tr> <tr> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> </tr> <tr> <td>28</td> <td>29</td> <td>30</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Su	Mo	Tu	We	Th	Fr	Sa		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					<input type="button" value="📅"/>
Su	Mo	Tu	We	Th	Fr	Sa																																							
	1	2	3	4	5	6																																							
7	8	9	10	11	12	13																																							
14	15	16	17	18	19	20																																							
21	22	23	24	25	26	27																																							
28	29	30																																											
Line	Function																																												

Click on a date in the calendar

ility Center
 ate
 te
 t Date
 es | Manage | Line | Function
 l Unit | Standard Text Code | Description | Rental Quantity | Lo
 023
 023-001 : Ford 150 Trucks Group MONTH-PEND 1 EA
 Ford 150 Trucks MONTH-PEND 1 FA



ODT Rentals Online Help

Click on the cell **Current Meter Reading** with the value **10,525**

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10,525	10,525	0	0
	<input type="checkbox"/>	<input type="checkbox"/>				

Enter the text **14725**. Press the **Enter** key.

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10,525	10,525	0	0
	<input type="checkbox"/>	<input type="checkbox"/>				

The following demonstrates the reviewing of the Rental Usage Tracking Entry created when the Current Meter Reading was entered.

Click on the cell **Metered Usage Qty.** with the value **4,200**

et... a... a...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line
<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	10,525	14,725	4,200	
<input type="checkbox"/>	<input type="checkbox"/>				

Click on the lookup button in the cell **Metered Usage Qty.**

ow o age	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line
<input type="checkbox"/>	0	0	0	
<input type="checkbox"/>	10,525	14,725	4,200	
<input type="checkbox"/>				

Click on the cell **Entry Type** with the value **Metered Usage**

The Transaction Date is set to the Posting Date on the contract when the Current Meter Reading is entered.

When metered usage is billable to the customer the Entry Type is set to Metered Usage. Rental Amount Lines are created from the Rental Usage Tracking Entries which have the Entry Type of Metered Usage.

Click on the cell Billed

Usage Tracking Entries

Search Open in Excel

Rental Unit No. ↓	Transaction Date ↓	Entry Type	Description
RU00023-001	5/7/2019	Metered Us...	Rental Contract: RC000002
RU00023-001	4/8/2019	Adjustment	Metered Usage

Usage Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invo
4,200.00	MILES	14,725.00	<input type="checkbox"/>	

Click on the button **Close**

4,200.00	MILES	14,725.00	
----------	-------	-----------	--

Close

The following demonstrates the reviewing of the Rental Amount Lines after the entry of the metered usage for the first rental period.

Click on the navigation menu item popup **Line**

Quote No.					
Posting Date	5/7/2019				
Order Date	4/8/2019				
Document Date	5/7/2019				
Rental Lines	Manage	Line	Functions	Fewer options	
Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty	
RU00023		SUPPLIES	0		
→ RU00023-001		SUPPLIES	0		



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the sel

RU00023			SUPPLIES
→ RU00023-001	:		SUPPLIES

Click on the cell **Billing Date** with the value **5/7/2019**

Int	Currency	Amount	Tax Group	Billing Date
Tax	Code	Including Tax	Code	
.00		1,224.00	SUPPLIES	5/7/2019
.00		0.00	SUPPLIES	5/7/2019
.00		2,040.00	SUPPLIES	5/7/2019
.00		408.00	SUPPLIES	5/7/2019
.00		1,224.00	SUPPLIES	6/7/2019

After the entry of the metered usage the rental amount lines contain the rental charge line, 3 metered usage lines with the Metered Usage Qty. from the Rental Usage Tracking Entry, allocated based on the limits on the price card.
All of these records have the Billing Date of May 7.
The last line is for the rental charge for the second rental period.

Click on the button **Close**

.00	0.00	SUPPLIES	5/7/2019
.00	2,040.00	SUPPLIES	5/7/2019
.00	408.00	SUPPLIES	5/7/2019
.00	1,224.00	SUPPLIES	6/7/2019

Close

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00002

Process | Contract | **Rental** | Actions | Navigate | Fewer op

General

Sell-to Customer Name Adatum Corporation

Responsibility Center



Click on the navigation menu item **Invoice**

CONTRACT | WORK DATE: 4/8/2019

Contract · RC00002

Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns Invoice Invoice and Print Posted

Customer Name Adatum Corporation

Utility Center

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

PLIES	0	1	0	0	Met... Usa... Ena...	Allow Zero Usage
					<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Click on the button **OK**

Invoice Posted Successfully.

OK

PLIES	0	1	0	0	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading
					<input checked="" type="checkbox"/>	<input type="checkbox"/>	0
					<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.525
					<input type="checkbox"/>	<input type="checkbox"/>	

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Gr Code
RU00023	0.00	0.00		SUPP
→ RU00023-001	0.00	0.00		SUPP



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the selected

RU00023		0.00	0.00	
→ RU00023-001	:	0.00	0.00	

Click on the cell **Invoice No.** with the value **RI00002**

Amount cluding Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.
1,224.00	SUPPLIES	5/7/2019	<input checked="" type="checkbox"/>	RI00002
0.00	SUPPLIES	5/7/2019	<input checked="" type="checkbox"/>	RI00002
2,040.00	SUPPLIES	5/7/2019	<input checked="" type="checkbox"/>	RI00002
408.00	SUPPLIES	5/7/2019	<input checked="" type="checkbox"/>	RI00002
1,224.00	SUPPLIES	6/7/2019	<input type="checkbox"/>	

Click on the button **Close**

0.00	0.00	0.00	SUPPLIES
1.00	2,000.00	2,040.00	SUPPLIES
2.00	400.00	408.00	SUPPLIES
00.00	1,200.00	1,224.00	SUPPLIES

Close

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Gr Code
RU00023	0.00	0.00		SUPP
→ RU00023-001	:	0.00	0.00	SUPP



ODT Rentals Online Help

Click on the navigation menu item **Rental Usage Tracking Entries**

5/7/2019 Contract Tot
4/8/2019 Outstanding
5/7/2019

Line Functions Fewer options

Rental Ledger Entries Rental Value Entries **Rental Usage Tracking Entries** Additions

View the usage tracking entries

0.00	0.00		SUPPLIES	0	0
0.00	0.00		SUPPLIES	0	1

Click on the cell **Invoice No.** with the value **RI00002**

Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.	Entry No.
200.00	MILES	14,725.00	<input checked="" type="checkbox"/>	RI00002	4
525.00	MILES	10,525.00	<input type="checkbox"/>	RI00002	1

Click on the back button

Dynamics 365 Business Central

RU00023-001 · FORD 150 TRUCKS | WORK DATE: 4/8/2019

Usage Tracking Entries

Search Open in Excel

Rental Unit No.	Transaction Date	Entry Type	Description
RU00023-001	5/7/2019	Metered Us...	Rental Contract: R
RU00023-001	4/8/2019	Adjustment	Initial Reading

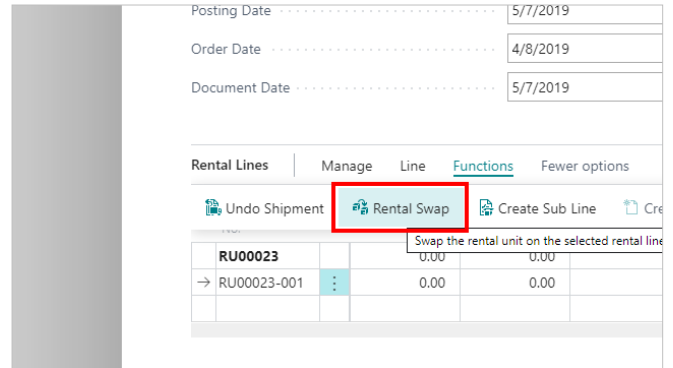
Click on the navigation menu item popup **Functions**

Quote No.
Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines Manage Line **Functions** Fewer options

Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code
RU00023	0.00	0.00		SUPPLIES
→ RU00023-001	0.00	0.00		SUPPLIES

Click on the navigation menu item **Rental Swap**



Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

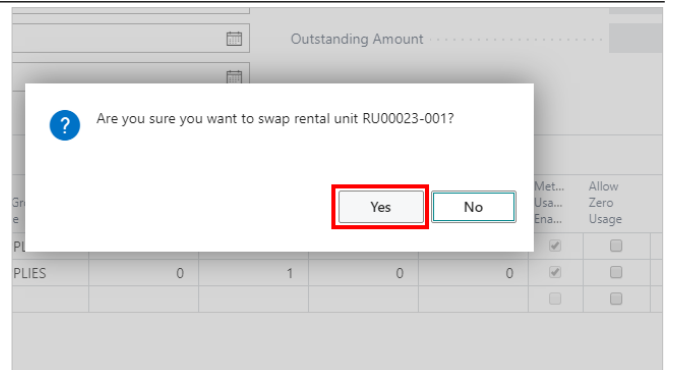
Rental Lines | Manage | Line | **Functions** | Fewer options

Undo Shipment **Rental Swap** Create Sub Line

Swap the rental unit on the selected rental line

Rental Unit	Quantity	Unit Price	Total Price
RU00023	0.00	0.00	0.00
→ RU00023-001	0.00	0.00	0.00

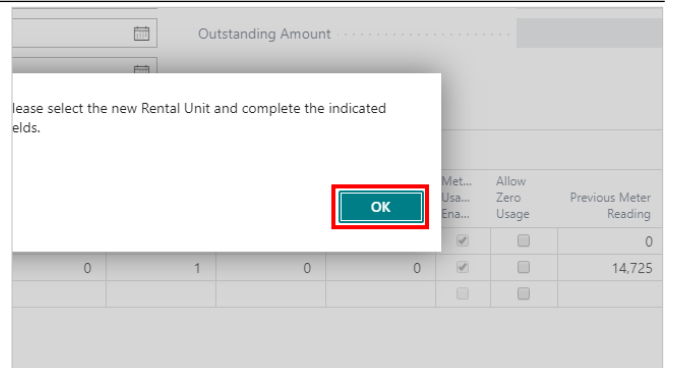
Click on the button **Yes**



Are you sure you want to swap rental unit RU00023-001?

Yes No

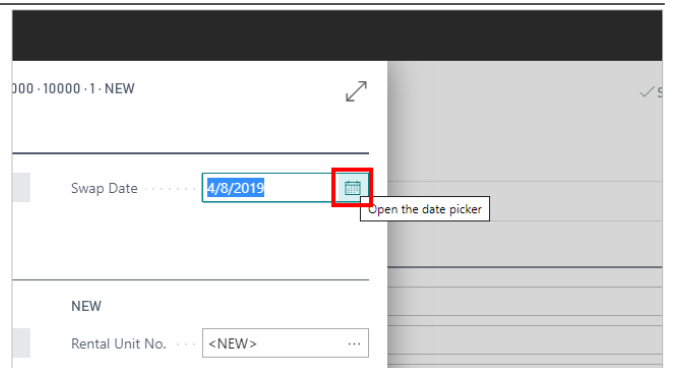
Click on the button **OK**



Please select the new Rental Unit and complete the indicated fields.

OK

Click on the link **Open the date picker**



000 - 10000 - 1 - NEW

Swap Date 4/8/2019 **Open the date picker**

NEW

Rental Unit No. ... <NEW> ...



Click on the link **Next**

0-1-NEW

Swap Date 4/8/2019

NEW

Rental Unit No. ...

✓ SAVED

Click on a date in the calendar

Swap Date 4/8/2019

NEW

1 Rental Unit No. ...

OK Cancel

Click on the field **Rental Unit No.**

C00002 Swap Date 5/7/2019

NEW

U00023-001 Rental Unit No. ... <NEW>

Look up value

OK Cancel

Click on the lookup button **Rental Unit No.**

Swap Date 5/7/2019

NEW

Rental Unit No. ... <NEW>

OK Cancel



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00023-002**

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name
Responsibility Center
Quote No.

RENTAL UNIT LIST

Search + New Edit List Delete

No. ↑	Description
RU00023-002	Ford 150 Trucks

Select record "RU00023-002"

Click on the button **OK**

NEW

RU00023-001 Rental Unit No. RU00023-002

OK Cancel

The following demonstrates the review of the Rental Amount Lines and Rental Usage Tracking Entries after the swap function was ran.

Click on the cell **Rental Unit No.** with the value **RU00023-001**

Select the rental unit which was returned.

Document Date 5/17/2019

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description
RU00023		Ford 150 Trucks Group
RU00023-001		Ford 150 Trucks
RU00023-002		Ford 150 Trucks

Sales Lines Manage More options

Click on the navigation menu item popup **Line**

Quote No.
Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
RU00023-001		Ford 150 Trucks	MONT
RU00023-002		Ford 150 Trucks	MONT



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the s

RU00023		Ford 150 Trucks Group
→ RU00023-001	:	Ford 150 Trucks
RU00023-002		Ford 150 Trucks

Click on the cell **Invoice No.** with the value **RI00002**

Notice that the Billed field is flagged and the Invoice No. field populated, indicating that the usage has been invoiced.

Also notice the rental charge line for the second rental period is no longer in the lines.

This is due to the return date on the line is at the end of the first rental period.

Amount Tax Group Billing Date Billed Invoice No.

1,224.00	SUPPLIES	5/7/2019	✓	RI00002
0.00	SUPPLIES	5/7/2019	✓	RI00002
2,040.00	SUPPLIES	5/7/2019	✓	RI00002
408.00	SUPPLIES	5/7/2019	✓	RI00002

Click on the button **Close**

UPPLIES	5/7/2019	✓	RI00002
UPPLIES	5/7/2019	✓	RI00002
UPPLIES	5/7/2019	✓	RI00002
UPPLIES	5/7/2019	✓	RI00002

Close

Click on the navigation menu item popup **Line**

Quote No.
Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
→ RU00023-001	:	Ford 150 Trucks	MONT
RU00023-002		Ford 150 Trucks	MONT



ODT Rentals Online Help

Click on the navigation menu item **Rental Usage Tracking Entries**

5/7/2019	Contract Tot
4/8/2019	Outstanding
5/7/2019	

Line	Functions	Fewer options
Rental Ledger Entries	Rental Value Entries	Rental Usage Tracking Entries

Ford 150 Trucks Group	MONTH-PEND	1	EAST
Ford 150 Trucks	MONTH-PEND	1	EAST
Ford 150 Trucks	MONTH-PEND	1	EAST

Click on the cell **Invoice No.** with the value **RI00002**

The Billed field is flagged and the Invoice No. populated on the Metered Usage Type entry, which indicates that the usage has been invoiced.

Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.	Entry No.
200.00	MILES	14,725.00	<input checked="" type="checkbox"/>	RI00002	4
525.00	MILES	10,525.00	<input type="checkbox"/>		1

Click on the back button

Dynamics 365 Business Central			
RU00023-001 · FORD 150 TRUCKS | WORK DATE: 5/7/2019			
Usage Tracking Entries			
Search Open in Excel			
Rental Unit No.	Transaction Date	Entry Type	Description
RU00023-001	5/7/2019	Metered Us...	Rental Contract: R
RU00023-001	4/8/2019	Adjustment	Initial Reading

Click on the cell **Rental Unit No.** with the value **RU00023-002**

Select the rental line with the unit that was shipped out in the swap.

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00023		Ford 150 Trucks Group		
→ RU00023-001		Ford 150 Trucks		
RU00023-002		Ford 150 Trucks		

Sales Lines	Manage	More options
-------------	--------	--------------

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
RU00023-001		Ford 150 Trucks	MONT
→ RU00023-002		Ford 150 Trucks	MONT

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the:

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
RU00023-001		Ford 150 Trucks	MONT
→ RU00023-002		Ford 150 Trucks	MONT

Click on the cell **Starting Date-Time** with the value **5/8/2019 12:00 AM**

Note that the rental charge line is for the second rental period on the unit shipped out during the swap.

TRACT | WORK DATE: 5/7/2019

Search | Open in Excel

VIEW - RENTAL LINE RENTAL AMOUNTS

Type	Starting Date-Time	Ending Date-Time	Ext	Qua
Rental	5/8/2019 12:00 AM	6/7/2019 11:59 PM		
	5/8/2019 12:00 AM			

Click on the button **Close**

1,224.00 SUPPLIES 6/7/2019

Close

4.1.12.3. Swapping Rental Units within a Rental Period

The following demonstrates example 4 noted in the Overview chapter.

The contract will be for 3 months using a monthly periodic end rental term that has metered usage pricing with 3 levels of usage pricing. The first level has a zero price with a 2000 mile limit. The second level has a 1.00 per mile price for 2001 - 4000 miles. And the third level has a price of 2.00 per mile for all miles over 4000.

The metered usage on the unit will be entered at the end of the first rental period and the invoice posted. Then midway into the second rental period the metered usage will be entered and then the swap function will be ran.



Click on the navigation menu item **Rental Contract**

[Rental Terms](#) [Rental Units](#) [Rental Packages](#)

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

+ Rental Unit

> New

> Payments

> Reports

> Se

> R

E

Create a new rental contract for rental p

Click on the field **Sell-to Customer Name**

Contract

Rental | Actions | Navigate | Fewer options

Look up value

Ext

Ren

Dep

Cor

Out

Click on the link in cell **No.** with the value **10000**

Process | Contract | Rental | Actions | Navigate | Fewer options

General

Sell-to Customer Name

Responsibility Center

Note No. → 10000 Adatum Corporation 31

Posting Date 200 Select record "10000" Arch 61

Order Date 30000 School of Fine Art 37

Document Date 40000 Alpine Ski House 31

50000 Relecloud 31

+ New

Click on the cell **Rental Unit No.**

Document Date 6/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No. →

Standard Text Code

Description

Look up value

Sales Lines | Manage | More options



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Document Date6/7/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.

Standard Text Code

Description

→

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00023**

Sales Lines

Manage

More options

Type

No.

Description

→

RU00021-0...

Vibrator Plate for Mini Excavato

RU00021-0...

Vibrator Plate for Mini Excavato

RU00021-0...

Vibrator Plate for Mini Excavato

RU00022

Wacker Skid Steer Group

RU00022-0...

Wacker Skid Steer

RU00022-0...

Wacker Skid Steer

RU00023

Ford 150 Trucks Group

RU00023-0...

Ford 150 Trucks

RU00023-0...

Ford 150 Trucks

RU00023-0...

Ford 150 Trucks

Click on the cell **Rental Quantity** with the value **0**

6/7/2019

Functions

Fewer options

Description

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Ford 150 Trucks Group

MONTH-PEND

0

tions

Enter the text **1**.

6/7/2019

Functions

Fewer options

Description

Rental Terms Code

Rental Quantity

Location Code

Rental Terms Code Alt1

Ford 150 Trucks Group

MONTH-PEND

tions



Click on the cell **Location Code**

19						
wer options						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R
Group	MONTH-PEND					6/
			Look up value			

Click on the link in cell **Code** with the value **EAST**

tions						
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
up	MONTH-PEND	1				6/7/2019
up	MONTH-PEND	1				
			Code ↑	Name		
			→ EAST	East Warehouse		
			REN Select record "EAST"	Inventory Items Rental Res		
			WEST	West Warehouse		
			+ New			
	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line

Click on the cell **Rental Return Date** with the value **7/6/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
✓			6/7/2019	7/6/2019	1,200.00	0.00	
			6/7/2019	7/6/2019	Type the date in the format M/d/yyyy	0.00	

Click on the link in cell **Rental Return Date** with the value **7/6/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
			6/7/2019	7/6/2019	1,200.00	0.00	
			6/7/2019	7/6/2019	Open the date picker	0.00	



Click on the link **Next**

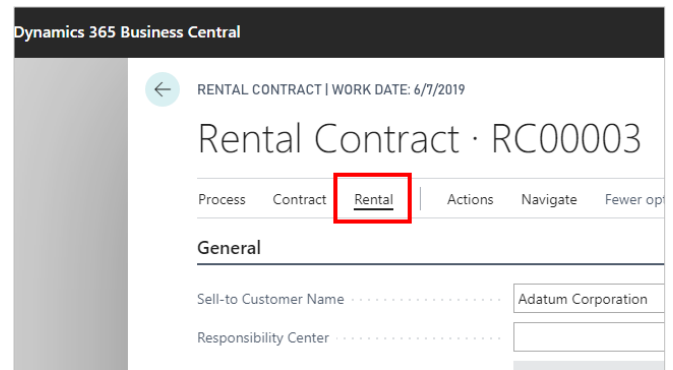
Click on a date in the calendar

As the contract is for 2 rental periods, select a return date 2 months out from the rental start date.

Click on the cell **Rental Unit No.**

Click on the link in cell **No.** with the value **RU00023-001**

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/7/2019

Rental Contract · RC000003

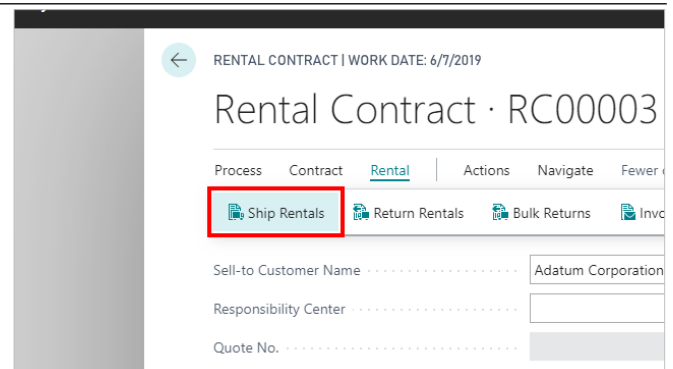
Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Ship Rentals**



← RENTAL CONTRACT | WORK DATE: 6/7/2019

Rental Contract · RC000003

Process Contract Rental Actions Navigate Fewer options

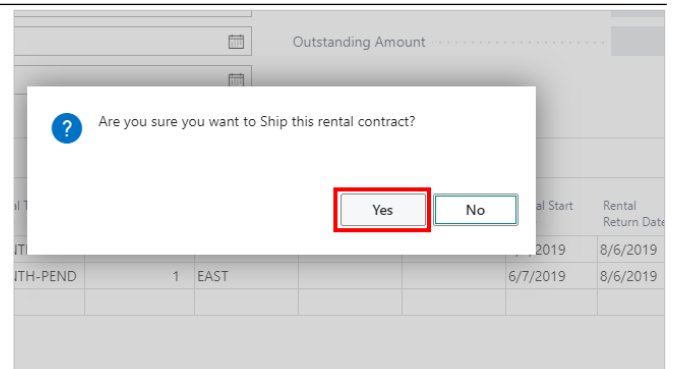
Ship Rentals Return Rentals Bulk Returns Invoice

Sell-to Customer Name Adatum Corporation

Responsibility Center

Quote No.

Click on the button **Yes**



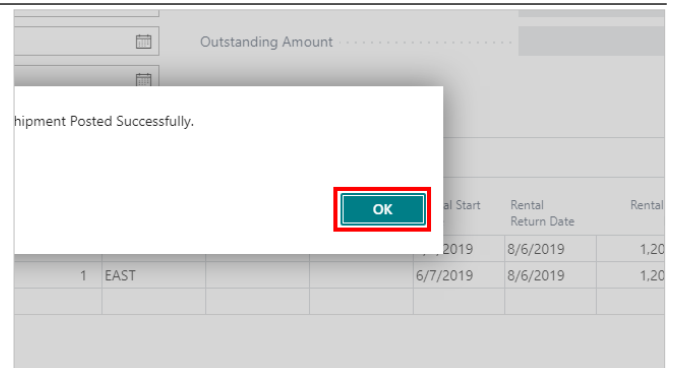
Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

Item No.	Description	Unit	Quantity	Unit Price	Total Price	Rental Start	Rental Return Date
1	EAST		1			6/7/2019	8/6/2019

Click on the button **OK**



Shipment Posted Successfully.

OK

Item No.	Description	Unit	Quantity	Unit Price	Total Price	Rental Start	Rental Return Date	Rental Amount
1	EAST		1			6/7/2019	8/6/2019	1.20






When entering the Current Meter Reading, the Posting Date is to be set to the date that the metered reading was taken. This date is used as the Transaction Date on the Usage Tracking Entry and is used in the creation of the Rental Amount Lines for determining the date fields and to allocate the usage based on the allowance limits set on the rental price card.

ODT Rentals Online Help

Click on the field **Posting Date**

The screenshot shows the 'New' button dropdown menu in Microsoft Excel. The 'Date' option is highlighted with a red rectangle. The date '6/7/2019' is entered in the adjacent field, which also has a red rectangle around it. A tooltip for the date field says 'Type the date in the format M/d/yyyy'.

Click on the link **Open the date picker**

<input type="text"/>	
orporation 	External Document No.
<input type="text"/> 	Rental Terms Code
<input type="text"/>	Deposit Amount
<input type="text"/> 	Contract Total
<input type="text"/> 	Open the date picker amount
<input type="text"/> 	
options	

Click on the link **Next**

Adatum Corporation	External C																																																	
	Rental Ter																																																	
	Deposit A																																																	
6/7/2019	Contract																																																	
<div> <div>June 2019</div> <div> <div>◀</div> <div>▶</div> </div> <table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>1</td> </tr> <tr> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> </tr> <tr> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> </tr> <tr> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> </tr> <tr> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> </tr> <tr> <td>30</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </div>	Su	Mo	Tu	We	Th	Fr	Sa							1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30							Outstand
Su	Mo	Tu	We	Th	Fr	Sa																																												
						1																																												
2	3	4	5	6	7	8																																												
9	10	11	12	13	14	15																																												
16	17	18	19	20	21	22																																												
23	24	25	26	27	28	29																																												
30																																																		

Click on a date in the calendar

<input type="text" value="6/7/2019"/>		<input type="button" value="▼"/>	Rental Term
<input type="button" value="6/7/2019"/>		<input type="button" value="6/7/2019"/>	Deposit
<input type="button" value="6/7/2019"/>		<input type="button" value="6/7/2019"/>	Contract
<input type="button" value="6/7/2019"/>		<input type="button" value="6/7/2019"/>	Outstanding



Click on **Rental Unit No. = RU00023-001**, **Rental Terms Code = MONTH-PEND**, **Rental Quantity = 1**

Document Date 8/17/2019

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00023		Ford 150 Trucks Group		
→ RU00023-001		Ford 150 Trucks		

Sales Lines Manage More options

Click on the cell **Current Meter Reading** with the value **14,725**

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	14,725	14,725	0	0

Enter the text **18500**. Press the **Enter** key.

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	14,725		0	0

The Rental Usage Tracking Entry created can be viewed by using the following steps.

Click on the lookup button in the cell **Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %	Ret... Day Billa...	Partial Return Date
0	0	0	0	<input checked="" type="checkbox"/>	
14,725	18,500	3,775	0	<input checked="" type="checkbox"/>	



Click on the cell **Usage Quantity** with the value **3,775.00**

Description	Customer Name	Usage Quantity	Usage Unit of Measure	Current Meter Reading
0023-001 - FORD 150 TRUCKS	Adatum Corporation	3,775.00	MILES	18,500.00

Click on the button **Close**

Close

The Rental Amount Lines created for the Metered Usage can be viewed by using the following steps.

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 7/6/2019

Order Date 6/7/2019

Document Date 7/6/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty.
RU00023		SUPPLIES	0	
→ RU00023-001	:	SUPPLIES	0	

Click on the navigation menu item **Rental Amount Lines**

Posting Date	7/6/2019
Order Date	6/7/2019
Document Date	7/6/2019
Rental Lines | Manage | Line | Functions | Fewer options	
Rental Amount Lines | Rental Ledger Entries | Rental Va	
View the rental amount line records that will be billed for th	
RU00023	SUPPLIES
→ RU00023-001	SUPPLIES



Click on the cell **Type** with the value **Rental**

RENTAL CONTRACT | WORK DATE: 6/7/2019

Rental Contract ·

VIEW - RENTAL LINE RENTAL AMOUNTS

Process	Contract	Rental	Action	Type ↑	Starting Date-Time ↑	Ending Date-Time ↑
General						
Sell-to Customer Name						
Responsibility Center						
Quote No.						

VIEW - RENTAL LINE RENTAL AMOUNTS

Type	Starting Date-Time	Ending Date-Time
Rental	6/7/2019 12:00 AM	7/6/2019 12:00 AM
Metered Us...	6/7/2019 12:00 AM	7/6/2019 12:00 AM
Metered Us...	6/7/2019 12:00 AM	7/6/2019 12:00 AM
Rental	7/7/2019 12:00 AM	8/6/2019 12:00 AM

Click on the button **Close**

00.00 1,200.00 1,224.00 SUPPLIES

0.00 0.00 0.00 SUPPLIES

1.00 1,775.00 1,810.50 SUPPLIES

00.00 1,200.00 1,224.00 SUPPLIES

Close

The following demonstrates the invoicing of the first rental period.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 6/7/2019

Rental Contract · RC00003

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Invoice**

RENTAL CONTRACT | WORK DATE: 6/7/2019

Rental Contract · RC00003

Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Finalize the document by posting the amounts.

Customer Name Adatum Corporation

Responsibility Center



ODT Rentals Online Help

Click on the button **Yes**

Are you sure you want to Invoice this rental contract?

Yes No

Click on the button **OK**

Invoice Posted Successfully.

OK

The following demonstrated the entry of the meter reading on the unit that will be returned when running the swap function.

When entering the Current Meter Reading, the Posting Date is to be set to the date that the metered reading was taken. This date is used as the Transaction Date on the Usage Tracking Entry and is used in the creation of the Rental Amount Lines for determining the date fields and to allocate the usage based on the allowance limits set on the rental price card.

Click on the field **Posting Date**

Adatum Corporation

7/6/2019

6/7/2019

7/6/2019

type the date in the format M/d/yyyy



Click on the link **Open the date picker**

orporation	External Document No.
	Rental Terms Code
	Deposit Amount
	Contract Total
	Open the date picker
	amount
options	

Click on a date in the calendar

7/6/2019	Deposit
	Contract
	Outstand
July 2019	
Su Mo Tu We Th Fr Sa	
1 2 3 4 5 6	
7 8 9 10 11 12 13	
14 15 16 17 18 19 20	
21 22 23 24 25 26 27	
28 29 30 31	
Today Done	
Line	Function
Standard Text	Description
	Rental Quantity
	Location Code
	Rental Code A
	Ford 150 Trucks Group
	MONTH-PEND
	1 EAST
	Ford 150 Trucks
	MONTH-PEND
	1 EAST

Click on the cell **Current Meter Reading** with the value **18,500**

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18,500	18,500	0	0
	<input type="checkbox"/>	<input type="checkbox"/>				

Enter the text **22525**. Press the **Enter** key.

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18,500	22525	0	0
	<input type="checkbox"/>	<input type="checkbox"/>				



ODT Rentals Online Help

Click on the lookup button in the cell **Metered Usage Qty.**

Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %	Ret... Day Billa...	Partial Return Date
0	0	0	0	<input checked="" type="checkbox"/>	
18,500	22,525	4,025	0	<input checked="" type="checkbox"/>	
		<input type="button" value="Look up value"/>		<input type="checkbox"/>	

Click on the cell **Transaction Date** with the value **7/20/2019**

Contract	Rental	Action	Rental Unit No.	Transaction Date	Entry Type	Description
			RU00023-001	7/20/2019	Metered Us...	Rental Contract: RC00

Click on the cell **Usage Quantity** with the value **4,025.00**

Description	Customer Name	Usage Quantity	Usage Unit of Measure	Current Meter Reading
Contract: RC000003	Adatum Corporation	4,025.00	MILES	22,525.00

Click on the button **Close**

Adatum Corporation	4,025.00	MILES	22,525.00
--------------------	----------	-------	-----------



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote No.

Posting Date7/20/2019

Order Date6/7/2019

Document Date7/20/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty
RU00023		SUPPLIES	0	
→ RU00023-001	:	SUPPLIES	0	

Click on the navigation menu item **Rental Amount Lines**

Posting Date7/20/2019

Order Date6/7/2019

Document Date7/20/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Amount Lines

Rental Ledger Entries

Rental Va

RU00023

→ RU00023-001

:

SUPPLIES

SUPPLIES

View the rental amount line records that will be billed for the

Click on the cell **Extended Quantity** with the value **2,000**

Note that the metered usage records are on the unit to be returned in the swap.

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax
6/7/2019 12:00 AM	7/6/2019 11:59 PM	1	1,200.00	1,200.00
d Us...	6/7/2019 12:00 AM 7/6/2019 11:59 PM	2,000	0.00	0.00
d Us...	6/7/2019 12:00 AM 7/6/2019 11:59 PM	1,775	1.00	1,775.00
7/7/2019 12:00 AM	8/6/2019 11:59 PM	1	1,200.00	1,200.00
d Us... :	7/7/2019 12:00 AM 8/6/2019 11:59 PM	2,000	0.00	0.00
d Us...	7/7/2019 12:00 AM 8/6/2019 11:59 PM	2,000	2,000 1.00	2,000.00
d Us... :	7/7/2019 12:00 AM 8/6/2019 11:59 PM	25	2.00	50.00

Click on the button **Close**

00.00	1,200.00	1,224.00	SUPPLIES
0.00	0.00	0.00	SUPPLIES
1.00	2,000.00	2,040.00	SUPPLIES
2.00	50.00	51.00	SUPPLIES

Close

Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %	Ret... Day Billa...	Partial Return D
<input type="checkbox"/>	0	0	0	0	<input checked="" type="checkbox"/>	

Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 7/20/2019

Order Date 6/7/2019

Document Date 7/20/2019

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent
RU00023		SUPPLIES	0	0
→ RU00023-001	:	SUPPLIES	0	1

Click on the navigation menu item **Rental Swap**

Posting Date 7/20/2019

Order Date 6/7/2019

Document Date 7/20/2019

Rental Lines	Manage	Line	Functions	Fewer options
Undo Shipment	Rental Swap	Create Sub Line	Create	
RU00023		SUPPLIES	0	
→ RU00023-001	:	SUPPLIES	0	

Swap the rental unit on the selected rental line.

Click on the button **Yes**

Outstanding Amount

Are you sure you want to swap rental unit RU00023-001?

Yes No

Current Meter Reading

0

1 0 0 18,500 22,525

Click on the button **OK**

Outstanding Amount

Please select the new Rental Unit and complete the indicated fields.

OK

Met... Allow Zero Previous Meter Reading

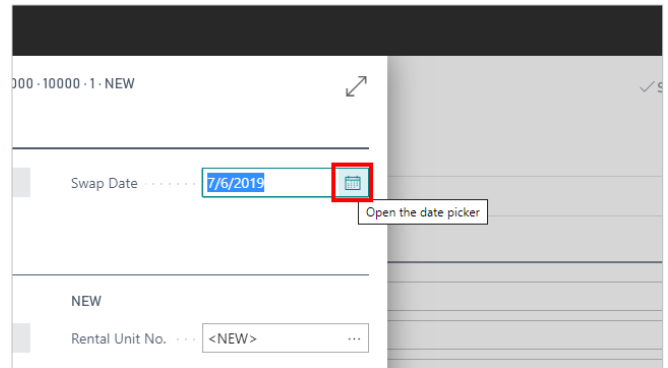
Usa... Usage

Ena...

0 1 0 0 18,500

ODT Rentals Online Help

Click on the link **Open the date picker**



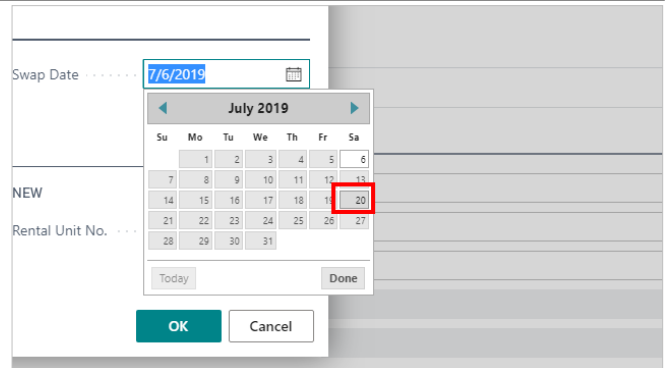
000 - 10000 - 1 - NEW

Swap Date 7/6/2019

NEW

Rental Unit No. ... <NEW> ...

Click on a date in the calendar



Swap Date 7/6/2019

NEW

Rental Unit No. ...

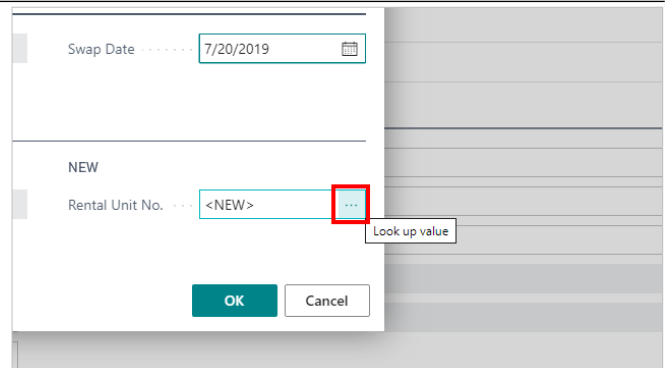
July 2019

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Today Done

OK Cancel

Click on the lookup button **Rental Unit No.**



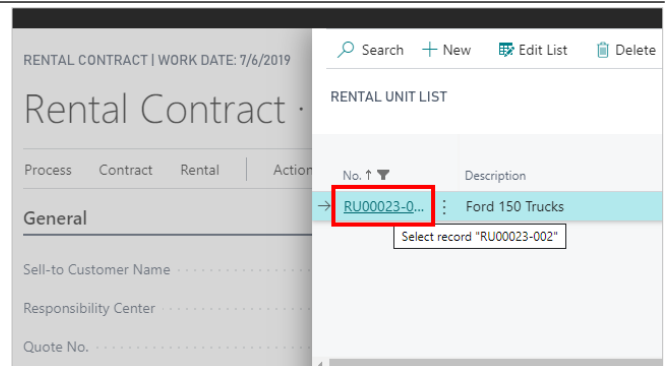
Swap Date 7/20/2019

NEW

Rental Unit No. ... <NEW> ...

OK Cancel

Click on the link in cell **No.** with the value **RU00023-002**



RENTAL CONTRACT | WORK DATE: 7/6/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name

Responsibility Center

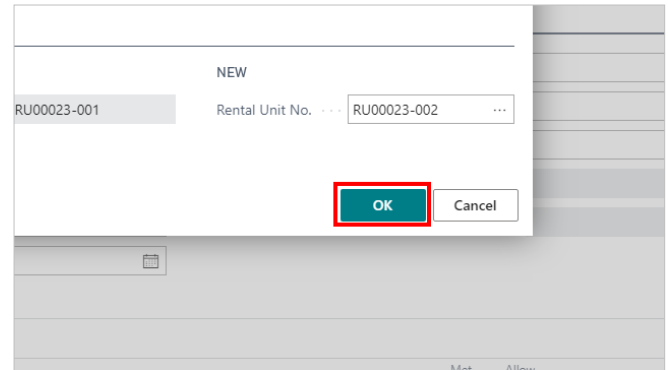
Quote No.

RENTAL UNIT LIST

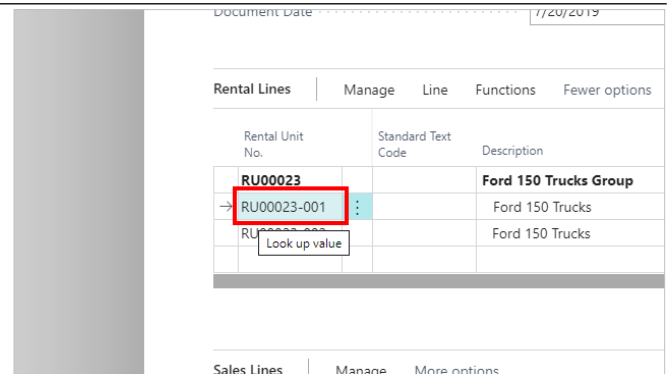
No. ↑	Description
RU00023-002	Ford 150 Trucks

Select record "RU00023-002"

Click on the button **OK**

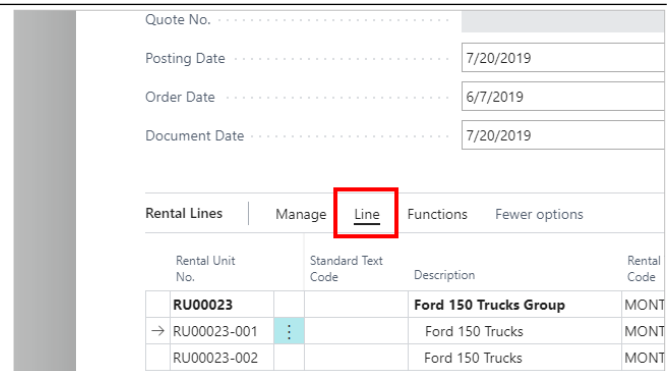


Click on the cell **Rental Unit No.** with the value **RU00023-001**



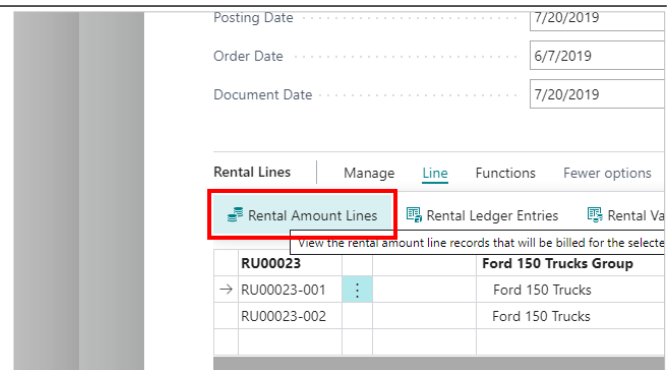
Rental Unit No.	Standard Text Code	Description
RU00023		Ford 150 Trucks Group
→ RU00023-001		Ford 150 Trucks
RU00023-002		Ford 150 Trucks

Click on the navigation menu item popup **Line**



Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
→ RU00023-001		Ford 150 Trucks	MONT
RU00023-002		Ford 150 Trucks	MONT

Click on the navigation menu item **Rental Amount Lines**



Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
→ RU00023-001		Ford 150 Trucks	MONT
RU00023-002		Ford 150 Trucks	MONT

Click on the cell **Type** with the value **Metered Usage**

Note that after the swap there are no Rental Amount Lines for the Metered Usage on the unit returned when the swap is in the middle of a period.

Rental Contract

Process

Contract

Rental

Action

General

Sell-to Customer Name

Responsibility Center

Quote No.

Posting Date

Order Date

VIEW - RENTAL LINE RENTAL AMOUNTS

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑
Rental	6/7/2019 12:00 AM	7/6/2019 12:00 AM
Metered Usage	6/7/2019 12:00 AM	7/6/2019 12:00 AM
Metered Usage	6/7/2019 12:00 AM	7/6/2019 12:00 AM

Click on the button **Close**

00.00	1,200.00	1,224.00	SUPPLIES
0.00	0.00	0.00	SUPPLIES
1.00	1,775.00	1,810.50	SUPPLIES

Close

Click on the cell **Rental Unit No.** with the value **RU00023-002**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Currency Code	Tax Group Code	Qty. to Re	
RU00023		SUPPLIES		
→ RU00023-001	:	SUPPLIES		
RU00023-002	:	SUPPLIES		
	RU00023-002			

Sales Lines	Manage	More options

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	7/20/2019
Order Date	6/7/2019
Document Date	7/20/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty
RU00023		SUPPLIES	0	
RU00023-001		SUPPLIES	0	
→ RU00023-0 ...		SUPPLIES	0	



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Posting Date 7/20/2019
Order Date 6/7/2019
Document Date 7/20/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the selected rent

RU00023		SUPPLIES
RU00023-001		SUPPLIES
→ RU00023-002		SUPPLIES

Click on the cell **Extended Quantity** with the value **2,000**

Note that there are Rental Amount Lines for the metered usage entered on the unit that was returned when running the swap function.

As noted in the example 4, the revenue will be posted to the unit which was shipped out in the swap.

Search Open in Excel

- RENTAL LINE RENTAL AMOUNTS

	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax
	7/7/2019 12:00 AM	8/6/2019 11:59 PM	1	1,200.00	1,200.00
d Us...	7/7/2019 12:00 AM	8/6/2019 11:59 PM	2,000	0.00	0.00
d Us...	7/7/2019 12:00 AM	8/6/2019 11:59 PM	2,000	1.00	2,000.00
d Us...	7/7/2019 12:00 AM	8/6/2019 11:59 PM	25	2.00	50.00

Click on the button **Close**

00.00	1,200.00	1,224.00	SUPPLIES
0.00	0.00	0.00	SUPPLIES
1.00	2,000.00	2,040.00	SUPPLIES
2.00	50.00	51.00	SUPPLIES

Close

The following demonstrates the entry of a Current Meter Reading on the unit shipped out for July 20 through August 5, the invoicing of the second rental period, and the review of the Rental Value Entries from the contract.

Click on the field **Posting Date**

Adatum Corporation

7/20/2019

6/7/2019

7/20/2019

Type the date in the format M/d/yyyy

Page | Line | Functions | Fewer options

ODT Rentals Online Help

Click on the link **Open the date picker**

corporation		External Document No.
		Rental Terms Code
		Deposit Amount
		Contract Total
		Outstanding Amount
options		

Click on the link **Next**

		<div>Adatum Corporation</div>							<div></div>	External D																																										
		<div></div>							<div></div>	Rental Ter																																										
										Deposit A																																										
		<div>7/20/2019</div>							<div></div>	Contract																																										
		<div> <div><</div> <div>July 2019</div> <div>></div> </div>							<div></div>	Outstand																																										
		<table border="1"> <thead> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> </thead> <tbody> <tr> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> </tr> <tr> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> </tr> <tr> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> </tr> <tr> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> </tr> <tr> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>							Su	Mo	Tu	We	Th	Fr	Sa		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				<div></div>	
Su	Mo	Tu	We	Th	Fr	Sa																																														
	1	2	3	4	5	6																																														
7	8	9	10	11	12	13																																														
14	15	16	17	18	19	20																																														
21	22	23	24	25	26	27																																														
28	29	30	31																																																	
Line	Function																																																			

Click on a date in the calendar

Ability Center

Date: 7/20/2019

Time Date:

August 2019

Su	Mo	Tu	We	Th	Fr	Sa
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Today Done

Unit	Standard Text Code	Description	Rental Quantity	Location
0023		Ford 150 Trucks Group	MONTH-PEND	1 EA
023-001	:	Ford 150 Trucks	MONTH-PEND	1 EA

Prior to invoicing at the end of the second rental period the Current Meter Reading is entered on the line of the unit shipped out in the swap.

Click on the cell **Current Meter Reading** with the value **8,150**

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18,500	22,525	4,025	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8,150	8,150	0	0
	<input type="checkbox"/>	<input type="checkbox"/>				



Enter the text **9700**. Press the **Enter** key.

Qty. Returned	Met... Usa... Ena...	Allow Zero Usage	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Line Discount %
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	18,500	22,525	4,025	0
0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8,150		0	0
	<input type="checkbox"/>	<input type="checkbox"/>				

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 8/6/2019

Order Date 6/7/2019

Document Date 8/6/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Currency Code	Tax Group Code	Qty. to Rent	Qty
RU00023		SUPPLIES	0	
RU00023-001		SUPPLIES	0	
→ RU00023-002		SUPPLIES	0	

Click on the navigation menu item **Rental Amount Lines**

Posting Date 8/6/2019

Order Date 6/7/2019

Document Date 8/6/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

View the rental amount line records that will be billed for the sel

RU00023		SUPPLIES	
RU00023-001		SUPPLIES	
→ RU00023-002		SUPPLIES	

Click on the cell **Extended Quantity** with the value **1,575**

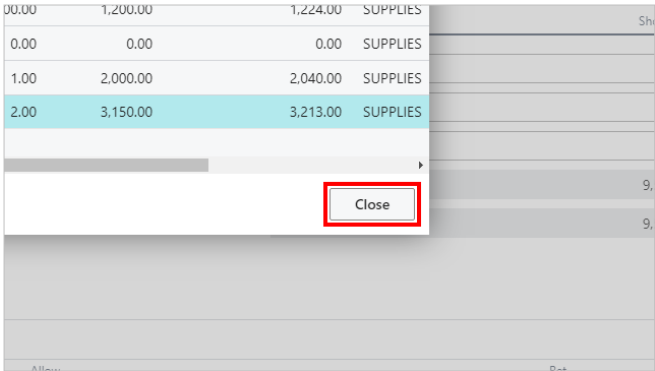
Note that the metered usage of 1,550 has been added to the usage record of 25 for the third level created for the returned unit in the swap.

Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax
7/7/2019 12:00 AM	8/6/2019 11:59 PM	1	1,200.00	1,200.00
d Us...	7/7/2019 12:00 AM 8/6/2019 11:59 PM	2,000	0.00	0.00
d Us...	7/7/2019 12:00 AM 8/6/2019 11:59 PM	2,000	1.00	2,000.00
d Us... :	7/7/2019 12:00 AM 8/6/2019 11:59 PM	1,575	2.00	3,150.00

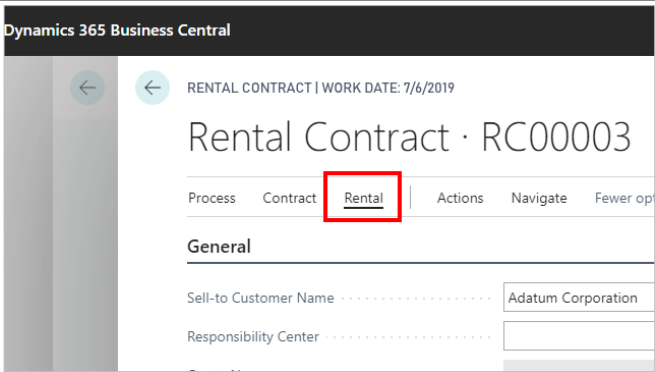


ODT Rentals Online Help

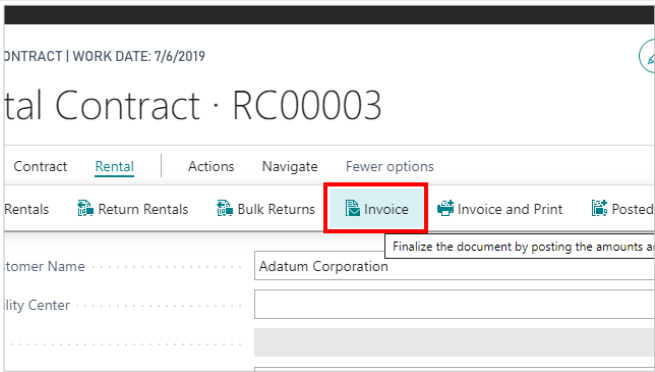
Click on the button **Close**



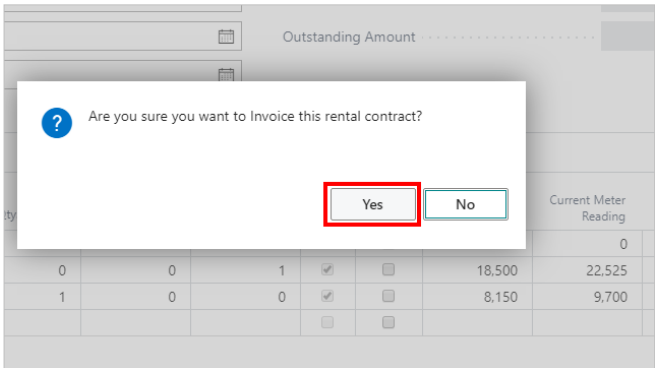
Click on the navigation menu item popup **Rental**



Click on the link **Invoice**



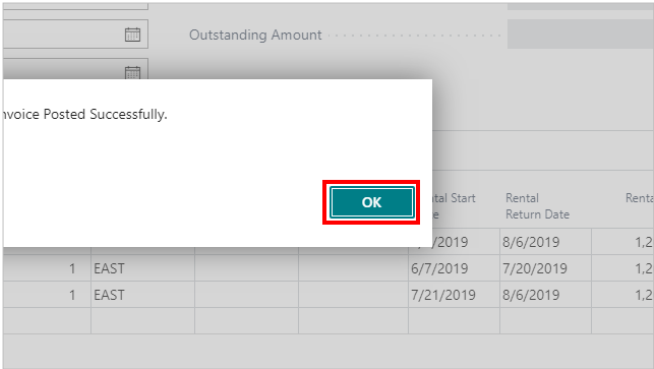
Click on the button **Yes**





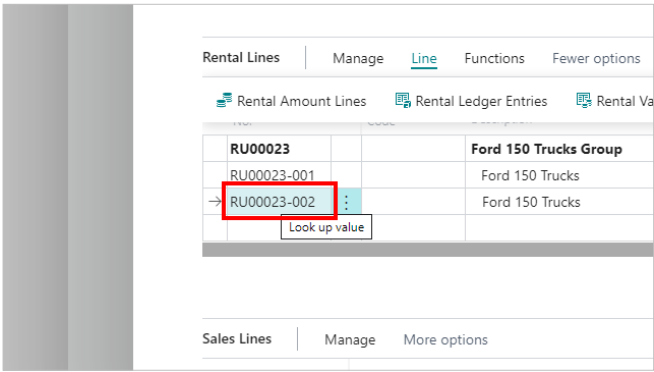
ODT Rentals Online Help

Click on the button **OK**

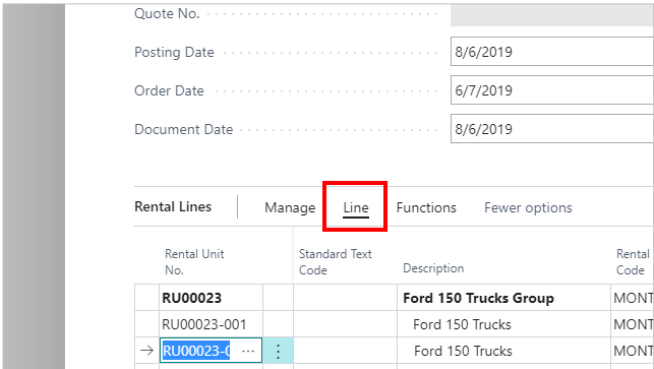


The following demonstrates the review of the Rental Value Entries on the unit which was shipped out during the swap.

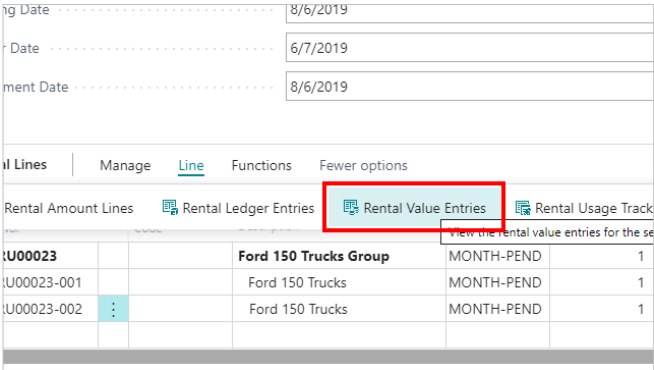
Click on the cell **Rental Unit No.** with the value **RU00023-002**



Click on the navigation menu item popup **Line**



Click on the navigation menu item **Rental Value Entries**





ODT Rentals Online Help

Click on the cell **Quantity** with the value **2,000**

Note that the Rental Value Entries contain the usage from both the returned unit and the shipped out unit. Thus the revenue has been posted to the rental unit shipped out when the swap function was ran.

voice Line No.	Cr. Memo No.	Cr. Memo Line No.	Quantity	Unit Price	Am
20500		0	1	1,200.00	1,20
20500		0	2,000	0.00	
20500		0	2,000	1.00	2,00
20500		0	1,575	2.00	3,15

Click on the button **Close**

1,200.00	1,200.00	1,224.00	13
0.00	0.00	0.00	14
1.00	2,000.00	2,040.00	15
2.00	3,150.00	3,213.00	16

Close

The following demonstrates the review of the Rental Usage Tracking Entries on the unit which was shipped out during the swap.

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	8/6/2019
Order Date	6/7/2019
Document Date	8/6/2019

Rental LinesManageLineFunctionsFewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
RU00023-001		Ford 150 Trucks	MONT
→ RU00023-002		Ford 150 Trucks	MONT

Click on the navigation menu item **Rental Usage Tracking Entries**

8/6/2019	Contract Tot
6/7/2019	Outstanding
8/6/2019	

LineFunctionsFewer options

Rental Ledger EntriesRental Value EntriesRental Usage Tracking EntriesAdditions

View the usage tracking entries for th

Ford 150 Trucks Group	MONTH-PEND	1	EAST
Ford 150 Trucks	MONTH-PEND	1	EAST
Ford 150 Trucks	MONTH-PEND	1	EAST



Click on the cell **Invoice No.** with the value **RI00005**

Note that the usage tracking entry for the unit has the Billed field flagged and the Invoice No. field populated.

Usage Tracking Entries					
Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.	Entry No.
1,550.00	MILES	9,700.00	<input checked="" type="checkbox"/>	RI00005	8
4,000.00	MILES	8,150.00	<input checked="" type="checkbox"/>	RI00003	5
4,150.00	MILES	4,150.00	<input type="checkbox"/>		2

Click on the back button

Dynamics 365 Business Central			
RU00023-002 - FORD 150 TRUCKS | WORK DATE: 7/6/2019			
Usage Tracking Entries			
Search Open in Excel			
Rental Unit No.	Transaction Date	Entry Type	Description
RU00023-002	8/6/2019	Metered Us...	Rental Contract: R
RU00023-002	6/7/2019	Metered Us...	Rental Contract: R

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	8/6/2019
Order Date	6/7/2019
Document Date	8/6/2019

Rental Lines	Manage	<u>Line</u>	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00023		Ford 150 Trucks Group	MONT
RU00023-001		Ford 150 Trucks	MONT
→ RU00023-002	⋮	Ford 150 Trucks	MONT

Click on the navigation menu item **Rental Amount Lines**

Note that the rental amount lines on the unit have the Billed field flagged and the Invoice No. field populated.

Posting Date

8/6/2019

Order Date

6/7/2019

Document Date

8/6/2019

Rental Lines

Manage

Line

Functions

Fewer options

Rental Amount Lines

Rental Ledger Entries

Rental Va

RU00023		Ford 150 Trucks Group
RU00023-001		Ford 150 Trucks
→ RU00023-002	:	Ford 150 Trucks



ODT Rentals Online Help

Click on the cell **Invoice No.** with the value **RI00005**

Note that the usage tracking entry for the unit has the Billed field flagged and the Invoice No. field populated.

Quantity	Usage Unit of Measure	Current Meter Reading	Billed	Invoice No.	Entry No.
225.00	MILES	22,525.00	<input checked="" type="checkbox"/>	RI00005	7
1,775.00	MILES	18,500.00	<input checked="" type="checkbox"/>	RI00004	6
1,200.00	MILES	14,725.00	<input checked="" type="checkbox"/>	RI00002	4
1,525.00	MILES	10,525.00	<input type="checkbox"/>		1

Click on the back button

Dynamics 365 Business Central			
RU00023-001 · FORD 150 TRUCKS | WORK DATE: 7/6/2019			
Usage Tracking Entries			
Search Open in Excel			
Rental Unit No.	Transaction Date	Entry Type	Description
RU00023-001	7/20/2019	Metered Us...	Rental Contract: R
RU00023-001	7/6/2019	Metered Us...	Rental Contract: R

The following demonstrates the return on the unit to complete the contract.

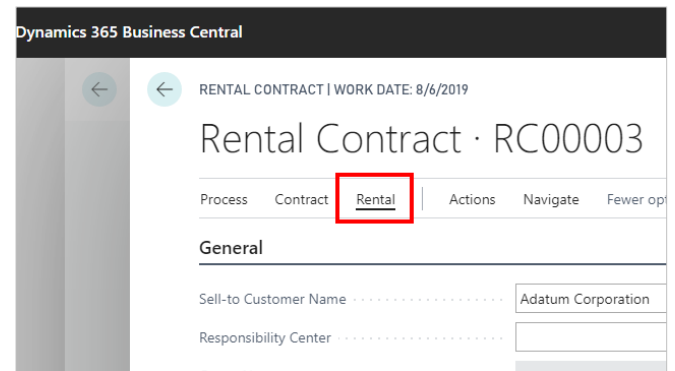
Click on the cell **Qty. to Return** with the value **0**

Functions Fewer options						
Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Met... Usa... Ena...	Allow Zero Usage
SUPPLIES	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUPPLIES	0	0	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUPPLIES	0	1	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
ons						

Enter the text 1.

Functions Fewer options						
Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Met... Usa... Ena...	Allow Zero Usage
SUPPLIES	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUPPLIES	0	0	0	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SUPPLIES	0	1	1	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
ons						

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000003

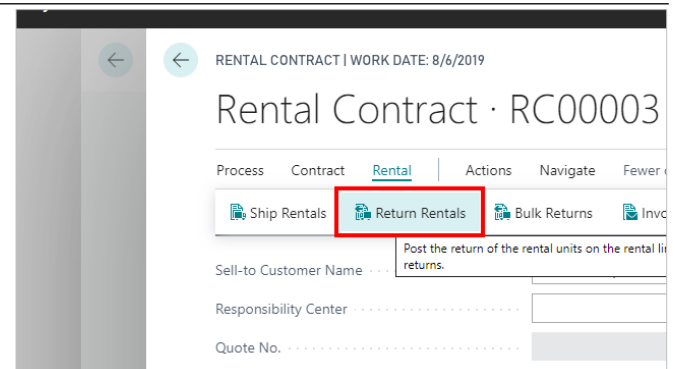
Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000003

Process Contract Rental Actions Navigate Fewer options

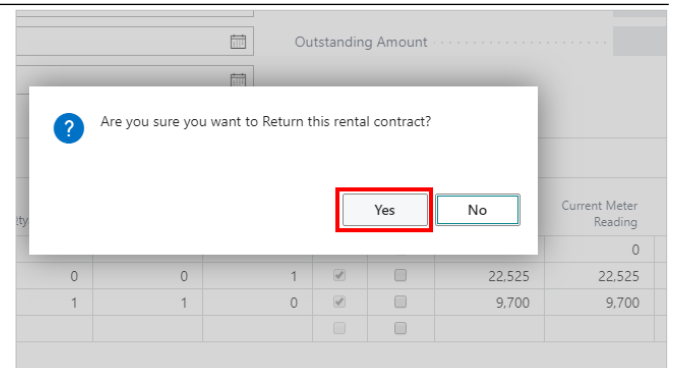
Ship Rentals **Return Rentals** Bulk Returns Invoice

Sell-to Customer Name Post the return of the rental units on the rental line returns.

Responsibility Center

Quote No.

Click on the button **Yes**



Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Qty	Unit	Location	Serial	Asset	Current Meter Reading
0	0	1	✓	□	22,525
1	1	0	✓	□	9,700

4.2. Periodic Usage and Standby Charges

4.2.1. Introduction to Periodic Usage and Standby Charge Pricing

4.2.1.1. Overview

Periodic Usage can be used for the unique circumstance where a customer is billed a daily rate, when the days to be billed are not consecutive. Another example is where the customer is billed one rate when the equipment is in use, and a standby charge, when it is not in use. Standby charges are optional.

For example, a customer might be billed for the month of March, but only for the 2nd to the 7th and the 13th to the 22nd. Optionally, the customer might be billed standby charges for some, or all of the other days during the rental period.

Equipment being billed using Periodic Usage may or may not as well have a separate rental charge for each rental period.

For example, an excavator could be sent out to a site with a base rental charge of 1,000 per month. The customer could then, as well, be billed an extra 300 per days for each day it was used, and 150 for each day it was not used during the rental period.

Rental prices can be setup to include periodic usage and standby charges. The Periodic Usage and the Standby Charge related fields can be added to the Rental Lines. The prices and applicable tax group codes default onto the Rental Lines and can be overridden.

In addition, should an organization be billing an Insurance Fee by using the Damage Waiver Percent feature on the Rental Price cards, then the Periodic Usage and Standby charges, can be included in the amount upon which the Damage Waiver is calculated.

The Periodic Usage Entries calendar is used in conjunction with the Periodic Usage and Standby Charges pricing feature. It is used to specify which days in a rental period are to be billed using the periodic usage price, and if applicable, which days are to be billed using the standby charge price.

4.2.2. Periodic Usage Set Up Overview

4.2.2.1. Overview

Setups for billing Periodic Usage and, if required, Standby Charges include:

- Configuring the applicable General Posting Setup records with a G/L Account for Periodic Usage revenue, and if applicable, a G/L Account Standby Charges.
- Configuring a Calendar for specifying days in use and days on standby for billing customers, and assigning the calendar on Rental Management Setup.
- Defining the labels to print for Periodic Usage and Standby Charges on the rental documents.
- Configuring the Rental Unit cards for Periodic Usage.
- Setting up Rental Price cards on Rental Units, and or groups, for Periodic Usage, and if applicable, Standby Charges.
- Adding Periodic Usage and Standby Charge related fields to the Rental Lines on the Rental Contract, and if applicable, the Rental Quote.

NOTE

The setup of Rental Price cards is optional. The Periodic Usage and Standby pricing can be configured on the Rental Lines, when the Rental Unit card has the field, Periodic Usage Enabled, activated.

NOTE

Should an organization want to charge a Damage Waiver based on a percentage and include the Periodic Usage and Standby Charges in the amount that the Damage Waiver is calculated on, then the Damage Waiver pricing on the price cards will need to be configured.

NOTE

The Rental Accrual and Deferral feature, when used with Periodic Usage and Standby Charges, requires additional setup on Rental Management Setup.

To learn about Rental Accruals and Deferrals, see ODT Rental Online Help, Additional Rental Processes, then Rental Accruals and Deferrals.

4.2.3. How to Set Up Rental Management Setup for Periodic Usage

4.2.3.1. Overview

On Rental Management Setup, Documents tab, an organization has the option to specify whether Periodic Usage and Standby Charge prices are to print on rental documents, and define the labels to print on rental documents.

On the General tab, the field, Rental Calendar, is mandatory for Periodic Usage and Standby Charge pricing.

4.2.3.2. How to Set Up a Rental Calendar for Periodic Usage

The Rental Periodic Usage Calendar is used in conjunction with the Periodic Usage and Standby Charges pricing feature.

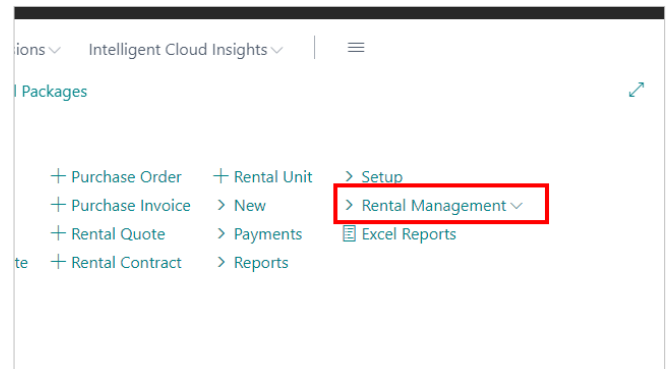
The setup and selection of a Rental Calendar on Rental Management Setup is mandatory for Periodic Usage and Standby Charge pricing.

Once the Rental Calendar has been specified on Rental Management Setup, then the Rental Periodic Usage Calendar can be accessed from the Rental Lines, Function menu on the Rental Contract.

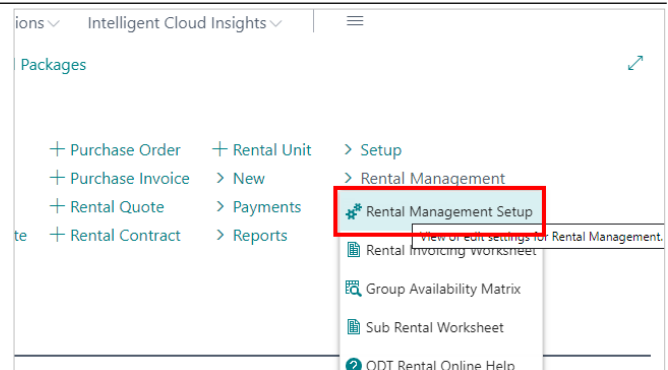
It is used to specify which days in a rental period are to be billed using the periodic usage price, and if applicable, which days are to be billed using the standby charge price.

The following demonstrates the setup of a Rental calendar from the Rental Management Setup. The setup of a new calendar can as well be done by searching for Base Calendars, and then create the calendar as noted below.

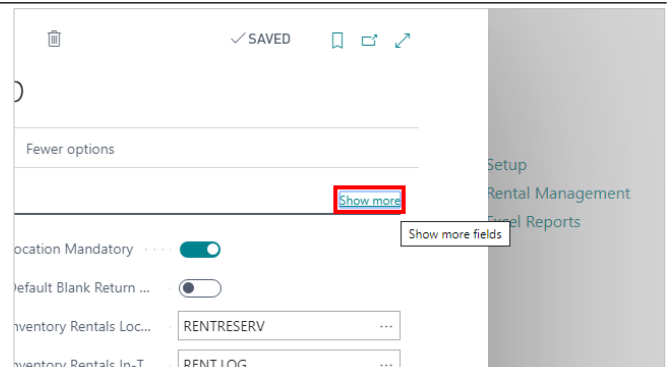
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**



Click on the button **Show more**





Click on the field **Default Rental Calendar Code**

The screenshot shows a configuration page for ODT Rentals. The 'Default Rental Calendar Code' field is highlighted with a red box. Other fields include 'Location Mandatory' (toggle), 'Default Blank Return' (toggle), 'Inventory Rentals Loc...' (dropdown), 'Inventory Rentals In-T...' (dropdown), 'Rental Return Nos.' (dropdown), and 'Rental Unit Nos.' (dropdown). A 'Look up value' button is visible next to the highlighted field.

Click on the lookup button **Default Rental Calendar Code**

The screenshot shows the same configuration page as before. The 'Look up value' button is highlighted with a red box. The 'Default Rental Calendar Code' field is still highlighted with a red box.

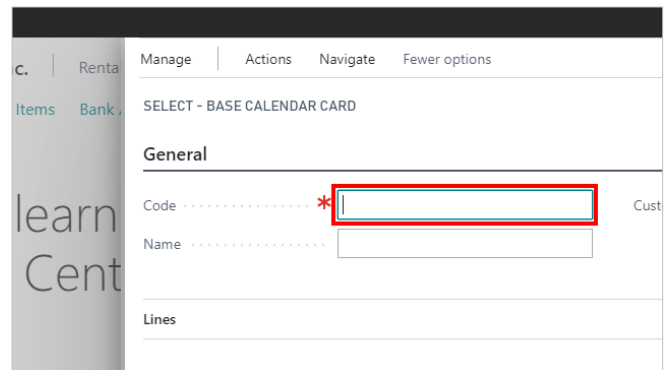
Click on the link **New**

The screenshot shows the same configuration page as before. The 'New' link is highlighted with a red box. The 'Default Rental Calendar Code' field is still highlighted with a red box.

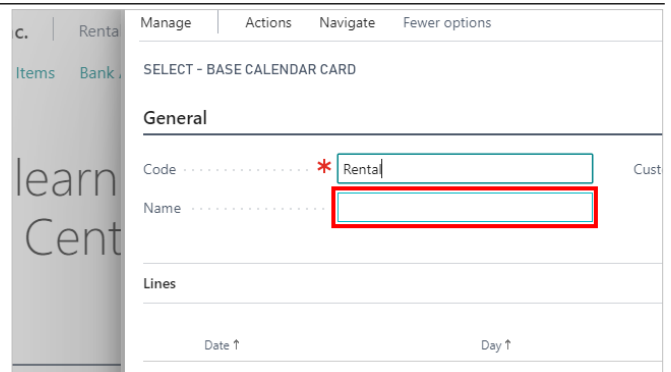
Click on the field **Code**

The screenshot shows the 'SELECT - BASE CALENDAR CARD' form. The 'Code' field is highlighted with a red box. Other fields include 'Name' and 'Lines'. A 'learn Cent' sidebar is visible on the left.

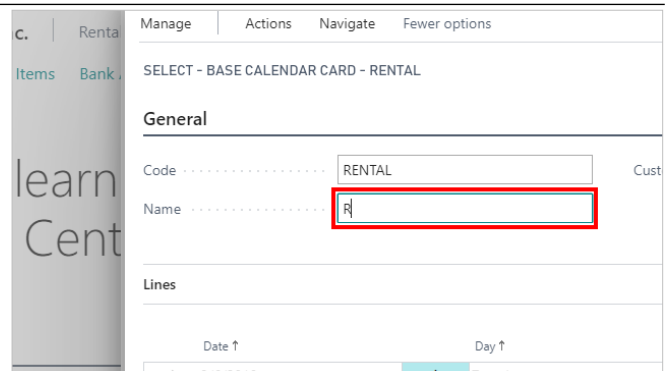
Enter the text **Rental**.



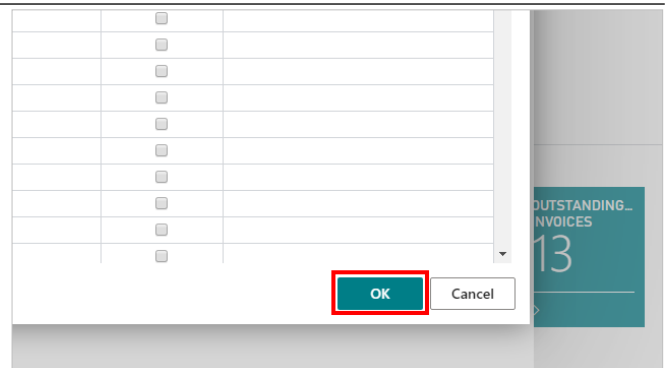
Click on the field **Name**



Enter the text **Rental Calendar**.



Click on the button **OK**

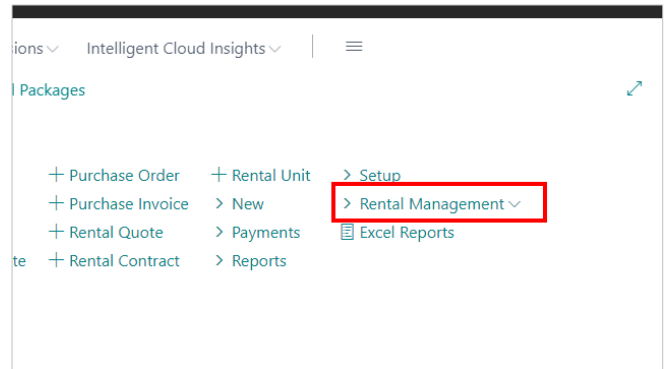


4.2.3.3. How to Set Up Document Labels for Periodic Usage and Standby Charges

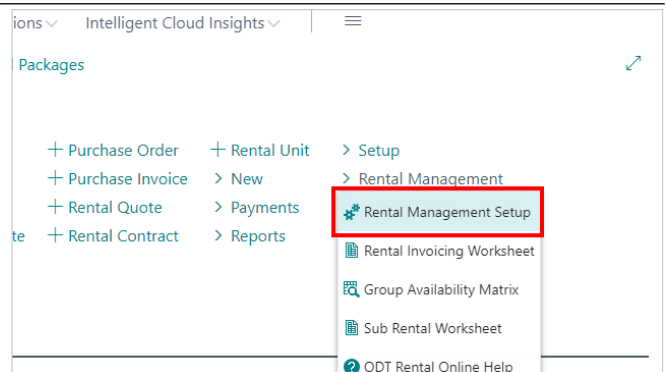
The following demonstrates the configuration on Rental Management Setup related to Periodic Usage and Standby Charges.

ODT Rentals Online Help

Click on the navigation menu item popup **Rental Management**

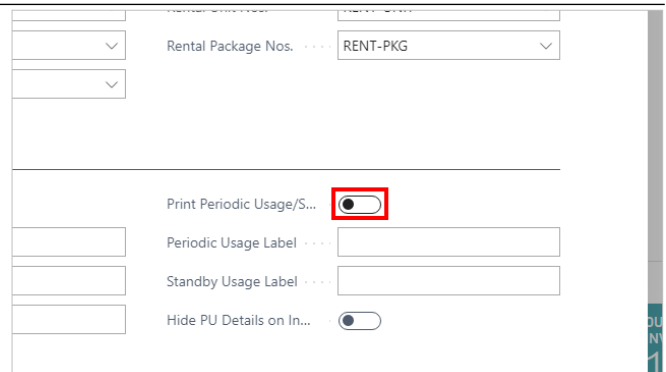


Click on the navigation menu item **Rental Management Setup**

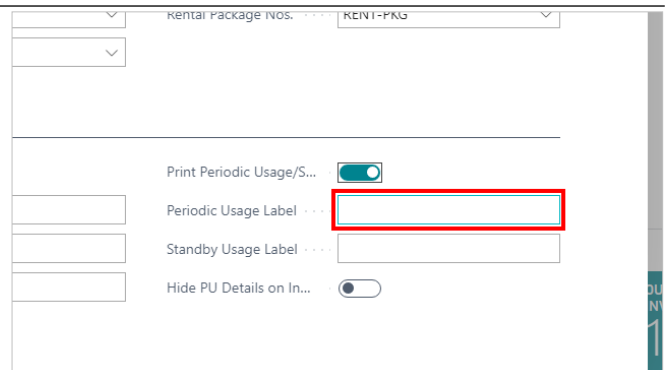


Click on the toggle field **Print Periodic Usage/Standby Prices**

This field is used to specify whether the Periodic Usage and Standby Charge prices are to print on the Rental Quote and Rental Contract documents. When enabled, the prices will print. When not enabled, the prices do not print.



Click on the field **Periodic Usage Label**





ODT Rentals Online Help

Enter the text **Days in Use**.

Enter what labelling is to print for Periodic Usage.

The screenshot shows the 'Rental Package IVOS' dropdown menu set to 'RENT-PKG'. Below it, the 'Print Periodic Usage/S...' toggle is turned on. The 'Periodic Usage Label' field is highlighted with a red box and contains the text 'd'. The 'Standby Usage Label' field is empty. The 'Hide PU Details on In...' toggle is turned off.

Click on the field **Standby Usage Label**

The screenshot shows the 'Periodic Usage Label' field set to 'Days in Use'. The 'Standby Usage Label' field is highlighted with a red box and is empty. The 'Print Periodic Usage/S...' toggle is turned on. The 'Hide PU Details on In...' toggle is turned off.

Enter the text **Days on Standby**.

Enter what labelling is to print for Standby Charges, if applicable to the organization.

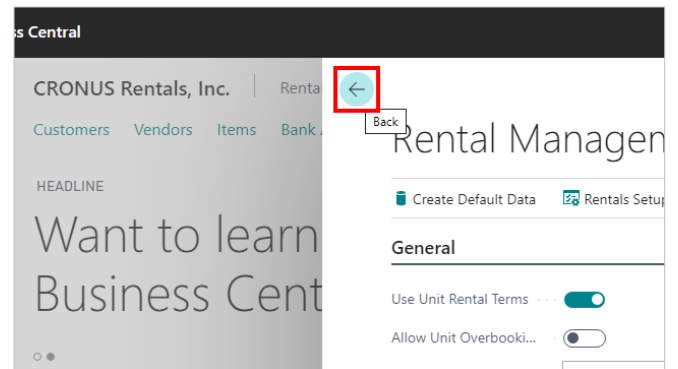
The screenshot shows the 'Periodic Usage Label' field set to 'Days in Use'. The 'Standby Usage Label' field is highlighted with a red box and contains the text 'd'. The 'Print Periodic Usage/S...' toggle is turned on. The 'Hide PU Details on In...' toggle is turned off.

Click on the link **Hide PU Details on Invoice**

Should an organization prefer that on the Proforma and Posted Rental Invoice that only a summary of the Periodic Usage and Standby Charges print, rather than printing a line for each day in use or standby, then enable this field.

The screenshot shows the 'Print Periodic Usage/S...' toggle turned on. The 'Periodic Usage Label' field is set to 'Days in Use'. The 'Standby Usage Label' field is set to 'Days on Standby'. The 'Hide PU Details on In...' link is highlighted with a red box and is turned off.

Click on the back button



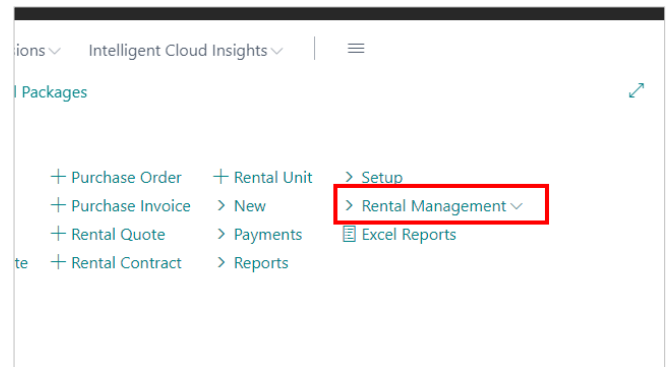
4.2.4. How to Set Up General Posting Setup for Periodic Usage

4.2.4.1. Overview

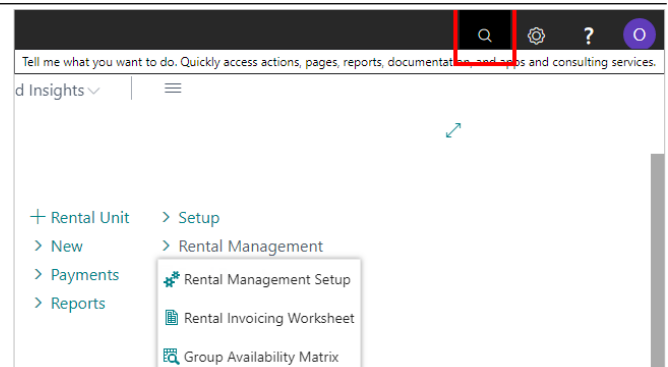
When an organization uses the Periodic Usage and Standby Charge feature, then on the General Posting Setup, a G/L Account must be entered in the Periodic Usage Account and, if applicable, Standby Charge Account fields on all applicable records to specify where the periodic usage and standby charge revenue are to be posted to.

4.2.4.2. How to Set Up General Posting Setup for Periodic Usage and Standby Charges

Click on the navigation menu item popup **Rental Management**

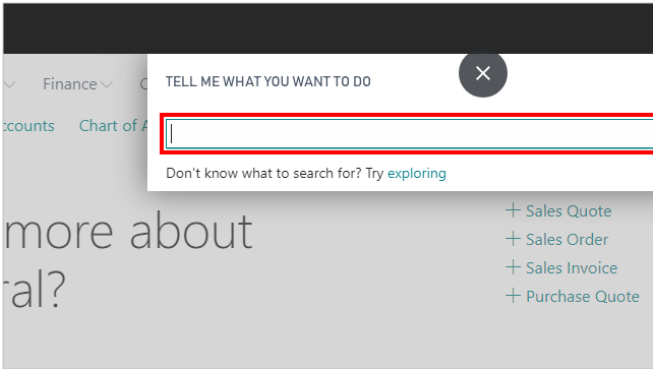


Click on the link

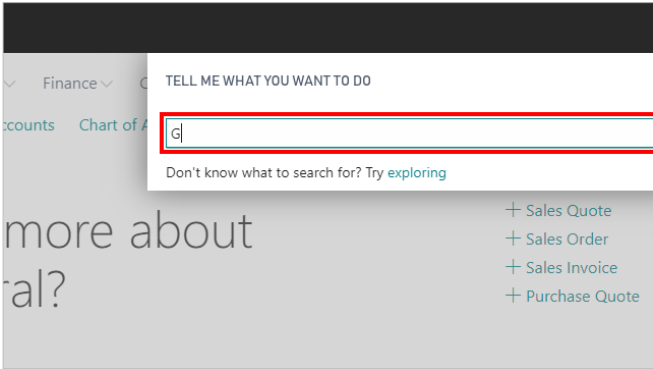




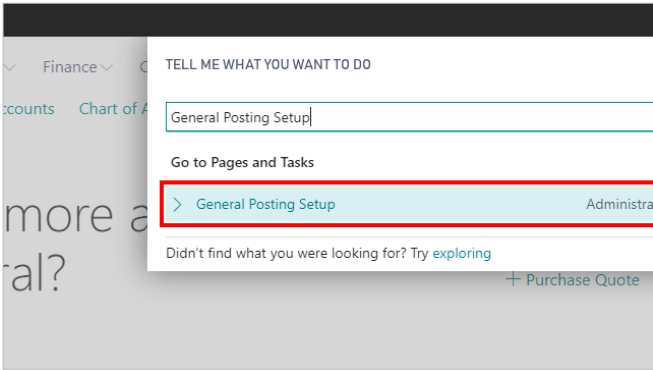
Click on the field **Type to start search:**



Enter the text **General Posting Setup**.



Click on **General Posting Setup Administration** ☐



Click on a **record which will require the rental Periodic Usage, and if applicable, Standby revenue G/L Accounts to be specified.**

Gen. Bus. Posting Group ↑	Gen. Prod. Posting Group ↑	Description
→	NO TAX	
	RETAIL	
DOMESTIC	NO TAX	
DOMESTIC	RETAIL	
DOMESTIC	SERVICES	
FOREIGN	NO TAX	
FOREIGN	RETAIL	
FOREIGN	SERVICES	

ODT Rentals Online Help

Click on the cell **Periodic Usage Account**

Damage Waiver Account	Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		
40100	50100	40100		

Click on the lookup button in the cell **Periodic Usage Account**

Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account
50100	40100		
50100	40100		
50100	40100		
50100	40100	<input checked="" type="checkbox"/>	

Income/Bal...

Bloc...

Direct Post...

SHEET	Balance Sh...	<input type="checkbox"/>	<input type="checkbox"/>
	Balance Sh...	<input type="checkbox"/>	<input type="checkbox"/>
account	Balance Sh...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on the link in cell **No.** with the value **40100**

Select the G/L Account that the Periodic Usage revenue is to be posted to.

10700			40100	40100	50100	40100
10700			40100	40100	50100	40100
10700			40100	40100	50100	40100
10700			40100	40100	50100	40100
10700						
10700						
10700						
10700						

No.	Name	In
40001	INCOME	In
40100	Income, Services	In
402	Select record "40100"	Product Sales
40250	Job Sales	In
40300	Sales Discounts	In
40400	Sales Returns & Allowances	In
+ New		

Click on the cell **Standby Charge Account**

Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account		
50100	40100				
50100	40100				
50100	40100				
50100	40100	40100	✓		
50100	40100				
50100	40100				
50100	40100				
50100	40100				



Click on the field **No.**

Unit Card

Actions Navigate Fewer options

Open assist edit

Press the **Enter** key.

When creating a unit, and will be using the default No. Series, then press the enter key. If using manual numbering, then enter the desired number in the No. field.

Unit Card

Actions Navigate Fewer options

Click on the field **Description**

Actions Navigate Fewer options

RU00024

Enter the text **Wacker 50Z3 Excavator Group**.

Actions Navigate Fewer options

RU00024

W



ODT Rentals Online Help

Click on the field **Gen. Prod. Posting Group**

WACHER 5025 EXCAVATOR GROUP

Look up value

Click on the link in cell **Code** with the value **RETAIL**

Prod. Posting Group

Code ↑	Description
→ NO TAX	Miscellaneous without tax
RETAIL	Retail
SERVIC	Select record "RETAIL" urces, etc.

+ New

Click on the field **Tax Group Code**

WACHER 5025 EXCAVATOR GROUP

Look up value

Click on the link in cell **Code** with the value **SUPPLIES**

Select the applicable Tax Group Code.

Code ↑	Description
→ FURNITURE	Taxable Olympic Furniture
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supplies

+ New Select record "SUPPLIES"



ODT Rentals Online Help

Click on the toggle field Group

Posting

Gen. Prod. Posting Group RETAIL

Rental

Group ☒

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code

Click on the toggle field Allow Overbooking

Rental

Group ☒

Group No. RU00024

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code

Minimum Rental Duration 1 second

Group Qty.

Group Quote Qty.

Click on the field Rental Terms Code

..... ☒ Gro

..... RU00024 ... Gro

..... ☐ Gro

..... ☒ On

..... ☐ On

n 1 second Look up value Res

..... 0 Ava

..... 0.00 Ser

Click on the link in cell Code with the value MONTH-PEND

Select the Rental Terms Code which will be used the most with this group. The setup of this field is optional. The Rental Term will default to the Rental Line, if on Rental Management Setup, the field, Use Unit Rental Term is enabled.

..... ☒

al Terms Code

CodeDescriptionMONTH-END-PROR...Monthly Rental for ProratedMONTH-END-TIMEMonthly Rental for Billing atMONTH-PENDMonthly Rental - Per. BillingMONTH-PEND EARLYMonthly Rental - Early Per. EMONTH-PEND-OPTMonthly Rental - Per. OptimMONTH-PSTARTMonthly Rental - Per. Billing+ New

mum Rental Duration

p Qty.

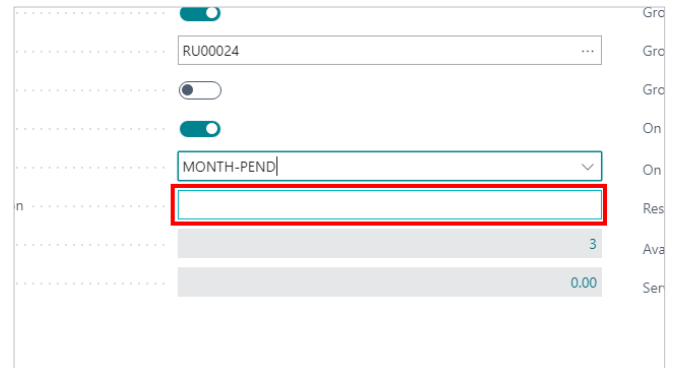
p Quote Qty.

ge

ny=CRONUS Rentals%2C Inc.&runiframe=1#

ODT Rentals Online Help

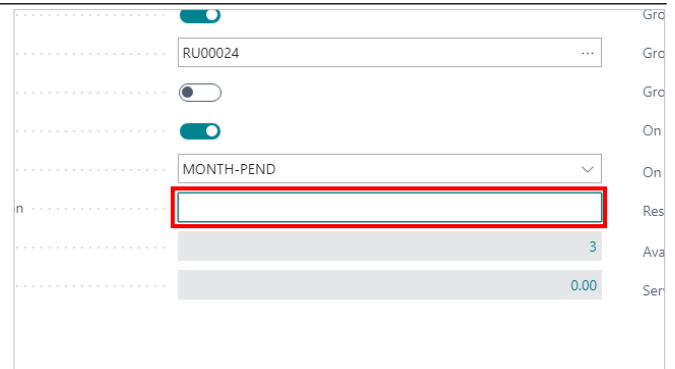
Click on the field **Minimum Rental Duration**



A screenshot of a web form showing the 'Minimum Rental Duration' field. The field is a dropdown menu with 'MONTH-PEND' selected. A red rectangle highlights the dropdown menu. To the right of the dropdown, there are two rows of data: one with a value of '3' and another with a value of '0.00'.

Enter the text **1 Day**.

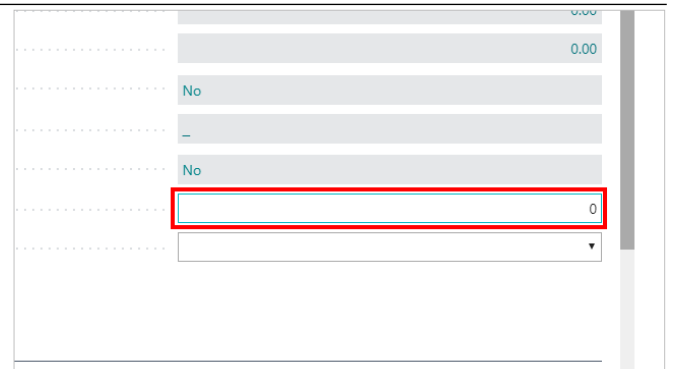
For Periodic Usage, the Minimum Rental Duration cannot be less than a day.



A screenshot of the same web form as above, but with '1 Day' entered in the 'Minimum Rental Duration' dropdown menu. A red rectangle highlights the dropdown menu. The data rows to the right remain the same.

Click on the field **Availability Warning**

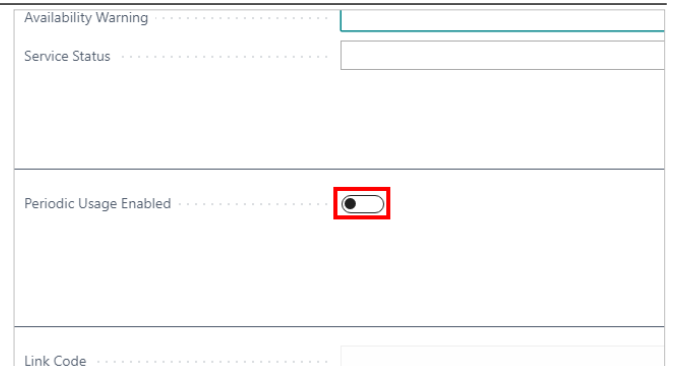
Should an Availability warning be wanted to show on the Group Availability Matrix, then enter the quantity at which the warning should occur.



A screenshot of a web form showing the 'Availability Warning' field. The field is a text input with '0' entered. A red rectangle highlights the text input. Above the input, there are two rows of data: one with a value of '0.00' and another with a value of '0.00'.

Click on the toggle field **Periodic Usage Enabled**

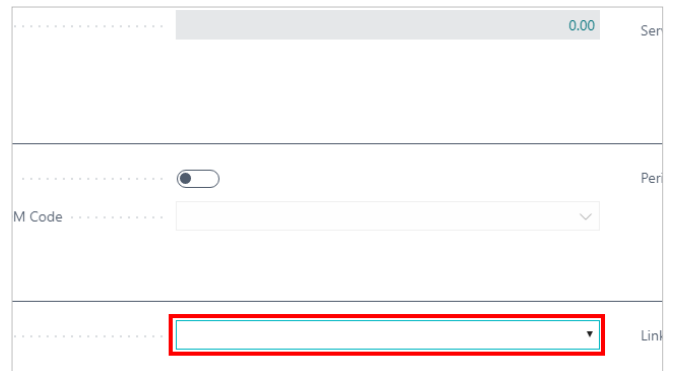
When using Periodic Usage, this field must be enabled in order to have access to the Rental Periodic Usage Calendar on the Rental Contract, Rental Lines command bar.



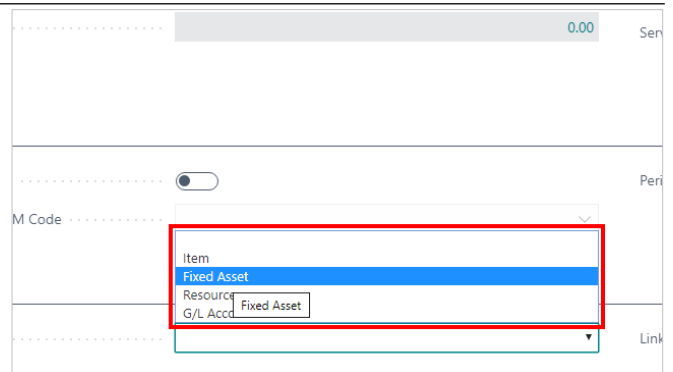
A screenshot of a web form showing the 'Periodic Usage Enabled' toggle field. The toggle is currently turned off. A red rectangle highlights the toggle switch. Above the toggle, there are two rows of data: one with a value of '0.00' and another with a value of '0.00'.

Should an organization be going to link units assigned to the group to Fixed Assets, then complete the following steps.

Click on the field **Link Type**



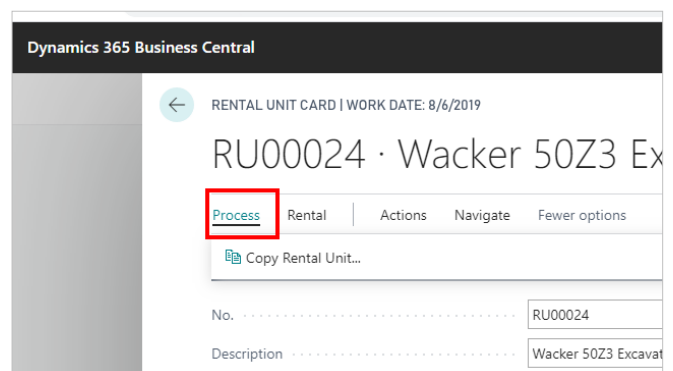
Click on the item **Fixed Asset** in the list



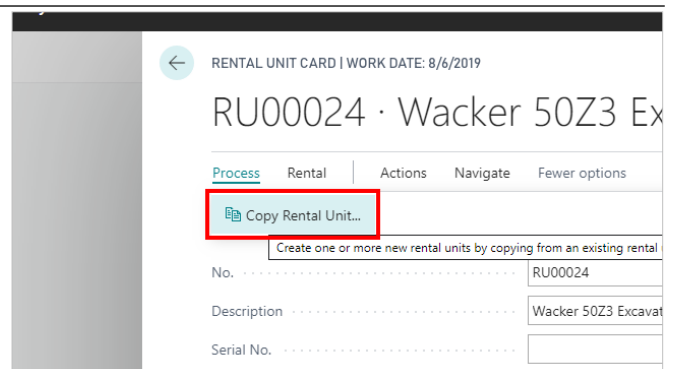
The following demonstrates the copying of the group to create Rental Units and Fixed Assets for the units created.

The Periodic Usage setting on the unit being copied, will be copied to the new units.

Click on the navigation menu item popup **Process**



Click on the navigation menu item **Copy Rental Unit...**





Click on the field **No. of Copies**

The screenshot shows a web interface with a sidebar on the left and a main content area on the right. The sidebar contains a search bar and a list of items. The main content area has a form with several fields. The 'No. of Copies' field is highlighted with a red box. The field contains the number '3'. The form also includes a 'First RU No.' field, a 'Series' dropdown, an 'Asset' dropdown, and a 'Templates' dropdown. The 'Series' dropdown is set to 'RU00024'. The 'Asset' dropdown is set to 'WACKER 50Z3 EX'. The 'Templates' dropdown is set to 'SUPPLIES'.

Enter the text **3**.

The screenshot shows the same web interface as the previous one. The 'No. of Copies' field is highlighted with a red box. The field contains the number '3'. The form also includes a 'First RU No.' field, a 'Series' dropdown, an 'Asset' dropdown, and a 'Templates' dropdown. The 'Series' dropdown is set to 'RU00024'. The 'Asset' dropdown is set to 'WACKER 50Z3 EX'. The 'Templates' dropdown is set to 'SUPPLIES'.

Click on the field **First RU No.**

The screenshot shows the same web interface as the previous ones. The 'First RU No.' field is highlighted with a red box. The field is empty. The form also includes a 'No. of Copies' field, a 'Series' dropdown, an 'Asset' dropdown, and a 'Templates' dropdown. The 'No. of Copies' field contains the number '3'. The 'Series' dropdown is set to 'RU00024'. The 'Asset' dropdown is set to 'WACKER 50Z3 EX'. The 'Templates' dropdown is set to 'SUPPLIES'.

Enter the text **RU00024-001**.

In this example, the numbering will be manual numbering, therefore the field, First RU No., must be populated.

The screenshot shows the same web interface as the previous ones. The 'First RU No.' field is highlighted with a red box. The field contains the text 'RU00024-001'. The form also includes a 'No. of Copies' field, a 'Series' dropdown, an 'Asset' dropdown, and a 'Templates' dropdown. The 'No. of Copies' field contains the number '3'. The 'Series' dropdown is set to 'RU00024'. The 'Asset' dropdown is set to 'WACKER 50Z3 EX'. The 'Templates' dropdown is set to 'SUPPLIES'.

In order to automatically create Fixed Assets when creating new Rental Units, a Fixed Asset Configuration Template must be setup.

To learn about setting up the Fixed Asset Configuration Template, see ODT Rentals Online Help, Setup Rentals, Set Up Rental Units, How to Copy Rental Units and Create Fixed Assets.



ODT Rentals Online Help

Click on the toggle field Create Fixed Asset

Click on the field **Fixed Asset Templates**

Click on the lookup button **Fixed Asset Templates**

Click on the link in cell **Description** with the value **Fixed Asset Template - Rentals**



ODT Rentals Online Help

Click on the button **OK**

Series ☐

Asset ☒

Templates FA99999 ...

OK

Cancel

... Group Qty. On Rent
Group Qty. To Return
On Rent No

Click on the cell **Description** with the value **Wacker 50Z3 Excavator Group**

As the Description is copied from the group card and contains the word, Group, the description needs to be modified removing the word, Group on each line.

TAL UNIT		
Rental Unit No.	Description	Serial No.
24-001	Wacker 50Z3 Excavator Group	
24-002	Wacker 50Z3 Excavator Group	Wacker 50Z3 Excavator Group
24-003	Wacker 50Z3 Excavator Group	

Click on the cell **Serial No.**

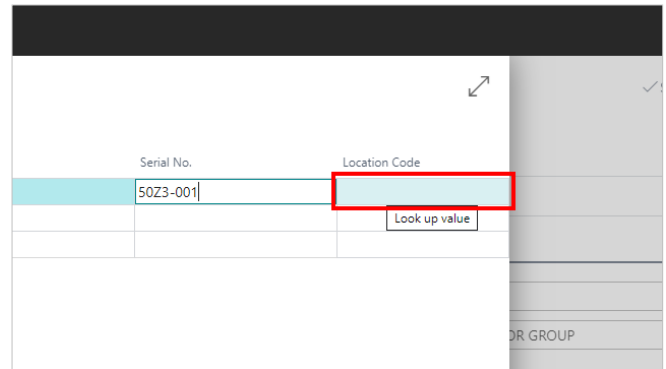
Description	Serial No.	Location Code
Wacker 50Z3 Excavator		
Wacker 50Z3 Excavator		
Wacker 50Z3 Excavator		

Enter the text **50Z3-001**.

Enter the Serial No. on each line, if the organization is recording the Serial No. on the Rental Units and Fixed Assets. The Serial No. entered here will populate the Fixed Asset cards, when they are created at the end of the copy process.

Description	Serial No.	Location Code
Wacker 50Z3 Excavator	50Z	
Wacker 50Z3 Excavator		
Wacker 50Z3 Excavator		

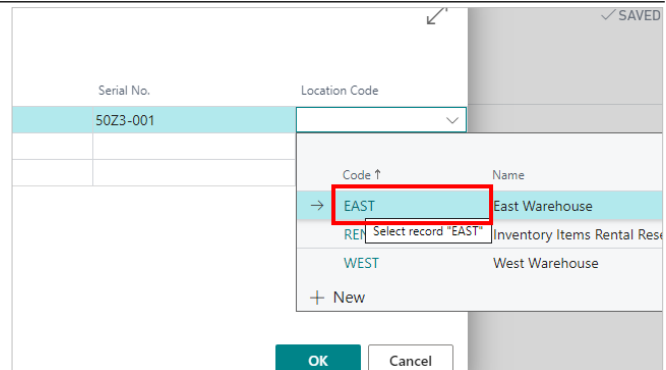
Click on the cell **Location Code**



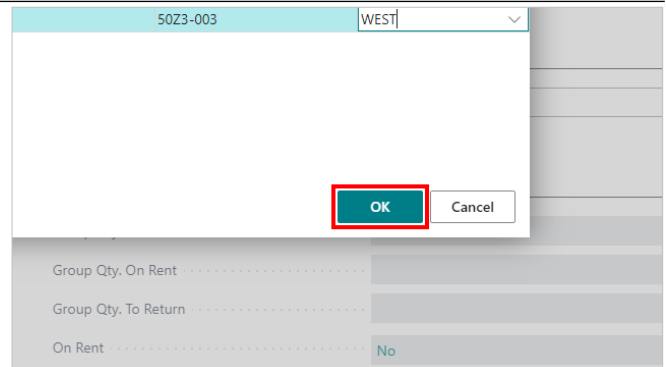
Click on the link in cell **Code** with the value **EAST**

If the organization is using Rental Locations, then select the Location that each Rental Unit will be located at.

The Fixed Asset card will have the same Location assigned, when they are created at the end of the copy process.



Click on the button **OK**



NOTE:

The Fixed Assets created will need to be acquired, and the Depreciation Book tab will need to be completed.

4.2.6. How to Set Up Rental Prices for Periodic Usage and Standby Charges

4.2.6.1. Overview

Periodic Usage and Standby pricing is used for when billing is based on days in use, and if applicable, days on standby. With this pricing the customer can be billed one rate when the equipment is in use, and a standby charge at a different price, when it is not in use.

Therefore, when setting up the prices for Periodic Usage and Standby Charges, the price to enter is a daily price.

Equipment being billed using Periodic Usage may be used in conjunction with a rental price, which would be charged each rental period.

The setup of Rental Price cards is not mandatory in order to bill customers using the periodic usage and standby pricing feature.



To learn how to process a contract using line pricing for periodic usage and standby charges, see ODT Rentals Online Help, Additional Rental Processes, Periodic Usage and Standby Charges, then How to Process a Contract Using Line Pricing.

Should the organization be charging a Damage Waiver fee, then when the fee is based on a percent, the Damage Waiver tab can be configured to include the Periodic Usage and Standby Charges in the amount the Damage Waiver is calculated on.

4.2.6.2. Price Card Field Definitions for Periodic Usage and Standby Charges

The following provides a brief overview of the Periodic Usage and Standby Charge fields on the Periodic Usage tab on the Rental Price card.

Periodic Usage Fields:

- **Periodic Usage Billing**

A toggle field, which must be enabled to activate the Periodic Usage pricing feature for invoicing. Enabling of this field is mandatory.

- **Periodic Usage Tax Group Code**

Specifies the Tax Group Code that should be applied to Periodic Usage charges and is mandatory. When Periodic Usage Billing is enabled, then the Tax Group Code entered on the General tab defaults to this field. The code can be overridden, if needed.

- **Periodic Usage Unit Price**

The field is used to specify the price to be charged per day, for periodic usage.

- **Per. Usage Allow Line Disc.**

Specifies whether Line Discounts are to be applied to Periodic Usage or not. When enabled, and a Line Discount is entered on the Rental Line, then the Line Discount will be applied to the Periodic Usage charges.

Standby Fields:

- **Standby Charge Billing:**

A toggle field, which must be enabled to activate the Standby Charge pricing feature for invoicing, when standby charges are to be billed. When billing Standby Charges, the enabling of this field is mandatory.

- **Standby Tax Group Code:**

The Tax Group Code will automatically be populated with the same Tax Group Code as entered on the General tab, and can be overridden. This field is mandatory, when billing Standby Charges.

- **Standby Unit Price:**

Specifies the price to be charged per day for standby charges.

- **Standby Allow Line Disc.:**

Specifies whether Line Discounts are to be applied to Standby Charges or not. When enabled, and a Line Discount is entered on the Rental Line, then the Line Discount will be applied to the Standby Charge.

4.2.6.3. How to Set Up Rental Price Cards for Periodic Usage

The following demonstrates the setup of a rental price card on the Rental Unit Group setup for periodic usage, with Periodic Usage and Standby prices and no rental price or damage waiver fee.



Click on the navigation menu item **Rental Units**

Navigation menu items: Cash Management, Sales, Purchasing, Setup & Extensions, Intelligent Cl...

Sub-menu items: Accounts, Rental Periods, Rental Terms, **Rental Units**, Rental Packages

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- + Rental Quote
- + Rental Contract

Click on the link in cell **No.** with the value **RU00024**

RU00022-001	Wacker Skid Steer
RU00022-002	Wacker Skid Steer
RU00023	Ford 150 Trucks Group
RU00023-001	Ford 150 Trucks
RU00023-002	Ford 150 Trucks
RU00023-003	Ford 150 Trucks
RU00024	Wacker 50Z3 Excavator Group
RU00024-001	Wacker 50Z3 Excavator
RU00024-002	Wacker 50Z3 Excavator
RU00024-003	Wacker 50Z3 Excavator

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL UNIT CARD | WORK DATE: 8/6/2019

RU00024 · Wacker 50Z3 Ex

Process **Rental** Actions Navigate Fewer options

General

No. RU00024

Description Wacker 50Z3 Excavator

Click on the navigation menu item **Rental Prices**

Dynamics 365 Business Central

RENTAL UNIT CARD | WORK DATE: 8/6/2019

RU00024 · Wacker 50Z3 Ex

Process **Rental** Actions Navigate Fewer options

Rental Prices Attributes Additional Notes Ren

Set up different rental prices. A rental price is automatically granted c
the rental price is entered on the rental line.

No. RU00024

Description Wacker 50Z3 Excavator

Serial No.



Click on the navigation menu item **New**

Dynamics 365 Business Central

RU00024 - WACKER 50Z3 EXCAVATOR GROUP | WORK DATE: 8/6/2019

Rental Price List

Search **+ New** Edit List Delete Edit View

Create a new entry.

General

Rental Term Filter

Sales Type Filter

Click on the field **Rental Terms Code**

Rental Price List

RU00024

General

No. RU00024 Price

Rental Terms Code **[Field]** Optimize

Sales Type All Customers Look up value Prorate

Sales Code Allow Line

Currency Code Tax Group

Starting Date Rental Term

Click on the link in cell **Code** with the value **MONTH-PEND**

General

No. RU00024 Price

Rental Terms Code Optimize

Sales Type

Sales Code

Currency Code

Starting Date

Ending Date

Code	Description
MONTH-END-TIME	Monthly Rental for Billing at
MONTH-PEND	Monthly Rental - Per. Billing
MOI	Select record "MONTH-PEND" Rental - Early Per. B
MONTH-PEND-OPT	Monthly Rental - Per. Optim
MONTH-PSTART	Monthly Rental - Per. Billing

+ New

Metered Usage >

Click on the field **Tax Group Code**

The selection of a Tax Group Code on the General Tab is mandatory, even when no Price is specified.

Price 0.00

Optimize Never

Prorate Never

Allow Line Disc. ☒

Tax Group Code **[Field]**

Rental Terms Code Alt1 Look up value

Rental Terms Code Alt2

No



ODT Rentals Online Help

Click on the link in cell **Code** with the value
SUPPLIES

Code	Description
FURNITURE	Taxable Olympic Furniture
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supplies

+ New Select record "SUPPLIES"

Standby Billing: 0.00

Click on the toggle field Periodic Usage Billing

For the invoicing of Periodic Usage, it is mandatory
that this field be enabled.

→ WEEK-PE

Metered Usage >

Periodic Usage

Periodic Usage Billing: ☐ Standby Bi

Periodic Usage Tax Gr...: Standby Te

Periodic Usage Unit P...: 0.00 Standby U

Per. Usage Allow Line...: Standby A

Click on the field **Periodic Usage Tax Group Code**

The Tax Group Code defaults from the General tab on
the price card, when the Periodic Usage field is
enabled, and can be modified.

Metered Usage >

Periodic Usage

Periodic Usage Billing: ☒ Standby Bi

Periodic Usage Tax Gr...: **SUPPLIES** Standby Te

Periodic Usage Unit P...: Look up value 0.00 Standby U

Per. Usage Allow Line...: ☒ Standby A

Damage Waiver

Click on the field **Periodic Usage Unit Price**

Metered Usage >

Periodic Usage

Periodic Usage Billing: ☒ Standby Bi

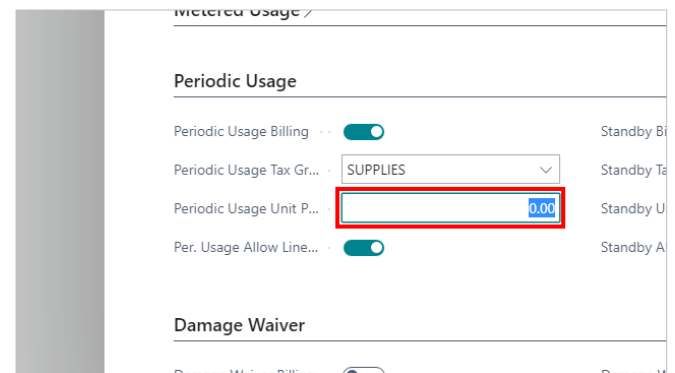
Periodic Usage Tax Gr...: SUPPLIES Standby Te

Periodic Usage Unit P...: **0.00** Standby U

Per. Usage Allow Line...: ☒ Standby A

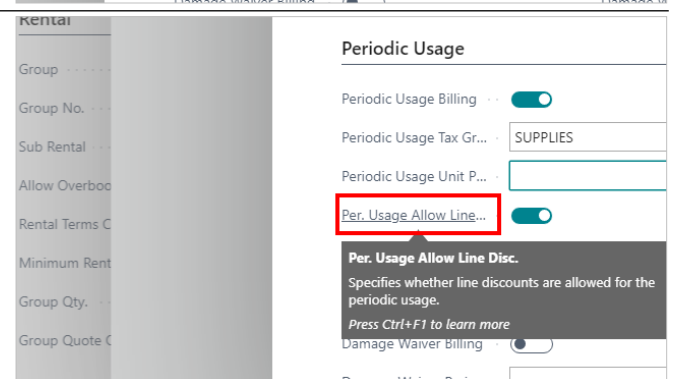
Damage Waiver

Enter the text **300.00**.



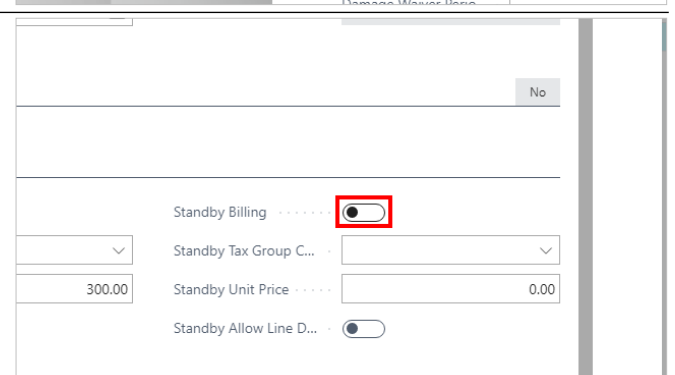
Click on the link **Per. Usage Allow Line Disc.**

When enabled, and a Line Discount % is entered on the rental line, the discount will be applied to the Periodic Usage price on the Rental Amount Lines, with a Type of Periodic Usage.



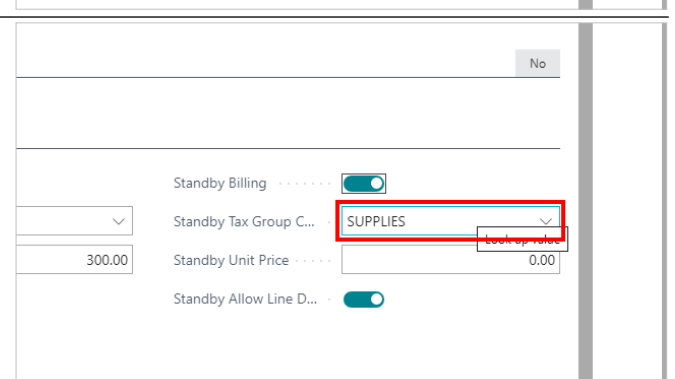
Click on the toggle field Standby Billing

For the invoicing of Standby Charges, it is mandatory that this field be enabled.
When only Periodic Usage for days in use is going to be billed to the customers, then the Standby Billing field is not to be enabled, nor are the other standby related fields to be configured.

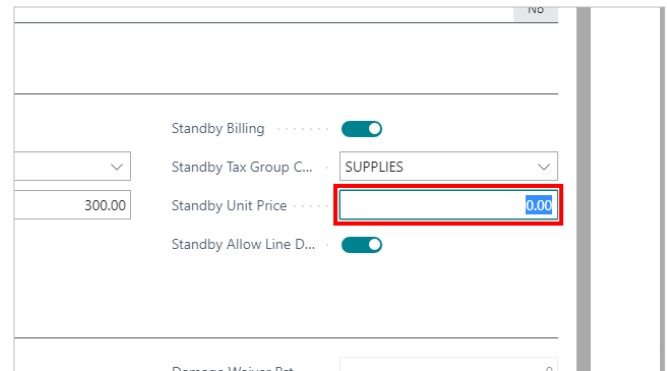


Click on the field **Standby Tax Group Code**

The Tax Group Code defaults from the General tab on the price card, when the Standby Billing field is enabled, and can be modified.



Click on the field **Standby Unit Price**



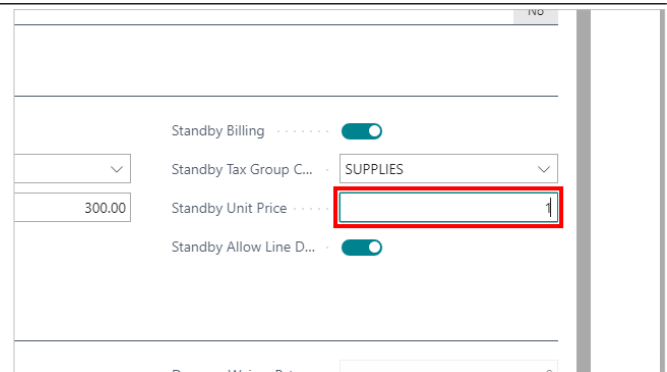
Standby Billing ☒

Standby Tax Group C... SUPPLIES

Standby Unit Price

Standby Allow Line D... ☒

Enter the text **100.00**.



Standby Billing ☒

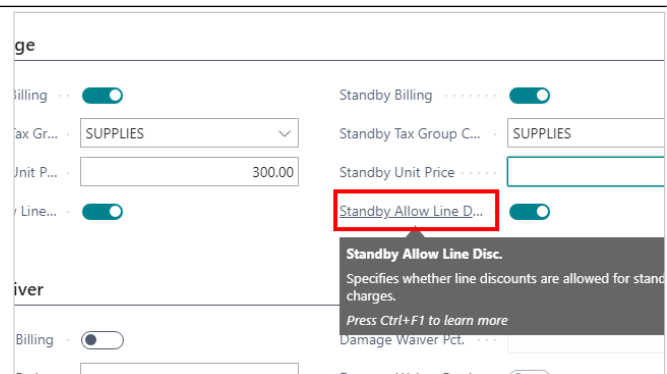
Standby Tax Group C... SUPPLIES

Standby Unit Price

Standby Allow Line D... ☒

Click on the link **Standby Allow Line Disc.**

When enabled and a Line Discount % is entered on the rental line, the discount will be applied to the Standby Charge price on the Rental Amount Lines.



Standby Billing ☒

Standby Tax Group C... SUPPLIES

Standby Unit Price

Standby Allow Line D... ☒

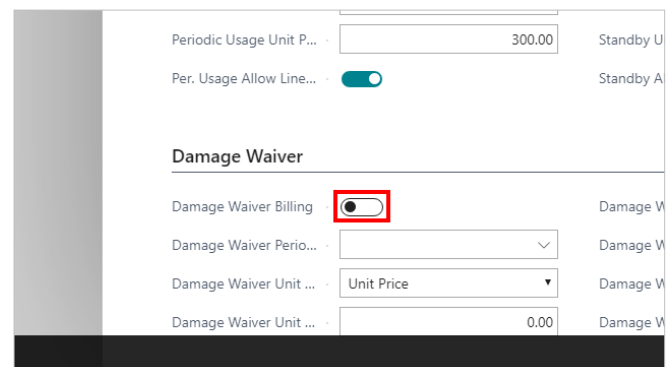
Standby Allow Line Disc.
Specifies whether line discounts are allowed for stand charges.
Press Ctrl+F1 to learn more

4.2.6.4. How to Set Up Damage Waivers to Include Periodic Usage and Standby Charges

The following demonstrates the setup of Damage Waivers as a Percent, when the Periodic Usage and Standby Charges are to be included in the amount upon which the Damage Waiver is calculated.

Click on the toggle field **Damage Waiver Billing**

For the invoicing of Damage Waivers, it is mandatory that this field be enabled.



Periodic Usage Unit P... 300.00 Standby U

Per. Usage Allow Line... ☒ Standby A

Damage Waiver

Damage Waiver Billing ☒

Damage Waiver Perio...

Damage Waiver Unit ... Unit Price

Damage Waiver Unit ... 0.00



Click on the field **Damage Waiver Period Code**

Periodic Usage Unit P... 300.00 Standby U

Per. Usage Allow Line... Standby A

Damage Waiver

Damage Waiver Billing

Damage Waiver Perio... ▼ Damage W

Damage Waiver Unit ... Unit Price Look up value ▼ Damage W

Damage Waiver Unit ... 0.00 Damage W

Click on the link in cell **Code** with the value **MONTH**

Periodic Usage Tax Gr...

Periodic Usage Unit P...

Per. Usage Allow Line...

Damage Waiver

Code ↑	Description
→ 2HR	2 Hours
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental

Damage Waiver Billing + New Select record "MONTH"

Damage Waiver Perio... ▼ Damage Waiver f

Damage Waiver Unit ... Unit Price ▼ Damage Waiver

Damage Waiver Unit ... 0.00 Damage Waiver

Click on the field **Damage Waiver Unit Price/Pct.**

Periodic Usage Unit P... 300.00 Standby U

Per. Usage Allow Line... Standby A

Damage Waiver

Damage Waiver Billing

Damage Waiver Perio... MONTH ▼ Damage W

Damage Waiver Unit ... Unit Price ▼ Damage W

Damage Waiver Unit ... 0.00 Unit Price Damage W

Click on the item **Percent** in the list

To include the Periodic Usage and Standby Charges in the amount upon which the Damage Waiver is calculated, the selection must be Percent.

Periodic Usage Unit P... 300.00 Standby U

Per. Usage Allow Line... Standby A

Damage Waiver

Damage Waiver Billing

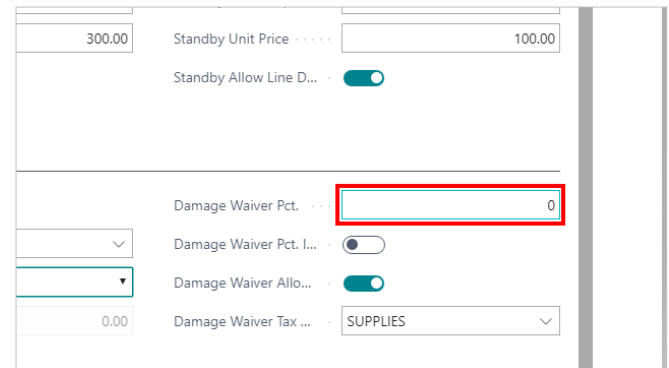
Damage Waiver Perio... MONTH ▼ Damage W

Damage Waiver Unit ... Unit Price ▼ Damage W

Damage Waiver Unit ... Unit Price Percent ▼ Damage W

Percent

Click on the field **Damage Waiver Pct.**



300.00 Standby Unit Price 100.00

Standby Allow Line D... ☒

Damage Waiver Pct. 0

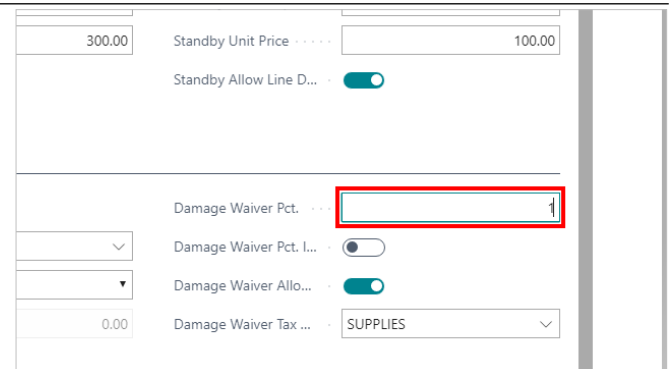
Damage Waiver Pct. I... ☐

Damage Waiver Allo... ☒

0.00 Damage Waiver Tax ... SUPPLIES

Enter the text **10**.

Enter the percentage that is to be used to calculate the Damage Waiver.



300.00 Standby Unit Price 100.00

Standby Allow Line D... ☒

Damage Waiver Pct. 10

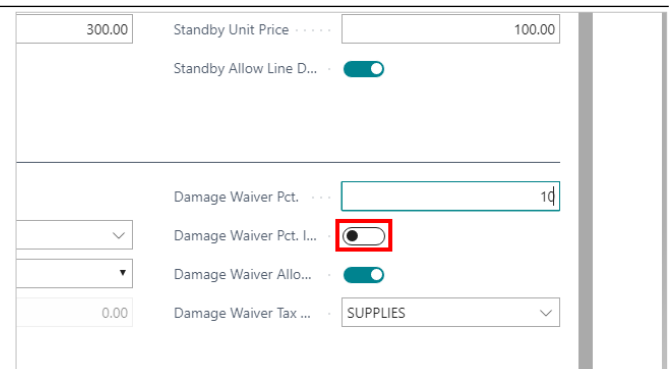
Damage Waiver Pct. I... ☐

Damage Waiver Allo... ☒

0.00 Damage Waiver Tax ... SUPPLIES

Click on the toggle field **Damage Waiver Pct. Incl. Usage**

To include the Periodic Usage and Standby Charges in the amount upon which the Damage Waiver is calculated, this field must be enabled.



300.00 Standby Unit Price 100.00

Standby Allow Line D... ☒

Damage Waiver Pct. 10

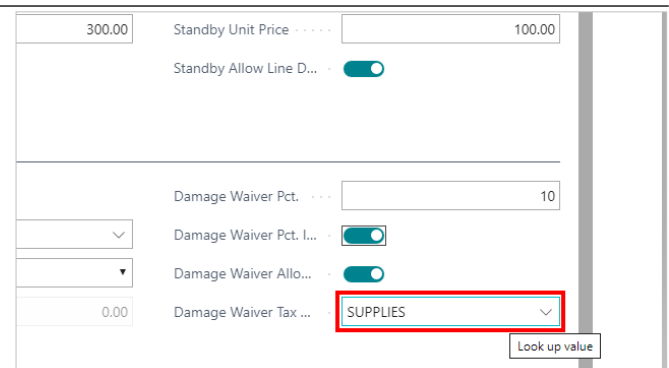
Damage Waiver Pct. I... ☒

Damage Waiver Allo... ☒

0.00 Damage Waiver Tax ... SUPPLIES

Click on the field **Damage Waiver Tax Group Code**

The Tax Group Code defaults from the General tab on the price card, when the Damage Waiver Billing field is enabled, and can be modified.



300.00 Standby Unit Price 100.00

Standby Allow Line D... ☒

Damage Waiver Pct. 10

Damage Waiver Pct. I... ☒

Damage Waiver Allo... ☒

0.00 Damage Waiver Tax ... SUPPLIES

Look up value

4.2.7. Periodic Usage Processing Overview

4.2.7.1. Overview

The processing of rentals with the Periodic Usage feature uses the Rental Periodic Usage Calendar to specify the days on which the equipment is in use, or on standby, if billing standby charges.

Rental Amount lines for the unit on the contract are created for each day in the Rental Calendar, which has the Usage Type set to either Periodic Usage or Standby. The Billing Date is set to the same date as the calendar entries.

Therefore providing the ability to invoice for days in use, and days on standby on any date within a rental period, irrespective of the Invoicing Type on the rental term setup on the rental price card.

Examples of Periodic Usage and Standby Charge pricing and processing:

- The Rental Price card has the rental term for a monthly recurring rental with invoicing to occur at the end of each rental period. The price card has a base rental price of 1000.00 per rental period and periodic usage billing is enabled with a price of 300.00 per day in use. Standby Charges are not billed for days on standby, and Damage Waivers do not include usage. The Rental Calendar is updated at the end of each rental period specifying the days in use prior to invoicing.
- The Rental Price card has the rental term for a monthly recurring rental, with invoicing to occur at the end of each rental period. The price card has a base rental price of 1000.00 per rental period, and Periodic Usage Billing enabled, with a price of 300.00 per day in use. Standby Charges are not billed for days on standby, and Damage Waivers do not include usage. The Rental Periodic Usage Calendar is updated at the end of each week, specifying the days in use during the week, and are invoiced weekly. At the end of the rental period, the calendar is updated with any additional days in use, prior to invoicing the rental period.
- The Rental Price card has the rental term for a monthly recurring rental with invoicing to occur at the end of each rental period. The price card has a base rental price of 0.00 per rental period. Periodic Usage Billing is enabled, with a price of 300.00 per day. Standby Billing is enabled, with a price of 100.00 per day. Damage Waivers calculation does include usage. The Rental Periodic Usage Calendar is updated at the end of each rental period specifying the days in use and days on standby, prior to invoicing.

Swapping Rental Units with Periodic Usage Pricing:

When swapping a Rental Unit assigned to a group within a rental period, it is recommended that the Rental Periodic Usage Calendar on the unit to be returned be updated to the date of the swap, and an invoice be posted up to that date. Thus ensuring that the Rental Values Entries created when posting the invoice, are posted to the unit being returned.

This is especially important should the units be linked to Fixed Assets. The above process will ensure that the Rental Statistics will display the Periodic Usage and Standby Charge revenue on the unit, which generated the revenue.

Should the Rental Calendar be updated on the returning unit, however, an invoice is not posted, then the Rental Amount Lines and subsequent posting of an invoice will be post the usage to the Rental Value Entries of the unit shipped out, not the unit being returned.

Should the swap function be ran, and then usage need to be entered for the unit returned, this entry must be done on the unit shipped out in the swap. Thus leading to the same results as when not invoicing usage entered on the returning unit, before running the swap.

There are fields related to the Periodic Usage feature that can be added to the Rental Lines on the Rental Contract, and if applicable, the Rental Quote.

The following chapter outlines the fields, and how to add them using the Personalize feature.

4.2.7.2. How to Add Periodic Usage Fields to the Rental Lines

The following provides a listing of the Periodic Usage related fields, which can be added to the Rental Lines using Personalize. A brief description of the fields is provided.

Periodic Usage Enabled

- Specifies whether the Periodic Usage Calendar entry is required for the Rental Unit on the line. When the field is checked, then the calendar is to be updated. The setting on this field defaults from the Rental Unit card, and cannot be modified.

Periodic Usage Billing

- Specifies whether Periodic Usage and Standby Charge pricing will be used when invoicing the customer. When using line pricing rather than rental price cards, then this field must be enabled.

Periodic Usage Period UOM Code

- Displays the UOM period code of Day, and cannot be edited.

Periodic Usage Unit Price

- Displays the Periodic Usage Unit Price, which defaults from the Rental Price card for the Rental Term selected on the Rental Line and can be modified.

Periodic Usage Tax Group Code

- Specifies the Tax Group Code to be applied to the Periodic Usage Unit Price. When a Rental Price Card exists the Periodic Usage Tax Group Code defaults to the Rental Line and can be modified. When a price card does not exist then the Tax Group Code on the Rental Line from the unit defaults to the Periodic Usage Tax Group Code and can be modified.

Standby Unit Price

- Displays the Standby Charge Unit Price, which defaults from the Rental Price card for the Rental Term selected on the Rental Line and can be modified.

Standby Tax Group Code

- Specifies the Tax Group Code to be applied to the Standby Charge Unit Price. When a Rental Price Card exists the Standby Tax Group Code defaults to the Rental Line and can be modified. When a price card does not exist then the Tax Group Code on the Rental Line from the unit defaults to the Standby Tax Group Code and can be modified.

Allow Zero Usage

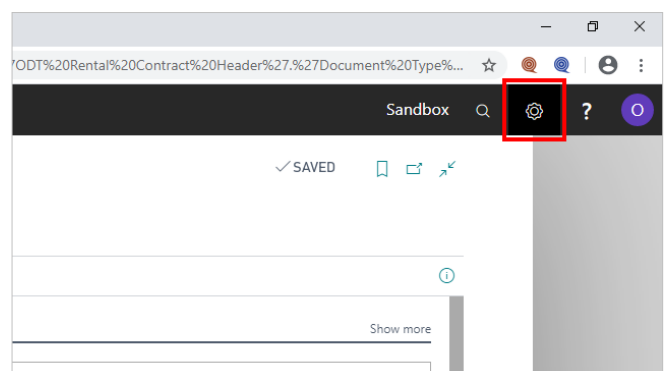
- Specifies whether a rental line unit can be invoiced without the usage being entered. When checked, will allow an invoice to be posted for rental charges, when Periodic Usage is required, however, for the rental period being invoiced, the actual days in use or on standby is not available at the time of invoicing. The field is cleared once the invoice is posted.

Cust. Declines Damage Waiver

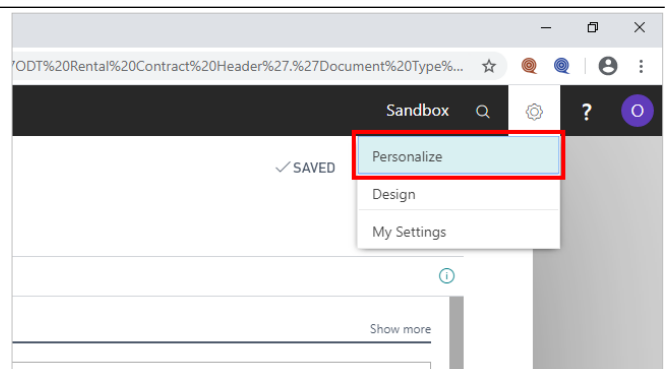
- Specifies whether the customer declines Damage Waiver fees. This field can be used when on the Rental Price card, Damage Waiver Billing is enabled and the Damage Waiver Pct. Incl. Usage field is enabled. When flagged, specifies that the customer has declined the Damage Waiver fee.

The following demonstrates how to use Personalize to add Periodic Usage related fields to the Rental Lines.

Click on the link **Settings**

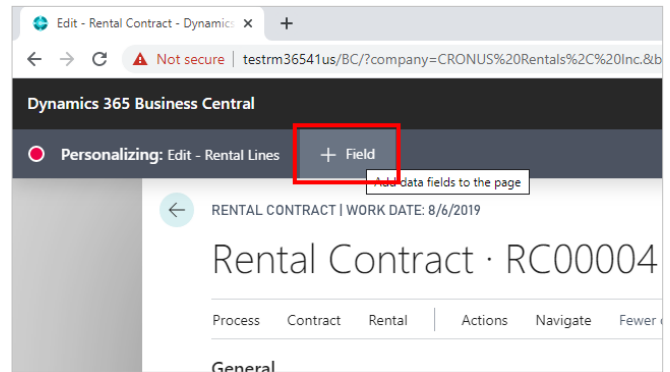


Click on the menu item **Personalize**



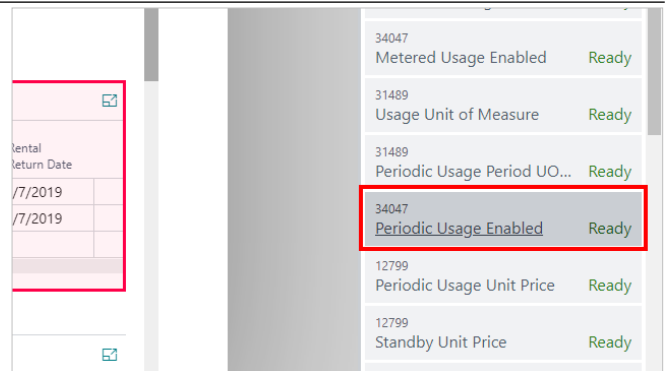
Click on the Rental Lines so that a red box outlines the Rental Lines.

Click on the link **Field**



Click and hold the left mouse button on the data brick **Periodic Usage Enabled**

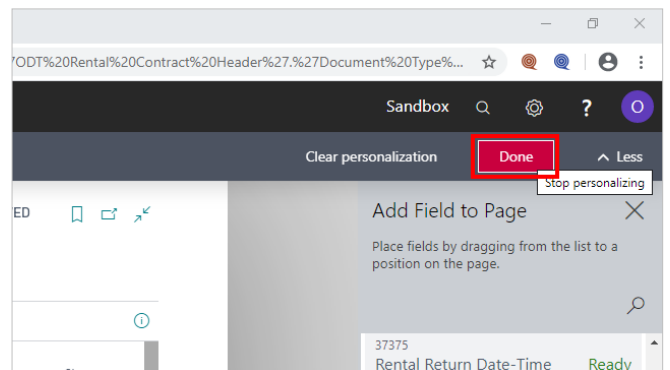
Then drag and drop the field to the desired location on the Rental Line.



Repeat the above steps for each of the Periodic Usage related fields that you want to add to the lines.

The fields can be resized while Personalize is open, or can be resized after the Personalize is closed.

Click on the link **Done**



4.2.7.3. Periodic Usage Calendar Overview

The Rental Periodic Usage Calendar is used to specify which days that the Periodic Usage price is to be billed, and if applicable, which days the Standby Charge is to be billed.

Rental Amount Lines are created for the days that have the Usage Type of Periodic Usage or Standby Charge, which are in turn used when billing the customer.

NOTE:

The Periodic Usage feature allows for days to not be billable to the customer by leaving the Usage Type set as the No Usage option.

The Rental Periodic Usage Calendar is accessed from the Rental Line Command bar, Line menu option, then Periodic Usage Entries.

The Periodic Usage Entries menu option is greyed out, and not accessible unless the Rental Unit has the Periodic Usage Enabled field enabled, and the selected unit on the line has been shipped.



The calendar will contain records for every day of the contract starting from the Rental Start Date.

When a Rental Return Date is specified on the Rental Line, the dates will start with the Rental Start Date, and end with the Rental Return date, when the return day is billable. When the return day is not billable, the return date will not be included on the calendar.

When the Rental Return Date is blank, then the dates in the calendar will initially be for only a single rental period. When a contract is extended by entering a Posting Date that is after the end of the first rental period, auto extending the contract from the Rental Invoicing Worksheet, or entering a Rental Return Date, then the additional days will be added to the calendar.

The calendar displays the days on a per rental period basis. When a rental is for multiple rental periods, the first page displays the dates for the first rental period, the second page displays the dates for the second rental period, and so on.

The following provides an overview of the Rental Periodic Usage Calendar fields.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Unit No.	Standard Text Code	Description
RU00024		Wacker 50Z3 Excavator Gro
→ RU00024-001		Wacker 50Z3 Excavator

Look up value

Click on the navigation menu item popup **Line**

Posting Date 8/9/2020
Order Date 8/9/2020
Document Date 8/9/2020

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEN
→ RU00024-001		Wacker 50Z3 Excavator	MONTH-PEN

Click on the navigation menu item **Periodic Usage Entries**

Contract Total
Outstanding Amount

options

Rental Value Entries Metered Usage Entries **Periodic Usage Entries** Item Tracking Lin

Group	MONTH-PEND	1	EAST			8/9/2020	9/8/2020
r Group	MONTH-PEND	1	EAST			8/9/2020	9/8/2020



Click on the column header **Base Calendar Code**

The Rental Calendar specified on Rental Management Setup defaults to this field.

Base Calendar Code ↑	Document Type ↑	Document No. ↑
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004

Click on the column header **Document Type**

The Document Type field displays Order, which in essence means the Rental Contract.

Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage

Click on the column header **Document No.**

The Document No. field displays the Rental Contract No.

Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑
RENTAL	Order	RC00004	20000	No Usage	4/8/20
RENTAL	Order	RC00004	20000	No Usage	4/9/20
RENTAL	Order	RC00004	20000	No Usage	4/10/2
RENTAL	Order	RC00004	20000	No Usage	4/11/2
RENTAL	Order	RC00004	20000	No Usage	4/12/2

Click on the column header **Document Line No.**

The Document Line No. displays the line number that the unit selected is on.

Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑
RENTAL	Order	RC00004	20000	No Usage	4/9/2019	Tuesda
RENTAL	Order	RC00004	20000	No Usage	4/10/2019	Wedne
RENTAL	Order	RC00004	20000	No Usage	4/11/2019	Thursd
RENTAL	Order	RC00004	20000	No Usage	4/12/2019	Friday

Click on the column header **Usage Type**

The Usage Type field is used to specify the type of usage that applies to that line. The default setting is No Usage, which means the line is not billable to the customer by default.

Inc.&bookmark=31%3bDFUsBACLAQAAAAJ7%2f1IAQwAwADAAMAADQ%3d&page=70014220&filter=

Edit List Previous Period Next Period Set Usage Clear Usage Open in

USAGE CALENDAR ENTRIES

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00004	20000	No Usage	4/8/2019	Monday	
Order	RC00004	20000	No Usage	4/9/2019	Tuesday	
Order	RC00004	20000	No Usage	4/10/2019	Wednesday	
Order	RC00004	20000	No Usage	4/11/2019	Thursday	
Order	RC00004	20000	No Usage	4/12/2019	Friday	
Order	RC00004	20000	No Usage	4/13/2019	Saturday	
Order	RC00004	20000	No Usage	4/14/2019	Sunday	

Usage Type dropdown menu: No Usage, Periodic Usage, Standby Charge. Sort on 'Usage Type'. Specifies the usage type that will be registered for this entry. Press Ctrl+F1 to learn more.

Click on the cell Usage Type

Edit List Previous Period Next Period Set Usage Clear Usage Open in

USAGE CALENDAR ENTRIES

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00004	20000	No Usage	4/8/2019	Monday	
Order	RC00004	20000	No Usage	4/9/2019	Tuesday	
Order	RC00004	20000	No Usage	4/10/2019	Wednesday	
Order	RC00004	20000	No Usage	4/11/2019	Thursday	
Order	RC00004	20000	No Usage	4/12/2019	Friday	
Order	RC00004	20000	No Usage	4/13/2019	Saturday	
Order	RC00004	20000	No Usage	4/14/2019	Sunday	

The Usage Type field contains the 3 options of, No Usage, Periodic Usage and Standby Charge.

- No Usage specifies that the day is not to be billed to the customer.
- Periodic Usage specifies that the day is to be billed to the customer at the Periodic Usage Unit Price.
- Standby Charge specifies that the day is to be billed to the customer at the Standby Unit Price.

Click on the column header **Date**

The Date column contains the date the record is for.

31%3bDFUsBACLAQAAAAJ7%2f1IAQwAwADAAMAADQ%3d&page=70014220&filter=%27ODT%2

Previous Period Next Period Set Usage Clear Usage Open in Excel

USAGE CALENDAR ENTRIES

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...	Description
Order	RC00004	20000	Periodic U	4/8/2019	Monday		
Order	RC00004	20000	No Usage	4/9/2019	Tuesday		
Order	RC00004	20000	No Usage	4/10/2019	Wednesday		
Order	RC00004	20000	No Usage	4/11/2019	Thursday		
Order	RC00004	20000	No Usage	4/12/2019	Friday		

Click on the column header **Day**

Displays the day on which the Date falls.

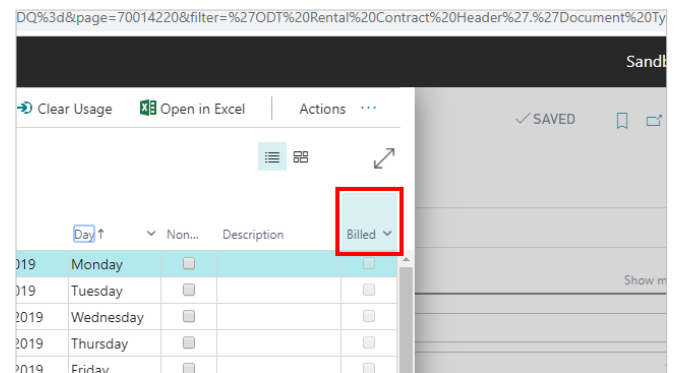
3ACLAQAAAAJ7%2f1IAQwAwADAAMAADQ%3d&page=70014220&filter=%27ODT%20Rental%20Co

Next Period Set Usage Clear Usage Open in Excel Actions

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...	Description	Billed
Order	RC00004	20000	Periodic U	4/8/2019	Monday			
Order	RC00004	20000	No Usage	4/9/2019	Tuesday			
Order	RC00004	20000	No Usage	4/10/2019	Wednesday			
Order	RC00004	20000	No Usage	4/11/2019	Thursday			
Order	RC00004	20000	No Usage	4/12/2019	Friday			

Click on the column header **Billed**

The Billed field will be checked automatically, when the day has been invoiced to the customer.



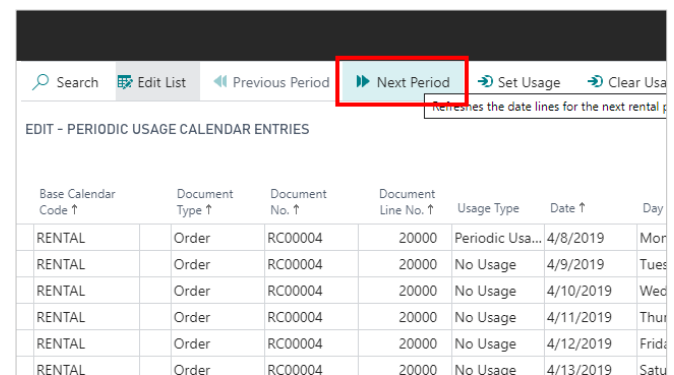
Day	Description	Billed
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		

4.2.7.4. How to Use the Rental Calendar

The following demonstrates how to use the Periodic Usage Calendar to specify which days will be classified as Periodic Usage and if applicable, Standby Charge days.

The Next Period option is available to use, when the contract is for more than a single rental period based on the Rental Return Date entered on the Rental Line.

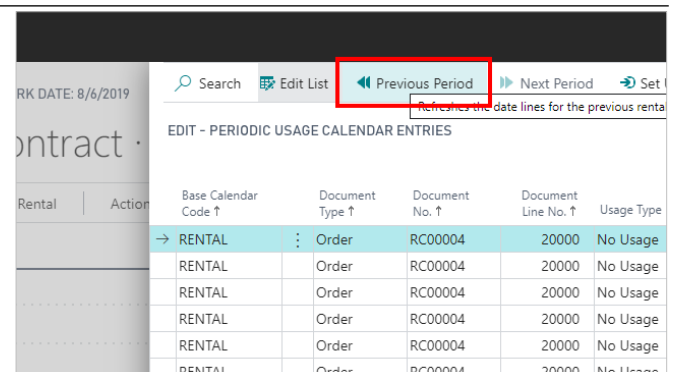
Click on the navigation menu item **Next Period**
By clicking on Next Period, the days included in the next period or partial period will be displayed.



Base Calendar Code	Document Type	Document No.	Document Line No.	Usage Type	Date	Day
RENTAL	Order	RC00004	20000	Periodic Usa...	4/8/2019	Mor
RENTAL	Order	RC00004	20000	No Usage	4/9/2019	Tues
RENTAL	Order	RC00004	20000	No Usage	4/10/2019	Wed
RENTAL	Order	RC00004	20000	No Usage	4/11/2019	Thur
RENTAL	Order	RC00004	20000	No Usage	4/12/2019	Frid
RENTAL	Order	RC00004	20000	No Usage	4/13/2019	Satu

Click on the navigation menu item **Previous Period**

By clicking on the Previous Period, the days in the prior period will be displayed.



Base Calendar Code	Document Type	Document No.	Document Line No.	Usage Type
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage
RENTAL	Order	RC00004	20000	No Usage

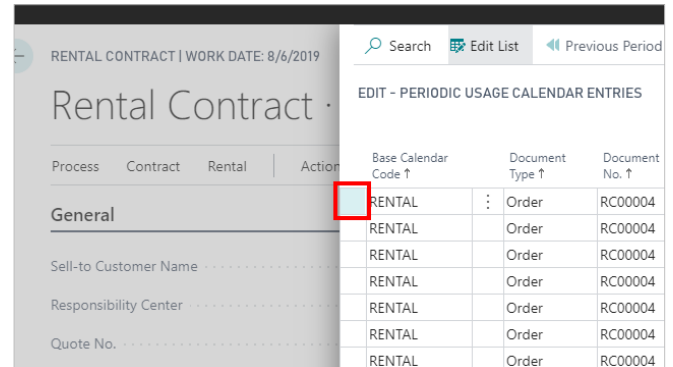
There are multiple different ways in which to set the Usage Type option on the calendar records. The following explain the various ways.

- On each record, the Usage Type can be selected.
- Using the Select More option on a record, select the records, to be set to either Periodic Usage or Standby Charge. Then click on the menu option Set Usage, and select whether the Usage Type is to be set to Periodic Usage or Standby Charge.
- If a range of days are to be selected, then like in excel, click on the first record, then press and hold the shift key and click on the last record. Then click on the menu option Setup Usage, and select whether the Usage Type is to be set to Periodic Usage or Standby Charge.
- If the days to be selected are not continuous, then like in excel, click on the first day to be included, then press and hold the Ctrl key, and then click on the other days to be included. Then click on the menu option Setup

Usage, and select whether the Usage Type is to be set to Periodic Usage or Standby Charge.

The following demonstrates the selecting of a range of days and setting the Usage Type to Periodic Usage.

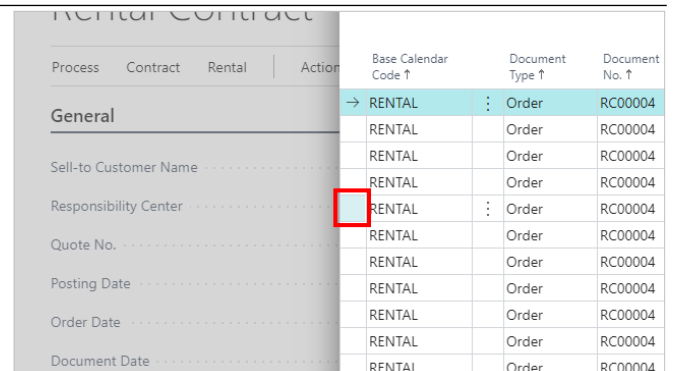
Click on **the first day to be included in the range of days.**



Base Calendar Code ↑	Document Type ↑	Document No. ↑
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004

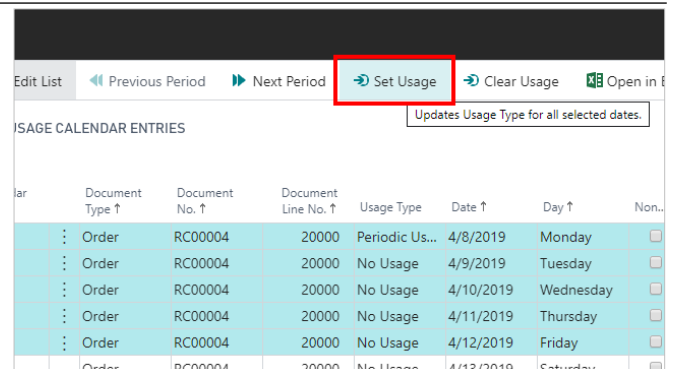
Press and hold the **Shift** key down.

Click on **the last day to be included in the range of days.**



Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004
RENTAL	Order	RC00004

Click on the navigation menu item **Set Usage**



Set Usage

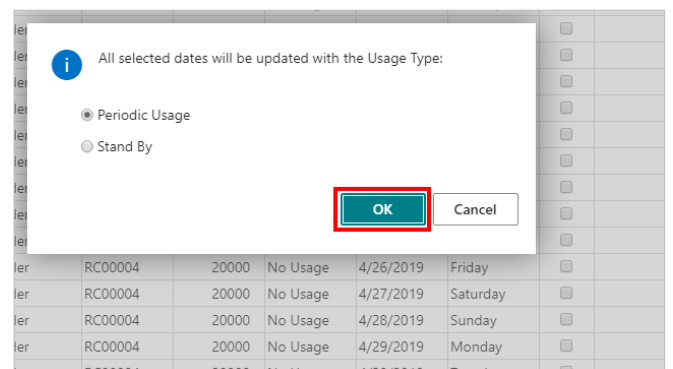
Updates Usage Type for all selected dates.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00004	20000	Periodic Us...	4/8/2019	Monday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/9/2019	Tuesday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/10/2019	Wednesday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/11/2019	Thursday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/12/2019	Friday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/13/2019	Saturday	<input type="checkbox"/>

By default the Periodic Usage option is selected.

If the records were to be set to Standby Charge, then the option Standby Charge would need to be selected.

Click on the button **OK**



All selected dates will be updated with the Usage Type:

☒ Periodic Usage
☐ Stand By

OK Cancel

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Click on the cell **Usage Type** with the value **Periodic Usage**

Note that the records selected now have the Usage Type set to Periodic Usage.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00004	20000	Periodic Usage...	4/8/2019	Monday	<input type="checkbox"/>
Order	RC00004	20000	Periodic Usage	4/9/2019	Tuesday	<input type="checkbox"/>
Order	RC00004	20000	Periodic Usage...	4/10/2019	Wednesday	<input type="checkbox"/>
Order	RC00004	20000	Periodic Usage...	4/11/2019	Thursday	<input type="checkbox"/>
Order	RC00004	20000	Periodic Usage	4/12/2019	Friday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/13/2019	Saturday	<input type="checkbox"/>
Order	RC00004	20000	No Usage	4/14/2019	Sunday	<input type="checkbox"/>

Click on the button **Close**

28/2019	Sunday	<input type="checkbox"/>	<input type="checkbox"/>
29/2019	Monday	<input type="checkbox"/>	<input type="checkbox"/>
30/2019	Tuesday	<input type="checkbox"/>	<input type="checkbox"/>
1/2019	Wednesday	<input type="checkbox"/>	<input type="checkbox"/>
2/2019	Thursday	<input type="checkbox"/>	<input type="checkbox"/>
3/2019	Friday	<input type="checkbox"/>	<input type="checkbox"/>
4/2019	Saturday	<input type="checkbox"/>	<input type="checkbox"/>
5/2019	Sunday	<input type="checkbox"/>	<input type="checkbox"/>
6/2019	Monday	<input type="checkbox"/>	<input type="checkbox"/>

Close

The following demonstrates how to clear the usage that was previously set on a couple of the records that are not continuous.

Click on **the first day** to be included in the range of days.

[illegible]

Press and hold the **Ctrl** key down.

Click on **the last day to be included in the range of days.**

Process	Contract	Rental	Action
General			
Sell-to Customer Name	RENTAL	Order	RC000004
Responsibility Center	RENTAL	Order	RC000004
Quote No.	RENTAL	Order	RC000004
Posting Date	RENTAL	Order	RC000004
Order Date	RENTAL	Order	RC000004
Document Date	RENTAL	Order	RC000004



Click on the navigation menu item **Clear Usage**

Previous Period	Next Period	Set Usage	Clear Usage	Open in Excel	
-----------------	-------------	-----------	-------------	---------------	--

Clears Usage Type for all selected dates.

Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...	Description
RC00004	20000	Periodic Us...	4/8/2019	Monday		
RC00004	20000	Periodic Us...	4/9/2019	Tuesday		
RC00004	20000	Periodic Us...	4/10/2019	Wednesday		
RC00004	20000	Periodic Us...	4/11/2019	Thursday		
RC00004	20000	Periodic Usag	4/12/2019	Friday		
RC00004	20000	No Usage	4/13/2019	Saturday		

Click on the cell **Usage Type** with the value **No Usage**

Note that the 2 selected records have had the Usage Type reset to the No Usage option.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00004	20000	Periodic Usa...	4/8/2019	Monday	
Order	RC00004	20000	Periodic Usa...	4/9/2019	Tuesday	
Order	RC00004	20000	No Usage	4/10/2019	Wednesday	
Order	RC00004	20000	Periodic Usag	4/11/2019	Thursday	
Order	RC00004	20000	No Usage	4/12/2019	Friday	
Order	RC00004	20000	No Usage	4/13/2019	Saturday	
Order	RC00004	20000	No Usage	4/14/2019	Sunday	
Order	RC00004	20000	No Usage	4/15/2019	Monday	
Order	RC00004	20000	No Usage	4/16/2019	Tuesday	

4.2.8. How to Process a Contract with Periodic Usage Pricing

4.2.8.1. How to Process a Contract with Periodic Usage Pricing

The following demonstrates the creation and processing of a Rental Contract, where the rental price card does not have a rental price, however, has Periodic Usage and Standby Charge pricing.

The contract is for 2 rental periods, with a periodic end monthly rental term, and the Periodic Usage and Standby Charges days are specified at the end of each period prior to invoicing.

Click on the navigation menu item **Rental Contract**

Rental Terms	Rental Units	Rental Packages
--------------	--------------	-----------------

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit	> Se
+ Sales Order	+ Purchase Invoice	> New	> R
+ Sales Invoice	+ Rental Quote	> Payments	Ex
+ Purchase Quote	+ Rental Contract	> Reports	

Create a new rental contract for rental produ

Click on the field **Sell-to Customer Name**

Contract

Rental | Actions | Navigate | Fewer options

Sell-to Customer Name

Look up value



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Click on the link in cell **No.** with the value **10000**

Process	Contract	Rental	Actions	Navigate	Fewer options																		
General																							
Bill-to Customer Name																							
Responsibility Center																							
Note No.																							
Posting Date																							
Order Date																							
Document Date																							
<table><thead><tr><th>No.</th><th>Name</th><th>ZIF</th></tr></thead><tbody><tr><td>10000</td><td>Adatum Corporation</td><td>31</td></tr><tr><td>20000</td><td>Trey Research</td><td>61</td></tr><tr><td>30000</td><td>School of Fine Art</td><td>37</td></tr><tr><td>40000</td><td>Alpine Ski House</td><td>31</td></tr><tr><td>50000</td><td>Relecloud</td><td>31</td></tr></tbody></table>						No.	Name	ZIF	10000	Adatum Corporation	31	20000	Trey Research	61	30000	School of Fine Art	37	40000	Alpine Ski House	31	50000	Relecloud	31
No.	Name	ZIF																					
10000	Adatum Corporation	31																					
20000	Trey Research	61																					
30000	School of Fine Art	37																					
40000	Alpine Ski House	31																					
50000	Relecloud	31																					
+ New																							

Click on the cell **Rental Unit No.**

Document Date			4/8/2019
Rental Lines			
Manage Line Functions Fewer options			
Rental Unit No.	Standard Text Code	Description	
Sales Lines			
Manage More options			

Click on the lookup button in the cell **Rental Unit No.**

Document Date			4/8/2019
Rental Lines			
Manage Line Functions Fewer options			
Rental Unit No.	Standard Text Code	Description	
Sales Lines			
Manage More options			

Click on the link in cell **No.** with the value **RU00024**

Sales Lines			Manage	More options																				
Type	No.	Description																						
<table><tbody><tr><td>RU00022-0...</td><td>Wacker Skid Steer</td></tr><tr><td>RU00022-0...</td><td>Wacker Skid Steer</td></tr><tr><td>RU00023</td><td>Ford 150 Trucks Group</td></tr><tr><td>RU00023-0...</td><td>Ford 150 Trucks</td></tr><tr><td>RU00023-0...</td><td>Ford 150 Trucks</td></tr><tr><td>RU00023-0...</td><td>Ford 150 Trucks</td></tr><tr><td>RU00024</td><td>Wacker 5023 Excavator Group</td></tr><tr><td>RU00024-0...</td><td>Wacker 5023 Excavator</td></tr><tr><td>RU00024-0...</td><td>Wacker 5023 Excavator</td></tr><tr><td>RU00024-0...</td><td>Wacker 5023 Excavator</td></tr></tbody></table>					RU00022-0...	Wacker Skid Steer	RU00022-0...	Wacker Skid Steer	RU00023	Ford 150 Trucks Group	RU00023-0...	Ford 150 Trucks	RU00023-0...	Ford 150 Trucks	RU00023-0...	Ford 150 Trucks	RU00024	Wacker 5023 Excavator Group	RU00024-0...	Wacker 5023 Excavator	RU00024-0...	Wacker 5023 Excavator	RU00024-0...	Wacker 5023 Excavator
RU00022-0...	Wacker Skid Steer																							
RU00022-0...	Wacker Skid Steer																							
RU00023	Ford 150 Trucks Group																							
RU00023-0...	Ford 150 Trucks																							
RU00023-0...	Ford 150 Trucks																							
RU00023-0...	Ford 150 Trucks																							
RU00024	Wacker 5023 Excavator Group																							
RU00024-0...	Wacker 5023 Excavator																							
RU00024-0...	Wacker 5023 Excavator																							
RU00024-0...	Wacker 5023 Excavator																							



ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

..... 4/8/2019

Functions Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Wacker 50Z3 Excavator Group	MONTH-PEND	0		

tions

Enter the text **1**.

..... 4/8/2019

Functions Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Wacker 50Z3 Excavator Group	MONTH-PEND	1		

tions

Click on the cell **Location Code**

When Locations are used, select the location the rental unit is being rented from.

19

wer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Status
Excavator Group	MONTH-PEND	1				4/8/2019

Look up value

Click on the link in cell **Code** with the value **EAST**

tions

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Status
Excavator Group	MONTH-PEND	1				4/8/2019
Excavator Group	MONTH-PEND	1				

Code ↑ Name

→ EAST East Warehouse

RE Select record "EAST" Inventory Items Rental Res

WEST West Warehouse

+ New

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line



ODT Rentals Online Help

Click on the cell **Rental Unit Price** with the value **0.00**

The Rental Unit Price defaults from the rental price card for the rental term on the line.

	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		4/8/2019	6/7/2019	0.00	0.00	0.00
		4/8/2019	6/7/2019	0.00	0.00	0.00

As the contract is for 2 rental periods, the Rental Return Date will be changed in this example.

Click on the cell **Rental Return Date** with the value **5/7/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
✓			4/8/2019	5/7/2019	0.00	0.00	
			4/8/2019	5/7/2019	Type the date in the format M/d/yyyy	0.00	

Click on the link in cell **Rental Return Date** with the value **5/7/2019**

	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
			4/8/2019	5/7/2019	0.00	0.00	
			4/8/2019	5/7/2019	Open the date picker	0.00	

Click on the link **Next**

	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
	4/8/2019	5/7/2019	0.00	0.00	0.00
	4/8/2019			0.00	0.00

May 2019

Su Mo Tu We Th Fr Sa Next

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31



ODT Rentals Online Help

Click on a date in the calendar

Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
	4/8/2019	5/7/2019	0.00	0.00	0.00
	4/8/2019			0.00	0.00

June 2019

Su	Mo	Tu	We	Th	Fr	Sa
					1	
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Group Code: Line Amount: Excl. Tax: Today Done Currency Code: Qty. to Ship:

Click on the cell **Rental Unit No.**

Rental Unit No.	Standard Text Code	Description
→ RU00024	:	Wacker 5023 Excavator Gro
	:	Wacker 5023 Excavator Gro

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

Rental Unit No.	Standard Text Code	Description
→ RU00024	:	Wacker 5023 Excavator Gro
	:	Wacker 5023 Excavator Gro

Look up value

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00024-001**

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name

Responsibility Center

Quote No.

RENTAL UNIT LIST

No. ↑	Description
→ RU00024-0...	Wacker 5023 Excavator
RU00024-	Select record "RU00024-001" vator

ODT Rentals Online Help

Click on the cell **Periodic Usage Enabled** with the value **on**

Manage Line Functions Fewer options							
Currency Code	Tax Group Code	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Period UOM Code	Periodic Usage Unit Price	Standby Unit Price	
	SUPPLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	
	SUPPLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	
		<input type="checkbox"/>	<input type="checkbox"/>		0.00	0.00	
		<input type="checkbox"/>	<input type="checkbox"/>				
</							

When the Periodic Usage Enabled field is flagged, this indicates that the Rental Periodic Usage Calendar must have the daily records updated to specify if Periodic Usage, and if applicable, Standby Charges are to be billed to the customer.

Click on the cell **Periodic Usage Unit Price** with the value **300.00**

The Periodic Usage Unit Price defaults from the rental price card for the rental term on the line and can be modified.

Options Fewer options							
Group Id	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Period UOM Code	Periodic Usage Unit Price	Standby Unit Price	Cust. Declines Damage Waiver	Qty. to Re
PLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	<input type="checkbox"/>	
PLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>		0.300.00	0.00	<input type="checkbox"/>	
	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>	

Click on the cell **Standby Unit Price** with the value **100.00**

The Standby Unit Price defaults from the rental price card for the rental term on the line and can be modified.

/er options							
Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Period UOM Code	Periodic Usage Unit Price	Standby Unit Price	Cust. Declines Damage Waiver	Qty. to Rent	Qty. or
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	<input type="checkbox"/>	0	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DAY	300.00	100.00	<input type="checkbox"/>	1	
<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>		

The following review of the Rental Amount Lines prior to entry of usage demonstrates that there will be no Periodic or Standby lines until usage is entered in the Rental Periodic Usage calendar.

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-001	⋮	Wacker 50Z3 Excavator	MONT



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

The screenshot shows the 'Rental Lines' navigation menu. The 'Rental Amount Lines' option is highlighted with a red box. Below the menu, a table displays rental details for 'RU00024' and 'RU00024-001', including the equipment name 'Wacker 5023 Excavator'.

Click on the cell **Type** with the value **Rental**

Note that the Rental Amount Lines contain on the records for the rental at 0.00 price. Periodic Usage and Standby Charge lines are only created when the calendar is updated.

The screenshot shows the 'VIEW - RENTAL LINE RENTAL AMOUNTS' table. The 'Type' column has two rows with the value 'Rental', which are highlighted with a red box. The table also shows 'Starting Date-Time' and 'Ending Date-Time' for each rental line.

Click on the button **Close**

The screenshot shows a modal window with a 'Close' button highlighted by a red box. The modal window displays a table with columns for '0.00', 'SUPPLIES', and dates '5/11/2019' and '6/7/2019'.

Click on the navigation menu item popup **Process**

The screenshot shows the 'Rental Contract - RC00005' screen in Dynamics 365 Business Central. The 'Process' button is highlighted with a red box. The screen displays the contract details, including the 'Sell-to Customer Name' (Adatum Corporation) and the 'Responsibility Center'.



Click on the link **Print**

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00005

Process Contract Rental Actions Navigate Fewer

Print... Print Proforma

Prepare to print the document. A report request window for the document

Sell-to Customer Name Adatum Corporation

Responsibility Center

Quote No.

Click on the toggle field Print Periodic/Standby Usage Prices

Number of Copies 0

Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Print Periodic/Standby Usage Prices **☒**

Filter: Rental Contract

× Document Type Rental Contract

× No. RC00005

Click on the button **Preview**

× Ship-to Code

+ Filter...

Send to... Print **Preview** Cancel

on Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax	Inc
	0		0.00	*	0.00	

Below is a screen shot, which displays how the Periodic Usage and Standby Charge pricing prints on the Rental Contract document.

Rental Contract Page: 1

Rental Contract Number: RC00005
Rental Contract Date: 4/8/2019

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Robert Townes
192 Market Square
GA 31772

P.O. Number: 10000
Customer ID: Peter Sadowski
SalesPerson: Peter Sadowski

Ship Via: Terms
1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU000024	Wacker 5023 Excavator Group		1		
RU000024-001	Wacker 5023 Excavator	5023-001	1		
Rental	Apr 08, 2019 to Jun 07, 2019		2 @ 0.00/Monthly Rental = 0.00		
Periodic Usage	Days in Use: 300.00/DAY Days on Standby: 100.00/DAY				

The following demonstrates the steps for shipping the unit and invoicing the first rental period.



Click on the field **Posting Date**

The screenshot shows a data entry form with several fields. The 'Posting Date' field is highlighted with a red rectangular box and contains the date '4/8/2019'. To the right of this field is a calendar icon. Below the highlighted field, there are two more rows, each with a date field containing '4/8/2019' and a calendar icon. The first row also has a text prompt 'Type the date in the format M/d/yyyy'. Above the highlighted field, there are two dropdown menus, the first of which is set to 'Adatum Corporation'. To the right of the form, there are labels for 'Ext', 'Ren', 'Dep', 'Cor', and 'Out'. At the bottom of the form, there are tabs labeled 'Page', 'Line', 'Functions', and 'Fewer options'.

Click on the navigation menu item popup **Rental**

The screenshot shows the 'Dynamics 365 Business Central' interface for a 'Rental Contract' with ID 'RC00005' and a work date of '4/8/2019'. The 'Rental' tab in the navigation bar is highlighted with a red box. Below the navigation bar, the 'General' section is visible, showing fields for 'Sell-to Customer Name' (set to 'Adatum Corporation') and 'Responsibility Center'. The background is a light gray.

Click on the navigation menu item **Ship Rentals**

The screenshot shows the same 'Rental Contract' page as before. In the 'Rental' tab, the 'Ship Rentals' button is highlighted with a red box. A tooltip is visible over this button, stating: 'Post the shipment of the rental units on the rental lines. A posted deliveries.' Other buttons in the same tab include 'Return Rentals', 'Bulk Returns', and 'Invo'. The background is a light gray.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with a question mark icon and the text 'Are you sure you want to Ship this rental contract?'. The 'Yes' button is highlighted with a red box. The 'No' button is also visible. In the background, a table is partially visible with columns for 'ITH-PEND', '1', 'EAST', and dates '4/8/2019' and '6/7/2019'. The background is a light gray.



ODT Rentals Online Help

Click on the button **OK**

Outstanding Amount

Shipment Posted Successfully.

OK

				Start	Return Date	Rental
1	EAST			4/8/2019	6/7/2019	
1	EAST			4/8/2019	6/7/2019	

Click on the field **Posting Date**

Adatum Corporation

4/8/2019

4/8/2019

4/8/2019

Type the date in t

Page Line Functions Fewer options

Click on the link **Open the date picker**

corporation

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

options

Click on the link **Next**

Adatum Corporation

4/8/2019

April 2019

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Line Function



ODT Rentals Online Help

Click on a date in the calendar

Select the date that the invoicing is to occur. In this example, the date selected is equal to the Billing Date on the Rental Amount Line for the first rental period.

Utility Center
Date 4/8/2019
May 2019
Su Mo Tu We Th Fr Sa
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31
Today Done
RU0024 Wacker 50Z3 Excavator Group MONTH-PEND 1 EA

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines Manage Line Functions Fewer options
Rental Unit No. Standard Text Code Description
→ RU00024 Wacker 50Z3 Excavator Gro
RU00024-001 Wacker 50Z3 Excavator
RU00024-001
Sales Lines Manage More options

Click on the navigation menu item popup **Line**

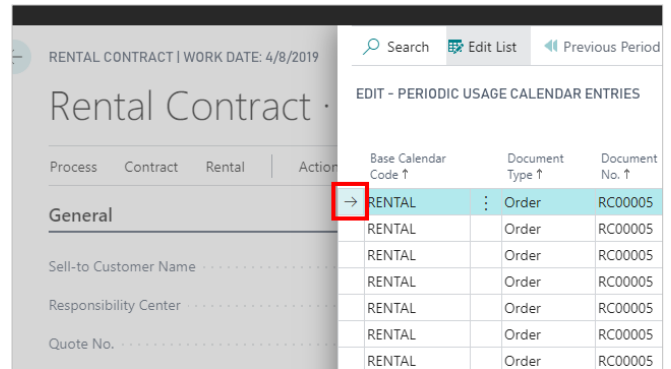
Posting Date 8/9/2020
Order Date 8/9/2020
Document Date 8/9/2020
Rental Lines Manage **Line** Functions Fewer options
Rental Unit No. Standard Text Code Description Rental Terms Code
RU00024 Wacker 50Z3 Excavator Group MONTH-PEN
→ RU00024-01 Wacker 50Z3 Excavator MONTH-PEN

Click on the navigation menu item **Periodic Usage Entries**

020 Contract Total
020 Outstanding Amount
options
Rental Value Entries Metered Usage Entries **Periodic Usage Entries** Item Tracking Lin
r Group MONTH-PEND 1 EAST 8/9/2020 9/8/2020
r MONTH-PEND 1 EAST 8/9/2020 9/8/2020

The following steps are the selection of a continuous range of days and the setting of the Usage Type to Periodic Usage.

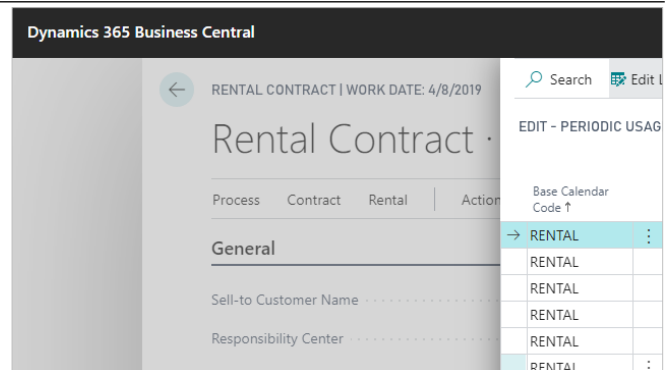
Click on **the first day to be included in the range of days.**



Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

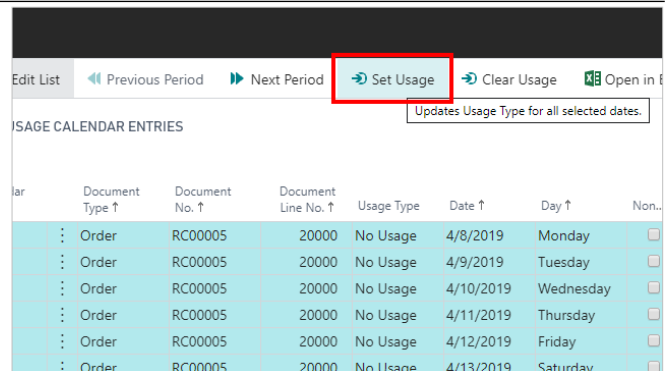
Press and hold the **Shift** key down.

Then select the last day to be included in the range.



Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

Click on the navigation menu item **Set Usage**



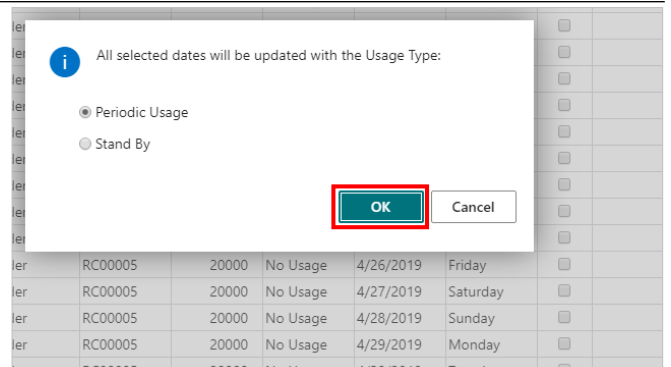
Updates Usage Type for all selected dates.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00005	20000	No Usage	4/8/2019	Monday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	4/9/2019	Tuesday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	4/10/2019	Wednesday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	4/11/2019	Thursday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	4/12/2019	Friday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	4/13/2019	Saturday	<input type="checkbox"/>

The default selection on the Set Usage page is Periodic Usage.

As this is the selection wanted for the highlighted range, select OK.

Click on the button **OK**



All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Stand By

OK Cancel

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
er	RC00005	20000	No Usage	4/26/2019	Friday	<input type="checkbox"/>
er	RC00005	20000	No Usage	4/27/2019	Saturday	<input type="checkbox"/>
er	RC00005	20000	No Usage	4/28/2019	Sunday	<input type="checkbox"/>
er	RC00005	20000	No Usage	4/29/2019	Monday	<input type="checkbox"/>
er	RC00005	20000	No Usage	4/30/2019	Tuesday	<input type="checkbox"/>

The next steps demonstrate the selection of non-continuous days for setting the Usage Type to Standby Charge.

ODT Rentals Online Help

Click on **the first day** that is to have the Usage Type set to Standby Charge.

	Process	Contract	Rental	Action
General				
Sell-to Customer Name		RENTAL	Order	RC000005
Responsibility Center		RENTAL	Order	RC000005
Quote No.		RENTAL	Order	RC000005
Posting Date		RENTAL	Order	RC000005
Order Date		RENTAL	Order	RC000005
Document Date		RENTAL	Order	RC000005
		RENTAL	Order	RC000005
		RENTAL	Order	RC000005
		RENTAL	Order	RC000005
		RENTAL	Order	RC000005

Press and hold the **Ctrl** key down.
Click on **the next day that is to have the Usage Type set to Standby Charge.**

Posting Date		→ RENTAL	:	Order	RC00005
		RENTAL		Order	RC00005
Order Date		RENTAL		Order	RC00005
		RENTAL		Order	RC00005
Document Date		RENTAL		Order	RC00005
		RENTAL		Order	RC00005
Rental Lines	Manage	Line	Fur	RENTAL	: Order RC00005
				RENTAL	Order RC00005
Rental Unit No.	Standard Text Code		Des	RENTAL	Order RC00005
RU00024			Wa	RENTAL	Order RC00005
→ RU00024-001	:		W	RENTAL	Order RC00005
				RENTAL	Order RC00005
				RENTAL	Order RC00005

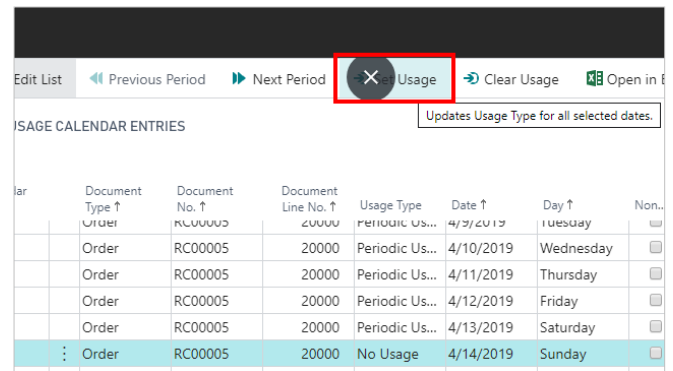
Press and hold the **Ctrl** key down.
Click on the **next day that is to have the Usage Type set to Standby Charge.**

[illegible]

Press and hold the **Ctrl** key down.
Click on the **next day that is to have the Usage Type set to Standby Charge.**

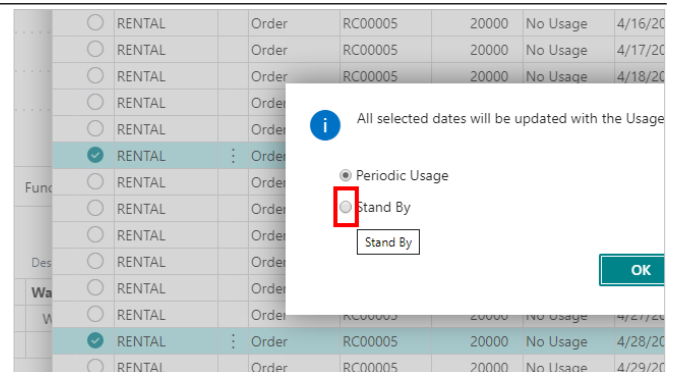
[illegible]

Click on the navigation menu item **Set Usage**



Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00005	20000	Periodic Us...	4/10/2019	Wednesday	
Order	RC00005	20000	Periodic Us...	4/11/2019	Thursday	
Order	RC00005	20000	Periodic Us...	4/12/2019	Friday	
Order	RC00005	20000	Periodic Us...	4/13/2019	Saturday	
Order	RC00005	20000	No Usage	4/14/2019	Sunday	

Click on the field **Standby**

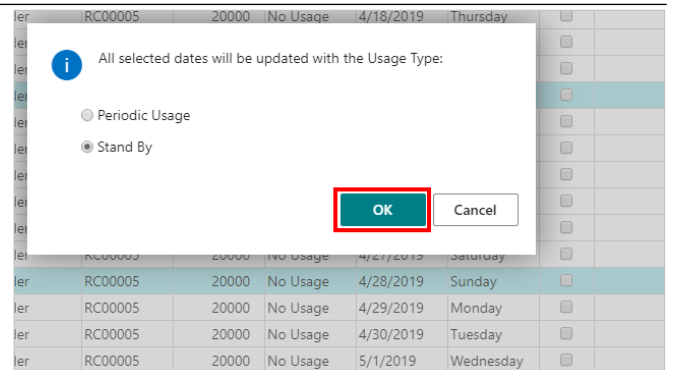


All selected dates will be updated with the Usage Type:

☐ Periodic Usage
☒ Stand By

OK

Click on the button **OK**



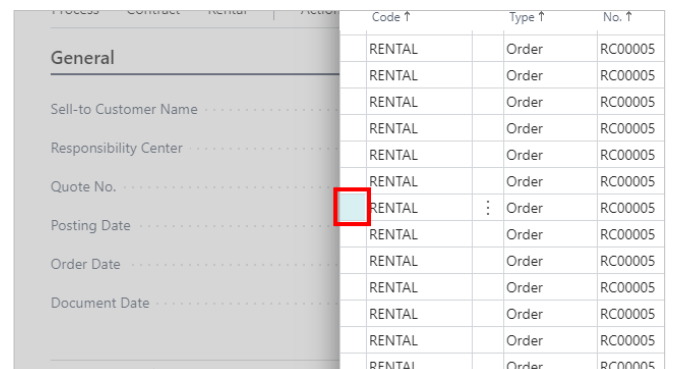
All selected dates will be updated with the Usage Type:

☐ Periodic Usage
☒ Stand By

OK Cancel

The following steps demonstrate the selection of additional date ranges and the setting of Usage Type to Periodic Usage.

Click on **the first day to be included in the range of days**.



Code ↑	Type ↑	No. ↑
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005



ODT Rentals Online Help

Press and hold the **Ctrl** key down.

Click on **the last day to be included in the range of days.**

Responsibility Center	RENTAL	Order	RC00005
Quote No.	RENTAL	Order	RC00005
Posting Date	→ RENTAL	Order	RC00005
Order Date	RENTAL	Order	RC00005
Document Date	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005

Click on the navigation menu item **Set Usage**

Edit List

Previous Period

Next Period

Set Usage

Clear Usage

Open in F

Updates Usage Type for all selected dates.

USAGE CALENDAR ENTRIES

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non..
Order	RC00005	20000	Periodic Us...	4/9/2019	Wednesday	
Order	RC00005	20000	Periodic Us...	4/11/2019	Thursday	
Order	RC00005	20000	Periodic Us...	4/12/2019	Friday	
Order	RC00005	20000	Periodic Us...	4/13/2019	Saturday	
Order	RC00005	20000	Stand By	4/14/2019	Sunday	

Click on the button **OK**

RC00005	20000	No Usage	4/18/2019	Thursday	
All selected dates will be updated with the Usage Type:					
<input checked="" type="radio"/> Periodic Usage					
<input type="radio"/> Stand By					
OK Cancel					
RC00005	20000	No Usage	4/27/2019	Saturday	
RC00005	20000	Stand By	4/28/2019	Sunday	
RC00005	20000	No Usage	4/29/2019	Monday	
RC00005	20000	No Usage	4/30/2019	Tuesday	
RC00005	20000	No Usage	5/1/2019	Wednesday	

Click on **the first day to be included in the range of days.**

Process	Contract	Rental	Action	Base Calendar Code ↑	Document Type ↑	Document No. ↑
General						
Sell-to Customer Name						
Responsibility Center						
Quote No.						
Posting Date						
Order Date						
Document Date						
→ RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						
RENTAL Order RC00005						

ODT Rentals Online Help

Press and hold the **Shift** key down.

Click on **the last day** to be included in the range of days.

Responsibility Center					RENTAL		Order	RC00005
Quote No.					RENTAL		Order	RC00005
Posting Date				→	RENTAL	:	Order	RC00005
Order Date					RENTAL		Order	RC00005
Document Date					RENTAL		Order	RC00005
					RENTAL		Order	RC00005
					RENTAL	:	Order	RC00005
					RENTAL		Order	RC00005
Rental Lines				Manage	Line	Func		
Rental Unit No.		Standard Text Code		Description				
RU00024				Wa				
					RENTAL		Order	RC00005
					RENTAL		Order	RC00005
					RENTAL		Order	RC00005
					RENTAL		Order	RC00005
					RENTAL		Order	RC00005

Click on the navigation menu item **Set Usage**

Usage Calendar Entries

Updates Usage Type for all selected dates.

Document Line No. ↑	Document No. ↑	Usage Type	Date ↑	Day ↑	Non...
20000	RC00005	Periodic Us...	4/7/2019	Tuesday	
20000	RC00005	Periodic Us...	4/11/2019	Thursday	
20000	RC00005	Periodic Us...	4/12/2019	Friday	
20000	RC00005	Periodic Us...	4/13/2019	Saturday	
20000	RC00005	Stand By	4/14/2019	Sunday	

Click on the button **OK**

All selected dates will be updated with the Usage Type:

- ☒ Periodic Usage
- ☐ Stand By

OK Cancel

Click on **the first day** to be included in the range of days.

Posting Date				RENTAL	Order	RC00005
Order Date				RENTAL	Order	RC00005
Document Date				RENTAL	Order	RC00005
				RENTAL	Order	RC00005
				RENTAL	Order	RC00005
				RENTAL	Order	RC00005
Rental Lines				Manage	Line	Function
				RENTAL	Order	RC00005
				RENTAL	:	Order
Rental Unit No.				Standard Text Code	Description	
RU00024					Waiver	
→ RU00024-001				:	Waiver	

ODT Rentals Online Help

Press and hold the **Shift** key down.

Click on **the last day to be included in the range of days.**

[illegible]

Click on the navigation menu item **Set Usage**

[Edit List](#)
[◀ Previous Period](#)
[▶ Next Period](#)
✕ Usage
[↻ Clear Usage](#)
[🔍 Open in F](#)

Updates Usage Type for all selected dates.

Usage Calendar Entries																																																								
<table border="1"> <thead> <tr> <th>Order</th> <th>Document Type ↑</th> <th>Document No. ↑</th> <th>Document Line No. ↑</th> <th>Usage Type</th> <th>Date ↑</th> <th>Day ↑</th> <th>Non...</th> </tr> </thead> <tbody> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/8/2019</td> <td>Monday</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/9/2019</td> <td>Tuesday</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/10/2019</td> <td>Wednesday</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/11/2019</td> <td>Thursday</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/12/2019</td> <td>Friday</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Order</td> <td>RC00005</td> <td>20000</td> <td>Periodic Us...</td> <td>4/13/2019</td> <td>Saturday</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Order	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...		Order	RC00005	20000	Periodic Us...	4/8/2019	Monday	<input type="checkbox"/>		Order	RC00005	20000	Periodic Us...	4/9/2019	Tuesday	<input type="checkbox"/>		Order	RC00005	20000	Periodic Us...	4/10/2019	Wednesday	<input type="checkbox"/>		Order	RC00005	20000	Periodic Us...	4/11/2019	Thursday	<input type="checkbox"/>		Order	RC00005	20000	Periodic Us...	4/12/2019	Friday	<input type="checkbox"/>		Order	RC00005	20000	Periodic Us...	4/13/2019	Saturday	<input type="checkbox"/>
Order	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...																																																	
	Order	RC00005	20000	Periodic Us...	4/8/2019	Monday	<input type="checkbox"/>																																																	
	Order	RC00005	20000	Periodic Us...	4/9/2019	Tuesday	<input type="checkbox"/>																																																	
	Order	RC00005	20000	Periodic Us...	4/10/2019	Wednesday	<input type="checkbox"/>																																																	
	Order	RC00005	20000	Periodic Us...	4/11/2019	Thursday	<input type="checkbox"/>																																																	
	Order	RC00005	20000	Periodic Us...	4/12/2019	Friday	<input type="checkbox"/>																																																	
	Order	RC00005	20000	Periodic Us...	4/13/2019	Saturday	<input type="checkbox"/>																																																	

Click on the button **OK**

Click on **the first day** to be included in the range of days.

[illegible]

Press and hold the **Shift** key down.

Click on **the last day to be included in the range of days.**

RENTAL	Order	RC00005
RENTAL	Order	RC00005
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

Click on the navigation menu item **Set Usage**

Edit List	Previous Period	Next Period	Set Usage	Clear Usage	Open in F
-----------	-----------------	-------------	------------------	-------------	-----------

Updates Usage Type for all selected dates.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
Order	RC00005	20000	Periodic Us...	4/9/2019	Tuesday	
Order	RC00005	20000	Periodic Us...	4/10/2019	Wednesday	
Order	RC00005	20000	Periodic Us...	4/11/2019	Thursday	
Order	RC00005	20000	Periodic Us...	4/12/2019	Friday	
Order	RC00005	20000	Periodic Us...	4/13/2019	Saturday	
Order	RC00005	20000	Stand By	4/14/2019	Sunday	











Click on the button **OK**

<div> <i>i</i> All selected dates will be updated with the Usage Type: <input checked="" type="radio"/> Periodic Usage <input type="radio"/> Stand By </div>						
<div> <div>OK</div> <div>Cancel</div> </div>						

Order	RC00005	20000	No Usage	4/18/2019	Thursday	
Order	RC00005	20000	No Usage	4/19/2019	Friday	
Order	RC00005	20000	No Usage	4/20/2019	Saturday	
Order	RC00005	20000	No Usage	4/21/2019	Sunday	
Order	RC00005	20000	No Usage	4/22/2019	Monday	
Order	RC00005	20000	No Usage	4/23/2019	Tuesday	
Order	RC00005	20000	No Usage	4/24/2019	Wednesday	
Order	RC00005	20000	No Usage	4/25/2019	Thursday	
Order	RC00005	20000	No Usage	4/26/2019	Friday	
Order	RC00005	20000	No Usage	4/27/2019	Saturday	
Order	RC00005	20000	Stand By	4/28/2019	Sunday	
Order	RC00005	20000	No Usage	4/29/2019	Monday	
Order	RC00005	20000	No Usage	4/30/2019	Tuesday	
Order	RC00005	20000	No Usage	5/1/2019	Wednesday	

The following demonstrates the setting of the Usage Type to Periodic Usage on the final day that will be set to Periodic Usage by selecting the option in the Usage Type field.

Click on the cell **Usage Type** with the value **No Usage**

	Order	RC00005	20000	Stand by	4/20/2019	Sunday		
	Order	RC00005	20000	Periodic Usa...	4/29/2019	Monday		
	Order	RC00005	20000	Periodic Usa...	4/30/2019	Tuesday		
	Order	RC00005	20000	Periodic Usa...	5/1/2019	Wednesday		
	Order	RC00005	20000	Periodic Usa...	5/2/2019	Thursday		
	Order	RC00005	20000	Periodic Usa...	5/3/2019	Friday		
:	Order	RC00005	20000	Periodic Usage	5/4/2019	Saturday		
	Order	RC00005	20000	Stand By	5/5/2019	Sunday		
:	Order	RC00005	20000	No Usage	5/6/2019	Monday		
	Order	RC00005	20000	No Usa	No Usage	2019	Tuesday	



ODT Rentals Online Help

Click on the item **Periodic Usage** in the list

Order	RC00005	20000	Stand By	4/28/2019	Sunday	
Order	RC00005	20000	Periodic Usa...	4/29/2019	Monday	
Order	RC00005	20000	Periodic Usa...	4/30/2019	Tuesday	
Order	RC00005	20000	Periodic Usa...	5/1/2019	Wednesday	
Order	RC00005	20000	Periodic Usa...	5/2/2019	Thursday	
Order	RC00005	20000	Periodic Usa...	5/3/2019	Friday	
Order	RC00005	20000	Periodic Usa...	5/4/2019	Saturday	
Order	RC00005	20000	Stand By	5/5/2019	Sunday	
Order	RC00005	20000	No Usage	5/6/2019	Monday	
Order	RC00005	20000	Periodic Usage	5/7/2019	Tuesday	
			Stand By			

Click on the button **Close**

20/2019	Sunday				
29/2019	Monday				
30/2019	Tuesday				
1/2019	Wednesday				
2/2019	Thursday				
3/2019	Friday				
4/2019	Saturday				
5/2019	Sunday				
6/2019	Monday				
7/2019	Tuesday				
Close					

NOTE

For the rental period only those days that Periodic Usage or Standby Charges, if applicable, that are to be billed to the customer need to have the Usage Type set.

Days can be left as No Usage, which are not billable to the customer.

The following demonstrates the review of the Rental Amount Lines after setting the Usage Type on the calendar.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines				Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description					
RU00024		Wacker 50Z3 Excavator Gro					
→ RU00024-001		Wacker 50Z3 Excavator					
				Look up value			
Sales Lines				Manage	More options		

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	5/7/2019
Order Date	4/8/2019
Document Date	5/7/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-0 ...		Wacker 50Z3 Excavator	MONT



Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019
Order Date 4/8/2019
Document Date 5/7/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

No. View the rental amount line records that will be billed for the sele

RU00024		Wacker 50Z3 Excavator Gro
→ RU00024-001	:	Wacker 50Z3 Excavator

Click on the cell **Type** with the value **Periodic Usage**

Search Open in Excel

VIEW - RENTAL LINE RENTAL AMOUNTS

Type ↑	Starting Date-Time ↑	Ending Date-Time ↑
Periodic Usage	4/8/2019 12:00 AM	4/8/2019 11:59 PM
Periodic Usage	Periodic Usage 2019 12:00 AM	4/9/2019 11:59 PM
Periodic Usage	4/10/2019 12:00 AM	4/10/2019 11:59 PM
Periodic Usage	4/11/2019 12:00 AM	4/11/2019 11:59 PM
Periodic Usage	4/12/2019 12:00 AM	4/12/2019 11:59 PM

Click on the cell **Billing Date** with the value **4/8/2019**

Amount Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.
306.00	SUPPLIES	4/8/2019	<input checked="" type="checkbox"/>	
306.00	SUPPLIES	4/9/2019	<input type="checkbox"/>	
306.00	SUPPLIES	4/10/2019	<input type="checkbox"/>	
306.00	SUPPLIES	4/11/2019	<input type="checkbox"/>	
306.00	SUPPLIES	4/12/2019	<input type="checkbox"/>	

In the Rental Amount Lines there is a record for each day with the Billing Date set to that date. This provides the ability to invoice Periodic Usage and Standby Charges at any time during a rental period.

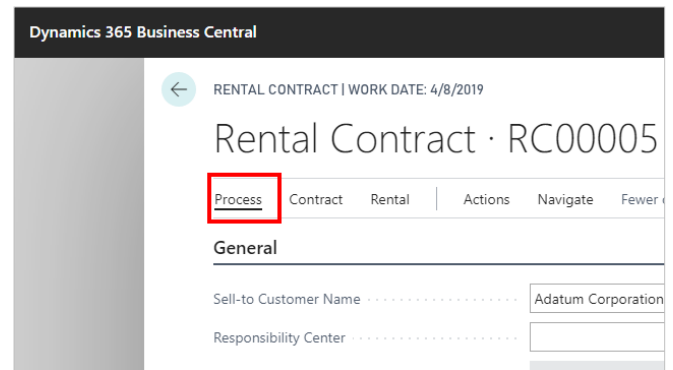
Click on the button **Close**

306.00	SUPPLIES	4/23/2019	<input type="checkbox"/>
306.00	SUPPLIES	4/24/2019	<input type="checkbox"/>
306.00	SUPPLIES	4/25/2019	<input type="checkbox"/>
306.00	SUPPLIES	4/26/2019	<input type="checkbox"/>
306.00	SUPPLIES	4/27/2019	<input type="checkbox"/>
102.00	SUPPLIES	4/28/2019	<input type="checkbox"/>
306.00	SUPPLIES	4/29/2019	<input type="checkbox"/>

Close

The following demonstrates the previewing of the Proforma Invoice for the first rental period, first with the detailed usage printing, and then with the details hidden.

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000005

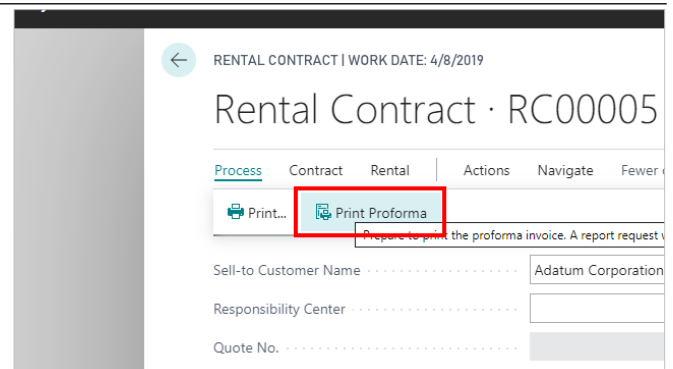
Process Contract Rental Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Print Proforma**



RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000005

Process Contract Rental Actions Navigate Fewer options

Print... Print Proforma

Prepare to print the proforma invoice. A report request will be generated.

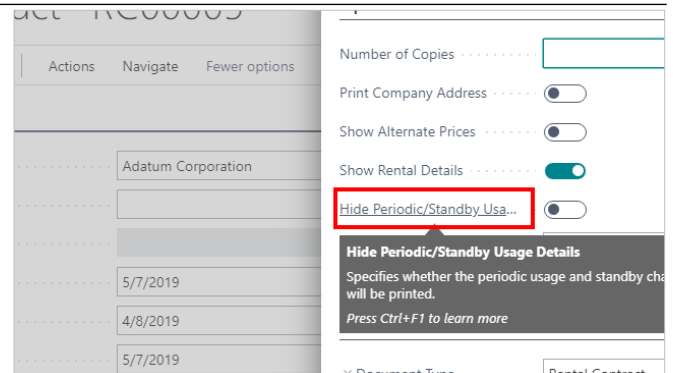
Sell-to Customer Name Adatum Corporation

Responsibility Center

Quote No.

Click on the link **Hide Periodic/Standby Usage Details**

In this example, the Hide Periodic/Standby Details will not be enabled, to show how the invoice document would print without it being enabled.



Actions Navigate Fewer options

Number of Copies 0

Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage Details ☐

Hide Periodic/Standby Usage Details

Specifies whether the periodic usage and standby charges will be printed.

Press Ctrl+F1 to learn more

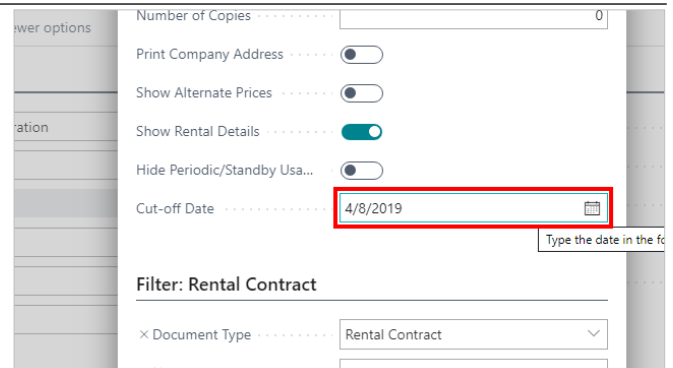
5/7/2019

4/8/2019

5/7/2019

X Document Type Rental Contract

Click on the field **Cut-off Date**



Number of Copies 0

Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Usage Details ☐

Cut-off Date 4/8/2019

Filter: Rental Contract

X Document Type Rental Contract

X No. RC000005

The users Work Date in My Settings, automatically defaults to the Cut-off Date field, until the first time the Print Proforma is ran.

Then the date that was entered in this field the last time the Print Proforma was ran, is saved in the page, and must be updated when subsequently running the Print Proforma.

This can be overridden to specify what Cut-off Date the Proforma Invoice should print the billing up to.

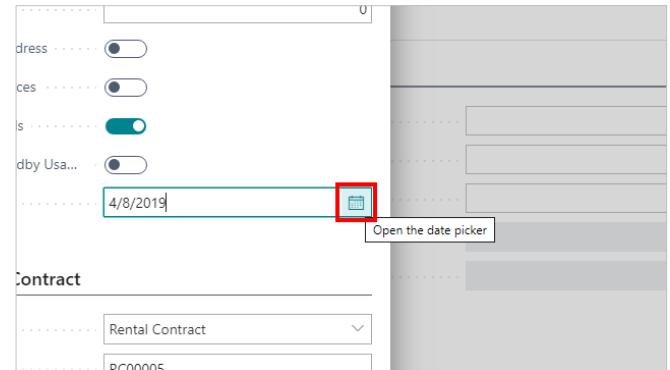
When on Rental Management Setup, the field, Default Blank Return Date is not enabled, then the Cut-off Date entry for the Proforma is restricted to the Rental Amount Lines, which are available for invoicing.

ODT Rentals Online Help

When the Rental Management Setup field, Default Blank Return Date is enabled, then the Cut-off Date for the Proforma can be any date subsequent to any Rental Amount Lines, which have been invoiced, and are marked as Billed. The Proforma prints based only on full rental periods.

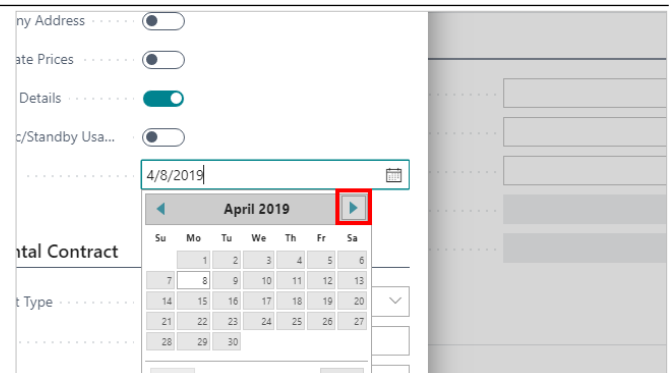
Should a date be entered that is earlier than the Billing Date on the Rental Amount lines which have not been invoiced, then a message, "Nothing to Invoice", will be displayed.

Click on the link **Open the date picker**



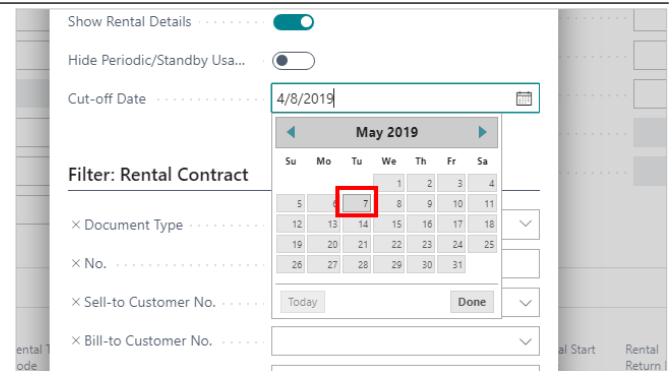
The screenshot shows a form with several toggle switches and a date field. The date field contains '4/8/2019'. A red box highlights a calendar icon button next to the date field, with a tooltip that says 'Open the date picker'.

Click on the link **Next**



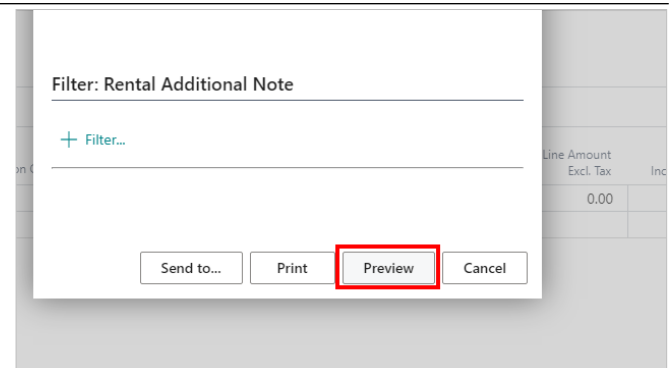
The screenshot shows the same form as before, but now a calendar is open. The calendar is for April 2019. A red box highlights the 'Next' button (a right-pointing arrow) in the calendar header.

Click on a date in the calendar



The screenshot shows the calendar for May 2019. A red box highlights the date '7' (May 7th) in the calendar grid.

Click on the button **Preview**



The screenshot shows a modal window titled 'Filter: Rental Additional Note'. It has a '+ Filter...' button and a list of filters. At the bottom, there are four buttons: 'Send to...', 'Print', 'Preview', and 'Cancel'. The 'Preview' button is highlighted with a red box.



The following picture shows how the Periodic Usage and Standby Charges print, when the Hide Periodic/Standby Details is not enabled.

CROWNUS Rentals, Inc.

7122 South Ashford Street

Westminster

Atlanta, GA 31172

Rental Proforma

Page: 1

Rental Contract Number: RC00005

Rental Proforma Date: 5/7/2019

Sell To:

Adatum Corporation

Robert Townes

192 Market Square

, GA 31172

Ship To:

Adatum Corporation

Robert Townes

192 Market Square

, GA 31172

P.O. Number

Customer ID

SalesPerson

10000

Peter Sadowski

Ship Via

Terms

1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU000024	Wacker 5023 Excavator Group		1		
RU000024-001	Wacker 5023 Excavator	5023-001	1		7,900.00
Rental	Apr 08, 2019 to May 07, 2019		1 @ 0.00/Monthly Rental = 0.00		
Periodic Usage					
Days in Use	Apr 08, 2019		1 @ 300.00/DAY = 300.00		
	Apr 09, 2019		1 @ 300.00/DAY = 300.00		
	Apr 10, 2019		1 @ 300.00/DAY = 300.00		
	Apr 11, 2019		1 @ 300.00/DAY = 300.00		
	Apr 12, 2019		1 @ 300.00/DAY = 300.00		
	Apr 13, 2019		1 @ 300.00/DAY = 300.00		
	Apr 15, 2019		1 @ 300.00/DAY = 300.00		
	Apr 16, 2019		1 @ 300.00/DAY = 300.00		
	Apr 17, 2019		1 @ 300.00/DAY = 300.00		
	Apr 18, 2019		1 @ 300.00/DAY = 300.00		
	Apr 19, 2019		1 @ 300.00/DAY = 300.00		
	Apr 20, 2019		1 @ 300.00/DAY = 300.00		
	Apr 22, 2019		1 @ 300.00/DAY = 300.00		
	Apr 23, 2019		1 @ 300.00/DAY = 300.00		
	Apr 24, 2019		1 @ 300.00/DAY = 300.00		
	Apr 25, 2019		1 @ 300.00/DAY = 300.00		
	Apr 26, 2019		1 @ 300.00/DAY = 300.00		
	Apr 27, 2019		1 @ 300.00/DAY = 300.00		
	Apr 29, 2019		1 @ 300.00/DAY = 300.00		
	Apr 30, 2019		1 @ 300.00/DAY = 300.00		
	May 01, 2019		1 @ 300.00/DAY = 300.00		
	May 02, 2019		1 @ 300.00/DAY = 300.00		
	May 03, 2019		1 @ 300.00/DAY = 300.00		
	May 04, 2019		1 @ 300.00/DAY = 300.00		
	May 06, 2019		1 @ 300.00/DAY = 300.00		
Days on Standby	Apr 14, 2019		1 @ 100.00/DAY = 100.00		
	Apr 21, 2019		1 @ 100.00/DAY = 100.00		
	Apr 28, 2019		1 @ 100.00/DAY = 100.00		

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000005

Process

ContractRentalActionsNavigateFewer

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Print Proforma**

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000005

Process

ContractRentalActionsNavigateFewer

Print...

Print Proforma

Prepare to print the proforma invoice. A report

Sell-to Customer Name Adatum Corporation

Responsibility Center

Quote No.



ODT Rentals Online Help

Click on the toggle field Print Company Address

Use default values from: Last used options and filters

Options

Number of Copies: 0

Print Company Address: ☒

Show Alternate Prices: ☐

Show Rental Details: ☒

Hide Periodic/Standby Usage Det...: ☐

Cut-off Date: 5/7/2019

Click on the toggle field Show Alternate Prices

Options

Number of Copies: 0

Print Company Address: ☒

Show Alternate Prices: ☒

Show Rental Details: ☒

Hide Periodic/Standby Usage Det...: ☐

Cut-off Date: 5/7/2019

Click on the toggle field Hide Periodic/Standby Usage Details

Number of Copies: 0

Print Company Address: ☒

Show Alternate Prices: ☒

Show Rental Details: ☒

Hide Periodic/Standby Usage Det...: ☒

Cut-off Date: 5/7/2019

Filter: Rental Contract

X Document Type: Rental Contract

Click on the field **Cut-off Date**

Number of Copies: 0

Print Company Address: ☒

Show Alternate Prices: ☒

Show Rental Details: ☒

Hide Periodic/Standby Usage Det...: ☒

Cut-off Date: 5/7/2019

Filter: Rental Contract

X Document Type: Rental Contract

Rental Return Date: 6/7/2019



Click on the button **Preview**

Customer No.
Customer No.
Address
Total Additional Note
Send to... Print **Preview** Cancel

The following picture shows how the Periodic Usage and Standby Charges print, when the Hide Periodic/Standby Details is enabled, which summarizes the Periodic Usage and Standby Charge days to be billed.

Under the Periodic Usage caption, the labeling for Periodic Usage and Standby Charge comes from Rental Management Setup.

The date range that prints for Periodic Usage, starts with the first day in the calendar that has the Usage Type was set to Periodic Usage, and ends with the last day in the calendar that has the Usage Type of Periodic Usage.

The date range for Standby Charges is printed in the same manner.

Rental Proforma Page: 1
Rental Contract Number: RC00005
Rental Proforma Date: 5/7/2019

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number: 10000
Customer ID: Peter Sadow
Salesperson:
Ship Via:
Terms: 1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00024	Wacker 5023 Excavator Group	5023-001	1		
RU00024-001	Wacker 5023 Excavator		1		7,900.00
Rental	Apr 08, 2019 to May 07, 2019		1 @ 0.00/Monthly Rental = 0.00		
Periodic Usage	Apr 08, 2019 to May 06, 2019		25 @ 300.00/DAY = 7,500.00		
Days in Use	Apr 14, 2019 to May 05, 2019		4 @ 100.00/DAY = 400.00		
Days on Standby					
Amount Subject to Sales Tax USD 7,900.00					Subtotal: 7,900.00
Amount Exempt from Sales Tax USD 0.00					Total Sales Tax: 158.00
					Total USD: 8,058.00

The following demonstrates the invoicing of the first rental period, the review of the calendar entries and Rental Value Entries.

Click on the field **Posting Date**

For this example the Posting Date is set to the last day in the first rental period, which matches the Billing Date in the Rental Amount Lines for the first period.

Adatum Corporation
5/7/2019
4/8/2019
5/7/2019



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000005

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Invoice**

CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC000005

Contract **Rental** Actions Navigate Fewer options

Rentals **Invoice**

Customer Name Adatum Corporation

Responsibility Center

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

2019	6/7/2019	0.00	0.00	0.00	SUPPLIES
2019	6/7/2019	0.00	0.00	0.00	SUPPLIES

Click on the button **Yes**

Outstanding Amount

There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

ITH-PEND	1	EAST		4/8/2019	6/7/2019
ITH-PEND	1	EAST		4/8/2019	6/7/2019



Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

				Start	Rental Return Date	Rental
1	EAST			4/8/2019	6/7/2019	
1	EAST			4/8/2019	6/7/2019	

The following is a review of the Rental Amount Lines, after the posting of the invoice.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description
→ RU00024	:	Wacker 50Z3 Excavator Gro
RU00024-001	:	Wacker 50Z3 Excavator

Sales Lines | Manage | More options

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-001	:	Wacker 50Z3 Excavator	MONT

Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/7/2019

Order Date 4/8/2019

Document Date 5/7/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

No. view the rental amount line records that will be billed for the

RU00024		Wacker 50Z3 Excavator Gro
→ RU00024-001	:	Wacker 50Z3 Excavator

ODT Rentals Online Help

Click on the cell **Billed** with the value **on**

Note that all the days that have the setting of Periodic Usage or Standby now have the Billed field flagged, which indicates they have been invoiced.

2019	Thursday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Friday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Saturday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Sunday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Monday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Wednesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Thursday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Friday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Saturday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Sunday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Monday	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2019	Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The following is a review of the Rental Value Entries, after the posting of the invoice.

Click on the navigation menu item popup **Line**

Quote No.	5/7/2019
Posting Date	5/7/2019
Order Date	4/8/2019
Document Date	5/7/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-001		Wacker 50Z3 Excavator	MONT

Click on the navigation menu item **Rental Value Entries**

Posting Date	5/7/2019
Order Date	4/8/2019
Document Date	5/7/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Amount Lines	Rental Ledger Entries	Rental Value Entries	Rental Usage Track
---------------------	-----------------------	-----------------------------	--------------------

No.	Code	Description	View the rental value entries for the
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEND 1
RU00024-001		Wacker 50Z3 Excavator	MONTH-PEND 1

Click on the cell **Posting Date** with the value **5/7/2019**

For each Rental Amount Line for Periodic Usage and Standby Charges, a Rental Value Entry with the corresponding type is created when the invoice is posted.

Search	Process	Rental	Open in Excel	More options
--------	---------	--------	---------------	--------------

VIEW - RENTAL VALUE ENTRIES				
Posting Date ↑	Entry Type ↑	Rental Doc. No. ↑	No.	Serial No.
5/7/2019	Rental	RC00005	RU00024-001	50Z3-001
5/7/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/7/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/7/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/7/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001



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Click on the button **Close**

300.00	300.00	306.00	36
300.00	300.00	306.00	37
300.00	300.00	306.00	38
300.00	300.00	306.00	39
300.00	300.00	306.00	40
300.00	300.00	306.00	41
300.00	300.00	306.00	42
			<div>Close</div>

The following demonstrates the reviewing of the Posted Rental Invoice.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00005

Process Contract **Rental** Actions Navigate Fewer op

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

Click on the navigation menu item **Posted Invoices**

✎ + 🗑

nt 📄 Posted Deliveries 📄 Posted Returns **📄 Posted Invoices**

View the history of posted sales invoice:

External Document No.

Rental Terms Code 10000

Deposit Amount

Click on the link in cell **No.** with the value **RI00006**

← ← POSTED SALES INVOICES | WORK DATE: 8/6/2019

🔍 Search Manage Invoice Navigate Correct Print/Se

No. Customer No. Customer

RI00006 : 10000 Adatum Corporation

Open record "RI00006"



Click on the navigation menu item popup **Actions**

WORK DATE: 8/6/2019

Adatum Corporation

Print/Send Navigate Electronic Document **Actions** Navigate Fewer options

Line Fewer options

Click on the navigation menu item **Print Rental...**

ESTIMATED SALES INVOICE | WORK DATE: 8/6/2019

RI00006 · Adatum Corporation

Print/Send Navigate Electronic Document **Actions** Navigate Fewer options

Electronic Document Send... Print... **Print Rental...** Email Navigate

Prepare to print the document. A report requires...

Manage Line Fewer options

Type	No.	Description	Quantity
------	-----	-------------	----------

Click on the toggle field Hide Periodic/Standby Usage Details

Options

Number of Copies

Print Company Address ☐

Show Rental Details ☒

Hide Periodic/Standby Usage ☒

Filter: Sales Invoice

× No. RI00006

× Sell-to Customer No.

Click on the button **Preview**

× No. Printed

+ Filter...

Send to... Print **Preview** Cancel

1	300.00	ATLANTA, GA	SUPPLIES
1	300.00	ATLANTA, GA	SUPPLIES
1	300.00	ATLANTA, GA	SUPPLIES
1	300.00	ATLANTA, GA	SUPPLIES
1	300.00	ATLANTA, GA	SUPPLIES



ODT Rentals Online Help

The picture below displays the Posted Rental Invoice when the Hide Periodic/Standby Details is enabled.

RENTAL INVOICE Page: 1

CROWNUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Invoice Number: R100006
Invoice Date: 5/7/2019

Bill To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772
USA

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772
USA

Customer ID: 10000
P.O. Number: R000005
Rental Contract No.: Peter Sadow
Sales Person: 6/7/2019
Due Date: 1 Month/2% 8 days
Terms:

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
Rental Charges:					
RJ00024-001 Wacker 5023 Excavator			Serial No.: 5023-001		7,900.00
Rental	Apr 08, 2019 to May 07, 2019		1 @ 0.00 /Monthly Rental = 0.00		
Periodic Usage					
Days in Use	Apr 08, 2019 to May 06, 2019		25 @ 300.00 /Daily Rental = 7,500.00		
Days on Standby	Apr 14, 2019 to May 05, 2019		4 @ 100.00 /Daily Rental = 400.00		
				Subtotal:	7,900.00
Amount Subject to Sales Tax USD				7,900.00	
Amount Exempt from Sales Tax:				0.00	
				Total Sales Tax:	158.00
				Total USD:	8,058.00

Click on the back button

Sandbox

Close

Click on the back button

Dynamics 365 Business Central

← POSTED SALES INVOICES | WORK DATE: 8/6/2019

Search Manage Invoice Navigate Correct Print/Se

No.	Customer No.	Customer
RJ00006	10000	Adatum Corporation

When a Rental Unit is linked to a Fixed Asset, and an invoice with Periodic Usage and Standby Charges has been posted, then on the Rental Unit card, the revenue will be displayed in the respective fields on the Rental Statistics.

The second rental period processing entails the same steps of updating the Periodic Usage Calendar Entries, changing the Posting Date to the end of the period, and then invoicing the contract.

The following demonstrates the updating of the calendar for the second rental period.



Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00024		Wacker 50Z3 Excavator Gro		
→ RU00024-001	:	Wacker 50Z3 Excavator		

Sales Lines	Manage	More options
-------------	--------	--------------

Click on the navigation menu item popup **Line**

Posting Date	8/9/2020
Order Date	8/9/2020
Document Date	8/9/2020

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEN	
→ RU00024-001	:	Wacker 50Z3 Excavator	MONTH-PEN	

Click on the navigation menu item **Periodic Usage Entries**

020		Contract Total	
020		Outstanding Amount	

options
Rental Value Entries
Metered Usage Entries
Periodic Usage Entries
Item Tracking Lin

Group	MONTH-PEND	1	EAST		View and edit the periodic usage entries for the
r	MONTH-PEND	1	EAST		8/9/2020 9/8/2020

Click on the navigation menu item **Next Period**

Search	Edit List	Previous Period	Next Period	Set Usage	Clear Usa
--------	-----------	-----------------	-------------	-----------	-----------

Refreshes the date lines for the next rental

Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day
RENTAL	Order	RC00005	20000	Periodic Usa...	4/8/2019	Mor
RENTAL	Order	RC00005	20000	Periodic Usa...	4/9/2019	Tues
RENTAL	Order	RC00005	20000	Periodic Usa...	4/10/2019	Wed
RENTAL	Order	RC00005	20000	Periodic Usa...	4/11/2019	Thur
RENTAL	Order	RC00005	20000	Periodic Usa...	4/12/2019	Frida
RENTAL	Order	RC00005	20000	Periodic Usa...	4/13/2019	Satu



Click on **the first day to be included in the range of days.**

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name
Responsibility Center
Quote No.

Base Calendar Code ↑ Document Type ↑ Document No. ↑

Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

Press and hold the **Shift** key down.
Click on **the last day to be included in the range of days.**

Sell-to Customer Name
Responsibility Center
Quote No.
Posting Date
Order Date
Document Date

Rental Lines Manage Line Func

Rental Unit Standard Text

RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

Click on the navigation menu item **Set Usage**

Edit List Previous Period Next Period → Set Usage → Clear Usage Open in f

USAGE CALENDAR ENTRIES

Updates Usage Type for all selected dates.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non..
Order	RC00005	20000	No Usage	5/8/2019	Wednesday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/9/2019	Thursday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/10/2019	Friday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/11/2019	Saturday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/12/2019	Sunday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/13/2019	Monday	<input type="checkbox"/>

Click on the button **OK**

All selected dates will be updated with the Usage Type:

☒ Periodic Usage
☐ Stand By

OK Cancel

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Click on **the first day** to be included in the next range of days.

[illegible]

Click on **the last day** to be included in the next range of days.

Responsibility Center	RENTAL	Order	RC00005
Quote No.	RENTAL	Order	RC00005
Posting Date	RENTAL	Order	RC00005
Order Date	RENTAL	Order	RC00005
Document Date	RENTAL	Order	RC00005
	→ RENTAL	: Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
Rental Lines	Manage	Line	Func
Rental Unit No.	Standard Text Code		Des
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005
	RENTAL	Order	RC00005

Click on the navigation menu item **Set Usage**

Edit List
 ◀ Previous Period
 ▶ Next Period
 ➡ **Set Usage**
 ➡ Clear Usage
 📄 Open in f...

Update Usage Type for all selected dates.

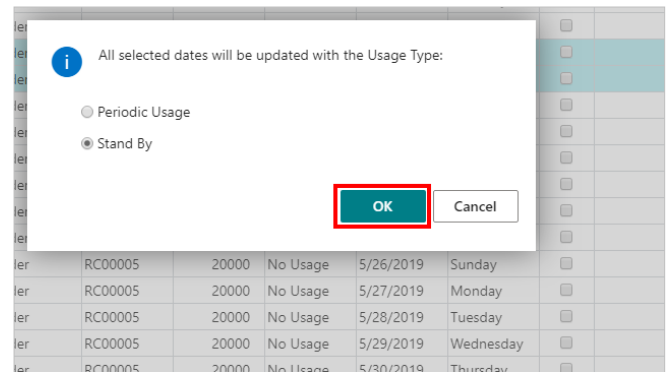
USAGE CALENDAR ENTRIES

Order	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
	Order	RC00005	20000	No Usage	5/8/2019	Wednesday	<input type="checkbox"/>
	Order	RC00005	20000	Periodic Us...	5/9/2019	Thursday	<input type="checkbox"/>
	Order	RC00005	20000	Periodic Us...	5/10/2019	Friday	<input type="checkbox"/>
	Order	RC00005	20000	Periodic Us...	5/11/2019	Saturday	<input type="checkbox"/>
	Order	RC00005	20000	Periodic Us...	5/12/2019	Sunday	<input type="checkbox"/>
	Order	RC00005	20000	Periodic Us...	5/13/2019	Monday	<input type="checkbox"/>

Click on the item **Stand By**

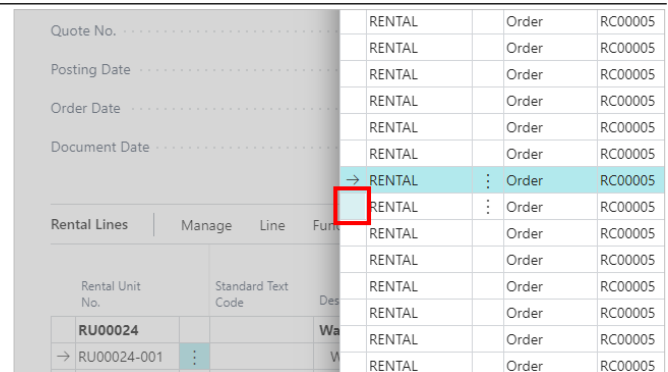
[illegible]

Click on the button **OK**



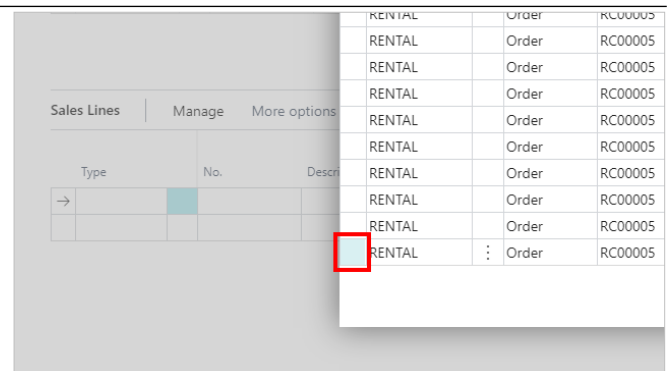
A dialog box with a blue information icon and the text: "All selected dates will be updated with the Usage Type:". Below this text are two radio buttons: "Periodic Usage" and "Stand By". The "Stand By" radio button is selected. At the bottom right of the dialog box are two buttons: "OK" (highlighted with a red rectangle) and "Cancel".

Click on **the first day to be included in the next range of days.**



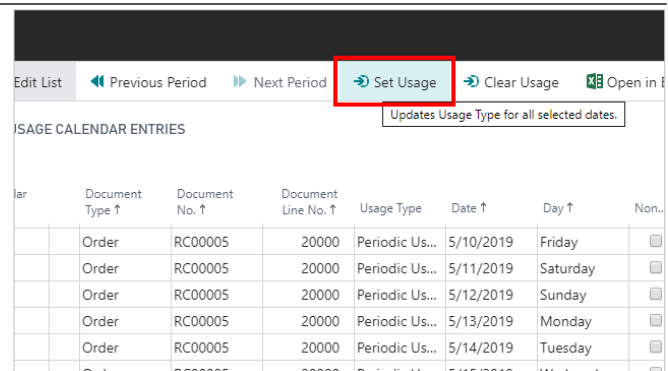
A screenshot of a software interface showing a table with multiple rows. The table has columns for "Quote No.", "Posting Date", "Order Date", "Document Date", "Rental Lines", "Manage", "Line", "Furn", "Rental Unit No.", "Standard Text Code", "Des", and "Wa". The row with "Quote No." RC00005 and "Posting Date" 5/26/2019 is highlighted in blue. A red rectangle highlights the "Rental Lines" column for this row.

Press and hold the **Shift** key down.
Click on **the last day to be included in the range of days.**



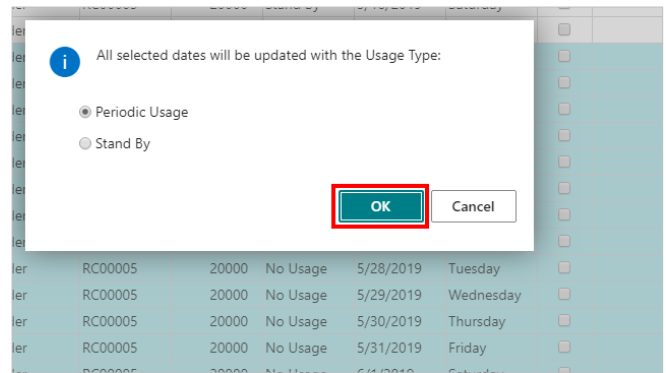
A screenshot of a software interface showing a table with multiple rows. The table has columns for "Sales Lines", "Manage", "More options", "Type", "No.", and "Descr". The row with "Type" "RENTAL" and "No." "Order" is highlighted in blue. A red rectangle highlights the "Type" column for this row.

Click on the navigation menu item **Set Usage**

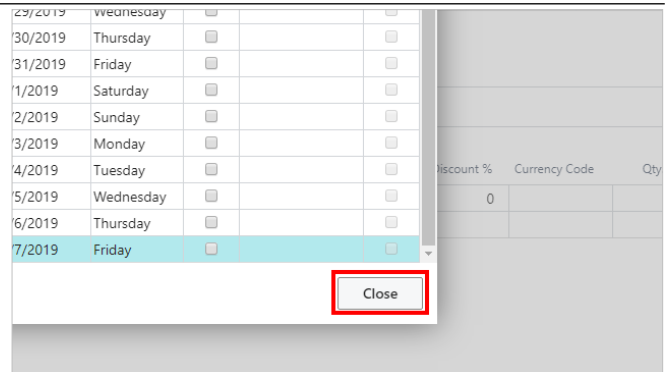


A screenshot of a software interface showing a navigation menu. The menu has several items: "Edit List", "Previous Period", "Next Period", "Set Usage" (highlighted with a red rectangle), "Clear Usage", and "Open in". Below the navigation menu is a section titled "USAGE CALENDAR ENTRIES" with a table. The table has columns for "Document Type", "Document No.", "Document Line No.", "Usage Type", "Date", "Day", and "Non..". The table contains several rows of data.

Click on the button **OK**



Click on the button **Close**



4.2.9. How to Process a Contract Using Periodic Usage Line Pricing

4.2.9.1. Overview

In order to process rental billing with Periodic Usage and Standby Pricing without Rental Price cards setup on the Rental Unit or group, the Periodic Usage Enabled field on the Rental Unit must be activated.

On the Rental Contract, and if applicable, the Rental Quote, the following fields must be added to the Rental Lines for processing Periodic Usage and Standby Charges in order to use line pricing. These fields are added using Settings - Personalize.

- Periodic Usage Billing
 - Periodic Usage Unit Price
 - Periodic Usage Tax Group Code
 - Standby Billing
 - Standby Unit Price
 - Standby Tax Group Code
- The Periodic Usage Enabled and Allow Zero Usage fields can as well be added to the Rental Lines, if needed.

The Periodic Usage Enabled will be checked, if the Rental Unit selected on the line has it enabled. When checked, then the Periodic Usage Billing and Standby Billing fields can be checked, which is required for using line pricing for billing Periodic Usage and Standby Charges.

If Standby Charges will not be billed, then the Standby Billing field should not be checked. When not checked, then in the Periodic Usage Entries calendar, the Usage Type of Standby will not be available to select on the lines, nor will it be available in the Select Usage page.

When there is no rental price card, then the Periodic Usage Tax Group Code and Standby Tax Group Code fields will be automatically populated with the same code as in the Tax Group Code field on the line and can be modified, if required.

4.2.9.2. How to Process a Periodic Usage Contract without a Price



Card

The following example demonstrates the entry and processing of using line pricing for Periodic Usage and Standby Charges.

In the example, there is no rental price card on either the rental group or the unit for the rental term entered on the rental line.

Click on the navigation menu item **Rental Contract**

Rental Terms Rental Units Rental Packages

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit	> Se
+ Sales Order	+ Purchase Invoice	> New	> R
+ Sales Invoice	+ Rental Quote	> Payments	Ex
+ Purchase Quote	+ Rental Contract	> Reports	

Create a new rental contract for rental pro

Click on the field **Sell-to Customer Name**

4/15/2024

Actions Navigate Fewer options

0.001

7/7/2020

RC00035

Click on the lookup button **Sell-to Customer Name**

ons

External Document No.

ZIP Code Phone No.

corporation	31772
ch	61236
School of Fine Art	37125

osit Amount

tract Total

standing Amount

Click on the link in cell **No.** with the value **10000**

Contract Rental Actions Navigate Fewer options

al

ustomer Name

o.

Date

ate

nt Date

No. ↑	Name	ZIP
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		



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Click on the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code					
→								



ODT Rentals Online Help

Click on the link in cell **Code** with the value **WEEK-PEND**

Line	Functions	Related	Fewer options
Standard Text Code	Description	Rental Terms Code	Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2
	Wacker 50Z3 Excavator Group	▼	0
		Code	Description
		WEEK-PEND	Weekly Rental - Per. Billing i
		WEEK-PEND-OPT	Weekly Rental - Per. Optimiz
		WEEK-PEND-PRO	Weekly Rental - Per. Prorate
		WEEK-PSTART	Weekly Rental - Per. Billing i
		WEEK-START	Weekly Rental for Billing at
		+ New	

Click on the button **OK**

Outstanding Amount

to prices exist for rental unit RU00024 for the term WEEK-PEND, therefore the rental unit price will be set to zero.

OK

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Periodic Usage Enabled	F	U	B
0.00	0.00	<input checked="" type="checkbox"/>			

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options
rd	Description	Rental Terms Code	Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2
	Wacker 50Z3 Excavator Group	-PEND ▼	0

Enter the text **1**.

Line	Functions	Related	Fewer options
rd	Description	Rental Terms Code	Rental Quantity Location Code Rental Terms Code Alt1 Rental Terms Code Alt2
	Wacker 50Z3 Excavator Group	WEEK-PE...	1



ODT Rentals Online Help

Click on the cell **Location Code**

Functions	Related	Fewer options				
Location	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
50Z3 Excavator Group	WEEK-PE...					4/6/2020
		100.00				

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
3 Excavator Group	WEEK-PE...	1			4/6/2020	4/12/2020
3 Excavator Group	WEEK-PE...	1				
			Code ↑	Name		
			→ CENTRAL	Central Warehouse		
			EAST	East Warehouse		
			RE Select record "EAST"	Inventory Items Rental Rese		
			SOUTH	South Warehouse		
			TEMP	Temporary Location		
			WEST	West Warehouse		
			+ New			
			0	0.00		

Click on the cell **Periodic Usage Enabled** with the value **on**

The setting on the Rental Unit Card defaults to the rental line and cannot be edited on the line. For Periodic Usage line pricing it is mandatory that this field is enabled on the Rental Unit card.

Document No.

Lines	Manage	Line	Functions	Related	Fewer options				
Alt Unit		Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price
0024	<div></div>	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
		0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00

Lines >

Click on **Periodic Usage Billing**

When Periodic Usage Enabled displays as checked, then the Periodic Usage Billing field can be checked. For line pricing, it is mandatory that this field is checked.

No.										
Manage	Line	Functions	Related	Fewer options						
	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price	Curr...	Code
⋮	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		
	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		



ODT Rentals Online Help

Click on the cell **Periodic Usage Unit Price** with the value **0.00**

Line	Functions	Related	Fewer options						
Alt1 ental Price	Alt2 Rental Unit Price	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price	Curr... Code	Ta... Co
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU

Enter the text **300.00**.

Enter the daily rate for the Periodic Usage billing.



Line	Functions	Related	Fewer options						
Alt1 ental Price	Alt2 Rental Unit Price	Allow Zero Usage	Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price	Curr... Code	Ta... Co
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU
0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU

Click on **Standby Billing**

When Standby Charges are to be billed when the unit is not in use, then the Standby Billing field must be checked.

</

Click on the cell **Standby Unit Price** with the value **0.00**

Related Fewer options 							
ow o ge	Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price	Curr... Code	Tax Co
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	300.00	<input checked="" type="checkbox"/>	0.00		SU
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU
							



ODT Rentals Online Help

Enter the text **100.00**.

Enter the daily rate that is to be billed when the rental unit is on standby rather than in use.

Related Fewer options							
Periodic Usage Enabled	Periodic Usage Billing	Periodic Usage Unit Price	Standby Billing	Standby Unit Price	Curr... Code	Ta... Co	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	300.00	<input checked="" type="checkbox"/>	0.00		SU	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="checkbox"/>	0.00		SU	

Click on the cell **Rental Unit No.**

Rental Lines					Manage	Line	Functions
Rental Unit No.	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Allow Zero Usage				
→ RU00024	0.00	0.00	<input type="checkbox"/>				
	0.00	0.00	<input type="checkbox"/>				

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines					Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code						
RU00024		Wacker 50Z3 Excavator Group	WEEK-PE...						
→		Wacker 50Z3 Excavator Group	WEEK-PE...						
	RC00020								
	RC00033								

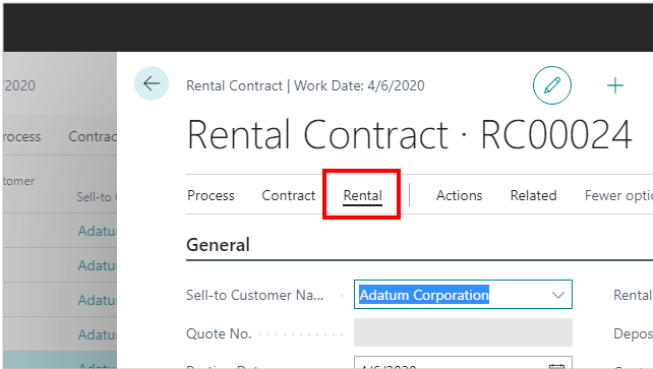
Sales Lines Manage Line Fewer options

Click on the link in cell **No.** with the value **RU00024-001**

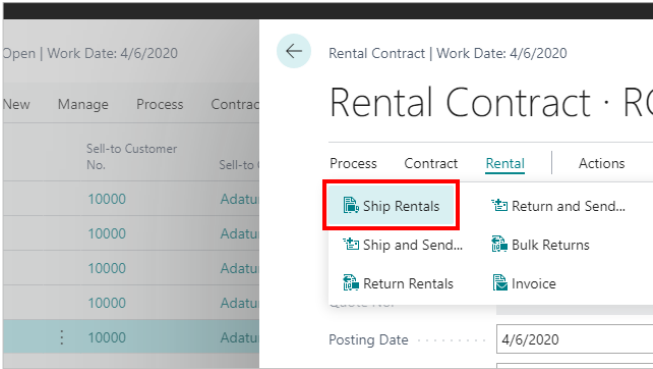
RENTAL UNIT LIST			
No. ↑	Description	Group ↑	
→ RU00024-001	Wacker 50Z3 Excavator		<input type="checkbox"/>
RU00024-002	Wacker 50Z3 Excavator		<input type="checkbox"/>
RU00024-003	Wacker 50Z3 Excavator		<input type="checkbox"/>



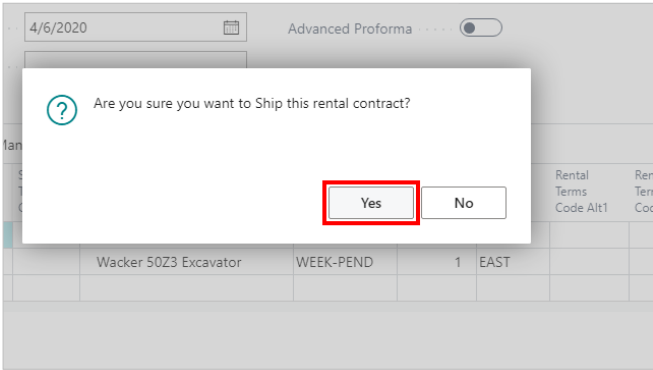
Click on the navigation menu item popup **Rental**



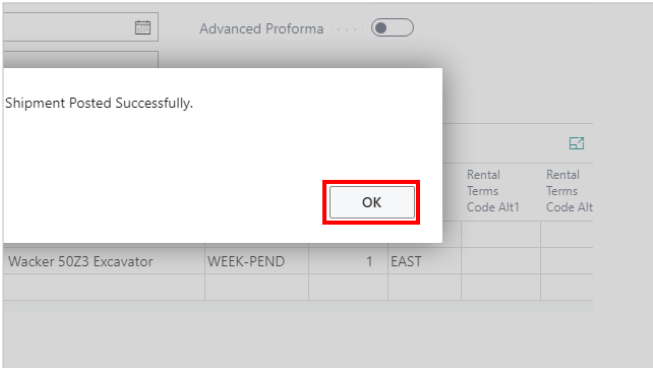
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**





ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date4/6/2020

Order Date4/6/2020

Document Date4/6/2020

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code		
RU00024		Wacker 50Z3 Excavator Group	WEEK-PE...		
→ RU00024-001		Wacker 50Z3 Excavator	WEEK-PE...		

Click on the navigation menu item **Periodic Usage Entries**

ment Date4/6/2020

Lines	Manage	Line	Functions	Related	Fewer options
Rental Amount Lines	Rental Value Entries	Metered Usage Entries	Item Tracking Li		
Rental Ledger Entries	View Rental Calendar	Periodic Usage Entries	Additional Note		

U00024-001		Wacker 50Z3 Excavator	WEEK-PE...	1	EAST
------------	--	-----------------------	------------	---	------

The following demonstrates the selection of multiple consecutive records in the calendar for setting the Type to Periodic Usage.

Click on the row menu button

6/2020

Rental Contract | Work Date: 4/6/2020

Edit - Periodic Usage Calendar Entries

Search

Edit List

Previous Period

Next Period

Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Us
→ RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No
RENTAL	Order	RC00024	20000	No

Click on the menu item **Select More**

Manage

Process

Contract

Sell-to Customer No.	Sell-to
10000	Adatu
10000	Adatu
10000	Adatu
10000	Adatu
10000	Adatu

Edit - Periodic Usage Calendar Entries

Search

Edit List

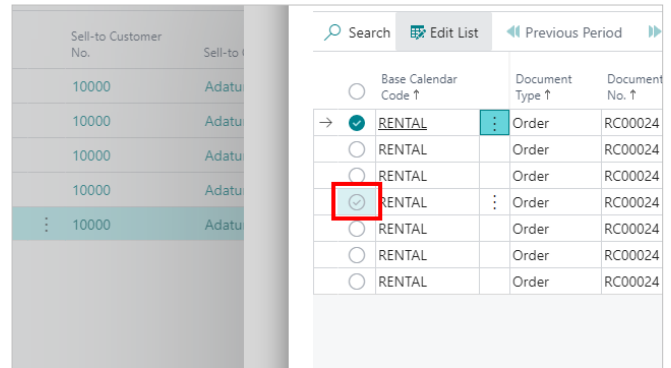
Previous Period

Base Calendar Code ↑	Document Type ↑	Document No. ↑	
→ RENTAL	Order	RC00024	
RENTAL	Order	RC00024	
RENTAL	Order	RC00024	
RENTAL	Order	RC00024	
RENTAL	Order	RC00024	
RENTAL	Order	RC00024	

Press and hold the **Shift** key down.

Click on **Base Calendar Code = RENTAL**,
Document Type = 1, **Document No. = RC00024**

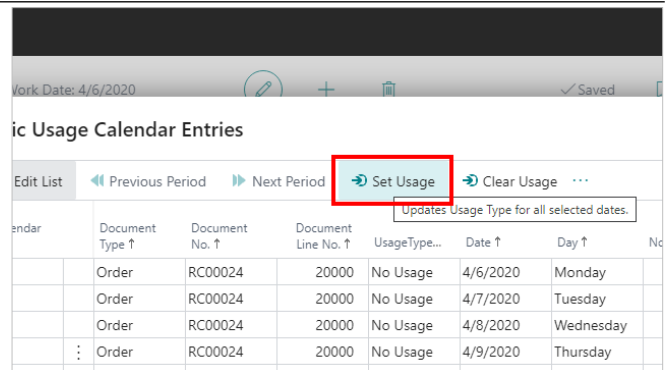
When the second record in the range is selected, then the circles for all records after the first record selected and the last record selected will be checked.



Sell-to Customer No.	Sell-to
10000	Adatu
10000	Adatu
10000	Adatu
10000	Adatu
10000	Adatu

Base Calendar Code	Document Type	Document No.
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024

Click on the navigation menu item **Set Usage**



Work Date: 4/6/2020

Periodic Usage Calendar Entries

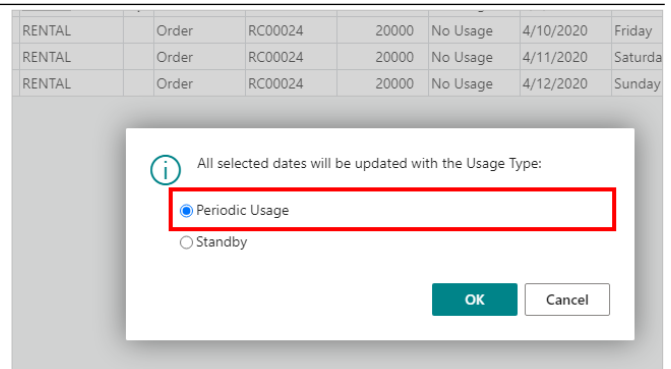
Edit List Previous Period Next Period **Set Usage** Clear Usage ...

Updates Usage Type for all selected dates.

Document Type	Document No.	Document Line No.	UsageType...	Date	Day
Order	RC00024	20000	No Usage	4/6/2020	Monday
Order	RC00024	20000	No Usage	4/7/2020	Tuesday
Order	RC00024	20000	No Usage	4/8/2020	Wednesday
Order	RC00024	20000	No Usage	4/9/2020	Thursday

Click on the item **Periodic Usage**

The Periodic Usage button is enabled by default. As these dates will be billed at the Periodic Usage Unit price, no change is required on the pop-up.



RENTAL	Order	RC00024	20000	No Usage	4/10/2020	Friday
RENTAL	Order	RC00024	20000	No Usage	4/11/2020	Saturday
RENTAL	Order	RC00024	20000	No Usage	4/12/2020	Sunday

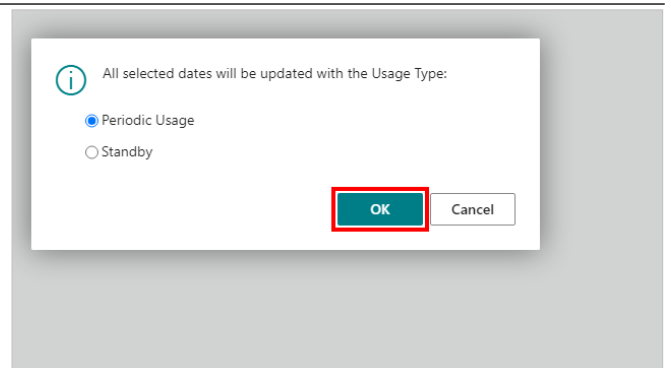
All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel

Click on the button **OK**



All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel



ODT Rentals Online Help

Click on **Base Calendar Code = RENTAL**,
Document Type = 1, **Document No. = RC00024**

Select a single records for setting the type to Standby.

Base Calendar Code ↑	Document Type ↑	Document No. ↑
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024
RENTAL	Order	RC00024

Click on the navigation menu item **Set Usage**

Document Type ↑	Document No. ↑	Document Line No. ↑	UsageType...	Date ↑	Day ↑	Non...
Order	RC00024	20000	Periodic Us...	4/6/2020	Monday	<input type="checkbox"/>
Order	RC00024	20000	Periodic Us...	4/7/2020	Tuesday	<input type="checkbox"/>
Order	RC00024	20000	Periodic Us...	4/8/2020	Wednesday	<input type="checkbox"/>
Order	RC00024	20000	Periodic Us...	4/9/2020	Thursday	<input type="checkbox"/>

Click on the item **Standby**

TAL	Order	RC00024	20000	No Usage	4/11/2020	Saturday
TAL	Order	RC00024	20000	No Usage	4/12/2020	Sunday

All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel

Click on the button **OK**

All selected dates will be updated with the Usage Type:

☐ Periodic Usage

☒ Standby

OK Cancel



ODT Rentals Online Help

Click on **Base Calendar Code = RENTAL**,
Document Type = 1, **Document No. = RC00024**

	Base Calendar Code ↑	Document Type ↑	Document No. ↑
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
⋮ 10000	Adatu	→ RENTAL	⋮ Order RC00024
		RENTAL	⋮ Order RC00024
		RENTAL	Order RC00024

Click on the row menu button

	Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Us
Adatu	RENTAL	Order	RC00024	20000	Per
Adatu	RENTAL	Order	RC00024	20000	Per
Adatu	RENTAL	Order	RC00024	20000	Per
Adatu	RENTAL	Order	RC00024	20000	Per
Adatu	RENTAL	Order	RC00024	20000	Sta
→ Adatu	→ RENTAL	⋮ Order	RC00024	20000	No
	RENTAL	Show more options	RC00024	20000	No

Click on the menu item **Select More**

	Code ↑	Type ↑	No. ↑
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
⋮ 10000	Adatu	→ RENTAL	⋮ Order RC00024
		Select More	Order RC00024

Click on **Base Calendar Code = RENTAL**,
Document Type = 1, **Document No. = RC00024**

	Code ↑	Type ↑	No. ↑
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
10000	Adatu	RENTAL	Order RC00024
⋮ 10000	Adatu	→ RENTAL	⋮ Order RC00024
		RENTAL	⋮ Order RC00024



Click on the navigation menu item **Set Usage**

Work Date: 4/6/2020

Periodic Usage Calendar Entries

Edit List Previous Period Next Period **Set Usage** Clear Usage ...

Calendar	Document Type ↑	Document No. ↑	Document Line No. ↑	UsageType...	Date ↑	Day ↑	No
	Order	RC00024	20000	Periodic Us...	4/6/2020	Monday	
	Order	RC00024	20000	Periodic Us...	4/7/2020	Tuesday	
	Order	RC00024	20000	Periodic Us...	4/8/2020	Wednesday	
	Order	RC00024	20000	Periodic Us...	4/9/2020	Thursday	

Click on the item **Periodic Usage**

RENTAL Order RC00024 20000 Standby 4/10/2020 Friday

RENTAL Order RC00024 20000 No Usage 4/11/2020 Saturda

RENTAL Order RC00024 20000 No Usage 4/12/2020 Sunday

All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel

Click on the button **OK**

All selected dates will be updated with the Usage Type:

☒ Periodic Usage

☐ Standby

OK Cancel

Click on the button **Close**

Close



Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

4/6/2020

4/6/2020

4/6/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Select the date the the invoice is to be posted on, which will post the Rental Amount Lines up to and including the date selected.

e No.

ng Date 4/6/2020

r Date

ment Date

April 2020

12

Go to today Done

Rental Unit No.	Standard Text Code	Description	Terms Code	Rental Quantity	Location Code
RU00024		Wacker 50Z3 Excavator Group	WEEK-PE...	1	EAST

Click on the navigation menu item popup **Rental**

2020

process Contract

customer Sell-to

Adatu

Adatu

Adatu

Adatu

Rental Contract | Work Date: 4/6/2020

Rental Contract · RC00024

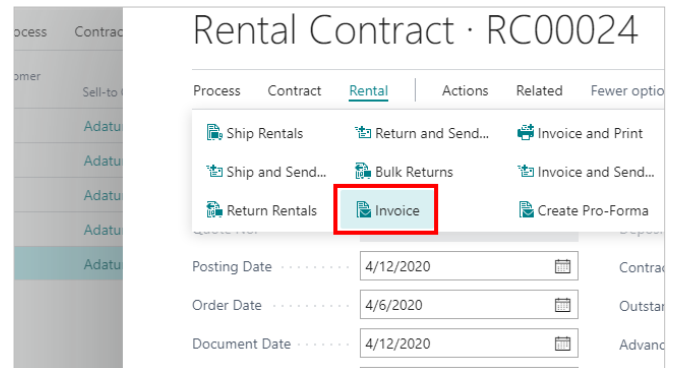
Process Contract **Rental** Actions Related Fewer optio

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Invoice**



Rental Contract · RC00024

Process Contract **Rental** Actions Related Fewer options

Ship Rentals Return and Send... Invoice and Print

Ship and Send... Bulk Returns Invoice and Send...

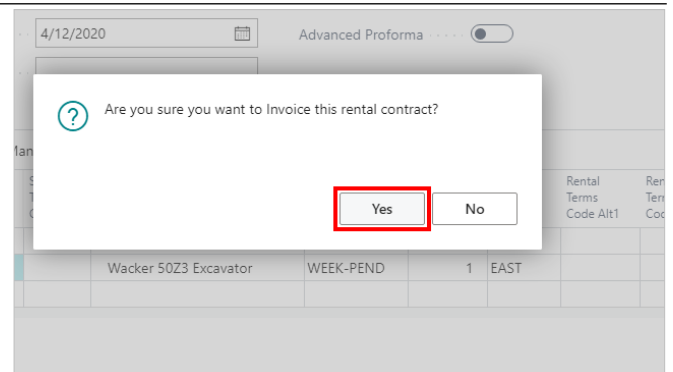
Return Rentals **Invoice** Create Pro-Forma

Posting Date 4/12/2020 Contract

Order Date 4/6/2020 Outstar

Document Date 4/12/2020 Advanc

Click on the button **Yes**

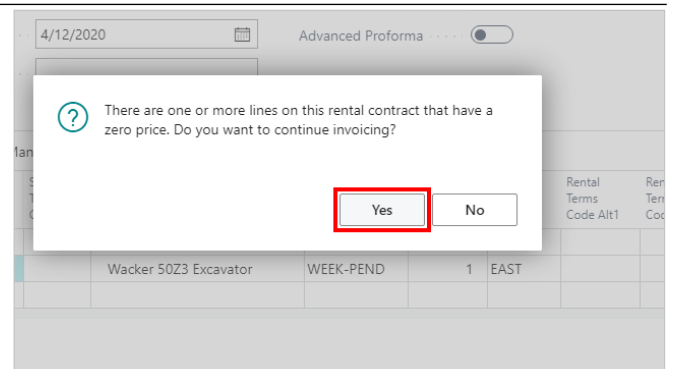


Are you sure you want to Invoice this rental contract?

Yes No

Rental	Terms	Code	Alt1	Code	Alt
Wacker 50Z3 Excavator	WEEK-PEND	1	EAST		

Click on the button **Yes**

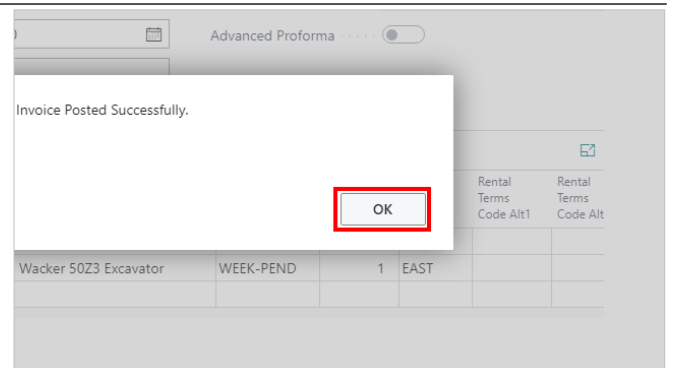


There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

Rental	Terms	Code	Alt1	Code	Alt
Wacker 50Z3 Excavator	WEEK-PEND	1	EAST		

Click on the button **OK**



Invoice Posted Successfully.

OK

Rental	Terms	Code	Alt1	Code	Alt
Wacker 50Z3 Excavator	WEEK-PEND	1	EAST		

As all days from the Rental Start Date to Rental Return Date have been invoiced, the unit can be returned, which will close the contract.
The contract will then be available in the Completed Rental Contract list.



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Standby Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	Departm... Code
100.00		SUPPLIES	0	0	0	0	0	<input checked="" type="checkbox"/>	
100.00		SUPPLIES	0	1	0	0	0	<input checked="" type="checkbox"/>	

Enter the text **1**.

Standby Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disco... %	Ret... Day Billa...	Departm... Code
100.00		SUPPLIES	0	0	0	0	0	<input checked="" type="checkbox"/>	
100.00		SUPPLIES	0	1	1	0	0	<input checked="" type="checkbox"/>	

When there are multiple rental units to be returned on the same date, then the Bulk Returns menu option on the main Rental Menu or the Rental Lines menu can be used to update the Qty. to Return for all or multiple Rental Lines.

Click on the navigation menu item popup **Rental**

Rental Contract | Work Date: 4/6/2020

Rental Contract · RC00024

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental

Quote No. Depos

Click on the navigation menu item **Return Rentals**

New Manage Process Contract

Sell-to Customer No. Sell-to

10000 Adatu

10000 Adatu

10000 Adatu

10000 Adatu

10000 Adatu

10000 Adatu

Rental Contract · RC

Process Contract **Rental** Actions

Ship Rentals Return and Send...

Ship and Send... Bulk Returns

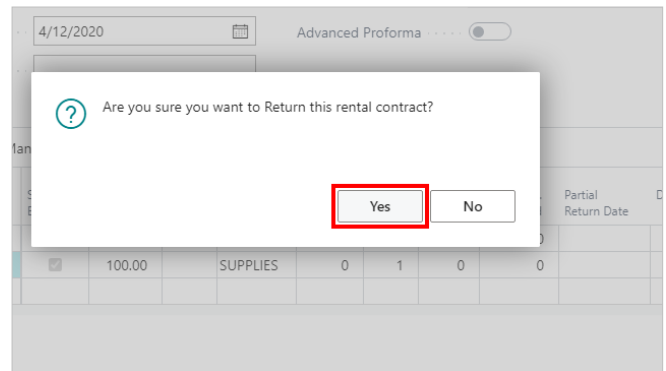
Return Rentals Invoice

Posting Date 4/12/2020

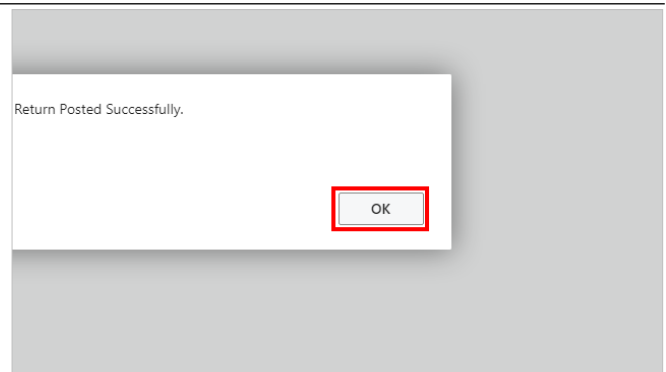
Order Date 4/6/2020

Document Date 4/12/2020

Click on the button **Yes**



Click on the button **OK**



4.2.10. How to Swap Rental Units with Periodic Usage

4.2.10.1. Overview

The swapping of a Rental Unit with periodic usage pricing can be processed on any date during a rental period.

The following scenarios provide examples of various swapping processes, and the results of that will occur.

The recommended process when swapping a Rental Unit assigned to a group within a rental period is that the Rental Periodic Usage Calendar on the unit to be returned be updated to the date of the swap, and an invoice be posted up to that date.

Thus ensuring that the Rental Values Entries created when posting the invoice are posted to the unit being returned.

This is especially important should the units be linked to Fixed Assets. The above process will ensure that the Rental Statistics will display the Periodic Usage and Standby Charge revenue on the unit, which generated the revenue.

Should the Rental Calendar be updated on the returning unit, however, an invoice is not posted, then the Rental Amount Lines and subsequent posting of an invoice will be post the usage to the Rental Value Entries of the unit shipped out, not the unit being returned.

Should the swap function be ran, and then usage need to be entered for the unit returned, this entry must be done on the unit shipped out in the swap. Thus leading to the same results as when not invoicing usage entered on the returning unit, before running the swap.

IMPORTANT NOTE

Currently swapping a rental unit with Periodic Usage and/or Standby Charges should NOT be done when the Rental Term on the Rental Line has an Invoicing Type of Start or Periodic Start due to known issue. Please review the NA Release Notes 6.0.0.0 for an explanation of the issue.

4.2.10.2. Swapping Rental Units within a Rental Period

The following demonstrates the recommended process for swapping a Rental Unit within a Rental Period.

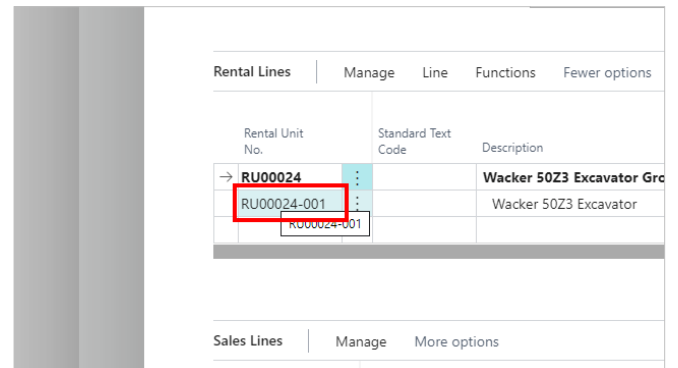
The contract is for 2 months, using a monthly periodic end rental term that has had the Periodic Usage and Standby Charges entered, and invoiced at the end of the first rental period.

The swap will occur within the second month.

The Rental Periodic Usage Calendar will be updated, setting the Usage Type on the days up to the day the swap will occur on.

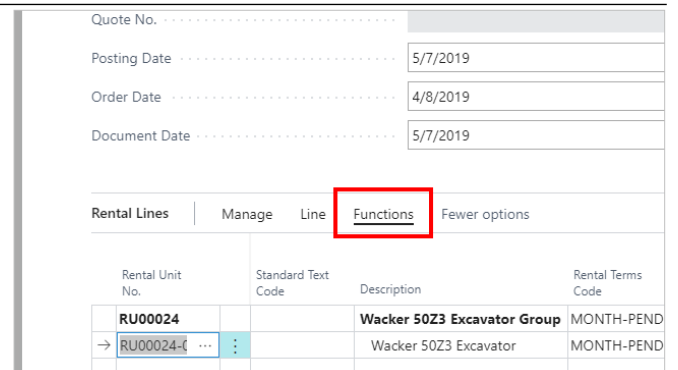
Then an invoice will be posted, so that the usage will be posted to the unit being returned during the swap.

Click on the cell **Rental Unit No.** with the value **RU00024-001**



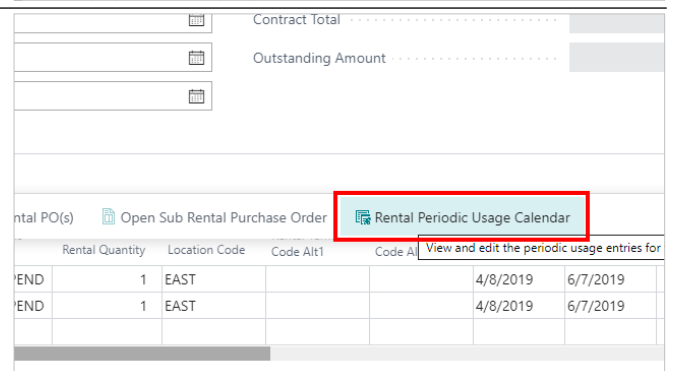
Rental Unit No.	Standard Text Code	Description
→ RU00024		Wacker 50Z3 Excavator Gro
RU00024-001		Wacker 50Z3 Excavator

Click on the navigation menu item popup **Functions**



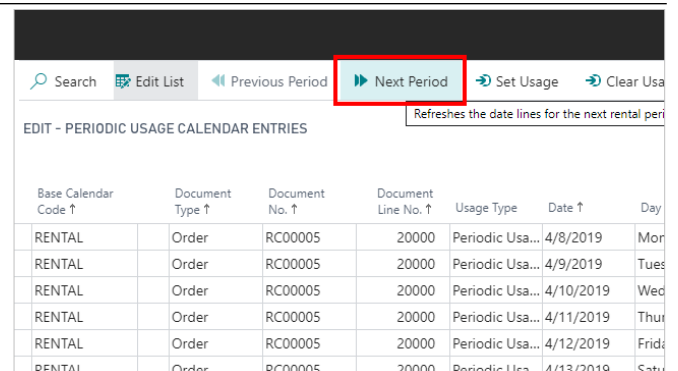
Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEND
→ RU00024-001		Wacker 50Z3 Excavator	MONTH-PEND

Click on the navigation menu item **Rental Periodic Usage Calendar**



Rental Quantity	Location Code	Code Alt1	Code Alt2	View and edit the periodic usage entries for
END	1	EAST		4/8/2019 6/7/2019
END	1	EAST		4/8/2019 6/7/2019

Click on the navigation menu item **Next Period**



Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day
RENTAL	Order	RC00005	20000	Periodic Usa...	4/8/2019	Mor
RENTAL	Order	RC00005	20000	Periodic Usa...	4/9/2019	Tues
RENTAL	Order	RC00005	20000	Periodic Usa...	4/10/2019	Wed
RENTAL	Order	RC00005	20000	Periodic Usa...	4/11/2019	Thur
RENTAL	Order	RC00005	20000	Periodic Usa...	4/12/2019	Frid
RENTAL	Order	RC00005	20000	Periodic Usa...	4/13/2019	Satu



Click on **the first day to be included in the range of days.**

RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract

Process Contract Rental Action

General

Sell-to Customer Name
Responsibility Center
Quote No.

Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

Press and hold the **Shift** key down.
Click on **the last day to be included in the range of days.**

Process Contract Rental Action

General

Sell-to Customer Name
Responsibility Center
Quote No.
Posting Date
Order Date
Document Date

Code ↑	Type ↑	No. ↑
→ RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005
RENTAL	Order	RC00005

The date that the unit will be swapped on, May 15, will not be billed to the customer as Periodic Usage or as a Standby Charge.

Click on the navigation menu item **Set Usage**

Edit List Previous Period Next Period **Set Usage** Clear Usage Open in t

Updates Usage Type for all selected dates.

Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non..
Order	RC00005	20000	No Usage	5/8/2019	Wednesday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/9/2019	Thursday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/10/2019	Friday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/11/2019	Saturday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/12/2019	Sunday	<input type="checkbox"/>
Order	RC00005	20000	No Usage	5/13/2019	Monday	<input type="checkbox"/>

Click on the button **OK**

All selected dates will be updated with the Usage Type:

☒ Periodic Usage
☐ Stand By

OK Cancel



ODT Rentals Online Help

Click on the button **Close**

The screenshot shows a calendar for May 2019. The days of the week are listed in the first column, and the dates are in the second column. A 'Close' button is located at the bottom right of the calendar, highlighted with a red rectangular box.

The following is a review of the Rental Amount Lines created by the setting of the Usage Type on the calendar days.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

The screenshot shows the 'Rental Lines' table. The first row has the following data: Rental Unit No. (RU00024), Standard Text Code (Wacker 50Z3 Excavator Gro), and Description (Wacker 50Z3 Excavator). The cell containing 'RU00024' is highlighted with a red rectangular box.

Click on the navigation menu item popup **Line**

The screenshot shows the 'Rental Lines' table. The 'Line' navigation menu item is highlighted with a red rectangular box. The table contains the following data: Rental Unit No. (RU00024), Standard Text Code (Wacker 50Z3 Excavator Group), Description (Wacker 50Z3 Excavator), and Rental Code (MONT).

Click on the navigation menu item **Rental Amount Lines**

The screenshot shows the 'Rental Amount Lines' table. The 'Rental Amount Lines' navigation menu item is highlighted with a red rectangular box. The table contains the following data: Rental Unit No. (RU00024), Standard Text Code (Wacker 50Z3 Excavator Gro), Description (Wacker 50Z3 Excavator), and Rental Code (MONT).



ODT Rentals Online Help

Click on the cell **Billing Date** with the value **5/14/2019**

Notice that there is a Periodic Usage Rental Amount Line for each day from May 9 to May 14 and the Billing Date matches the day.

306.00	SUPPLIES	5/9/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/10/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/11/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/12/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/13/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/14/2019	<input type="checkbox"/>
0.00	SUPPLIES	6/7/2019	<input type="checkbox"/>

Close

Click on the button **Close**

306.00	SUPPLIES	5/9/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/10/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/11/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/12/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/13/2019	<input type="checkbox"/>
306.00	SUPPLIES	5/14/2019	<input type="checkbox"/>
0.00	SUPPLIES	6/7/2019	<input type="checkbox"/>

Close

10:14 PM
2/14/2020

The following demonstrates the invoicing of the contract, using the last day, May 14, as the Posting Date.

Click on the field **Posting Date**

Adatum Corporation

5/7/2019

4/8/2019

5/7/2019

Type the date in the format M/d/yyyy

Ext
Ren
Dep
Cor
Out

Page Line Functions Fewer options

Click on the link **Open the date picker**

corporation

External Document No.
Rental Terms Code
Deposit Amount
Contract Total
Open the date picker amount

options



ODT Rentals Online Help

Click on a date in the calendar

For this example, select May 14.

Unit	Standard Text Code	Description	Code	Rental Quantity	Location
024		Wacker 50Z3 Excavator Group	MONTH-PEND	1	EA
024-001		Wacker 50Z3 Excavator	MONTH-PEND	1	EA

The Proforma Invoice can be printed, saved or previewed by selecting Process, then Print Proforma.

The following demonstrates the posting of the invoice.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Invoice**

The menu option of Invoice and Print can be selected to print the invoice at the same time as the posting.

Click on the button **Yes**

The following message occurs as the Rental Unit Price field amount is zero. In this example this is correct, as the Rental Price card for the rental term on the line for the group, does not have a rental price.



Click on the button **Yes**

Outstanding Amount

There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

					Rental Start	Rental Return Date
ITH-PEND	1	EAST			4/8/2019	6/7/2019
ITH-PEND	1	EAST			4/8/2019	6/7/2019

Click on the button **OK**

Invoice Posted Successfully.

OK

					Rental Start	Rental Return Date
1	EAST				4/8/2019	6/7/2019
1	EAST				4/8/2019	6/7/2019

The following demonstrates the review of the invoiced Rental Amount Lines on the unit that will be returned during the swap.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
→ RU00024	:	Wacker 50Z3 Excavator Gro		
RU00024-001	:	Wacker 50Z3 Excavator		
	RU00024-001			

Sales Lines	Manage	More options
-------------	--------	--------------

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/14/2019

Order Date 4/8/2019

Document Date 5/14/2019

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Code	
RU00024		Wacker 50Z3 Excavator Group	MONT	
→ RU00024-0	...	Wacker 50Z3 Excavator	MONT	



Click on the navigation menu item **Rental Amount Lines**

Posting Date 5/14/2019

Order Date 4/8/2019

Document Date 5/14/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

No. View the rental amount line records that will be billed for the sel

RU00024		Wacker 50Z3 Excavator Gro
→ RU00024-001	:	Wacker 50Z3 Excavator

Click on the cell **Invoice No.** with the value **RI00007**

Note that all the records related to the Rental Calendar records invoiced for the partial period prior to the swapping have the field Billed checked and the Invoice No. populated.

Also note, that there is a line with a Type of Rental for the next rental period.

306.00	SUPPLIES	5/9/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/10/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/11/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/12/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/13/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/14/2019	<input checked="" type="checkbox"/>	RI00007
0.00	SUPPLIES	6/7/2019	<input type="checkbox"/>	RI00007

Close

Click on the button **Close**

306.00	SUPPLIES	5/9/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/10/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/11/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/12/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/13/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/14/2019	<input checked="" type="checkbox"/>	RI00007
0.00	SUPPLIES	6/7/2019	<input type="checkbox"/>	

Close

The following demonstrates the review of the Rental Value Entries generated by the invoicing of the Rental Amount Lines created by the Rental Periodic Usage Calendar Entries.

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 5/14/2019

Order Date 4/8/2019

Document Date 5/14/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-001	:	Wacker 50Z3 Excavator	MONT



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Click on the navigation menu item **Rental Value Entries**

g Date 5/14/2019

r Date 4/8/2019

ment Date 5/14/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | **Rental Value Entries** | Rental Usage Track

No.	Code	Description	View the rental value entries for the select	
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEND	1
RU00024-001	:	Wacker 50Z3 Excavator	MONTH-PEND	1

Click on the cell **Posting Date** with the value **5/14/2019**

Note that Rental Value Entries were created for the usage entered and invoiced prior to the swapping process.

5/7/2019	Standby	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001
5/14/2019	Periodic Usage	RC00005	RU00024-001	50Z3-001

Click on the button **Close**

100.00	100.00	102.00	25
300.00	300.00	306.00	47
300.00	300.00	306.00	48
300.00	300.00	306.00	49
300.00	300.00	306.00	50
300.00	300.00	306.00	51
300.00	300.00	306.00	52

Close

The following demonstrates the running of the Rental Swap function.

Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 5/14/2019

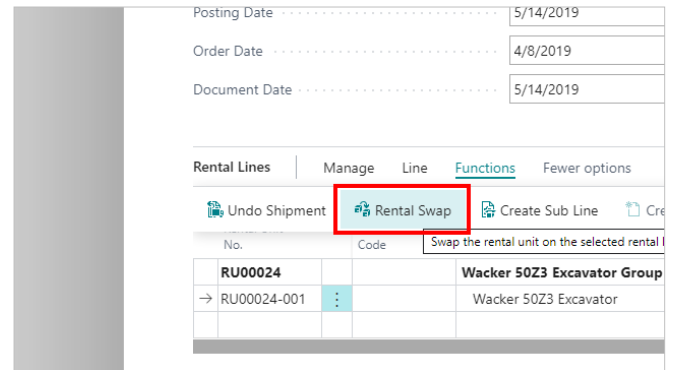
Order Date 4/8/2019

Document Date 5/14/2019

Rental Lines | Manage | Line | **Functions** | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEND
→ RU00024-001	:	Wacker 50Z3 Excavator	MONTH-PEND

Click on the navigation menu item **Rental Swap**



Posting Date 5/14/2019

Order Date 4/8/2019

Document Date 5/14/2019

Rental Lines | Manage | Line | **Functions** | Fewer options

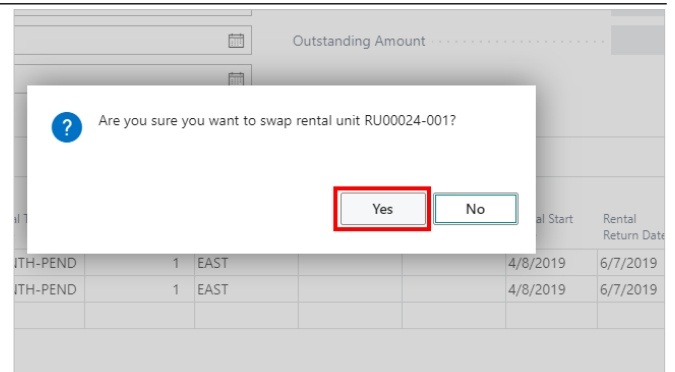
Undo Shipment **Rental Swap** Create Sub Line Create

No. Code Swap the rental unit on the selected rental I

RU00024 Wacker 50Z3 Excavator Group

→ RU00024-001 Wacker 50Z3 Excavator

Click on the button **Yes**



Outstanding Amount

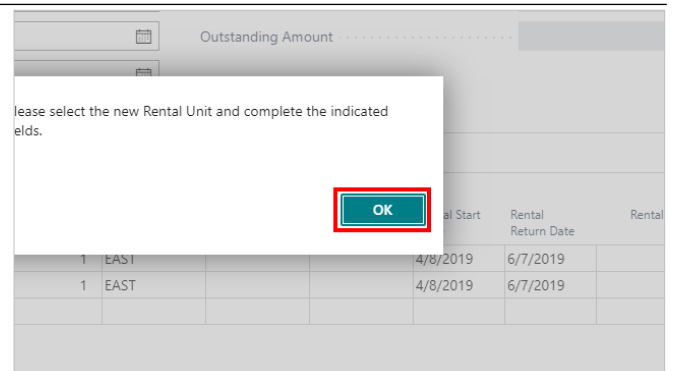
Are you sure you want to swap rental unit RU00024-001?

Yes No

ITH-PEND 1 EAST 4/8/2019 6/7/2019

ITH-PEND 1 EAST 4/8/2019 6/7/2019

Click on the button **OK**



Outstanding Amount

Please select the new Rental Unit and complete the indicated fields.

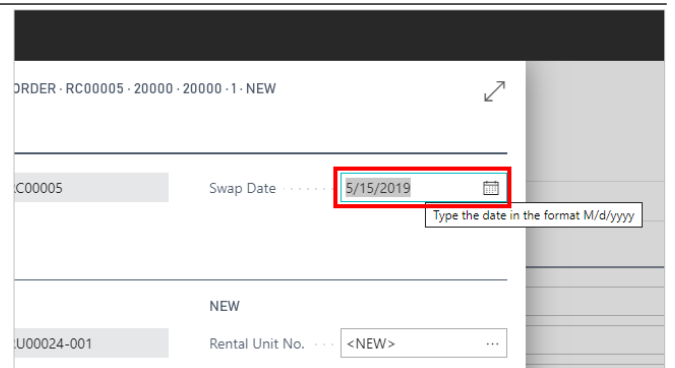
OK

1 EAST 4/8/2019 6/7/2019

1 EAST 4/8/2019 6/7/2019

Click on the field **Swap Date**

The date in the Swap Date field defaults from the Users Work Date. The date is to be set to the date that the swap occurs on. In this example, the swap is to occur on May 15.



ORDER · RC00005 · 20000 · 20000 · 1 · NEW

C00005 Swap Date 5/15/2019

Type the date in the format M/d/yyyy

NEW

U00024-001 Rental Unit No. ... <NEW> ...



ODT Rentals Online Help

Click on the field **Rental Unit No.**

Click on the lookup button **Rental Unit No.**

Click on the link in cell **No.** with the value **RU00024-002**

Select the Rental Unit that is to be shipped out during the swap.

Click on the button **OK**

A new Rental Line is automatically created for the shipped out unit.
The Rental Start Date is set to the day after the swap date. The Rental Return Date set to the date that was on the returned unit Rental Line prior to the swap.



Click on the cell **Rental Unit No.** with the value **RU00024-002**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00024		Wacker 50Z3 Excavator Gro		
→ RU00024-001	:	Wacker 50Z3 Excavator		
RU00024-002	:	Wacker 50Z3 Excavator		
	RU00024-002			
Sales Lines	Manage	More options		

Click on the cell **Rental Start Date** with the value **5/16/2019**

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1
EAST			4/8/2019	6/7/2019	0.00	
EAST			4/8/2019	5/15/2019	0.00	
EAST			5/16/2019	6/7/2019	0.00	
			Type the date in the format M/d/yyyy			

Click on the cell **Rental Return Date** with the value **6/7/2019**

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	A
		4/8/2019	6/7/2019	0.00	0.00	
		4/8/2019	5/15/2019	0.00	0.00	
		5/16/2019	6/7/2019	0.00	0.00	

The following demonstrates a review of the Rental Amount Lines for the unit returned during the swap.

Click on the cell **Rental Unit No.** with the value **RU00024-001**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00024		Wacker 50Z3 Excavator Gro		
RU00024-001	:	Wacker 50Z3 Excavator		
→ RU00024-002	:	Wacker 50Z3 Excavator		
Sales Lines	Manage	More options		

Click on the navigation menu item popup **Line**

Quote No.	
Posting Date	5/15/2019
Order Date	4/8/2019
Document Date	5/15/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00024		Wacker 50Z3 Excavator Group	MONT
→ RU00024-C ...	:	Wacker 50Z3 Excavator	MONT
RU00024-002		Wacker 50Z3 Excavator	MONT

Click on the navigation menu item **Rental Amount Lines**

Posting Date	5/15/2019
Order Date	4/8/2019
Document Date	5/15/2019

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Amount Lines	Rental Ledger Entries	Rental Va
----------------------------	-----------------------	-----------

No. View the rental amount line records that will be billed for the

No.			
RU00024		Wacker 50Z3 Excavator Gro	
→ RU00024-001	:	Wacker 50Z3 Excavator	
RU00024-002		Wacker 50Z3 Excavator	

Click on the cell **Type** with the value **Periodic Usage**

Notice that the line for the Type of Rental for May 8 to June 7 is no longer in the lines for the unit returned in the swap.

Rental	4/8/2019 12:00 AM	5/7/2019 11:59 PM
Periodic Usage	5/9/2019 12:00 AM	5/9/2019 11:59 PM
Periodic Usage	5/10/2019 12:00 AM	5/10/2019 11:59 PM
Periodic Usage	5/11/2019 12:00 AM	5/11/2019 11:59 PM
Periodic Usage	5/12/2019 12:00 AM	5/12/2019 11:59 PM
Periodic Usage	5/13/2019 12:00 AM	5/13/2019 11:59 PM
Periodic Usage	5/14/2019 12:00 AM	5/14/2019 11:59 PM

Click on the button **Close**

0.00	SUPPLIES	5/7/2019	<input checked="" type="checkbox"/>	RI00006
306.00	SUPPLIES	5/9/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/10/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/11/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/12/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/13/2019	<input checked="" type="checkbox"/>	RI00007
306.00	SUPPLIES	5/14/2019	<input checked="" type="checkbox"/>	RI00007

Close

The following demonstrates the processing of the second invoice for the rental period. This includes the updating of the Rental Periodic Usage Calendar on the unit that was shipped out during the swap and the posting of the invoice.



ODT Rentals Online Help

Click on the field **Posting Date**

The screenshot shows a form with several fields. The 'Posting Date' field is highlighted with a red box and contains the date '5/15/2019'. Below it, there is a date picker interface with a calendar icon and a text input field containing '4/8/2019' and a placeholder 'Type the date in the format M/d/yyyy'. The 'Posting Date' field is also highlighted with a blue border.

Click on the link **Open the date picker**

The screenshot shows a form with several fields. The 'Open the date picker' link is highlighted with a red box. The form includes fields for 'Adatum Corporation', 'External Document No.', 'Rental Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount'. The 'Open the date picker' link is located next to the 'Contract Total' field.

Click on the link **Next**

The screenshot shows a form with several fields. The 'Next' link is highlighted with a red box. The form includes fields for 'Adatum Corporation', 'External Document No.', 'Rental Terms Code', 'Deposit Amount', 'Contract Total', and 'Outstanding Amount'. The 'Next' link is located next to the 'Contract Total' field.

Click on a date in the calendar

Select the date the second rental period is to be invoiced on. In this example the last day of the rental will be used, which is the same as the Rental Return Date on the Rental Line.

The screenshot shows a date picker calendar for June 2019. The date '7' is highlighted with a red box. The calendar is displayed below the 'Posting Date' field, which contains '5/15/2019'. The calendar shows the days of the week and the dates of the month. The 'Next' link is also visible next to the calendar.

The following demonstrates the updating of the Rental Periodic Usage Calendar on the unit shipped out during the swap.



Click on the cell **Rental Unit No.** with the value **RU00024-002**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description		
RU00024		Wacker 50Z3 Excavator Gro		
→ RU00024-001		Wacker 50Z3 Excavator		
RU00024-002		Wacker 50Z3 Excavator		
RU00024-002				
Sales Lines	Manage	More options		








Click on the navigation menu item popup **Functions**

Quote No.	
Posting Date	6/7/2019
Order Date	4/8/2019
Document Date	6/7/2019

Rental Lines	Manage	Line	<u>Functions</u>	Fewer options
--------------	--------	------	------------------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00024		Wacker 50Z3 Excavator Group	MONTH-PEND
RU00024-001		Wacker 50Z3 Excavator	MONTH-PEND
→ RU00024-002		Wacker 50Z3 Excavator	MONTH-PEND

Click on the navigation menu item **Rental Periodic Usage Calendar**

	Contract Total				
	Outstanding Amount				
					
Rental PO(s)	 Open Sub Rental Purchase Order	 Rental Periodic Usage Calendar			
Rental Quantity	Location Code	Code Alt1	Code Alt2	Date	Return Date
END	1	EAST		4/8/2019	6/7/2019
END	1	EAST		4/8/2019	5/15/2019
END	1	EAST		5/16/2019	6/7/2019

When calendar days are not billed on the unit returned the calendar on the shipped out unit will include these days.

In this example, May 15 is included from the unit returned during the swap, as the customer was not billed for usage for that day.

Click on the cell **Date** with the value **5/15/2019**

The date of the swap, May 15, will not have the Usage Type set to Periodic Usage or Standby Charge as the day will not be billed to the customer.

Previous Period

Next Period

Set Usage

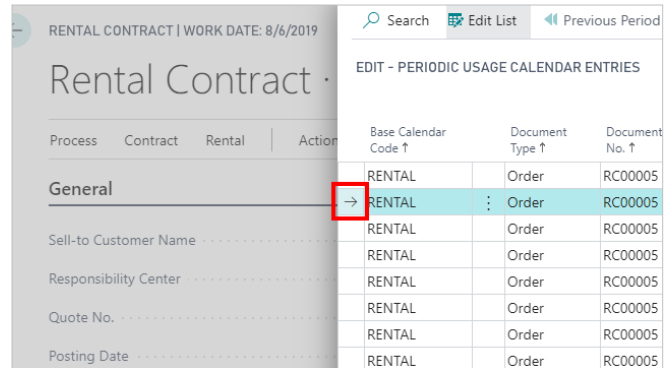
Clear Usage

Open in Excel

BAR ENTRIES

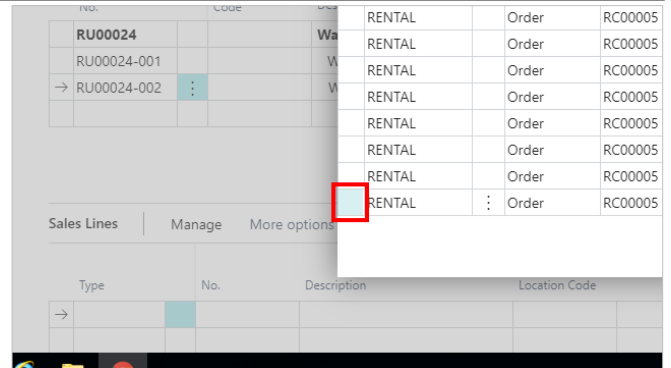
Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...	Description
RC00005	20500	No Usage	5/15/2019	Wednesday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/16/2019	Thursday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/17/2019	Friday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/18/2019	Saturday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/19/2019	Sunday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/20/2019	Monday	<input type="checkbox"/>	
RC00005	20500	No Usage	5/21/2019	Tuesday	<input type="checkbox"/>	

Click on **the first day to be included in the range of days.**



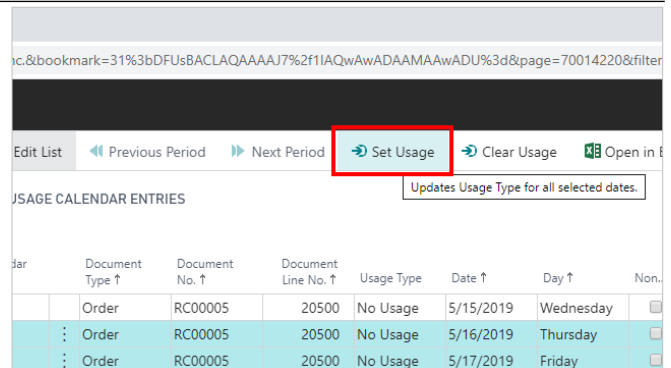
Process	Contract	Rental	Action	Base Calendar Code ↑	Document Type ↑	Document No. ↑
General				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005

Press and hold the **Shift** key down.
Click on **the last day to be included in the range of records to set the Usage Type.**



Process	Contract	Rental	Action	Base Calendar Code ↑	Document Type ↑	Document No. ↑
General				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005
				RENTAL	Order	RC000005

Click on the navigation menu item **Set Usage**

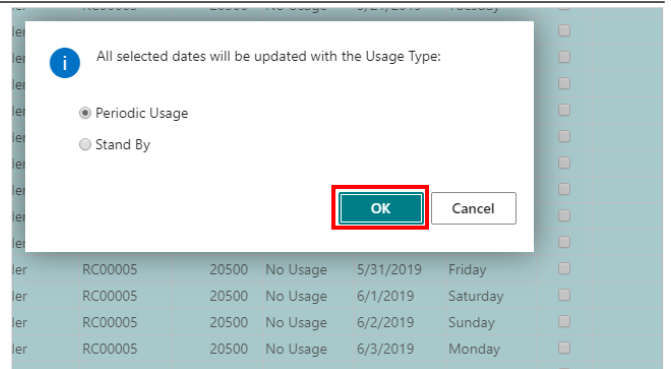


Navigation menu: Edit List, Previous Period, Next Period, **Set Usage**, Clear Usage, Open in t

Updates Usage Type for all selected dates.

Calendar	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
	Order	RC000005	20500	No Usage	5/15/2019	Wednesday	
	Order	RC000005	20500	No Usage	5/16/2019	Thursday	
	Order	RC000005	20500	No Usage	5/17/2019	Friday	

Click on the button **OK**



Dialog box: All selected dates will be updated with the Usage Type:

Periodic Usage (selected)

Stand By

OK Cancel

Calendar	Document Type ↑	Document No. ↑	Document Line No. ↑	Usage Type	Date ↑	Day ↑	Non...
	Order	RC000005	20500	No Usage	5/31/2019	Friday	
	Order	RC000005	20500	No Usage	6/1/2019	Saturday	
	Order	RC000005	20500	No Usage	6/2/2019	Sunday	
	Order	RC000005	20500	No Usage	6/3/2019	Monday	



ODT Rentals Online Help

Click on the button **Close**

The Rental Amount Lines can be reviewed, to verify that the dates selected, are the dates to be billed to the customer for the usage on the shipped out unit.

The Proforma Invoice can be previewed, printed or saved to PDF, if required.

The following demonstrates the invoicing of the second rental period, for the unit that was shipped out.

Click on the field **Posting Date**

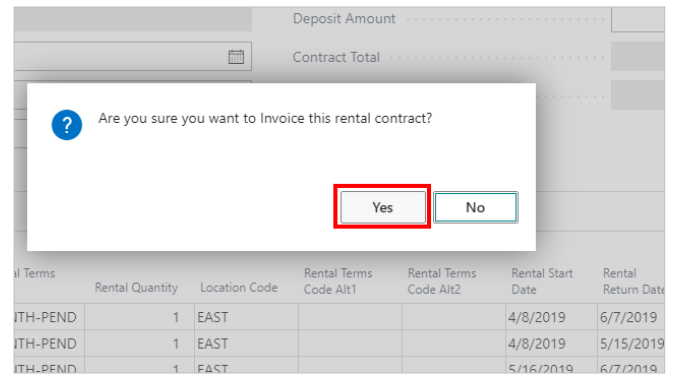
Ensure the Posting Date is set to the date on which the invoice is to be posted.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Invoice**

The menu option of Invoice and Print can be selected to print the invoice at the same time as the posting.

Click on the button **Yes**

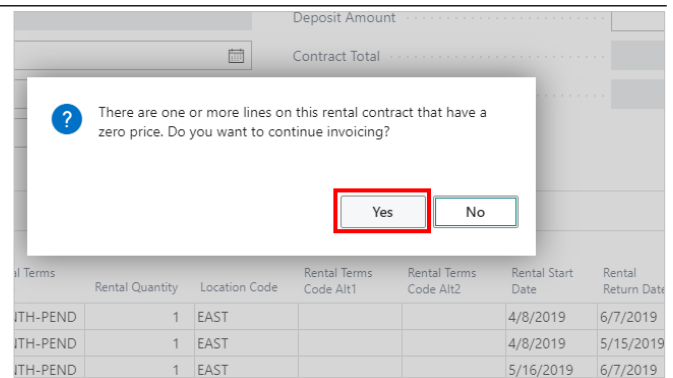


Are you sure you want to Invoice this rental contract?

Yes No

Rental Terms	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
ITH-PEND	1	EAST			4/8/2019	6/7/2019
ITH-PEND	1	EAST			4/8/2019	5/15/2019
ITH-PEND	1	EAST			5/16/2019	6/7/2019

Click on the button **Yes**

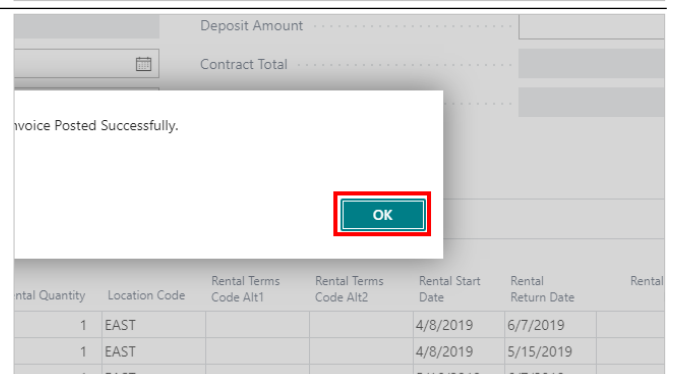


There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

Rental Terms	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
ITH-PEND	1	EAST			4/8/2019	6/7/2019
ITH-PEND	1	EAST			4/8/2019	5/15/2019
ITH-PEND	1	EAST			5/16/2019	6/7/2019

Click on the button **OK**



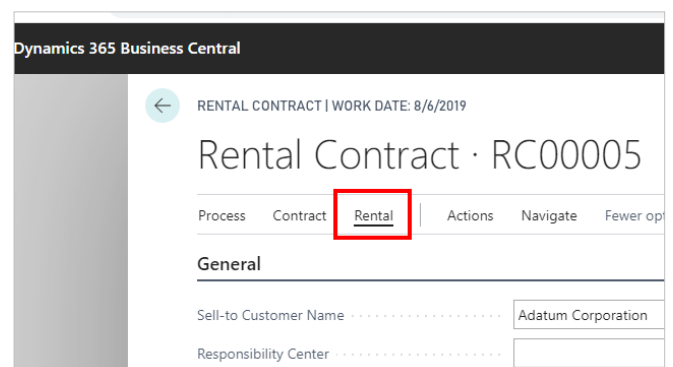
Invoice Posted Successfully.

OK

Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental
1	EAST			4/8/2019	6/7/2019	
1	EAST			4/8/2019	5/15/2019	
1	EAST			5/16/2019	6/7/2019	

The Posted Rental Invoice can be saved to PDF, printed or previewed using the following steps.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 8/6/2019

Rental Contract · RC00005

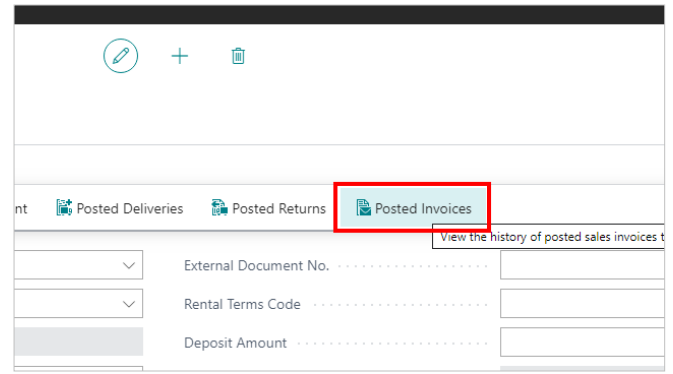
Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Responsibility Center

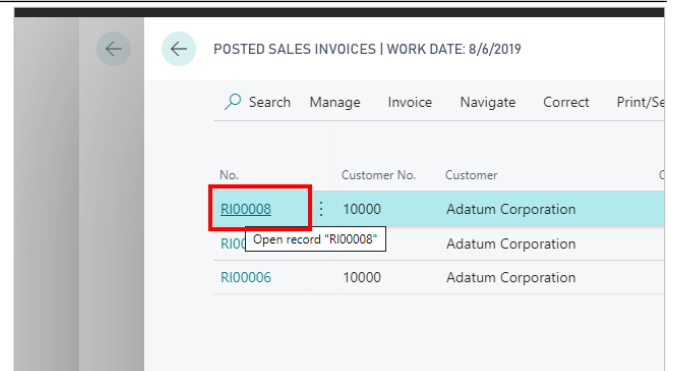
Click on the navigation menu item **Posted Invoices**



The screenshot shows the top navigation bar with icons for edit, add, and delete. Below the bar, the 'Posted Invoices' menu item is highlighted with a red box. To the right of the menu item is a link that says 'View the history of posted sales invoices t'. Below the menu item are three input fields: 'External Document No.', 'Rental Terms Code', and 'Deposit Amount'.

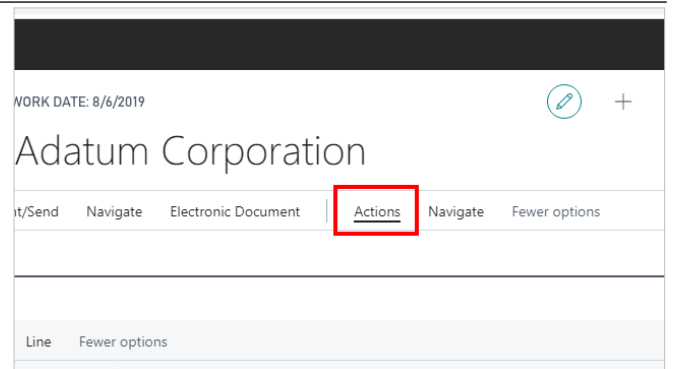
There are 3 invoices in the list, consisting of the invoice posted for the first rental period, the invoicing of the usage on the unit to be returned during the swap, and an invoice for the second rental period.

Click on the link in cell **No.** with the value **RI00008**



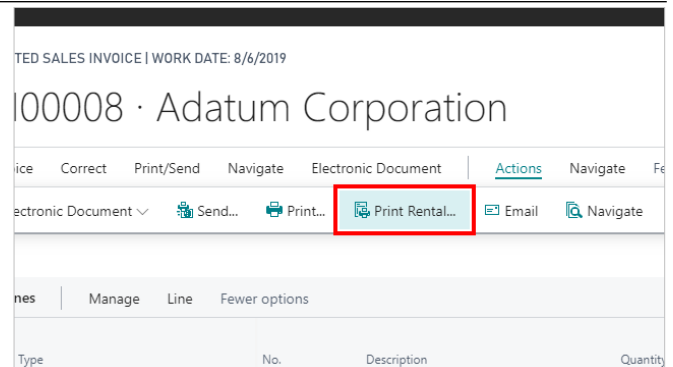
The screenshot shows a table titled 'POSTED SALES INVOICES | WORK DATE: 8/6/2019'. The table has columns: 'No.', 'Customer No.', and 'Customer'. The first row has 'RI00008' in the 'No.' column, '10000' in the 'Customer No.' column, and 'Adatum Corporation' in the 'Customer' column. The 'RI00008' link is highlighted with a red box. Below the first row, there is a link that says 'Open record "RI00008"'. The second row has 'RI00006' in the 'No.' column, '10000' in the 'Customer No.' column, and 'Adatum Corporation' in the 'Customer' column.

Click on the navigation menu item popup **Actions**



The screenshot shows the 'Adatum Corporation' invoice page. The top navigation bar has a link that says 'Actions' highlighted with a red box. Below the navigation bar, there is a table with columns: 'Line' and 'Fewer options'.

Click on the link **Print Rental Invoice.**



The screenshot shows the 'Print Rental Invoice' page. The top navigation bar has a link that says 'Print Rental...' highlighted with a red box. Below the navigation bar, there is a table with columns: 'Type', 'No.', 'Description', and 'Quantity'.

Complete the Options tab, then select the preferred option at the bottom of the request page, selecting either Send to, Print or Preview. Then select OK.

The Rental Unit still on rent can now be returned to complete the contract.

4.3. Rental Packages

4.3.1. Rental Packages Overview

4.3.1.1. Overview

The Rental Packages functionality provides the ability to create kits comprised of components. Components which can be specified in a package include Rental Unit Groups, Rental Units, Standard Text Codes and descriptive comments.

A package can as well be created as a template package with only a descriptive comment and the rental components can be inserted into the package on the quote or contract rental lines to build the package.

The Rental Packages provides the capability to create 2 types of packages, which are based on how the pricing occurs.

- Price Allocation packages, where the package rental unit price per rental period of the package is allocated to the components in the package.
- Roll-up Price packages, where the package unit price per rental period is the sum of the rental unit prices on the component lines.

For both types of packages:

- The rental term on the package rental line defaults to the component lines. The component lines cannot have a different rental term than the package line.
- The components can be returned on dates equal to or earlier than the return date on the package rental line.

The ability to switch the type of package on it has been entered on a Rental Line is available. The field, Use Roll-up Pricing, can be added to the line using Personalize, which can be modified to change the type of package.

Rental Packages can be renumbered using the Renumber Rental Package menu option located in the Home menu.

On the Rental Package Lines the Rental Package No. will be updated, the Rental Prices, Rental Sales Kits, and if applicable, the Metered Usage Ledger Entries will be updated to contain the new Rental Package No.

On open and completed Rental Quotes and Rental Contracts the Rental Unit No. field on Rental Lines containing the initial Rental Package No. will be updated.

NOTE:

- Rental Swapping, Sub Rentals and Undo Shipment features can be used in packages.
- With Price Allocation Packages when Undo Shipment is ran, it runs for all component rental units. With Roll-up Packages the Undo Shipment can be ran on individual component rental units in the package.
- Metered Usage package pricing can only be used with Price Allocation packages.
- When a meter reading or metered usage is entered on component units' lines in a package, they are recorded only as adjustments for tracking the usage for maintenance purposes. Metered usage cannot be billed to the customer for the component unit rental lines of a rental package
- Rental Sales Kits can be setup on the Rental Packages.

To learn about these features, see ODT Rental Online Help, Additional Rental Processes.

The following rental features cannot be used with Rental Packages:

- Periodic Usage and Standby Charges are not available for use with Rental Packages.
- Hybrid Hourly rental terms and pricing cannot be used with rental packages.

- Additional Notes cannot be added to package. Rental component units, additional notes function as

standard additional notes.

- The Auto Credit Memo functionality cannot be used with Price Allocation packages. The Auto Credit Memo functionality can be used with Roll-up Pricing packages.

4.3.1.2. Price Allocation Rental Packages Overview

Rental Prices are assigned to the Rental Package in the same manner in which they are assigned to rental units. However, only a rental price and metered usage prices can be setup on Rental Packages.

Rental Packages provide the options to lock the package, lock the price, and allow or disallow discounts. On the unit group or unit components in the package, the quantity can be locked, specify that zero price is allocated to a unit group/unit and specify that the record is not to print on rental documents.

On the rental quote and contract rental lines, the Rental Package price will be displayed in the Package Line Amount Excl. Tax field. If metered usage pricing has been setup on a package, the metered usage price fields can be added to the line and the prices can be modified. When a Metered Usage Qty. is entered, which populates the Billable Metered Usage Qty., then Rental Amount Lines will be created for the package line.

The rental unit price setup on the package is not posted to the package itself but is allocated to the component rental units. For the rental lines of the package components, the allocated rental unit price will be displayed in the Package Line Amount Excl. Tax field.

These prices are for the internal revenue allocation of the rental package price and are not shown on the rental documents.

The rental components of a package can be returned as a whole or individually.

Should a rental unit component of the package be returned early, the Rental Package Price continues to be allocated to the rental unit as long as there are other components of package still out on rent.

As posting of the revenue to the G/L accounts is based on the component lines, a difference of a few cents can occur between the sum of the calculated revenue per rental line for revenue allocation and the Rental Package - Rental Price setup.

Therefore, on the applicable Customer Posting Groups, the Rental Package Rounding Acc. No. field must be populated to manage this difference and ensure that invoicing will match the Package Price setup on the Rental Package.

IMPORTANT NOTE:

The G/L Account cannot be the same G/L Account as the Invoice Rounding G/L Account.

The G/L Account for the Package Rounding must allow for Direct Posting.

The rounding amount can occur when the allocation of the Package Price to the group and unit components results in a multi-decimal places factor, which is used to adjust the rental unit component Rental Unit Price.

When this occurs and an invoice is posted, then on the Posted Sales Invoice, a line will be automatically created for the variance to the G/L Account specified in the Customer Posting Groups, Package Rounding Acc. No. field. On the Posted Rental Invoice, the variance will print in the Sales Charges section.

4.3.1.2.1. Example of the Package Price Allocation

In this example the Rental Package Price is 950.00 for a monthly periodic end rental term.

The package has a component of a Rental Unit Group with a rental quantity of 2 and a single unit with a rental quantity of 1. The rental unit group has a price of 300.00 for the monthly periodic end term and the single rental unit has a price of 400.00 for the same term.

The Package Price allocation factor is determined as package price divided by the sum of the child and single unit component lines.



The sum of component lines: $(300.00 \text{ times } 2) \text{ plus } 400.00 = 1,000.00$.

Thus, for the example, the factor would be calculated as $950.00 \text{ divided by } 1000.00 = 0.95$.

The group, its' child lines and the single unit Rental Unit Prices would be revised to be as follows:

Group and child lines: $300.00 \text{ times } 0.95 = 285.00$

The single unit line: $400.00 \text{ times } 0.95 = 380.00$

The sum of the lines would then be $285.00 \text{ plus } 285.00 \text{ plus } 380.00 = 950.00$, which equals the rental package price.

NOTE:

When a Rental Term with Optimization is used, the Alt1 Unit Price and Alt2 Unit Price are revised based on their relationship to the Rental Unit price on the rental line prior to the revenue allocation calculation.

For example, if the term on the line is a monthly optimized term, and there is an Alt1 weekly optimized term and Alt2 daily optimized term. A factor is calculated against the monthly term for both the Alt1 and Alt2 prices.

The factors are calculated as Alt1 price divided by Rental Unit Price and Alt 2 price divided by Rental Unit Price.

After the Rental Unit price is revised during the rental package revenue allocation for the monthly term, then these Alt1 and Alt2 factors are applied to Alt1 and Alt2 unit prices on the rental line.

4.3.1.3. Roll-up Pricing Rental Packages Overview

The Roll-up packages enables the billing of a customer based on the detail of each Rental Contract line but print Package Lines on Rental Documents either as one summary line, or with the detail for each Rental Contract Line.

A roll-up package can be created containing Rental Units that are usually rented out together, but not all necessarily delivered or returned at the same time.

A template rental package can be created where the rental package lines contain only a descriptive comment, and package can be built directly on the rental lines by inserting the groups and/or units into the package on a Rental Quote or Rental Contact.

Roll-up Pricing packages provide the option to allow or disallow discounts. The package cannot be locked, nor can the price be locked.

On the unit group or unit components setup on the package, the quantity can be locked, and if required, specify that zero price is allocated to a unit group/unit.

With Roll-up Pricing Packages, the specification of a default Rental Term on the package is optional.

Rental Price cards are not configurable on Roll-up packages as the package price is the sum of the component prices per rental period.

The rental groups and rental units that are setup on a roll-up package or inserted into a package on the rental lines do not require that rental price cards exist on the groups or units. The Rental Unit Price for the groups and units can be entered on the component lines in a roll-up package.

With Roll-up Rental Packages the Rental Unit Price is not displayed on the package rental line as the package price for each rental period or invoice is the sum of the amounts that would be billed for the component lines.

4.3.1.3.1. Examples of the Roll-up Pricing

Example 1:



The package components contain a Rental Unit Group with a rental quantity of 2 and a single unit with a rental quantity of 1. The rental unit group has a price of 300.00 for the monthly periodic end term and the single rental unit has a price of 400.00 for the same term.

The component lines contain the same Rental Start Date, Rental Billing Start Date, Rental Return Date and Rental Billing End Date.

The sum of component lines is: (300.00×2) plus 400.00 = 1,000.00.

When rental documents are printed the Roll-up Package line on the document will have a Total Price of 1,000.00 for each rental period invoiced.

Example 2:

The package components contain a Rental Unit Group with a rental quantity of 2 and a single rental unit with a quantity of 1. The rental unit group has a price of 100.00 and the single rental unit has a price of 200.00 for the daily periodic end term.

The rental package line and the rental group and child unit lines have a Rental Start Date and a Rental Billing Start Date of April 12. The Rental Return Date and Rental Billing End Date of May 15.

The single rental unit has a Rental Start Date and a Rental Billing Start Date of April 12. The Rental Return Date and Rental Billing End Date of April 28.

For the Rental Quote or Rental Contact documents, when printed the Roll-up Package line on the document will have a Total Price of 10,200.00.

The package price being calculated as $(100.00 \times 2 \times 34 \text{ days})$ for the group plus $(200 \times 1 \times 17 \text{ days})$ for the single rental unit.

If an invoice was posted on April 30, the sum of the component lines would be $(100.00 \times 2 \times 19 \text{ days})$ for the group child unit lines, plus $(200.00 \times 1 \times 17 \text{ days})$ for the single unit = 7,200.00.

The Roll-up Package line on the rental invoice would have a Total Price of 7,200.00.

4.3.1.4. Switching the Type of Package on the Rental Line

The switching of the type of pricing package on the package Rental Line is accomplished by either checking or clearing the Use Roll-up Pricing field.

This field is available to add to the Rental Line using Personalize.

Once any shipping has been done, in order to switch the type of package, Undo Shipment must be ran.

For a Price Allocation package that was shipped, the Undo Shipment must be ran.

For a Roll-up Pricing package, the Undo Shipment must be ran on all component rental lines that were shipped.

When the package entered on the rental line is a Price Allocation package the field will be not be checked, and the Rental Unit Price field will be populated with the package price for the rental term on the line.

When the package entered on the rental line is a Roll-up Pricing package the field will be checked, and the Rental Unit Price will not be populated on the package rental line.

Switching the type of package cannot be done once an invoice has been posted.

The switching can only be done prior to shipping a Price Allocation package or shipping any of the Roll-up Pricing package components.

When the package on the rental line is a Price Allocation package and the Use Roll-up Pricing field is subsequently checked, the following will occur:

- The Rental Unit Price on the rental package line will be set to zero
- The component group and unit lines, Rental Unit Price, will be reset to their original prices from their price

cards for the rental term on the line

When the package entered on the rental line is a Roll-up Pricing package and subsequently the Use Roll-up Pricing field is cleared, then the following will occur:

- The Rental Unit Price on all component rental lines will be set to zero until a Rental Unit Price for the package is entered on the package rental line.
- Once the package Rental Unit Price is entered, the price will be allocated to the components, Rental Unit Price.
- If any component group or rental unit does not have a rental price card for the term on the rental line, then the Rental Unit Price will remain as zero.

4.3.1.5. Printing Rental Documents with Rental Packages

When printing rental documents an option, Show Rental Details, is provided for choosing whether the Rental Quote, Rental Contract, Proforma Invoice and Posted Rental Invoice are to print in a summarized manner or detailed manner.

When the Show Rentals Details is set to No on the printing request page, then only the Rental Package line with description, quantity, package pricing and Total Price will be printed for each rental package on the rental lines.

When the Show Rentals Details is set to Yes, then for Price Allocation Rental Packages the package components lines will be shown below the Rental Package line with only quantity for individual components. Unit Pricing and Totals will not be displayed for any of the component lines.

When the Show Rentals Details is set to Yes, then for Roll-up Pricing Rental Packages the package components lines will be shown below the Rental Package line with the date range, quantity, and pricing details for each of the individual components.

For Price Allocation Rental Packages, the calculated rounding amount prints in the Sales Charges section on the Proforma Invoice and the Posted Rental Invoice.

NOTE:

The Rental Invoice Rounding amount is always added to the Amount Exempt from Sales Tax as per standard Dynamics 365 Business Central sales documents.

4.3.2. How to Set Up Rental Packages

4.3.2.1. Overview

Setup for using Rental Packages consists of:

- Setting up a No. Series for Rental Packages and updating Rental Management Setup
- G/L Account setup for Rental Package Rounding and updating the Customer Posting Group(s) when using Price Allocation Rental Packages
- Setting up Rental Packages
- Setting up Rental Prices on Packages only when using Price Allocation Packages

NOTE:

When a unit or unit group with Metered Usage or Periodic Usage is selected to be added as a component, then a message will occur.

The message when adding a group or unit with Periodic Usage and Standby Charge pricing is similar to the message below.

Example of a message when adding a group or unit with Metered Usage pricing:



Rental Unit SRU00103 is setup for Metered Usage Enabled, therefore metered usage transactions will be recorded as adjustments. Billing of metered usage is not allowed on rental package components. Do you want to include the unit in the package?

Rental Sales Kits can be setup on Rental Packages.

To learn about Rental Sale Kits, please see the related help located in the Additional Processes.

4.3.2.2. No. Series and Rental Management Setup

No. Series for Rental Packages:

The setup of separate No. Series for Rental Packages is optional. If not setup, then the Rental Unit No. Series specified on Rental Management Setup, will be used when creating Rental Packages.

If a separate No Series is setup for Rental Packages, then the Rental Management Setup, Numbering tab field Rental Package Nos. must be populated in order for this No. Series to be used.

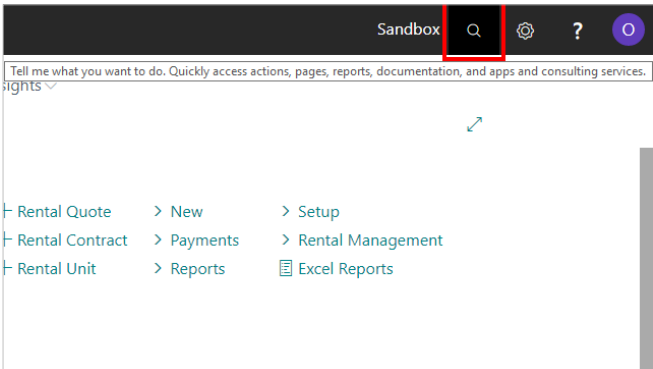
NOTE:

If the Manual field on the No. Series is set to yes, then unique codes per package can be entered when setting up Rental Packages.

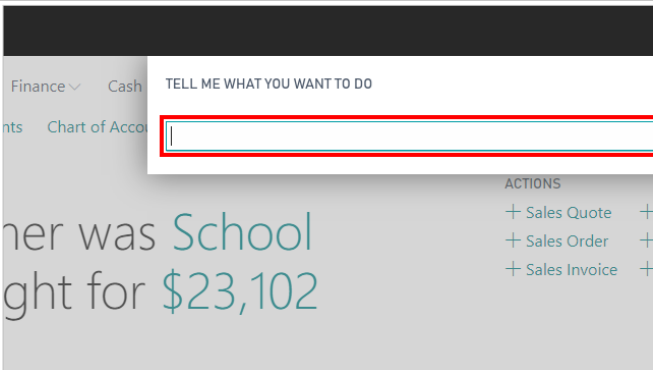
Business Manager Profile

The following demonstrates the setup of a No. Series record for Rental Packages when an organization wants a separate No. Series for packages.

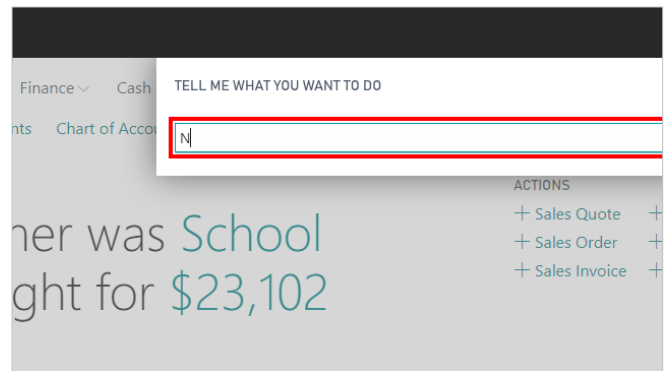
Click on the link



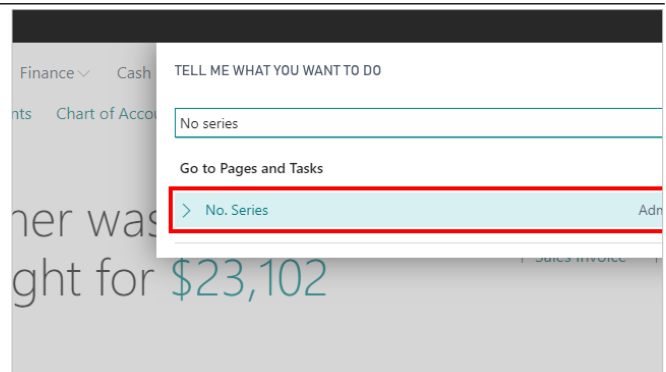
Click on the field **Type to start search:**



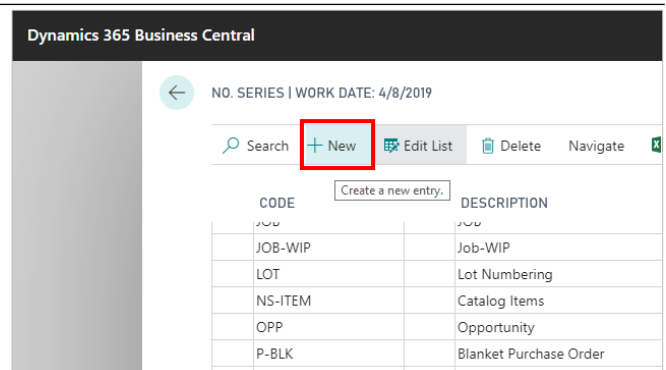
Enter the text **No series**.



Click on **No. Series Administration**



Click on the link **New**



Click on the cell **Code**

CODE	DESCRIPTION
JOB-WIP	Job-WIP
LOT	Lot Numbering
NS-ITEM	Catalog Items
OPP	Opportunity
P-BLK	Blanket Purchase Order
P-QUO	Purchase Quote
P-RCPT	Purchase Receipt
P-RETORD	Purchase Return Order
P-SHPT	Posted Purchase Shipment
RENT-CONT	Rental Contracts
RENT-DEL	Rental Delivery
RENT-INV	Rental Invoices
*RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units
RES	Resource
S-BLK	Blanket Sales Order
S-CR	Sales Credit Memo



ODT Rentals Online Help

Enter the text **Rent pkgs.**

P-QUO	Purchase Quote
P-RCPT	Purchase Receipt
P-RETORD	Purchase Return Order
P-SHPT	Posted Purchase Shipment
RENT-CONT	Rental Contracts
RENT-DEL	Rental Delivery
RENT-INV	Rental Invoices
* R	
RENT-QTE	Rental Quotes
RENT-RTN	Rental Returns
RENT-UNIT	Rental Units
RES	Resource
S-BLK	Blanket Sales Order
S-CR	Sales Credit Memo

Click on the cell **Description**

O	Purchase Quote	1001
T	Purchase Receipt	107001
ORD	Purchase Return Order	1001
T	Posted Purchase Shipment	105001
-CONT	Rental Contracts	-
-DEL	Rental Delivery	-
-INV	Rental Invoices	-
nt pkgs		
-QTE	Rental Quotes	-
-RTN	Rental Returns	-
-UNIT	Rental Units	-
	Resource	R0010
	Blanket Sales Order	1001
	Sales Credit Memo	S-CR1001

Enter the text **Rental Packages.**

O	Purchase Quote	1001
T	Purchase Receipt	107001
ORD	Purchase Return Order	1001
T	Posted Purchase Shipment	105001
-CONT	Rental Contracts	-
-DEL	Rental Delivery	-
-INV	Rental Invoices	-
PKGS		
-QTE	Rental Quotes	-
-RTN	Rental Returns	-
-UNIT	Rental Units	-
	Resource	R0010
	Blanket Sales Order	1001
	Sales Credit Memo	S-CR1001

Click on **Default Nos.**

	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15/2019	107208	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	-	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ODT Rentals Online Help

Click on **Manual Nos.**

The selection of Manual is optional.
This field would only be checked, if the organization prefers to have unique codes for the Rental Packages that are not sequential.

		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
107208		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on the link **Navigate**

No. Series WORK DATE: 4/8/2019		
Search	+ New	Edit List Delete Navigate Open in Excel More options
CODE	DESCRIPTION	STARTING NO.
JOB-WIP	Job-WIP	WIP000000
LOT	Lot Numbering	LOT0001
NS-ITEM	Catalog Items	NS0001
OPP	Opportunity	OP000001
P-BLK	Blanket Purchase Order	1001

Click on the link **Lines**

Dynamics 365 Business Central		
NO. SERIES | WORK DATE: 4/8/2019		
Search	+ New	Edit List Delete Navigate
Lines	Relationships	
View or edit additional information about the number series lines.		
JOB-WIP	Job-WIP	
LOT	Lot Numbering	
NS-ITEM	Catalog Items	
OPP	Opportunity	
P-BLK	Blanket Purchase Order	

Click on the cell **Starting No.**

No. Series Lines				
Search	+ New	Edit List	Delete	Open in Excel
STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED



Enter the text **RP00001**.

ch + New

DE

3-WIP

T

-ITEM

P

BLK

R

R+

YS-INV

YS-INV+

No. Series Lines

Search + New Edit List Delete Open in Excel

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED
	RP			

Click on the cell **Ending No.**

No. Series Lines

Search + New Edit List Delete Open in Excel

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	RP00001				

Enter the text **RP99999**.

No. Series Lines

Search + New Edit List Delete Open in Excel

STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNI NO.
	RP00001	RP			

Click on the back button

Central

RONUS ← NO. SERIES | WORK DATE: 4 ← RENT PKGS · RENTAL PACKAGES | WORK D

Customers

ISIGHT FRI

You of F

CODE

JOB-WIP

LOT

NS-ITEM

OPP

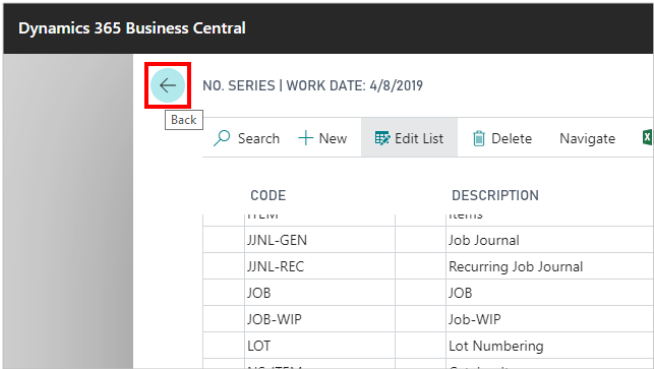
P-BLK

No. Series Lines

Search + New Edit List

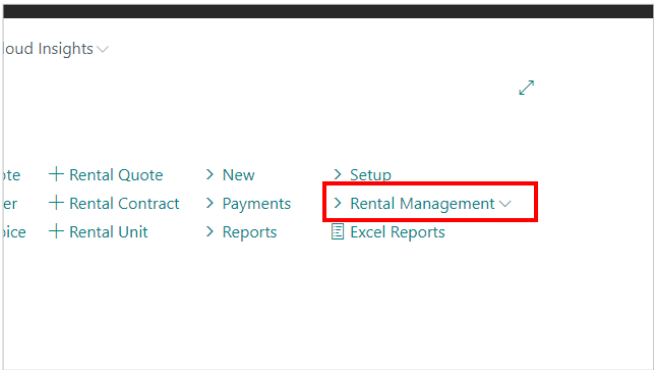
STARTING DATE	STARTING NO.	END NO.
	RP00001	RP99

Click on the back button

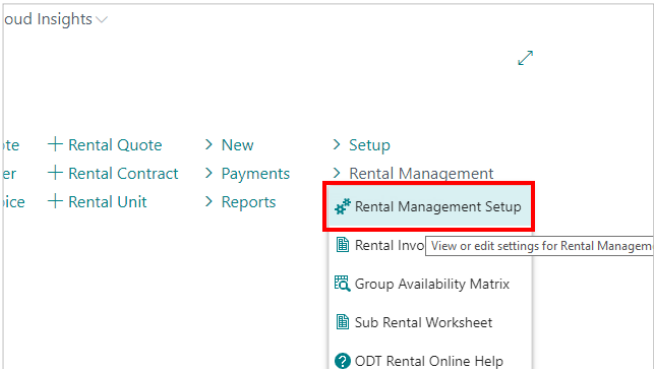


The following demonstrates the updating of the Rental Management Setup for the Rental Package No. Series Code.

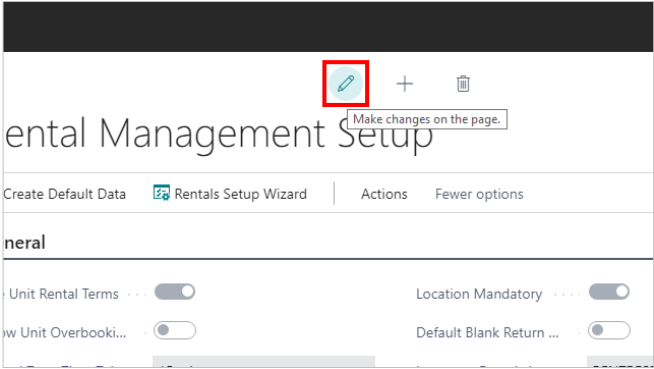
Click on the link **Rental Management**



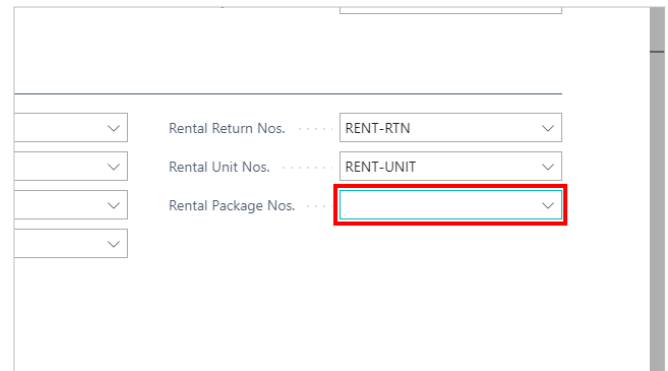
Click on the link **Rental Management Setup**



Click on the action toggle **edit/view**

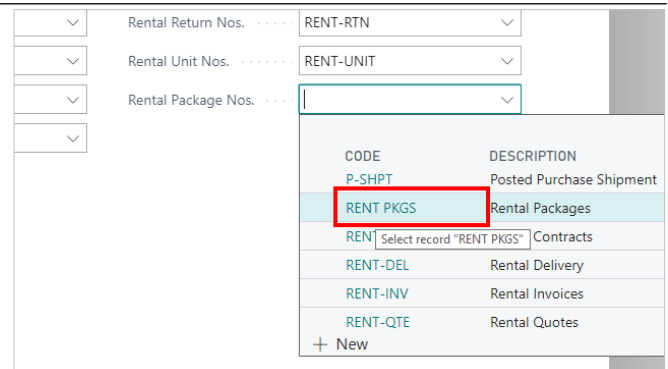


Click on the field **Rental Package Nos.**



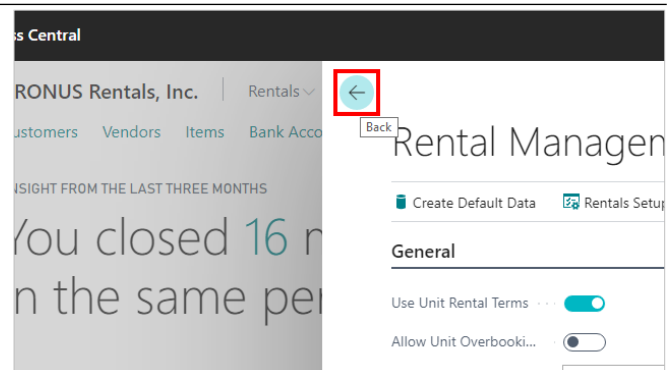
A screenshot of a web application showing a dropdown menu for 'Rental Package Nos.'. The dropdown is open, showing a list of options. The option 'RENT PKGS' is highlighted with a red box. Above the dropdown, there are other dropdown menus for 'Rental Return Nos.' (set to 'RENT-RTN') and 'Rental Unit Nos.' (set to 'RENT-UNIT').

Click on **Code = RENT PKGS, Description = Rental Packages**



A screenshot of the same web application showing the 'Rental Package Nos.' dropdown menu. The option 'RENT PKGS' is selected and highlighted with a red box. The dropdown menu is open, showing a list of options with their corresponding descriptions. The options are: 'P-SHPT' (Posted Purchase Shipment), 'RENT PKGS' (Rental Packages), 'REN' (Select record "RENT PKGS" Contracts), 'RENT-DEL' (Rental Delivery), 'RENT-INV' (Rental Invoices), and 'RENT-QTE' (Rental Quotes). There is also a '+ New' button at the bottom.

Click on the back button



A screenshot of the 'Rental Manager' page in the Dynamics 365 Business Central application. The page shows a list of rental packages. A red box highlights the 'Back' button in the top right corner of the page. The page also shows a 'General' section with a toggle for 'Use Unit Rental Terms' and a dropdown for 'Allow Unit Overbook...'.

4.3.2.3. G/L Account and Updating Customer Posting Groups

Overview:

To manage the invoice rounding for Price Allocation Rental Packages and to ensure the price invoiced for a rental package matches the setup price, the G/L Account must be specified on the Customer Posting Groups to where the rounding is to be posted to.

G/L Account Setup:

The setup of the G/L Account for the Rental Packages is not demonstrated here. To learn about setting up G/L Accounts, see the Dynamics 365 Business Central help.

IMPORTANT

- The G/L Account to which the rounding is to be posted to must have the Direct Posting field set to Yes.
- The General Product Posting Group should be populated if a unique group is used for rentals.
- The G/L Account selected in the Package Rounding Account cannot be the same account as specified in the Invoice Rounding Account field in the Customer Posting Groups.

Updating the Customer Posting Groups:

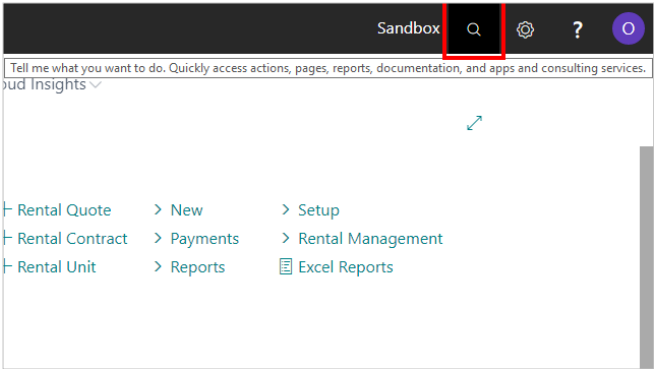
Business Manager Profile

For the following example, a G/L Account called Rental Package Rounding was created in advance.

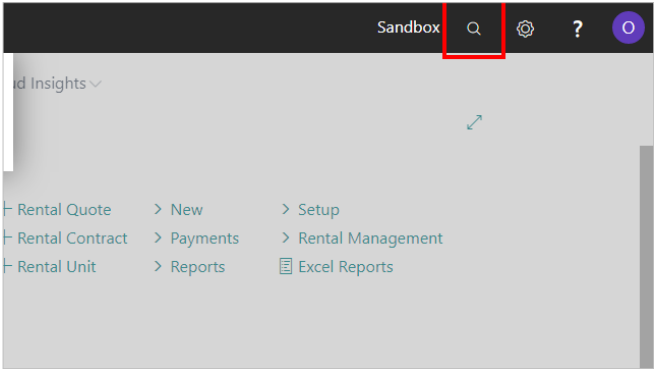


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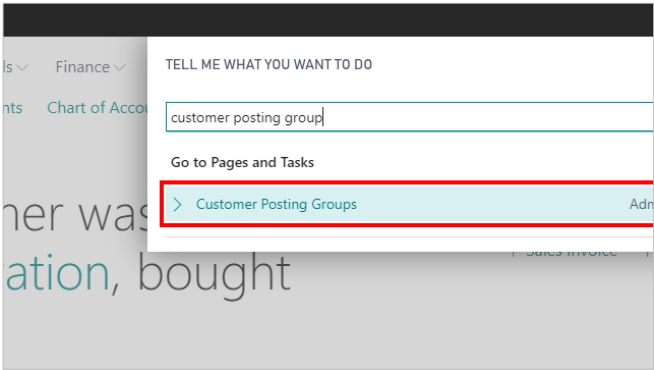
Click on the link



Enter the text **customer posting group**.



Click on **Customer Posting Groups Administration**



Click on the cell **Rental Package Rounding Acc. No.**

CREDIT ROUNDING ACCOUNT	PAYMENT TOLERANCE DEBIT ACC.	PAYMENT TOLERANCE CREDIT ACC.	RENTAL PACKAGE ROUNDING ACC. NO.
61900	40500	40500	
61900	40500	40500	



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Click on the link in cell **No.** with the value **61950**

ACCOUNT	RNDG. ACC.	RNDG. ACC.	ACCOUNT	ACCOUNT	DEBIT ACC.	C
61900	61900	61900	61900	61900	40500	40
61900	61900	61900				
			NO.	NAME		IN
			61700	Federal Income Tax Expense		IN
			61800	State Income Tax Expense		IN
			61900	Rounding		IN
			61950	Rental Invoice Rounding		IN
			61995	EXPENSES		IN
			61995	NET INCOME		IN
			+ New			

Click on the cell **Rental Package Rounding Acc. No.**

CREDIT ROUNDING ACCOUNT	PAYMENT TOLERANCE DEBIT ACC.	PAYMENT TOLERANCE CREDIT ACC.	RENTAL PACKAGE ROUNDING ACC. NO.
61900	40500	40500	61950
61900	40500	40500	

Click on the link in cell **No.** with the value **61950**

61900	61900	61900	61900	61900	40500	40
61900	61900	61900	61900	61900	40500	40
			NO.	NAME		IN
			61700	Federal Income Tax Expense		IN
			61800	State Income Tax Expense		IN
			61900	Rounding		IN
			61950	Rental Invoice Rounding		IN
			61995	EXPENSES		IN
			61995	NET INCOME		IN
			+ New			

Click on the back button

Dynamics 365 Business Central				
← CUSTOMER POSTING GROUPS | WORK DATE: 4/9/2019				
Select	Search	+ New	Edit List	Delete Edit
Show All Accounts				
CODE	SERVICE CHARGE ACC.	PAYMENT DISC. DEBIT ACC.	PAYMENT DISC. CREDIT ACC.	

4.3.2.4. Rental Package Fields

The following picture displays the Rental Package card.



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Time, which will update all component lines for rental unit groups and units.

- Package Line Amount Excl. Tax field, which contains the Package Price when using Price Allocation packages. When modified will recalculate the component unit price for revenue allocation. This field is not populated when using Roll-up Pricing Rental Packages.

NOTE:

The Package Line Amount Excl. Tax field must be added to the Rental Lines using Personalize when an organization is using Price Allocation Rental Packages.

On the Rental Line for the component units in a locked package, the fields which can be modified include:

- Location Code
- Vendor No. which is used with Sub rentals. This field must be added using Personalize when Sub Rentals are used.
- Sub Rental Description, which is used with Sub rentals. This field must be added using Personalize when Sub Rentals are used.

Additional information on editing locked packages:

- Package component lines cannot be deleted.
- Package component lines cannot be added.
- Package component lines, Standard Text Code and extended text cannot be modified or deleted.
- Package component lines, description field comment cannot be modified or deleted.
- **Price Locked:** If the Price Locked is checked, then the Package Price cannot be modified by the user on the rental line. This field can only be enabled for Price Allocation Rental Packages.
- **Allow Discounts:** The Allow Discounts field is set to Yes by default, however, can be overridden should discounts not be allowed for the package being setup. This field is related to Line Discounts only. Invoice discounts are not allowed.
- **Use Roll-up Pricing:** Specifies whether the Rental Package will be based on Price Allocation or be based on Roll-up Pricing. When enabled rental price cards are not setup and the package price is the sum of the component's prices.

When disabled, the package pricing will be based on Price Allocation, where the price is setup on the rental price cards of the Rental Package and the price will be allocated to the components of the package.

- **Rental Terms Code:** The entry of a Rental Terms Code is only mandatory when the package is a Price Allocation Package. When the package has Roll-up Pricing enabled the entry of a Rental Terms Code is optional.

Usage Tab:

Metered Usage package pricing can only be used with Price Allocations packages.

- **Metered Usage Enabled:** This field is used to specify whether Metered Usage is required for the Rental Package.
- **Metered Usage Base UOM Code:** This field is used to specify the Base UOM (unit of measure) for tracking metered usage on the rental package. Examples for the Base UOM are miles, kilometers, and hours.
- **Copy Package Metered Usage to Lines:** Specifies whether metered usage entered on the rental package line is to be copied to the rental unit component lines that have the same usage unit of measure.



Posting Tab

- **General Product Posting Group:** Select the applicable group for determining in conjunction with the General Business Posting Group, the GL Accounts in General Posting Setup that are to be used in posting the allocated revenue.
- **Tax Group Code:** Select the applicable default Tax Group Code.

Rental Package Lines:

The Rental Package Lines is where the components of the package are setup. The components available consist of Rental Group, Rental Unit, Standard Text Codes, with and without extended text, and descriptive comments.

When the Rental Package is selected on the rental line, the components will default onto the rental lines directly below the rental package line, when moving off the package line.

Field Information for Rental Package Lines:

Type

- Select the applicable Type for the record. The types include Rental Group, Rental Unit and Comment. The type of Comment is used for Standard Text Codes and for description field comments on the rental lines.

No.

When using the look-up, the list displayed is based on the Type selected.

- For example, if the Type of Rental Group is selected, then a listing of all Rental Groups is displayed.

In order for the rental revenue to be allocated to the Rental Groups, child units and Rental Units entered individually the group and units not assigned to a group must have a Rental Price card setup for each Rental Price card setup on the Rental Package.

Otherwise a message will pop-up advising the group or unit will have a zero price and asking if the user would like to continue. If Yes is selected, then the Zero Price field will be automatically checked and cannot be unchecked. If No is selected, then the insertion of the group or unit will be aborted.

- **Description:** The Description field will be automatically populated with the Description from the rental product selected in the No. Field when Rental Group or Rental Unit is selected. The Description field can be overridden.

Should the Type selected have been "Comment", then if a Standard Text Code is to be added to the package, look-up and select the Standard Text Code in the No. field. If a descriptive comment is being added, then type the comment in the description field.

- **Quantity:** Enter the quantity of the rental group or unit that is to be included in the package. Should a rental unit be linked to a Fixed Asset the quantity defaults to 1 and cannot be changed and the Lock Quantity field is automatically checked.

Rental Units not linked to groups must have the Allow Overbooking set to Yes, to be able to enter a quantity greater than 1 in the package lines.

- **Lock Quantity:** If the Lock Quantity field is checked, then the quantity remains static, should the Rental Quantity on the Rental Package line is changed to be greater than 1. Otherwise when the Rental Quantity on the rental line for the package is changed, then the Rental Quantity for the component lines will be incremented as well.

For example:

If the Lock Quantity is not checked and a Rental Unit Group component has a quantity of 2 in the rental package lines, and on the rental line for the package the Rental Quantity of 2 is entered, then on the Rental Unit Group line the Rental Quantity will automatically change to 4 and additional child lines will be inserted.



When the Lock Quantity is checked, then on the Rental Unit Group line, then the Rental Quantity will remain as 2.

- **Zero Price:** When this field is checked on a record, then when the package lines are populated when the package is selected, this component Rental Unit Price will automatically be set to zero. Thus no rental revenue will be posted to the rental unit or rental units in a group.
- **Do not Print:** This field is used to specify whether the component line is to print on the rental documents. When checked the component will not print on the rental documents.

4.3.2.5. **How to Setup a Price Allocation Rental Package Excluding Metered Usage**

Overview

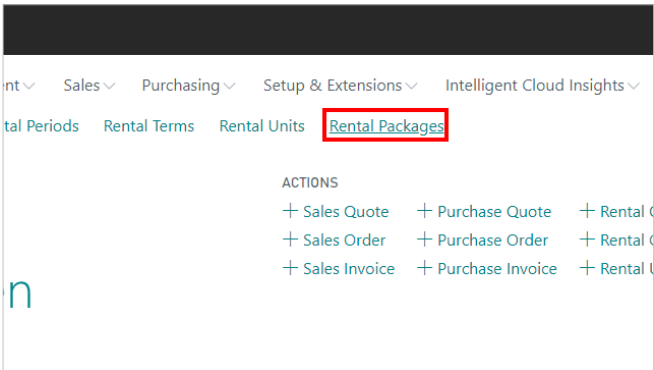
The setting up of Rental Packages consists of setting up the card with the applicable options, adding components to the Rental Package Lines and setting up Rental Price cards on the Rental Packages.

In the following example, a Rental Package will setup with the following components and will not be setup to include Metered Usage

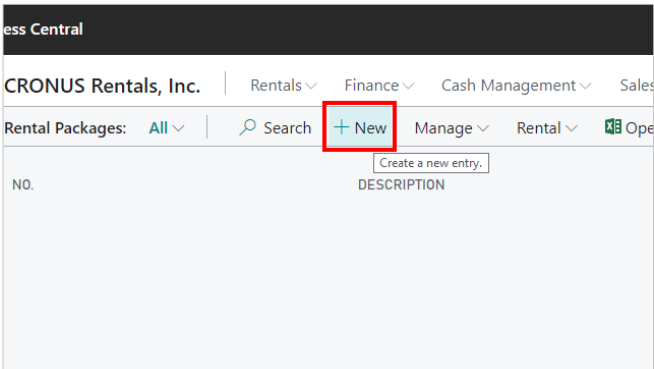
- Mini Excavator Group with a Quantity of 2
- A Descriptive comment: Daily equipment inspections are mandatory.
- A Descriptive comment: Inspection checklists must be completed and signed.
- Standard Bucket Group with a Quantity of 2, with Zero Price checked
- Vibrator Plate Group with a Quantity of 1, with Lock Quantity checked
- A Standard Text Code, Rental Returns
- In addition, the package will not be locked, nor will the price be locked.

Business Manager Profile

Click on the navigation menu item **Rental Packages**



Click on the link **New**





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Click on the field **No.**

The Rental Package number will automatically populate from the No. Series when the user moves off the field.

The screenshot shows the 'Rental Package' form. The 'No.' field is highlighted with a red box. The form includes sections for 'General' and 'Posting'. The 'No.' field is a dropdown menu with a search icon and a list of options. The 'Description' field is also visible. The 'Package Locked' toggle is turned on. The 'Posting' section is partially visible.

Click on the field **Description**

The screenshot shows the 'Rental Package' form. The 'Description' field is highlighted with a red box. The 'No.' field is now populated with 'RP00001'. The 'Description' field is a text input field. The 'Package Locked' toggle is turned on. The 'Posting' section is partially visible.

Enter the text **Mini Excavator with Vibrator Plate.**

The screenshot shows the 'Rental Package' form. The 'Description' field now contains the text 'Mini Excavator with Vibrator Plate.'. The 'No.' field is still populated with 'RP00001'. The 'Package Locked' toggle is turned on. The 'Posting' section is partially visible.

Click on the field **Rental Terms Code**

The screenshot shows the 'Rental Package' form. The 'Rental Terms Code' field is highlighted with a red box. The 'Description' field still contains the text 'Mini Excavator with Vibrator Plate.'. The 'No.' field is still populated with 'RP00001'. The 'Package Locked' toggle is turned on. The 'Posting' section is partially visible.



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Click on **Code = MONTH-PEND**, **Description = Monthly Rental - Per. Billing in Arrears**

Rental Terms Code

CODE	DESCRIPTION
MONTH-END-OPT	Monthly Rental for Optim
MONTH-END-OPT-TL...	Monthly Rental for Optim
MONTH-END-PRORATE	Monthly Rental for Prorat
MONTH-PEND	Monthly Rental - Per. Billi
MON	Select record "MONTH-PEND" Rental - Early Pe
MONTH-START	Monthly Rental - Per. Billi

+ New

DESCRIPTION QUANTITY LOCK QUAN... ZERO PRICE

Click on the field **Gen. Prod. Posting Group**

Description Mini Excavator with Vibrator Plate Allow Disc

Package Locked

Posting

Gen. Prod. Posting Gr... **Gen. Prod. Posting Group**

Tax Group Code

Rental Package Lines Manage

Click on **Code = RETAIL**, **Description = Retail**

Posting

Gen. Prod. Posting Gr...

Tax Group Code

CODE	DESCRIPTION
NO TAX	Miscellaneous without tax
RETAIL	Retail
SER	Select record "RETAIL" Resources, etc.

+ New

Rental Package Lines

TYPE	NO.	DESCRIPTION
Rental Group		

Click on the field **Tax Group Code**

Package Locked

Posting

Gen. Prod. Posting Gr... RETAIL

Tax Group Code **Tax Group Code**

Rental Package Lines Manage

TYPE	NO.	DESCRIPTION
------	-----	-------------



ODT Rentals Online Help

Click on **Code = SUPPLIES**, **Description = Taxable Olympic Supplies**

...

	CODE	DESCRIPTION
Rental Package Lines	FURNITURE	Taxable Olympic Furniture
	LABOR	Labor on Job
TYPE	MATERIALS	Taxable Raw Materials
Rental Group	NONTAXABLE	Nontaxable
	SUPPLIES	Taxable Olympic Supplies
	+ New Select record "SUPPLIES"	

Click on the cell **Type** with the value **Rental Group**
Rental Unit Comment

Tax Group Code SUPPLIES

Rental Package Lines | Manage

TYPE	NO.	DESC
Rental Group		

Click on the item Rental Group in the list

Rental Package Lines | Manage

TYPE	NO.	DESC
Rental Group		

Click on the cell **No.**

Posting >

Rental Package Lines | Manage

Type	No.	Description
→ Rental Group		



Click on the lookup button in the cell **No.**

Posting >

Rental Package Lines | Manage

Type	No.	Description
→ Rental Group	<input type="text" value=""/>	<input type="button" value="..."/>

Click on the link in cell **No.** with the value **RU00018**

RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00009	16 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00010	Framing Air Nailer Group	<input checked="" type="checkbox"/>
RU00011	Power Shovel Group	<input checked="" type="checkbox"/>
RU00012	Cut-Off Gasoline Saw GRP - Hybrid	<input checked="" type="checkbox"/>
RU00018	Mini Excavator Group	<input checked="" type="checkbox"/>
RU	Select record "RU00018"	
RU00020	Standard Bucket Grp for Mini Excavator	<input checked="" type="checkbox"/>
RU00020	Breaker Group for Mini Excavator	<input checked="" type="checkbox"/>
RU00021	Vibrator Plate Group for Mini Excavator	<input checked="" type="checkbox"/>

Click on the cell **Quantity** with the value **1**

IES

Manage

	DESCRIPTION	QUANTITY	LOCK QUA...	ZERO PRICE
0018	Mini Excavator Group	1	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Enter the text **2**.

IES

Manage

	DESCRIPTION	QUANTITY	LOCK QUA...	ZERO PRICE
0018	Mini Excavator Group	2	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>



Click on the cell **Type**

Rental Package Lines				Manage
TYPE	NO.	DESC		
Rental Group	RU00018	Mini E		

Click on the item **Comment** in the list

Rental Package Lines				Manage
TYPE	NO.	DESC		
Rental Group	RU00018	Mini E		
Rental Group				
Rental Group				
Rental Unit				
Comment				

Click on the cell **Description**

Rental Package Lines				Manage
TYPE	NO.	DESCRIPTION	QUANT	
Rental Group	RU00018	Mini Excavator Group		
Comment				

Enter the text **Daily equipment inspections are mandatory.**

Rental Package Lines				Manage
TYPE	NO.	DESCRIPTION	QUANT	
Rental Group	RU00018	Mini Excavator Group		
Comment		D		



Click on the cell **Type**

Rental Package Lines			Manage
TYPE	NO.	DESC	
Rental Group	RU00018	Mini E	
Comment		jipmer	

Click on the item **Comment** in the list

Rental Package Lines			Manage
TYPE	NO.	DESC	
Rental Group	RU00018	Mini E	
Comment		Daily e	
Rental Group			
Rental Unit			
Comment			

Click on the cell **Description**

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	QUANT
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment			

Enter the text **Inspection checklists must be completed and signed.**

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	QUANT
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment			



Click on the cell **Type**

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	

Click on the item Rental Group in the list

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	
Rental Group			

Click on the cell **No.**

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	
Rental Group			

Click on the lookup button in the cell **No.**

Rental Package Lines			Manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	
Rental Group			



Click on the link in cell **No.** with the value **RU00019**

RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00009	16 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00010	Framing Air Nailer Group	<input checked="" type="checkbox"/>
RU00011	Power Shovel Group	<input checked="" type="checkbox"/>
RU00012	Cut-Off Gasoline Saw GRP - Hybrid	<input checked="" type="checkbox"/>
RU00018	Mini Excavator Group	<input checked="" type="checkbox"/>
RU00019	Standard Bucket Grp for Mini Excavator	<input checked="" type="checkbox"/>
RU00020	Breaker Group for Mini Excavator	<input checked="" type="checkbox"/>
RU00021	Vibrator Plate Group for Mini Excavator	<input checked="" type="checkbox"/>

Click on the cell **Quantity** with the value **1**

Manage				
	DESCRIPTION	QUANTITY	LOCK QUA...	ZERO PRICE
0018	Mini Excavator Group	2	<input type="checkbox"/>	<input type="checkbox"/>
	Daily equipment inspections are ...	0	<input type="checkbox"/>	<input type="checkbox"/>
	Inspection checklists must be co...	0	<input type="checkbox"/>	<input type="checkbox"/>
0019	Standard Bucket Grp for Mini Exc...	1	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Enter the text **2**.

Manage				
	DESCRIPTION	QUANTITY	LOCK QUA...	ZERO PRICE
0018	Mini Excavator Group	2	<input type="checkbox"/>	<input type="checkbox"/>
	Daily equipment inspections are ...	0	<input type="checkbox"/>	<input type="checkbox"/>
	Inspection checklists must be co...	0	<input type="checkbox"/>	<input type="checkbox"/>
0019	Standard Bucket Grp for Mini Exc...	2	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Click on **Zero Price**

As no revenue is to be allocated to the standard bucket, as it is included with the Mini Excavator, the Zero Price field is checked.

	QUANTITY	LOCK QUAN...	ZERO PRICE	
roup	2	<input type="checkbox"/>	<input type="checkbox"/>	
inspections are ...	0	<input type="checkbox"/>	<input type="checkbox"/>	
lists must be co...	0	<input type="checkbox"/>	<input type="checkbox"/>	
Grp for Mini Exc...	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	



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Click on the cell **Type**

Rental Package Lines			manage
TYPE	NO.	DESCI	
Rental Group	RU00018	Mini E	
Comment		Daily e	
Comment		Inspec	
Rental Group	RU00019	Stand	

Click on the item **Rental Unit** in the list

Rental Package Lines			manage
TYPE	NO.	DESCI	
Rental Group	RU00018	Mini E	
Comment		Daily e	
Comment		Inspec	
Rental Group	RU00019	Stand	
Rental Group			
Rental Group			
Rental Unit			
Comment			

Click on the cell **No.**

Rental Package Lines			manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are	
Comment		Inspection checklists must be c	
Rental Group	RU00019	Standard Bucket Grp for Mini E	
Rental Unit			

Click on the lookup button in the cell **No.**

Rental Package Lines			manage
TYPE	NO.	DESCRIPTION	
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	
Rental Group	RU00019	Standard Bucket Grp for Mini Exc...	
Rental Unit			



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Click on the link in cell **No.** with the value **RU00021-001**

RU00019-003	Standard Bucket for Mini Excavator	<input type="checkbox"/>
RU00019-004	Standard Bucket for Mini Excavator	<input type="checkbox"/>
RU00019-005	Standard Bucket for Mini Excavator	<input type="checkbox"/>
RU00020-001	Breaker for Mini Excavator	<input type="checkbox"/>
RU00020-002	Breaker for Mini Excavator	<input type="checkbox"/>
RU00020-003	Breaker for Mini Excavator	<input type="checkbox"/>
RU00021-001	Vibrator Plate for Mini Excavator	<input type="checkbox"/>
RU00021-002	Select record "RU00021-001" for Mini Excavator	<input type="checkbox"/>
RU00021-003	Vibrator Plate for Mini Excavator	<input type="checkbox"/>

Click on **Lock Quantity**

With this package only 1 vibrator plate unit is provided, even when the rental quantity for the package will be greater than 1.

Therefore, the Lock Quantity field is checked to ensure that the Rental Quantity remains as 1 should the package line, Rental Quantity be greater than 1.

DESCRIPTION	QUANTITY	LOCK QUANTITY	ZERO PRICE
Excavator Group	2	<input type="checkbox"/>	<input type="checkbox"/>
equipment inspections are ...	0	<input type="checkbox"/>	<input type="checkbox"/>
ction checklists must be co...	0	<input type="checkbox"/>	<input type="checkbox"/>
ard Bucket Grp for Mini Exc...	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
or Plate for Mini Excavator	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

The following demonstrates the adding of a Standard Text Code to the package.

Click on the cell **Type**

TYPE	NO.	DESC
Rental Group	RU00018	Mini E
Comment		Daily e
Comment		Inspec
Rental Group	RU00019	Standa
Rental Unit	RU00021-001	Vibrat

Click on the item **Comment** in the list

TYPE	NO.	DESC
Rental Group	RU00018	Mini E
Comment		Daily e
Comment		Inspec
Rental Group	RU00019	Standa
Rental Unit	RU00021-001	Vibrat
Rental Group		
Rental Group		
Rental Unit		
Comment		
Comment		



Click on the cell **No.**

TYPE	NO.	DESCRIPTION
Rental Group	RU00018	Mini Excavator Group
Comment		Daily equipment inspections ar
Comment		Inspection checklists must be c
Rental Group	RU00019	Standard Bucket Grp for Mini E
Rental Unit	RU00021-001	Vibrator Plate for Mini Excavator
Comment		

Click on the lookup button in the cell **No.**

TYPE	NO.	DESCRIPTION	QU
Rental Group	RU00018	Mini Excavator Group	
Comment		Daily equipment inspections are ...	
Comment		Inspection checklists must be co...	
Rental Group	RU00019	Standard Bucket Grp for Mini Exc...	
Rental Unit	RU00021-001	Vibrator Plate for Mini Excavator	
Comment			

Click on the link in cell **Code** with the value **RENTAL RETURNS**

S Rentals, Inc.	Rentals	Search	+ New	Edit List	Delete	
ckages: All	Search	STANDARD TEXT CODES + New				
		CODE				
		MD				
		RENTAL RETURNS				
		SC	Select record "RENTAL RETURNS"			
		SUC				
		TE				

4.3.2.6. How to Setup a Price Allocation Rental Package with Metered Usage

Overview of Rental Package Metered Usage Feature:

Rental Packages include the capability to enter and bill customers for metered usage for the rental package as a whole.
The component units' metered usage is for tracking the usage for maintenance purposes only and will not be billed to the customer.

The Rental Package metered usage feature provides an option to copy the Metered Usage Qty. entered on package line to the component rental units of the package. The Metered Usage Qty. will only be copied to the units which have the same Metered Usage Unit of Measure as the rental package.

The Rental Price cards must be setup with the metered usage pricing. The setup of the metered usage pricing on the price card is mandatory in order to bill for metered usage.

The setups include configuration of the Usage tab on the Rental Package card, and the Rental Price cards with the metered usage pricing. The setup of the metered usage pricing is mandatory.

The metered usage prices can be modified on the package rental line for the pricing levels setup on the price card.



The setting up of Rental Packages for Metered Usage consists of setting up the card with the applicable options, including the Metered Usage options, adding components to the Rental Package Lines, and setting up Rental Price cards on the Rental Packages.

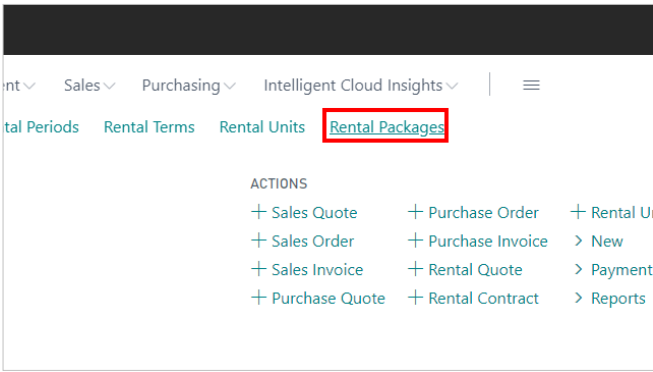
In the following example, a Rental Package will setup to include Metered Usage and the following Rental Package Lines.

- Wacker Skid Steer Group with a Quantity of 1
 - A Descriptive comment: Daily equipment inspections are mandatory.
 - A Descriptive comment: Inspection checklists must be completed and signed.
-
- Wacker Pallet Fork Group with a Quantity of 1
 - Ford 150 Trucks Group with a Quantity of 1
 - Standard Text Code, Rental Returns

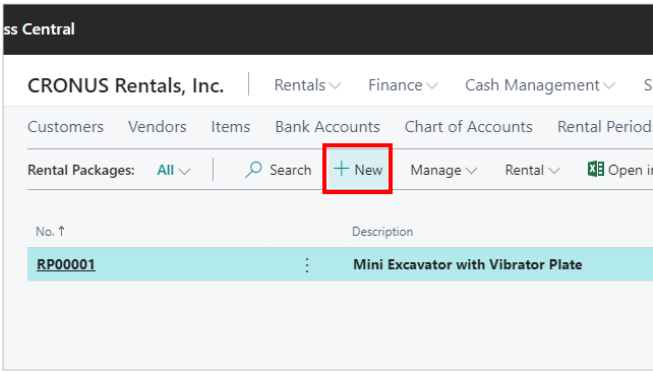
In addition, the package will not be locked, nor will the price be locked.

Business Manager Profile

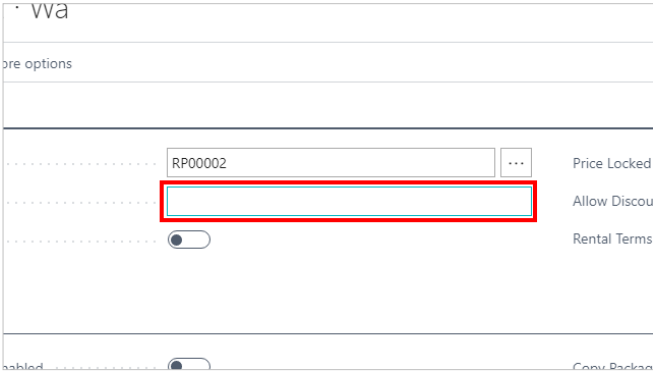
Click on the navigation menu item **Rental Packages**



Click on the navigation menu item **New**



Click on the field **Description**





ODT Rentals Online Help

Enter the text **Wacker Skid Steer Package**.

Wacker Skid Steer Package

More options

RP00002

Price Locked

W

Allow Discounts

Rental Terms

Click on the field **Rental Terms Code**

Details

Attachments

Document

Look up value

Metered Usage to Lines

Click on the link in cell **Code** with the value **WEEK-PEND**

Price Locked

Allow Discounts

Rental Terms Code

Copy Package Metered Usage to Lines

WEEK-END-OPT-TL... Weekly Rental for Optimized

WEEK-PEND Weekly Rental - Per. Billing

WEEK-PEND-OPT Weekly Rental - Per. Optimized

WEEK-PSTART Weekly Rental - Per. Billing

WEEK-START Weekly Rental for Billing at

+ New

Click on the toggle field **Metered Usage Enabled**

Description

Package Locked

Usage

Metered Usage Enabled

Metered Usage Base UOM Code

Posting



ODT Rentals Online Help

Click on the field **Metered Usage Base UOM Code**

The screenshot shows a form with several sections. The 'Metered Usage Base UOM Code' field is highlighted with a red box. The form includes a 'Rental Terms' section with a toggle switch, a 'Copy Package' section with a toggle switch, and a 'Metered Usage Base UOM Code' dropdown menu. The dropdown menu is currently empty, and the 'HOUR' option is highlighted in the list.

Click on the link in cell **Code** with the value **HOUR**

The screenshot shows the 'Metered Usage Base UOM Code' dropdown menu open, displaying a list of options: BOX, CAN, DAY, HOUR, and KG. The 'HOUR' option is highlighted with a red box. The form also includes a 'Posting >' section and a 'Rental Package Lines' table.

Click on the toggle field **Copy Package Metered Usage to Lines**

The screenshot shows the 'Copy Package Metered Usage to Lines' toggle switch, which is currently turned off. The form also includes an 'Allow Discounts' toggle switch and a 'Rental Terms Code' dropdown menu.

Click on the cell **Type** with the value **Rental Group**
Rental Unit Comment

Select Rental Group.

The screenshot shows the 'Rental Package Lines' table with the 'Type' column highlighted. The 'Rental Group' option is selected in the dropdown menu. The table also includes columns for 'No.' and 'Description'.



Click on the cell **No.**

Posting >

Rental Package Lines | Manage

Type	No.	Description
→ Rental Group		
Rental Group		
Rental Unit		
Comment		

Look up value

Click on the lookup button in the cell **No.**

e Lines | Manage

Group	No.	Description

Click on the link in cell **No.** with the value **RU00022**

Wacker Skid Steer

RU00011 Power Shovel Group

RU00012 Cut-Off Gasoline Saw Group

RU00018 Mini Excavator Group

RU00019 Standard Bucket Grp for

RU00020 Breaker Group for Mini

RU00021 Vibrator Plate Group for

RU00022 Wacker Skid Steer Group

RU00023 Ford 150 Trucks Group

RU00024 Wacker 50Z3 Excavator

RU00025 Wacker Hammer Drill G

RU00028 Wacker Skid - Pallet For

RU00029 Wacker Skid Steer - Utili

Click on the button **Yes**

? Rental Unit RU00022 is setup for Metered Usage Enabled, therefore metered usage transactions will be recorded as adjustments. Billing of metered usage is not allowed on rental package components. Do you want to include the unit in the package?

Yes No

Quantity	Lock Quantity	Zero Price	Do No
1	<input type="checkbox"/>	<input type="checkbox"/>	



Enter the text **Inspection cheklists must be completed and signed.**

Description		
00022	Wacker Skid Steer Group	
	Daily equipment inspections are mandatory..	
	1	

Click on the cell **Type**

Select Rental Group.

Rental Package Lines			Manage
Type	No.	Description	
Rental Group	RU00022	Wacker Skid Ste	
Comment		Daily equipmer	
→ Comment		Inspection chek	

Click on the cell **No.**

Rental Package Lines			Manage
Type	No.	Description	
Rental Group	RU00022	Wacker Skid Steer Gro	
Comment		Daily equipment inspe	
Comment		Inspection cheklists m	
→ Rental Group			

Click on the lookup button in the cell **No.**

e Lines			Manage
	No.	Description	
Group	RU00022	Wacker Skid Steer Group	
ent		Daily equipment inspections are mandatory..	
ent		Inspection cheklists must be completed and sig	
Group			



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00028**

No.	Description
RU00020	Breaker Group for Mini
RU00021	Vibrator Plate Group for
RU00022	Wacker Skid Steer Group
RU00023	Ford 150 Trucks Group
RU00024	Wacker 5023 Excavator
RU00025	Wacker Hammer Drill G
RU00028	Wacker Skid - Pallet For
RU00029	Wacker Skid Steer - Utili

Click on the cell **Quantity** with the value **1**

The Quantity field is automatically populated with 1, which for this example is the correct quantity.

Quantity	Lock	Zero
1	<input type="checkbox"/>	
0	<input type="checkbox"/>	
0	<input type="checkbox"/>	
1	<input type="checkbox"/>	

Click on the cell **Type**

Select Rental Group.

Type	No.	Description
Rental Group	RU00022	Wacker Skid Steer Gro
Comment		Daily equipment inspe
Comment		Inspection chek
→ Rental Group	RU00028	Wacker Skid - P

Click on the cell **No.**

Type	No.	Description
Rental Group	RU00022	Wacker Skid Steer Gro
Comment		Daily equipment inspe
Comment		Inspection cheklists m
→ Rental Group	RU00028	Wacker Skid - Pallet Fo



ODT Rentals Online Help

Click on the lookup button in the cell **No.**

Manage		
	No.	Description
Group	RU00022	Wacker Skid Steer Group
ent		Daily equipment inspections are mandatory..
ent		Inspection checklists must be completed and signed.
Group	RU00028	Wacker Skid - Pallet Fork Group
Group		

Click on the link in cell **No.** with the value **RU00023**

RU00012	Cut-Off Gasoline Saw Group
RU00018	Mini Excavator Group
RU00019	Standard Bucket Grp for
RU00020	Breaker Group for Mini
RU00021	Vibrator Plate Group for
RU00022	Wacker Skid Steer Group
RU00023	Ford 150 Trucks Group
RU00024	Wacker 5023 Excavator
RU00025	Wacker Hammer Drill G
RU00028	Wacker Skid - Pallet For
RU00029	Wacker Skid Steer - Utili

Click on the button **Yes**

? Rental Unit RU00023 is setup for Metered Usage Enabled, therefore metered usage transactions will be recorded as adjustments. Billing of metered usage is not allowed on rental package components. Do you want to include the unit in the package?

Yes **No**

	Quantity	Lock Quantity	Zero Price	Do No
p	1	<input type="checkbox"/>	<input type="checkbox"/>	
tions are mandatory..	0	<input type="checkbox"/>	<input type="checkbox"/>	
ation must be completed and signed.	0	<input type="checkbox"/>	<input type="checkbox"/>	

Click on the cell **Quantity** with the value **1**

The Quantity field is automatically populated with 1, which for this example is the correct quantity.

	Quantity	Lock Quantity	Zero
on			
Skid Steer Group	1	<input type="checkbox"/>	
quipment inspections are mandatory..	0	<input type="checkbox"/>	
on checklists must be completed and signed.	0	<input type="checkbox"/>	
Skid - Pallet Fork Group	1	<input type="checkbox"/>	
0 Trucks Group	1	<input type="checkbox"/>	

4.3.2.7. Price Allocation Rental Package Price Card Fields

Rental Price cards are mandatory for all rental terms that are to be used with a Price Allocation package.



General			
No.	RP00001	Price	0.00
Rental Terms Code		Optimize	Never
Sales Type	All Customers	Prorate	Never
Sales Code		Allow Line Disc.	<input checked="" type="checkbox"/>
Currency Code		Tax Group Code	
Starting Date		Rental Terms Code Alt1 ..	
Ending Date		Rental Terms Code Alt2 ..	

Metered Usage	
Metered Usage Billing ...	<input type="checkbox"/>
Metered Usage UOM ...	
Metered Usage Perio...	
Metered Usage Levels ...	Unlimited
Metered Usage Base ...	0.00
Metered Usage Level ...	0.00
Metered Usage Level ...	0.00
Metered Usage Level ...	0.00
Metered Usage Allow ...	<input type="checkbox"/>
Metered Usage Tax Gr...	

For each price cards setup for rental terms on the package, then all Rental Unit Group and Rental Unit components setup in the Rental Package Lines, must have price cards setup for the same rental term with their applicable prices.

These are prices are used in the allocation of rental revenue for the Rental Package price to the rental components specified in the Rental Package Lines.

The Rental Price setup on Rental Packages does not include Damage Waiver charges.

Should Damage Waiver charges be required, then the Rental Unit Groups or Rental Units in the Rental Package Lines must have the Damage Waiver prices setup on their Rental Price cards.

Damage Waiver charges are charges in addition to the Rental Price setup on the package.

Mandatory Fields:

Rental Term Code

Select the Rental Terms Code that applies to the price being setup for the package.

Price

Enter the price that applies to the rental term selected. This is the price the customer will be billed, based on the term selected.

When the term selected has an Invoicing Type of End or Start the price for the rental charges will apply to the full rental unless the contract is extended. When the term selected has an Invoicing Type or Periodic End or Periodic Start, then the customer will be billed this price for the rental charge each rental period.

Tax Group Code



ODT Rentals Online Help

The Tax Group Code selected specifies the tax group that is used to calculate the sales tax on rental quotes and contracts for the rental term selected, when invoicing the rental contract.

The Tax Group Code on the price card will default to the rental quote/contract rental lines and takes priority over the Tax Group Code on the rental package card. This can be overridden on the package rental line when the field, Package Locked, is not set to yes, on the package card.

For Rental Package component lines, the Tax Group specified on the Rental Price card of the package will be applied to all component rental lines and cannot be edited on these lines.

Optional Fields:

Rentals provides the ability to specify pricing, which is valid between a Starting Date and an Ending Date. This setup can be used for all prices for tracking pricing, and enables the setting up when prices are to increase, in advance or can be used for promotion sales pricing.

Starting Date

The date entered in this field specifies the date on which the pricing becomes effective.

Ending Date

The date entered in this field specifies the date on which the pricing ends.

Currency Code

Separate price cards can be setup for other currencies, should the organization not want the system to automatically calculate the price for a foreign currency customer using the exchange rates setup in Dynamics 365 Business Central.

If it is preferred that separate price cards are to be used, then select the currency that the price is being setup for.

NOTE:

When foreign currency price cards are setup, the system uses the price card price, which is a static price. It does not adjust when exchange rates are changed.

Allow Line Disc.

By default, this field is set to allow line discounts. Should line discounts not be allowed for the selected rental term, then disable the field.

When a Rental Package card, has the Allow Discounts disabled, then the Allow Line Disc. setting on the price card is not applied.

When on the package card, the Allow Discount is enabled, then the Allow Line Disc. setting on the price card will apply to the Rental Package line and all component lines.

Informational fields:

Optimize

Displays the Optimize setting as setup on the rental term selected and cannot be edited.

Prorate

Displays the Prorate setting as setup on the rental term selected and cannot be edited.

Rental Terms Code Alt1:

Displays the Alt1 code is setup on the rental term selected and cannot be edited. This term will default to the rental line on which the package is selected. When the rental term has Optimize set to All Periods, then the rental price for this term will default to the rental line, ALT1 Rental Unit Price field and will be used in the billing calculations.

Rental Terms Code Alt2:

Displays the Alt2 code is setup on the rental term selected and cannot be edited. This term will default to the rental line on which the package is selected. When the rental term has Optimize set to All Periods, then the



rental price for this term will default to the rental line, ALT2 Rental Unit Price field and will be used in the billing calculations.

Metered Usage Tab:

The following provides an overview of the metered usage related fields on the rental price card. The fields can only be edited if the Rental Package card has the Metered Usage Enabled field activated and the Metered Usage Base IOM code field populated.

Metered Usage Billing:

A toggle field, which must be enabled, to indicate that Meter Usage entry on the package rental line is required. Metered Usage pricing cannot be setup on the Rental Price card, unless this field is enabled.

Metered Usage UOM Code:

The UOM (Unit of Measure) Code defaults from the setup on the rental package card. This field is mandatory.

Metered Usage Period Code:

Specifies the Period Code that will be applied to the Metered Usage. Normally this set to the same Period Code that is on the Rental Term card selected on the General tab.

Metered Usage Levels:

Specified the number of metered Usage Levels including Unlimited (1 level), 2 levels. 3 levels.

The following price and allowance quantity fields will be able to be configured depending on the option selected in the Metered Usage Levels field.

For example, if 2 Levels is selected, then only the Metered Usage Base Price, Metered Usage Level 1 End Qty. and Metered Usage Level 2 Unit Price will be able to be configured.

Metered Usage Base Price:

Specifies the price that will be billed for quantities from 0 to the Metered Usage Level 1 End Qty. This price can be set to 0.00, when there is a set allowance for the rental where billing for Metered Usage only occurs, if greater than the allowance.

Metered Usage Level 1 End Qty.:

Specifies the quantity at which the first level allowance ends.

Metered Usage Level 2 Unit Price:

Specifies the price per UOM that will be billed to the customer for usage that falls within the second level range.

Metered Usage Level 2 End Qty.:

Specifies the quantity at which the second level allowance ends.

Metered Usage Level 3 Unit Price:

Specifies the price per UOM that will be billed to the customer for usage that exceeds the Metered Usage Level 2 End Qty.

Metered Usage Allow Line Disc.:

Specifies whether Line Discounts are to be allowed for Metered Usage or not.

Metered Usage Tax Group Code:

Specifies the Tax Group Code that should be applied to Metered Usage charges. This field is mandatory.

4.3.2.8. How to Add Rental Prices to Price Allocation Rental Packages

Business Manager Profile

Two examples of setting up a Rental Price card on a Rental Package are provided.



The first example demonstrates setting up a price card that only contains a rental price for the selected term on the price card.

The second example demonstrates setting up a price card that contains both a rental price and metered usage pricing for the selected term on the price card.

IMPORTANT

If an organization will be setting up Rental Price cards on a package for terms with Optimize enabled, then the optimized Rental Price cards on the components need to be the same proportions as the price cards on the package.

If the proportions are not the same, then when the package rental price is allocated to the components, the optimization of the component lines will be calculated differently than the package line. Thus, potentially resulting in a large rounding amount for the difference.

The following demonstrates the setup of a Rental Price card with only a rental price on a Rental Package. This example does not include Metered Usage pricing setup.

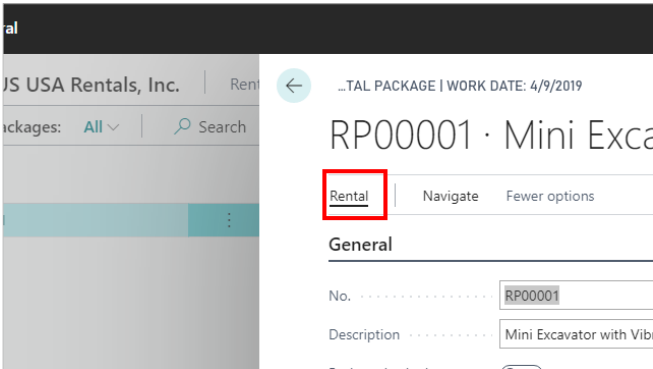
In this example, a Price Card for an end rental term (MONTH-END - PRORATE) will be setup with a price of 2,125.97, to demonstrate the rounding.

NOTE:

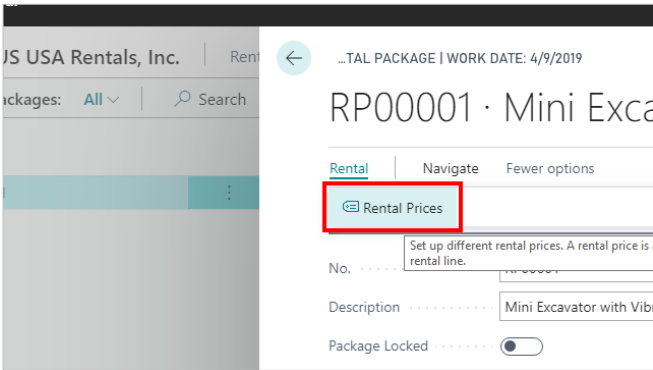
Price cards were setup for the same rental term, MONTH-END-PRORATE, on the Rental Unit Groups as follows:

- Mini Excavator with a price of 900.00
- Standard Bucket with a price of 180.00
- Vibrator Plate with a price of 450.00

Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Prices**





Click on the field **Rental Term Filter**

ce List

Edit List Delete Edit View Open in Excel

...

Cur

Click on the navigation menu item **New**

Dynamics 365 Business Central

RP00001 - MINI EXCAVATOR WITH VIBRATOR PLATE | WORK DATE: 4/9/20

Rental Price List

Search + New Edit List Delete Edit V

General Create a new entry.

Rental Term Filter

Sales Type Filter

Click on the field **Rental Terms Code**

Rental RP00001

Search

General

No. RP00001 Price

Rental Terms Code

Sales Type All Customers Prorate

Sales Code Allow Line

Currency Code Tax Group

Starting Date Rental Ter

Click on the link in cell **Code** with the value **MONTH-END-PRORATE**

No. RP00001 Price

Rental Terms Code

Sales Type

Sales Code

Currency Code

Starting Date

Ending Date

CODE	DESCRIPTION
MONTH-END-OPT	Monthly Rental for Optimiz
MONTH-END-OPT...	Monthly Rental for Optimiz
MONTH-END-PROR...	Monthly Rental for Prorated
MOI	Select record "MONTH-END-PRORATE" | Per. Billing
MONTH-PEND EARLY	Monthly Rental - Early Per. B

+ New



Click on the field **Price**

+

✓ **SAVED**

H-END-PRORATE

PRICE

0.00

PRORATE

Optimize

Never

Prorate

All Periods

Allow Line Disc.

Tax Group Code

Enter the text **2125.97**.

+

✓ **SAVED**

H-END-PRORATE

PRICE

0.00

PRORATE

Optimize

Never

Prorate

All Periods

Allow Line Disc.

Tax Group Code

Click on the field **Tax Group Code**

Select the applicable Tax Group Code that is to be applied to the rental charges that use this price card.

PRICE

2125.97

PRORATE

Optimize

Never

Prorate

All Periods

Allow Line Disc.

Tax Group Code

Rental Terms Code Alt1

Rental Terms Code Alt2

Click on the link in cell **Code** with the value **SUPPLIES**

Rental Terms Code Alt1

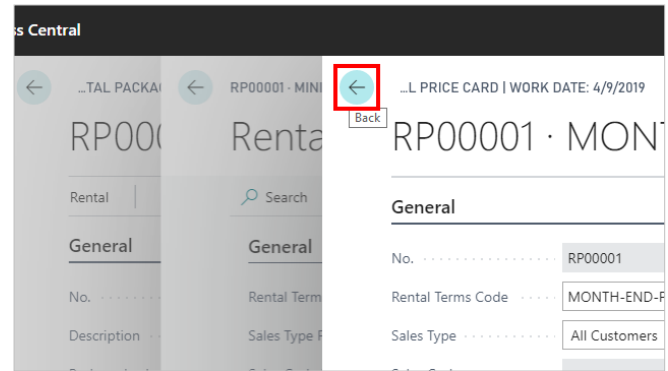
Rental Terms Code Alt2

CODE	DESCRIPTION
FURNITURE	Taxable Olympic Furniture
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supplies

+ New

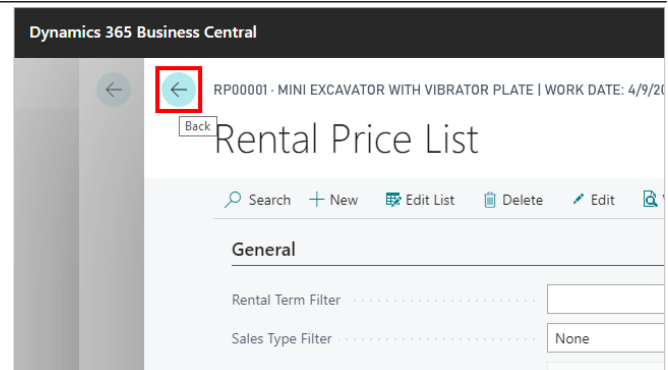
Select record "SUPPLIES"

Click on the back button



The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with a back arrow icon highlighted by a red box. Below the navigation bar, the main content area displays 'RP00001 · MON' and 'General' tab. The 'General' tab shows fields for 'No.' (RP00001), 'Rental Terms Code' (MONTH-END-F), and 'Sales Type' (All Customers).

Click on the back button



The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with a back arrow icon highlighted by a red box. Below the navigation bar, the main content area displays 'RP00001 · MINI EXCAVATOR WITH VIBRATOR PLATE | WORK DATE: 4/9/20' and 'Rental Price List'. The 'Rental Price List' section has a search bar and buttons for '+ New', 'Edit List', 'Delete', and 'Edit'.

The Rental Package is now ready for renting.

To learn about processing contracts with Rental Packages, see the ODT Rental Online Help, Additional Processes, Rental Packages, How to Process Contracts with Rental Packages.

The following demonstrates setting up a rental price card, including metered usage pricing on the Rental Package configured for metered usage.

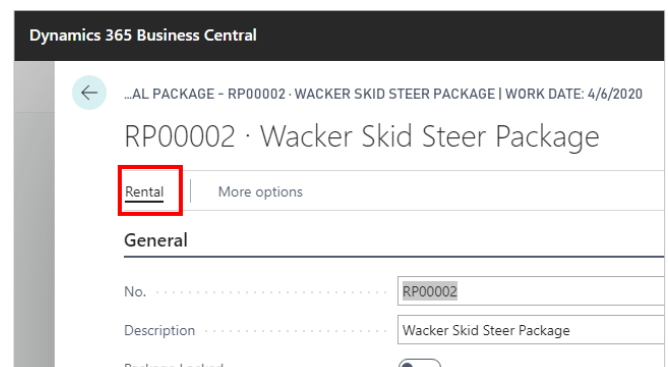
NOTE:

Price cards were setup for the same rental term, WEEK-PEND, (for recurring invoicing at the end of each week), on the Rental Unit Groups configured on the package.

The weekly pricing on each group are as follows:

- Wacker Skid Steer with a rental price of 2000.00, plus enabled for metered usage with a Usage UOM of HOUR, with prices and allowances for 2 Levels. The metered usage will be recorded for maintenance tracking purposes only, as the group and unit are a package component.
- Wacker Pallet Fork with a rental price of 300.00
- Ford 150 Truck with a rental price of 500.00, plus enabled for metered usage with a Usage UOM of MILES, with prices and allowances for 2 Levels. The metered usage will be recorded maintenance tracking purposes only, as the group and unit are a package component.

Click on the navigation menu item popup **Rental**



The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a navigation bar with a back arrow icon. Below the navigation bar, the main content area displays 'RP00002 · Wacker Skid Steer Package'. The 'Rental' button is highlighted with a red box. Below the 'Rental' button, there's a 'More options' link. The 'General' tab shows fields for 'No.' (RP00002), 'Description' (Wacker Skid Steer Package), and 'Package Locked' (toggle switch).



Click on the navigation menu item **Rental Prices**

Dynamics 365 Business Central

← ...AL PACKAGE - RP00002 · WACKER SKID STEER PACKAGE | WORK DATE: 4/6/2020

RP00002 · Wacker Skid Steer Package

Rental | More options

Rental Prices Rental Sales Kit Metered Usage Entries

No. RP00002

Description Wacker Skid Steer Package

Package Locked ☐

Click on the navigation menu item **New**

Dynamics 365 Business Central

← RP00002 · WACKER SKID STEER PACKAGE | WORK DATE: 4/6/2020

View - Rental Price List - RP00002 · Wacker

Search **+ New** Edit List Delete Edit View Op

General

Rental Term Filter

Sales Type Filter

Sales Code Filter

Click on the field **Rental Terms Code**

View - RP00002

Search

General

No. RP00002 Price

Rental Terms Code Optimize

Sales Type All Customers Look up value

Sales Code Allow Line

Currency Code Tax Group

Starting Date Rental Ter

Click on the link in cell **Code** with the value **WEEK-PEND**

General

No. RP00002 Price

Rental Terms Code Optimize

Sales Type

Sales Code

Currency Code

Starting Date

Ending Date

Code	Description
WEEK-END-OPT-TL...	Weekly Rental for Optimized
WEEK-PEND	Weekly Rental - Per. Billing i
WEEK-PEND-OPT	Weekly Rental - Per. Optimiz
WEEK-PSTART	Weekly Rental - Per. Billing i
WEEK-START	Weekly Rental for Billing at

+ New

Metered Usage



Click on the field **Price**

The screenshot shows a form titled '-PEND' with a 'NOT SAVED' status. The 'Price' field is highlighted with a red box and contains the value '0.00'. Other fields include 'Optimize' (Never), 'Prorate' (Never), 'Allow Line Disc.' (toggle on), and 'Tax Group Code' (dropdown).

Enter the text **2500.00**.

The screenshot shows the same form as before, but the 'Price' field now contains the value '2500.00' and is highlighted with a red box. The status has changed to 'SAVED'.

Click on the field **Tax Group Code**

The screenshot shows the form with the 'Price' field now containing '2500.00'. The 'Tax Group Code' field is highlighted with a red box and is currently empty. A 'Look up value' button is visible next to it.

Click on the link in cell **Code** with the value **SUPPLIES**

The screenshot shows the 'Tax Group Code' dropdown menu open. The 'SUPPLIES' option is highlighted with a red box. The menu lists several options: FURNITURE (Taxable Olympic Furniture), LABOR (Labor on Job), MATERIALS (Taxable Raw Materials), NONTAXABLE (Nontaxable), and SUPPLIES (Taxable Olympic Supplies). There is also a '+ New' option.



Click on the toggle field Metered Usage Billing

Rental Term ...
→ WEEK-PE

Starting Date Rental Ter
Ending Date Rental Ter

Metered Usage

Metered Usage Billing ... ☒ Metered U
Metered Usage UOM ... Metered U
Metered Usage Perio... Metered U
Metered Usage Levels ... Unlimited Metered U
Metered Usage Base ... 0.00 Metered U

Click on the field **Metered Usage Period Code**

→ WEEK-PE

Metered Usage

Metered Usage Billing ... ☒ Metered U
Metered Usage UOM ... HOUR Metered U
Metered Usage Perio... Metered U
Metered Usage Levels ... Unlimited Metered U
Metered Usage Base ... 0.00 Metered U
Metered Usage Level ... 0.00

Click on the link in cell **Code** with the value **WEEK**

Metered Usage Levels ...
Metered Usage Base ...
Metered Usage Level ...

Code ↑	Description
4HR	4 Hours
8HR	8 Hours
DAY	Daily Rental
MONTH	Monthly Rental
WEEK	Weekly Rental
+ New	

Click on the field **Metered Usage Levels**

Metered Usage

Metered Usage Billing ... ☒ Metered U
Metered Usage UOM ... HOUR Metered U
Metered Usage Perio... WEEK Metered U
Metered Usage Levels ... Unlimited Metered U
Metered Usage Base ... 0.00 Metered U
Metered Usage Level ... 0.00



Click on the item **2 Levels** in the list

Metered Usage

Metered Usage Billing ☒

Metered Usage UOM

HOURLY

Metered Usage Perio...

WEEK

Metered Usage Levels

Unlimited

Unlimited

2 Levels

3 Levels

Metered Usage Base ...

Metered Usage Level ... 0.00

Click on the field **Metered Usage Base Price**

Metered Usage

Metered Usage Billing ☒

Metered Usage UOM

HOURLY

Metered Usage Perio...

WEEK

Metered Usage Levels

2 Levels

Metered Usage Base ... 0.00

Metered Usage Level ... 0.00

Enter the text **40.00**.

Metered Usage

Metered Usage Billing ☒

Metered Usage UOM

HOURLY

Metered Usage Perio...

WEEK

Metered Usage Levels

2 Levels

Metered Usage Base ... 0.00

Metered Usage Level ... 0.00

Click on the field **Metered Usage Level 1 End Qty.**

Metered Usage

Metered Usage Billing ☒

Metered Usage UOM

HOURLY

Metered Usage Perio...

WEEK

Metered Usage Levels

2 Levels

Metered Usage Base ... 40.00

Metered Usage Level ... 0.00



Enter the text **40**.

Click on the field **Metered Usage Level 2 Unit Price**

Enter the text **80.00**.

Click on the back button

The Rental Package is now ready for renting.

To learn about processing contracts with Rental Packages that have Metered Usage pricing, see the ODT Rental Online Help, Additional Processes, Rental Packages, How to Process Contracts for Rental Packages with Metered Usage Pricing.

4.3.2.9. How to Setup a Roll-up Pricing Rental Package

The following example demonstrates the setup of a Rental Package with Roll-up Pricing and package lines.

NOTE:



ODT Rentals Online Help

To setup a Roll-up package as a template package, where the groups and units are inserted on the rental lines, then the only Rental Package line required is a line with Type of Comment and a short comment typed in the Description field.

Click on the navigation menu item **Rental Packages**

Click on the link **New**

Click on the field **Description**

Enter the text **Mini Excavator with Standard Bucket.**



ODT Rentals Online Help

Click on the toggle field Use Roll-up Pricing

...

Allow Discounts

☒

Use Roll-up Pricing

☐

Rental Terms Code

Click on **Package Locked**

Note that the Package Locked field can no longer be enabled as Roll-up Packages cannot be locked.

Rental

Related

Fewer options

General

No.

RP00003

Description

Mini Excavator with Standard

Package Locked

☐

Price Locked

☐

Usage

Metered Usage Enabled

☐

Click on **Price Locked**

Note that the Price Locked field can no longer be enabled as Roll-up Packages do not have Rental Price cards setup.

General

No.

RP00003

Description

Mini Excavator with Standard

Package Locked

☐

Price Locked

☐

Usage

Metered Usage Enabled

☐

Metered Usage Base UOM Code

Click on the field **Gen. Prod. Posting Group**

☐

e

*

Manage

No.

Description



Click on the link in cell **Code** with the value **RETAIL**

Posting Group *

Code ↑	Description
→ NO TAX	Miscellaneous without tax
RETAIL	Retail
SERVICES	Resources, etc.
+ New	

Click on the field **Tax Group Code**

to Lines ☐

..... *

Quantity Lock Quantity Zero Price Do Not Print

Click on the link in cell **Code** with the value **SUPPLIES**

Code ↑	Description
→ FURNITURE	Taxable Olympic Furniture
LABOR	Labor on Job
MATERIALS	Taxable Raw Materials
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Supplies
+ New	

Click on the cell **Type** with the value **Rental Group**

Gen. Prod. Posting Group RETAIL

Rental Package Lines | Manage

Type	No.
→ Rental Group	

ODT Rentals Online Help

Click on the cell **No.**

en. Prod. Posting Group RETAIL

Rental Package Lines | Manage

Type	No.	Description
→ Rental Group		
Rental Group		
Rental Unit		
Comment		

Click on the lookup button in the cell **No.**

[illegible]

Click on the link in cell **No.** with the value **RU00018**

→ RU00001	Buckeye Ditcher
RU00008	18 G Brad Nailer
RU00009	16 G Brad Nailer
RU00010	Framing Air Nail
RU00011	Power Shovel Gr
RU00012	Cut-Off Gasoline
RU00018	Mini Excavator G
RU00019	Standard Bucket
RU00020	Breaker Group fo
RU00021	Vibrator Plate Gr
RU00022	Wacker Skid Stee
RU00023	Ford 150 Trucks

Click on the cell **Quantity** with the value **1**

[illegible]



ODT Rentals Online Help

Enter the text **2**.

▼	Tax Group Code	SUPPLIES
	Quantity	Lock Quantit
	<input type="text"/>	<input type="checkbox"/>

Click on the cell **Type** with the value Rental Group

Rental Package Lines		Manage
Type	No.	
→ Rental Group	RU00018	
<input type="text"/>		

Click on the cell **No.**

Rental Package Lines		Manage
Type	No.	Description
Rental Group	RU00018	Mini Excavator
→ Rental Group ▼	<input type="text"/>	

Click on the lookup button in the cell **No.**

Manage	
No.	Description
RU00018	Mini Excavator Group
<input type="text"/>	<input type="text"/>

Click on the link in cell **No.** with the value **RU00019**

RU00001	Buckeye Shovel
RU00008	18 G Brad Nailer
RU00009	16 G Brad Nailer
RU00010	Framing Air Nail
RU00011	Power Shovel Gr
RU00012	Cut-Off Gasoline
RU00018	Mini Excavator G
RU00019	Standard Bucket
RU00020	Breaker Group fo
RU00021	Vibrator Plate Gr
RU00022	Wacker Skid Stee
RU00023	Ford 150 Trucks
RU00024	Wacker 50Z3 Exc

Click on the cell **Quantity** with the value 1

[illegible]

Enter the text **2**.

	Quantity	Lock Quantit
mini Excavator	2	<input type="checkbox"/>
		<input type="checkbox"/>

As the package has the Use Roll-up Pricing enabled, the Rental menu option of Rental Prices will not be available.

Click on the back button

The screenshot displays the Microsoft Dynamics CRM interface. On the left, the 'Rental Packages' list is visible, showing three items: RP000001, RP000002, and RP000003. The 'Rental Package' detail view is open on the right, showing the selected package 'RP000003 · Mini Excavator'. A red box highlights the back arrow icon in the top left of the detail view, and a blue box highlights the 'RP000003' value in the 'No.' field.

Click on the cell **Use Roll-up Pricing** with the value **on**

Note that on the Rental Packages list that the field, Use Roll-up Pricing is checked, thus identifying the package is based on Roll-up Pricing.

checked	Price Locked	Allow Discounts	Use Roll-up Pricing	Rental Terms Code
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	MONTH-PEND
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WEEK-PEND
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

The following picture displays the setup for a Roll-up Package template, which provides the ability to insert rental units into the package.

←

Rental Package

✎

🔗

+

🗑️

✓ Saved

🔗

RP00004 · Roll-up Package Template

Rental

Related

Fewer options

General

No. RP00004 ...

Allow Discounts ☒

Description Roll-up Package Template

Use Roll-up Pricing ☒

Package Locked ☐

Rental Terms Code

▼

Price Locked ☐

Usage >

Posting

Gen. Prod. Posting Gr... SERVICES ▼

Tax Group Code SUPPLIES ▼

Rental Package Lines | Manage

Type	No.	Description	Quantity	Lock Qua...	Zero Price	Do Not Print
→ Comment		Roll-up Template	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.3.3. Processing Price Allocation Packages

4.3.3.1. How to Process Contracts with Rental Price Allocation Packages

4.3.3.1.1. Overview

The Package Price Excl. Tax field will need to be added to the Rental Lines using the Personalize feature.

The rental contract will be for a one month plus 9 days which will use proration to determine the prices.

The rental package price setup for the MONTH-END-PRORATE rental term has a price of 2,125.97 for one month. As the contract is for one month plus 9 days the proration calculation is used to determine the 9 day price as 1,371.59. Thus the full contract price is 3,497.56.

The sum of the group prices and the individual unit, for a single rental period, is 2,250.00 plus 1,451.61 for the 9 days which totals 3,701.61.

During the revenue allocation of the Rental Package to the component units, the factor is calculated as follows: Rental Package price, 2,125.97 divided by 2,250.00 which equals 0.944876.

Then the factor is applied to the rental unit price for the component units during revenue allocation. Each unit price will be multiplied by the factor and revise the Rental Unit Price on the line, so that the sum of the units will equal the Rental Package, Rental Unit Price.

A rounding amount of 0.01 occurs for the partial period, and will be posted to the G/L Account specified in the Rental Package Rounding Ac. No. field, on the Customer Posting Groups.

The calculated rounding amount prints in the Sales Charges section on the Proforma Invoice and the Posted Rental Invoice.

Rounding amounts may or may not occur depending on the rental term and whether the length of the rental contract has a partial period in it.

NOTE:

When a package contains groups or units that have the Metered Usage Enabled field enabled, then the entry of either a Current Meter Reading or Metered Usage Qty. is required. This is to ensure that the tracking for maintenance purposes is supported in rental packages.

To learn about processing Metered Usage for maintenance tracking purposes only, see ODT Rental Online Help, Additional Rental Processes, Metered Usage.

When a package contains groups or units that have the Periodic Usage Enabled field enabled, the Rental Periodic Usage Calendar is not available to record the days in use and days on standby.

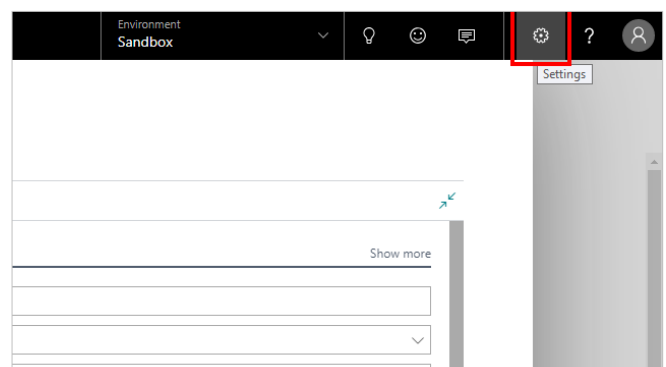
4.3.3.1.2. How to Add the Package Price Excl. Tax field to Rental Lines

Sales Order Processor Profile

The same steps apply to a user having the Business Manager Profile.

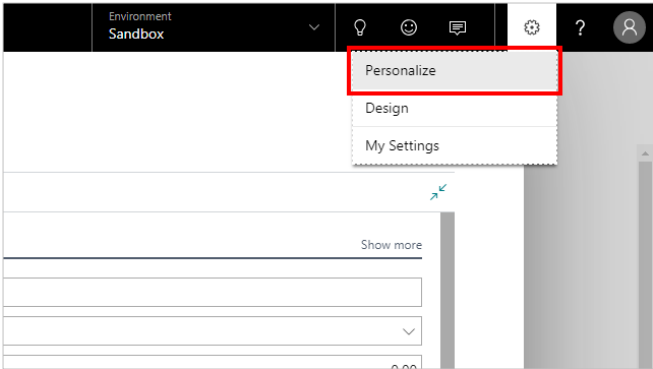
The following demonstrates adding the Package Price Excl. Tax field to the Rental Lines on an open Rental Contract.

Click on the navigation menu item popup **Settings**



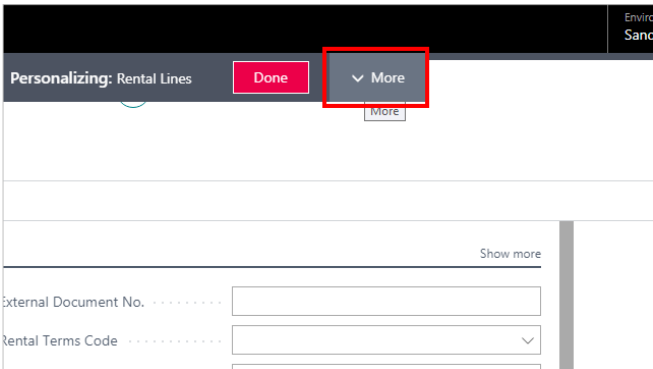


Click on the button **Personalize**

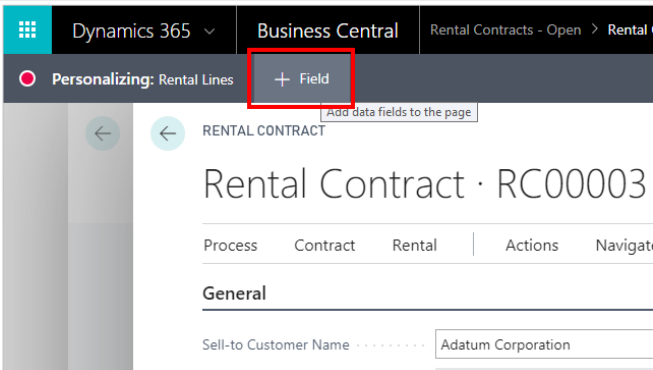


Click on the Rental Lines section to select the part of the document that the fields will be added to.

Click on the link **More**



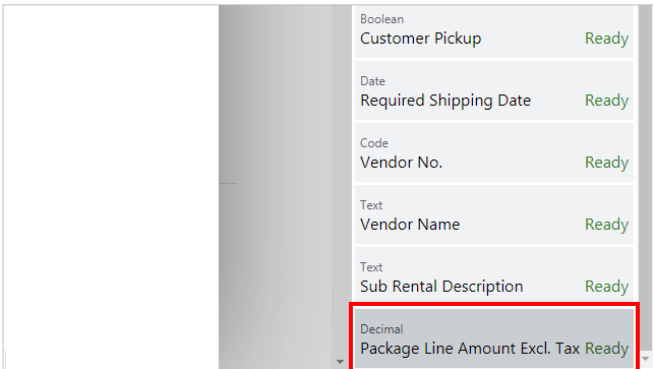
Click on the link **Field**



Click and hold the left mouse button on the data brick
Caption = Package Line Amount Excl. Tax

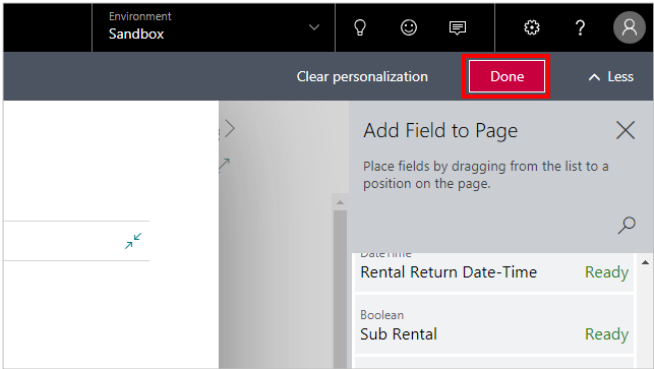
Drag and Drop the field to where you would like it
located on the Rental Lines.

Suggestion is that this field be placed in front of the
Rental Unit Price field and resize the field, so that it
takes up less space.





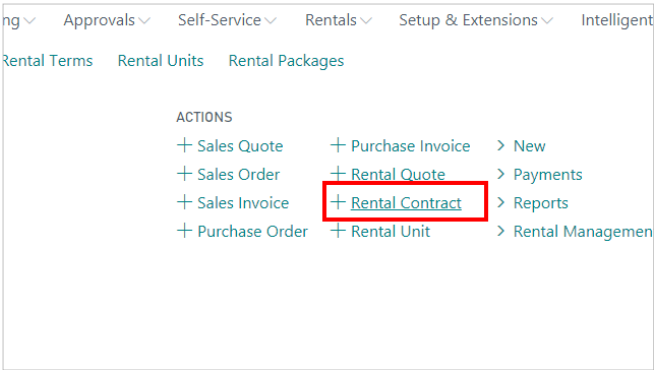
Click on the link **Done**



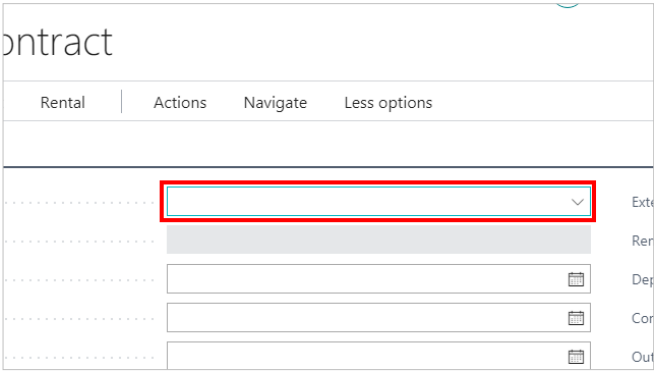
4.3.3.1.3. How to Process a Contract with a Rental Package

The following demonstrates the creation of a contract, the entry of a Rental Package that contains only a rental price on the price card, and the processing of the rental contract.

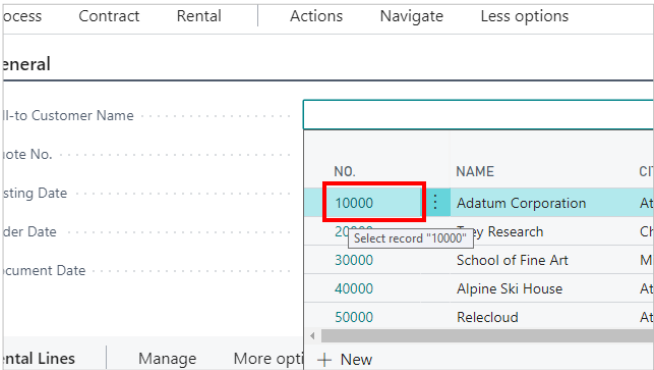
Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**



Click on **No. = 10000**, **Name = Adatum Corporation**,
City = Atlanta





ODT Rentals Online Help

Click on the cell **Rental Unit No.**

The screenshot shows a table with columns: RENTAL UNIT NO., STANDARD TEXT CODE, and DESCRIPTION. The first row has a red box around the RENTAL UNIT NO. cell, which contains a lookup icon (three dots). Below the table are tabs for 'Rental Lines', 'Manage', and 'More options'.

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows the same table as before, but the lookup button (three dots) in the RENTAL UNIT NO. cell is highlighted with a red box.

Click on the link in cell **No.** with the value **RP00001**

Select the applicable Rental Package.

The screenshot shows a dropdown menu titled 'RENTAL UNIT LIST + New'. It lists several options with columns: NO., DESCRIPTION, and GROUP. The option 'RP00001' is highlighted with a red box. Below the list are tabs for 'Search', '+ New', 'Edit List', 'Delete', and 'Manage'.

Click on the cell **Rental Terms Code**

As the example is for MONTH-END-PRORATE the Rental Terms Code must be changed.

The screenshot shows a table with columns: STANDARD TEXT CODE, DESCRIPTION, RENTAL TERMS CODE, RENTAL QUANTITY, and LOCATION CODE. The first row has a red box around the RENTAL TERMS CODE cell, which contains the value 'MONTH-PEND'. Below the table are tabs for 'Manage' and 'More options'.



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Terms Code**

STANDARD CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Mini Excavator with Vibrat...	MONTH-PR	0		
<div>Look up value</div>					

Click on **Code = MONTH-END-PRORATE**,
Description = Monthly Rental for Prorated End Billing

STANDARD CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Mini Excavator with Vibrat...	MONTH-PR	0		
<div><div>CODE</div><div>DESCRIPTION</div><div>DAILY-RENTAL-PRORATE</div><div>Daily Rental - Prorated</div><div>MONTH-END</div><div>Monthly Rental for End</div><div>MONTH-END-OPT</div><div>Monthly Rental for Opt</div><div>MONTH-END-OPT-PRORATE</div><div>Monthly Rental for Opt</div><div>MONTH-END-PRORATE</div><div>Monthly Rental for Prorated End Billing</div><div>MONTH-PR</div><div>Select record "MONTH-END-PRORATE" if - Prorated</div><div>+ New</div></div>					

Click on the button **Yes**

The message regarding the zero price on some lines occurs as on the Rental Package Lines, the Standard Bucket line has the Zero Price field checked.

?

The change in Rental Terms Code for package RP00001 will cause the price for some or all components to be set to zero because no prices exist for MONTH-END-PRORATE term; do you want to continue?

Yes

No

Yes

Click on the cell **Rental Quantity**

STANDARD CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Mini Excavator with Vibrat...	-PRORATE	0		



Enter the text 1.

More options					
DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	
Mini Excavator with Vibrat...	MONTH-END...				
More options					
UNIT OF					

NOTE

A Location Code cannot be entered on the rental line when a package has been selected. Locations are entered on the component rental lines, as it is possible for the units to be located in a variety of locations.

When a Customer card does have a location specified, this location will not populate the Rental Package line on the quote or contract.

Click on the cell **Rental Return Date**

As the example is for a contract with a length of one month and nine days, the Rental Return Date must be changed as follows.

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE
		4/9/2018	5/8/2018	0.00	2,125.97
Type the date in the format M/d/yyyy					
LINE AMOUNT					

Click on the link in cell **Rental Return Date**

RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE
		4/9/2018	5/8/2018	0.00	2,125.97
Select a date					
LINE AMOUNT					

Click on a date in the calendar

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE																																										
	4/9/2018	5/8/2018	0.00	2,125.97	0.00																																										
<div>May 2018</div> <table><tr><td>Mo</td><td>Tu</td><td>We</td><td>Th</td><td>Fr</td><td>Sa</td><td>Su</td></tr><tr><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr><tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr><tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr><tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr><tr><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td></tr></table> <div>Today Done</div>						Mo	Tu	We	Th	Fr	Sa	Su		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Mo	Tu	We	Th	Fr	Sa	Su																																									
	1	2	3	4	5	6																																									
7	8	9	10	11	12	13																																									
14	15	16	17	18	19	20																																									
21	22	23	24	25	26	27																																									
28	29	30	31																																												
TAX GROUP CODE	AMOUNT EXCL. TA			CURRENCY CODE	QTY. TO SH																																										
0 *	0.00	0.00	0																																												



Click on the cell **Rental Unit Price**

The Rental Unit Price will default from the Rental Package price for the selected rental term.

NOTE

The Package line Rental Unit Price can be modified, if the Price Lock is not checked on the package card. The revenue allocation will recalculate the Rental Unit Price on the component line units.

When moving off the rental package line the components setup on the Rental Package Lines will default into the rental lines directly below the package.

RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	AI
4/9/2018	5/17/2018	0.00	2,125.97	0.00	

Click on the cell **Package Line Amount Excl. Tax** with the value **2,125.97**

RENTAL TERMS CODE ALT2	RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
	4/9/2018	5/17/2018	2,125.97	2,125.97	0.0
	4/9/2018	5/17/2018	1,700.78	850.39	0.0
	4/9/2018	5/17/2018	2,125.97	850.39	0.0
	4/9/2018	5/17/2018	850.39	850.39	0.0
			0.00	0.00	0.0
			0.00	0.00	0.0
	4/9/2018	5/17/2018	0.00	0.00	0.0

Click on the cell **Rental Unit Price**

Note that price on the first group component has been revised from the price card on the group of 900.00 to 850.39 during the revenue allocation.

RENTAL START DATE	RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	AI
4/9/2018	5/17/2018	2,125.97	2,125.97	0.00	
4/9/2018	5/17/2018	1,700.78	850.39	0.00	
4/9/2018	5/17/2018	850.39	850.39	0.00	
4/9/2018	5/17/2018	850.39	850.39	0.00	
		0.00	0.00	0.00	
		0.00	0.00	0.00	
4/9/2018	5/17/2018	0.00	0.00	0.00	
4/9/2018	5/17/2018	0.00	0.00	0.00	

Component Lines:

When Locations are used, the specification of the Location code on the Group and/or child units' rental lines is required.

The following demonstrates the specification of the Location on the unit group lines and the selection of the units for the groups.

Click on the cell **Location Code**

ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	R S D
avator with Vib...	MONTH-END...	1				4/
avator Group	MONTH-END...	2				4/
cavator Group	MONTH-END...	1				4/
cavator Group	MONTH-END...	1				4/
ipment inspect...		0				
n checklists mu...		0				
d Bucket Grp f...	MONTH-END...	2				4/
rd Bucket Grp f...	MONTH-END...	1				4/



Click on **Code = EAST**, **Name = East Warehouse**

	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	RENTAL START DATE
with Vib...	MONTH-END...	1				4/9/2018
Group	MONTH-END...	2				4/9/2018
r Group	MONTH-END...	1				
r Group	MONTH-END...	1				
t inspect...		0				
klists mu...		0				
et Grp f...	MONTH-END...	2				
et Grp f...	MONTH-END...	1				

CODE

EAST

NAME

East Warehouse

Select record "EAST"

WEST

West Warehouse

+ New

Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RP00001		Mini Excavator with Vib...		
RU00018		Mini Excavator Group		
		Mini Excavator Group		
		Mini Excavator Group		
		Daily equipment inspect...		
		Inspection checklists mu...		
RU00019		Standard Bucket Grp f...		
		Standard Bucket Grp f...		

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines			Manage	More options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RP00001		Mini Excavator with Vib...		
RU00018		Mini Excavator Group		
		Mini Excavator Group		
		Mini Excavator Group		
		Daily equipment inspect...		
		Inspection checklists mu...		
RU00019		Standard Bucket Grp f...		
		Standard Bucket Grp f...		

Look up value

Click on the link in cell **No.** with the value **RU00018-001**

RENTAL UNIT LIST			+ New
NO.	DESCRIPTION	GROUP	
RU00018-001	Mini Excavator		
RU00018-002	Mini Excavator		
RU00018-003	Mini Excavator		
RU00018-004	Mini Excavator		
RU00018-005	Mini Excavator		



Click on the cell **Rental Unit No.**

Rental Lines			Manage	More options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RP00001		Mini Excavator with Vib...		
RU00018		Mini Excavator Group		
RU00018-C		Mini Excavator		
		Mini Excavator Group		
		Daily equipment inspect...		
		Inspection checklists mu...		
RU00019		Standard Bucket Grp f...		
		Standard Bucket Grp f...		

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines			Manage	More options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		
RP00001		Mini Excavator with Vib...		
RU00018		Mini Excavator Group		
RU00018-001		Mini Excavator		
		Mini Excavator Group		
		Daily equipment inspect...		
		Inspection checklists mu...		
RU00019		Standard Bucket Grp f...		
		Standard Bucket Grp f...		

Click on the link in cell **No.** with the value **RU00018-002**

RENTAL UNIT LIST + New				
NO.	DESCRIPTION	GROUP		
RU00018-001	Mini Excavator			
RU00018-002	Mini Excavator			
RU00018	Select record "RU00018-002" x	cavator		
RU00018-005	Mini Excavator			

Click on the cell **Location Code**

ON	CODE	QUANTITY	CODE	CODE ALT1	CODE ALT2	D
vator with Vib...	MONTH-END...	1				4/
avator Group	MONTH-END...	2	EAST			4/
cavator	MONTH-END...	1	EAST			4/
cavator	MONTH-END...	1	EAST			4/
ipment inspect...		0				
n checklists mu...		0				
d Bucket Grp f...	MONTH-END...	2				4/
rd Bucket Grp f...	MONTH-END...	1				4/
UNIT OF						



ODT Rentals Online Help

Click on **Code = EAST, Name = East Warehouse**

MONTH-END...	1	EAST		4/9/2018
MONTH-END...	1	EAST		4/9/2018
t inspect...	0			
klists mu...	0			
et Grp f...	MONTH-END...	2		4/9/2018
et Grp f...	MONTH-END...	1		

CODE

EAST

NAME

East Warehouse

RENTRECEIVED/

Select record "EAST"

WEST

West Warehouse

LOCATION

CODE

QUANTITY

CODE

EXCL. TAX

CODE

EX

0

0.00

*

Click on the cell **Rental Unit No.**

RP00001		Mini Excavator with Vib...
RU00018		Mini Excavator Group
RU00018-001		Mini Excavator
RU00018-002		Mini Excavator
		Daily equipment inspect...
		Inspection checklists mu...
RU00019		Standard Bucket Grp f...
		Standard Bucket Grp f...

Sales Lines

Manage

More options

Click on the lookup button in the cell **Rental Unit No.**

RP00001		Mini Excavator with Vib...
RU00018		Mini Excavator Group
RU00018-001		Mini Excavator
RU00018-002		Mini Excavator
		Daily equipment inspect...
		Inspection checklists mu...
RU00019		Standard Bucket Grp f...
		Standard Bucket Grp f...

Look up value

Sales Lines

Manage

More options

Click on the link in cell **No.** with the value **RU00019-001**

Search

+ New

Edit List

Delete

Manage

RENTAL UNIT LIST

+ New

NO.	DESCRIPTION	GROUP
RU00019-001	Standard Bucket for Mini Excavator	
RU00019	Select record "RU00019-001" Standard Bucket for Mini Excavator	
RU00019-004	Standard Bucket for Mini Excavator	
RU00019-005	Standard Bucket for Mini Excavator	



Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
		Inspection checklists mu...
RU00019		Standard Bucket Grp f...
RU00019-001		Standard Bucket for M...
...		Standard Bucket Grp f...
RU00021-001		Vibrator Plate for Mini E...
	RENTAL RETU...	Rental Returns
		Rental equipment must ...

Click on the lookup button in the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
		Inspection checklists mu...
RU00019		Standard Bucket Grp f...
RU00019-001		Standard Bucket for M...
...		Standard Bucket Grp f...
RU00021-001		Vibrator Plate for Mini E...
	RENTAL RETU...	Rental Returns
		Rental equipment must ...

Look up value

Click on the link in cell **No.** with the value **RU00019-002**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
RU00019-001	Standard Bucket for Mini Excavator	
RU00019-002	Standard Bucket for Mini Excavator	
RU00019-002	Select record "RU00019-002"	
RU00019-005	Standard Bucket for Mini Excavator	

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
		Inspection checklists mu...
RU00019		Standard Bucket Grp f...
RU00019-001		Standard Bucket for M...
RU00019-C		Standard Bucket for M...
RU00021-001		Vibrator Plate for Mini E...
	RENTAL RETU...	Rental Returns
		Rental equipment must ...

Sales Lines | Manage | More options

Notice that the Standard Text Code selected defaults from the package lines, and when has extended text, will default into the rental lines as well.

Additional rental unit groups and units can be added to the contract, as needed.

Processing of a contact with a rental package is essentially the same processing contracts. A difference is that when running undo shipment, then the undo will run for all component lines.

The contract can be printed by selecting Process, then Print.



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central Rental Contract - RC00008

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/9/2018

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central Rental Contract - RC00008

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigate

Ship Rentals Return Rentals Bulk Returns

Post the shipment of the rental units on the rental lines. A posted delivery

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/9/2018

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

				RENTAL RETURN DATE	PAC AMC
2	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018

Click on the button **OK**

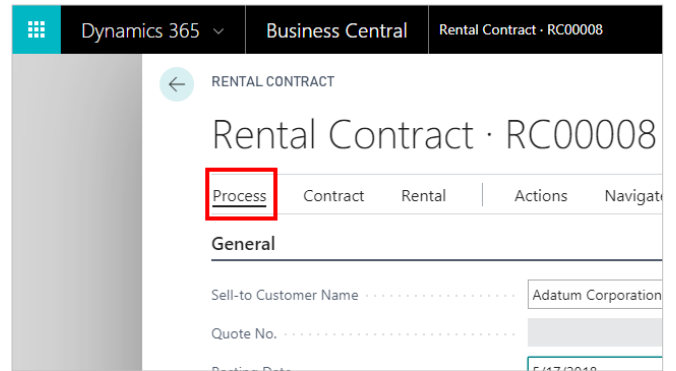
Outstanding Amount

ment Posted Successfully.

OK

				RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX
2	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central Rental Contract · RC00008

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigat

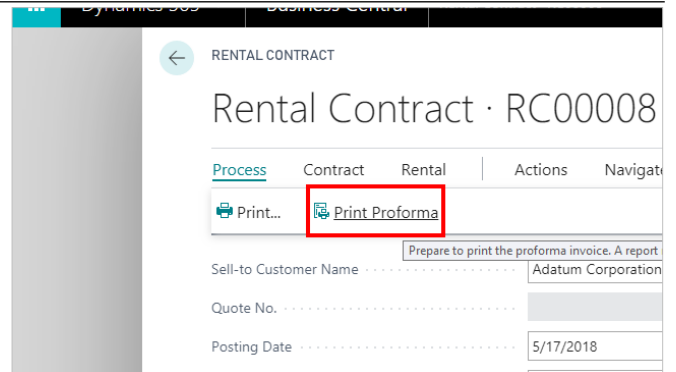
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/17/2018

Click on the navigation menu item **Print Proforma**



Dynamics 365 Business Central Rental Contract · RC00008

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract Rental Actions Navigat

Print... Print Proforma

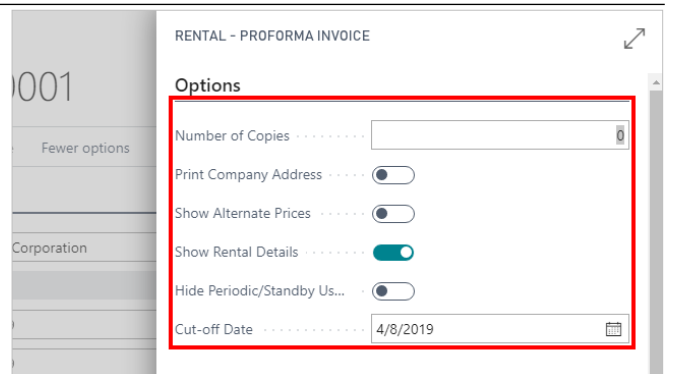
Prepare to print the proforma invoice. A report

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/17/2018

Option tab fields when printing the Proforma Invoice



RENTAL - PROFORMA INVOICE

Options

Number of Copies 0

Print Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

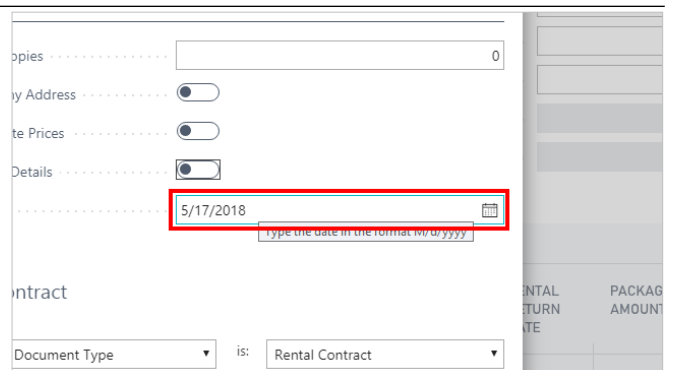
Hide Periodic/Standby Us... .. ☐

Cut-off Date 4/8/2019

For information on following Option tab fields, go to ODT Rentals Online Help, Processing Rentals, Rental Contracts, Rental Contract Overview.

- Number of Copies
- Print Company Address
- Show Rental Details
- Hide Periodic/Standby Usage Details

Click on the field **Cut-off Date**



copies 0

Company Address ☐

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Us... .. ☐

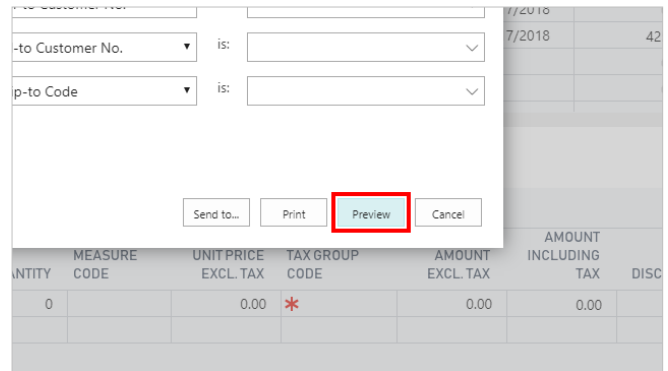
Cut-off Date 5/17/2018

Type the date in the format mm/dd/yyyy

Document Type is: Rental Contract

ODT Rentals Online Help

Click on the button **Preview**

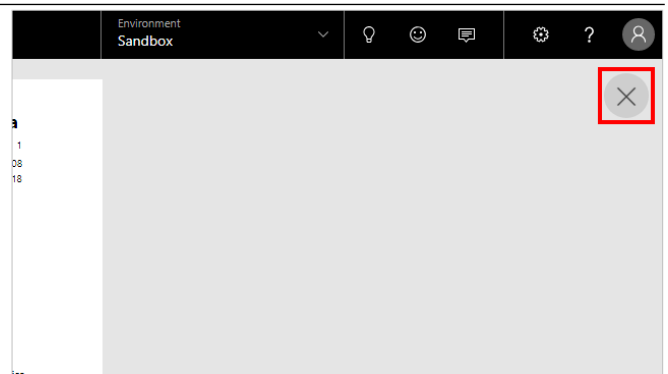


The screenshot shows a web application interface with a modal window open. The modal has a title bar and several input fields. At the bottom of the modal, there are four buttons: 'Send to...', 'Print', 'Preview', and 'Cancel'. The 'Preview' button is highlighted with a red rectangular box. In the background, a table is visible with columns for 'MEASURE CODE', 'UNIT PRICE EXCL. TAX', 'TAX GROUP CODE', 'AMOUNT EXCL. TAX', 'AMOUNT INCLUDING TAX', and 'DISC'. The first row of data shows '0' in the 'MEASURE CODE' column, '0.00' in the 'UNIT PRICE EXCL. TAX' column, a red asterisk in the 'TAX GROUP CODE' column, '0.00' in the 'AMOUNT EXCL. TAX' column, and '0.00' in the 'AMOUNT INCLUDING TAX' column.

Review the Proforma Invoice for what will be billed to the customer.

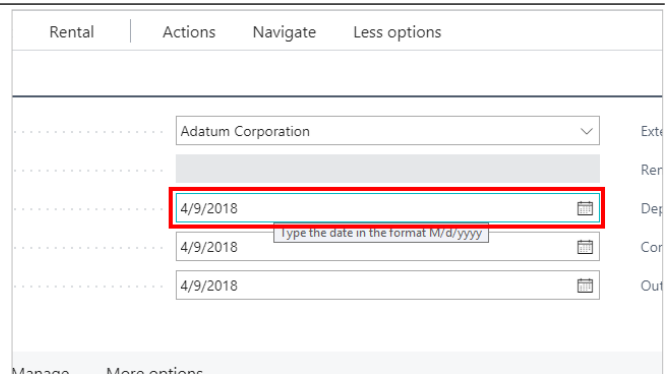
Notice that a rounding amount of 1 cent is in the Sales Charges section. This rounding amount ensures that the revenue allocated to the components, with prices, will equal the rental package price.

Click on the back button



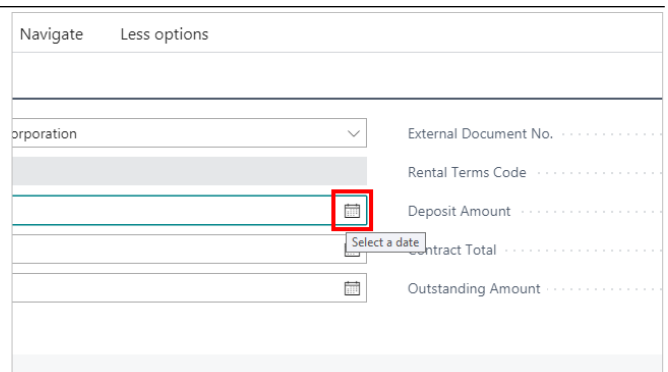
The screenshot shows the top navigation bar of the application. It includes a 'Sandbox' environment selector, a search icon, a lightbulb icon, a smiley face icon, a chat icon, a settings icon, a help icon, and a user profile icon. A red rectangular box highlights a close button (an 'X' icon) in the top right corner of the main content area.

Click on the field **Posting Date**



The screenshot shows a form with a 'Rental' tab selected. Below the tab, there are several input fields. The first field is a dropdown menu with 'Adatum Corporation' selected. Below it, there is a date field with '4/9/2018' entered. This date field is highlighted with a red rectangular box. To the right of the date field, there is a tooltip that says 'Type the date in the format M/d/yyyy'. Below the date field, there are two more date fields, both with '4/9/2018' entered. At the bottom of the form, there are links for 'Manage' and 'More options'.

Click on the link



The screenshot shows a form with a 'Navigate' tab selected. Below the tab, there are several input fields. The first field is a dropdown menu with 'Adatum Corporation' selected. Below it, there is a date field with '4/9/2018' entered. This date field is highlighted with a red rectangular box. To the right of the date field, there is a tooltip that says 'Select a date'. Below the date field, there are two more date fields, both with '4/9/2018' entered. At the bottom of the form, there are links for 'Manage' and 'More options'.



Click on the link **Next**

Adatum Corporation

4/9/2018

April 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

Next

Click on a date in the calendar

4/9/2018

May 2018

Mo Tu We Th Fr Sa Su

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Today Done

STANDARD TEXT CODE	DESCRIPTION	TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Inspection checklists mu...		0	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central Rental Contract · RC00008

RENTAL CONTRACT

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Invoice**

Contract · RC00008

tract Rental Actions Navigate Less options

Return Rentals Bulk Returns **Invoice** Invoice and Print Pos

Finalize the document by posting the amounts and

Adatum Corporation

5/17/2018



ODT Rentals Online Help

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

				RENTAL RETURN DATE	PAC AMC
2	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018

Click on the button **Yes**

The message regarding the zero price on some lines occurs as on the Rental Package Lines the Standard Bucket line has the Zero Price field checked.

Outstanding Amount

There are one or more lines on this rental contract that have a zero price. Do you want to continue invoicing?

Yes No

				RENTAL RETURN DATE	PAC AMC
2	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018

Click on the button **OK**

Invoice Posted Successfully.

OK

				RENTAL RETURN DATE	PACKAGE LINE AMOUNT EXCL. TAX
2	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018
1	EAST			4/9/2018	5/17/2018

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central Rental Contract - RC00008

RENTAL CONTRACT

Rental Contract - RC00008

Process Contract **Rental** Actions Navigate

General

Sell-to Customer Name Adatum Corporation

Quote No.



Click on the navigation menu item **Posted Invoices**

Click on the link in cell **No.** with the value **R00004**

Click on the cell **No.** with the value **61950**

Notice that the Package Rounding Amount line which adjusts the invoice amount to match the Rental Package amount for the one month plus nine days.

Click on the cell **Unit Price Excl. Tax** with the value - **0.01**

To preview, print or send to another document type the Rental Invoice the following demonstrates how to print the Rental Invoice.



Click on the navigation menu item popup **Actions**

The screenshot shows the Dynamics 365 Business Central interface for a 'POSTED SALES INVOICE' for 'R00004 - Adatum Corporation'. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Rental Contract - RC00008 > Posted Sales Invoice'. Below the title bar, there are tabs for 'Invoice', 'Correct', 'Actions', 'Navigate', and 'Less options'. The 'Actions' tab is highlighted with a red box. Below the tabs, the 'General' section shows fields for 'No.' (R00004), 'Customer' (Adatum Corporation), and 'Posting Date'.

Click on the navigation menu item **Print Rental...**

The screenshot shows the Dynamics 365 Business Central interface for a 'POSTED SALES INVOICE' for 'R00004 - Adatum Corporation'. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Rental Contract - RC00008 > Posted Sales Invoice'. Below the title bar, there are tabs for 'Invoice', 'Correct', 'Actions', 'Navigate', and 'Less options'. The 'Actions' tab is highlighted. Below the tabs, there is a sub-menu with options: 'Electronic Document', 'Print...', 'Print Rental...', 'Email', and 'Navigate'. The 'Print Rental...' option is highlighted with a red box. Below the sub-menu, the 'General' section shows fields for 'No.' (R00004), 'Customer' (Adatum Corporation), 'Contact' (Robert Townes), and 'Posting Date'.

The following demonstrates the returning of all the components on the package lines using the Bulk Returns feature.

Click on the navigation menu item popup **Rental**

The screenshot shows the Dynamics 365 Business Central interface for a 'RENTAL CONTRACT' for 'RC00008'. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Rental Contract - RC00008'. Below the title bar, there are tabs for 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Rental' tab is highlighted with a red box. Below the tabs, the 'General' section shows fields for 'Sell-to Customer Name' (Adatum Corporation), 'Quote No.', and 'Posting Date'.

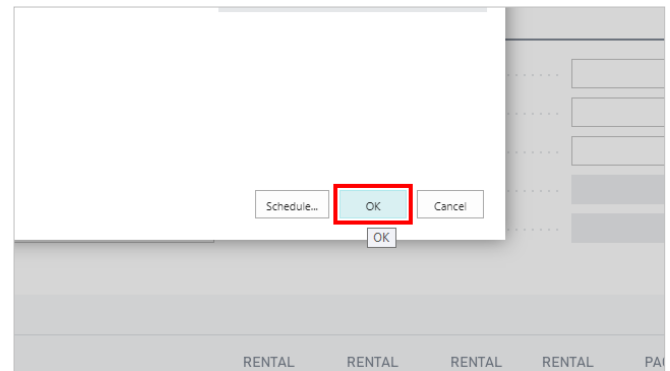
Click on the navigation menu item **Bulk Returns**

The screenshot shows the Dynamics 365 Business Central interface for a 'RENTAL CONTRACT' for 'RC00008'. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Rental Contract - RC00008'. Below the title bar, there are tabs for 'Process', 'Contract', 'Rental', 'Actions', 'Navigate', and 'Less options'. The 'Rental' tab is highlighted. Below the tabs, there is a sub-menu with options: 'Ship Rentals', 'Return Rentals', 'Bulk Returns', 'Invoice', and 'Invoice'. The 'Bulk Returns' option is highlighted with a red box. Below the sub-menu, the 'General' section shows fields for 'Sell-to Customer Name' (Adatum Corporation), 'Quote No.', and 'Posting Date' (5/17/2018).

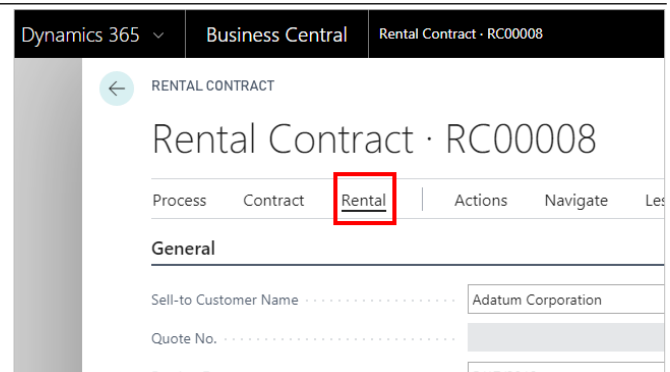
Click on the button **OK**

As the units in the package are being returned on time, then the user only need click on OK.

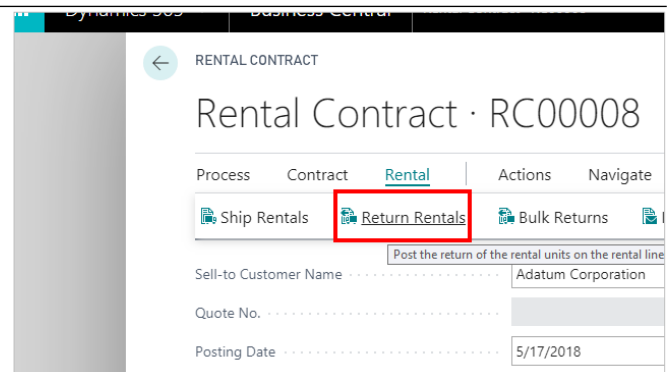
Should the units to be returned on a different date, the Auto Extend can be set to Yes, and the date to be returned entered on the Bulk Returns request page. This will update the Rental Return Date on all component lines of the package.



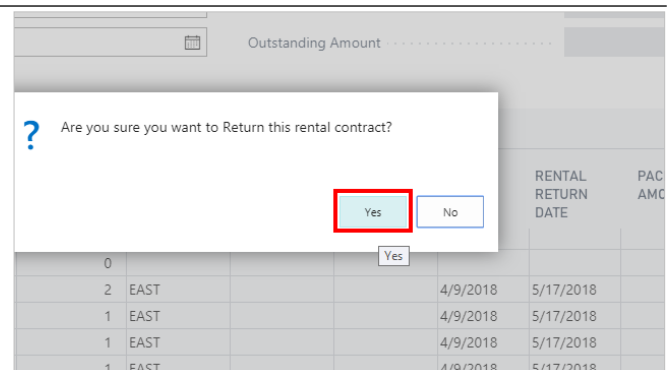
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Return Rentals**



Click on the button **Yes**



4.3.3.2. How to Process Price Allocation Packages with Metered Usage Pricing

4.3.3.2.1. Overview

In order to process rental package with billing metered usage on the package, additional fields will need to be added to the Rental Lines on the Rental Contract and Rental Quote, if applicable, using Personalize.

NOTE:

Metered Usage billing is only available on Price Allocation packages as Rental Price cards are mandatory.



ODT Rentals Online Help

The available fields related to metered usage are covered in the ODT Rental Online Help, Additional Rental Processes, Metered Usage, Processing with Metered Usage Overview. Therefore, they are not repeated here.

The following fields were added to the Rental Lines on the contract:

- Package Price Excl. Tax
- Metered Usage Base Price
- Metered Usage Level 2 Unit Price
- Previous Meter Reading
- Current Meter Reading
- Metered Usage Qty.
- Billable Metered Usage Qty.

In the following chapter, the example demonstrates the processing of a rental contract with a Rental Package for weekly periodic end billing, with a rental price of \$2500.00 per week, and 2 levels of metered usage pricing.

The contract is for 1 week and the metered usage will be entered at the end of the rental period, prior to invoicing and returning the Rental Package.

In this example, the metered usage for the Rental Package is based on a Unit of Measure of Hours and has the Copy Package Metered Usage to Lines field activated.

For the package line, the usage must be entered in the Metered Usage Qty field, which defaults to the Billable Metered Usage Qty. field. A Metered Usage Entry and Rental Amount Lines are created for metered usage on the package line.

The Previous Meter Reading and Current Meter Reading fields cannot be edited on the package rental line.

The package components consist of:

- A rental unit group, which has the Metered Usage Enabled field activated, and has Hours as the Metered Usage UOM.
- A rental unit group that does not have metered usage configured.
- A rental unit group, which has the Metered Usage Enabled field activated, and has Miles as the Metered Usage UOM.

As the package field, Copy Package Metered Usage to Lines, is activated, the Metered Usage Qty. entered on the rental package line on the contract will be copied to the component unit in the group that has the same metered usage UOM. The Current Meter Reading on the rental line for that unit can be modified, if needed.

It will not be copied to any units or the units in a group that has a different Metered Usage UOM. The Current Meter Reading will have to be entered separately on the rental line for those units.

The Metered Usage Qty. and Billable Metered Usage Qty. fields will not be populated, and cannot be modified for component units as the usage is for maintenance tracking only. The Metered Usage Entries can be reviewed by selecting Line, then Metered Usage Entries.

The Rental Package pricing for the metered usage is as follows:

- The first level has a limit of 40 hours, with a price of \$40.00 per hour. Therefore, any hours from 1 to 40 will be billed to the customer at \$40.00 per hour.
- The second level has a price of \$80.00. Therefore, any hours above 40 will be billed to the customer at \$80.00 per hour.

4.3.3.2.2. Metered Usage Prices

How to Process a Contract with a Rental Package with



Click on the navigation menu item **Rental Contract**

Rental TermsRental UnitsRental Packages

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

+ Rental Unit

> New

> Payments

> Reports

Create a new rental contract for rental product.

Click on the field **Sell-to Customer Name**

DATE: 1/1/2024

More options

Click on the link in cell **No.** with the value **10000**

ContractRentalMore options

Customer Name

No.↑NameZIP

→10000Adatum Corporation31

20000Trey Research61

30000School of Fine Art37

40000Alpine Ski House31

50000Relecloud31

+ New

Click on the cell **Rental Unit No.**

Rental LinesManageLineFunctionsFewer options

Rental Unit No.

Standard Text Code

Description

Rental Terms Code

Look up value



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Fewer options
	Rental Unit No.	Standard Text Code	Description			Rental Terms Code	
→	<div>Adatum Corporation</div>						

Click on the link in cell **No.** with the value **RP00002**

Contract · RC00049		RENTAL UNIT LIST	
Contract	Rental	More options	
	No. ↑		Description
	→ PG-001	:	Portable Generators
	RP00001	:	Mini Excavator with Vibra
	<div>RP00002</div>	:	Wacker Skid Steer Packag
	RU00007	:	165 G Brad Nailer
	RU00026	:	Wacker Hammer Drill Bits
	RU00027	:	Air Impact Wrench 1 inch
	BD-006	:	Buckeye Ditcher
	RU00001	:	Buckeye Ditcher Group

Click on the cell **Rental Terms Code** with the value **WEEK-PEND**

Manage							Line	Functions	Fewer options
	Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1			
:		Wacker Skid Steer Package	<div>WEEK-PEND</div>	0					

Click on the cell **Rental Quantity** with the value **0**

Functions							Fewer options
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2		
Wacker Skid Steer Package	<div>WEEK-PEND</div>	<div>0</div>					



ODT Rentals Online Help

Enter the text 1.

Functions		Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
Wacker Skid Steer Package	WEEK-PEND	1			

Click on the cell **Rental Return Date** with the value **7/13/2020**

The Rental Return Date is calculated and populated based on the Rental Period on the Rental Term on the line. This date can be modified and will update all the component lines.

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Line Amount Excl. Tax	Rental Unit Price	Alt1 Rental Unit Price
1			7/7/2020	7/13/2020	2,500.00	2,500.00	0.00

The following metered usage related fields defaulted from the Rental Price card setup on the Rental Package.

Click on the cell **Usage Unit of Measure** with the value **HOURL**

Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Metered Usage Enabled	Usage Unit of Measure	Allow Zero Usa...	Metered Usage Base P...
2,500.00	0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	40.00
1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	0.00
1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	0.00
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00

Click on the cell **Metered Usage Base Price** with the value **40.00**

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Metered Usage Enabled	Usage Unit of Measure	Allow Zero Usa...	Metered Usage Base P...
0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	40.00
0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	0.00
0.00	0.00	<input checked="" type="checkbox"/>	HOURL	<input type="checkbox"/>	0.00
0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00

ODT Rentals Online Help

Click on the cell **Metered Usage Level 2 Unit Price** with the value **80.00**

Selected	Usage Unit of Measure	Allow Zero Usage	Metered Usage Base Price	Metered Usage Level 2 Price	Previous Meter Reading	Current Meter Reading
<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	40.00	80.00	0	0
<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00	0.00	0	0
<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00	0.00	0	0
<input type="checkbox"/>		<input type="checkbox"/>	0.00	0.00	0	0
<input type="checkbox"/>		<input type="checkbox"/>	0.00	0.00	0	0
<input type="checkbox"/>		<input type="checkbox"/>	0.00	0.00	0	0
<input type="checkbox"/>		<input type="checkbox"/>	0.00	0.00	0	0

The following steps are the selection of the Rental Units for the group components setup on the Rental Package.

Click on the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Fewer options		
Rental Unit No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Amount	
→ RP00002	⋮		7/7/2020	7/13/2020	2.50	
RU00022			7/7/2020	7/13/2020	1.78	
	⋮		7/7/2020	7/13/2020	1.78	
RU00028			7/7/2020	7/13/2020	26	
			7/7/2020	7/13/2020	26	
RU00023			7/7/2020	7/13/2020	44	
			7/7/2020	7/13/2020	44	

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Fewer options		
Rental Unit No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Package Amount	
RP00002			7/7/2020	7/13/2020	2.50	
RU00022			7/7/2020	7/13/2020	1.78	
→ <input type="text" value="RU00022"/>			7/7/2020	7/13/2020	1.78	
RU00028			7/7/2020	7/13/2020	26	
			7/7/2020	7/13/2020	26	
RU00023			7/7/2020	7/13/2020	44	
			7/7/2020	7/13/2020	44	

Click on the link in cell **No.** with the value **RU00022-001**

CONTRACT | WORK DATE: 7/7/2020

Contract · RC00049

Contract Rental More options

Customer Name Address 7/7/2020

RENTAL UNIT LIST

No. ↑	Description
RU00022-001	Wacker Skid Steer
RU00022-002	Wacker Skid Steer



ODT Rentals Online Help

Click on the cell **Usage Unit of Measure** with the value **HOUR**

Note that the Wacker Skid Rental Unit has the same Usage Unit of Measure as on the Rental Package line and contains 25 in both the Previous Meter Reading and Current Meter Reading fields.

Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Metered Usage Enabled	Usage Unit of Measure	Allow Zero Usa...	Metered Usage Base P...	Metered
2,500.00	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	40.00	
1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00	
1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00	
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00	
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00	
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00	
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00	
446.43	0.00	0.00	<input checked="" type="checkbox"/>	MILES	<input type="checkbox"/>	0.00	
446.43	0.00	0.00	<input checked="" type="checkbox"/>	MILES	<input type="checkbox"/>	0.00	

Click on the cell **Rental Unit No.**

Rental Unit No.	Code Alt1	Code Alt2	Date	Date	
RP00002			7/7/2020	7/13/2020	2.50
RU00022			7/7/2020	7/13/2020	1.78
→ RU00022-01			7/7/2020	7/13/2020	1.78
RU00028			7/7/2020	7/13/2020	26
			7/7/2020	7/13/2020	26
RU00023			7/7/2020	7/13/2020	44
			7/7/2020	7/13/2020	44

Click on the lookup button in the cell **Rental Unit No.**

Rental Unit No.	Code Alt1	Code Alt2	Date	Date	
RP00002			7/7/2020	7/13/2020	2.50
RU00022			7/7/2020	7/13/2020	1.78
RU00022-001			7/7/2020	7/13/2020	1.78
RU00028			7/7/2020	7/13/2020	26
→			7/7/2020	7/13/2020	26
RU00023			7/7/2020	7/13/2020	44
			7/7/2020	7/13/2020	44

Click on the link in cell **No.** with the value **RU00028-001**

TRACT | WORK DATE: 7/7/2020		Search Rental Open in Excel M	
Contract · RC00049			
Contract Rental More options			
Rental Unit List			
No. ↑	Description		
→ RU00028-001	Wacker Skid - Pallet Fork		
RU00028-002	Wacker Skid - Pallet Fork		
RU00028-003	Wacker Skid - Pallet Fork		



Click on the cell **Rental Unit No.**

RU00022				7/7/2020	7/13/2020	1.78
RU00022-001				7/7/2020	7/13/2020	1.78
RU00028				7/7/2020	7/13/2020	26
→ RU00028-01 ...				7/7/2020	7/13/2020	26
RU00023				7/7/2020	7/13/2020	44
				7/7/2020	7/13/2020	44

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

RU00022				7/7/2020	7/13/2020	1.78
RU00022-001				7/7/2020	7/13/2020	1.78
RU00028				7/7/2020	7/13/2020	26
RU00028-001				7/7/2020	7/13/2020	26
RU00023				7/7/2020	7/13/2020	44
→				7/7/2020	7/13/2020	44

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00023-003**

Contract · RC00049		RENTAL UNIT LIST	
Contract	Rental	More options	
No. ↑	Description		
RU00023-001	Ford 150 Trucks		
RU00023-002	Ford 150 Trucks		
RU00023-003	Ford 150 Trucks		
Select record "RU00023-003"			

Click on the cell **Usage Unit of Measure** with the value **MILES**

Note that the Ford Truck has a different Usage Unit of Measure than the rental package line. Therefore, when the Metered Usage Qty. is entered on the package it will not update the Ford Truck unit line.

1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00
1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
267.86	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
446.43	0.00	0.00	<input checked="" type="checkbox"/>	MILES	<input type="checkbox"/>	0.00
446.43	0.00	0.00	<input checked="" type="checkbox"/>	MILES	<input type="checkbox"/>	0.00

MILES

The contract can be printed or previewed by selecting the menu option, Process, then Print.

The contract is ready for shipping.

When a Rental Package with Metered Usage pricing is shipped a Rental Ledger Entry is created for the package line to facilitate the creation of the Rental Amount Lines, when the Billable Metered Usage Qty. is populated on the package line.



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00049 | WORK DATE: 7/7/2020

Rental Contract · RC00049

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

EDIT - RENTAL CONTRACT - RENTAL CONTRACT · RC00049 | WORK DATE: 7/7/2020

Rental Contract · RC00049

Process Contract Rental More options

Ship Rentals Return Rentals Bulk Returns Invoice Inv

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

	Qty. to Return	Qty. Returned
0	0	0
25	0	0
0	0	0
0	0	0
0	0	0

Click on the button **OK**

Outstanding Amount

Shipment Posted Successfully.

OK

	Usage Unit of Measure	Allow Zero Usa...	Metered Usa...
2020	1,785.71	1,785.71	0.00
2020	1,785.71	1,785.71	0.00
2020	0.00	0.00	0.00
2020	0.00	0.00	0.00
2020	267.86	267.86	0.00



Click on the field **Posting Date**

More options

Adatum Corporation

7/7/2020

7/7/2020

7/7/2020

Click on the link **Open the date picker**

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Select the date the metered usage quantities and return is occurring on.

7/7/2020

July 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Go to today Done

Unit No.	Rental Terms Code	Rental Quantity	Location Code	Terms Code Alt1	Terms Code Alt2	Rental Start Date	Rental Return Date
002	WEEK-PEND	1				7/7/2020	7/13/2020

The following steps cover the entry of the Metered Usage Qty. on the package line, the copying of the usage to the rental unit line that has the same usage UOM and the review of the Rental Amount Lines for the package.

Click on **Rental Unit No. = RP00002, Rental Terms Code = WEEK-PEND, Rental Quantity = 1**

Rental Lines Manage Line Functions Fewer options

Rental Unit No.	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
→ RP00002	1				7/7/2020
RU00022	1				7/7/2020
RU00022-001	1	EAST			7/7/2020
	0				
	0				
RU00028	1				7/7/2020
RU00028-001	1	EAST			7/7/2020



Click on the cell **Metered Usage Qty.** with the value **0**

Metered Usage Level 2 ...								
	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code		
	80.00	0	0	0		SUPPLIES		
	0.00	0	0	Look up value	0	SUPPLIES		
	0.00	25	25	0	0	SUPPLIES		
	0.00	0	0	0	0			
	0.00	0	0	0	0			
	0.00	0	0	0	0	SUPPLIES		
	0.00	0	0	0	0	SUPPLIES		

Enter the text **50**. Press the **TAB** key.

Metered Usage Level 2 ...								
	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code		
	80.00	0	0	50	0	SUPPLIES		
	0.00	0	0	0	0	SUPPLIES		
	0.00	25	25	0	0	SUPPLIES		
	0.00	0	0	0	0			
	0.00	0	0	0	0			
	0.00	0	0	0	0	SUPPLIES		
	0.00	0	0	0	0	SUPPLIES		

Click on the cell **Billable Metered Usage Qty.** with the value **50**

The Billable Metered Usage Qty. field is automatically populated with the same quantity as the Metered Usage Qty. and can be modified.

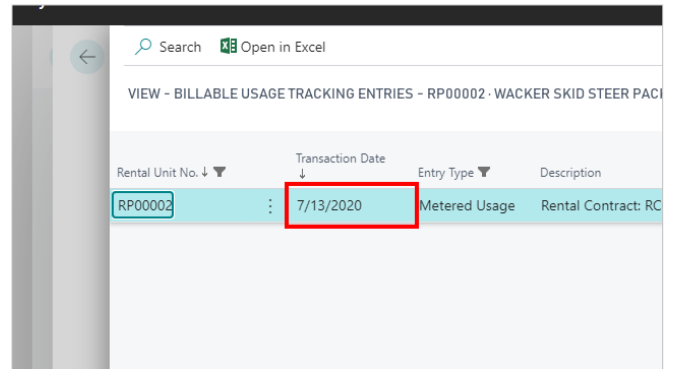
Metered Usage Level 2 ...								
	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. to Return
	80.00	0	0	50	50	SUPPLIES	0	
	0.00	0	0	0	50	SUPPLIES	0	
	0.00	75	75	0	0	SUPPLIES	0	
	0.00	0	0	0	0		0	
	0.00	0	0	0	0		0	
	0.00	0	0	0	0	SUPPLIES	0	
	0.00	0	0	0	0	SUPPLIES	0	

Click on the lookup button in the cell **Billable Metered Usage Qty.**

Metered Usage Level 2 ...								
	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Group Code	Qty. to Rent	Qty. to Return
	0.00	0	0	50	50	SUPPLIES	0	0
	0.00	0	0	0	0	SUPPLIES	0	0
	0.00	75	75	0	0	SUPPLIES	0	1
	0.00	0	0	0	0		0	0
	0.00	0	0	0	0		0	0
	0.00	0	0	0	0	SUPPLIES	0	0
	0.00	0	0	0	0	SUPPLIES	0	1

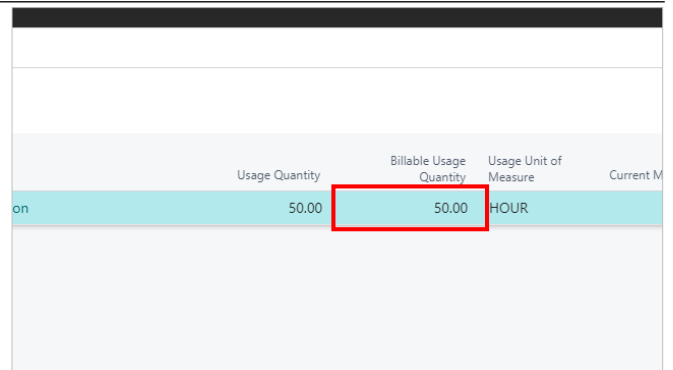
Click on the cell **Transaction Date** with the value **7/13/2020**

Note that the Transaction Date contains the same date as the Posting Date on the contract.



Rental Unit No. ↓	Transaction Date	Entry Type	Description
RP00002	7/13/2020	Metered Usage	Rental Contract: RC

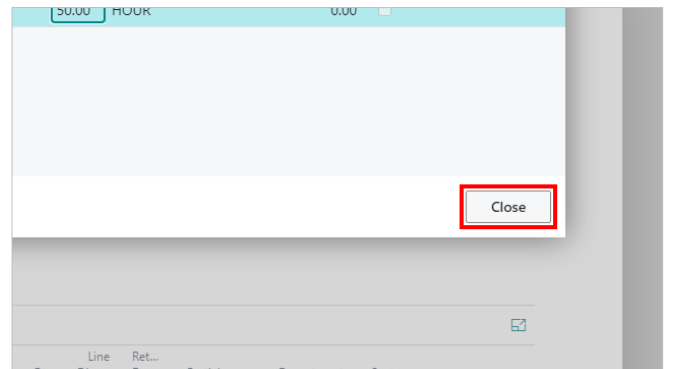
Click on the cell **Billable Usage Quantity** with the value **50.00**



Usage Quantity	Billable Usage Quantity	Usage Unit of Measure	Current M
50.00	50.00	HOURL	

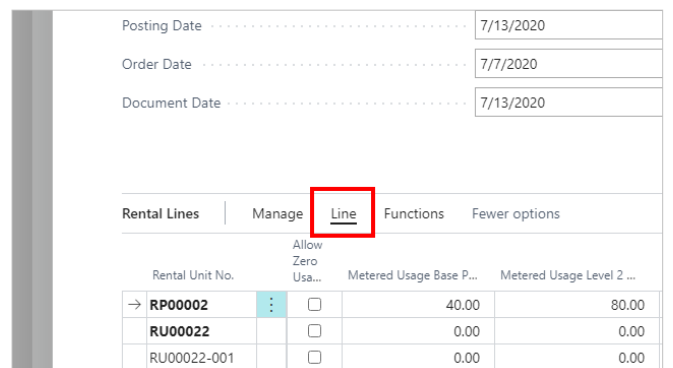
The Billable Metered Usage Qty. is the quantity that is used to populate the Rental Amounts Lines on the package line, which in turn are used to when the contract is invoiced. Rental Value Entries are created for the package line when the invoice is posted, and can be accessed from the contract or the Rental Package card.

Click on the button **Close**



The following is a review of the Rental Amount Lines for the rental package line.

Click on the navigation menu item popup **Line**



Posting Date	Order Date	Document Date
7/13/2020	7/7/2020	7/13/2020

Rental Lines	Manage	Line	Functions	Fewer options
→ RP00002	⋮	<input type="checkbox"/>	40.00	80.00
RU00022		<input type="checkbox"/>	0.00	0.00
RU00022-001		<input type="checkbox"/>	0.00	0.00



Click on the navigation menu item **Rental Amount Lines**

Order Date 7/7/2020
Document Date 7/13/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

view the rental amount line records that will be billed for the selected rental line

→ RP00002	:	<input type="checkbox"/>	40.00	80.00
RU00022	:	<input type="checkbox"/>	0.00	0.00
RU00022-001	:	<input type="checkbox"/>	0.00	0.00
	:	<input type="checkbox"/>	0.00	0.00
	:	<input type="checkbox"/>	0.00	0.00

Click on the cell **Extended Quantity** with the value **40**

Note that there are 2 Rental Amount Lines for metered usage.

el

AMOUNTS

ng Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax
2020 12:00 AM	7/13/2020 11:59 PM	40	40.00
2020 12:00 AM	7/13/2020 11:59 PM	10	80.00

The first line with 40 is the quantity to be billed at the Metered Usage base unit price which is on the rental line.

The second line is for the quantity over the level 1 end quantity of 40. The quantity of 10 will be billed at the Metered Usage Level 2 Unit Price.

Click on the button **Close**

1,632.00	SUPPLIES	7/13/2020	<input type="checkbox"/>
816.00	SUPPLIES	7/13/2020	<input type="checkbox"/>

Close

Previous | Current | Metered | Billable | Usage | Metered | Usage | Metered

The following is a review of the component Rental Unit that has the same Metered Usage UOM.

Click on **Rental Unit No. = RU00022-001, Rental Terms Code = WEEK-PEND, Rental Quantity = 1**

Rental Lines	Manage	Line	Functions	Fewer options		
Rental Unit No.		Package Line Amount Excl. Tax	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Meter Usage Enable
→ RP00002	⋮	2,500.00	2,500.00	0.00	0.00	<input type="checkbox"/>
RU00022	⋮	1,785.71	1,785.71	0.00	0.00	<input type="checkbox"/>
RU00022-001	⋮	1,785.71	1,785.71	0.00	0.00	<input type="checkbox"/>
		0.00	0.00	0.00	0.00	<input type="checkbox"/>
		0.00	0.00	0.00	0.00	<input type="checkbox"/>
RU00028		267.86	267.86	0.00	0.00	<input type="checkbox"/>
RU00028-001		267.86	267.86	0.00	0.00	<input type="checkbox"/>
RU00023		446.43	446.43	0.00	0.00	<input type="checkbox"/>
RU00023-003		446.43	446.43	0.00	0.00	<input type="checkbox"/>



Click on the cell **Current Meter Reading** with the value **75**

Usage Base P...	Metered Usage Level 2 ...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Gr Co
40.00	80.00	0	0	50	50		SU
0.00	0.00	0	0	0	0		SU
0.00	0.00	75	75	0	0		SU
0.00	0.00	0	0	0	0		
0.00	0.00	0	0	0	0		
0.00	0.00	0	0	0	0		SU
0.00	0.00	0	0	0	0		SU
0.00	0.00	0	0	0	0		SU
0.00	0.00	6,700	6,700	0	0		SU

Click on the navigation menu item popup **Line**

Posting Date 7/13/2020

Order Date 7/7/2020

Document Date 7/13/2020

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Unit No.	Package Line Amount Excl. Tax	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Meter Usage Enable
RP00002	2,500.00	2,500.00	0.00	0.00	<input type="checkbox"/>
RU00022	1,785.71	1,785.71	0.00	0.00	<input type="checkbox"/>
→ RU00022-001	1,785.71	1,785.71	0.00	0.00	<input type="checkbox"/>

Click on the navigation menu item **Metered Usage Entries**

..... 7/7/2020

..... 7/13/2020

Line | Functions | Fewer options

Rental Ledger Entries | Rental Value Entries | **Metered Usage Entries** | Periodic Usage Entries

View and edit the metered usage entries for t

Usage Base P...	Metered Usage Level 2 ...	Previous Meter Reading	Current Meter Reading	Metered Usage Qty.	Billable Metered Usage Qty.	Curre... Code	Tax Gr Co
500.00	2,500.00	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	40.00
785.71	1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00
785.71	1,785.71	0.00	0.00	<input checked="" type="checkbox"/>	HOUR	<input type="checkbox"/>	0.00
0.00	0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00
0.00	0.00	0.00	0.00	<input type="checkbox"/>		<input type="checkbox"/>	0.00

Click on the cell **Usage Quantity** with the value **50.00**

Document	Source Document Line No.	Customer Name	Usage Quantity	Billable Usage Quantity	Usage Unit of Measure
9	-	-	50.00	0.00	HOUR
	-	-	25.00	0.00	HOUR



Click on the button **Close**

A screenshot of a software interface showing a modal window. The window has a title bar and a content area. In the bottom right corner of the content area, there is a button labeled "Close". This button is highlighted with a red rectangular box.

The following demonstrates the review and entry of a current meter reading on the Ford Truck unit line.

Click on **Rental Unit No. = RU00023-003, Rental Terms Code = WEEK-PEND, Rental Quantity = 1**

	RU00022		1,785.71	1,785.71	0.00	0.00	
→	RU00022-001	:	1,785.71	1,785.71	0.00	0.00	
			0.00	0.00	0.00	0.00	
			0.00	0.00	0.00	0.00	
	RU00028		267.86	267.86	0.00	0.00	
	RU00028-001		267.86	267.86	0.00	0.00	
	RU00023		446.43	446.43	0.00	0.00	
	RU00023-003	:	446.43	446.43	0.00	0.00	

Sales Lines | Manage | More options

Click on the cell **Current Meter Reading** with the value **6,700**

0.00	0.00	0	0	0	0	SU
0.00	0.00	75	75	0	0	SU
0.00	0.00	0	0	0	0	
0.00	0.00	0	0	0	0	
0.00	0.00	0	0	0	0	SU
0.00	0.00	0	0	0	0	SU
0.00	0.00	0	0	0	0	SU
0.00	0.00	6,700	6,700	0	0	SU

Enter **Current Meter Reading**. Press the **Enter** key.

0.00	0.00	0	0	0	0	SU
0.00	0.00	75	75	0	0	SU
0.00	0.00	0	0	0	0	
0.00	0.00	0	0	0	0	
0.00	0.00	0	0	0	0	SU
0.00	0.00	0	0	0	0	SU
0.00	0.00	0	0	0	0	SU
0.00	0.00	6,700	6,700	0	0	SU

ODT Rentals Online Help

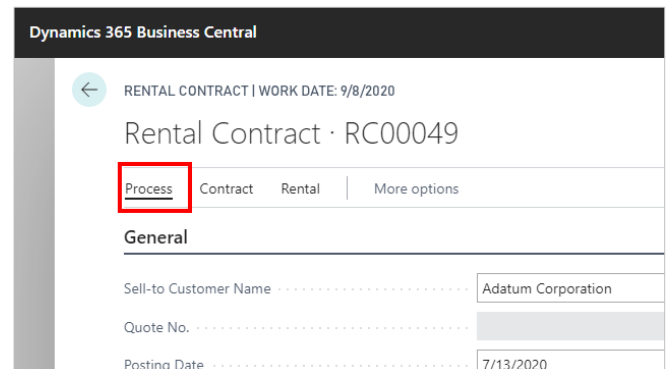
Click on the cell **Billable Metered Usage Qty.** with the value **0**

0.00	0	0	0	0	SUPPLIES	0
0.00	75	75	0	0	SUPPLIES	0
0.00	0	0	0	0		0
0.00	0	0	0	0		0
0.00	0	0	0	0	SUPPLIES	0
0.00	0	0	0	0	SUPPLIES	0
0.00	0	0	0	0	SUPPLIES	0
0.00	7,400	7,400	0	0	SUPPLIES	0

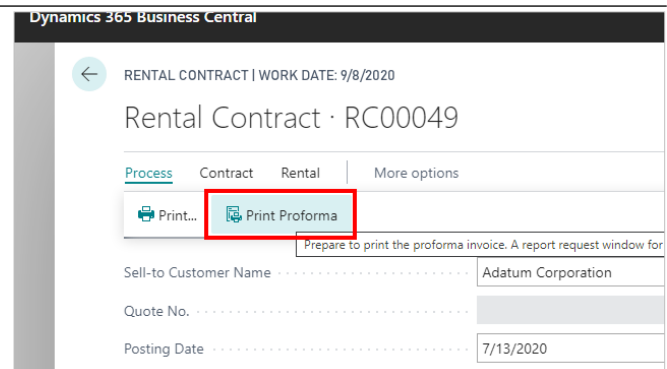
On the component units requiring the entry of a reading or quantity of usage, the Billable Metered Usage Qty. field will not be populated, as the usage is only for maintenance tracking purposes.

A Proforma Invoice can be printed or previewed to review what will be billed to the customer.

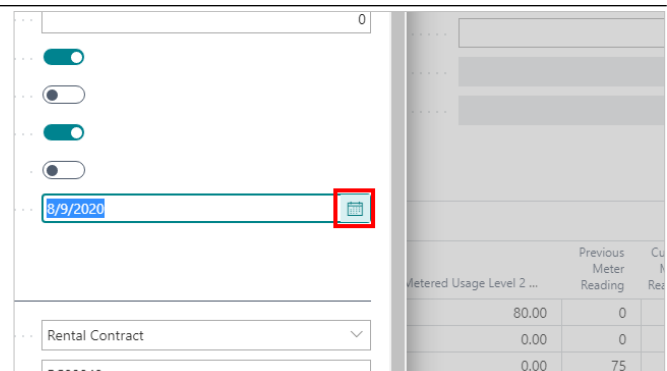
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Print Proforma**



Click on the link **Open the date picker**





Click on the link **Previous**

The screenshot shows the 'Previous' link highlighted in blue. Below it, a calendar for August 2020 is displayed. The date 8/9/2020 is selected, and the calendar is set to show the week starting on Sunday. The calendar is titled 'August 2020' and shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa). The date 8/9/2020 is highlighted in blue. The calendar is part of a larger form that includes fields for 'Print Company Address', 'Show Alternate Prices', 'Show Rental Details', 'Hide Periodic/Standby Usage Det...', and 'Cut-off Date'.

Click on a date in the calendar

The screenshot shows the calendar for July 2020. The date 7/13/2020 is selected, and the calendar is set to show the week starting on Sunday. The calendar is titled 'July 2020' and shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa). The date 7/13/2020 is highlighted in blue. The calendar is part of a larger form that includes fields for 'Hide Periodic/Standby Usage Det...', 'Cut-off Date', and 'Filter: Rental Contract'.

Click on the button **Preview**

The screenshot shows the 'Preview' button highlighted in red. The button is located at the bottom of the form, next to the 'Send to...', 'Print', and 'Cancel' buttons. The form also includes fields for 'Customer No.', 'Order No.', and 'Additional Note'.

The following demonstrates the invoicing of the contract, a review of the Rental Package, Rental Amount Lines and the Posted Rental Invoice.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date the invoice is for.

The screenshot shows the 'Posting Date' field highlighted in red. The field is located in the 'More options' section of the form. The field is set to 7/13/2020. The field is part of a larger form that includes fields for 'Adatum Corporation', '7/7/2020', and '7/13/2020'.



Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 9/8/2020

Rental Contract · RC00049

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/13/2020

Click on the navigation menu item **Invoice**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 9/8/2020

Rental Contract · RC00049

Contract Rental More options

Rentals **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

Posting Date 7/13/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

						Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
1			7/7/2020	7/13/2020	1,785.71	1,785.71	0.00	0.00
1	EAST		7/7/2020	7/13/2020	1,785.71	1,785.71	0.00	0.00
0					0.00	0.00	0.00	0.00
0					0.00	0.00	0.00	0.00
1			7/7/2020	7/13/2020	267.86	267.86	0.00	0.00

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

						Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
			7/7/2020	7/13/2020	1,785.71	1,785.71	0.00	0.00
			7/7/2020	7/13/2020	1,785.71	1,785.71	0.00	0.00
					0.00	0.00	0.00	0.00
					0.00	0.00	0.00	0.00
			7/7/2020	7/13/2020	267.86	267.86	0.00	0.00



Click on **Rental Unit No. = RP00002**, **Rental Terms Code = WEEK-PEND**, **Rental Quantity = 1**

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
→ RP00002	:	Wacker Skid Steer Package	WEEK-PEND	
RU00022	:	Wacker Skid Steer Group	WEEK-PEND	
RU00022-001	:	Wacker Skid Steer	WEEK-PEND	
	:	Daily equipment inspections ...		
	:	Inspection checklists must be ...		
RU00028	:	Wacker Skid - Pallet Fork G...	WEEK-PEND	
RU00028-001	:	Wacker Skid - Pallet Fork	WEEK-PEND	

Click on the navigation menu item popup **Line**

Posting Date	7/13/2020
Order Date	7/7/2020
Document Date	7/13/2020

Rental Lines	Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
→ RP00002	:	Wacker Skid Steer Package	WEEK-PEND	
RU00022	:	Wacker Skid Steer Group	WEEK-PEND	
RU00022-001	:	Wacker Skid Steer	WEEK-PEND	

Click on the navigation menu item **Rental Amount Lines**

Order Date	7/7/2020
Document Date	7/13/2020

Rental Lines	Manage	Line	Functions	Fewer options
Rental Amount Lines Rental Ledger Entries Rental Value Entries				
View the rental amount line records that will be billed for the selected rental line w				
→ RP00002	:	Wacker Skid Steer Package	WEEK-PEND	
RU00022	:	Wacker Skid Steer Group	WEEK-PEND	
RU00022-001	:	Wacker Skid Steer	WEEK-PEND	
	:	Daily equipment inspections ...		
	:	Inspection checklists must be ...		

Click on the cell **Invoice No.** with the value **RI00040**

Note that the Billed field is checked and the Invoice No. field contains the invoice number the usage was invoiced on.

Including Tax	Tax Group Code	Billing Date ↑	Billed	Invoice No.
1,632.00	SUPPLIES	7/13/2020	<input checked="" type="checkbox"/>	RI00040
816.00	SUPPLIES	7/13/2020	<input checked="" type="checkbox"/>	RI00040



ODT Rentals Online Help

Click on the button **Close**

1,632.00 SUPPLIES 7/13/2020 RI00040

816.00 SUPPLIES 7/13/2020 RI00040

Close

Alt1 Rental Alt2 Rental Metered Usage Allow

Click on the navigation menu item popup **Line**

Posting Date 7/13/2020

Order Date 7/7/2020

Document Date 7/13/2020

Rental Lines Manage **Line** Functions Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RP00002		Wacker Skid Steer Package	WEEK-PEND
RU000022		Wacker Skid Steer Group	WEEK-PEND
RU00022-001		Wacker Skid Steer	WEEK-PEND

Click on the navigation menu item **Metered Usage Entries**

7/7/2020

7/13/2020

Line Functions Fewer options

Rental Ledger Entries Rental Value Entries **Metered Usage Entries** Periodic Usage Entries

Description	WEEK-PEND	1			
Wacker Skid Steer Package	WEEK-PEND	1			
Wacker Skid Steer Group	WEEK-PEND	1			
Wacker Skid Steer	WEEK-PEND	1	EAST		
Daily equipment inspections ...		0			
Inspection cheklists must be ...		0			

Click on the cell **Invoice No.** with the value **RI00040**

Note that the Billed field is checked and the Invoice No. field contains the invoice number the usage was invoiced on.

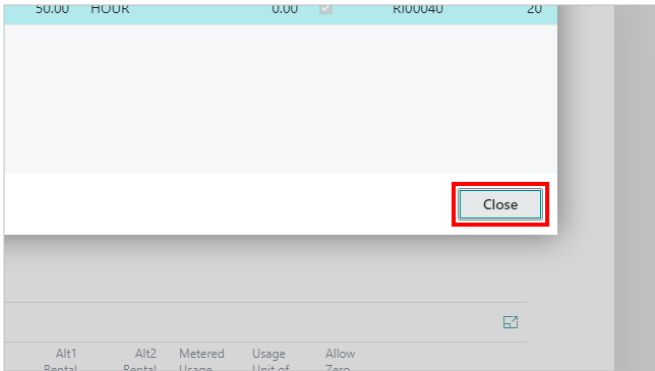
Table Usage Usage Unit of Current Meter Billed Invoice No. Entry No.

Quantity Measure Reading

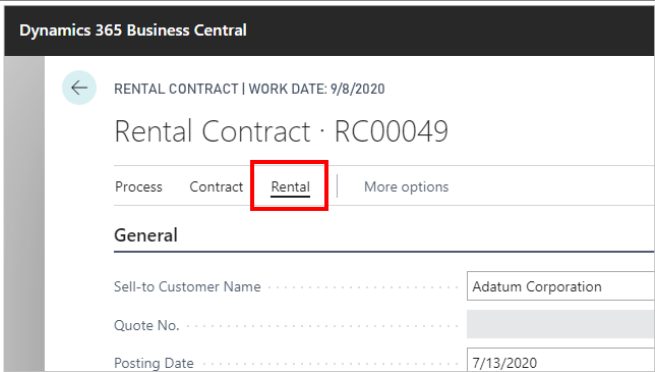
50.00	HOUR	0.00	<input checked="" type="checkbox"/>	RI00040	20
-------	------	------	-------------------------------------	---------	----



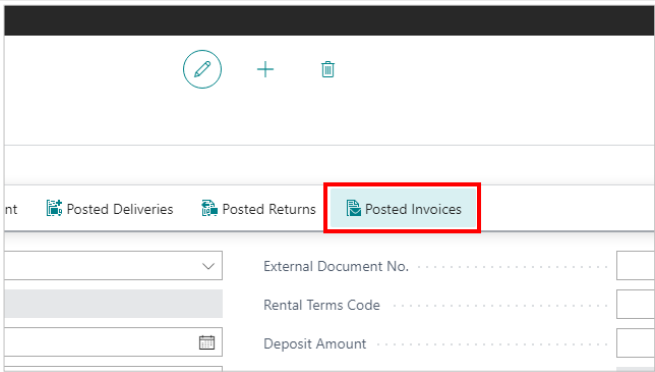
Click on the button **Close**



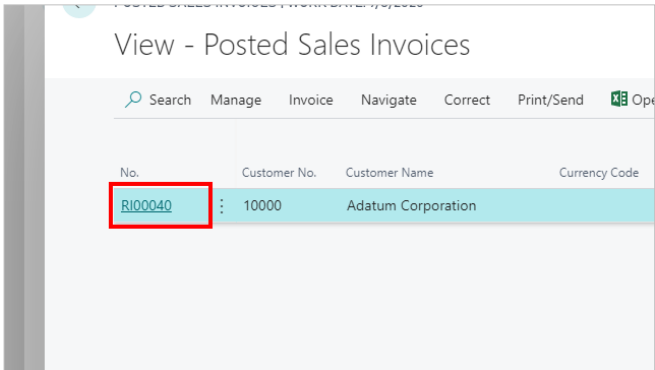
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Posted Invoices**



Click on the link in cell **No.** with the value **RI00040**





ODT Rentals Online Help

Click on the navigation menu item **More options**

00040 - ADATUM CORPORATION | WORK DATE: 9/8/2020

Adatum Corporation

Print/Send Navigate Electronic Document **More options**

Reveal secondary actions

RI00040	Quote No.
Adatum Corporation	Order No.
Robert Townes	Rental Contract No. ...

Click on the navigation menu item popup **Actions**

00040 - ADATUM CORPORATION | WORK DATE: 9/8/2020

Adatum Corporation

Print/Send Navigate Electronic Document **Actions** Navigate Fewer options

RI00040	Quote No.
Adatum Corporation	Order No.
Robert Townes	Rental Contract No. ...

Click on the navigation menu item **Print Rental...**

Business Central

SALES INVOICE - RI00040 - ADATUM CORPORATION | WORK DATE: 9/8/2020

00040 · Adatum Corporation

Print Correct Print/Send Navigate Electronic Document **Actions** Navigate Fewer options

Electronic Document ▾ Send... Print... **Print Rental...** Email Attach as PDF

RI00040	C
Adatum Corporation	C
Robert Townes	F



ODT Rentals Online Help

The following picture demonstrates how the Posted Rental Invoice prints when the Rental Package has Metered Usage pricing and usage has been entered.

CROWNUS Rentals, Inc. 7122 South Ashford Street Westminster Atlanta, GA 31772		RENTAL INVOICE Page: 1	
Invoice Number: R00040		Invoice Date: 7/13/2020	
Bill To:	Ship To:	Customer ID:	10000
Adatum Corporation	Adatum Corporation	P.O. Number:	RC00049
Robert Townes	Robert Townes	Rental Contract No.:	Peter Sadowski
150 Market Square	150 Market Square	SalesPerson:	
GA 31772	GA 31772	Due Date:	8/13/2020
USA	USA	Terms:	1 Month/2% 8 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
Rental Charges:					
R000002 Wacker Skid Steer Package					4,900.00
Rental Jul 07, 2020 to Jul 13, 2020		1 @ 2,500.00 /Weekly Rental = 2,500.00			
Metered Usage					
Level 1 Jul 07, 2020 to Jul 13, 2020		40 @ 40.00 /HOUR = 1,600.00			
Level 2 Jul 07, 2020 to Jul 13, 2020		10 @ 80.00 /HOUR = 800.00			
RU00022-001 Wacker Skid Steer		Serial No: WSS-001			
Daily equipment inspections are mandatory. Inspection checklists must be completed and signed.					
RU00028-001 Wacker Skid - Pallet Fork					
RU00023-003 Ford 150 Trucks		Serial No: 123456789A987654321			
Sales Charges:					
Amount Subject to Sales Tax USD					4,900.00
Amount Exempt from Sales Tax:					0.00
Subtotal:					4,900.00
Total Sales Tax:					98.00
Total USD:					4,998.00

The following demonstrates the return of the package and its' components using the Bulk Returns to populate the Qty. to Return field on the unit lines.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 9/8/2020

Rental Contract · RC00049

Process Contract **Rental** More options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/13/2020

Click on the navigation menu item **Bulk Returns**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 9/8/2020

Rental Contract · RC00049

Process Contract Rental More options

Ship Rentals Return Rentals **Bulk Returns** Invoice Invoice and

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/13/2020



ODT Rentals Online Help

Click on the button **OK**

Location Code
Return Temporary Location
Return Bin Code
Schedule... **OK** Cancel

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central
RENTAL CONTRACT | WORK DATE: 9/8/2020
Rental Contract · RC00049
Process Contract **Rental** More options
General
Sell-to Customer Name Adatum Corporation
Quote No.
Posting Date 7/13/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central
RENTAL CONTRACT | WORK DATE: 9/8/2020
Rental Contract · RC00049
Process Contract Rental More options
Ship Rentals **Return Rentals** Bulk Returns Invoice Inv
Post the return of the rental units on the rental lines. A posted return.
Sell-to Customer Name Adatum Corporation
Quote No.
Posting Date 7/13/2020

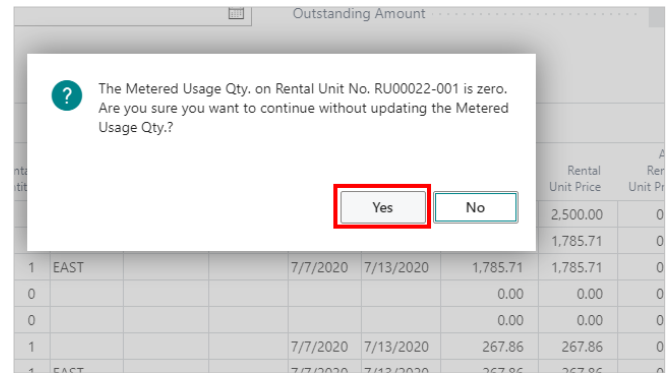
Click on the button **Yes**

Are you sure you want to Return this rental contract?
Yes No

1			7/7/2020	7/13/2020	1,785.71	1,785.71	0		
1	EAST		7/7/2020	7/13/2020	1,785.71	1,785.71	0		
0					0.00	0.00	0		
0					0.00	0.00	0		
1			7/7/2020	7/13/2020	267.86	267.86	0		

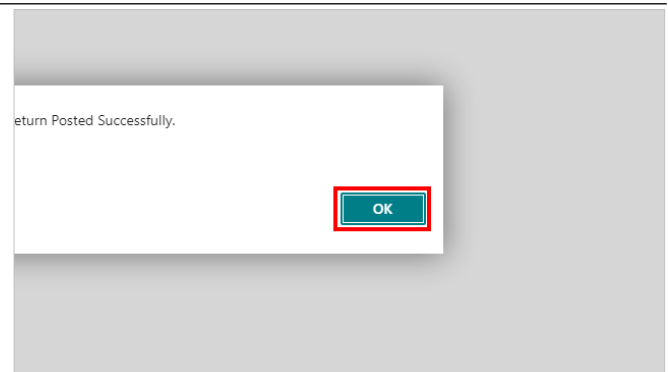
Click on the button **Yes**

The confirmation pop-up message is provided to ensure that usage has been entered. As the contract is fully invoiced and all units are being returned, the contract will close when yes is selected.



							Rental Unit Price	Rental Unit Price
1	EAST		7/7/2020	7/13/2020	1,785.71	1,785.71	0	0
0					0.00	0.00	0	0
0					0.00	0.00	0	0
1			7/7/2020	7/13/2020	267.86	267.86	0	0
1	EAST		7/7/2020	7/13/2020	267.86	267.86	0	0

Click on the button **OK**



4.3.4. Processing Roll-Up Pricing Packages

4.3.4.1. Processing Roll-up Pricing Packages Overview

As some organizations may use both Price Allocation and Roll-up Package, a field, Use Roll-up Pricing, is available to add to the Rental Lines using Personalize.

The Use Roll-up Pricing field provides:

- Visibility as to whether an entered package is based on Roll-up Pricing or Price Allocation.
- The capability to switch a rental package from being a Price Allocation package to a Roll-up Pricing Package and from being a Roll-up Package to a Price Allocation package.

The following points provide important information related to the entry and processing of Roll-up Packages.

Roll-Up Package Price

The Roll-up Package price prints on the rental documents as the sum of the component rental amount lines. The package price is not displayed on the Rental Lines as the price may not be static per rental period.

When printing the quote or contract, the package line, Total Price will be the sum of all the Rental Amount lines, Line Amount Excl. Tax, for all components in the package.

When printing a Proforma Invoice or Posted Rental invoice, the package Total Price will be the sum of all the Rental Amount lines, Line Amount Excl. Tax, for all components which have a Billing Date that is earlier than or the same as the Posting Date on the contract or Bill Until Date, if specified.

The pricing details of the components can be printed on the document by selecting Show Rental Details when printing the documents.

Rental Line Entry

- Whether the Rental Term defaults from the package card, is entered on the package line, or is modified on the package line, then all component lines will have the rental term updated to the same. The Rental Term cannot be modified on the component lines to be different than the package line.



- The Rental Unit Price on the component rental lines, if setup on the group or units' default to the units' rental line. If a group or unit does not have a rental price card setup, then the price can be entered on the component line. The Rental Unit Price on the component lines can be overridden, unless the unit or group was setup on the rental package lines and has the Zero Price field checked.
- The Rental Start Date on component lines defaults from the package line and can be overridden to be later, but not earlier than the package line Rental Start Date. When the Rental Start Date is modified on a component line, the Rental Billing Start Date is not updated as it cannot be different from the package date.
- The Rental Billing Start Date on the component lines is automatically set to the package line Rental Billing Start Date and cannot be modified to a different date.
- The Rental Return Date and Rental Billing End Date on the component lines default from the package line and can be modified to be an earlier date than the package line dates. The dates cannot be later than the dates on the package line.
- Component units can be returned individually on Roll-up Packages.
- Rental Units assigned to a group can be swapped within the package dates.
- Undo Shipment can be ran on individual components within a package.
- Partial shipments and partial returns can be processed on the individual components in a package.

Modifying the Roll-up Package Rental Line Fields

- If the package Rental Start Date is modified, the Rental Billing Start Date is updated to the same date on the package line. When the Rental Start Date is the same on the component unit lines, then the Rental Start Date and Rental Billing Start Date will be updated to be the same as the package line. If the Rental Start Date is different, then only the Rental Billing Start Date will be updated on the component line.

If the Rental Return Date on a Roll-up Package Line is modified a confirmation message occurs. The following is an example of the message.

- Do you want to update the Rental Return Date on the component rental lines for ROLLUP PKG-4? If Yes is selected, then all component lines will be updated. If No is selected, then component line with dates earlier than the Package line dates will not be updated.

If the Rental Billing End Date on a Roll-up Package Line is modified a confirmation message occurs. The following is an example of the message.

- Do you want to update the Rental End Billing Date on the component rental lines? If Yes is selected, then all component lines will be updated. If No is selected, then component line with dates earlier than the Package line date will not be updated.

If component rental units have been returned, the Rental Return Date and/or Rental Billing End Date are not updated, whether Yes or No is selected.

NOTE:

The Package Line Amt. Excl. Tax, which is available to add to the Rental Lines, is not utilized with Roll-up Pricing packages. Should it be added to the Rental Lines, the field is not populated on the Roll-up package rental line as the amount is not static per rental period.

4.3.4.2. How to Process Contracts with Roll-up Pricing Packages

4.3.4.2.1. Overview

The following demonstrates the entry and subsequent processing of a Roll-up Package, which has the components configured on the package card lines.

The package rental will be for 2 months using a monthly prorated Rental Term.



Click on the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' section of the ODT Rentals Online Help interface. The 'Rental Unit No.' field is highlighted with a red box. The interface includes a sidebar with navigation options like 'Open', 'Month', and 'Over Amc'. The main content area has tabs for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Related'. Below the tabs is a table with columns for 'Rental Unit No.', 'Stand... Text Code', and 'Description'. The 'Rental Unit No.' field is currently empty and highlighted with a red box. Below the table is a 'Sales Lines >' link.

Click on the lookup button in the cell **Rental Unit No.**

This screenshot shows the same 'Rental Lines' section as the previous one, but the lookup button (three dots) in the 'Rental Unit No.' field is now highlighted with a red box. A tooltip message 'Review or update the value for Rental Unit No.' is visible below the field. The 'Sales Lines >' link remains at the bottom.

Click on the link in cell **No.** with the value **RP00003**

The screenshot displays the 'Rental Unit List' table. The table has columns for 'No. ↑' and 'Description'. The row with 'RP00003' is highlighted with a red box. The table lists various rental units including 'Mini Excavator with', 'Wacker Skid Steer P', 'Roll-up Package Ter', 'Portable Generators', '16 G Brad Nailer', 'Wacker Hammer Dr', and 'Air Impact Wrench'. The 'Sales Lines >' link is still present at the bottom.

Click on the cell **Rental Terms Code**

This screenshot shows the 'Rental Lines' section with the 'Rental Terms Code' field highlighted by a red box. The table now includes a 'Rental Terms Code' column. The 'Rental Unit No.' field is filled with 'RP00003'. The 'Rental Terms Code' field is currently empty and highlighted. The 'Sales Lines >' link is at the bottom.



Click on the lookup button in the cell **Rental Terms Code**

External Document No.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
→ RP00003	<input type="text"/>	0			

Sales Lines >

Click on the link in cell **Code** with the value **MONTH-PEND-PRO**

→ RP00003

Code	Description
MONTH-PEND	Monthly Rental - Per. Billing
MONTH-PEND EARLY	Monthly Rental - Early Per. B
MONTH-PEND-OPT	Monthly Rental - Per. Optim
MONTH-PEND-PRO	Monthly Rental - Per. Prorat
MONTH-PEND-PRO...	Monthly Rental - Per. Prorat
+ New	

Sales Lines >

Shipping >

Invoice Details

Currency Code Payment Method

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options			
and... xt ode	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Mini Excavator with Sta...	MONTH-P	0			

Enter the text **1**.

Line	Functions	Related	Fewer options			
and... xt ode	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2
	Mini Excavator with Sta...	MONTH-PEN...	<input type="text"/>			

Click on the cell **Rental Unit Price** with the value **0.00**

With Roll-up packages, the Rental Unit Price field on the package line is not populated as the Rental Unit Price can vary per rental period.

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Use Roll-up Pricing	Package Line Unit at Zero Price
→ RP00003	4/12/2021	5/11/2021	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RU00018	4/12/2021	5/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021	5/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021	5/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RU00019	4/12/2021	5/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021	5/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021	5/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

NOTES:

The Use Roll-up Pricing field is checked, indicating that the package is a Roll-up pricing package.

The Package Price is printed on the rental documents and is the sum of the component Rental Amount lines.

The following demonstrates the setting of the Rental Return Date for 2 periods using the No. of Periods field to automatically calculate the Rental Return Date.

Click on the cell **No. of Periods**

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021
			4/12/2021		5/11/2021

Enter the text **2**. Press the **TAB** key.

Contract Total			2,137.10				
Outstanding Amount			2,137.10				
Advanced Proforma			<input type="checkbox"/>				
ms	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Periods	Rental Return Date
PEN...	1				4/12/2021		5/11/2021
PEN...	2				4/12/2021		
PEN...	1				4/12/2021		

When the Rental Return Date on the package line is modified the following confirmation message occurs.

When changing the return date on the initial entry of the package, the selection should be Yes.

Click on the button **Yes**

<p>Do you want to update the Rental Return Date on the component rental lines for RP00003? If Yes is selected, then all component lines will be updated. If No is selected, then component line with dates earlier than the Package line dates will not be updated. If there are any component line dates which are later than the package line dates, these components will be updated.</p> <p><input checked="" type="button" value="Yes"/> <input type="button" value="No"/></p>							
2					4/12/2021	5/11/2021	4/12/2021
1					4/12/2021	5/11/2021	4/12/2021
1					4/12/2021	5/11/2021	4/12/2021
2					4/12/2021	5/11/2021	4/12/2021
1					4/12/2021	5/11/2021	4/12/2021



Click on the cell **Rental Return Date** with the value **6/11/2021**

After moving off the package rental line the component lines, Rental Return Date will be updated to the date on the package rental line.

External Document No. -							
Rental Lines	Manage	Line	Functions	Related	Fewer options		
Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	
→ RP00003	4/12/2021		6/11/2021	4/12/2021	6/11/2021	0.0	
RU00018	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0	
RU00018-001	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0	
RU00018-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0	
RU00019	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0	
RU00019-001	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0	
RU00019-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0	

Click on the cell **Rental Unit No.**

Rental Lines					Manage	Line	Functions
Rental Unit No.					Rental Quantity	Location Code	Rental Terms Code
→ RP00003					1		
RU00018					2		
					1		
RU00019					2		
					1		
					1		

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines					Manage	Line	Functions	Related	F
Rental Unit No.					Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code	
RP00003					1				
RU00018					2				
→					1				
					1				
RU00019					2				
					1				
					1				

Multiple units can be selected at one time to populate the child units using the following steps.

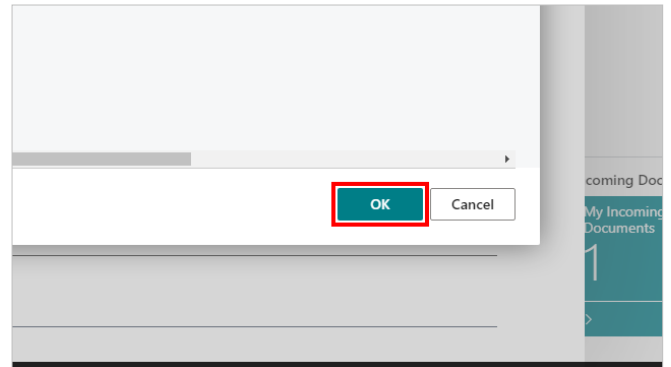
Alternatively, the Show Move can be used to select multiple units.

Press and hold the **Shift** key down.

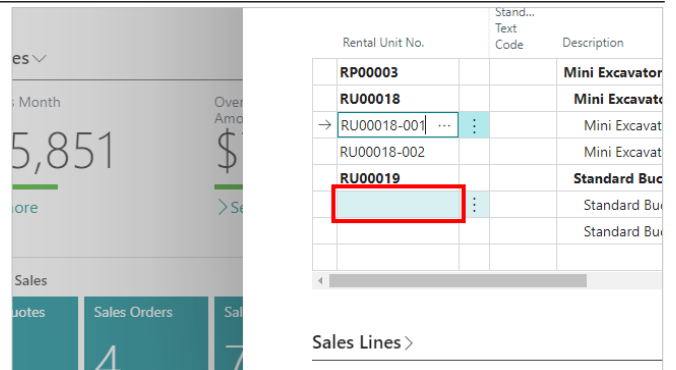
Click on **No. = RU00018-002, Description = Mini Excavator, Group = 0**

Want to learn more about our business Cent		Rental Unit List	
		Search	Rental
		Related	Fewer options
		No. ↑	Description
		→ RU00018-001	Mini Excavator
		RU00018-002	Mini Excavator
		RU00018-003	Mini Excavator
		RU00018-004	Mini Excavator
		RU00018-005	Mini Excavator

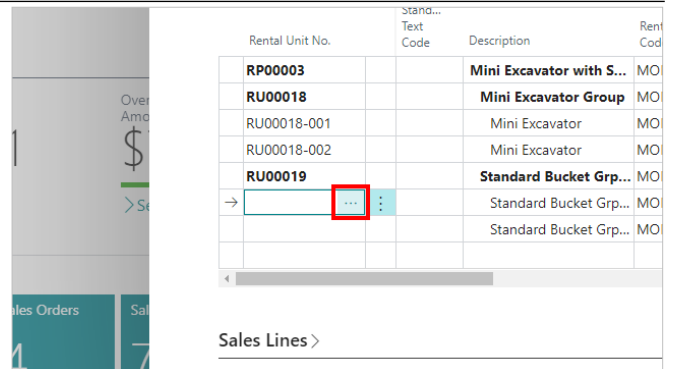
Click on the button **OK**



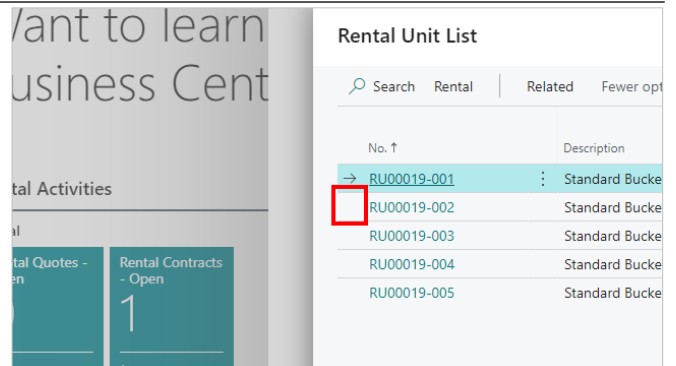
Click on the cell **Rental Unit No.**



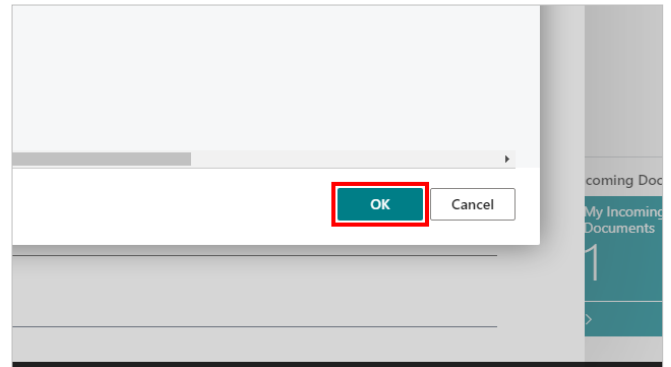
Click on the lookup button in the cell **Rental Unit No.**



Press and hold the **Shift** key down.
Click on **No. = RU00019-002, Description =
Standard Bucket for Mini Excavator, Group = 0**



Click on the button **OK**



4.3.4.2.2. Modifying the Rental Start and Return Dates on Components

The following demonstrates the changing of the Rental Start Date on one component unit to be later than the package line Rental Start Date.

Click on the cell **Rental Start Date** with the value **4/12/2021**

Rental Lines | Manage | Line | Functions | Related | Fewer options							
Rental Unit No.	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	
→ RP00003	1		4/12/2021		6/11/2021	4/12/2021	
RU00018	2		4/12/2021		6/11/2021	4/12/2021	
RU00018-001	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00018-002	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00019	2		4/12/2021		6/11/2021	4/12/2021	
RU00019-001	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00019-002	1	EAST	4/12/2021		6/11/2021	4/12/2021	

Click on the link in cell **Rental Start Date** with the value **4/12/2021**

Rental Lines | Manage | Line | Functions | Related | Fewer options							
Rental Unit No.	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	
RP00003	1		4/12/2021		6/11/2021	4/12/2021	
RU00018	2		4/12/2021		6/11/2021	4/12/2021	
→ RU00018-001	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00018-002	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00019	2		4/12/2021		6/11/2021	4/12/2021	
RU00019-001	1	EAST	4/12/2021		6/11/2021	4/12/2021	
RU00019-002	1	EAST	4/12/2021		6/11/2021	4/12/2021	

Click on a date in the calendar

	1		4/12/2021		6/11/2021	4/12/2021	6/11/2021	
	2		4/12/2021		6/11/2021	4/12/2021	6/11/2021	90
	1	EAST	4/12/2021		6/11/2021	4/12/2021	6/11/2021	90
	2					4/12/2021	6/11/2021	18
	1	EAST				4/12/2021	6/11/2021	18
	1	EAST				4/12/2021	6/11/2021	18

April 2021

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Go to today Done



ODT Rentals Online Help

Click on the cell **Rental Billing Start Date** with the value **4/12/2021**

The Rental Billing Start Date is not updated on entry as it cannot be different than the Rental Start Date on the package line.

Line	Functions	Related	Fewer options				
Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	
	4/12/2021		6/11/2021	4/12/2021	6/11/2021	0.00	
	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00	
EAST	4/15/2021		6/11/2021	4/12/2021	6/11/2021	900.00	
EAST	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00	
	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	
EAST	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	
EAST	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	

The following demonstrates the modifying of the Rental Return Date on a component unit and the resulting updating of the Rental Billing End Date.

Click on the cell **Rental Return Date** with the value **6/11/2021**

Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
RP00003	4/12/2021		6/11/2021	4/12/2021	6/11/2021	0.0
RU00018	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0
→ RU00018-001	4/15/2021		6/11/2021	4/12/2021	6/11/2021	900.0
RU00018-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0
RU00019	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0
→ RU00019-001	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0
RU00019-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0

Sales Lines >

Click on the link in cell **Rental Return Date** with the value **6/11/2021**

Rental Unit No.	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
RP00003	4/12/2021		6/11/2021	4/12/2021	6/11/2021	0.0
RU00018	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0
RU00018-001	4/15/2021		6/11/2021	4/12/2021	6/11/2021	900.0
RU00018-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.0
RU00019	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0
→ RU00019-001	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0
RU00019-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.0

Sales Lines >

Click on the link **Previous**

No.	Date	Periods	Return Date	Date	Date	Price
RP00003	4/12/2021		6/11/2021	4/12/2021	6/11/2021	0.00
RU00018	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00
RU00018-001	4/15/2021		6/11/2021	4/12/2021	6/11/2021	900.00
RU00018-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00
RU00019	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00
→ RU00019-001	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00
RU00019-002	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00

Sales Lines >

June 2021

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			



ODT Rentals Online Help

Click on a date in the calendar

	4/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
⋮	4/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	4/12/2021					180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

May 2021

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Go to today Done

Click on the cell **Rental Billing End Date** with the value **5/20/2021**

Note that the Rental Billing End Date is updated to the same date as the Rental Return Date that was entered.

Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Use Roll-up Pricing	Line Unit at Zero Price
/12/2021		6/11/2021	4/12/2021	6/11/2021	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/15/2021		6/11/2021	4/12/2021	6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/12/2021		6/11/2021	4/12/2021	6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/12/2021		6/11/2021	4/12/2021	6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/12/2021		5/20/2021	4/12/2021	5/20/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/12/2021		6/11/2021	4/12/2021	6/11/2021	Type the date in the format M/d/yyyy		

The Rental Billing End Date can be modified, if required. The date can be any date that is equal to, or earlier than the Rental Billing End Date on the package line.

The following picture displays the Rental Contract report with Show Details enable, which results in the printing of the Roll-up Package Total Price, and the pricing details of the component units.

The total of the components' Line Amount Excl. Tax in the Rental Amount Lines is the amount that prints in the Total Price column on the line for the Roll-up Package.

**Rental Contract**

Page: 1

Rental Contract Number: RC00018

Rental Contract Date: 4/12/2021

Sell

To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236

Ship

To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236

P.O. Number

Customer ID 20000

SalesPerson Jim Olive

Ship Via

Ship Method

Terms Net 14 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RP00003	Mini Excavator with Standard Bucket		1		4,192.26
RU00018	Mini Excavator Group		2		
RU00018-001	Mini Excavator	ME-001	1		
Rental	Apr 12, 2021 to Jun 11, 2021		2 @ 900.00/ Monthly Rental = 1,800.00		
RU00018-002	Mini Excavator	ME-002	1		
Rental	Apr 12, 2021 to Jun 11, 2021		2 @ 900.00/ Monthly Rental = 1,800.00		
RU00019	Standard Bucket Grp for Mini Excavator		2		
RU00019-001	Standard Bucket for Mini Excavator	SB-ME-001	1		
Rental	Apr 12, 2021 to May 20, 2021		1,29032 @ 180.00/ Monthly Rental = 232.26		
RU00019-002	Standard Bucket for Mini Excavator	SB-ME-002	1		
Rental	Apr 12, 2021 to Jun 11, 2021		2 @ 180.00/ Monthly Rental = 360.00		

Amount Subject to Sales Tax USD 4,192.26

Amount Exempt from Sales Tax USD 0.00

Subtotal: 4,192.26

Total Sales Tax: 83.85

Total USD: 4,276.11**4.3.4.2.2.3. Shipping the Roll-up Package Component Units**

With Roll-up packages, the component Rental Units can be shipped on the same date or individually on varying dates.



In this example, all the Rental Units except RU00018-001 have a Rental Start Date of April 12. RU00018-001 has a Rental Start Date of April 15.

Therefore, all units except RU00018-001 will be shipped on April 12. RU00018-001 will be shipped on April 15.

Click on the field **Posting Date**

Ensure the Posting Date is set to the date that the units are being shipped on.

The following demonstrates the clearing of the Qty. to Rent on the unit, RU00018-001, as it will not be shipped until April 15.

Click on the cell **Rental Unit No.** with the value **RU00018-001**

Rental Unit No.	Rental Billing Start Date	Rental Billing End Date
RP00003	4/12/2021	6/11/2021
RU00018	4/12/2021	6/11/2021
RU00018-001	4/12/2021	6/11/2021
RU00018-002	4/12/2021	6/11/2021
RU00019	4/12/2021	6/11/2021
RU00019-001	4/12/2021	5/20/2021
RU00019-002	4/12/2021	6/11/2021

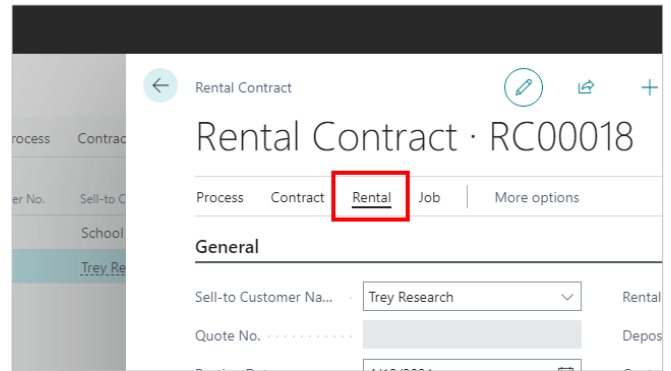
Click on the cell **Qty. to Rent** with the value **1**

Rental Billing End Date	Rental Unit Price	Use Roll-up Pricing	Package Line Unit at Zero Price	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned
6/11/2021	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
5/20/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C
6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C

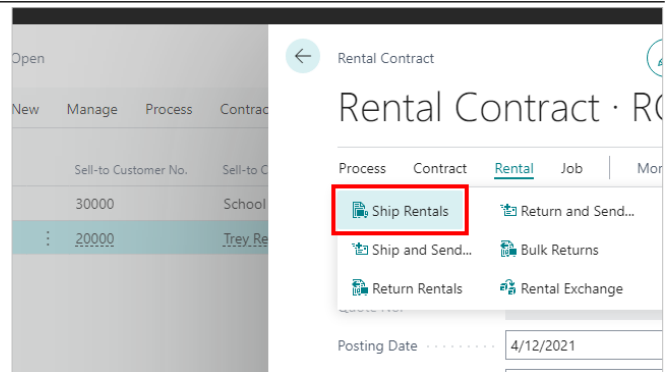
Enter the text **0**.

Rental Billing End Date	Rental Unit Price	Use Roll-up Pricing	Package Line Unit at Zero Price	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned
6/11/2021	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
6/11/2021	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C
6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	C
5/20/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C
6/11/2021	180.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	0	0	C

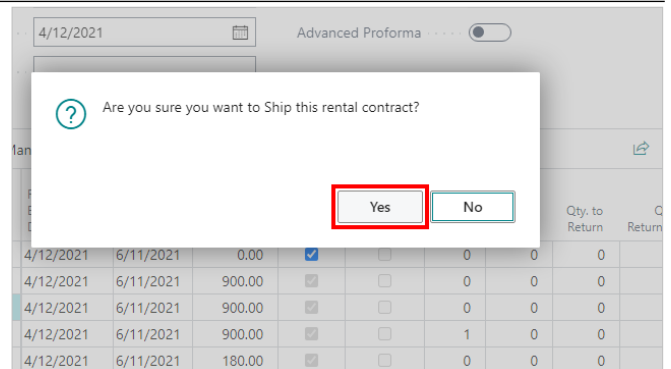
Click on the navigation menu item popup **Rental**



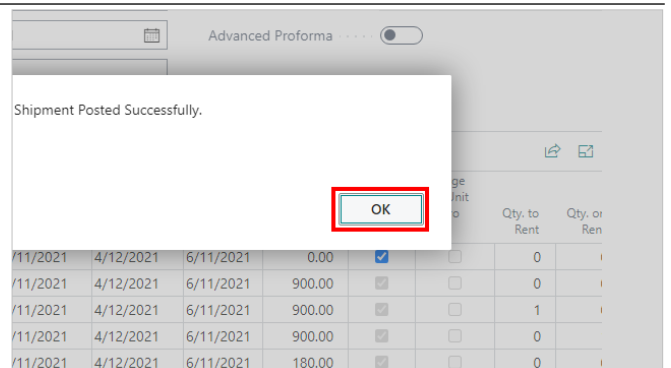
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



The following steps are the shipping of unit, RU00018-001, on April 15.



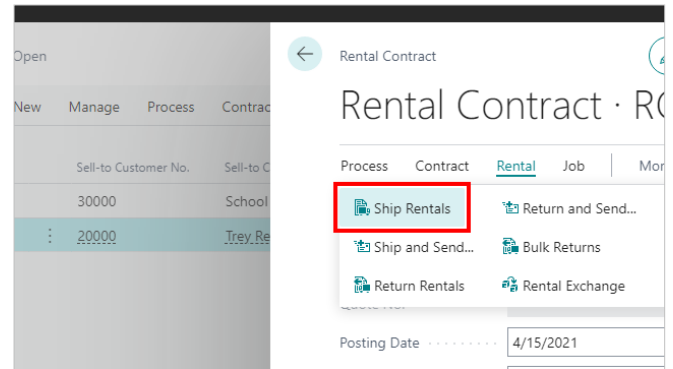
Click on the field **Posting Date**

Click on the link **Open the date picker for Posting Date**

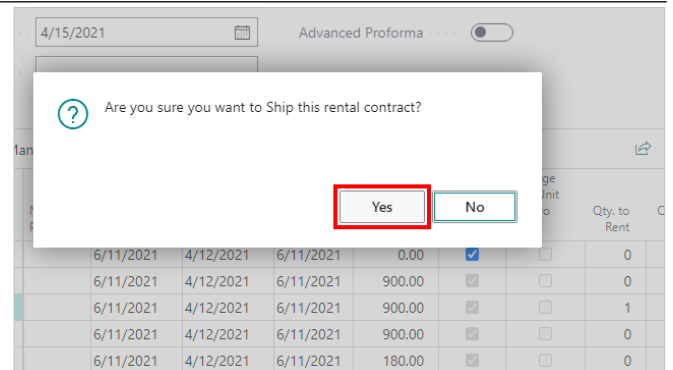
Click on a date in the calendar

Click on the navigation menu item popup **Rental**

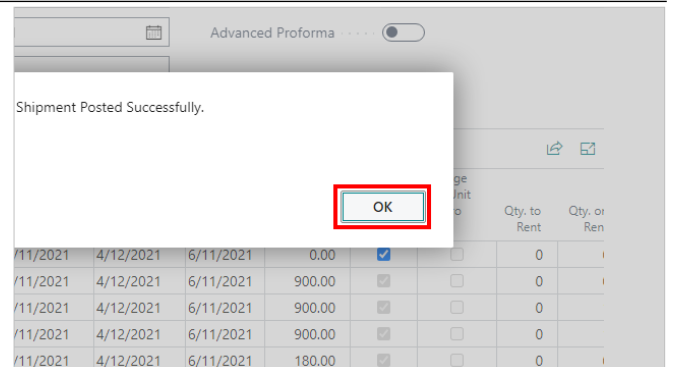
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



4.3.4.2.2.4. Invoicing the Roll-up Package

When invoicing a contract with a Roll-up Package, the determination of which components will be included in the invoice is dependant on:

- The Posting Date, and if applicable, the Bill Until Date entered on the General tab of the contract.
- The Billing Date on the components Rental Amount Lines. All component units with a Billing Date, which has not been invoiced, equal to or earlier than the Posting Date, or if applicable, the Bill Until Date will be included in the invoice.

The following picture displays the Rental Amount Lines for each of the component units.

Rental Contract - Component Units Rental Amount Lines

RU00018-001

Type †	Starting Date-Time †	Ending Date-Time †	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date †
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	900.00	900.00		918.00	SUPPLIES	5/11/2021
Rental	5/12/2021 12:00 AM	6/11/2021 11:59 PM	1	900.00	900.00		918.00	SUPPLIES	6/11/2021

RU00018-002

Type †	Starting Date-Time †	Ending Date-Time †	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date †
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	900.00	900.00		918.00	SUPPLIES	5/11/2021
Rental	5/12/2021 12:00 AM	6/11/2021 11:59 PM	1	900.00	900.00		918.00	SUPPLIES	6/11/2021

RU00019-001

Type †	Starting Date-Time †	Ending Date-Time †	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date †
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	180.00	180.00		183.60	SUPPLIES	5/11/2021
Rental	5/12/2021 12:00 AM	5/20/2021 11:59 PM	0.29032	180.00	52.26		53.31	SUPPLIES	5/20/2021

RU00019-002

Type †	Starting Date-Time †	Ending Date-Time †	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Currency Code	Amount Including Tax	Tax Group Code	Billing Date †
Rental	4/12/2021 12:00 AM	5/11/2021 11:59 PM	1	180.00	180.00		183.60	SUPPLIES	5/11/2021
Rental	5/12/2021 12:00 AM	6/11/2021 11:59 PM	1	180.00	180.00		183.60	SUPPLIES	6/11/2021

When invoicing the first rental period on May 11, the Rental Package Total Price (Excl. Tax) will be calculated as the sum of the component units, Rental Amount Lines, with a Billing Date equal to or earlier than May 11. Therefore, the invoice will be calculated as 900.00 + 900.00 + 180.00 + 180.00 = 2,160.00.

As the component unit, RU00019-001 with an earlier return date, has a Rental Amount Line with a Billing Date of May 20, an invoice could be posted on May 20. However, the invoice would contain only that unit in the invoice. Resulting in the package line Total Price being 52.26.

When invoicing the contract for the second full rental period on June 11, the Rental Package Total Price (Excl. Tax) will be calculated as the sum of the component units, Rental Amount Lines, which have not been invoiced, with a Billing Date equal to or earlier than June 11.

Therefore, the invoice will be calculated as 900.00 + 900.00 + 52.26 + 180.00 = 2,032.26.

The following demonstrates the posting of the invoice for the first rental period.

Click on the field **Posting Date**

Process	Contract	Rental	Job	More options
<div> <div>Sell-to C</div> <div>School</div> <div>Trey Re</div> </div>				
<div> <div>General</div> <div> <div>Sell-to Customer Na...</div> <div>Trey Research</div> <div>Rental Terr</div> </div> <div> <div>Quote No.</div> <div></div> <div>Deposit Ar</div> </div> <div> <div>Posting Date</div> <div>4/15/2021</div> <div>Contract T</div> </div> <div> <div>Order Date</div> <div>4/12/2021</div> <div>Type the date in the format M/d/yyyy</div> </div> <div> <div>Document Date</div> <div>4/15/2021</div> <div>Advanced</div> </div> <div> <div>External Document No. .</div> <div></div> </div> </div>				




Click on the link **Open the date picker for Posting Date**


Process Contract Rental Job More options


General

Customer Name: Trey Research Rental Terms Code:

Quote No.: Deposit Amount:

Posting Date: 4/15/2021  Contract Total:

Order Date: 4/12/2021  Outstanding Amount:

Document Date: 4/15/2021  Advanced Proforma: ☒


External Document No.:

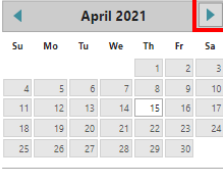
Click on the link **Next**

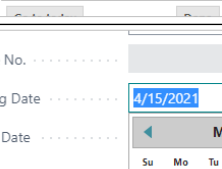
General

Customer Name: Trey Research Rental Terms Code:

Quote No.: Deposit Amount:

Posting Date: 4/15/2021  Contract Total:

Order Date:  Outstanding Amount:


Document Date:  Advanced Proforma: ☒

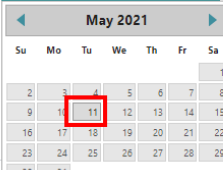
External Document No.:

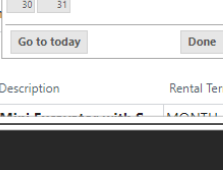
Rental Lines Management Fewer options

Click on a date in the calendar

Quote No.: Deposit Amount:

Posting Date: 4/15/2021  Contract Total:

Order Date:  Outstanding Amount:

Document Date:  Advanced Proforma: ☐

External Document No.:

Rental Lines Management Fewer options

Go to today Done

Rental Unit No. Description Rental Terms Code Rental Quantity Location Code

Click on the navigation menu item popup **Rental**

Rental Contract

Rental Contract · RC00018

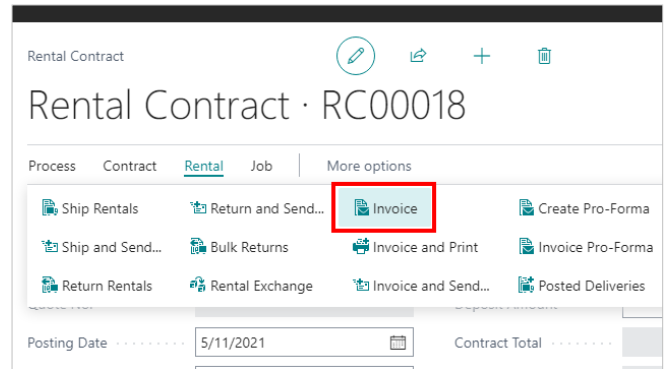
Process Contract **Rental** Job More options

General

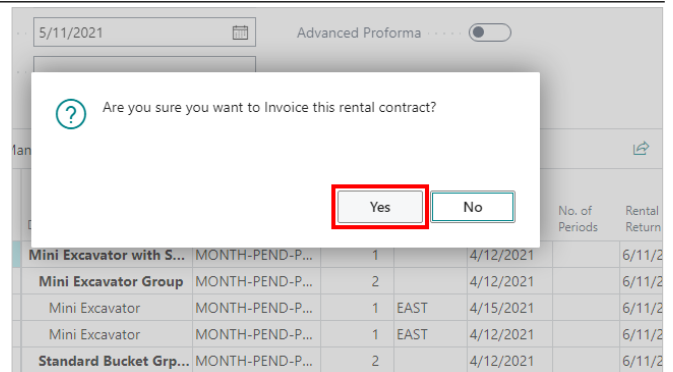
Sell-to Customer Name: Trey Research Rental

Quote No.: Depos

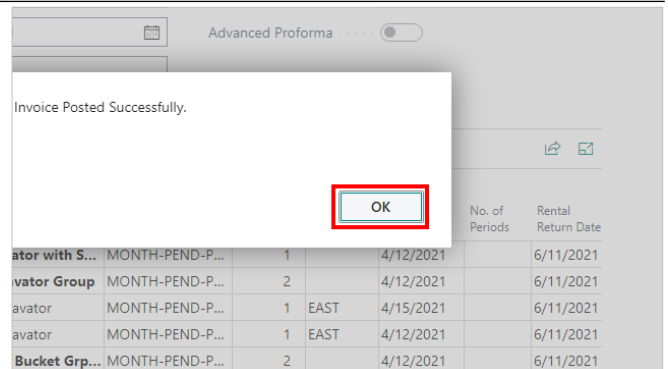
Click on the navigation menu item **Invoice**



Click on the button **Yes**



Click on the button **OK**



The following picture displays the Posted Rental Invoice, when Show Rental Details is enabled.



CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

RENTAL INVOICE

Page: 1

Invoice Number: RI00006
Invoice Date: 5/11/2021

Bill To:
Trey Research
Helen Ray
153 Thomas Drive
JL 61236
USA

Ship To:
Trey Research
Helen Ray
153 Thomas Drive
JL 61236
USA

Customer ID: 20000
P.O. Number:
Rental Contract No. RC00018
SalesPerson: Jim Olive
Due Date: 5/25/2021
Terms: Net 14 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
------------------	------	-----------	----------	------------	-------------

Rental Charges:

RP00003 Mini Excavator with Standard Bucket					2,160.00
RU00018-001 Mini Excavator			Serial No.: ME-001		
Rental Apr 12, 2021 to May 11, 2021			1 @ 900.00 / Monthly Rental = 900.00		
RU00018-002 Mini Excavator			Serial No.: ME-002		
Rental Apr 12, 2021 to May 11, 2021			1 @ 900.00 / Monthly Rental = 900.00		
RU00019-001 Standard Bucket for Mini Excavator			Serial No.: SB-ME-001		
Rental Apr 12, 2021 to May 11, 2021			1 @ 180.00 / Monthly Rental = 180.00		
RU00019-002 Standard Bucket for Mini Excavator			Serial No.: SB-ME-002		
Rental Apr 12, 2021 to May 11, 2021			1 @ 180.00 / Monthly Rental = 180.00		

Sales Charges:

Amount Subject to Sales Tax USD	2,160.00	Subtotal:	2,160.00
Amount Exempt from Sales Tax	0.00		
		Total Sales Tax:	43.20
		Total USD:	2,203.20

The following demonstrates the return of the component unit, RU00019-001, on May 20, then the invoicing of



ODT Rentals Online Help

the contract for the second rental period.

Click on the field **Posting Date**

Process Contract Rental Job More options

General

Sell-to Customer Na... Trey Research Rental Term

Quote No. Deposit Ar

Posting Date 5/11/2021 Contract T

Order Date 4/12/2021 Outstandin

Document Date 5/11/2021 Advanced

External Document No. ..

Click on the link **Open the date picker for Posting Date**

Process Contract Rental Job More options

General

to Customer Na... Trey Research Rental Terms Code

e No. Deposit Amount

ng Date 5/11/2021 Contract Total

r Date 4/12/2021 Outstanding Amount ...

iment Date 5/11/2021 Advanced Proforma ...

nal Document No. ..

Click on a date in the calendar

Quote No. Deposit Amount

Posting Date 5/11/2021 Contract Total

Order Date Outstanding Amount ...

Document Date Advanced Proforma ...

External Document No. ..

Rental Lines | Man

Rental Unit No. Description Rental Terms Code Rental Quantity Location Code Rev

→ RP00003 Mini Excavator with S... MONTH-PEND-P... 1 4/1

Click on the cell **Rental Unit No.** with the value **RU00019-001**

Rental Unit No. Rental Unit Price Use Roll-up Pricing Line U at Zer Price

→ RP00003 0.00 [X]

RU00018 900.00 [X]

RU00018-001 900.00 [X]

RU00018-002 900.00 [X]

RU00019 180.00 [X]

RU00019-001 180.00 [X]

RU00019-001 180.00 [X]

Sales Lines >



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

al Unit Price	Use Roll-up Pricing	Line Unit at Zero Price	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Curre...	Tax Group Code
0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES

Enter the text **1**.

al Unit Price	Use Roll-up Pricing	Line Unit at Zero Price	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Curre...	Tax Group Code
0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
00.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES
80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	1	0	0		SUPPLIES

Click on the navigation menu item popup **Rental**

Rental Contract

Rental Contract · RC00018

Process Contract **Rental** Job More options

General

Sell-to Customer Na... Trey Research Rental

Quote No. Depos

Click on the navigation menu item **Return Rentals**

New Manage Process Contract

Sell-to Customer No. Sell-to C

30000 School

20000 Trey Re

Rental Contract · RC

Process Contract **Rental** Job Mor

Ship Rentals Return and Send...

Ship and Send... Bulk Returns

Return Rentals Rental Exchange

Posting Date 5/20/2021

Order Date 4/12/2021

Document Date 5/20/2021



Click on the button **Yes**

Are you sure you want to Return this rental contract?

Yes No

Click on the button **OK**

Return Posted Successfully.

OK

Click on the field **Posting Date**

Process Contract Rental Job More options

General

Sell-to Customer Na... Trey Research Rental Terr...

Quote No. ...

Posting Date 5/20/2021 Deposit Ar...

Order Date 4/12/2021 Contract T...

Document Date 5/20/2021 Outstandi...

External Document No. ... Advanced

Click on the link **Open the date picker for Posting Date**

ess Contract Rental Job More options

eral

o Customer Na... Trey Research Rental Terms Code ...

e No. ... Deposit Amount ...

ng Date 5/20/2021 Contract Total ...

r Date 4/12/2021 Outstandi...

ment Date 5/20/2021 Advanced Proforma ...

nal Document No. ...

Open the date picker for Posting Date



Click on the link **Next**

The screenshot shows a form with various fields. The 'Next' button is highlighted in red. The form includes fields for Customer Name (Trey Research), Rental Terms Code, Deposit Amount, Contract Total, Outstanding Amount, and Advanced Proforma. A calendar is visible, showing May 2021, with the date 5/20/2021 selected.

Click on a date in the calendar

The screenshot shows the same form as before, but with the calendar expanded to show June 2021. The date 6/11/2021 is highlighted in red. The form includes fields for Customer Name (Trey Research), Rental Terms Code, Deposit Amount, Contract Total, Outstanding Amount, and Advanced Proforma. A calendar is visible, showing June 2021, with the date 6/11/2021 selected.

Click on the navigation menu item popup **Rental**

The screenshot shows a navigation menu with the 'Rental' item highlighted in red. The menu includes options for Process, Contract, Rental, Job, and More options. The 'Rental' item is highlighted in red.

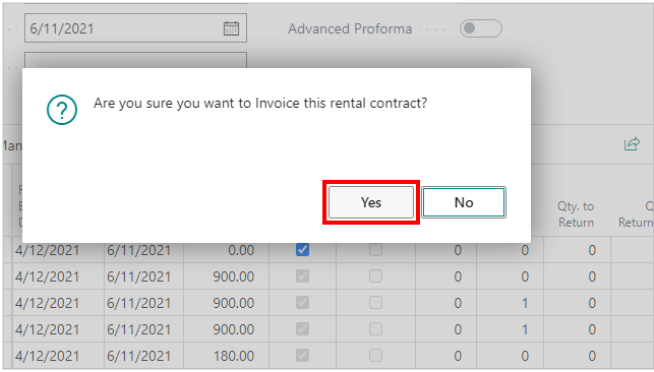
Click on the navigation menu item **Invoice**

The screenshot shows a navigation menu with the 'Invoice' item highlighted in red. The menu includes options for Ship Rentals, Return and Send..., Invoice, Create Pro-Forma, Ship and Send..., Bulk Returns, Invoice and Print, Invoice Pro-Forma, Return Rentals, Rental Exchange, Invoice and Send..., and Posted Deliveries. The 'Invoice' item is highlighted in red.

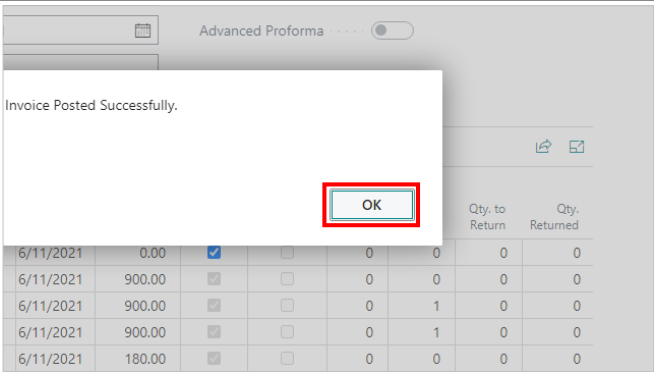


ODT Rentals Online Help

Click on the button **Yes**



Click on the button **OK**



The following picture displays the posted rental invoice for the second rental period.



CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

RENTAL INVOICE

Page: 1

Invoice Number: RI00007

Invoice Date: 6/11/2021

Bill

To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236
USA

Ship

To: Trey Research
Helen Ray
153 Thomas Drive
IL 61236
USA

Customer ID 20000

P.O. Number

Rental Contract No. RC00018

SalesPerson Jim Olive

Due Date 6/25/2021

Terms Net 14 days

Item/Description	Unit	Order Qty	Quantity	Unit Price	Total Price
------------------	------	-----------	----------	------------	-------------

Rental Charges:

RP00003 Mini Excavator with Standard Bucket					2,032.26
---	--	--	--	--	----------

RU00018-001 Mini Excavator

Serial No.: ME-001

Rental May 12, 2021 to Jun 11, 2021

1 @ 900.00 / Monthly Rental = 900.00

RU00018-002 Mini Excavator

Serial No.: ME-002

Rental May 12, 2021 to Jun 11, 2021

1 @ 900.00 / Monthly Rental = 900.00

RU00019-001 Standard Bucket for Mini Excavator

Serial No.: SB-ME-001

Rental May 12, 2021 to May 20, 2021

0.2903 @ 180.00 / Monthly Rental = 52.26

RU00019-002 Standard Bucket for Mini Excavator

Serial No.: SB-ME-002

Rental May 12, 2021 to Jun 11, 2021

1 @ 180.00 / Monthly Rental = 180.00

Sales Charges:

Amount Subject to Sales Tax USD	2,032.26	Subtotal:	2,032.26
---------------------------------	----------	------------------	-----------------

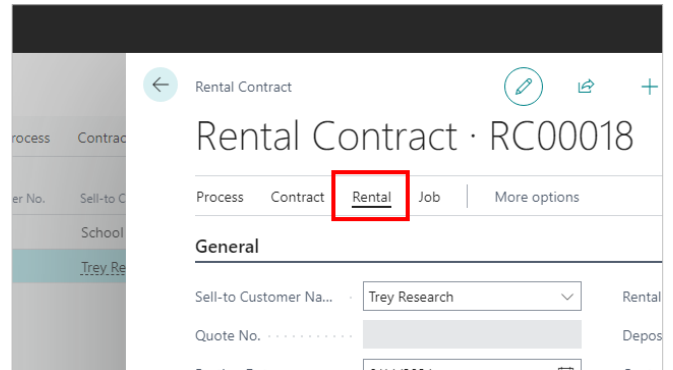
Amount Exempt from Sales Tax 0.00

Total Sales Tax 40.65

Total USD: 2,072.91

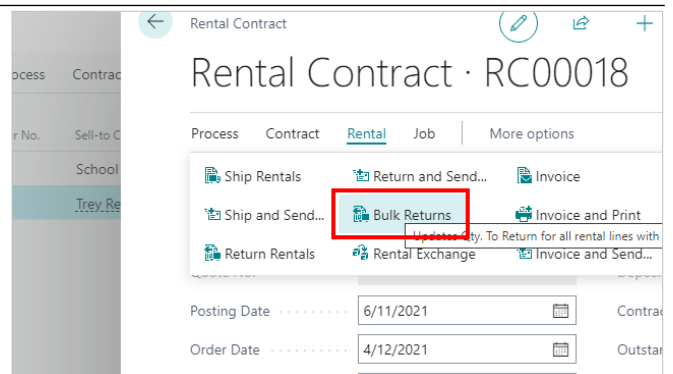
To complete the contract the remaining component units will be returned utilizing the Bulk Returns and posting the return.

Click on the navigation menu item popup **Rental**



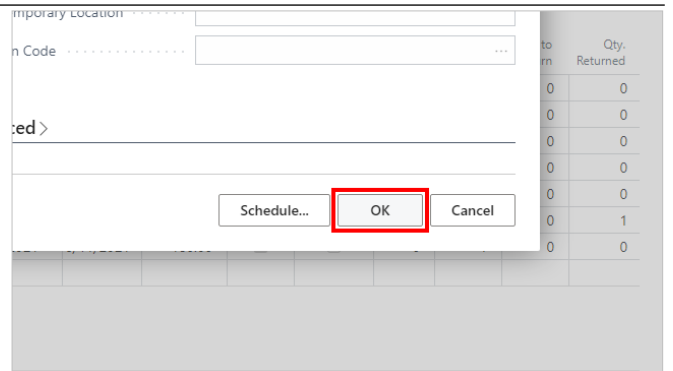
The screenshot shows the 'Rental Contract' screen for contract RC00018. The 'Rental' tab is highlighted in the top navigation bar. The 'General' section is visible, showing 'Sell-to Customer Na...' as 'Trey Research' and 'Quote No.' as an empty field.

Click on the navigation menu item **Bulk Returns**



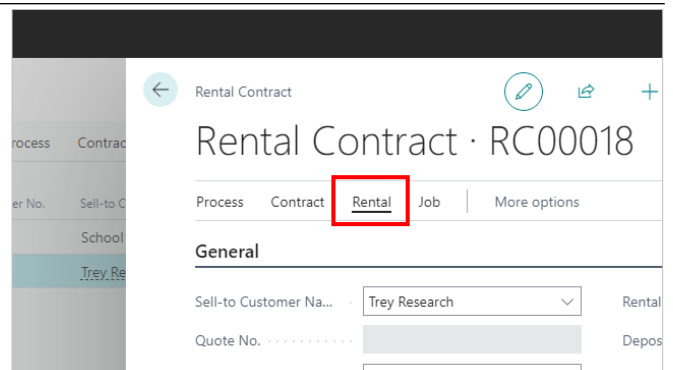
The screenshot shows the 'Rental Contract' screen for contract RC00018. The 'Bulk Returns' option is highlighted in the 'Rental' tab. The 'Posting Date' is 6/11/2021 and the 'Order Date' is 4/12/2021.

Click on the button **OK**



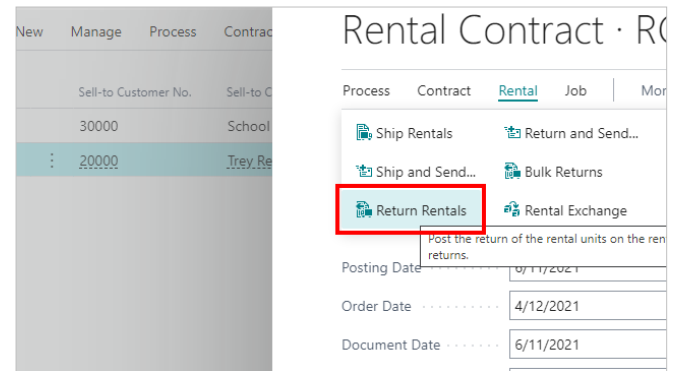
The screenshot shows the 'Rental Contract' screen for contract RC00018. The 'OK' button is highlighted in the bottom right corner. The 'Schedule...' button is also visible.

Click on the navigation menu item popup **Rental**

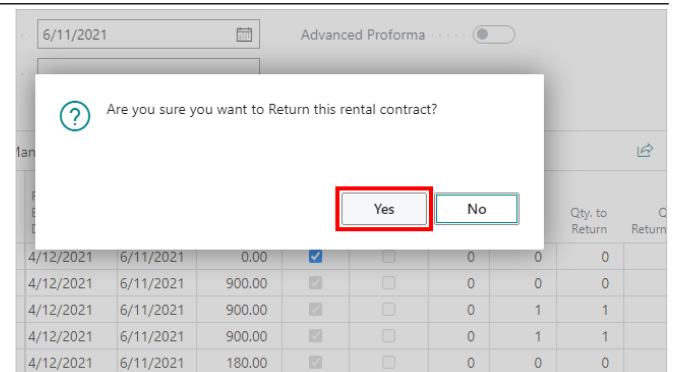


The screenshot shows the 'Rental Contract' screen for contract RC00018. The 'Rental' tab is highlighted in the top navigation bar. The 'General' section is visible, showing 'Sell-to Customer Na...' as 'Trey Research' and 'Quote No.' as an empty field.

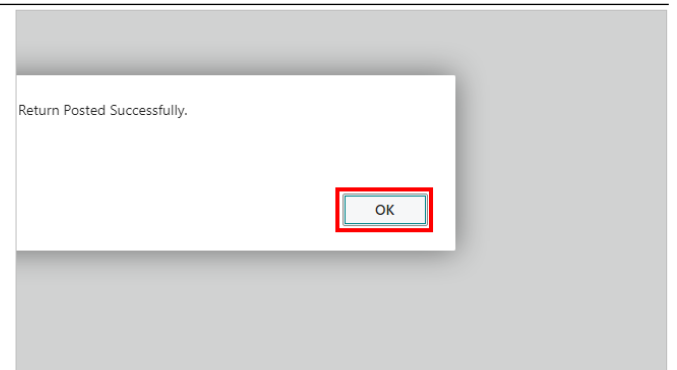
Click on the navigation menu item **Return Rentals**



Click on the button **Yes**



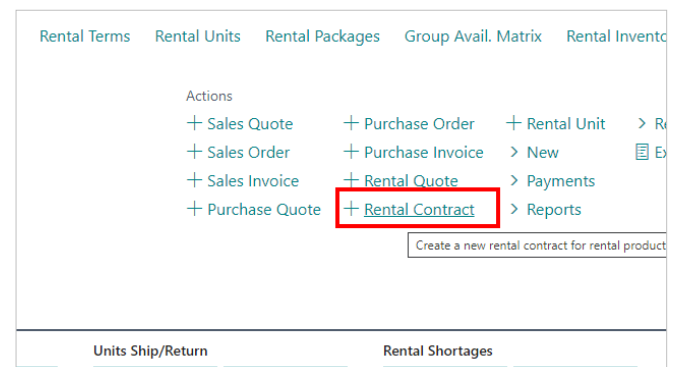
Click on the button **OK**



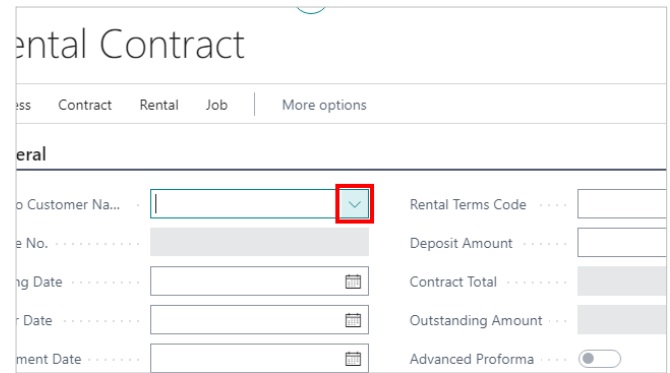
4.3.4.2.3.

How to Enter Rental Lines When Using a Package Template

Click on the navigation menu item **Rental Contract**



Click on the lookup button **Sell-to Customer Name**



Rental Contract

Contract Rental Job More options

General

Sell-to Customer Na... [lookup button]

Rental Terms Code

Quote No.

Posting Date

Order Date

Document Date

External Document No.

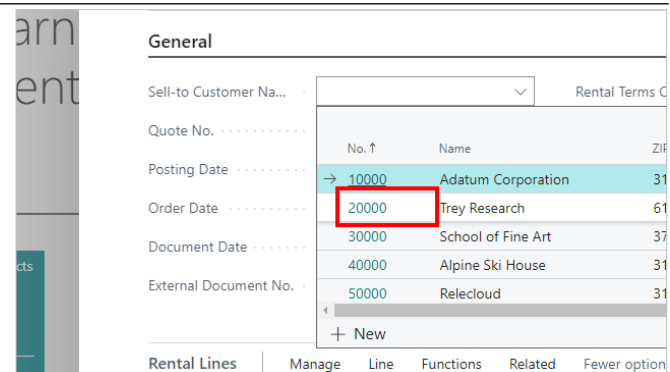
Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Click on the link in cell **No.** with the value **20000**



General

Sell-to Customer Na... [dropdown menu]

Quote No.

Posting Date

Order Date

Document Date

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

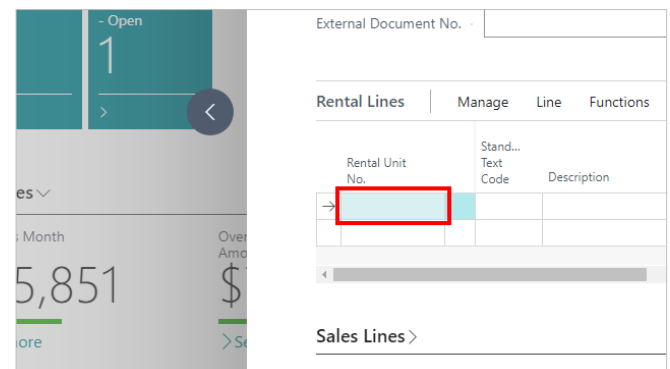
No.	Name	Zip
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

+ New

Rental Lines Manage Line Functions Related Fewer options

4.3.4.2.3.1. Rental Line Entry Using a Roll-up Package Template

Click on the cell **Rental Unit No.**



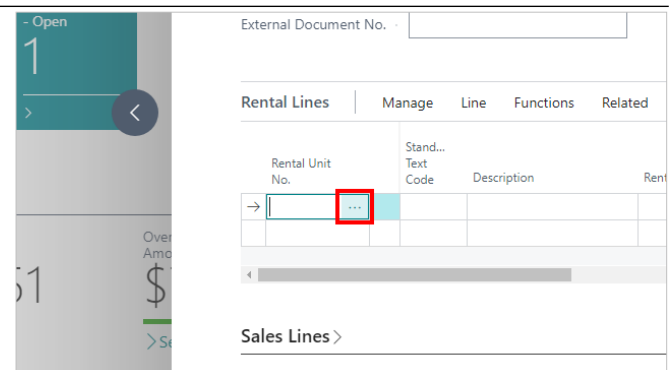
External Document No.

Rental Lines Manage Line Functions

Rental Unit No.	Stand... Text Code	Description
[lookup button]		

Sales Lines >

Click on the lookup button in the cell **Rental Unit No.**



External Document No.

Rental Lines Manage Line Functions Related

Rental Unit No.	Stand... Text Code	Description	Rent
[lookup button]			

Sales Lines >



Click on the link in cell **No.** with the value **RP00004**

No. ↑	Description	Gro... ↑	Group No. ↑
RP00001	Mini Excavator with Vibrator Pl...	<input type="checkbox"/>	
RP00002	Wacker Skid Steer Package	<input type="checkbox"/>	
RP00003	Mini Excavator with Standard B...	<input type="checkbox"/>	
RP00004	Roll-up Package Template	<input type="checkbox"/>	
→ PG-001	Portable Generators	<input type="checkbox"/>	
RU00007	16 G Brad Nailer	<input type="checkbox"/>	
RU00026	Wacker Hammer Drill Bits 1/2 i...	<input type="checkbox"/>	
RU00027	Air Impact Wrench 1 inch Drive	<input type="checkbox"/>	
RU00032	Series 10 Sucker Rod Overshot	<input type="checkbox"/>	
RU00033	Basket Grapple	<input type="checkbox"/>	

Click on the cell **Rental Terms Code**

Document No. : <input type="text"/>							
es | Manage | Line | Functions | Related | Fewer options							
Init	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	
4	:	Roll-up Package Templa...		0			
es >							

Click on the link in cell **Code** with the value **MONTH-PEND-PRO**

Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date
:	Roll-up Package Templa...		0			
		<div>CodeDescription MONTH-PEND-OPTMonthly Rental - Per. Optim MONTH-PEND-PROMonthly Rental - Per. Prorat MONTH-PEND-PRO...Monthly Rental - Per. Prorat MONTH-PSTARTMonthly Rental - Per. Billing MONTH-PSTART EAMonthly Rental - Early Per. E MONTH-PSTART-PROMonthly Rental - Per. Prorat + New</div>				

Click on the cell **Rental Quantity** with the value **0**



Enter the text 1.

Line Functions Related Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P
Roll-up Package Templa...	MONTH-PEND-P...				4/12/2021		

IMPORTANT

When inserting rental groups or units into a package, always insert directly beneath the package line or a rental line with a unit that is not a child line of a rental group.

New lines cannot be inserted after the last child line of a rental group. A message will occur advising the line cannot be split.
The reason for this is that the Renal Quantity on the group line can be increased prior to shipping, thus the line numbering after the group child lines is restricted.

Click on the row menu button

Rental Lines Manage Line Functions Related Fev				
Rental Unit No.	Stand... Text Code	Description	Rental Ter	
→ RP00004	:	Roll-up Package Temp...	MONTH-	
	:	Roll-up Template		

Sales Lines >

Click on the menu item **New Line**

Rental Lines Manage Line Functions			
Rental Unit No.	Stand... Text Code	Description	
→ RP00004	:	Roll-up Package T	
	:	Roll-up Template	

New Line

Delete Line

Select More

Shipping >

Click on the cell **Rental Unit No.**

Rental Lines Manage Line Functions			
Rental Unit No.	Stand... Text Code	Description	
→ RP00004	:	Roll-up Package T	
	:	Roll-up Template	

Sales Lines >



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows a table with columns: Rental Unit No., Stand... Text Code, Description, and Rent. The first row has the value 'RP00004' in the Rental Unit No. column. A red box highlights a small icon (the lookup button) in the same column. Below the table, there is a text box that says 'Review or update the value for Rental Unit No.' and a 'Sales Lines >' link.

Click on **Search**

The screenshot shows a 'Rental Unit List' dialog box. It has a search bar with a magnifying glass icon and the word 'Search' next to it. Below the search bar is a table with columns: No. ↑ and Description. The table lists three items: RP00001 Mini Excavator, RP00002 Wacker Skid Ste, and RP00003 Mini Excavator.

Enter **Search.**

The screenshot shows the same 'Rental Unit List' dialog box as before. The search bar now contains the text 'RU00025'. The table below still lists the same three items: RP00001 Mini Excavator, RP00002 Wacker Skid Ste, and RP00003 Mini Excavator.

Click on the link in cell **No.** with the value **RU00025**

The screenshot shows the 'Rental Unit List' dialog box. The search bar contains 'RU00025'. The table below now shows a new entry: RU00025 Wacker Hammer Dr. A red box highlights the link 'RU00025' in the 'No.' column. Below the table, there is a text box that says 'Select record "RU00025"' and a 'Wacker Hammer Dr' label.



ODT Rentals Online Help

Click on the cell **Rental Quantity** with the value **0**

Line Functions Related Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N P	
Roll-up Package Temp...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill ...	MONTH-PEND-P...	0			4/12/2021		
Roll-up Template		0					

Enter the text **2**. Press the **Enter** key.

Line Functions Related Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N P	
Roll-up Package Temp...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill ...	MONTH-PEND-P...	2			4/12/2021		
Roll-up Template		0					

Click on the row menu button

Rental Lines Manage Line Functions Related Fewer options				
Rental Unit No.	Stand... Text Code	Description	Rental Text	
RP00004		Roll-up Package Temp...	MONTH...	
→ RU00025		Wacker Hammer Dri...	MONTH...	
		Wacker Hammer Drill...	MONTH...	
		Wacker Hammer Drill...	MONTH...	
		Roll-up Template		

Click on the menu item **New Line**

Rental Lines Manage Line Functions				
Rental Unit No.	Stand... Text Code	Description	Rental Text	
RP00004		Roll-up Package Temp...	MONTH...	
→ RU00025		Wacker Hammer	MONTH...	
		Wacker Hammer	MONTH...	
		Roll-up Template		

New Line

Create a new entry.

Delete Line

Select More

Sales Lines >



Click on the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions
Rental Unit No.	Stand... Text Code	Description				
RP00004		Roll-up Package T				
→ RU00025		Wacker Hamme				
		Wacker Hamme				
		Wacker Hamme				
		Roll-up Template				

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Related
Rental Unit No.	Stand... Text Code	Description	Rent				
RP00004		Roll-up Package Temp...	MO				
→ ...							
RU00025		Wacker Hammer Dri...	MO				
		Wacker Hammer Drill...	MO				
		Wacker Hammer Drill...	MO				
		Roll-up Template					

Click on the link in cell **No.** with the value **RU00026**

RP00001	Mini Excavator with
RP00002	Wacker Skid Steer P
RP00003	Mini Excavator with
RP00004	Roll-up Package Ter
→ PG-001	Portable Generators
RU00007	16 G Brad Nailer
RU00026	Wacker Hammer Dr
RU00027	Air Impact Wrench
RU00032	Series 10 Sucker Ro
RU00033	Basket Grapple
RU00034	Spiral Grapple
RU00001	Buckeye Ditcher G

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P		
Roll-up Package Temp...	MONTH-PEND-P...	1			4/12/2021				
Wacker Hammer Drill ...	MONTH-PEND-P...	0			4/12/2021				
Wacker Hammer Dri...	MONTH-PEND-P...	0			4/12/2021				
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021				
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021				
Roll-up Template		0							



ODT Rentals Online Help

Enter the text **2**.

Line Functions Related Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P
Roll-up Package Temp...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill ...	MONTH-PEND-P...	2			4/12/2021		
Wacker Hammer Dri...	MONTH-PEND-P...	2			4/12/2021		
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021		
Roll-up Template		0					

Click on the cell **Location Code**

Functions Related Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P
Roll-up Package Temp...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill ...	MONTH-PEND-P...	2			4/12/2021		
Wacker Hammer Dri...	MONTH-PEND-P...	2			4/12/2021		
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021		
Wacker Hammer Drill...	MONTH-PEND-P...	1			4/12/2021		
Roll-up Template		0					

Click on the link in cell **Code** with the value **CENTRAL**

Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P
Roll-up Package Temp...	MONTH-PEND-P...	1		4/12/2021		
Wacker Hammer Drill ...	MONTH-PEND-P...	2		4/12/2021		
Wacker Hammer Dri...	MONTH-PEND-P...	2				
Wacker Hammer Drill...	MONTH-PEND-P...	1				
Wacker Hammer Drill...	MONTH-PEND-P...	1				
Roll-up Template		0				

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

+ New

Click on the cell **Bin Code** with the value **C-001**

Related Fewer options						
Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	N	P
Temp... MONTH-PEND-P...	1		C-001	4/12/2021		
Drill ... MONTH-PEND-P...	2	CENTI		4/12/2021		
r Dri... MONTH-PEND-P...	2			4/12/2021		
er Drill... MONTH-PEND-P...	1			4/12/2021		
er Drill... MONTH-PEND-P...	1			4/12/2021		
	0					



Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions
Rental Unit No.	Stand... Text Code	Description		
RP00004		Roll-up Package 1		
→ RU00026	⋮	Wacker Hammer		
RU00025	⋮	Wacker Hamme		
	⋮	Wacker Hamme		
	⋮	Wacker Hamme		
	⋮	Roll-up Template		

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related
Rental Unit No.	Stand... Text Code	Description			Rent
RP00004		Roll-up Package Temp...			MO
RU00026		Wacker Hammer Drill ...			MO
RU00025		Wacker Hammer Dri...			MO
→	⋮	Wacker Hammer Drill...			MO
	⋮	Wacker Hammer Drill...			MO
	⋮	Roll-up Template			

Click on the row menu button

Rental Unit List		Search	Rental	Related	Fewer options	Show as menu
No. ↑	Description	Gro... ↑ ↓				Gro... ↓
→ RU00025-001	Wacker Hammer Drill	⋮				RU
RU00025-002	Wacker Hammer Drill					RU

Click on the menu item **Select More**

Rental Unit List		Search	Rental	Related	Fewer options	Show
No. ↑	Description	Gro... ↑ ↓				Gro... ↓
→ RU00025-001	Wacker Hammer Drill	⋮				RU
RU00025	Wacker Hammer Drill	Select More				



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Click on **No. = RU00025-002**, **Description = Wacker Hammer Drill**, **Group = 0**

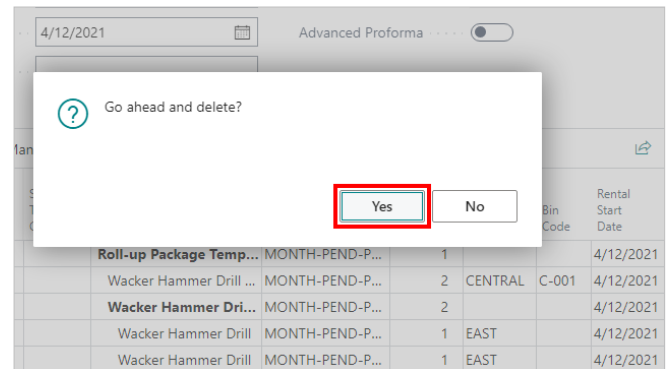
Click on the button **OK**

Once at least one group or unit is entered on the rental lines, then the description comment line can be deleted.

Click on the row menu button

Click on the menu item **Delete Line**

Click on the button **Yes**



4.3.5. Switching Package Pricing Types

4.3.5.1. How to Switch the Rental Package Pricing Type on the Rental Line

4.3.5.1.1. Overview

The following examples will demonstrate the following:

- Switching a Price Allocation package entered on a Rental Contract to utilize Roll-up Pricing.
- Switching a Roll-up Pricing package entered on a Rental Contract to utilize Price Allocation.

NOTE:

The Rental Package types cannot be switched on the Rental Line once components have been shipped.

- If a Price Allocation package has been shipped and there is a need to switch it to a Roll-up Pricing package, then the Undo Shipment must be ran in order to check the Use Roll-up Pricing field on the package line.
- If on a Roll-up package any components have been shipped, then Undo Shipment must be ran on those component lines in order to clear the Use Roll-up Pricing field on the package line.

For these examples the following fields have been added to the Rental Lines using Personalize.

- Rental Billing Start Date
- Rental Billing End Date
- Package Line Amount Excl. Tax
- Package Line Unit at Zero Price
- Use Roll-up Pricing

4.3.5.1.2. Switching a Price Allocation Package to a Roll-up Pricing Package

When the package pricing on the Rental Line is switched from Price Allocation to Roll-up Pricing the following occurs:

- The Rental Unit Price & Package Line Amount Excl. Tax will be set to 0.00 and cannot be edited.
- The Rental Unit Price on the component lines that have allocated prices will be set to the unit price on the rental price card for the group or unit and can be modified.
- If any of the Rental Package Lines on the Rental Package cards, have the field, Zero Price flagged, then the Rental Unit Price remains as 0.00 on the line and cannot be edited.

The following picture displays the Rental Lines on a contract containing a Price Allocation package, which will be used to demonstrate switching it to a Roll-up Pricing package.



On the group line that does not have a Rental Price card for the rental term, a Rental Unit Price of 600.00 was entered.

When the package pricing on the Rental Line is switched from Roll-up Pricing to Price Allocation the following occurs:

- The Rental Unit Price & Package Line Amount Excl. Tax will be set to 0.00 and cannot be edited.

The following picture displays the Rental Lines on a contract containing a Roll-up Pricing package, which will be used to demonstrate switching it to a Price Allocation package.

The Package Price for this contract for a month would be 3,000.00.

Rental Lines															
Manage Line Functions Related Fewer options															
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print
→ RP00004	:	Roll-up Package Template	MONTH-PEND-PRO	1			4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RU00018		Mini Excavator Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	900.00	1,800.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00018-004		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	900.00	900.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RU00018-005		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	900.00	900.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RU00010		Framing Air Nailer Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	600.00	1,200.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00010-001		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	600.00	600.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RU00010-002		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	600.00	600.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Click on **Use Roll-up Pricing**

Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print	Use Roll-up Pricing	Qty. to Rent	Qty. on Rent
0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0
900.00	1,800.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
900.00	900.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0
900.00	900.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0
600.00	1,200.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0
600.00	600.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0
600.00	600.00	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	0

The following picture displays the Rental Lines after the Use Roll-up Pricing field is cleared.

Note that the Rental Unit Price is set to 0.00 on the package and component lines.

When the Rental Unit Price is entered on the package line the Rental Unit Price will be allocated to the components having a Rental Price card for the Rental Term on the line.

Rental Lines															
Manage Line Functions Related Fewer options															
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print
→ RP00004	:	Roll-up Package Template	MONTH-PEND-PRO	1			4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00018		Mini Excavator Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00018-004		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00018-005		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00010		Framing Air Nailer Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00010-001		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
RU00010-002		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>

Click on the cell **Rental Unit Price** with the value **0.00**

A Rental Unit Price must be entered on the package line as Roll-up Pricing Rental Packages do not have Rental Price cards.

No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print	U R P
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	



Enter the text **3000**.

No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print	U R P
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
21	5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	

The following picture displays the Rental Lines after a Rental Unit Price was entered on the package line.

Rental Unit No.	Stand... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Package Line Amount Excl. Tax	Package Line Unit at Zero Price	Pkg. Line No Print	Use Roll-up Pricing	Qty. to Rent
→ RP00004		Roll-up Package Template	MONTH-PEND-PRO	1			4/12/2021		5/11/2021	4/12/2021	5/11/2021	3,000.00	3,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0
RU00018		Mini Excavator Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	1,500.00	3,000.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0
RU00018-004		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	1,500.00	1,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
RU00018-005		Mini Excavator	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	1,500.00	1,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
RU00010		Framing Air Nailer Group	MONTH-PEND-PRO	2			4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0
RU00010-001		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
RU00010-002		Framing Air Nailer	MONTH-PEND-PRO	1	EAST		4/12/2021		5/11/2021	4/12/2021	5/11/2021	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1

NOTES:

- The Rental Package Price was only allocated to the group RU00018 and it's child lines.
- The group RU00010 and child lines were not included in the allocation of the package price as the group does not have a Rental Price card for the Rental Term on the line.
- The restrictions related to the Price Allocation packages will now apply to the component lines. Such as the Rental Start Date and Rental Billing End Date cannot be modified and the Rental Unit Price cannot be entered or modified on the component lines.

The contract can now be processed per the help, How to Process Contracts with Rental Price Allocation Packages.

4.4. Rental Sales Kits

4.4.1. Rental Sales Kits Overview

4.4.1.1. Overview

Along with renting of equipment, some organizations sell item accessories, charge delivery and/or pickup charges and provide resources, such as equipment operators.

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, Resources and Item Charges, that commonly accompany the rental. In addition, Standard Text Codes, or description comments, can be included in the kit.

NOTE:

Although the Sales Type options on the Rental Sales Kit and Sales Lines on the rental documents includes Fixed Asset, currently Fixed Assets cannot be sold from the Sales Lines on a Rental Contract.

When a kit is setup on a group, then when the group is entered on a quote or contract, the kit lines will populate the sales lines only once. It does not populate for each child unit line. For example, if the group line has a rental quantity of 4, then the kit lines on the group only default to the sales lines once, not 4 times.

If a unit assigned to a group is entered on the line without the group, the rental sales kit will default from the group to the sales lines.

When an item has special prices or discounts, they will be applied to the price that defaults to the sales line, whether it is the unit price or the overridden unit price.

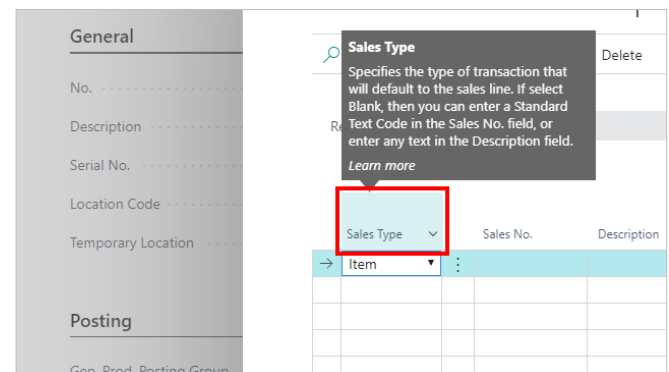
The Rental Kit records default onto the Rental Quote or Contract Sales Lines, and can be modified or deleted to match the customer requirements.

Changes on the sales line of the document will not be written back to the Rental Sales Kit on the rental unit, group or package.

4.4.1.2. Overview of the Rental Sales Kit

Click on the column header **Sales Type**

The Sales Type field is used to select the type of record to be included in the kit lines.



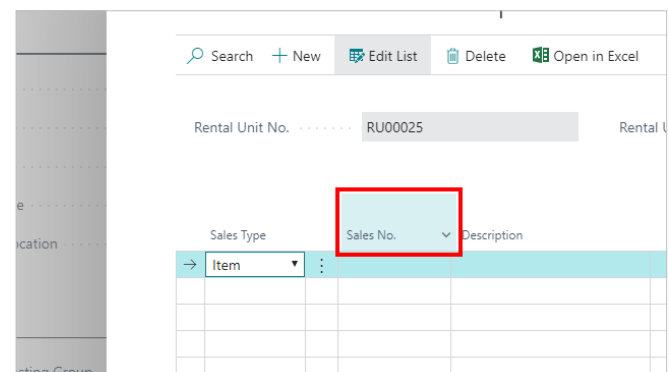
The Sales Types include blank, item, resource, g/l account, fixed asset and item charge. Blank is used when a Standard Text Code, or a description comment are to be added to the kit lines.

NOTE:

Currently Fixed Assets cannot be sold from the Sales Lines on a Rental Contract.

Click on the column header **Sales No.**

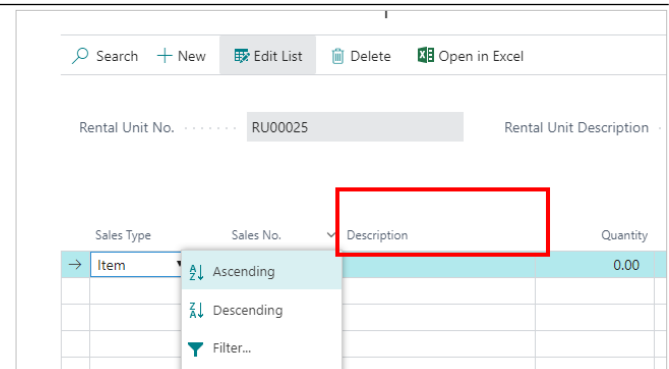
The Sales No. field is used for selecting the number related to the Sales Type selected to be included in the kit lines.



Click on the column header **Description**

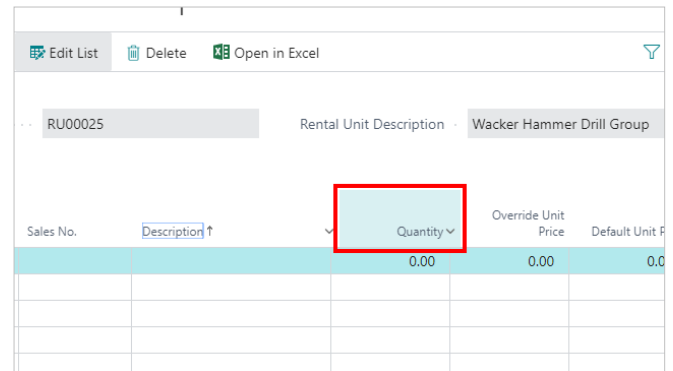
The Description field will default the description or name of the Sales No. selected and can be overridden.

When the Sales Type and Sales No. fields are left blank, then a comment can be entered, which will default to the sales lines.



Click on the column header **Quantity**

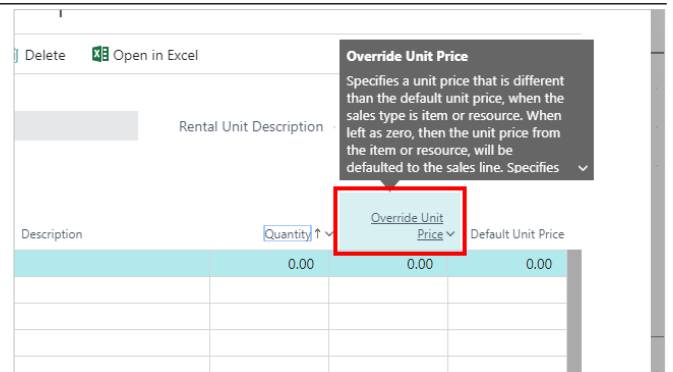
The quantity of the selected Sales No. is to be entered in this field.



Sales No.	Description ↑	Quantity ↓	Override Unit Price	Default Unit Price
		0.00	0.00	0.00

Click on the column header **Override Unit Price**

When the Sales Type is G/L Account or Item Charge, then the unit price must be entered into this field, in order to populate the Sales Line, Unit Price Excl. Tax field.

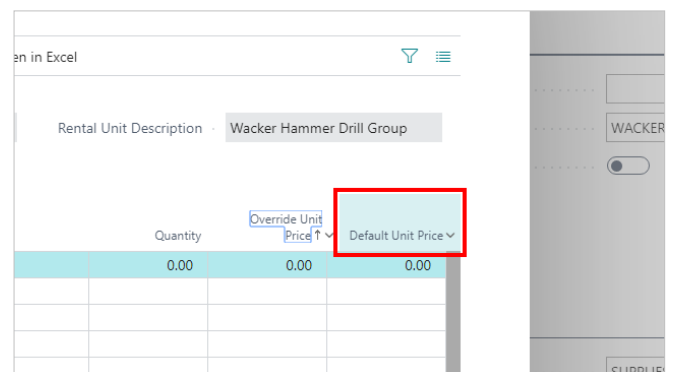


Description	Quantity ↑	Override Unit Price ↓	Default Unit Price
	0.00	0.00	0.00

When a price is entered in the Override Unit Price field, and the Sales Type is Item or Resource, the Override Unit Price will default to the sales lines on the rental documents.

Click on the column header **Default Unit Price**

The Default Unit Price is automatically populated from the Item or Resource selected, when the Sales Type is Item or Resource for informational purposes only.



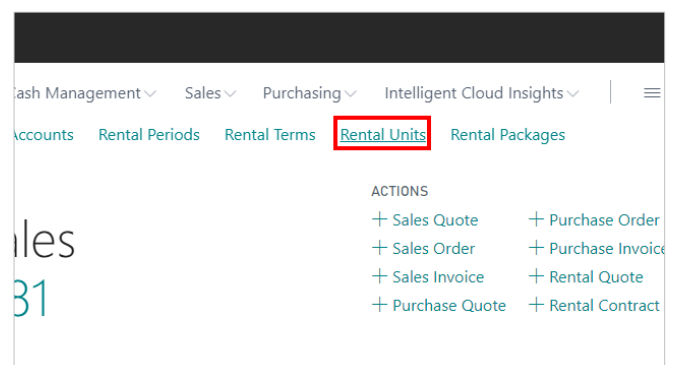
Quantity	Override Unit Price ↓	Default Unit Price ↓
0.00	0.00	0.00

4.4.2. How to Add Rental Sales Kits to Rental Units and Packages

4.4.2.1. How to Add a Rental Sales Kit to a Rental Unit Group

The following example demonstrates the setup of a Rental Sales Kit on a Rental Group.

Click on the navigation menu item **Rental Units**



Navigation Menu	Actions
Rental Units	+ Sales Quote + Purchase Order
	+ Sales Order + Purchase Invoice
	+ Sales Invoice + Rental Quote
	+ Purchase Quote + Rental Contract



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Click on the link in cell **No.** with the value **RU00025**

RU00023-001	Ford 150 Trucks	<input type="checkbox"/>	RU00023
RU00023-002	Ford 150 Trucks	<input type="checkbox"/>	RU00023
RU00023-003	Ford 150 Trucks	<input type="checkbox"/>	RU00023
RU00024	Wacker 50Z3 Excavator Group	<input checked="" type="checkbox"/>	RU00024
RU00024-001	Wacker 50Z3 Excavator	<input type="checkbox"/>	RU00024
RU00024-002	Wacker 50Z3 Excavator	<input type="checkbox"/>	RU00024
RU00024-003	Wacker 50Z3 Excavator	<input type="checkbox"/>	RU00024
RU00025	Wacker Hammer Drill Group	<input checked="" type="checkbox"/>	RU00025
RU00025	Wacker Hammer Drill Group	<input type="checkbox"/>	RU00025

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

... UNIT CARD - RU00025 - WACKER HAMMER DRILL GROUP | WORK DATE: 4/6/2020

RU00025 · Wacker Hammer Drill Group

Process **Rental** Actions Navigate Fewer options

General

No. RU00025

Description Wacker Hammer Drill Group

Serial No.

Click on the navigation menu item **Rental Sales Kit**

Metered Usage Entries Default Dimensions **Rental Sales Kit**

View or edit the rental sales kit, which default to the s

Rental Category Code

Search Description WACKER HAMMER DRILL GROUP

Inactive ☐

Click on the navigation menu item **New**

... UNIT CARD - RU00025 - W

RU00025 · W

Process Rental

General

No.

Description

Serial No.

Location Code

View - Rental Sales Kit - Hammer Drill Group

Search **+ New** Edit List Delete Oper

Create a new entry.

Rental Unit No. RU00025



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Click on the cell **Sales Type** with the value **G/L Account Item Resource Fixed Asset Charge (Item)**

Click on Item in the list

Select the type to be added to the kit.

Click on the cell **Sales No.**

Click on the lookup button in the cell **Sales No.**



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Click on the link in cell **No.** with the value **1002**

The list will display the records related to the Sales Type selected.

Sales Type	Sales No.	Description
→ Item		
	No. ↑	Description
	→ 1000	Portable Generators
	1001	Wacker Hammer Drill Bits 3/16...
	1002	Wacker Hammer Drill Bits 3-Fla...
	1003	Select record "1002" 1/2 Wrench, 1 in.
	1004	Air Impact Wrench, 1/2 inch
	1005	AIR IMPACT WRENCH
	+ New	

Click on the cell **Quantity** with the value **0.00**

RU00025

Rental Unit Description

Wacker Hammer Drill Group

Sales No.	Description	Quantity	Override Unit Price	Default Unit
1002	Wacker Hammer Drill Bits 3-...	0.00	0.00	27

Enter the text **2**.

RU00025		Rental Unit Description	Wacker Hammer Drill Group	
Sales No.	Description	Quantity	Override Unit Price	Default Unit
1002	Wacker Hammer Drill Bits 3-...	<div><div></div><div>0.00</div></div>	0.00	27

Click on the cell **Override Unit Price**

As the record is an item, the entry of a price in the **Override Unit Price** will default to the sales lines, instead of the Unit Price. If the **Override Unit Price** is left as a zero amount, then the Unit Price will default to the sales lines.

Rental Unit Description

Wacker Hammer Drill Group

Description	Quantity	Override Unit Price	Default Unit Price
Wacker Hammer Drill Bits 3-...	2	0.00	27.00



Click on the cell **Sales No.**

Rental Unit No. RU00025 Rental

Sales Type	Sales No.	Description
Item	1002	Wacker Hammer Drill Bits 3-...
→ Charge (Item) :	<input type="text" value=""/>	
	Look up value	
	No. ↑	Description
→	JB-FREIGHT	Freight Charge (JB-Sp
	P-ALLOWANCE	Purchase Allowance
	P-FREIGHT	Misc. Freight Charge

Click on the link in cell **No.** with the value **S-FREIGHT**

→ Charge (Item) :

No. ↑	Description
P-FREIGHT	Misc. Freight Charge (Purch
P-RESTOCK	Purchase Restock Charge
S-ALLOWANCE	Sales Allowance
S-FREIGHT	Misc. Freight Charges (Sales
S-R	Select record "S-FREIGHT" Restock Charge
+ New	

Click on the cell **Quantity** with the value **0.00**

RU00025		Rental Unit Description	Wacker Hammer Drill Group	
Sales No.	Description	Quantity	Override Unit Price	Default Unit
1002	Wacker Hammer Drill Bits 3-...	2.00	25.00	27
		0.00	0.00	0

Enter the text **1**.

RU00025		Rental Unit Description	Wacker Hammer Drill Group	
Sales No.	Description	Quantity	Override Unit Price	Default Unit
1002	Wacker Hammer Drill Bits 3-...	2.00	25.00	27
		0.00	0.00	0

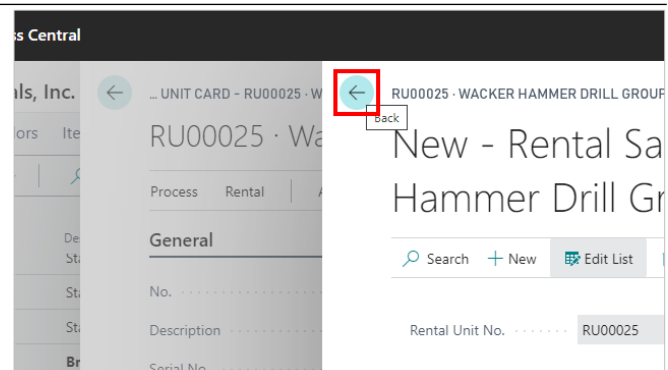
Click on the cell **Description**

Sales Type	Sales No.	Description	Quantity
Item	1002	Wacker Hammer Drill Bits 3-...	2.00
Charge (Item)			1.00
→	SUC	Sale under Contract	0.00

Enter the text **A restocking charge will be billed for returned items.**

Sales Type	Sales No.	Description	Quantity
Item	1002	Wacker Hammer Drill Bits 3-...	2.00
Charge (Item)			1.00
	SUC	Sale under Contract	0.00
→			0.00

Click on the back button



4.4.3. How to Process Contracts with Rental Kits

4.4.3.1. Overview

If a unit assigned to a group is entered on the line without the group, the rental sales kit will default from the group to the sales lines.

When an item has special prices or discounts, they will be applied to the price that defaults to the sales line, whether it is the unit price or the overridden unit price.

The Rental Kit records default onto the Rental Quote or Contract Sales Lines, and can be modified or deleted to match the customer requirements. Changes on the sales line of the document will not be written back to the Rental Sales Kit on the rental unit, group or package.

4.4.3.2. How to Process a Contract with a Rental Kit

The following example demonstrates the entry and processing of a Rental Contract where a Rental Unit assigned to a group, which has a Rental Sales Kit setup, will be rented out.

ODT Rentals Online Help

Click on the navigation menu item **Rental Contract**

Posted Documents ▾

Transfer Orders Rental Quotes Rental Contracts Rental Periods Rental Terms

ACTIONS

+ Sales Quote	+ Sales Credit Memo	> Tasks
+ Sales Invoice	+ Rental Quote	> Sales
+ Sales Order	+ <u>Rental Contract</u>	> Reports
+ Sales Return Order	+ Rental Unit	

Create a new rental contract for rental product



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Click on the link in cell **No.** with the value **RU00025-001**

When a unit or child unit of a group that has a Rental Sales Kit is entered on the Rental Line, then the records in the kit automatically populate the Sales Lines.

The Sales Lines can be modified or deleted, as needed.

When Locations are mandatory and a Rental Sales Kit is setup on a unit or group and the lines contain an Item, and a Location Code was not specified, then the following inventory availability message will occur.

A Location Code will need to be entered on the Item Sales Line in order to process the sale of the item.

Click on **The available inventory for item 1002 at location , is lower than the entered quantity.**



Click on the cell **Location Code**

Image	Line	Fewer options				
No.	Description	Location Code	Bin Code	Quantity	Unit of Measure	
1002	Wacker Hammer Drill Bits 3-Fla...			2	PCS	
S-FREIGHT	Misc. Freight Charges (Sales)		Look up value	1		
SUC	Sale under Contract			0		
	A restocking charge will billed f...			0		

Click on the link in cell **Code** with the value **SOUTH**

When the Location Code is specified on the Sales Line for the Item, the Inventory Availability message is cleared from the header of the contract.

Wacker Hammer Drill		MONTH, PEND	1	FAST		
		Code ↑	Name			
		→ CENTRAL	Central Warehouse			
		EAST	East Warehouse			
		MAIN	Main Warehouse			
		RENTRESERV	Inventory Items Rental Rese			
		SOUTH	South Warehouse			
		Select record "SOUTH"				
		+ New				
				2	PCS	
EIGHT	Misc. Freight Charges (Sales)			1		
	Sale under Contract			0		
	A restocking charge will billed f...			0		

When an item in the Rental Sales Kit is stored in bins, then the Bin Code field will need to be added to the Sales Line using Personalize.

For demonstration purposed the Bin Code field was added previously.

Click on the cell **Bin Code** with the value **S-001**

When an item that is stored in bins is a part of a Rental Sales Kit, then the Default Bin automatically defaults to the Sales Line. The Bin Code can be changed, if required.

Fewer options						
Description	Location Code	Bin Code	Quantity	Unit of Measure	Code	
Wacker Hammer Drill Bits 3-Fla...	SOUTH	S-001	2	PCS		
Misc. Freight Charges (Sales)		S-001	1			
Sale under Contract			0			
A restocking charge will billed f...			0			

Click on the cell **Type** with the value **Charge (Item)**

Sales Lines		Manage	Line	Fewer options
Type	No.	Description	Location Code	
→ Item	1002	Wacker Hammer Drill Bits 3-Fla...	SOUTH	
Charge (Item)	S-FREIGHT	Misc. Freight Charges (Sales)		
		Sale under Contract		
		A restocking charge will billed f...		
Shipping				



Click on the navigation menu item popup **Line**

Rental Unit No.	Text Code	Description	Code
→ RU00025-001	:	Wacker Hammer Drill	MONTH-PE

Sales Lines

Manage

Line

Fewer options

Type	No.	Description	Location Cod
Item	1002	Wacker Hammer Drill Bits 3-Fla...	SOUTH
→ Charge (It	S-FREIGHT	Misc. Freight Charges (Sales)	
	SUC	Sale under Contract	

Click on the navigation menu item **Item Charge Assignment**

Sales Lines

Manage

Line

Fewer options

Dimensions

Item Charge Assignment

Item Tracking Lines

Assign additional direct costs, for example for freight, to the ite

Item	No.	Description	Location Cod
→ Charge (Item)	S-FREIGHT	Misc. Freight Charges (Sales)	
	SUC	Sale under Contract	

A restocking charge will billed f...

Click on the cell **Qty. to Assign** with the value **0.00**

IGHT MISC. FREIGHT CHARGES (SALES)

Item No.	Description	Qty. to Assign	Qty. Assigned	Amount to Assign
1002	Wacker Hammer Drill Bits 3-Fla...	0.00		0.00

3LE

TO ASSIGN

REM. TO ASSIGN

1

0

1

Enter the text **1**. Press the **Enter** key.

IGHT MISC. FREIGHT CHARGES (SALES)

Item No.	Description	Qty. to Assign	Qty. Assigned	Amount to Assign
1002	Wacker Hammer Drill Bits 3-Fla...			0.00

3LE

TO ASSIGN

REM. TO ASSIGN

1

0

1



Click on the button **Close**

SSIGN

REM. TO ASSIGN

1	0
5	0

Close

Rental Start Date	Rental Return Date	Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent
4/20/2020	5/19/2020	500.00	0.00	0.00		SUPPLIES	1	0

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 4/20/2020

Rental Contract · RC00035

ProcessContractRentalActionsNavigateFewer options

General

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date4/20/2020

Click on the navigation menu item **Ship Rentals**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 4/20/2020

Rental Contract · RC00035

ProcessContractRentalActionsNavigateFewer options

Ship RentalsReturn RentalsBulk ReturnsInvoiceInv

Post the shipment of the rental units on the rental lines. A posted delivery document will be posted deliveries.

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date4/20/2020

Click on the button **Yes**

Outstanding Amount

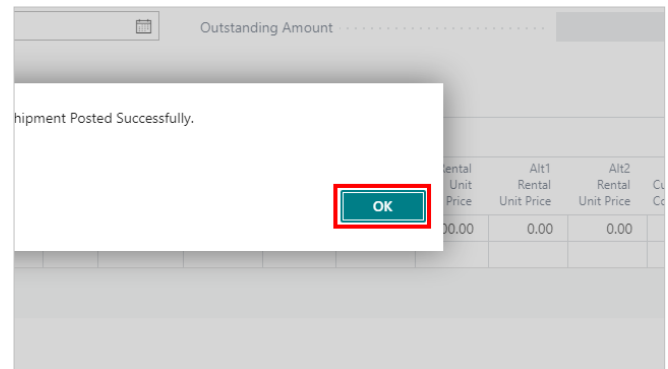
?

Are you sure you want to Ship this rental contract?

YesNo

Rental Unit Price	Alt1 Rental Unit Price
00.00	0.00

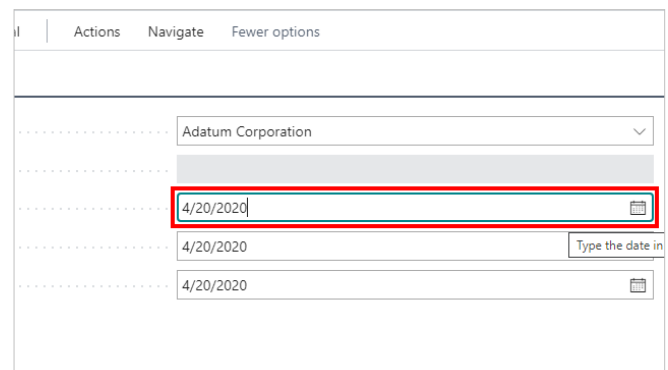
Click on the button **OK**



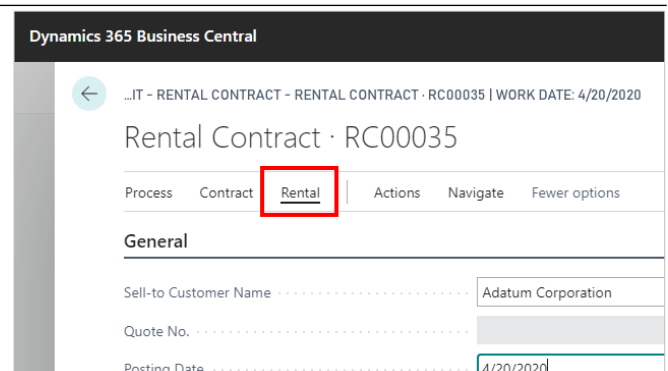
When an organization wants to invoice the sales lines upfront, then after the unit or units are shipped an invoice should be posted.

The following demonstrates the posting of the invoice to invoice the sales lines.

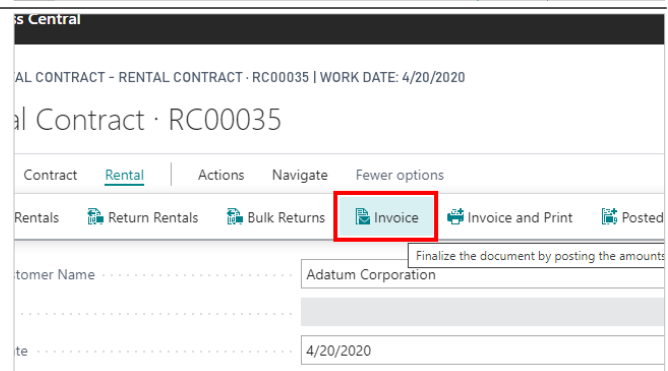
Click on the field **Posting Date**



Click on the navigation menu item popup **Rental**

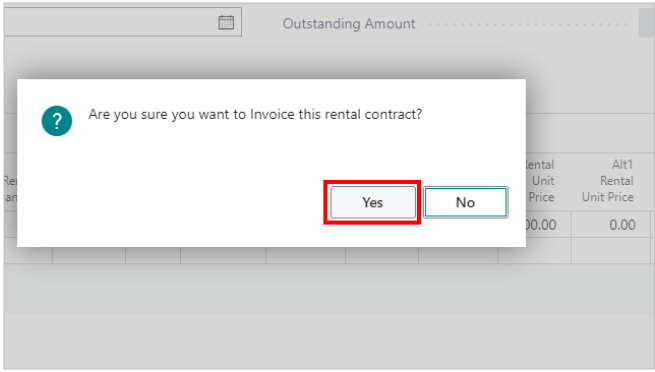


Click on the link **Invoice**

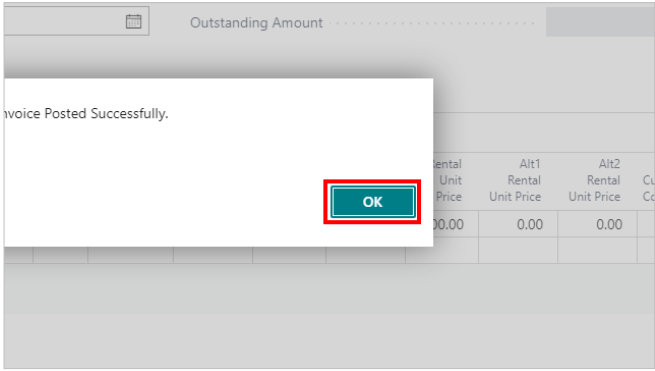




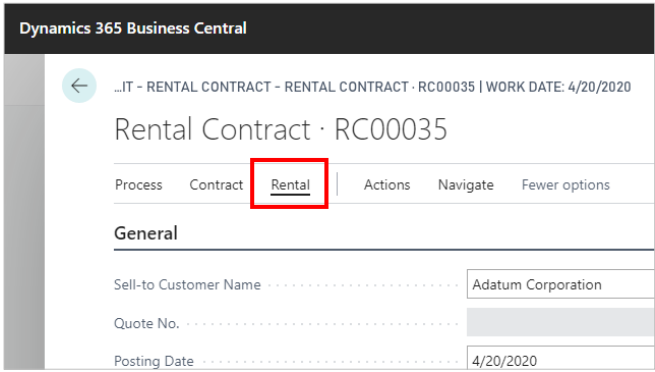
Click on the button **Yes**



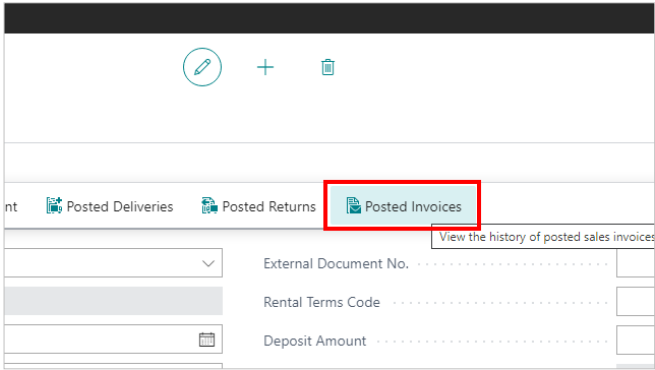
Click on the button **OK**



Click on the navigation menu item popup **Rental**



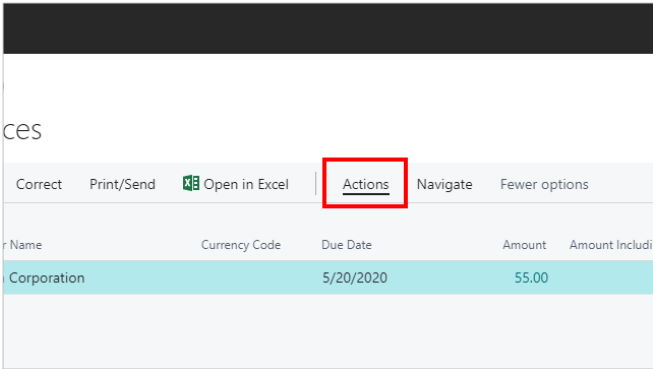
Click on the navigation menu item **Posted Invoices**





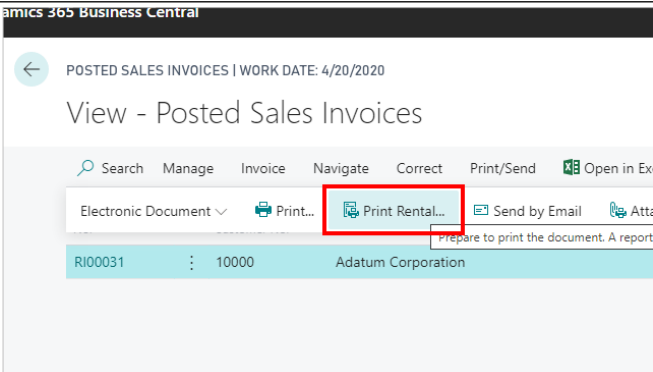
ODT Rentals Online Help

Click on the navigation menu item popup **Actions**



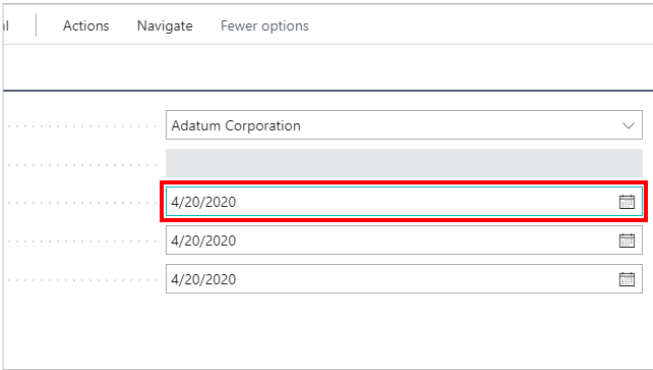
Click on the navigation menu item **Print Rental...**

The Rental Invoice can be printed, sent to pdf or previewed.

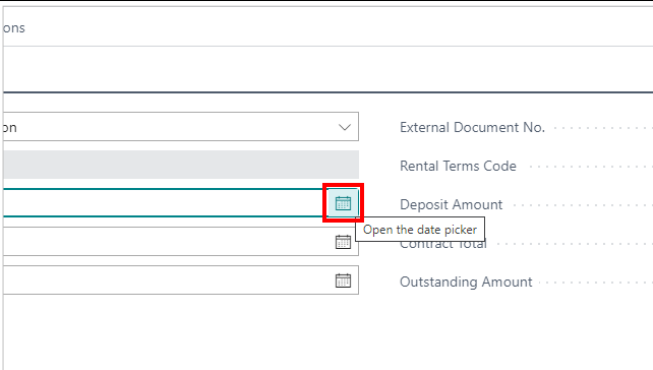


The following demonstrates the invoicing and return of the unit, which are standard rental processing steps.
There are no other steps related to the Rental Sales Kit.

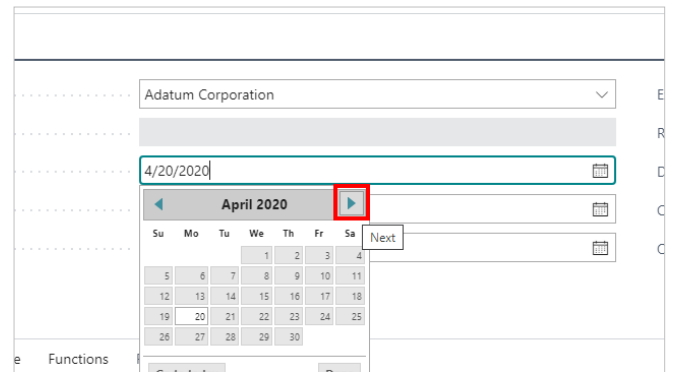
Click on the field **Posting Date**



Click on the link **Open the date picker**

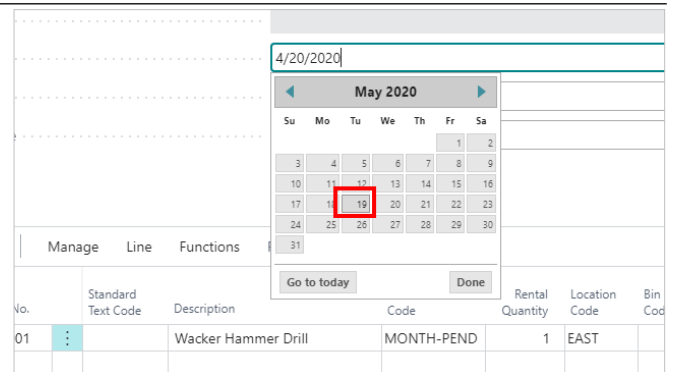


Click on the link **Next**

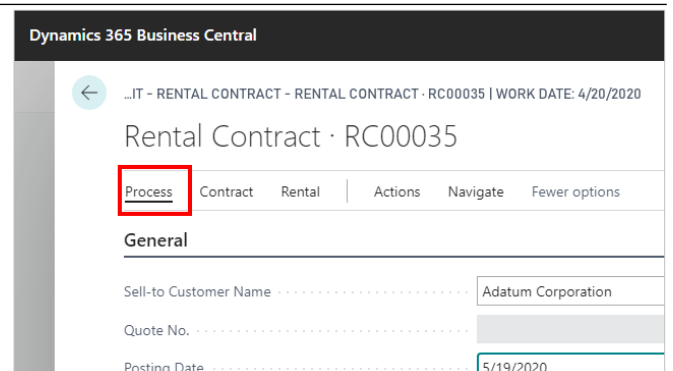


Click on a date in the calendar

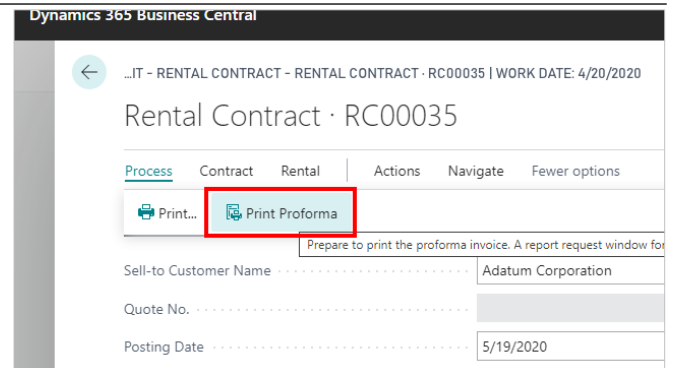
Select the date that the invoicing is to occur on.



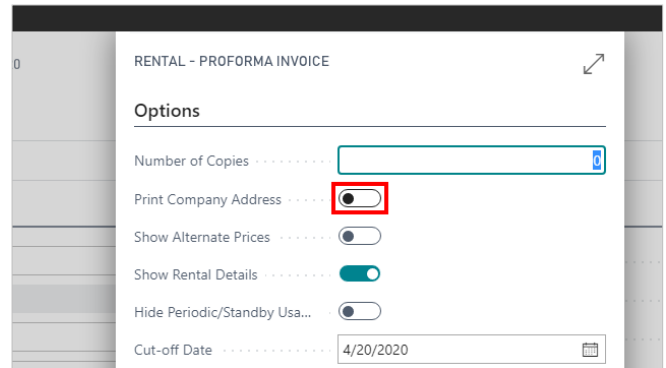
Click on the navigation menu item popup **Process**



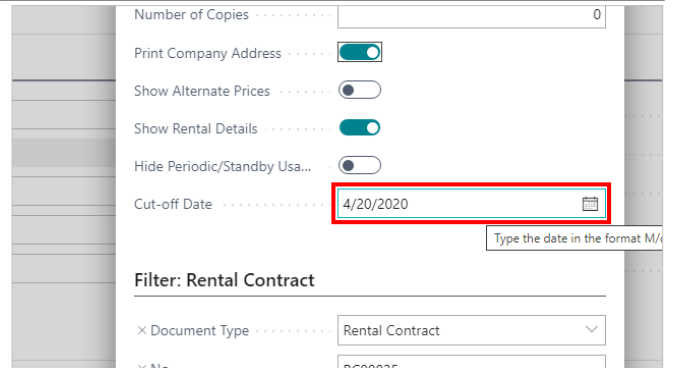
Click on the navigation menu item **Print Proforma**



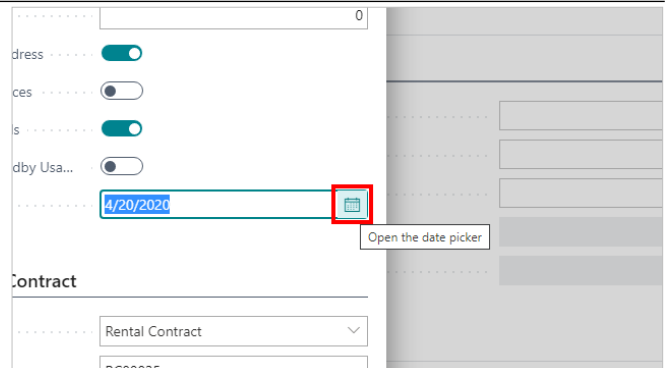
Click on the toggle field Print Company Address



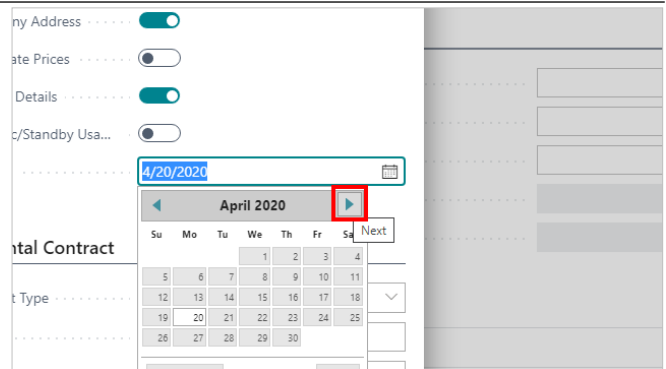
Click on the field **Cut-off Date**



Click on the link **Open the date picker**



Click on the link **Next**





Click on a date in the calendar

Click on **Send to... Print Preview Cancel**

The Proforma invoice can be sent to pdf, printed or previewed prior to posting the invoice for verification purposes.

Click on the field **Posting Date**

In this example, the Rental Unit is being returned on the Rental Return Date. Verify the Posting Date is set to the date of return.

Click on the navigation menu item popup **Rental**



Click on the link **Invoice**

Contract Central

AL CONTRACT - RENTAL CONTRACT - RC00035 | WORK DATE: 4/20/2020

Contract · RC00035

Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns Invoice Invoice and Print Posted

Finalize the document by posting the amounts

Customer Name Adatum Corporation

Date 5/19/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

Click on the cell **Qty. to Return** with the value **0**

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qt Returns
0.00	0.00		SUPPLIES	0	1	0	



Enter the text **1**.

Alt1 Rental Unit Price	Alt2 Rental Unit Price	Curre... Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return
0.00	0.00		SUPPLIES	0	1	<input type="text" value="1"/>	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

...IT - RENTAL CONTRACT - RENTAL CONTRACT - RC00035 | WORK DATE: 4/20/2020

Rental Contract · RC00035

ProcessContract**Rental**ActionsNavigateFewer options

General

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date5/19/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

←

...IT - RENTAL CONTRACT - RENTAL CONTRACT - RC00035 | WORK DATE: 4/20/2020

Rental Contract · RC00035

ProcessContractReturnActionsNavigateFewer options

Ship Rentals

Return Rentals

Bulk Returns

Invoice

Inv

Post the return of the rental units on the rental lines. A posted return.

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date5/19/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Return this rental contract?

Yes

No

Click on the button **OK**

Return Posted Successfully.

OK

4.5. Rental Custom Calendar

4.5.1. Rental Custom Calendar Overview

4.5.1.1. Overview

Some organizations have customers which require the rental product to be on their site, on standby, to be immediately available for use, when needed. The rental organization may have an agreement with the customer, to bill a reduced daily rate for the days the rental product is on standby.

Other organizations may have agreements with customers whereby specific days will not be billed to customers. For example, statutory holidays.

Another example would be where the rental price is a weekly price, however, the weekend days are not billed to the customer. The customer is billed for the 5 days at a prorated daily rate.

The ODT Rental Custom Calendar provides the ability to specify days as non-billable and days that a standby price is to be billed to the customer, rather than the rental unit price.

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 Rental Term on the rental line does not have the Period Code set to Day or does not have Prorate enabled, then when days are specified as Non-Billable, the customer will still be billed the full period rate.

When the term has the Prorate field set to All periods, then based on the number of days to be billed in the rental period, the rental price will be prorated.

NOTE:

Optimization is not compatible with this feature, therefore is not to be used with the feature.

Should a situation occur where the Rental Unit out on rental needs to be replaced using the rental swap, then any settings of days as Non-Billable or Use Standby Price which have not been invoiced will be transferred to the replacing rental unit.

4.5.1.2. Rental Custom Calendar Fields

The rental calendar displays the days for each rental period in the contract.

When the contract is for multiple rental periods, then the calendar will consist of multiple views. One for each rental period.

For example, when the rental term on the selected rental line is for a rental period of week, and the contract is for 3 weeks.

When opening the calendar, the first view will be for the first rental period and display the days of that week.

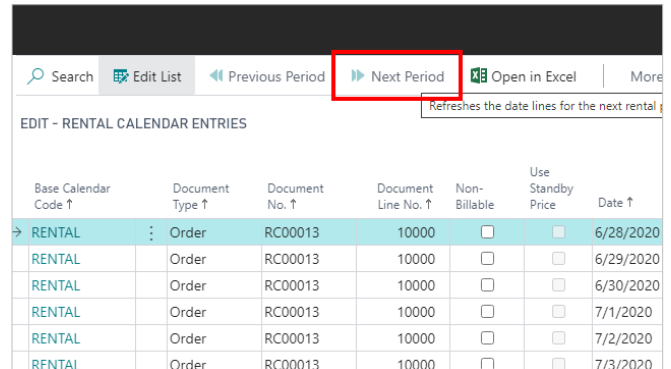
The days of the second week are displayed when the menu option Next Period is selected. And the days of the

third week are displayed when Next Period is selected again.

The following provides a brief description of the purpose of the menu options.

Click on the navigation menu item **Next Period**

When selected the date lines will be refreshed to display the date lines for the following rental period, if applicable.

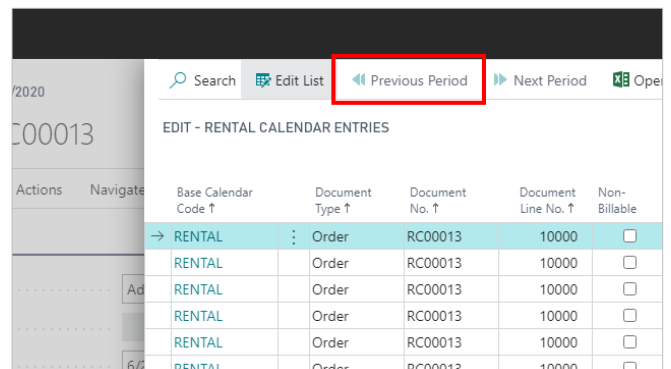


Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑
→ RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020

The Previous Period menu option will be selectable, if the Next Period had been selected.

Click on the navigation menu item **Previous Period**

When selected the date lines will be refreshed to display the date lines for the previous rental period.

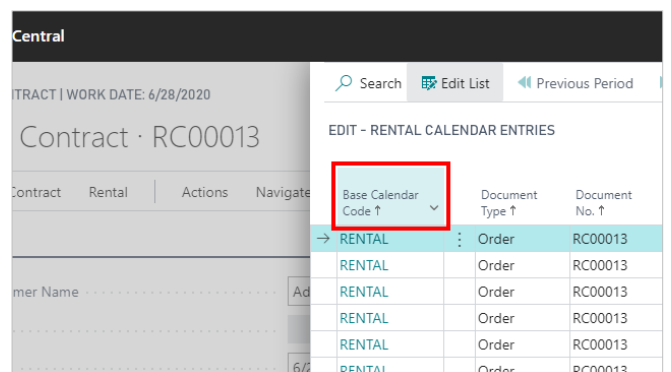


Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Non-Billable
→ RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>

The following provides a brief description of the purpose of the menu options.

Click on the column header **Base Calendar Code**

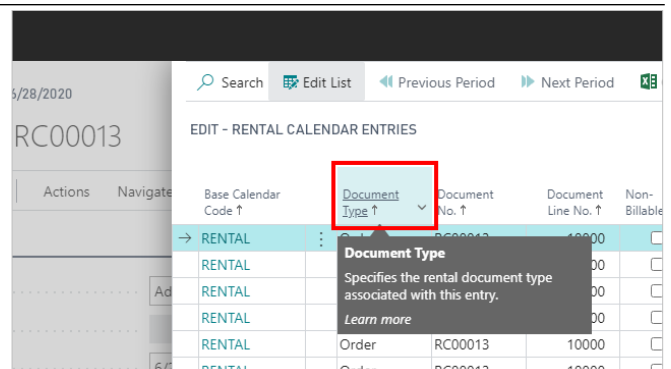
Specifies the calendar code associated with this entry. The calendar code defaults from the Calendar Code field on the General tab of the quote or contract.



Base Calendar Code ↑	Document Type ↑	Document No. ↑
→ RENTAL	Order	RC00013
RENTAL	Order	RC00013
RENTAL	Order	RC00013
RENTAL	Order	RC00013
RENTAL	Order	RC00013
RENTAL	Order	RC00013

Click on the column header **Document Type**

Specifies the rental document type associated with this entry.



Base Calendar Code ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Non-Billable
→ RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>

Document Type
Specifies the rental document type associated with this entry.
[Learn more](#)



Click on the column header **Document No.**

Specifies the rental document number associated with this entry.

The screenshot shows a table titled "EDIT - RENTAL CALENDAR ENTRIES". The columns are: Base Calendar Code, Document Type, Document No., Document Line No., Non-Billable, and Use Standby Price. The "Document No." column is highlighted with a red box. The table contains several rows of rental entries, all with "Document No." set to "RC00013".

Base Calendar Code	Document Type	Document No.	Document Line No.	Non-Billable	Use Standby Price
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>

Click on the column header **Document Line No.**

Specifies the rental document line number associated with the entry.

The screenshot shows the same table as before, but now the "Document Line No." column is highlighted with a red box. A tooltip is visible over the "Document Line No." header, stating: "Document Line No. Specifies the rental document line number associated with this entry. Learn more".

Base Calendar Code	Document Type	Document No.	Document Line No.	Non-Billable	Use Standby Price	Date
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020
RENTAL	Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020

Click on the column header **Non-Billable**

When checked the day is considered to be non-billable.

The screenshot shows the same table, but now the "Non-Billable" column is highlighted with a red box. The table shows rental entries for various dates, with the "Non-Billable" checkbox checked for the first three entries (6/28/2020, 6/29/2020, 6/30/2020) and unchecked for the last three (7/1/2020, 7/2/2020, 7/3/2020).

Document Type	Document No.	Document Line No.	Non-Billable	Use Standby Price	Date	Day
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday

Click on the column header **Use Standby Price**

When checked the day will be billed at the standby rate, entered on the rental line, instead of the rental unit price on the line.

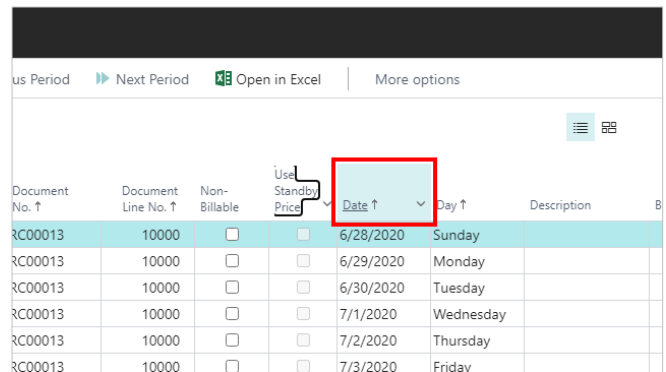
The screenshot shows the same table, but now the "Use Standby Price" column is highlighted with a red box. The table shows rental entries for various dates, with the "Use Standby Price" checkbox checked for the first three entries (6/28/2020, 6/29/2020, 6/30/2020) and unchecked for the last three (7/1/2020, 7/2/2020, 7/3/2020).

Document Type	Document No.	Document Line No.	Non-Billable	Use Standby Price	Date	Day	Description
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday	
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday	
Order	RC00013	10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday	
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday	
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday	
Order	RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday	

The Standby Price field can only be checked, when the rental term on the line has a rental period code of Day.

Click on the column header **Date**

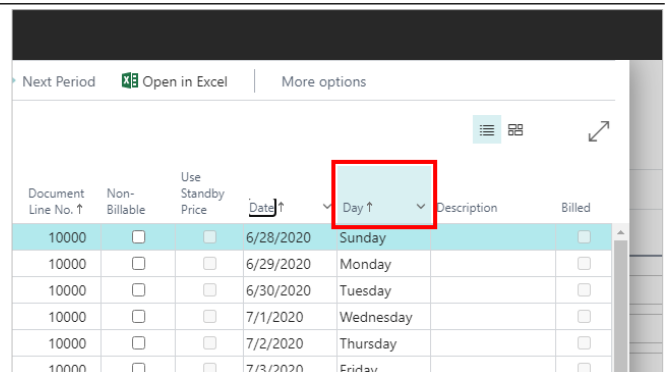
Specifies the date associated with the entry.



Document No. ↑	Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑	Day ↑	Description	Billed
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday		
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday		
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday		
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday		
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday		
RC00013	10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday		

Click on the column header **Day**

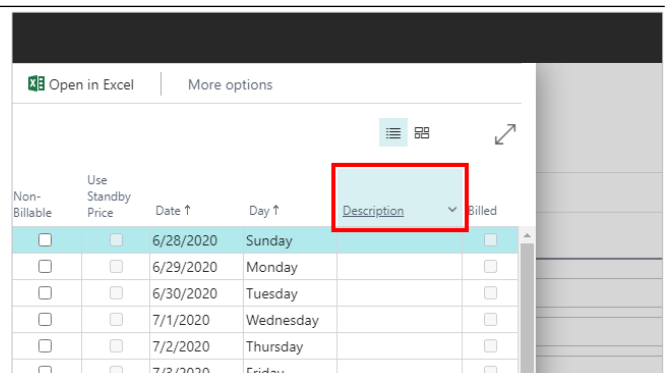
Specifies the day of the week associated with the entry.



Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑	Day ↑	Description	Billed
10000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday		<input type="checkbox"/>
10000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday		<input type="checkbox"/>
10000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday		<input type="checkbox"/>
10000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday		<input type="checkbox"/>
10000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday		<input type="checkbox"/>
10000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday		<input type="checkbox"/>

Click on the column header **Description**

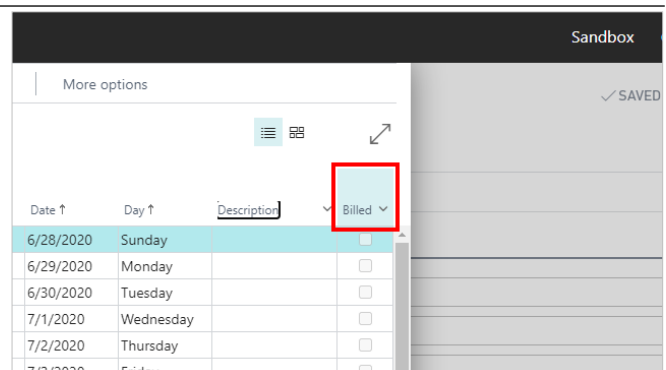
Specifies the description associated with the entry.



Non-Billable	Use Standby Price	Date ↑	Day ↑	Description	Billed
<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday		<input type="checkbox"/>

Click on the column header **Billed**

Specifies whether the entry has been invoiced. This field is automatically checked, when the day has been invoiced.



Date ↑	Day ↑	Description	Billed
6/28/2020	Sunday		<input type="checkbox"/>
6/29/2020	Monday		<input type="checkbox"/>
6/30/2020	Tuesday		<input type="checkbox"/>
7/1/2020	Wednesday		<input type="checkbox"/>
7/2/2020	Thursday		<input type="checkbox"/>
7/3/2020	Friday		<input type="checkbox"/>

4.5.2. How to Process Contracts using the Rental Custom Calendar

4.5.2.1. Overview

In order to use the Rental Custom Calendar feature, a Base Calendar must be setup.

To learn how to setup a Calendar, see ODT Rental Online Help, Additional Rental Processes, Periodic Usage and Standby Charges, How to Set Up Rental Management Setup for Periodic Usage.



If a calendar has been setup and specified on the Rental Management Setup in the Default Rental Calendar field, then this calendar defaults to the Rental Quote and Rental Contract, General tab. The Rental Calendar field can be overridden on the quote and contract.

If no calendar is specified on Rental Management Setup, then a calendar can be selected on the General tab of the Rental Quote and Rental Contract.

When an organization will be billing a standby rate for some days, the Standby Unit Price field will need to be added to the Rental Lines using Personalize. The Standby Unit Price must be entered on the Rental Line, when checking the Use Standby Price field in the calendar.

4.5.2.2. How to Process a Contract with a Daily Rental Term

The following example demonstrates the use of the Rental Custom Calendar, when the Rental Term on the contract rental line has a Period Code of Day, for a daily rate.

In the example, the calendar has been setup on Rental Management Setup. Therefore the calendar defaults to the contract General tab.

The setting of some days as non-billable, and some days to use the Standby Price will be demonstrated.

Click on the navigation menu item **Rental Contract**

The screenshot shows a navigation menu with the following items: Posted Documents, Setup & Extensions, and a hamburger menu icon. Below these are several tabs: Sales, Transfer Orders, Rental Quotes, Rental Contracts, Rental Periods, and Rental Terms. Under the 'Rental Contracts' tab, there is a list of actions: + Sales Quote, + Sales Invoice, + Sales Order, + Sales Return Order, + Sales Credit Memo, + Rental Quote, + Rental Contract (highlighted with a red box), and + Rental Units. To the right of these actions are links to Tasks, Sales, Reports, and Rental Management.

Click on the field **Sell-to Customer Name**

The screenshot shows a form with a 'Sell-to Customer Name' field. The field is highlighted with a red box, and a dropdown menu is open, showing a list of customer names. The first item in the list is 'Adatum Corporation' with a value of 10000. Other items include 'School of Fine Art', 'Alpine Ski House', and 'Relecloud'.

Click on the link in cell **No.** with the value **10000**

The screenshot shows a form with a 'No.' field. The field is highlighted with a red box, and a dropdown menu is open, showing a list of values. The first item in the list is '10000' with a value of 10000. Other items include '2000', '30000', '40000', and '50000'. The dropdown menu also shows a search bar and a 'Select record' option.



Click on the button **Show more**

A screenshot of a web form. At the top right, there are icons for 'SAVED', a bookmark, a share icon, and a print icon. Below these is a blue circular icon with a question mark. The form contains several input fields. One field has a value of '0.00'. At the bottom right, there is a summary row with the value '4,080.00'. A red box highlights a button labeled 'Show more' on the right side of the form.

Click on the field **Rental Calendar**
The Rental Calendar defaulted from Rental Management Setup.

A screenshot of a web form. It shows a dropdown menu with 'PS' selected. Below it is a text input field with '0.00'. Further down, there are two rows with the value '4,080.00'. A red box highlights a dropdown menu labeled 'RENTAL'. Below this, there is a 'No' button and two rows with the text 'Mountain Standard Time'.

Click on the button **Show less**

A screenshot of a web form. At the top right, there are icons for 'SAVED', a bookmark, a share icon, and a print icon. Below these is a blue circular icon with a question mark. The form contains several input fields. One field has a date value of '6/28/2020'. At the bottom right, there is a summary row with the value 'PS'. A red box highlights a button labeled 'Show less' on the right side of the form.

Click on the cell **Rental Unit No.**

A screenshot of a table with the following structure:

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→			

The first cell in the first row of the table body is highlighted with a red box. Above the table, there are tabs labeled 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. Below the table, there are more tabs labeled 'Sales Lines', 'Manage', 'Line', and 'Fewer options'.



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Fewer options
	Rental Unit No.	Standard Text Code	Description				Rental Terms Code
→	<input type="text" value="RU00011"/>						

Click on the link in cell **No.** with the value **RU00011**

Contract · RC00015

Contract Rental Actions Navigate

Customer Name Address

Date

RENTAL UNIT LIST

No. ↑	Description
RU00010-0...	Framing Air Nailer
RU00010-0...	Framing Air Nailer
RU00011	Power Shovel Group
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

Manage								Line	Functions	Fewer options
	Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code			
⋮		Power Shovel Group	<input type="text" value="MONTH"/>	0						

Click on the lookup button in the cell **Rental Terms Code**

Line								Functions	Fewer options
	Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1		
		Power Shovel Group	<input type="text" value="MONTH"/>	0					



ODT Rentals Online Help

Click on the link in cell **Code** with the value **DAY-PEND**

Standard Item Code	Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1
	Power Shovel Group	MONTH-	0			
		<div><div>Code</div><div>Description</div><div>DAY-END-OPT</div><div>Daily Rental for Optimized E</div><div>DAY-END-OPT-TIME</div><div>Daily Rental for Optimized E</div><div>DAY-PEND</div><div>Daily Rental - Per. Billing in</div><div>DAY-P</div><div>Select record "DAY-PEND"</div><div>DAY-PSTART</div><div>Daily Rental - Per. Billing in</div><div>DAY-START</div><div>Daily Rental for Billing at Sta</div><div>+ New</div></div>				
Line	Fewer options					
Description						
			0			0.00 ✖

Click on the cell **Rental Quantity** with the value **0**

e Functions Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Term Code
Power Shovel Group	AY-PEND	0				
Fewer options						

Enter the text **1**.

Functions Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Term Code
Power Shovel Group	DAY-PEND	<div><div></div><div>1</div></div>				
Fewer options						

Click on the cell **Location Code**

ons Fewer options							
on	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Ren Date
Shovel Group	DAY-PEND						6/24
options							



Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Group	DAY-PEND	1	<input type="text" value=""/>				6/28/2020
Group	DAY-PEND	1	<input type="text" value="Initial reading."/>				
			<input type="text" value="CENTRAL"/>				Central Warehouse
			<input type="text" value="EAST"/>				East Warehouse
			<input type="text" value="RENTRESERV"/>				Inventory Items Rental Rese
			<input type="text" value="SOUTH"/>				South Warehouse
			<input type="text" value="TEMP"/>				Temporary Location
			<input type="text" value="+ New"/>				New Warehouse

Click on the cell **Rental Return Date** with the value **6/28/2020**

Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price
<input type="text" value=""/>			6/28/2020	<input type="text" value="6/28/2020"/>	400.00	0.00	0.00
			6/28/2020	6/28/2020	400.00	0.00	0.00

Click on the link in cell **Rental Return Date** with the value **6/28/2020**

Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price
			6/28/2020	<input type="text" value="6/28/2020"/>	400.00	0.00	0.00
			6/28/2020	6/28/2020		0.00	0.00

Click on a date in the calendar

Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
		6/28/2020	<input type="text" value="6/28/2020"/>	400.00	0.00	0.00	0.00
		6/28/2020			0.00	0.00	0.00

July 2020

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Go to today Done

Tax Group Code	Line Amount Excl. Tax	Including Tax	Line Discount %	Currency Code	Qty. to Ship
*	0.00	0.00	0		0



Click on the cell **Standby Unit Price** with the value **0.00**

Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Code
6/28/2020	7/7/2020	400.00	0.00	0.00	0.00		SU
6/28/2020	6/28/2020	400.00	0.00	0.00	0.00		SU

Enter the text **100.00**.

Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Code
6/28/2020	7/7/2020	400.00	100.00	0.00	0.00		SU
6/28/2020	7/7/2020	400.00	0.00	0.00	0.00		SU

Click on the cell **Rental Unit No.**

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00011		Power Shovel Group	DAY-PEND
		Power Shovel Group	DAY-PEND

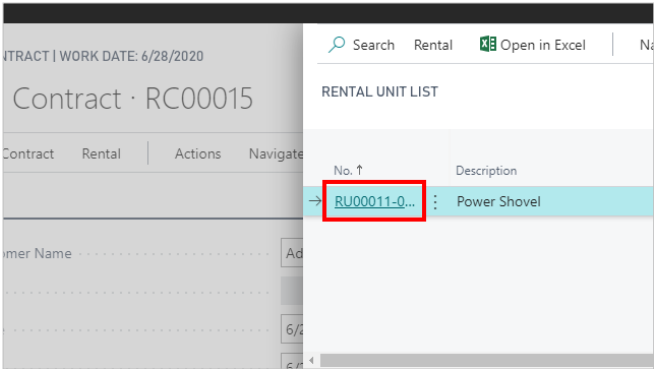
Click on the lookup button in the cell **Rental Unit No.**

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→ RU00011		Power Shovel Group	DAY-PEND
		Power Shovel Group	DAY-PEND

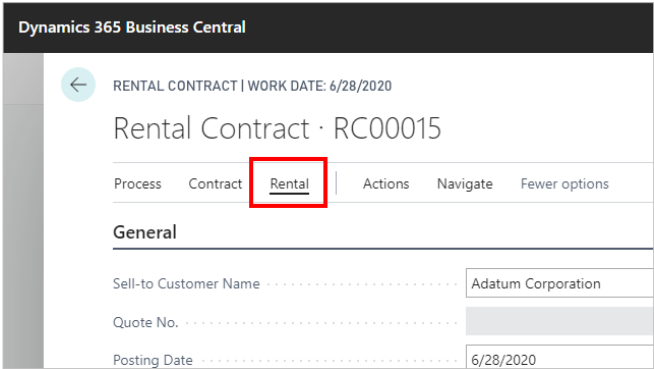


ODT Rentals Online Help

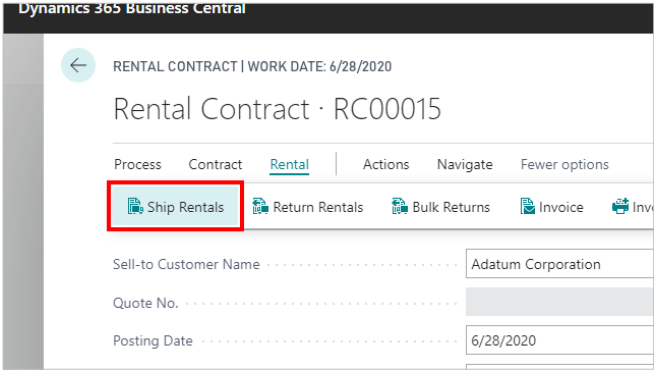
Click on the link in cell **No.** with the value **RU00011-003**



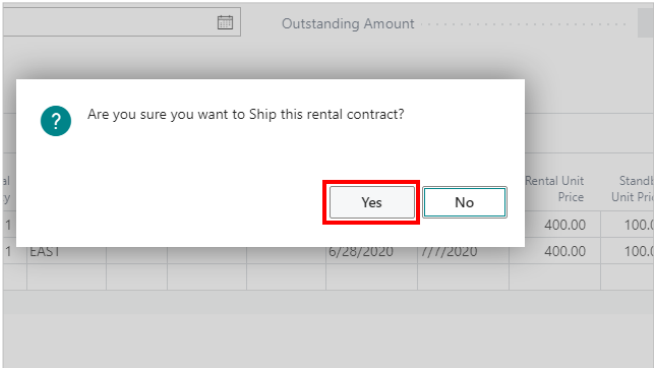
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



The following demonstrates how to access the rental calendar and to set days as Non-billable or to Use Standby Price.



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date	6/28/2020
Order Date	6/28/2020
Document Date	6/28/2020

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00022		Wacker Skid Steer Group	DAY-PEND
→ RU00022-001	:	Wacker Skid Steer	DAY-PEND

Click on the navigation menu item **View Rental Calendar**

Document Date	6/28/2020
---------------	-----------

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Amount Lines	Rental Value Entries	Metered Usage Entries
Rental Ledger Entries	View Rental Calendar	Periodic Usage Entries

→ RU00022-001	:	Wacker Skid Steer	DAY-PEND
---------------	---	-------------------	----------

Click on **Use Standby Price**

Check the Use Standby Price box on the record containing the date that the Standby Unit Price is to be charged to the customer.

Previous Period	Next Period	Open in Excel	Actions	Fewer options
-----------------	-------------	---------------	---------	---------------

Document No. ↑	Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑	Day ↑	Description
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/4/2020	Saturday	

Click on **Non-Billable**

Check the Non-Billable box on the record containing the date that the customer is not to be billed for.

Document Type ↑	Document No. ↑	Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑	Day ↑
Order	RC00015	20000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/28/2020	Sunday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/4/2020	Saturday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/5/2020	Sunday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/6/2020	Monday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/7/2020	Tuesday



ODT Rentals Online Help

Click on **Non-Billable**

Check the Non-Billable box on the record containing the date that the customer is not to be billed for.

Type ↑	No. ↑	Line No. ↑	Billable	Price	Date ↑	Day ↑
Order	RC00015	20000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/28/2020	Sunday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday
Order	RC00015	20000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/4/2020	Saturday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/5/2020	Sunday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/6/2020	Monday
Order	RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/7/2020	Tuesday

Click on **Use Standby Price**

Check the Use Standby Price box on the record containing the date that the Standby Unit Price is to be charged to the customer.

RC00015	20000	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/28/2020	Sunday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday	
RC00015	20000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday	
RC00015	20000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7/4/2020	Saturday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/5/2020	Sunday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/6/2020	Monday	
RC00015	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/7/2020	Tuesday	

Click on the button **Close**

<input type="checkbox"/>	7/2/2020	Thursday	<input type="checkbox"/>
<input type="checkbox"/>	7/3/2020	Friday	<input type="checkbox"/>
<input type="checkbox"/>	7/4/2020	Saturday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7/5/2020	Sunday	<input type="checkbox"/>
<input type="checkbox"/>	7/6/2020	Monday	<input type="checkbox"/>
<input type="checkbox"/>	7/7/2020	Tuesday	<input type="checkbox"/>
<div>Close</div>			

Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code
6/28/2020	7/7/2020	400.00	0.00	0.00	0.00		SUPPLIES
6/28/2020	7/7/2020	400.00	0.00	0.00	0.00		SUPPLIES

The following is a review of the Rental Amount Lines, which are used for billing the customer.

The review will show that the days with Use Standby Price checked in the calendar contain the Standby Unit Price entered on the Rental Line. And that the days with Non-Billable checked are not in the Rental Amount Lines, which means the customer will not be billed for those days.

Click on the navigation menu item popup **Line**

Posting Date	6/28/2020
Order Date	6/28/2020
Document Date	6/28/2020

Rental Lines	Manage	<div>Line</div>	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
RU00022		Wacker Skid Steer Group	DAY-PEND	
→ RU00022-001		Wacker Skid Steer	DAY-PEND	



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Order Date 6/28/2020

Document Date 6/28/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Value Entries | Metered Usage Entries

Rental Ledger Entries | View Rental Calendar | Periodic Usage Entries

→ RU00022-001 | Wacker Skid Steer | DAY-PEND

Click on the cell **Unit Price Excl. Tax** with the value **100.00**

Note that the Unit Price Excl. Tax contains the Standby Unit Price entered on the rental lines.

Download in Excel

RENTAL AMOUNTS

Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Current Code	Amount Including Tax	Tax Group Code
6/28 12:00 AM	6/28/2020 11:59 PM	1	100.00	100.00		102.00	SUPPLIES
6/29 12:00 AM	6/29/2020 11:59 PM	1	400.00	400.00		408.00	SUPPLIES
6/30 12:00 AM	6/30/2020 11:59 PM	1	400.00	400.00		408.00	SUPPLIES
7/1 12:00 AM	7/1/2020 11:59 PM	1	400.00	400.00		408.00	SUPPLIES
7/2 12:00 AM	7/2/2020 11:59 PM	1	400.00	400.00		408.00	SUPPLIES

Click on the cell **Billing Date** with the value **7/2/2020**

Note that there are no records in the Rental Amount Lines with a Billing Date for 7/3/2020 or 7/4/2020 which had Non-Billable checked in the calendar.

Line	Amount Excl. Tax	Current Code	Including Tax	Tax Group Code	Billing Date ↑	Billed
10	100.00		102.00	SUPPLIES	6/28/2020	<input checked="" type="checkbox"/>
20	400.00		408.00	SUPPLIES	6/29/2020	<input type="checkbox"/>
30	400.00		408.00	SUPPLIES	6/30/2020	<input type="checkbox"/>
40	400.00		408.00	SUPPLIES	7/1/2020	<input type="checkbox"/>
50	400.00		408.00	SUPPLIES	7/2/2020	<input type="checkbox"/>
60	100.00		102.00	SUPPLIES	7/5/2020	<input type="checkbox"/>
70	400.00		408.00	SUPPLIES	7/6/2020	<input type="checkbox"/>
80	400.00		408.00	SUPPLIES	7/7/2020	<input type="checkbox"/>

Click on the cell **Unit Price Excl. Tax** with the value **100.00**

Note that the Unit Price Excl. Tax contains the Standby Unit Price entered on the rental lines.

20 12:00 AM	6/28/2020 11:59 PM	1	100.00	100.00	102.00	SUPPLIES
20 12:00 AM	6/29/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES
20 12:00 AM	6/30/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES
20 12:00 AM	7/1/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES
20 12:00 AM	7/2/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES
20 12:00 AM	7/5/2020 11:59 PM	1	100.00	100.00	102.00	SUPPLIES
20 12:00 AM	7/6/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES
20 12:00 AM	7/7/2020 11:59 PM	1	400.00	400.00	408.00	SUPPLIES

Click on the button **Close**

400.00	408.00	SUPPLIES	7/2/2020	<input type="checkbox"/>
100.00	102.00	SUPPLIES	7/5/2020	<input type="checkbox"/>
400.00	408.00	SUPPLIES	7/6/2020	<input type="checkbox"/>
400.00	408.00	SUPPLIES	7/7/2020	<input type="checkbox"/>

Rental Start Date	Rental Return Date	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price	Currency Code	Tax Group Code
6/28/2020	7/7/2020	400.00	100.00	0.00	0.00		SUPPLIES
6/28/2020	7/7/2020	400.00	100.00	0.00	0.00		SUPPLIES

The following steps demonstrate the previewing of the Proforma Invoice based on the agreement with the customer that the invoicing would occur at the end of the contract.

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

Process Contract Rental Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/28/2020

Click on the navigation menu item **Print Proforma**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

Process Contract Rental Actions Navigate Fewer options

Print... **Print Proforma** Copy Document

Prepare to print the proforma invoice. A report request window for

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 6/28/2020

Click on the toggle field **Print Company Address**

Selected printer: (Browser)

Options

Number of Copies

Print Company Address ☒

Show Alternate Prices ☐

Show Rental Details ☒

Hide Periodic/Standby Us... .. ☐

Cut-off Date 6/28/2020

ODT Rentals Online Help

Click on the field **Cut-off Date**


Number of Copies 0

Print Company Address ☒

Show Alternate Prices ☐


Show Rental Details ☒

Hide Periodic/Standby Us... ☐

Cut-off Date 6/28/2020 

Type the date in the format M/d/yy

Filter: Rental Contract

× Document Type Rental Contract 

× No. RC00015

Click on the link **Open the date picker**

ies 0


Address ☒

Prices ☐

tails ☒

andBy Us... ☐

5/28/2020



Contract

pe Rental Contract

BC00015

Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price	Ur
400.00	100.00	0.00	
100.00	100.00	0.00	

Click on the link **Next**

any Address ☒


ate Prices ☐

il Details ☒

ic/Standby Us... ☐

e ☐

Rental Contract

Contract Dates 6/28/2020 to 7/2/2020 

June 2020

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

nt Type ☐

Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price
400.00	100.00	0.00
400.00	100.00	0.00

Click on a date in the calendar

Show Rental Details ☒

Hide Periodic/Standby Us... .. ☐

Cut-off Date

Filter: Rental Contract

- × Document Type
- × No.
- × Sell-to Customer No.
- × Bill-to Customer No.



Click on **Send to... Print Preview Cancel**

× Bill-to Customer No.
× Ship-to Code
+ Filter...
Filter: Rental Additional Note
Send to... Print Preview Cancel

Click on the button **Preview**

× Bill-to Customer No.
× Ship-to Code
+ Filter...
Filter: Rental Additional Note
Send to... Print Preview Cancel

The following picture is of the Proforma Invoice.

The total number of days from the Rental Start Date to the Rental Return Date, which was entered in the Cut-off Date field is 10 days.

Note that on the Proforma Invoice there are 2 days at the Standby Price and 6 days at the Rental Unit Price for a total of 8 days, as there were 2 days marked as Non-billable in the calendar.

CROWNUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Rental Proforma
Page: 1
Rental Contract Number: RC00015
Rental Proforma Date: 7/7/2020

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number: 10000
Customer ID: Peter Sadow
SalesPerson: Peter Sadow
Ship Via: 1 Month/2% 8 days
Terms:

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00011	Power Shovel Group	PS-003	1		
RU00011-003	Power Shovel		1		2,600.00
	Rental		2 @ 100.00/ Daily Rental = 200.00		
			6 @ 400.00/ Daily Rental = 2,400.00		

Amount Subject to Sales Tax USD: 2,600.00
Amount Exempt from Sales Tax USD: 0.00

Subtotal: 2,600.00
Total Sales Tax: \$2.00
Total USD: 2,652.00

The following steps demonstrate the invoicing and return of the rental units.



ODT Rentals Online Help

Click on the field **Posting Date**

Actions Navigate Fewer options

Adatum Corporation

6/28/2020

6/28/2020

6/28/2020

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

6/28/2020

June 2020

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

Click on a date in the calendar

er Name

Adatum Corporation

6/28/2020

July 2020

5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Go to today

Done

Manage Line Functions

Standard Text Code Description Rental Terms Code Rental Quantity Location Code Bin Code



ODT Rentals Online Help

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/7/2020

Click on the navigation menu item **Invoice**

Optionally the Invoice and Print can be selected.

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

Contract **Rental** Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

Posting Date 7/7/2020

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

	Rental Unit Price	Standby Unit Price
1 EAST	400.00	100.00

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price
1 EAST	400.00	100.00	0.00



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

Line	Item	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc...	Return Location Code	Re Da Bill
00	SUPPLIES	0	0	0	0	0		
00	SUPPLIES	0	1	0	0	0		

Enter the text **1**.

Line	Item	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc...	Return Location Code	Re Da Bill
00	SUPPLIES	0	0	0	0	0		
00	SUPPLIES	0	1	1	0	0		

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

ProcessContractRentalActionsNavigateFewer options

General

Sell-to Customer NameAdatum Corporation

Quote No.

Posting Date7/7/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00015

ProcessContractReturnRentalsActionsNavigateFewer options

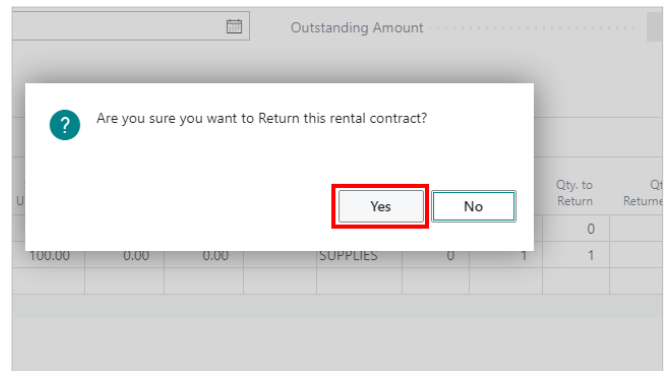
Ship RentalsReturn RentalsBulk ReturnsInvoiceInv

Sell-to Customer NameAdatum Corporation

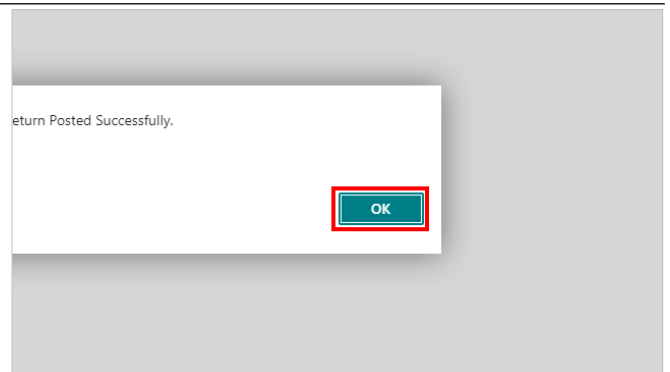
Quote No.

Posting Date7/7/2020

Click on the button **Yes**



Click on the button **OK**



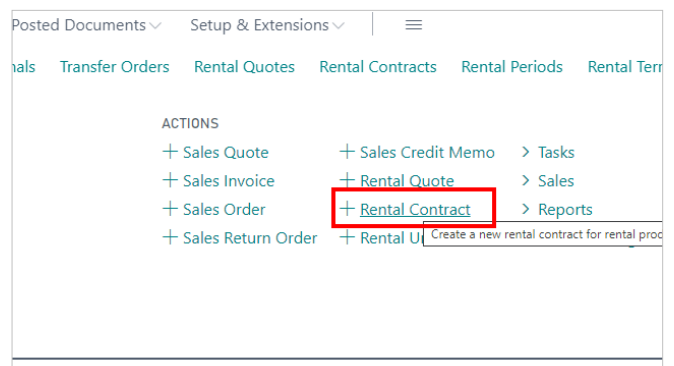
4.5.2.3. How to Process a Contract with a Prorated Rental Term

The following example demonstrates the use of the Rental Custom Calendar, when the Rental Term on the contract rental line has the Prorate field set to All Periods, and a has Period Code of Week for billing at a weekly rate.

In the example, the calendar has been setup on Rental Management Setup. Therefore the calendar defaults to the contract General tab.

The setting of some days as non-billable will be demonstrated. A review of the rental amount lines is included to show that the pricing is prorated to exclude billing the days marked as Non-billable.

Click on the navigation menu item **Rental Contract**





ODT Rentals Online Help

Click on the field **Sell-to Customer Name**

Click on the link in cell **No.** with the value **10000**

Click on the cell **Rental Unit No.**

Click on the lookup button in the cell **Rental Unit No.**



Click on the cell **Rental Quantity** with the value **0**

Functions Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Power Shovel Group	ND-PRO	0					

Enter the text **1**.

Functions Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Power Shovel Group	WEEK-PEN...	1					

Click on the cell **Location Code**

Functions Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Power Shovel Group	WEEK-PEN...	1					6/28/2020

Click on the link in cell **Code** with the value **EAST**

Functions Fewer options							
Description	Rental Terms Code	Rental Quantity	Location Code	Bin Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
Power Shovel Group	WEEK-PEN...	1					6/28/2020
Power Shovel Group	WEEK-PEN...	1					6/28/2020

items

accr

EAST

RENTRESERV

SOUTH

TEMP

WEST

+ New

Central Warehouse	East Warehouse	Inventory Items Rental Rese	South Warehouse	Temporary Location	West Warehouse
-------------------	----------------	-----------------------------	-----------------	--------------------	----------------



Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code		
→ RU00011		Power Shovel Group	WEEK-PEN...		
		Power Shovel Group	WEEK-PEN...		

Sales Lines		Manage	Line	Fewer options
-------------	--	--------	------	---------------

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code		
RU00011		Power Shovel Group	WEEK-PEN...		
→		Power Shovel Group	WEEK-PEN...		

Sales Lines		Manage	Line	Functions	Fewer options
-------------	--	--------	------	-----------	---------------

Click on the link in cell **No.** with the value **RU00011-003**

TRACT | WORK DATE: 7/7/2020				Search		Rental	Open in Excel	N
Contract · RC00016				RENTAL UNIT LIST				
Contract		Rental	Actions	Navigate				
		No. ↑		Description				
→		RU00011-0...		Power Shovel				
Customer Name				Ad				
				6/2				
				6/2				

Click on the navigation menu item popup **Line**

Posting Date	6/28/2020
Order Date	6/28/2020
Document Date	6/28/2020

Rental Lines	Manage	<u>Line</u>	Functions	Fewer options
Rental Unit No.	Standard Text Code	Description	Rental Terms Code	
RU00011		Power Shovel Group	WEEK-PEN...	
→ RU00011-C	:	Power Shovel	WEEK-PEN...	



Click on the navigation menu item **View Rental Calendar**

Document Date 6/28/2020

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Value Entries | Metered Usage Entries

Rental Ledger Entries | **View Rental Calendar** | Periodic Usage Entries

→ RU00011-003 | Power Shovel | WEEK-PEN...

Click on **Non-Billable**

In the agreement with the customer, they will not be billed for statutory holidays. As this example is in a USA company, July 4 is a statutory holiday.

LENDAR ENTRIES						
Document Type ↑	Document No. ↑	Document Line No. ↑	Non-Billable	Use Standby Price	Date ↑	Day ↑
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/28/2020	Sunday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/29/2020	Monday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	6/30/2020	Tuesday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/1/2020	Wednesday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/2/2020	Thursday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/3/2020	Friday
Order	RC00016	20000	<input type="checkbox"/>	<input type="checkbox"/>	7/4/2020	Saturday

Click on the button **Close**

<input type="checkbox"/>	6/29/2020	Monday	<input type="checkbox"/>
<input type="checkbox"/>	6/30/2020	Tuesday	<input type="checkbox"/>
<input type="checkbox"/>	7/1/2020	Wednesday	<input type="checkbox"/>
<input type="checkbox"/>	7/2/2020	Thursday	<input type="checkbox"/>
<input type="checkbox"/>	7/3/2020	Friday	<input type="checkbox"/>
<input type="checkbox"/>	7/4/2020	Saturday	<input type="checkbox"/>

Close

The following contains a review of the Rental Amount Line for the contract to show that the billing to the customer not be for the full week.

Click on **Rental Unit No. = RU00011-003, Rental Terms Code = WEEK-PEND-PRO, Rental Quantity = 1**

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00011		Power Shovel Group	WEEK-PEN...
→ RU00011-003		Power Shovel	WEEK-PEN...

Sales Lines | Manage | Line | Fewer options



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date	6/28/2020
Order Date	6/28/2020
Document Date	6/28/2020

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
RU00011		Power Shovel Group	WEEK-PEN...
→ RU00011-003	:	Power Shovel	WEEK-PEN...

Click on the navigation menu item **Rental Amount Lines**

Order Date	6/28/2020
Document Date	6/28/2020

Rental Lines	Manage	Line	Functions	Fewer options
--------------	--------	-------------	-----------	---------------

Rental Amount Lines	Rental Value Entries	Metered Usage Entries
Rental Ledger Entries	View Rental Calendar	Periodic Usage Entries

→ RU00011-003	:	Power Shovel	WEEK-PEN...
---------------	---	--------------	-------------

Click on the cell **Extended Quantity** with the value **0.85714**

The Extended Quantity has been prorated in order to bill the customer for only 6 days. The quantity is calculated as 6 divided by 7 to equal 0.85714.

h Open in Excel							
NTAL LINE RENTAL AMOUNTS							
	Starting Date-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre... Code	Amo Includ
:	6/28/2020 12:00 AM	7/4/2020 11:59 PM	0.85714	2,500...	2,142.86		2,185

Click on the cell **Unit Price Excl. Tax** with the value **2,500.00**

Note that the Unit Price Excl. Tax contains the Rental Unit Price from the Rental Line.

in Excel							
ENTAL AMOUNTS							
	ate-Time ↑	Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre... Code	Amount Including Tax
	20 12:00 AM	7/4/2020 11:59 PM	0.85714	2,500.00	2,142.86		2,185.72
							SL



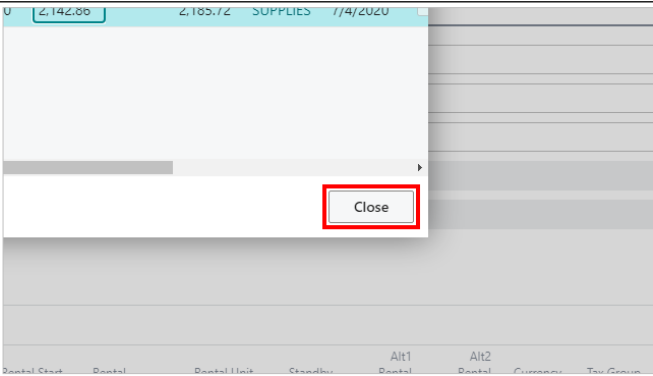
ODT Rentals Online Help

Click on the cell **Line Amount Excl. Tax** with the value **2,142.86**

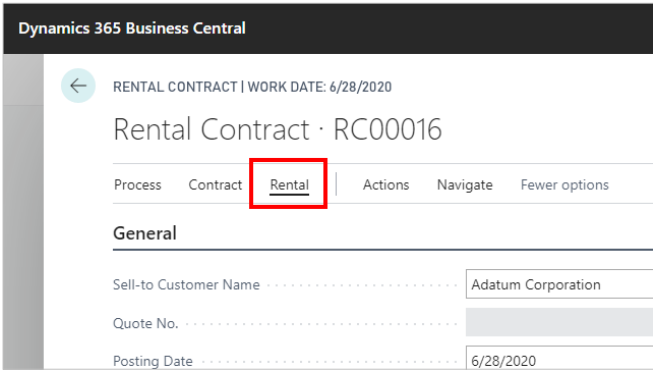
The Line Amount Excl. Tax is calculated as the Extended Quantity times the Unit Price Excl. Tax (2,500.00 x 0.85714 = 2,142.86). Thus billing to the customer is reduced by the 1 day.

Ending Date-Time ↑	Extended Quantity	Unit Price Excl. Tax	Line Amount Excl. Tax	Curre... Code	Amount Including Tax	Tax Group Code	Billi... ↑
7/4/2020 11:59 PM	0.85714	2,500.00	2,142.86		2,185.72	SUPPLIES	7/4

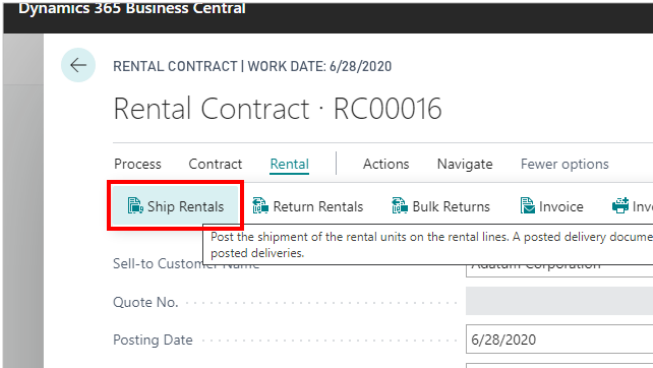
Click on the button **Close**



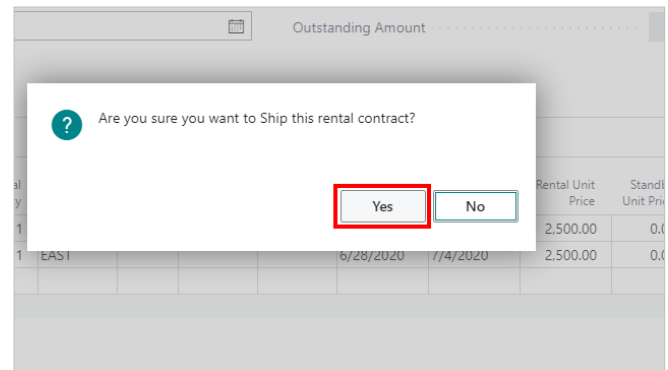
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



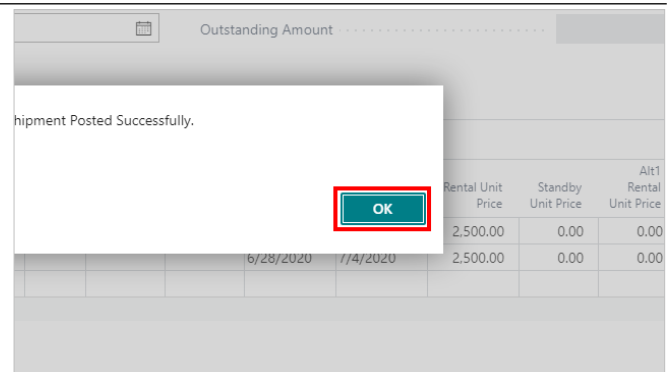
Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

Rental Unit	Price	Standby Unit Price
2,500.00	0.00	
2,500.00	0.00	

Click on the button **OK**

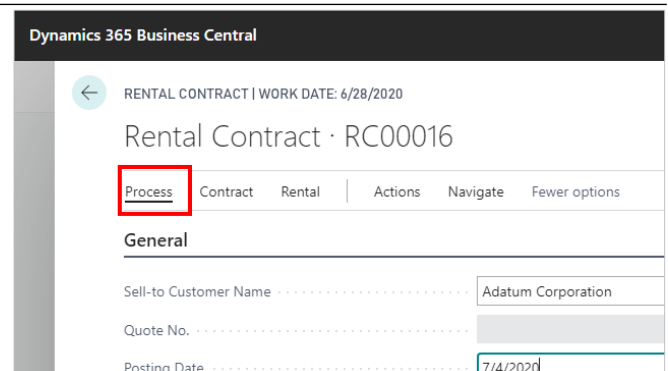


Shipment Posted Successfully.

OK

Rental Unit	Price	Standby Unit Price	Alt1 Rental Unit Price
2,500.00	0.00	0.00	
2,500.00	0.00	0.00	

Click on the navigation menu item popup **Process**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00016

Process Contract Rental Actions Navigate Fewer options

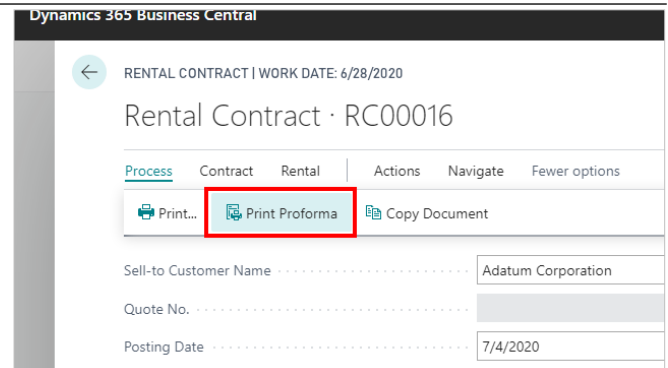
General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/4/2020

Click on the navigation menu item **Print Proforma**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00016

Process Contract Rental Actions Navigate Fewer options

Print... Print Proforma Copy Document

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/4/2020



Click on the field **Cut-off Date**

Click on the link **Open the date picker**

Click on the link **Next**

Click on a date in the calendar



ODT Rentals Online Help

Click on **Send to... Print Preview Cancel**

Select the option of Send to, Print or Preview to review the Proforma Invoice.

Filter: Rental Contract

× Document Type	Rental Contract
× No.	RC00016
× Sell-to Customer No.	
× Bill-to Customer No.	
× Ship-to Code	

Send to...

Print

Preview

The following picture shows how the Proforma Invoice prints the pricing when days are flagged as Non-Billable when the term has the Prorate field set to, All Periods.

CRONUS Rentals, Inc.
7122 South Ashford Street
Westminster
Atlanta, GA 31772

Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number
Customer ID
SalesPerson
Ship Via
Terms

10000
Peter Sadow
1 Month/2% 8 days

Rental Proforma

Page: 1
Rental Contract Number: RC00016
Rental Proforma Date: 7/4/2020

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00011	Power Shovel Group		1		
RU00011-003	Power Shovel	PS-003	1		
Rental	Jun 28, 2020 to Jul 04, 2020		0.85714 @ 2,500.00/ Weekly Rental =	2,142.86	

Amount Subject to Sales Tax USD 2,142.86
Amount Exempt from Sales Tax USD 0.00

Subtotal: 2,142.86
Total Sales Tax: 42.86
Total USD: 2,185.72

The following demonstrates the posting of the invoice.

Click on the field **Posting Date**

Actions

Navigate

Fewer options

Adatum Corporation

6/28/2020

6/28/2020

6/28/2020



ODT Rentals Online Help

Click on the link **Open the date picker**

ons

on

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link **Next**

Adatum Corporation

6/28/2020

June 2020

Su Mo Tu We Th Fr Sa

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Functions

Click on a date in the calendar

Adatum Corporation

6/28/2020

July 2020

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Go to today Done

Description Rental Terms Code Rental Quantity Location Code Bin Code Rental Terms Code Alt1 Rental Term

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00016

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/4/2020



Click on the navigation menu item **Invoice**

Contract | WORK DATE: 6/28/2020

Rental Contract · RC00016

Contract Rental Actions Navigate Fewer options

Rentals Return Rentals Bulk Returns **Invoice** Invoice and Print Posted

Customer Name Adatum Corporation

.....

Date 7/4/2020

.....

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Invoice this rental contract?

Yes No

	Rental Unit Price	Standby Unit Price
1	2,500.00	0.00
1 EAST	2,500.00	0.00
	6/28/2020	7/4/2020

Click on the button **OK**

Outstanding Amount

Invoice Posted Successfully.

OK

	Rental Unit Price	Standby Unit Price	Alt1 Rental Unit Price
	2,500.00	0.00	0.00
	6/28/2020	7/4/2020	
	2,500.00	0.00	0.00

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 6/28/2020

Rental Contract · RC00016

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 7/4/2020



ODT Rentals Online Help

Click on the navigation menu item **Posted Invoices**

The screenshot shows the top navigation bar with icons for edit, add, and delete. Below it, the 'Posted Invoices' menu item is highlighted with a red box. The interface also includes fields for 'External Document No.', 'Rental Terms Code', and 'Deposit Amount'.

Click on the cell **Amount** with the value **2,142.86**

	Currency Code	Due Date	Amount	Amount Including Tax	Remaining Amount
Adatum Corporation		8/4/2020	2,142.86	2,185.72	2,185.72

The Posted Rental Invoice can be saved, printed or previewed by selecting **Actions**, then **Print Rental Invoice**.

Press the **Esc** key.

The screenshot shows the 'Adatum Corporation' customer record. The 'Robert Townes' contact name is highlighted with a red box. The interface includes tabs for 'Purchasing', 'Inventory', 'Posted Documents', and 'Setup & Extensions'.

The following demonstrates the returning of the rental unit to complete the rental contract.

Click on the cell **Qty. to Return** with the value **0**

	Currency Code	Tax Group Code	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Discount %	Return Location Code	Return Date
00		SUPPLIES	0	0	0	0	0		
00		SUPPLIES	0	1	0	0	0		



Enter the text **1**.

Line	Item	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Returned	Line Disc...	Return Location Code	Re Da
00	SUPPLIES	0	0	0	0	0		
00	SUPPLIES	0	1	0	0	0		

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 7/7/2020

Rental Contract · RC00016

Process

Contract

Rental

Actions

Navigate

Fewer options

Ship Rentals

Return Rentals

Bulk Returns

Invoice

Inv

Sell-to Customer Name

Adatum Corporation

Quote No.

Posting Date

7/4/2020

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

←

RENTAL CONTRACT | WORK DATE: 7/7/2020

Rental Contract · RC00016

Process

Contract

Rental

Actions

Navigate

Fewer options

Ship Rentals

Return Rentals

Bulk Returns

Invoice

Inv

Sell-to Customer Name

Adatum Corporation

Quote No.

Posting Date

7/4/2020

Click on the button **Yes**

Outstanding Amount

?

Are you sure you want to Return this rental contract?

Yes

No

Qty. to Return

Qty. Returned

0

0

0.00

0.00

0.00

0.00

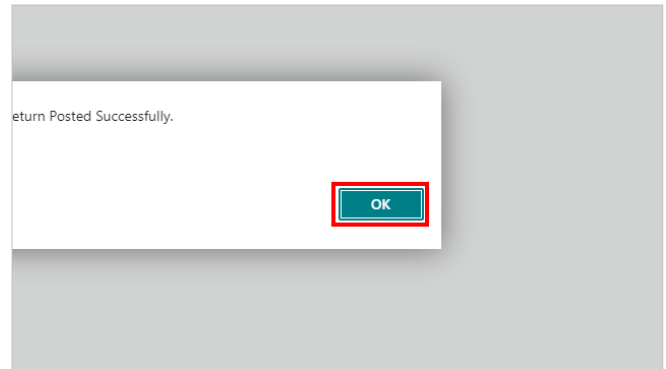
SUPPLIES

0

1

1

Click on the button **OK**



4.6. Sub-Contracting Rental Units

4.6.1. Sub Rentals Overview

4.6.1.1. Overview

Many rental businesses will source equipment from their suppliers or alternate suppliers if they do not have enough equipment on hand to meet the requirements of their customers. Their stated policy is never to say "no" to a customer.

The Rentals Sub Rental feature limits the use of sub rentals to units assigned to groups. Thus, units not assigned to groups cannot be sub rentals, and cannot be units linked to items as these cannot be assigned to a group unit. Sub Rental units will inherit pricing from the Rental Unit Group record.

The Sub Rental can be entered an unlimited number of times on one or multiple contracts, which enables some useful automation. Vendor Purchase Orders can be automatically created from the Rental Contract, when Sub Rental Units are used within a group on the lines. Users can as well open the PO's created directly from the contract.

A Sub Rental Worksheet provides a quick and easy way to determine what sub contracted units are out on rent or have been returned to your organization. Multiple Purchase Orders per Vendor for a single contract or multiple contracts can be automatically created from the worksheet. The worksheet also provides a means to specify whether a sub rented product has been returned to the vendor.

The Purchase Order created for Sub Rentals provides functionality enabling the invoicing of the PO Line multiple times. In essence making the lines recurring.

To learn about processing Sub Rental Purchase Orders, please review How to Process the Sub Rental Purchase Orders.

4.6.2. How to Set Up Sub Rentals

4.6.2.1. Overview

In the General Posting Setup, the Sub Rental Purchase Acc. No. field must have the G/L Account specified for each applicable combination of General Business Posting Group and General Product Post Group where Sub Rentals may occur. The G/L Account would be an expense account where the cost of sub renting a product to be used in rentals would be charged to.

The next step is to setup one Sub Rental unit card for every group.

To add a Sub Rental Unit to a contract line, users can run the Create Sub Line to automatically populate the Rental Unit No. field.

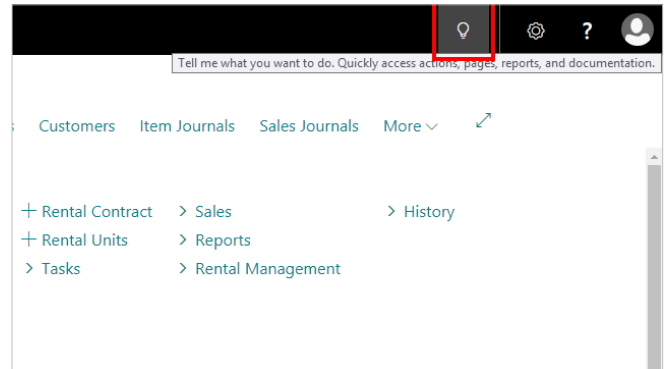
A Location Code will need to be entered on the Rental Line with the Sub Rental Unit.

4.6.2.2. How to Update General Posting Setup for Sub Rentals

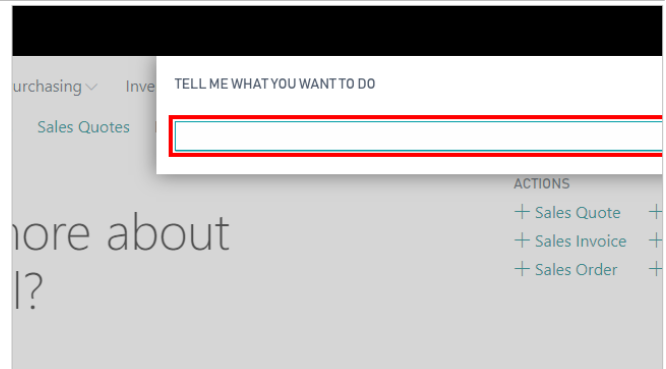
An existing G/L Account can be used should one exist for sub-contracted rental product or a new account can be created to differentiate the expense of sub-contracting rental product from other expenses.

In this example, a pre-existing account will be used, which exists in the CRONUS USA, Ltd. company as this is the company used to create this example.

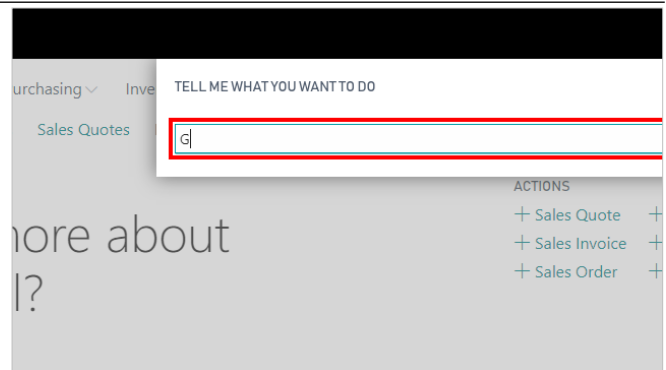
Click on the link



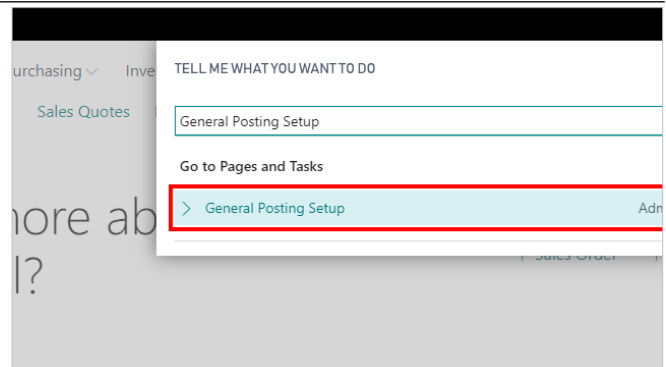
Click on the field **Type to start search:**



Enter **Type to start search:**



Click on **General Posting Setup Administration**



Click on the cell **Gen. Bus. Posting Group**

Select a record which already has the Rental Revenue and fi applicable, Damage Waiver Revenue G/L Accounts configured.

GEN. BUS. POSTING GROUP	GEN. PROD. POSTING GROUP	DESCRIPTION
	NO TAX	
	RETAIL	
DOMESTIC	NO TAX	
DOMESTIC	RETAIL	
DOMESTIC	SERVICES	

Click on the cell **Sub Rental Purchase Acc. No.**

PURCHASE VARIANCE ACCOUNT	RENTAL ACCOUNT	DAMAGE WAIVER ACCOUNT	SUB RENTAL PURCHASE ACC. NO.
	40100	40100	

Click on **No. = 50100, Name = Cost of Materials, Income/Balance = 0**

Select the G/L Account that the sub-contracting cost is to be posted to.

50100	50100	10700	10700		
50100	50100	10700	10700		
50100	50100	10700	10700	40100	40
50200	50100	10700			

NO.	NAME	IN
40990	TOTAL INCOME	In
50001	COST OF GOODS SOLD	In
50100	Cost of Materials	In
50200	Cost of Labor	In
Select record "50100"		
50300	Job Costs	In
50399	Job Costs Applied	In
+ New		

Repeat the steps for each record that rental G/L Accounts have been configured on, and to which sub-contracted rental product can occur on.

Click on the back button

Dynamics 365	Business Central	General Posting Setup
		←
		Back
		General Posting Setup
		Search + New Edit List Delete M
		GEN. BUS. POSTING GROUP
		GEN. PROD. POSTING GROUP
		PURCH. PMT. DISC. CREDIT ACC.
		PURCH. PMT. TOL. DEBIT ACC.
		NO TAX
		RETAIL
		DOMESTIC

4.6.2.3. How to Set Up a Rental Unit as a Sub Rental

For this example, the Rental Management Setup does not have the fields, Allow Unit Overbooking field set to Yes. The Location Mandatory is set to Yes. The Rental Unit Group in which the Sub Rental Unit will be created does have the Allow Overbooking field checked.

For this example, a Sub Rental Unit will be created for a Rental Unit Group, which has units that have varying locations.



Only one Sub Rental Unit will be setup for the group.

The Rental Unit Group in which the Sub Rental Unit will be created does have the Allow Overbooking field checked.

Profile - Business Manager

Click on the navigation menu item **Rental Unit**

Click on the field **No.**

When setting up a unit either the No. Series can be used, or the user can specify a No. that is indicative of what the unit is.

In this example, No. is being manually created and SUB is used at the beginning of the No.

Enter the text **SUB Buckeye.**

Click on the field **Description**



ODT Rentals Online Help

Enter the text **Sub Buckeye Ditcher**.

Process Rental Page Actions Navigate Less options

Copy Rental Unit...

General

No. SUB BUCKEYE ...

Description

Serial No.

Location Code

Posting

Click on the field **Location Code**
The specification of a Location Code on the card is optional as the Sub Rental could be from various locations. However, the Location Code must be specified on the Rental Lines when Location Mandatory is enabled on Rental Management Setup.

General

No. SUB BUCKEYE ...

Description Sub Buckeye Ditcher

Serial No.

Location Code

Posting

Gen. Prod. Posting Group

Tax Group Code

Click on the field **Gen. Prod. Posting Group**

Serial No.

Location Code EAST

Posting

Gen. Prod. Posting Group

Tax Group Code

Rental

Click on **Code = RETAIL, Description = Retail**

Posting

Gen. Prod. Posting Group

Tax Group Code

Rental

Group

Group No.

Sub Rental ☐

Allow Overbooking ☐

CODE	DESCRIPTION
NO TAX	Miscellaneous with
RETAIL	Retail
	Resources, etc.

+ New



Click on the field **Tax Group Code**

Location Code EAST

Posting

Gen. Prod. Posting Group RETAIL

Tax Group Code

Rental

Group ☐

Group No.

Click on **Code = SUPPLIES**, **Description = Taxable Olympic Supplies**

Tax Group Code

Rental

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

CODE	DESCRIPTION
FURNITURE	Taxable Olympic Fu
LABOR	Labor on Job
MATERIALS	Taxable Raw Mater
NONTAXABLE	Nontaxable
SUPPLIES	Taxable Olympic Su

+ New Select record "SUPPLIES"

Click on the field **Group No.**

Tax Group Code SUPPLIES

Rental

Group ☐

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code

Minimum Rental Duration

Click on the lookup button

SUPPLIES

☐ Group Qty. To Rent

☐ Group Qty. On Rent

☐ Look up value p Qty. To Return

☐ On Rent No

On Rent Doc. No.

Reservations Exist No



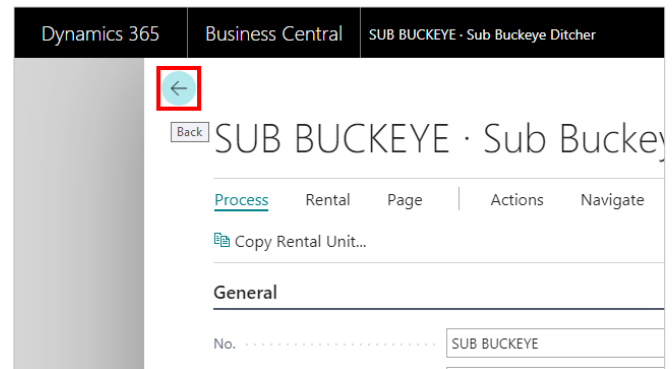
Click on the link in cell **No.** with the value **RU00001**

Click on **Sub Rental**

Click on the field **Minimum Rental Duration**

Enter the text **1 Day**.

Click on the back button



Repeat the above steps for each Rental Unit Group in which sub-rentals are to be allowed.

4.6.3. How to Create a Rental Contract Using a Sub Rental

4.6.3.1. Overview

The use of Sub Rentals requires the equipment reservation to be made using a Rental Unit Group record. Then when selecting the units to be shipped out, the user can choose to use a sub rental unit instead of a fleet unit. There are fields related to Sub Rentals, which are not shown by default on the Rental Lines of the contract.

The following fields are available to be added to the Rental Line by the user when the organization is using Sub Rentals. Two of the fields are mandatory. Users can choose where they want the fields to be located on the Rental Line.

Mandatory Fields:

The following fields are used when automatically creating the Purchase Order from the Rental Contract.

- **Vendor No.:** The Vendor No. field is used to specify the Vendor, which the sub-contract PO is to be created for.
- **Sub Rental Description:** This description is what will print on the Purchase Order Line.

Optional Fields:

- **Sub Rental:** This field, when checked by the system specifies that unit on the Rental Line is a Sub Rental Unit. This field cannot be edited by the user.
- **Vendor Name:** Displays the name of the vendor which was selected in the Vendor No. field.

- **Sub Rental Purch. Order No.:** This field is populated with the PO number, when the Create Sub Rental Purchase Order(s) is ran.

There are three options in the Rental Line command bar – Functions category.

- **Create Sub Line:** When this option is selected, then the Rental Unit No. field on the child line selected, will have the sub rental unit from the group automatically populated on the line. Thus, the end user does not have to know what the number of the sub rental unit is for that group.
- **Create Sub Rental Purchase Order(s):** Automatically creates a Purchase Order for one piece of equipment on this contract to be sourced from one supplier. The fields Vendor No. and Sub Rental Description must be populated. If not, an error will occur, and no purchase order will be created.
- **Open Sub Rental Purchase Order:** Opens the linked purchase order to allow the user to add any final details such as price, edit the description, and make sure the tax codes are correct.

4.6.3.2. How to Personalize the Rental Lines to Add Sub Rental

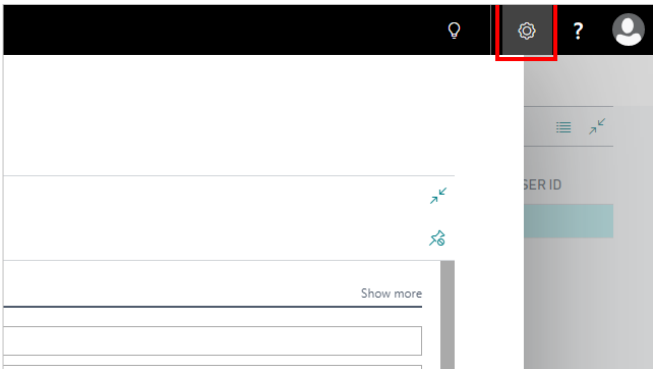


Fields

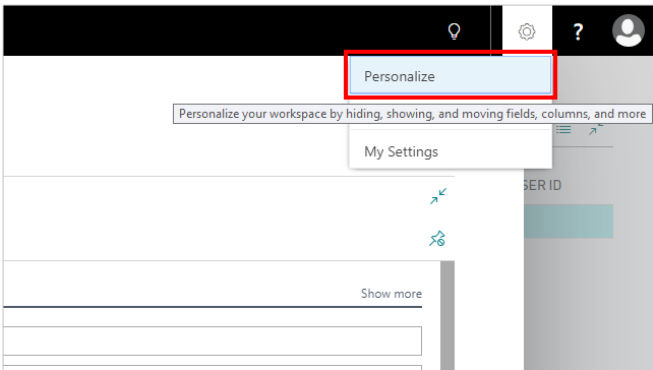
Profile - Sales Order Processor

The same steps apply to users having the Business Manager Profile.

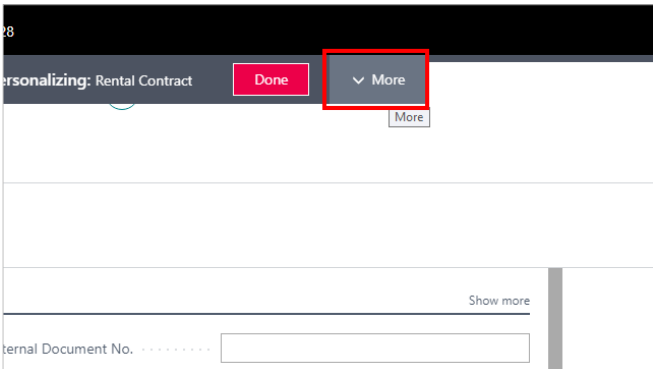
Click on the link **Settings**



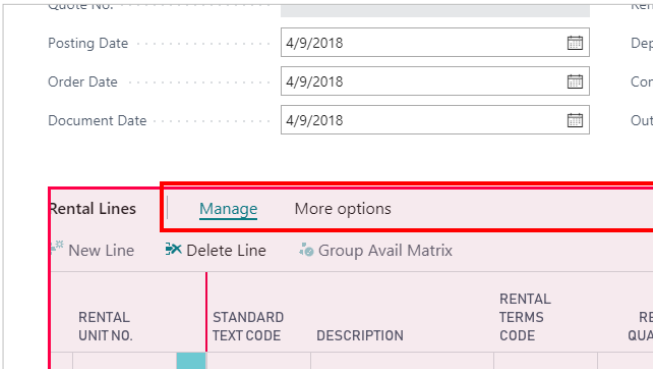
Click on the menu item **Personalize**



Click on the link **More**

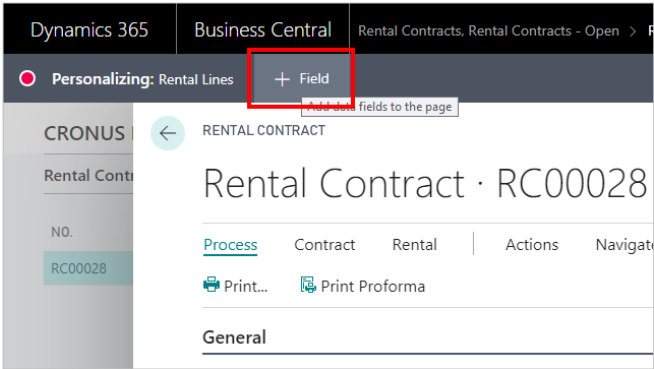


Click on **Manage** ☐ **More options**





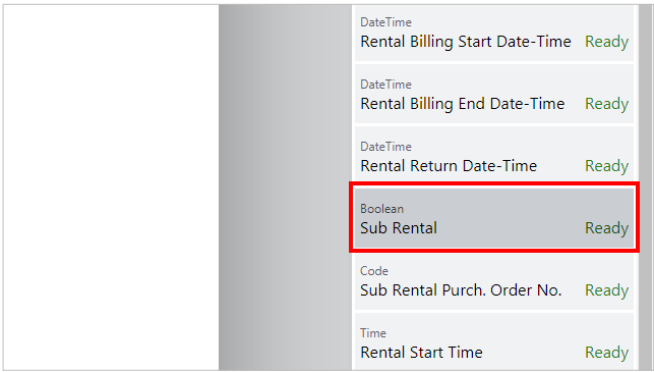
Click on the link **Field**



For the following fields, select the field and drag and drop it into the Rental Line to the location you would like the field to be in.

Click on the data brick **Caption = Sub Rental**

This field, when the box is checked, displays that the unit selected on the Rental Line is a Sub Rental unit.



Click on the data brick **Caption = Sub Rental Purch. Order No.**

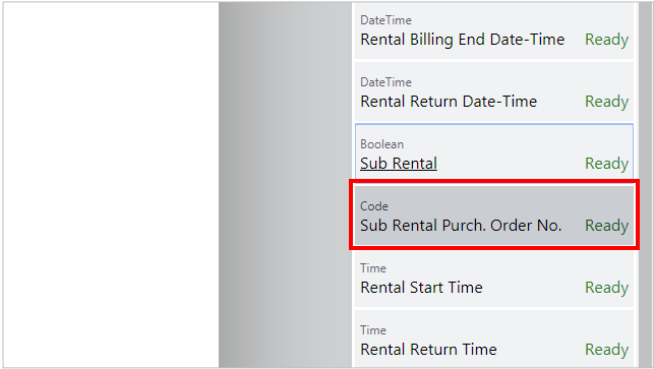
This field, when the PO is created automatically from the contract, displays the PO number.

NOTE

This field is mandatory as it is used in the function to automatically create the PO from the contract.

NOTE

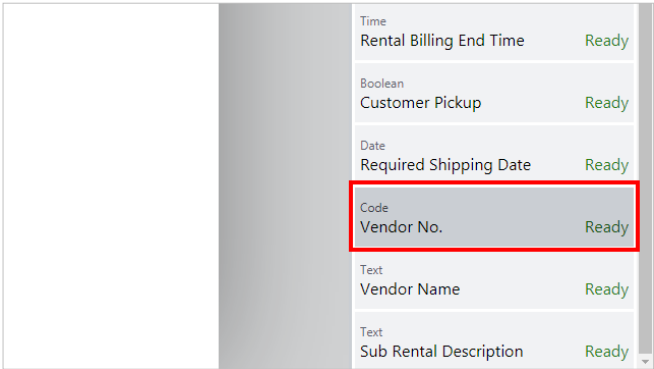
This field will also be populated if the PO has been created from the Sub Rental Worksheet.



Click and hold the left mouse button on the data brick **Caption = Vendor No.**

This field is mandatory as it is used in the function to automatically create the PO from the contract.

While holding down the left click on the mouse, drag and drop the field to the preferred location on the Rental Lines.



Click on the data brick **Caption = Vendor Name**

This field displays the Vendor Name once the Vendor No. has been selected on the Rental Line.

NOTE

This field will also be populated if the Vendor No. has been selected on the Sub Rental Worksheet.

Time	Rental Billing Start Time	Ready
Time	Rental Billing End Time	Ready
Boolean	Customer Pickup	Ready
Date	Required Shipping Date	Ready
Text	Vendor Name	Ready
Text	Sub Rental Description	Ready

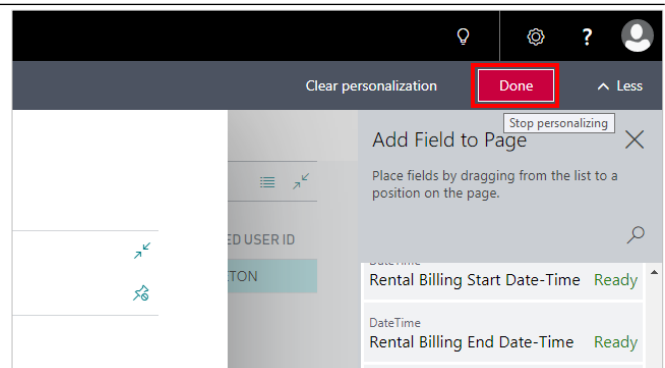
Click and hold the left mouse button on the data brick **Caption = Sub Rental Description**

This field is mandatory as it is used in the function to automatically create the PO from the contract.

While holding down the left click on the mouse, drag and drop the field to the preferred location on the Rental Lines.

Time	Rental Billing Start Time	Ready
Time	Rental Billing End Time	Ready
Boolean	Customer Pickup	Ready
Date	Required Shipping Date	Ready
Text	Vendor Name	Ready
Text	Sub Rental Description	Ready

Click on the link **Done**



4.6.3.3. How to Add a Sub Rental Unit on a Rental Contract

The following example demonstrates the process of entry of a group with the rental quantity set to two. One of the child lines will have a Sub Rental Line created, and the other child line will have an internal unit selected.

Then on the child line with the Sub Rental Unit, the Vendor No. and the Sub Rental Description will be populated, so that the function of Create Sub Rentals Purchase Order(s) can be ran. Once ran, the opening of the created PO will be demonstrated.

Click on the cell **Rental Unit No.**

Rental Lines	Manage	More options
New Line	Delete Line	Expand All
Collapse All		
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
Sales Lines	Manage	More options



Click on the lookup button in the cell **Rental Unit No.**
lookup button

Rental Lines

ManageMore options

New LineDelete LineExpand AllCollaps

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
	...	
Look up value		

Sales Lines

ManageMore options

Click on the link in cell **No.** with the value **RU00001**

Select the Rental Unit Group and complete the rental
line as follows.

NO.

RC0001

RENTAL UNIT LIST + New

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Quantity**

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PEND	0		

UNIT OF

Enter the text **2**.

More options

Group Avail Matrix

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-PEND	2		

UNIT OF



Click on the cell **Location Code**

s						
vail Matrix						
ON	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	R S D
tcher Group	MONTH-PEND					4/
UNIT OF						

Click on **Code = EAST, Name = East Warehouse**

RENTAL						
	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Group	MONTH-PEND	2	<div>▼</div>			4/9/2018

Click on the cell **Rental Unit No.**

Rental Lines

Manage

More options

New Line

Delete Line

Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
	:	Buckeye Ditcher Group
		Buckeye Ditcher Group

Click on the navigation menu item **More options**

Quote No.				
Posting Date		4/9/2018		
Order Date		4/9/2018		
Document Date		4/9/2018		
Rental Lines			Manage	More options
New Line			Delete Line	Reveal secondary actions
			Group Avail Matrix	
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION		RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group		MONTH-PEND



ODT Rentals Online Help

Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) | Line | **Functions** | Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTA QUANTIT
RU00001		Buckeye Ditcher Group	MONTH-PEND	

Click on the navigation menu item **Create Sub Line**

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | [Manage](#) | Line | [Functions](#) | Less options

Undo Shipment Rental Swap **Create Sub Line** Create Sub Rental P

Automatically populate the Rental Unit No. field c

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTA QUANTIT
RU00001		Buckeye Ditcher Group	MONTH-PEND	
		Buckeye Ditcher Group	MONTH-PEND	

Note that the Rental Unit No. field is automatically populated with the sub rental unit assigned to the group entered. The Location on the sub-rental line is set to the same location as on the group line.

The Location Code on the Sub Rental Unit Rental line must be entered when the Rental Group line and the Sub-Rental Unit card does not have a Location Code specified.

Complete the second child line by looking up and selecting an available unit in the group for the East location.

Click on the cell **Rental Unit No.**

Undo Shipment Rental Swap Create Sub Line

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
SUB BUCKEYE		Sub Buckeye Ditcher
		Buckeye Ditcher Group

Sales Lines | [Manage](#) | More options

Click on the lookup button in the cell **Rental Unit No.** lookup button

Undo Shipment Rental Swap Create Sub Line

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
SUB BUCKEYE		Sub Buckeye Ditcher
		Buckeye Ditcher Group

Look up value

Sales Lines | [Manage](#) | More options

ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00002**

RENTAL UNIT LIST + New		
NO.	DESCRIPTION	GROUP
BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
RU00006	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	Sub Buckeye Ditcher	<input type="checkbox"/>

4.6.3.4. How to Automatically Create a Sub Rental Purchase Order

Scroll to where the Sub Rental fields were add to the Rental Lines using the Personalize feature of Dynamics 365 Business Central.

Click on the cell **Sub Rental**

Note that the Rental Line with the Sub Rental Unit has the Sub Rental field checked.

LINE	RE... DAY	TRANSF... ORDER	PARTIAL RETURN DATE	SUB RENTAL	SUB RENTAL PURCH. ORDER NO.	VENDOR NO.
0	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
0	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
0	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
	<input type="checkbox"/>			<input type="checkbox"/>		

Click on the cell **Vendor No.**

Purchase Order					
PARTIAL RETURN DATE	SUB RENTAL	SUB RENTAL PURCH. ORDER NO.	VENDOR NO.	SUB RENTAL DESCRIPTION	
	<input type="checkbox"/>				
	<input checked="" type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				

Click on **No. = 10000, Name = Fabrikam, Inc., City = Atlanta**

Select the Vendor that the PO for the subcontracted product is to be rented from.

PARTIAL RETURN DATE	SUB RENTAL	SUB RENTAL PURCH. ORDER NO.	VENDOR NO.	SUB RENTAL DESCRIPTION
	<input type="checkbox"/>			
	<input checked="" type="checkbox"/>		<input type="text" value=""/>	
	<input type="checkbox"/>			
	<input type="checkbox"/>			
<div> <div>NO.</div> <div>NAME</div> <div>CT</div> </div>				
<div> <div>10000</div> <div>Fabrikam, Inc.</div> <div>At</div> </div>				
<div> <div>20000</div> <div>Select record "10000"</div> <div>Up Consultants</div> <div>Ch</div> </div>				
<div> <div>30000</div> <div>Graphic Design Institute</div> <div>Ch</div> </div>				
<div> <div>40000</div> <div>Wide World Importers</div> <div>At</div> </div>				
<div> <div>50000</div> <div>Nod Publishers</div> <div>At</div> </div>				
<div> <div>+ New</div> </div>				



Click on the cell **Sub Rental Description**

SUB RENTAL	SUB RENTAL PURCH. ORDER NO.	VENDOR NO.	SUB RENTAL DESCRIPTION
<input type="checkbox"/>			
<input checked="" type="checkbox"/>		10000	
<input type="checkbox"/>			
<input type="checkbox"/>			

Enter the text **Sub contracted Buckeye.**

Enter a description that should print on the PO line.

SUB RENTAL	SUB RENTAL PURCH. ORDER NO.	VENDOR NO.	SUB RENTAL DESCRIPTION
<input type="checkbox"/>			
<input checked="" type="checkbox"/>		10000	\$
<input type="checkbox"/>			
<input type="checkbox"/>			

Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | Manage | Line | **Functions** | Less options

Undo Shipment | Rental Swap | Create Sub Line | Create Sub Rental P

RENTAL UNIT NO.	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	DIS
RU00001	0	0	0	0	

Click on the navigation menu item **Create Sub Rental PO(s)**

4/9/2018

4/9/2018

Manage | Line | **Functions** | Less options

Rental Swap | Create Sub Line | **Create Sub Rental PO(s)** | Open Sub f

Automatically create a Purchase Order for

QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	DISCOUNT %	LINE DAY BIL...	TRA...	ORD NO.
0	0	0	0	0	<input checked="" type="checkbox"/>		
1	0	0	0	0	<input checked="" type="checkbox"/>		



ODT Rentals Online Help

Click on the button **OK**

nt No. is: RC00028

is: 20000

OK Cancel

al PO(s) Open Sub Rental Purchase Order

LINE	RE...	TRANSF...	PARTIAL	SUB	SUB RENTAL	
DISCOUNT %	DAY	ORDER	RETURN	RENTAL	PURCH. ORDER	VENDOR NO.
	BIL...	NO.	DATE		NO.	
0	<input checked="" type="checkbox"/>			<input type="checkbox"/>		

Click on the button **OK**

Contract Total

Outstanding Amount

to Rental PO's created.

OK

OK

LINE	RE...	TRANSF...	PARTIAL	SUB	SUB RENTAL	
DISCOUNT %	DAY	ORDER	RETURN	RENTAL	PURCH. ORDER	VENDOR NO.
	BIL...	NO.	DATE		NO.	
0	<input checked="" type="checkbox"/>			<input type="checkbox"/>		
0	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		10000

Click on the cell **Sub Rental Purch. Order No.** with the value **106005**

Note that the Sub Rental Purch. Order No. field is populated with the newly created PO.

Open Sub Rental Purchase Order

RE...	ODT	TRANSF...	PARTIAL	SUB	SUB RENTAL		
DAY	TRANSF...	ORDER	RETURN	RENTAL	PURCH. ORDER	VENDOR NO.	SUB RENTAL D
BIL...	NO.	NO.	DATE		NO.		
<input checked="" type="checkbox"/>				<input type="checkbox"/>			
<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	106005	0000	Sub contracted
<input checked="" type="checkbox"/>				<input type="checkbox"/>	106005		
<input type="checkbox"/>				<input type="checkbox"/>			

Click on the navigation menu item popup **Functions**

Quote No.

Posting Date 4/9/2018

Order Date 4/9/2018

Document Date 4/9/2018

Rental Lines | Manage | Line | **Functions** | Less options

Undo Shipment Rental Swap Create Sub Line Create Sub Rental P

RENTAL	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	DIS
UNIT NO.					
RU00001	0	0	0	0	



Click on the navigation menu item **Open Sub Rental Purchase Order**

Contract Total
Outstanding Amount

Less options

Sub Line Create Sub Rental PO(s) **Open Sub Rental Purchase Order**

View and edit the Purchase Order created for

QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	TRANSF... ORDER NO.	PARTIAL RETURN DATE	SUB RENTAL
0	0	0	<input checked="" type="checkbox"/>			<input type="checkbox"/>
0	0	0	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

Click on the cell **No.**

Note that the G/L Account selected in the General Posting Setup, Sub Rental Purchase Acc. No. field automatically populated the No. field.

Document Date 4/9/2018

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOC CODE
G/L Account	50100	Sub contracted Buckeye	

Inv. Discount Amount (U... 0.00 Total Tax (USD)

Click on the cell **Description**

Note that the PO line Description contains what was entered in the Sub Rental Description field on the Rental Line of the contract.

Document Date 4/9/2018

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE
G/L Account	50100	Sub contracted Buckeye	

Inv. Discount Amount (U... 0.00 Total Tax (USD)

Click on the button **Close**

Sub contracted Buckeye

Show more

Method Code --

Reference

Close

The functions of Undo Shipment and Swap Rental can be ran on Sub Rental Unit lines, should the need arise. To learn about processing Sub Rental Purchase Orders, please review How to Process Sub Rental Purchase Orders.

IMPORTANT NOTE:

Should a user select to delete a rental line with a Sub Rental Unit that is not shipped that the Sub Rental PO was created for a confirmation message will occur. When Yes is selected, then the Recurring field on the related PO line will be cleared. When No is selected, then the deletion of the rental line will not occur.

4.6.4. How to Use the Sub Rental Worksheet

4.6.4.1. Overview

A Sub Rental Worksheet is available, which contains a listing of all Sub Rental Units that have yet to be returned to the Vendor, whether the Rental Contract is open or is completed. The Sub Rental Worksheet is accessed via the Actions section – Rental Management menu option or from the top menu option of Rentals.

The worksheet provides users with information on the sub rentals and the ability to create the Sub Rental Purchase Orders for a single or multiple contract lines. A single PO can be created for multiple contracts when the Vendor No. is the same.

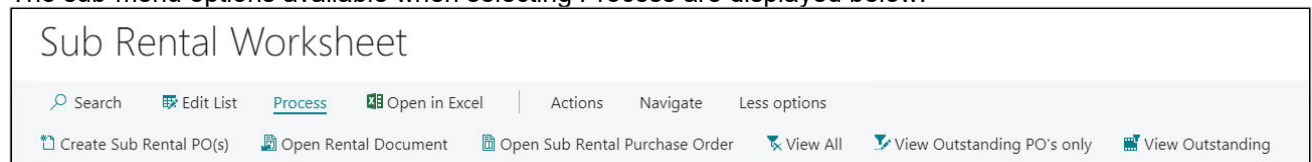
The worksheet contains a field called, "Returned to Vendor". The field must be checked when the return to the vendor has been completed. This is required to update the Rental Returned field on the Purchase Order line. And, if not checked the record will continue to be displayed by default on the worksheet lines.

Once the Returned to Vendor field has been checked, then the line will no longer be visible in the worksheet. However, users will be able to clear the filter, should they wish to view all sub-rentals lines.

For information on the fields on the lines, point to the column name.

4.6.4.2. Sub Rental Worksheet Command Bar Options

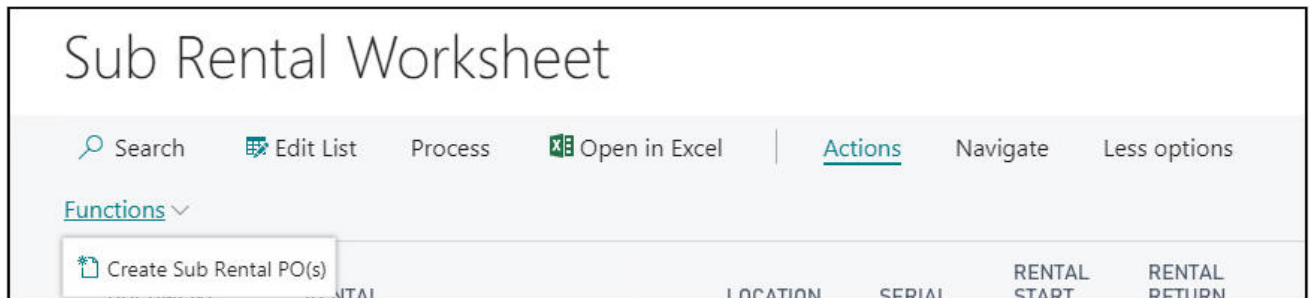
The sub-menu options available when selecting Process are displayed below.



The following provides a brief description of the options available in the command bar, Process option.

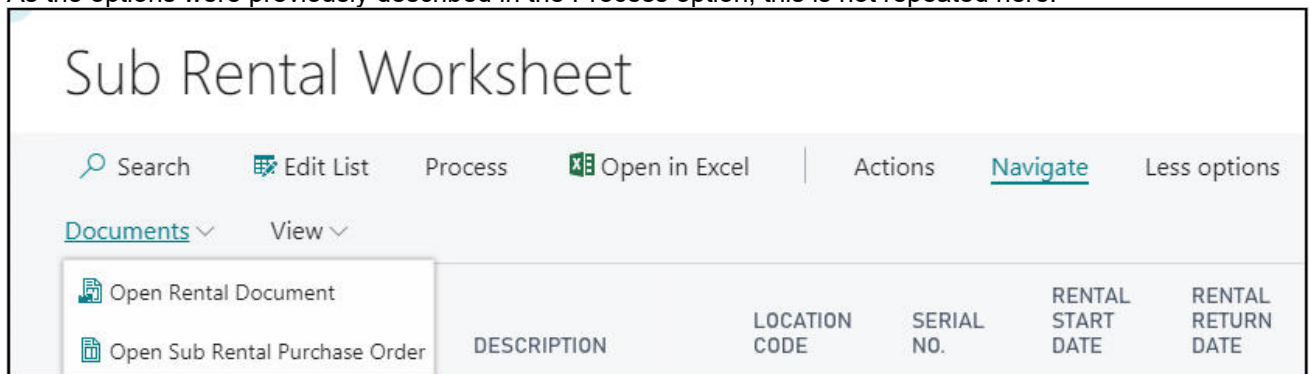
- **Create Sub Rental Purchase Order(s):** This option will create a PO's for the selected record(s), when the Vendor No. and the Sub Rental Description fields are populated on the record(s) selected.
- **Open Rental Document:** This option will open the Rental Contract for the line selected in the worksheet.
- **Open Sub Rental Purchase Order:** This option opens the PO of the line selected, when the SUB RENTAL PO NO. field is populated.
- **View All:** When selected the records displayed will consist of records for sub rentals that have not been returned to vendors, and those returned to vendors as long as the PO is still open.
- **View Outstanding PO's Only:** When selected the records in the worksheet are filtered to display only those records where the Sub Rental Purchase Orders are still open. The records displayed will include all records related to the open orders, whether the Returned to Vendor field is checked or not.
- **View Outstanding:** This option will filter the records in the worksheet to display only those open records where the Returned to Vendor field has not been checked and the PO is still open.

The command bar option of Action contains the sub-menu option of Functions which contains the option to Create Sub Rental Purchase Order(s), which is found in the Process option as well.



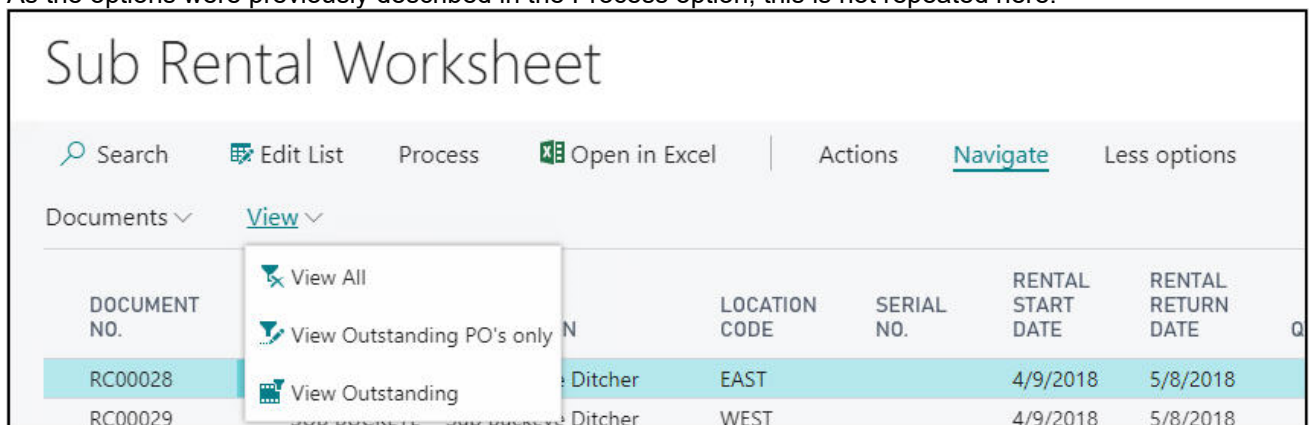
The following displays the options available when selecting the command bar option of Navigate - Documents.

As the options were previously described in the Process option, this is not repeated here.



The following displays the options available when selecting the command bar option of Navigate - View.

As the options were previously described in the Process option, this is not repeated here.



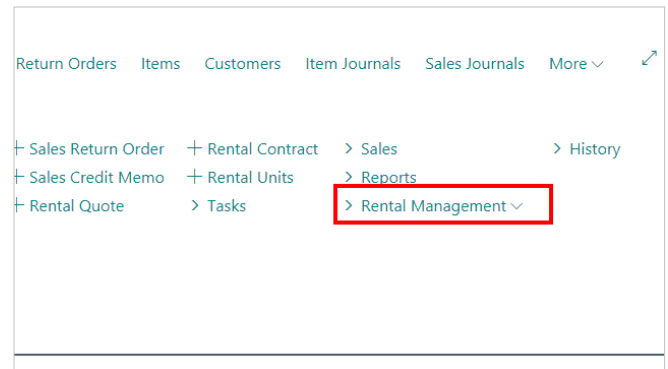
4.6.4.3. How to Create a Sub Rental PO from the Worksheet

The following example demonstrates opening the worksheet and creating multiple Purchase Orders from the worksheet for multiple lines and multiple contracts.

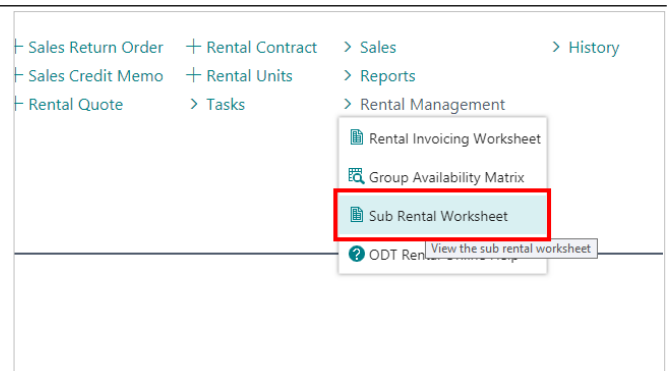


ODT Rentals Online Help

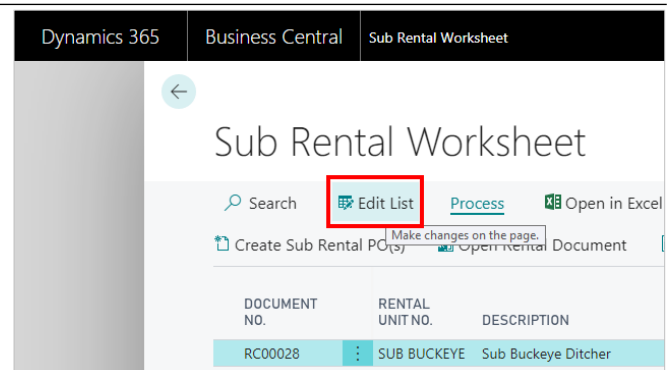
Click on the navigation menu item popup **Rental Management**



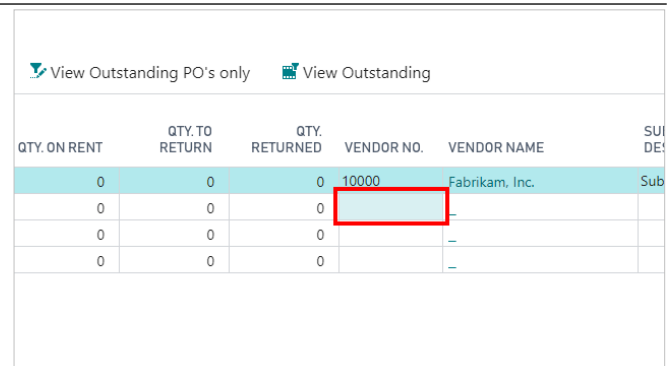
Click on the navigation menu item **Sub Rental Worksheet**



Click on the navigation menu item **Edit List**



Click on the cell **Vendor No.**





ODT Rentals Online Help

Click on **No. = 40000**, **Name = Wide World Importers**, **City = Atlanta**

Select the Vendor that the PO is to be created for.

0	0	0	10000	Fabrikam, Inc.	Sub con
0	0	0			
0	0	0			
0	0	0			
NO. NAME CI					
10000	:	Fabrikam, Inc.	At		
20000	:	First Up Consultants	Ch		
30000	:	Graphic Design Institute	Mi		
40000	:	Wide World Importers	At		
50	:	Select record "40000"	Publishers	At	
+ New					

Click on the cell **Sub Rental Description**

View Outstanding			
QTY. RND	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION
0	10000	Fabrikam, Inc.	Sub contracted
0	40000	Wide World Importers	
0			
0			

Enter the text **Sub contracted Buckeye West**.

View Outstanding			
R NO.	VENDOR NAME	SUB RENTAL DESCRIPTION	SU RE NC
	Fabrikam, Inc.	Sub contracted Buckeye	10
	Wide World Importers		

Click on the cell **Vendor No.**

View All View Outstanding PO's only View Outstanding						
QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	VENDOR NO.	VENDOR NAME	SU DE	
0	0	0	10000	Fabrikam, Inc.	Sub	
0	0	0	40000	Wide World Importers	ib c	
0	0	0				
0	0	0				



ODT Rentals Online Help

Click on **No. = 10000**, **Name = Fabrikam, Inc.**, **City = Atlanta**

Select the Vendor that the PO is to be created for.

QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION
0	0	0	10000	Fabrikam, Inc.	Sub contracted
0	0	0	40000	Wide World Importers	Sub contracted
0	0	0			
0	0	0			

NO.

NAME

CITY

10000

Fabrikam, Inc.

Atlanta

20000

Wide World Importers

Atlanta

30000

Graphic Design Institute

Midwest

40000

Wide World Importers

Atlanta

50000

Nod Publishers

Atlanta

+ New

Click on the cell **Sub Rental Description**

s only				
QTY. ON RENT	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION	SUB RENTAL DESCRIPTION
0	10000	Fabrikam, Inc.	Sub contracted Buckeye	10
0	40000	Wide World Importers	Sub contracted Buckeye	
0	10000	Fabrikam, Inc.		
0				

Enter the text **Sub contracted Buckeye East.**

s only				
QTY. ON RENT	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION	SUB RENTAL DESCRIPTION
0	10000	Fabrikam, Inc.	Sub contracted Buckeye	10
0	40000	Wide World Importers	Sub contracted Buckeye	
0	10000	Fabrikam, Inc.		
0				

Click on the cell **Vendor No.**

View All View Outstanding PO's only View Outstanding					
QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION
0	0	0	10000	Fabrikam, Inc.	Sub contracted
0	0	0	40000	Wide World Importers	Sub contracted
0	0	0	10000	Fabrikam, Inc.	Sub contracted
0	0	0			



ODT Rentals Online Help

Click on **No. = 10000**, **Name = Fabrikam, Inc.**, **City = Atlanta**

Select the Vendor that the PO is to be created for.

CURRENT	RETURN	RETURNED	VENDOR NO.	VENDOR NAME	DESCR
0	0	0	10000	Fabrikam, Inc.	Sub con
0	0	0	40000	Wide World Importers	Sub con
0	0	0	10000	Fabrikam, Inc.	Sub con
0	0	0			

NO.	NAME	CI
10000	Fabrikam, Inc.	At
20	Select record "10000" at Up Consultants	Ch
30000	Graphic Design Institute	Mi
40000	Wide World Importers	At
50000	Nod Publishers	At

+ New

Click on the cell **Sub Rental Description**

Y.	D	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION	SU RE NC
0		10000	Fabrikam, Inc.	Sub contracted Buckeye	10
0		40000	Wide World Importers	Sub contracted Buckeye ...	
0		10000	Fabrikam, Inc.	Sub contracted Buckeye E...	
0		10000	Fabrikam, Inc.		

Enter the text **Sub contracted Buckeye East.**

Y.	D	VENDOR NO.	VENDOR NAME	SUB RENTAL DESCRIPTION	SU RE NC
0		10000	Fabrikam, Inc.	Sub contracted Buckeye	10
0		40000	Wide World Importers	Sub contracted Buckeye ...	
0		10000	Fabrikam, Inc.	Sub contracted Buckeye E...	
0		10000	Fabrikam, Inc.		

The next step is to select the records for which you want Purchase Orders to be created for.

In this example, all records will be selected.

NOTE

Each record must be selected individually, rather than checking the Select All box to the left of the Document No. field.

Click on the cell **Document No.** with the value **RC00029**

DOCUMENT NO.	DESCRIPTION	LOCATION CODE
RC00028	Sub Buckeye Ditcher	EAST
RC00029	Sub Buckeye Ditcher	WEST
RC00029	Sub Buckeye Ditcher	EAST
RC00030	Sub Buckeye Ditcher	EAST



ODT Rentals Online Help

Click on the row menu button

SearchEdit ListProcessOpen in Excel

Create Sub Rental PO(s)Open Rental Document

DOCUMENT NO.	DESCRIPTION	LOCATION CODE
RC00028	Sub Buckeye Ditcher	EAST
RC00029	Sub Buckeye Ditcher	WEST
RC00029	Sub Buckeye Ditcher	EAST
RC00030	Sub Buckeye Ditcher	EAST

Click on the menu item **Select More**

Create Sub Rental PO(s)Open Rental Document

DOCUMENT NO.	DESCRIPTION	LOCATION CODE
RC00028	Sub Buckeye Ditcher	EAST
RC00029	Sub Buckeye Ditcher	WEST
RC00029	Sub Buckeye Ditcher	EAST
RC00030	Sub Buckeye Ditcher	EAST

Click on the checkbox **Select row**

Create Sub Rental PO(s)Open Rental Document

DOCUMENT NO.	DESCRIPTION	LOCATION CODE	
<input type="checkbox"/>	RC00028	Sub Buckeye Ditcher	EAST
<input checked="" type="checkbox"/>	RC00029	Sub Buckeye Ditcher	WEST
<input checked="" type="checkbox"/>	RC00029	Sub Buckeye Ditcher	EAST
<input type="checkbox"/>	RC00030	Sub Buckeye Ditcher	EAST

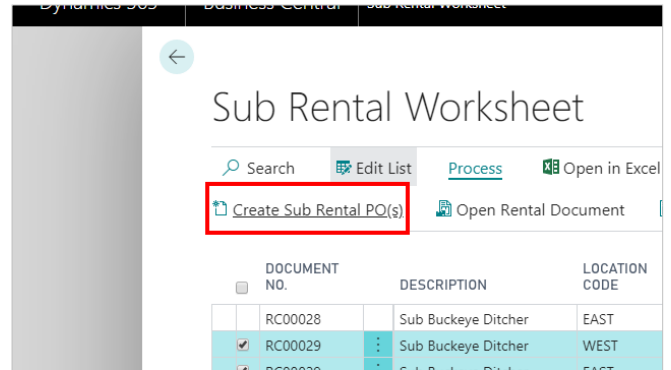
Click on the checkbox **Select row**

Create Sub Rental PO(s)Open Rental Document

DOCUMENT NO.	DESCRIPTION	LOCATION CODE	
<input type="checkbox"/>	RC00028	Sub Buckeye Ditcher	EAST
<input checked="" type="checkbox"/>	RC00029	Sub Buckeye Ditcher	WEST
<input checked="" type="checkbox"/>	RC00029	Sub Buckeye Ditcher	EAST
<input checked="" type="checkbox"/>	RC00030	Sub Buckeye Ditcher	EAST

Select row

Click on the navigation menu item **Create Sub Rental PO(s)**



Sub Rental Worksheet

Search Edit List Process Open in Excel

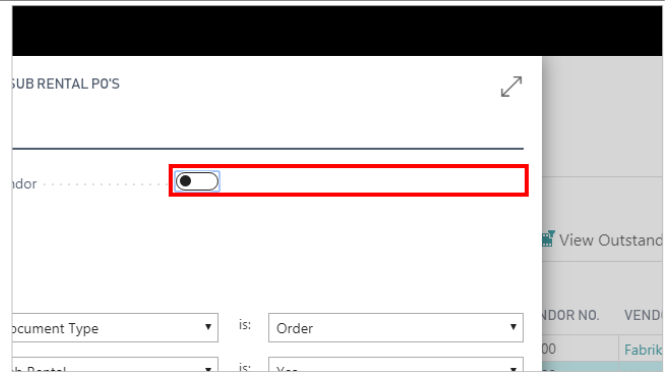
Create Sub Rental PO(s) Open Rental Document

DOCUMENT NO.	DESCRIPTION	LOCATION CODE
RC00028	Sub Buckeye Ditcher	EAST
RC00029	Sub Buckeye Ditcher	WEST
RC00030	Sub Buckeye Ditcher	EAST

Click on **One PO per Vendor, No**

Should your organization want to create multiple Purchase Orders where there is to one PO per Vendor No. for the selected records, then click on the field, One PO per Vendor to set it to Yes.

If your organization prefers to have a Purchase Order for each selected record, then No must be the setting on the One PO per Vendor field.



SUB RENTAL PO'S

Vendor: [Field]

Document Type: [Field] is: Order [Field]

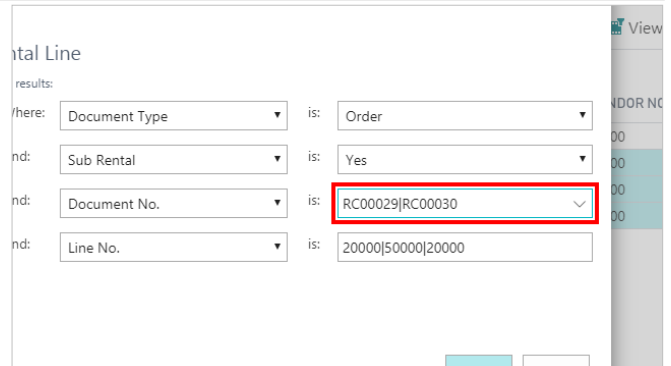
Sub Rental: [Field] is: Yes [Field]

Document No.: [Field] is: RC00029|RC00030 [Field]

Line No.: [Field] is: 20000|50000|20000 [Field]

Click on the field **Document No.**

Note that the filter contains both contracts for the lines in the worksheet which were individually selected.



Sub Rental Line

results:

Document Type: [Field] is: Order [Field]

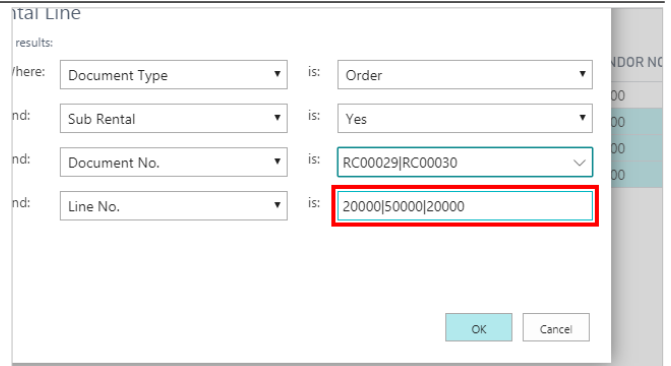
Sub Rental: [Field] is: Yes [Field]

Document No.: [Field] is: RC00029|RC00030 [Field]

Line No.: [Field] is: 20000|50000|20000 [Field]

Click on the field **Line No.**

This field will contain the Rental Contract line numbers for the records selected.



Sub Rental Line

results:

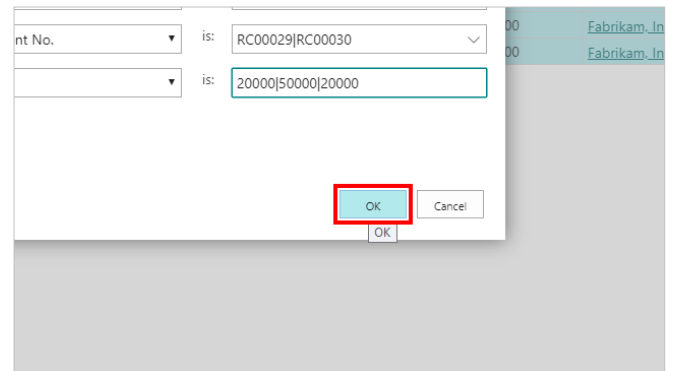
Document Type: [Field] is: Order [Field]

Sub Rental: [Field] is: Yes [Field]

Document No.: [Field] is: RC00029|RC00030 [Field]

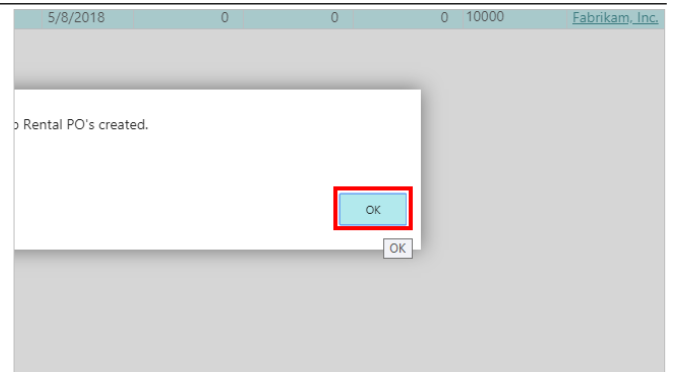
Line No.: [Field] is: 20000|50000|20000 [Field]

Click on the button **OK**



A dialog box with two input fields. The first field is labeled 'nt No.' and has a dropdown arrow. The second field is labeled 'is:' and contains the text 'RC00029|RC00030'. Below these fields is another field labeled 'is:' containing '20000|50000|20000'. At the bottom right, there are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

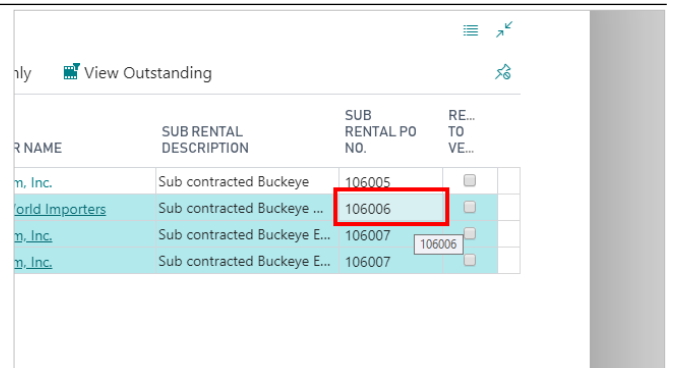
Click on the button **OK**



A message box with the text 'Sub Rental PO's created.' and an 'OK' button highlighted with a red box.

Click on the cell **Sub Rental PO No.** with the value **106006**

Note that after selecting OK the SUB RENTAL PO NO. field is automatically populated and the Purchase Order No. is the same for the records with the same Vendor No. selected.



A screenshot of a table with columns: 'R NAME', 'SUB RENTAL DESCRIPTION', 'SUB RENTAL PO NO.', and 'RE... TO VE...'. The table contains several rows of data. The row with 'Sub contracted Buckeye ...' and '106006' in the 'SUB RENTAL PO NO.' column is highlighted with a red box.

R NAME	SUB RENTAL DESCRIPTION	SUB RENTAL PO NO.	RE... TO VE...
m. Inc.	Sub contracted Buckeye	106005	
World Importers	Sub contracted Buckeye ...	106006	
n. Inc.	Sub contracted Buckeye E...	106007	106006
m. Inc.	Sub contracted Buckeye E...	106007	

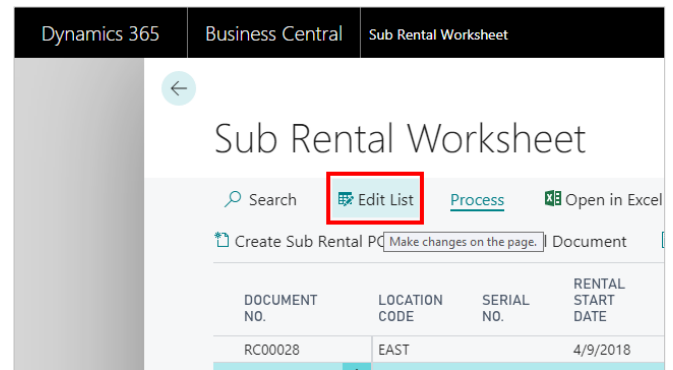
To view the newly created PO's, select one of the records and then select the command bar Process option, then Open Sub Rental Purchase Order.

4.6.4.4. How to Specify the Sub Rental Unit has been Returned to Vendor

Once the sub rental has been returned from being rented out and has been returned to the Vendor the field, Returned to Vendor must be checked. This is required to update the Rental Returned field on the Purchase Order line. And if not checked the record will continue to be displayed by default on the worksheet lines.

The following example demonstrates this.

Click on the navigation menu item **Edit List**



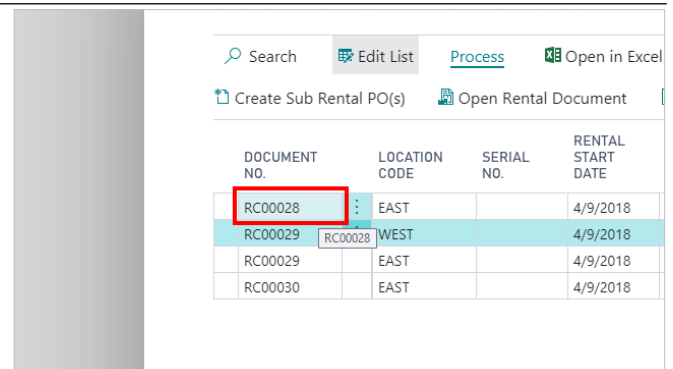
Sub Rental Worksheet

Search Edit List Process Open in Excel

Create Sub Rental PO Make changes on the page. Document

DOCUMENT NO.	LOCATION CODE	SERIAL NO.	RENTAL START DATE
RC00028	EAST		4/9/2018

Click on the cell **Document No.** with the value **RC00028**



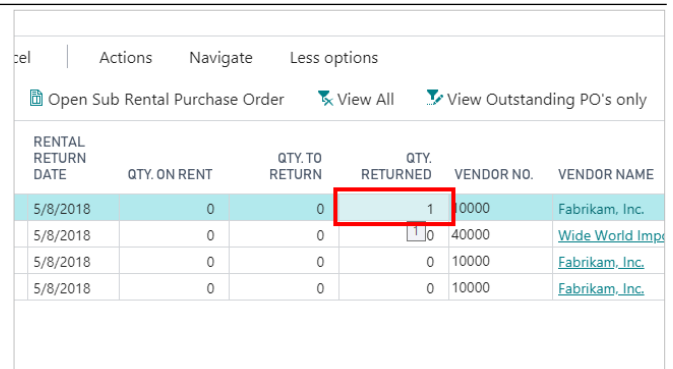
Search Edit List Process Open in Excel

Create Sub Rental PO(s) Open Rental Document

DOCUMENT NO.	LOCATION CODE	SERIAL NO.	RENTAL START DATE
RC00028	EAST		4/9/2018
RC00029	WEST		4/9/2018
RC00029	EAST		4/9/2018
RC00030	EAST		4/9/2018

Click on the cell **Qty. Returned** with the value **1**

Verify that the Sub Rental Unit has been returned on the contract.



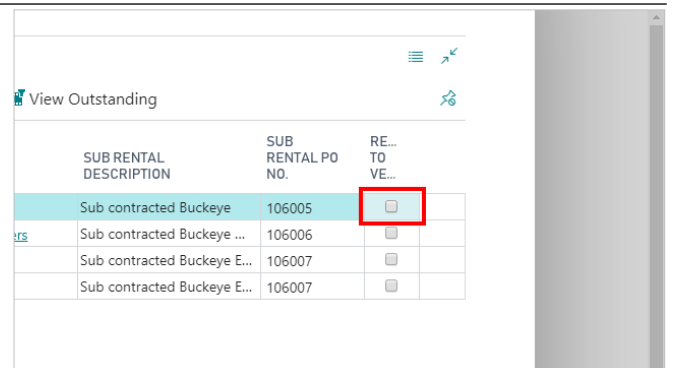
Actions Navigate Less options

Open Sub Rental Purchase Order View All View Outstanding PO's only

RENTAL RETURN DATE	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	VENDOR NO.	VENDOR NAME
5/8/2018	0	0	1	10000	Fabrikam, Inc.
5/8/2018	0	0	0	40000	Wide World Imp
5/8/2018	0	0	0	10000	Fabrikam, Inc.
5/8/2018	0	0	0	10000	Fabrikam, Inc.

Click on **Returned to Vendor**

Note that the worksheet line disappears when the Returned to Vendor was selected.



View Outstanding

SUB RENTAL DESCRIPTION	SUB RENTAL PO NO.	RE... TO VE...
Sub contracted Buckeye	106005	<input checked="" type="checkbox"/>
Sub contracted Buckeye ...	106006	<input type="checkbox"/>
Sub contracted Buckeye E...	106007	<input type="checkbox"/>
Sub contracted Buckeye E...	106007	<input type="checkbox"/>

In addition, the Filter list by at the left automatically opens which displays what filters were applied to the records in the worksheet.

This can be closed to maximize the number of fields visible on the worksheet.

Click on the navigation menu item popup **Process**

365

Business Central

Sub Rental Worksheet

←

Sub Rental Worksheet

Search

Edit List

Process

Open in Excel

Action

Create Sub Rental PO(s)

Open Rental Document

Open Sub Re

DOCUMENT NO.	LOCATION CODE	SERIAL NO.	RENTAL START DATE	RENTAL RETURN DATE	QTY
RC00029	WEST		4/9/2018	5/8/2018	

Click on the navigation menu item **View All**

To view all the records, including those with Returned to Vendor checked, select View All.

Excel

Actions

Navigate

Less options

Open Sub Rental Purchase Order

View All

View Outstanding PO's only

View all subrental contract lines for open rental contr

RENTAL RETURN DATE	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	VENDOR NO.	VENDOR NAME
8 5/8/2018	0	0	0	40000	Wide World I
8 5/8/2018	0	0	0	10000	Fabrikam, Inc

4.6.5. How to Process Sub Rental Purchase Orders

4.6.5.1. Overview

The Sub Rental Purchase Orders created have the lines for the sub rentals flagged as recurring and will remain open after invoicing to allow for continuous billing.

Sub Rental Fields on Purchase Order Lines

Rental Contract No.	Rental Contract Line No.	Rental Start Date	Rental End Date	Rental Returned	Recurri...
RC00015	20000	4/12/2021	6/11/2021	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The following fields have been added to the Purchase Order Lines to facilitate the recurring PO sub-rental invoicing.

- **Rental Contract No.:** Displays the number of the contract that the sub rental product is for.
- **Rental Contract Line No.:** Displays the number of the line on the contract that the sub rental product is for.
- **Rental Start Date:** Displays the date the rental is to commence on.
- **Rental End Date:** Displays the expected ending date of the rental.
- **Rental Returned:** Displays whether the product has been returned to the Vendor and cannot be edited on the PO line. This defaults from the Sub Rental Worksheet, Returned to Vendor field.
- **Recurring:** Displays whether the PO line will require multiple invoices to be posted as the product is on a rental contract line. This field can be cleared if the rental is for a single rental period, has been returned to the Vendor and the recurring invoicing is no long to occur.

When the Recurring field is flagged, and an invoice is posted the Quantity on the PO line is automatically incremented. Thus, enabling the ability to Post- Receive and Invoice for the next required invoice.

The following is a summary of the processing steps based on when the rental is for more than one rental period and the Purchase Order invoice is being processed after each Rental Invoice has been posted.

- Open the Sub Rental PO, enter the Direct Unit Cost Excl. Tax and other required fields, then post only the

receipt of the product.

- After the Rental contract has been invoiced for the first rental period, then open the PO and enter the Vendor Invoice No. and post the invoice.
- After the Rental Contract has been invoiced for the next rental period, then open the PO, adjust the posting date, enter/modify the Vendor Invoice No., and post the invoice.
- When the Sub Rental Unit has been returned to the Vendor, open the Sub Rental Worksheet, and check the Returned to Vendor field on the appropriate record. This will update the Rental Returned field on the PO line for visibility that the product has been returned.
- On the Purchase Order Line, if the Rental Returned field is flagged and no further invoices will be posted, clear the Recurring field, then post the final PO invoice for that line.

When both the Recurring field and the Rental Returned fields are flagged on a line, then a confirmation message occurs. The following is an example of the message.

The Sub rental unit on "RC00001"; "Line 20000" has been returned by the customer. Do you want to keep the PO line open as a recurring line? Yes/No.

When No is selected the Recurring field is automatically cleared and the PO invoicing processes as per normal processing.

When Yes is selected the standard Sub Rental processing of the invoice occurs.

Additional Processing Information

Should a PO be invoiced with the Recurring still flagged when should have been cleared prior to invoicing, then the following steps will need to be done on the line or lines.

- Clear the Recurring field
- Re-open the PO
- Modify the Quantity to be the same as the Quantity Invoiced
- Delete the PO only if all lines are fully processed

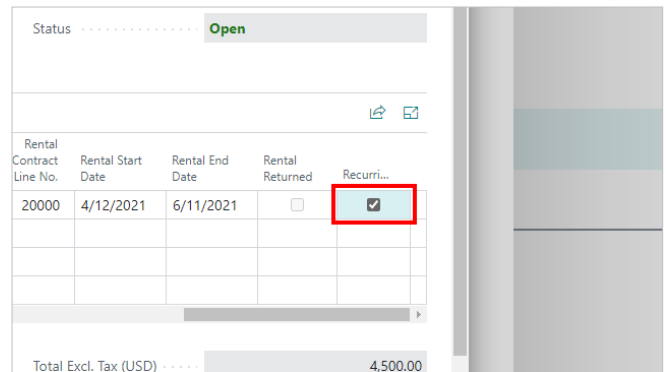
NOTE: The user may want to Archive the PO prior to modifying the Quantity and possibly prior to deleting it.

4.6.5.2. Processing the Purchase Order

The following demonstrates the processing of a Sub Rental Purchase Order for a sub rental on a contract that is for 2 rental periods with invoicing at the end of each rental period.

- The product receipt on the PO will be demonstrated.
- The Rental Contract Rental Units will be shipped and then invoiced at the end of the first rental period.
- Then the posting of the first invoice being posted will be demonstrated.
- The Rental Contract will be invoiced for the second period and the Rental Units including the sub-rental will be returned. And on the Sub Rental Worksheet the Returned to Vendor field will be checked.
- Then on the PO the processing of the final invoice will be demonstrated.

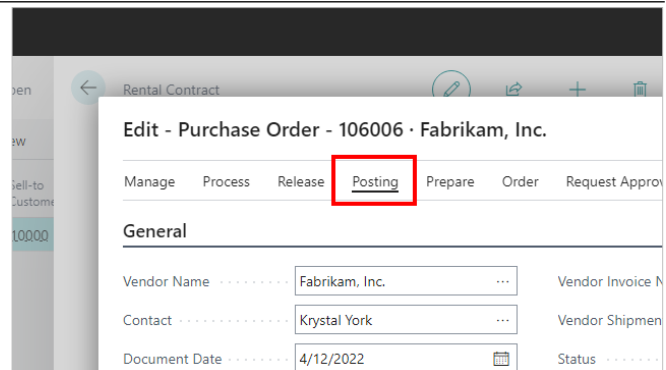
Click on the cell **Recurring** with the value **on**



Rental Contract Line No.	Rental Start Date	Rental End Date	Rental Returned	Recurring
20000	4/12/2021	6/11/2021	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Total Excl. Tax (USD) : 4,500.00

Click on the navigation menu item popup **Posting**



Edit - Purchase Order - 106006 - Fabrikam, Inc.

Manage Process Release **Posting** Prepare Order Request Approv

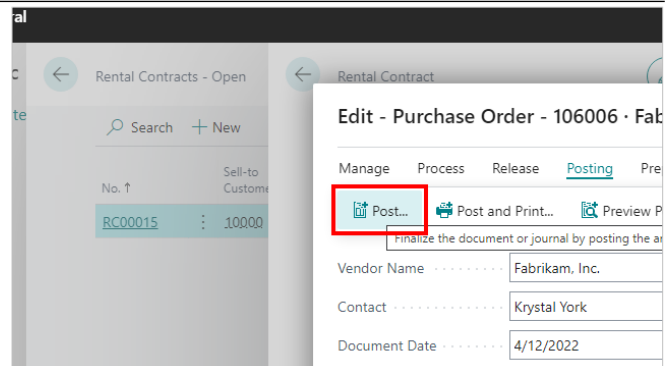
General

Vendor Name : Fabrikam, Inc. Vendor Invoice N

Contact : Krystal York Vendor Shipmen

Document Date : 4/12/2022 Status :

Click on the navigation menu item **Post...**



Edit - Purchase Order - 106006 - Fabrikam, Inc.

Manage Process Release **Posting** Pre

Post... Post and Print... Preview P

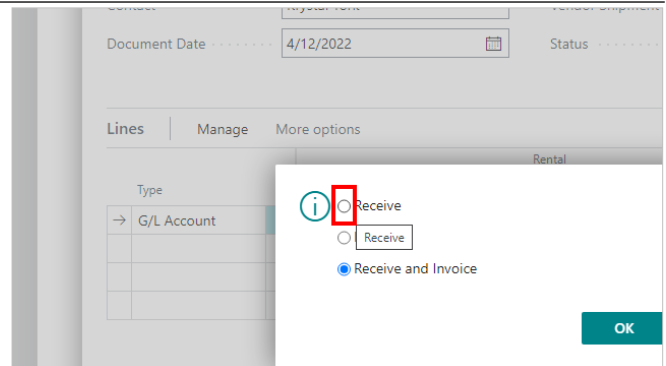
Finalize the document or journal by posting the a

Vendor Name : Fabrikam, Inc.

Contact : Krystal York

Document Date : 4/12/2022

Click on the field **Receive**



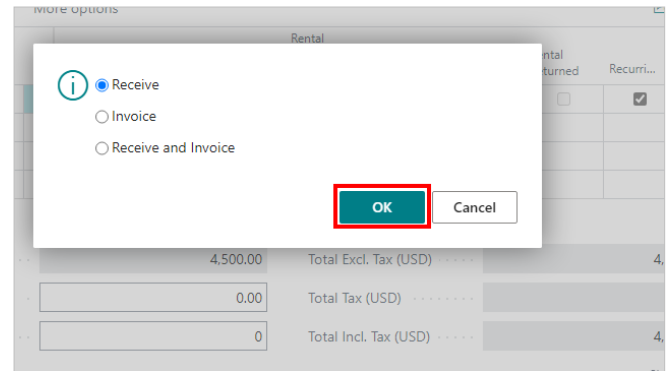
Receive

☒ Receive

☐ Receive and Invoice

OK

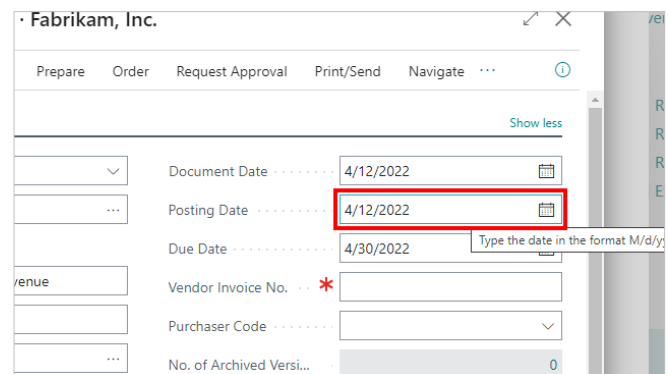
Click on the button **OK**



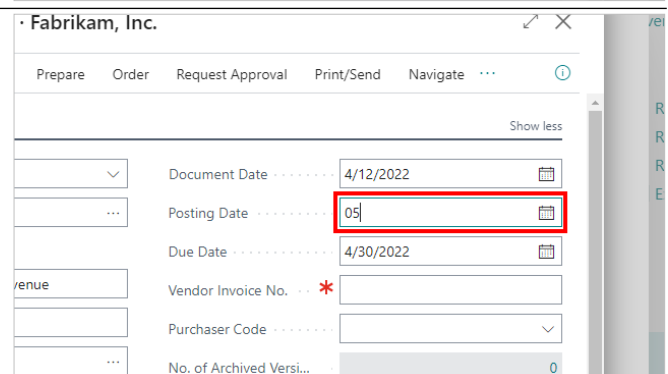
The following demonstrates the posting of the first invoice for the PO after the rental contract was invoiced.

Click on the field **Posting Date**

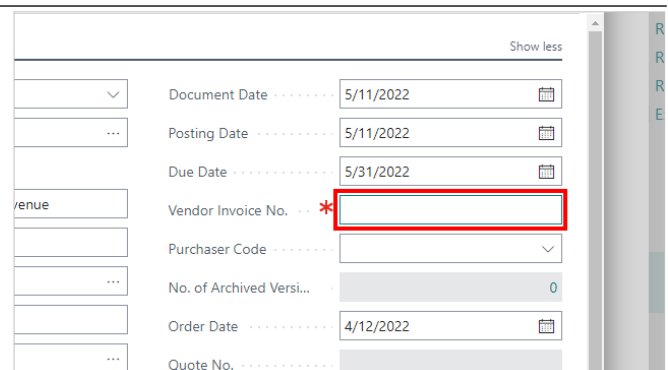
Enter or open the calendar and select the Posting Date that the Invoice is to have.



Enter **Posting Date**.



Click on the field **Vendor Invoice No.**





Enter **Vendor Invoice No.**

Click on the navigation menu item popup **Posting**

Click on the navigation menu item **Post...**

Click on the field **Invoice**



Click on the button **OK**

more options

☐ Receive
☒ Invoice
☐ Receive and Invoice

OK Cancel

4,500.00 Total Excl. Tax (USD) 4,500.00
0.00 Total Tax (USD)
0 Total Incl. Tax (USD) 4,500.00

Note that the Purchase Order did not close.

This is due to the PO line having the Recurring field checked and the Quantity incrementing.

Click on the cell **Quantity** with the value **2**

The quantity is incremented to 2 as the Recurring field on the line is checked.

5/11/2022 Status Open

More options

Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax
Buckeye subrental for...	EAST		2			4,500.00

9,000.00 Total Excl. Tax (USD) 9,000.00

Click on the cell **Qty. to Receive** with the value **1**

The Qty. to Receive and Qty. to Invoice are automatically populated as the Quantity was increased.

Document Date 5/11/2022 Status

Lines Manage More options

Type	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity Invoiced
G/L Account	9,000.00	1	1	1	1

Subtotal Excl. Tax (USD) 9,000.00 Total Excl. Tax (USD) 9,000.00

The following demonstrates the process for the PO after the final rental has been invoiced, the Sub Rental Unit returned and the Sub Rental Worksheet, Returned to Vendor checked.

Click on the field **Posting Date**

Order Request Approval Print/Send Navigate Actions

Show less

Document Date 5/11/2022
Posting Date 5/11/2022
Due Date 5/31/2022 Type the date in the format M/

Avenue Vendor Invoice No. SUB-1
Purchaser Code
No. of Archived Versi... 0



ODT Rentals Online Help

Enter **Posting Date**.

Enter or open the calendar and select the Posting Date that the Invoice is to have.

Order Request Approval Print/Send Navigate Actions

Document Date 5/11/2022

Posting Date 5/11/2022

Due Date 5/31/2022

Vendor Invoice No. SUB-1

Purchaser Code

No. of Archived Versi... 0

Click on the field **Vendor Invoice No.**

Order Request Approval Print/Send Navigate Actions

Vendor Invoice No. SUB-1

Vendor Shipment No.

Status Open

Enter **Vendor Invoice No..**

Order Request Approval Print/Send Navigate Actions

Vendor Invoice No. SUB

Vendor Shipment No.

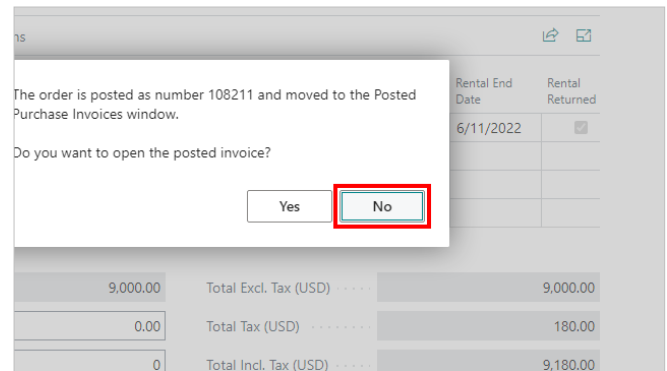
Status Open

Click on the cell **Rental Returned** with the value on

Note that the Rental Returned field is now checked which indicates the product has been returned to the Vendor.

Contract No.	Rental Contract Line No.	Rental Start Date	Rental End Date	Rental Returned	Recurri...
015	20000	4/12/2022	6/11/2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9,000.00		Total Excl. Tax (USD)		9,000.00	

Click on the button **No**



In this example there were no other PO lines, so the PO is automatically deleted.

If there had been additional PO lines that were not fully processed or there were additional sub rental lines with the Recurring field checked the PO would remain open.

4.7. Advanced Proforma Invoice

4.7.1. Advanced Proforma Invoice Overview

4.7.1.1. Overview

Some organizations have agreements with their customers whereby a pre-invoice is sent to the customer for approval prior to posting the invoice.

The Advanced Proforma functionality provides the ability to create an invoice, but not post the invoice, and essentially locks the current contract. The contract cannot be modified until the Advanced Proforma Invoice has been approved by the customer and posted.

A unique numbering series is used with the Advanced Proforma Invoice which consists of the contract number plus a suffix. For example, RC00001-001. The suffix increments for each advanced proforma invoice created from the contract. The Advanced Proforma Invoice No. flows through to the Posted Sales Invoice.

Rental Contract invoicing can only be done using either the standard rental invoicing or the Advanced Pro-Forma Invoicing. If a contract has been invoiced using the standard rental invoicing, then the invoicing cannot be done using the Advanced Proforma menu options. All subsequent invoicing must be done using the standard rental invoicing process.

Likewise, if an Advanced Pro-Forma Invoice has been processed on a contract, then the standard rental invoicing process cannot be used. All subsequent invoicing must be done using the advanced proforma invoicing process.

The posting of the Advanced Pro-Forma Invoice can only be done from the Rental Contract, once specified as sent and approved on the open sales invoice. The Advanced Pro-Forma invoice cannot be posted from the open Sales Invoices list or document.

To utilize the Advanced Proforma functionality, the Advanced Pro-Forma Invoice field on Rental Management Setup must be enabled. The Check Proforma On Posting field is optional, however, it is recommended that it be enabled so that taxes are checked on the pro-forma invoices before posting.

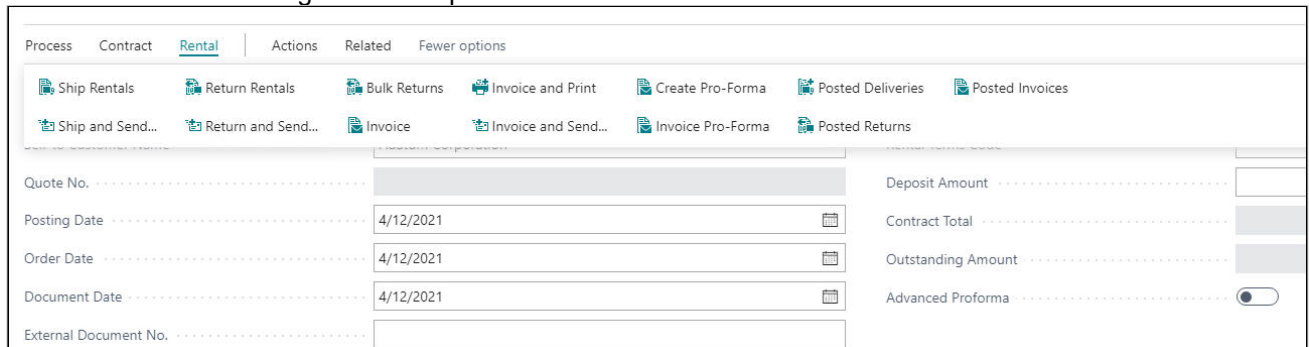
If an organization needs to continue to process subsequent Advanced Proforma Invoices before the customer has approved an Advanced Proforma, then the Transfer Rental Contracts feature can be used to automatically create a new contract, and transfer some or all of the rental lines for the same customer or a different customer.

The transfer functionality contains the ability to enforce continuous billing and maintains an audit trail including the initial contract and each transfer that occurs.

To learn about the Transfer Rental Contracts feature, go to the ODT Rentals Online Help, Processing Rentals, Additional Rental Processes, Transfer Rental Contracts.

4.7.1.2. Rental Contract Overview

The following picture displays the menu options which are only displayed when the Advanced Proforma field is enabled on Rental Management Setup.



The following related advanced proforma features are only visible on the Rental Contract when the Advanced Pro-Forma Invoice field is enabled on Rental Management Setup.

Menu options within the Rental Menu option:

- **Create Pro-Forma**, which when selected will open a page where a Cut-off Date is entered like the standard rental proforma and creates an open Advanced Pro-Forma sales invoice.
- **Invoice Pro-Forma**, which is used to post the Advanced Pro-Forma Invoice.

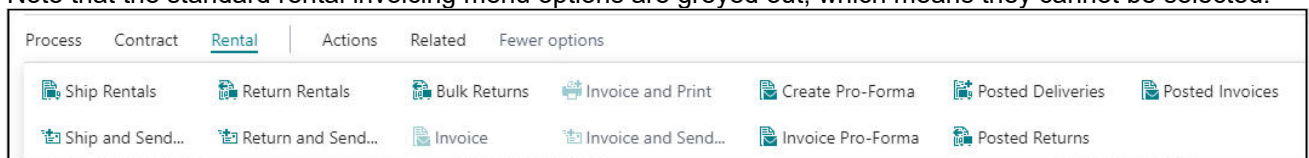
An additional field, Advanced Proforma, has been added to the General tab. The field is automatically enabled when the Advanced Pro-Forma Invoice is created and specifies that an open Advanced Proforma Invoice exists. This field cannot be edited.

Once an Advanced Pro-Forma Invoice has been created, whether posted or not, then the standard rental invoicing menu option can no longer be selected.

Nor can the standard proforma invoice be selected using Home, Print Proforma Invoice.

The following picture displays the Rental menu options after an Advanced Pro-Forma has been created.

Note that the standard rental invoicing menu options are greyed out, which means they cannot be selected.



An additional tab, Advanced Proforma, has been added to the Rental Contract, which displays fields related to the Advanced Proforma.

The following picture displays the Advanced Proforma tab with the fields populated as an Advanced Proforma Invoice had been created, sent to the customer, and approved by the customer.



Advanced Proforma

Advanced Proforma

Sent Status

Approved

Sent By

ODT\ASTAPLETON

Sent Date

5/11/2021

Approved Date

5/11/2021

Approved By

ODT\ASTAPLETON

Approved Document ...

RC00011-001

Approved Cut-off Date

5/11/2021

Approved Amount

18,506.00

Approved Amount In...

18,876.12

Document Signatures

An electronic signature or signatures can be captured on the Advanced Proforma Invoice, Document Signatures tab or Fact Box.

When on Rental Management Setup the field, Transfer Signature On Advanced Proforma Post, is enabled, then when the invoice is posted, the signatures will flow to the Posted Sales Invoice.

To learn about Electronic Signatures, see ODT Rental Online Help, Additional Rental Processes, Electronic Signatures.

4.7.1.3. Advanced Proforma Invoice Overview

The open Advanced Pro-Forma Invoice has a unique format that differs from the standard sales invoices.

The format of the Sales Invoice documents include additional fields, tabs and menu options.

The following picture displays an example of Advanced Pro-Forma Invoice document in the Sales Invoices.

The General tab contains the field, Pro-Forma Invoice which is automatically enabled, when the invoice is created and cannot be disabled.

There are Rental Lines tab, Lines tab (for sales lines) and a tab called Pro-Forma Details.

RC00011-001 · Adatum Corporation

Report Approve Posting Prepare Invoice Release Request Approval Navigate Actions

General

Customer Name Adatum Corporation Due Date 6/11/2021
Contact Robert Townes Status Open
Posting Date 5/11/2021 Pro-Forma Invoice

Rental Lines

Rental Package No.	Rental Unit No.	Rental Quantity	Rental Terms	Rental Fixed Unit Price	Starting Date-Time	Ending Date-Time
→	RU00011-001	1	MONTH-PEN...	9,000.00	4/12/2021 12:00 ...	5/11/2021 11:5
	RU00011-002	1	MONTH-PEN...	9,000.00	4/12/2021 12:00 ...	5/11/2021 11:5
	RU00027	2	MONTH-PEN...	253.00	4/12/2021 12:00 ...	5/11/2021 11:5

Lines

Type	No.	Description	Location Code	Quantity	Unit of Measure Code
→ Item	*	*			

Subtotal Excl. Tax (US...	18,506.00	Total Excl. Tax (USD)	18,506.00
Inv. Discount Amount...	0.00	Total Tax (USD)	370.12
Invoice Discount %	0	Total Incl. Tax (USD)	18,876.12

Invoice Details

4/12/2021	1M(8D)	Yes	ATLANTA, GA
-----------	--------	-----	-------------

Shipping and Billing

Foreign Trade

Pro-Forma Details

Pro-Forma Invoice	Not Sent	Approved Date	
Sent Status		Approved By	
Sent By		Cut-off Date	5/11/2021
Sent Date			

NOTES

- The Advanced Pro-Forma Invoice can only be posted from the Rental Contract.
- The Advanced Pro-Forma Invoice can be deleted, if required, when the Pro-Forma Details, sent and approved fields are not populated.

ODT Rentals Online Help

Menu options related to the Advanced Pro-Forma feature include:

Report for printing the advanced proforma in a format similar to the rental invoice.

Approve with 3 sub-menu options of Sent, Cancel and Approved.

- **Sent** is to be selected when the Advanced Pro-Forma document has been sent to the Customer, which updates the Pro-Forma Details tab, sent related fields on the Advanced Pro-Forma Invoice and the Advanced Proforma tab on the Rental Contract.
- **Approved** is to be selected when the Customer has approved the Advanced Pro-Forma Invoice sent to them. The selection of the Approved updates the Pro-Forma Details tab, approval related fields on the Advanced Pro-Forma Invoice and the Advanced Proforma tab on the Rental Contract.
- **Cancel**, which when selected will clear the sent and approved related fields on the Pro-Forma Details tab on the Advanced Pro-Forma Invoice and the Advanced Proforma tab on the Rental Contract.

The following displays a broader picture of the Rental Lines tab, which includes fields from the rental lines and sales posting fields.

Rental Lines		Manage	Line	Fewer options													
Rental Package No.	Rental Unit	Rental Quantity	Rental Terms	Rental Fixed Unit Price	Starting Date-Time	Ending Date-Time	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Disc. %	Line Amount Excl. Tax	Amount Including Tax
→	⋮	RU00011-001	1	MONTH-PEN...	9,000.00	4/12/2021 12:00 ...	5/11/2021 11:59 ...	40100	Income, Services	EAST	1	9,000.00	ATLANTA, GA	SUPPLIES		9,000.00	9,180.00
		RU00011-002	1	MONTH-PEN...	9,000.00	4/12/2021 12:00 ...	5/11/2021 11:59 ...	40100	Income, Services	EAST	1	9,000.00	ATLANTA, GA	SUPPLIES		9,000.00	9,180.00
		RU00027	2	MONTH-PEN...	253.00	4/12/2021 12:00 ...	5/11/2021 11:59 ...	40100	Income, Services	EAST	2	253.00	ATLANTA, GA	SUPPLIES		506.00	516.12

4.7.2. How to Set Up for Using the Advanced Proforma

4.7.2.1. Overview

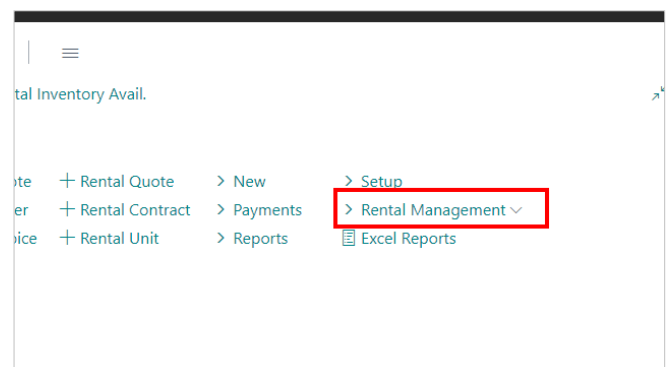
In order to use the Advanced Pro-Forma functionality the configuration on Rental Management Setup is required.

The Advanced Pro-Forma Invoice field must be enabled. The enabling of the Check Proforma On Posting field is optional, however, it is recommended that it be enabled so that taxes are checked on the pro-forma invoices before posting.

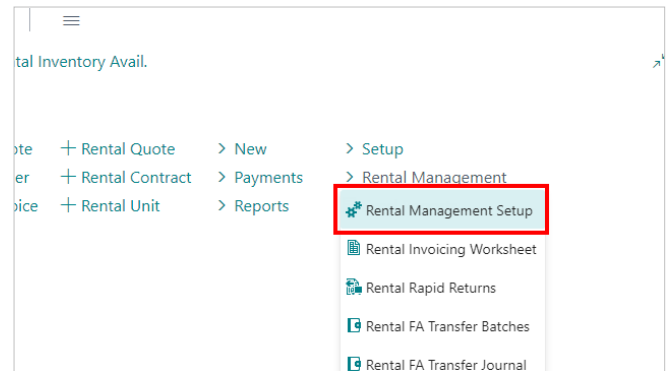
4.7.2.2. How to Set Up Rental Management Setup for Advanced Proforma

The following demonstrates the setup on Rental Management Setup.

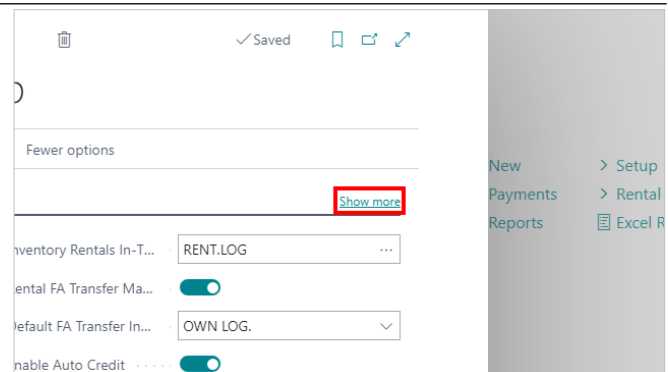
Click on the navigation menu item popup **Rental Management**



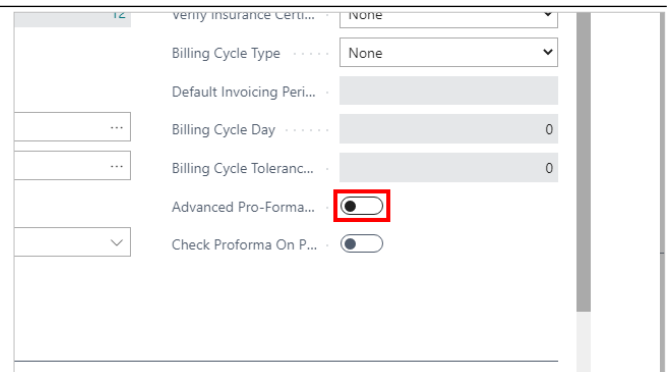
Click on the navigation menu item **Rental Management Setup**



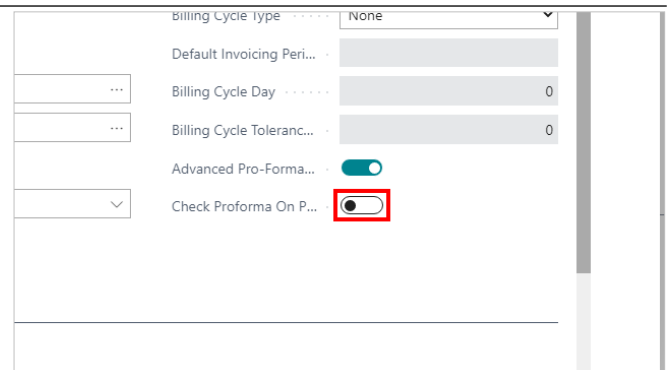
Click on the button **Show more**



Click on the toggle field **Advanced Pro-Forma Invoice**



Click on the toggle field **Check Proforma on Posting**



4.7.3. How to Process Advanced Proforma Invoices

4.7.3.1. Overview

The following example demonstrates the processing of an Advanced Pro-Forma Invoice from a contract including:

- Creating an Advanced Pro-Forma Invoice from a Rental Contract
- Printing the Pro-Forma Invoice
- Updating the invoice as sent
- Updating the invoice as approved by the Customer

Posting the Pro-Forma Invoice from the Rental Contract

•

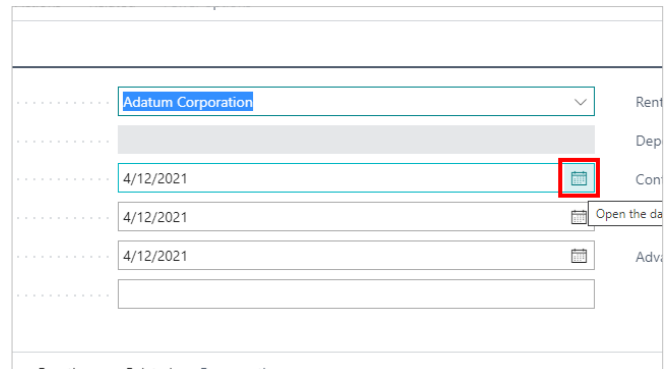
4.7.3.2. How to Create an Advanced Pro-Forma Invoice

IMPORTANT

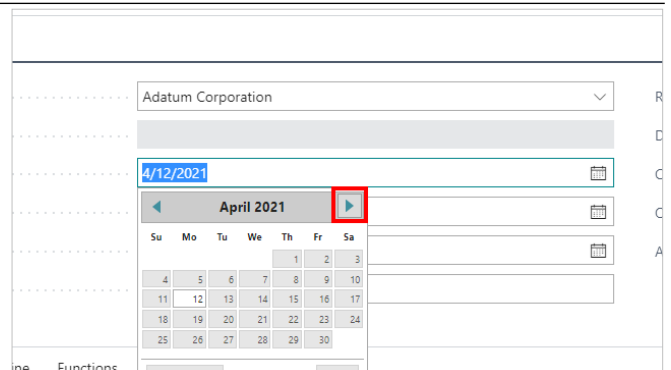
Prior to creating the Pro-Forma Invoice ensure that the Posting Date on the Rental Contract is set to the date which will be used as the Cut-off Date for the proforma.

This will ensure that the Document Date, Due Date and Pmt. Discount Date fields on the proforma will set to the appropriate dates.

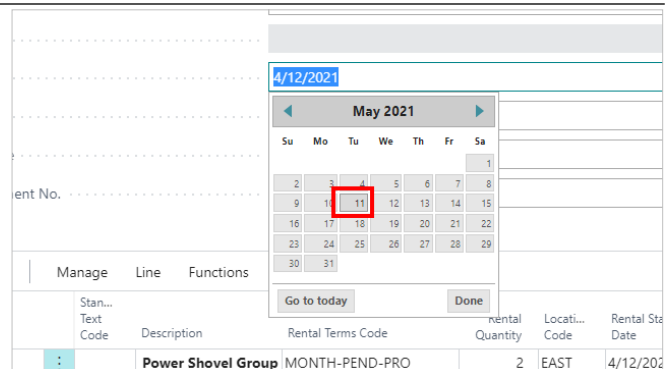
Click on the link **Open the date picker for Posting Date**



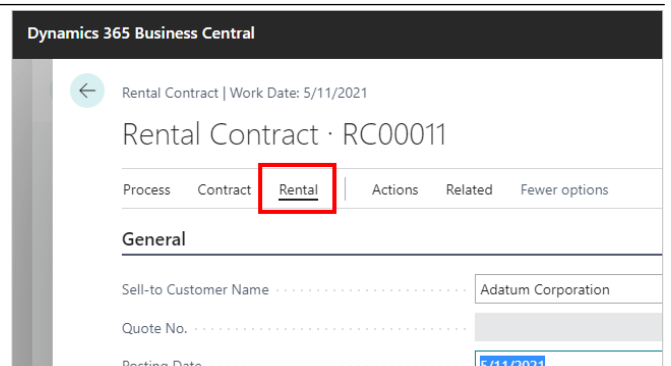
Click on the link **Next**



Click on a date in the calendar



Click on the navigation menu item popup **Rental**





Click on the navigation menu item **Create Pro-Forma**

The screenshot shows a web interface with a navigation menu at the top. The menu items are: Bulk Returns, Invoice and Print, **Create Pro-Forma** (highlighted with a red box), and Posted Deliveries. Below the menu, there are several input fields and buttons. The 'Create Pro-Forma' button is located in the top right corner of the main content area.

Click on the link **Open the date picker for Cut-off Date**

The screenshot shows a 'Create Rental Pro-Forma' dialog box. The 'Cut-off Date' field is highlighted with a red box, and a date picker icon is visible next to it. The dialog box also contains an 'Advanced' section and buttons for 'Schedule...', 'OK', and 'Cancel'.

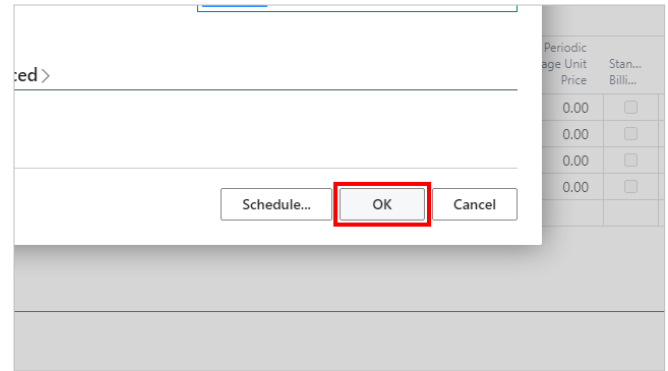
Click on the link **Previous**

The screenshot shows the 'Create Rental Pro-Forma' dialog box with a calendar view open for June 2021. The 'Previous' button (left arrow) is highlighted with a red box. The calendar shows dates from 1 to 26. The dialog box also contains an 'Advanced' section and buttons for 'Schedule...', 'OK', and 'Cancel'.

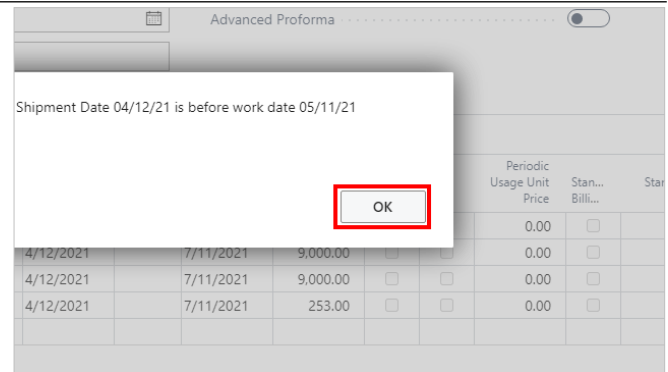
Click on a date in the calendar

The screenshot shows the 'Create Rental Pro-Forma' dialog box with a calendar view open for May 2021. The date 11 is highlighted with a red box. The calendar shows dates from 1 to 31. The dialog box also contains an 'Advanced' section and buttons for 'Go to today', 'Done', and 'Cancel'.

Click on the button **OK**

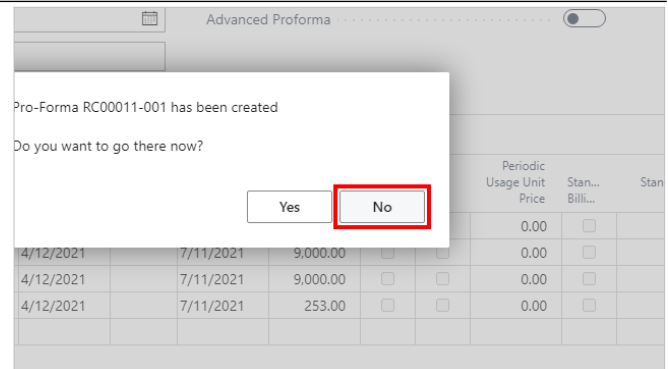


Click on the button **OK**



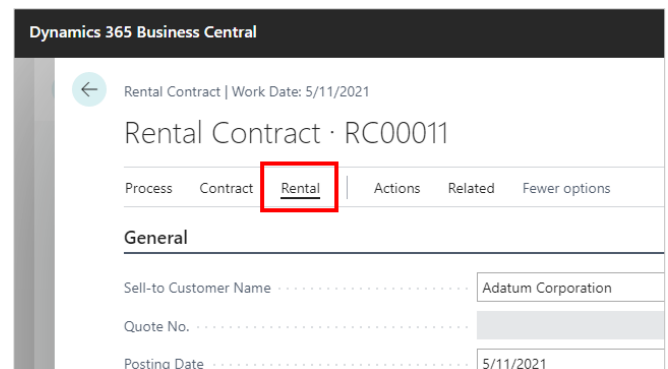
Click on the button **No**

If Yes is selected, then the Advanced Pro-Forma invoice will be opened.

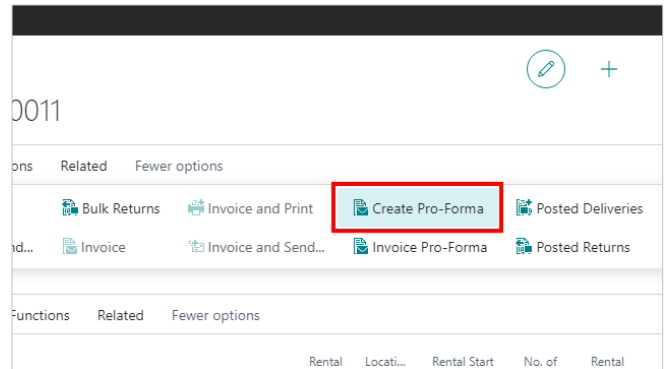


The following demonstrates how to access the open Advanced Pro-Forma invoice from the Rental Contract.

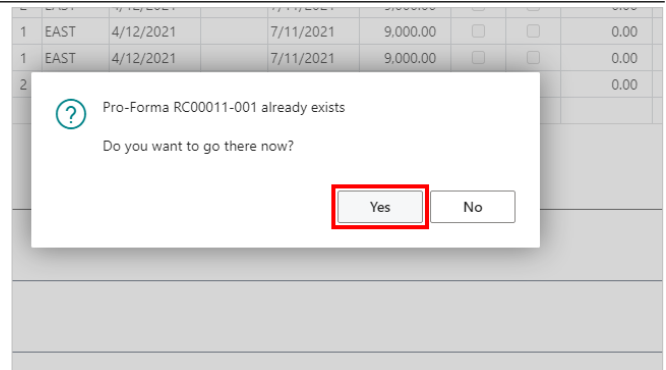
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Create Pro-Forma**



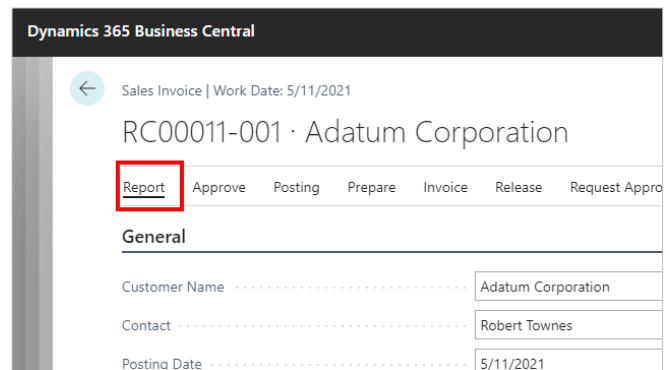
Click on the button **Yes**



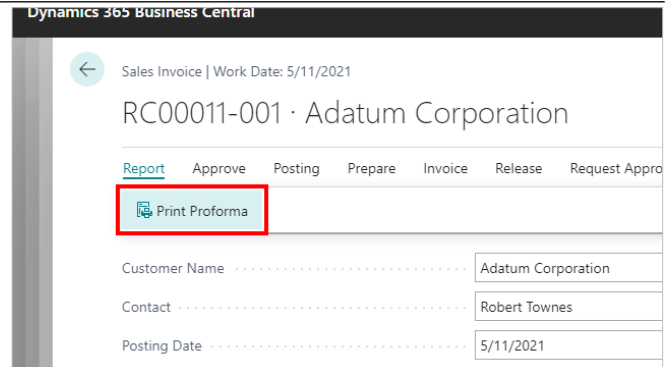
4.7.3.3. How to Print, Send and Approve the Pro-Forma Invoice

The following demonstrates the steps for printing the proforma invoice.

Click on the navigation menu item popup **Report**



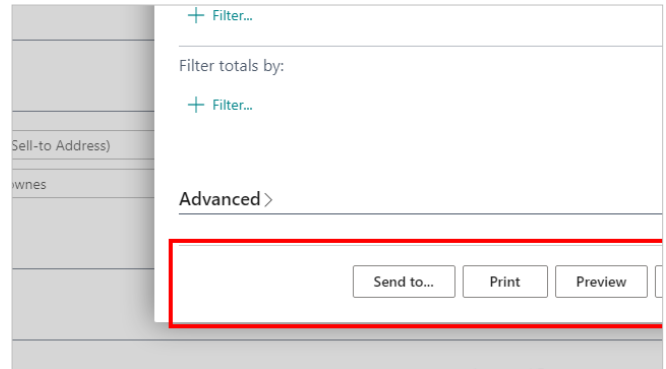
Click on the navigation menu item **Print Proforma**



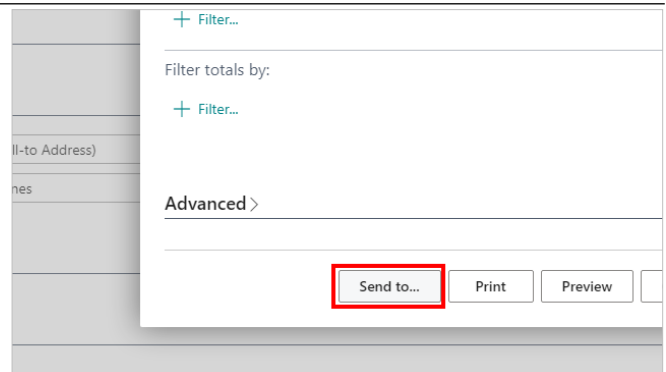
ODT Rentals Online Help

Click on **Send to... Print Preview Cancel**

Select the preferred method of printing the Proforma Invoice.

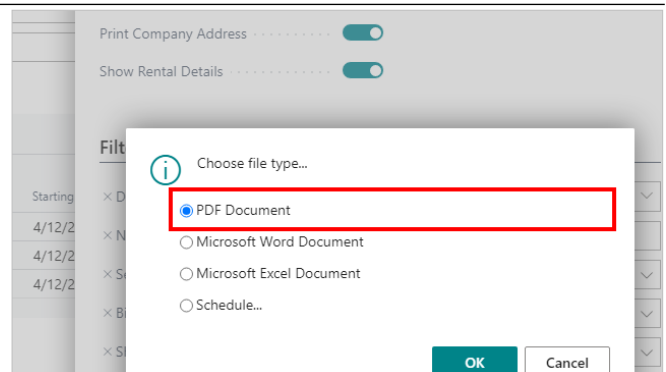


Click on the button **Send to...**

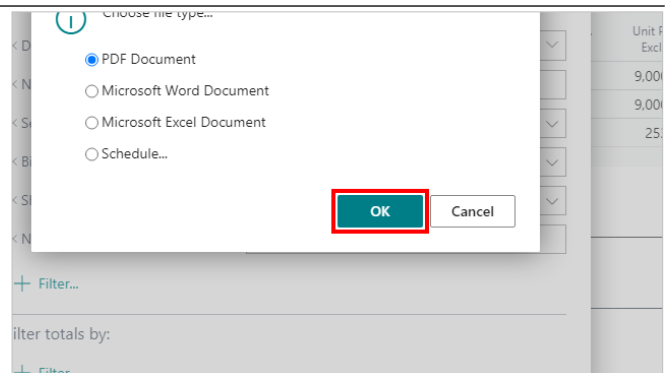


Click on the item **PDF Document**

When Send is selected the PDF Document must be selected.



Click on the button **OK**





ODT Rentals Online Help

Click on **Rental Proforma.pdf**.

Save the pdf file to the applicable location on the network.

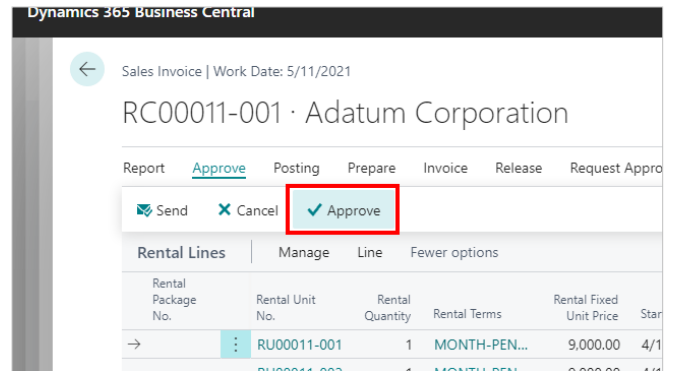
The following steps demonstrate the specification that the Pro-Forma Invoice has been sent to the customer, approved by the customer, and the reviewing of the Pro-Forma Details tab.

Click on the navigation menu item popup **Approve**

Click on the navigation menu item **Send**

Click on the navigation menu item popup **Approve**

Click on the navigation menu item **Approve**



The following picture displays the Pro-Forma Details tab on the invoice, updated by the selection of Send and Approve.

Pro-Forma Details	
Pro-Forma Invoice	<input checked="" type="checkbox"/>
Sent Status	Approved
Sent By	ODT\ASTAPLETON
Sent Date	5/11/2021
Approved Date	5/11/2021
Approved By	ODT\ASTAPLETON
Cut-off Date	5/11/2021

4.7.3.4. How to Post the Pro-Forma Invoice from the Contract

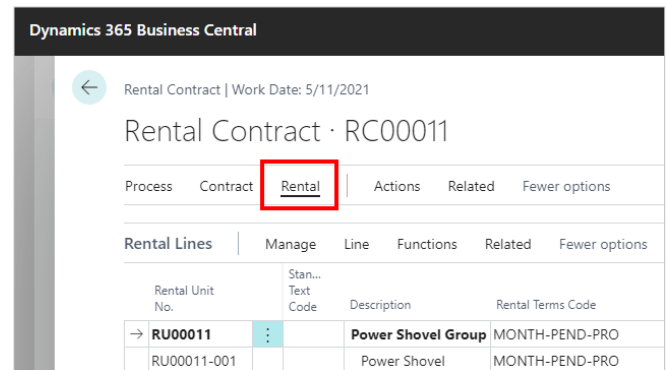
The following demonstrates the reviewing of the Rental Contract, Advanced Proforma tab, and the posting of the Advanced Proforma Invoice.

The following picture displays the Advanced Proforma tab on the Rental Contract after sending and approving the invoice.

Advanced Proforma	
Advanced Proforma	<input checked="" type="checkbox"/>
Sent Status	Approved
Sent By	ODT\ASTAPLETON
Sent Date	5/11/2021
Approved Date	5/11/2021
Approved By	ODT\ASTAPLETON
Approved Document	RC00011-001
Approved Cut-off Date	5/11/2021
Approved Amount	18,506.00
Approved Amount In...	18,876.12

The following steps demonstrate the invoicing of the Advanced Pro-Forma Invoice.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

Rental Contract | Work Date: 5/11/2021

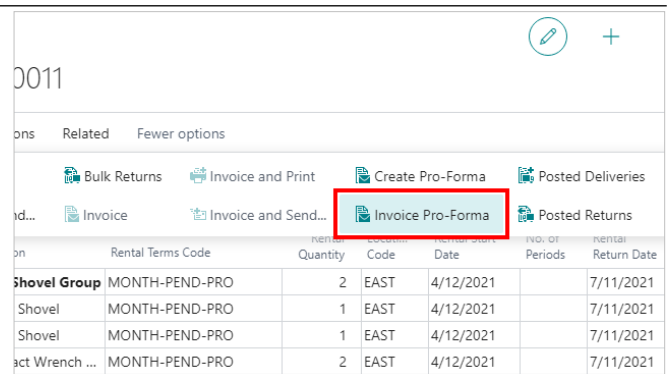
Rental Contract · RC00011

Process Contract **Rental** Actions Related Fewer options

Rental Lines Manage Line Functions Related Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ RU00011		Power Shovel Group	MONTH-PEND-PRO
RU00011-001		Power Shovel	MONTH-PEND-PRO

Click on the navigation menu item **Invoice Pro-Forma**



0011

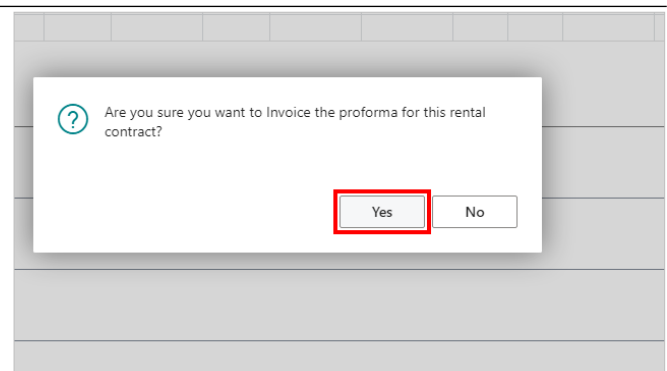
ons Related Fewer options

Bulk Returns Invoice and Print Create Pro-Forma Posted Deliveries

Invoice Invoice and Send... **Invoice Pro-Forma** Posted Returns

on	Rental Terms Code	Quantity	Code	Date	Periods	Rental Return Date
Shovel Group	MONTH-PEND-PRO	2	EAST	4/12/2021		7/11/2021
Shovel	MONTH-PEND-PRO	1	EAST	4/12/2021		7/11/2021
Shovel	MONTH-PEND-PRO	1	EAST	4/12/2021		7/11/2021
act Wrench ...	MONTH-PEND-PRO	2	EAST	4/12/2021		7/11/2021

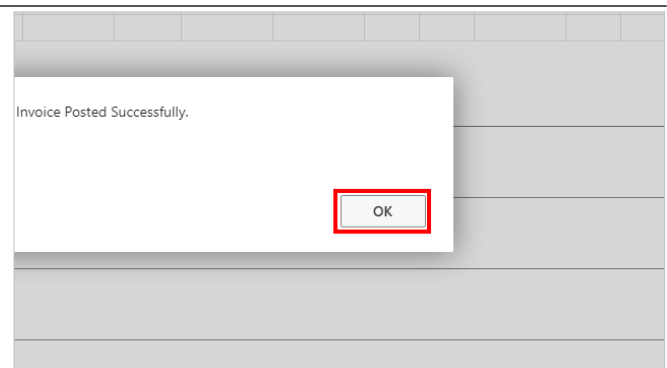
Click on the button **Yes**



Are you sure you want to Invoice the proforma for this rental contract?

Yes No

Click on the button **OK**



Invoice Posted Successfully.

OK

4.8. Rental FA Transfer Journal

4.8.1. Rental FA Transfer Journal Overview

4.8.1.1. Overview

When an organization is using Rental Locations and is linking Fixed Assets to Rental Units, it is important that the Rental Location on the Fixed Asset and the Location Code on the Rental Unit remain synchronized.

The Rental FA Transfer Journal, along with related setups on the Rental Management Setup, provides the

means to keep the rental location fields on the Rental Unit and Fixed Asset synchronized.

An organization can use the Rental FA Transfer Journal to transfer the Fixed Assets linked to a Rental Unit to a different rental location, which on posting will update the Rental Unit Location code field.

NOTE:

Only Fixed Assets that are linked to a Rental Unit can be entered on the journal lines.

When on Rental Management Setup the FA Transfer Mandatory field is enabled, then when a Rental Unit that is linked to a Fixed Asset is returned to a different or temporary rental location, a FA Transfer Journal is automatically created and posted to ensure the locations remain synchronized.

When the journal is posted, then a Rental FA Transfer Shipment and Rental FA Transfer Receipt documents are created and posted.

The Posted FA Transfer Shipments and Posted FA Transfer Receipts can be located using the Search.

On the Business Manager Profile, the documents are located in the Rentals menu option. On the Sales Order Processor Profile, the documents are located in the Posted Documents menu option.

In addition, Rental Ledger Entries will be created on the Rental Unit with a Type of Transfer to record the transfer transactions related to the shipment and receipt of the unit. The posted transfer documents can be opened from the Navigate menu option, Entry, Open Document and then select Transfer Document.

When a Rental Unit linked to a Fixed Asset is on a Rental Quote or Rental Contract, the Fixed Asset cannot be entered on the Rental FA Transfer Journal.

When a Rental Unit linked to a Fixed Asset has the Inactive field enabled, the Fixed Asset cannot be entered on the Rental FA Transfer Journal.

When a Fixed Asset linked to a Rental Unit has either or both the Inactive and Blocked fields enabled, the Fixed Asset cannot be entered on the FA Transfer Journal.

4.8.1.2. Setups Required for the Rental FA Transfer Journal

The setups required to ensure the location code fields remain synchronized include:

- No Series:

- Rental FA Trans Ship for the Posted FA Transfer Shipment documents
- Rental FA Trans Receipt for the Posted FA Transfer Receipt documents

- Rental Management Setup - General Tab:

- Rental FA Transfer Mandatory field must be enabled
- Default FA Transfer In-Transit must be populated with an In-Transit Location Code

- Rental Management Setup - Numbering Tab

The following fields are mandatory when the Rental FA Transfer Mandatory field is enabled. Should the No. Series not be entered an error will occur when closing the Rental Management Setup page.

- Rental FA Trans. Shipment Nos.
- Rental FA Trans. Receipt Nos.

To learn how to setup the Rental Management fields for the Rental FA Transfers, see ODT Rental Online Help, Setup Rentals, Financials Setup for Rentals.

- Rental FA Transfer Journal Batch. The batches can only be setup from the Journal.

The Default Batch is automatically setup, when the Rental FA Transfer Journal is opened for the first time, or when the first return to a different rental location is posted. Additional Batches can be setup by using the look-up in the Batch Name field.

The following picture is an example of the above setups on Rental Management Setup.

General

Show more

Use Unit Rental Terms

☒

Allow Unit Overbooki...

☐

Linked Term Time Tol...

15 minutes

Default Min. Rental D...

1 second

Return Day Billable

☒

Location Mandatory

☒

Default Blank Return ...

☐

Inventory Rentals Loc...

RENTRESERV

Inventory Rentals In-T...

RENT.LOG

Rental FA Transfer Ma...

☒

Default FA Transfer In...

OWN LOG.

Numbering

Rental Quote Nos.

RENT-QTE

Rental Unit Nos.

RENT-UNIT

Rental Contract Nos.

RENT-CONT

Rental Package Nos.

RENT-PKG

Rental Invoice Nos.

RENT-INV

Rental FA Trans. Ship...

RENT-FAS

Rental Delivery Nos.

RENT-DEL

Rental FA Trans. Recei...

RENT-FAR

Rental Return Nos.

RENT-RTN

4.8.1.3.

Rental FA Transfer Journal Menu and Fields

The Rental FA Transfer Journal Menu Options:

- **Manage:** Contains the menu option, Delete, for deleting lines in the journal.
- **Post** is used for posting the journal which opens a page which contains the options of Ship, Receive, Ship and Receive
- **Actions:** Contains the menu option, Post.
- **Navigate:** Contains the menu option, Fixed Asset, which contains menu options for opening the Fixed Asset card or the Rental Unit card.

Manage

Post

Actions

Navigate

Fewer options

Fixed Asset

Card

Rental Unit

FA No.

FA Description

The Rental FA Transfer Journal Line fields:

- **Posting Date:** The Posting Date is automatically populated with the users work date and can be modified.
- **FA No.:** For selecting the Fixed Asset to be transferred to a different rental location.
- **FA Description:** Displays the description of the asset selected.
- **Rental Unit No.:** Displays the Rental Unit No. the asset is linked to.
- **Transfer-from Code:** Displays the current Rental Location on the asset card, which the asset is to be transferred from.
- **Shipment Date-Time:** For selecting the date that the transfer shipment is to occur on. The time is automatically set to 12:00 AM, which can be changed.
- **Transfer-to Code:** For the selection of the rental

EDIT - RENTAL FA TRANSFER JOURNAL - DEFAULT - DEFAULT JOURNAL | WORK DATE: 5/15/2020

Batch Name

DEFAULT

Manage

Post

Actions

Navigate

Fewer options

Posting Date	FA No.	FA Description	Rental Unit No.	Transfer-from Code	Shipment Date-Time	Transfer-to Code	Expected R Date-Time
5/15/2020							

location the asset and rental unit are to be transferred to.

Rental FA Transfer Journal Line fields continued:

- Expected Receipt Date-Time: For selecting the date that the transfer receipt is expected to occur on. The time is automatically set to 12:00 AM, which can be changed.
- In-Transit Code: The Default FA Transfer In-Transit Location specified on Rental Management Setup defaults to this field. The In-Transit Code can be modified.
- Ship: When checked indicates the transfer is to be shipped when posting the journal.
- Receive: When checked indicates the transfer is to be received when posting the journal.
- Shipped: Displays whether the transfer has been shipped. When checked the transfer has been shipped.
- Received: Displays whether the transfer has been received. When checked the transfer has been received.

Expected Receipt Date-Time	In-Transit Code	Ship	Receive	Shipped	Received
	OWN LOG.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.8.2. How to Transfer a Fixed Asset Using the Rental FA Transfer Journal

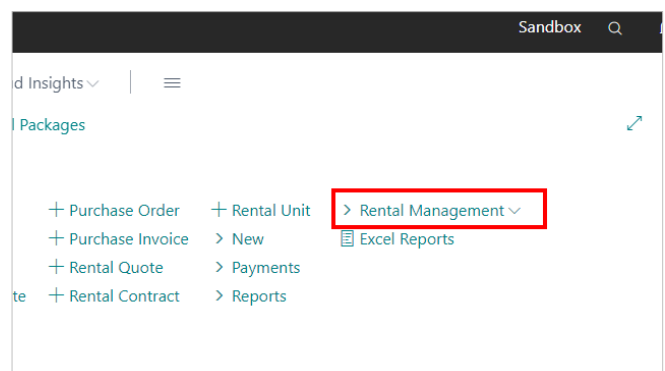
4.8.2.1. How to Process a Rental FA Transfer Journal

Business Manager Profile

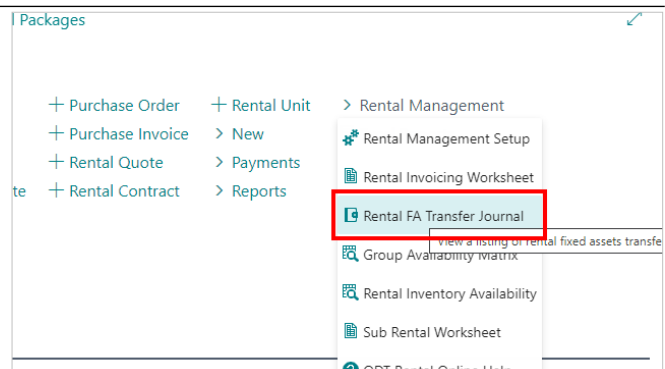
The following demonstrates the entry and processing of the transfer of a Fixed Asset linked to a Rental Unit to a different rental location.

In the example, the Rental Unit is not on a Rental Quote or Rental Contract.

Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental FA Transfer Journal**





ODT Rentals Online Help

On the Sales Order Processor Profile, the Rental FA Transfer Journal is located in the Rentals menu at the top of the profile.

Click on the cell **Posting Date** with the value **5/5/2020**

The Posting Date is to be set to the date that the Transfer Shipment is to occur on.

Batch Name

Manage [Post](#) | Actions | Navigate | Fewer options

Posting Date	FA No.	FA Description
→ 5/5/2020		
Type the date in the format M/d/yyyy		

Click on the cell **FA No.**

Batch Name

Manage [Post](#) | Actions | Navigate | Fewer options

Posting Date	FA No.	FA Description
→ 5/5/2020		
Look up value		

Click on the link in cell **No.** with the value **RU00024-003**

Posting Date 5/5/2020 FA No. FA Description

No. ↑ Description

RU00024-001	Wacker 50Z3 Excavator
RU00024-002	Wacker 50Z3 Excavator
RU00024-003	Wacker 50Z3 Excavator
RU00024-004	Select record "RU00024-003" Drill
RU00025-002	Wacker Hammer Drill

+ New

Click on the cell **Rental Unit No.** with the value **RU00024-003**

The Rental Unit No. field will be automatically populated with the unit the asset is linked to.

..... DEFAULT

fewer options

FA Description	Rental Unit No.	Transfer-from Code	Shipment
24-003 Wacker 50Z3 Excavator	RU00024-003	WEST	
Look up value			

The journal entry allows for the entry of either the FA No. or Rental Unit No. which automatically populates the other field.

For example, if the Rental Unit No. was selected first, then the FA No. field would be automatically populated with the asset linked to the unit.



ODT Rentals Online Help

Click on the cell **Transfer-from Code** with the value **WEST**

The Rental Location on the Fixed Asset card automatically populates the Transfer-from Code field.

.....					DEFAULT
cription	Rental Unit No.	Transfer-from Code	Shipment Date-Time	Trans	
r 50Z3 Excavator	RU00024-003	WEST			

Click on the cell **Shipment Date-Time**

.....					DEFAULT
	Rental Unit No.	Transfer-from Code	Shipment Date-Time	Transfer-to Code	Expe Time
	RU00024-003	WEST			
					Type the date in the format M/d/yyyy

Click on a date in the calendar

Select the date that the transfer shipment is to occur on.

Unit No.	Transfer-from Code	Shipment Date-Time	Transfer-to Code	Expected Receipt Date- Time
24-003	WEST			

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
			6	7	8	9
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Go to today Done

Click on the cell **Transfer-to Code**

/LT				
Transfer-from Code	Shipment Date-Time	Transfer-to Code	Expected Receipt Date- Time	In-Tr
WEST	5/6/2020			OWI
Look up value				



ODT Rentals Online Help

Click on the link in cell **Code** with the value **EAST**

Select the Rental Location the asset and unit are to be transferred to.

Transfer-from Code	Shipment Date-Time	Transfer-to Code	Expected Receipt Date-Time	In-Transit Co
WEST	5/6/2020 12:00 AM	<div><div></div><div><div>Code ↑</div><div>Name</div><div>→ CENTRAL Central Warehouse</div><div>EAST East Warehouse</div><div>RE Select record "EAST" Inventory Items Rental Rese</div><div>SOUTH South Warehouse</div><div>TEMP Temporary Location</div><div>NEW</div><div>+ New</div></div></div>	5/6/2020 12:00 AM	OWN LOG.

Click on the cell **Expected Receipt Date-Time** with the value **5/6/2020 12:00 AM**

The date and time are automatically set to be the same as the Shipment Date-Time.

Shipment Date-Time	Transfer-to Code	Expected Receipt Date-Time	In-Transit Code	Ship
5/6/2020 12:00 AM	EAST	5/6/2020 12:00 AM	OWN LOG.	
Type the date in the format M/d/yy				

NOTE:

Should the Expected Date be changed, then the Shipment Date-Time is automatically set to have the same date.

Click on the cell **In-Transit Code** with the value **OWN LOG.**

Transfer-to Code	Expected Receipt Date-Time	In-Transit Code	Ship	Receive	Shipped
EAST	5/7/2020	OWN LOG.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Look up value					

Click on **Ship**

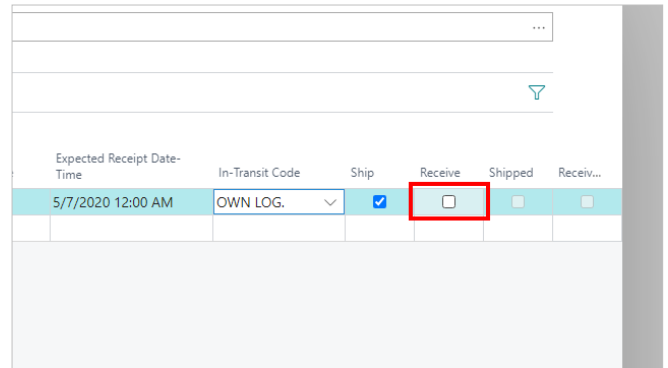
The Ship field is to be checked to indicate that the shipment is to be posted when Post is selected and either Ship or Ship and Receive is selected.

Expected Receipt Date-Time	In-Transit Code	Ship	Receive	Shipped	Receiv...
5/7/2020 12:00 AM	OWN LOG.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ODT Rentals Online Help

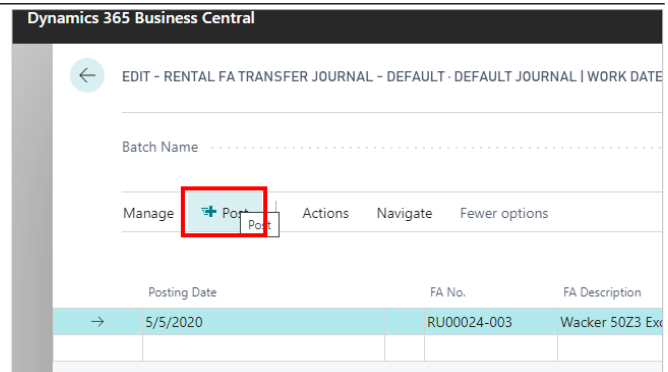
Click on **Receive**

The Receive field is to be checked to indicate that the receipt is to be posted when Post is selected and either Receive or Ship and Receive is selected.



Expected Receipt Date-Time	In-Transit Code	Ship	Receive	Shipped	Receiv...
5/7/2020 12:00 AM	OWN LOG.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on the link **Post**



Dynamics 365 Business Central

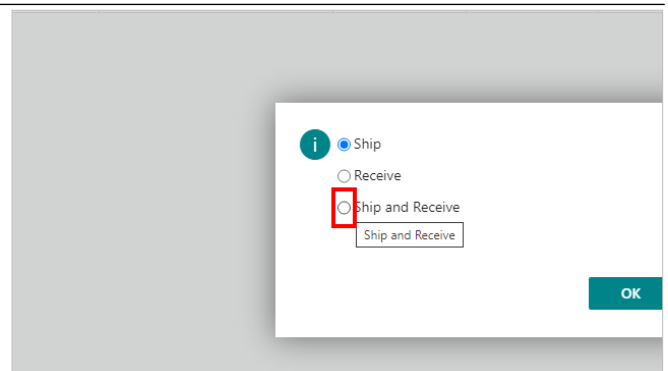
EDIT - RENTAL FA TRANSFER JOURNAL - DEFAULT - DEFAULT JOURNAL | WORK DATE

Batch Name

Manage **Post** Actions Navigate Fewer options

Posting Date	FA No.	FA Description
→ 5/5/2020	RU00024-003	Wacker 50Z3 Ex

Click on the field **Ship and Receive**



☒ Ship

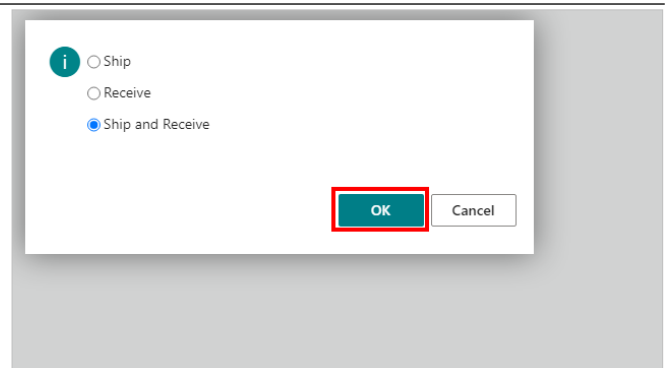
☐ Receive

☐ Ship and Receive

Ship and Receive

OK

Click on the button **OK**



☐ Ship

☐ Receive

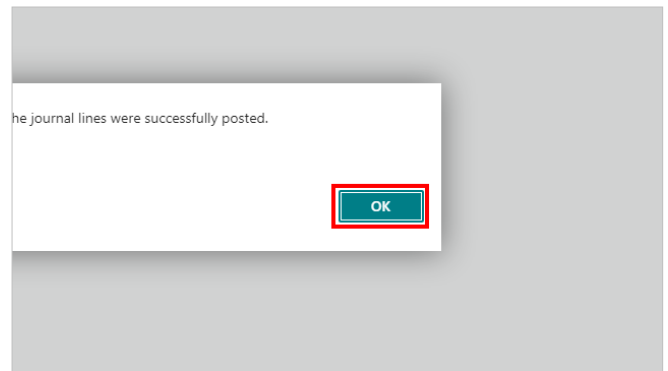
☒ Ship and Receive

OK Cancel

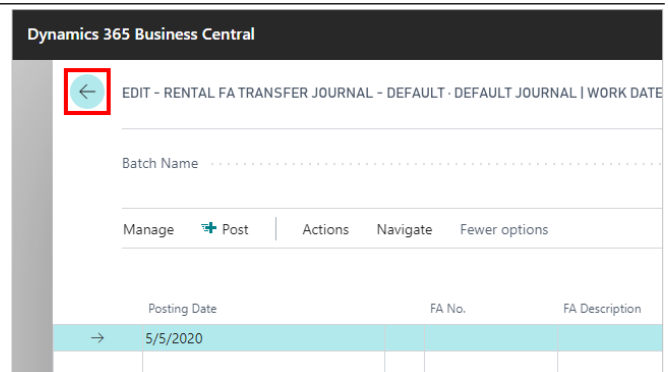


ODT Rentals Online Help

Click on the button **OK**

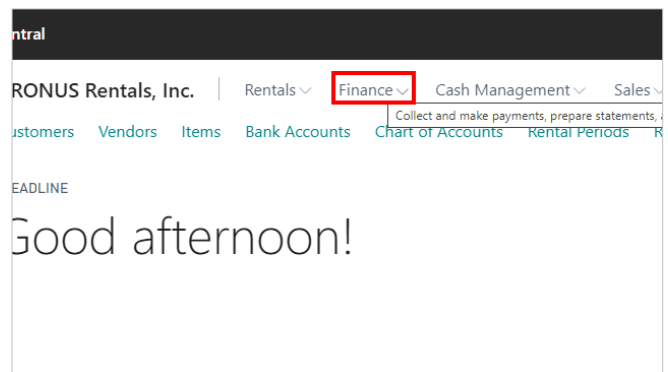


Click on the back button

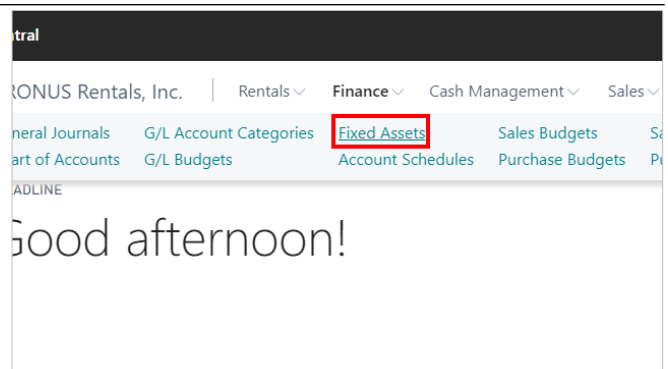


The following provides a review of the Fixed Asset card and Rental Unit card showing that the cards were updated with the rental location selected in the Transfer-to Code field on the journal line.

Click on the navigation menu item popup **Finance**



Click on the navigation menu item **Fixed Assets**





ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00024-003**

FA000140	Buckeye Ditcher-006
RU00006	Buckeye Ditcher
RU00023-003	Ford 150 Truck
RU00024-001	Wacker 50Z3 Excavator
RU00024-002	Wacker 50Z3 Excavator
RU00024-003	Wacker 50Z3 Excavator
RU00025-001	Wacker Hammer Drill
RU00025-002	Wacker Hammer Drill

Click on the field **Rental Location Code**

50Z3-003

Last Date Mo

onent

ode

EAST

Temporary L

Book

hod

Straight-Line

Book Value

ing Date

1/8/2019

Add New B

Close the Fixed Asset card and list.

Click on the navigation menu item **Rental Units**

Cash Management

Sales

Purchasing

Intelligent Cloud Insights

Accounts

Rental Periods

Rental Terms

Rental Units

Rental Packages

ACTIONS

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

Click on the link in cell **No.** with the value **RU00024-003**

RU00023-001	Ford 150 Trucks		RU00023-001
RU00023-002	Ford 150 Trucks		RU00023-002
RU00023-003	Ford 150 Trucks		RU00023-003
RU00024	Wacker 50Z3 Excavator Group		RU00024
RU00024-001	Wacker 50Z3 Excavator		RU00024-001
RU00024-002	Wacker 50Z3 Excavator		RU00024-002
RU00024-003	Wacker 50Z3 Excavator		RU00024-003
RU00025	Wacker Hammer Drill Group		RU00025
RU00025-001	Wacker Hammer Drill		RU00025-001
RU00025-002	Wacker Hammer Drill		RU00025-002



Click on the field **Location Code**

The following demonstrates the Rental Ledger Entries created on the unit by the posting of the Rental FA Transfer journal.

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Rental Ledger Entries**

Click on the cell **Entry Type** with the value **Transfer**

As the change in location was initiated from the Rental FA Transfer Journal the Entry Type is Transfer.

Entry No.	Customer Name	Entry Type	Location Code	No.
-	-	Transfer	WEST	RU00024-003
-	-	Transfer	OWN LOG.	RU00024-003
-	-	Transfer	OWN LOG.	RU00024-003
-	-	Transfer	EAST	RU00024-003



Click on the cell **Location Code** with the value **WEST**

WORK DATE: 5/5/2020

Entries - RU00024-003 · Wacker 50Z3 Excavator

Open in Excel | Actions | Navigate | Fewer options

Customer Name	Entry Type	Location Code	No. ▼	Serial No.
	Transfer	WEST	RU00024-003	50Z3-003
	Transfer	OWN LOG.	RU00024-003	50Z3-003
	Transfer	OWN LOG.	RU00024-003	50Z3-003
	Transfer	EAST	RU00024-003	50Z3-003

Click on the cell **Quantity** with the value **-1.00**

3 Excavator

Serial No.	Transaction DateTime	Quantity	Remaining Qty.	Open	Ren
0024-003 50Z3-003	5/5/2020 12:00 AM	-1.00	0.00	<input type="checkbox"/>	FAS
0024-003 50Z3-003	5/5/2020 12:00 AM	1.00	0.00	<input type="checkbox"/>	FAS
0024-003 50Z3-003	5/5/2020 12:00 AM	-1.00	0.00	<input type="checkbox"/>	FAS
0024-003 50Z3-003	5/5/2020 12:00 AM	1.00	0.00	<input type="checkbox"/>	FAS

Click on the cell **Rental Doc. No.** with the value **FAS00001**

Quantity	Remaining Qty.	Open	Rental Doc. No.	Rental Contract No.	Entry No. ↑
-1.00	0.00	<input type="checkbox"/>	FAS00001		101
1.00	0.00	<input type="checkbox"/>	FAS00001		102
-1.00	0.00	<input type="checkbox"/>	FAR00001		103
1.00	0.00	<input type="checkbox"/>	FAR00001		104

Note that the entry contains the Location Code that was in the Transfer-from Code field on the journal line, and the quantity is a negative, which is indicative that the entry is related to the transfer shipment.

Additionally the Rental Doc. No. field contains a number from the No Series entered in the Rental FA Trans. Shipment Nos. field on Rental Management Setup as displayed in the Rental FA Transfer Journal Overview.

The following demonstrates how to open the Posted FA Transfer Shipment document.

Click on the navigation menu item popup **Navigate**

WACKER 50Z3 EXCAVATOR | WORK DATE: 5/5/2020

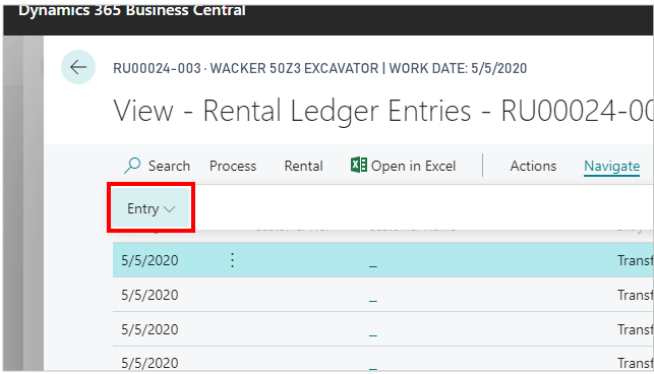
Rental Ledger Entries - RU00024-003 · Wacker 50Z3 Ex

ss Rental ☒ Open in Excel | Actions | **Navigate** | Fewer options

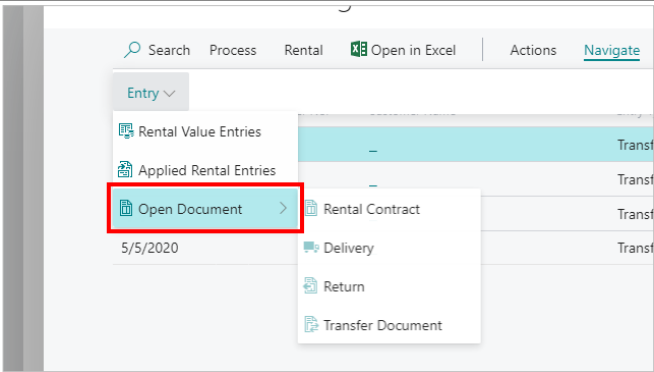
Customer No.	Customer Name	Entry Type	Location Code	No. ▼
-		Transfer	WEST	RU00024-0
-		Transfer	OWN LOG.	RU00024-0
-		Transfer	OWN LOG.	RU00024-0



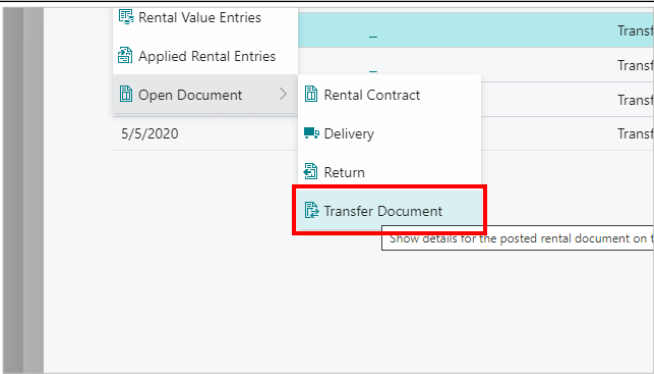
Click on the navigation menu item popup **Entry**



Click on the navigation menu item popup **Open Document**



Click on the navigation menu item **Transfer Document**



The review of the following entry is related to the Posted FA Transfer Receipt.

Click on the cell **Location Code** with the value **EAST**

Open in Excel | Actions | Navigate | Fewer options				
Customer Name	Entry Type	Location Code	No. ▼	Serial No.
	Transfer	WEST	RU00024-003	50Z3-003
	Transfer	OWN LOG.	RU00024-003	50Z3-003
	Transfer	OWN LOG.	RU00024-003	50Z3-003
	Transfer	EAST	RU00024-003	50Z3-003



Click on the cell **Quantity** with the value **1.00**

	Serial No.	Transaction DateTime	Quantity	Remaining Qty.	Open	Ren
0024-003	5023-003	5/5/2020 12:00 AM	-1.00	0.00	<input type="checkbox"/>	FAS
0024-003	5023-003	5/5/2020 12:00 AM	1.00	0.00	<input type="checkbox"/>	FAS
0024-003	5023-003	5/5/2020 12:00 AM	-1.00	0.00	<input type="checkbox"/>	FAS
0024-003	5023-003	5/5/2020 12:00 AM	1.00	0.00	<input type="checkbox"/>	FAS

1.00

Click on the cell **Rental Doc. No.** with the value **FAR00001**

	Quantity	Remaining Qty.	Open	Rental Doc. No.	Rental Contract No.	Entry No. ↑	C
M	-1.00	0.00	<input type="checkbox"/>	FAS00001		101	
M	1.00	0.00	<input type="checkbox"/>	FAS00001		102	
M	-1.00	0.00	<input type="checkbox"/>	FAR00001		103	
M	1.00	0.00	<input type="checkbox"/>	FAR00001		104	

Note that the entry contains the Location Code that was in the Transfer-to Code field on the journal line, and the quantity is positive, which is indicative that the entry is related to the transfer receipt.

Additionally the Rental Doc. No. field contains a number from the No Series entered in the Rental FA Trans. Receipt Nos. field on Rental Management Setup as displayed in the Rental FA Transfer Journal Overview.

The Posted FA Transfer Receipt can be opened using the steps provided on how to open the Posted FA Transfer Shipment.

When on a Rental Contract the unit is returned to a different location, then a Rental FA Transfer Journal is automatically created and posted.

The Posted FA Transfer Shipment and Posted FA Transfer Receipt will be created and posted.
The Rental Ledger Entries as noted above.

4.9. Transferring Rental Contracts

4.9.1. Transferring Rental Contracts Overview

4.9.1.1. Overview

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, which have been shipped or returned to the new contract.

A Transfer Worksheet is provided which by default will be populated with the Sell-To Customer, Ship-To Address and Bill-to Customer settings from the originating contract and display the rental lines, which have been shipped or returned on the contract.

When a 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.

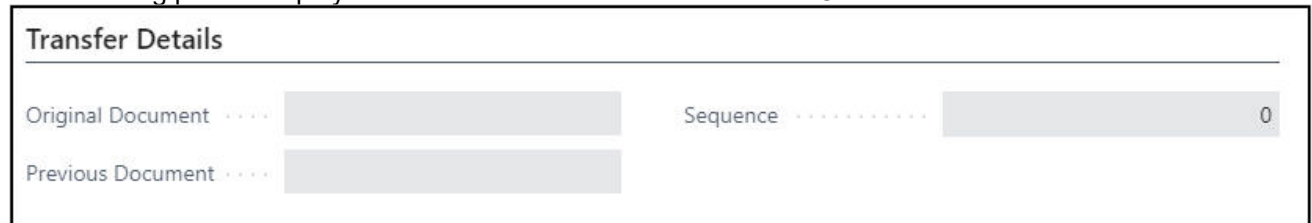
4.9.1.2. Rental Contract Transfer Information

Additional fields related to transferring rental lines are available to add to the rental lines. On the originating contract the applicable fields are populated when a rental line is transferred to another contract. The fields applicable to the new contract will be populated on the new contract.

These fields include:

- Transferred to Doc. No.
- Transferred Date
- Transferred
- Transferred From Doc. No.

The following picture displays the Transfer Details tab on the Rental Contract.



Transfer Details

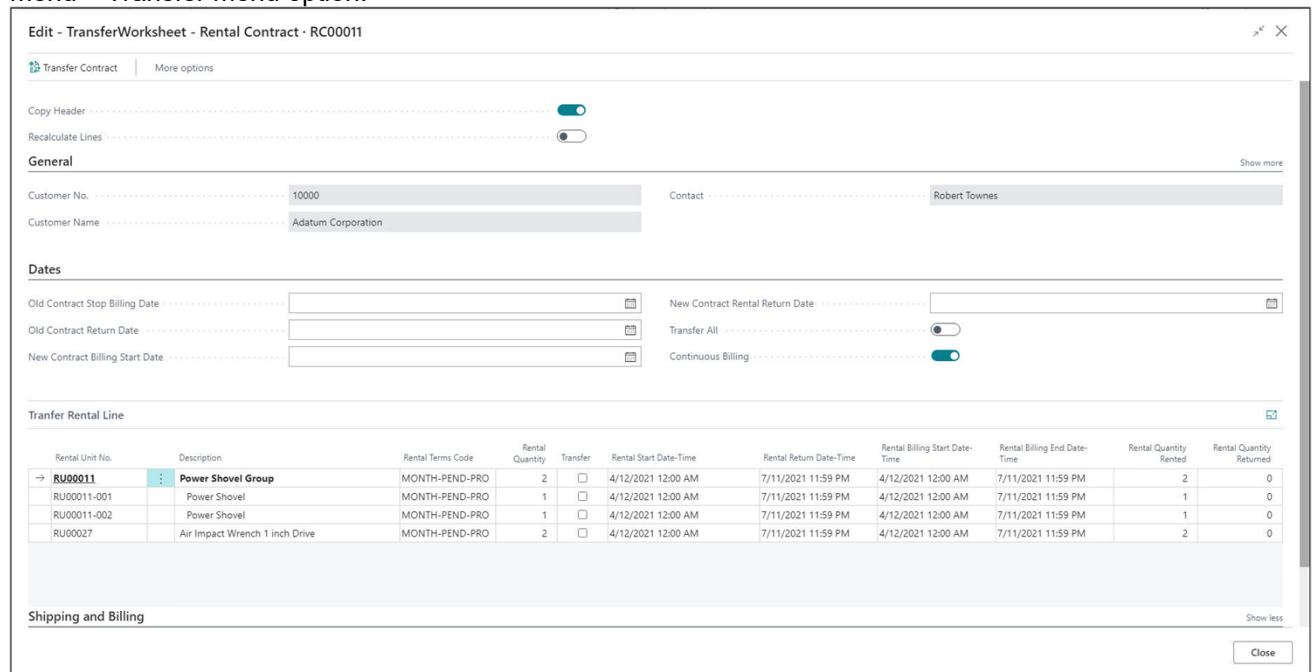
Original Document Sequence 0

Previous Document

- **Original Document** will always contain the initial originating Rental Contract number.
- **Previous Document** will contain the Rental Contract No. that the transfer to the contract occurred from.
- **Sequence** contains the sequence number of the contract transfer completed in relation to the number of transfers since the initial original document.

4.9.1.3. Transfer Worksheet

The following picture displays the Transfer Worksheet, which is accessed from the Rental Contract – Process menu – Transfer menu option.



Edit - TransferWorksheet - Rental Contract - RC00011

Transfer Contract | More options

Copy Header ☒

Recalculate Lines ☐

General Show more

Customer No. 10000 Contact Robert Townes

Customer Name Adatum Corporation

Dates

Old Contract Stop Billing Date New Contract Rental Return Date

Old Contract Return Date Transfer All ☐

New Contract Billing Start Date Continuous Billing ☒

Transfer Rental Line Show less

Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Rental Return Date-Time	Rental Billing Start Date-Time	Rental Billing End Date-Time	Rental Quantity Rented	Rental Quantity Returned
→ RU00011	Power Shovel Group	MONTH-PEND-PRO	2	<input type="checkbox"/>	4/12/2021 12:00 AM	7/11/2021 11:59 PM	4/12/2021 12:00 AM	7/11/2021 11:59 PM	2	0
RU00011-001	Power Shovel	MONTH-PEND-PRO	1	<input type="checkbox"/>	4/12/2021 12:00 AM	7/11/2021 11:59 PM	4/12/2021 12:00 AM	7/11/2021 11:59 PM	1	0
RU00011-002	Power Shovel	MONTH-PEND-PRO	1	<input type="checkbox"/>	4/12/2021 12:00 AM	7/11/2021 11:59 PM	4/12/2021 12:00 AM	7/11/2021 11:59 PM	1	0
RU00027	Air Impact Wrench 1 inch Drive	MONTH-PEND-PRO	2	<input type="checkbox"/>	4/12/2021 12:00 AM	7/11/2021 11:59 PM	4/12/2021 12:00 AM	7/11/2021 11:59 PM	2	0

Shipping and Billing Show less

Close

The worksheet provides various options for transferring including:

Copy Header: When enabled will copy the header of the originating contract when transferring to the same Customer. The copy header will copy all header settings including include Dimensions, Comments, Links,



Notes and Attachments to the new contract.

The exceptions are the Sell-to Customer, Ship-to Address and Bill-to Customer, which are copied from the worksheet. When disabled, then a different Sell-to Customer can be selected on the worksheet.

Recalculate Lines: This field is disabled by default, when transferring the same Sell-to Customer, however, can be enabled. When the Sell-to Customer, Ship-to Address or Bill-to Customer is changed, then the Recalculate Lines is automatically enabled and cannot be disabled due to tax implications.

Date fields for specifying 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 contract.

Transfer All: When enabled will flag the Transfer field on all the Transfer Rental Line records.

Continuous Billing: This field is enabled by default and can be disabled. When enabled will enforce continuous billing from the originating contract meaning that the New Contract Billing Start Date cannot overlap the Old Contract Stop Billing Date.

When a rental invoice has been posted and a New Contract Billing Start Date is entered that overlaps the posted invoice dates, then the Rental Billing Start Date on the new contract rental lines will be set to the day after the end billing date of the invoice.

When an Advanced Proforma exists and a date is entered in the Old Contract Stop Billing Date or New Contract Start Billing Date that is within the Advance Proforma date range, then the date will be updated to ensure that the billing dates on the new contract will not overlap the date range of the Advanced Proforma invoice.

The Auto Credit Memo functionality, if enabled on Rental Management Setup, will not be ran when transferring contract lines when the Continuous Billing field is enabled. This is to ensure continuous billing occurs.

Ship-to:

The Ship-to option defaults from the contract that the rental lines will be transferred from and can be changed.

IMPORTANT:

Currently when a contract, with the Ship-to option set to Alternative Shipping Address, is to be transferred to another contract for a different customer, the following steps must be followed on the Transfer Worksheet.

- First, set the Ship-to option to Custom Address
- Second, disable the Copy Header and select the new Customer No, that the new contract is to be created for.

The Ship-to option will automatically be set to Default (Sell-to Address) when the new Customer No. is selected.

When a contract, with the Ship-to option set to Alternative Shipping Address, is to be transferred to another contract for the same customer, however, the Ship-to is to be changed to either Default (Sell-to Address) or a different Alternative Ship-to Address, then the following steps must be followed on the Transfer Worksheet.

- First, set the Ship-to option to Custom Address
- Then the Ship-to can be changed to either Default (Sell-to Address), if applicable
- If the Ship-to Code is to be a different Alternative Ship-to Address than on the originating contract, then re-select Alternative Ship-to Address option and select the Code.

Bill-to:

The Bill-to field is automatically set based on the Bill-to Customer on the contract the transfer is occurring from. If the Bill-to Customer on the contract is the default customer, then the Bill-to option on the Transfer worksheet



will be set to Default (Customer). If the Bill-to Customer is not the default customer, then the Bill-to option on the Transfer Worksheet will be set to Another Customer.

The Bill-to option can be changed. If it is changed, then the Recalculate Lines on the Transfer Worksheet will be enabled and cannot be modified. This is to ensure that the applicable taxes are applied should the Bill-to Customer have different tax settings.

If it is set to Another Customer, then the Customer No. can be changed. If the Bill-to is set to Another Customer and the Customer No. is changed, then the Recalculate Lines on the Transfer Worksheet will be enabled and cannot be modified. This is to ensure that the applicable taxes are applied should the Bill-to Customer have different tax settings.

The following fields are available to be added to the Transfer Rental Lines using Personalize.

- Rental Billing Start Date-Time
- Rental Billing End Date-Time

4.9.1.4. Restrictions and Conditions for Transferring Rental Contracts

The following covers the restrictions and conditions on transferring:

- Rental Lines that cannot be transferred include units which have not been shipped, units returned during the swap function, and unit lines with Metered Usage Pricing.
- The transferring of Rental Packages is restricted to the full package and all components must be on rent. If some of the components have been returned, the package transfer is disallowed.
- Sales Lines are not transferred.
- Rental Kits - Sales Lines are not transferred. However, if Recalculate Rental Lines on the worksheet is enabled and a rental unit transferred has a Rental Kit, then the lines will be auto created on the new contract.
- Unit rental lines with Periodic Usage pricing and Standby pricing, if applicable, can only be transferred to the same customer.

If on the originating contract there are Periodic Usage entries which have not been invoiced that are equal to or later than the New Contract Start Billing Date, then a message is provided that allows the user to select whether these entries will be transferred to the new contract or not.

If the user chooses to not transfer the Periodic Usage Entries, then the entries are not transferred and are deleted on the originating contract.

- Unit rental lines with Rental Calendar Entries that have not been invoiced which are equal to or later than the New Contract Start Billing Date can be transferred.

A message is provided that allows the user to select whether these entries will be transferred to the new contract or not. If the user chooses to not transfer the Rental Calendar Entries, then the entries are not transferred and are deleted on the originating contract.

4.9.2. How to Process a Transfer to the Same Customer

4.9.2.1. Overview

The examples included demonstrate processing a transfer of rental lines from one contract to another which will have the same customer.



Click on the link **Open the date picker for Posting Date**

ns

on

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Advanced Proforma

Click on a date in the calendar

4/12/2021

April 2021

Su Mo Tu We Th Fr Sa

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30

Go to today Done

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Start Date	No. of Periods	Rental Return Date
Portable Generators	MONTH-PEND-PRO	2	EAST	4/12/2021		6/11/2021
18 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	4/12/2021		6/11/2021

Click on the navigation menu item popup **Process**

Dynamics 365 Business Central

Rental Contract | Work Date: 6/30/2021

Rental Contract · RC00012

Process Contract Rental Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/24/2021

Click on the navigation menu item **Transfer**

options

Print Pick List... Copy Document Transfer

poration

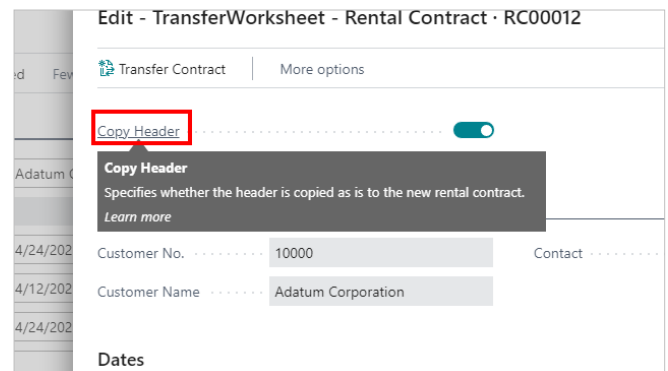
Rental Terms Code

Deposit Amount

Contract Total

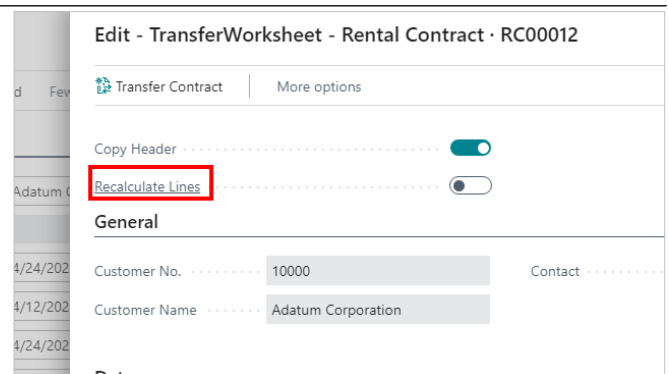
Click on the link **Copy Header**

By default the Copy Header field is enabled, which means all Dimensions, Comments, Links, Notes and Attachments will be copied to the new contract. To specify that these are not to be copied to the new contract, then disable the field.

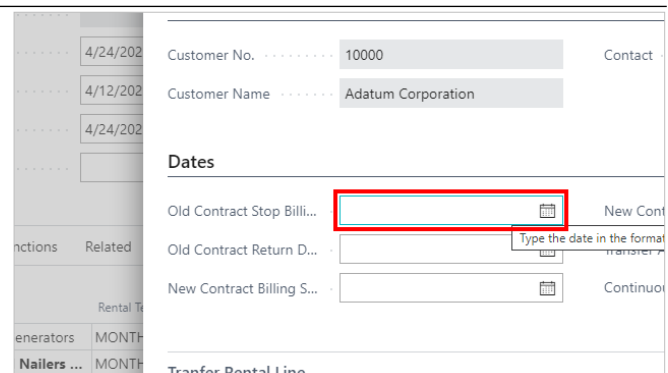


Click on the link **Recalculate Lines**

The Recalculate Lines field is disabled by default, which means that if prices were overridden on the old contract rental lines, then those prices will transfer to the new contract. Also if Additional Notes or Attachments were added to the lines being transferred, they would be transferred as well.

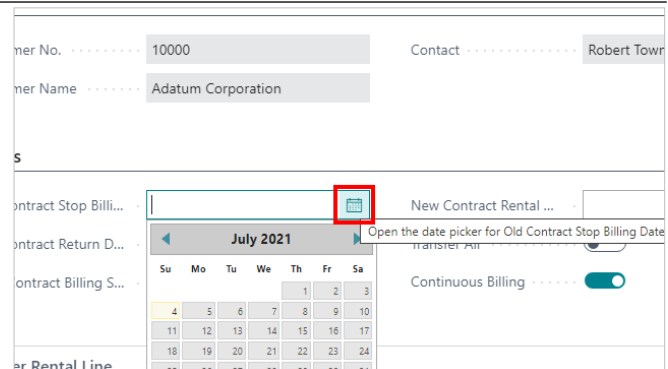


Click on the field **Old Contract Stop Billing Date**



Click on the link **Open the date picker for Old Contract Stop Billing Date**

Select the date that is to be the last date billable (Rental End Billing Date) on the old contract.





ODT Rentals Online Help

Click on a date in the calendar

For this example the last date billable is April 24.

Contract Stop Billing: [Calendar icon]

Contract Return Date: [Calendar icon]

Contract Billing Start: [Calendar icon]

Rental Line

Rental Unit	Description	Code	Rental Quantity	Transfer	Rental Start Date-Time
001	Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM

Click on the field **Old Contract Return Date**

Customer No.: 10000

Customer Name: Adatum Corporation

Dates

Old Contract Stop Billing: 4/24/2021

Old Contract Return Date: [Calendar icon]

New Contract Billing Start: [Calendar icon]

Transfer Rental Line

Click on the link **Open the date picker for Old Contract Return Date**

Contract Stop Billing: 4/24/2021

Contract Return Date: [Calendar icon]

Contract Billing Start: RC00058

Rental Line

Rental Unit	Description	Code	Rental Quantity	Transfer	Rental Start Date-Time
001	Wacker 50Z3 Excavator PU	MULTI COI	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM

Click on a date in the calendar

Select the date the Rental Units on the lines selected are to be returned on the old contract.

Contract Stop Billing: 4/24/2021

Contract Return Date: [Calendar icon]

Contract Billing Start: RC00058

Rental Line

Rental Unit	Description	Code	Rental Quantity	Transfer	Rental Start Date-Time
001	Wacker 50Z3 Excavator PU	MULTI COI	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM
J00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM



ODT Rentals Online Help

Click on the field **New Contract Billing Start Date**

The screenshot shows the 'New Contract Billing Start Date' field highlighted with a red box. The field is located in the 'Dates' section of the form. The 'Old Contract Stop Billing' field is set to 4/24/2021. The 'Old Contract Return Date' field is set to 4/24/2021. The 'New Contract Billing Start Date' field is empty and highlighted with a red box. The 'Transfer Rental Line' section is visible below the dates section.

Click on a date in the calendar

Select the date on which the billing is to commence (Rental Billing Start Date) on the new contract. As the Continuous Billing Date is not enabled, the date does not have to be the day after the Old Contract Stop Billing Date.

The screenshot shows the 'New Contract Billing Start Date' field highlighted with a red box. A calendar pop-up is displayed, showing the date 4/25/2021 selected. The calendar is for April 2021. The 'Transfer Rental Line' section is visible below the calendar.

Click on the field **New Contract Rental Return Date**

The screenshot shows the 'New Contract Rental Return Date' field highlighted with a red box. The field is located in the 'New Contract Rental' section of the form. The 'Transfer All' checkbox is checked. The 'Continuous Billing' checkbox is checked. The 'New Contract Rental' field is empty and highlighted with a red box.

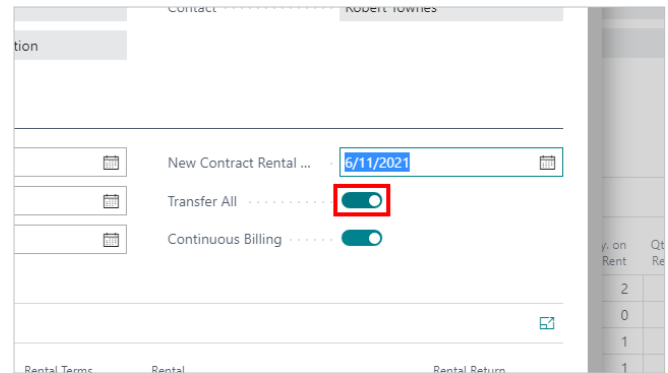
Click on a date in the calendar

Select the date which is to populate the Rental Return Date on the the lines on the new contract.

The screenshot shows the 'New Contract Rental Return Date' field highlighted with a red box. A calendar pop-up is displayed, showing the date 6/11/2021 selected. The calendar is for June 2021. The 'Transfer Rental Line' section is visible below the calendar.

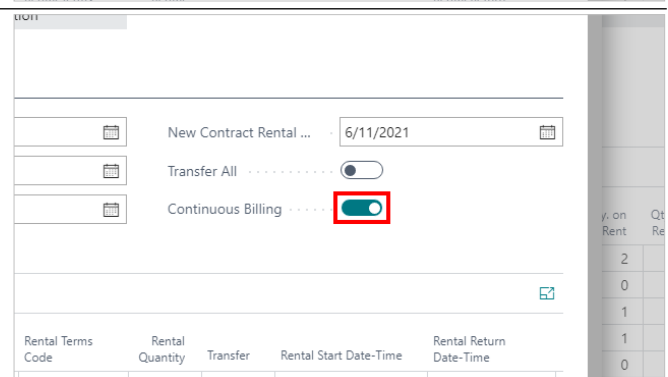
Click on the toggle field

When only some of the rental lines are to be transferred to the new contract, and the Transfer All field is enabled, then disable the field by clicking on the toggle field.



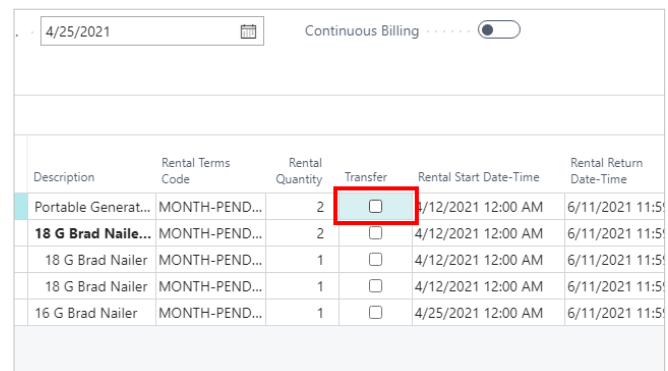
Click on the toggle field

The Continuous Billing field is enabled by default. If continuous billing is not required, then click on the toggle field to disable it.



To specify which lines are to be transferred to the new contract click on the Transfer box. When the lines include a group, then if the Transfer box is clicked on the group line all child lines will be checked as well. If only some of the child lines of the group are to be transferred, then uncheck the lines which are not to be transferred.

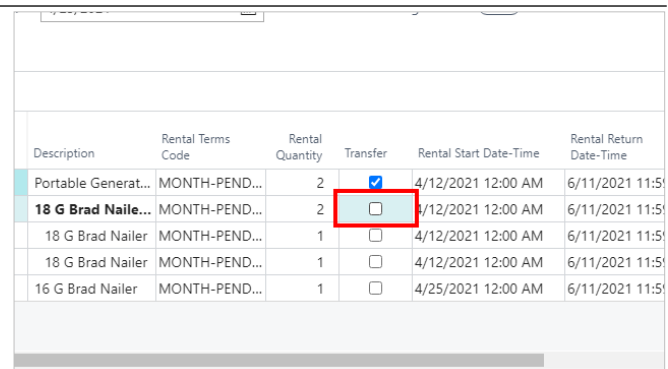
Click on **Transfer**



Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Rental Return Date-Time
Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
16 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5

Click on **Transfer**

When the Transfer boolean box on a group line is checked, then all child unit lines will be checked as well, if they have been shipped. If any of the group child lines are not to be transferred, then uncheck the Transfer box.



Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Rental Return Date-Time
Portable Generat...	MONTH-PEND...	2	<input checked="" type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer...	MONTH-PEND...	2	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
16 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5

Click on the cell **Transfer** with the value **on**

Note that the Transfer boolean box cannot be checked on the last line. This is as the Rental Unit on the line had not been shipped. Units that are not shipped cannot be transferred.

Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Rental Return Date-Time
Portable Generat...	MONTH-PEND...	2	<input checked="" type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nail...	MONTH-PEND...	2	<input checked="" type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input checked="" type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input checked="" type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5
16 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	4/12/2021 12:00 AM	6/11/2021 11:5

Click on the navigation menu item **Transfer Contract**

Work Date: 4/12/2021

Contract · RC00015

Transfer Contract

Copy Header

Recalculate Lines

General

Customer No. 10000

Click on the button **OK**

The message will contain the Rental Contract No. that was created when the transfer was processed. In this example the Rental Contract created was RC00013.

Locat	Code	Tr...	de	Tax Group Code
2	EAST			SUPPLI
2		4/12/2021	6/11/2021	0.00
1	EAST	4/12/2021	4/24/2021	0.00
1	WEST	4/12/2021	4/24/2021	0.00
1	EAST	4/12/2021	6/11/2021	0.00
				500.00

4.9.2.3. Review of Rental Contracts Transferred From and To

There are fields related to the transferring of rental lines, which can be added to the rental lines using Personalize. These fields provide an audit trail of the transfers at the Rental Line level.

These fields include:

- Transferred, which will be checked if the rental line has been transferred to another contract.
- Transferred Date, which will display the date the transfer occurred on.
- Transferred to Doc. No., which will display the Rental Contract No. that the rental line was transferred to.
- Transferred From Doc. No., which will display the Rental Contract No. the rental line was transferred from.

The following is a review of the contract that the lines were transferred from with the fields above added to the rental lines.



Click on the cell **Transferred Date** with the value **4/24/2021**

Note that on the rental lines that were transferred that the Transferred field is checked and the Transferred Date and Transferred to Doc. No. are populated.

Department Code	Customergro... Code	Transferred	Transferred Date	Transferred To Doc. No.	Transferred From Doc. No.
SALES	SMALL	<input checked="" type="checkbox"/>	4/24/2021	RC00013	
SALES	SMALL	<input checked="" type="checkbox"/>	4/24/2021	RC00013	
SALES	SMALL	<input checked="" type="checkbox"/>	4/24/2021	RC00013	
SALES	SMALL	<input checked="" type="checkbox"/>	4/24/2021	RC00013	
SALES	SMALL	<input type="checkbox"/>			

The following is a review of the Rental Contract, RC00013, created during the transfer process.

Click on the field **Posting Date**

The Posting Date is set from the date specified in the New Contract Start Billing Date field on the Transfer Worksheet.

30/2021

t · RC00013

Actions Related Fewer options

4/25/2021

4/25/2021

4/25/2021

Click on the cell **Rental Start Date** with the value **4/25/2021**

The Rental Start Date is set from the date specified in the New Contract Start Billing Date field on the Transfer Worksheet.

Rental Unit No.	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
PG-001	EAST	4/25/2021		6/12/2021	500.
RU00008	EAST	4/25/2021		6/12/2021	150.
RU00008-001	EAST	4/25/2021		6/12/2021	150.
RU00008-002	EAST	4/25/2021		6/12/2021	150.

Click on the cell **Rental Return Date** with the value **6/12/2021**

The Rental Return Date is set from the date specified in the New Contract Rental Return Date field on the Transfer Worksheet.

Rental Unit No.	Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Unit Price
PG-001	EAST	4/25/2021		6/12/2021	500.00
RU00008	EAST	4/25/2021		6/12/2021	150.00
RU00008-001	EAST	4/25/2021		6/12/2021	150.00
RU00008-002	EAST	4/25/2021		6/12/2021	150.00



ODT Rentals Online Help

Click on the cell **Rental Billing Start Date** with the value **4/25/2021**

The Rental Billing Start Date is set from the date specified in the New Contract Start Billing Date field on the Transfer Worksheet and the Rental Billing End Date defaults from the Rental Return Date.

Location Code	Rental Start Date	No. of Periods	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Curr... Code	Tax Gro Code
EAST	4/25/2021		6/12/2021	4/25/2021	6/12/2021	500.00		SUP
EAST	4/25/2021		6/12/2021	4/25/2021	6/12/2021	150.00		SUP
EAST	4/25/2021		6/12/2021	4/25/2021	6/12/2021	150.00		SUP
EAST	4/25/2021		6/12/2021	4/25/2021	6/12/2021	150.00		SUP

Click on the cell **Transferred Date** with the value **4/24/2021**

The Transferred Date is displays the date of the transfer from the original contract.

The Transferred From Doc. No. is populated with the Rental Contract No. the line was transferred from.

Department Code	Customergro... Code	Transferred*	Transferred Date	Transferred To Doc. No.	Transferred From Doc. No.
SALES	SMALL	<input type="checkbox"/>	4/24/2021		RC00012
SALES	SMALL	<input type="checkbox"/>	4/24/2021		RC00012
SALES	SMALL	<input type="checkbox"/>	4/24/2021		RC00012
SALES	SMALL	<input type="checkbox"/>	4/24/2021		RC00012

The following provides an overview of the Transfer Details tab fields on the new contract.

Click on the field **Original Document**

Note that the Original Document field is populated with the Rental Contract that this contract was created from as this was the first transfer from that contract. This will remain constant for any subsequent transfers.

.....	RC00012
.....	RC00012

Click on the field **Previous Document**

The Previous Document field is displaying the same Rental Contract No. as the Original Document field as this was the first transfer from the initial contract.. This field will always display the contract that the rental lines were transferred from.

.....	RC00012
.....	RC00012



Click on the field **Sequence**

The sequence number of the contract transfer completed displays the number in relation to the number of transfers since the original document. As this contract was the first contract created from the original document the number is 1.

A screenshot of a web form with a red rectangular box highlighting a field containing the number '1'. Below the box, a small '1' is also visible.

4.9.2.4. Transferring Rental Lines from the New Contract with Continuous Billing

The following example demonstrates the transferring of all the rental lines from the previously created contract to the same Customer. However, will be for a different Ship-to Address.

Prior to transferring from the contract an invoice will be posted for the first rental period of April 25 to May 24. The transfer will be set for the billing to be continuous from this contract.

Click on the field **Posting Date**

A screenshot of a web form with a red rectangular box highlighting a date field containing '4/25/2021'. Above the box, a dropdown menu shows 'Adatum Corporation'. To the right of the box, a small calendar icon is visible.

Click on the link **Open the date picker for Posting Date**

A screenshot of a web form with a red rectangular box highlighting a date field containing '4/25/2021'. To the right of the box, a small calendar icon is visible. Below the box, a date picker is open, showing a calendar for April 2021. The date '4/25/2021' is highlighted in blue. To the right of the date picker, a 'Next' button is visible.

Click on the link **Next**

A screenshot of a web form with a red rectangular box highlighting a 'Next' button. The button is located at the bottom right of the page. Above the button, a date picker is open, showing a calendar for April 2021. The date '4/25/2021' is highlighted in blue. To the right of the date picker, a 'Next' button is visible.



Click on a date in the calendar

Unit	Stan... Text Code	Description	Rental Terms Code	Quantity	Location Code	Rental St Date
01	:	Portable Generators	MONTH-PEND-PRO	2	EAST	4/25/20
008	:	18 G Brad Nailers ...	MONTH-PEND-PRO	2	EAST	4/25/20

Click on the navigation menu item popup **Rental**

Rental Contract · RC00013

Process Contract **Rental** Actions Related Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 5/24/2021

Click on the navigation menu item **Invoice**

Rental Contract · RC00013

Process Contract Rental Actions Related Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice and Print

Ship and Send... Return and Send... Invoice Invoice and Send...

Quote No.

Posting Date 5/24/2021

Order Date 4/25/2021

Click on the button **Yes**

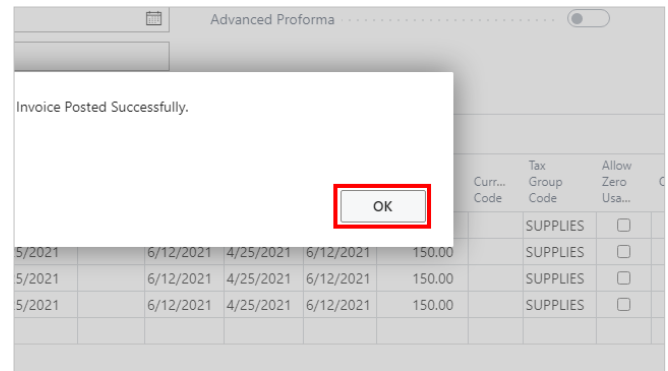
Are you sure you want to Invoice this rental contract?

Yes No

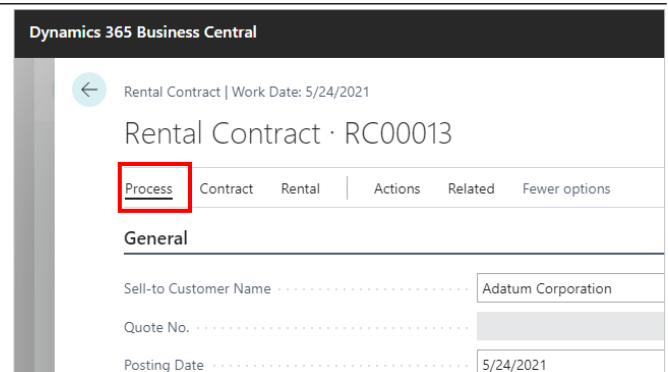


ODT Rentals Online Help

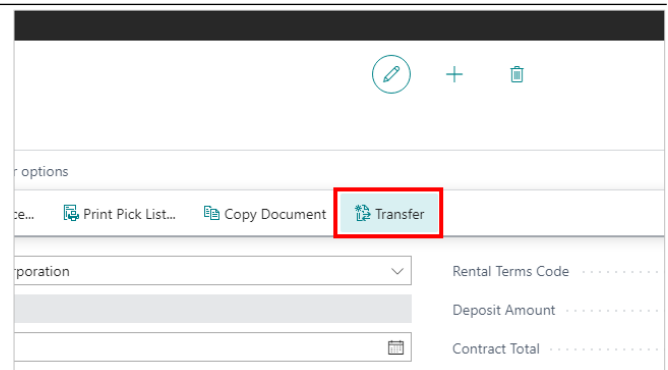
Click on the button **OK**



Click on the navigation menu item popup **Process**



Click on the navigation menu item **Transfer**

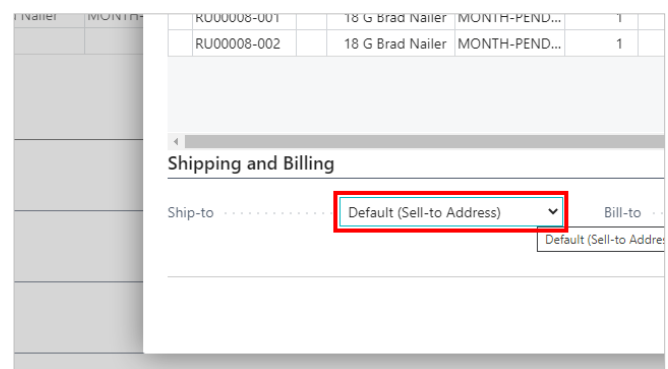


The following demonstrates what occurs when the Ship-to Address is changed.

NOTE:

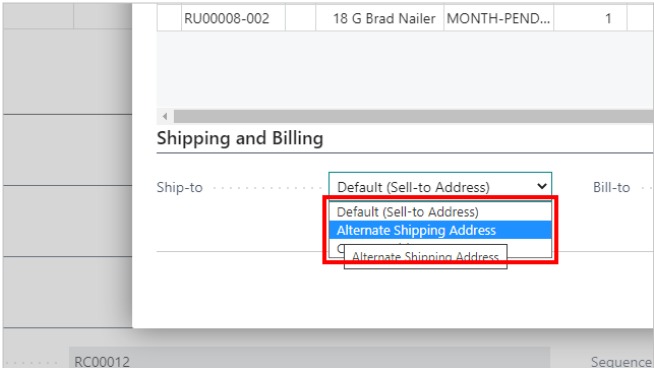
If the Bill-to Customer is changed the same change to the transfer worksheet occurs.

Click on the field **Ship-to**



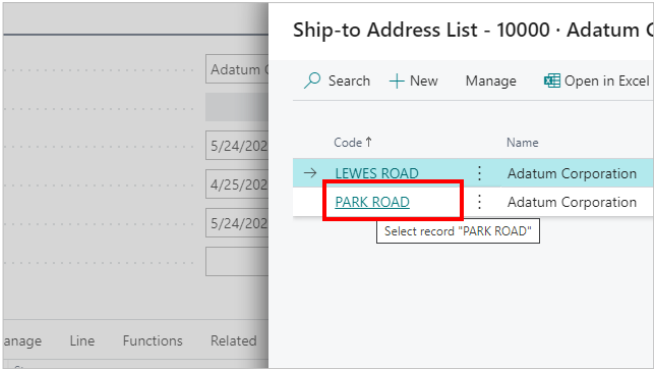


Click on the item **Alternate Shipping Address** in the list



The screenshot shows a 'Shipping and Billing' section with a 'Ship-to' dropdown menu. The menu is open, showing three options: 'Default (Sell-to Address)', 'Alternate Shipping Address', and 'Alternate Shipping Address'. The 'Alternate Shipping Address' option is highlighted in blue. A red box is drawn around the 'Alternate Shipping Address' option.

Click on the link in cell **Code** with the value **PARK ROAD**

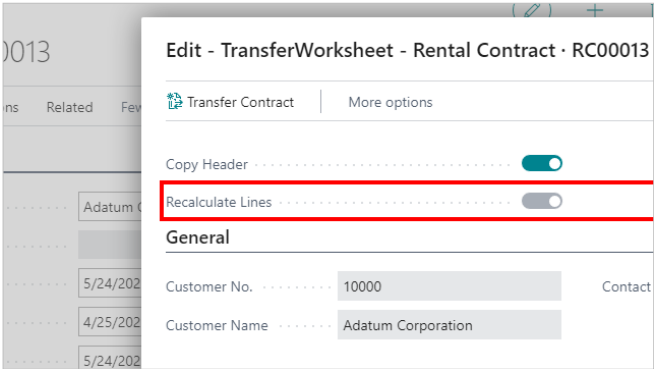


The screenshot shows a 'Ship-to Address List - 10000 · Adatum Corporation' window. It contains a table with columns 'Code' and 'Name'. The table has three rows: 'LEWES ROAD', 'PARK ROAD', and 'Adatum Corporation'. The 'PARK ROAD' row is highlighted in blue. A red box is drawn around the 'PARK ROAD' row. Below the table, there is a button labeled 'Select record "PARK ROAD"'. The 'Code' column header is highlighted in blue.

Click on **Recalculate Lines**

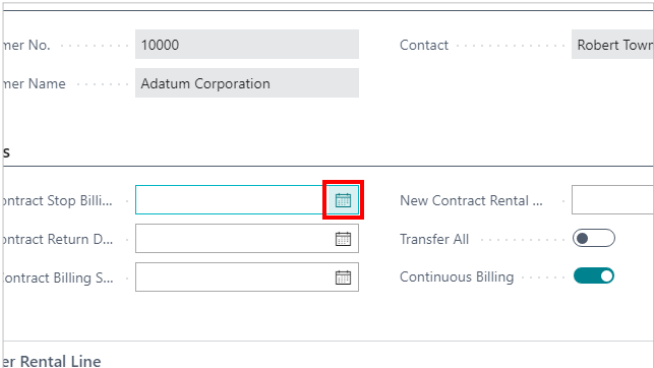
When the Ship-to Address is changed, then the Recalculate Lines field is automatically enabled and cannot be edited.

This is as the new Ship-to Address may have a different Tax Area Code which may impact the tax calculations on the contract.



The screenshot shows an 'Edit - TransferWorksheet - Rental Contract · RC00013' window. It has a 'Recalculate Lines' field with a red box around it. The 'Recalculate Lines' field is a toggle switch that is currently turned on. The 'General' section shows 'Customer No.' as 10000 and 'Customer Name' as Adatum Corporation.

Click on the link **Open the date picker for Old Contract Stop Billing Date**



The screenshot shows a 'Rental Contract' form. It has fields for 'Contract Stop Billing Date', 'Contract Return Date', and 'Contract Billing Start Date'. The 'Contract Stop Billing Date' field has a red box around its date picker icon. The 'Contract Return Date' field has a date picker icon. The 'Contract Billing Start Date' field has a date picker icon. The 'New Contract Rental' field has a date picker icon. The 'Transfer All' field has a toggle switch. The 'Continuous Billing' field has a toggle switch.



ODT Rentals Online Help

Click on a date in the calendar

As the transfer requires continuous billing, the Old Contract Stop Billing Date is to be set to the end billing date of the invoice posted.

In this example the invoice posted was for April 25 to May 24, therefore the date selected is May 24.

Rental Unit No.	Description	Rental Terms	Quantity	Transfer
PG-001	Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>

Click on the link **Open the date picker for Old Contract Return Date**

Rental Unit No.	Description	Rental Terms	Quantity	Transfer
PG-001	Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>

Click on a date in the calendar

As the transfer is for continuous billing the Old Contract Return Date should be set to the same date as the Old Contract Stop Billing Date.

In this example, May 24.

Rental Unit No.	Description	Rental Terms	Quantity	Transfer
PG-001	Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>
RU00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>

Click on the link **Open the date picker for New Contract Billing Start Date**

Rental Unit No.	Description	Rental Terms	Quantity	Transfer	Rental Start Date-Time
PG-001	Portable Generat...	MONTH-PEND...	2	<input type="checkbox"/>	
RU00008	18 G Brad Nail...	MONTH-PEND...	2	<input type="checkbox"/>	
RU00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	



ODT Rentals Online Help

Click on a date in the calendar

As the transfer is set for continuous billing the New Contract Billing Start Date is to be set to the day after the Old Contract Stop Billing Date.
In this example, May 25.

With Continuous Billing enabled and a rental invoice has been posted, if a New Contract Billing Start Date is entered that overlaps the posted invoice dates, then the Rental Billing Start Date on the new contract rental lines will automatically be set to the day after the end billing date of the invoice.

The date entered in the New Contract Billing Start Date will be disregarded.

Click on the link **Open the date picker for New Contract Rental Return Date**

Click on a date in the calendar

The New Contract Rental Return Date can be set to the same or a different return date than is on the contract the lines are being transferred from.

Click on the Transfer All toggle field

Click on the cell **Transfer** with the value **on**

When the Transfer All field is enabled, then all lines which can be transferred are automatically flagged.

NOTE:

Should there be lines where the Rental Unit has not been shipped, these lines will not be flagged as they cannot be transferred.

5/25/2021		Continuous Billing		<input checked="" type="checkbox"/>	
Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Rental Return Date-Time
Portable Generat...	MONTH-PEND...	2	<input checked="" type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nail...	MONTH-PEND...	2	<input checked="" type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input checked="" type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5
18 G Brad Nailer	MONTH-PEND...	1	<input checked="" type="checkbox"/>	4/25/2021 12:00 AM	6/11/2021 11:5

Click on the navigation menu item **Transfer Contract**

Work Date: 5/24/2021		Contract · RC00013	
Contract	Rental	Actions	Related
Name		Adatum	Transfer Rental Line
Rental Unit No.	Description	Rental Code	

Click on the button **OK**

Advanced Proforma

Rental Lines transferred successfully to Contract RC00017.

OK

					Curr... Code	Tax Group Code	Allow Zero Usa...	
5/2021	7/31/2021	5/25/2021	7/31/2021	150.00		SUPPLIES	<input type="checkbox"/>	
5/2021	7/31/2021	5/25/2021	7/31/2021	150.00		SUPPLIES	<input type="checkbox"/>	
5/2021	7/31/2021	5/25/2021	7/31/2021	150.00		SUPPLIES	<input type="checkbox"/>	

The following picture displays the Transfer fields on the rental lines of the contract RC00012, which the transfer from was processed.

Note that the Transferred Date field has been updated to the date that a transfer was processed from the contract.

And that the Transferred to Doc. No. field is populated with the Rental Contract No. created by the transfer from RC00012.

Rental Lines	Line	More options	
Rental Unit No.	Ret... Day Billa...	Department Code	Customergro... Code
→ PG-001	<input checked="" type="checkbox"/>	SALES	SMALL
RU00008	<input checked="" type="checkbox"/>	SALES	SMALL
RU00008-001	<input checked="" type="checkbox"/>	SALES	SMALL
RU00008-002	<input checked="" type="checkbox"/>	SALES	SMALL

The following picture shows the updates to the transfer fields on the rental lines on the new contract that was created.



Note that the Transferred Date is populated with the date of the transfer. And the Transferred From Doc. No. contains the Rental Contract No. of RC00013 from which the transferred was processed from.

Rental Lines		Manage	Line	Functions	Related	Fewer options				
Rental Unit No.		Ret... Day Billa...	Department Code	Customergro... Code	Transferred"	Transferred Date	Transferred To Doc. No.	Transferred From Doc. No.		
→ PG-001		<input checked="" type="checkbox"/>	SALES	SMALL	<input type="checkbox"/>	5/24/2021		RC00013		
RU00008		<input checked="" type="checkbox"/>	SALES	SMALL	<input type="checkbox"/>	5/24/2021		RC00013		
RU00008-001		<input checked="" type="checkbox"/>	SALES	SMALL	<input type="checkbox"/>	5/24/2021		RC00013		
RU00008-002		<input checked="" type="checkbox"/>	SALES	SMALL	<input type="checkbox"/>	5/24/2021		RC00013		

The following picture displays the Transfer Details tab on the new contract, RC00017.

Transfer Details			
Original Document	RC00012	Sequence	2
Previous Document	RC00013		

Note that the Original Document field contains RC00012, which the contract RC00013 was created from.

The Previous Document contains RC00013, which was the contract that RC00017 was created from using the Transfer Worksheet.

The Sequence field contains the number 2. This is as this contract was created by the second transfer from RC00013 which was created by the transfer from the original contract.

4.9.3. How to Process a Transfer to a Different Customer

4.9.3.1. Overview

The following examples demonstrate the transferring of a contract to a different Sell-to Customer.

In the first example, on the contract the rental lines are being transferred from, the Ship-to address and the Bill-to Customer are the same as the Sell-to Customer.

In the second example, on the contract the rental lines are being transferred from, the Ship-to option is set to Alternative Shipping Address with a different address than the Sell-to Customer and the Bill-to Customer is the same as the Sell-to Customer.

4.9.3.2. How to Process a Transfer to a Different Customer

This example demonstrates the transferring of rental lines from one contract to a new contract, which will be for a different Sell-to Customer.

Contract Information:

- The rental term on the contract lines is a monthly rental with periodic end prorated invoicing.
- The Rental Lines consist of a rental group with a quantity of 2.
- The rental has a Rental Start Date of April 12 and a Return Date of May 31.

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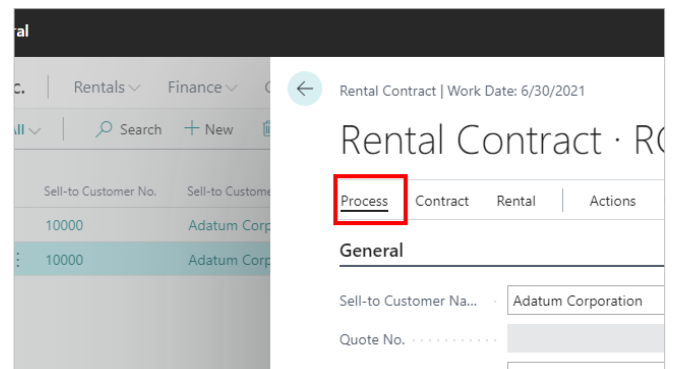
- An invoice has been posted on May 11 for the rental period of April 12 to May 11.
- The transfer will occur on May 11 and all rental lines will be transferred.

Transfer Worksheet Information:

The following settings will be used on the Transfer Worksheet.

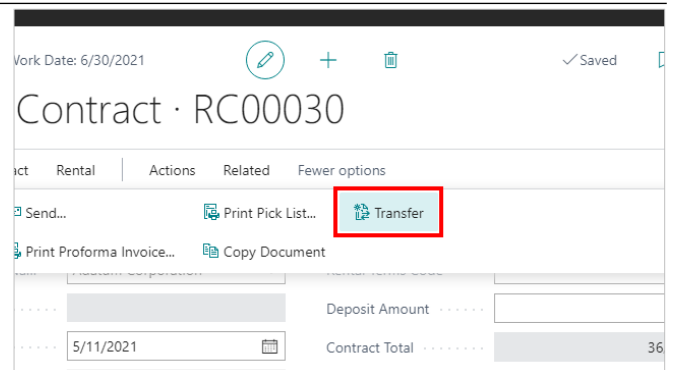
- The Copy Header will be disabled.
- The Customer No. will be changed from 10000 to 20000.
- The Recalculate Lines will automatically be enabled as the new contract is for a different customer. This is to ensure that the Tax Group and Rental Prices reflect the settings for the new customer.
- Transfer All will be enabled.
- Continuous Billing will be disabled.
- The Old Contract Stop Billing Date and Return Date will be May 11.
- The New Contract Start Billing Date will be May 16.
- The New Contract Return Date will be June 15.

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract · RC00030' page. The 'Process' button is highlighted in a red box. The page includes a navigation menu on the left with 'Rentals' and 'Finance' options. The main content area shows the contract details, including 'Sell-to Customer No.' and 'Adatum Corporation'.

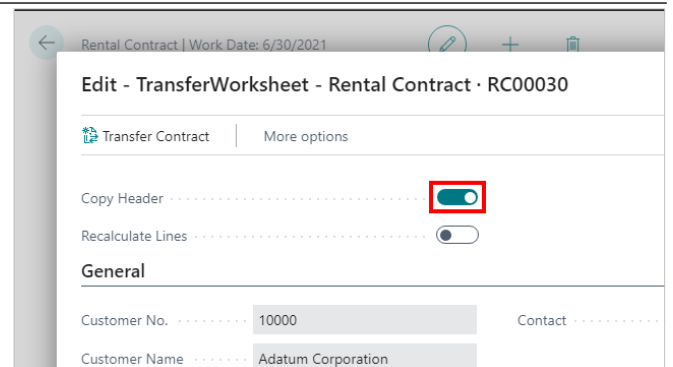
Click on the navigation menu item **Transfer**



The screenshot shows the 'Contract · RC00030' page. The 'Transfer' button is highlighted in a red box. The page includes a navigation menu on the left with 'Contract' and 'Rental' options. The main content area shows the contract details, including 'Contract Total' and '36'.

Click on the toggle field **Copy Header**

In order to select a different Sell-to Customer No. the Copy Header field must be disabled.



The screenshot shows the 'Edit - TransferWorksheet - Rental Contract · RC00030' page. The 'Copy Header' toggle field is highlighted in a red box. The page includes a navigation menu on the left with 'Transfer Contract' and 'More options' options. The main content area shows the contract details, including 'Customer No.' and 'Adatum Corporation'.




Click on the lookup button **Customer No.**

Transfer Contract | More options


Header ☐

Calculate Lines ☐

General


Customer No. 10000  Contact Robert Town

Customer Name Adatum Corporation Review or update the value for Customer No.

Contract Stop Billi...  New Contract Rental ...

Click on the link in cell **No.** with the value **20000**


General


Customer No. 10000  Contact


Customer Name

No. ↑	Name	ZIP
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		


Dates

Old Contract Stop Billi...  New Cont

Old Contract Return D...  Transfer A


New Contract Billing S...  Continu


Click on the field **Old Contract Stop Billing Date**


Customer No. 20000  Contact

Customer Name Trey Research

Dates


Old Contract Stop Billi...  New Cont

Old Contract Return D...  Transfer A


New Contract Billing S...  Continu


Transfer Rental Line


Click on the link **Open the date picker for Old Contract Stop Billing Date**

Customer No. 20000  Contact Helen Ray

Customer Name Trey Research

Contract Stop Billi...  New Contract Rental ...

Contract Return D...  Transfer All ☐

Contract Billing S...  Continuous Billing ☐

Transfer Rental Line



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Click on a date in the calendar

Select May 11 as specified in the Transfer Worksheet Information.

Dates

Old Contract Stop Billi...

Old Contract Return D...

New Contract Billing S...

Transfer Rental Line

Rental Unit No. **RU00011** : **Power Shovel G...** MONTH-PEND 2 ☐ 4/1

RU00011-001 Power Shovel MONTH-PEND 1 ☐ 4/1

Go to today Done

Rental Quantity Transfer Re

Click on the link **Open the date picker for Old Contract Return Date**

mer ID: 20000 Contact: heien kay

mer Name: Trey Research

Contract Stop Billi... 5/11/2021

Contract Return D...

Contract Billing S...

New Contract Rental ...

Transfer All ☒

Continuous Billing ☒

Transfer Rental Line

Click on a date in the calendar

Select May 11 as specified in the Transfer Worksheet Information.

Old Contract Stop Billi... 5/11/2021

Old Contract Return D...

New Contract Billing S...

Transfer Rental Line

Rental Unit No. **RU00011** : **Power Shovel** MONTH-PEND 2 ☐ 4/1

RU00011-001 Power Shovel MONTH-PEND 1 ☐ 4/1

RU00011-002 Power Shovel MONTH-PEND 1 ☐ 4/1

Go to today Done

Rental Quantity Transfer Re

Click on the link **Open the date picker for New Contract Billing Start Date**

mer Name: Trey Research

Contract Stop Billi... 5/11/2021

Contract Return D... 5/11/2021

Contract Billing S...

New Contract Rental ...

Transfer All ☒

Continuous Billing ☒

Transfer Rental Line

Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time



ODT Rentals Online Help

Click on a date in the calendar

Select May 16 as specified in the Transfer Worksheet Information.

Rental Unit No.	Rental Quantity	Transfer
RU00011	2	
RU00011-001	1	
RU00011-002	1	

Click on the link **Open the date picker for New Contract Rental Return Date**

New Contract Rental ...

Transfer All ☐

Continuous Billing ☐

Click on a date in the calendar

Select June 15 as specified in the Transfer Worksheet Information.

Rental Unit No.	Rental Quantity	Transfer	Rental Start Date-Time	Date-Time
RU00011	2	<input type="checkbox"/>	4/12/2021 12:00 AM	5/31/2021 11:59 ...
RU00011-001	1	<input type="checkbox"/>	4/12/2021 12:00 AM	5/31/2021 11:59 ...

Click on the toggle field **Transfer All**

New Contract Rental ... 6/15/2021

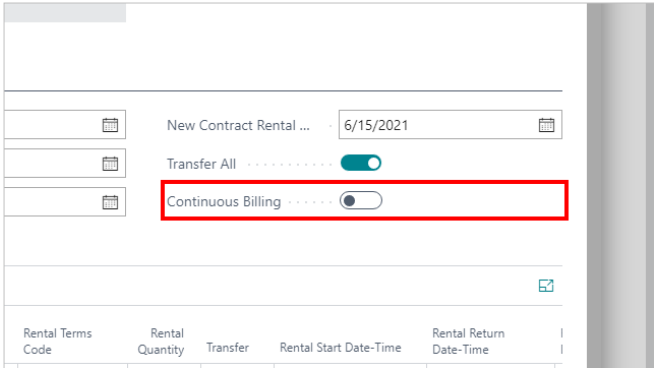
Transfer All ☒

Continuous Billing ☐

ODT Rentals Online Help

Click on **Continuous Billing**

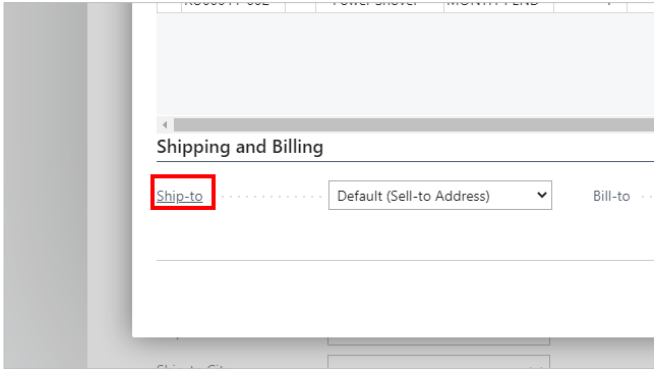
As the New Contract Start Billing Date is not the day after the Old Contract Stop Billing Date, the Continuous Billing field is disabled.



The screenshot shows a form with a date picker for 'New Contract Rental ...' set to 6/15/2021. Below it, there are two toggle switches: 'Transfer All' (which is turned on) and 'Continuous Billing' (which is turned off and highlighted with a red rectangle). At the bottom, there is a table with columns: Rental Terms Code, Rental Quantity, Transfer, Rental Start Date-Time, and Rental Return Date-Time.

Click on the link **Ship-to**

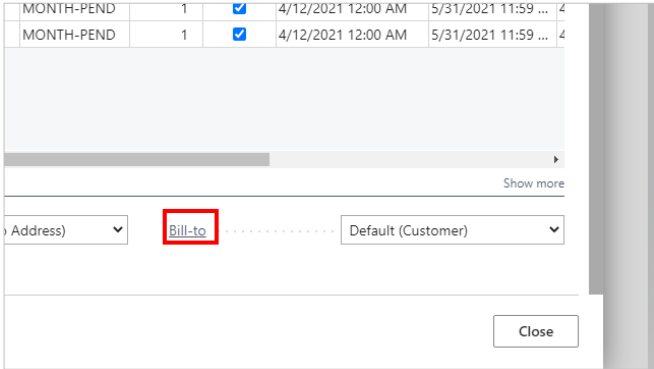
Note that Ship-to is set to Default (Sell-to Address) as on the contract there was no Ship-to Code specified.



The screenshot shows a 'Shipping and Billing' section. The 'Ship-to' dropdown menu is highlighted with a red rectangle and is set to 'Default (Sell-to Address)'. The 'Bill-to' dropdown menu is also visible.

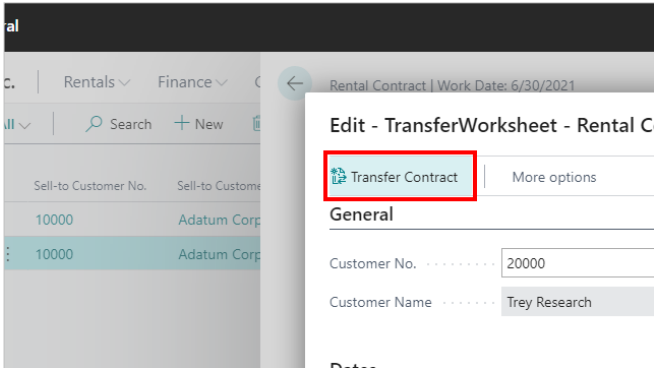
Click on the link **Bill-to**

Note that the Bill-to is set to Default (Customer) as the Bill-to Customer is the same as the Sell-to Customer on the contract.



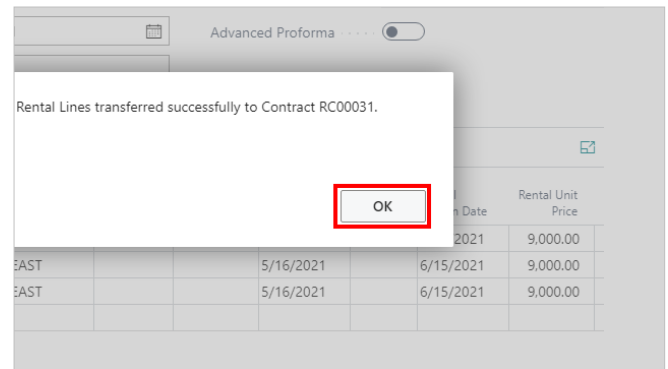
The screenshot shows a table with columns: MONTH-PEND, Quantity, and Date-Time. Below the table, there is a 'Show more' link. At the bottom, there is a 'Bill-to' dropdown menu highlighted with a red rectangle, set to 'Default (Customer)'. There is also a 'Close' button.

Click on the navigation menu item **Transfer Contract**



The screenshot shows a navigation menu with items: Rentals, Finance, and a search bar. Below the menu, there is a table with columns: Sell-to Customer No., Sell-to Customer Name, and Date-Time. The 'Transfer Contract' option is highlighted with a red rectangle. To the right, there is a 'More options' link. Below the table, there is a 'General' section with fields for Customer No. (set to 20000) and Customer Name (set to Trey Research).

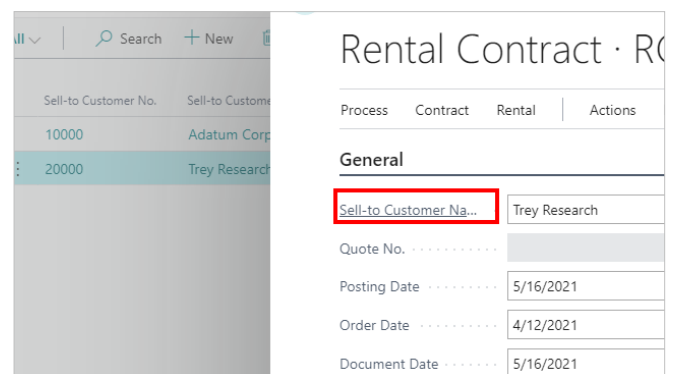
Click on the button **OK**



The following is a review of the Rental Contract created by the transfer.

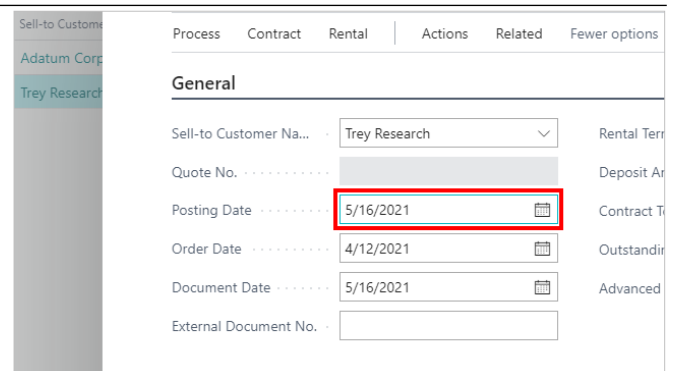
Click on the link **Sell-to Customer Name**

Note that the Sell-to Customer is the customer selected on the Transfer Worksheet.



Click on the field **Posting Date**

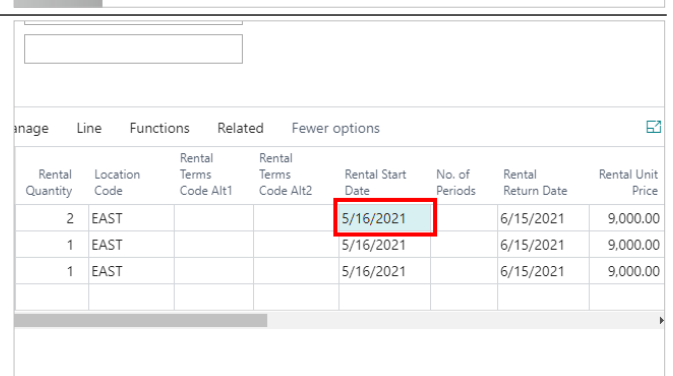
Note that the Posting Date is set to the New Contract Start Billing Date as this is the date that the new contract rental commences.



Click on the cell **Rental Start Date** with the value **5/16/2021**

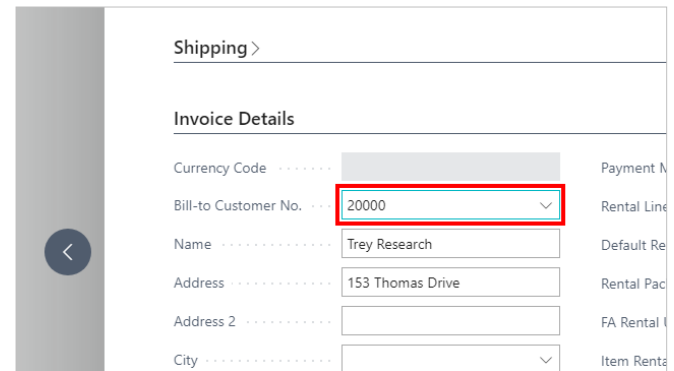
Note in the picture that the Rental Start Date is set to the New Contract Start Billing Date, which in turn automatically sets the Rental Billing Start Date to the same date.

Also note that the Rental Return Date is set to the New Contract Return Date specified in the Transfer Worksheet.



Click on the field **Bill-to Customer No.**

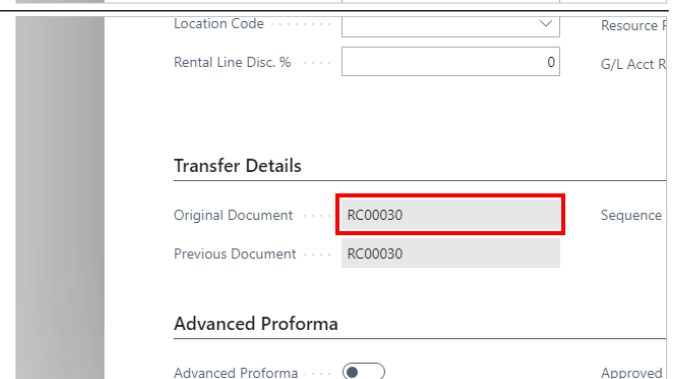
Note that the Bill-to Customer was automatically set to the same as the Sell-to Customer on the new contract.



Click on the field **RC00030**

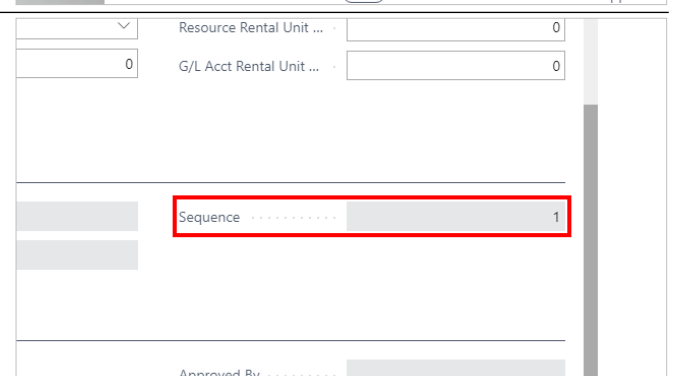
Note on the Transfer Details tab that the Original Document has the Rental Contract No. that the new contract was created from as the transfer was the first transfer from that contract.

The Previous Document has Rental Contract No. that the new contract was created from during the transfer.



Click on **Sequence 1**

As this was the first transfer from the original contract the Sequence is set to 1.



As all rental lines were transferred from the original contract and had been invoiced up to the dates specified in the Old Contract Stop Billing Date and Old Contract Return Date fields, then when the return of the units was processed during the transfer the original Rental Contract was flagged as completed.

Therefore the Rental Contract, RC00030, is now located in the Completed Rental Contract list.

4.9.3.3. Transferring a Contract which has an Alternative Shipping Address

This example demonstrates the transferring of rental lines from one contract to a new contract, which will be for a different Sell-to Customer.

The contract which was created when transferring rental lines to the same customer with continuous billing enabled, will be used for transferring lines to a different customer. When the transfer was done that created this contract, the Ship-to was changed to Alternative Shipping Address and a Ship-to Code was selected on the Transfer Worksheet.

Contract Information:

- The rental term on the contract lines is a monthly rental with periodic end prorated invoicing.
- The Rental Lines consist of a Rental Unit and rental group of 2, with a Rental Start Date of May 25 and a Return Date of July 31.
- An invoice has been posted on June 24 for the rental period of May 25 to June 24.
- The transfer will occur on June 24 and all rental lines will be transferred.

Transfer Worksheet Information:

The following settings will be used on the Transfer Worksheet.

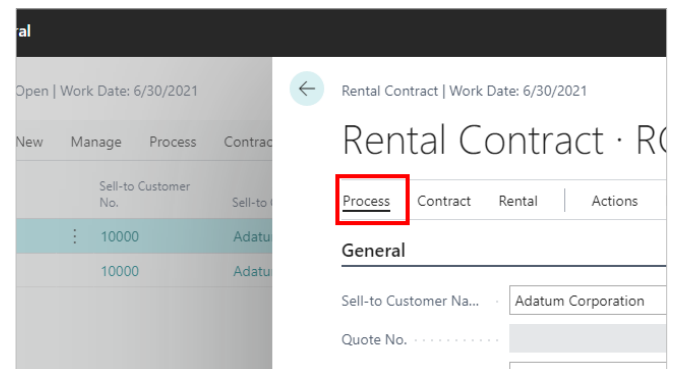
- The Ship-to will be changed to Custom Address, and then to Default (Sell-to Address) as noted in the
- The Copy Header will be disabled so that a different Sell-to Customer can be selected.
- The Customer No. will be changed from 10000 to 20000.
- The Recalculate Lines will be automatically enabled as the new contract is for a different customer. This is to ensure that the Tax Group and Rental Prices reflect the settings for the new customer.
- Transfer All will be enabled.
- Continuous Billing will be disabled as the new contract is not to commence until June 26.
- The Old Contract Stop Billing Date and Return Date will be June 24.
- The New Contract Start Billing Date will be June 26.
- The New Contract Return Date will be August 25.

IMPORTANT:

When a contract, with the Ship-to option set to Alternative Shipping Address, is to be transferred to another contract for a different customer, there are specific work around steps that must be followed on the Transfer Worksheet.

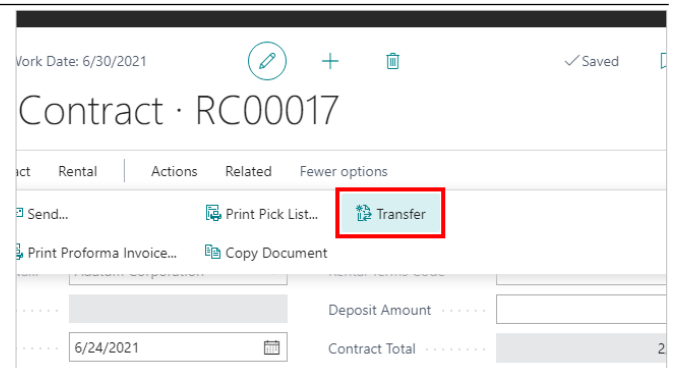
- First, set the Ship-to option to Custom Address
- Then disable the Copy Header and select the new customer No that the new contract is to be created for. The Ship-to option will automatically be set to Default (Sell-to Address) when the new Customer No. is selected.

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract' interface. On the left, there is a table with columns 'New', 'Manage', 'Process', and 'Contract'. The 'Process' button is highlighted with a red box. On the right, there is a form titled 'Rental Contract · RC00017'. The 'Process' button is also highlighted with a red box. Below the 'Process' button, there are tabs for 'General', 'Contract', 'Rental', and 'Actions'. The 'General' tab is selected, showing fields for 'Sell-to Customer No.' (Adatum Corporation) and 'Quote No.'.

Click on the navigation menu item **Transfer**



The screenshot shows the 'Contract' interface for 'Contract · RC00017'. At the top, there are icons for 'Edit', 'Add', and 'Delete', and a 'Saved' status. Below the title, there are tabs for 'Contract', 'Rental', 'Actions', 'Related', and 'Fewer options'. The 'Actions' tab is selected, showing a list of actions: 'Send...', 'Print Pick List...', 'Transfer' (highlighted with a red box), 'Print Proforma Invoice...', and 'Copy Document'. Below the actions, there are fields for 'Deposit Amount' and 'Contract Total'.



ODT Rentals Online Help

Click on the field **Ship-to**

RU00008-001	18 G Brad Nailer	MONTH-PEND...	1
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1

Shipping and Billing

Ship-toAlternate Shipping AddressBill-to

CodePARK ROAD

NameAdatum Corporation

Address10 Park Road

Address 2

Click on the item **Custom Address** in the list

RU00008-001	18 G Brad Nailer	MONTH-PEND...	1
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1

Shipping and Billing

Ship-toAlternate Shipping AddressBill-to

CodeDefault (Sell-to Address)
Alternate Shipping Address
Custom Address

NameAdatum CorporationCustom Address

Address10 Park Road

Address 2

CityAtlanta

Click on the field **Ship-to**

RU00008-001	18 G Brad Nailer	MONTH-PEND...	1
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1

Shipping and Billing

Ship-toCustom AddressBill-to

Code

NameAdatum Corporation

Address192 Market Square

Address 2

Click on the item **Default (Sell-to Address)** in the list

RU00008-001	18 G Brad Nailer	MONTH-PEND...	1
RU00008-002	18 G Brad Nailer	MONTH-PEND...	1

Shipping and Billing

Ship-toCustom AddressBill-to

CodeDefault (Sell-to Address)
Alternate Shipping Address
Custom Address

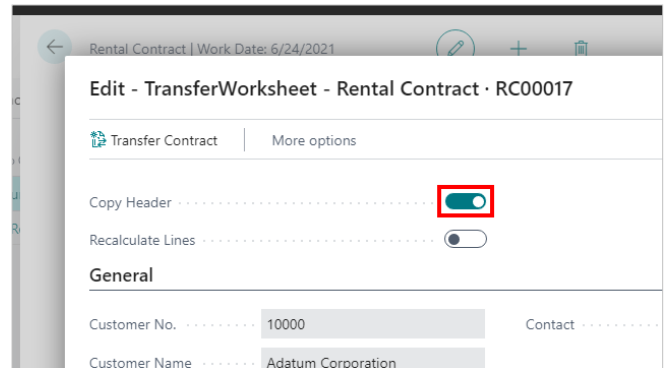
NameAdatum Corporation

Address192 Market Square

Address 2

City

Click on the toggle field **Copy Header**



Transfer Contract | More options

Copy Header ☒

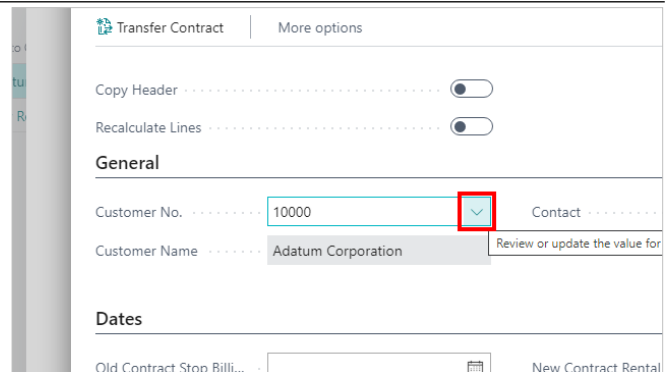
Recalculate Lines ☐

General

Customer No. 10000 Contact

Customer Name Adatum Corporation

Click on the lookup button **Customer No.**



Transfer Contract | More options

Copy Header ☐

Recalculate Lines ☐

General

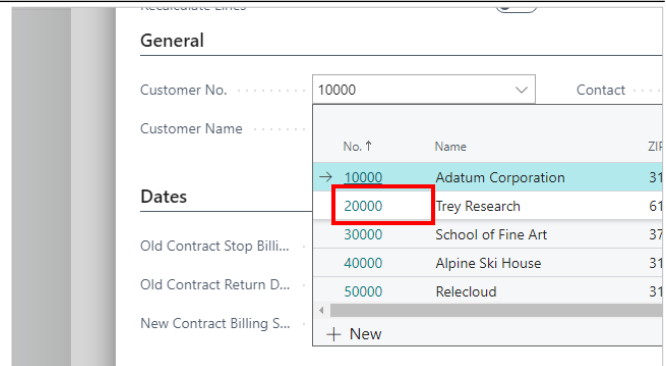
Customer No. 10000 Contact

Customer Name Adatum Corporation Review or update the value for

Dates

Old Contract Stop Billi... New Contract Rental

Click on the link in cell **No.** with the value **20000**



General

Customer No. 10000 Contact

Customer Name

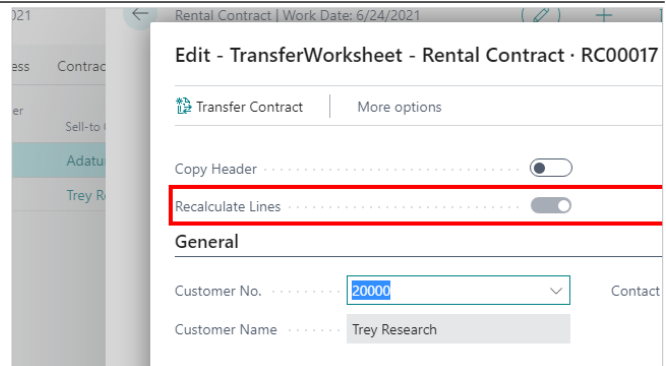
No. ↑	Name	ZIP
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		

Dates

Old Contract Stop Billi... New Contract Rental

Click on **Recalculate Lines**

When a different Customer No. is selected the Recalculate Lines is automatically enabled and cannot be disabled. This is to ensure that the pricing and tax related to the new customer are applied to the rental unit lines.



Transfer Contract | More options

Copy Header ☐

Recalculate Lines ☒

General

Customer No. 20000 Contact

Customer Name Trey Research

The selection of the dates will be as noted in the Transfer Worksheet Information.




ODT Rentals Online Help


Click on the link **Open the date picker for Old Contract Stop Billing Date**


Customer No. 20000 Contact

Customer Name Trey Research

Dates

Old Contract Stop Billi... ..  New Contract Rental


Old Contract Return D... ..  Transfer All


New Contract Billing S... ..  Continuous Billing


Transfer Rental Line

Click on a date in the calendar

Dates

Old Contract Stop Billi... ..  New Contract Rental

Old Contract Return D... ..  Transfer All

New Contract Billing S... ..  Continuous Billing

Transfer Rental Line

Rental Unit No. Description Code Rental Quantity Transfer Rental Start Date

→ PG-001 : Portable Generat... MONTH-PEND... 2 ☐ 5/25/2021 12


RU00008 18 G Brad Nail... MONTH-PEND... 2 ☐ 5/25/2021 12


RU00008-001 18 G Brad Nailer MONTH-PEND... 1 ☐ 5/25/2021 12


Click on the link **Open the date picker for Old Contract Return Date**

Customer Name Trey Research

Dates

Old Contract Stop Billi... .. 6/24/2021  New Contract Rental


Old Contract Return D... ..  Transfer All


New Contract Billing S... ..  Open the date picker for Old C...


Transfer Rental Line

Rental Unit No. Description Rental Terms Code Rental Quantity Transfer Rental Start Date

Click on a date in the calendar

Old Contract Stop Billi... .. 6/24/2021  New Contract Rental

Old Contract Return D... ..  Transfer All

New Contract Billing S... ..  Continuous Billing

Transfer Rental Line

Rental Unit No. Description Rental Terms Code Rental Quantity Transfer Rental Start Date

→ PG-001 : P... 2 ☐ 5/25/2021 12

RU00008 18 G Brad Nail... MONTH-PEND... 2 ☐ 5/25/2021 12

RU00008-001 18 G Brad Nailer MONTH-PEND... 1 ☐ 5/25/2021 12

RU00008-002 18 G Brad Nailer MONTH-PEND... 1 ☐ 5/25/2021 12



ODT Rentals Online Help

Click on the link **Open the date picker for New Contract Billing Start Date**

Customer Name Trey Research

Dates

Old Contract Stop Billi... 6/24/2021 New Contract Rental...

Old Contract Return D... 6/24/2021 Transfer All

New Contract Billing S... Continuous Billing ..

Transfer Rental Line

Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Transfer	Ren
-----------------	-------------	-------------------	-----------------	----------	-----

Click on a date in the calendar

Contract Return D... 6/24/2021 Transfer All ☒

Contract Billing S... Continuous Billing ☒

Transfer Rental Line

Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time
001			2	<input type="checkbox"/>	5/25/2021 12:00 AM
J00008			2	<input type="checkbox"/>	5/25/2021 12:00 AM
J00008-001	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	5/25/2021 12:00 AM
J00008-002	18 G Brad Nailer	MONTH-PEND...	1	<input type="checkbox"/>	5/25/2021 12:00 AM

Click on the link **Open the date picker for New Contract Rental Return Date**

Contact Helen Ray

New Contract Rental ...

Transfer All ☒

Continuous Billing ☒

Click on a date in the calendar

New Contract Rental ...

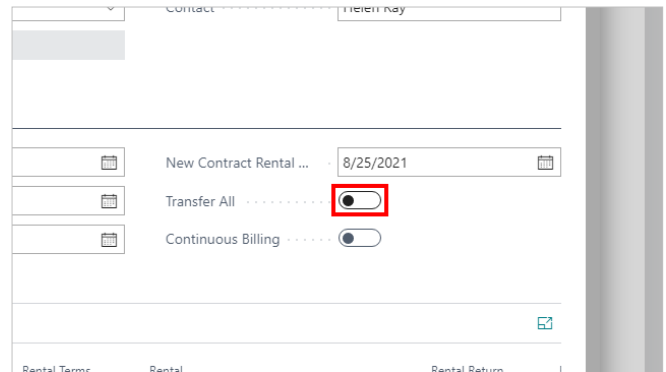
Transfer All ☒

Continuous Billing ☒

Transfer Rental Line

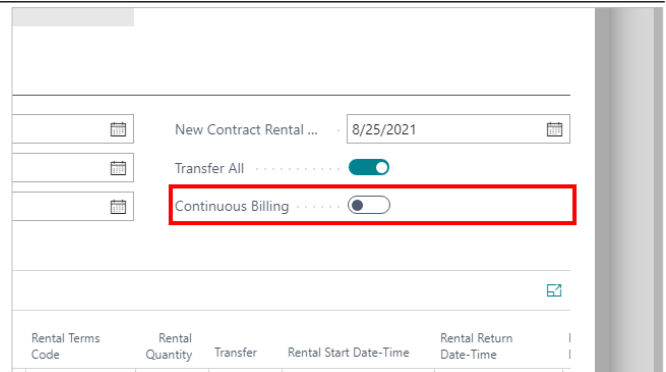
Rental Unit No.	Description	Rental Terms Code	Rental Quantity	Transfer	Rental Start Date-Time	Date-Time
...			2	<input type="checkbox"/>	5/25/2021 12:00 AM	7/31/2021 11:59 ...
...			2	<input type="checkbox"/>	5/25/2021 12:00 AM	7/31/2021 11:59 ...
...			1	<input type="checkbox"/>	5/25/2021 12:00 AM	7/31/2021 11:59 ...

Click on the toggle field **Transfer All**

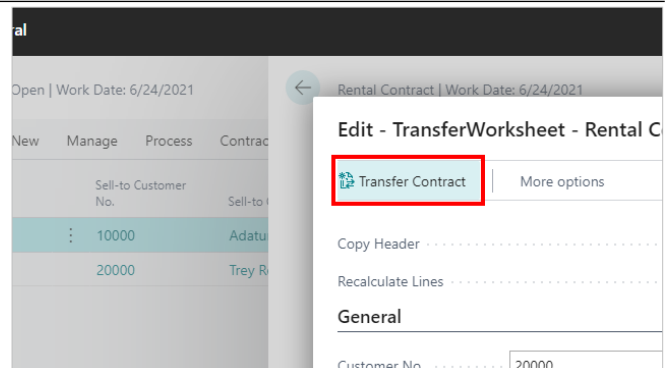


Click on **Continuous Billing**

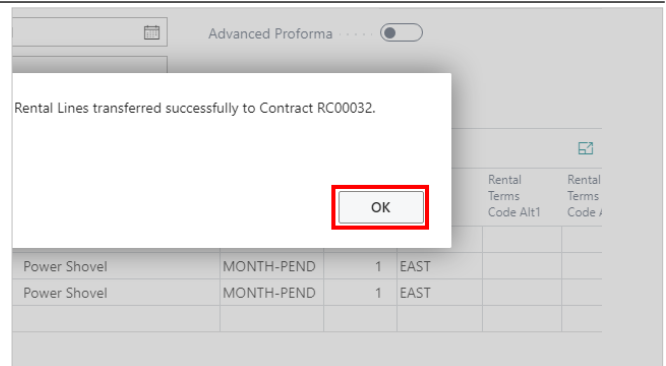
The Continuous Billing field is automatically disabled when the New Contract Start Billing Date is later than the day after the Old Contract Stop Billing Date.



Click on the navigation menu item **Transfer Contract**



Click on the button **OK**



To review the new Rental Contract, see the steps provided in the previous chapter on transferring to a new contract with a different Sell-to Customer.

4.10.Processing Rentals Across Time Zones

4.10.1. Rental Time Zones Overview

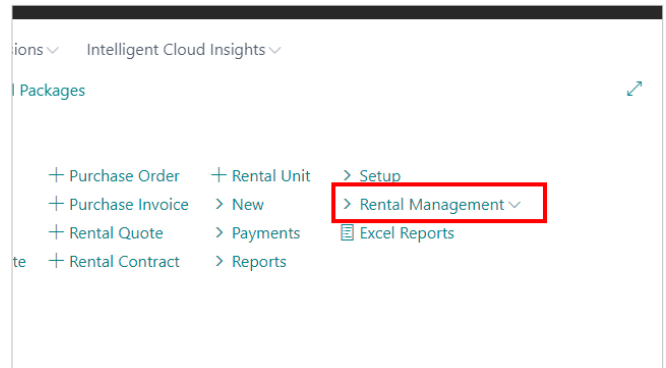
Some organizations have locations in different time zones. They may be entering the Rental Quote or Rental Contract in one time zone, shipping in another time zone and invoicing the rentals from another time zone. And possibly even processing the return in a time zone other than the time zone from which the rental occurred.

ODT Rentals provides the functionality to meet this need.

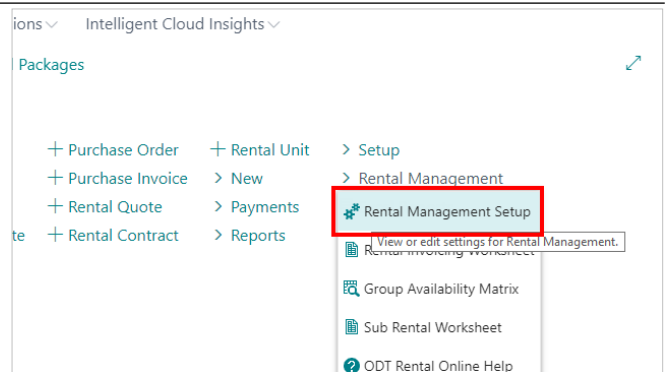
The Rental Time Zones are available from Rental Management Setup, Actions –Setup menu options.

The ODT Time Zones list will display the Time Zones, based on whether the Dynamics 365 Business Central is the North America or Rest of World version.

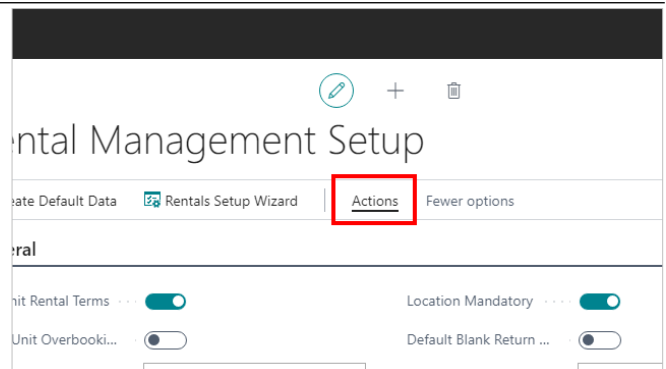
Click on the navigation menu item popup **Rental Management**



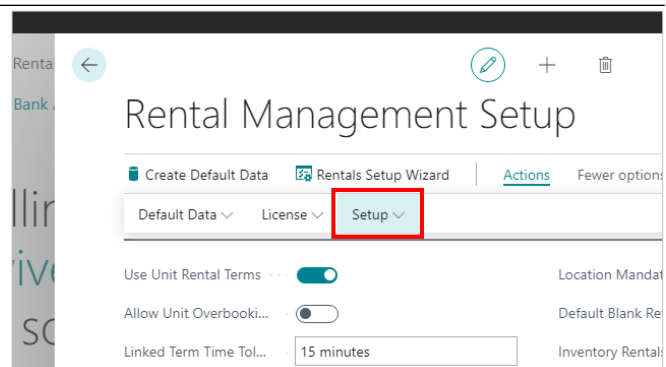
Click on the navigation menu item **Rental Management Setup**



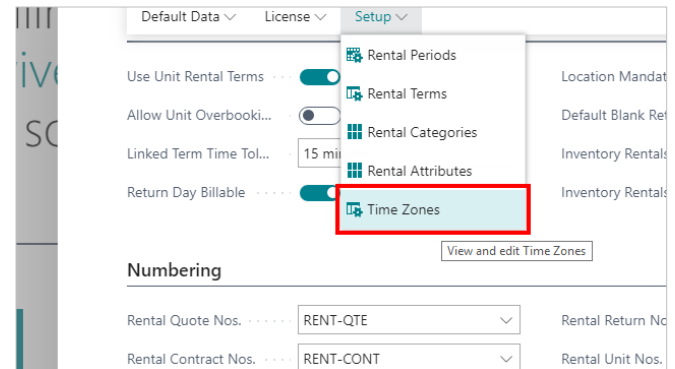
Click on the navigation menu item popup **Actions**



Click on the navigation menu item popup **Setup**



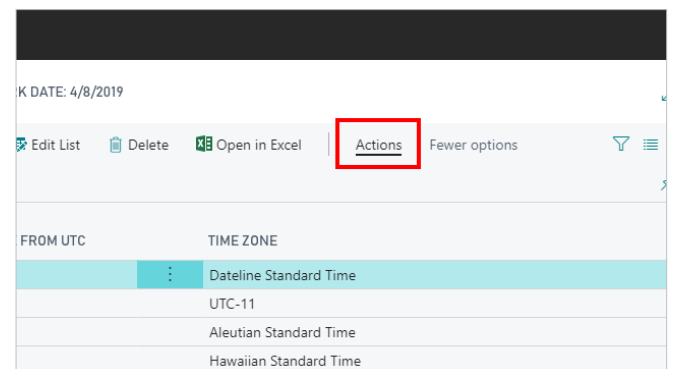
Click on the link **Time Zones**



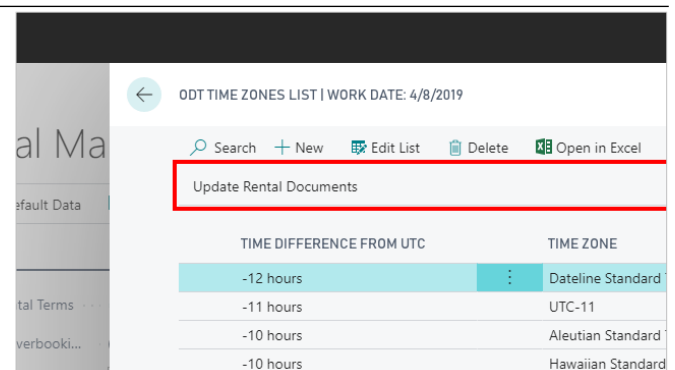
When the ODT Rentals App. is installed when an organization currently is using the Rentals App, a function is provided, which when ran will update the Original Time Zone field to the time zone in which the user running it resides.

Optionally, each of the current Rental Quotes and Rental Contracts can be opened by a user, who is in the time zone in which the document was created. This will update the Original Time Zone to the Time Zone in which that user resides.

Click on the navigation menu item popup **Actions**



Click on **Update Rental Documents**



Visibility of the time zones is provided on the Rental Quote and Rental Contract showing the time zone the entry originated in, the time zone the current user is located at, and the time difference between originating and current users' time zone, if different.

The fields on the Rental Quote and Rental Contract Order, General tab include:

- Original Time Zone
- Current Time Zone
- Time Zone Difference

The Current Time Zone and Time Zone Difference fields will dynamically change, when the quote or contract is opened in a different time zone.

The following Rental Line fields on a Rental Quote or Rental Contract will as well dynamically change, when opened in a time zone that is different from where it was created.



- Rental Start Date
- Rental Start Time
- Rental Return Date
- Rental Return Time
- Shipment Date
- Shipment Time
- Shipment Date-Time

NOTE:

The Required Shipping Date currently does not dynamically change, when the quote or contract is opened by a user who is in a different time zone from where the document was created.

Some of these fields are additional fields, which are available for adding to the Rental Lines. These can be added using the Personalize feature. These include the Rental Start Time, Rental Return Time, Shipment Date, Shipment Time and Shipment Date-Time.

- Shipment Date defaults from the Shipping tab, however can be overridden.
- When the Rental Term on the Rental Line has the setting of Tracking Date and Time, then the Rental Start Time, Rental Return Time and Shipment Time fields are automatically set to the current time zone system time. These fields can be overridden, when the term is set to Tracking Date and Time.
- When the Rental Term on the line has the setting of Tracking Date Only, then the Rental Start Time and Shipment Time are set to 12:00:00 AM and the Rental Return Time is set to 11:59:59 PM. These fields cannot be edited when the term is set for Tracking Date Only
- Shipment Date-Time is informational only, and is the combination of the Shipment Date and Shipment Time fields. This field cannot be directly edited.

The To Ship and To Return lists, from the Cues on the Business Manager and Sales Order Processor Profiles, display fields from the Rental Lines. Therefore the date and time fields will as well be dynamically changed, when opened in a different time zone.

When processing occurs in a different time zone than entered, the Rental Amount Line fields, Starting Date-Time and Ending Date-Time will dynamically change based on the time zone the user is located. The Billing Date field will dynamically change when the related Rental Term has the setting of Tracking Date and Time. The Billing Date will not change when the related Rental Term has the setting of Tracking Date Only.

The Rental Ledger Entries, Transaction Date-Time field, dynamically changes based on the zone the user is located in.

4.10.2. How to Process Contracts Across Time Zones

4.10.2.1. How to Add Available Fields to Rental Lines

Sales Order Processor Profile

The same steps apply to a user having the Business Manager Profile.

The following demonstrates the adding of the additional fields in order to provide a clear explanation of the impact on processing various steps in different time zones.

ODT Rentals Online Help

Click on the navigation menu item **Rental Contract**

[Rental Terms](#) [Rental Units](#) [Rental Packages](#)

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit	> Settings
+ Sales Order	+ Purchase Invoice	> New	> Rental Unit
+ Sales Invoice	+ Rental Quote	> Payments	> Export
+ Purchase Quote	+ <u>Rental Contract</u>	> Reports	

Create a new rental contract for rental product and

Click on the field **Sell-to Customer Name**

Contract

Rental | Actions | Navigate | Fewer options

.....	<input type="text"/>	Order
.....	<input type="text"/>	Doc
.....	<input type="text"/>	Ext
.....	<input type="text"/>	Ren
.....	<input type="text"/>	Sal

Click on the link in cell **No.** with the value **10000**

ProcessContractRentalActionsNavigateFewer options

General

Bill-to Customer Name

LL-TO

Bill-to Address

Bill-to Address 2

Bill-to City

Bill-to State

Bill-to ZIP Code

NO. ↑	NAME	ZIP
10000	Adatum Corporation	31000
20000	School of Fine Art	37000
40000	Alpine Ski House	31000
50000	Relecloud	31000

+ New

Click on the button **Show more**

[illegible]



ODT Rentals Online Help

Click on the field **Original Time Zone**

Note that both the Original Time Zone and Current Time Zone are the same and that there is no Time Zone Difference.

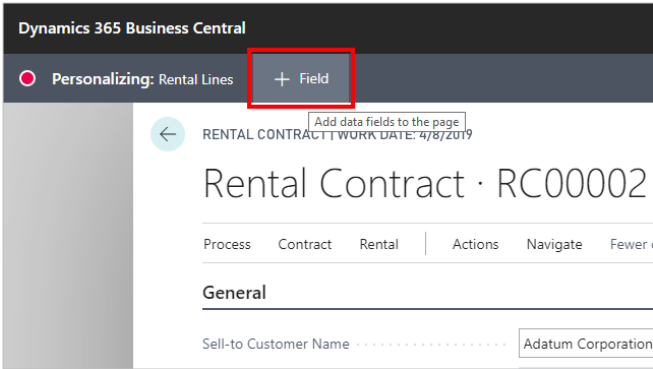
Click on the link **Settings**

Click on the menu item **Personalize**

Click on the link **More**

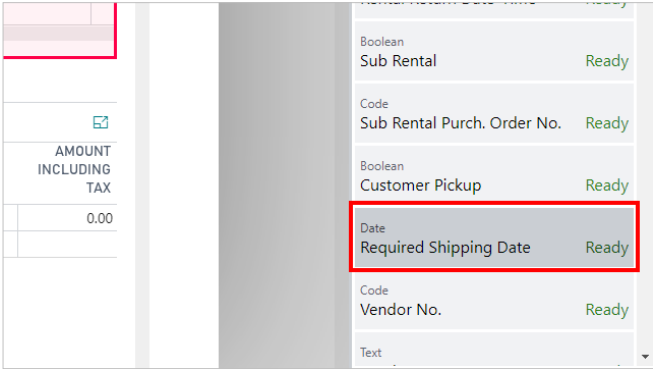


Click on the link **Field**



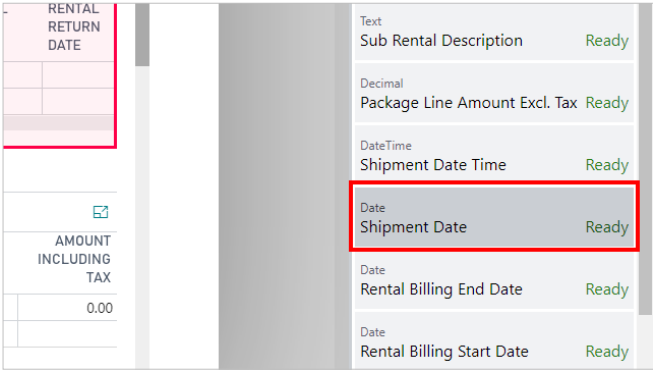
Click on the data brick **Caption = Required Shipping Date**

Drag and drop the field to the desired location on the Rental Line.



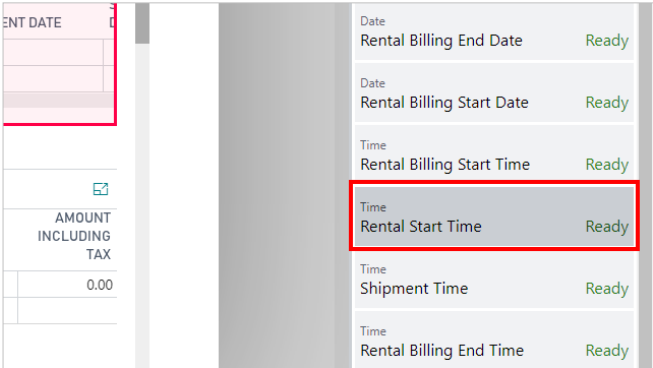
Click on the data brick **Caption = Shipment Date**

Drag and drop the field to the desired location on the Rental Line.



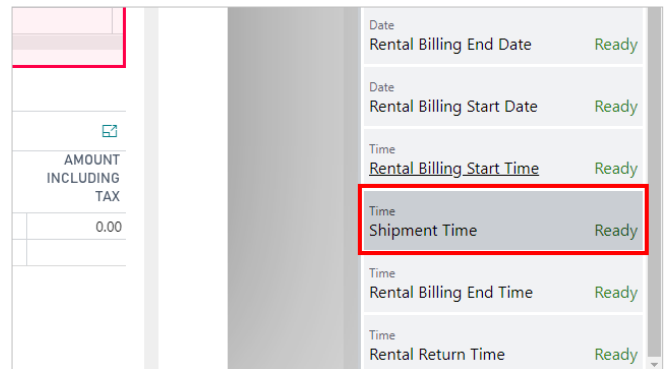
Click on the data brick **Caption = Rental Start Time**

Drag and drop the field to the desired location on the Rental Line.



Click on the data brick **Caption = Shipment Time**

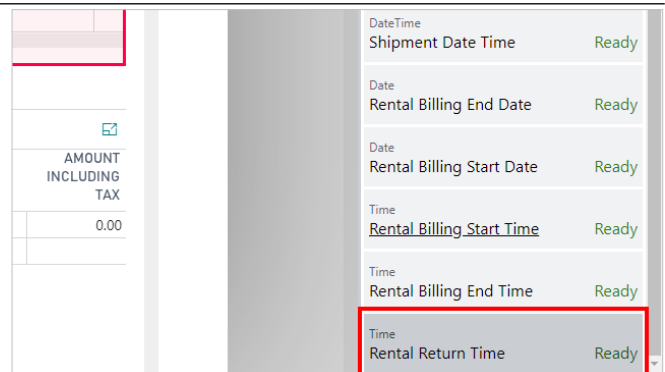
Drag and drop the field to the desired location on the Rental Line.



The screenshot shows a 'Rental Line' table with columns for 'AMOUNT INCLUDING TAX' and '0.00'. To the right, a list of available fields is shown, including 'Date Rental Billing End Date', 'Date Rental Billing Start Date', 'Time Rental Billing Start Time', 'Time Shipment Time', 'Time Rental Billing End Time', and 'Time Rental Return Time'. The 'Time Shipment Time' field is highlighted with a red border, indicating it is the selected field to be added to the Rental Line.

Click on the data brick **Caption = Rental Return Time**

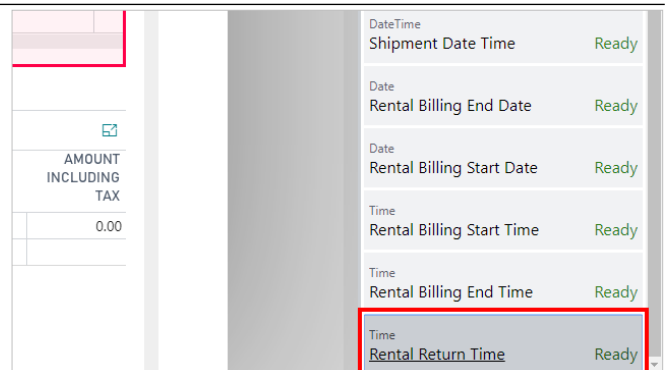
Drag and drop the field to the desired location on the Rental Line.



The screenshot shows the same 'Rental Line' table. The list of available fields on the right now includes 'DateTime Shipment Date Time', 'Date Rental Billing End Date', 'Date Rental Billing Start Date', 'Time Rental Billing Start Time', 'Time Rental Billing End Time', and 'Time Rental Return Time'. The 'Time Rental Return Time' field is highlighted with a red border, indicating it is the selected field to be added to the Rental Line.

Click on the data brick **Caption = Rental Return Time**

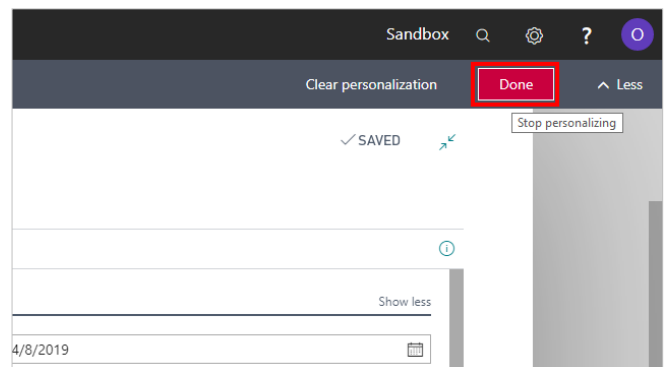
Drag and drop the field to the desired location on the Rental Line.



The screenshot shows the same 'Rental Line' table. The list of available fields on the right now includes 'DateTime Shipment Date Time', 'Date Rental Billing End Date', 'Date Rental Billing Start Date', 'Time Rental Billing Start Time', 'Time Rental Billing End Time', and 'Time Rental Return Time'. The 'Time Rental Return Time' field is highlighted with a red border, indicating it is the selected field to be added to the Rental Line.

The size of the fields can be modified to the desired size.

Click on the link **Done**



The screenshot shows the 'Done' button in the top right corner of the interface, highlighted with a red border. The button is labeled 'Done' and is located next to a 'Clear personalization' button and a 'Less' button. Below the buttons, there is a 'Show less' link and a date field showing '4/8/2019'.

4.10.2.2. Processing Across Time Zones when Tracking Date Only

The following demonstrates the entry and processing of a contract across time zones, where the Rental Term entered has the setting of Tracking Date Only.

For this demonstration the following time zones will be used in the entry and processing of a Rental Contract.

- Entry of the Rental Contract in Mountain Standard Time
- Shipped from Eastern Standard Time Zone from a location near the customer



ODT Rentals Online Help

- Invoiced from Central Standard Time Zone
- Returned in the Eastern Standard Time Zone

Click on the cell **Rental Unit No.**

Rental Lines

Manage

Line

Functions

Fewer options

New Line

Delete Line

Expand All

Collapse All

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE

Sales Lines

Manage

Line

Fewer options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines

Manage

Line

Functions

Fewer options

New Line

Delete Line

Expand All

Collapse All

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE

Look up value

Sales Lines

Manage

Line

Fewer options

Click on the cell **Rental Unit No.**

Rental Lines

Manage

Line

Functions

Fewer options

New Line

Delete Line

Expand All

Collapse All

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE

Sales Lines

Manage

Line

Fewer options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines

Manage

Line

Functions

Fewer options

New Line

Delete Line

Expand All

Collapse All

RENTAL UNIT NO.	DESCRIPTION	RENTAL TERMS CODE

Look up value

Sales Lines

Manage

Line

Fewer options



Click on the link in cell **No.** with the value **RU00001**

NO. ↑	DESCRIPTION	GR
PG-001	Portable Generators	
RP00001	Mini Excavator with Vibrator Plate	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Quantity** with the value **0**

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-END	0		

Enter the text **1**.

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-END	1		

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
RU00001	MONTH-END	1	
	MONTH-END	1	



Click on the lookup button in the cell **Rental Unit No.**

Rental Lines					Line	Functions	Fewer options	
					New Line	Delete Line	Expand All	Collapse All
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE					
RU00001	MONTH-END	1						
	MONTH-END	1						
Sales Lines					Manage	Line	Fewer options	

Click on the link in cell **No.** with the value **RU00002**

RENTAL UNIT LIST			
NO. ↑	DESCRIPTION		
BD-000	Buckeye Ditcher		
RU00002	Buckeye Ditcher		
Look up value	Buckeye Ditcher		
RU00004	Buckeye Ditcher		
RU00005	Buckeye Ditcher		
RU00006	Buckeye Ditcher		
SUB BUCKEYE	Sub Buckeye Ditcher		

Note that the Required Shipping Date, Shipment Date and Rental Start Date are all the same date.

The Rental Start Date is automatically set to the Document Date and the Required Shipping Date defaults from the Rental Start Date. The Shipment Date defaults from the Shipment Date on the Shipping tab, which defaults from the Document Date.






Also note that the Shipment Time and Rental Start Time are the same time.

The date fields can be overridden when the Rental Term has the setting of Tracking Date Only. The time fields cannot be overridden.

The following demonstrates the reviewing of the Rental Amount Lines for the unit.

Click on the navigation menu item popup **Line**

Quote No.		
Posting Date		4/8/2019
Order Date		4/8/2019
Document Date		4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
 New Line	 Delete Line	 Expand All	 Collapse All	 Group Lines

RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
RU00001	MONTH-END	1		
RU00002	MONTH-END	1	EAST	



ODT Rentals Online Help

Click on the navigation menu item **Rental Amount Lines**

Posting Date 4/9/2019

Order Date 4/8/2019

Document Date 4/8/2019

Rental Lines Manage Line Functions Fewer options

Rental Amount Lines Rental Ledger Entries Rental Va

View the rental amount line records that will be billed for the sel

RENTAL UNIT NO.	TERMS CODE	QUANTITY	LOCATION CODE
RU00001	MONTH-END	1	
RU00002	MONTH-END	1	EAST

Click on the cell **Starting Date-Time** with the value **4/8/2019 12:00 AM**

Search Open in Excel

VIEW - RENTAL LINE RENTAL AMOUNTS

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 12:00 AM	5/7/2019 11:59 PM
Damage Waiver	4/8/2019 12:00 AM	5/7/2019 11:59 PM

Click on the cell **Ending Date-Time** with the value **5/7/2019 11:59 PM**

Search Open in Excel

VIEW - RENTAL LINE RENTAL AMOUNTS

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	4/8/2019 12:00 AM	5/7/2019 11:59 PM	1
Damage Waiver	4/8/2019 12:00 AM	5/7/2019 5/7/2019 11:59 PM	1

Click on the cell **Billing Date** with the value **5/7/2019**

Take notice of the Billing Date on the unit, for comparison purposes when opening the contract in a different time zone.

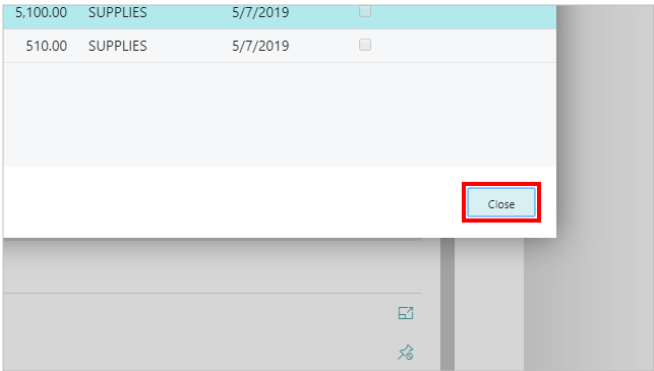
AMOUNT INCLUDING TAX TAX GROUP CODE **BILLING DATE** **BILLED** INVOICE NO.

5,100.00	SUPPLIES	5/7/2019		
510.00	SUPPLIES	5/7/2019		



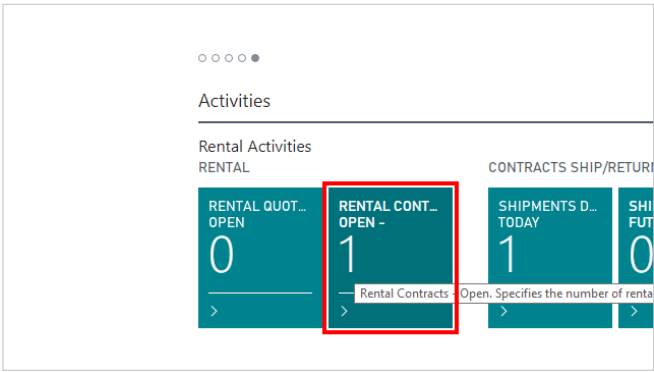
ODT Rentals Online Help

Click on the button **Close**

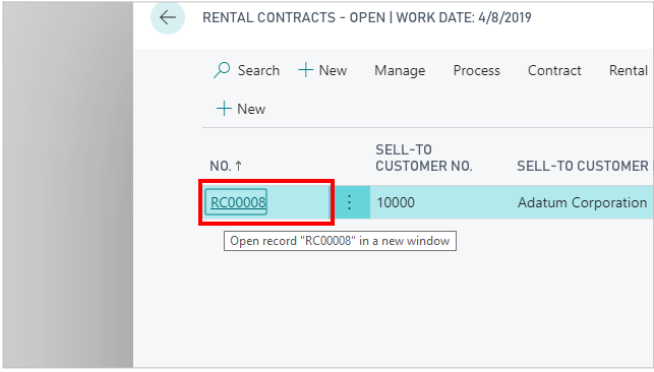


The following demonstrates the opening of the contract and the shipping of the contract from the Eastern Standard Time Zone.

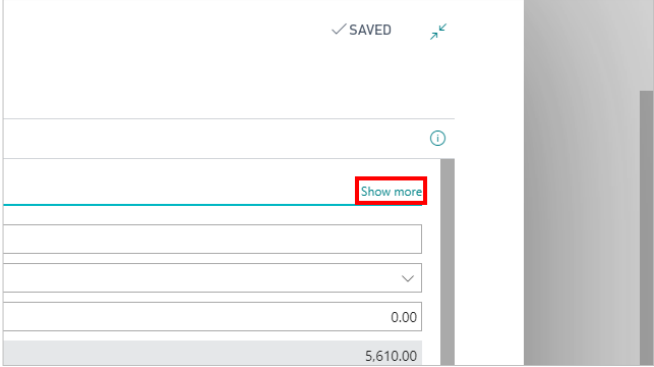
Click on the link **Rental Contracts - Open 1**



Click on the link in cell **No.** with the value **RC00008**



Click on the button **Show more**





ODT Rentals Online Help

Click on the field **Current Time Zone**

Note that the Current Time Zone displays Eastern Standard Time which is the zone the user opening the contract is located in.

Click on the field **Time Zone Difference**

Note that the Time Zone Difference field is displaying -2 hours.
This is as the Original Time Zone is 2 hours behind the Current Time Zone.

Click on the button **Show less**

Click on the cell **Rental Start Date** with the value **4/8/2019**



Click on the cell **Rental Start Time** with the value
2:00:00 AM

5,610.00					
ID	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
G	4/8/2019	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/2019
	4/8/2019	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/2019

Notice that the Rental Start Date remains the same even though the time change is 2 hours between Mountain Standard Time and Eastern Standard Time.

This is as the Rental Start Time was automatically updated from 12:00 AM to 2:00 AM on the same day.

Click on the cell **Rental Return Date** with the value
5/8/2019

ding Amount 5,610.00					
MENT	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
19	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/2019	1:59:59 AM
19	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/2019	1:59:59 AM

Click on the cell **Rental Return Time** with the value
1:59:59 AM

5,610.00					
MENT	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE
0 AM	4/8/2019	2:00:00 AM	5/8/2019	1:59:59 AM	5,000.00
0 AM	4/8/2019	2:00:00 AM	5/8/2019	1:59:59 AM	5,000.00

Notice that the Rental Return Date changed from the original zone date.

This is due to the Rental Return Time changing by 2 hours between Mountain Standard Time and Eastern Standard Time. The Rental Return Time was automatically updated from 11:59 PM to 1:59 AM of the following day.

The following provides a review of the fields on the Rental Amount Line fields and the impact of a user opening the contract in a different time zone.

Click on the cell **Rental Unit No.** with the value
RU00002

Rental Lines				Manage	Line	Functions	Fewer options
RENTAL UNIT NO.				RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	
RU00001				MONTH-END	1	EAST	
RU00002				MONTH-END	1	EAST	
				RU00002			
Sales Lines				Manage	Line	Fewer options	



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Posting Date		4/8/2019
Order Date		4/8/2019
Document Date		4/8/2019
Rental Lines		Manage Line Functions Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY LOCATION CODE RENTAL TERMS CODE A
RU00001	MONTH-END	1 EAST
RU00002	MONTH-END	1 EAST

Click on the navigation menu item **Rental Amount Lines**

Posting Date		4/8/2019
Order Date		4/8/2019
Document Date		4/8/2019
Rental Lines		Manage Line Functions Fewer options
Rental Amount Lines		Rental Ledger Entries Rental Va
RU00001		MONTH-END 1 EAST
RU00002		MONTH-END 1 EAST

Click on the cell **Starting Date-Time** with the value **4/8/2019 2:00 AM**

VIEW - RENTAL LINE RENTAL AMOUNTS		
TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 2:00 AM	5/8/2019 1:59 AM
Damage Waiver	4/8/2019 2:00	4/8/2019 2:00 AM /2019 1:59 AM

Click on the cell **Ending Date-Time** with the value **5/8/2019 1:59 AM**

VIEW - RENTAL LINE RENTAL AMOUNTS			
TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
ntal	4/8/2019 2:00 AM	5/8/2019 1:59 AM	1
mage Waiver	4/8/2019 2:00 AM	5/8/2019 1:59	5/8/2019 1:59 AM 1

Notice that the date and time fields are displaying the same date and times as on the Rental Line.

Click on the cell **Billing Date** with the value **5/7/2019**

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
5,100.00	SUPPLIES	5/7/2019		
510.00	SUPPLIES	5/7/2019		

When the rental term on the Rental Line has the setting of Tracking Date Only, then the Billing Date does not change when opening the contract in a different time zone.

When the rental term on the Rental Line has the setting of Tracking Date and Time, then the Billing Date may change. This is dependent on which time zone the user is located in, and the time difference from the original time zone.

Click on the button **Close**

5,100.00	SUPPLIES	5/7/2019	
510.00	SUPPLIES	5/7/2019	

Close

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000008

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals Return Rentals Bulk Returns Invoice

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC000008

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.



Click on the navigation menu item **Ship Rentals**

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00008

Process Contract Rental Actions Navigate Fewer

Ship Rentals Return Rentals Bulk Returns Invo

Post the shipment of the rental units on the rental lines. A posted deliv

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/8/2019

Click on the button **Yes**

Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

RENTAL START TIME	RENTAL RETURN DATE
2:00:00 AM	5/8/2019
2:00:00 AM	5/8/2019

Click on the button **OK**

Shipment Posted Successfully.

OK

RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
2:00:00 AM	5/8/2019	1:59
2:00:00 AM	5/8/2019	1:59

The following provides a review of the fields on the Rental Ledger Entries, Transaction Date-Time field.

Click on the navigation menu item popup **Line**

Quote No.

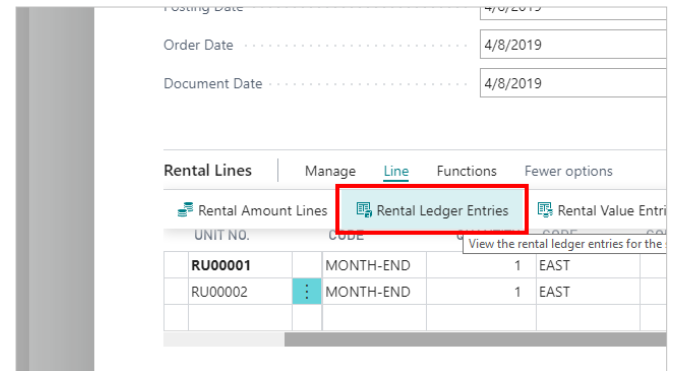
Posting Date 4/8/2019

Order Date 4/8/2019

Document Date 4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
RU00001	MONTH-END	1	EAST	
RU00002	MONTH-END	1	EAST	

Click on the navigation menu item **Rental Ledger Entries**

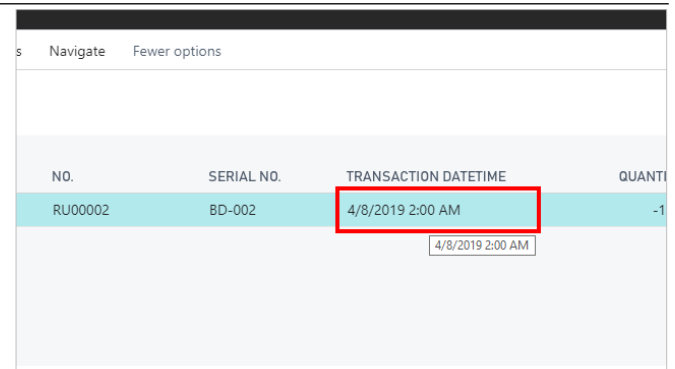


The screenshot shows the 'Rental Ledger Entries' option highlighted in the navigation menu. The menu includes 'Rental Amount Lines', 'Rental Ledger Entries', and 'Rental Value Entries'. Below the menu, a table displays rental ledger entries for unit RU00001 and RU00002, both with a transaction date of 4/8/2019.

UNIT NO.	CODE	TRANSACTION DATE	QUANTITY	UNIT PRICE	TOTAL
RU00001	MONTH-END	4/8/2019	1	EAST	
RU00002	MONTH-END	4/8/2019	1	EAST	

Click on the cell **Transaction DateTime** with the value **4/8/2019 2:00 AM**

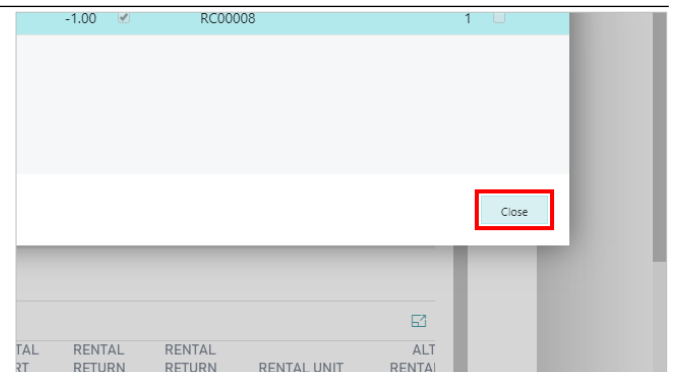
Notice that the Transaction Date Time is displaying the date and time the shipment occurred on based on the time zone of the current user.



The screenshot shows a table with columns: NO., SERIAL NO., TRANSACTION DATETIME, and QUANTITY. The row for RU00002 is highlighted, showing a transaction date of 4/8/2019 2:00 AM.

NO.	SERIAL NO.	TRANSACTION DATETIME	QUANTITY
RU00002	BD-002	4/8/2019 2:00 AM	-1

Click on the button **Close**

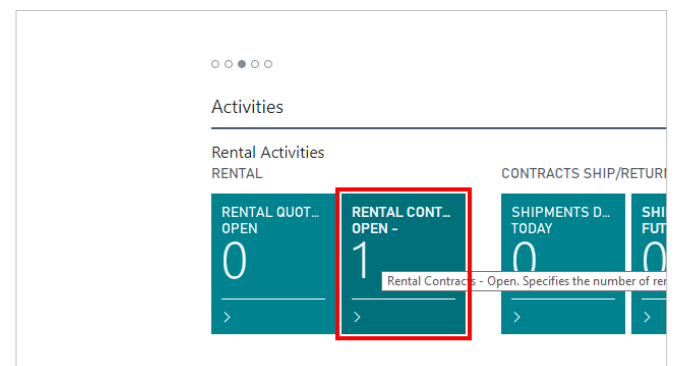


The screenshot shows a 'Close' button in the bottom right corner of a window. The window displays a table with columns: TAL, RENTAL RETURN, RENTAL RETURN, RENTAL UNIT, and ALT RENTAL.

TAL	RENTAL RETURN	RENTAL RETURN	RENTAL UNIT	ALT RENTAL

The following demonstrates the opening of the contract, and the invoicing of the contract from the Central Standard Time Zone.

Click on the link **Rental Contracts - Open 1**



The screenshot shows a dashboard with a 'Rental Contracts - Open 1' link highlighted. The dashboard includes a 'Rental Activities' section with a table showing the number of open contracts.

ACTIVITY	OPEN
RENTAL QUOT...	0
RENTAL CONT...	1



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RC00008**

RENTAL CONTRACTS - OPEN | WORK DATE: 4/8/2019

Search + New Manage Process Contract Rental

+ New

NO. ↑	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00008	10000	Adatum Corporation

Open record "RC00008" in a new window

Click on the button **Show more**

✓ SAVED

Show more

0.00

5,610.00

Click on the field **Current Time Zone**

Note that the Current Time Zone displays Central Standard Time which is the zone the user opening the contract is located in.

PS

0.00

5,610.00

5,610.00

Mountain Standard Time

Central Standard Time

-1 hour Central Standard Time

Click on the field **Time Zone Difference**

Note that the Time Zone Difference field is displaying -1 hours.
This is as the Original Time Zone is 1 hour behind the Current Time Zone.

0.00

5,610.00

5,610.00

Mountain Standard Time

Central Standard Time

-1 hour

-1 hour

TAX GROUP QTY. TO QTY. ON QTY. TO QTY. LINE RE... DAY



Click on the button **Show less**

Click on the cell **Rental Start Date** with the value **4/8/2019**

Click on the cell **Rental Start Time** with the value **1:00:00 AM**

Notice that the Rental Start Date remains the same even though the time change is 1 hour between Mountain Standard Time and Central Standard Time.

This is as the Rental Start Time was automatically updated from 12:00 AM to 1:00 AM on the same day.

Click on the cell **Rental Return Date** with the value **5/8/2019**



Click on the cell **Rental Return Time** with the value **12:59:59 AM**

4/8/2019						
Manage	Line	Functions	Fewer options			
	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
	4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM	5,000.00	0.00
	4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM	5,000.00	0.00

Notice that the Rental Return Date changed from the original zone date.

This is due to the Rental Return Time changing by 1 hour between Mountain Standard Time and Central Standard Time. The Rental Return Time was automatically updated from 11:59 PM to 12:59 AM of the following day.

Click on the cell **Rental Unit No.** with the value **RU00002**

Rental Lines					Manage	Line	Functions	Fewer options	
	RENTAL UNIT NO.		RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME			
	RU00001		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			
	RU00002		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			

Sales Lines				Manage	Line	Fewer options	
-------------	--	--	--	--------	------	---------------	--

Click on the navigation menu item popup **Line**

Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines					Manage	Line	Functions	Fewer options	
	RENTAL UNIT NO.		RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME			
	RU00001		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			
	RU00002		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			

Click on the navigation menu item **Rental Amount Lines**

Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines					Manage	Line	Functions	Fewer options	
	Rental Amount Lines								
	RENTAL UNIT NO.		RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME			
	RU00001		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			
	RU00002		4/8/2019	1:00:00 AM	5/8/2019	12:59:59 AM			



Click on the cell **Starting Date-Time** with the value **4/8/2019 1:00 AM**

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 1:00 AM	5/8/2019 12:59 AM
Damage Waiver	4/8/2019 1:00 AM	4/8/2019 12:59 AM

Click on the cell **Ending Date-Time** with the value **5/8/2019 12:59 AM**

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	4/8/2019 1:00 AM	5/8/2019 12:59 AM	1
Damage Waiver	4/8/2019 1:00 AM	5/8/2019 12:59 AM	1

Notice that the date and time fields are displaying the same date and times as on the Rental Line.

Click on the cell **Billing Date** with the value **5/7/2019**

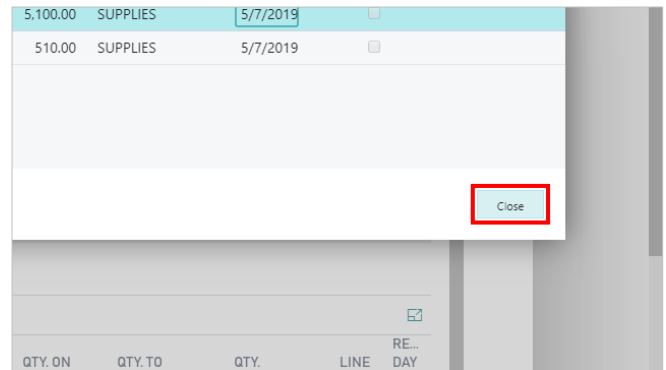
AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
5,100.00	SUPPLIES	5/7/2019		
510.00	SUPPLIES	5/7/2019		

When the rental term on the Rental Line has the setting of Tracking Date Only, then the Billing Date does not change when opening the contract in a different time zone.

When the rental term on the Rental Line has the setting of Tracking Date and Time, then the Billing Date may change. This is dependent on which time zone the user is located in, and the time difference from the original time zone.

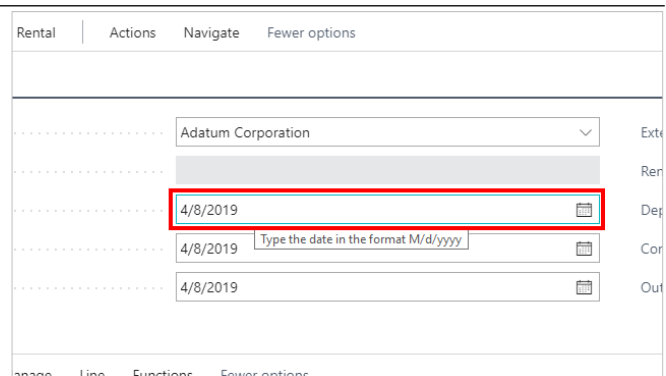
ODT Rentals Online Help

Click on the button **Close**



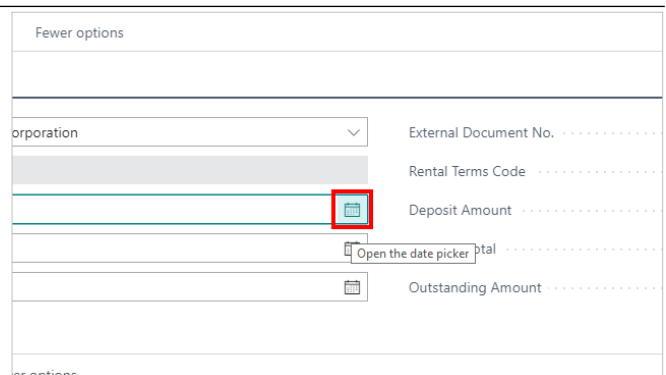
The screenshot shows a modal window with a table containing two rows of data: '5,100.00 SUPPLIES 5/7/2019' and '510.00 SUPPLIES 5/7/2019'. At the bottom right of the modal, there is a button labeled 'Close' which is highlighted with a red rectangular box.

Click on the field **Posting Date**



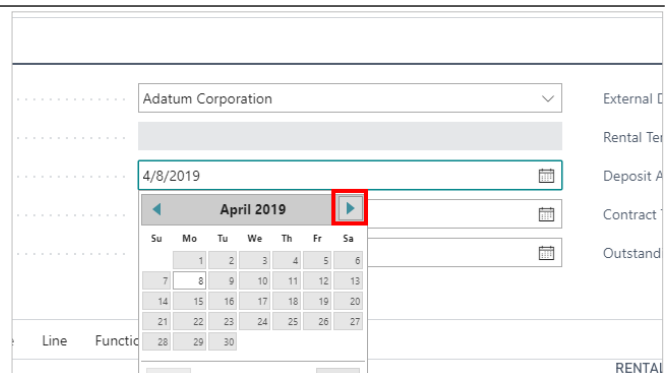
The screenshot shows a form with a dropdown menu set to 'Adatum Corporation'. Below it, there is a date field containing '4/8/2019' with a calendar icon to its right. This date field is highlighted with a red rectangular box. Below the date field, there is a text input field with the placeholder 'Type the date in the format M/d/yyyy' and another date field with the value '4/8/2019'.

Click on the link **Open the date picker**



The screenshot shows a form with a dropdown menu set to 'Adatum Corporation'. To the right of the dropdown, there are several fields: 'External Document No.', 'Rental Terms Code', 'Deposit Amount', and 'Outstanding Amount'. Below the 'Deposit Amount' field, there is a link labeled 'Open the date picker' with a calendar icon to its left. This calendar icon is highlighted with a red rectangular box.

Click on the link **Next**



The screenshot shows a form with a dropdown menu set to 'Adatum Corporation'. Below it, there is a date field containing '4/8/2019' with a calendar icon to its right. This date field is highlighted with a red rectangular box. Below the date field, there is a calendar for April 2019. The calendar has a red rectangular box around the date '8' (April 8th). The calendar shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates (1 through 30).

ODT Rentals Online Help

Click on a date in the calendar

Select a date that is equal to or later than the Billing Date in the Rental Amount Lines.

In this example, the Billing Date is the same as the original time zone as covered in the review of the Rental Amount Lines.

Customer Name		Adatum Corporation																																											
Date		4/8/2019																																											
Start Date		<div> <div> May 2019 </div> <table> <tr> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> </tr> <tr> <td></td> <td></td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> <tr> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td></td> </tr> </table> <div> Today Done </div> </div>		Su	Mo	Tu	We	Th	Fr	Sa				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Su	Mo	Tu	We	Th	Fr	Sa																																							
			1	2	3	4																																							
5	6	7	8	9	10	11																																							
12	13	14	15	16	17	18																																							
19	20	21	22	23	24	25																																							
26	27	28	29	30	31																																								
Lines	Manage	Line	Function																																										
TOTAL NO.	STANDARD TEXT CODE	DESCRIPTION	CODE																																										
1001	:	Buckeye Ditcher Group	MONTH-END																																										
			1																																										

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation






Quote No.

Click on the navigation menu item **Invoice**

CONTRACT | WORK DATE: 4/8/2019

Contract · RC00008

Contract Rental | Actions Navigate Fewer options

Rentals  Return Rentals  Bulk Returns  **Invoice**  Invoice and Print  Posted

Finalize the document by posting the amounts and q

Customer Name Adatum Corporation


.....

.....

.....

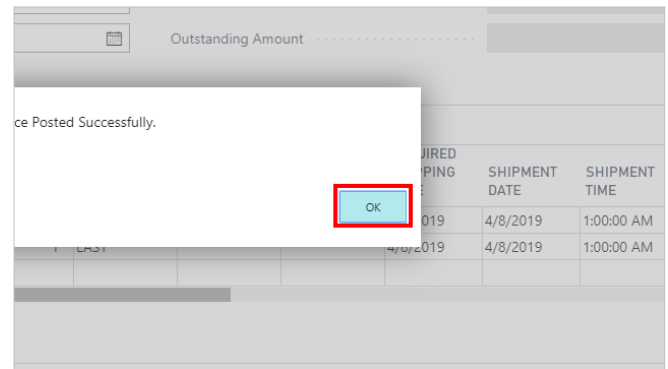
te 5/7/2019

Click on the button **Yes**



A confirmation dialog box is displayed in the center of the screen. It has a white background and a thin gray border. In the top-left corner, there is a blue circular icon containing a white question mark. To the right of this icon, the text "Are you sure you want to Invoice this rental contract?" is written in a black, sans-serif font. At the bottom of the dialog box, there are two rectangular buttons. The button on the left is light blue with a red border and contains the text "Yes". The button on the right is white with a blue border and contains the text "No".

Click on the button **OK**



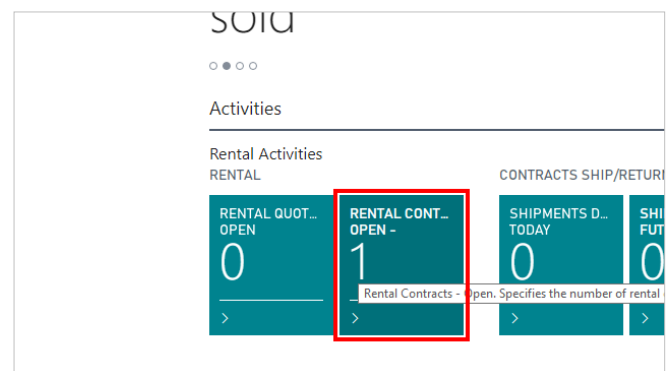
When the rental term on the rental lines has the setting of Tracking Date Only, then the Posted Rental Invoice will display the dates based on the time zone the user is located in.

The following demonstrates the opening of the contract, and the returning of the contract from the Eastern Standard Time Zone.

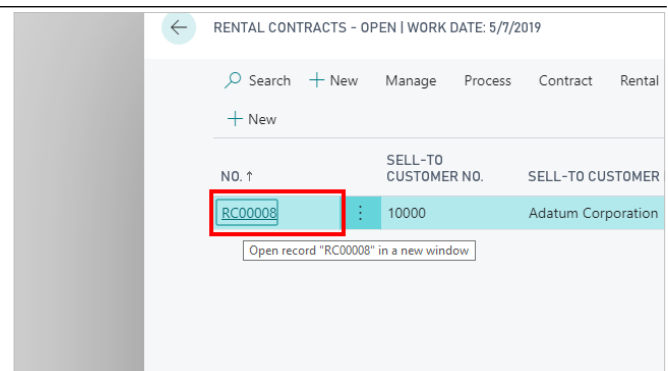
NOTE:

As the date and time fields have been covered in Eastern Standard Time, they will not be covered in this section.

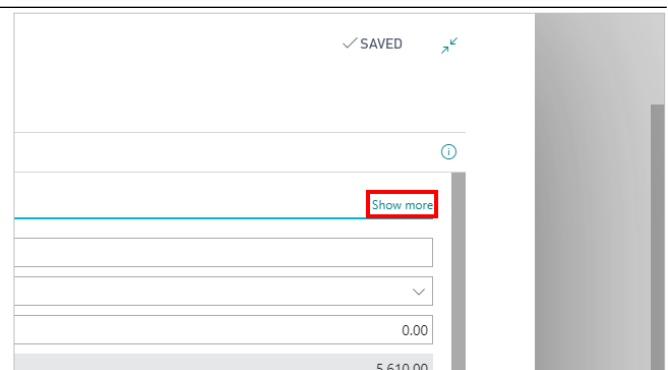
Click on the link **Rental Contracts - Open 1**



Click on the link in cell **No.** with the value **RC00008**



Click on the button **Show more**





ODT Rentals Online Help

Click on the field **Current Time Zone**

PS

0.00

5,610.00

5,610.00

Mountain Standard Time

Eastern Standard Time

-2 hours Eastern Standard Time

Click on the button **Show less**

✓ SAVED

Show less

4/8/2019

5/7/2019

Click on the cell **Rental Return Date** with the value **5/8/2019**

5,610.00				
SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
4/8/2019	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/2019
5/7/2019	2:00:00 AM	4/8/2019	2:00:00 AM	5/8/ Type the date in the format M/d/yyyy

Click on the field **Posting Date**

Rental Actions Navigate Fewer options

Adatum Corporation

5/7/2019

4/8/2019

5/7/2019



Click on the link **Open the date picker**

Fewer options

corporation

External Document No.

Rental Terms Code

Deposit Amount

Open the date picker

Outstanding Amount

er options

Click on a date in the calendar

er Name Adatum Corporation

5/7/2019

May 2019

Su Mo Tu We Th Fr Sa

1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31

Today Done

Manage Line Functions

STANDARD TEXT CODE	DESCRIPTION	CODE	RENTAL QUANTITY	LOCATI CODE
	Buckeye Ditcher Group	MONTH-END	1	EAST

Press the **Enter** key.

er Name Adatum Corporation

5/8/2019

4/8/2019

5/7/2019

Manage Line Functions Fewer options

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATI CODE
	Buckeye Ditcher Group	MONTH-END	1	EAST

Click on the button **No**

Outstanding Amount

have modified Posting Date and there are 1 or more lines
an earlier Return Date.
ou want to update the Return Date on all open and rented
l lines?

Yes No

SHIPPED DATE	SHIPMENT DATE	SHIPMENT TIME
019	4/8/2019	2:00:00 AM
019	4/8/2019	2:00:00 AM

IMPORTANT NOTE

When returning in a different time zone, this pop-up is occurring when the Posting Date entered is the same as displayed in the Rental Return Date on the line.

This is due to coding and will be addressed in the next release.

Therefore until the next release, when entering the same date, always select No on this pop-up message.



ODT Rentals Online Help

Click on the cell **Qty. to Return** with the value **0**

CURRENCY	TAX GROUP CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE. DAY BIL
	SUPPLIES	0	0	0	0	0	
	SUPPLIES	0	1	0	0	0	
				0			
UNIT OF							
LINE AMOUNT							

Enter the text **1**.

CURRENCY	TAX GROUP CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE. DAY BIL
	SUPPLIES	0	0	0	0	0	
	SUPPLIES	0	1	1	0	0	
UNIT OF							
LINE AMOUNT							

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Return Rentals**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00008

Process Contract **Rental** Actions Navigate Fewer options

Ship Rentals **Return Rentals** Bulk Returns Invoice

Post the return of the rental units on the rental line

Sell-to Customer Name Adatum Corporation

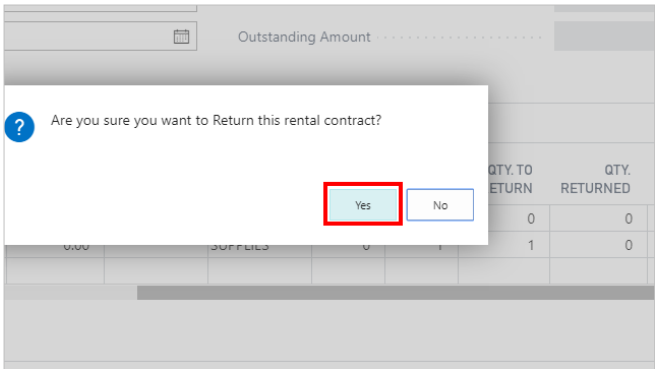
Quote No.

Posting Date 5/8/2019



Click on the button **Yes**

As the contract has been fully invoiced, the contract will close, when Yes is selected, and the return is posted.



4.10.2.3. Processing Across Time Zones when Tracking Date and Time

The following demonstrates the entry and processing of a contract across time zones, where the Rental Term entered has the setting of Tracking Date and Time.

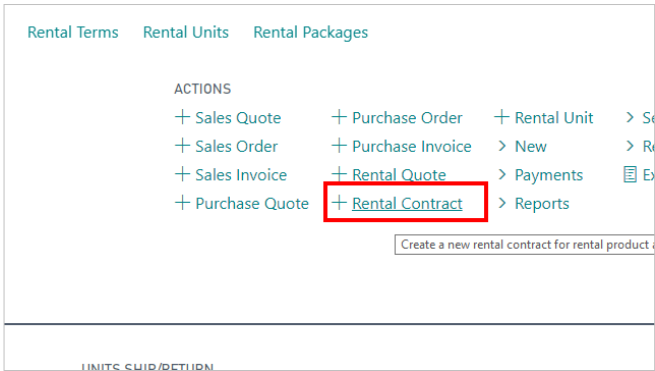
For this demonstration the following time zones will be used in the entry and processing of a Rental Contract in order to demonstrate the differences from a term with Tracking Date Only.

- Entry of the Rental Contract in Mountain Standard Time
- Shipped from Eastern Standard Time Zone from a location near the customer
- Invoiced from Central Standard Time Zone
- Returned in the Eastern Standard Time Zone

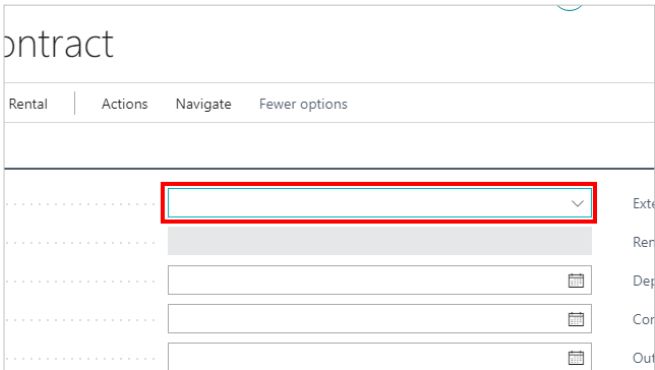
Setup for this demonstration included the creation of a Rental Term card with the following settings and the setup of a Rental Price card for the new term on a Rental Unit Group.

- Invoice Type: End
- Period Code: Month
- Invoicing Period Code: Month
- Rental Date Time Tracking: Track Date and Time

Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**





ODT Rentals Online Help

Click on the link in cell **No.** with the value **10000**

Process Contract Rental Actions Navigate Fewer options

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

NO. NAME ZII

10000 Adatum Corporation 31

20000 Select record "10000" Search 61

30000 School of Fine Art 37

40000 Alpine Ski House 31

50000 Relecloud 31

Rental Lines Manage Line Function + New

Click on the button **Show more**

✓ SAVED

Show more

0.00

0.00

Click on the field **Original Time Zone**

Note that both the Original Time Zone and Current Time Zone are the same and that there is no Time Zone Difference.

PS

0.00

0.00

0.00

Mountain Standard Time

Mountain Standard Time Mountain Standard Time

Click on the button **Show less**

✓ SAVED

Show less

4/8/2019

4/8/2019



Click on the cell **Rental Unit No.**

Document Date 4/8/2019

Rental Lines | Manage | Line | Functions | Fewer options

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Sales Lines | Manage | Line | Fewer options

Click on the lookup button in the cell **Rental Unit No.**

Document Date 4/8/2019

Rental Lines | Manage | Line | Functions | Fewer options

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION

Look up value

Sales Lines | Manage | Line | Fewer options

Click on the link in cell **No.** with the value **RU00001**

NO. ↑	DESCRIPTION	GR
PG-001	Portable Generators	
RP00001	Mini Excavator with Vibrator Plate	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Terms Code** with the value **MONTH-END**

Document Date 4/8/2019

Manage | Line | Functions | Fewer options

STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-END	0	

Manage | Line | Fewer options


UNIT OF



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Terms Code**


..... 4/8/2019 Outstanding Amount

Line	Functions	Fewer options			
RD DE	DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
	Buckeye Ditcher Group	MONTH- 	0		

ne Fewer options

UNIT OF

Click on the link in cell **Code** with the value **MONTH-END-TIME**


T CODE	DESCRIPTION	CODE	QUANTITY	CODE	CODE A
	Buckeye Ditcher Group	MONTH-EI 	0		

CODE	DESCRIPTION
MONTH-END-OPT	Monthly Rental for Optimiz
MONTH-END-OPT-...	Monthly Rental for Optimiz
MONTH-END-PROR...	Monthly Rental for Prorated
MONTH-END-TIME	Monthly Rental for Billing at
MONTH-	Select record "MONTH-END-TIME" - Per. Billing
MONTH-PEND EARLY	Monthly Rental - Early Per. E

+ New

Click on the cell **Rental Quantity** with the value **0**

..... 4/8/2019 Outstanding Amount


Functions	Fewer options			
DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	END-TIME 	0		

Fewer options

UNIT OF

Enter the text **1**.

..... 4/8/2019 Outstanding Amount

Functions	Fewer options			
DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI
Buckeye Ditcher Group	MONTH-END- 			

Fewer options

UNIT OF



Click on the cell **Location Code**

019					Outstanding Amount	.....
Fewer options						
	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	R S D
r Group	MONTH-END...					4/
UNIT OF						

Click on the link in cell **Code** with the value **EAST**

options						
	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE ALT2	REQUIR SHIPPIN DATE
up	MONTH-END...	1				4/8/2019
up	MONTH-END...	1				
CODE ↑ NAME						
EAST East Warehouse						
RENTRESERV Inventory Items Rental Res						
WEST West Warehouse						
+ New						
	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	A EX

Click on the cell **Shipment Time** with the value
12:00:00 AM

Amount						
5,610.00						
RENTAL TERMS CODE ALT2						
REQUIRED SHIPPING DATE						
SHIPMENT DATE						
SHIPMENT TIME						
RENTAL START DATE						
RENTAL START TIME						
RENTAL RETURN DATE						
	4/8/2019	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019
	4/8/2019	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019

When there is a default Rental Term on the group which has the setting of Tracking Date Only, and the term is changed to one that has the setting of Tracking Date and Time, then the Shipment Time field is not automatically updated to the Rental Start Time.

The Shipment Time can be updated manually prior to shipping to the actual time of shipment.
Should the time not be updated, then when the shipment is posted the Shipment Time is automatically set to the Rental Start Time.

Click on the cell **Rental Start Date** with the value
4/8/2019

5,610.00						
REQUIRED SHIPPING DATE						
SHIPMENT DATE						
SHIPMENT TIME						
RENTAL START DATE						
RENTAL START TIME						
RENTAL RETURN DATE						
	4/8/2019	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019
	4/8/2019	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019



Click on the cell **Rental Start Time** with the value
3:38:43 PM

5,610.00					
ID	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
G	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019
	4/8/2019	12:00:00 AM	4/8/2019	3:38:43 PM	5/8/2019

Click on the cell **Rental Return Date** with the value
5/8/2019

Document Date 4/8/2019					
Rental Lines | Manage | Line | Functions | Fewer options					
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	UNIT	
RU00001	5/8/2019	3:38:42 PM	5,000.00		
	5/8/2019	3:38:42 PM	5,000.00		
Sales Lines | Manage | Line | Fewer options					

Click on the cell **Rental Return Time** with the value
3:38:42 PM

Document Date 4/8/2019					
Rental Lines | Manage | Line | Functions | Fewer options					
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE	UN
RU00001	5/8/2019	3:38:42 PM	5,000.00	0.00	
	5/8/2019	3:38:42 PM	5,000.00	0.00	
Sales Lines | Manage | Line | Fewer options					

Note that the Required Shipping Date, Shipment Date and Rental Start Date are all the same date.

The Rental Start Date is automatically set to the Document Date and the Required Shipping Date defaults from the Rental Start Date. The Shipment Date defaults from the Shipment Date on the Shipping tab, which defaults from the Document Date.

Also note that the Shipment Time and Rental Start Time are not the same time.

The date and the time fields can be overridden when the Rental Term has the setting of Tracking Date and Time.

Click on the cell **Rental Unit No.**

Rental Lines | Manage | Line | Functions | Fewer options					
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL RETURN TIME	RENTAL UNIT PRICE		
RU00001	5/8/2019	3:38:42 PM	5,000.00		
	5/8/2019	3:38:42 PM	5,000.00		
Sales Lines | Manage | Line | Fewer options					



Click on the lookup button in the cell **Rental Unit No.**

<

Click on the link in cell **No.** with the value **RU00002**

RENTAL UNIT LIST		
NO. ↑		DESCRIPTION
BD-000		Buckeye Ditcher
RU00002		Buckeye Ditcher
RU00003		Buckeye Ditcher
RU00005		Buckeye Ditcher
SUB BUCKEYE		Sub Buckeye Ditcher

Click on the cell **Rental Unit No.** with the value **RU00002**

<

Rental Lines			Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION				
RU00001	:	Buckeye Ditcher Group				
RU00002	:	Buckeye Ditcher				
	RU000002					
Sales Lines			Manage	Line	Fewer options	

The following demonstrates the reviewing of the Rental Amount Lines for the unit.

Click on the navigation menu item popup **Line**

Quote No.

Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines | Manage **Line** Functions Fewer options

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-
RU00002 ...		Buckeye Ditcher	MONTH-



Click on the navigation menu item **Rental Amount Lines**

Posting Date: 4/9/2019
Order Date: 4/8/2019
Document Date: 4/8/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Va

UNIT NO. | View the rental amount line records that will be billed for the

RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher

Click on the cell **Starting Date-Time** with the value **4/8/2019 3:38 PM**

VIEW - RENTAL LINE RENTAL AMOUNTS

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 3:38 PM	5/8/2019 3:38 PM
Damage Waiver	4/8/2019 3:38 PM	5/8/2019 3:38 PM

Click on the cell **Ending Date-Time** with the value **5/8/2019 3:38 PM**

VIEW - RENTAL LINE RENTAL AMOUNTS

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	4/8/2019 3:38 PM	5/8/2019 3:38 PM	1
Damage Waiver	4/8/2019 3:38 PM	5/8/2019 3:38 PM	1

Notice the dates and times in the date-time fields for comparison purposes when opening the contract in a different time zone.

Click on the cell **Billing Date** with the value **5/8/2019**

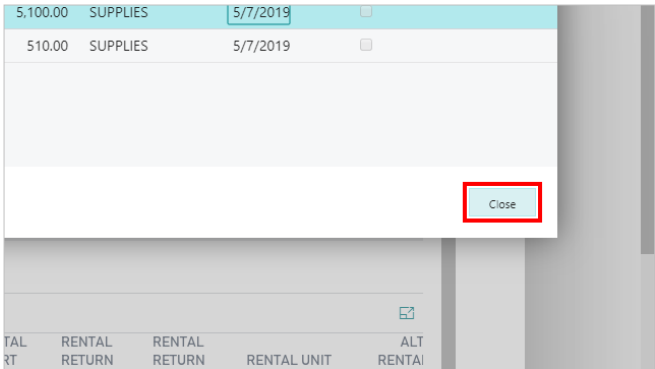
Take notice of the Billing Date on the unit, for comparison purposes when opening the contract in a different time zone.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
5,100.00	SUPPLIES	5/8/2019		
510.00	SUPPLIES	5/8/2019		



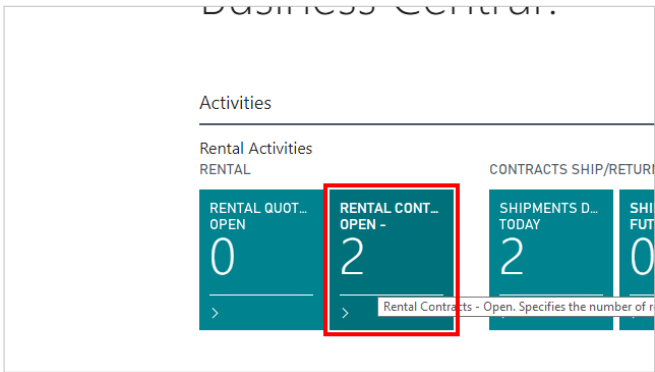
ODT Rentals Online Help

Click on the button **Close**

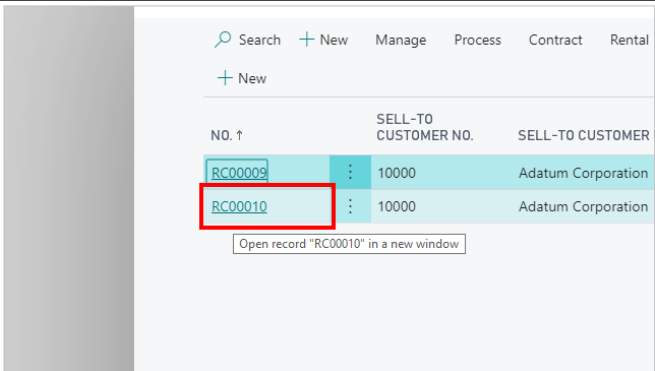


The following demonstrates the opening of the contract and the shipping of the contract from the Eastern Standard Time Zone.

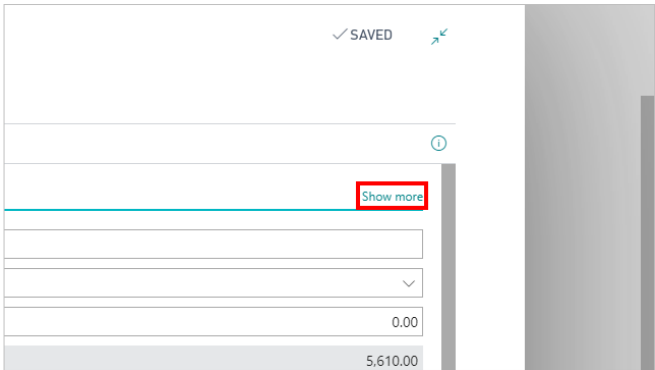
Click on the link **Rental Contracts - Open 2**



Click on the link in cell **No.** with the value **RC00010**



Click on the button **Show more**





ODT Rentals Online Help

Click on the field **Current Time Zone**

Note that the Current Time Zone displays Eastern Standard Time which is the zone the user opening the contract is located in.

Click on the field **Time Zone Difference**

Note that the Time Zone Difference field is displaying -2 hours.
This is as the Original Time Zone is 2 hours behind the Current Time Zone.

Click on the button **Show less**

Click on the cell **Shipment Time** with the value **2:00:00 AM**

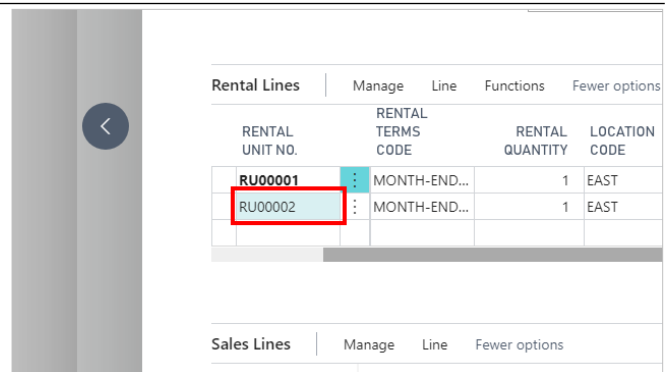
Note that the Shipment Time now displays 2:00 AM rather than 12:00 AM.

Amount				5,610.00		

same day.

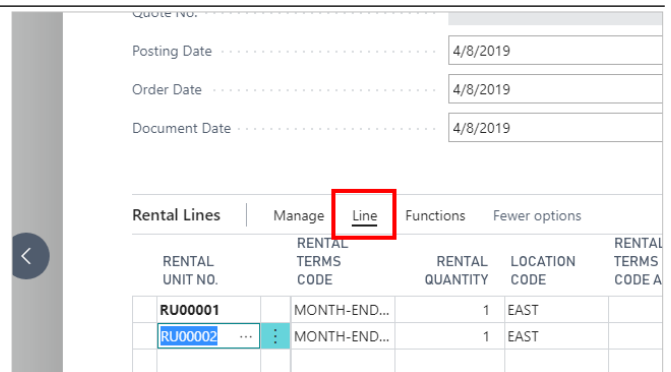
Had the change in time zone result in the Rental Return Time being for a different date, then the Rental Return Date would have changed to reflect that date.

Click on the cell **Rental Unit No.** with the value **RU00002**



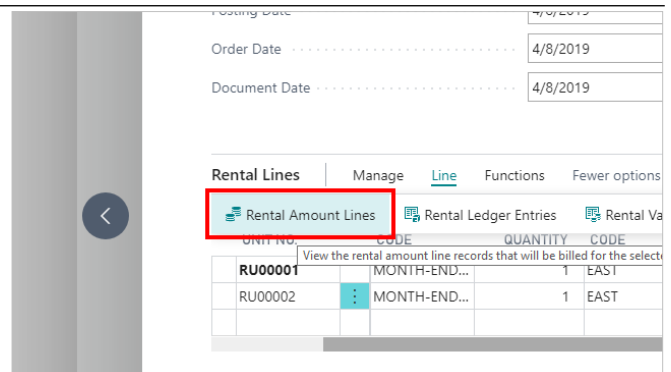
Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	
RU00001	MONTH-END...	1	EAST	
RU00002	MONTH-END...	1	EAST	

Click on the navigation menu item popup **Line**



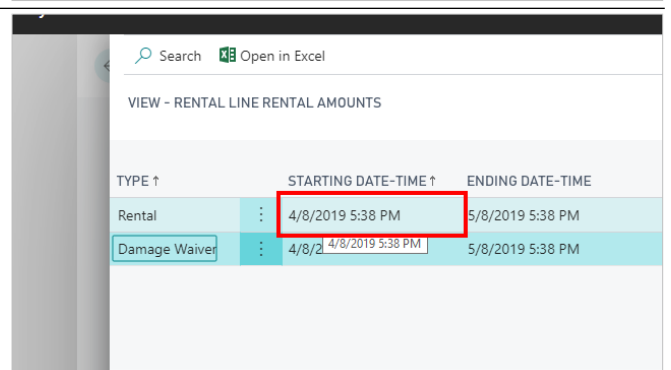
Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
RU00001	MONTH-END...	1	EAST	
RU00002	MONTH-END...	1	EAST	

Click on the navigation menu item **Rental Amount Lines**



Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
RU00001	MONTH-END...	1	EAST	
RU00002	MONTH-END...	1	EAST	

Click on the cell **Starting Date-Time** with the value **4/8/2019 5:38 PM**



TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 5:38 PM	5/8/2019 5:38 PM
Damage Waiver	4/8/2019 5:38 PM	5/8/2019 5:38 PM



Click on the cell **Ending Date-Time** with the value
5/8/2019 5:38 PM

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	4/8/2019 5:38 PM	5/8/2019 5:38 PM	1
Damage Waiver	4/8/2019 5:38 PM	5/8/2019 5:38 PM	1

Notice that the date and time fields are displaying the same date and times as on the Rental Line.

Click on the cell **Billing Date** with the value **5/8/2019**
When the rental term on the Rental Line has the setting of Tracking Date and Time, then the Billing Date may change when opening the contract in a different time zone.

In this example, the Billing Date remains the same.

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
5,100.00	SUPPLIES	5/8/2019		
510.00	SUPPLIES	5/8/2019		

Click on the button **Close**

5,100.00	SUPPLIES	5/8/2019	
510.00	SUPPLIES	5/8/2019	

Close

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00010

Process Contract **Rental** Actions Navigate Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.



Click on the navigation menu item **Ship Rentals**

RENTAL CONTRACT | WORK DATE: 4/8/2019

Rental Contract · RC00010

Process Contract Rental Actions Navigate Fewer

Ship Rentals Return Rentals Bulk Returns Invo

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/8/2019

Click on the button **Yes**

Outstanding Amount

? Are you sure you want to Ship this rental contract?

Yes No

RENTAL START TIME	RENTAL RETURN DATE
5:38:43 PM	5/8/2019
5:38:43 PM	5/8/2019

Click on the button **OK**

Outstanding Amount

Shipment Posted Successfully.

OK

RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
5:38:43 PM	5/8/2019	5:38:43 PM
5:38:43 PM	5/8/2019	5:38:43 PM

Click on the cell **Shipment Time** with the value **5:38:43 PM**

Note that when shipped, if the Shipment Time is not manually updated, then the field is set to the Rental Start Time.

RENTAL TERMS CODE ALT2	REQUIRED SHIPPING DATE	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
	4/8/2019	4/8/2019	2:00:00 AM	4/8/2019	5:38:43 PM	5/8/2019
	4/8/2019	4/8/2019	5:38:43 PM	4/8/2019	5:38:43 PM	5/8/2019

UNIT OF	LINE	AMOUNT
---------	------	--------

The following provides a review of the Transaction Date-Time field, on the Rental Ledger Entries.



ODT Rentals Online Help

Click on the link **Line**

Posting Date 4/8/2019
Order Date 4/8/2019
Document Date 4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE A
RU00001	MONTH-END...	1	EAST	
RU00002	MONTH-END...	1	EAST	

Click on the navigation menu item **Rental Ledger Entries**

Posting Date 4/8/2019
Order Date 4/8/2019
Document Date 4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
Rental Amount Lines	Rental Ledger Entries	Rental Value Entries		
UNIT NO.	CODE	CODE	CODE	CODE
RU00001	MONTH-END...	1	EAST	
RU00002	MONTH-END...	1	EAST	

Click on the cell **Transaction DateTime** with the value **4/8/2019 5:38 PM**

Notice that the Transaction Date Time is displaying the date and time the shipment occurred on based on the time zone of the current user.

NO. SERIAL NO. TRANSACTION DATETIME QUANTITY

RU00002	BD-002	4/8/2019 5:38 PM	-1
---------	--------	------------------	----

Click on the button **Close**

-1.00 RC00010 3

Close

The following demonstrates the opening of the contract, and the invoicing of the contract from the Central Standard Time Zone.



Click on the link **Rental Contracts - Open 2**

Activities

Rental Activities

RENTAL

CONTRACTS SHIP/RETURN

RENTAL QUOT...
OPEN
0

RENTAL CONT...
OPEN -
2

SHIPMENTS D...
TODAY
1

SHI
FUT
0

Rental Contracts - Open. Specifies the number of r

Click on the link in cell **No.** with the value **RC00010**

Search + New Manage Process Contract Rental		
+ New		
NO. ↑	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER
RC00009	10000	Adatum Corporation
RC00010	10000	Adatum Corporation

Click on the button **Show more**

✓ SAVED

Show more

Click on the field **Current Time Zone**

PS

0.00

5,610.00

5,610.00

Mountain Standard Time

Central Standard Time

-1 hour

Central Standard Time



ODT Rentals Online Help

Click on the field **Time Zone Difference**

Note that the Time Zone Difference field is displaying -1 hours.

This is as the Original Time Zone is 1 hour behind the Current Time Zone.

AL	S	REQUIRED SHIPPING	SHIPMENT	SHIPMENT	RENTAL START	RENTAL START	RENTAL RETURN

Click on the button **Show less**

REQUIRED SHIPPING DATE	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
4/8/2019	4/8/2019	1:00:00 AM	4/8/2019	4:38:43 PM	5/8/2019

Click on the cell **Rental Start Date** with the value **4/8/2019**

REQUIRED SHIPPING DATE	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
4/8/2019	4/8/2019	1:00:00 AM	4/8/2019	4:38:43 PM	5/8/2019

Click on the cell **Rental Start Time** with the value **4:38:43 PM**

REQUIRED SHIPPING DATE	SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
4/8/2019	4/8/2019	1:00:00 AM	4/8/2019	4:38:43 PM	5/8/2019

Notice that the Rental Start Date remains the same even though the time change is 1 hour between Mountain Standard Time and Central Standard Time.

This is as the Rental Start Time was automatically updated from 3:48:43 PM to 4:38:43 PM on the same day.



Click on the cell **Rental Return Date** with the value **5/8/2019**

SHIPMENT DATE	SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE
4/8/2019	1:00:00 AM	4/8/2019	4:38:43 PM	5/8/2019
4/8/2019	4:38:43 PM	4/8/2019	4:38:43 PM	5/8/2019

Click on the cell **Rental Return Time** with the value **4:38:42 PM**

SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
1:00:00 AM	4/8/2019	4:38:43 PM	5/8/2019	4:38:42 PM
4:38:43 PM	4/8/2019	4:38:43 PM	5/8/2019	4:38:42 PM

Notice that the Rental Return Date has not changed from the original zone date.

This is due to the Rental Return Time changing by 1 hour between Mountain Standard Time and Central Standard Time. The Rental Return Time was automatically updated from 3:38:42 PM to 4:38:42 on the same day.

The following demonstrates the reviewing of the Rental Amount Lines for the unit.

Click on the navigation menu item popup **Line**

Quote No.




Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines | Manage **Line** Functions Fewer options

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
RU00001		Buckeye Ditcher Group	MONTH-
RU00002 ...		Buckeye Ditcher	MONTH-

Click on the navigation menu item **Rental Amount Lines**

Posting Date	4/8/2019
Order Date	4/8/2019
Document Date	4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
 Rental Amount Lines	 Rental Ledger Entries	 Rental Va		

UNIT NO.	STANDARD TEXT CODE	DESCRIPTION
RU00001		Buckeye Ditcher Group
RU00002		Buckeye Ditcher



Click on the cell **Starting Date-Time** with the value
4/8/2019 4:38 PM

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME
Rental	4/8/2019 4:38 PM	5/8/2019 4:38 PM
Damage Waiver	4/8/2019 4:38 PM	5/8/2019 4:38 PM

Click on the cell **Ending Date-Time** with the value
5/8/2019 4:38 PM

TYPE ↑	STARTING DATE-TIME ↑	ENDING DATE-TIME	EXTENDED QUANTITY
Rental	4/8/2019 4:38 PM	5/8/2019 4:38 PM	1
Damage Waiver	4/8/2019 4:38 PM	5/8/2019 4:38 PM	1

Notice that the date and time fields are displaying the same date and times as on the Rental Line.

Click on the cell **Billing Date** with the value **5/8/2019**

AMOUNT INCLUDING TAX	TAX GROUP CODE	BILLING DATE	BILLED	INVOICE NO.
5,100.00	SUPPLIES	5/8/2019	<input type="checkbox"/>	
510.00	SUPPLIES	5/8/2019	<input type="checkbox"/>	

When the rental term on the Rental Line has the setting of Tracking Date and Time, then the Billing Date may change. This is dependent on which time zone the user is located in, and the time difference from the original time zone.

In this example, the time zone difference is not great enough to result in a different Billing Date from the originating time zone Billing Date.

Click on the button **Close**

5,100.00	SUPPLIES	5/8/2019	<input type="checkbox"/>	
510.00	SUPPLIES	5/8/2019	<input type="checkbox"/>	

Close



Click on the field **Posting Date**

Rental | Actions | Navigate | Fewer options

Adatum Corporation	Ext
	Ren
4/8/2019	Dep
4/8/2019	Cor
4/8/2019	Out

Manage | Line | Functions | Fewer options

Click on the link **Open the date picker**

Fewer options

orporation	External Document No.
	Rental Terms Code
	Deposit Amount
	Outstanding Amount

Open the date picker

Click on the link **Next**

Adatum Corporation

4/8/2019

April 2019

Next

Line Function

RENTAL

Click on a date in the calendar

Select a date that is equal to or later than the Billing Date in the Rental Amount Lines.

er Name

Adatum Corporation

4/8/2019

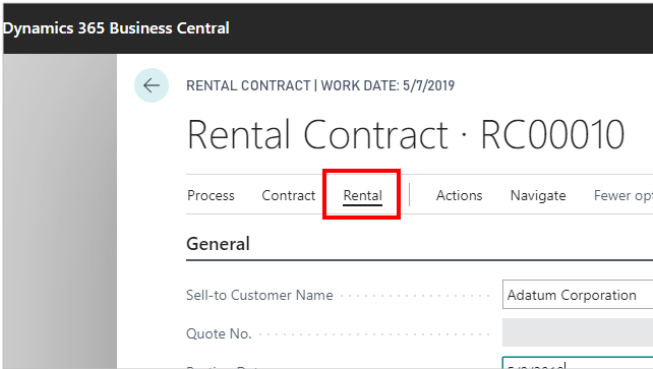
May 2019

Today Done

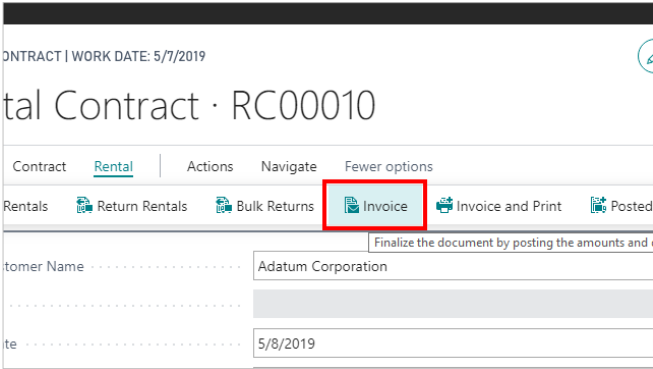
STANDARD TEXT CODE	DESCRIPTION	CODE	RENTAL QUANTITY	LOCATION CODE
	Buckeye Ditcher Group	MONTH-END...	1	EAST



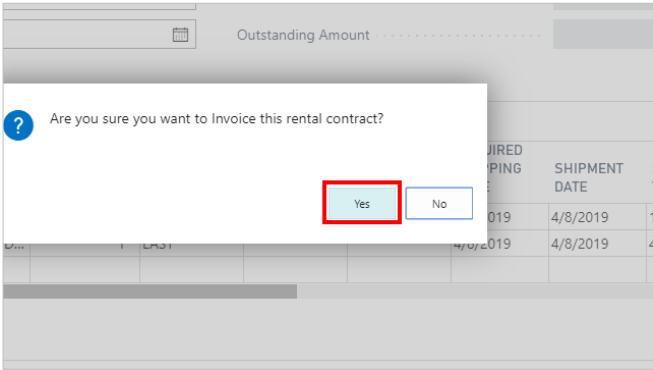
Click on the navigation menu item popup **Rental**



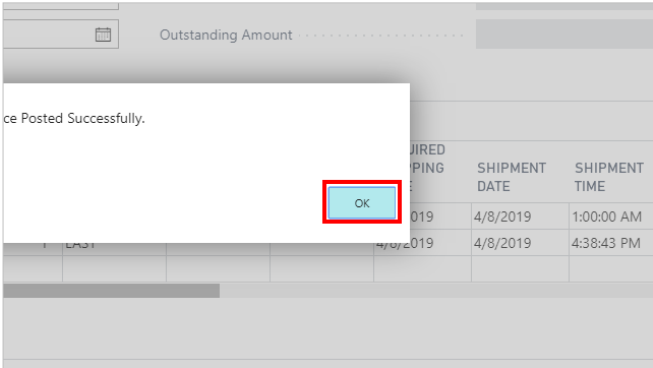
Click on the navigation menu item **Invoice**



Click on the button **Yes**



Click on the button **OK**



When the rental term on the rental lines has the setting of Tracking Date and Time, then the Posted Rental Invoice will display the dates based on the time zone the user is located in.

The following demonstrates the opening of the contract, and the returning of the contract from the Eastern Standard Time Zone.

NOTE:
As the date and time fields have been covered in the shipping from the Eastern Standard Time, they will not be covered in this section.



Click on the link **Rental Contracts - Open 2**

Click on the link in cell **No.** with the value **RC00010**

Click on the field **Posting Date**

Verify that the Posting Date is the date on which the return is to be posted.

If it differs from the date in the field, then select the applicable date.

In this example, the unit is being returned on the date which is displayed in the Rental Return Date field.

Click on the cell **Rental Return Date** with the value **5/8/2019**



ODT Rentals Online Help

Click on the cell **Rental Return Time** with the value **5:38:42 PM**

Should the time the unit is being return differ from the time in the Rental Return Time field, then enter the applicable time.

In this example, the unit is being returned at the time as displayed in the Rental Return Time field.

SHIPMENT TIME	RENTAL START DATE	RENTAL START TIME	RENTAL RETURN DATE	RENTAL RETURN TIME
00:00 AM	4/8/2019	5:38:43 PM	5/8/2019	5:38:42 PM
5:38:43 PM	4/8/2019	5:38:43 PM	5/8/2019	5:38:42 PM

Click on the cell **Qty. to Return** with the value **0**

CURRENCY CODE	TAX GROUP CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE. DAY BIL
	SUPPLIES	0	0	0	0	0	
	SUPPLIES	0	1	0	0	0	

Enter the text **1**.

CURRENCY CODE	TAX GROUP CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE. DAY BIL
	SUPPLIES	0	0	0	0	0	
	SUPPLIES	0	1	1	0	0	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← ← RENTAL CONTRACT | WORK DATE: 5/8/2019

Rental Contract · RC00010

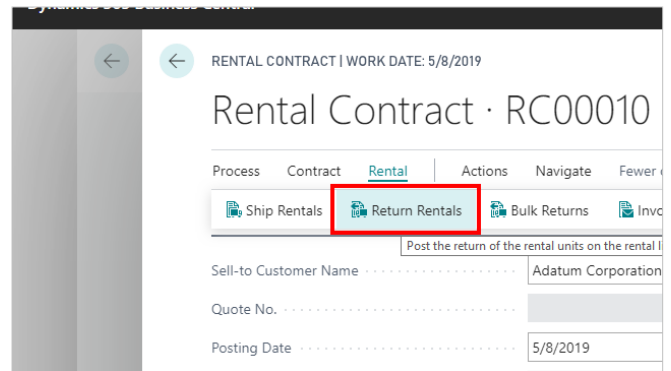
Process Contract **Rental** Actions Navigate Fewer options

General

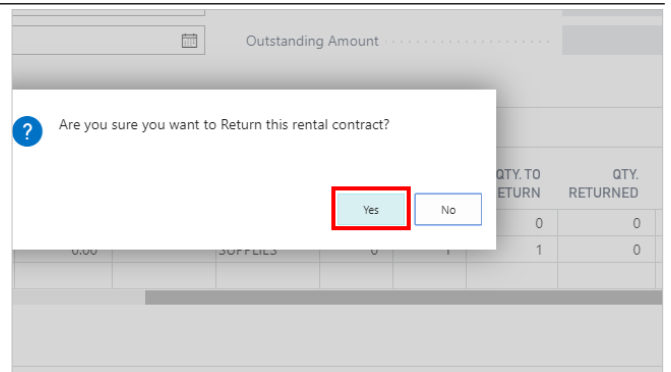
Sell-to Customer Name Adatum Corporation

Quote No.

Click on the navigation menu item **Return Rentals**



Click on the button **Yes**



4.11.Integration with Jobs

4.11.1. Integration with Jobs Overview

4.11.1.1. Overview

The integration with Jobs feature provides the ability to accumulate information without any integration, and with integration between Jobs and the ODT Rentals.

The integration between Jobs and ODT Rentals provides the following features:

- The ability to append Job Planning Lines from a Job to the Sales Lines on a Rental Contract. When the contract sales lines are invoiced, the applicable Job Planning Lines are updated, and Job Ledger Entries are created.
- Job Planning Lines that are ready for billing and have a type of Billable, or Budget and Billable, can be appended to the Sales Lines on an open Rental Contract. Alternatively, a new Rental Contract can be automatically created when choosing to append the Job Planning Lines.
- Setup Jobs as Template Jobs, with the Tasks for quoting Jobs from a Rental Quote.
- From a Rental Quote utilizing a Template Job with Tasks specified create a Job directly or automatically when the quote is converted to a contract.
- On the Job card specify whether Sales Lines on a Rental Quote are to be copied to the Rental Contract when Make Contract is ran on the quote.
- Create a Rental Contract from a Job.
- Specify whether rental documents are linked to Job Planning Lines on a per Job basis, which automatically creates Job Planning Lines on the Job selected on the General tab of the rental document.



- When a Job or Template Job has specified that rental documents are linked to Job Planning Lines and is entered on the header of a Rental Quote, then when rental and sales lines are entered, Job Planning Lines with the type of Budget are automatically created per rental line and per sales line.
- When a Job has specified that rental documents are linked to Job Planning Lines and is entered on the header of a Rental Contract, then when invoicing the Rental Contract, billable type Job Planning Lines are created on the Job, for both the rental and sales lines invoiced and Job Ledger Entries are created.
- Specify how Dimensions are managed when creating Jobs from a Rental Quote or when a quote is converted to a Rental Contract.
- Specify how Dimensions are managed when a Job No. is selected on a Rental Quote or Contract, General tab.
- A Job Rental Contracts fact box is on the Job card, which displays a list of contracts, which have the Job No. specified on the General tab.
- A Job History fact box is on the Jobs list and card, which contains cues displaying the number of completed rental contracts, ongoing rental contracts and ongoing rental contract lines which are linked to the Job Planning Lines on the Job. Cues are also included which display the number of completed rental quotes and ongoing rental quotes. The respective list of contracts or quotes are displayed.

CRITICAL INFORMATION

When the Customer on the Job is a Foreign Currency customer, and planning lines are to be appended to a Rental Contract having the same customer, the Currency Code field must be populated on the Job. Currently the Invoice Currency Code cannot be used when appending Job Planning Lines to a Rental Contract

NOTE:

When an organization is using the Rentals Dispatch feature, then there are additional features available related to Jobs.

To learn about the features available when using Rentals Dispatch, please see the Rentals Dispatch user help located in the Additional Rental Processes.

4.11.1.2. Job Card Enhancements

Multiple enhancements have been added to the Job cards for the integration of Jobs with ODT Rentals.

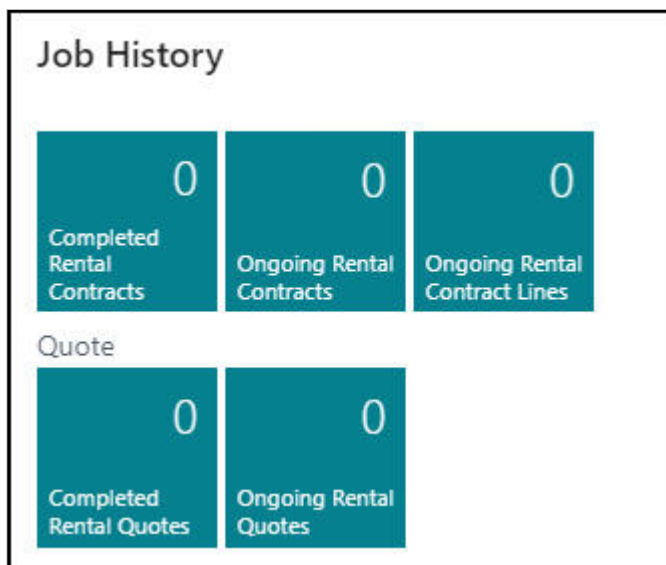
4.11.1.2.1. Job Fact Boxes

On the Job cards, a Job Rental Contracts fact box has been added, which displays all the Rental Contracts that have been linked to the Job.

The Rental Contract can be opened by clicking on a contract number, in the Job Rental Contracts fact box.

Job Rental Contracts ✓	
No. ↑	Sell-to Customer Name
RC00064	Adatum Corporation
RC00069	⋮ Adatum Corporation

A Job History fact box has been added to the Jobs list and card.



The fact box contains two sections, one for Rental Contracts and the other for Rental Quotes.

- The Rental Contract section includes 3 cues for Rental Contracts displaying the number of completed rental contract, ongoing (open) rental contracts and ongoing rental contract lines which are linked to the Job.
- The Rental Quote section includes 2 cues for Rental Quotes displaying the number of completed rental quotes, ongoing (open) rental quotes that are linked to the Job.
- When the number in a cue is clicked on, then a list of the related records is displayed.

4.11.1.2.2.

Job Card Fields and Menu Options

Fields added to the Job Card:

Template

Specifies that the Job is a template job that contains the Job Tasks only. No Job Planning Lines are to be created on a Job with Template enabled.

Template Jobs are for use on Rental Quotes, when quoting a customer using Rental Quotes instead of quoting from a Job.

The customer selected on the template Job is not used when the Job Template No. is selected on a Rental Quote.



Link Rental Cont. to JPL

This field is used to specify whether the Rental Quote or Rental Contract, rental and sales lines will be linked to Job Planning Lines on the Job.

Transfer Sales Lines to Rental Contract

This field is used to specify whether sales lines on rental quotes are to be transferred to rental contracts during Make Contract process.

This field is only available when the Link Rental Cont. to JPL is enabled.

Rental Quotes

When Link Cont. to JPL is enabled on a Job Template No. and the template is selected on a Rental Quote, general tab, the Template Job No, defaults to the rental and sales lines. The Job Task No. must be selected. Then when either run Create Job or Make Contract, the Job is created for the Job Task Nos. on the lines and Budget Job Planning Lines are created.

When disabled on a Template Job that is selected on a Rental Quote, and the Create Job or Make Contract are run, then when the Job is created the Tasks are created on the Job, but Budget Job Planning Lines are not created.

When enabled on a Job card and the Job No. is selected on a Rental Quote, general tab and the rental and sales lines are entered with the Job No. and Job Task No. populated, then Budget Job Planning Lines are created on the Job.

When disabled on a Job card and the Job No. is selected on a Rental Quote, general tab and the rental and sales lines are entered with the Job No. and Job Task No. populated, then Budget Job Planning Lines are not created on the Job.

Rental Contracts

When enabled on a Job No. and the Job is selected on a Rental Contract, then when an invoice is posted from the contract, Billable Job Planning Lines are created from the rental and sales lines on the contract.

When disabled on a Job and the Job No. is selected on a Rental Contract, then when an invoice is posted from the contract, Job Planning Lines will not be created from the rental and sales lines on the contract.

To append Job Planning Lines from a Job that has the Link Rental Cont. to JPL enabled, then the Job Planning line Type must set as Billable.

To append Job Planning Lines from a Job that has the Link Rental Cont. to JPL disabled, then the Job Planning line Type can be set as Both Budget and Billable, or as Billable.

CRITICAL

When the Link Rental Cont. to JPL field is enabled on the Job, then the Apply Usage Link and Allow Budget/Billable Lines fields are to be disabled. It is mandatory that the Apply Usage Link field be disabled on the Job cards in order to automatically create the Billable type, Job Planning Lines when a Rental Contract.

Rentals Menu Option on Job List and Job Card

The Rentals menu option has been added, which contains the sub-menu option, Create Contract from Job. The Rentals menu option with the sub-menu option, Create Contract from Job is also located in the Actions main menu option.

- The Create Contract from Job automatically creates a Rental Contract for the Customer specified on the Job card. The Dimensions specified on the Job will flow to the contract based on the Jobs Setup settings.
- The Create Contract from Job cannot be used when the Job Card has the Template field enabled. An error will occur as the Job No. field on Rental Contracts does not allow a Job No. with the Template field enabled. An example of the error is, "The field Job No. of table Rental Contract Header contains a value

(TEMPLATE 1) that cannot be found in the related table (Job).

- Related – View Change Log Entries, which is displayed only when on Change Log Setup, the Job table has been added, settings configured, and the Change Log is activated.

4.11.1.2.3.

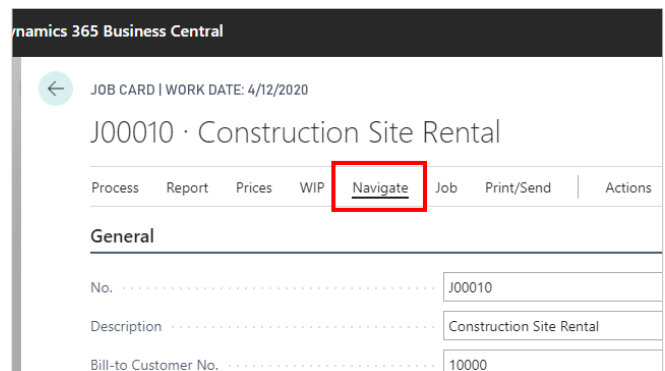
Job Card Enhancements for Appending to Contracts

Job Planning Lines that are ready for billing and have a type of Billable, or Budget and Billable, can be appended to the Sales Lines on an open Rental Contract. Alternatively, a new Rental Contract can be automatically created, and the planning lines added to the new contract sales lines.

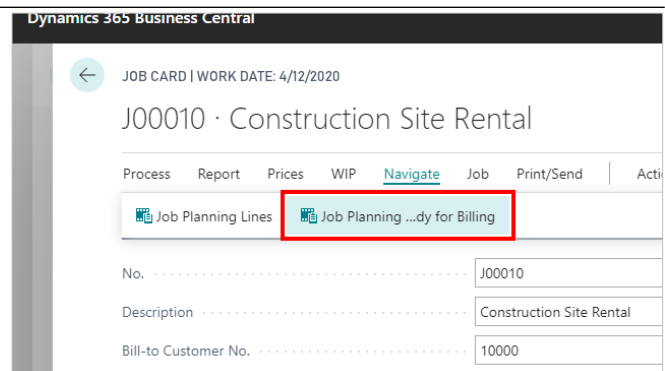
A Job Planning Lines Ready for Billing page has been added, which displays only the planning lines ready for billing. Thus, making it easier to select the lines to append to a contract.

The planning lines cannot be modified on this page.

Click on the navigation menu item popup **Navigate**



Click on the navigation menu item **Job Planning Lines Ready for Billing**



The Job Planning Lines Ready for Billing can as well be accessed from the right hand menu option of Navigate, then Jobs.

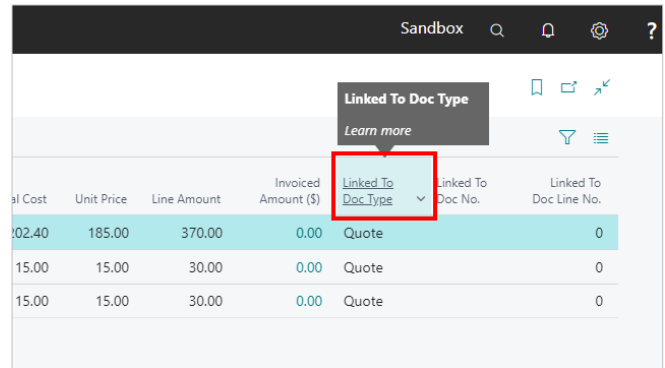
The following picture is an example of the Job Planning Lines Ready for Billing.

Job No. ↑	Job Task No.	Line Type	Planning Date ↑	Planned Delivery Date	Document No. ↑	Type	No.	Description	Quantity	Unit Cost	Total Cost	Unit Price	Line Amount	Invoiced Amount (\$)	Linked To Doc Type	Linked To Doc No.	Linked To Doc Line No.
J00010	1020	Both Budge...	4/12/2020	4/12/2020		Resource	MARY	Mary A. Dempsey Deliv...	2	101.20	202.40	185.00	370.00	0.00	Quote		0
J00010	1110	Both Budge...	4/12/2020	4/12/2020		Item	1005	Generator Lubricant	2	7.50	15.00	15.00	30.00	0.00	Quote		0
J00010	1110	Both Budge...	5/12/2020	5/12/2020		Item	1005	Generator Lubricant	2	7.50	15.00	15.00	30.00	0.00	Quote		0

The following fields, which are related to the Job Integration, have been added to the Job Planning Lines Ready for Billing and are displayed by default.

Click on the column header **Linked To Doc Type**

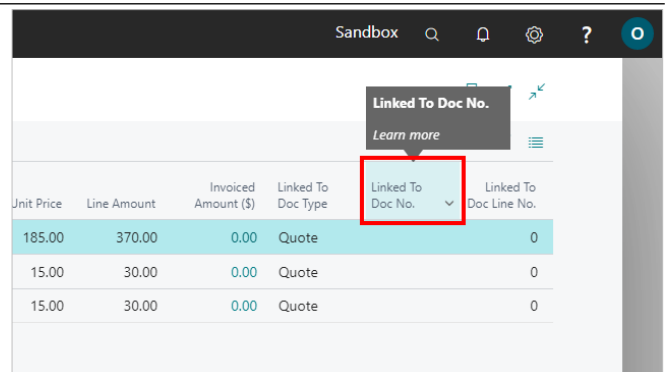
Specifies the type of document the planning line will be or is linked to. The field is set to Quote and cannot be modified.



Unit Price	Line Amount	Invoiced Amount (\$)	Linked To Doc Type	Linked To Doc No.	Linked To Doc Line No.
102.40	185.00	370.00	Quote		0
15.00	15.00	30.00	Quote		0
15.00	15.00	30.00	Quote		0

Click on the column header **Linked To Doc No.**

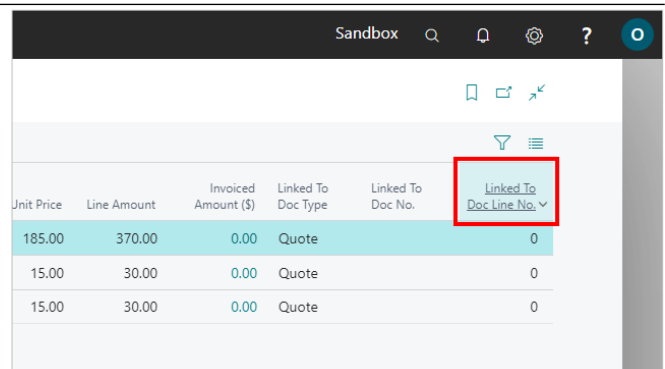
Specifies the linked rental document no. when a planning line is appended to a rental contract.



Unit Price	Line Amount	Invoiced Amount (\$)	Linked To Doc Type	Linked To Doc No.	Linked To Doc Line No.
185.00	370.00	0.00	Quote		0
15.00	30.00	0.00	Quote		0
15.00	30.00	0.00	Quote		0

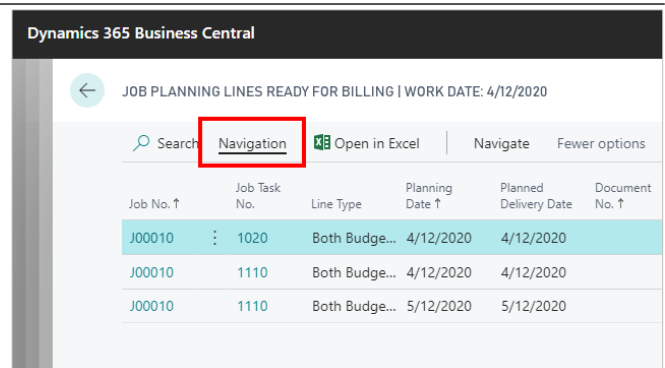
Click on the column header **Linked To Doc Line No.**

Specifies the rental document line no. that the planning line is linked to when the planning line has been appended to a rental contract.



Unit Price	Line Amount	Invoiced Amount (\$)	Linked To Doc Type	Linked To Doc No.	Linked To Doc Line No.
185.00	370.00	0.00	Quote		0
15.00	30.00	0.00	Quote		0
15.00	30.00	0.00	Quote		0

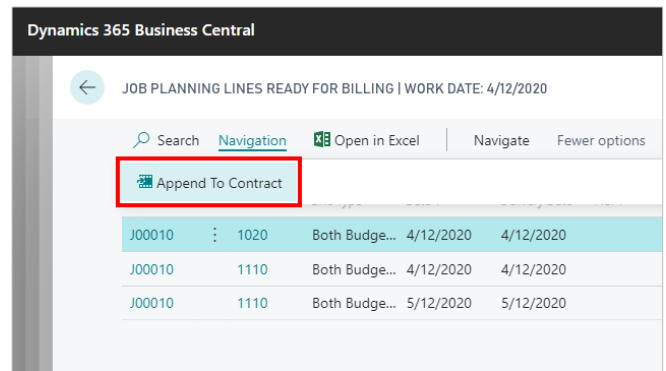
Click on the navigation menu item popup **Navigation**



Job No. ↑	Job Task No.	Line Type	Planning Date ↑	Planned Delivery Date	Document No. ↑
J00010	1020	Both Budge...	4/12/2020	4/12/2020	
J00010	1110	Both Budge...	4/12/2020	4/12/2020	
J00010	1110	Both Budge...	5/12/2020	5/12/2020	

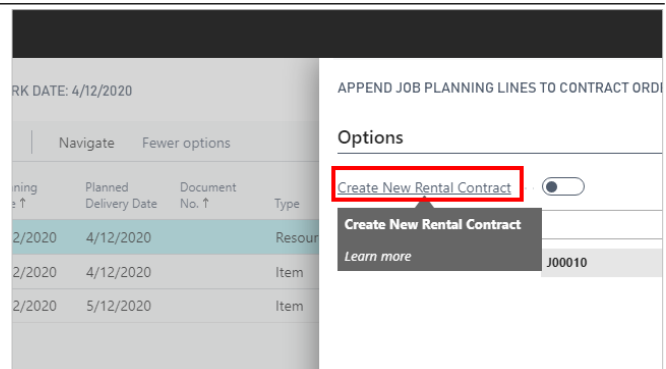
Click on the navigation menu item **Append To Contract**

This menu option is used for appending selected lines in the Job Planning Lines Ready for Billing page to a Rental Contract Sales Lines.



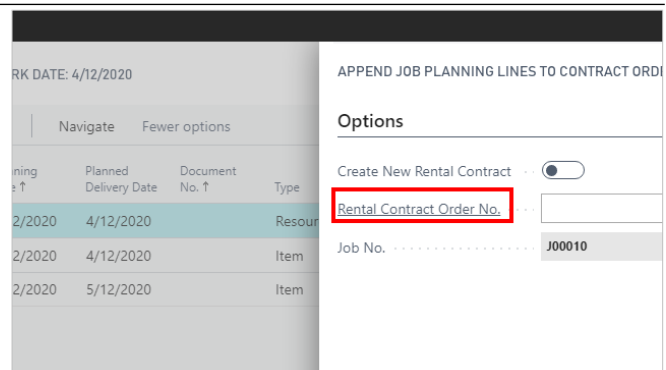
Click on the link **Create New Rental Contract**

Specifies whether a new rental contract is to be created for the customer on the job.



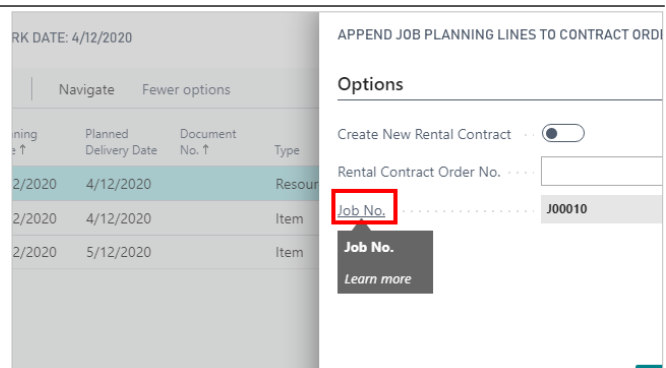
Click on the link **Rental Contract Order No.**

When not creating a new contract, then look-up and select the Rental Contract that is linked to the Job that the planning lines are to be appended to.



Click on the link **Job No.**

Displays the Job no, that the planning lines will be appended from.



NOTE:

On the Job Planning Lines, the menu option of Append to Contract is located in the Process menu option and the Actions, Functions menu option.

4.11.1.3. Rental Quote Enhancements

GENERAL TAB

The Job Template No. and Job No. fields are accessed by selecting Show more on the General tab.

Job Template No.

Specifies the Job Template to be used when quoting a customer, which may or may not be accepted.



A Job Template provides the framework for creating a Job should the Customer accept the quote.

If the Template Job has the Link Rental Cont. to JPL enabled or disabled, then when entering Rental Lines and Sales Lines, the Job Template No. defaults to the rental and sales lines and is mandatory.

If the rental and sale lines were populated before selecting the Job Template No. on the General tab, then the rental and sales line, Job No. field will be updated.

The selection of a Job Task No. is mandatory on the rental and sales lines.

Job No.

Provides the ability to select an open Job, which connects the Rental Quote to the Job.

When the selected Job has Link Rental Cont. to JPL enabled, then the Job No. defaults to the rental and sales lines and is mandatory. And the entry of a Job Task No. is mandatory on both rental and sales lines.

When the selected Job No. has Link Rental Cont. to JPL disabled, then the entry of the Job No. and Task No. on the rental and sales lines is optional. Thus, providing the ability to accumulate Job information in rentals without any transactions being posted to the Job.

Jobs menu option includes the following options:

Create Job

Is only selectable when a Job Template No. is populated on the General tab of the Rental Quote.

When the Job Template No. selected on the General tab has the field, Link Rental Cont. to JPL enabled, then when the Create Job is run a new Job is created with the Tasks setup on the Template Job and Job Planning Lines with a Type of Budget will be created from the rental and sales lines on the quote.

When the Job Template No. selected on the General tab has the field, Link Rental Cont. to JPL disabled, then a new Job is created with the Tasks setup on the Template Job, however, no Job Planning Lines will be created on that Job.

View Job

Is only selectable when the Template Job No or Job No. field is populated on the General tab. The Job card will be opened for the Template Job No. or Job No. on the General tab.

NOTE:

The Job. No. and Job Task No. fields will need to be added to the rental and sales lines using Personalize.

4.11.1.4. Rental Contract Enhancements

A Job No. field has been added to the Rental Contract, General tab, and is accessed by selecting Show more.

When populated connects the contract to the selected Job.

When the selected Job has Link Rental Cont. to JPL enabled, then the Job No. defaults to the rental and sales lines and is mandatory.

And the entry of a Job Task No. is mandatory on both rental and sales lines.

When the selected Job No. has Link Rental Cont. to JPL disabled, then the entry of the Job No. and Task No. on the rental and sales lines is optional. Thus, providing the ability to accumulate Job information in rentals without any transactions being posted to the Job.

When an organization is going to append Job Planning Lines from a Job to a Rental Contract, then the entry of the Job No. on the General Tab is mandatory as this connects the contract to the Job. Which then makes the contract available for selection, when appending planning lines to a contract.



NOTES:

- The Job. No. and Job Task No. fields will need to be added to the rental and sales lines using Personalize.
- The Job Planning Line No. field is available to add to the Sales Line on a contract.
- When Job Planning Lines are appended to the contract sales lines, then the Job No., Task No, and Job Planning Line No. fields are automatically populated. The Sales Lines appended from a Job cannot be edited.

4.11.2. Setups for Job Integration

4.11.2.1. Overview

The setups for integration to Jobs include:

- Jobs Setup
- Job card configuration

4.11.2.1.1. Jobs Setup

The following setups are common to both the Appending Job Planning Lines to Contracts and the Rentals to Jobs integration features, unless otherwise noted.

Click on **Jobs Setup**

General	
Automatic Update Jo...	<input type="checkbox"/>
Apply Usage Link by ...	<input checked="" type="checkbox"/>
Allow Budget/Billable ...	<input checked="" type="checkbox"/>
Default WIP Method	<input type="text"/>
Default WIP Posting ...	<input type="text" value="Per Job"/>
Default Job Posting G...	<input type="text"/>
Logo Position on Doc...	<input type="text" value="No Lo"/>
Link Rental Cont. to JPL	<input type="checkbox"/>
Update All Dimension...	<input type="checkbox"/>
Copy Global 1 to Rent...	<input type="checkbox"/>
Copy Global 2 to Rent...	<input type="checkbox"/>
Rental Create Job Dim.	<input type="checkbox"/>

Numbering	
-----------	--

The following fields require decisions and configuration on the Jobs Setup:

Link Rental Cont. to JPL

Specifies whether rental contracts are to be linked to Job Planning Lines. The setting will default to new Jobs and can be overridden on the Job Card.

- When enabled on a Job, and Job. No is entered on a contract, then when the contract is invoiced, Job Planning Lines with a Type of Billable are created from the rental and sales lines on a contract.
- When disabled on a Job, and the Job No. is on a contract, then when invoice the contract Job Planning Lines will not be created on the Job for the invoiced rental and sales lines.

NOTE:

The enabling of this field is required in order for Job Planning Lines to be created from Rental Quotes and Rental Contracts.

If the same contract has had Job Planning Lines appended to the Rental Contract Sales Lines, the appending process applies to those lines. The creation of Billable type planning lines does not occur for appended sales lines.

Update All Dimension on Rental docs.

Specifies whether all dimension codes and values on the job are to update the rental documents.

- When enabled, the Copy Global 1 and Copy Global 2 fields are automatically disabled and cannot be modified.



When enabled, then when from a Job run Create Contract from Job, where the Dimension Codes are the same as on the contract, then the Dimension Value is updated on the contract with the Job Dimension Value. If the Job contains a Dimension Code and Value that is not on the contract, then the contract is updated with the Dimension Code and Value.

When enabled and add a Job No. to the General tab on a Rental Contract or Quote, then where the Dimension Codes are the same as on the rental document, then the Dimension Value is updated on the contract with the Job Dimension Value. If the Job contains a Dimension Code and Value that is not on the contract, then the contract is updated with the Dimension Code and Value.

If no lines have been entered on the contract or quote, then the dimensions on the rental and sales lines populate as usual.

If lines have been entered on the contract or quote prior to selecting Job No. on header, then the contract/quote – Dimensions and the rental line and sales line dimensions are automatically updated.

Copy Global 1 to Rental docs.

Specifies whether the Global 1 Dimension and Value are to be copied from the Job to the rental documents.

- When enabled, then when from Job run Create Contract from Job, then the Global 1 Dimension Code and Value on the Job flows to the Contract - Dimensions.

When enabled, and then add Job No. to contract or quote header, then the Global 1 Dimension Code and Value flows to contract/quote – Dimensions, if different from the dimension value on the documents.

If no lines have been entered on the contract or quote, then the dimensions on the rental and sales lines populate as usual.

If lines have been entered on the contract or quote prior to selecting Job No. on header, then the contract/quote – Dimensions and the rental line and sales line dimensions are automatically updated.

Copy Global 2 to Rental docs.

Specifies whether the Global 2 Dimension and Value are to be copied from the Job to the rental documents.

- When enabled, then when from Job run Create Contract from Job, then the Global 2 Dimension Code and Value on the Job flows to the Contract - Dimensions.

- When enabled, and then add Job No. to contract or quote header, then the Global 2 Dimension Code and Value flows to contract/quote – Dimensions, if different from the dimension value on the documents.

- If no lines have been entered on the contract or quote, then the dimensions on the rental and sales lines populate as usual.

- If lines have been entered on the contract or quote prior to selecting Job No. on header, then the contract/quote – Dimensions and the rental line and sales line dimensions are automatically updated.

Rental Create Job. Dim.

Specifies whether the dimensions on a Rental Quote are to be copied to the new Job.

- When on a Rental Quote with a Job Template No. and either run Create Job or Make Contract, then the Dimensions on the Quote-Dimensions flows to the created Job – Dimensions and the Dimensions on the rental and sales lines flow to the created Task lines - Dimensions.

Apply Usage Link by Default and Allow Budget/Billable Lines Def

When the Link Rental Cont. to JPL field is enabled on the Jobs Setup, then the Apply Usage Link By Default and Allow Budget/Billable Lines Def fields are to be disabled.

NOTE:

It is mandatory that the Apply Usage Link field be disabled on the Job cards in order to automatically create the Job Planning Lines from the Rental Quote and when a Rental Contract is invoiced.

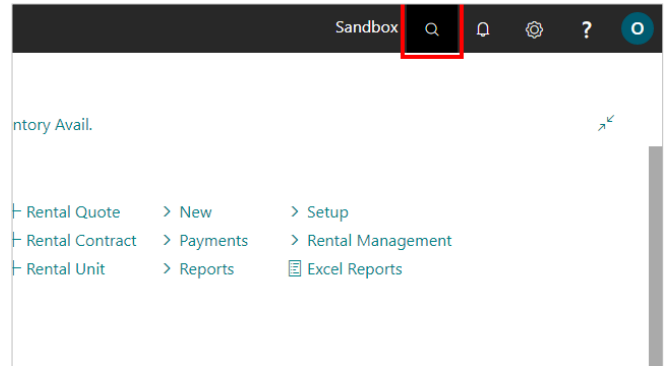
NOTE:

ODT Rentals Online Help

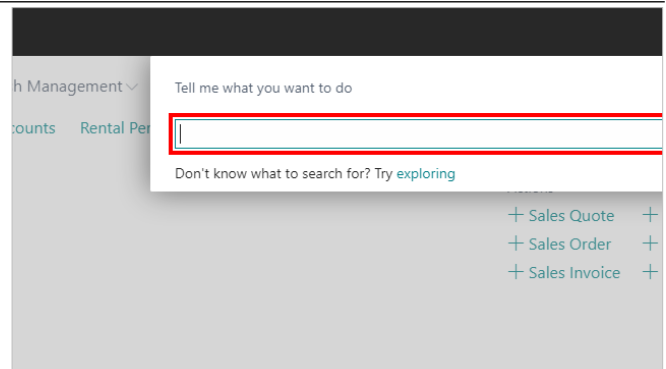
When a Job is configured with Link Rental Cont. to JPL, then Job Planning Lines can still be appended to contracts as long as the Type on the Job Planning Line is set to Billable.

The following demonstrates the configuration of Jobs Setup for when Rentals to Jobs Integration (Link Rental Cont. to JPL) is the normal process for an organization.

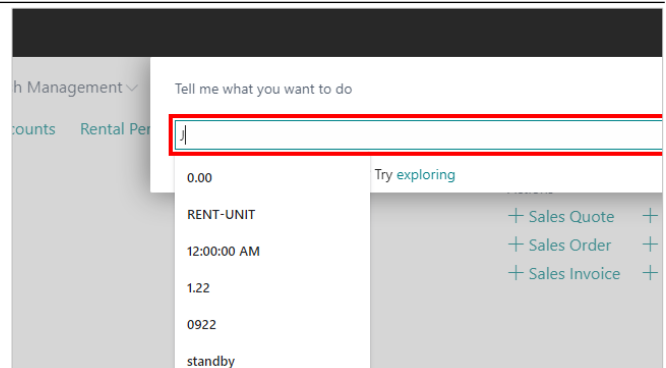
Click on the link **Search**



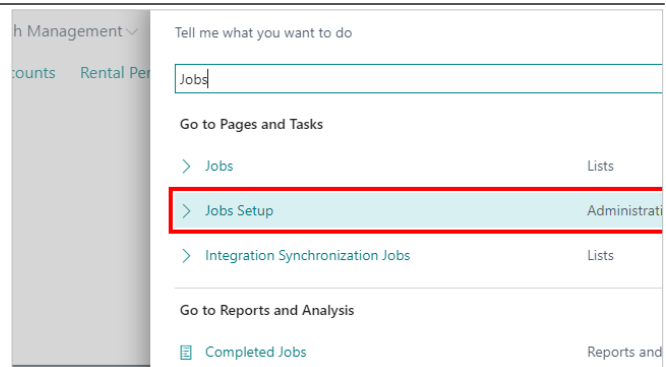
Click on the field **Tell me what you want to do**



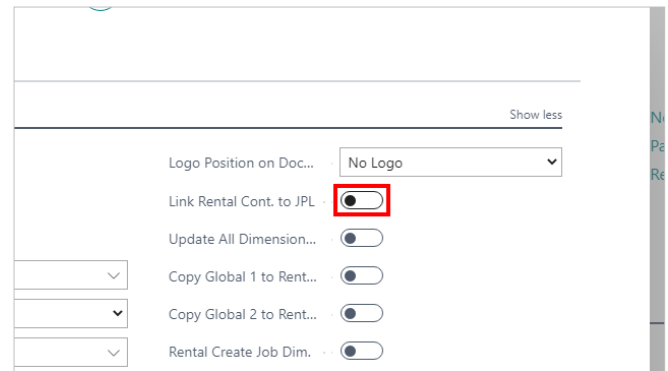
Enter **Tell me what you want to do**.



Click on **Jobs Setup Administration** ☐



Click on the toggle field **Link Rental Cont. to JPL**



Logo Position on Doc... No Logo

Link Rental Cont. to JPL ☒

Update All Dimension... ☐

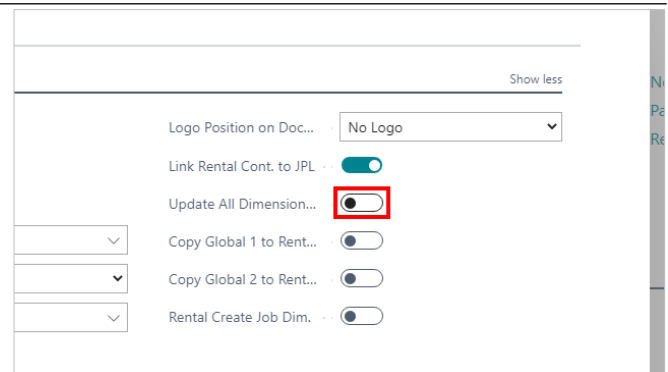
Copy Global 1 to Rent... ☐

Copy Global 2 to Rent... ☐

Rental Create Job Dim. ☐

Click on the toggle field **Update All Dimensions on Rental docs.**

Enable the Update All Dimension on Rental docs. if all the dimension codes and values are to flow to the rental documents from the Job.



Logo Position on Doc... No Logo

Link Rental Cont. to JPL ☒

Update All Dimension... ☒

Copy Global 1 to Rent... ☐

Copy Global 2 to Rent... ☐

Rental Create Job Dim. ☐

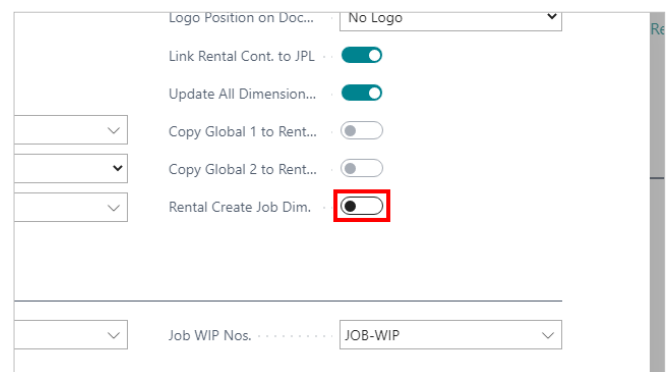
Should an organization require that only Dimension Code 1and/or 2 fields to flow from the Job to the rental documents, then do not enable the Update All Dimension on Rental docs. field.

Instead enable the Copy Global 1 and/or 2 fields as applicable to the organization.

Should an organization not want the Job Dimensions to flow to the rental documents, then do not enable any of the 3 dimension related fields.

Click on the toggle field **Rental Create Job Dim.**

Should an organization be creating Jobs from the Rental Quote or when run Make Contract and require the Dimensions to flow to the Job card and Task lines, then enable this field.



Logo Position on Doc... No Logo

Link Rental Cont. to JPL ☒

Update All Dimension... ☒

Copy Global 1 to Rent... ☐

Copy Global 2 to Rent... ☐

Rental Create Job Dim. ☒

Job WIP Nos. JOB-WIP

Click on the toggle field **Apply Usage Link by Default**

If the Link Rental Cont. to JPL is enabled as a default setting, then the Apply Usage Link by Default should be disabled as well.

The setting can be overridden on the Job card, if required.

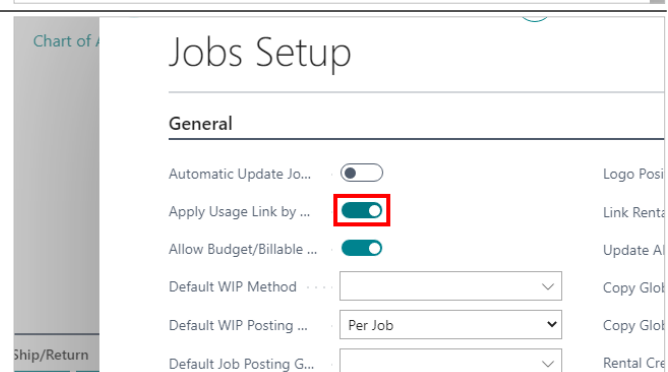


Chart of Accounts

Jobs Setup

General

Automatic Update Jo... ☐

Apply Usage Link by ... ☒

Allow Budget/Billable ... ☒

Default WIP Method ...

Default WIP Posting ... Per Job

Default Job Posting G...

Logo Posi

Link Renta

Update A

Copy Glo

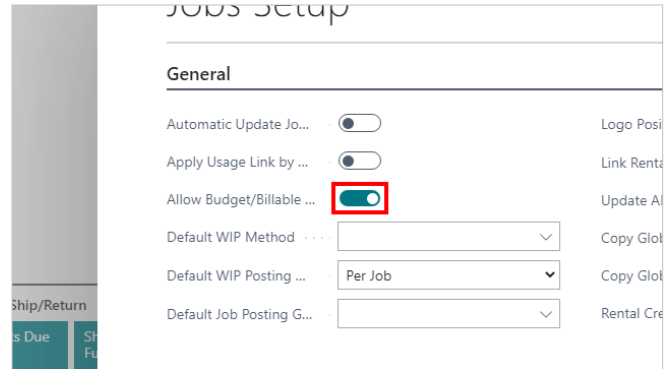
Copy Glo

Rental Cre

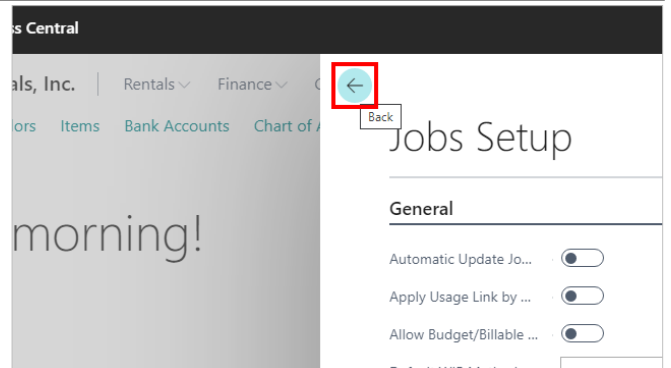
Click on the toggle field **Allow Budget/Billable Lines by Def**

If the Link Rental Cont. to JPL is enabled as a default setting, then the Allow Budget/Billable Lines by Def should be disabled as well.

The setting can be overridden on the Job card, if required.



Click on the back button



4.11.2.1.2.

Jobs Card Setup

The settings on the Jobs Setup default to the Job card when a new Job is created.

The settings on the following fields can be overridden on the Job card, if required.

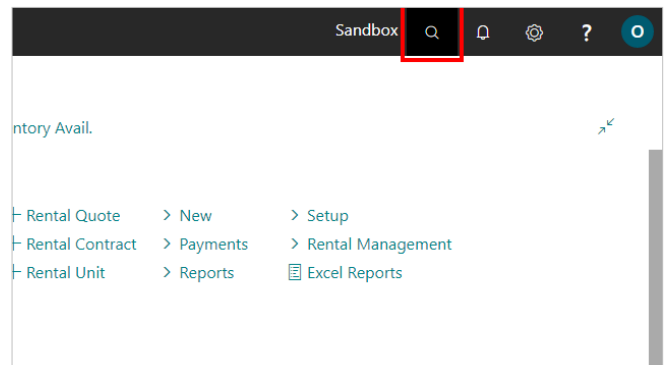
- Link Rental Cont. to JPL
- Apply Usage Link
- Allow Budget/Billable Lines

4.11.2.1.3.

How to Setup a Job for Rentals to Jobs Integration

The following example demonstrates the setup of a Job card when Job Planning lines are to be created from Rental Quotes (Type = Budget) and Rental Contracts (Type = Billable).

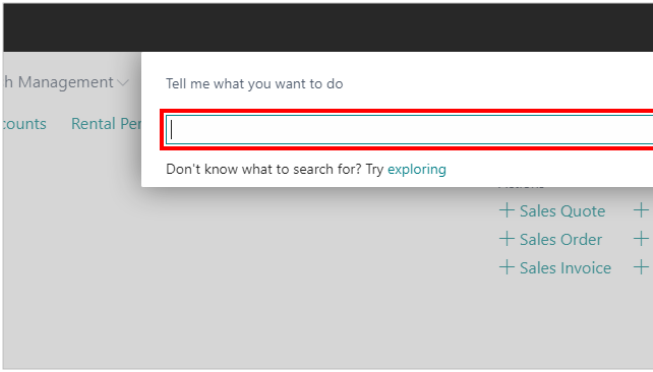
Click on the link **Search**



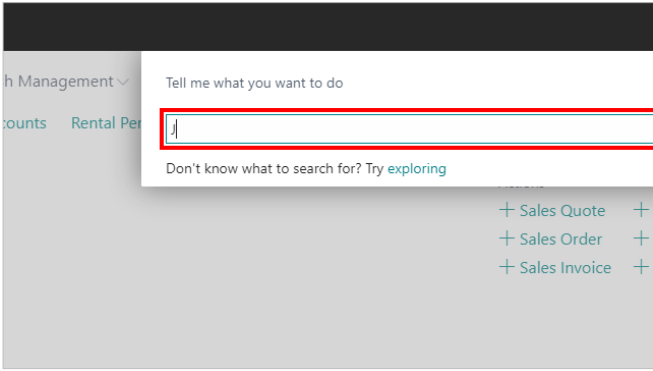


ODT Rentals Online Help

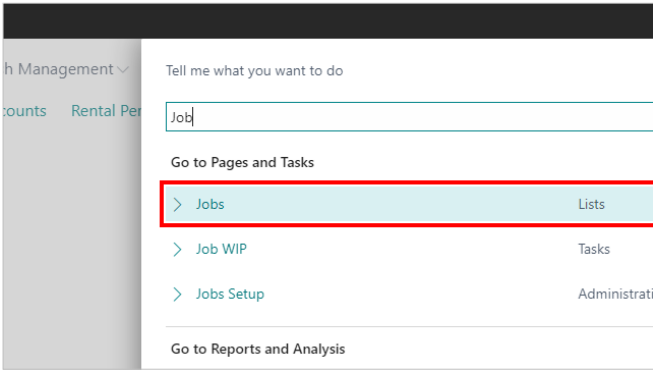
Click on the field **Tell me what you want to do**



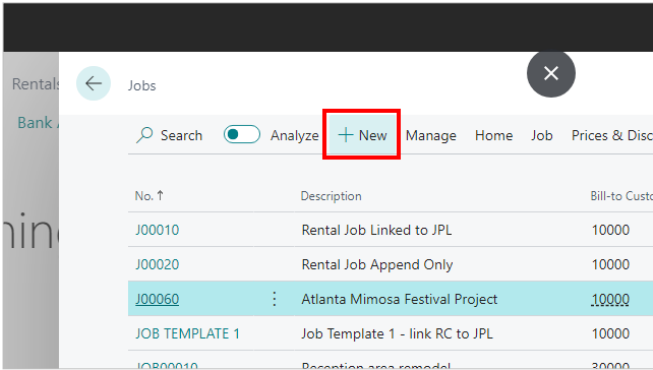
Enter **Tell me what you want to do**.



Click on **Jobs Lists** ☐



Click on the navigation menu item **New**





Click on the field **No.**

Either enter a Job No. if manually numbering allowed, press enter to have the Job No. automatically populated or if there are multiple look up to select the No. Series to be used.

The screenshot shows the 'Job Card' form with a sidebar on the left containing a '+ New' button and a list of items. The form has tabs for 'Process', 'Report', 'Prices & Discounts', 'WIP', 'Navigate', 'Job', and 'Print'. The 'General' tab is active. Fields include 'No.' (highlighted with a red box), 'Description', 'Bill-to Customer No.' (marked with a red asterisk), 'Bill-to Contact No.', and 'Name'. On the right, there are fields for 'Person Responsible', 'Blocked', 'Last Date Modified', and 'Project Manager'.

Click on the field **Description**

This screenshot is similar to the previous one, but the 'Description' field is now highlighted with a red box. The 'No.' field contains the value 'J00010'.

Enter **Description**.

Enter a short description to define the Job.

The 'Description' field is highlighted with a red box. The 'Bill-to Customer No.' field now contains the value '200.00'.

Click on the lookup button **Bill-to Customer No.**

The 'Bill-to Customer No.' field is highlighted with a red box. The dropdown menu is open, showing the selected option 'Rental Job Linked to JPL'. Other fields like 'No.' (J00010), 'Description' (Rental Job Linked to JPL), and 'Last Date Modified' (11/9/2021) are visible.



Click on the link in cell **No.** with the value **10000**

Click on the button **Show more**

Click on the link **Link Rental Cont. to JPL**

The setting to enabled on the field defaulted from the Jobs Setup and is what is required for this example so that Job Planning Lines will be created from the Rental and Sales Lines on the rental documents.

Click on the link **Transfer Sales Lines to Rental Contract**

If it is desirable that the Sales Lines on a Rental Quote linked to the Job are to be transferred to the Rental Contract when Make Contract is ran, then enable this field.

NOTE:

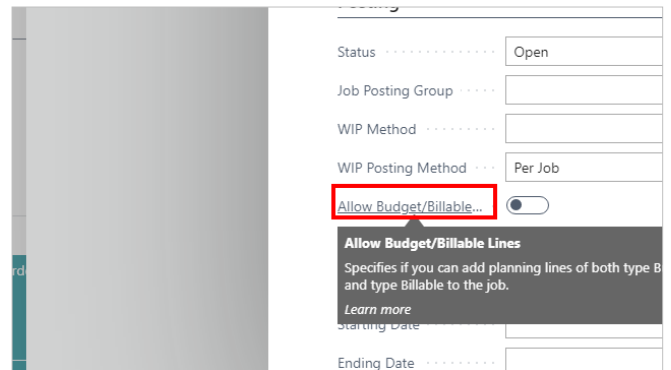
The Link Rental Cont. to JPL must be enabled to enable this field.

The Posting tab is to be configured as per standard Job Setup, with the exception of the Allow Budget/Billable Lines and Apply Usage Link fields as noted below.

Click on the link **Allow Budget/Billable Lines**

The setting on the field has defaulted from the Jobs Setup.

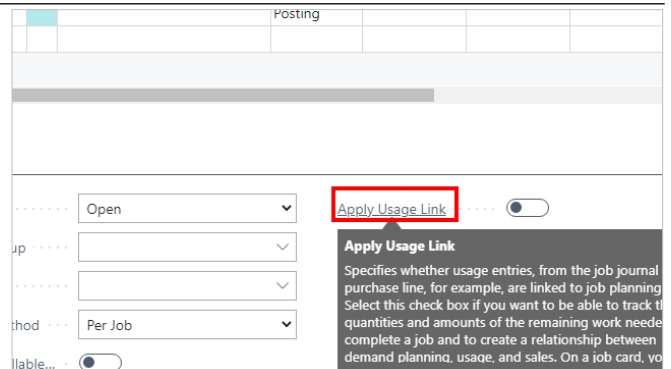
The Allow Budget/Billable Lines is to be disabled as when the Link Rental Cont. to JPL is enabled, the Job Planning Lines are either Budget or Billable. They cannot have the Type of Both Budget and Billable.



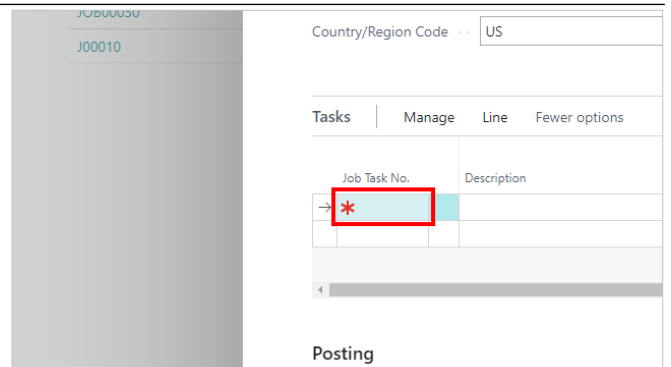
Click on the link **Apply Usage Link**

The setting on the field has defaulted from the Jobs Setup.

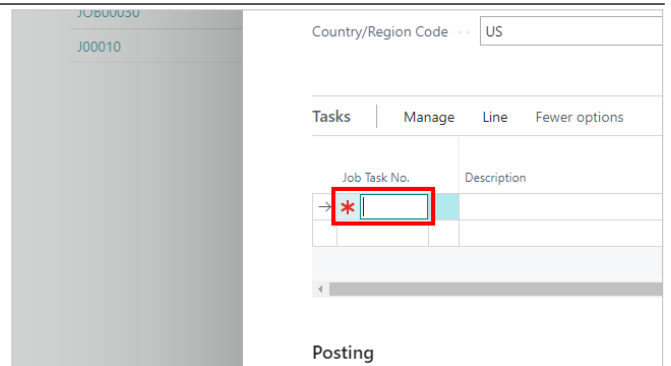
The Apply Usage Link must be disabled when the Link Rental Cont. to JPL is enabled. This is as the Job Planning Lines with Type Billable are automatically created and updated as invoiced when the connected Rental Contract is invoiced.



Click on the cell **Job Task No.**



Enter the text **Rental**.





ODT Rentals Online Help

Click on the cell **Description**

Country/Region Code : US

Tasks	Manage	Line	Fewer options
Job Task No.	Description	Job Task Type	Sta
→ * Rental		Posting	

Posting

Enter the text **Rentals**.

Country/Region Code : US

Tasks	Manage	Line	Fewer options
Job Task No.	Description	Job Task Type	Sta
→ RENTAL		Posting	

Posting

Click on **Job Task No.**

J00010

Tasks	Manage	Line	Fewer options
Job Task No.	Description		
→ RENTAL	Rentals		

Posting

Enter the text **Service**.

J00010

Tasks	Manage	Line	Fewer options
Job Task No.	Description		
→ * RENTAL	Rentals		

Posting



Click on the cell **Description**

Tasks

Manage

Line

Fewer options

Job Task No.	Description	Job Task Type	Sta
RENTAL	Rentals	Posting	—
→ * Service		Posting	—

Posting

Status Open

Enter the text **Materials**.

Tasks

Manage

Line

Fewer options

Job Task No.	Description	Job Task Type	Sta
RENTAL	Rentals	Posting	—
→ SERVICE		Posting	—

Posting

Status Open

Click on **Job Task No.**

Tasks

Manage

Line

Fewer options

Job Task No.	Description
RENTAL	Rentals
→ SERVICE	Materials

Posting

Status Open

Enter the text **Labour**.

Tasks

Manage

Line

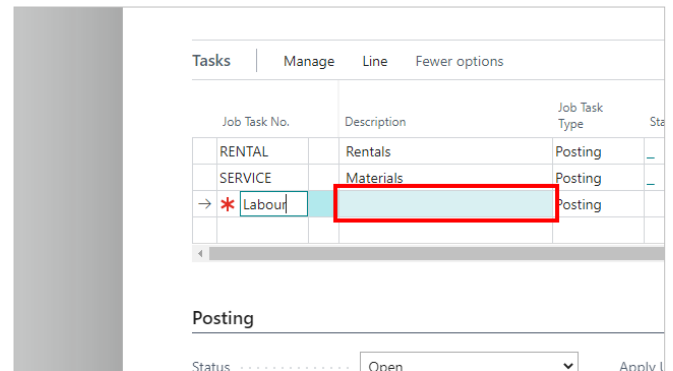
Fewer options

Job Task No.	Description
RENTAL	Rentals
→ *	Materials

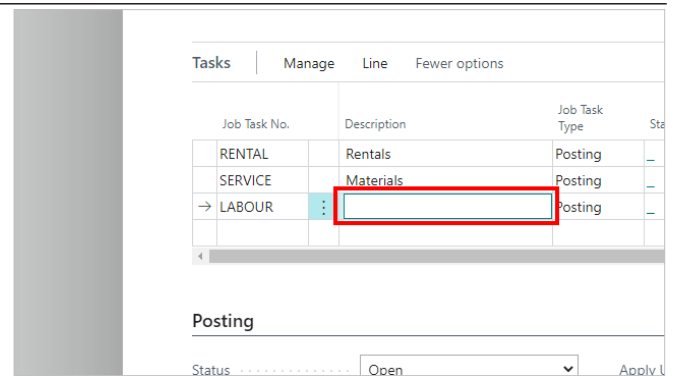
Posting

Status Open

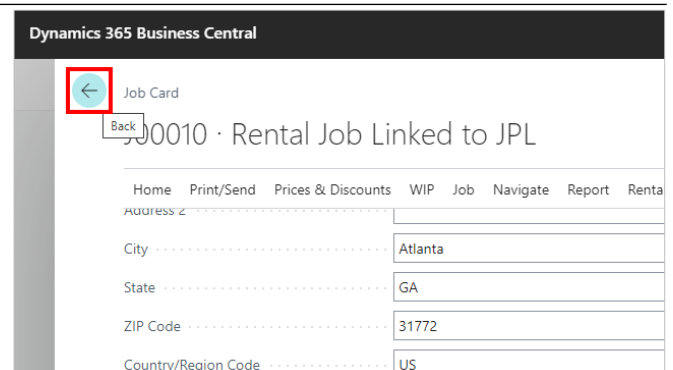
Click on the cell **Description**



Enter the text **Labour**.



Click on the back button



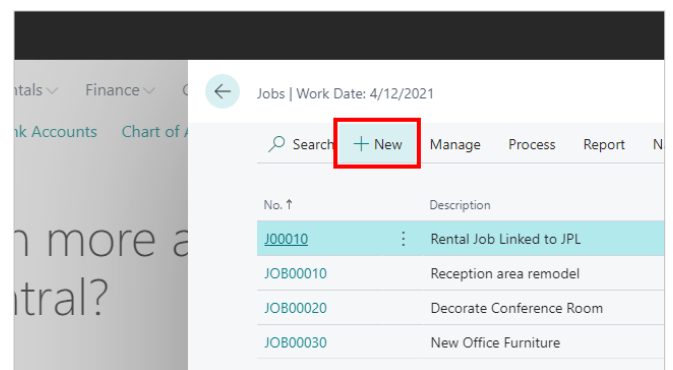
4.11.2.1.4.

Integration

How to Setup a Template Job for Rentals to Jobs

The following example demonstrates the setup of a Job card as a Template Job, when Job Planning lines are to be created from Rental Quotes with the Type set as Budget.

Click on the navigation menu item **New**





Click on the field **No.**

Either enter a Job No. if manually numbering allowed, press enter to have the Job No. automatically populated or if there are multiple look up to select the No. Series to be used.

The screenshot shows the 'Job Card' form with the 'General' tab selected. The 'No.' field is highlighted with a red box. The form includes fields for Description, Bill-to Customer No., Bill-to Contact No., Name, and Address. The 'Bill-to Customer No.' field has a red asterisk next to it. The 'No.' field has a dropdown arrow next to it.

Enter the text **Template 1.**

The screenshot shows the 'Job Card' form with the 'General' tab selected. The 'No.' field is highlighted with a red box. The form includes fields for Description, Bill-to Customer No., Bill-to Contact No., Name, and Address. The 'Bill-to Customer No.' field has a red asterisk next to it. The 'No.' field has a dropdown arrow next to it.

Click on the field **Description**

The screenshot shows the 'Job Card' form with the 'General' tab selected. The 'Description' field is highlighted with a red box. The form includes fields for No., Bill-to Customer No., Bill-to Contact No., Name, and Address. The 'Bill-to Customer No.' field has a red asterisk next to it. The 'No.' field has a dropdown arrow next to it.

Enter **Description.**

Enter a short description indicative of the Template Job being created.

The screenshot shows the 'Job Card' form with the 'General' tab selected. The 'Description' field is highlighted with a red box. The form includes fields for No., Bill-to Customer No., Bill-to Contact No., Name, and Address. The 'Bill-to Customer No.' field has a red asterisk next to it. The 'No.' field has a dropdown arrow next to it.



Click on the lookup button **Bill-to Customer No.**

The screenshot shows the 'Bill-to Customer No.' field with a red box around the lookup button. The interface includes a top navigation bar with links like 'Report', 'Prices & Discounts', 'WIP', 'Navigate', 'Job', 'Print/Send', 'Rentals', and 'Ac'. Below the navigation bar, there are several input fields for 'Customer No.', 'Contact No.', 'Address', 'City', 'State', 'ZIP Code', 'Phone No.', 'Mobile Phone No.', 'Email', 'Search Description', 'Person Responsible', and 'Blocked'.

Click on the link in cell **No.** with the value **10000**

The screenshot shows the 'No.' field with the value '10000' highlighted by a red box. The interface includes a top navigation bar with links like 'Report', 'Prices & Discounts', 'WIP', 'Navigate', 'Job', 'Print/Send', 'Rentals', and 'Ac'. Below the navigation bar, there are several input fields for 'Customer No.', 'Contact No.', 'Address', 'City', 'State', 'ZIP Code', 'Phone No.', 'Mobile Phone No.', 'Email', 'Search Description', 'Person Responsible', and 'Blocked'.

Click on the link **Link Rental Cont. to JPL**

The setting to enabled on the field defaulted from the Jobs Setup and is what is required for this example so that Budget type Job Planning Lines will be created from the Rental Quote, Rental and Sales Lines.

The screenshot shows the 'Link Rental Cont. to JPL' toggle switch highlighted by a red box. The interface includes a top navigation bar with links like 'Report', 'Prices & Discounts', 'WIP', 'Navigate', 'Job', 'Print/Send', 'Rentals', and 'Ac'. Below the navigation bar, there are several input fields for 'Customer No.', 'Contact No.', 'Address', 'City', 'State', 'ZIP Code', 'Phone No.', 'Mobile Phone No.', 'Email', 'Search Description', 'Person Responsible', and 'Blocked'.

Click on the link **Transfer Sales Lines to Rental Contract**

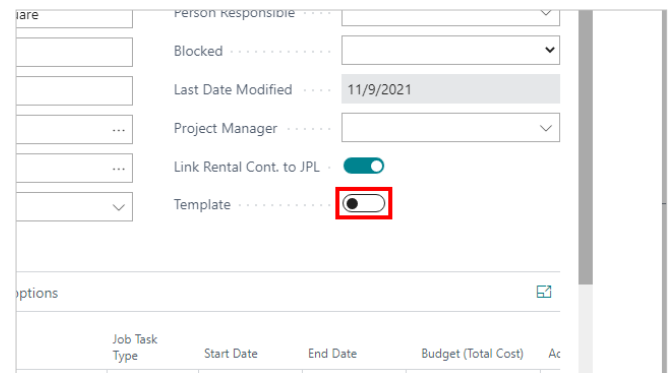
If it is desirable that the Sales Lines on a Rental Quote linked to the Job are to be transferred to the Rental Contract when Make Contract is ran, then enable this field.

NOTE:

The Link Rental Cont. to JPL must be enabled to enable this field.

The screenshot shows the 'Transfer Sales Lines to Rental Contract' toggle switch highlighted by a red box. The interface includes a top navigation bar with links like 'Report', 'Prices & Discounts', 'WIP', 'Navigate', 'Job', 'Print/Send', 'Rentals', and 'Ac'. Below the navigation bar, there are several input fields for 'Customer No.', 'Contact No.', 'Address', 'City', 'State', 'ZIP Code', 'Phone No.', 'Mobile Phone No.', 'Email', 'Search Description', 'Person Responsible', and 'Blocked'.

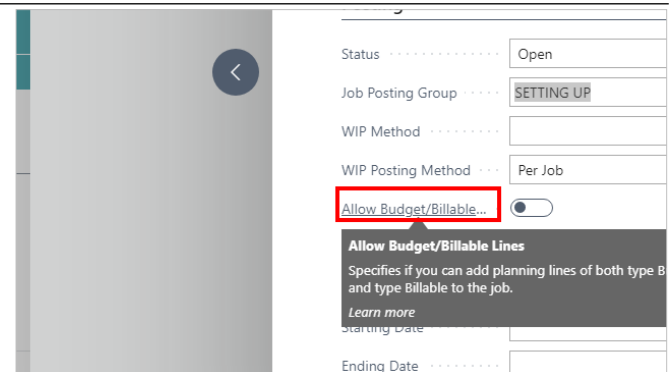
Click on the toggle field **Template**



Click on the link **Allow Budget/Billable Lines**

The setting on the field has defaulted from the Jobs Setup.

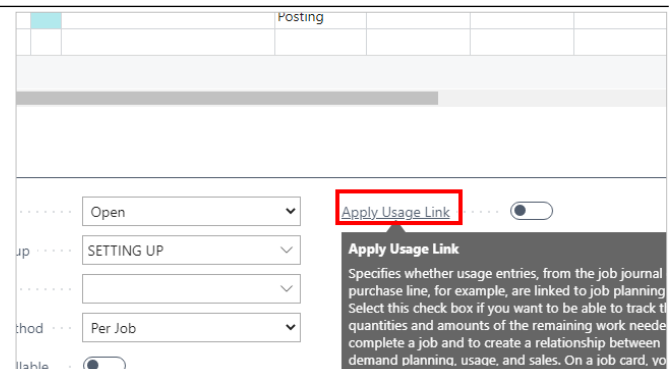
The Allow Budget/Billable Lines is to be disabled as when the Link Rental Cont. to JPL is enabled, the Job Planning Lines are either Budget or Billable. They cannot have the Type of Both Budget and Billable.



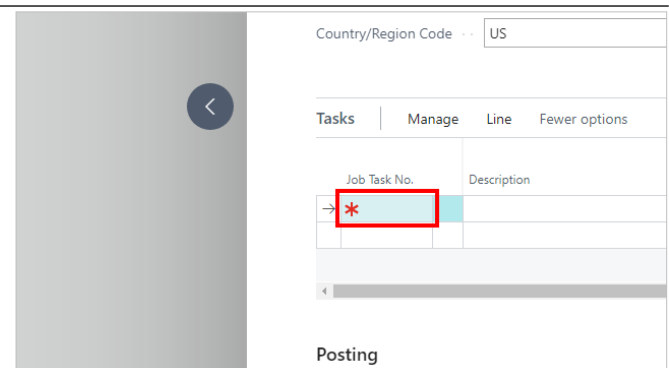
Click on the link **Apply Usage Link**

The setting on the field has defaulted from the Jobs Setup.

The Apply Usage Link must be disabled when the Link Rental Cont. to JPL is enabled. This is as the Job Planning Lines with Type Billable are automatically created and updated as invoiced when the connected Rental Contract is invoiced.



Click on the cell **Job Task No.**





Enter the text **Rental**.

The screenshot shows the 'Job Task No.' field in the 'Tasks' tab, which is highlighted with a red box. The 'Description' field is also visible but not highlighted. The 'Job Task Type' is set to 'Posting'.

Click on the cell **Description**

The screenshot shows the 'Description' field in the 'Tasks' tab, which is highlighted with a red box. The 'Job Task No.' field is now filled with 'Rental'. The 'Job Task Type' is set to 'Posting'.

Enter the text **Rentals**.

The screenshot shows the 'Job Task No.' field in the 'Tasks' tab, which is highlighted with a red box. The 'Description' field is also visible but not highlighted. The 'Job Task Type' is set to 'Posting'.

Click on **Job Task No.**

The screenshot shows the 'Job Task No.' field in the 'Tasks' tab, which is highlighted with a red box. The 'Description' field is also visible but not highlighted. The 'Job Task Type' is set to 'Posting'.



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Enter the text **Service**.

<

Tasks | Manage | Line | Fewer options

Job Task No.	Description
RENTAL	Rentals
→ *	

Posting

Click on the cell **Description**

<

Tasks | Manage | Line | Fewer options

Job Task No.	Description	Job Task Type	Sta
RENTAL	Rentals	Posting	—
→ * Service		Posting	

Posting

Enter the text **Materials**.

ZIP Code 31772 Project Manager

City Link Rental Cont

Country/Region Code ... US ... Template

<

Tasks | Manage | Line | Fewer options

Job Task No.	Description	Job Task Type	Start Date
RENTAL	Rentals	Posting	—
→ SERVICE		Posting	—

Click on **Job Task No.**

<

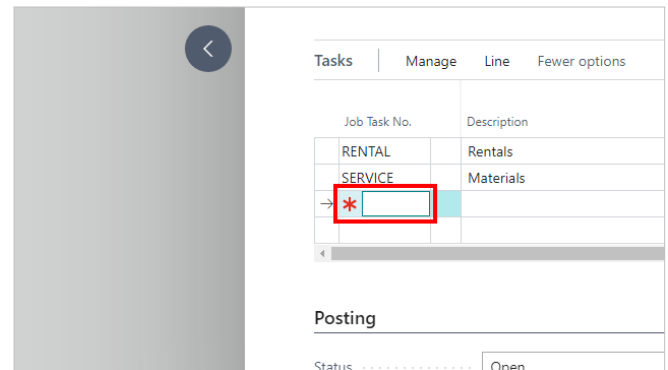
Tasks | Manage | Line | Fewer options

Job Task No.	Description
RENTAL	Rentals
→ SERVICE	Materials

Posting

Status Open

Enter the text **Labour**.

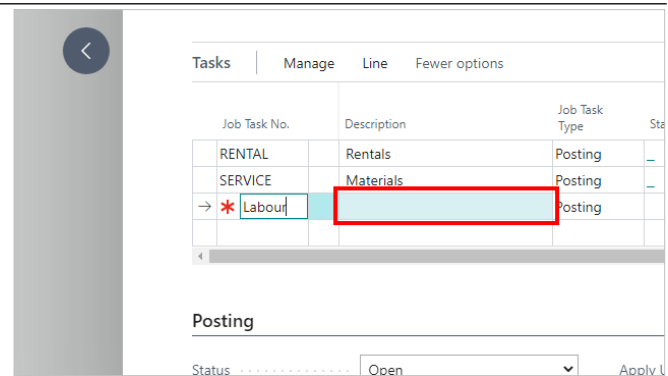


Job Task No.	Description
RENTAL	Rentals
SERVICE	Materials

Posting

Status Open

Click on the cell **Description**

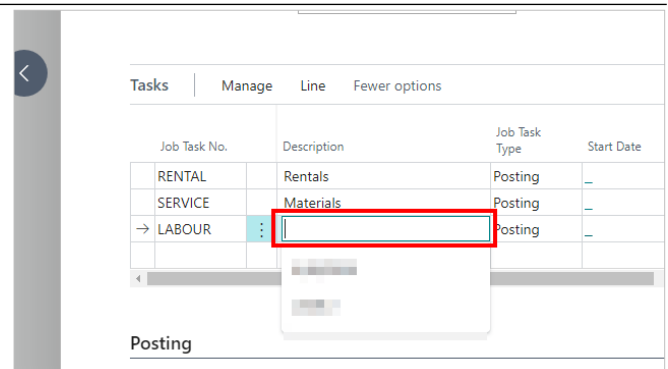


Job Task No.	Description	Job Task Type	Status
RENTAL	Rentals	Posting	—
SERVICE	Materials	Posting	—
→ * Labour		Posting	—

Posting

Status Open Apply

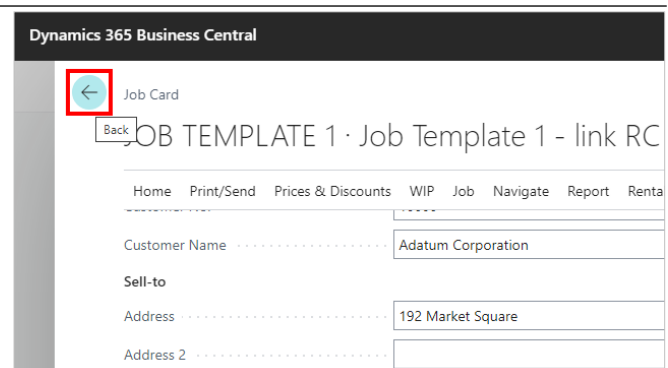
Enter the text **Labour**.



Job Task No.	Description	Job Task Type	Start Date
RENTAL	Rentals	Posting	—
SERVICE	Materials	Posting	—
→ LABOUR		Posting	—

Posting

Click on the back button



Dynamics 365 Business Central

Job Card

Back JOB TEMPLATE 1 · Job Template 1 - link RC

Home Print/Send Prices & Discounts WIP Job Navigate Report Rental

Customer Name Adatum Corporation

Sell-to

Address 192 Market Square

Address 2

4.11.2.1.5.

How to Setup a Job for Appending to Rental Contracts

The following example demonstrates the setup of a Job card when Job Planning lines are only going to be appended to a Rental Contract and only invoicing transactions from the appended sales lines are to update the Job.



Click on the navigation menu item **New**

The screenshot shows the top navigation bar of the ODT Rentals Online Help interface. The 'New' button is highlighted with a red box. Below the navigation bar, there is a table with columns 'No.' and 'Description'. The table contains the following data:

No.	Description
J00010	Rental Job Linked to JPL
JOB00010	Reception area remodel
JOB00020	Decorate Conference Room
JOB00030	New Office Furniture

Click on the field **No.**

Either enter a Job No. if manually numbering allowed, press enter to have the Job No. automatically populated or if there are multiple look up to select the No. Series to be used.

The screenshot shows the 'Job Card' form. The 'No.' field is highlighted with a red box. The form includes the following fields:

- No. (highlighted)
- Description
- Bill-to Customer No. *
- Bill-to Contact No.
- Name
- Contact
- Phone No.
- Mobile Ph
- Email
- Search De

Click on the field **Description**

The screenshot shows the 'Job Card' form. The 'Description' field is highlighted with a red box. The form includes the following fields:

- No. (J00020)
- Description (highlighted)
- Bill-to Customer No. (10000)
- Bill-to Contact No. (CT000001)
- Name (Adatum Corporation)
- Address (192 Market Square)
- Contact
- Phone No.
- Mobile Ph
- Email
- Search De
- Person Res

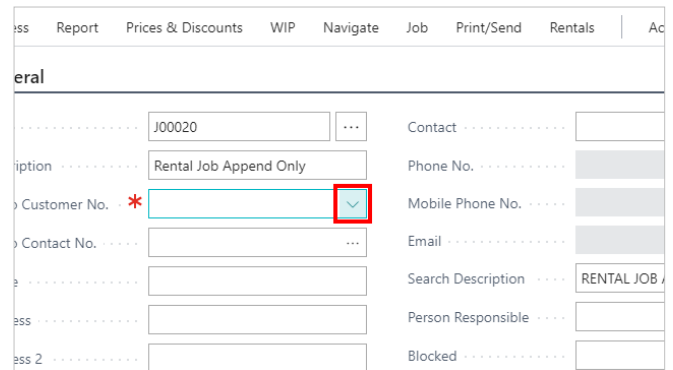
Enter **Description**.

Enter a short description to define the Job.

The screenshot shows the 'Job Card' form. The 'Description' field is highlighted with a red box. The form includes the following fields:

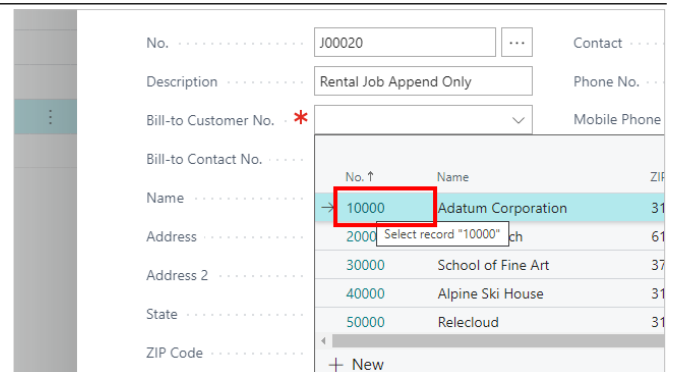
- No. (J00020)
- Description (highlighted)
- Bill-to Customer No. *
- Bill-to Contact No.
- Name
- Address
- Contact
- Phone No.
- Mobile Ph
- Email
- Search De
- Person Res

Click on the lookup button **Bill-to Customer No.**



The screenshot shows the 'Bill-to Customer No.' field with a red box around the lookup button. The field is labeled 'Bill-to Customer No. *' and has a dropdown arrow next to it. The field is currently empty.

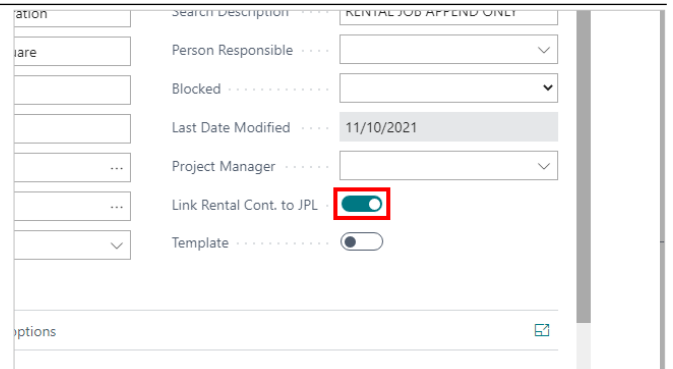
Click on the link in cell **No.** with the value **10000**



The screenshot shows the 'Bill-to Customer No.' field with a red box around the link '10000'. The field is labeled 'Bill-to Customer No. *' and has a dropdown arrow next to it. The field is currently empty.

Click on the toggle field **Link Rental Cont. to JPL**

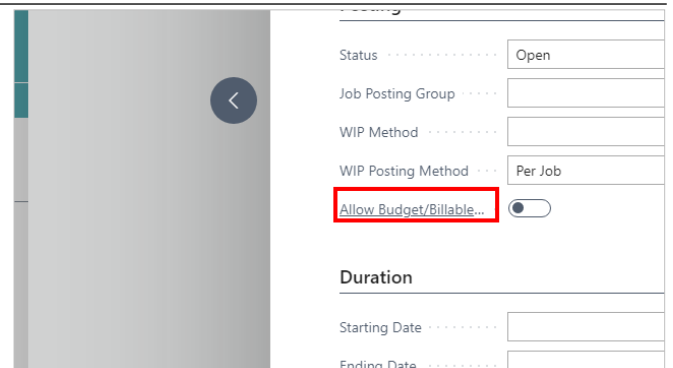
When an organization only wants to append Job Planning Lines to the Rental Contract Sales Lines and does not want other transactions to post from the Rental Lines or other entered Sales back to the Job, then this field must be disabled.



The screenshot shows the 'Link Rental Cont. to JPL' field with a red box around the toggle switch. The field is labeled 'Link Rental Cont. to JPL' and has a toggle switch next to it. The toggle switch is currently turned on.

Click on the link **Allow Budget/Billable Lines**

As the Link Rental Cont. to JPL field is disabled, then an organization can choose to enable this field if the Job Planning Lines Type field is to be set to Both Budget and Billable.



The screenshot shows the 'Allow Budget/Billable Lines' field with a red box around the toggle switch. The field is labeled 'Allow Budget/Billable...' and has a toggle switch next to it. The toggle switch is currently turned on.



Click on the link **Apply Usage Link**

The Apply Usage Line field can be enabled or left as disabled.
When this field is enabled and job planning lines with items are appended to contracts, then the Usage has to be processed from the Job before the Rental Contract can be invoiced.

The screenshot shows a 'Posting' form with several fields. A red box highlights the 'Apply Usage Link' field, which is currently disabled (indicated by a grey toggle switch). Other visible fields include 'Open' (dropdown), '% Completed' (text), '% Invoiced' (text), 'Per Job' (dropdown), and '% of Overdue Plannin...' (text).

Click on the cell **Job Task No.**

The screenshot shows the 'Posting' form with a red box highlighting the 'Job Task No.' field, which contains an asterisk (*). The 'Name' field is set to 'Adatum Corporation'. The 'Tasks' tab is selected, and the 'Job Task No.' field is highlighted in blue.

Enter the text **Service**.

The screenshot shows the 'Posting' form with the 'Job Task No.' field containing the text 'Service'. The 'Name' field is set to 'Adatum Corporation'. The 'Tasks' tab is selected, and the 'Job Task No.' field is highlighted in blue.

Click on the cell **Description**

The screenshot shows the 'Posting' form with the 'Job Task No.' field containing the text 'Service'. The 'Name' field is set to 'Adatum Corporation'. The 'Tasks' tab is selected, and the 'Description' field is highlighted in blue.

Enter the text **Materials**.

Name Adatum Corporation

Tasks | Manage | Line | Fewer options

Job Task No.	Description	Job Task Type	Start Date	End
→ SERVICE		Posting		

Posting

Click on **Job Task No.**

No. ↑

J00010

JOB00010

JOB00020

JOB00030

TEMPLATE 1

J00020

Process | Report | Prices & Discounts | WIP | N

Tasks | Manage | Line | Fewer options

Job Task No.	Description
→ SERVICE	Materials

Posting

Enter the text **Labour**.

No. ↑

J00010

JOB00010

JOB00020

JOB00030

TEMPLATE 1

J00020

Process | Report | Prices & Discounts | WIP | N

Tasks | Manage | Line | Fewer options

Job Task No.	Description
→ SERVICE	Materials
→ *	

Posting

Click on the cell **Description**

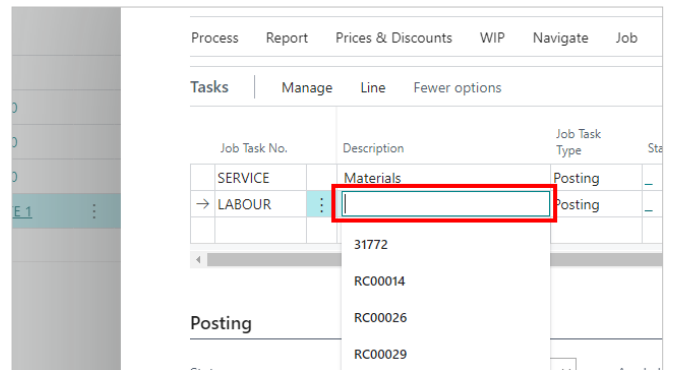
Process | Report | Prices & Discounts | WIP | Navigate | Job

Tasks | Manage | Line | Fewer options

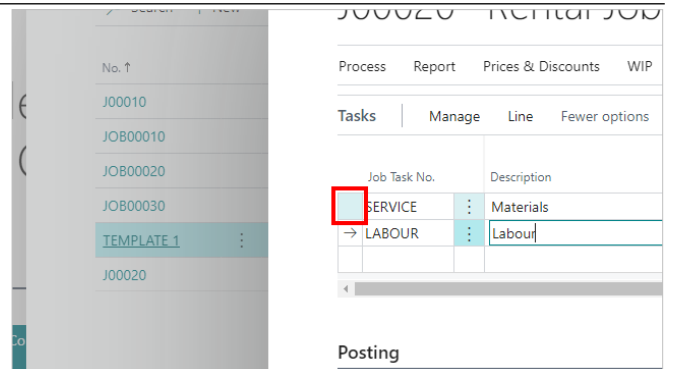
Job Task No.	Description	Job Task Type	Sta
SERVICE	Materials	Posting	
→ * Labour		Posting	

Posting

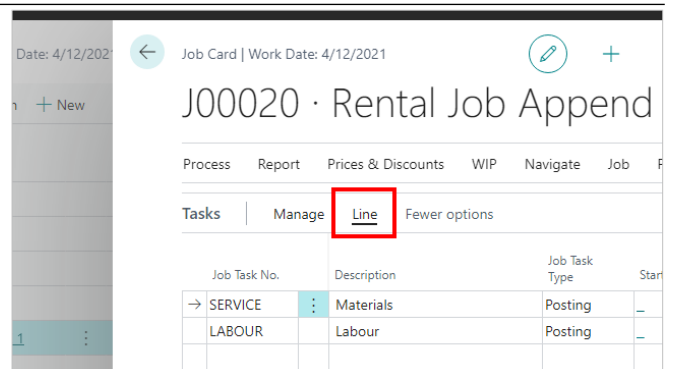
Enter the text **Labour**.



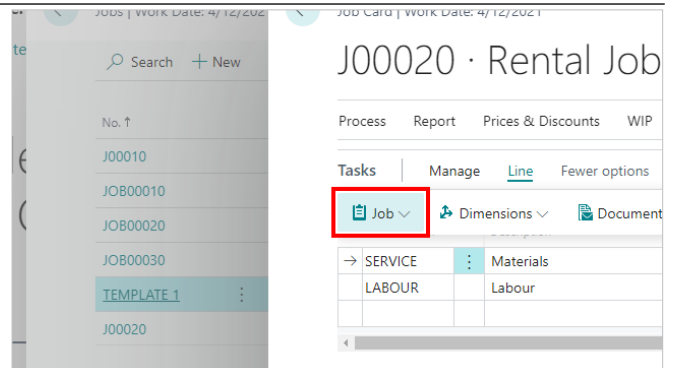
Click on **Job Task No. = SERVICE**, **Job Task Type = 0**, **Budget (Total Cost) = 0**



Click on the navigation menu item popup **Line**



Click on the link **Job**





Click on the navigation menu item **Job Planning Lines**

The screenshot shows the 'Job Planning Lines' navigation menu. The 'Job Planning Lines' option is highlighted with a red box. The menu also includes options for 'Job', 'Dimensions', and 'Document'.

Click on the item **Both Budget and Billable** in the list

The screenshot shows the 'Job Planning Lines' list. The 'Both Budget and Billable' option is highlighted with a red box. The list includes columns for 'Job Task No.', 'Line Type', 'Planning Date', 'Planned Delivery Date', and 'Document No.'.

Click on the cell **Type** with the value **Resource Item G/L Account Text**

The screenshot shows the 'Job Planning Lines' list. The 'Type' cell with the value 'Resource' is highlighted with a red box. The list includes columns for 'Planning Date', 'Planned Delivery Date', 'Document No.', 'Type', 'No.', and 'Description'.

Click on the item **Item** in the list

The screenshot shows the 'Job Planning Lines' list. The 'Item' option in the dropdown menu is highlighted with a red box. The list includes columns for 'Planning Date', 'Planned Delivery Date', 'Document No.', 'Type', 'No.', and 'Description'.



Click on the cell **No.**

Edit List							Delete	Process	Report	Open in Excel	Actions	Related	Report
ing	Planned Delivery Date	Document No.	Type	No.	Description								
2021	4/12/2021		Item										

Click on the link in cell **No.** with the value **1005**

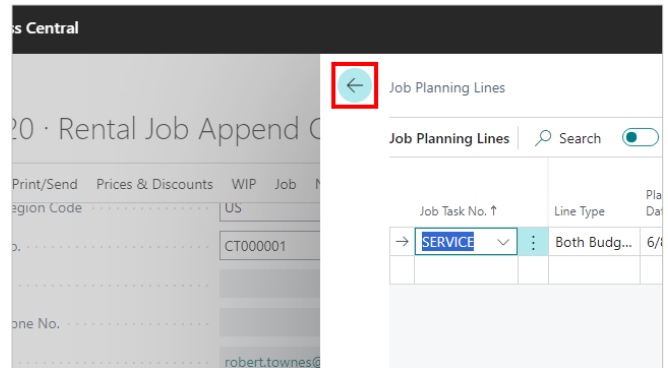
List	Delete	Process	Report	Open in Excel	Actions	Related	Reports
Planned Delivery Date	Document No.	Type	No.	Description			
4/12/2021		Item	<div>▼</div>				
				rental man			
				1005	Generator Lubricant		PC
				1006	Series 10 Sucker Rod Overshot		PC
				1007	Basket Grapple		PC
				1008	Spiral Grapple		PC
				1896-S	ATHENS Desk		PC
				+ New			

Click on the cell **Quantity** with the value **0**

Enter the text **2**.

Open in Excel | Actions | Related | Reports | Fewer options				
No.	Description	Quantity	Unit Cost	Total Cost
1005	Generator Lubricant	<div><div></div><div></div></div>	7.50	0.00

Click on the back button

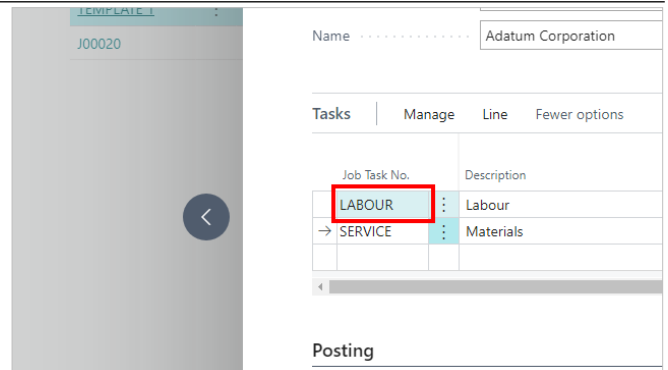


Job Planning Lines

Job Planning Lines Search

Job Task No. ↑	Line Type	Pla	Da
→ SERVICE	Both Budg...	6/7	

Click on the cell **Job Task No.** with the value **LABOUR**



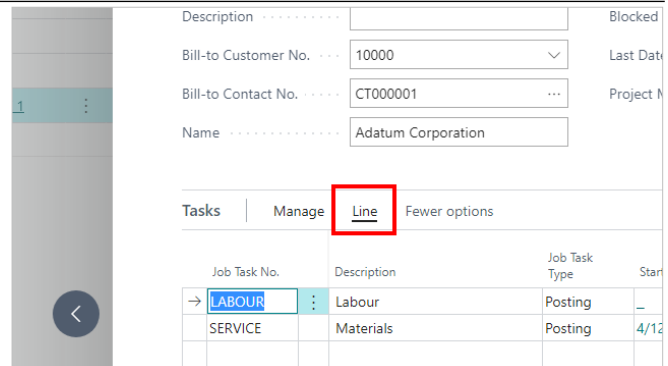
Name Adatum Corporation

Tasks Manage Line Fewer options

Job Task No.	Description
LABOUR	Labour
→ SERVICE	Materials

Posting

Click on the navigation menu item popup **Line**



Description Bill-to Customer No. 10000 Last Date

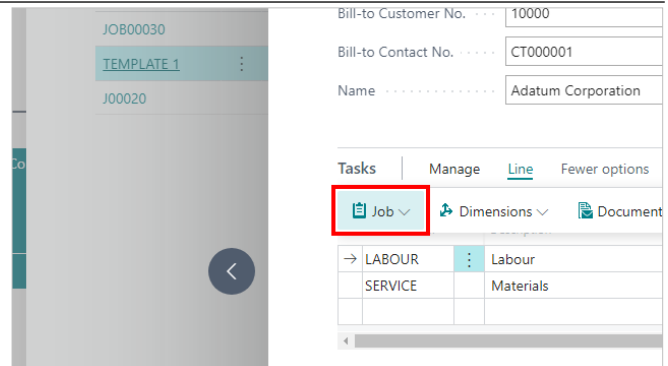
Bill-to Contact No. CT000001 Project M

Name Adatum Corporation

Tasks Manage **Line** Fewer options

Job Task No.	Description	Job Task Type	Start
→ LABOUR	Labour	Posting	
SERVICE	Materials	Posting	4/12

Click on the link **Job**



Bill-to Customer No. 10000

Bill-to Contact No. CT000001

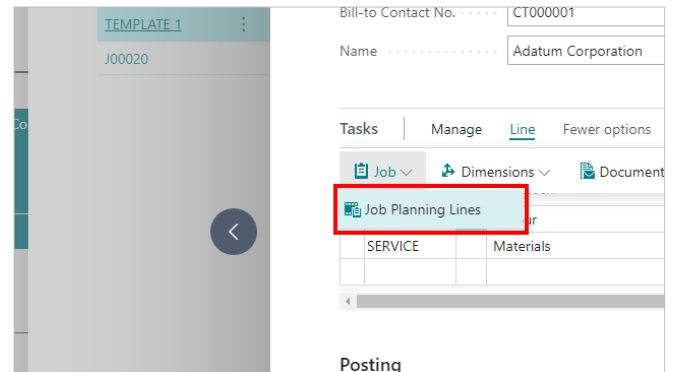
Name Adatum Corporation

Tasks Manage Line Fewer options

Job Dimensions Document

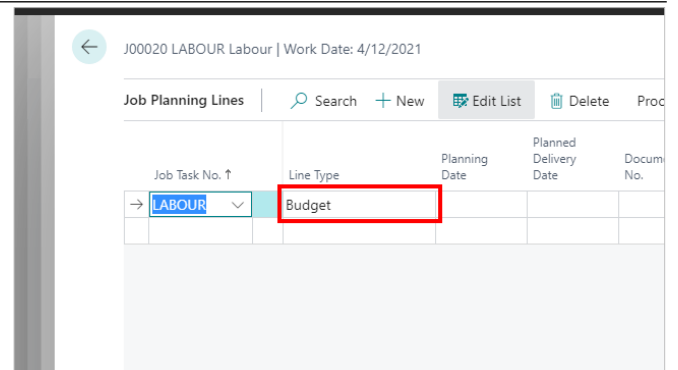
→ LABOUR	Labour
SERVICE	Materials

Click on the navigation menu item **Job Planning Lines**



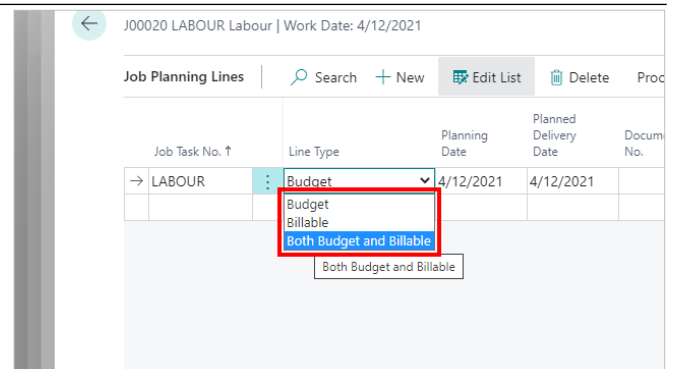
The screenshot shows the 'Job Planning Lines' option highlighted in the navigation menu. The menu is located on the left side of the screen, and the 'Job Planning Lines' option is the second item from the top. The right side of the screen shows the 'Bill-to Contact No.' and 'Name' fields, both containing 'CT000001' and 'Adatum Corporation' respectively. Below these fields, there are tabs for 'Tasks', 'Manage', 'Line', and 'Fewer options'. The 'Line' tab is selected, and it shows a table with columns for 'SERVICE' and 'Materials'. The 'Posting' button is visible at the bottom right.

Click on the cell **Line Type** with the value **Budget**
Billable Both Budget and Billable



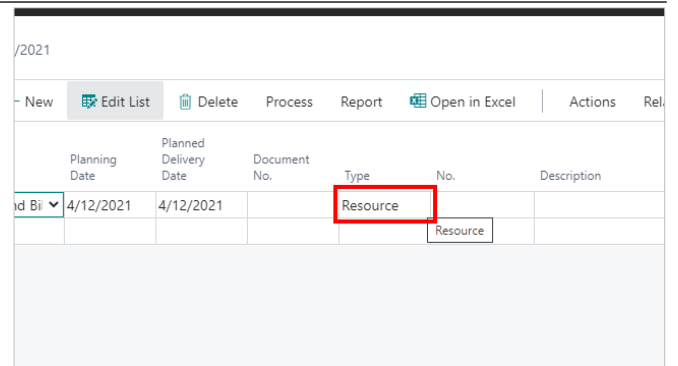
The screenshot shows the 'Job Planning Lines' table. The table has columns for 'Job Task No. ↑', 'Line Type', 'Planning Date', 'Planned Delivery Date', and 'Document No.'. The 'Line Type' column is highlighted, and the value 'Budget' is selected. The 'Job Task No.' is 'LABOUR'. The 'Planning Date' is '4/12/2021' and the 'Planned Delivery Date' is '4/12/2021'.

Click on the item **Both Budget and Billable** in the list



The screenshot shows the 'Job Planning Lines' table with a dropdown menu open for the 'Line Type' column. The dropdown menu shows three options: 'Budget', 'Billable', and 'Both Budget and Billable'. The 'Both Budget and Billable' option is selected. The 'Job Task No.' is 'LABOUR', the 'Planning Date' is '4/12/2021', and the 'Planned Delivery Date' is '4/12/2021'.

Click on the cell **Type** with the value **Resource Item**
G/L Account Text



The screenshot shows the 'Job Planning Lines' table with a dropdown menu open for the 'Type' column. The dropdown menu shows two options: 'Resource' and 'Resource Item'. The 'Resource' option is selected. The 'Job Task No.' is 'LABOUR', the 'Planning Date' is '4/12/2021', and the 'Planned Delivery Date' is '4/12/2021'.



Click on the cell **No.**

Edit List Delete Process Report Open in Excel Actions Related Report					
g	Planned Delivery Date	Document No.	Type	No.	Description
2021	4/12/2021		Resource		
Resource Item G/L Account Text					

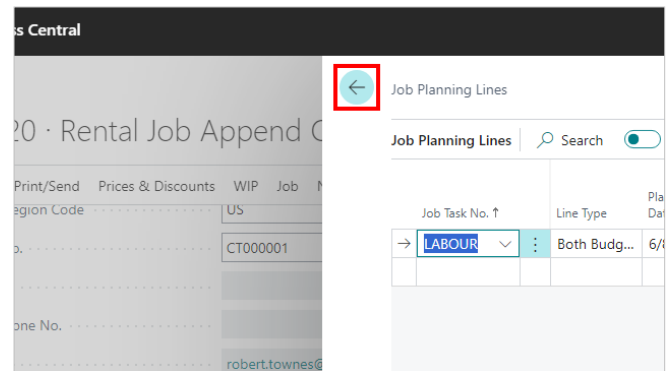
Click on the link in cell **No.** with the value **LINDA**

Delivery Date	Document No.	Type	No.	Description
4/12/2021		Resource		
LINA Lina Townsend P LINDA Linda Martin P MARK Mark Hanson P MARTY Marty Horst P + New				

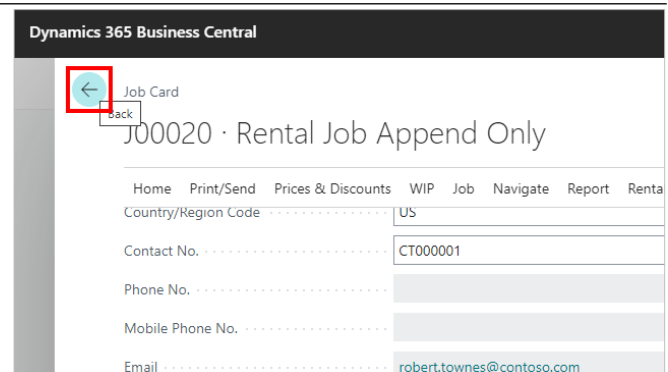
Click on the cell **Quantity** with the value **0**

Enter the text **2.**

Click on the back button



Click on the back button



4.11.3. How to Process Rental Quotes with Job Integration

4.11.3.1. Overview

The Jobs Integration provides for the following processing capabilities when using Jobs with Rental Quotes.

Add a Job No. to the Rental Quote header which provides the following processing options.

The Dimensions on the Job will flow to the Rental Quote as per the settings related to Dimensions on Jobs Setup.

When the Job has Link Rental Cont. to JPL enabled, then the Job No. defaults to rental and sales lines as lines are entered and lines are updated if added after lines are entered. The Job Task No. entry is mandatory on all lines.

- Job Planning Lines with the Type set to Budget are created for the rental and sales lines.
- When the Job Link Rental Cont. to JPL field is disabled, then the entry of the Job No. and Task No. are optional and when entered are for informational purposes only. No Job Planning Lines are created on the Job.

Create a Rental Quote with selecting a Template Job provides the ability to create a Job from the quote or automatically create a Job when the Make Contract is ran.

If the Transfer Sales Lines to Rental Contract is enabled on the Job card, then the Sales Lines on the quote will be copied to the Rental Contract when Make Contract is ran.

The Dimensions on the Rental Quote will flow to the Job as per the setting of the Rental Create Job Dim. fields on Jobs Setup as follows:

- When a Template Job that has Link Rental Cont. to JPL enabled is entered on the Rental Quote header and the rental and sales line have been entered, and contain both the Template Job No. and Job Task No., then when a Job is created either from the quote or when run Make Contract, the Job is created using the customer on the quote and Job Planning Lines with the Type of Budget are created.



- When the Job Link Rental Cont. to JPL field is disabled, then the entry of the of the Template Job No. and Job Task No. on the rental and sales lines is optional. When the Job is created using with the Create Job n the quote or when run Make Contract, no Job Planning Lines are created on the Job from the quote.

For processing Rental Quotes with Job Integration, then the Job No. and Job Task No. need to be added to the rental and sales lines on the quote using Personalize.

4.11.3.2. Processing a Rental Quote using a Job No. Linked to JPL

NOTE:
If the Job No. selected on the General tab does not have the Link Rental Cont. to JPL enabled, then the Job No. does not default to the rental and sales lines.
The Job No. and Job Task No. do not have to be entered on the lines and Job Planning Lines will not be created from the quote if they are entered on the lines.

The entry of the Job No. and Job Task No. on the rental and sales lines will be for informational purposes only.

Click on the navigation menu item **Rental Quote**

Setup & Extensions ▾

Rental Units Rental Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Order	+ Rental Unit	> Se
+ Sales Order	+ Purchase Invoice	> New	> R
+ Sales Invoice	+ Rental Quote	> Payments	☰ E
+ Purchase Quote	+ Rental Contract	> Reports	

Click on the field **Sell-to Customer Name**

Job Actions Fewer options

Mark as Completed Copy Document

[Red Boxed Field]

Line Functions Related Fewer options

Click on the link in cell **No.** with the value **10000**

Make Contract Mark as Completed Copy Document

Customer Name

Document No. RC00004

Date

10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		

Lines Manage Line Functions

al Unit	Stan... Text Code	Description
---------	-------------------------	-------------



Click on the button **Show more**

A screenshot of a web form. At the top right, there is a button labeled "Show more" in a red box. Below it, there are several input fields, some with dates like "4/12/2021".

Click on the lookup button **Job No.**

A screenshot of a web form. In the middle, there is a field labeled "Job No." with a red box around the lookup button (three dots) to its right.

Click on the link in cell **No.** with the value **J00010**

A screenshot of a web page showing a table of jobs. The table has columns "No." and "Description". The first row has "J00010" in the "No." column, which is highlighted with a red box. The description for this job is "Rental Job Linked to JPL".

The following demonstrates the entry on the Rental Lines.

The Dimension Codes and Values may be updated on the Rental Quote when the Job No. is selected, if they differ from the Dimensions defaulted to the Rental Quote when the Customer is selected.

Click on the cell **Rental Unit No.**

A screenshot of a web form. In the "Rental Lines" section, there is a field labeled "Rental Unit No." with a red box around it. To the right, there is a "Posting Date" field with the value "4/12/2021".



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows the 'Contracts Ship/Return' section with a 'Shipments Due Today' card displaying '1'. Below it, the 'Due Sales Invoice' amount is '128,378'. To the right, the 'Posting Date' is '4/12/2021'. The 'Rental Lines' table has columns: 'Rental Unit No.', 'Stan... Text Code', and 'Description'. The 'Rental Unit No.' cell is highlighted with a red box, and a dropdown menu is open showing a list of rental units. Below the table, the 'Sales Lines' section is visible with columns: 'Manage', 'Line', and 'Fewer options'.

Click on the link in cell **No.** with the value **RU00008**

The screenshot shows the 'Contracts Ship/Return' section with a 'Shipments Due Today' card displaying '1'. To the right, the 'Rental Lines' table is expanded, showing a list of rental units. The 'RU00008' link is highlighted with a red box. The table has columns: 'No. ↑' and 'Description'. The 'RU00008' link is followed by the text '18 G Brad Nailers Group'. Below the table, the 'Sales Lines' section is visible with columns: 'Manage', 'Line', and 'Fewer options'.

Click on the cell **Rental Quantity** with the value **0**

The screenshot shows the 'Contracts Ship/Return' section with a 'Shipments Due Today' card displaying '1'. To the right, the 'Rental Lines' table is expanded, showing a list of rental units. The 'Rental Quantity' cell is highlighted with a red box and contains the value '0'. The table has columns: 'Description', 'Rental Terms Code', 'Rental Quantity', 'Location Code', 'Rental Terms Code Alt1', and 'Rental Terms Code'. Below the table, the 'Sales Lines' section is visible with columns: 'Manage', 'Line', and 'Fewer options'.

Enter the text **2**.

The screenshot shows the 'Contracts Ship/Return' section with a 'Shipments Due Today' card displaying '1'. To the right, the 'Rental Lines' table is expanded, showing a list of rental units. The 'Rental Quantity' cell is highlighted with a red box and contains the value '2'. The table has columns: 'Description', 'Rental Terms Code', 'Rental Quantity', 'Location Code', 'Rental Terms Code Alt1', and 'Rental Terms Code'. Below the table, the 'Sales Lines' section is visible with columns: 'Manage', 'Line', and 'Fewer options'.



ODT Rentals Online Help

Click on the cell **Location Code**

Rental Terms Code					
er options					
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code
ilers Group	MONTH-PEND	2			
r options					

Click on the lookup button in the cell **Location Code**

Rental Terms Code					
ons					
	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code
roup	MONTH-PEND	2			
Group	MONTH-PEND	1			
Group	MONTH-PEND	1			

Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code
Group	MONTH-PEND	2			
Group	MONTH-PEND	1			
Group	MONTH-PEND	1			
			Code ↑ Name		
			→ CENTRAL Central Warehouse		
			EAST East Warehouse		
			RENTRESERV Inventory Items Rental Rese		
			SOUTH South Warehouse		
			TEMP Temporary Location		
			WEST West Warehouse		
			+ New		
			0		

Click on the cell **Job No.** with the value **J00010**

Note that the Job No. entered on the header defaulted to the line as the Job card has Link Rental Cont. to JPL enabled.

.....		4/12/2021		Rental Terms Code		.....
Manage Line Fewer options							
	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task No.	Rental Terms Code Alt1	Rental Terms Code Alt2
⋮	MONTH-PEND	2	EAST	J00010			
	MONTH-PEND	1	EAST	J00010			
	MONTH-PEND	1	EAST	J00010			



ODT Rentals Online Help

Click on the cell **Job Task No.**

The selection of a Job Task No. is mandatory when the Job has the Link Rental Cont. to JPL field enabled.

When a Job Task No. is selected on a rental group line, then the Job Task No. will default to the group child rental lines.

Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Star Date
NTH-PEND	2	EAST	J00010				4/12/202
NTH-PEND	1	EAST	J00010				4/12/202
NTH-PEND	1	EAST	J00010				4/12/202

Click on the lookup button in the cell **Job Task No.**

Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Star Date
ND	2	EAST	J00010				4/12/202
ND	1	EAST	J00010				4/12/202
ND	1	EAST	J00010				4/12/202

Click on the link in cell **Job Task No.** with the value **RENTAL**

Job Task No.	Description
LABOUR	Labour
RENTAL	Rentals
SERVICE	Materials

Click on the cell **Rental Unit No.**

Rental Unit No.	Description
RU00008	18 G Brad Nailers Group
	18 G Brad Nailers Group
	18 G Brad Nailers Group



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Fewer options
Rental Unit No.	Stan... Text Code	Description		
RU00008		18 G Brad Nailers Group		
→	<div>...</div>		18 G Brad Nailers Group	
			18 G Brad Nailers Group	
<div>←</div>				
Sales Lines		Manage	Line	Fewer options

Click on the link in cell **No.** with the value **RU00008-001**

Sell to Custom

⋮

10000

Process

Report

Quote

Job

Actions

Rental Unit List

🔍 Search

Rental

📄 Open in Excel

Rela

No. ↑	Description
→ RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Fewer options
Rental Unit No.	Stan... Text Code	Description		
RU00008		18 G Brad Nailers Gr		
→ 0008-001	...	18 G Brad Nailer		
	...	18 G Brad Nailers Gr		
4				
Sales Lines		Manage	Line	Fewer options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Fewer options
Rental Unit No.	Stan... Text Code	Description		
RU00008		18 G Brad Nailers Group		
RU00008-001		18 G Brad Nailer		
→	...	18 G Brad Nailers Group		
Review or update the value for Rental Unit No.				
Sales Lines		Manage	Line	Fewer options



ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00008-002**

Rental Unit List	
Search	Rental
Open in Excel	Rela
No. ↑	Description
→ RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer
RU00008-0...	18 G Brad Nailer

The following demonstrates the entry of Sales Lines on a Rental Quote.

Click on the cell **Type**

Overdue Sales Invoice Amount	
\$128,378	
> See more	
Sales Invoices	
7	
>	

Adatum Corporation	
Sales Lines	
Manage	Line
Fewer options	
Type	No.
Description	
→	

Click on the item **Item** in the list

Overdue Sales Invoice Amount	
\$128,378	
> See more	
Sales Invoices	
7	
>	

Adatum Corporation	
Sales Lines	
Manage	Line
Fewer options	
Type	No.
Description	
→	
G/L Account	
Item	
Resource	
Fixed Asset	
Charge (Item)	

Click on the cell **No.**

Overdue Sales Invoice Amount	
\$128,378	
> See more	
Sales Invoices	
7	
>	

Adatum Corporation	
Sales Lines	
Manage	Line
Fewer options	
Type	No.
Description	
→	
Item	



ODT Rentals Online Help

Click on the link in cell **No.** with the value **1005**

Rental Unit No.	Description	Rental Terms Code
RU00008	18 G Brad Nailers Group	MONTH-PEND
→		
No. ↑	Description	Bas Me
1003	Air Impact Wrench, 1 in.	PC
1004	Air Impact Wrench, 1/2 inch	PC
1005	Generator Lubricant	PC
1006	Series 10 Sucker Rod Overshot	PC
1007	Basket Grapple	PC
+ New		
Type		
→ Item		

Click on the cell **Location Code**

No.	Description	Location Code	Quantity	Job No.	Job Task No.	U
1005	Generator Lubricant		0	J00010		PC

Click on the link in cell **Code** with the value **EAST**

Description	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task
18 G Brad Nailers Group	MONTH-PEND	2	EAST	J00010	RENTAL
18 G Brad Nailers Group	MONTH				
18 G Brad Nailers Group	MONTH				
			Code ↑	Name	
			→ CENTRAL	Central Warehouse	
			EAST	East Warehouse	
			MAIN	Main Warehouse	
			RENTRESERV	Inventory Items Rental Rese	
			SOUTH	South Warehouse	
			+ New		
No.	Description				
1005	Generator Lubricant				PCS

Click on the cell **Quantity** with the value **0**

Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
Generator Lubricant	EAST	0	J00010		PCS

Enter the text **2**.

Line	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
5	Generator Lubricant	EAST	<input type="text" value="2"/>	J00010		PCS

Note that the Job No. has defaulted to the Sales line from the header.

Click on the cell **Job Task No.**

Line	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
	Lubricant	EAST	2	J0001	<input type="text" value=""/>	PCS

Click on the lookup button in the cell **Job Task No.**

Line	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
t		EAST	2	J00010	<input type="text" value=""/>	PCS

DC Rent Mo... Review or update the value for Job Task No.

Click on the link in cell **Job Task No.** with the value **SERVICE**

Job Task Lines - J00010 - Rental Job Lin

Job Task No.	Description
→ LABOUR	Labour
RENTAL	Rentals
SERVICE	Materials

Contracts Ship/Return
Shipments Due Today
1



Click on **Type**

The screenshot shows the 'Overdue Sales Invoice Amount' as \$128,378. Below this, there is a 'Sales Invoices' section with a '7' and a '> See more' link. To the right, there is a table with columns 'Type', 'No.', and 'Description'. The first row has 'Item' in the 'Type' column, '1005' in the 'No.' column, and 'Generator Lubr' in the 'Description' column. A red box highlights the 'Type' column header and the 'Item' dropdown menu.

Click on the item **Resource** in the list

The screenshot shows the same interface as the previous one, but the dropdown menu is open, showing a list of items: 'G/L Account', 'Item', 'Resource', 'Fixed Asset', and 'Charge (Item)'. The 'Resource' item is highlighted with a blue background. A red box highlights the dropdown menu.

Click on the cell **No.**

The screenshot shows the same interface as the previous ones, but the 'No.' cell in the table is highlighted with a red box. The table has columns 'Type', 'No.', 'Description', and 'Location Code'. The first row has 'Resource' in the 'Type' column, '1005' in the 'No.' column, 'Generator Lubricant' in the 'Description' column, and 'EAST' in the 'Location Code' column.

Click on the link in cell **No.** with the value **LINDA**

The screenshot shows the same interface as the previous ones, but the dropdown menu is open, showing a list of names: 'KATHERINE', 'LINA', 'LINDA', 'MARK', 'MARTY', and '+ New'. The 'LINDA' link is highlighted with a red box. The table has columns 'No.', 'Code', 'Description', and 'Rental Terms'. The first row has 'RU00008' in the 'No.' column, '18 G Brad Nailers Group' in the 'Description' column, and 'MONTH-PE' in the 'Rental Terms' column.



ODT Rentals Online Help

Click on the cell **Quantity** with the value **0**

ge Line Fewer options							
	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
5	Generator Lubricant	EAST	2	J00010	SERVICE	PCS	
DA	Linda Martin		0	J00010		HOUR	

Enter the text **2**.

ge Line Fewer options							
	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
5	Generator Lubricant	EAST	2	J00010	SERVICE	PCS	
DA	Linda Martin		2	J00010		HOUR	

Click on the cell **Job Task No.**

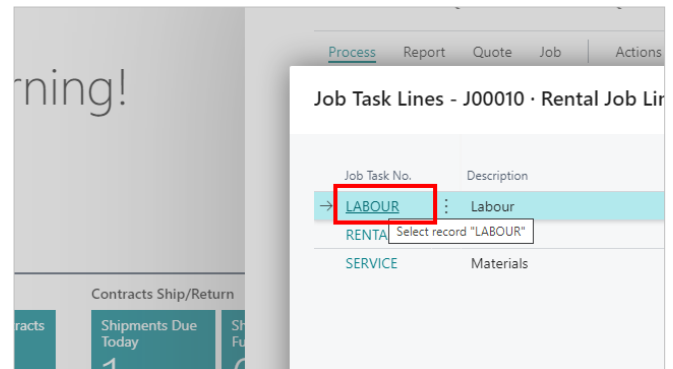
ptions							
	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code		
Lubricant	EAST	2	J00010	SERVICE	PCS		
tin		2	J00010		HOUR		

Click on the lookup button in the cell **Job Task No.**

	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code		
t	EAST	2	J00010	SERVICE	PCS		
		2	J00010		HOUR		

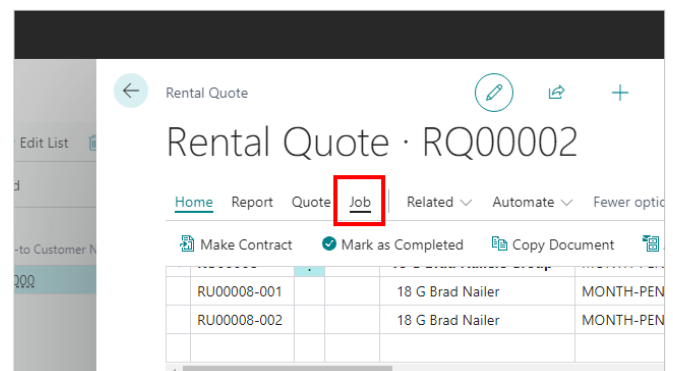
DC Rent More Corp.

Click on the link in cell **Job Task No.** with the value **LABOUR**

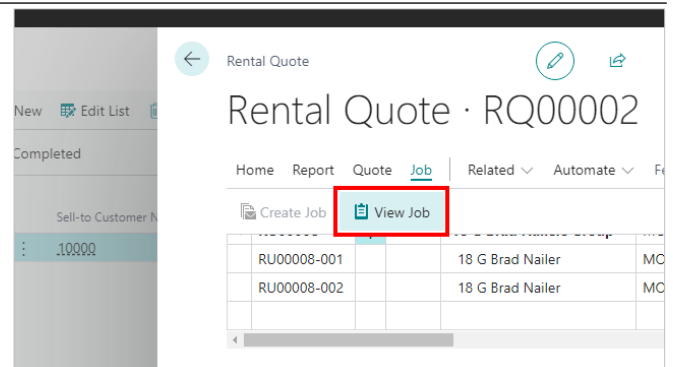


The following demonstrates viewing the Job from the quote and the Job Planning Lines created with the Type of Budget.

Click on the navigation menu item popup **Job**



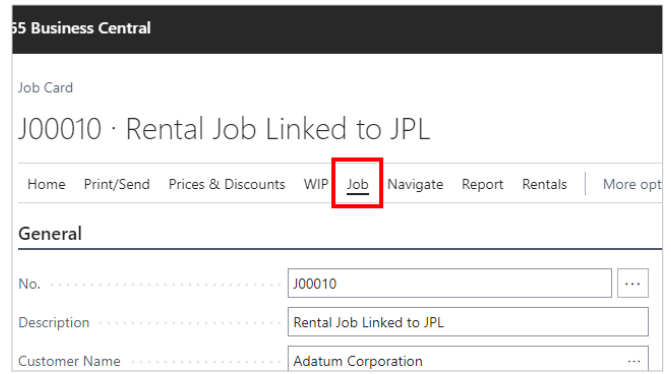
Click on the navigation menu item **View Job**



The following picture displays the Tasks lines which shows the budgeted amounts from the Job Planning Lines created from the Rental Quote.

Tasks		Manage	Line	Fewer options					
Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	Budget (Total Price)		
LABOUR	Labour	Posting	4/12/2021	4/12/2021	169.40	—	308.00		
RENTAL	Rentals	Posting	4/12/2021	4/12/2021	—	—	300.00		
→ SERVICE	Materials	Posting	4/12/2021	4/12/2021	15.00	—	30.00		

Click on the navigation menu item popup **Job**



55 Business Central

Job Card

J00010 · Rental Job Linked to JPL

Home Print/Send Prices & Discounts WIP **Job** Navigate Report Rentals More options

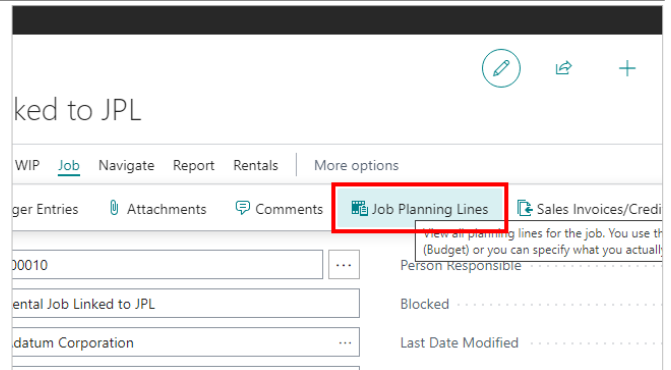
General

No. J00010

Description Rental Job Linked to JPL

Customer Name Adatum Corporation

Click on the navigation menu item **Job Planning Lines**



Job Planning Lines

WIP **Job Planning Lines** Navigate Report Rentals More options

ger Entries Attachments Comments Job Planning Lines Sales Invoices/Credi

J00010

Rental Job Linked to JPL

Adatum Corporation

Blocked

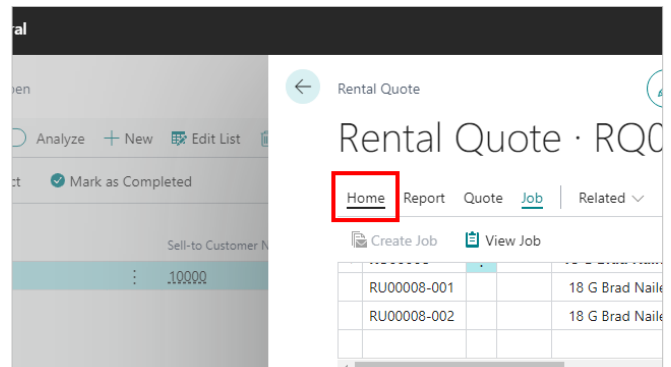
Last Date Modified

The following picture displays all of the Job Planning Lines with the Type set to Budget created from the Rental Quote as the lines were entered.

J00010 Rental Job Linked to JPL LABOUR Labour | Work Date: 4/12/2021														
Job Planning Lines														
Job Task No. ↑	Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Quantity	Location Code	Unit Cost	Total Cost	Unit Price	Line Amount	Qty. to Transfer to Journal
→ LABOUR	Budget	4/12/2021	4/12/2021	RQ00005	Resource	LINDA	Linda Martin	2		84.70	169.40	154.00	308.00	0
RENTAL	Budget	4/12/2021	4/12/2021	RQ00005	G/L Account	40100	18 G Brad Nail	1	EAST	0.00	0.00	150.00	150.00	0
RENTAL	Budget	4/12/2021	4/12/2021	RQ00005	G/L Account	40100	18 G Brad Nail	1	EAST	0.00	0.00	150.00	150.00	0
SERVICE	Budget	4/12/2021	4/12/2021	RQ00005	Item	1005	Generator Lubricant	2	EAST	7.50	15.00	15.00	30.00	0

- The Document No. field contains the Rental Quote No.
- The Description field when the job planning line is created from a Rental Line will contain the description from the Rental Line.
- The amounts in the unit cost and price fields come from the rental and sales lines as applicable. For lines created from Rental Lines there will not be a Unit Cost or Total Cost.

Click on the navigation menu item popup **Home**



Rental Quote

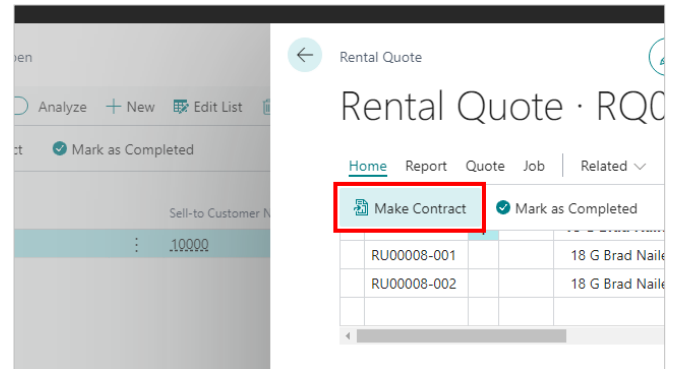
Rental Quote · RQ00005

Home Report Quote **Job** Related

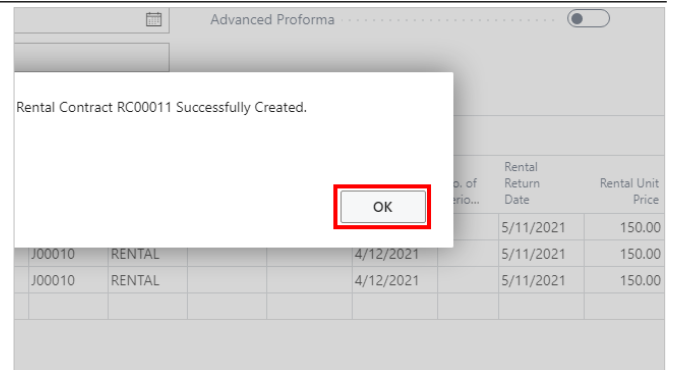
Create Job View Job

RU00008-001	18 G Brad Nail
RU00008-002	18 G Brad Nail

Click on the navigation menu item **Make Contract**



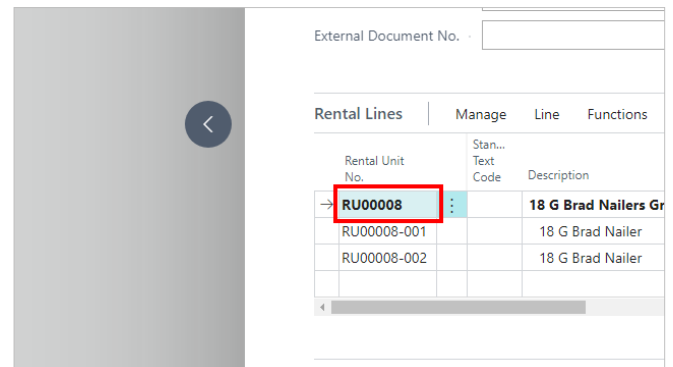
Click on the button **OK**



The Rental Contract is automatically displayed when Make Contract is ran.

The Rental Contract, General tab will contain the Job No. from the quote and the Rental Lines will be the same as entered on the quote.

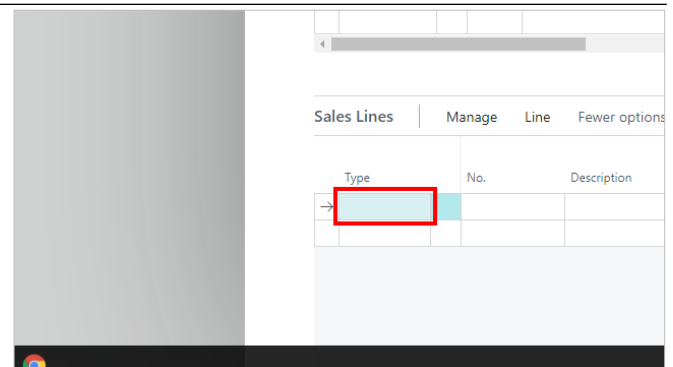
Click on the cell **Rental Unit No.** with the value **RU00008**



Click on the cell **Type**

When Make Contract is ran from a Rental Quote which has Sales Lines, the Sales Lines are not carried forward to the Rental Contract when the Transfer Sales Lines to Rental Contract is not enabled on the Job card.

If and when these are to be billed, then the sales lines will need to be entered on the contract Sales Lines prior to invoicing them.



If the Transfer Sales Lines to Rental Contract is enabled, then the Sales Lines will be copied to the Rental Contract, Sales Lines.

4.11.3.3. Processing a Rental Quote and Creating a Job linked to JPL

The following example demonstrates:

- The creation of a Rental Quote with the entry of a Job Template No. on the header that has the Link Rental



ODT Rentals Online Help

- Cont. to JPL enabled and the Job Template has the Tasks defined.
- The Job has the field Transfer Sales Lines to Rental Contract enabled.
 - Creating a Job from the Rental Quote.

When the Job is created, the Tasks and Job Planning Lines with a Type of Budget will be automatically created based on the Rental Lines and Sales Lines entered on the Rental Quote.

The Dimension Codes and Values on the new Job will depend on the setting on the Jobs Setup, Rental Create Job Dim. If the field is enabled, then the Dimension Codes and Value on the Rental Quote will flow to the new Job and Tasks created.

NOTE:
Optionally, the Make Contract menu option can be selected, which will create the Job and the Rental Contract.

NOTE:
The same process is used to create a Job and the Tasks from a Rental Quote when on the Template Job card, the Link Rental Cont. to JPL field is disabled.
The difference is that no Job Planning Lines are created.

Click on the navigation menu item **Rental Quote**

ons ▾ | ≡

Packages Group Avail. Matrix Rental Inventory Avail.

Actions

+ Sales Quote	+ Purchase Quote	+ Rental Quote	> New	> Set
+ Sales Order	+ Purchase Order	+ Rental Contract	> Payments	> Re
+ Sales Invoice	+ Purchase Invoice	+ Rental Unit	> Reports	Exc

Click on the lookup button **Sell-to Customer Name**

Make Contract Mark as Completed Copy Document

General

Sell-to Customer Na... **▼** Order Date

External Document No. Document Date

Posting Date Rental Terms Code

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code	Rental Quantity

Click on the link in cell **No.** with the value **20000**

General

Sell-to Customer Na... Order Date

External Document No. Document Date

Posting Date Rental Terms Code

Rental Lines | Man

No. ↑	Name	ZIF
→ 10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31
+ New		



ODT Rentals Online Help

Click on the button **Show more**

The screenshot shows a form with fields for 'Order Date' (4/12/2021), 'Document Date' (4/12/2021), and 'Rental Terms Code'. A red box highlights the 'Show more' button. A tooltip 'Show more fields' is visible next to it. On the right, there is a sidebar with links: 'New', 'Payments', 'Reports', 'Setu', 'Rent', and 'Exce'.

Click on the lookup button **Job Template No.**

The screenshot shows a form with fields for 'Job Calendar' (RENTAL), 'Optimized Rental C...' (No), 'nal Time Zone' (Mountain Standard Time), 'nt Time Zone' (Mountain Standard Time), 'Zone Difference', 'emplate No.' (with a dropdown arrow highlighted by a red box), 'Jo.', 'of Archived Versi...' (0), and 'e Loss Reason'.

Click on the link in cell **No.** with the value **JOB TEMPLATE 1**

Note that the Template Job has Customer 10000 specified.
The Customer No. on the Template Job is not used on the Rental Quote nor when creating the Job from the quote.
The Bill-to Customer on the Rental Quote will be used when creating the Job.

The screenshot shows the dropdown menu for 'Job Template No.'. It lists 'JOB TEMPL...' as the selected option. Other options include 'Job Template 1 - link RC to JPL'. The 'No.' column is highlighted by a red box.

Click on the cell **Rental Unit No.**

The screenshot shows a table with columns 'Rental Unit No.', 'Stan... Text Code', and 'Description'. The 'Rental Unit No.' column is highlighted by a red box. The table also shows 'Sales Lines' and 'Manage' buttons.



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Contracts Ship/Return

Shipments Due Today
2

Overdue Sales Invoice Amount
128,378

Posting Date 4/12/2021

Rental Lines	Manage	Line	Functions	Related
Rental Unit No.	Stan... Text Code	Description		
→	...			
RENTAL				
RU20000				
Month Pro-Per End EOM				
Sale OWN LOG.				
Fewer options				

Click on the link in cell **No.** with the value **RU00011**

2

Overdue Sales Invoice Amount
\$128,378

> See more

No.	Description
RU00010	Framing Air Nailer Group
RU00010-0...	Framing Air Nailer
RU00010-0...	Framing Air Nailer
RU00010-0...	Framing Air Nailer
RU00010-0...	Framing Air Nailer
RU00010-0...	Framing Air Nailer
→ RU00011	Power Shovel Group
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel
RU00011-0...	Power Shovel

Click on the cell **Rental Quantity** with the value **0**

21

Rental Terms Code

line Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Ta No.
Power Shovel Group	MONTH-PEND	0		TEMPLAT...	

line Fewer options

Enter the text **2**.

21

Rental Terms Code

line Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Ta No.
Power Shovel Group	MONTH-PEND	2		TEMPLAT...	

line Fewer options



ODT Rentals Online Help

Click on the cell **Location Code**

	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Ta No.
Group	MONTH-PEND	2		TEMPLAT...	

Click on the lookup button in the cell **Location Code**

	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Ta No.
p	MONTH-PEND	2		TEMPLAT...	
p	MONTH-PEND	1		TEMPLAT...	
p	MONTH-PEND	1		TEMPLAT...	

Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Ta No.
ip	MONTH-PEND	2		TEMPLAT...	
up	MONTH-PEND	1			
up	MONTH-PEND	1			

Code ↑

Name

→ CENTRAL Central Warehouse

EAST East Warehouse

RENTRESERV Inventory Items Rental Rese

SOUTH South Warehouse

TEMP Temporary Location

WEST West Warehouse

+ New

Click on the lookup button in the cell **Job Task No.**

Date 4/12/2021 Rental Terms Code

lines Manage Line Fewer options

al Unit	Location Code	Job No.	Job Task No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	No. of Perio...
0011	EAST	TEMPLATE 1				4/12/2021	
	EAST	TEMPLATE 1				4/12/2021	
	EAST	TEMPLATE 1				4/12/2021	



ODT Rentals Online Help

Click on the link in cell **Job Task No.** with the value **RENTAL**

Job Task No.	Description
→ LABOUR	Labour
→ RENTAL	Rentals
SERVICE	Materials

Click on the cell **Rental Unit No.**

Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date
→ RU00011	4/12/2021		5/11/2021
	4/12/2021		5/11/2021
	4/12/2021		5/11/2021

Click on the lookup button in the cell **Rental Unit No.**

Rental Unit No.	Rental Start Date	No. of Perio...	Rental Return Date	Ren
→ RU00011	4/12/2021		5/11/2021	9
	4/12/2021		5/11/2021	9
				9

Click on the link in cell **No.** with the value **RU00011-001**

No. ↑	Description
→ RU00011-001	Power Shovel
RU00011-001	Select record "RU00011-001"
RU00011-001	Power Shovel



Click on the item **Item** in the list

Overdue Sales Invoice Amount
\$128,378
[See more](#)

Sales Invoices
7

Sales Lines | Manage | Line | Fewer options

Type	No.	Description
→		
G/L Account		
Item		
Resc Item		
Fixed Asset		
Charge (Item)		

Click on the lookup button in the cell **No.**

78

Sales Lines | Manage | Line | Fewer options

Type	No.	Description	Location Code	Quantity
→ Item				
Review or update the value for No.				

Click on the link in cell **No.** with the value **1005**

Rental Lines | Manage | Line | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms
RU00011		Power Shovel Group	MONTH-PE
RU00011-001			
→ RU00011-002			
		No. ↑	Description
		1005	Generator Lubricant
		1006	Series 10 Sucker Rod Overshot
		1007	Basket Grapple
		1008	Spiral Grapple
		1896-S	ATHENS Desk
		+ New	

Sales Lines | Manage | Line | Fewer options

Type	No.	Description	Location Code	Quantity	Job No.	Job Task No.
→						

Click on the cell **Location Code**

Manage | Line | Fewer options

No.	Description	Location Code	Quantity	Job No.	Job Task No.
→ 1005	Generator Lubricant		0	TEMPLA...	

ODT Rentals Online Help


Click on the link in cell **Code** with the value **EAST**

Stan...	Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Job No.
		Power Shovel Group	MONTH-PEND	2	EAST	TEMPLATE 1
		Power Shovel				
		Power Shovel				
			Code ↑		Name	
			→ CENTRAL		Central Warehouse	
			EAST		East Warehouse	
			MAIN		Select record "EAST" Main Warehouse	
			RENTRESERV		Inventory Items Rental Rese	
			SOUTH		South Warehouse	
			TEMP		Temporary Location	
			+ New			
Manage	Line	Fewer options				
	No.	Description				
	1005	Generator Lubricant		0	TEMPLA...	PCS

Click on the cell **Quantity** with the value **0**

ge	Line	Fewer options				
	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
05	Generator Lubricant	EAST	0	EMPLA...		PCS

Enter the text **2**.

ge	Line	Fewer options					
	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
05	Generator Lubricant	EAST	<div><div></div><div>0</div></div>	EMPLA...		PCS	

Click on the cell **Job Task No.**

	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
Lubricant	EAST	2	TEMPLA.		PCS



ODT Rentals Online Help

Click on the lookup button in the cell **Job Task No.**

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
EAST	2	TEMPLA...	<div>...</div>	PCS

Click on the link in cell **Job Task No.** with the value **SERVICE**

Job Task Lines - TEMPLATE 1 · Rental T

Job Task No.	Description
→ LABOUR	Labour
RENTAL	Rentals
<div>SERVICE</div>	Materials

Click on the cell **Type**

Overdue Sales Invoice Amount
\$128,378
> See more

Sales Invoices
7
>

Sales Lines | Manage | Line | Fewer options

Type	No.	Description
Item	1005	Generator Lubr
<div></div>		

Click on the item **Resource** in the list

Overdue Sales Invoice Amount
\$128,378
> See more

Sales Invoices
7
>

Sales Lines | Manage | Line | Fewer options

Type	No.	Description
Item	1005	Generator Lubr
<div></div>		

G/L Account

Item

Resource

Fixed Resource

Charge (item)



Click on the cell **No.**

Type	No.	Description	Location Code
Item	1005	Generator Lubricant	EAST
→ Resource			

Click on the lookup button in the cell **No.**

Type	No.	Description	Location Code	Quantity
Item	1005	Generator Lubricant	EAST	
→ Resource				

Click on the link in cell **No.** with the value **LINDA**

No.	Code	Description	Rental terms
RU00011		Power Shovel Group	MONTH-PE
RU00011-001		Power Shovel	MONTH-PE
→ RU00011-002			

No. ↑	Name	T
→ KATHERINE	KATHERINE HULL	P
LINA	Lina Townsend	P
LINDA	Linda Martin	P
MARK	Mark Hanson	P
MARTY	Marty Horst	P
MARY	Mary A. ...	P
+ New		

Click on the cell **Quantity** with the value **0**

Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
Generator Lubricant	EAST	2	TEMPLA...	SERVICE	PCS
DA		0	TEMPLA...		HOOR

Enter the text **2**.

Line	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
5	Generator Lubricant	EAST	2	TEMPLA...	SERVICE	PCS
DA	Linda Martin			TEMPLA...		HOURL

Click on the cell **Job Task No.**

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
Lubricant	EAST	2	TEMPLA... SERVICE	PCS
tin		2	TEMPLA...	HOURL

Click on the lookup button in the cell **Job Task No.**

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
t	EAST	2	TEMPLA... SERVICE	PCS
		2	TEMPLA...	HOURL

Click on the link in cell **Job Task No.** with the value **LABOUR**

Job Task No.	Description
LABOUR	Labour
RENTAL	Rentals
SERVICE	Materials

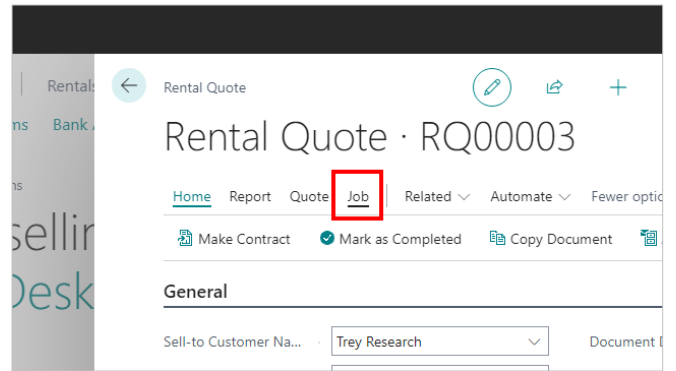
The following demonstrates creating the Job directly from a Rental Quote and a review of the Job, Tasks and Job Planning Lines.

NOTE:

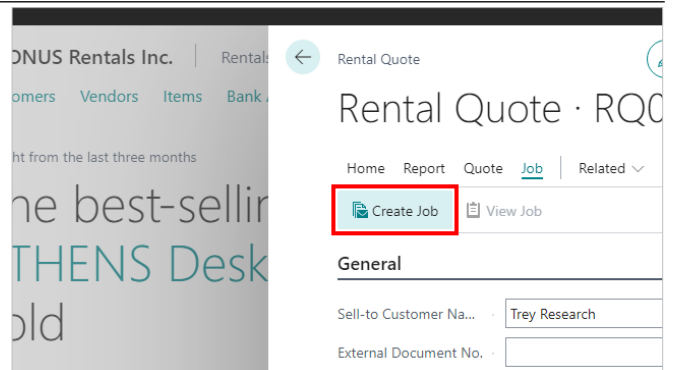
If the Job is not created directly from the Rental Quote, then the Job and Job Planning Lines with the Type of Budget will be created when Make Contract is ran.



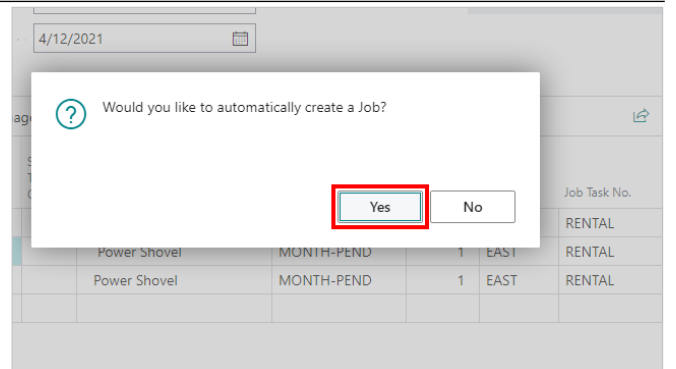
Click on the navigation menu item popup **Job**



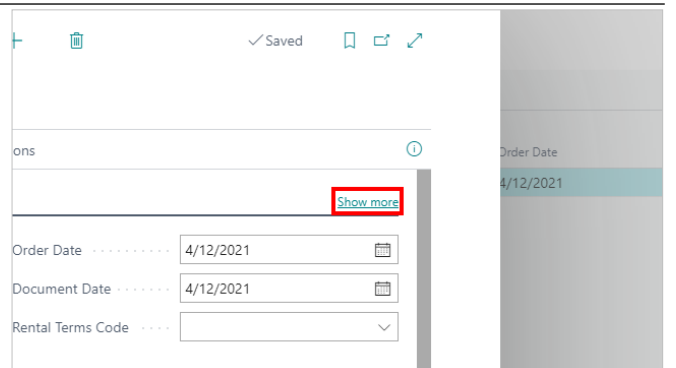
Click on the navigation menu item **Create Job**



Click on the button **Yes**



Click on the button **Show more**





ODT Rentals Online Help

Click on the field **Job No.**

Note that the Job No. field is now populated with the created Job No. and that the Template Job No. field is now blank.

Click on the navigation menu item popup **Job**

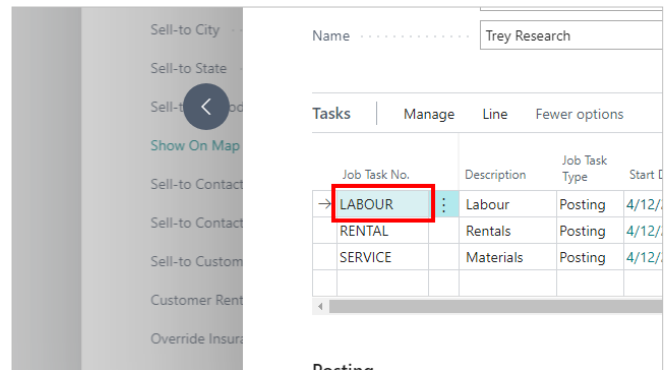
Click on the navigation menu item **View Job**

Click on the field **Description**

The Job Description will need to be modified to be descriptive of the Job created.

Click on the cell **Job Task No.** with the value **LABOUR**

The Tasks are created from the Job Template card.



Job Task No.	Description	Job Task Type	Start Date
LABOUR	Labour	Posting	4/12/2021
RENTAL	Rentals	Posting	4/12/2021
SERVICE	Materials	Posting	4/12/2021

The Job Planning Lines can be reviewed for all Tasks using the following steps.

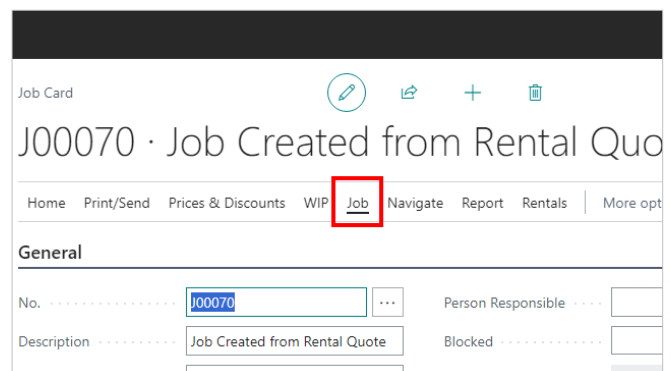
NOTE:

To review the Budget Type Job Planning Lines per Task, select a task line and either select Lines, Job, then Job Planning Lines, or click on the amount in the Budget (Total Price) field on the task line.

NOTE:

Should the Rental or Sales Lines contain a Line Discount %, this will flow through to the Job Planning Lines.

Click on the navigation menu item popup **Job**



Job Card

J00070 · Job Created from Rental Quote

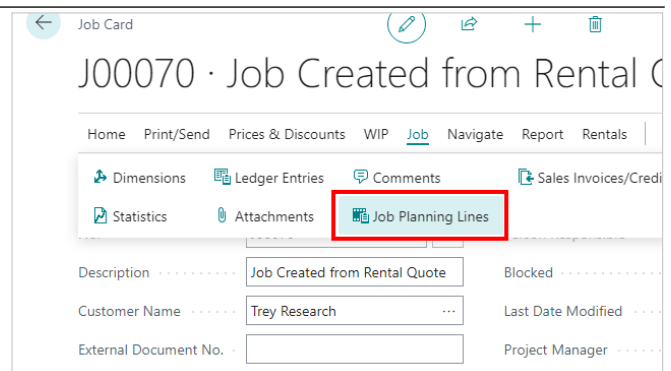
Home Print/Send Prices & Discounts WIP **Job** Navigate Report Rentals More options

General

No. J00070 Person Responsible

Description Job Created from Rental Quote Blocked

Click on the navigation menu item **Job Planning Lines**



Job Card

J00070 · Job Created from Rental Quote

Home Print/Send Prices & Discounts WIP **Job** Navigate Report Rentals More options

Dimensions Ledger Entries Comments Sales Invoices/Credit

Statistics Attachments **Job Planning Lines**

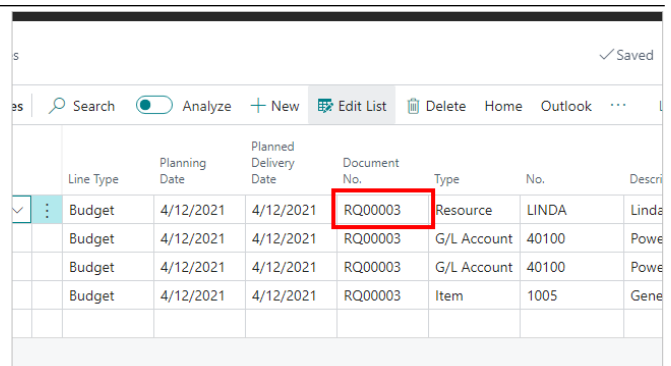
Description Job Created from Rental Quote Blocked

Customer Name Trey Research Last Date Modified

External Document No. Project Manager

Click on the cell **Document No.** with the value **RQ00003**

Note that the created Job Planning Lines with Type of Budget include the Rental Quote No. in the Document No. column, and the lines from both the rental and sales lines.



Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description
Budget	4/12/2021	4/12/2021	RQ00003	Resource	LINDA	Linda
Budget	4/12/2021	4/12/2021	RQ00003	G/L Account	40100	Power
Budget	4/12/2021	4/12/2021	RQ00003	G/L Account	40100	Power
Budget	4/12/2021	4/12/2021	RQ00003	Item	1005	Gene

When Make Contract is ran from a Rental Quote which has Sales Lines, the Sales Lines are carried forward to the Rental Contract, Sales Lines when the field Transfer Sales Lines to Rental Contract is enabled on the



Template Job card.

If the Transfer Sales Lines to Rental Contract was disabled on the Job and Make Contract is ran from the quote, then the Sales Lines would need to be entered on the contract Sales Lines prior to invoicing them.

4.11.4. How to Create a Rental Contract from a Job Card

4.11.4.1. Overview

The Job Integration feature provides the ability to create a Rental Contract directly from a Job card.

When a Rental Contract is created from a Job, the Customer, Job No. and Dimensions can flow to the new contract.

The Dimension Codes and Values flowing to the new contract are managed by the settings on Jobs Setup.

4.11.4.2. How to Create a Rental Contract from a Job

The following example demonstrates the creating of a Rental Contract from a Job.

The Job has the field Link Rental Cont. to JPL enabled. Therefore the Job No. will default to all rental and sales lines. When entering the lines the selection of a Job Task No. will be mandatory.

To demonstrate the On the Job card the Department Dimension Value was changed from Sales to Rentals and the BusinessGroup Dimension Code with a Dimension Value of Industrial will be added.

On Jobs Setup, the Update All Dimension on Rental docs. is enabled.

Therefore on the Rental Contract the changes will flow to the Rental Contract.

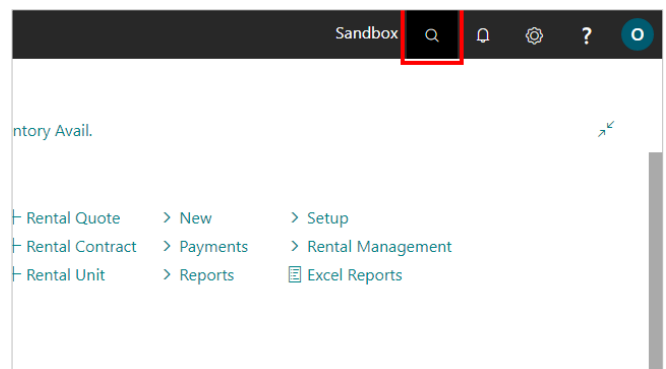
NOTE:

If the Job card field Link Rental Cont. to JPL is disabled the Job No. will not default to the rental and sales lines.

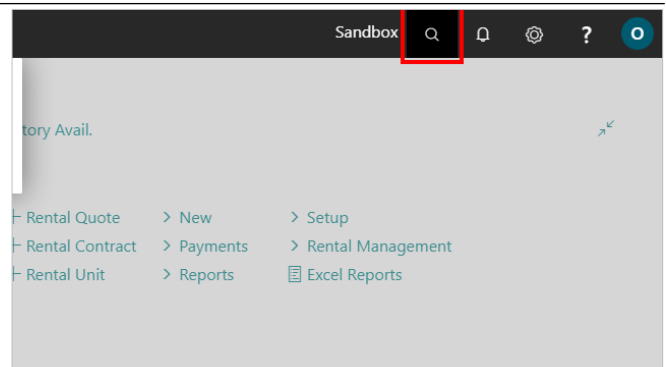
The entry of a Job No. and Job Task No. on the rental and sales lines will be optional.

The entry of these will be for informational purposes only on the rental documents.

Click on the link **Search**

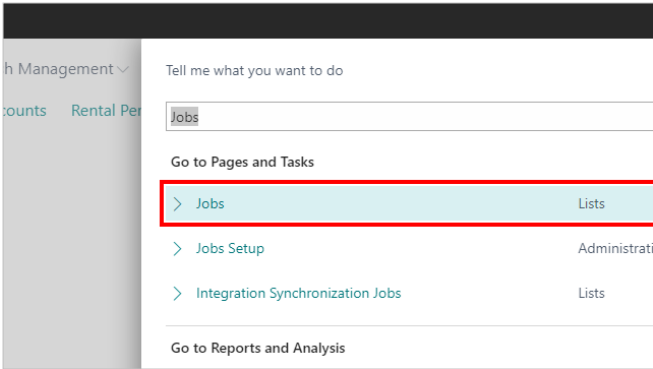


Enter **Search**.

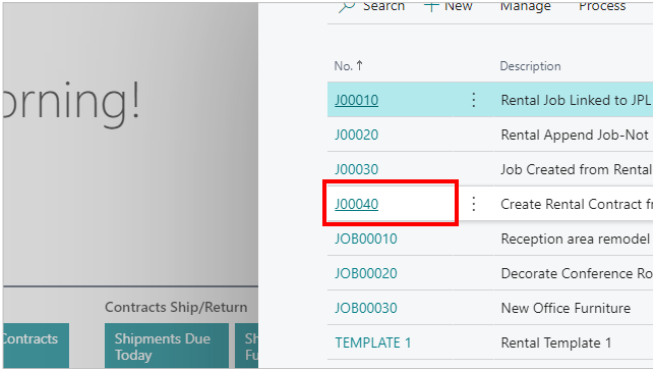




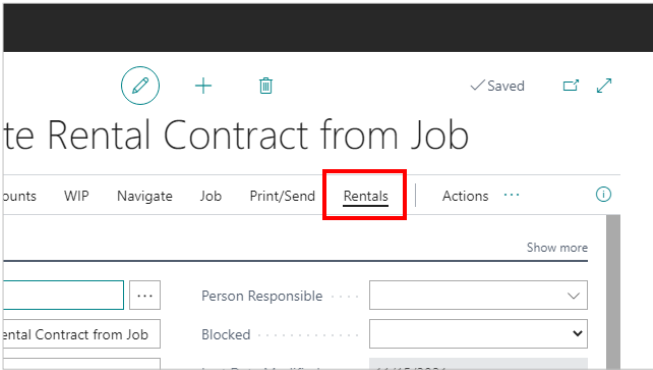
Click on **Jobs Lists** ☐



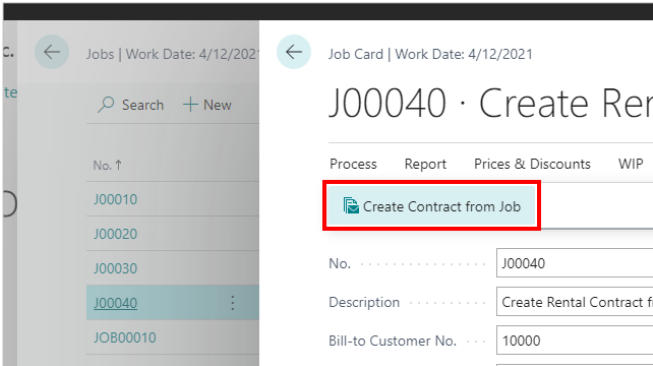
Click on the link in cell **No.** with the value **J00040**



Click on the navigation menu item popup **Rentals**



Click on the navigation menu item **Create Contract from Job**



The Rental Contract card will automatically open.



ODT Rentals Online Help

Click on the field **Job No.**

Note that the Job No. is populated on the Rental Contract, General tab.

The screenshot shows a form with several fields. The 'Job No.' field is highlighted with a red box and contains the value 'J00040'. Other fields include 'Rental Calendar' (RENTAL), 'Customized Rental C...' (No), 'Original Time Zone' (Mountain Standard Time), 'Current Time Zone' (Mountain Standard Time), 'Time Zone Difference' (), 'Advanced Proforma' (toggle), and 'Functions' (Related, Fewer options).

The following shows that the Dimensions on the Rental Contract for the Department Value and the BusinessGroup were set to the same as on the Job.

Click on the navigation menu item popup **Contract**

The screenshot shows the 'Rental Contract' form with the 'Contract' tab selected. The 'General' section is visible, showing 'Sell-to Customer Na...' (Adatum Corporation) and 'Sell-To' (192 Market Square). The 'Contract' tab is highlighted with a red box.

Click on the navigation menu item **Dimensions**

The screenshot shows the 'Rental Contract' form with the 'Dimensions' tab selected. The 'Customer' and 'Dimensions' tabs are visible. The 'Dimensions' tab is highlighted with a red box.

Click on the cell **Dimension Code** with the value **BUSINESSGROUP**

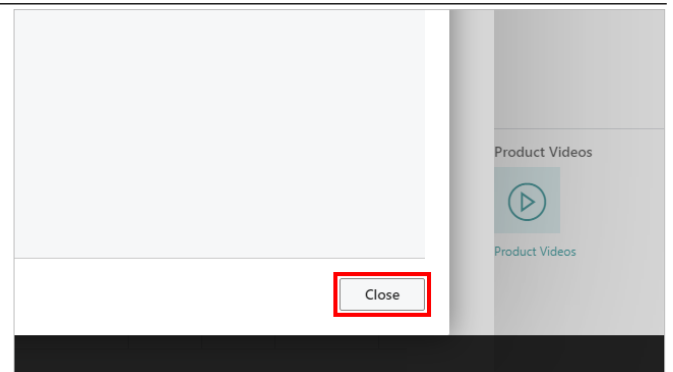
The screenshot shows a table titled 'Edit - Rental Contract RC00013 - Edit Dimension Set Entries'. The table has columns for 'Dimension Code', 'Dimension Value Code', and 'Dimension Value'. The 'BUSINESSGROUP' row is highlighted with a red box.

Dimension Code ↑	Dimension Value Code	Dimension Value
AREA	70	America Nor
BUSINESSGROUP	INDUSTRIAL	Industrial
CUSTOMERGROUP	SMALL	Small Busine
DEPARTMENT	RENTALS	Rentals
SALESPERSON	JO	Jim Olive

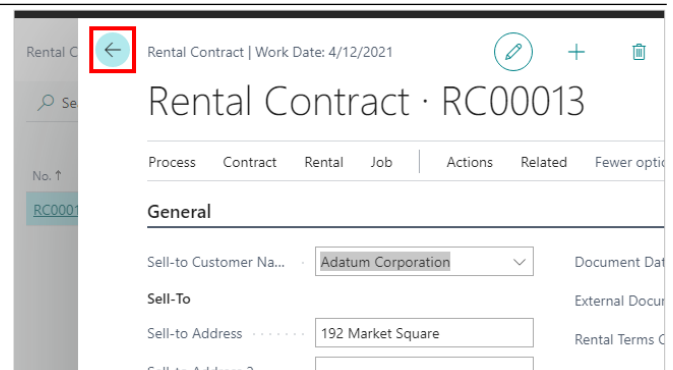
Click on the cell **Dimension Code** with the value **DEPARTMENT**

Search + New Edit List Delete Open in Excel			
Dimension Code ↑		Dimension Value Code	Dimension Val
AREA		70	America Nor
→ BUSINESSGROUP	:	INDUSTRIAL	Industrial
CUSTOMERGROUP	:	SMALL	Small Busine
DEPARTMENT	:	RENTALS	Rentals
SALESPERSON	DEPARTMENT	JO	Jim Olive

Click on the button **Close**



Click on the back button

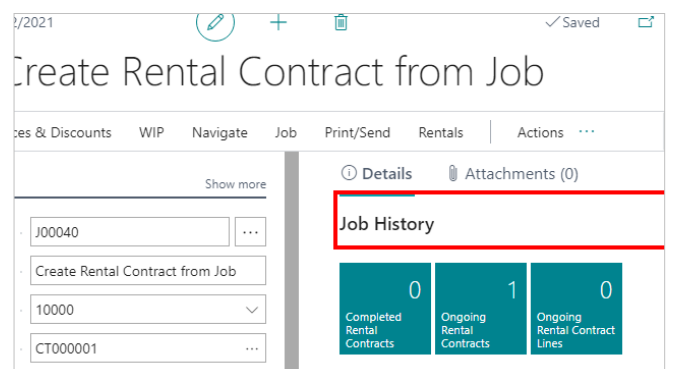


The Job History cue, Ongoing Rental Contracts, and Job Rental Contracts fact boxes have been updated to include the Rental Contract created.

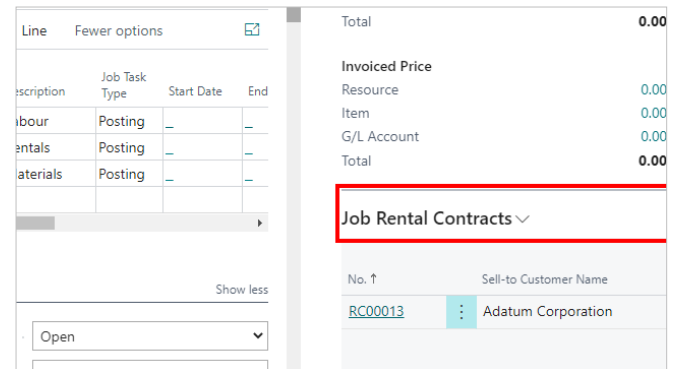
Selecting the Ongoing Rental Contracts cue opens a list of open Rental Contracts which have the related Job No. on the general tab. The contract can be opened from the list.

In the Job Rental Contracts fact box, selecting the No. will open the Rental Contract.

Click on **Job History**



Click on **Job Rental Contracts**



The entry of rental and sales lines and the processing of this contract is demonstrated in the User Help called, How to Process a Contract Linked to Job Planning Lines.

4.11.5. How to Process a Contract Linked to Job Planning Lines

4.11.5.1. Overview

When processing a Rental Contract that has a Job No. on the General tab which has the Link Rental Cont. to JPL enabled, then it is mandatory that the Job No. and Job Task No. are populated on the rental and sales lines.

On the posting of invoices from the Rental Contract, Job Planning Lines with the Line Type of Billable are created on the Job and Job Ledger Entries are created.

The creation of the Job Planning Lines are from the Sales Invoice lines and are created per line. The Type on the Job Planning Lines will be G/L Account as on the Sales Invoice Lines.

The Description field on the lines created from the Rental Lines will have the Rental Unit description.

NOTE:

If Job Planning Lines have been appended to the Rental Contract, then on the posting of the invoice, no new Job Planning Lines are created.

The Job Planning Lines that were appended will be updated and Job Ledger Entries created.

4.11.5.2. How to Process a Contract Linked to Job Planning Lines

The following example demonstrates the entry and processing of the rental and sales lines on the Rental Contract which was created from a Rental Quote.

The Job No. on the Rental Contract has the Link Rental Cont. to JPL enabled. Therefore when the contract is invoiced, then Job Planning Lines with a Line Type of Billable and Job Ledger will be created.

As the contract originated from a Rental Quote which created Job Planning Lines with a Line Type of Budget, the comparison of Billable to Budget can be done.

The related user help on the Rental Quote is in the help, How to Process Rental Quotes with Job Integration.

On the Rental Quote there were 2 Sales Lines which created Job budget planning lines. As these are time and material lines, they do not flow to the Rental Contract when Make Contract is ran on the quote.

In the example the Sales Lines will be entered, the rental units will be shipped, the contract invoiced and the Job will be reviewed.

NOTE:

When the Job No. on the Rental Contract has the field Link Rental Cont. to JPL disabled then Job Planning



Lines will not be created on the Job when the contract is invoiced.

Click on the link **Rental Contracts - Open 5**

Business Central?

Rental Activities

Rental		Contracts Ship/Return		
Rental Quotes - Open 0	Rental Contracts - Open 5	Shipments Due Today 3	Shipments - Future 0	Returns 1

Specifies the number of rental contracts that have not been fully processed.

Click on the link in cell **No.** with the value **RC00011**

No. ↑	Sell-to Customer No.	Sell-to Customer
RC00001	10000	Adatum Corpo
RC00002	20000	Trey Research
RC00011	10000	Adatum Corpo
RC00012	20000	Trey Research
RC00013	10000	Adatum Corpo

Click on the button **Show more**

Fewer options

Show more

Show more fields

Rental Terms Code	
Deposit Amount	0.00
Contract Total	306.00
Outstanding Amount	306.00

Click on the field **Job No.**

Note that the Job No. on the General tab was carried forward from the quote.

Rental Calendar	RENTAL
Customized Rental C...	No
Original Time Zone	Mountain Standard Time
Current Time Zone	Mountain Standard Time
Time Zone Difference	
Job No.	J00010
Advanced Proforma	<input type="checkbox"/>

Functions Related Fewer options



ODT Rentals Online Help

Click on the cell **Job No.** with the value **J00010**

Note that the Job No. and Job Task No. on the rental lines were carried forward from the quote rental lines.

Related Fewer options					
	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task No.
roup	MONTH-PEND	2	EAST	J00010	RENTAL
	MONTH-PEND	1	EAST	J00010	RENTAL
	MONTH-PEND	1	EAST	J00010	RENTAL

Click on the cell **Type**

Sales Lines			Manage	Line	Fewer options
	Type	No.	Description		
→					

Click on the item **Item** in the list

Sales Lines			Manage	Line	Fewer options
	Type	No.	Description		
→					
G/L Account Item Resource Fixed Asset Charge (Item)					

Click on the cell **No.**

Sales Lines			Manage	Line	Fewer options
	Type	No.	Description	Location Code	
→	Item				

ODT Rentals Online Help

Click on the link in cell **No.** with the value **1005**

Rental Lines | Manage | Line | Functions | Related | Fewer options

Rental Unit No.	Stan... Text Code	Description	Rental Terms Code
→ RU00008	⋮	18 G Brad Nailers Group	MONTH-PEND
RU00008-001			
RU00008-002			

1005 Generator Lubricant PC

1006 Series 10 Sucker Rod Overshot PC

1007 Basket Grapple PC

1008 Spiral Grapple PC

1896-S ATHENS Desk PC

↓ New

Click on the cell **Location Code**

Manage Line Fewer options						
No.	Description	Location Code	Quantity	Job No.	Job Task No.	
1005	Generator Lubricant		0	J00010		

Click on the link in cell **Code** with the value **EAST**

Stan... Text Code	Description	Rental Terms Code	Rental Quantity	Location Code	Job No.	Job Task No.
...	18 G Brad Nailers Group	MONTH-PEND	2	EAST	J00010	RENTAL
	18 G Brad Nailer	MO				
	18 G Brad Nailer	MO				
			Code ↑	Name		
			→ CENTRAL	Central Warehouse		
			EAST	East Warehouse		
			MAIN	Main Warehouse		
			RENTRESERV	Inventory Items Rental Rese		
			SOUTH	South Warehouse		
			TEMP	Temporary Location		
			+ New			
			✓	0	J00010	PC
1005	Generator Lubricant					

Click on the cell **Quantity** with the value **0**

ge	Line	Fewer options				
	Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
05	Generator Lubricant	EAST	0	00010		PCS

ODT Rentals Online Help

Enter the text **2**.

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
Lubricant	EAST	2	J00010	PCS

Click on the cell **Job Task No.**

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
ST	2	J00010		PCS

Click on the lookup button in the cell **Job Task No.**

Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code
EAST	2	J00010		PCS

Review or update the value for Job Task No.

Click on the link in cell **Job Task No.** with the value **SERVICE**

Job Task No.	Description
→ LABOUR	Labour
RENTAL	Rentals
SERVICE	Materials



Click on **Type**

The screenshot shows the 'Sales Lines' tab in the ODT Rentals Online Help interface. The 'Type' dropdown menu is open, and the 'Item' option is highlighted with a red box. The 'No.' field contains the value '1005' and the 'Description' field contains 'Generator Lubr'.

Click on the item **Resource** in the list

The screenshot shows the 'Sales Lines' tab in the ODT Rentals Online Help interface. The 'Type' dropdown menu is open, and the 'Resource' option is highlighted with a red box. The 'No.' field contains the value '1005' and the 'Description' field contains 'Generator Lubr'.

Click on the cell **No.**

The screenshot shows the 'Sales Lines' tab in the ODT Rentals Online Help interface. The 'No.' cell is highlighted with a red box. The 'Type' dropdown menu is open, and the 'Resource' option is selected. The 'No.' field contains the value '1005' and the 'Description' field contains 'Generator Lubricant'.

Click on the link in cell **No.** with the value **LINDA**

The screenshot shows the 'Sales Lines' tab in the ODT Rentals Online Help interface. The 'No.' cell is highlighted with a red box. The 'Type' dropdown menu is open, and the 'Resource' option is selected. The 'No.' field contains the value '1005' and the 'Description' field contains 'Generator Lubricant'. The 'LINDA' link is highlighted with a red box.



ODT Rentals Online Help

Click on the cell **Quantity** with the value **0**

Fewer options						
Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
Generator Lubricant	EAST	2	J00010	SERVICE	PCS	
Linda Martin		0	J00010		HOUR	

Enter the text **2**.

Fewer options						
Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
Generator Lubricant	EAST	2	J00010	SERVICE	PCS	
Linda Martin		2	J00010		HOUR	

Click on the cell **Job Task No.**

Fewer options						
Description	Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code	
Generator Lubricant	EAST	2	J00010	SERVICE	PCS	
Linda Martin		2	J00010		HOUR	

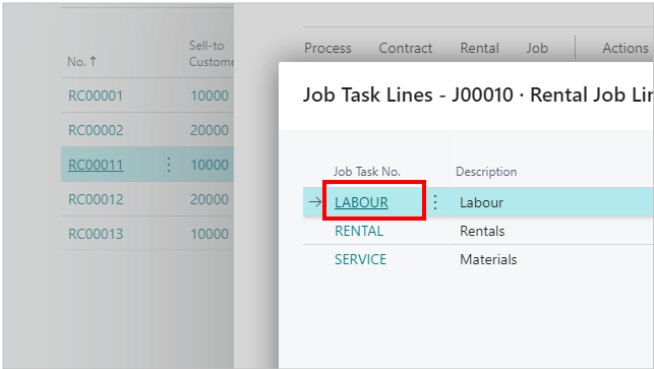
Click on the lookup button in the cell **Job Task No.**

Fewer options						
Location Code	Quantity	Job No.	Job Task No.	Unit of Measure Code		
EAST	2	J00010	SERVICE	PCS		
	2	J00010		HOUR		

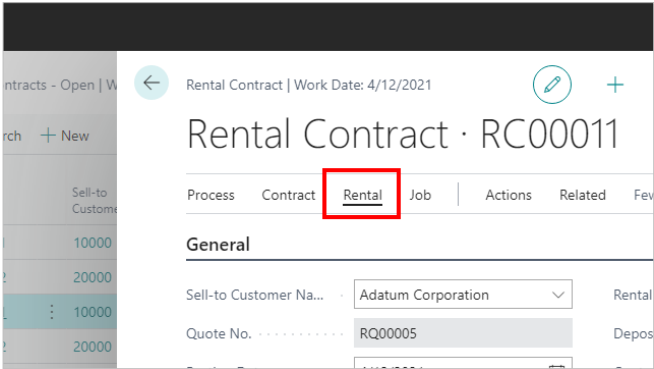


ODT Rentals Online Help

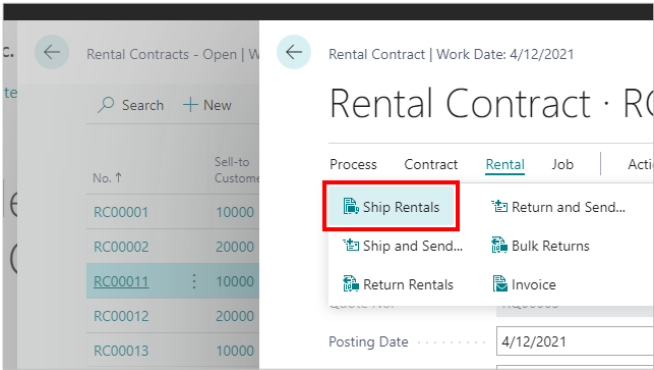
Click on the link in cell **Job Task No.** with the value **LABOUR**



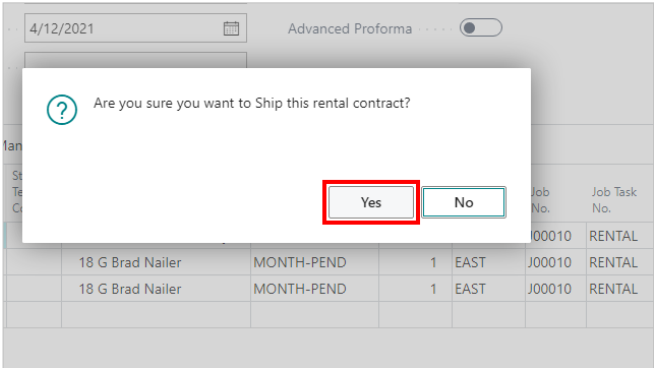
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**





Click on the button **OK**

Advanced Proforma

Shipment Posted Successfully.

OK

Job No.	Job Task No.	Re Te
00010	RENTAL	
G Brad Nailer	MONTH-PEND	1 EAST J00010 RENTAL
G Brad Nailer	MONTH-PEND	1 EAST J00010 RENTAL

Click on the link **Open the date picker for Posting Date**

Contract Rental Job Actions Related Fewer options

General

Customer Na... Adatum Corporation Rental Terms Code

No. RQ00005 Deposit Amount

g Date 4/12/2021 Contract Total

r Date 4/12/2021 Outstanding Amount

ment Date 4/12/2021 Advanced Proforma

nal Document No.

Click on the link **Next**

General

Customer Na... Adatum Corporation Rental Terms Code

No. RQ00005 Deposit Amount

g Date 4/12/2021 Contract Total

r Date April 2021 Outstanding Amount

ment Date Advanced Proforma

al Document No.

Calendar: April 2021

Click on a date in the calendar

Quote No. RQ00005 Deposit Amount

Posting Date 4/12/2021 Contract Total

Order Date May 2021 Outstanding Amount

Document Date Advanced Proforma

External Document No.

Rental Lines

Rental Unit No.	Job task No.	terms Code Alt1	terms Code Alt2	Rental Start Date	No. of Perio...	Re De
→ RU00008	RENTAL			4/12/2021	5/	



Click on the navigation menu item popup **Rental**

The screenshot shows the 'Rental Contract · RC00011' screen. The 'Rental' tab in the top navigation bar is highlighted with a red box. The 'General' section shows 'Sell-to Customer Na...' as 'Adatum Corporation' and 'Quote No.' as 'RQ00005'.

Click on the navigation menu item **Invoice**

The screenshot shows the 'Rental Contract · RC00011' screen. The 'Invoice' tab in the top navigation bar is highlighted with a red box. The 'Posting Date' is '5/11/2021', 'Order Date' is '4/12/2021', and 'Document Date' is '5/11/2021'.

Click on the button **Yes**

The screenshot shows a confirmation dialog box with the text 'Are you sure you want to Invoice this rental contract?'. The 'Yes' button is highlighted with a red box. The background shows a table with rental items.

RE	Job No.	Job Task No.	Unit Price	Alt1 Rental Unit Price
RENTAL			150.00	0.00
RENTAL			150.00	0.00

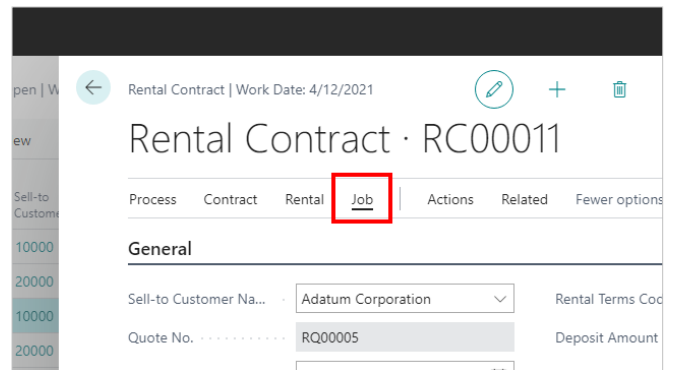
Click on the button **OK**

The screenshot shows a confirmation dialog box with the text 'Invoice Posted Successfully.'. The 'OK' button is highlighted with a red box. The background shows a table with rental items.

Job No.	Job Task No.	Re	Te	Ci
00010	RENTAL			
G Brad Nailer	MONTH-PEND	1	EAST	J00010
G Brad Nailer	MONTH-PEND	1	EAST	J00010

Reviewing the Job

Click on the navigation menu item popup **Job**



Rental Contract | Work Date: 4/12/2021

Rental Contract · RC00011

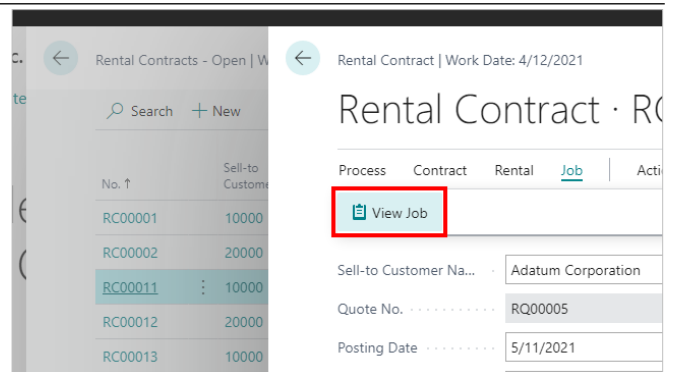
Process Contract Rental **Job** Actions Related Fewer options

General

Sell-to Customer Na... Adatum Corporation Rental Terms Coc

Quote No. RQ00005 Deposit Amount

Click on the navigation menu item **View Job**



Rental Contracts - Open | W Rental Contract | Work Date: 4/12/2021

Rental Contract · RC

Process Contract Rental **Job** Acti

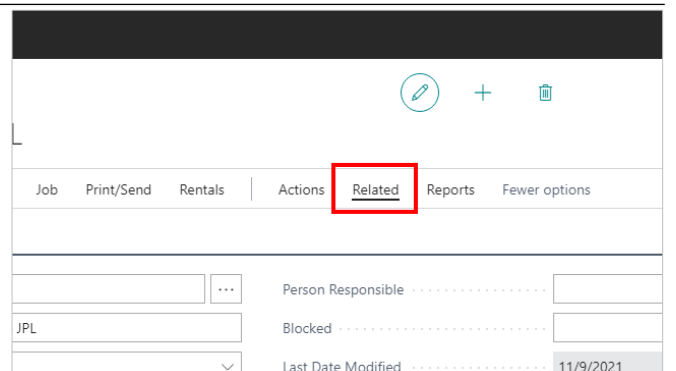
View Job

Sell-to Customer Na... Adatum Corporation

Quote No. RQ00005

Posting Date 5/11/2021

Click on the navigation menu item popup **Related**



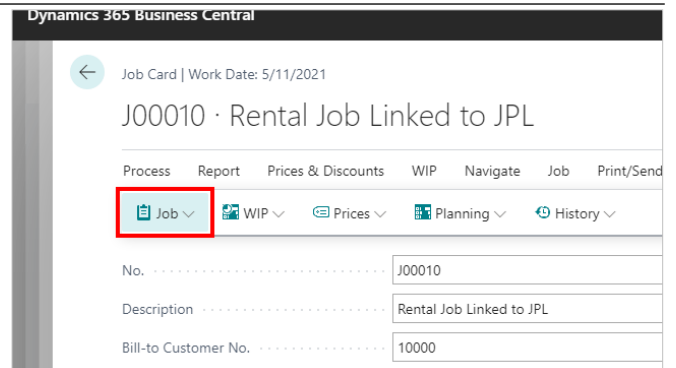
Job Print/Send Rentals Actions **Related** Reports Fewer options

Person Responsible

JPL Blocked

Last Date Modified 11/9/2021

Click on the navigation menu item popup **Job**



Dynamics 365 Business Central

Job Card | Work Date: 5/11/2021

J00010 · Rental Job Linked to JPL

Process Report Prices & Discounts WIP Navigate Job Print/Send

Job WIP Prices Planning History

No. J00010

Description Rental Job Linked to JPL

Bill-to Customer No. 10000

The following picture displays the Task lines on the Job after invoicing the Rental Contract, rental and sales lines.

Tasks

Manage

Line

Fewer options

Job Task No.	Description	Job Task Type	Start Date	End Date	Budget (Total Cost)	Actual (Total Cost)	Budget (Total Price)	Billable (Total Price)	Invoiced (Total Price)
→ LABOUR	Labour	Posting	4/12/2021	5/11/2021	169.40	—	308.00	308.00	308.00
RENTAL	Rentals	Posting	4/12/2021	5/11/2021	—	—	300.00	300.00	300.00
SERVICE	Materials	Posting	4/12/2021	5/11/2021	15.00	—	30.00	30.00	30.00



ODT Rentals Online Help

Click on the cell **Job Task No.** with the value **RENTAL**

Name Aatum Corporation				
Tasks | Manage | Line | Fewer options				
Job Task No.	Description	Job Task Type	Start Date	
LABOUR	Labour	Posting	4/12/2021	
→ RENTAL	Rentals	Posting	4/12/2021	
SERVICE	Materials	Posting	4/12/2021	

Posting

Click on the link in cell **Invoiced (Total Price)** with the value **300.00**

				Job Details - No.
				Job No.
				Resource
				Item
				G/L Account
				Job Details
				Job No.
				Budget Cost
				Resource
				Item

(Total Cost)	Budget (Total Price)	Billable (Total Price)	Invoiced (Total Price)
-	308.00	308.00	308.00
-	300.00	300.00	300.00
-	30.00	30.00	30.00

Show less

Click on the cell **Document No.** with the value **RI00015**

When an invoice is posted from the Rental Contract, the Rental Invoice No. will populated the Document No. on the Job Ledger Entries.

← J00010 - Rental Job Linked to JPL | Work Date: 5/11/2021					
Job Ledger Entries | Search | Process | Entry | Open in Excel					
Posting Date	Entry Type	Document No.	Job No.	Job Task No.	Type
5/11/2021	Sale	RI00015	J00010	RENTAL	G/L
5/11/2021	Sale	RI00015	J00010	RENTAL	G/L

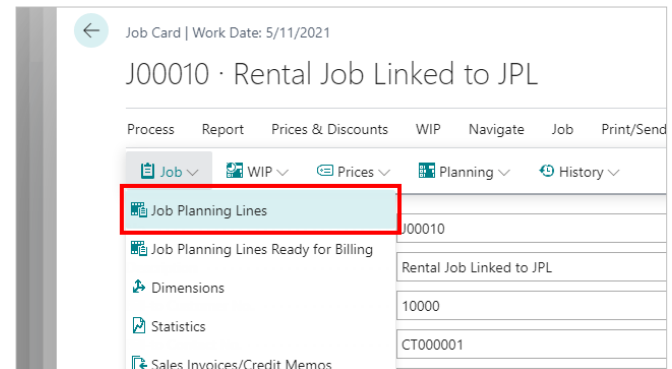
Click on the cell **Description** with the value **18 G Brad Nailer**

The Description field on the Job Ledger Entries created from the invoicing of the Rental Lines on a contract will contain the description from the Rental Line, which by default is the Rental Unit description.

Open in Excel | Actions | Related | Fewer options					
Job Task No.	Type	No.	Description	Location Code	
RENTAL	G/L Account	40100	18 G Brad Nailer	EAST	
RENTAL	G/L Account	40100	18 G Brad Nailer	EAST	

Click on the navigation menu item **Job Planning Lines**

The Job Planning Lines can as well be reviewed from the Task lines to display only the lines related to a selected Task.



The following picture displays the Job Planning Lines for all Tasks.

The lines contain both the Budget lines created from the Rental Quote and the Billable lines from the invoicing of the Rental Contract.

On the Budget lines, the Document No. field contains the Rental Quote and on the Billable lines contain the Rental Contract.

J00010 Rental Job Linked to JPL LABOUR Labour | Work Date: 5/11/2021														✓ Saved	✕
Job Planning Lines															
<div> <div>Search</div> <div>+ New</div> <div>Edit List</div> <div>Delete</div> <div>Process</div> <div>Report</div> <div>Open in Excel</div> <div>Actions</div> <div>Related</div> <div>Reports</div> <div>Fewer options</div> </div>															
Job Task No.†	Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Quantity	Location Code	Unit Cost	Total Cost	Unit Price	Line Amount	Qty. to Transfer to Journal	Invoiced Amount (\$)
→ LABOUR	Budget	4/12/2021	4/12/2021	RQ00005	Resource	LINDA	Linda Martin	2		84.70	169.40	154.00	308.00	0	0.00
LABOUR	Billable	5/11/2021	5/11/2021	RC00011	Resource	LINDA	Linda Martin	2		84.70	169.40	154.00	308.00	0	308.00
RENTAL	Budget	4/12/2021	4/12/2021	RQ00005	G/L Account	40100	18 G Brad Nailer	1	EAST	0.00	0.00	150.00	150.00	0	0.00
RENTAL	Budget	4/12/2021	4/12/2021	RQ00005	G/L Account	40100	18 G Brad Nailer	1	EAST	0.00	0.00	150.00	150.00	0	0.00
RENTAL	Billable	5/11/2021	5/11/2021	RC00011	G/L Account	40100	18 G Brad Nailer	1	EAST	0.00	0.00	150.00	150.00	0	150.00
RENTAL	Billable	5/11/2021	5/11/2021	RC00011	G/L Account	40100	18 G Brad Nailer	1	EAST	0.00	0.00	150.00	150.00	0	150.00
SERVICE	Budget	4/12/2021	4/12/2021	RQ00005	Item	1005	Generator Lubricant	2	EAST	7.50	15.00	15.00	30.00	0	0.00
SERVICE	Billable	5/11/2021	5/11/2021	RC00011	Item	1005	Generator Lubricant	2	EAST	7.50	15.00	15.00	30.00	0	30.00

4.11.6. How to Append Job Planning Lines to a Rental Contract

4.11.6.1. Overview

The processing of the Rentals Job Integration, Appending Job Planning Lines to a Rental Contract consists of:

- The Job creation along with the Job Planning Lines
- Linking a Rental Contract to the Job, which is mandatory for appending the Job Planning Lines to a contract
- Appending the Job Planning Lines Ready for Billing to the Rental Contract, Sales Lines
- Invoicing the Rental Contract sales lines, which will update the Job Planning Lines and create Job Ledger Entries Alternatively, if a Rental Contract does not exist, then when appending Job Planning Lines, the Create New Rental Contract can be enabled, which creates a new contract and appends the Job Planning Lines.

NOTE:

When planning lines with items are appended to contracts and invoiced, the Usage still has to be processed from the Job, if the field, Apply Usage Link, is enabled on the Job card.

For visibility and confirmation of the appended job planning lines to the sales lines on a Rental Contract, the Job No., Job Task No. and Job Planning Line No. fields can be added to the contract sales lines using Personalize.

NOTE:

When planning lines contain items, the invoicing of the sales lines on the contract follows the standard Job processing, the same as when posting an invoice from the Job. Meaning that the Usage is still processed from the Job.

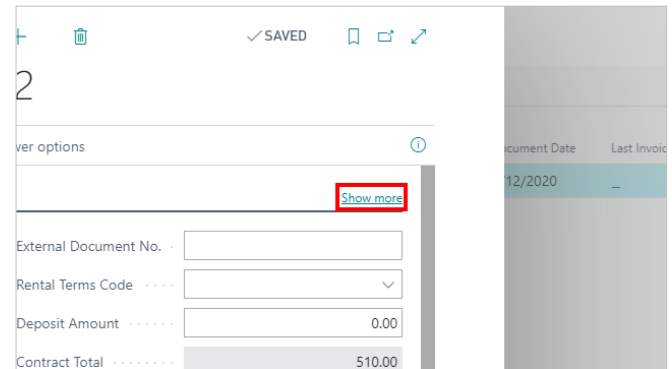
In the following example, the Job No, Job Task No. and Job Planning Line No, have been added to the Rental Contract, Sales Lines.

A Job with Job Planning Lines, and a Rental Contract have been created.

4.11.6.2. How to Link a Rental Contract to a Job

The following demonstrates the linking of a Rental Contract to a Job.
This is mandatory for appending Job Planning Lines to a Rental Contract.

Click on the button **Show more**



2

✓ SAVED

over options

12/2020

External Document No.

Rental Terms Code

Deposit Amount 0.00

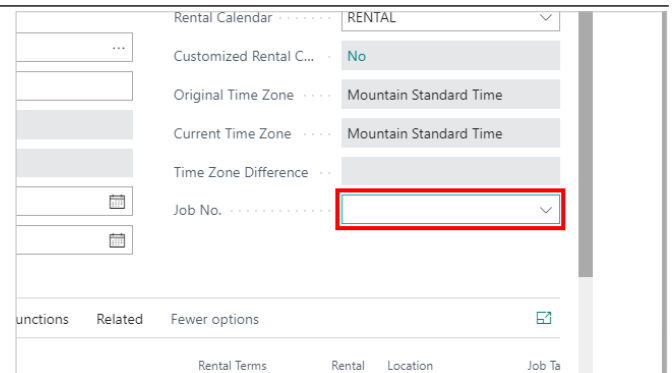
Contract Total 510.00

Show more

Click on the field **Job No.**

When a Job No. is selected on a Rental Contract, the settings related to Dimensions on Jobs Setup will be applied to the Rental Contract, Dimensions.

Review the Setups for Job Integration help for additional information.



Rental Calendar RENTAL

Customized Rental C... .. No

Original Time Zone Mountain Standard Time

Current Time Zone Mountain Standard Time

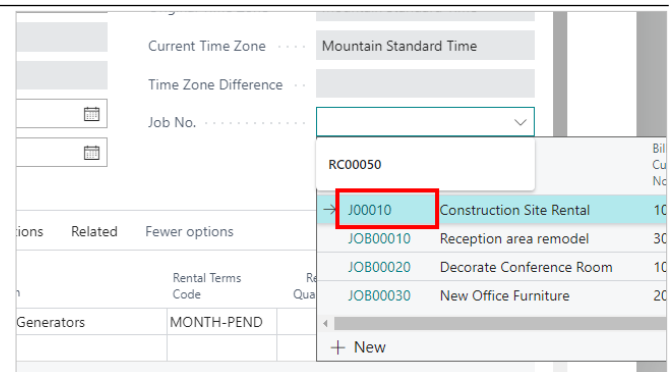
Time Zone Difference ..

Job No.

Functions Related Fewer options

Rental Terms Rental Location Job Ta

Click on the link in cell **No.** with the value **J00010**



Current Time Zone Mountain Standard Time

Time Zone Difference ..

Job No.

RC00050

J00010 Construction Site Rental 10

JOB00010 Reception area remodel 30

JOB00020 Decorate Conference Room 10

JOB00030 New Office Furniture 20

Generators MONTH-PEND

+ New

4.11.6.3. How to Append Job Planning Lines to a Contract

The following demonstrates the appending of multiple Job Planning Lines to a Rental Contract, which has the same customer as the Job.



Click on the navigation menu item popup **Navigate**

Dynamics 365 Business Central

← JOB CARD | WORK DATE: 4/12/2020

J00010 · Construction Site Rental

Process Report Prices WIP **Navigate** Job Print/Send Actions

General

No. J00010

Description Construction Site Rental

Bill-to Customer No. 10000

Click on the navigation menu item **Job Planning Lines Ready for Billing**

NOTE:

The Job Planning Lines can as well be appended from the Job Planning Lines.

Dynamics 365 Business Central

← JOB CARD | WORK DATE: 4/12/2020

J00010 · Construction Site Rental

Process Report Prices WIP **Navigate** Job Print/Send Actions

Job Planning Lines Job Planning ...dy for Billing

No. J00010

Description Construction Site Rental

Bill-to Customer No. 10000

Click on the cell **Job No.** with the value **J00010**

Select the line or lines that are to be appended to a Rental Contract.

← JOB PLANNING LINES READY FOR BILLING | WORK DATE: 4/12/2020

Search Navigation **Open in Excel** Navigate Fewer options

Job No. ↑	Job Task No.	Line Type	Planning Date ↑	Planned Delivery Date	Document No. ↑
J00010	1020	Both Budge...	4/12/2020	4/12/2020	
J00010	1110	Both Budge...	4/12/2020	4/12/2020	
J00010	1110	Both Budge...	5/12/2020	5/12/2020	

Click on the navigation menu item popup **Navigation**

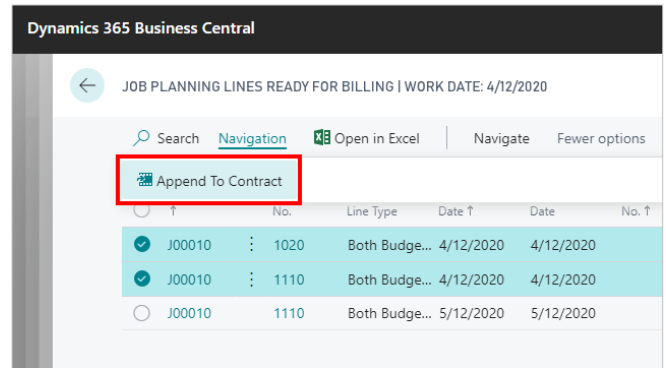
Dynamics 365 Business Central

← JOB PLANNING LINES READY FOR BILLING | WORK DATE: 4/12/2020

Search **Navigation** **Open in Excel** Navigate Fewer options

Job No. ↑	Job Task No.	Line Type	Planning Date ↑	Planned Delivery Date	Document No. ↑
<input checked="" type="radio"/> J00010	1020	Both Budge...	4/12/2020	4/12/2020	
<input checked="" type="radio"/> J00010	1110	Both Budge...	4/12/2020	4/12/2020	
<input type="radio"/> J00010	1110	Both Budge...	5/12/2020	5/12/2020	

Click on the link **Append To Contract**



Dynamics 365 Business Central

← JOB PLANNING LINES READY FOR BILLING | WORK DATE: 4/12/2020

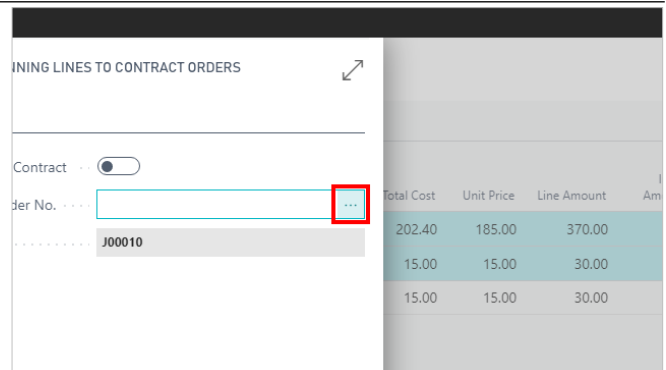
Search Navigation Open in Excel Navigate Fewer options

Append To Contract

No.	Line Type	Date ↑	Date	No. ↑
✓ J00010 : 1020	Both Budge...	4/12/2020	4/12/2020	
✓ J00010 : 1110	Both Budge...	4/12/2020	4/12/2020	
○ J00010 : 1110	Both Budge...	5/12/2020	5/12/2020	

Click on the lookup button **Rental Contract Order No.**

Alternatively, if a Rental Contract does not exist, then when appending Job Planning Lines, the Create New Rental Contract can be selected which creates a new contract and appends the Job Planning Lines.



APPENDING LINES TO CONTRACT ORDERS

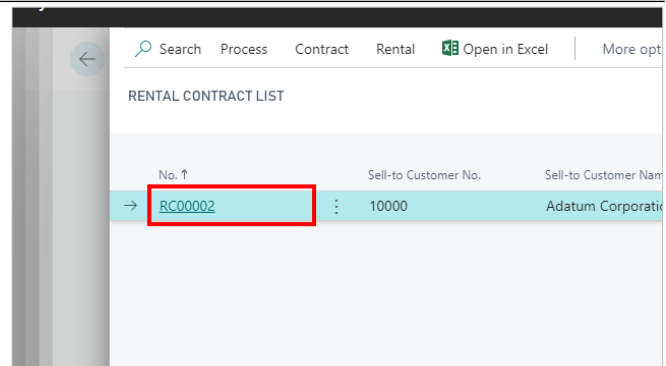
Contract :

Order No. : J00010

Total Cost	Unit Price	Line Amount	Am
202.40	185.00	370.00	
15.00	15.00	30.00	
15.00	15.00	30.00	

Click on the link in cell **No.** with the value **RC00002**

The list will contain only the Rental Contracts that have been linked to the Job. Select the Rental Contract that the planning lines are to be appended to.

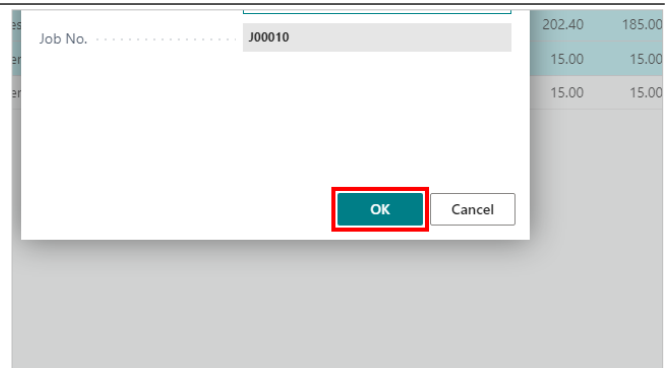


← Search Process Contract Rental Open in Excel More opt

RENTAL CONTRACT LIST

No. ↑	Sell-to Customer No.	Sell-to Customer Name
→ RC00002	10000	Adatum Corporati

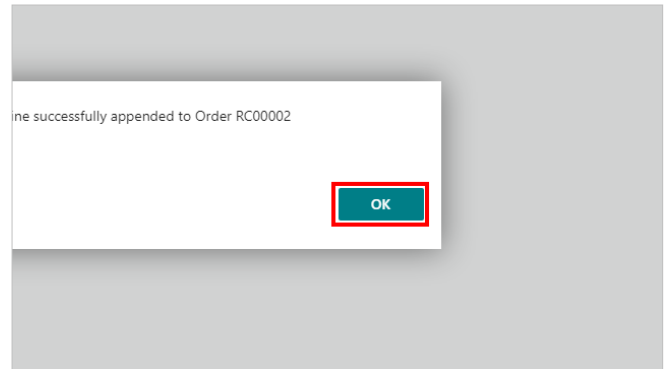
Click on the button **OK**



Job No. : J00010

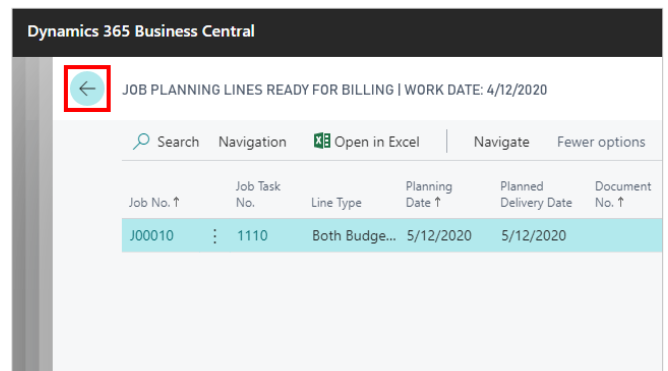
OK Cancel

Click on the button **OK**

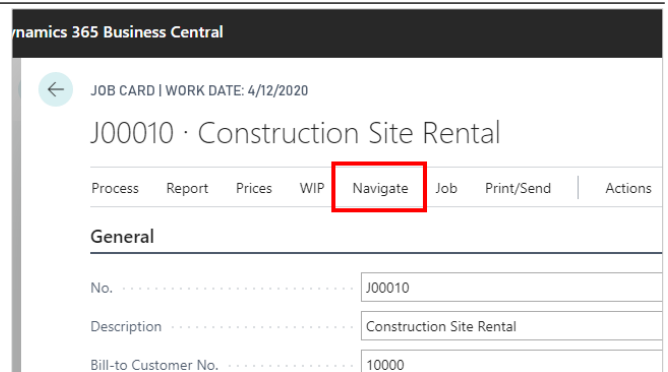


Once the planning lines have been appended to a Rental Contract, they will no longer be shown in the Job Planning Lines Ready for Billing.

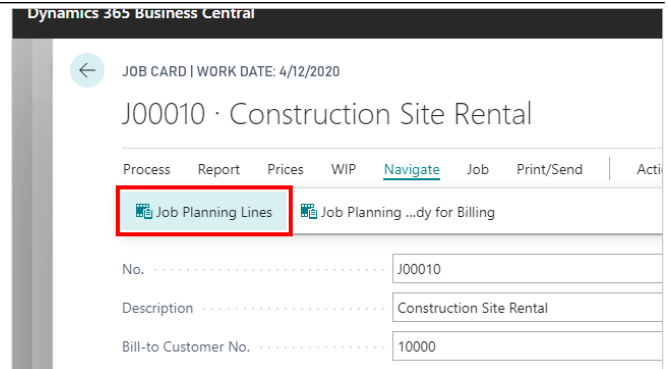
Click on the back button



Click on the link **Navigate**

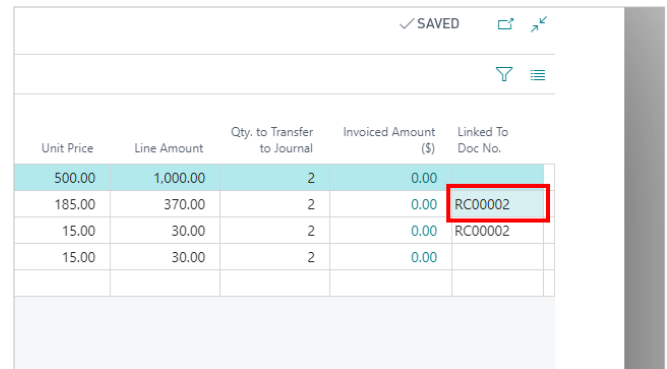


Click on the navigation menu item **Job Planning Lines**



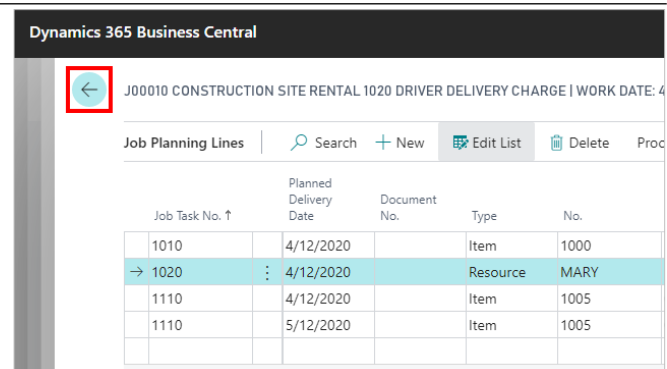
Click on the cell **Linked To Doc No.** with the value **RC00002**

Note that in the Link To Doc No. field, the Rental Contract No. is displayed. If the Linked To Doc Line No. field was added to the line, then the contract Sales Line No. would be displayed.



Unit Price	Line Amount	Qty. to Transfer to Journal	Invoiced Amount (\$)	Linked To Doc No.
500.00	1,000.00	2	0.00	
185.00	370.00	2	0.00	RC00002
15.00	30.00	2	0.00	RC00002
15.00	30.00	2	0.00	

Click on the back button



Dynamics 365 Business Central

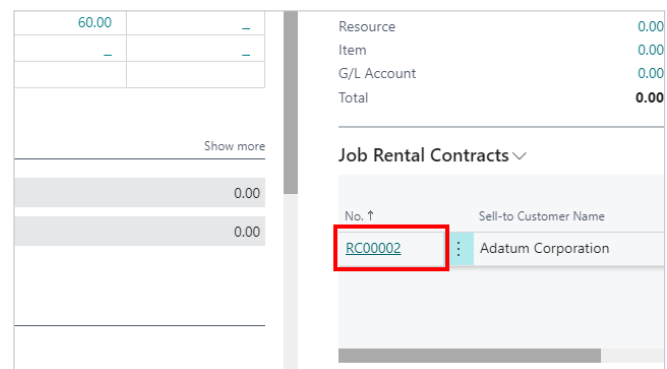
J00010 CONSTRUCTION SITE RENTAL 1020 DRIVER DELIVERY CHARGE | WORK DATE: 4

Job Planning Lines | Search | + New | Edit List | Delete | Proc

Job Task No. ↑	Planned Delivery Date	Document No.	Type	No.
1010	4/12/2020		Item	1000
→ 1020	4/12/2020		Resource	MARY
1110	4/12/2020		Item	1005
1110	5/12/2020		Item	1005

The following demonstrates opening and reviewing the Rental Contract, Sales Lines appended directly from the Job.

Click on the link in cell **No.** with the value **RC00002**



60.00	-
-	-
Show more	
0.00	
0.00	

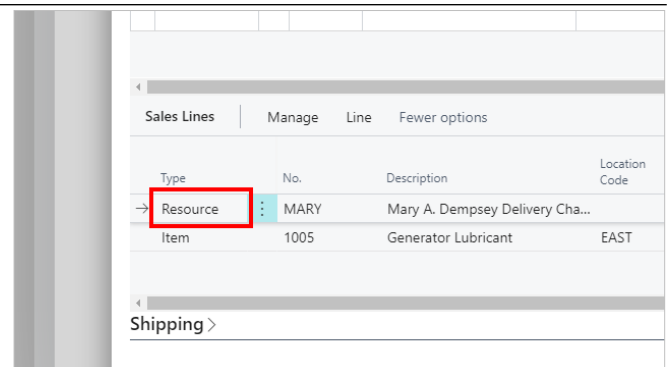
Resource 0.00
Item 0.00
G/L Account 0.00
Total 0.00

Job Rental Contracts ▾

No. ↑	Sell-to Customer Name
RC00002	Adatum Corporation

Click on the cell **Type** with the value **Resource**

Note that both of the selected Job Planning Lines have populated the Sales Lines.



Sales Lines | Manage | Line | Fewer options

Type	No.	Description	Location Code
→ Resource	MARY	Mary A. Dempsey Delivery Cha...	
Item	1005	Generator Lubricant	EAST

Shipping >

IMPORTANT INFORMATION

When planning lines have been appended to an open contract, when opening the contract all sales lines are displayed in view mode only. The appended lines cannot be edited.

To add new sales lines, the Manage, New Line must be used, when there are no existing sales lines prior to appending from a Job. When an appended line is selected, then all sales lines revert to view mode only. Selecting a line entered directly on the contract, will then change that line to edit mode.

Click on the button **Close**

Tax	%	Code	Ship	Shipped	Invoice	Invoiced
381.10	0		2	0	2	0
30.60	0		2	0	2	0

Close

4.11.6.4. Invoicing the Rental Contract Sales Lines Appended

The following demonstrates the invoicing of the sales lines on the contract.

Click on the field **Posting Date**

Actions | Navigate | Fewer options

Adatum Corporation

4/12/2020

4/12/2020

4/12/2020

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/12/2020

Rental Contract · RC00002

Process | Contract | Rental | Actions | Navigate | Fewer options

General

Sell-to Customer Name Adatum Corporation

Quote No.

Posting Date 4/12/2020

Click on the navigation menu item **Invoice**

✎ + 🗑

Fewer options

Return and Send... Bulk Returns Invoice Invoice and Print Invoice

Adatum Corporation

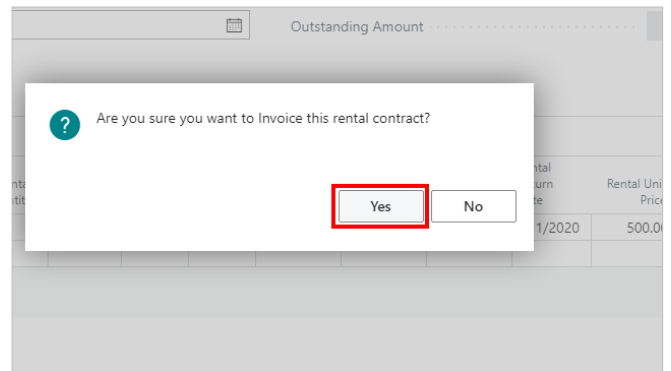
2/2020

External Document No.

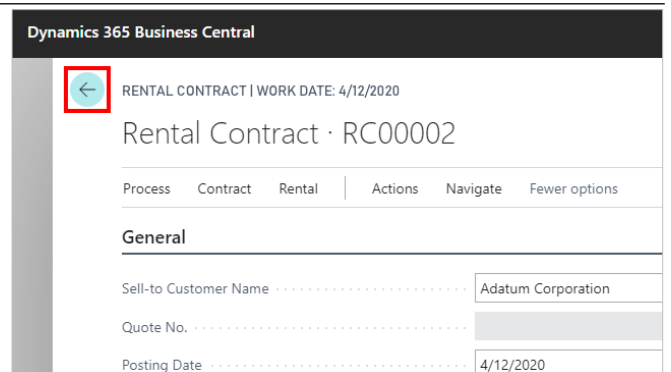
Rental Terms Code

Deposit Amount

Click on the button **Yes**



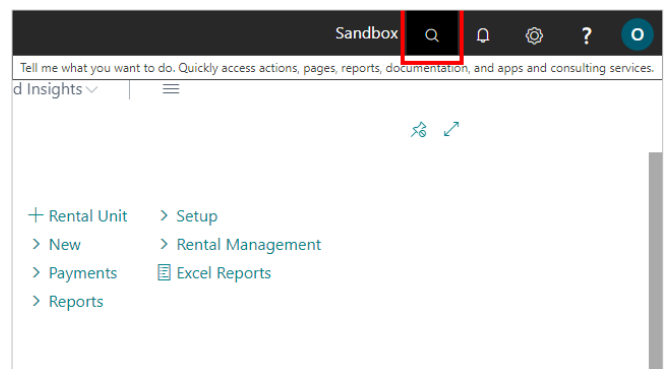
Click on the back button



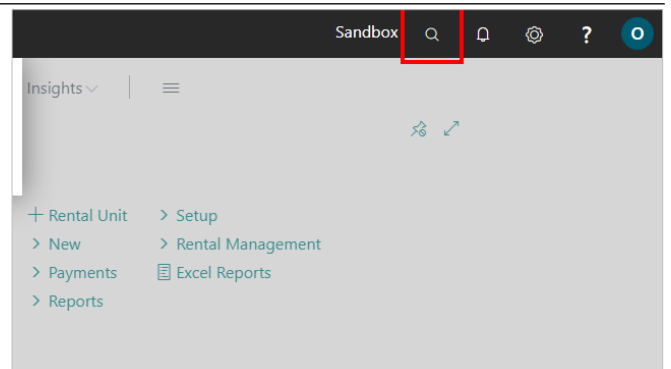
4.11.6.5. Reviewing the Job and Ledger Entries after Invoicing

The following demonstrates the reviewing of the Job after the appended lines were invoiced.

Click on the link **Search icon**

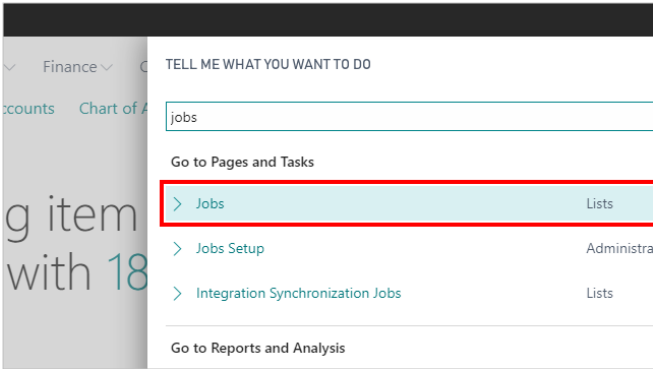


Enter **Search icon**.

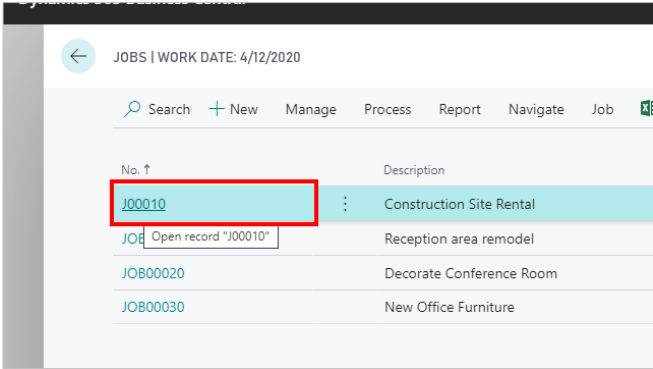




Click on **Jobs Lists**



Click on the link in cell **No.** with the value **J00010**



Note that the planning lines appended and invoiced now have the Billable (Invoiced Price) field populated.

Click on the link in cell **Billable (Invoiced Price)** with the value **30.00**

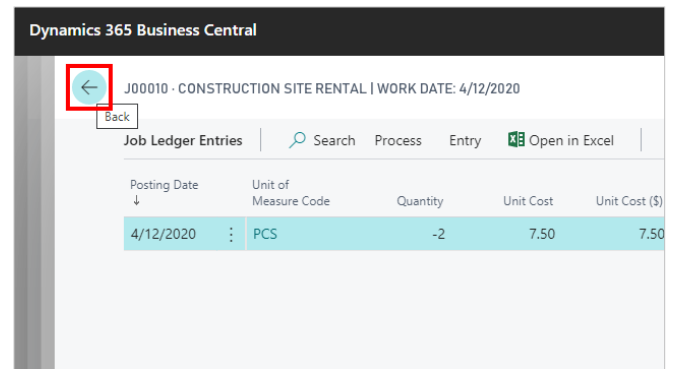
Cost)	Actual (Total Cost)	Billable (Total Price)	Billable (Invoiced Price)	BUDGET COST
-	-	-	-	Resource
00.00	-	-	-	Item
02.40	-	370.00	370.00	G/L Account
-	-	-	-	Total
-	-	-	-	ACTUAL COST
30.00	-	60.00	30.00	Resource
-	-	-	-	Item
-	-	-	-	G/L Account
-	-	-	-	Total
Show more				BILLABLE PRICE
				Resource
				Item
				G/L Account

Click on the cell **Posting Date** with the value **4/12/2020**

Note that the Job Ledger Entry was created for the planning line.

Posting Date	Unit of Measure Code	Quantity	Unit Cost	Unit Cost (\$)
4/12/2020	PCS	-2	7.50	7.50

Click on the back button



4.12. Links, Notes and Attachments

4.12.1. How to Add Links Notes and Attachments to Rental Documents

4.12.1.1. Overview

Links, Notes and Attachments can be added to the Rental Quote and Rental Contract document headers in the fact box at the right.

The fact box at the right on the rental documents, on the Details option, displays Attachments, where documents can be attached to the document header.

The Notes section is displayed under Attachments.

The Links section must be added using Personalize and will be displayed under Attachments.

In addition, when a Rental Unit with an attachment that has the Flow thru to Rental Trx checked is added to the Rental Lines, the attachment can be accessed by selecting the line the unit is on, then selecting the Line menu option, then Attachments.

If the file attachment is to flow through to the rental documents, there are 3 fields for specifying which rental documents the attachment is to flow through to.

To learn about adding Notes, Links and Attachments to Rental Units, see ODT Rental Online Help, Setup Rentals, Setup Rental Units, How to Attach Documents Links and Notes.

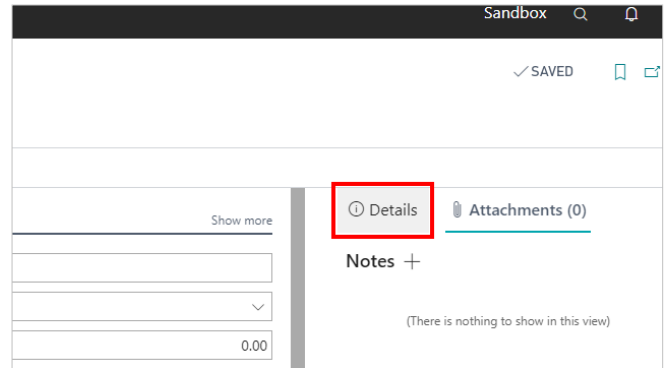
Attachments can as well be added to the rental line selected, using the same menu option.

4.12.1.2. How to Add Attachments to a Rental Documents

The following demonstrates the addition of a file attachment to a Rental Contract.

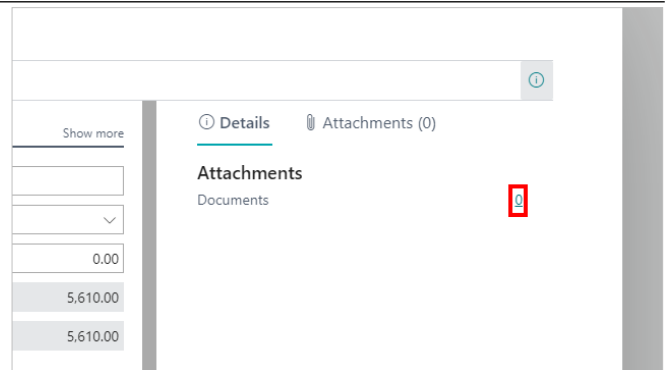
The same steps apply to adding a file attachment to a Rental Quote. When added to a quote and Make Contract is ran, the attachment will flow through to the Rental Contract.

Click on the button ☐ **Details**



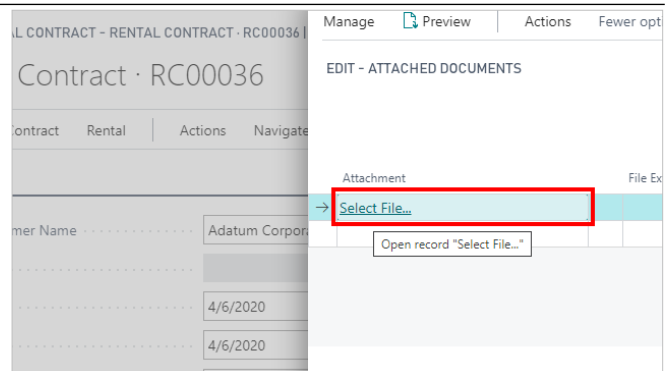
The screenshot shows a web application interface with a top bar labeled 'Sandbox'. Below the bar, there's a 'SAVED' status and some icons. The main content area has a sidebar on the left with a 'Show more' link. The right side of the sidebar has a 'Details' button (circled in red) and an 'Attachments (0)' link. Below these, there's a 'Notes +' section with a message: '(There is nothing to show in this view)'. The bottom of the sidebar shows a table with a single row containing the value '0.00'.

Click on the field **Documents**



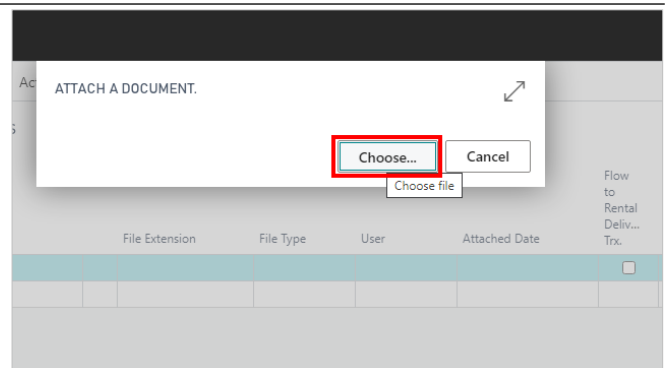
The screenshot shows a web application interface with a top bar labeled 'Sandbox'. Below the bar, there's a 'SAVED' status and some icons. The main content area has a sidebar on the left with a 'Show more' link. The right side of the sidebar has a 'Details' button and an 'Attachments (0)' link. Below these, there's a 'Documents' field (highlighted with a red box) and a 'Notes +' section with a message: '(There is nothing to show in this view)'. The bottom of the sidebar shows a table with a single row containing the value '0.00'.

Click on the link in cell **Attachment** with the value **Select File...**



The screenshot shows a web application interface with a top bar labeled 'Sandbox'. Below the bar, there's a 'SAVED' status and some icons. The main content area has a sidebar on the left with a 'Show more' link. The right side of the sidebar has a 'Details' button and an 'Attachments (0)' link. Below these, there's a 'Documents' field and a 'Notes +' section with a message: '(There is nothing to show in this view)'. The bottom of the sidebar shows a table with a single row containing the value '0.00'.

Click on the field **Choose**

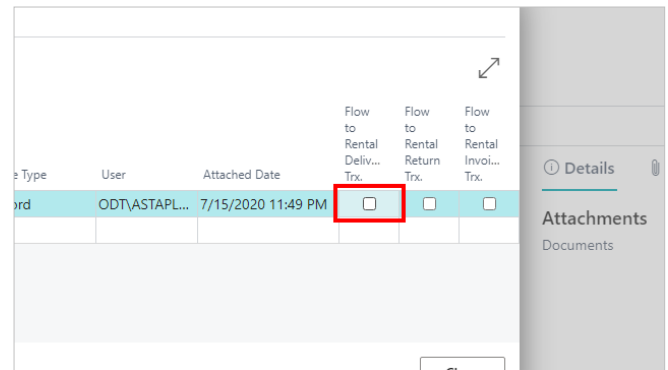


The screenshot shows a web application interface with a top bar labeled 'Sandbox'. Below the bar, there's a 'SAVED' status and some icons. The main content area has a sidebar on the left with a 'Show more' link. The right side of the sidebar has a 'Details' button and an 'Attachments (0)' link. Below these, there's a 'Documents' field and a 'Notes +' section with a message: '(There is nothing to show in this view)'. The bottom of the sidebar shows a table with a single row containing the value '0.00'.

Browse to the location where the file is located, select the file and then click on Open.

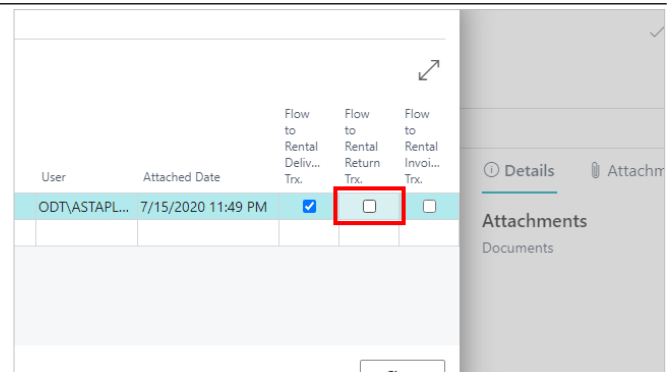
Select the rental documents that the file attachment is to flow through to.

Click on **Flow to Rental Delivery Trx.**



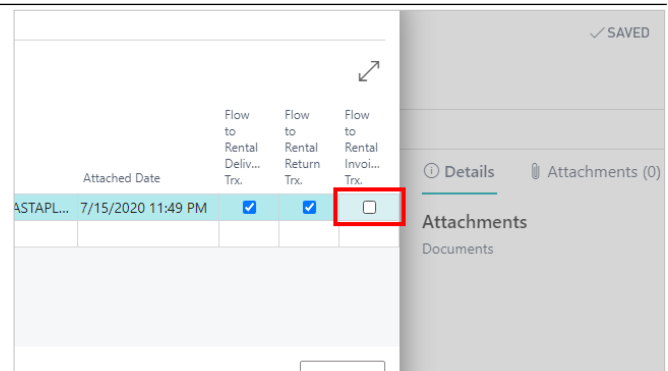
The screenshot shows a table with columns: Type, User, Attached Date, Flow to Rental Deliv... Trx., Flow to Rental Return Trx., and Flow to Rental Invoi... Trx. The first row is highlighted in blue and contains the text 'ord', 'ODT\ASTAPL...', and '7/15/2020 11:49 PM'. The 'Flow to Rental Deliv... Trx.' checkbox is checked, and the 'Flow to Rental Return Trx.' checkbox is highlighted with a red box. The 'Flow to Rental Invoi... Trx.' checkbox is also present. On the right side, there is a sidebar with 'Details' and 'Attachments' sections.

Click on **Flow to Rental Return Trx.**



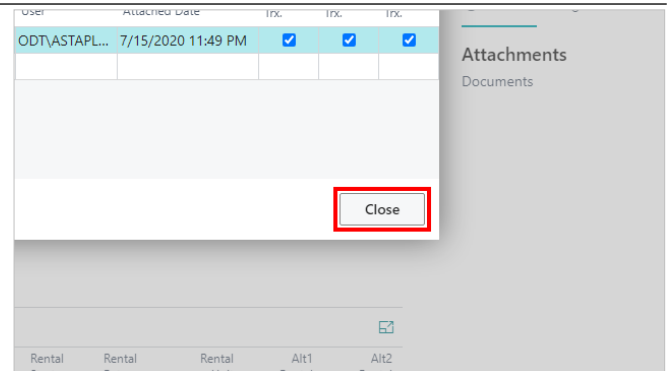
The screenshot shows the same table as the previous one, but now the 'Flow to Rental Return Trx.' checkbox is checked, and the 'Flow to Rental Invoi... Trx.' checkbox is highlighted with a red box. The 'Flow to Rental Deliv... Trx.' checkbox is also checked. The sidebar on the right remains the same.

Click on **Flow to Rental Invoice Trx.**



The screenshot shows the same table as the previous ones, but now the 'Flow to Rental Invoice Trx.' checkbox is checked, and the 'Flow to Rental Deliv... Trx.' checkbox is highlighted with a red box. The 'Flow to Rental Return Trx.' checkbox is also checked. The sidebar on the right now shows 'Attachments (0)'.

Click on the button **Close**



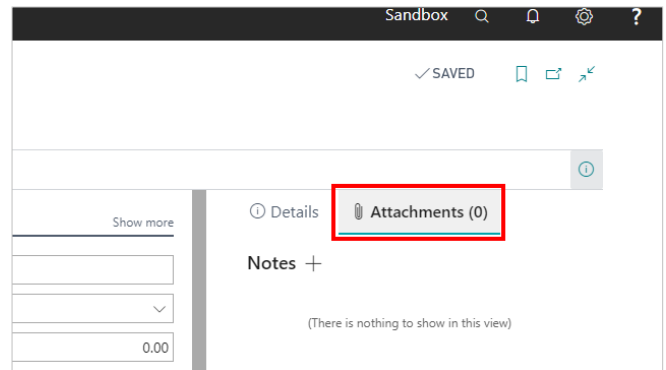
The screenshot shows the same table as the previous ones, but now the 'Close' button is highlighted with a red box. The 'Flow to Rental Deliv... Trx.', 'Flow to Rental Return Trx.', and 'Flow to Rental Invoice Trx.' checkboxes are all checked. The sidebar on the right remains the same.

4.12.1.3. How to Add Notes to a Rental Documents

The following demonstrates the adding of a Note to a Rental Contract.

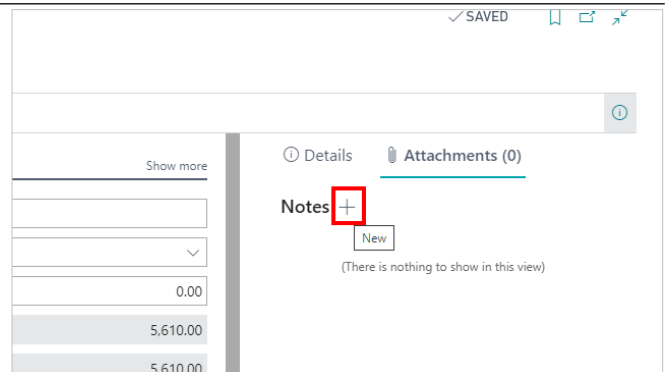
The same steps apply to adding a Note to a Rental Quote. When added to a quote and Make Contract is ran, the Note will flow through to the Rental Contract.

Click on the button ☐ **Attachments (0)**



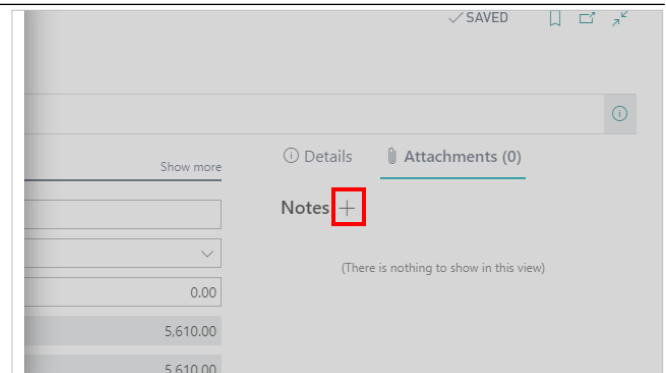
The screenshot shows a web application interface with a top navigation bar containing 'Sandbox', a search icon, a bell icon, a settings icon, and a help icon. Below the navigation bar, there's a 'SAVED' status and some icons. The main content area has a sidebar on the left with a 'Show more' link and a table with columns for 'Rental', 'Location', 'Risk', 'Rental Terms', 'Rental Start', 'Rental Return', 'Rental Unit', and 'Alt1'. The main area has tabs for 'Details' and 'Attachments (0)'. The 'Attachments (0)' tab is highlighted with a red box. Below the tabs, there's a 'Notes +' button and a message '(There is nothing to show in this view)'.

Click on the link **New**



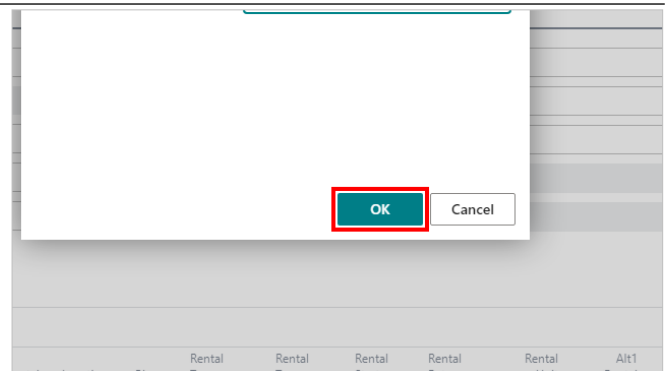
The screenshot shows the same web application interface as before. The 'Attachments (0)' tab is still highlighted. The 'Notes +' button is now highlighted with a red box, and a 'New' button has appeared below it. The message '(There is nothing to show in this view)' is still present.

Enter the text **On return from being on rent, a maintenance inspection is to be performed.**



The screenshot shows the same web application interface as before. The 'Attachments (0)' tab is still highlighted. The 'Notes +' button is still highlighted with a red box, and the 'New' button is still present. The message '(There is nothing to show in this view)' is still present.

Click on the button **OK**



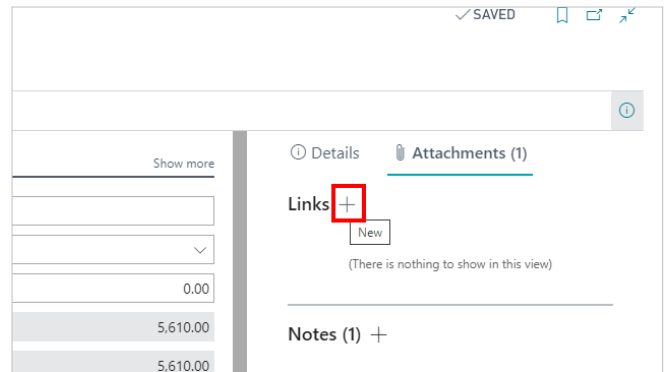
The screenshot shows a modal dialog box with a red border. It contains a large text area for entering notes. At the bottom right, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box. The background of the web application is dimmed.

4.12.1.4. How to Add Links to a Rental Documents

The following demonstrates the adding of a Link to a Rental Contract.

The same steps apply to adding a Link to a Rental Quote. When added to a quote and Make Contract is ran, the Link will flow through to the Rental Contract.

Click on the link **New**



SAVED

Details Attachments (1)

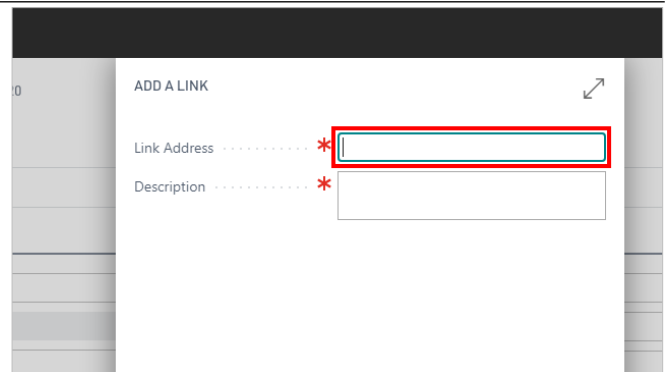
Links **+**

New

(There is nothing to show in this view)

Notes (1) +

Click on the field **Link Address**

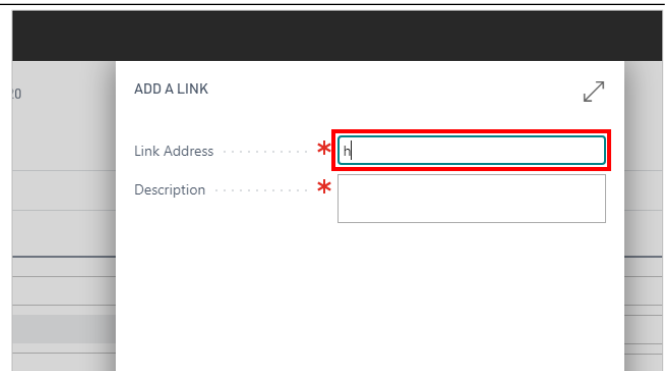


ADD A LINK

Link Address *

Description *

Enter **Link Address**.



ADD A LINK

Link Address *

Description *

Click on the textarea **Description, (Blank)**



ADD A LINK

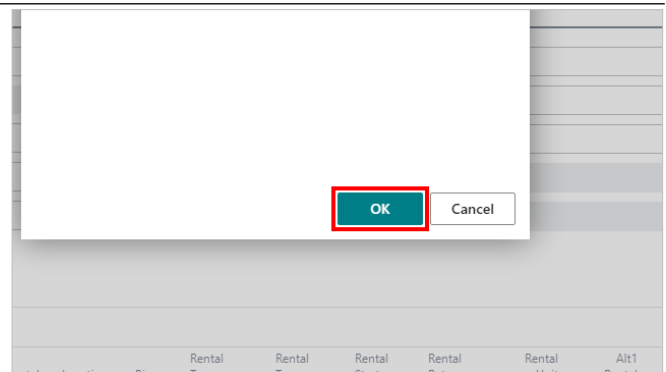
Link Address *

Description *

Enter the text **Open Door Technology website**.



Click on the button **OK**

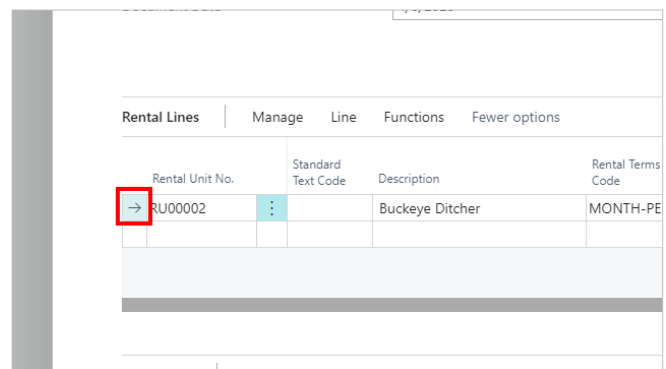


4.12.1.5. How to Add an Attachment to a Selected Rental Line

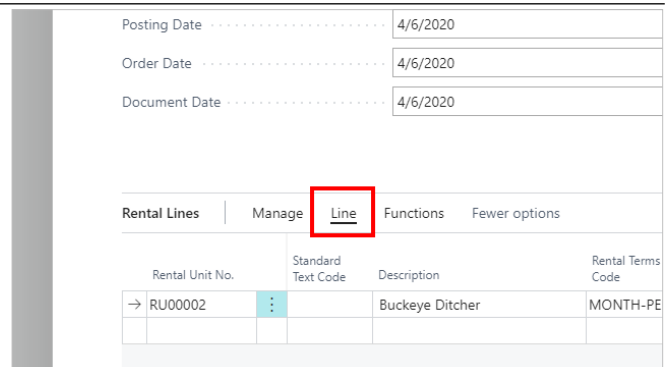
The following demonstrates the addition of a file attachment to a Rental Line.

The same steps apply to adding a file attachment to a Rental Line on a Rental Quote. When added to a quote and Make Contract is ran, the attachment will flow through to the Rental Line on the Rental Contract.

Click on **Rental Unit No. = RU00002, Rental Terms Code = MONTH-PEND, Rental Quantity = 1**



Click on the navigation menu item popup **Line**





ODT Rentals Online Help

Click on the navigation menu item **Attachments**

Contract Total
Outstanding Amount
options
Periodic Usage Entries Additional Notes Attachments
Item Tracking Lines Dimensions Add a file as an attachment. You can attach

Click on the link in cell **Attachment** with the value **RU Attachment 1**

Contract · RC00036
contract Rental Actions Navigate
Attachment File Ex
RU Attachment 1 : docx
Select File... Open record "RU A
Adatum Corpor
4/6/2020
4/6/2020

As the Rental Unit selected on the Rental Line has an attachment with the Flow to Rental Trx field checked, the attachment has flow to the Rental Line for the unit. Select the rental documents that the file attachment is to flow through to.

Click on **Flow to Rental Delivery Trx.**

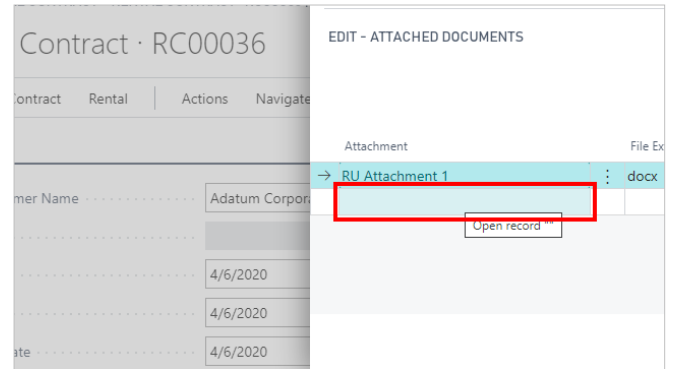
Flow to Rental Delivery Trx Flow to Rental Return Trx Flow to Rental Invo... Trx
ord ODT\ASTAPL... 7/15/2020 11:42 PM ☒ ☐ ☐
Details
Links (1) +
Open Door Technol
https://www.opend
Notes (1) +

Click on **Flow to Rental Invoice Trx.**

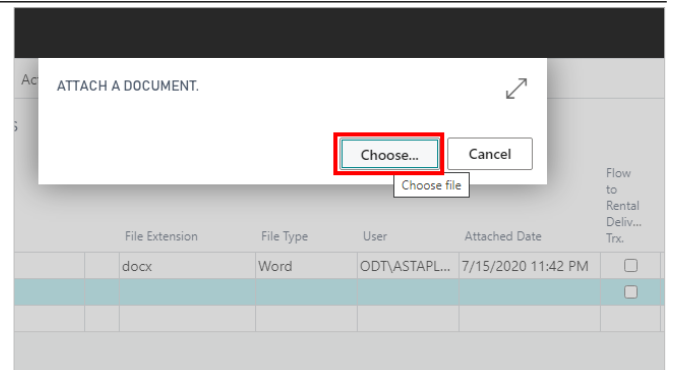
Flow to Rental Delivery Trx Flow to Rental Return Trx Flow to Rental Invo... Trx
ASTAPL... 7/15/2020 11:42 PM ☒ ☐ ☒
Details Attachments (1)
Links (1) +
Open Door Technology website
https://www.opendoorerp.com
Notes (1) +

ODT Rentals Online Help

Click on the link in cell **Attachment** with the value



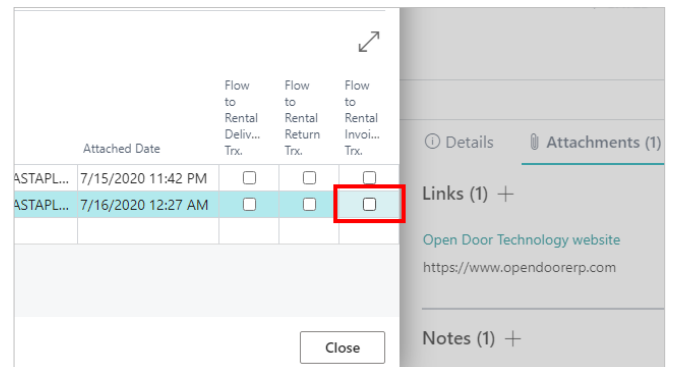
Click on the field **Choose**



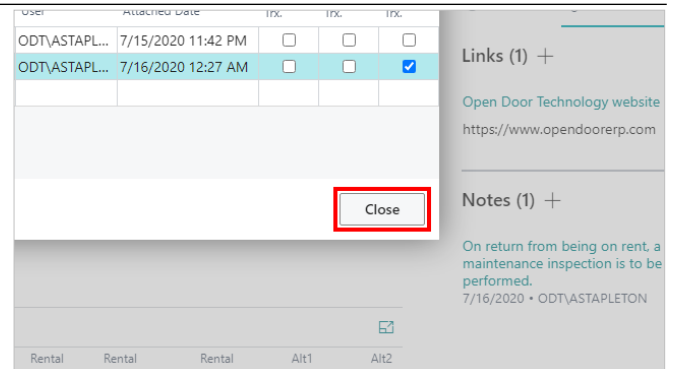
Browse to the location where the file is located, select the file and then click on Open.

Select the rental documents that the file attachment is to flow through to.

Click on **Flow to Rental Invoice Trx.**



Click on the button **Close**



4.13.Rental Accruals and Deferrals

4.13.1. Rental Accruals and Deferrals Overview

4.13.1.1. Overview

Some organizations accrue, and or defer the rental revenue when the rental period spans an accounting period end, so that the revenue is reported in the accounting period in which it is earned.

ODT Rentals provides a Rental Accrual Journal for automatically calculating accrual and deferral rental revenue amounts. A Rental Accrual Register provides the ability to review the Accrual Ledger Entries created when posting the journal.

The calculation of deferred rental is optional. Should an organization want to calculate deferred rental revenue, then on Rental Management Setup, the Calculate Deferred Revenue field must be enabled.

The Rental Accrual Journal is an automatically reversing journal. The reversing entries for the current period accruals and deferrals are created when the accrual journal calculation is ran and populates the same journal as the accrued and deferred revenue are on.

An organization can chose whether the Posting Date of the reversing entries is to be the first day or the last day of the subsequent accounting period.

Upon posting of the journal a Rental Accrual Register and Rental Accrual Ledger Entries are created, in addition to the G/L Entries.

Rental revenue accruals are normally calculated for rental terms that have an Invoicing Type of End or Periodic End. Meaning that the invoicing occurs at the end of the rental when the units are returned, or at the end of each rental period.

Rental revenue deferrals are normally calculated for rental terms that have an Invoicing Type of Start or Periodic Start.

However, there can be scenarios where accruals are calculated for rental terms that have an Invoicing Type of Start or Periodic Start. Likewise there can be scenarios where deferrals are calculated for rental terms that have an Invocing Type of End or Periodic End.

The rental revenue accrual and deferral amounts are calculated for the rental price. For rental pricing other than a daily rate, the calculated accrual and deferral amounts are a prorated amount.

The calculation of accrued rental revenue for periodic usage and standby charges is optional, and requires additional setup on Rental Management Setup. The accrual amount calculation for periodic usage and standby charges are based on user specified percentages on Rental Management Setup.

NOTE

Accrual and deferral amounts are not calculated for Damage Waivers or Metered Usage.

To learn about the setups required for the Rental Accrual Journal, see ODT Rental Online Help, Processing Rentals, Additional Rental Processes, Rental Accruals and Deferrals, then Set Ups for Accruals and Deferrals.

To learn about the Rental Accrual Journal, see ODT Rental Online Help, Processing Rentals, Additional Rental Processes, Rental Accruals and Deferrals, then Rental Accrual Journal Overview.

To learn about processing rental accruals and deferrals, see ODT Rental Online Help, Processing Rentals, Additional Rental Processes, Rental Accruals and Deferrals, then How to Process a Rental Accrual Journal.

4.13.2. Setups for Accruals and Deferrals

4.13.2.1. Overview of Setups for Accruals and Deferrals

The setups for the Rental Revenue Accrual and Deferral feature is dependent upon the pricing schemas used for invoicing. In addition, whether the organization wants to record only accrued rental revenue or record deferred rental revenue as well.

Rentals requires the setup of the following:

- A No Series for the Document No. on Rental Accrual Journals
- A Rental Accrual batch or batches
- Configuration of Rental Management Setup

Customer Posting Group:

- The Rental Accrual Receivable Acc. No. field must be populated with the Balance sheet receivables G/L Account. This field is mandatory, in order to post the Rental Accrual Journal.

General Posting Setup:

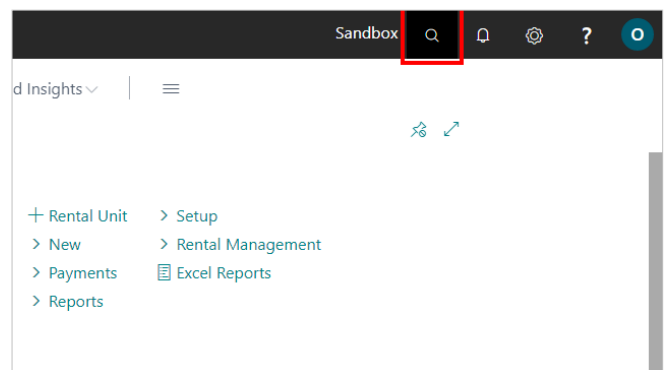
- An Income Statement, Revenue account, must be specified in the Accrue Rental Account field, where the accrued rental revenue will be credited to.
- An Income Statement, Revenue account, must be specified in the Accrue Periodic Usage Account field if the organization is using the Periodic Usage pricing.

4.13.2.2. Setting up the No. Series for the Accrual Journal Batches

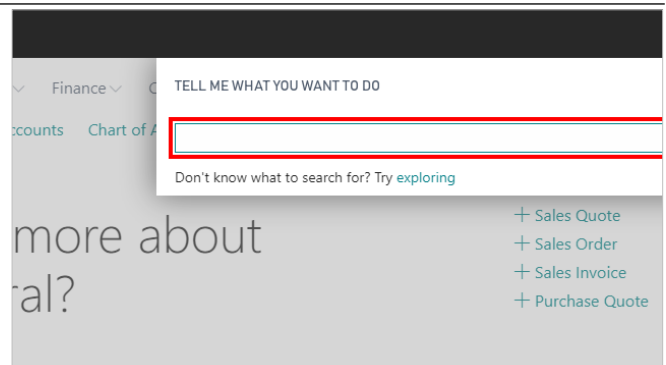
A No. Series is required for setup on Rental Management Setup for the Rental Accrual Journal posting and the journal batch setup.

The following demonstrates the setup of the Rental Accrual Journal No. Series.

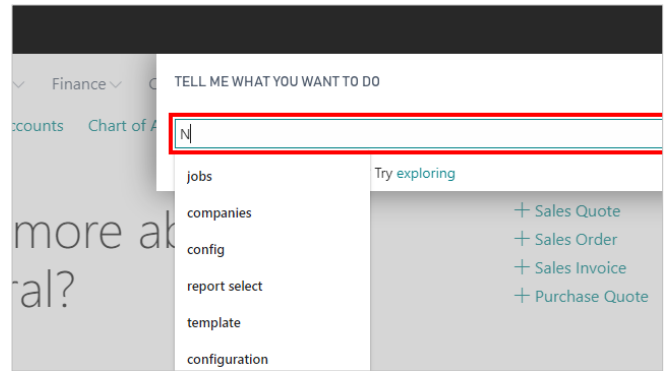
Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports, documentation, and apps and consulting services.



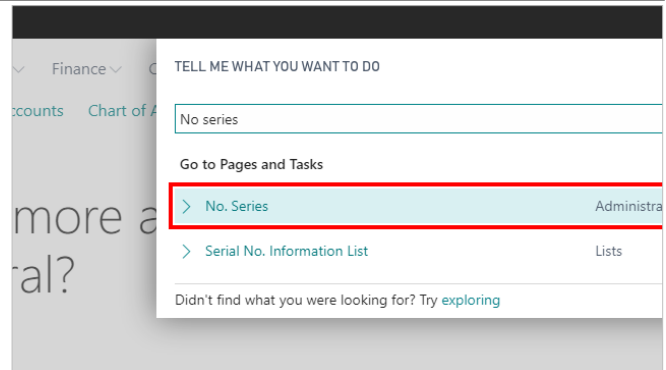
Click on the field **Type to start search:**



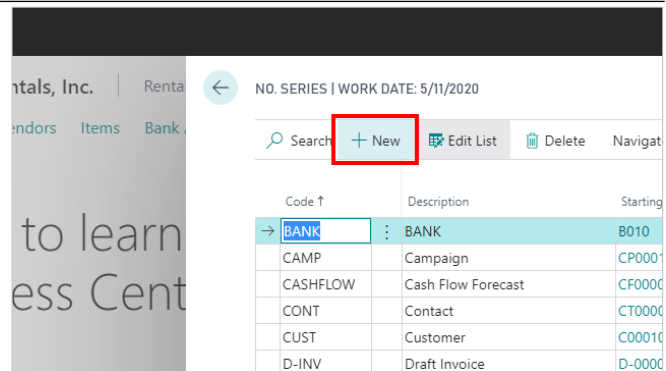
Enter the text **No series**.



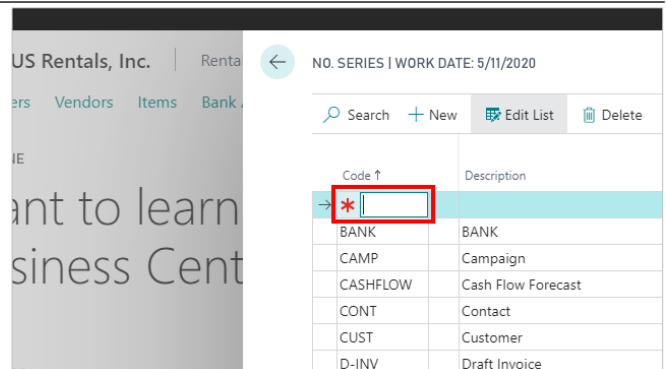
Click on **No. Series Administration** ☐



Click on the navigation menu item **New**



Click on the cell **Code**





Enter the text **Rent-Acc.**

Enter a unique code for the No. Series.

Code ↑	Description
* R	
BANK	BANK
CAMP	Campaign
CASHFLOW	Cash Flow Forecast
CONT	Contact
CUST	Customer
D-INV	Draft Invoice

Click on the cell **Description**

Code ↑	Description	Starting No.
* Rent-Acc		
BANK	BANK	B010
CAMP	Campaign	CP0001
CASHFLOW	Cash Flow Forecast	CF000001
CONT	Contact	CT000001
CUST	Customer	C00010
D-INV	Draft Invoice	D-00001

Enter the text **Rental Accrual Journal.**

Code ↑	Description	Starting No.
→ RENT-ACC		
BANK	BANK	B010
CAMP	Campaign	CP0001
CASHFLOW	Cash Flow Forecast	CF000001
CONT	Contact	CT000001
CUST	Customer	C00010
D-INV	Draft Invoice	D-00001

Click on **Default Nos.**

Ending No.	Last Date Used	Last No. Used	Def... Nos.	M N
B990			<input type="checkbox"/>	
CP9999			<input checked="" type="checkbox"/>	
CT100000	4/6/2020	CT000023	<input checked="" type="checkbox"/>	
C99990	4/6/2020	C00010	<input checked="" type="checkbox"/>	
D-99999			<input checked="" type="checkbox"/>	

Click on the navigation menu item popup **Navigate**

. SERIES | WORK DATE: 5/11/2020				
Search	+ New	Edit List	Delete	Navigate
Open in Excel	More options			
Code ↑	Description	Starting No.	Ending No.	Last Date Used
RENT-ACC	Rental Accrual Journal	—	—	—
BANK	BANK	B010	B990	—
CAMP	Campaign	CP0001	CP9999	—
CASHFLOW	Cash Flow Forecast	CF000001	—	—
CONT	Contact	CT000001	CT100000	4/6/2020
CUST	Customer	C00010	C99990	4/6/2020

Click on the navigation menu item **Lines**

. NO. SERIES | WORK DATE: 5/11/2020				
Search	+ New	Edit List	Delete	Lines
Relationships				
→ RENT-ACC	Rental Accrual Journal			
BANK	BANK			
CAMP	Campaign			
CASHFLOW	Cash Flow Forecast			
CONT	Contact			
CUST	Customer			

Click on the cell **Starting No.**

RENT-ACC · RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020				
No. Series Lines	Search	+ New	Edit List	Delete
Starting Date ↑	Starting No. ↑	Ending No.	Last Date Used	Last No. Used
→				

Enter the text **RAC00001**.

Enter a unique starting number.

RENT-ACC · RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020				
No. Series Lines	Search	+ New	Edit List	Delete
Starting Date ↑	Starting No. ↑	Ending No.	Last Date Used	Last No. Used
→	RAC00001			
	1			
	7/31/2020			
	100.00			
	PE-MONTH			



Click on the cell **Ending No.**

RENT-ACC · RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020

No. Series Lines | Search | + New | Edit List | Delete | Open in E

Starting Date ↑	Starting No. ↑	Ending No.	Last Date Used	Last No. Used	Warni
→	RAC00001				

Enter the text **RAC99999**.

RENT-ACC · RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020

No. Series Lines | Search | + New | Edit List | Delete | Open in E

Starting Date ↑	Starting No. ↑	Ending No.	Last Date Used	Last No. Used	Warni
→	RAC00001	R			

1

Click on the back button

Central

RENT-ACC · RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020

Back

No. Series Lines | Search | + New

Starting Date ↑	Starting No. ↑	En
→	RAC00001	RA

Click on the back button

Central

CRONUS Rentals, Inc. | Rentals

Customers | Vendors | Items | Bank

HEADLINE

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NO. SERIES | WORK DATE: 5/11/2020

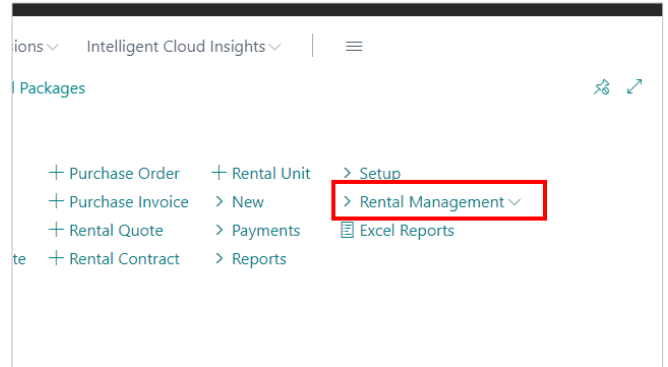
Back

Search | + New | Edit List

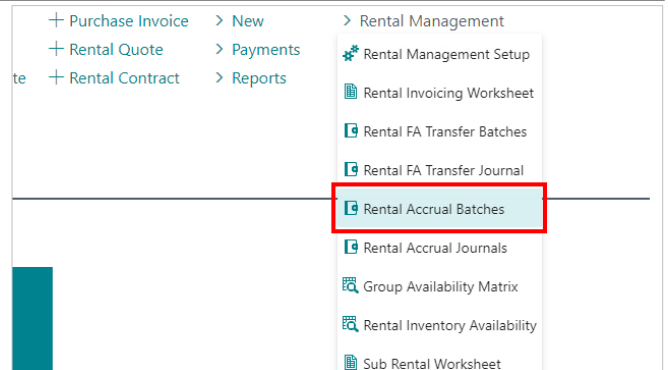
Code ↑	Description
PHYS-INV+	Posted Phys. Invent.
P-INV	Purchase Invoice
P-INV+	Posted Purchase Inv
P-ORD	Purchase Order
P-QUO	Purchase Quote
P-RCPT	Purchase Receipt

The following provides a review of the Rental Accrual Journal Batch.

Click on the navigation menu item popup **Rental Management**

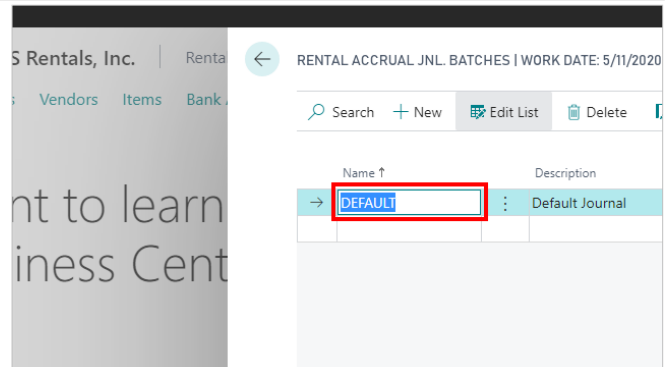


Click on the navigation menu item **Rental Accrual Batches**



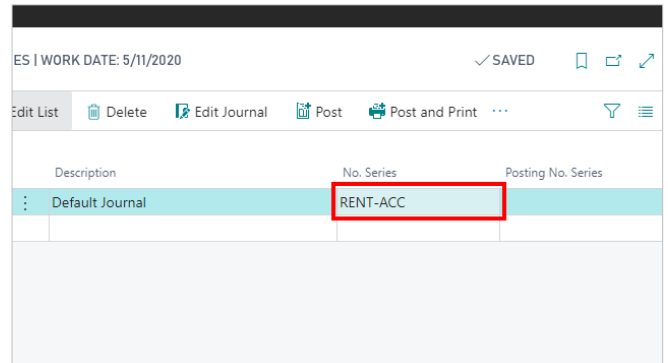
Click on the cell **Name** with the value **DEFAULT**

A Default batch is automatically created when the batch list is opened. Additional batches can be created.

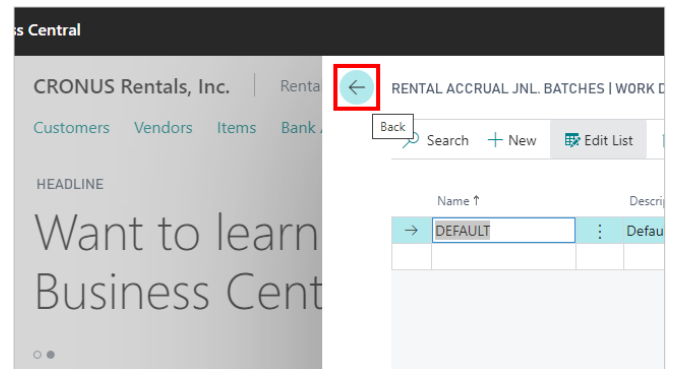


Click on the cell **No. Series** with the value **RENT-ACC**

The No. Series field is automatically populated with the No. Series specified in the Rental Accrual Journal Nos. field, on Rental Management Setup.



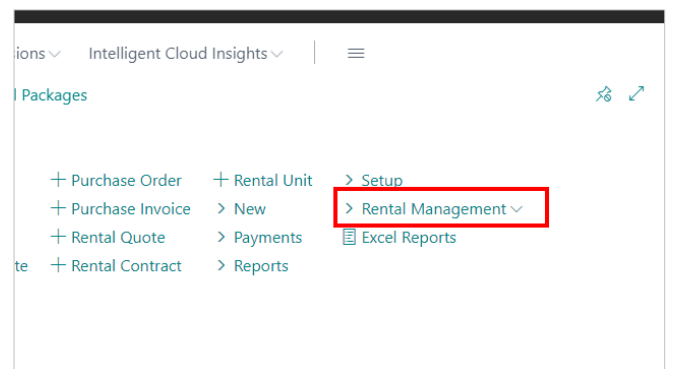
Click on the back button



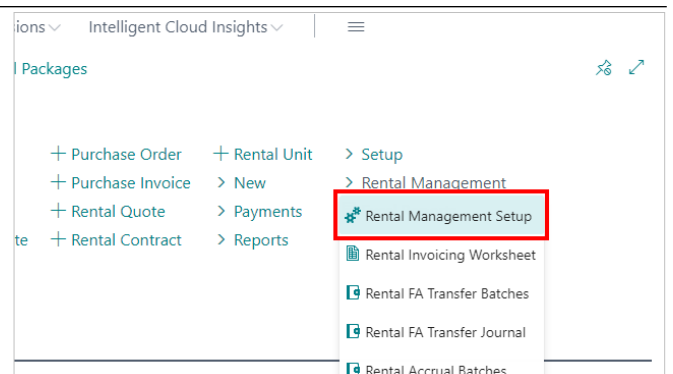
4.13.2.3. Setting up Rental Management Setup for Accruals and Deferrals

The following demonstrates the setting on the Rental Management Setup that are related to the Rental Accrual feature.

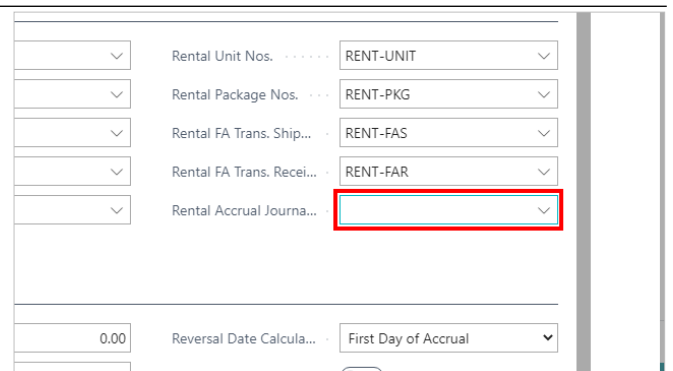
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**



Click on the field **Rental Accrual Journal Nos.**





Click on the link in cell **Code** with the value **RENT-ACC**

Select the No. Series that has been setup for the Rental Accrual Journal.

NOTE:

The total of the Accrue Periodic % and Accrue Standby % are to equal 100. Thus if your organization does not use Standby Charges and wish to accrue Periodic Usage, then the value in the Accrue Periodic % field should be 100.

Click on the field **Accrue Periodic %**

Specifies the percentage of estimated Periodic Usage to be accrued. The calculation of the usage to be accrued is based on the Periodic Usage Price times the number of days times the percentage entered in this field.

Enter the text **80.00**.

Enter the percentage of the estimated Periodic Usage to be accrued.

Click on the field **Accrue Standby %**

Specifies the percentage of estimated Standby Charges to be accrued. The calculation of the charge to be accrued is based on the Standby Charge Price times the number of days times the percentage entered in this field.



ODT Rentals Online Help

Enter the text **20.00**.

Enter the percentage of the estimated Standby Charges to be accrued.

NOTE:

Should your organization not utilize the Standby Charges functionality or not wish to accrue an estimated % of charges, then leave this field blank

Click on the field **Reversal Date Calculation**

Specifies when the reversal of the accrued revenue is to occur. The two options available include, First Day of Accrual and Last Day of Accrual.

The option, First Day of Accrual, means that the reversing entries will have a posting date of the first day in the following accounting period accrual journal.

The option, Last Day of Accrual, means that the reversing entries will have a posting date of the last day in the following accounting period accrual journal.

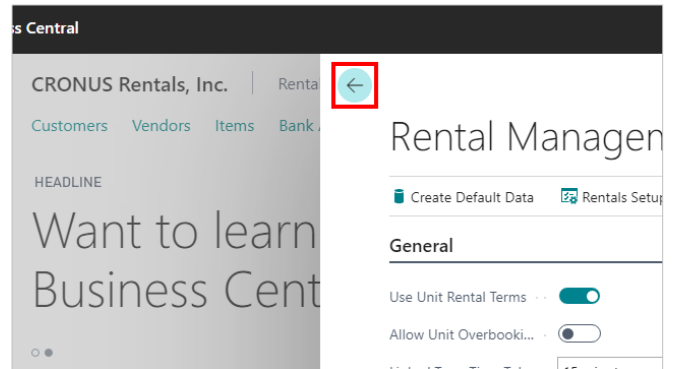
Click on the item **First Day of Accrual** in the list

Select the preferred option.

Click on the toggle field Calculate Deferred Revenue

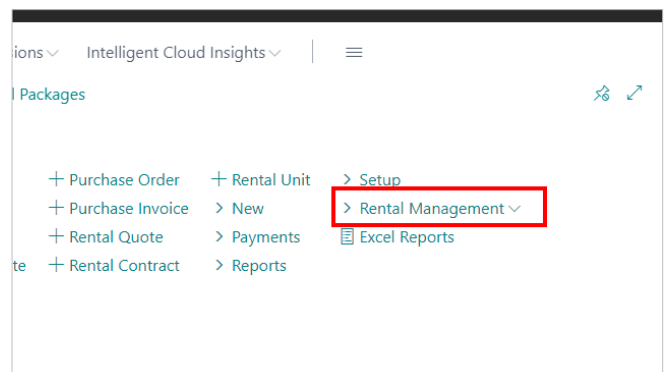
Should the organization want to calculate Deferred Rental Revenue and include the records on the Rental Accrual Journal, then enable the option.

Click on the back button

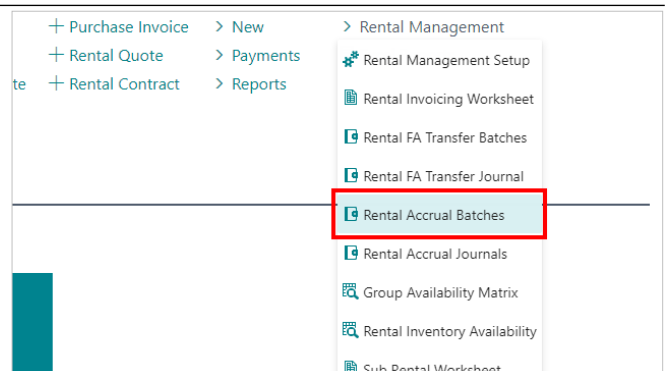


The following provides a review of the Rental Accrual Journal Batch.

Click on the navigation menu item popup **Rental Management**

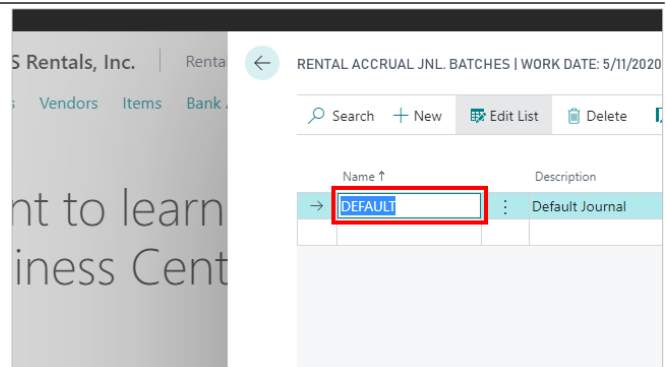


Click on the navigation menu item **Rental Accrual Batches**



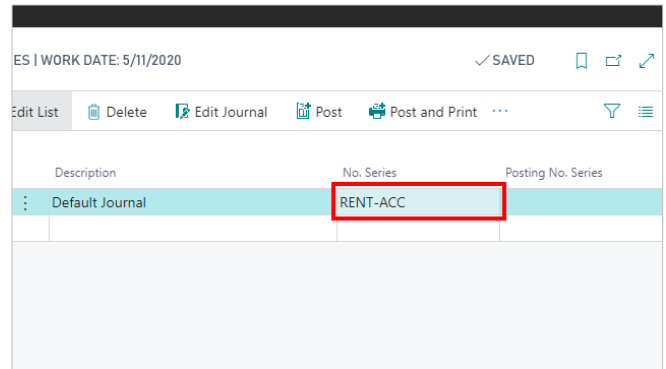
Click on the cell **Name** with the value **DEFAULT**

A Default batch is automatically created when the batch list is opened. Additional batches can be created.



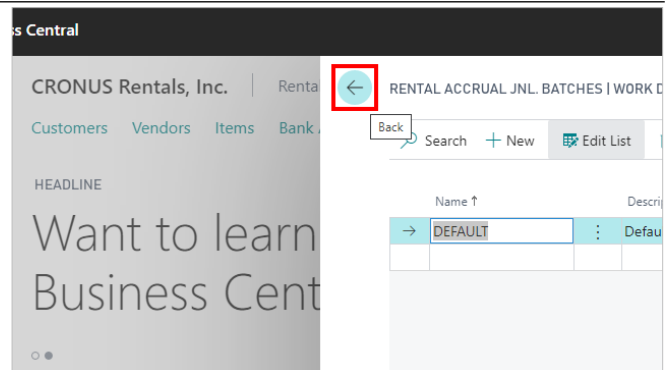
Click on the cell **No. Series** with the value **RENT-ACC**

The No. Series field is automatically populated with the No. Series specified in the Rental Accrual Journal Nos. field, on Rental Management Setup.



Description	No. Series	Posting No. Series
Default Journal	RENT-ACC	

Click on the back button



CRONUS Rentals, Inc. | Rental

Customers Vendors Items Bank

HEADLINE

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RENTAL ACCRUAL JNL. BATCHES | WORK D

Back Search + New Edit List

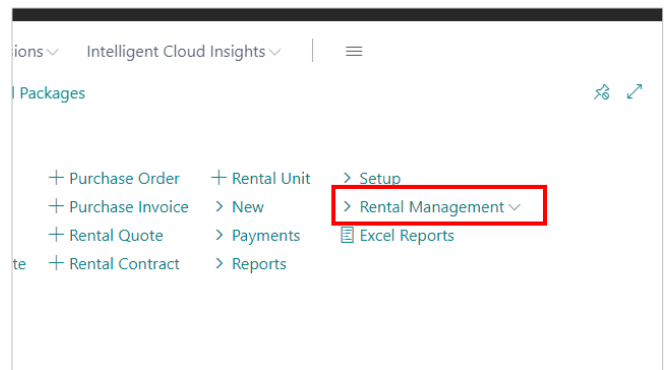
Name ↑ Description

→ DEFAULT : Defau

4.13.2.4. Reviewing the Rental Accrual Journal Batch

The following provides a review of the Rental Accrual Journal Batch.

Click on the navigation menu item popup **Rental Management**



Intelligent Cloud Insights

Packages

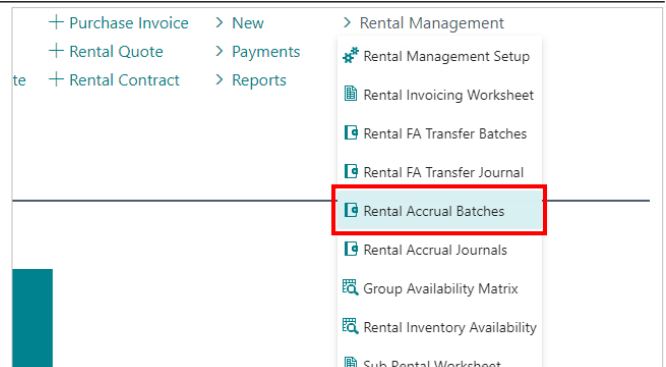
+ Purchase Order + Rental Unit > Setup

+ Purchase Invoice > New > Rental Management

+ Rental Quote > Payments Excel Reports

+ Rental Contract > Reports

Click on the navigation menu item **Rental Accrual Batches**



+ Purchase Invoice > New > Rental Management

+ Rental Quote > Payments Rental Management Setup

+ Rental Contract > Reports Rental Invoicing Worksheet

Rental FA Transfer Batches

Rental FA Transfer Journal

Rental Accrual Batches

Rental Accrual Journals

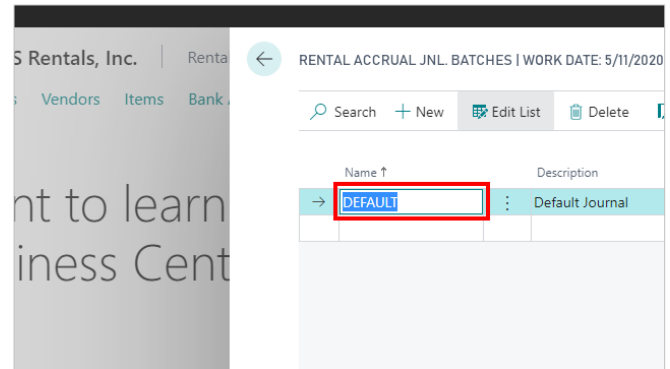
Group Availability Matrix

Rental Inventory Availability

Sub Rental Worksheet

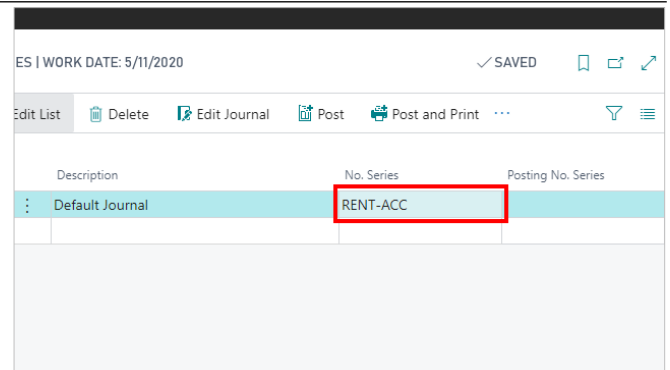
Click on the cell **Name** with the value **DEFAULT**

A Default batch is automatically created when the batch list is opened. Additional batches can be created.

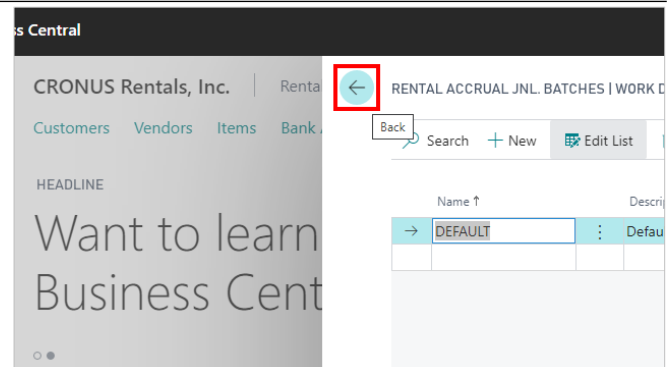


Click on the cell **No. Series** with the value **RENT-ACC**

The No. Series field is automatically populated with the No. Series specified in the Rental Accrual Journal Nos. field, on Rental Management Setup.



Click on the back button

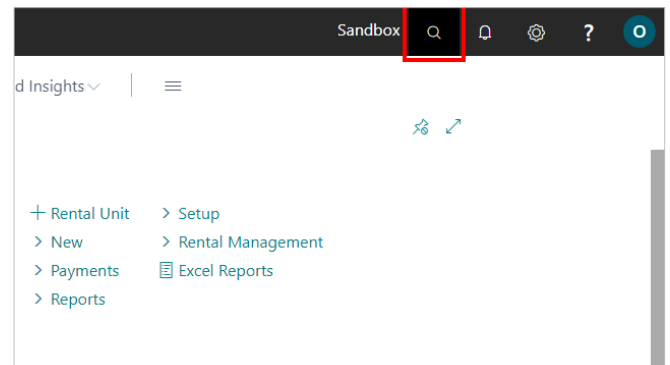


4.13.2.5. Setting up the Customer Posting Group for Accruals

The following demonstrates the setting up of the G/L account for accrued rental revenue receivables on the Customer Posting Groups.

For this example, a new G/L Account was setup.

Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**





ODT Rentals Online Help

Click on the field **Type to start search:**

Enter the text **Customer Posting** .

Click on **Customer Posting Groups Administration**



Click on the cell **Rental Accrual Receivable Acc. No.**

Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Rental Package Rounding Acc. No.	Rental Accrual Receivable Acc. No.
61900	40500	40500	61950	
61900	40500	40500	61950	



ODT Rentals Online Help

Click on the link in cell **No.** with the value **10450**

Select the G/L Account to which the accrued receivables for the accrued rental revenue is to be posted to.

Account	Account	Account	Account	Debit Acc.	Credit Acc.	No.
61900	61900	61900	61900	40500	40500	61
61900	61900	61900				
			No.	Name		Incl
			10300	Petty Cash		Be
			10400	Accounts Receivable		Be
			10450	Accrued Rental Revenue		Be
			10500	Prepaid Rent		Be
			10600			Be
			+ New			

Click on the cell **Rental Accrual Receivable Acc. No.**

Credit Rounding Account	Payment Tolerance Debit Acc.	Payment Tolerance Credit Acc.	Rental Package Rounding Acc. No.	Rental Accrual Receivable Acc. No.
61900	40500	40500	61950	10450
61900	40500	40500	61950	

Click on the link in cell **No.** with the value **10450**

61900	61900	61900	61900	40500	40500	61
61900	61900	61900	61900	40500	40500	61
			No.	Name		Incl
			10300	Petty Cash		Be
			10400	Accounts Receivable		Be
			10450	Accrued Rental Revenue		Be
			10500	Prepaid Rent		Be
			10600			Be
			+ New			

Click on the back button

Dynamics 365 Business Central					
CUSTOMER POSTING GROUPS | WORK DATE: 5/11/2020					
← Search + New Edit List Delete Edit View					
Show All Accounts					
Code ↑	Receivables Account	Service Charge Acc.	Payment Disc. Debit Acc.	Payment Disc. Credit Acc.	
DOMESTIC	10400		40300	40300	

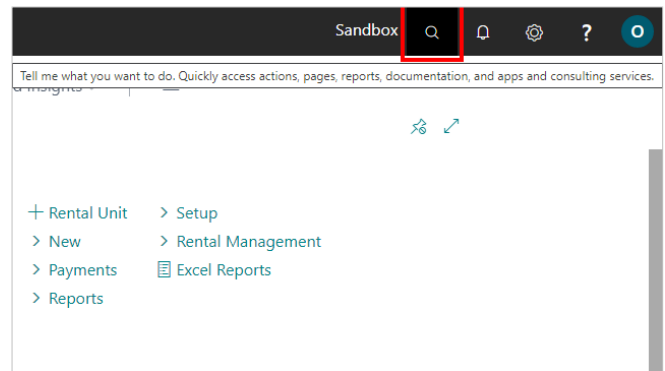
4.13.2.6. Setting up the General Posting Setup for Accruals and Deferrals

The following demonstrates the setting up of the G/L accounts for accrued rental revenue and the deferred rental revenue liability on the General Posting Setup.

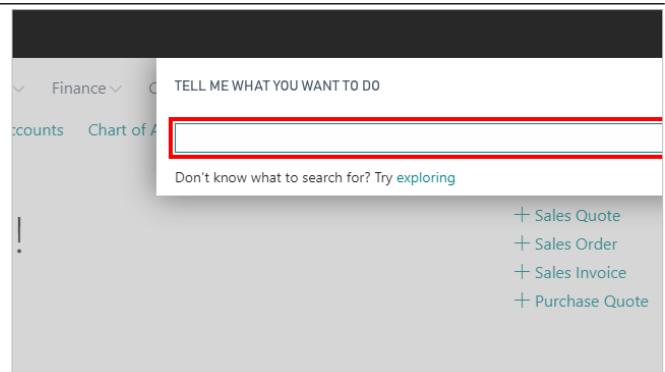
For this example, new G/L Accounts were setup.

ODT Rentals Online Help

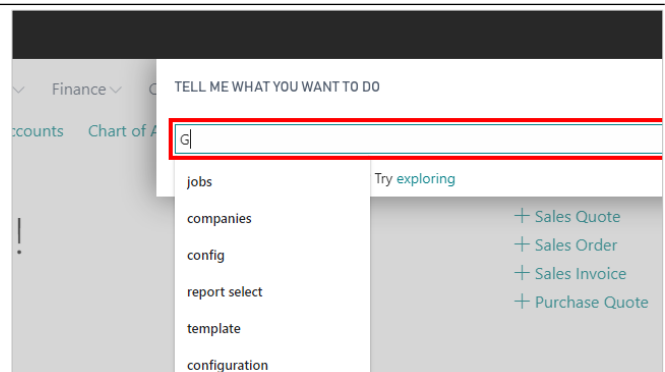
Click on the link **Tell me what you want to do**.
Quickly access actions, pages, reports, documentation, and apps and consulting services.



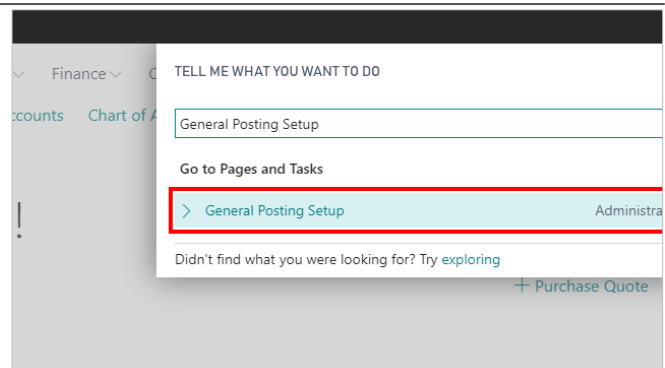
Click on the field **Type to start search:**



Enter the text **General Posting Setup**.



Click on **General Posting Setup Administration** ☐





Click on the cell **Accrue Rental Account**

Metered Usage Account	Periodic Usage Account	Standby Charge Account	Accrue Rental Account	Deferred Liability Account	Accrue Periodic Usage Account	Accrue Standby Charge Account
40100	40100	40100				
40100	40100	40100				
40100	40100	40100				
40100	40100	40100				
40100	40100	40100				
40100	40100	40100				
40100	40100	40100				

Click on the link in cell **No.** with the value **40690**

Select the revenue G/L Account that the accrued rental revenue is to be posted to.

No.	Name	Inc
40450	Job Sales Applied	In
40500	Interest Income	In
40690	Accrued Rental Revenue	In
40990	Select record "40690" IME	In
50001	COST OF GOODS SOLD	In
+ New		

Click on the cell **Deferred Liability Account**

Periodic Usage Account	Standby Charge Account	Accrue Rental Account	Deferred Liability Account	Accrue Periodic Usage Account	Accrue Standby Charge Account
40100	40100				
40100	40100	40690			
40100	40100				
40100	40100				
40100	40100				
40100	40100				

When an organization has enabled the Calculate Deferred Rental Revenue on Rental Management Setup, then the selection of a liability G/L Account that the deferred revenue is to be posted to is mandatory.

Click on the link in cell **No.** with the value **20450**

Select the liability G/L Account that the deferred revenue is to be posted to.

No.	Name	Inc
20100	Accounts Payable	Ba
20200	Purchase Discounts	Ba
20300	Purchase Returns & Allowances	Ba
20400	Deferred Revenue	Ba
20450	Deferred Rental Revenue	Ba
+ New		

When an organization has specified the Accrue Periodic %, and if applicable, the Accrue Standby % on Rental Management Setup, then the G/L Accounts that the accrued periodic usage and standby charge revenue is to be posted to must be specified.

Should an organization be using the Rental Calendar for day rental terms, and will be specifying some days as Use Standby Price, then a G/L Account must be specified in the Accrued Standby Charge Account field.

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Click on the cell **Accrue Periodic Usage Account**

[illegible]

Click on the link in cell **No.** with the value **40690**

Select the G/L Account that the accrued Periodic Usage revenue is to be posted to.

40100	50100	40100	40100	40100		
40100	50100	40100	40100	40100	40690	20
40100	50100	40100				
40100	50100	40100				
40100	50100	40100				
40100	50100	40100				
40100	50100	40100				

No.	Name	In
40400	Sales Returns & Allowances	In
40450	Job Sales Applied	In
40500	Interest Income	In
40690	Accrued Rental Revenue	In
40990	TOTAL INCOME	In

+ New

Click on the cell **Accrue Standby Charge Account**

Standby Charge Account	Accrue Rental Account	Deferred Liability Account	Accrue Periodic Usage Account	Accrue Standby Charge Account
40100				
40100	40690	20450	40690	
40100				
40100				
40100				
40100				
40100				

Click on the link in cell **No.** with the value **40690**

Select the G/L Account that the accrued Standby Charge usage revenue is to be posted to.

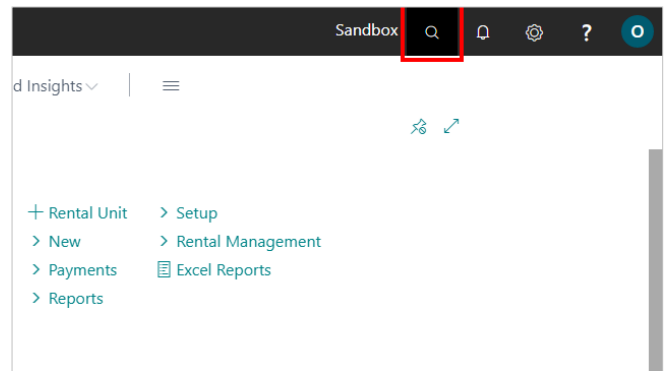
Sub Rental Purchase Acc. No.	Metered Usage Account	Periodic Usage Account	Standby Charge Account	Accrue Rental Account	Deferred Liability Account	At Pe Ac
50100	40100	40100	40100			
50100	40100	40100	40100	40690	20450	40
50100	40100	40100				
50100	40100	40100	No.	Name		Inc
50100	40100	40100	40500	Interest Income		In
50100	40100	40100	40690	Accrued Rental Revenue		In
50100	40100	40100	40990	TOTAL INCOME		In
50100	40100	40100	50001	COST OF GOODS SOLD		In
			50100	Cost of Materials		In
			<div> <div></div> <div>+ New</div> </div>			

4.13.3. Rental Accrual Journal Overview

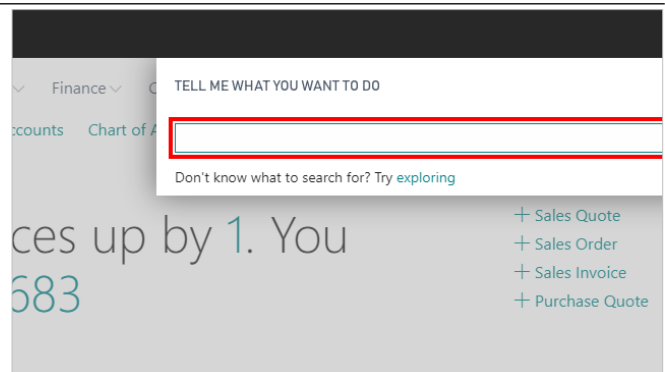
4.13.3.1. Accessing the Rental Accrual Journal

The following method of accessing the accrual journal is by using the search option.

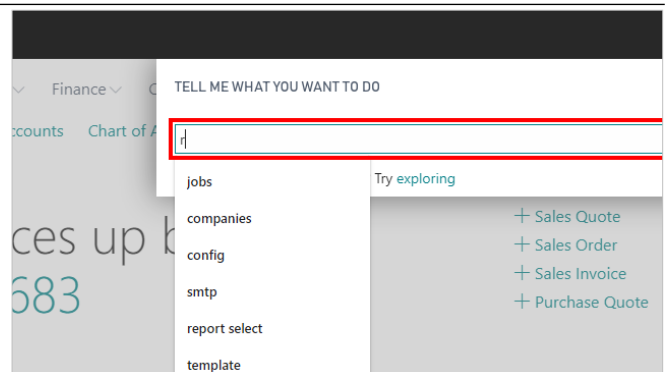
Click on the link **Tell me what you want to do.**
Quickly access actions, pages, reports,
documentation, and apps and consulting
services.



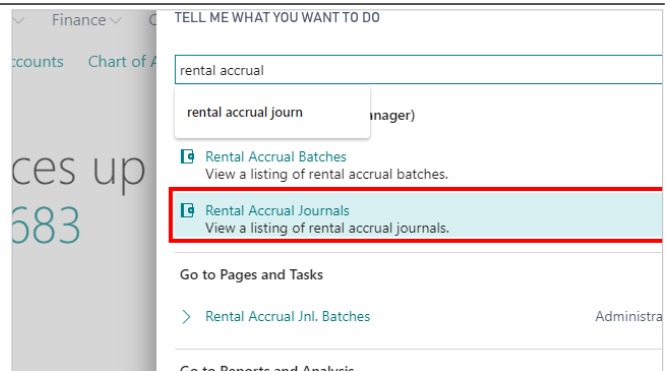
Click on the field **Type to start search:**



Enter the text **rental accrual.**

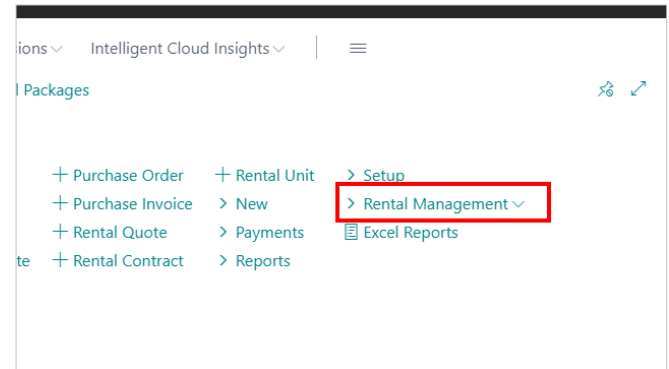


Click on **Rental Accrual Journals**

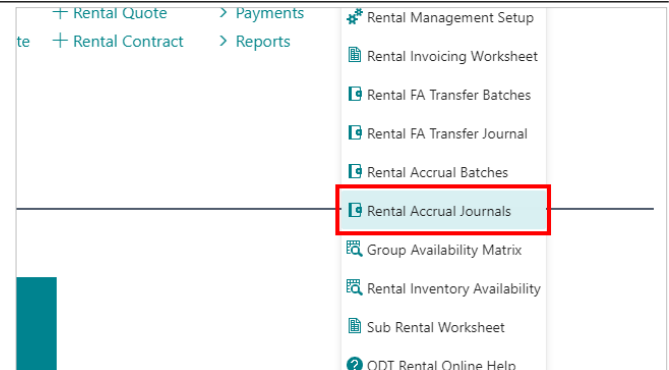


The following demonstrates the accessing of the rental accrual journal from within the Actions area on the Business Manager and Sales Order Processor role centers.

Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Accrual Journals**



4.13.3.2. Rental Accrual Journal Menu and Fields

The following picture displays the Rental Accrual Journal.

←

RENTAL ACCRUAL JOURNAL | WORK DATE: 5/11/2020

🔖

📄

🔗

Batch Name

.....

DEFAULT

...

Manage

🔧 Calculate Rental Accrual...

📄 Post

🔗 Dimensions

Actions

Navigate

Fewer options

🔗

🗑 Delete

🔗

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
→ 5/11/2020	RAC00001				Accrual	0.00	0.00	

The following provides an overview of the Rental Accrual Journal page and menu options.

Batch Name

- Specifies the name of the journal batch. As there can be multiple batches, the user can look-up and select a different batch than is displayed.

NOTE

A default batch is automatically created the first time the journal is opened.

Menu Options

Manage - Delete

- Used to delete any selected records.

Calculate Rental Accrual

- Opens the Calculate Rental Accrual request page to prepare for calculating the rental revenue accrual, and if applicable, deferral amounts.

Post

- When selected the rental accrual journal will post. The accrual, and if applicable, deferral amounts will be posted to the related accounts setup in the Customer Posting Group and General Posting Setup.

Dimensions

- Displays the Dimensions for the entry, which default from the Rental Line that the Rental Unit is on.

Actions

- The Actions menu option contains the 2 sub-menu options of Rental Accrual and Posting.

The Rental Accrual menu option contains the menu option, Calculate Rental Accrual.

The Posting menu option contains:

- **Post**

Test Report

- View a test report so you can verify the amounts before you perform the actual posting of the journal. The Navigate menu options contains the Rental Contract and Dimension menu options.

The following provides an overview of the Rental Accrual Journal fields that are displayed by default on the lines.

Posting Date

For new accrual and deferral calculations the posting date for the accrual journal records will be set to the date specified in the Accrue as Date field, when running the Calculate Rental Accrual.

The posting date for reversing records is based on the setting specified in the Reversal Date Calculation field, on Rental Management Setup.

When the setting is, First Date of Accrual, then the reversal entries in the journal will have the posting date set to the first day of the subsequent accounting period.

- When the setting is, Last Date of Accrual, then the reversal entries in the journal will have the posting date set to the last day of the subsequent accounting period.

Document No.

- The Document No. is populated using the No. Series specified on Rental Management Setup, Number tab in the Rental Accrual Journal Nos. field.

Rental Document No.

- Displays the Rental Contract No. that the Rental Unit is on.

No.

- Displays the Rental Unit No. that the record is related to.

Description

- The description specifies whether the entry is an accrual, deferral or a reversal and contains the Rental Unit No.

Calculation Type

- Displays the entry type of the record. The types include Accrual, Deferral, or Reversal. Accrual indicates that the entry is a rental revenue accrual. Deferral indicates that the entry is a rental revenue deferral. Reversal indicates that the entry is a reversal of the current accounting period accrual or deferral.

Accrual Amount

- Displays the calculated rental revenue amount that is to be accrued for the current accounting period, or the reversal amount of the current accounting period accrual. When the Calculation Type is Accrual the amount will be positive. When the Calculation Type is Reversal, then the amount will be negative for reversing the current period accrual.

Deferral Amount

- Displays the calculated rental revenue amount that is to be deferred, or the reversal amount of the current accounting period deferral amount. When the Calculation Type is Deferral, then the amount will be negative. When the Calculation Type is Reversal, then the amount will be positive for reversing the current period deferral.

Last Invoice Date

- Specifies the date of the last invoice posted for the rental unit on the rental contract document when there has been an invoice posted.



Qty. Returned

- Displays the quantity return for the rental unit on the rental contract document, if the unit has been returned.

Rental Return Date

- Displays the date the rental unit was returned, when the rental unit has been returned.

Rental Terms Code

- Displays the Rental Terms Code on the Rental Line on the contract.

Number of Days

- Specifies the number of days in the month the calculation is being ran for.

Days to Accrue

- Specifies the number of days month that are to be accrued or deferred. Days to be accrued will be positive and days to be deferred will be negative. The Days to Accrue are calculated as the difference in the number of days between the Starting Date-Time and the Ending Date-Time fields on the journal line.

Starting Date-Time

- Specifies the date-time from which the accrual or deferral calculation commences. For accruals, the date is based on the earliest date in the month the accrual is being ran for, which has not been invoiced. For deferrals, the date is based on the last date of the last invoice posted in the current month, which invoiced days in the subsequent month.

Ending Date-Time

- Specifies the date and time at which the accrual or deferral ends as specified in the Accrue as Date.

Billing Unit Quantity

- Specifies the quantity used in the calculation of the accrual and deferral amounts. When the rental term is a prorated rental term, then the Billing Unit Quantity is calculated as the Days to Accrue divided by the Number of Days times the rental quantity. When the rental term is not prorated, then the Billing Unit Quantity displays the quantity from the rental lines.

Line Discount %

- The line discount percentage defaults from the Rental Line that the Rental Unit is on.

Line Discount Amount

- The line discount amount defaults from the Rental Line that the Rental Unit is on.

Unit Price

- The Unit Price defaults from the Rental Line that the Rental Unit is on.

The following provides an overview of the Rental Accrual Journal fields that are available to add to the accrual journal lines using Personalize.

Rental Document Line No.

- Displays the Rental Line, line no. that the rental unit in on.

Global Dimension 1 Code

- The Global Dimension Code Value defaults from the Rental Line that the unit in on.

Global Dimension 2 Code

- The Global Dimension Code Value defaults from the Rental Line that the unit in on.

Billing Unit of Measure

- Displays the Periodic Usage Period UOM Code, when the accrual or deferral amounts are calculated from periodic usage and standby changes.

Currency Code

- Displays the Currency Code from the Rental Line when a foreign currency code exists on the line.

The following picture displays the Calculate Rental Accrual request page.

CALCULATE RENTAL ACCRUAL

Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from:

Last used options and filters

Options

RENTAL ACCRUALS

Accrue as Date

4/30/2020

Filter: Rental Contract Header

× No.

RC00005

+ Filter...

OK

Cancel

Accrue as Date

- The Accrue as Date is for specifying the last day of the current accounting period for which the accrued and if applicable, deferred rental revenue is to be calculated for.

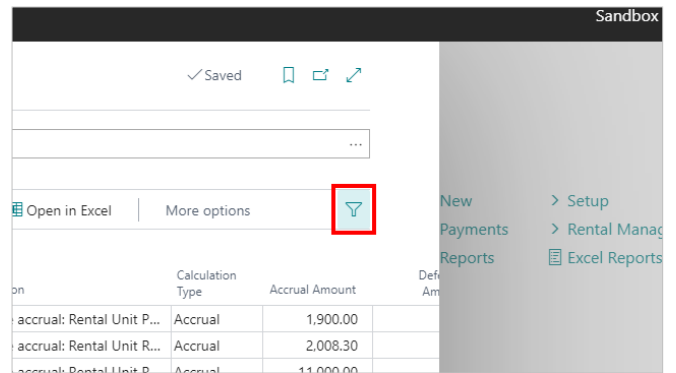
No.

- The No. field when left blank will calculate the accrual amount, and if applicable, the deferral amount for the accounting period for all rental contracts. When a rental contract number or numbers are entered in the No. field, then the calculation will be restricted to those contracts.

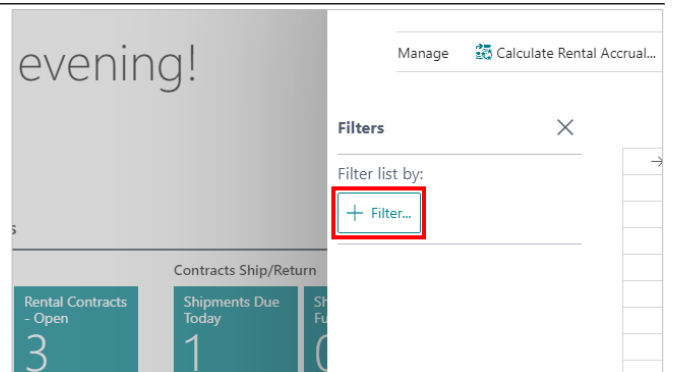
4.13.3.3. Filtering the Rental Accrual Journal Lines

The following demonstrates filtering the Accrual Journal records to show only the records for a specific Rental Contract No.

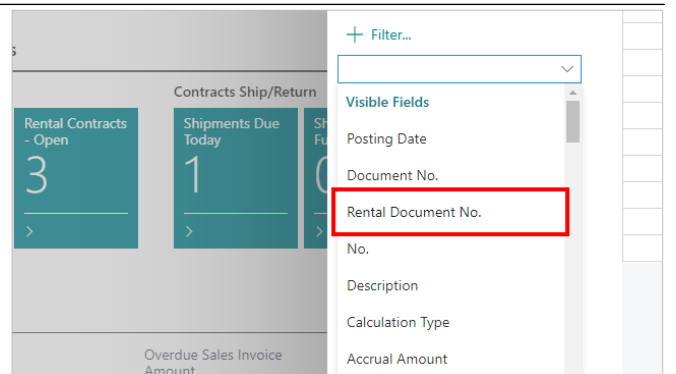
Click on the button **Show filter pane**



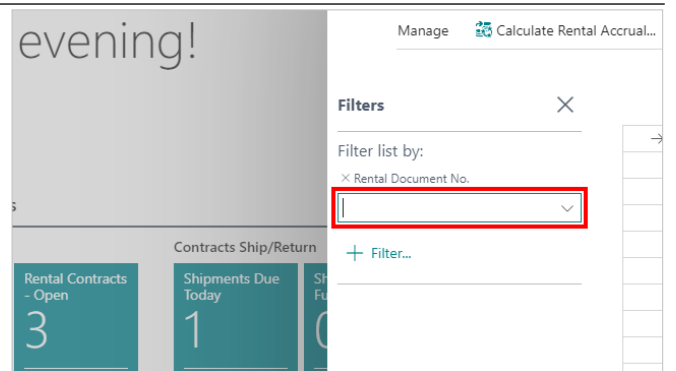
Click on the button ☐ **Filter...**



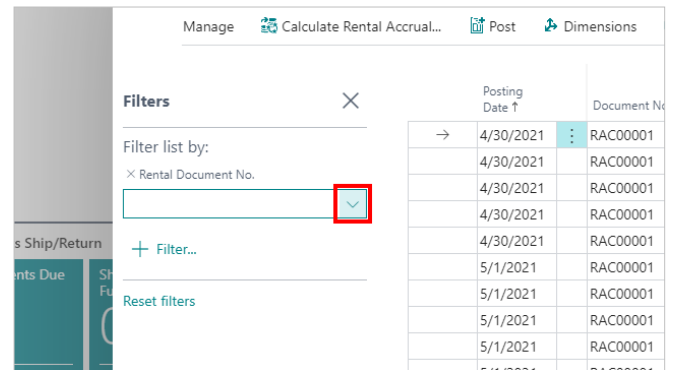
Click on the button **Rental Document No.**



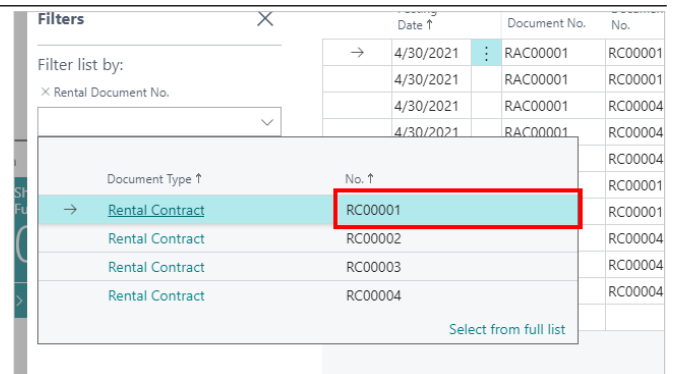
Click on the field **Rental Document No.**



Click on the lookup button **Rental Document No.**



Click on the cell **No.** with the value **RC00001**

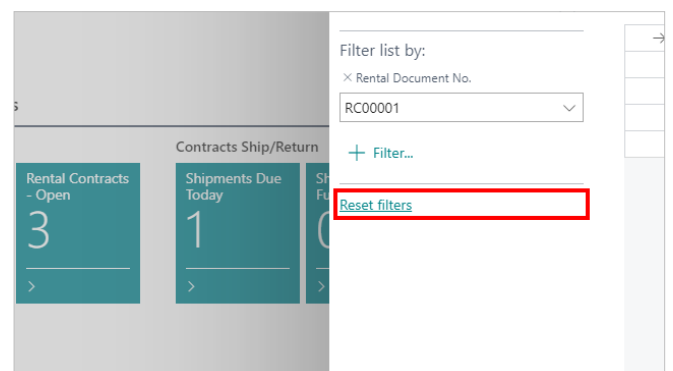


The following picture displays the filtered journal lines for the contract, showing the accrual lines with an April 30 Posting Date for the current accounting period, and the reversal lines with a May 1 Posting Date.

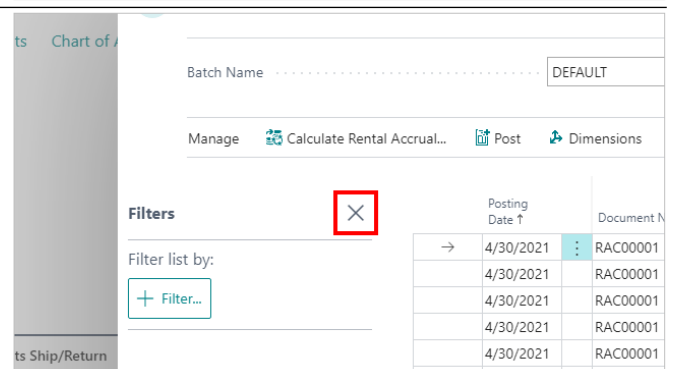
Posting Date ↑	Rental Document No. ▼	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned	Rental Return Date	Rental Terms Code	Number of Days	Days to Accrue
4/30/2021	RC00001	PG-001	Revenue accrual: Rental Unit P...	Accrual	1,900.00	0.00		0		MONTH-PEND	30	19
4/30/2021	RC00001	RU00027	Revenue accrual: Rental Unit R...	Accrual	2,008.30	0.00		0		MONTH-PEND	30	19
5/1/2021	RC00001	PG-001	Accrual reversal: Rental Unit PG...	Reversal	-1,900.00	0.00		0		MONTH-PEND	0	0
5/1/2021	RC00001	RU00027	Accrual reversal: Rental Unit RU...	Reversal	-2,008.30	0.00		0		MONTH-PEND	0	0

The following steps demonstrate how to reset the filters on the journal lines and close the filtering pane.

Click on the link **Reset filters**



Click on the button **Hide the filter pane without clearing any filters.**



4.13.4. How to Process a Rental Accrual Journal for Accruals

4.13.4.1. Overview

The following chapters will demonstrate the calculation of the accrual amounts for a variety of pricing schemas.

All the rental contracts included have the same Rental Start Date and Rental Return Date with different rental terms.

The following pricing schemas are included in this demonstration.

- Monthly rental pricing with invoicing to occur at the end of the rental contract.
- Monthly pricing with invoicing to occur at the end of each rental period.
- Daily pricing using the Rental Calendar for specifying some days as Non-billable and some days as Use Standby Price. The invoicing has been posted up to April 19. For the days from April 20 to April 30, 1 day is set as non-billable and 1 day as Use Standby Price.
- Monthly periodic usage and standby charge pricing. No invoicing for usage has been billed.

The formula for calculating the accrual amount for the Rental Price is:

Days to Accrue divided by the Number of Days times the Billing Unit Qty. times the Unit Price.

When a rental term on the rental lines is not prorated, then the Billing Unit Qty. displays the extended quantity from the Rental Amount Lines related to the unit.

When a rental term on the rental line has Prorate, All Periods, the Billing Unit Qty. displays the prorated quantity. The prorated quantity is calculated as Days to Accrue divided by Number of Days times the rental quantity from the rental lines, the same as on the Rental Amount Lines.

Periodic Usage and Standby Charge revenue accrual calculation:

When an organization is billing based on the Periodic Usage and Standby Charge pricing schema the percentages to be used in the calculation must be setup on Rental Management Setup.

The accrual amount calculation differs from the regular rental price accruals, in that the Billing Unit Qty. is calculated differently.

The Billing Unit Qty. is calculated as Days to Accrue times the percentage specified times the rental quantity.

NOTE:

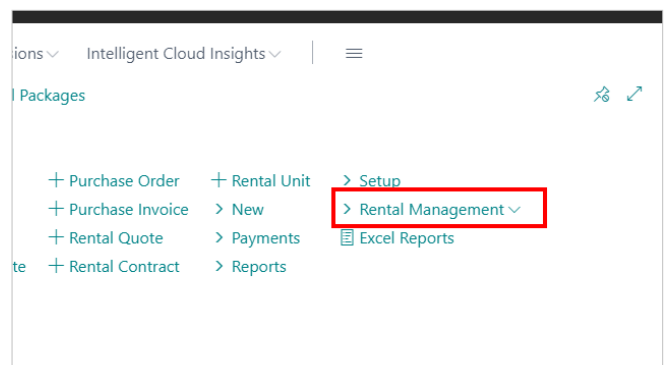
The processing of the Rental Accrual Journal does not have to be done separately for accruals and deferrals.

4.13.4.2. Processing Rental Accruals

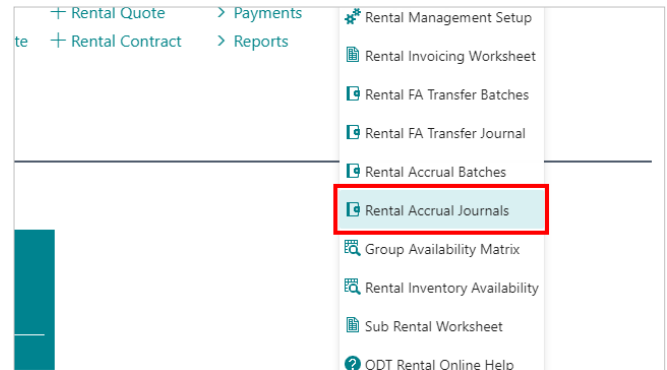
The following demonstrates the processing of accruals at the end of April.

All the rental contracts have a starting date of April 6 and an expected return date of June 5.

Click on the navigation menu item popup **Rental Management**

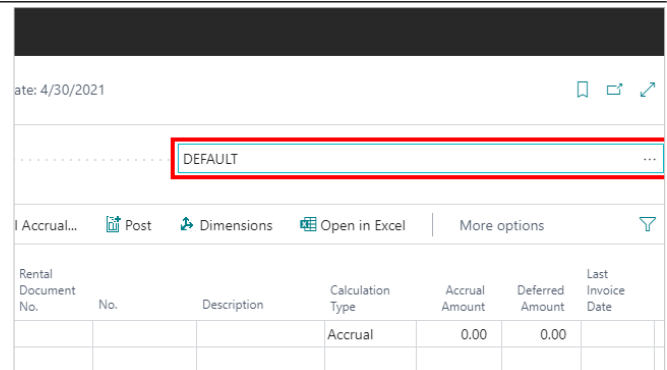


Click on the navigation menu item **Rental Accrual Journals**

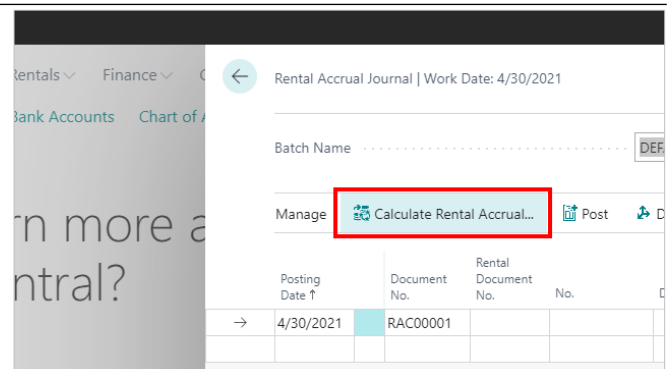


Click on the field **Batch Name**

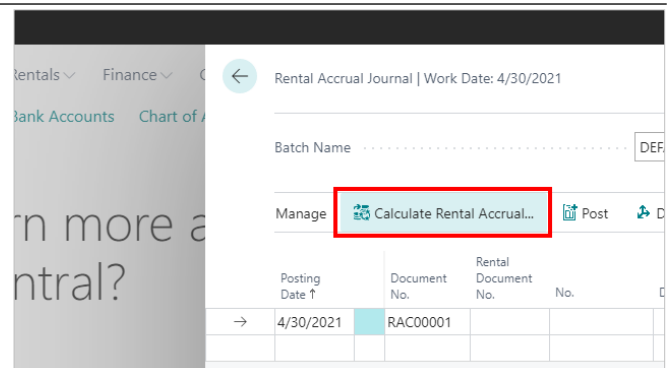
If the organization has created a different or multiple batches for the accrual journal, then the look-up can be used to select a different batch or create a batch for the accounting period the journal is to be ran for.



Click on the navigation menu item **Calculate Rental Accrual...**



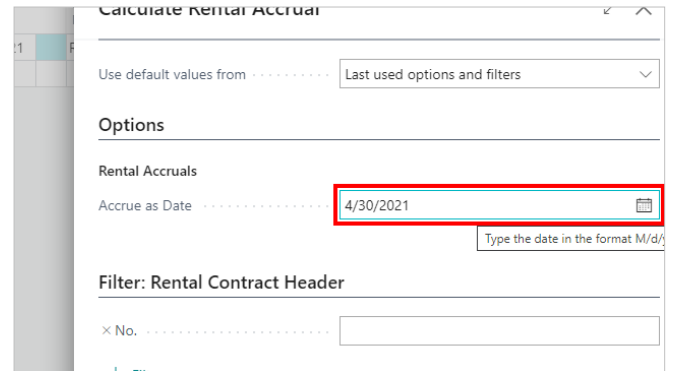
Click on the navigation menu item **Calculate Rental Accrual...**



ODT Rentals Online Help

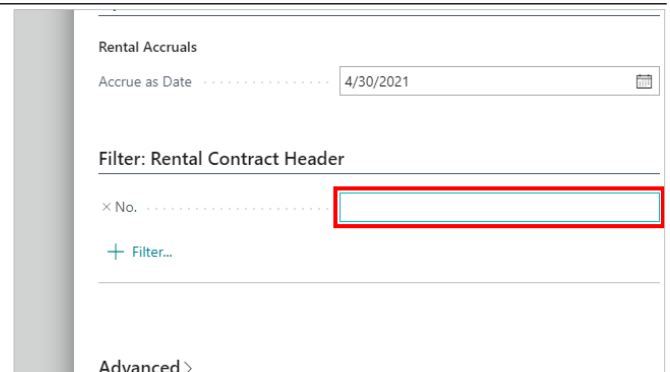
Click on the field **Accrue as Date**

Select or enter the last day of the accounting period for which the rental accrual is being ran for.

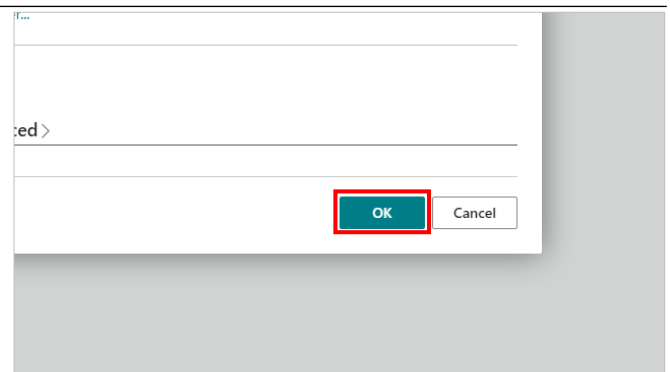


Click on the field **No.**

To include all possible accrual calculations, then leave this field blank. Should an organization only wish to include specific rental contracts to calculate the accruals for, then enter the rental contract nos. or ranges.



Click on the button **OK**



The following picture displays the journal lines created for all the rental contracts that have rental revenue to be accrued. The lines also include the reversing lines for the accrual lines.

The Posting Date is automatically populated on the journal lines with the date entered or selected in the Accrue as Date.

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned
4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.00	0.00		0
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00		0
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00		0
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00		0
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021	0
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021	0
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00		0
4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00		0
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00		0
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00		0
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00		0
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00		0
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021	0
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021	0
5/1/2021	RAC00001	RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00		0
5/1/2021	RAC00001	RC00008	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00		0

4.13.4.3. Accrual Amount Calculation for the Monthly Periodic End Contract

Click on the cell **Rental Document No.** with the value **RC00005**

Batch Name						DEFAULT
Manage Calculate Rental Accrual... Post Dimensions Op						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type	Qty. Returned
→ 4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accrual	0
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Accrual	0

Click on the cell **Calculation Type** with the value **Accrual**

Batch Name						DEFAULT
Calculate Rental Accrual... Post Dimensions Open in Excel More options						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.00	0.00	
RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	

The following describes how the Accrual Amounts were calculated for the Rental Units records for Rental Contract RC00005, which have the Rental Term of MONTH-PEND.

The Accrual Amount formula is:

Days to Accrue divided by Number of Days times Billing Unit Qty. times Unit Price

- RU00008-001 Accrual Amount: $25/30 \times 1 \times 150.00 = 125.00$
- PG-001 Accrual Amount: $25/30 \times 2 \times 500.00 = 833.33$

- The Days to Accrue is 25, which is the number of days including the Starting Date-Time, April 6, through to and including the Ending Date-Time, April 30 as no invoices were posting during the month of April.
- Number of Days is 30 for the month of April.

The following shows that the reversing lines for the contract RC00005 accrual lines are created with negative amounts in the Accrual Amount column.

The Posting Date was set based on the setup option selected on Rental Management Setup.

Click on the cell **Rental Document No.** with the value **RC00005**

	4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Av
	4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av
	4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
/Return	4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
ue	4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
St	4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Av
Full	4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Av
	5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	R
	5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	R
	5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	R
	5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	R
	5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	R
	5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	R
ce	5/1/2021	RAC00001	RC00008	RU00002	Accrual reversal: ...	R

Click on the cell **Calculation Type** with the value **Reversal**

RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021
RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021
RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00	

4.13.4.4. Accrual Amount Calculation for the Periodic Usage Contract

Click on the cell **Rental Document No.** with the value **RC00006**

					Manage	Calculate Rental Accrual...	Post	Dimensions	Op
	Posting Date ↑	Document No.	Rental Document No.	No.	Description	C	T		
→	4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Av			
	4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Av			
	4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av			
	4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av			
/Return	4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av			
ue	4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av			
St	4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Av			
Full	4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Av			
	5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	R			



Click on the cell **Calculation Type** with the value **Accrual**

Total Accrual...						
Post Dimensions Open in Excel More options						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.00	0.00	
RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	

The following describes how the Accrual Amounts for Periodic Usage and Standby Charge pricing were calculated for the Rental Unit records for Rental Contract RC00006, which have the Rental Term of MONTH-PEND.

On Rental Management Setup, the Accrue Periodic % = 80 and the Accrue Standby % = 20 for a total of 100%.

The Accrual Amount formula is:

Days to Accrue times the Billing Unit Qty. times the Unit Price

- Periodic Usage Accrual Amount: $25 \times 20 \times 300.00 = 6000.00$
- Standby Charge Accrual Amount: $25 \times 5 \times 100.00 = 500.00$

The Days to Accrue is 25, which is the number of days including the Starting Date-Time, April 6, through to and including the Ending Date-Time, April 30, as no invoice for usage was posted.

The formula for the calculation of the Billing Unit Qty. for Periodic Usage and Standby Charge calculation is:

Days to Accrue times the usage % setup on Rental Management times the rental quantity

- Periodic Usage Billing Unit Qty.: $25 \times 0.8 \times 1 = 20$
- Standby Charge Billing unit Qty.: $25 \times 0.2 \times 1 = 5$

The following shows that the reversing lines for the contract RC00006 accrual lines are created with negative amounts in the Accrual Amount column.

The Posting Date was set based on the setup option selected on Rental Management Setup.

Click on the cell **Rental Document No.** with the value **RC00006**

4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...		
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...		
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...		
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...		
4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...		
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...		
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...		
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...		
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...		
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...		
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...		
5/1/2021	RAC00001	RC00008	RU00002	Accrual reversal: ...		
5/1/2021	RAC00001	RC00008	PG-001	Accrual reversal: ...		

Click on the cell **Calculation Type** with the value **Reversal**

RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021
RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021
RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00	
RC00008	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	



4.13.4.5. Accrual Amount Calculation for the Daily Contract with Rental Calendar

Click on the cell **Rental Document No.** with the value **RC00007**

Posting Date ↑	Document No.	Rental Document No.	No.	Description	C
→ 4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Av
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	Ra
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	Ra
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Ra

Click on the cell **Calculation Type** with the value **Accrual**

Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.00	0.00	
RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	

The following describes how the Accrual Amounts were calculated for the Rental Term of DAY-PEND and the Rental Calendar has been used to specify some days as Non-Billable and some days to Use Standby Price.

The Accrual Amount formula is:

Days to Accrue divided by Number of Days times Billing Unit Qty. times Unit Price

- Rental Price Accrual Amount: $9/1 \times 1 \times 25.00 = 225.00$

- Standby Price Accrual Amount: $1/1 \times 1 \times 5.00 = 5.00$

- Number of Days: For daily rental pricing the number of days is always 1.

The use of the Rental Calendar in conjunction with the daily term impacts the calculation of the Billing Unit Qty.

If days in the calendar which have not been invoiced in the accounting period have been specified as Non-Billable or Use Standby Price then these are taken into account when calculating the Billing Unit Qty.

As an invoice had been posted on April 19, then only the days April 20 - 30 are considered for the calculation of the Billing Unit Qty.

The total number of days inclusive from April 20 through to April 30 is actually 11 days.

For this example, the rental calendar has April 25 flagged as Use Standby Price and April 26 has been flagged as Non-Billable.

- The Days to Accrue for the rental price is therefore 11 days minus 2 days = 9.

- The Days to Accrue for the standby price = 1.

The following shows that the reversing lines for the contract RC00007 accrual lines are created with negative amounts in the Accrual Amount column.

The Posting Date was set based on the setup option selected on Rental Management Setup.



Click on the cell **Rental Document No.** with the value **RC00007**

4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Av
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00008	RU00002	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00008	PG-001	Accrual reversal: ...	Re

Click on the cell **Calculation Type** with the value **Reversal**

RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021
RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021
RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00	
RC00008	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	

4.13.4.6. Accrual Amount Calculation for the Monthly Contract with Billing at the End

Click on the cell **Rental Document No.** with the value **RC00008**

Date ↑	No.	No.	No.	Description	Ty
4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	RU00002	Revenue accrual: ...	Av
4/30/2021	RAC00001	RC00008	RC00008	Revenue accrual: ...	Av
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Re
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Re

Click on the cell **Calculation Type** with the value **Accrual**

No.	No.	Description	Type	Amount	Amount	Date
RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.00	0.00	
RC00005	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,000.00	0.00	
RC00006	RU00024-001	Revenue accrual: ...	Accrual	500.00	0.00	
RC00007	RU00007	Revenue accrual: ...	Accrual	225.00	0.00	4/19/2021
RC00007	RU00007	Revenue accrual: ...	Accrual	5.00	0.00	4/19/2021
RC00008	RU00002	Revenue accrual: ...	Accrual	4,166.67	0.00	
RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021

The following describes how the Accrual Amounts were calculated for the Rental Units records for Rental Contract RC00008, which have the Rental Term of MONTH-END.

The Accrual Amount formula is:

Days to Accrue divided by Number of Days times Billing Unit Qty. times Unit Price

- RU00002 Accrual Amount: $25/30 \times 1 \times 5000.00 = 4,166.67$
- PG-001 Accrual Amount: $25/30 \times 2 \times 500.00 = 833.33$

- The Days to Accrue is 25, which is the number of days including the Starting Date-Time, April 6, through to and including the Ending Date-Time, April 30 as no invoices were posting during the month of April.
- Number of Days is 30 for the month of April.

The following shows that the reversing lines for the contract RC00008 accrual lines are created with negative amounts in the Accrual Amount column.

The Posting Date was set based on the setup option selected on Rental Management Setup.

Click on the cell **Rental Document No.** with the value **RC00008**

4/30/2021	RAC00001	RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
5/1/2021	RAC00001	RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
5/1/2021	RAC00001	RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
5/1/2021	RAC00001	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
→ 5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021
5/1/2021	RAC00001	RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021
5/1/2021	RAC00001	RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00	
5/1/2021	RAC00001	RC00008	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	

Click on the cell **Calculation Type** with the value **Reversal**



RC00008	PG-001	Revenue accrual: ...	Accrual	833.33	0.00	
RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.00	0.00	
RC00005	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,000.00	0.00	
RC00006	RU00024-001	Accrual reversal: ...	Reversal	-500.00	0.00	
RC00007	RU00007	Accrual reversal: ...	Reversal	-225.00	0.00	4/19/2021
RC00007	RU00007	Accrual reversal: ...	Reversal	-5.00	0.00	4/19/2021
RC00008	RU00002	Accrual reversal: ...	Reversal	-4,166.67	0.00	
RC00008	PG-001	Accrual reversal: ...	Reversal	-833.33	0.00	

4.13.4.7. Running the Test Report

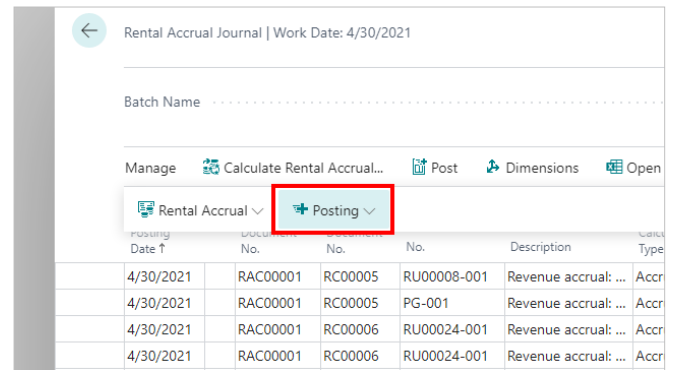
A test report can be sent to PDF, printed or previewed prior to posting the journal.

The following demonstrates the steps for running the report.

Click on the navigation menu item popup **Actions**





						DEFAULT
Post	 Dimensions	 Open in Excel	<div><u>Actions</u></div>	Related	Fewer options	
	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Rentl. Return Date
0008-001	Revenue accrual: ...	Accrual	125.00	0.00		0
001	Revenue accrual: ...	Accrual	833.33	0.00		0




Click on the navigation menu item popup **Posting**



Rental Accrual Journal | Work Date: 4/30/2021

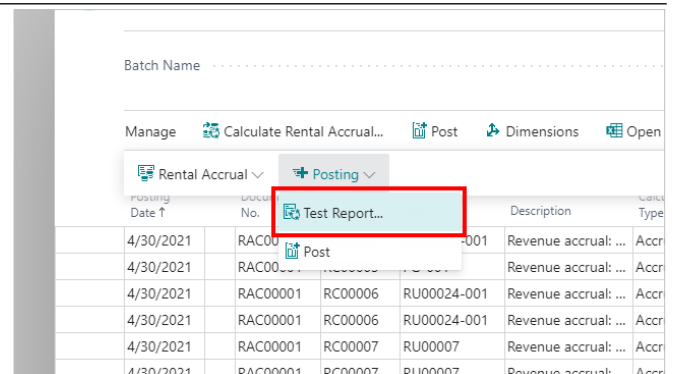
Batch Name

Manage  Calculate Rental Accrual...  Post  Dimensions  Open





 Rental Accrual  **Posting** 




Posting Date ↑	No.	No.	No.	Description	Type
4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accr

Click on the navigation menu item **Test Report...**



Batch Name

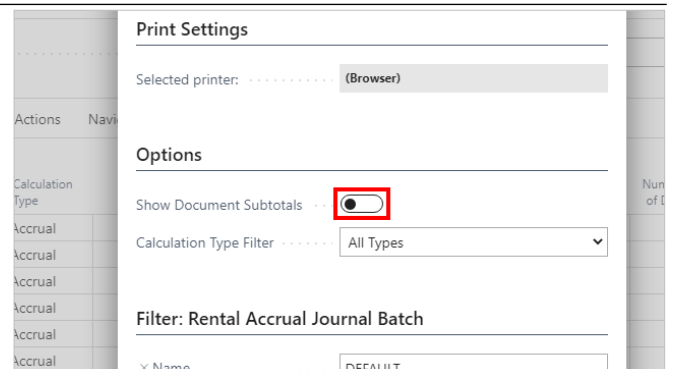
Manage  Calculate Rental Accrual...  Post  Dimensions  Open

 Rental Accrual  **Test Report...** 

Posting Date ↑	No.	No.	No.	Description	Type
4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00006	RU00024-001	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accr
4/30/2021	RAC00001	RC00007	RU00007	Revenue accrual: ...	Accr

Click on the toggle field **Show Document Subtotals**


When Show Document Subtotals is enabled, then a subtotal per rental contract will print, when the total is an amount other than 0.00.



Print Settings

Selected printer: (Browser)

Options

Show Document Subtotals 

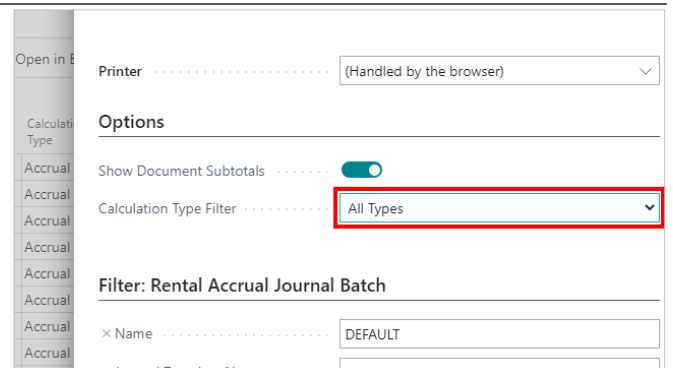
Calculation Type Filter All Types

Filter: Rental Accrual Journal Batch

× Name DEFAULT

Click on the field **Calculation Type Filter**


The Calculation Type Filter field provides the flexibility to choose whether all types or only a specific type is to be included in the report. The options include All Types, Accrual, Deferred and Reversal.



Open in ...

Printer (Handled by the browser)

Options

Show Document Subtotals 

Calculation Type Filter All Types

Filter: Rental Accrual Journal Batch

× Name DEFAULT

× Journal Template Name



Click on the item **All Types** in the list

Click on the field **Posting Date**

The Posting Date filter can be used to filter the printing to print only the current period accrual and deferral records, when the journal lines contain Reversal type entries that have the posting date of the first of the month.

Click on **Send to... Print Preview Cancel**

Select the preferred method to review the Test Report.

The following picture displays the test report with the Show Document Subtotals enabled. The date that prints at the top of the report is the system date, meaning the current date, not the user work date or the Accrue as Date.

[illegible]

4.13.4.8. Posting the April Rental Accrual Journal

The following demonstrates the posting of the April journal and the steps to review the Accrual Journal Register.

Click on the navigation menu item **Post**

← Rental Accrual Journal | Work Date: 4/30/2021

Batch Name

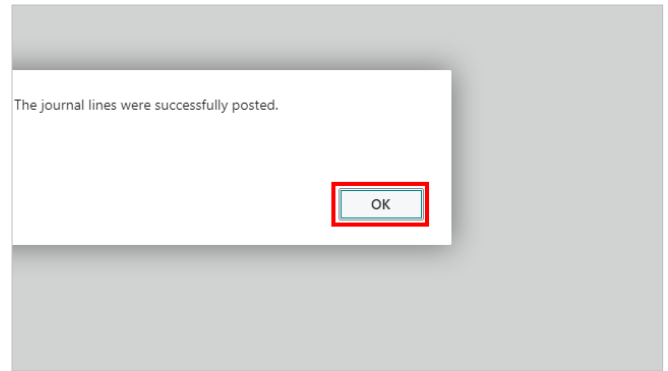
Manage Calculate Rental Accrual... Post Dimensions Open in Excel

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type
4/30/2021	RAC00001	RC00005	RU00008-001	Revenue accrual: ...	Accrual
4/30/2021	RAC00001	RC00005	PG-001	Revenue accrual: ...	Accrual
4/30/2021	RAC00001	RC00005	BU00024-001	Revenue accrual: ...	Accrual
225.00	0.00	4/19/2021	0	DAY-PEND	1 9
5.00	0.00	4/19/2021	0	DAY-PEND	1 1
-4,166.67	0.00	0	0	MONTH-END	30 25
					30 25
					0 0
					0 0
					0 0
					0 0
					0 0
-5.00	0.00	4/19/2021	0	DAY-PEND	0 0
-4,166.67	0.00	0	0	MONTH-END	0 0
-833.33	0.00	0	0	MONTH-END	0 0

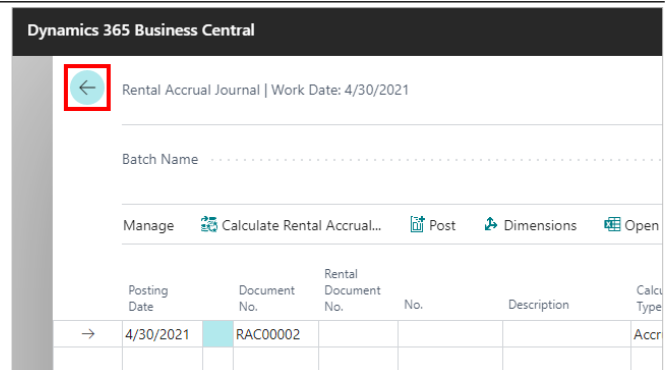
Do you want to post the journal lines?

Yes No

Click on the button **OK**

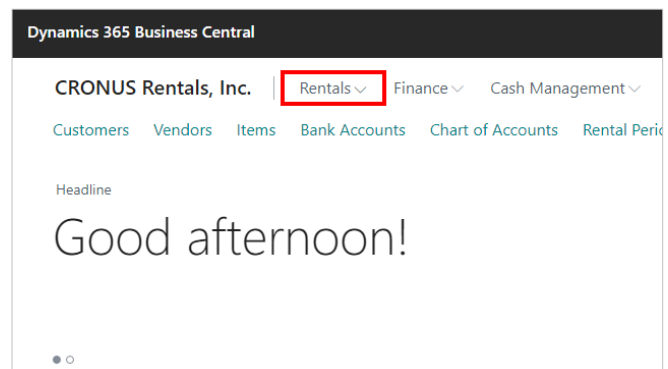


Click on the back button

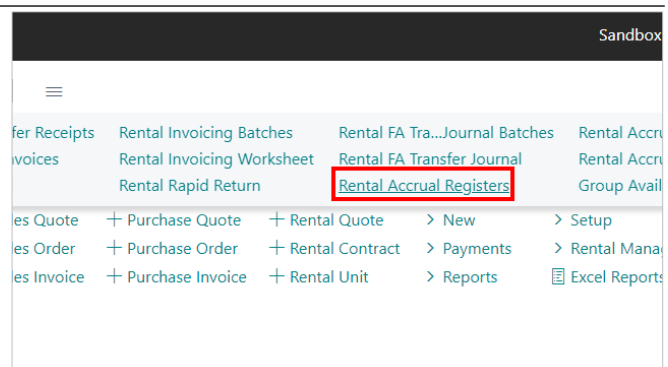


The following demonstrates the steps for accessing the Rental Accrual Registers and viewing the entries.

Click on **Rentals**



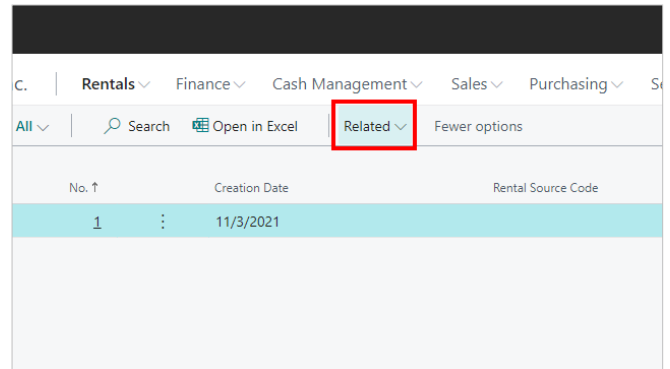
Click on the navigation menu item **Rental Accrual Registers**



The following picture displays the Rental Accrual Register list. The list displays all Rental Accrual Journals which have been posted.

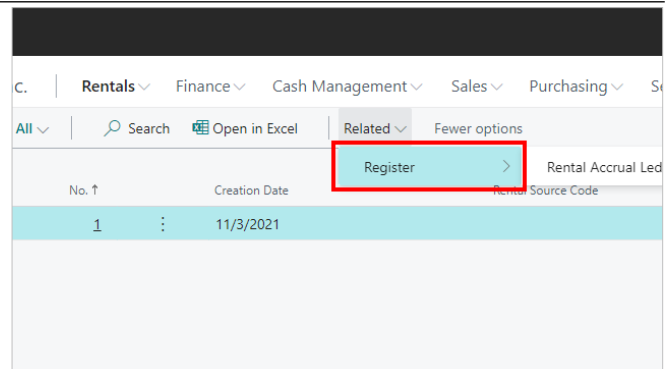
CRONUS Rentals, Inc. | Rentals | Finance | Cash Management | Sales | Purchasing | Setup & Extensions					
Rental Accrual Registers: All | Search | Open in Excel | Related | Fewer options					
No. ↑	Creation Date	Rental Source Code	From Entry No.	To Entry No.	
1	11/3/2021		1	16	

Click on the navigation menu item popup **Related**



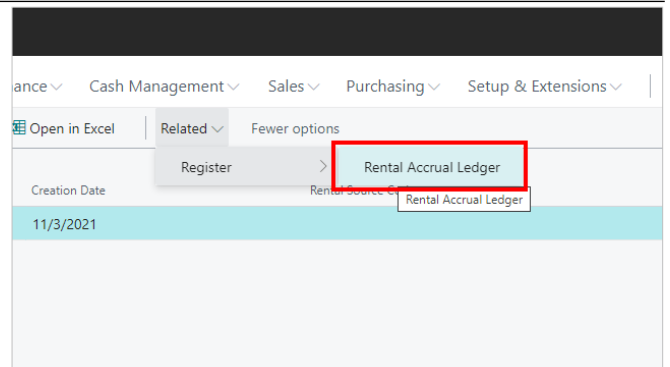
No. ↑	Creation Date	Rental Source Code
1	11/3/2021	

Click on the navigation menu item popup **Register**



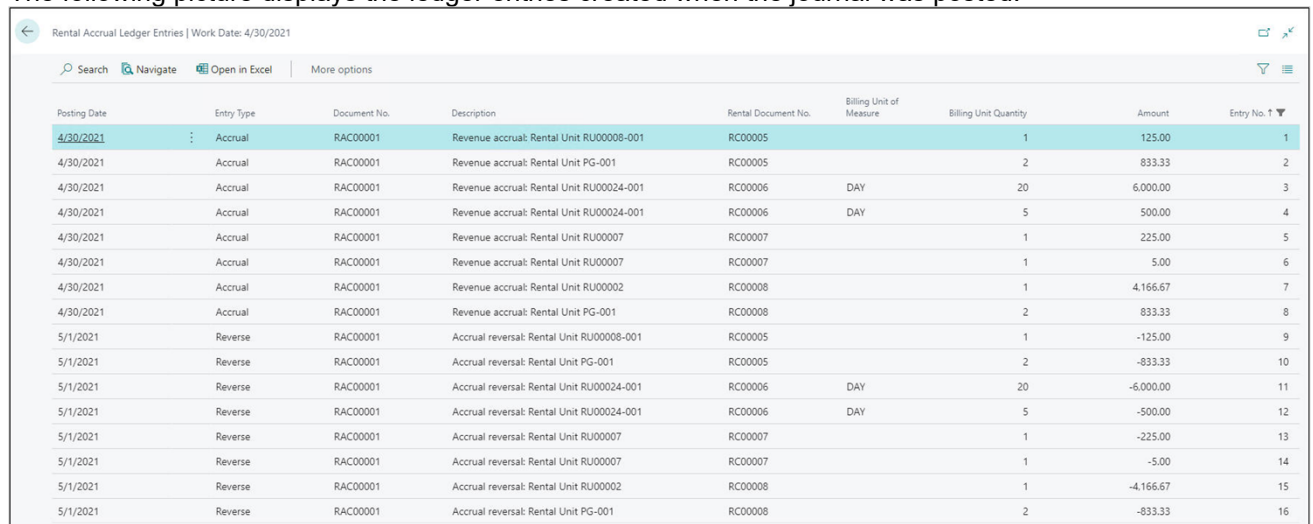
No. ↑	Creation Date	Rental Source Code
1	11/3/2021	

Click on the navigation menu item **Rental Accrual Ledger**



Creation Date	Rental Source Code
11/3/2021	

The following picture displays the ledger entries created when the journal was posted.



Posting Date	Entry Type	Document No.	Description	Rental Document No.	Billing Unit of Measure	Billing Unit Quantity	Amount	Entry No. ↑
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00008-001	RC00005		1	125.00	1
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit PG-001	RC00005		2	833.33	2
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00024-001	RC00006	DAY	20	6,000.00	3
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00024-001	RC00006	DAY	5	500.00	4
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00007	RC00007		1	225.00	5
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00007	RC00007		1	5.00	6
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit RU00002	RC00008		1	4,166.67	7
4/30/2021	Accrual	RAC00001	Revenue accrual: Rental Unit PG-001	RC00008		2	833.33	8
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00008-001	RC00005		1	-125.00	9
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit PG-001	RC00005		2	-833.33	10
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00024-001	RC00006	DAY	20	-6,000.00	11
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00024-001	RC00006	DAY	5	-500.00	12
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00007	RC00007		1	-225.00	13
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00007	RC00007		1	-5.00	14
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit RU00002	RC00008		1	-4,166.67	15
5/1/2021	Reverse	RAC00001	Accrual reversal: Rental Unit PG-001	RC00008		2	-833.33	16

Menu options:

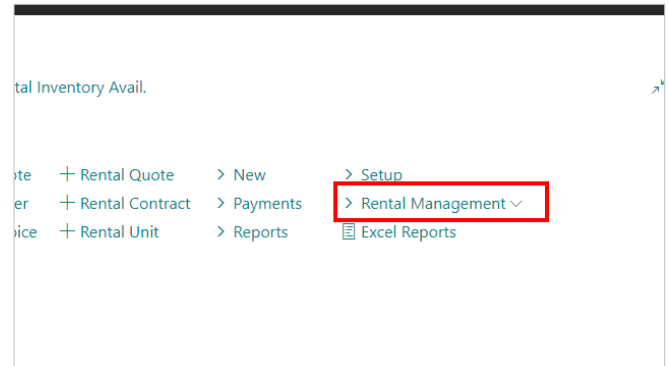
- Navigate on the left side Displays a listing of the related entries, where the G/L entries can be reviewed by a variety of methods. The entries can be viewed by clicking on the number in the No. of Entries column, selecting Process – Show Related Entries or Actions – process – Show Related Entries. More options on the right:

- Related - Navigate - Entry - Dimensions displays the Dimensions related to the selected record.
- Actions - Navigate is the same as the Navigate on the left side above.

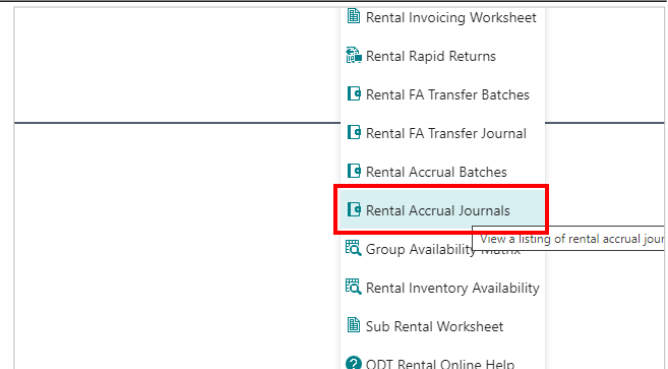
4.13.4.9. Processing Rental Accrual Journal for May

The following demonstrates the processing of the rental accrual journal for the following accounting period, May after any applicable invoicing of the rental contracts.

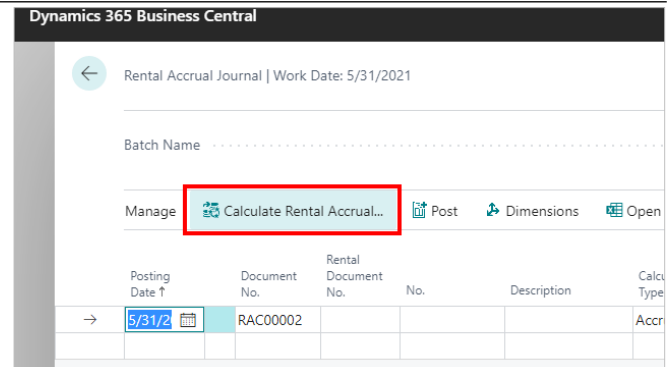
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Accrual Journals**

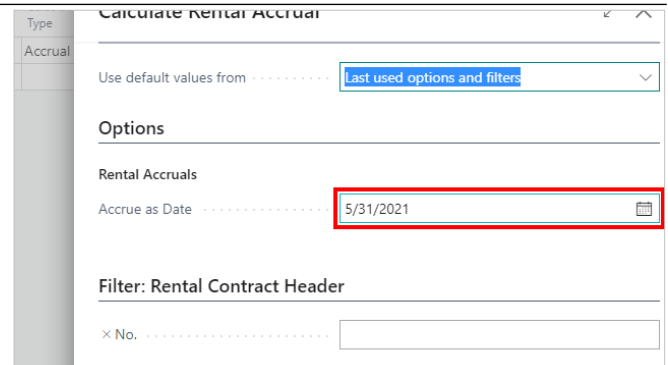


Click on the navigation menu item **Calculate Rental Accrual...**

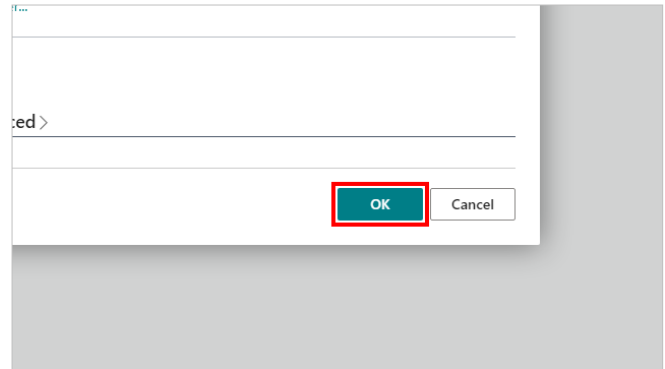


Click on the field **Accrue as Date**

Ensure the date is set to the last day of the accounting period for which the journal is being ran for.



Click on the button **OK**



The following picture displays the records calculated for the month ending May 31. The lines are sorted first on Posting Date, then on Rental Document No. , thus displaying the reversal entries of the May accruals after the accrual lines for May. The Reversal records have a Posting Date of June1 as per the Reversal Date Calculation selected on Rental Management Setup is First Day of Accrual.

Posting Date	Document No.	Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned	Rental Return Date	Rental Terms Code	Number of Days	Days to Accrue	Starting Date-Time	Ending Date-Time	Billing Unit Quantity	Line Discount %	Line Discount Amount	Unit Price
5/31/2021	RAC00002	RC00005	RU00008-001	Revenue accrual: ...	Accrual	125.81	0.00	5/5/2021	0		MONTH-PEND	31	26	5/6/2021 12:00 AM	5/31/2021 11:59 ...	1	0	0.00	150.00
5/31/2021	RAC00002	RC00005	PG-001	Revenue accrual: ...	Accrual	838.71	0.00	5/5/2021	0		MONTH-PEND	31	26	5/6/2021 12:00 AM	5/31/2021 11:59 ...	2	0	0.00	500.00
5/31/2021	RAC00002	RC00006	RU00024-001	Revenue accrual: ...	Accrual	6,240.00	0.00	5/5/2021	0		MONTH-PEND	1	26	5/6/2021 12:00 AM	5/31/2021 11:59 ...	20.8	0	0.00	300.00
5/31/2021	RAC00002	RC00006	RU00024-001	Revenue accrual: ...	Accrual	520.00	0.00	5/5/2021	0		MONTH-PEND	1	26	5/6/2021 12:00 AM	5/31/2021 11:59 ...	5.2	0	0.00	100.00
5/31/2021	RAC00002	RC00007	RU00007	Revenue accrual: ...	Accrual	175.00	0.00	5/20/2021	0		DAY-PEND	1	7	5/21/2021 12:00 ...	5/31/2021 11:59 ...	1	0	0.00	25.00
5/31/2021	RAC00002	RC00007	RU00007	Revenue accrual: ...	Accrual	10.00	0.00	5/20/2021	0		DAY-PEND	1	2	5/21/2021 12:00 ...	5/31/2021 11:59 ...	1	0	0.00	5.00
5/31/2021	RAC00002	RC00008	RU00002	Revenue accrual: ...	Accrual	9,032.26	0.00		0		MONTH-END	31	56	4/6/2021 12:00 AM	5/31/2021 11:59 ...	1	0	0.00	5,000.00
5/31/2021	RAC00002	RC00008	PG-001	Revenue accrual: ...	Accrual	1,806.45	0.00		0		MONTH-END	31	56	4/6/2021 12:00 AM	5/31/2021 11:59 ...	2	0	0.00	500.00
6/1/2021	RAC00002	RC00005	RU00008-001	Accrual reversal: ...	Reversal	-125.81	0.00	5/5/2021	0		MONTH-PEND	0	0			1	0	0.00	150.00
6/1/2021	RAC00002	RC00005	PG-001	Accrual reversal: ...	Reversal	-838.71	0.00	5/5/2021	0		MONTH-PEND	0	0			2	0	0.00	500.00
6/1/2021	RAC00002	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-6,240.00	0.00	5/5/2021	0		MONTH-PEND	0	0			20.8	0	0.00	300.00
6/1/2021	RAC00002	RC00006	RU00024-001	Accrual reversal: ...	Reversal	-520.00	0.00	5/5/2021	0		MONTH-PEND	0	0			5.2	0	0.00	100.00
6/1/2021	RAC00002	RC00007	RU00007	Accrual reversal: ...	Reversal	-175.00	0.00	5/20/2021	0		DAY-PEND	0	0			1	0	0.00	25.00
6/1/2021	RAC00002	RC00007	RU00007	Accrual reversal: ...	Reversal	-10.00	0.00	5/20/2021	0		DAY-PEND	0	0			1	0	0.00	5.00
6/1/2021	RAC00002	RC00008	RU00002	Accrual reversal: ...	Reversal	-9,032.26	0.00		0		MONTH-END	0	0			1	0	0.00	5,000.00
6/1/2021	RAC00002	RC00008	PG-001	Accrual reversal: ...	Reversal	-1,806.45	0.00		0		MONTH-END	0	0			2	0	0.00	500.00

The Accrual Amounts for May are calculated in the same manner as calculated for April.

RC00005 MONTH-PEND:

The Number of Days is 31 as May has 31 days. The days to accrue are May 6 – 31, which is 26 days.

- RU00008-001: $26/31 \times 1 \times 150.00 = 125.81$
- PG-001: $26/31 \times 2 \times 500.00 = 838.71$

RC00006 Periodic Usage and Standby Charges:

The Periodic Usage and Standby Charges were invoiced up to May 5, therefore for May accruals the Days to Accrue are 26 for May 6 – 31.

- RU000024-001 Periodic Usage: $26 \times 0.8 \times 1 \times 300.00 = 6240.00$
- RU000024-001 Standby Charges: $11 \times 0.2 \times 2 \times 100.00 = 520.00$

RC00007 DAY-PEND with Rental Calendar:

The rental was invoiced up to May 20 leaving 11 days for May 21-31. In the calendar, May 23 and 30 are flagged as Non-billable and May 22 and 29 are flagged as Use Standby Price.

Therefore the billable number of days to accrue for the rental price in May are $11 - 4 \text{ days} = 7$. And Standby price days = 2.

- RU00007 Rental Price: $7 \times 1 \times 25.00 = 175.00$
- RU00007 Standby Price: $2 \times 1 \times 5.00 = 10.00$

RC00008 EMONTH:

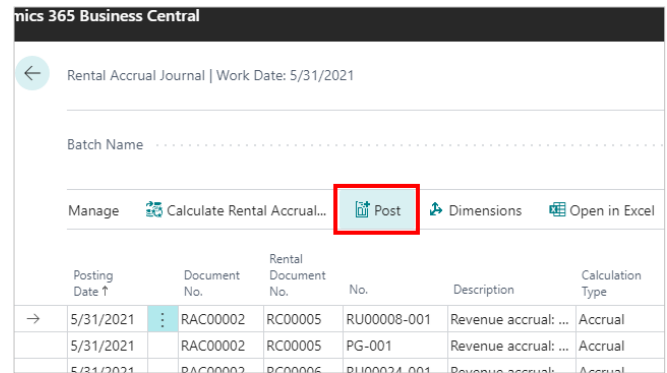
The Days to Accrue for May 31 is based on the number of days from April 6 – May 31, which is 56 days. The number of days is based on the number of days in May, which is 31.

- RU00002: $56/31 \times 1 \times 5000.00 = 9032.26$
- PS-001: $56/31 \times 2 \times 500.00 = 1806.45$

The Test Report can be reviewed or printed prior to posting the journal.

The following steps demonstrate the posting of the journal.

Click on the navigation menu item **Post**



Microsoft 365 Business Central

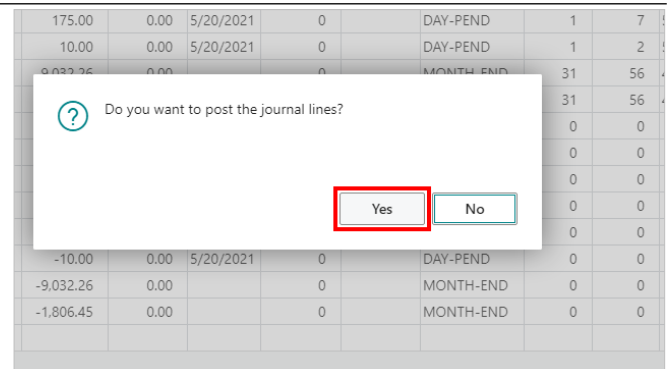
Rental Accrual Journal | Work Date: 5/31/2021

Batch Name

Manage Calculate Rental Accrual... **Post** Dimensions Open in Excel

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type
→ 5/31/2021	RAC00002	RC00005	RU00008-001	Revenue accrual: ...	Accrual
5/31/2021	RAC00002	RC00005	PG-001	Revenue accrual: ...	Accrual
5/31/2021	RAC00002	RC00006	BU00004-001	Revenue accrual: ...	Accrual

Click on the button **Yes**

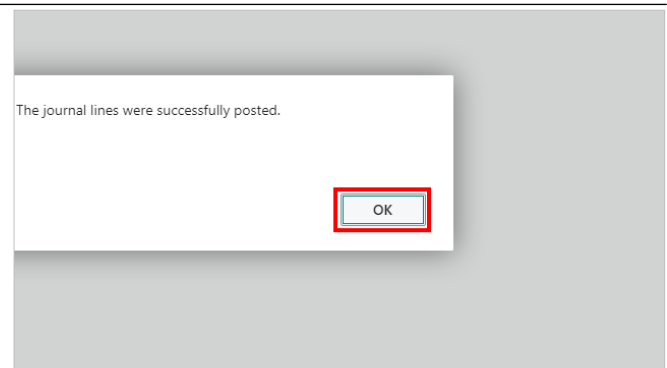


Do you want to post the journal lines?

Yes No

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type
175.00	0.00	5/20/2021	0	DAY-PEND	1 7
10.00	0.00	5/20/2021	0	DAY-PEND	1 2
9,032.26	0.00		0	MONTH-END	31 56
			0		31 56
			0		0 0
			0		0 0
			0		0 0
			0		0 0
-10.00	0.00	5/20/2021	0	DAY-PEND	0 0
-9,032.26	0.00		0	MONTH-END	0 0
-1,806.45	0.00		0	MONTH-END	0 0

Click on the button **OK**



The journal lines were successfully posted.

OK

Should all invoicing be completed in June and the rental units returned in June, then there should be no records generated when running the Calculate Rental Accrual at the end of June.

4.13.5. How to Process a Rental Accrual Journal for Deferrals

4.13.5.1. Overview

The following chapters will demonstrate the calculation of the deferral amounts for the pricing schemas for the Invoicing Types of Start and Periodic Start.

All the rental contracts included have the same Rental Start Date and Rental Return Date with different rental terms.

The formula for calculating the deferral amounts for the Rental Price is:

Days to Accrue divided by the Number of Days times the Billing Unit Qty. times the Unit Price.

When a rental term on the rental lines is not prorated, then the Billing Unit Qty. displays the extended quantity from the Rental Amount Lines related to the unit.

When a rental term on the rental line has Prorate, All Periods, the Billing Unit Qty. displays the prorated quantity. The prorated quantity is calculated as Days to Accrue divided by Number of Days times the rental quantity from the rental lines, the same as on the Rental Amount Lines.

NOTE:

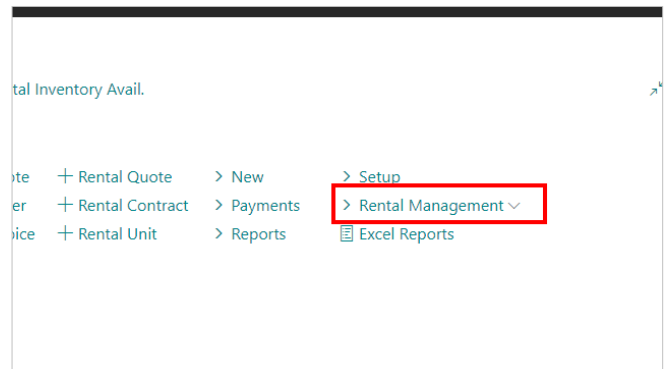
The processing of the Rental Accrual Journal does not have to be done separately for accruals and deferrals.

4.13.5.2. Processing Rental Deferrals

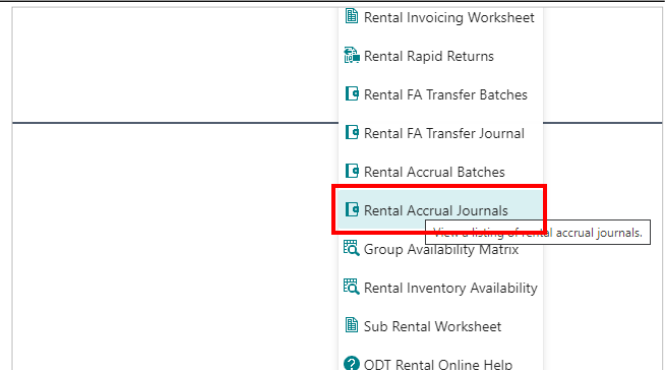
The following demonstrates the processing of deferrals at the end of April.

Both of the rental contracts have a starting date of April 6 and an expected return date of June 5 and have had an invoice posted on April 6.

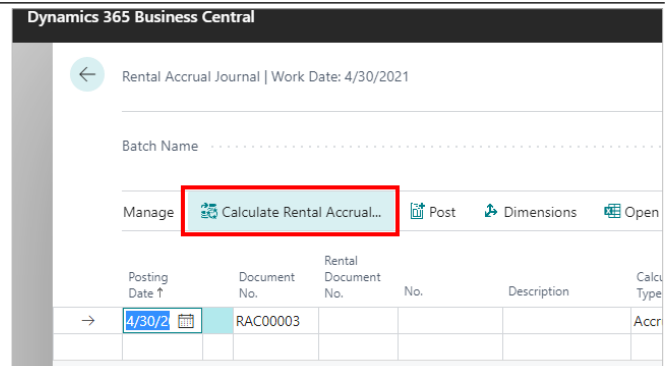
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Accrual Journals**



Click on the navigation menu item **Calculate Rental Accrual...**





ODT Rentals Online Help

Click on the field **Accrue as Date**

Select or enter the last day of the accounting period for which the rental accrual journal is being ran for.

Calculate Rental Accrual

Type: Accrual

Use default values from: Last used options and filters

Options

Rental Accruals

Accrue as Date: 5/31/2021

Filter: Rental Contract Header

× No.:

Click on the link **Open the date picker for Accrue as Date**

Calculate Rental Accrual

Type: Accrual

Use default values from: Last used options and filters

Options

Rental Accruals

Accrue as Date: 5/31/2021

Filter: Rental Contract Header

× No.:

Click on the link **Previous**

Calculate Rental Accrual

Type: Accrual

Use default values from: Last used options and filters

Options

Rental Accruals

Accrue as Date: 5/31/2021

Filter: Rental Contract Header

× No.:

Click on a date in the calendar

Calculate Rental Accrual

Type: Accrual

Use default values from: Last used options and filters

Options

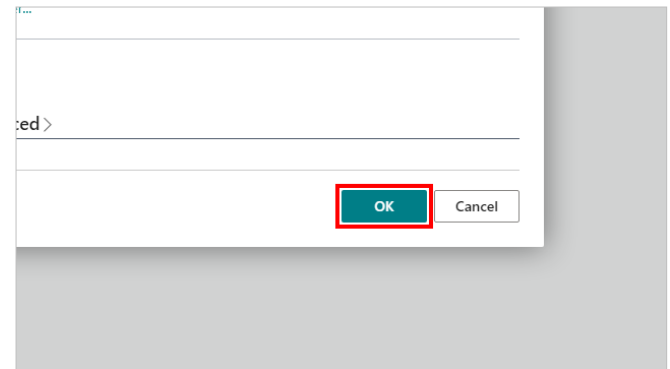
Rental Accruals

Accrue as Date: 5/31/2021

Filter: Rental Contract Header

× No.:

Click on the button **OK**



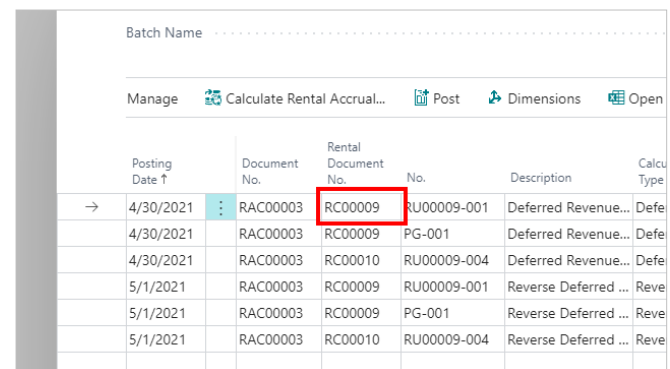
The following picture displays the journal lines created for all the rental contracts that have rental revenue to be deferred on April 30 and the reversing entries with a Posting Date of May 1.

Posting Date ↑	Document No.	Rental Document No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned	Rental Return Date	Rental Terms Code	Number of Days	Days to Accrue	Starting Date-Time	Ending Date-Time	Billing Unit Quantity	Line Discount %	Line Discount Amount	Unit Price
4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021	0	MONTH-PST...	30	-5	5/5/2021 12:00 AM	4/30/2021 11:59 ...	1	0	0.00	150.00
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021	0	MONTH-PST...	30	-5	5/5/2021 12:00 AM	4/30/2021 11:59 ...	3	0	0.00	500.00
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021	0	MONTH-START	61	-36	6/5/2021 12:00 AM	4/30/2021 11:59 ...	1	0	0.00	150.00
5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	25.00	4/6/2021	0	MONTH-PST...	0	0			1	0	0.00	150.00
5/1/2021	RAC00003	RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	250.00	4/6/2021	0	MONTH-PST...	0	0			3	0	0.00	500.00
5/1/2021	RAC00003	RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	177.05	4/6/2021	0	MONTH-START	0	0			1	0	0.00	150.00

4.13.5.3. Deferral Amount Calculation for the Monthly Periodic Start Contract

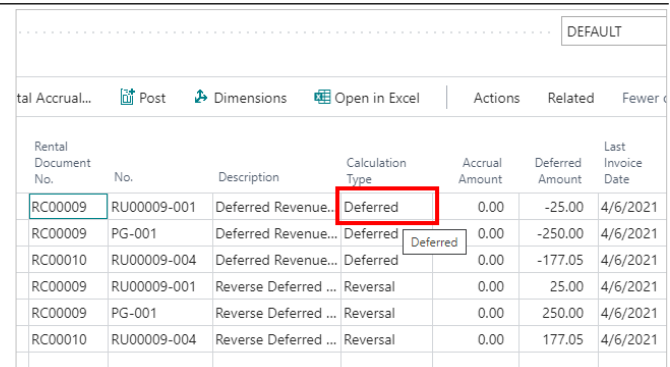
The following shows the deferral records for RC00009.

Click on the cell **Rental Document No.** with the value **RC00009**



Batch Name	Document No.	Rental Document No.	No.	Description	Calculation Type
→	4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...
	4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...
	4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...
	5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...
	5/1/2021	RAC00003	RC00009	PG-001	Reverse Deferred ...
	5/1/2021	RAC00003	RC00010	RU00009-004	Reverse Deferred ...

Click on the cell **Calculation Type** with the value **Deferred**



Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	25.00	4/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	250.00	4/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	177.05	4/6/2021

The following shows the reversal records for the April deferral records for RC00009.



Click on the cell **Rental Document No.** with the value **RC00009**

Manage Calculate Rental Accrual... Post Dimensions Open						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calcu Type	
→ 4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Defer	
5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00009	PG-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Reversal**

Calculate Rental Accrual... Post Dimensions Open in Excel Actions Related Fewer						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	25.00	4/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	250.00	4/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	177.05	4/6/2021

The following describes how the Deferral Amount was calculated for the Rental Units on Rental Contract RC00009, which have the Rental Term of MONTH-PSTART.

The invoice for the first rental period was posted on April 6. The amount excl. tax for unit RU00009-001 was 150.00 and for PG-001 was 500.00.

The Deferral Amount formula is:

Days to Accrue divided by Number of Days times Billing Unit Qty. times the amount excluding tax that was invoiced.

For deferrals the Days to Accrue will be a negative number.

- The Days to Accrue is -5, which is the number of days including the Starting Date-Time, May 5, through to and including the Ending Date-Time, April 30.
- Number of Days is 30 for the month of April. The calculations for the units are as follows:
- RU00009-001: Deferral Amount: $5/30 \times 1 \times 150.00 = -25.00$
- PG-001 Deferral Amount: $5/30 \times 3 \times 500.00 = -250.00$

4.13.5.4. Deferral Amount Calculation for the Monthly Contract with Billing at the Start

The following shows the deferral records for RC00010.



Click on the cell **Rental Document No.** with the value **RC00010**

Manage Calculate Rental Accrual... Post Dimensions Open						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calcu Type	
4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Defer	
→ 5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00009	PG-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Deferred**

Calculate Rental Accrual... Post Dimensions Open in Excel Actions Related Fewer						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	25.00	4/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	250.00	4/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	177.05	4/6/2021

The following shows the reversal records for the April deferral records for RC00010.

Click on the cell **Rental Document No.** with the value **RC00010**

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calcu Type	
4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Defer	
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Defer	
→ 5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00009	PG-001	Reverse Deferred ...	Reve	
5/1/2021	RAC00003	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Reversal**

Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	25.00	4/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	250.00	4/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	177.05	4/6/2021

The following describes how the Deferral Amount was calculated for the Rental Unit record for Rental Contract RC00010, which have the Rental Term of MONTH-START.

The invoice for the full contract was posted on April 6. The amount excluding tax on the invoice was 300.00.

The Deferral Amount formula is:

Days to Accrue divided by Number of Days times Billing Unit Qty. times the amount excluding tax that was invoiced.



- The Days to Accrue is -36, which is the number of days including the Starting Date-Time, June 5, through to and including the Ending Date-Time, April 30.
- Number of Days is the sum of the days that were included in the April 6 invoice. The days included are from April 6 to June 5. April = 25 days, May = 31 and June = 5 which equals 61 days. The calculation for the deferral amount for the unit is as follows:
- RU00009-004: Deferral Amount: $-36/61 \times 1 \times 300.00 = -177.05$

4.13.5.5. Running the Test Report

A test report can be sent to PDF, printed or previewed prior to posting the journal.
The following demonstrates the steps for running the report.

Click on the navigation menu item popup **Related**

DEFAULT							
Dimensions	Open in Excel	Actions	Related	Fewer options			
Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned	Rental Return Date	Rent
Deferred Revenue...	Deferred	0.00	-25.00	4/6/2021	0		MON
Deferred Revenue...	Deferred	0.00	-250.00	4/6/2021	0		MON
Deferred Revenue...	Deferred	0.00	-177.05	4/6/2021	0		MON

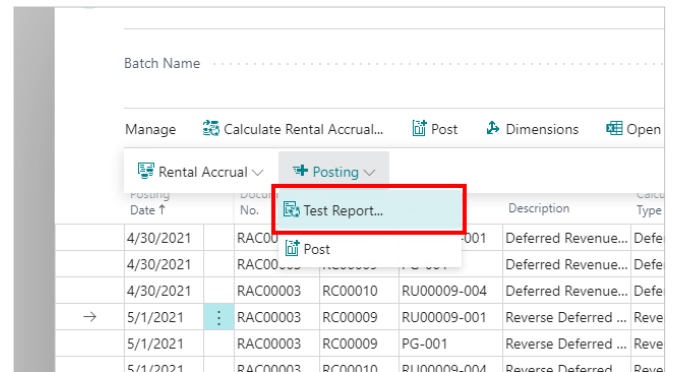
Click on the navigation menu item popup **Actions**

DEFAULT							
Post	Dimensions	Open in Excel	Actions	Related	Fewer options		
Description	Calculation Type	Accrual Amount	Deferred Amount	Invoice Date	Qty. Returned	Rental Return Date	Rent
0009-001	Deferred Revenue...	0.00	-25.00	4/6/2021	0		
001	Deferred Revenue...	0.00	-250.00	4/6/2021	0		
0009-004	Deferred Revenue...	0.00	-177.05	4/6/2021	0		

Click on the navigation menu item popup **Posting**

Rental Accrual Journal | Work Date: 4/30/2021							
Batch Name							
Manage Calculate Rental Accrual... Post Dimensions Open							
Rental Accrual Posting Posting							
Posting Date	No.	No.	No.	Description	Type		
4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Defer		
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Defer		
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Defer		
→ 5/1/2021	RAC00003	RC00009	RU00009-001	Reverse Deferred ...	Reve		

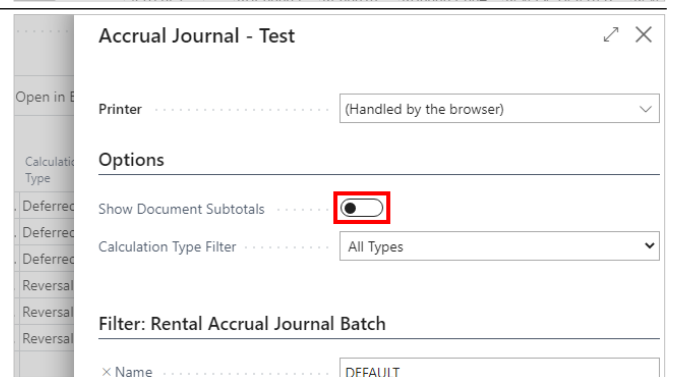
Click on the navigation menu item **Test Report...**



The screenshot shows a web application interface with a navigation menu on the left and a main content area. The 'Test Report...' button is highlighted in a red box. The main content area displays a table with columns for Posting Date, No., Description, and Type. The table contains several rows of data, including dates like 4/30/2021 and 5/1/2021, and various codes and descriptions related to rental accruals.

Click on the toggle field **Show Document Subtotals**

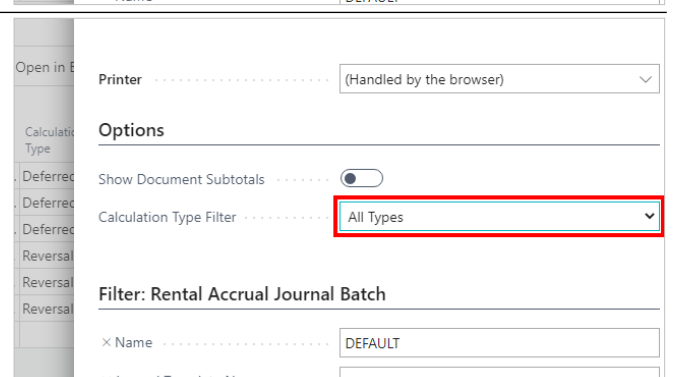
When Show Document Subtotals is enabled, then a subtotal per rental contract will print, when the amount is not 0.00.



The screenshot shows a window titled 'Accrual Journal - Test'. It has a 'Printer' dropdown set to '(Handled by the browser)'. Under the 'Options' section, the 'Show Document Subtotals' toggle switch is highlighted in a red box and is currently turned on. Below it, the 'Calculation Type Filter' is set to 'All Types'. At the bottom, there is a 'Filter: Rental Accrual Journal Batch' section with a 'Name' dropdown set to 'DEFAULT'.

Click on the field **Calculation Type Filter**

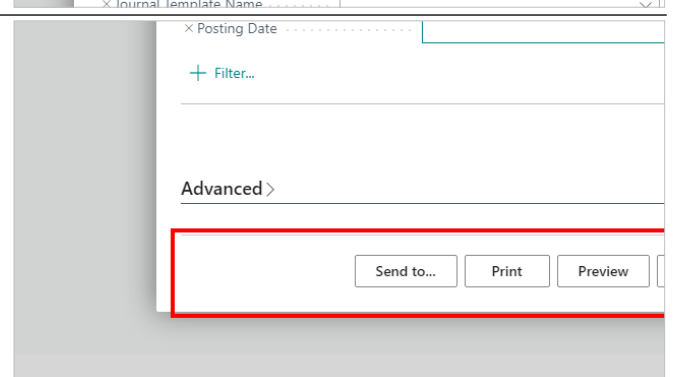
The Calculation Type Filter field provides the flexibility to choose whether all types or only a specific type is to be included in the report. The options include All Types, Accrual, Deferred and Reversal.



This screenshot is identical to the previous one, showing the 'Accrual Journal - Test' window. In this view, the 'Calculation Type Filter' dropdown menu is highlighted in a red box, showing 'All Types' as the selected option.

Click on **Send to... Print Preview Cancel**

Select the preferred method for reviewing the test report.



The screenshot shows the 'Advanced' section of the 'Accrual Journal - Test' window. It includes a 'Posting Date' field and a '+ Filter...' button. At the bottom, a red box highlights three buttons: 'Send to...', 'Print', and 'Preview'.

The following picture displays the test report with the Show Document Subtotals enabled.



Accrual Journal - Test										Thursday, November 4, 2021		
CRONUS Rentals, Inc.										Page 1		
										ODT\ASTAPLETON		
Posting Date	Document No.	Rental Document No.	Calculation Type	Quantity	Unit Price	Accrual Amount	Deferred Amount	Rental Term	Number of Days	Days to Accrue	Last Invoice Date	Rental Return Date
04/30/21	RAC00003	RC00009	Deferred	1.00	150.00		-25.00	MONTH-PSTART	30	-5	4/6/2021	
05/01/21	RAC00003	RC00009	Reversal	1.00	150.00		25.00	MONTH-PSTART		0	4/6/2021	
04/30/21	RAC00003	RC00009	Deferred	3.00	500.00		-250.00	MONTH-PSTART	30	-5	4/6/2021	
05/01/21	RAC00003	RC00009	Reversal	3.00	500.00		250.00	MONTH-PSTART		0	4/6/2021	
Total for: RC00009												
04/30/21	RAC00003	RC00010	Deferred	1.00	150.00		-177.05	MONTH-START	61	-36	4/6/2021	
05/01/21	RAC00003	RC00010	Reversal	1.00	150.00		177.05	MONTH-START		0	4/6/2021	
Total for: RC00010												
Report Total												

4.13.5.6. Posting the April Rental Accrual Journal

The following demonstrates the posting of the April journal.

Click on the navigation menu item **Post**

Microsoft Dynamics 365 Business Central

Rental Accrual Journal | Work Date: 4/30/2021

Batch Name

Manage Calculate Rental Accrual... **Post** Dimensions Open in Excel

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type
4/30/2021	RAC00003	RC00009	RU00009-001	Deferred Revenue...	Deferred
4/30/2021	RAC00003	RC00009	PG-001	Deferred Revenue...	Deferred
4/30/2021	RAC00003	RC00010	RU00009-004	Deferred Revenue...	Deferred

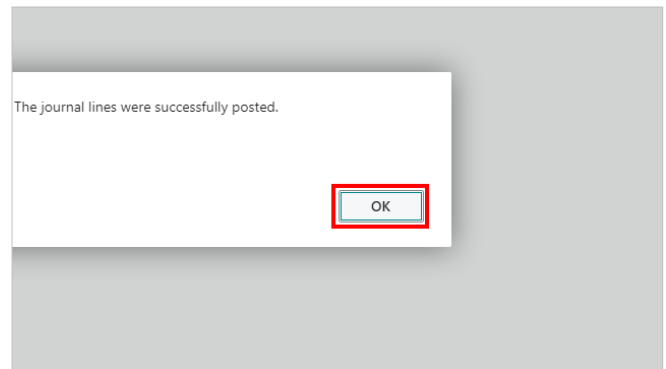
Click on the button **Yes**

0.00	250.00	4/6/2021	0		MONTH-PSTART	0
0.00	177.05	4/6/2021	0		MONTH-START	0

Do you want to post the journal lines?

Yes No

Click on the button **OK**



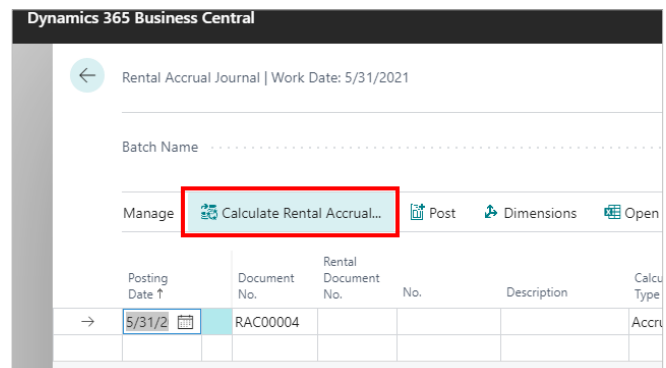
For information on accessing the Rental Accrual Registers and reviewing the ledger entries, see the How to Process a Rental Accrual Journal for Accruals help.

4.13.5.7. Processing Rental Accrual Journal for May

The following demonstrates the processing of the rental accrual journal for the following accounting period, May.

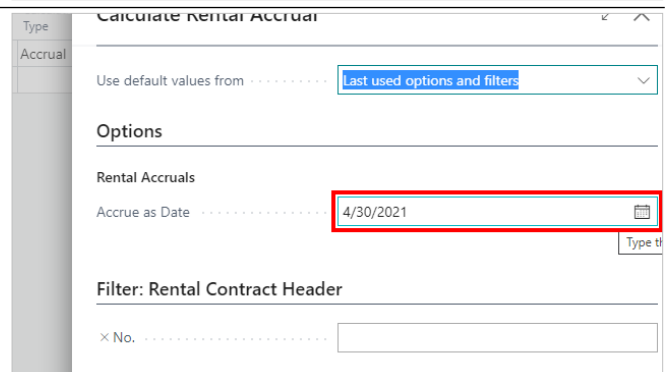
The rental contract RC00009 with periodic invoicing has been invoiced on May 6 for the second rental period.

Click on the navigation menu item **Calculate Rental Accrual...**

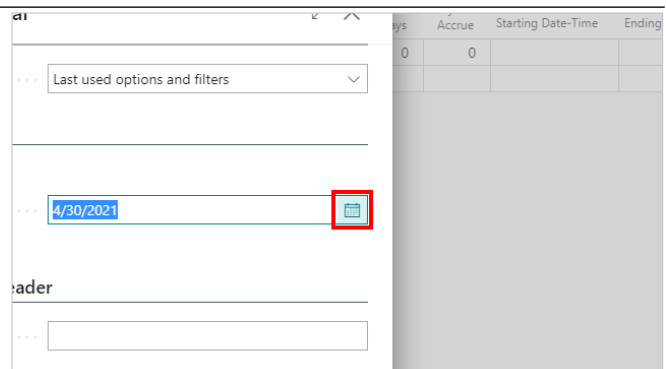


Click on the field **Accrue as Date**

Enter or look-up and select May 31.



Click on the link **Open the date picker for Accrue as Date**





ODT Rentals Online Help

Click on the link **Next**

Click on a date in the calendar

Click on the button **OK**

The following picture displays the records calculated for the month ending May 31. The lines are sorted first on Posting Date, then on Rental Document No., thus displaying the entries of the May deferrals before the reversing journal lines for the May deferrals. The Reversal records have a Posting Date of June 1 as per the Reversal Date Calculation selected on Rental Management Setup is First Day of Accrual.

Posting Date	Document No.	Rental Document No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date	Qty. Returned	Rental Return Date	Rental Terms Code	Number of Days	Days to Accrue	Starting Date-Time	Ending Date-Time	Billing Unit Quantity	Line Discount %	Line Discount Amount	Unit Price
5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-24.19	5/6/2021	0	MONTH-PSTART	31	-5	6/5/2021 12:00 AM	5/31/2021 11:59 ...	1	0	0.00	150.00
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-241.94	5/6/2021	0	MONTH-PSTART	31	-5	6/5/2021 12:00 AM	5/31/2021 11:59 ...	3	0	0.00	500.00
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-24.59	4/6/2021	0	MONTH-START	61	-5	6/5/2021 12:00 AM	5/31/2021 11:59 ...	1	0	0.00	150.00
6/1/2021	RAC00004	RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	24.19	5/6/2021	0	MONTH-PSTART	0	0			1	0	0.00	150.00
6/1/2021	RAC00004	RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	241.94	5/6/2021	0	MONTH-PSTART	0	0			3	0	0.00	500.00
6/1/2021	RAC00004	RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	24.59	4/6/2021	0	MONTH-START	0	0			1	0	0.00	150.00



4.13.5.8.

Deferral Amount Calculations for May 31

Click on the cell **Rental Document No.** with the value **RC00009**

Batch Name						
Manage Calculate Rental Accrual... Post Dimensions Open						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type	
→ 5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Defer	
6/1/2021	RAC00004	RC00009	RU00009-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00009	PG-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Deferred**

DEFAULT						
Calculate Rental Accrual... Post Dimensions Open in Excel Actions Related Fewer						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-24.19	5/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-241.94	5/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-24.59	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	24.19	5/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	241.94	5/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	24.59	4/6/2021

Click on the cell **Rental Document No.** with the value **RC00009**

Manage Calculate Rental Accrual... Post Dimensions Open						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type	
→ 5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Defer	
6/1/2021	RAC00004	RC00009	RU00009-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00009	PG-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Reversal**

Calculate Rental Accrual... Post Dimensions Open in Excel Actions Related Fewer						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-24.19	5/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-241.94	5/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-24.59	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	24.19	5/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	241.94	5/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	24.59	4/6/2021



Click on the cell **Rental Document No.** with the value **RC00010**

Manage Calculate Rental Accrual... Post Dimensions Open						
Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calcu Type	
5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Defer	
→ 6/1/2021	RAC00004	RC00009	RU00009-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00009	PG-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Deferred**

Calculate Rental Accrual... Post Dimensions Open in Excel Actions Related Fewer						
Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-24.19	5/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-241.94	5/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-24.59	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	24.19	5/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	241.94	5/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	24.59	4/6/2021

Click on the cell **Rental Document No.** with the value **RC00010**

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calcu Type	
5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Defer	
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Defer	
→ 6/1/2021	RAC00004	RC00009	RU00009-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00009	PG-001	Reverse Deferred ...	Reve	
6/1/2021	RAC00004	RC00010	RU00009-004	Reverse Deferred ...	Reve	

Click on the cell **Calculation Type** with the value **Reversal**

Rental Document No.	No.	Description	Calculation Type	Accrual Amount	Deferred Amount	Last Invoice Date
RC00009	RU00009-001	Deferred Revenue...	Deferred	0.00	-24.19	5/6/2021
RC00009	PG-001	Deferred Revenue...	Deferred	0.00	-241.94	5/6/2021
RC00010	RU00009-004	Deferred Revenue...	Deferred	0.00	-24.59	4/6/2021
RC00009	RU00009-001	Reverse Deferred ...	Reversal	0.00	24.19	5/6/2021
RC00009	PG-001	Reverse Deferred ...	Reversal	0.00	241.94	5/6/2021
RC00010	RU00009-004	Reverse Deferred ...	Reversal	0.00	24.59	4/6/2021

On the reversal records for the prior month deferrals, the Deferred Amount will be a positive.

The Deferred Amounts for May are calculated in the same manner as calculated for April.

RC000009 MONTH-PSTART:

The Number of Days is 31 as May has 31 days. The Days to Accrue are June 1-6, which is 5 days.

- RU00009-001: $-5/31 \times 1 \times 150.00 = -24.19$
- PG-001: $-5/31 \times 3 \times 500.00 = -241.94$

RC000010 MONTH-START:

- The Days to Accrue is -5, which is the number of days including the Starting Date-Time, June 5, through to

and including the Ending Date-Time, May 31.

- Number of Days is the sum of the days that were included in the April 6 invoice. The days included are from April 6 to June 5. April = 25 days, May = 31 and June = 5 which equals 61 days.

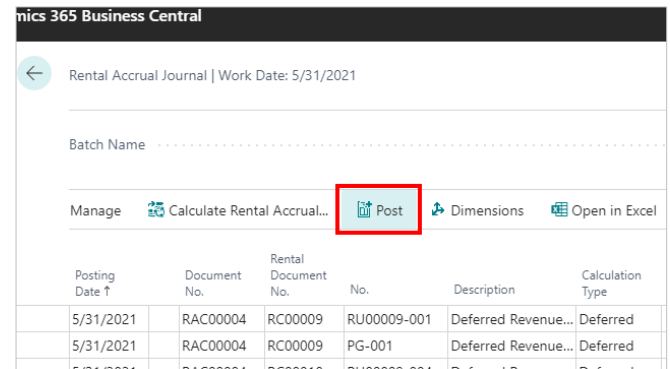
The calculation for the deferral amount for the unit for May 31 is as follows:

- RU00009-004: Deferral Amount: $-5/61 \times 1 \times 300.00 = -24.59$

The Test Report can be reviewed or printed prior to posting the journal.

The following steps demonstrate the posting of the journal.

Click on the navigation menu item **Post**



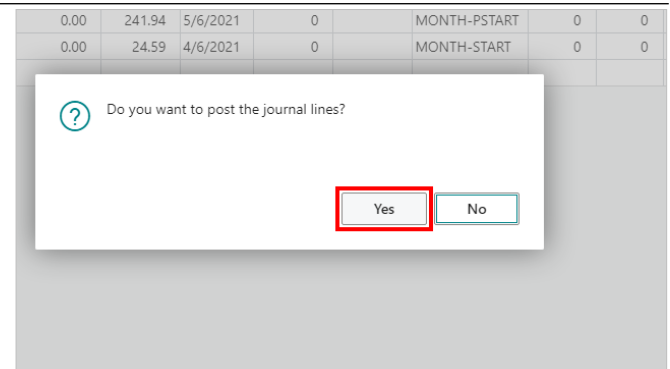
Rental Accrual Journal | Work Date: 5/31/2021

Batch Name

Manage Calculate Rental Accrual... **Post** Dimensions Open in Excel

Posting Date ↑	Document No.	Rental Document No.	No.	Description	Calculation Type
5/31/2021	RAC00004	RC00009	RU00009-001	Deferred Revenue...	Deferred
5/31/2021	RAC00004	RC00009	PG-001	Deferred Revenue...	Deferred
5/31/2021	RAC00004	RC00010	RU00009-004	Deferred Revenue...	Deferred

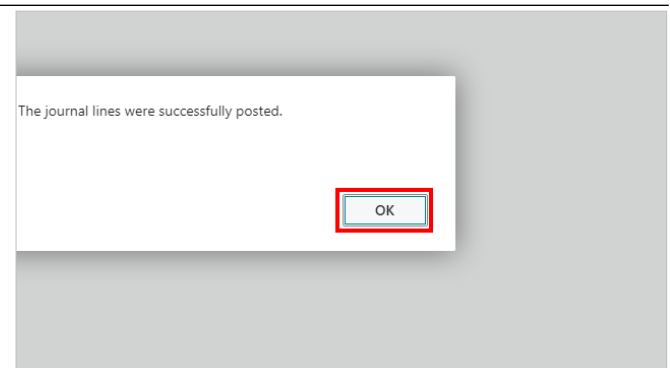
Click on the button **Yes**



Do you want to post the journal lines?

Yes No

Click on the button **OK**



The journal lines were successfully posted.

OK

4.14.Rental Line Discounts

4.14.1. Rental Line Discounts

4.14.1.1. Overview

Organizations may provide different rental discounts percentages to different customers or may prefer to provide discounts on a quote or contract basis.

ODT Rentals contains the capability to provide rental line discounts for both of these scenarios.

Line discount percentages can be based on whether the rental units are not linked or are linked to a fixed asset, an inventory item, a resource, a G/L account, or a rental package as a whole.

4.14.1.2. Rental Line Discounts Setup

Customer Cards:

In order for the rental line discounts to be used, then on the customer card, Invoice Tab the Allow Line Disc. field must be enabled.

The Customer cards, Rental tab has been enhanced to provide the ability to specify default line discount percentages, which will default to the rental quote and contract Invoice Details tab. The discount percentages will default to the rental lines from the Invoice Details tab, when unit groups, units or rental packages are entered on the Rental Lines.

The fields available include:

Default Rental Disc %

- This field is used for specifying a line discount % that will be applied initially, by default, to all rental products that are to be entered on a quote or contract. When any of the following Disc. % fields are entered then they will be applied rather than the Default Rental Disc. %.

Rental Package Disc. %

- Rental Package Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field. This discount will apply the package specified discount to all component rental lines of all packages entered on the Rental Lines. This occurs, even when the units are linked to Fixed Asset, Item, Resources or G/L Accounts and these the following Disc. % fields are populated. The reasoning is that the component line pricing is used for the allocation of the rental package price, not for billing the customer.

FA Rental Unit Disc %

- The FA (Fixed Asset) Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

Item Rental Unit Disc %

- The Item Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

Resource Rental Unit Disc %

- The Resource Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

G/L Acct. Rental Unit Disc %

- The G/L Acct. Rental Unit Disc. %, when specified, will overwrite the Line Discount % when populated from the Default Rental Disc % field.

Rental Units:

For unit groups and units, the line discount field to be applied is dependent on the Link Type selected on the unit cards.

If a rental unit card for a unit or a group have the Link Type set to Fixed Asset, then if the customer card has the FA Rental Unit Disc % populated, that percentage will default to the rental line on a quote or contract for that customer.

If a rental unit card for a unit or a group do not have a Link Type specified, and the customer card has the Default Rental Disc. % populated, that percentage will default to the rental line on a quote or contract for that customer.

To enable a specific line discount percentage on rental unit groups, the Link Type field is to be selected. All assigned units automatically have the same Link Type set. On the assigned units, the Link Type field cannot be edited when the group card has a Link Type selected.



On Sub-rental units assigned to a group, the Link Code field cannot be populated. Only the assigned units can have the Link Code selected.

Rental Price Cards:

When using Rental Price cards on unit groups, units or rental packages then the Allow Line Discounts must be set to Yes in order for the Rental Line Discounts to be applied. When set to No, then when the group, unit or package is entered, the discount percentages on the Invoicing Details will not be applied to the applicable rental lines, Line Discount % field.

The following demonstrates the setup of the discount percentage fields on the Rentals tab of a Customer card.

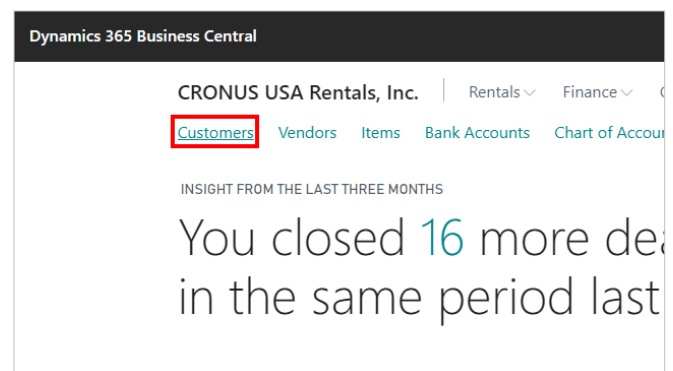
NOTE:

The discount fields to be populated based on the organizations customer discount policy.

Profile Business Manager

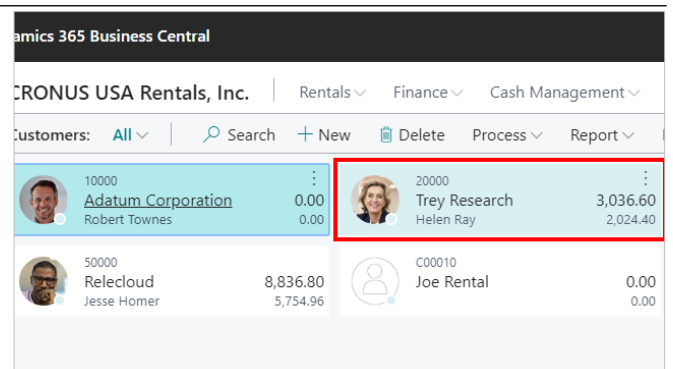
Should a user with the Sales Order Processor Profile have the Permission Set which allows for the entry or modification of Customer cards, then the following steps can be used.

Click on the navigation menu item **Customers**



Click on the data brick **No. = 20000, Name = Trey Research, Contact = Helen Ray**

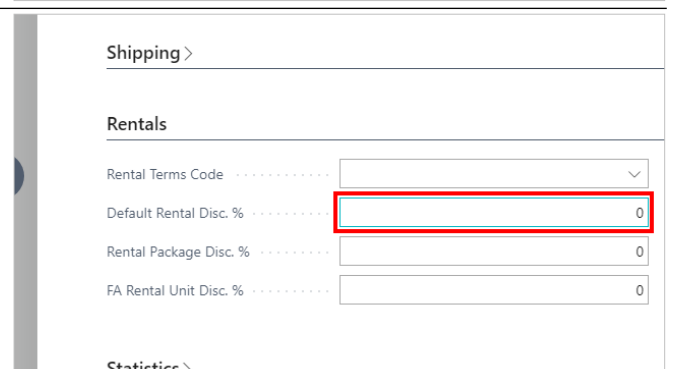
This customer has the Allow Line Disc. field enabled on the Invoicing tab.



Click on the field **Default Rental Disc. %**

Should the organization want to provide a Customer with a default line discount percentage for all rental product, then enter a percentage.

This percentage will be applied to units and groups, which do not have the Link Type field populated, and as well will be applied to units, groups and rental packages, when the other applicable rental line discount fields are not populated.





Enter the text **2**.

Shipping >

Rentals

Rental Terms Code

Default Rental Disc. %

Rental Package Disc. %

0

FA Rental Unit Disc. %

0

Statistics >

Click on the field **Rental Package Disc. %**

Should the organization be using Rental Packages and be providing the Customer with a line discount percentage specific to rental packages, then enter the percentage.
Otherwise, leave the percentage as 0.

Shipping >

Rentals

Rental Terms Code

Default Rental Disc. %

2

Rental Package Disc. %

0

FA Rental Unit Disc. %

0

Statistics >

Enter the text **3**.

Shipping >

Rentals

Rental Terms Code

Default Rental Disc. %

2

Rental Package Disc. %

0

FA Rental Unit Disc. %

0

Statistics >

Click on the field **FA Rental Unit Disc. %**

Should the organization be providing the Customer with a line discount percentage specific to Rental Units linked to a Fixed Assets, then enter the percentage.
Otherwise, leave the percentage as 0.

Rentals

Rental Terms Code

Default Rental Disc. %

2

Rental Package Disc. %

FA Rental Unit Disc. %

0

Statistics >

Special Prices & Discounts

Manage



ODT Rentals Online Help

Enter the text 4.

Rentals

Rental Terms Code

Default Rental Disc. %

Rental Package Disc. %

FA Rental Unit Disc. %

2

3

Statistics >

Special Prices & Discounts

Manage

Click on the field **Item Rental Unit Disc. %**

Should the organization be providing the Customer with a line discount percentage specific to Rental Units linked to an Item, then enter the percentage. Otherwise, leave the percentage as 0.

14 DAYS

Partial

Item Rental Unit Disc. %

Resource Rental Unit Disc. %

G/L Acct Rental Unit Disc. %

0

0

0

Enter the text 5.

14 DAYS

Partial

Item Rental Unit Disc. %

Resource Rental Unit Disc. %

G/L Acct Rental Unit Disc. %

5

0

0

Click on the field **Resource Rental Unit Disc. %**

Should the organization be providing the Customer with a line discount percentage specific to Rental Units linked to a Resource, then enter the percentage. Otherwise, leave the percentage as 0.

Partial

Item Rental Unit Disc. %

Resource Rental Unit Disc. %

G/L Acct Rental Unit Disc. %

5

0

0



ODT Rentals Online Help

Click on the field **G/L Acct Rental Unit Disc. %**

Should the organization be providing the Customer with a line discount percentage specific to Rental Units linked to a G/L Account, then enter the percentage.
Otherwise leave the percentage as 0.

Click on the back button

The following demonstrates the setting of the Link Type on a Rental Unit group.

Click on the navigation menu item **Rental Units**

Click on the link in cell **No.** with the value **RU00001**

Rental Units: All			Search	New	Manage	Process	Ren
NO. ↑		DESCRIPTION					GROUP ↑
PG-001	:	Portable Generators					
RU00007	:	165 G Brad Nailer					
BD-006	:	Buckeye Ditcher					
RU00001	:	Buckeye Ditcher Group					✓
RU00002	:	Buckeye Ditcher					
RU00003	:	Buckeye Ditcher					
RU00004	:	Buckeye Ditcher					
RU00005	:	Buckeye Ditcher					



ODT Rentals Online Help

Click on the field **Link Type**

The screenshot shows a form with several fields: 'Rental Terms Code' (MONTH-END), 'Minimum Rental Duration' (1 day), 'Group Qty.' (6), and 'Group Quote Qty.' (0.00). Below these is a section titled 'Link' with a 'Link Type' dropdown menu highlighted by a red rectangle.

Click on the item **Fixed Asset** in the list

The screenshot shows the same form as before, but the 'Link Type' dropdown menu is now open, showing a list of items. 'Fixed Asset' is highlighted in blue, and it is also highlighted by a red rectangle.

Click on the field **Link Code**

Note that the Link Code field cannot be edited.

The screenshot shows a form with several fields: 'On Rent Doc. No.' (blank), 'Reservations Exist' (No), 'Availability Warning' (1), and 'Service Status' (dropdown). Below these is a section titled 'Link' with a 'Link Code' dropdown menu highlighted by a red rectangle.

Click on the back button

The screenshot shows the Dynamics 365 Business Central interface. On the left is a sidebar with 'CRONUS' and 'Rental Units'. In the main area, there is a 'Back' button highlighted by a red rectangle. The main area also displays 'RENTAL UNIT CARD | WORK DATE: 4/8/2019' and 'RU00001 · Buckeye Ditcher'.

Notice in the Rental Unit List, that the assigned units remained as previously configured and that the Sub-rental unit, SUB Buckeye, does not have the Link Type set.



Click on the cell **No.** with the value **RU00008**

RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
RU00006	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	Sub Buckeye Ditcher	<input type="checkbox"/>
RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>

Click on the navigation menu item popup **Manage**

365 Business Central			
IUS Rentals, Inc.			
Rentals Finance Cash Management Sales			
Units: All	Search	+ New	Manage Process Rental Attri
DESCRIPTION		GROUP ↑	GROUP NO.
1	Portable Generators	<input type="checkbox"/>	
07	165 G Brad Nailer	<input type="checkbox"/>	
5	Buckeye Ditcher	<input type="checkbox"/>	RU00001
01	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU00001
02	Buckeye Ditcher	<input type="checkbox"/>	RU00001

Click on the navigation menu item **Edit List**














365 Business Central			
IUS Rentals, Inc.			
Rentals Finance Cash Management Sales			
Units: All	Search	+ New	Manage Process Rental Attri
DESCRIPTION		Edit List	GROUP ↑
		Make changes on the page.	GROUP NO.
1	Portable Generators	<input type="checkbox"/>	
07	165 G Brad Nailer	<input type="checkbox"/>	
5	Buckeye Ditcher	<input type="checkbox"/>	RU00001
01	Buckeye Ditcher Group	<input checked="" type="checkbox"/>	RU00001
02	Buckeye Ditcher	<input type="checkbox"/>	RU00001

Click on the cell **Link Type** with the value **Item Fixed Asset Resource G/L Account**

	No	No	Fixed Asset		<input type="checkbox"/>
	No	No	Fixed Asset	FA000100	<input type="checkbox"/>
	No	No	Fixed Asset	FA000110	<input type="checkbox"/>
	No	No	Fixed Asset	FA000120	<input type="checkbox"/>
	No	No	Fixed Asset	FA000130	<input type="checkbox"/>
	No	No	Fixed Asset	RU000006	<input type="checkbox"/>
	No	No			<input type="checkbox"/>
	No	No			<input type="checkbox"/>
	No	No			<input type="checkbox"/>
	No	No			<input type="checkbox"/>
	No	No			<input type="checkbox"/>
	No	No			<input type="checkbox"/>

ODT Rentals Online Help

Click on the item **Fixed Asset** in the list

	No	No	Fixed Asset	FA000100	
	No	No	Fixed Asset	FA000110	
	No	No	Fixed Asset	FA000120	
	No	No	Fixed Asset	FA000130	
	No	No	Fixed Asset	RU00006	
	No	No			
	No	No			
	No	No			
	No	No			
	No	No			
	No	No			
	No	No			
	No	No			

Click on the back button

Dynamics 365 Business Central

CRONUS

Rental Units

- NO. ↑
- PG-001
- RU00007
- BD-006
- RU00001
- RU00002

← RENTAL UNITS | WORK DATE: 4/8/2019

🔍 Search
+ New
 Edit List
 Delete
 Edit

NO. ↑	DESCRIPTION
PG-001	Portable Generators
RU00007	165 G Brad Nailor
BD-006	Buckeye Ditcher
RU00001	Buckeye Ditcher Group
RU00002	Buckeye Ditcher
RU00003	Buckeye Ditcher

Notice that on this group, all assigned units, excluding the Sub-rental unit have had the Link Type field updated, when the group is updated.

The following unit not linked to a group has the Link Type and Link Code configured for linking to an Item.

Click on the cell **No.** with the value **PG-001**

Dynamics 365 Business Central

CRONUS Rentals, Inc. | Rentals ▾ Finance ▾ Cash Management ▾

Rental Units: All ▾ | 🔍 Search + New Manage ▾ Process ▾ Renewal ▾

NO. ↑		DESCRIPTION	GROUP ↑
PG-001	⋮	Portable Generators	<input type="checkbox"/>
RU00007		165 G Brad Nailer	<input type="checkbox"/>
BD-006		Buckeye Ditcher	<input type="checkbox"/>
RU00001	⋮	Buckeye Ditcher Group	<input checked="" type="checkbox"/>
RU00002		Buckeye Ditcher	<input type="checkbox"/>

Click on the cell **Link Type** with the value **Item**

Intelligent Cloud Insights					
options					
VICE STATUS	ON RENT	RESERVATI... EXIST	LINK TYPE	LINK CODE	IN
	No	No	Item	1000	
	No	No			
	No	No	Fixed Asset	FA000140	
	No	No	Fixed Asset		
	No	No	Fixed Asset	FA000100	

4.14.1.3. How to Process a Contract with Customer Discounts

Profile Sales Order Processor

The same steps apply when the user has the Business Manger Profile.



The following demonstrates the processing of a contract, where the Customer Card has been configured with rental discount percentages.

Click on the navigation menu item **Rental Contract**

Rental Terms Rental Units Rental Packages

ACTIONS

+ Sales Quote	+ Purchase Order	+ Rental Unit	> Se
+ Sales Order	+ Purchase Invoice	> New	> R
+ Sales Invoice	+ Rental Quote	> Payments	Ex
+ Purchase Quote	+ Rental Contract	> Reports	

Create a new rental contract for rental product and

Click on the field **Sell-to Customer Name**

Contract

Rental Actions Navigate Fewer options

Ext

Ren

Dep

Cor

Out

Click on the cell **No.** with the value **20000**

General

Bill-to Customer Name

Quote No.

Posting Date

Order Date

Current Date

NO. ↑	NAME	ZIL
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Alpine Ski House	31
50000	Relecloud	31

Rental Lines Manage Line Function + New

New Line Delete Line Expand All Collapse All Group Avail Matrix

Scroll down to the Invoice Details Tab.

Note that the Rental Line Discounts setup on the Customer card for customer 20000, have populated the discount percentage fields on the Invoice Details Tab, as shown in the attached picture.

Invoice Details Show more

Currency Code		Rental Package Disc. %	3
Bill-to Customer No.	20000	FA Rental Unit Disc. %	4
Tax Area Code	CHICAGO, IL	Item Rental Unit Disc. %	5
Location Code		Resource Rental Unit Disc. %	0
Rental Line Disc. %	0	G/L Acct Rental Unit Disc. %	0
Default Rental Disc. %	2		

The percentages can be overridden on the Invoice Details Tab, either before or after, the entry of the rental units, groups or packages on the Rental Lines.

There is an additional rental line discount field called, Rental Line Disc. %, which if populated takes priority over the other rental line discount fields.

If rental lines have been populated, the Line Discount % field on the rental lines is populated, and then a Rental Line Disc. % is entered, a popup message will occur.



When Yes is selected in the message, then all rental lines will have the Line Discount % field updated, as long as Line Discounts are allowed on the Customer and Rental Price cards.

When No is selected, then the rental lines are not updated. Only the Rental Line Disc. % field will be updated.

Click on the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' section of a software interface. It includes a 'Manage' link and buttons for 'New Line', 'Delete Line', 'Expand All', and 'Collapse All'. Below these is a table with columns: 'RENTAL UNIT NO.', 'DESCRIPTION', and 'RENTAL TERMS CODE'. The first row of the table has the 'RENTAL UNIT NO.' cell highlighted with a red rectangle.

Click on the lookup button in the cell **Rental Unit No.**

This screenshot is similar to the previous one, showing the 'Rental Lines' section. In this instance, the lookup button (three dots) in the 'RENTAL UNIT NO.' cell of the first row is highlighted with a red rectangle.

Click on the link in cell **No.** with the value **PG-001**

The screenshot displays the 'RENTAL UNIT LIST' table. It has columns for 'NO.', 'DESCRIPTION', and 'GR'. The first row shows 'PG-001' in the 'NO.' column, which is highlighted with a red rectangle. A tooltip is visible over the 'PG-001' link, showing a dropdown menu with the option 'Select record "PG-001"'. Other rows include 'RU00001' (Mini Excavator with Vibrator Plate), 'RU00007' (165 G Brad Nailer), 'BD-006' (Buckeye Ditcher), 'RU00001' (Buckeye Ditcher Group), and 'RU00002' (Buckeye Ditcher).





Click on the link in cell **No.** with the value **PG-001**

This screenshot is identical to the previous one, showing the 'RENTAL UNIT LIST' table with the 'PG-001' link highlighted in the 'NO.' column and the 'Select record "PG-001"' tooltip visible.







ODT Rentals Online Help

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options		
	New Line		Delete Line		Expand All		Collapse All
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE				
PG-001	5/7/2019	500.00	0.00				

Sales Lines		Manage	Line	Fewer options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options
 New Line	 Delete Line	 Expand All	 Collapse All		
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE		
PG-001	5/7/2019	500.00	0.00		
		0.00	0.00		
<div>Look up value</div>					

Sales Lines		Manage	Line	Fewer options
-------------	--	--------	------	---------------

Click on the link in cell **No.** with the value **RU00001**

NO. ↑	DESCRIPTION	GR
PG-001	Portable Generators	
RP00001	Mini Excavator with Vibrator Plate	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
Select record "RU00001"		Buckeye Ditcher
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

Click on the cell **Rental Quantity** with the value **0**

Manage					Line	Functions	Fewer options			
Delete Line						Expand All		Collapse All		Group Avail Matrix
DESCRIPTION		RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI					
Portable Generators		MONTH-END	2	EAST						
Buckeye Ditcher Group		MONTH-END	0							
Manage					Line	Fewer options				
UNIT OF										



Enter the text **2**.

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1
Portable Generators	MONTH-END	2	EAST	
Buckeye Ditcher Group	MONTH-END	2		

Click on the cell **Location Code**

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
Portable Generators	MONTH-END	2	EAST			4/8/2019
Buckeye Ditcher Group	MONTH-END	2				4/8/2019

Click on the link in cell **Code** with the value **EAST**

RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALT1	RENTAL TERMS CODE ALT2	RENTAL START DATE
MONTH-END	2	EAST			4/8/2019
MONTH-END	2				4/8/2019
MONTH-END	1				
MONTH-END	1				

CODE ↑

EAST

RE Select record "EAST"

WEST

+ New

NAME

East Warehouse

Inventory Items Rental Res

West Warehouse

Click on the cell **Line Discount %** with the value **4**

Notice that the Line Discount % field is automatically populated with the 4% from the Invoicing Details tab, as this group has the Link Type set to Fixed Asset. Also note that the child unit lines as well have the 4% populated as well, as the Line Discount % data will default from the group to the child unit lines.

QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	PARTIAL RETURN DATE
0	0	0	5	☑	
0	0	0	4	☑	
0	0	0	4	☑	
0	0	0	4	☑	



ODT Rentals Online Help

Click on the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE				
PG-001	5/7/2019	500.00	0.00				
RU00001	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines				Manage	Line	Functions	Fewer options
RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE				
PG-001	5/7/2019	500.00	0.00				
RU00001	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				

Click on the link in cell **No.** with the value **RU00002**

Search Rental Open in Excel				Navigate	Fewer options
RENTAL UNIT LIST					
NO. ↑	DESCRIPTION	GI			
BD-006	Buckeye Ditcher				
RU00002	Buckeye Ditcher				
RU00003	Buckeye Ditcher				
RU00005	Buckeye Ditcher				
SUB BUCKEYE	Sub Buckeye Ditcher				

Click on the cell **Rental Unit No.**

RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALTI RENTAL UNIT PRICE				
PG-001	5/7/2019	500.00	0.00				
RU00001	5/7/2019	5,000.00	0.00				
RU00002	5/7/2019	5,000.00	0.00				
	5/7/2019	5,000.00	0.00				



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

New LineDelete LineExpand AllCollapse All

RENTAL UNIT NO.	RENTAL RETURN DATE	RENTAL UNIT PRICE	ALT1 RENTAL UNIT PRICE
PG-001	5/7/2019	500.00	0.00
RU00001	5/7/2019	5,000.00	0.00
RU00002	5/7/2019	5,000.00	0.00
<input type="text" value="..."/>	5/7/2019	5,000.00	0.00

Look up value

Sales LinesManageLineFewer options

Click on the link in cell **No.** with the value **RU00003**

RENTAL UNIT LIST

NO. ↑	DESCRIPTION	GR
BD-006	Buckeye Ditcher	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
SUB BUCKEYE	Sub Buckeye Ditcher	

Click on the field **Item Rental Unit Disc. %**

Show more

	<input type="text" value="3"/>
	<input type="text" value="4"/>
	<input type="text" value="5"/>
c. %	<input type="text" value="0"/>
d. %	<input type="text" value="0"/>

Enter the text **10**. Press the **Enter** key.

Show more

	<input type="text" value="3"/>
	<input type="text" value="4"/>
	<input type="text" value="5"/>
c. %	<input type="text" value="0"/>
d. %	<input type="text" value="0"/>



ODT Rentals Online Help

Click on the button **Yes**

?

You have modified the Item Rental Unit Disc. %. Do you want to update the lines discount percent? If Yes, then the update will overwrite discount percentage for all applicable rental lines, based on the rental unit link type and the pricing setting for allow discount.

Yes

No

Click on the cell **Line Discount %** with the value **10**

Note that the rental line for the unit linked to an item automatically has the Line Discount % field updated.

QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	PARTIAL RETURN DATE
0	0	0	10	<input checked="" type="checkbox"/>	
0	0	0	4	<input checked="" type="checkbox"/>	
0	0	0	4	<input checked="" type="checkbox"/>	
0	0	0	4	<input checked="" type="checkbox"/>	
				<input type="checkbox"/>	

Click on the field **Rental Line Disc. %**

20000

CHICAGO, IL

0

2

Enter the text **7**. Press the **Enter** key.

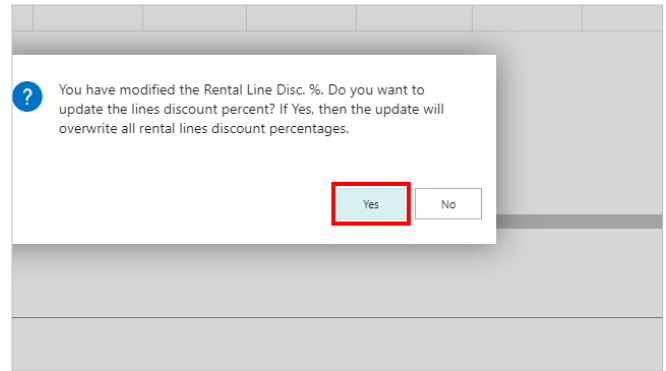
20000

CHICAGO, IL

7

2

Click on the button **Yes**



? You have modified the Rental Line Disc. %. Do you want to update the lines discount percent? If Yes, then the update will overwrite all rental lines discount percentages.

Yes No

Click on the cell **Line Discount %** with the value **7**

Notice that all rental lines have the Line Discount % field updated to the 7% entered on the Invoicing Details tab, even though the Item Rental Disc. % and FA Rental Disc. % fields are populated.

This is due to the Rental Line Disc. % field having priority over the other discount fields on the Invoicing Details tab.

QTY. ON RENT	QTY. TO RETURN	QTY. RETURNED	LINE DISCOUNT %	RE... DAY BIL...	PARTIAL RETURN DATE
0	0	0	7	<input checked="" type="checkbox"/>	
0	0	0	7	<input checked="" type="checkbox"/>	
0	0	0	7	<input checked="" type="checkbox"/>	
0	0	0	7	<input checked="" type="checkbox"/>	
				<input type="checkbox"/>	

The following demonstrates the review of the line discount % and related Rental Amount Line fields.

Click on the cell **Rental Unit No.** with the value **PG-001**

Document Date 4/8/2019

Rental Lines	Manage	Line	Functions	Fewer options
RENTAL UNIT NO.		DESCRIPTION		RENTAL TERMS CODE
PG-001		Portable Generators		MONTH-EN
RU00001		Buckeye Ditcher Group		MONTH-EN
RU00002		Buckeye Ditcher		MONTH-EN
RU00003		Buckeye Ditcher		MONTH-EN

Click on the cell **Rental Unit Price** with the value **500.00**

The Rental Unit Price on the Rental Lines is not revised when a Line Discount % exists. The Rental Amount lines which are used in the invoicing calculation is where the impact of discount % is seen.

Outstanding Amount

nsions	T	CODE ALT2	DATE	DATE	PRICE	UNIT PRICE	UNIT PRICE
			4/8/2019	5/7/2019	500.00	0.00	0.00
			4/8/2019	5/7/2019	5,000.00	0.00	0.00
			4/8/2019	5/7/2019	5,000.00	0.00	0.00
			4/8/2019	5/7/2019	5,000.00	0.00	0.00



ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/8/2019

Order Date 4/8/2019

Document Date 4/8/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

UNIT NO.	DESCRIPTION	CODE	QUA
PG-001	Portable Generators	MONTH-END	
RU00001	Buckeye Ditcher Group	MONTH-END	
RU00002	Buckeye Ditcher	MONTH-END	

Click on the navigation menu item **Rental Amount Lines**

Posting Date 4/8/2019

Order Date 4/8/2019

Document Date 4/8/2019

Rental Lines | Manage | **Line** | Functions | Fewer options

Rental Amount Lines | Rental Ledger Entries | Rental Value Entries

UNIT NO. View the rental amount line records that will be billed for the

PG-001	Portable Generators	MONTH-EN
RU00001	Buckeye Ditcher Group	MONTH-EN
RU00002	Buckeye Ditcher	MONTH-EN
RU00003	Buckeye Ditcher	MONTH-EN

Click on the cell **Unit Price Excl. Tax** with the value **500.00**

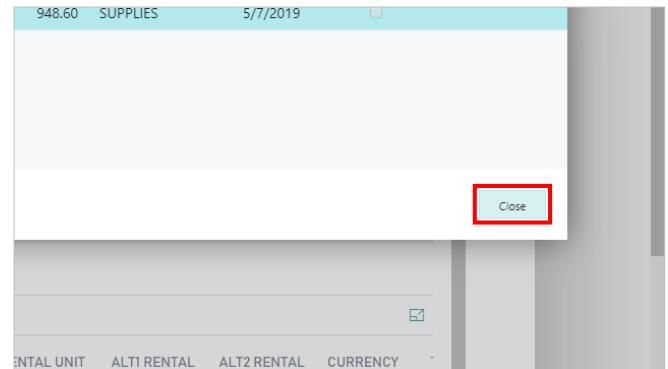
Note that the Unit Price Excl. Tax is the same as the Rental Unit Price on the rental line.

ENDING DATE-TIME	EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	CU
5/7/2019 11:59 PM	2	500.00	930.00	

Click on the cell **Line Amount Excl. Tax** with the value **930.00**

EXTENDED QUANTITY	UNIT PRICE EXCL. TAX	LINE AMOUNT EXCL. TAX	CURRENCY CODE
2	500.00	930.00	

Click on the button **Close**



NOTE

The Line Discount % field on the rental lines can be overridden, even when the Invoice Details tab has default percentages entered, which defaulted to the applicable rental lines.

4.15.Additional Notes for Rentals

4.15.1. Additional Notes Overview

4.15.1.1. Overview

Many organizations use Standard Text Codes with or without extended text to add notes to a Sales Quote, Sales Order or Sales Invoice lines in order to print on the related documents.

The Rentals uses the Standard Text feature to create Additional Notes. In addition, the rental Additional Notes provides for adding Description notes in the Additional Notes.

Additional Notes provided the ability to specify which document(s) the note(s) are to print on.

NOTE:

When printing documents from the Rental Quote or Contract and the Show Rental Details option is not enabled, then for packages the Additional Notes attached to the component rental units will not print.

Additional Notes can either be attached to a Rental Unit, which will default to the Rental Quote or Rental Contract, or be added directly on the Rental Quote or Rental Contract for a selected line.

Should any of the defaulted notes not be required for a specific quote or contract, they can be deleted directly on the quote or contract. This will not delete the notes from the unit group or unit it was setup on.

When Additional Notes are added to a Rental Unit Group, the note will apply to all units assigned to the group.

When Additional Notes are added to a Rental Unit Group, the note will apply to all units assigned to the group. When a Rental Unit, which is assigned to a group, has another Additional Note, then both the group note and the unit's note will default to the Additional Notes page on the quote and contract. This occurs whether a group is entered or the unit is entered without the group being entered.

On Rental Quotes where a Rental Unit Group is used, the quote document only prints the group. Therefore, any notes related to specific child units, if entered on the lines, will not be printed. Only the Additional Notes related to the group will print. Should a unit assigned to a group be entered directly on the lines without a group being entered, then both the defaulted group note and if any, defaulted or entered notes on the unit line will print.

For Rental Contract entry, or when a quote is converted to a contract, then the Additional Notes will not be populated on the unit group record. On a contract when a group is used, then the Additional Notes will populate the child lines for the group. Should there be more notes setup on the child units, then these will automatically populate the Additional Note on the quote or contract, in addition to the group notes. As with quotes, should a unit assigned to a group be directly entered on the lines without a group being entered, then both the defaulted group note, and if any, defaulted or entered notes on the unit line will printed.

4.15.2. How to Set Up Additional Notes

4.15.2.1. Overview

The setup of Additional notes includes:

- Standard Text Codes with, or without, extended text that will be used with rentals
- Adding Additional Notes to Rental Units, including both Standard Text and description line notes and specifying what documents they are to print on

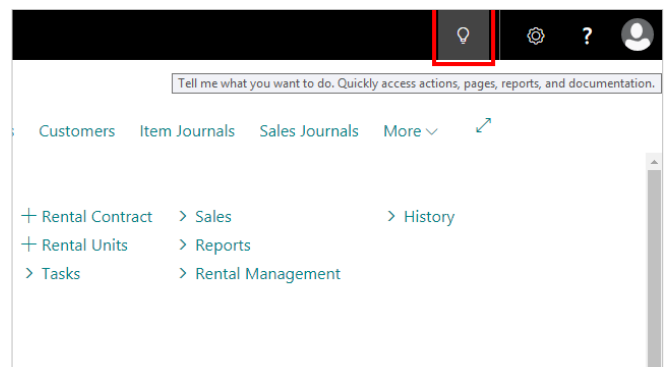
4.15.2.2. How to Set Up a Standard Text Code for Rentals

Profile - Business Manager

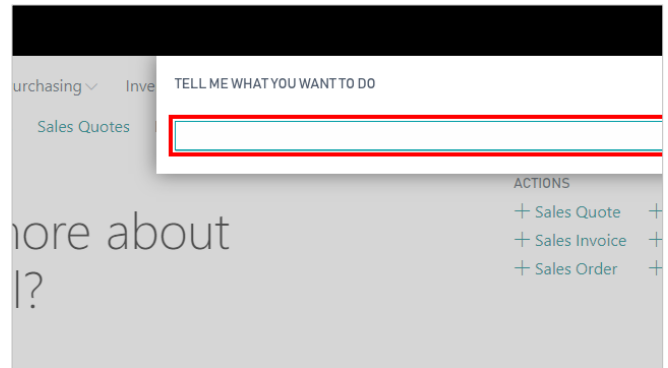
The ability to setup of Standard Text Codes is controlled by the standard Dynamics 365 Business Central Permission Sets assigned to the users.

The following example demonstrates the setting up of a new Standard Text Code with Extended Text.

Click on the link **Search**



Click on the field **Type** to start search:



SEARCH

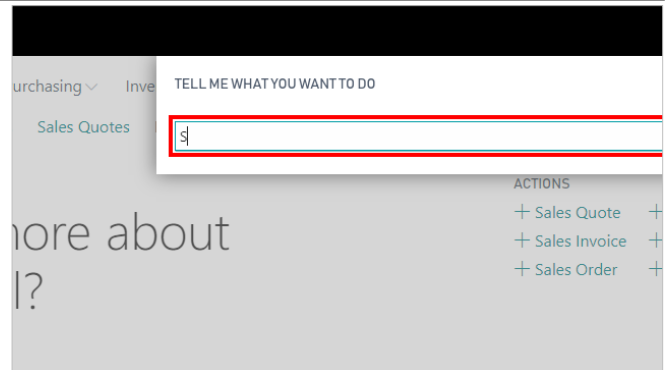
TELL ME WHAT YOU WANT TO DO

SALES QUOTES

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order

Enter the text **Standard Text**.



SEARCH

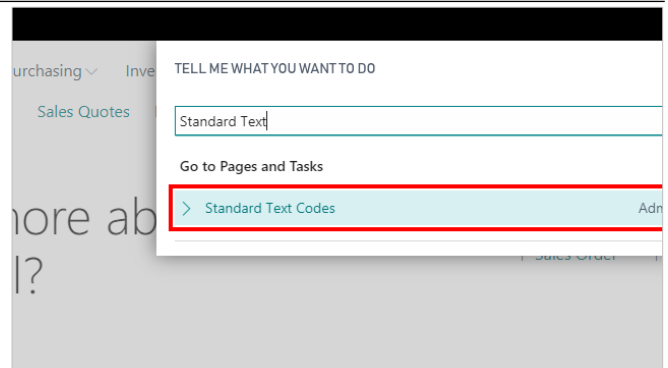
TELL ME WHAT YOU WANT TO DO

SALES QUOTES

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order

Click on **Standard Text Codes Administration**



SEARCH

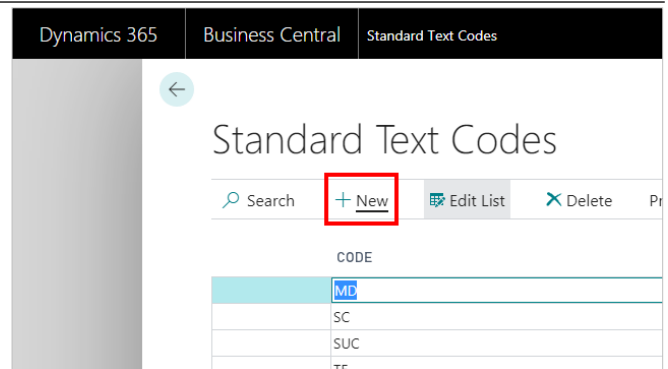
TELL ME WHAT YOU WANT TO DO

SALES QUOTES

ACTIONS

- + Sales Quote
- + Sales Invoice
- + Sales Order

Click on the navigation menu item **New**



Dynamics 365 Business Central Standard Text Codes

Standard Text Codes

Search + New Edit List Delete

CODE
MD
SC
SUC
TF



Click on the cell **Code**

Standard Text Codes

Search + New Edit List Delete Process Open in Excel

CODE
*
MD
SC
SUC
TE

Enter the text **Rental Returns**.

Standard Text Codes

Search + New Edit List Delete Process Open in Excel

CODE
* R
MD
SC
SUC
TE

Click on the cell **Description**

Open in Excel

DESCRIPTION
Monthly Depreciation
Shipping Charge
Sale under Contract
Travel Expenses

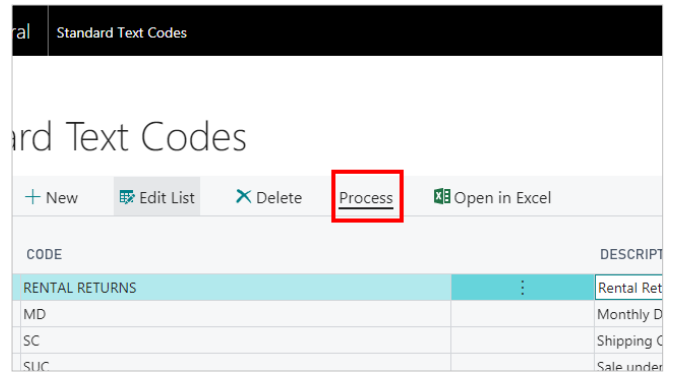
Enter the text **Rental Returns**.

Open in Excel

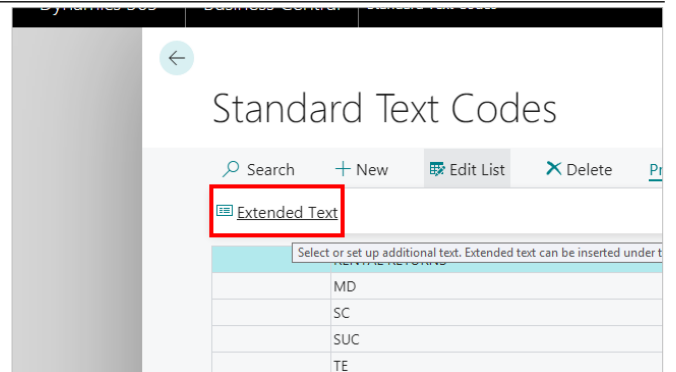
DESCRIPTION
R
Monthly Depreciation
Shipping Charge
Sale under Contract
Travel Expenses

The following example demonstrates the setup of Extended Text on a Standard Text Code.

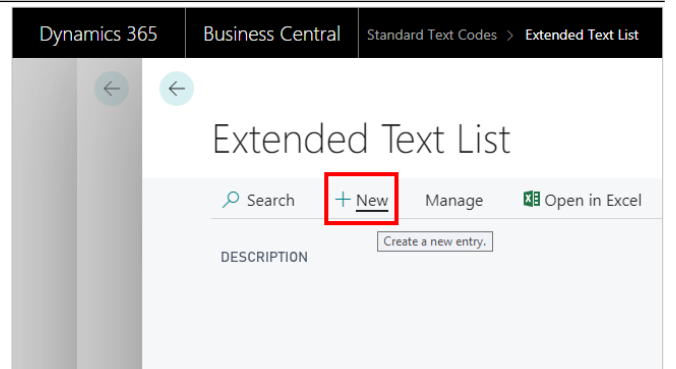
Click on the navigation menu item popup **Process**



Click on the navigation menu item **Extended Text**

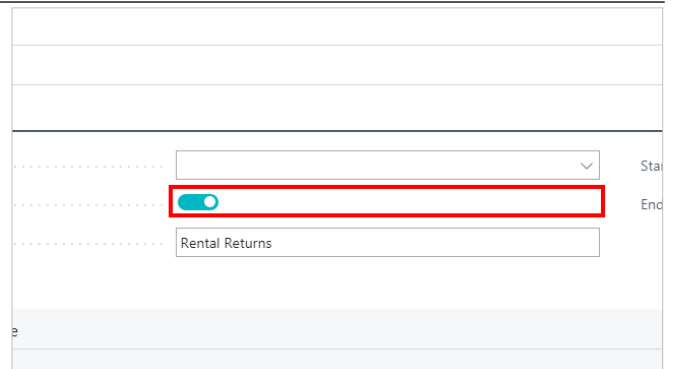


Click on the navigation menu item **New**



Click on **All Language Codes, Yes**

The default when the extended text page opens is that the All Languages field is checked. Should the note only apply to a specific language, then a language can be selected in the Language field using the look-up button in the field.





ODT Rentals Online Help

Click on the field **Description**

The screenshot shows a web form with several fields. The 'Description' field is highlighted with a red rectangular box. Above it are fields for 'Starting Date' and 'Ending Date', each with a dropdown menu and a toggle switch. Below the 'Description' field is a 'TEXT' label.

Enter the text **Rental Returns**.

The screenshot shows the same web form as before, but the 'Description' field is now populated with the text 'Rental Returns' and is highlighted with a red rectangular box. The 'Starting Date' and 'Ending Date' fields are still empty.

Should the note be applicable to a specific date range then the Starting Date and Ending Date fields are to be populated.

Click on the field **Starting Date**

The screenshot shows the web form with the 'Starting Date' field highlighted by a red rectangular box. The 'Description' field is still populated with 'Rental Returns'. The 'Ending Date' field is empty.

Click on the field **Ending Date**

The screenshot shows the web form with the 'Ending Date' field highlighted by a red rectangular box. Both the 'Starting Date' and 'Ending Date' fields now contain dates, indicating a date range has been specified.

The following demonstrate the entry of the extended text lines.



ODT Rentals Online Help

Click on the cell **Text**

Description		Rental Returns
Lines	Manage	
	TEXT	

Enter the text **Rental equipment must be cleaned prior to return.**

Description		Rental Returns
Lines	Manage	
	TEXT	

Click on the cell **Text**

Description		Rental Returns
Lines	Manage	
	TEXT	
	Rental equipment must be cleaned prior to return	

Enter the text **Equipment using diesel or gas are to be filled up.**

Description		Rental Returns
Lines	Manage	
	TEXT	
	Rental equipment must be cleaned prior to return	



Click on the cell **Text**

Lines	Manage
TEXT	
	Rental equipment must be cleaned prior to return
	Equipment using diesel or gas are to be filled up

Enter the text **If fuel is not topped up an additional charge.**

Lines	Manage
TEXT	
	Rental equipment must be cleaned prior to return
	Equipment using diesel or gas are to be filled up

Click on the cell **Text**

Lines	Manage
TEXT	
	Rental equipment must be cleaned prior to return
	Equipment using diesel or gas are to be filled up
	If fuel is not topped up an additional charge

Enter the text **will be levied to cover topping up the fuel.**

Lines	Manage
TEXT	
	Rental equipment must be cleaned prior to return
	Equipment using diesel or gas are to be filled up
	If fuel is not topped up an additional charge

As this Standard Text Code and Extended Text are only to print on rental documents, the Sales and Purchase printing options are to be set to No using the following steps.

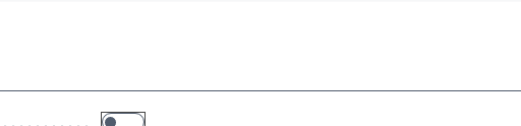
As the options are set to Yes by default, then to set them to No, click on the fields.



Click on **Sales Invoice, Yes**

The screenshot shows the 'General' settings page for 'My Project'. The 'Show Desktop Icons' toggle is highlighted with a red rectangle. The toggle is currently turned on, indicated by a blue circle on the left. The text 'Show Desktop Icons' is visible to the right of the toggle.

Click on **Sales Credit Memo, Yes**



Click on **Reminder, Yes**

Category	Item	Status
Category 1	Item 1	<input checked="" type="checkbox"/>
Category 1	Item 2	<input checked="" type="checkbox"/>
Category 1	Item 3	<input checked="" type="checkbox"/>
Category 1	Item 4	<input checked="" type="checkbox"/>
Category 1	Item 5	<input checked="" type="checkbox"/>
Category 1	Item 6	<input checked="" type="checkbox"/>
Category 1	Item 7	<input checked="" type="checkbox"/>
Category 1	Item 8	<input checked="" type="checkbox"/>
Category 1	Item 9	<input checked="" type="checkbox"/>
Category 1	Item 10	<input checked="" type="checkbox"/>
Category 1	Item 11	<input checked="" type="checkbox"/>
Category 1	Item 12	<input checked="" type="checkbox"/>
Category 1	Item 13	<input checked="" type="checkbox"/>
Category 1	Item 14	<input checked="" type="checkbox"/>
Category 1	Item 15	<input checked="" type="checkbox"/>
Category 1	Item 16	<input checked="" type="checkbox"/>
Category 1	Item 17	<input checked="" type="checkbox"/>
Category 1	Item 18	<input checked="" type="checkbox"/>
Category 1	Item 19	<input checked="" type="checkbox"/>
Category 1	Item 20	<input checked="" type="checkbox"/>
Category 1	Item 21	<input checked="" type="checkbox"/>
Category 1	Item 22	<input checked="" type="checkbox"/>
Category 1	Item 23	<input checked="" type="checkbox"/>
Category 1	Item 24	<input checked="" type="checkbox"/>
Category 1	Item 25	<input checked="" type="checkbox"/>
Category 1	Item 26	<input checked="" type="checkbox"/>
Category 1	Item 27	<input checked="" type="checkbox"/>
Category 1	Item 28	<input checked="" type="checkbox"/>
Category 1	Item 29	<input checked="" type="checkbox"/>
Category 1	Item 30	<input checked="" type="checkbox"/>
Category 1	Item 31	<input checked="" type="checkbox"/>
Category 1	Item 32	<input checked="" type="checkbox"/>
Category 1	Item 33	<input checked="" type="checkbox"/>
Category 1	Item 34	<input checked="" type="checkbox"/>
Category 1	Item 35	<input checked="" type="checkbox"/>
Category 1	Item 36	<input checked="" type="checkbox"/>
Category 1	Item 37	<input checked="" type="checkbox"/>
Category 1	Item 38	<input checked="" type="checkbox"/>
Category 1	Item 39	<input checked="" type="checkbox"/>
Category 1	Item 40	<input checked="" type="checkbox"/>
Category 1	Item 41	<input checked="" type="checkbox"/>
Category 1	Item 42	<input checked="" type="checkbox"/>
Category 1	Item 43	<input checked="" type="checkbox"/>
Category 1	Item 44	<input checked="" type="checkbox"/>
Category 1	Item 45	<input checked="" type="checkbox"/>
Category 1	Item 46	<input checked="" type="checkbox"/>
Category 1	Item 47	<input checked="" type="checkbox"/>
Category 1	Item 48	<input checked="" type="checkbox"/>
Category 1	Item 49	<input checked="" type="checkbox"/>
Category 1	Item 50	<input checked="" type="checkbox"/>
Category 1	Item 51	<input checked="" type="checkbox"/>
Category 1	Item 52	<input checked="" type="checkbox"/>
Category 1	Item 53	<input checked="" type="checkbox"/>
Category 1	Item 54	<input checked="" type="checkbox"/>
Category 1	Item 55	<input checked="" type="checkbox"/>
Category 1	Item 56	<input checked="" type="checkbox"/>
Category 1	Item 57	<input checked="" type="checkbox"/>
Category 1	Item 58	<input checked="" type="checkbox"/>
Category 1	Item 59	<input checked="" type="checkbox"/>
Category 1	Item 60	<input checked="" type="checkbox"/>
Category 1	Item 61	<input checked="" type="checkbox"/>
Category 1	Item 62	<input checked="" type="checkbox"/>
Category 1	Item 63	<input checked="" type="checkbox"/>
Category 1	Item 64	<input checked="" type="checkbox"/>
Category 1	Item 65	<input checked="" type="checkbox"/>
Category 1	Item 66	<input checked="" type="checkbox"/>
Category 1	Item 67	<input checked="" type="checkbox"/>
Category 1	Item 68	<input checked="" type="checkbox"/>
Category 1	Item 69	<input checked="" type="checkbox"/>
Category 1	Item 70	<input checked="" type="checkbox"/>
Category 1	Item 71	<input checked="" type="checkbox"/>
Category 1	Item 72	<input checked="" type="checkbox"/>
Category 1	Item 73	<input checked="" type="checkbox"/>
Category 1	Item 74	<input checked="" type="checkbox"/>
Category 1	Item 75	<input checked="" type="checkbox"/>
Category 1	Item 76	<input checked="" type="checkbox"/>
Category 1	Item 77	<input checked="" type="checkbox"/>
Category 1	Item 78	<input checked="" type="checkbox"/>
Category 1	Item 79	<input checked="" type="checkbox"/>
Category 1	Item 80	<input checked="" type="checkbox"/>
Category 1	Item 81	<input checked="" type="checkbox"/>
Category 1	Item 82	<input checked="" type="checkbox"/>
Category 1	Item 83	<input checked="" type="checkbox"/>
Category 1	Item 84	<input checked="" type="checkbox"/>
Category 1	Item 85	<input checked="" type="checkbox"/>
Category 1	Item 86	<input checked="" type="checkbox"/>
Category 1	Item 87	<input checked="" type="checkbox"/>
Category 1	Item 88	<input checked="" type="checkbox"/>
Category 1	Item 89	<input checked="" type="checkbox"/>
Category 1	Item 90	<input checked="" type="checkbox"/>
Category 1	Item 91	<input checked="" type="checkbox"/>
Category 1	Item 92	<input checked="" type="checkbox"/>
Category 1	Item 93	<input checked="" type="checkbox"/>
Category 1	Item 94	<input checked="" type="checkbox"/>
Category 1	Item 95	<input checked="" type="checkbox"/>
Category 1	Item 96	<input checked="" type="checkbox"/>
Category 1	Item 97	<input checked="" type="checkbox"/>
Category 1	Item 98	<input checked="" type="checkbox"/>
Category 1	Item 99	<input checked="" type="checkbox"/>
Category 1	Item 100	<input checked="" type="checkbox"/>
Category 1	Item 101	<input checked="" type="checkbox"/>
Category 1	Item 102	<input checked="" type="checkbox"/>
Category 1	Item 103	<input checked="" type="checkbox"/>
Category 1	Item 104	<input checked="" type="checkbox"/>
Category 1	Item 105	<input checked="" type="checkbox"/>
Category 1	Item 106	<input checked="" type="checkbox"/>
Category 1	Item 107	<input checked="" type="checkbox"/>
Category 1	Item 108	<input checked="" type="checkbox"/>
Category 1	Item 109	<input checked="" type="checkbox"/>
Category 1	Item 110	<input checked="" type="checkbox"/>
Category 1	Item 111	<input checked="" type="checkbox"/>
Category 1	Item 112	<input checked="" type="checkbox"/>
Category 1	Item 113	<input checked="" type="checkbox"/>
Category 1	Item 114	<input checked="" type="checkbox"/>
Category 1	Item 115	<input checked="" type="checkbox"/>
Category 1	Item 116	<input checked="" type="checkbox"/>
Category 1	Item 117	<input checked="" type="checkbox"/>
Category 1	Item 118	<input checked="" type="checkbox"/>
Category 1	Item 119	<input checked="" type="checkbox"/>
Category 1	Item 120	<input checked="" type="checkbox"/>
Category 1	Item 121	<input checked="" type="checkbox"/>
Category 1	Item 122	<input checked="" type="checkbox"/>
Category 1	Item 123	<input checked="" type="checkbox"/>
Category 1	Item 124	<input checked="" type="checkbox"/>
Category 1	Item 125	<input checked="" type="checkbox"/>
Category 1	Item 126	

Click on **Finance Charge Memo, Yes**

Show more



ODT Rentals Online Help

Click on **Purchase Quote, Yes**

<input type="checkbox"/>	Ren
<input type="checkbox"/>	Fin
<input checked="" type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pre
<input checked="" type="checkbox"/>	Pre

Click on **Purchase Blanket Order, Yes**

<input type="checkbox"/>	Ren
<input type="checkbox"/>	Fin
<input type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pre
<input checked="" type="checkbox"/>	Pre

Click on **Purchase Order, Yes**


<input type="checkbox"/>	Ren
<input type="checkbox"/>	Fin
<input type="checkbox"/>	Pur
<input type="checkbox"/>	Pur
<input checked="" type="checkbox"/>	Pre
<input checked="" type="checkbox"/>	Pre

Click on **Purchase Invoice, Yes**

<input type="checkbox"/>	Ren
<input type="checkbox"/>	Fin
<input type="checkbox"/>	Pur
<input type="checkbox"/>	Pur
<input type="checkbox"/>	Pre
<input checked="" type="checkbox"/>	Pre



Click on **Purchase Return Order, Yes**



Click on **Purchase Credit Memo, Yes**



Click on **Prepmt. Purchase Invoice, Yes**



Click on **Prepmt. Purchase Credit Memo, Yes**

..... ☐

..... ☐

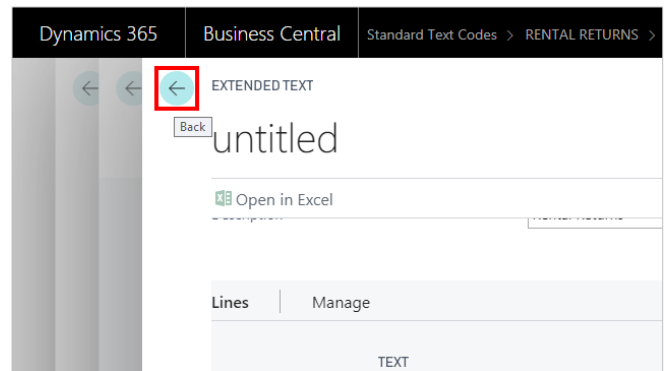
..... ☐

..... ☐

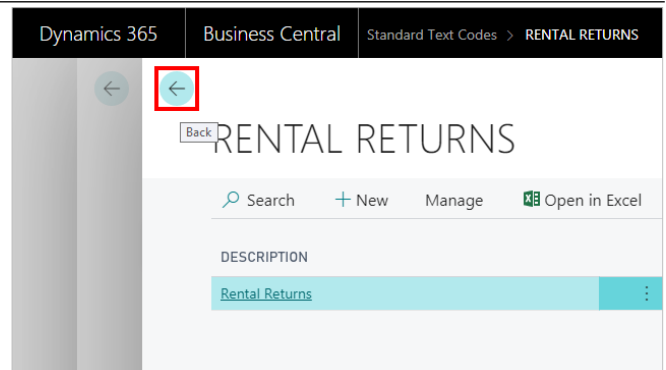
..... ☐

Memo ☒

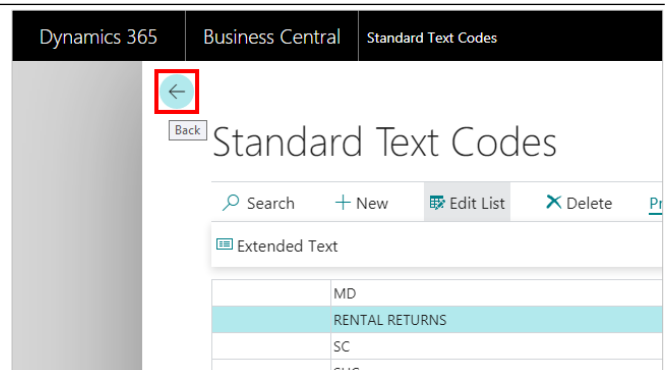
Click on the back button



Click on the back button



Click on the back button

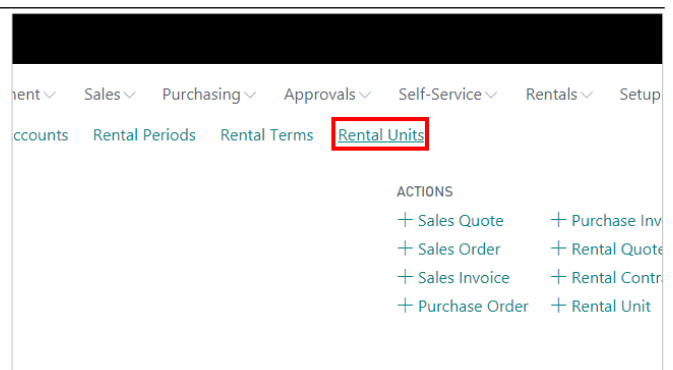


4.15.2.3. How to Set Up Additional Notes on Rental Units

Profile - Business Manager

The access to setup of the Additional Notes includes the required permissions to "Read" Standard Text Codes, and the ODT Rentals Permission Set.

Click on the navigation menu item **Rental Units**





ODT Rentals Online Help

Click on the link in cell **No.** with the value **RU00001**

Rental Units: All				Search	New	Manage	Process	Rental
NO.		DESCRIPTION	GROUP					
PG-001		Portable Generators						
RU00013		16 G Brad Nailers						
BD-006		Buckeye Ditcher						
RU00001		Buckeye Ditcher Group						
RU00002		Buckeye Ditcher						
RU00003		Buckeye Ditcher						
RU00004		Buckeye Ditcher						
RU00005		Buckeye Ditcher						

Click on the navigation menu item popup **Rental**

Dynamics 365Business Central

Rental Units > RU00001 · Buckeye Ditcher Group

CRONUS

← RENTAL UNIT CARD

Rental Units

NO.

PG-001

RU00013

BD-006

RU00001

RU00002

RU00001 · Buckeye Ditcher

ProcessRentalPageActionsNavigate

Copy Rental Unit...

General

No. RU00001

Click on the navigation menu item **Additional Notes**

Business Central

Rental Units > RU00001 · Buckeye Ditcher Group

← RENTAL UNIT CARD

RU00001 · Buckeye Ditcher Group

ProcessRentalPageActionsNavigateLess options

Rental PricesAttributesAdditional NotesRental Ledger Entry

Set up additional notes.

General

No. RU00001

Description Buckeye Ditcher Group

Click on the navigation menu item **New**

Dynamics 365Business Central

Rental Units > RU00001 · Buckeye Ditcher Group

CRONUS

←

ODT Additional Notes

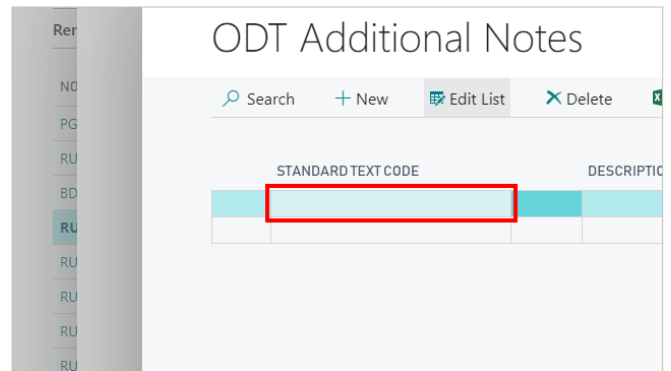
SearchNewEdit ListDelete

Create a new entry.

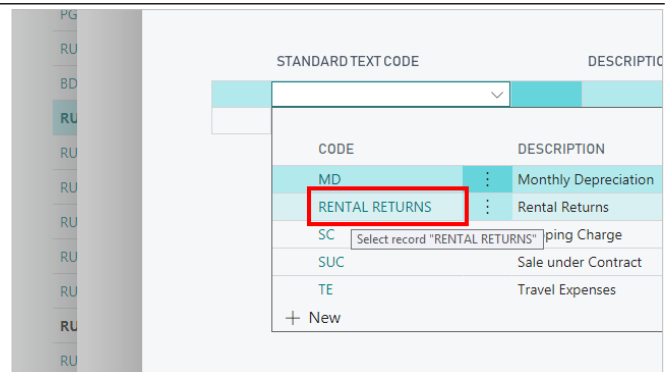
STANDARD TEXT CODE

DESCRIPTION

Click on the cell **Standard Text Code**



Click on **Code = RENTAL RETURNS**, **Description = Rental Returns**

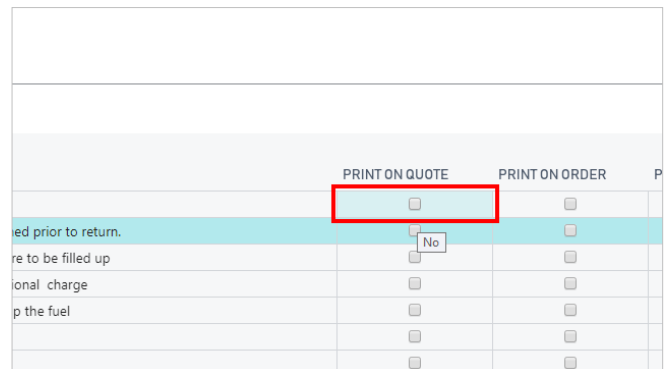


After moving off the Standard Text line the extended lines will automatically be displayed.

The following steps demonstrate the selection of the documents that the note is to print on.

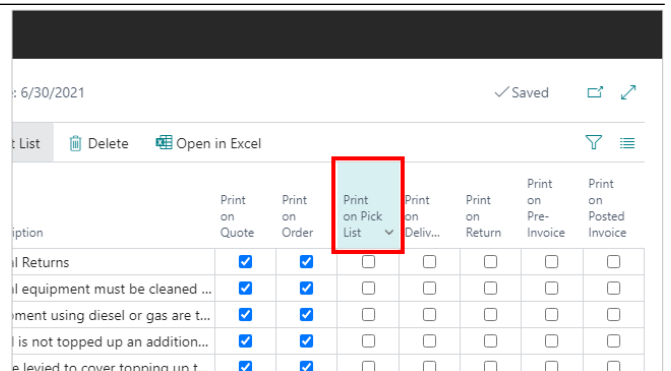
When the standard text code line is checked on a document to print on, then the extended text lines are automatically checked as well. These can be overridden, if desired.

Click on **Print on Quote**



Click on the column header **Print on Pick List**

If the additional note is to print on the Pick List for the staff that select the rental unit(s) for the contract, then check the boolean box as well.





ODT Rentals Online Help

Click on **Print on Quote**

	PRINT ON QUOTE	PRINT ON ORDER	PRINT ON DELIVERY
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
nt must be cleaned prior to return	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
g diesel or gas are to be filled up	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
yped up an additional charge	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
cover topping up the fuel	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
our business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on **Print on Order**

Description	Print on Quote	Print on Order	Print on Pick List	Print on Deliv...	Print on Return	on Pre-Invoice	on Po Inv
Rental Returns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Rental equipment must be cleaned ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Equipment using diesel or gas are t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
If fuel is not topped up an addition...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
will be levied to cover topping up t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Thank you for your business	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Click on **Print on Posted Invoice**

IN RY	PRINT ON RETURN	PRINT ON PRE- INVOICE	PRINT ON POSTED INVOICE
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DITCHER
DITCHER G...
DITCHER
DITCHER
DITCHER
DITCHER
DITCHER
GASOLINE ...
GASOLINE ...
GASOLINE ...

Click on the back button

Dynamics 365 | Business Central | Rental Units > RU00001 - Buckeye Ditcher Gro

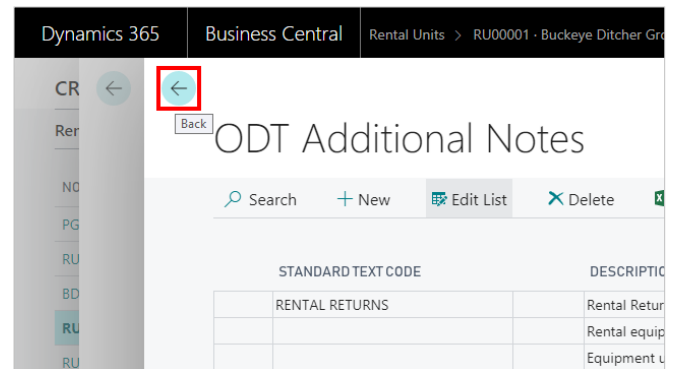
CR < <

Back ODT Additional Notes

Search + New Edit List Delete

STANDARD TEXT CODE	DESCRIPTION
RENTAL RETURNS	Rental Return
	Rental equip
	Equipment u

Click on the back button



4.15.3. How to Add an Additional Note to a Rental Line

4.15.3.1. Overview

Additional Notes can be added to a unit entered on a quote or contract.

4.15.3.2. How to Add an Additional Note to a Rental Contract Rental Line

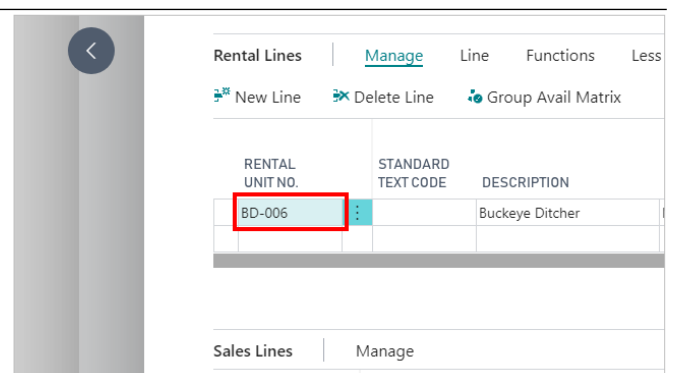
Profile - Business Manager

The adding of Additional Notes to a unit entered on a quote or contract can as well be completed by a Sales Order Processor, when the user has the appropriate "Read" permissions to Standard Text Codes.

The following example demonstrates adding an Additional Note to a unit entered on a Rental Contract Line.

The same steps apply to adding Additional Notes to a unit on a Rental Quote line.

Click on the cell **Rental Unit No.**





ODT Rentals Online Help

Click on the navigation menu item popup **Line**

Quote NO.

Posting Date 4/18/2018

Order Date 4/18/2018

Document Date 4/18/2018

Rental Lines | Manage | **Line** | Functions | Less options

New Line Delete Line Group Avail Matrix

RENTAL UNIT NO.	STANDARD TEXT CODE	DESCRIPTION	RENTAL TERMS CODE
BD-006		Buckeye Ditcher	MONTH-PEND

Click on the navigation menu item **Additional Notes**

4/18/2018 Contract Total

4/18/2018 Outstanding Amount

Functions | Less options

Ledger Entries Rental Value Entries **Additional Notes**

View, add or modify Additional Notes for the select

DESCRIPTION	RENTAL TERMS CODE	RENTAL QUANTITY	LOCATION CODE	RENTAL TERMS CODE ALTI	RENTAL TERMS CODE AL
Buckeye Ditcher	MONTH-PEND	1	EAST		

Click on the navigation menu item **New**

Dynamics 365 | Business Central | Rental Contracts - Open > Rental Contract - R

ODT Rental Additional Not

Search **+ New** Edit List Delete

Create a new entry.

STANDARD TEXT CODE	DESCRIPTION
--------------------	-------------

Click on the cell **Standard Text Code**

ODT Rental Additional Not

Search + New Edit List Delete

STANDARD TEXT CODE	DESCRIPTION



Click on **Code = RENTAL RETURNS**, Description = **Rental Returns**


Click on **Print on Quote**





Click on **Print on Order**

Click on the column header **Print on Pick List**

If the Standard Text, or a descriptive comment is to print on the Pick List for the staff selecting the rental unit(s), then check the boolean box.


Click on **Print on Delivery**




1/18/2018 ✓ Saved 

 Delete  Open in Excel  

	Print on Quote	Print on Order	Print on Pick List ↑	Print on Deliv...	Print on Return	Print on Pre-Invoice	Print on Posted Invoice
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ent must be cleaned ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g diesel or gas are t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
pped up an addition...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o cover topping up t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>


Click on **Print on Return**



✓ Saved 

 Open in Excel  

	Print on Quote	Print on Order	Print on Pick List ↑	Print on Deliv...	Print on Return	Print on Pre-Invoice	Print on Posted Invoice
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e cleaned ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
r gas are t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n addition...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
oping up t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on **Print on Posted Invoice**




✓ Saved 





	Print on Order	Print on Pick List ↑	Print on Deliv...	Print on Return	Print on Pre-Invoice	Print on Posted Invoice
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Click on the back button

Dynamics 365 Business Central Rental Contracts - Open > Rental Contract · R

Back ODT Rental Additional Not

 Search  New  Edit List  Delete

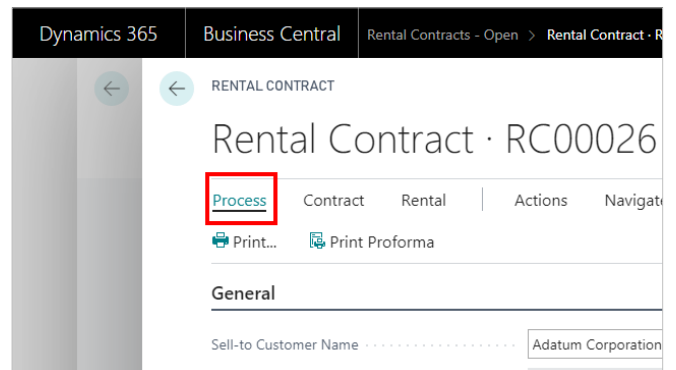
STANDARD TEXT CODE	DESCRIPTION
RENTAL RETURNS	Rental Return
	Rental equip
	Equipment u

When some of the extended text lines are not to be included they can be deleted.

4.15.3.3. Example of Previewing the Rental Contract with an

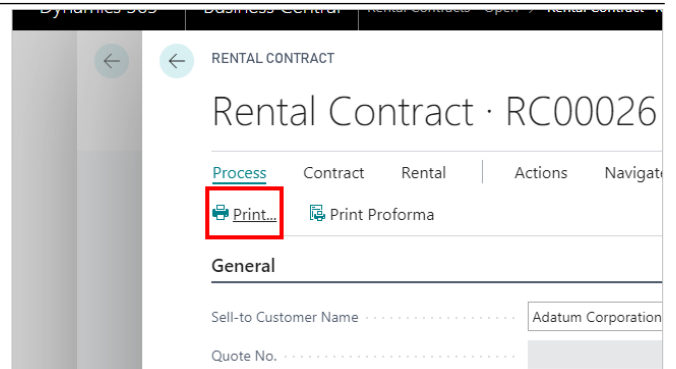
Additional Note

Click on the navigation menu item popup **Process**



The screenshot shows the 'Rental Contract' form for 'RC00026'. The navigation menu at the top includes 'Dynamics 365', 'Business Central', and 'Rental Contracts - Open > Rental Contract · R'. The form has tabs for 'Process', 'Contract', 'Rental', 'Actions', and 'Navigation'. The 'Process' tab is selected and highlighted with a red box. Below the tabs, there are buttons for 'Print...' and 'Print Proforma'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation'.

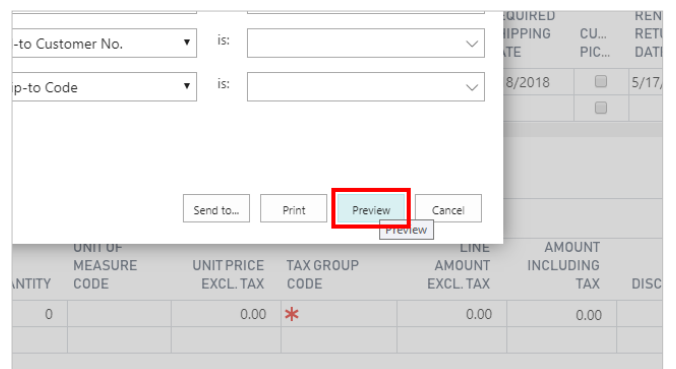
Click on the navigation menu item **Print...**



The screenshot shows the 'Rental Contract' form for 'RC00026'. The navigation menu at the top includes 'Dynamics 365', 'Business Central', and 'Rental Contracts - Open > Rental Contract · R'. The form has tabs for 'Process', 'Contract', 'Rental', 'Actions', and 'Navigation'. The 'Print...' button is highlighted with a red box. Below the tabs, there are buttons for 'Print...' and 'Print Proforma'. The 'General' section shows 'Sell-to Customer Name' as 'Adatum Corporation' and 'Quote No.' as an empty field.

Select the applicable options as related to your organization.

Click on the button **Preview**



The screenshot shows the 'Rental Contract' form for 'RC00026'. The navigation menu at the top includes 'Dynamics 365', 'Business Central', and 'Rental Contracts - Open > Rental Contract · R'. The form has tabs for 'Process', 'Contract', 'Rental', 'Actions', and 'Navigation'. The 'Preview' button is highlighted with a red box. Below the tabs, there are buttons for 'Send to...', 'Print', 'Preview', and 'Cancel'. The 'General' section shows 'Sell-to Customer No.' and 'p-to Code' as empty fields. The 'Preview' button is highlighted with a red box. Below the buttons, there is a table with columns: 'UNIT OF MEASURE CODE', 'UNIT PRICE EXCL. TAX', 'TAX GROUP CODE', 'LINE AMOUNT EXCL. TAX', 'AMOUNT INCLUDING TAX', and 'DISC'. The table has one row with values: '0', '0.00', '*', '0.00', '0.00', and an empty cell.

Example of the Previewing of the Contract.



CRONUS USA, Inc. 7122 South Ashford Street Westminster Atlanta, 31772		Rental Contract		Page: 1	
		Rental Contract Number:		RC00026	
		Rental Contract Date:		4/18/2018	
Sell To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772		Ship To: Adatum Corporation Robert Townes 192 Market Square Atlanta, GA 31772		P.O. Number Customer ID 10000 SalesPerson Peter Saddow	
				Ship Via Terms	

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
BD-006	Buckeye Ditcher	BD-006	1		550.00
Rental	Apr 18, 2018 to May 17, 2018		1 @ 500.00/Month = 500.00		
Damage Waiver	Apr 18, 2018 to May 17, 2018		1 @ 50.00/Month = 50.00		
Rental Returns Rental equipment must be cleaned prior to return Equipment using diesel or gas are to be filled up If fuel is not topped up an additional charge will be levied to cover topping up the fuel					

4.16. Certificates of Insurance Tracking

4.16.1. Certificate of Insurance Tracking Overview

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.

On Rental Management Setup an organization can specify whether they want to verify that customers do have a valid certificate or not, and chose whether only a warning occurs, or an error occurs preventing the shipment of the rental units. An Override Insurance Verification field is provided on the Rental Quote and Rental Contract which will override the Rental Management Setup settings of Warning and Error.

On the Customer card a listing of the certificates obtained from the customer over the years can be maintained, including the expiry date, coverage amount, deductible and an imported picture of the certificate or a pdf file of the certificate.

On the Customer card, Rental Quote and Rental Contract a fact box has been added to provide visibility as to the expiry date, coverage and deductible of the most recent certificate. If an image had been imported into the customer certificates of insurance, then the image is displayed as well. If a pdf file had been imported, then the document can be opened from the fact box.

4.16.2. How to Setup Certificates of Insurance

4.16.2.1. Overview

The setups for the Certificate of Insurance tracking are completed on Rental Management Setup and the Customer card.

On Rental Management Setup, three options are provided related to the verification of Certificates of Insurance. None, Warning and Error.

None:

None is the default setting, where no verification occurs. No notification, warning or errors will occur.

Warning:

Warning will provide a notification when creating a Rental Quote or Rental Contract when select a:

- Customer who does not have a Certificate of Insurance.
- Customer with a Certificate of Insurance which has expired prior to the Posting Date.
- Rental Lines are entered, and the End Billing Date is later than the expiry date of the Certificate of Insurance.

If the user closes the notification, it will not occur again unless the following date changes are made by the user:

- If Posting Date is changed to date later than expiry date.
- If the Rental Return Date that defaults on Rental Line is before expiry date, and the Billing End Date has not been modified, then the user changes the return date to a date that is later than the expiry date.
- If the Billing End Date is changed to be later than expiry date.
- If the Return Date is blank on the entry of the Rental Unit (Default Blank Return Date on Rental Management Setup is enabled), then if Billing End Date is entered that is later than expiry date.
- If the Return Date is blank on the entry of the Rental Unit (Default Blank Return Date on Rental Management Setup is enabled), then the Return Date is entered that is later than expiry date.

Warning will provide a confirmation message on selecting Ship Rentals on the Rental Contract or the To Ship list when:

- The Customer does not have a Certificate of Insurance
- The Billing End Date on the Rental Line is later than the expiry date

If user selects Yes, then the shipment processes. If user selects No, then the shipment will be aborted.

Error:

The Error option provides:

- Notifications, the same as the Warning option does.
- An error message, preventing shipment of the units on the contract when there is not a Certificate of Insurance or the Billing End Date on the Rental Line is later than the Customers most recent Certificate of Insurance's expiry date.

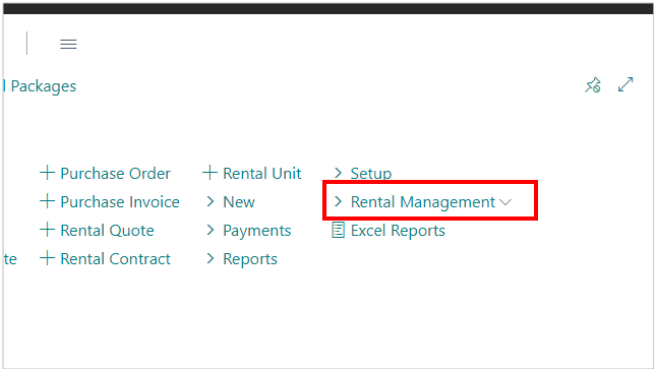
If on the Rental Quote or Rental Contract, the Override Insurance Verification field is enabled, then no verification of Certificates of Insurance will occur.

4.16.2.2. Setting up Certificates of Insurance Tracking on Rental Management Setup

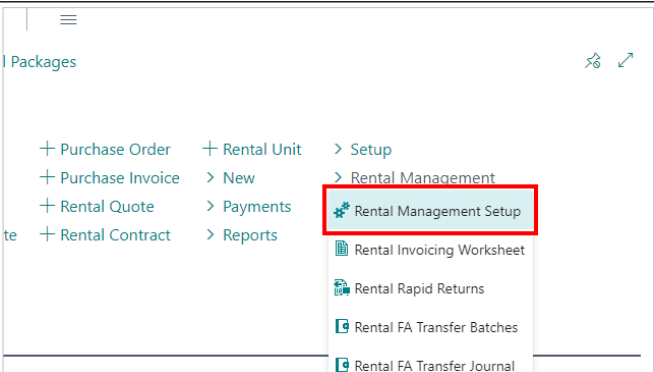
The following demonstrates the setup on Rental Management Setup so that a warning message is provided when creating a Rental Quote or Rental Contract and the customer card does not have a valid certificate for the dates on the contract.



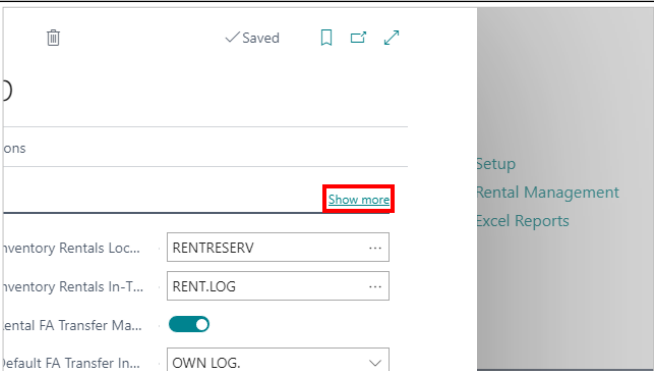
Click on the navigation menu item popup **Rental Management**



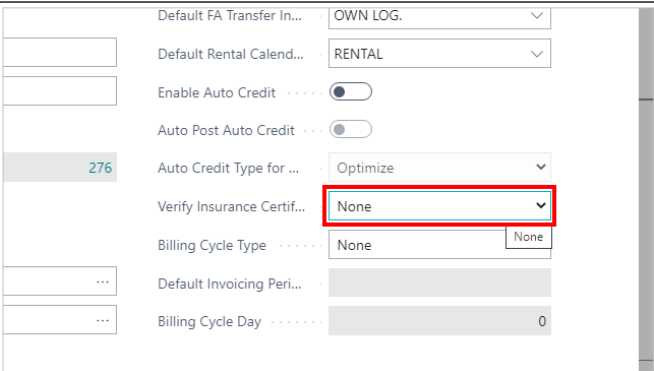
Click on the navigation menu item **Rental Management Setup**



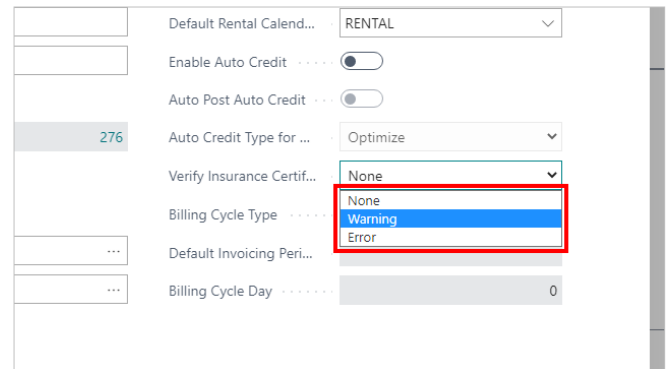
Click on the button **Show more**



Click on the field **Verify Insurance Certificate**



Click on the item **Warning** in the list

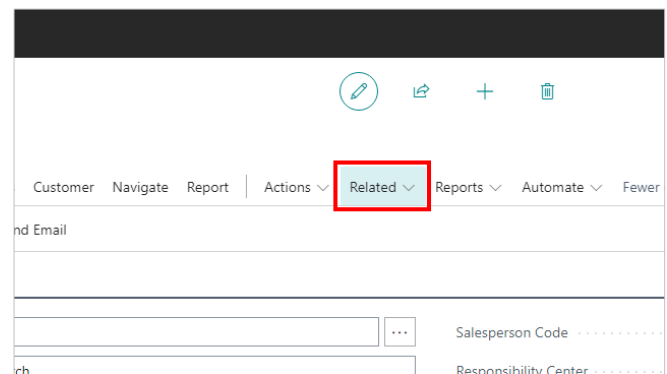


The screenshot shows a configuration form with several settings. The 'Verify Insurance Certificate' dropdown menu is open, showing three options: 'None', 'Warning', and 'Error'. The 'Warning' option is highlighted with a blue background and is enclosed in a red rectangular box.

4.16.2.3. Setting up Certificates of Insurance on Customer Cards

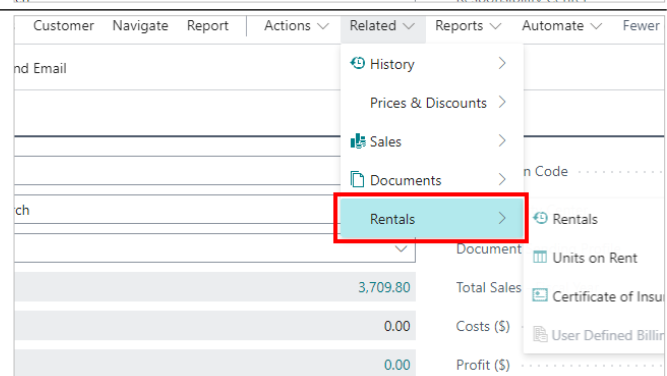
The following demonstrates the entry of a certificate, and the import of an image file of the certificate on a Customer card.

Click on the navigation menu item popup **Related**



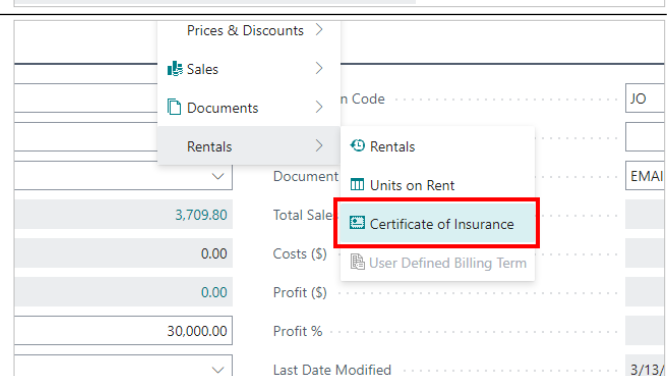
The screenshot shows the top navigation bar of the application. The 'Related' menu item is highlighted with a red rectangular box. Other visible menu items include 'Customer', 'Navigate', 'Report', 'Actions', 'Reports', 'Automate', and 'Fewer'.

Click on the navigation menu item popup **Rentals**



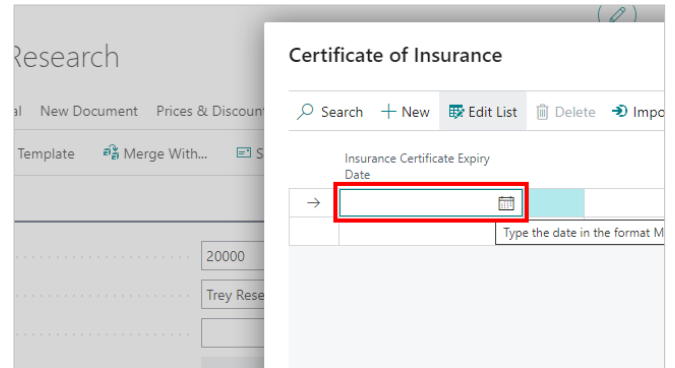
The screenshot shows the 'Related' dropdown menu open. The 'Rentals' option is highlighted with a red rectangular box. Other options in the menu include 'History', 'Prices & Discounts', 'Sales', 'Documents', 'Units on Rent', 'Certificate of Insurance', and 'User Defined Billing Term'.

Click on the navigation menu item **Certificate of Insurance**



The screenshot shows the 'Rentals' dropdown menu open. The 'Certificate of Insurance' option is highlighted with a red rectangular box. Other options in the menu include 'Units on Rent', 'Certificate of Insurance', and 'User Defined Billing Term'.

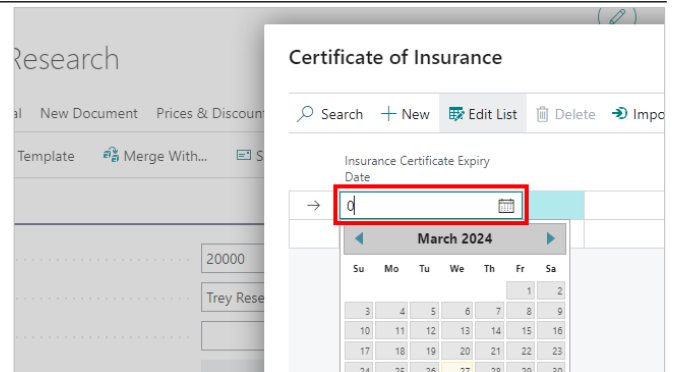
Click on the cell **Insurance Certificate Expiry Date**



The screenshot shows the 'Certificate of Insurance' form. The 'Insurance Certificate Expiry Date' field is highlighted with a red box. The field contains a calendar icon and a text input area. Below the field, there is a note: 'Type the date in the format M'.

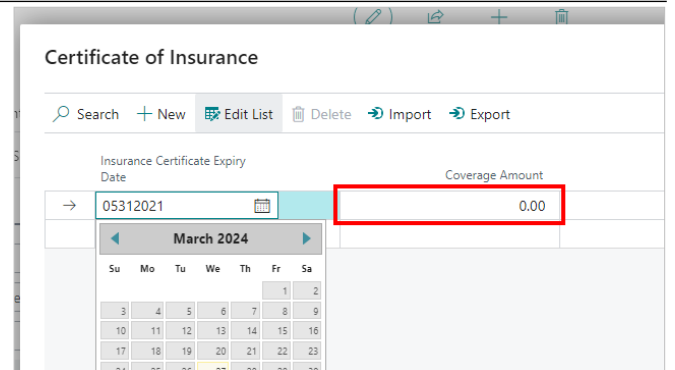
Enter **Insurance Certificate Expiry Date**.

Either type in the Expiry Date or use the calendar to move to the Month and Year the certificate will expire in and select the date of expiry.



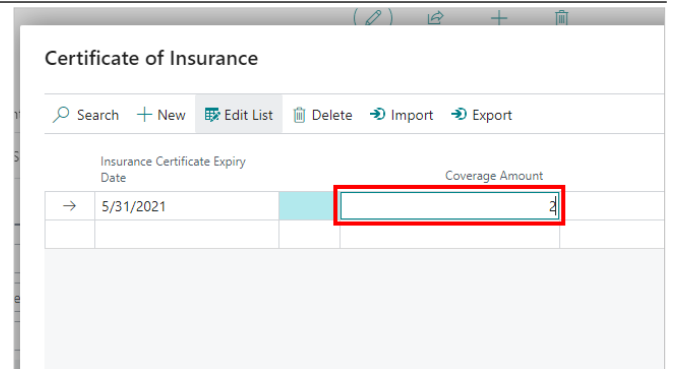
The screenshot shows the 'Certificate of Insurance' form. The 'Insurance Certificate Expiry Date' field is highlighted with a red box. A calendar dropdown is open, showing the month of March 2024. The calendar grid shows days from Sunday to Saturday.

Click on the cell **Coverage Amount** with the value **0.00**



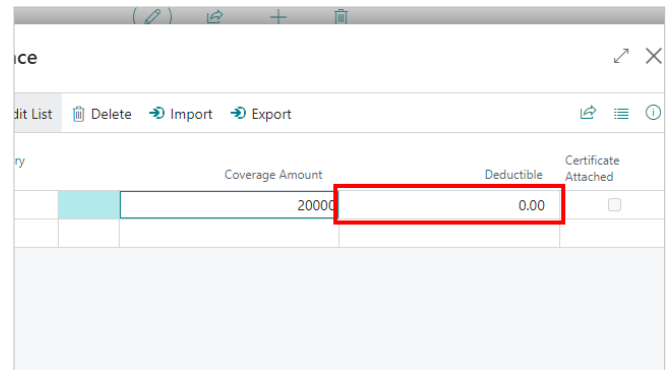
The screenshot shows the 'Certificate of Insurance' form. The 'Coverage Amount' field is highlighted with a red box. The field contains the value '0.00'. The 'Insurance Certificate Expiry Date' field is also visible, showing the date '05/31/2021' and a calendar icon.

Enter the text **20000**.



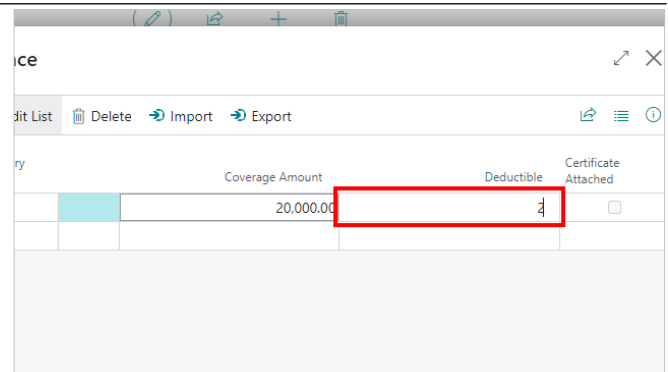
The screenshot shows the 'Certificate of Insurance' form. The 'Coverage Amount' field is highlighted with a red box. The field contains the value '20000'. The 'Insurance Certificate Expiry Date' field is also visible, showing the date '5/31/2021' and a calendar icon.

Click on the cell **Deductible** with the value **0.00**



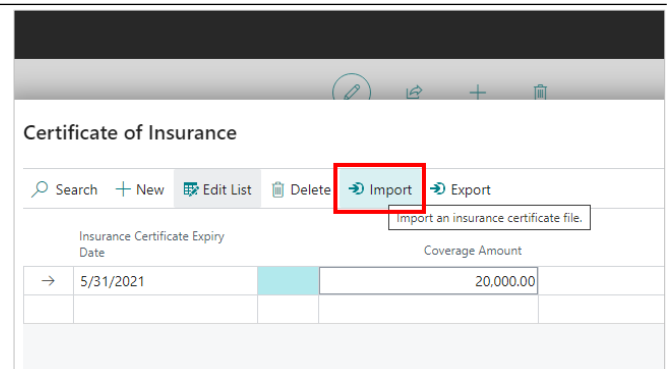
ry	Coverage Amount	Deductible	Certificate Attached
	20000	0.00	<input type="checkbox"/>

Enter the text **2000**.



ry	Coverage Amount	Deductible	Certificate Attached
	20,000.00	2000	<input type="checkbox"/>

Click on the navigation menu item **Import**



Certificate of Insurance

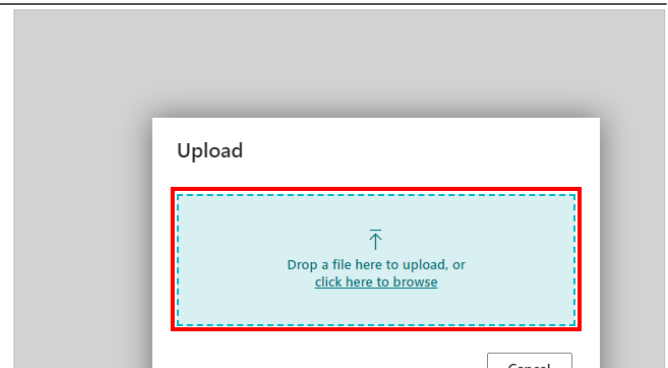
Search + New Edit List Delete **Import** Export

Import an insurance certificate file.

Insurance Certificate Expiry Date	Coverage Amount
→ 5/31/2021	20,000.00

Click on ☐ **Drop a file here to upload, or click here to browse**

Either drag and drop the Certificate of Insurance file in the box or click on the wording "click here to browse", then browse to where the file is located, select the file, and select open.



Click on the cell **Certificate Attached** with the value **on**

Coverage Amount	Deductible	Certificate Attached
20,000.00	2,000.00	<input checked="" type="checkbox"/>

Additional fields are available to add to the Certificates of Insurance page using Personalize. The fields available are Filename, File Type and File Extension.

On the Customer card fact boxes, the Certificate of Insurance fact box is on the Details tab, beneath the Dimensions fact box.

The following picture displays the information of the record just added to the customer card.

Certificate of Insurance

Sample Certificate of Insurance (COI)
The COI must meet all mandatory requirements shown in red to exhibit as an EOI event.

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFIRMS THE CONTENTS OF THE POLICY ITSELF. THIS CERTIFICATE DOES NOT REPRESENT OR GUARANTEE THE ACCURACY OF THE INFORMATION PROVIDED BY THE POLICYHOLDER. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURANCE AUTHORIZED REPRESENTATIVE OF THE PRODUCER AND THE CERTIFICATE HOLDER.

IMPORTANT: It is the certificate holder's responsibility to verify the accuracy of the information provided by the insured. It is the insured's responsibility to verify the accuracy of the information provided by the insured. It is the insured's responsibility to verify the accuracy of the information provided by the insured.

INSURED: Environmental Systems Research Institute, Inc.
100 New York Street, Rockville, MD 20850-4200

COVERAGE: General Liability, Commercial Auto, Professional Services, Cyber Liability, Directors and Officers Liability, Employment Practices Liability, Fidelity and Bond, Crime, and more.

COVERAGE AMOUNTS: General Liability: \$20,000,000; Commercial Auto: \$2,000,000; Professional Services: \$1,000,000; Cyber Liability: \$5,000,000; Directors and Officers Liability: \$1,000,000; Employment Practices Liability: \$1,000,000; Fidelity and Bond: \$1,000,000; Crime: \$1,000,000.

DEDUCTIBLE: General Liability: \$2,000; Commercial Auto: \$2,000; Professional Services: \$2,000; Cyber Liability: \$2,000; Directors and Officers Liability: \$2,000; Employment Practices Liability: \$2,000; Fidelity and Bond: \$2,000; Crime: \$2,000.

EXPIRATION DATE: 5/31/2021

COVERAGE AMOUNT: 20,000.00

DEDUCTIBLE: 2,000.00

From the fact box the listing of the Certificates of Insurance can be opened, and if the file imported is a pdf file, the file can be opened.

The following demonstrated the above.



ODT Rentals Online Help

Click on the link **Certificate of Insurance**

Show more

Code ↑

Value Code

Posting

(There is nothing to show in this view)

Certificate of Insurance

Actions for Certificate of Insurance

Insurance Certificate Expiry D...5/1/2020

Coverage Amount15,000.00

Deductible1,500.00

Click on the menu item **Open Certificate of Insurance**
The Customer, Certificates of Insurance page will open.

Show more

Code ↑

Value Code

Posting

(There is nothing to show in this view)

Certificate of Insurance

Open Certificate of Insurance

Show Document5/1/20

Coverage Amount15,000.

Deductible1,500.

The following demonstrates how to open an attached pdf file containing the Certificate of Insurance.

Click on the link **Certificate of Insurance**

Show more

Code ↑

Value Code

Posting

(There is nothing to show in this view)

Certificate of Insurance

Insurance Certificate Expiry D...5/1/2020

Coverage Amount15,000.00

Deductible1,500.00

Click on the menu item **Show Document**

Show more

Code ↑

Value Code

Posting

(There is nothing to show in this view)

Certificate of Insurance

Open Certificate of Insurance

Show Document

5/1/20


Coverage Amount15,000.

Deductible1,500.

Copy Sell-to Addr. to Qte From	Company
Tax Liabile	<input checked="" type="checkbox"/>
Tax Area Code	MIAMI, FL
Tax Identification Type	Legal Entity
Tax Exemption No.	

Payments

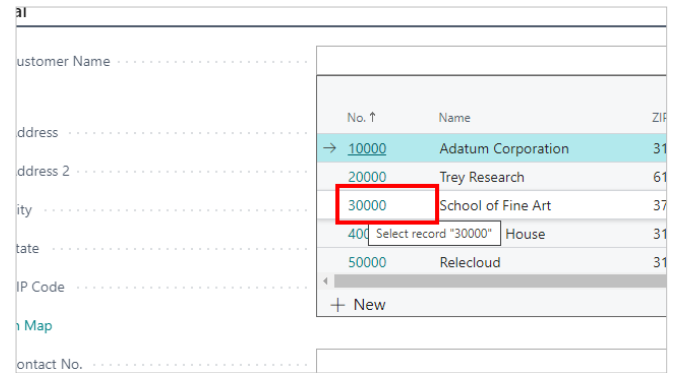
Payment Terms Code	CM
--------------------------	----

 Certificate of Insur....pdf

Rental Terms			
Rental Units			
Rental Packages			
Actions			
+ Sales Quote	+ Purchase Order	+ Rental Unit	> Se
+ Sales Order	+ Purchase Invoice	> New	> R
+ Sales Invoice	+ Rental Quote	> Payments	Ex
+ Purchase Quote	+ Rental Contract	> Reports	

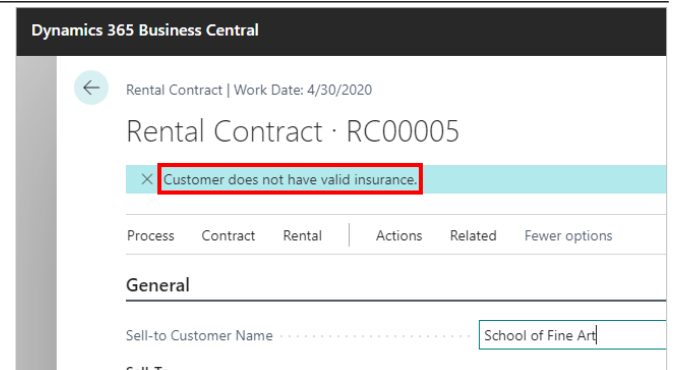
[illegible]

Click on the link in cell **No.** with the value **30000**



No.	Name	ZIP
10000	Adatum Corporation	31
20000	Trey Research	61
30000	School of Fine Art	37
40000	Select record "30000" House	31
50000	Relecloud	31

Click on **Customer does not have valid insurance.**
Note that the notification message occurs when the customer is selected and the Posting Date is later than the expiry date on the certificate..



Dynamics 365 Business Central

Rental Contract | Work Date: 4/30/2020

Rental Contract · RC00005

Customer does not have valid insurance.

Process Contract Rental Actions Related Fewer options

General

Sell-to Customer Name School of Fine Art

When a notification message occurs, the user can review the status of the customers Certificates of Insurance in the fact box.

The expiry date, coverage amount and deductible are displayed when there is a certificate of insurance setup on the customer card.

When the certificate is an image file, then the picture will be displayed. When the attached document is a pdf file it can be viewed using the following steps.

Click on **Certificate of Insurance Insurance**



Sales Line Attachments

Documents 0

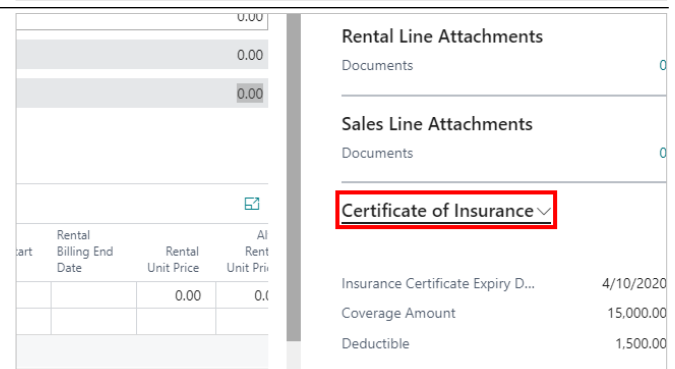
Certificate of Insurance

Insurance Certificate Expiry Date 4/10/2020

Coverage Amount 15,000.00

Deductible 1,500.00

Click on the link **Certificate of Insurance**



Rental Line Attachments

Documents 0

Sales Line Attachments

Documents 0

Certificate of Insurance

Insurance Certificate Expiry Date 4/10/2020

Coverage Amount 15,000.00

Deductible 1,500.00



Click on the menu item **Show Document**

Sales Line Attachments
Documents

Certificate of Insurance ▾

- Open Certificate of Insurance
- Show Document

4/10/20
Coverage Amount 15,000.
Deductible 1,500.

Click on the button **Certificate of Insurance (4).pdf**.

Override Insurance Verification ☒

Quote No.
Posting Date 4/15/2020

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code		
→ RU00008	⋮	18 G Brad Nailers Group	MONTH-PEND		

Certificate of Insur....pdf ^

Click on the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code		
→					

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines	Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code		
→	⋮				

- RENT-PKG
- 1231
- RENT-QTE
- RENT-RTN

More options



ODT Rentals Online Help


Click on the link in cell **No.** with the value **RU00008**

BD-006	Buckeye Ditcher	<input type="checkbox"/>
RU00002	Buckeye Ditcher	<input type="checkbox"/>
RU00003	Buckeye Ditcher	<input type="checkbox"/>
RU00004	Buckeye Ditcher	<input type="checkbox"/>
RU00005	Buckeye Ditcher	<input type="checkbox"/>
SUB BUCKEYE	Sub Buckeye Ditcher	<input type="checkbox"/>
RU00008	18 G Brad Nailers Group	<input checked="" type="checkbox"/>
RU00008-001	18 G Brad Nailer	<input type="checkbox"/>
RU00008-002	18 G Brad Nailer	<input type="checkbox"/>
RU00008-003	18 G Brad Nailer	<input type="checkbox"/>
RU00008-004	18 G Brad Nailer	<input type="checkbox"/>
RU00008-005	18 G Brad Nailer	<input type="checkbox"/>

Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R
18 G Brad Nailers Group	MONTH-PEND	0				4/
More options						

Enter the text **1**.

4/15/2020				Outstanding Amount		
Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
5 Brad Nailers Group	MONTH-PEND	1				4/15/2020

Click on the cell **Location Code**

Functions Related Fewer options						
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
18 G Brad Nailers Group	MONTH-PEND	1				4/15/2020
More options						



Click on the link in cell **Code** with the value **EAST**

	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
ilers Group	MONTH-PEND	1				4/15/2020	5/14/2020
ailers Group	MONTH-PEND	1					
			bin				
			RENT-PKG				
			EAST				
			RENTRESERV				
			SOUTH				
			TEMP				
			+ New				

Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code			
→ RU00008	:	18 G Brad Nailers Group	MONTH-PEND			
	:	18 G Brad Nailers Group	MONTH-PEND			
Sales Lines		Manage	More options			

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Related	Fewer options
Rental Unit No.	Stand... Text Code	Description	Rental Terms Code			
RU00008		18 G Brad Nailers Group	MONTH-PEND			
→		18 G Brad Nailers Group	MONTH-PEND			
<div>←</div>						
Sales Lines		Manage	More options			

Click on the link in cell **No.** with the value **RU00008-001**

Rental Unit List					Manage	Line	Functions	Related	Fewer options	Show as me
No. ↑	Description	Group ↑								
→ RU00008-001	18 G Brad Nailer									
RU00008-002	18 G Brad Nailer									
RU00008-003	18 G Brad Nailer									



ODT Rentals Online Help

Click on the toggle field Override Insurance Verification

Self-to ZIP Code 37123

Show On Map

Sell-to Contact No. CT000005

Sell-to Contact Meagan Bond

Customer Rental Instructions No

Override Insurance Verification ☒

Quote No.

Posting Date 4/15/2020

Click on the navigation menu item Ship Rentals

Dynamics 365 Business Central

Rental Contract | Work Date: 4/15/2020

Rental Contract · RC00005

Process Contract Rental Actions Related Fewer options

Ship Rentals Ship and Send... Return Rentals Return and Ser

General Post the shipment of the rental units on the rental lines. A posted delivery document is created for each posted delivery.

Sell-to Customer Name School of Fine Art

Sell-To

Sell-to Address 10 High Tower Green

Click on the button Yes

Are you sure you want to Ship this rental contract?

Yes No

Original Time Zone Mountain Standard Time

Current Time Zone Mountain Standard Time

Time Zone Difference

Click on the button OK

Shipment Posted Successfully.

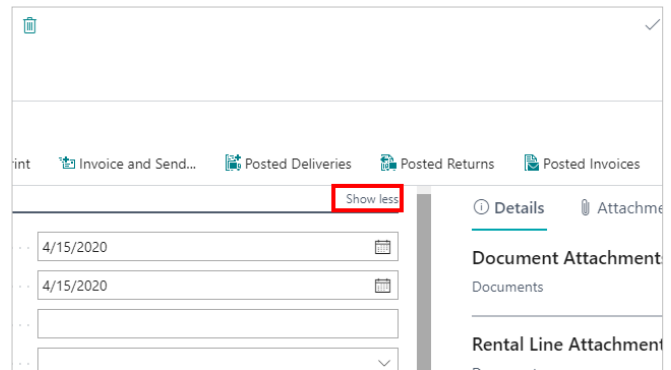
OK

Original Time Zone Mountain Standard Time

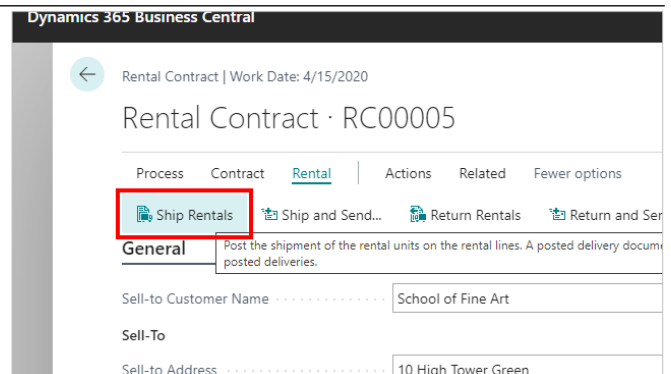
Current Time Zone Mountain Standard Time

Time Zone Difference

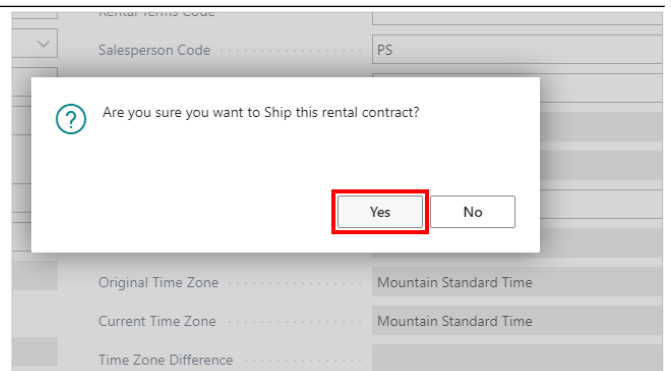
Click on the button **Show more**



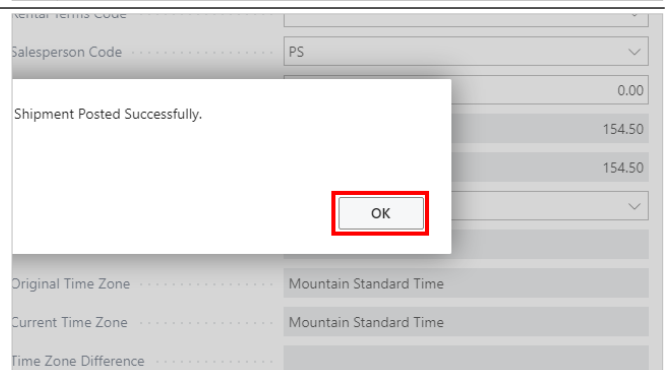
Click on the navigation menu item **Ship Rentals**



Click on the button **Yes**



Click on the button **OK**



4.16.3.2. Example 2: Customer has a valid Certificate of Insurance

In this example, the Customer has a Certificate of Insurance configured, with an expiry date of May 31, and an image of the certificate had been imported.

The Rental Contract will be created on April 15, and a Rental Unit will be added to the rental lines with a monthly rental term.

The Rental Return Date will be modified from the defaulted date of May 14 to June 14 for a 2 month contract, which will update the Rental Billing End Date. The updating of the Billing End Date to be later than the expiry date of the insurance certificate will trigger the notification message.



Click on the link **Rental Contract**

Rental TermsRental UnitsRental Packages

Actions

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

+ Rental Quote

+ Rental Contract

+ Rental Unit

> New

> Payments

> Reports

> Se

> R

Ex

Units Ship/Return

Click on the lookup button **Sell-to Customer Name**

tionsRelatedFewer options

Print Proforma Invoice...

Print Pick List...

Copy Document

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on the link in cell **No.** with the value **20000**

General

Sell-to Customer Name

Quote No.

Posting Date

Order Date

Document Date

No. ↑NameZIP

→ 10000Adatum Corporation31

20000Trey Research61

30000School of Fine Art37

40000Alpine Ski House31

50000Relecloud31

+ New

Rental LinesManageLineFunctionsRelatedFewer options

Click on the cell **Rental Unit No.**

Rental LinesManageLineFunctionsRelatedFewer options

Rental Unit No.

Stand... Text Code

Description

Rental Terms Code

→

Sales LinesManageMore options

ODT Rentals Online Help

5/15/2024

2318/2540



ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

The screenshot shows the 'Rental Lines' table with columns: Rental Unit No., Stand... Text Code, Description, and Rental Terms Code. A dropdown menu is open for the 'Rental Unit No.' field, showing dates 7/26/2020 and 10/4/2020. A red box highlights the lookup button (three dots) in the 'Rental Unit No.' cell.

Click on the cell **No.** with the value **RU00008**

The screenshot shows the 'Rental Lines' table with columns: No., Description, and a checkbox. The row for 'RU00008' is highlighted with a red box. The description for 'RU00008' is '18 G Brad Nailers Group'.

Click on the link in cell **No.** with the value **RU00008**

The screenshot shows the 'Rental Lines' table with columns: No., Description, and a checkbox. The row for 'RU00008' is highlighted with a red box. A link icon (arrow) is visible in the 'No.' column for 'RU00008'.

Click on the cell **Rental Terms Code** with the value **MONTH-PEND**

The screenshot shows the 'Rental Lines' table with columns: Stand... Text Code, Description, Rental Terms Code, Rental Quantity, Location Code, and Rental Terms Code Alt1. The row for 'MONTH-PEND' is highlighted with a red box. The description for 'MONTH-PEND' is '18 G Brad Nailers Group'.



Click on the cell **Rental Quantity** with the value **0**

Line	Functions	Related	Fewer options			
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date
18 G Brad Nailers Group	MONTH-PEN	0				4/15/2020
More options						

Enter the text **1**.

Line	Functions	Related	Fewer options				
Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R	D
18 G Brad Nailers Group	MONTH-PEND	<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div><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Click on the cell **Location Code**

Functions							Related	Fewer options	
on	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date			
ad Nailers Group	MONTH-PEND					4/15/2020			

Click on the link in cell **Code** with the value **EAST**

Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date
18 G Brad Nailers Group	MONTH-PEND	1			4/15/2020	5/14/2020
18 G Brad Nailers Group	MONTH-PEND	1				
More options						
Location Code						
Code ↑ Name						
→ CENTRAL Central Warehouse						
EAST East Warehouse						
REN Select record "EAST" Inventory Items Rental Rese						
SOUTH South Warehouse						
TEMP Temporary Location						
WEST West Warehouse						
+ New						



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Click on the cell **Rental Return Date** with the value **5/14/2020**

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00

Click on the link in cell **Rental Return Date** with the value **5/14/2020**

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00

Click on the link **Next**

Rental Start Date	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price	Alt Rent Unit Price
4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00	0.00
4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00	0.00

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Click on a date in the calendar

Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date	Rental Return Date	Rental Billing Start Date	Rental Billing End Date	Rental Unit Price
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00
EAST			4/15/2020	5/14/2020	4/15/2020	5/14/2020	150.00

June 2020

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Gl	Amount Including Tax	Line
0		0.00	*	0.00	

4.17. Transferring a Fixed Asset to Inventory

4.17.1. Fixed Asset Transfer to Inventory Overview

4.17.1.1. Overview

Some equipment rental companies will move Fixed Assets to the inventory module for resale. These Fixed Assets could be part of the rental fleet or theoretically be any fixed asset, such as a delivery truck, company pickup truck.

The Fixed Asset Transfer to Inventory provides the capability to automatically transfer the asset to a resale inventory Item with Item Tracking Serial Nos.

A FA G/L journal and an Item Journal are automatically created and posted by default, thus generating the appropriate entries. An option is available to Show Journals and Post manually.

IMPORTANT NOTE

The No. Series setup for the FA G/L Journal and the Item Journal must have the Manual Nos. field checked in addition to the Default Nos.

The F/A GL Journal records the disposal of the Fixed Asset, which can be at the current net book value of the asset or can be a different Transfer Value.

The entry will be a Disposal entry type. When the Transfer Value is equal to the Net Book Value, the result will be a zero gain or loss on disposal. If the Transfer Value used is different value than the Book Value, then a gain or loss will be posted.

The posting of the journal will result in the update of both the fixed asset sub ledger and the general ledger.

IMPORTANT NOTE

The transfer will be based on the accumulated depreciation posted against the Fixed Asset at the time of the transfer.

The Fixed Asset card, Inactive field will be enabled when the automatic posting of the journal is completed. When a Fixed Asset card and Rental Unit card are linked, then both will have the Inactive field automatically enabled when the journals are automatically posted.

If the journals are posted manually, then the Fixed Asset card, Inactive field must be manually enabled.

An Item Journal Batch is automatically created and posted based on the User ID. The item journal entry created and posted will have the Unit Amount and the Unit Cost set to equal the Transfer Value used as the proceeds for the Fixed Asset disposal.

The related Item Tracking line will be populated with a Serial No., which is automatically created.

- If there is a Serial No. on the Fixed Asset, then the Item Serial No. created automatically is set to Fixed Asset No. + Serial No.
- If there is not a Serial No. on the Fixed Asset, then the Serial No is set to the Fixed Asset No.

The posting of the journal will result in the update of both the item ledgers and the general ledger. Should the specified Location to transfer to have Bin Mandatory enabled, then the applicable Warehouse ledger entries are created for the Bin specified.

The Document No. and the Description on both journals are automatically created during the transfer process.

Fixed Assets transfers are not allowed for the following:

- The Fixed Asset card has the Blocked or Inactive fields enabled.
- The Fixed Asset is linked to a Rental Unit and the unit has a Reservation Entry as is committed on a Rental Quote, on a Rental Contract Rental Line, or has a Service Status setting where the unit is not available for rent.



NOTE:

The FA Transfer to Inventory is allowed when the Fixed Asset is linked to a Rental Unit which has the Inactive field enabled.

IMPORTANT NOTES

- For the FA Transfer to Inventory it is mandatory that the G/L Account specified in the Direct Cost Applied Account in the General Posting Setup has the Direct Posting field enabled. If it is not, then an error will occur, and the transfer process will be aborted.
- When Dimensions are setup on the Fixed Asset, Item or G/L Accounts that the transactions post to that are setup with a Dimension Code, without a Dimension Value and a Value Posting of Code Mandatory the journals cannot be posted automatically as an error will occur.
- Should the organization require the setup of the Dimension Code without a Dimension Value and with Code Mandatory, then the journals will have to users will need to enable the option, Open Journals and Post manually, which is available when processing the FA Transfer to Inventory. The Dimensions must be entered prior to posting. When the journals are posted manually, the Fixed Asset card, Inactive field must be enabled manually after posting the journals.
- The No. Series for the FA G/L Journal, FA Journal and the Item Journal must have the Manual Nos. enabled as the Document No. on the journals are automatically created and do not use the Default Nos. on the No. Series.

4.17.1.2. Setup of the Inventory Item Information

The following are mandatory conditions related to the Item card that the Fixed Assets are to be transferred to.

- Item must have Item Tracking turned on and the Item Tracking Code has Serial No. tracking, which has the tracking turned on for both Sales and Purchases. And the Create SN info. on posting field should as well be turned on.
- The Item must have a Costing Method of Specific, so that the cost can tracked for the specific FA transferred, even if multiple FA are transferred to the Item.

Example of an Item Tracking Code Serial No. Tab Settings

Serial No.	
General	
SN Specific Tracking	<input checked="" type="checkbox"/>
SN Rental Tracking	<input type="checkbox"/>
Create SN Info. on po...	<input checked="" type="checkbox"/>
Inbound	
SN No. Info. Must Exist	<input type="checkbox"/>
SN Purchase Tracking	<input checked="" type="checkbox"/>
SN Sales Tracking	<input checked="" type="checkbox"/>
SN Positive Adjmt. Tra...	<input checked="" type="checkbox"/>
SN Negative Adjmt. Tr...	<input checked="" type="checkbox"/>
SN Assembly Tracking	<input checked="" type="checkbox"/>
Outbound	
SN Warehouse Tracking	<input checked="" type="checkbox"/>
SN Transfer Tracking	<input checked="" type="checkbox"/>
SN No. Info. Must Exist	<input type="checkbox"/>
SN Purchase Tracking	<input checked="" type="checkbox"/>
SN Sales Tracking	<input checked="" type="checkbox"/>
SN Positive Adjmt. Tra...	<input checked="" type="checkbox"/>
SN Negative Adjmt. Tr...	<input checked="" type="checkbox"/>
SN Assembly Tracking	<input checked="" type="checkbox"/>

4.17.1.3. Fixed Asset Transfer to Inventory Fields

FA Transfer to Inventory Request Page

Fixed Asset Transfer To Inventory

Options

From FA No. RU00023-003

To Inventory Item No.

Transfer Location Code

Transfer Bin Code

Transfer Description

Transfer Value 13,500.00

Book Value 13,500.00

Transfer Posting Date 7/1/2022

Show Journals and Post Manually ...

Advanced >

OK Cancel

The following provides an overview of the fields.

- **From FA No.:** Displays the Fixed Asset No. that is to be transferred which defaults from the asset card and cannot be edited.
- **To Inventory Item No.:** Enter or look-up and select the Item No. that the asset is to be transferred to.
- **Transfer Location Code:** Specify the Location Code the Item is to be located in.
- **Transfer Bin Code:** When the selected Location Code has the Bin Mandatory enabled, then the Bin Code must be specified.
- **Transfer Description:** The description is automatically populated with a default description which can be overridden.
- **Transfer Value:** The Book Value of the asset defaults to this field and can be overridden if the value is to be transferred to the Item is different than the Book Value of the asset.
- **Book Value:** Displays the current Net Book Value of the Fixed Asset and cannot be modified.
- **Transfer Posting Date:** Specify the Posting Date that is to be set on the FA G/L Journal and Item Journal.
- **Show Journals and Post manually:** Enable this field only when you want to review and post the journals manually. **NOTE:** When enabled and the journals are posted manually, then the Fixed Asset, Inactive field must be enabled manually after the journals are posted.

4.17.2. How to Process Fixed Asset Transfers to Inventory

4.17.2.1. Processing a FA Transfer to Inventory using the Book Value

The following demonstrates the processing of the FA Transfer to Inventory where the Transfer Value will be the same as the Book Value of the asset. The Depreciation has been calculated and posted up to the day before the transfer will occur on.



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Click on the field **Book Value**

Take notice of the Book Value amount.
The FA Ledger Entries open when the Book Value
amount is clicked on.

The screenshot shows a form with a 'Book Value' field highlighted by a red box, containing the value '13,500.00'. Other fields include 'Depreciation Table Co...' and 'Use Half-Year Conven...'. A 'Show less' link is visible in the top right corner.

Click on the cell **Amount** with the value **45,000.00**

Note that the Acquisition Cost was 45,000.00 and the
depreciation posted to June 30 is -31500.00.

Description	Posting Date	Amount	Department Code	Customergro...
n ... Ford 150 Truck	1/1/2019	45,000.00		
on Depn to June 30-2022	6/30/2022	-31,500.00		

Click on the navigation menu item popup **Actions**

The screenshot shows the 'Fixed Asset Card' for 'RU00023-003 · Ford 150 Truck'. The 'Actions' tab is highlighted by a red box. Other tabs include 'Process', 'Reports', 'Related', and 'Fewer options'. The 'General' section shows the asset number 'RU00023-003' and description 'Ford 150 Truck'.

Click on the navigation menu item popup **Functions**

The screenshot shows the 'Fixed Asset Card' for 'RU00023-003 · Ford 150 Truck'. The 'Functions' menu is highlighted by a red box. Other tabs include 'Process', 'Reports', 'Related', and 'Fewer options'. The 'Functions' menu includes options like 'Acquire', 'Copy Fixed Asset...', and 'Functions'.



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Click on the navigation menu item **FA Transfer to Inventory...**

Click on the lookup button **To Inventory Item No.**

Click on the link in cell **No.** with the value **1009**

Select the Item with Serial No. Item Tracking that the Fixed Asset is to be transferred to.

Click on the lookup button **Transfer Location Code**



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Click on the link in cell **Code** with the value **EAST**

Select the Location that the Item will be located in.

From FA No. RU00023-003
To Inventory Item No. 1009
Transfer Location Code
Transfer Bin Code
Transfer Description
Transfer Value
Book Value
Transfer Posting Date
Show Journals and Post Manually

Code ↑	Name
CENTRAL	Central Warehouse
EAST	East Warehouse
MA	Select record "EAST" Main Warehouse
NORTH	North Warehouse
OUT. LOG.	Outsourced Logistics
+ New	

Click on the field **Transfer Value**

Note that the defaulted Transfer Value is the same as the Book Value of the Fixed Asset, which will be used in this example.

From FA No. RU00023-003
To Inventory Item No. 1009
Transfer Location Code EAST
Transfer Bin Code
Transfer Description Fixed Asset No. RU00023-003 has been transferre
Transfer Value 13,500.00
Book Value 13,500.00
Transfer Posting Date 7/1/2022
Show Journals and Post Manually

Click on the field **Transfer Posting Date**

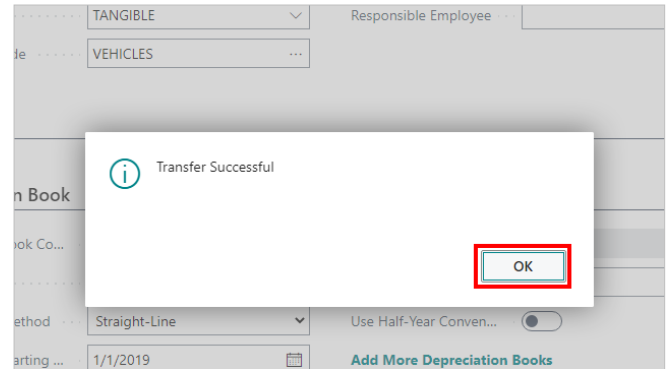
The date defaults from the Users Work Date. If the transfer is to occur and be posted on a different date enter or look-up and select the applicable date.

Transfer Location Code EAST
Transfer Bin Code
Transfer Description Fixed Asset No. RU00023-003 has been transferre
Transfer Value 13,500.00
Book Value 13,500.00
Transfer Posting Date 7/1/2022
Show Journals and Post Manually
Advanced >

Click on the button **OK**

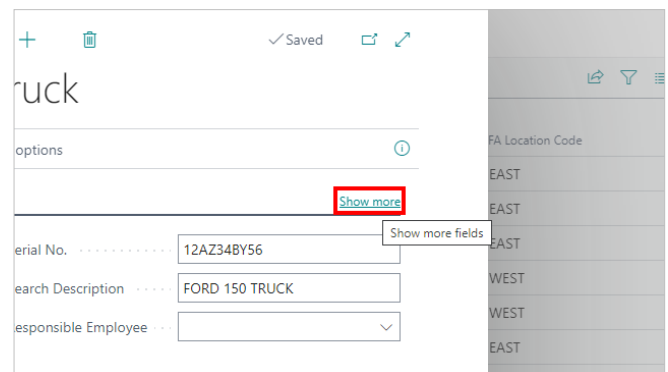
Posting Date 7/1/2022
Journals and Post Manually
OK Cancel

Click on the button **OK**



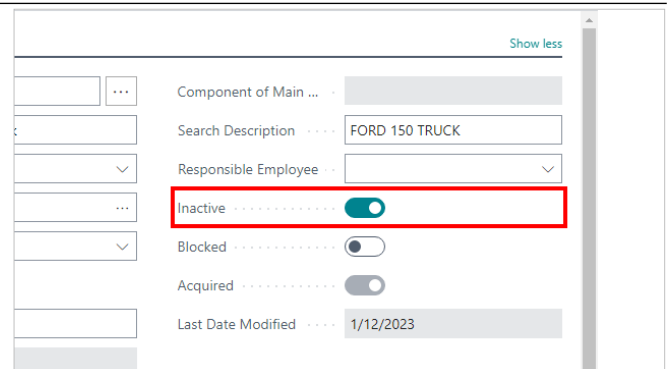
The following covers a review of the Fixed Asset card and the entries from the Fixed Asset.

Click on the button **General, Show more**



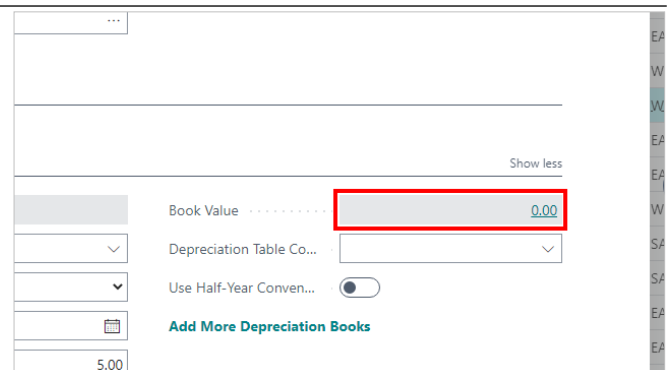
Click on **Inactive**

Note that the Inactive field has automatically enabled.



Click on the field **Book Value**

Note that the Book Value field on the FA card now displays 0.00.
The FA Ledger Entries will automatically be displayed when the Book Value amount is clicked on.





Click on the cell **Amount** with the value **-13,500.00**

Note that the Proceeds on Disposal is equal to what the Book Value was before the transfer.

The Acquisition entry after that is a credit for the initial Acquisition cost.

The Depreciation amount debits the Depreciation amount that was posted to June 30.

Posting Category	FA Posting Type	Description	Posting Date	Amount	Department Code
	Acquisition ...	Ford 150 Truck	1/1/2019	45,000.00	
	Depreciation	Depn to June 30-2022	6/30/2022	-31,500.00	
	Proceeds o...	Fixed Asset No. RU00023-003 ...	7/1/2022	-13,500.00	
Disposal	Acquisition ...	Fixed Asset No. RU00023-003 ...	7/1/2022	-45,000.00	-13,500.00
Disposal	Depreciation	Fixed Asset No. RU00023-003 ...	7/1/2022	31,500.00	

The following steps demonstrate how to view all the G/L Entries related to the posting of the FA G/L Journal and the Item Journal.

Click on the cell **FA Posting Category** with the value **Disposal**

Document No.	FA No.	Depreciation Book Code	FA Posting Category	FA Posting Type	Description
	RU00023-003	COMPANY		Acquisition ...	Ford 150 Truck
TO 06-30-2022	RU00023-003	COMPANY		Depreciation	Depn to June 30-2022
\$RU00023-003	RU00023-003	COMPANY		Proceeds o...	Fixed Asset No. RU00023-003
\$RU00023-003	RU00023-003	COMPANY	Disposal	Acquisition ...	Fixed Asset No. RU00023-003
\$RU00023-003	RU00023-003	COMPANY	Disposal	Depreciation	Fixed Asset No. RU00023-003

Click on the navigation menu item **Find entries...**

Dynamics 365 Business Central					
RU00023-003 · Ford 150 Truck					
FA Ledger Entries		Search	Find entries...	Actions	Related
Find entries and documents that exist for the selected entry (Navigate) (Ctrl+Alt+Q)					
FA Posting Date	Document Type	Document No.	FA No.	Book Code	
1/1/2019	Invoice	G05001	RU00023-003	COMPANY	
6/30/2022		DEPN-2 TO 06-30-2022	RU00023-003	COMPANY	
7/1/2022	Invoice	FATRANSRU00023-003	RU00023-003	COMPANY	
7/1/2022	Invoice	FATRANSRU00023-003	RU00023-003	COMPANY	

Click on the link in cell **No. of Entries** with the value **5**

By clicking on the number for the related G/L Entries then all entries related to the transfer will be displayed.

		No. of Entries
		5
1	Open record "5"	
1		
3		

G/L Entries from the FA Transfer to Inventory

Posting Date	Doc. Type	Document No.	G/L Account No.	Description	Amount	Bal. Account Type	Bal. Account No.
7/1/2022	Invoice	FATRANSRU00023-003	10900	Fixed Asset No. RU00023-003 has be...	31,500.00	G/L Account	
7/1/2022	Invoice	FATRANSRU00023-003	10800	Fixed Asset No. RU00023-003 has be...	-45,000.00	G/L Account	
7/1/2022		FATRANSRU00023-003	10700	Direct Cost on 07/01/22	-13,500.00	G/L Account	
7/1/2022		FATRANSRU00023-003	10700	Direct Cost on 07/01/22	13,500.00	G/L Account	
7/1/2022	Invoice	FATRANSRU00023-003	10700	Fixed Asset No. RU00023-003 has be...	13,500.00	Fixed Asset	RU00023-003

The Document No. created is used on both the FA G/L Journal and the Item Journal.

The Description created is only used on the entries created from the FA G/L Journal. The description contains the FA No. and the Item No. the asset is transferred to.

The full description on these entries for this example is:

Fixed Asset No. RU00023-003 has been transferred to Inventory Item No. 1009

FA G/L Journal Entries

- G/L Account 10900 Accumulated Depreciation is debited for the depreciation posted up to the date of transfer.
- G/L Account 10800 Equipment has been credited for the acquisition cost.
- G/L Account 10700 Inventory for the third 10700 record is the debit for the proceeds on disposal from the Transfer Value amount, which is the unit cost for the specific serialized item.

G/L Entries from the Item Journal:

- G/L Account 10700 Inventory for the first record and second 10700 records are the standard Direct Cost credit and debit entries generated when posting the Item Journal.

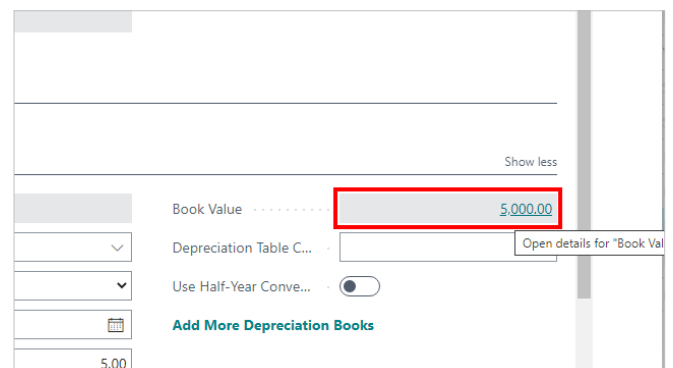
To review the Item Ledger Entry and Value Entry, click on the quantity in the Find Entries page.

4.17.2.2. Processing a FA Transfer to Inventory using Different Transfer Value

The following demonstrates the processing of the FA Transfer to Inventory where the Transfer Value will be greater than the Book Value of the asset. The Depreciation has been calculated and posted up to the day before the transfer will occur on.

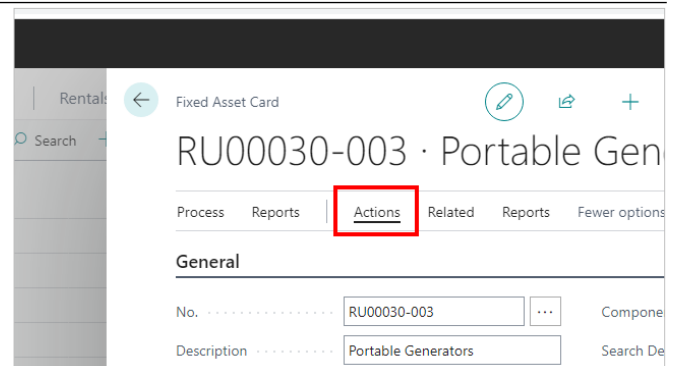
Click on the field **Book Value**

Take notice of the Book Value amount.
The FA Ledger Entries open when the Book Value amount is clicked on.



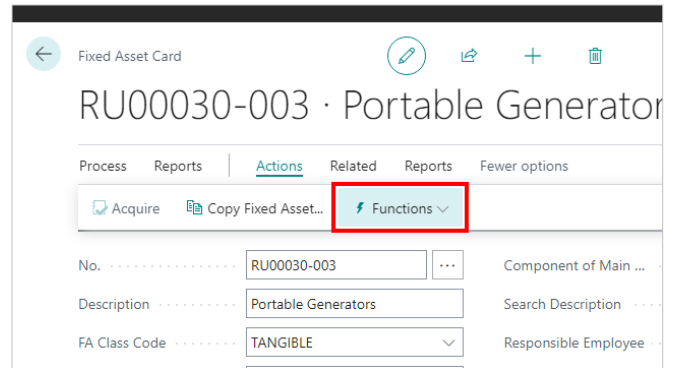
The screenshot shows the 'Fixed Asset Card' for 'RU00030-003 · Portable Gen'. The 'Book Value' field is highlighted with a red box and displays the amount '5,000.00'. Other fields include 'Depreciation Table C...', 'Use Half-Year Conve...', and a link to 'Add More Depreciation Books'. A 'Show less' link is also visible.

Click on the navigation menu item popup **Actions**



The screenshot shows the 'Fixed Asset Card' for 'RU00030-003 · Portable Gen'. The 'Actions' menu item is highlighted with a red box. The card displays the 'General' section with fields for 'No.' (RU00030-003) and 'Description' (Portable Generators).

Click on the navigation menu item popup **Functions**



Fixed Asset Card

RU00030-003 · Portable Generator

Process Reports **Actions** Related Reports Fewer options

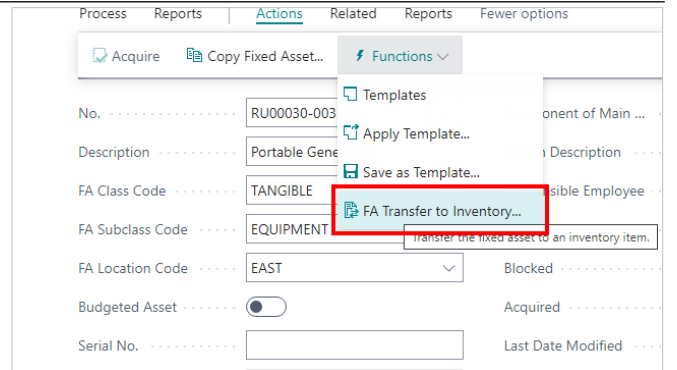
Acquire Copy Fixed Asset... **Functions**

No. RU00030-003 Component of Main ...

Description Portable Generators Search Description ...

FA Class Code TANGIBLE Responsible Employee ...

Click on the navigation menu item **FA Transfer to Inventory...**



Fixed Asset Card

RU00030-003 · Portable Generator

Process Reports **Actions** Related Reports Fewer options

Acquire Copy Fixed Asset... **Functions**

Templates

Apply Template...

Save as Template...

FA Transfer to Inventory...

No. RU00030-003 Component of Main ...

Description Portable Generators Search Description ...

FA Class Code TANGIBLE Responsible Employee ...

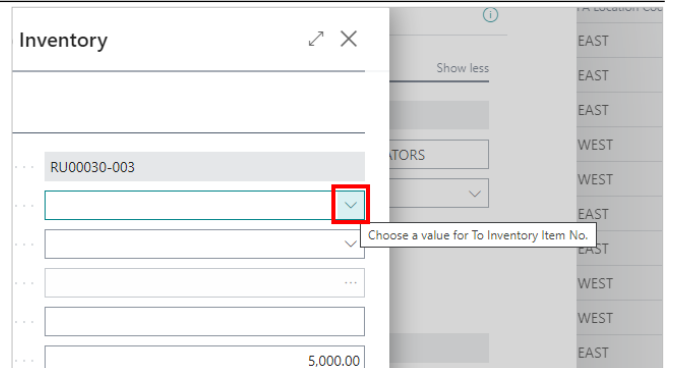
FA Subclass Code EQUIPMENT

FA Location Code EAST Blocked ...

Budgeted Asset Acquired ...

Serial No. Last Date Modified ...

Click on the lookup button **To Inventory Item No.**



Inventory

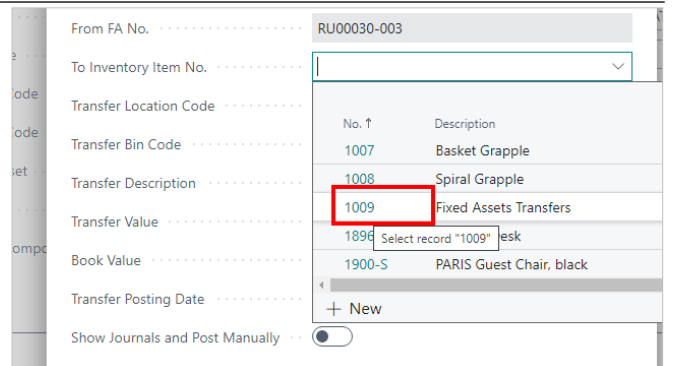
RU00030-003

To Inventory Item No.

Choose a value for To Inventory Item No.

Click on the link in cell **No.** with the value **1009**

Select the Item with Serial No. Item Tracking that the Fixed Asset is to be transferred to.



From FA No. RU00030-003

To Inventory Item No.

Transfer Location Code

Transfer Bin Code

Transfer Description

Transfer Value

Book Value

Transfer Posting Date

Show Journals and Post Manually

No. ↑ Description

1007 Basket Grapple

1008 Spiral Grapple

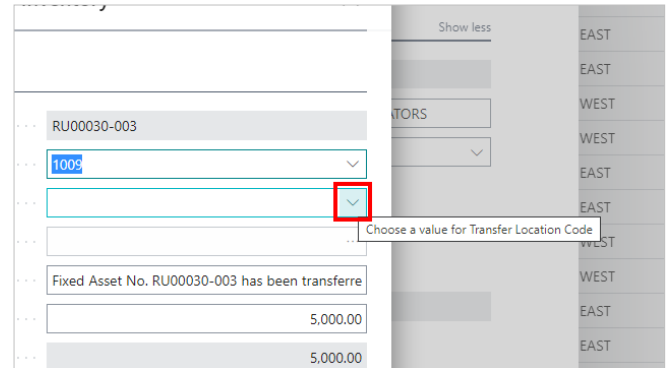
1009 Fixed Assets Transfers

1896 Select record "1009" desk

1900-S PARIS Guest Chair, black

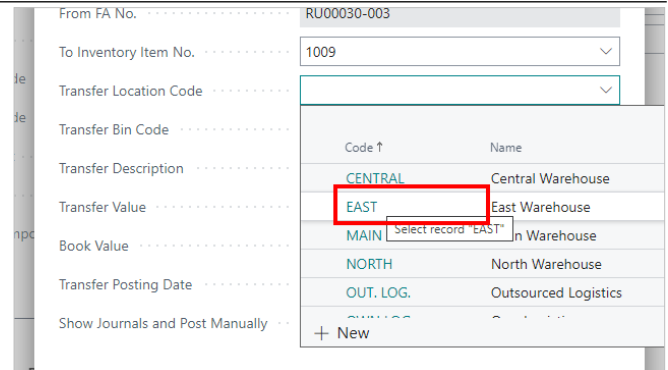
+ New

Click on the lookup button **Transfer Location Code**

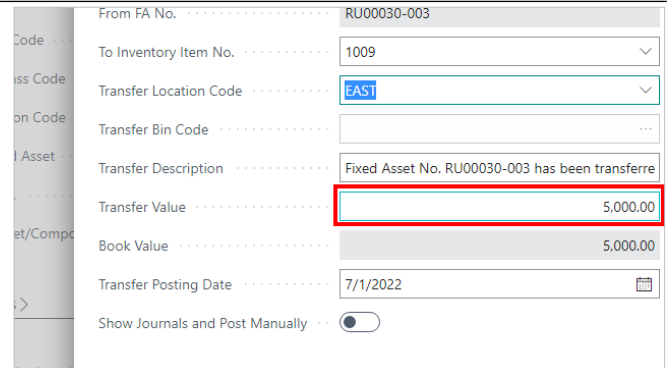


Click on the link in cell **Code** with the value **EAST**

Select the Location that the Item will be located in.

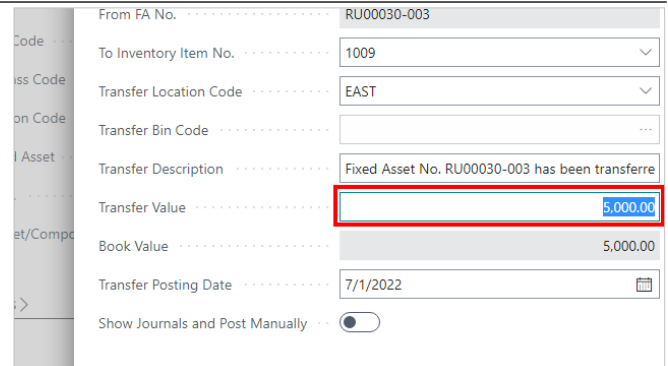


Click on the field **Transfer Value**



Enter the text **5500.00**.

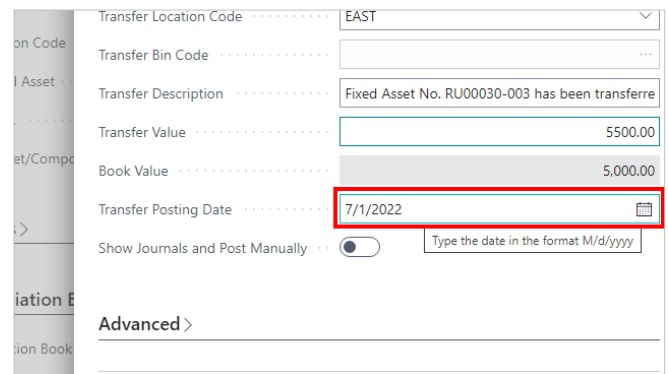
When the amount to be different than the Book Value, then the amount is to be entered in this field.



ODT Rentals Online Help

Click on the field **Transfer Posting Date**

The date defaults from the Users Work Date. If the transfer is to occur and be posted on a different date enter or look-up and select the applicable date.



Transfer Location Code EAST

Transfer Bin Code

Transfer Description Fixed Asset No. RU00030-003 has been transferre

Transfer Value 5500.00

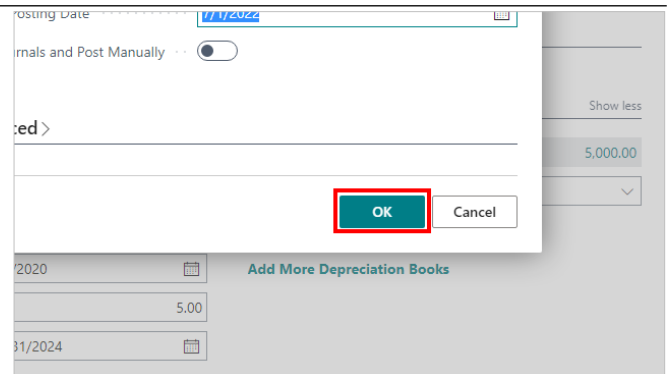
Book Value 5,000.00

Transfer Posting Date 7/1/2022

Show Journals and Post Manually .. ☐ Type the date in the format M/d/yyyy

Advanced >

Click on the button **OK**



Transfer Posting Date 7/1/2022

Show Journals and Post Manually .. ☐

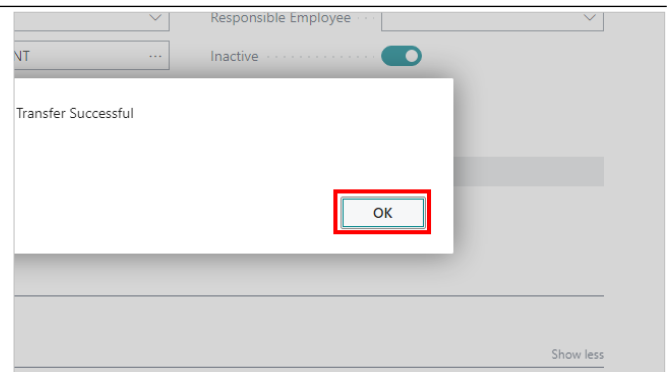
OK Cancel

2020 Add More Depreciation Books

5.00

31/2024

Click on the button **OK**



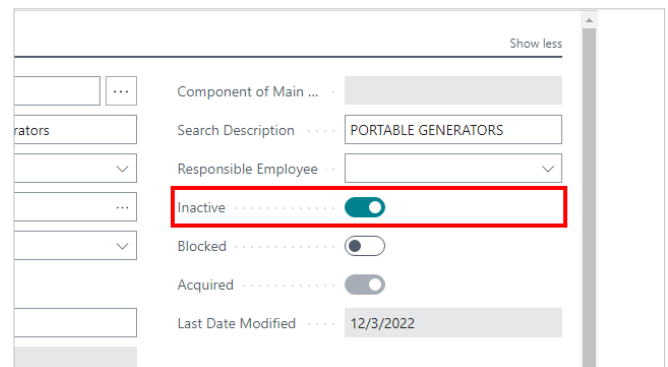
Transfer Successful

OK

The following covers a review of the Fixed Asset card and the entries from the Fixed Asset.

Click on **Inactive**

Note that the Inactive field has automatically enabled.



Component of Main ...

Search Description PORTABLE GENERATORS

Responsible Employee ..

Inactive ☒

Blocked ☐

Acquired ☐

Last Date Modified 12/3/2022



Click on the field **Book Value**

Note that the Book Value field on the FA card now displays 0.00.

The FA Ledger Entries will automatically be displayed when the Book Value amount is clicked on.

Book Value 0.00

Depreciation Table C...

Use Half-Year Conve...

Add More Depreciation Books

5.00

Click on the cell **FA Posting Type** with the value **Gain/Loss**

Note that using a Transfer Value of 5,500.00 for the Proceeds on Disposal resulted in a Gain of 500.00 being recorded in the FA Ledger Entries.

Posting Category	FA Posting Type	Description	Posting Date	Amount	Depart Code
	Acquisition ...	Portable Generators	1/1/2020	10,000.00	
	Depreciation	Depn to June 30-2022	6/30/2022	-5,000.00	
	Proceeds o...	Fixed Asset No. RU00030-003 has ...	7/1/2022	-5,500.00	
	Gain/Loss	Fixed Asset No. RU00030-003 has ...	7/1/2022	-500.00	
disposal	Acq Gain/Loss	Fixed Asset No. RU00030-003 has ...	7/1/2022	-10,000.00	
disposal	Depreciation	Fixed Asset No. RU00030-003 has ...	7/1/2022	5,000.00	

The following steps demonstrate viewing all the G/L Entries related to the posting of the FA G/L Journal and the Item Journal.

Click on the cell **FA Posting Category** with the value **Disposal**

No.	FA No.	Depreciation Book Code	FA Posting Category	FA Posting Type	Description
	RU00030-003	COMPANY		Acquisition ...	Portable Generators
TO 06-30-2022	RU00030-003	COMPANY		Depreciation	Depn to June 30-2022
\$RU00030-003	RU00030-003	COMPANY		Proceeds o...	Fixed Asset No. RU00030-003
\$RU00030-003	RU00030-003	COMPANY		Gain/Loss	Fixed Asset No. RU00030-003
\$RU00030-003	RU00030-003	COMPANY	Disposal	Acquisition ...	Fixed Asset No. RU00030-003
\$RU00030-003	RU00030-003	COMPANY	Disposal	Depreciation	Fixed Asset No. RU00030-003

Click on the navigation menu item **Find entries...**

Dynamics 365 Business Central

RU00030-003 · Portable Generators

FA Ledger Entries

Find entries...

Find entries and documents that exist for the document (Ctrl+Alt+Q)

FA Posting Date	Document Type	Document No.	FA No.	Depreciation Book Code
1/1/2020	Invoice	G05002	RU00030-003	COMPANY
6/30/2022		DEPN-3 TO 06-30-2022	RU00030-003	COMPANY
7/1/2022	Invoice	FATRANSRU00030-003	RU00030-003	COMPANY
7/1/2022	Invoice	FATRANSRU00030-003	RU00030-003	COMPANY



Click on the link in cell **No. of Entries** with the value **6**

		No. of Entries
		6
		1
		1
		4

G/L Entries related to the FA Transfer to Inventory

Posting Date	Docu... Type	Document No.	G/L Account No. 4	Description	Amount	Bal. Account Type	Bal. Account No.
7/1/2022	Invoice	FATRANSRU00030-003	61500	Fixed Asset No. RU00030-003 has be...	-5,000.00	G/L Account	
7/1/2022	Invoice	FATRANSRU00030-003	10900	Fixed Asset No. RU00030-003 has be...	5,000.00	G/L Account	
7/1/2022	Invoice	FATRANSRU00030-003	10800	Fixed Asset No. RU00030-003 has be...	-10,000.00	G/L Account	
7/1/2022		FATRANSRU00030-003	10700	Direct Cost on 07/01/22	-5,500.00	G/L Account	
7/1/2022		FATRANSRU00030-003	10700	Direct Cost on 07/01/22	5,500.00	G/L Account	
7/1/2022	Invoice	FATRANSRU00030-003	10700	Fixed Asset No. RU00030-003 has be...	5,500.00	Fixed Asset	RU00030-003

The Document No. created is used on both the FA G/L Journal and the Item Journal.

The Description created is only used on the entries created from the FA G/L Journal. The description contains the FA No. and the Item No. the asset is transferred to.

The full description on these entries for this example is:

Fixed Asset No. RU00030-003 has been transferred to Inventory Item No. 1009.

FA G/L Journal Entries

- G/L Account 61500 records the Gain on the disposal.
- G/L Account 10900 Accumulated Depreciation is debited for the depreciation posted up to the date of transfer.
- G/L Account 10800 Equipment has been credited for the acquisition cost.
- G/L Account 10700 Inventory for the third 10700 record is the debit for the proceeds on disposal from the Transfer Value amount, which is the unit cost for the specific serialized item.

G/L Entries from the Item Journal:

- G/L Account 10700 Inventory for the first record and second 10700 records are the standard Direct Cost credit and debit entries generated when posting the Item Journal.

To review the Item Ledger Entry and Value Entry, click on the quantity in the Find Entries page.

4.18.Rental Payment Services

4.18.1. Payment Service Overview

4.18.1.1. Overview

The Payment Services functionality for PayPal has been added to the Posted Rental Invoice page including the Change Payment Service menu option in the Home Menu and the Payment Service field on the Invoice Details tab.

NOTE:

The PayPal Payments Standard extension is provided by Microsoft, which is automatically installed.

The PayPal logo and link have been added to the Posted Rental Invoice report beneath the Tax Details on the report.

The Change Payment Service menu option and Payment Service field are only displayed on the Posted Rental Invoice page when the Payment Service has been enabled.

Should your organization currently be using the PayPal Payment Service for sales, then there is no additional

setup to be done for Rentals.

However, if your organization has had the Posted Rental Invoice customized, then the report may require modification as to where the PayPal logo and link are located.

If your organization is not currently using PayPal, then your organization will need to:

- Sign up for an account on PayPal. **NOTE:** Information related to your account is required when setting up the Payment Service for PayPal in Microsoft Dynamics Business Central.
- Setup the Payment Service for PayPal.

What occurs on PayPal once the Posted Rental Invoice has been sent to the Customer.

An email is sent to your customer that links to your invoice. They can review the invoice and choose to pay you online with their debit or credit card or using their PayPal Wallet. You'll get an email confirming that we've sent your invoices, and when you've been paid.

The processing by the Customer when they receive the email consists of:

- Clicking on the PayPal logo or link on the invoice to go to the payment service.
- Pays the invoice by selecting the preferred method of payment and completing the payment process.

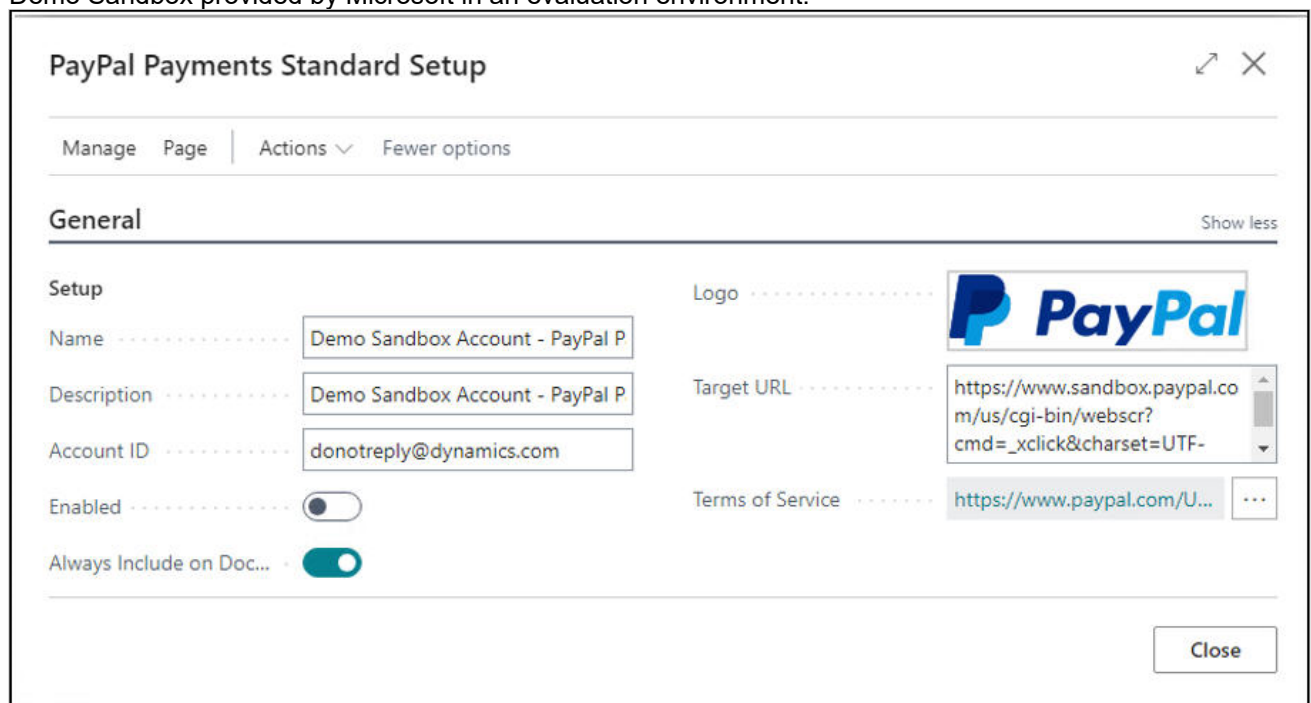
4.18.2. How to Setup the PayPal Payment Service

The following steps for adding a payment service have been copied from the Microsoft Dynamics Business Central help.

- Choose the Search icon, enter Payment Services, and then choose the related link.
- In the Payment Service page, choose the New action.
- Select the payment service, and then close the page.

- On the Payment Services page, choose the Setup action.
- Fill in the fields as necessary. Hover over a field caption to read a short description.
- Close the page.

The following picture displays the PayPal Payments Standard Setup page which is populated with data for a Demo Sandbox provided by Microsoft in an evaluation environment.



The following provides information on what is required for each field on the PayPal Payments Standard Setup



page.

- **Name:** Enter the name of your PayPal account that was setup.
- **Description:** Enter a description of what the PayPal account is being used for.
- **Account ID:** Enter the email address specified when setting up the PayPal account or the Merchant Account ID of the PayPal account.
- **Logo:** The PayPal Logo file from PayPal must be added here either by browsing to the file and selecting it or drag and drop the file into the popup that opens when the field is clicked on.
- **Target URL:** Enter the URL provided by PayPal when setting up the PayPal account.
- **Terms of Service:** The hyper link to the PayPal terms of service must be added to this field.
- **Enabled:** The Enable field on the page must be turned on for the Change Payment Service menu option and the Payment Service field on the Invoice Details tab to be displayed on the Posted Rental Invoice.
- **Always Include on Documents:** Currently this field does not apply to the Posted Rental Invoice. When turned on only applies to the Sales documents which populates the Payment Service field with this Payment Service option.

4.18.3. How to Process the Payment Service on a Posted Rental Invoice

The following are the steps to be taken on the Posted Rental Invoice for sending the invoice to the customer for payment using PayPal.

- Open the Posted Rental Invoice that you want the customer to pay by using the PayPal payment service.
- In the Payment Service field on the Invoice Details tab, choose the PayPal payment service and check the Available field.
- Send or Email the Posted Rental Invoice.

The following demonstrates the steps to be taken on a Posted Rental Invoice.

Click on **Invoice Details**

Invoice Discount Amount Excl. Tax
Total Excl. Tax (USD)
Invoice Details >
Shipping and Billing >
ODTRMSignatures >



ODT Rentals Online Help

Click on the link **Review** or **update the value for Payment Service**

...

ce is made available.

Department Code

Customergroup Code

Payment Discount %

Pmt. Discount Date

Direct Debit Mandate ID

Tax Liabl

Tax Area Code

Location Code

Click on **Available**

Line

ete Line

No.

Item Referen

No.

40100

40100

Excl. Tax

.....

Select Payment Service

Available

Name

→

☐

.....

Demo Sandbox Account - Pay

Click on the button **OK**

OK

Cancel

Payment Discount %

Pmt. Discount Date

Direct Debit Mandate ID

Click on the button **OK**

1 600.00 ATLANTA,GA SUPPLIES

1 600.00 ATLANTA,GA SUPPLIES

The payment service was successfully changed.

The invoice recipient will see the change when you send, or resend, the invoice.

OK

...

Department Code

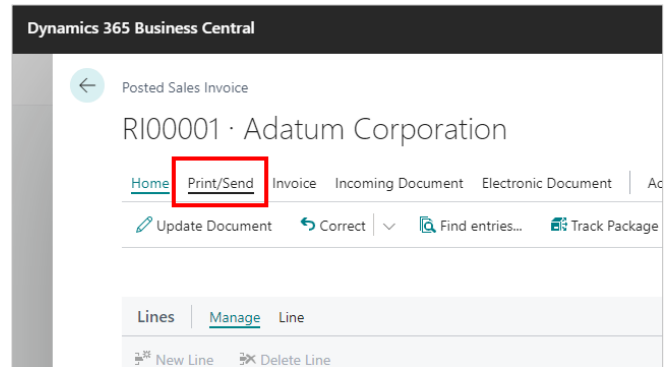
Customergroup Code

SALES

SMALL

Click on the navigation menu item popup **Print/Send**

Select Email or Send and complete the process.



4.19. Electronic Signatures

4.19.1. Rental Electronic Signatures

4.19.1.1. Rental Electronic Signatures Overview

4.19.1.1.1. Overview

ODT Rentals provides the capability to capture electronic signatures on rental documents, including Rental Quotes, Rental Contracts, Posted Rental Delivery, Posted Rental Returns, Advanced Proforma Invoice and Dispatch Delivery and Pickup Loads.

The Signature History can be viewed from Signature Setup, Rental Quotes, Rental Contracts, Posted Rental Delivery, Posted Rental Return, Advanced Proforma Invoice, Posted Rental Invoice, Delivery and Pickup Loads, and Posted Delivery and Pickup Loads.

The Signature Setup provides the ability for specifying a default signature clause and for configuring up to 8 signatures to be captured per rental document.

Individual signature clauses can be specified per each signature usage record setup.

When a default signature clause is configured, it is displayed for all persons signing the document when no individual signature usage records are specified.

When individual signature usage records are setup and an individual signature clause is specified for a specific signature usage record, then it is displayed when that signature is being captured.

For example, the setup for Rental Quotes could have a default signature clause and 2 signature records. One for the Sales Representative and one for the Customer.

On the customer record a signature clause specifically for customers could be specified. The Sales Rep. when signing would see the default signature clause and the customer would see the clause specified on the customer signature usage record.

If the Signature Setup is not configured, then by default, one signature can be captured per rental document.

Signatures can be captured via:

- Web client and if computer has a touch screen the user can use their finger, a stylus pen or a mouse. If the screen is not a touch screen, then the mouse must be used.
- Tablet using their finger or a stylus pen.
- iPhone using their finger or a stylus pen.

On Rental Management Setup, an option is provided for organizations utilizing the Advanced Proforma feature. The Transfer Signature On Adv. Proforma Post, field is for specifying whether the signatures on the Advanced Proforma are to flow to the Posted Invoice.

4.19.1.2. How to Setup Rental Electronic Signatures

4.19.1.2.1. Overview

The setup for signatures consists of the Signature Setup and Rental Management Setup.

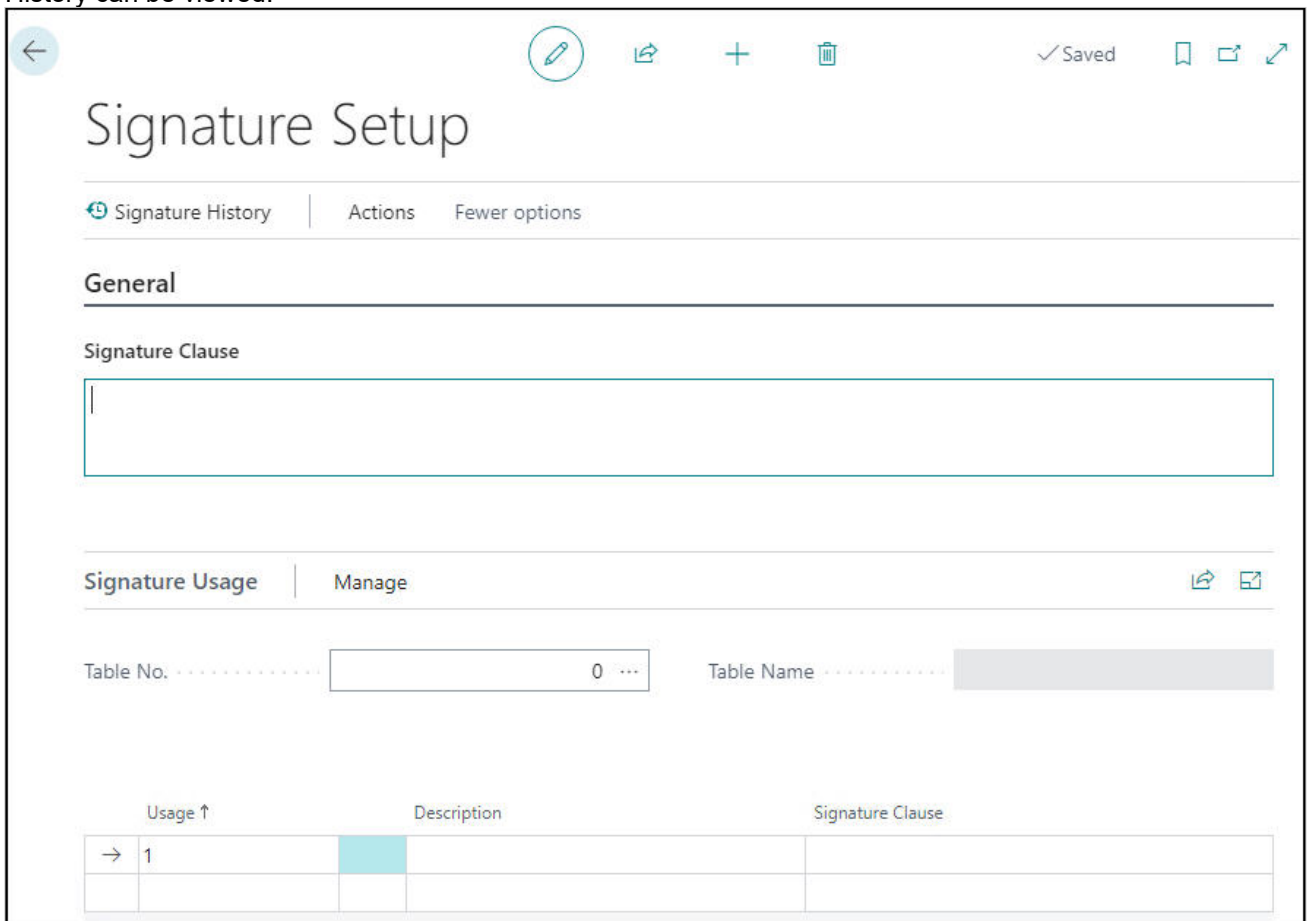
Rental Management Setup

On Rental Management Setup, General tab, the field Transfer Signature On Adv. Proforma Post is for specifying whether the signatures on the Advanced Proforma are to flow to the Posted Invoice.

This option would only be used by organizations using the Advanced Proforma feature.

Signature Setup

The following picture displays the Signature Setup page, where a default signature clause, the signatures required per rental document, and if applicable, individual signature clauses are setup and the Signature History can be viewed.



If the organization does not want a default signature clause, and only a single signature will be required on the documents, then no setup is required on the Signature Setup.

When only a generic signature clause is needed that would apply to all the persons signing the rental documents and only a single signature is required on the rental documents, then on the Signature Setup only the Signature Clause needs to be setup.

On the Signature Setup, the configuration of the Signature Usage records is required when multiple signatures are needed on a rental document. On each of the signature usage records, a signature clause specific to the signee can be recorded.

If a default signature clause is entered, and on the Signature Usage there are individual records for various signees that have a specific signature clause recorded on the line, then the clause recorded on the usage line will be displayed.

The default signature clause is only displayed for signees whose signature usage record does not have a



signature clause recorded.

- **Signature History Menu Option:** Displays a listing of the signatures captured on the rental documents.
- **Signature Clause:** A default signature clause defining what it means to sign the document electronically can be specified in this field. The default clause will be displayed on the signature pad when a specific signature usage clause is not defined.

Signature Usage:

The signature usage section is used for defining the signatures to be captured for specific rental documents and signature clauses related to those signatures, if applicable.

The signatures are related to the document header tables.
When a table has been specified, if there are multiple document types in the table, then instead of the Table Name being displayed Document Type will be displayed and the type must be selected.

Table No.: Look-up or enter the Table No. related to the document that the signature usage record is related to.

The following is a listing of the table names and numbers for the documents.

- **Rental Quote and Rental Contract:** Table No. 70014220 Rental Contract Header. The Document Type of Rental Quote or Rental Contract must be selected to specify which document the signature usage records will apply to.
- **Rental Delivery:** Table No. 70014222 Posted Rental Delivery
- **Rental Return:** Table 70014224 Posted Rental Return
- **Advanced Proforma Invoice:** Table 36 Sales Header. The Document Type of Invoice must be selected.
- **Dispatch Delivery and Pickup Loads:** Table 70014303 Dispatch Header. The Document Type of Delivery or Pickup must be selected to specify which document the signature usage records will apply to.

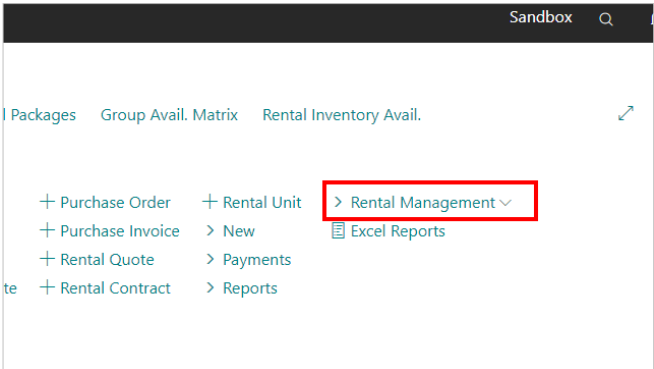
Description: Enter a description as to whom the signature is to be captured for. Examples: Customer, Sales Representative, Shipper, Receiver.

Signature Clause: This field is optional. If a specific signature clause is desired for the signature to be captured, then enter the clause. When entered, then the clause will be displayed on the signature pad.

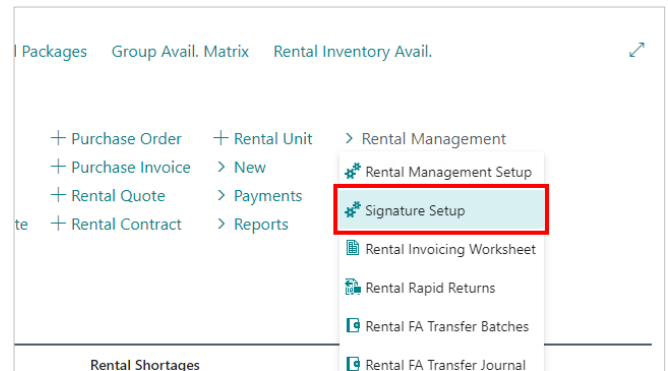
4.19.1.2.2. How to Setup a Default Signatures Clause

The following demonstrates configuring the Signature Setup with a default Signature Clause.

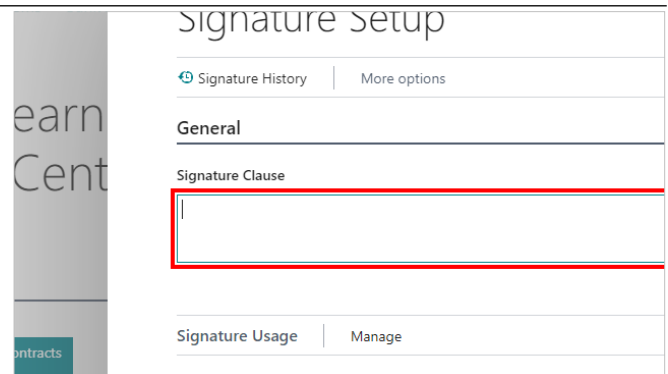
Click on the navigation menu item popup **Rental Management**



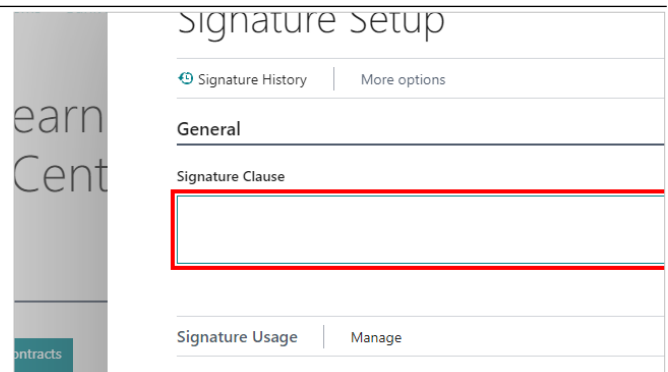
Click on the navigation menu item **Signature Setup**



Click on the textarea **Signature Clause**



Enter **The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign..**



4.19.1.2.3.

Documents

How to Setup Signature Usage for Multiple Signatures on

The following demonstrates the setup of 2 signature usage records to enable 2 signatures to be captured on a Rental Quote.

The setup steps are the same for a Rental Contract, except for selecting the Document Type.

Click on the field **Table No.**

Either enter the Table No. for Rental Quotes and Rental Contracts noted in the Overview, or look-up and select the Rental Contract Header table.





Click on the lookup button **Table No.**

gnatories hereto represent that they have been appropriately authorized to enter into this Agreement o
om they sign.

Signature Usage		Manage
No.	<input type="text" value="3"/>	Table Name
Usage ↑	Description	Signature Clause
1		

Click on the button **Search**

Signature Setup

Signature History More options

All Objects with Caption

Object Type ↑	Object ID ↑	Object Name
→ Table	3	Payment Terms
Table	4	Currency

Click on the field **Search All Objects with Caption**

Signature Setup

Signature History More options

All Objects with Caption

Object Type ↑	Object ID ↑	Object Name
→ Table	3	Payment Terms
Table	4	Currency
Table	5	Finance Charge Terms
Table	6	Customer Price Group

Enter the text **Rental**.

Signature Setup

Signature History More options

All Objects with Caption

Object Type ↑	Object ID ↑	Object Name
→ Table	3	Payment Terms
Table	4	Currency
Table	5	Finance Charge Terms
Table	6	Customer Price Group



ODT Rentals Online Help

Click on the cell **Object ID** with the value **70014220**

Table	70014203	ODT Rental Category
Table	70014214	ODT Rental Class
Table	70014215	ODT Rental Unit
Table	70014216	ODT Rental Usage UOM
Table	70014217	ODT Rental Line Rental Amount
Table	70014218	ODT Rental Sales Cue
Table	70014219	ODT My Rentals
Table	70014220	ODT Rental Contract Header
Table	70014221	ODT Rental Contract Line
Table	70014222	ODT Rental Delivery Header

Click on the button **OK**

Rental Line Rental Amount	ODT Rentals 365
Rental Sales Cue	ODT Rentals 365
My Rentals	ODT Rentals 365
Rental Contract Header	ODT Rentals 365
Rental Contract Line	ODT Rentals 365
Rental Delivery Header	ODT Rentals 365

OK

Cancel

Click on the field **Document Type**

By default Rental Quote is displayed.

The following shows the steps to use to view the list of Document Types.

I have been appropriately authorized to enter into this Agreement on behalf of the Party

70014220

Document Type

Rental Quote

Header

on

Signature Clause

Click on the lookup button **Document Type**

I have been appropriately authorized to enter into this Agreement on behalf of the Party

70014220

Document Type

Rental Quote

Header

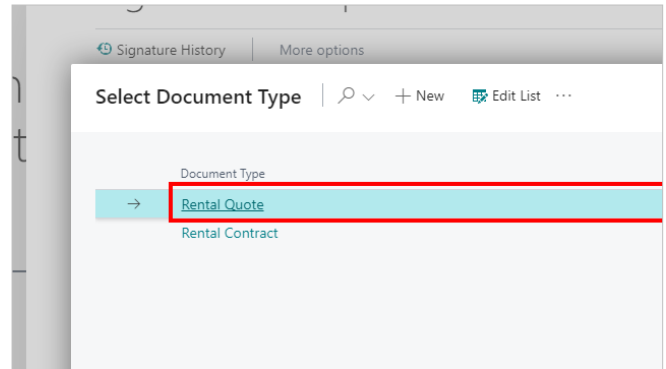
on

Signature Clause

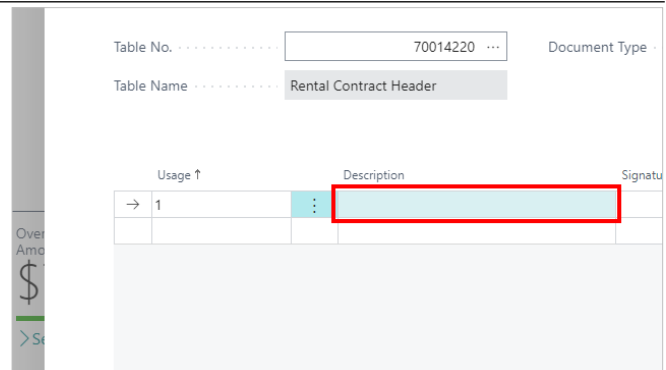
Review or update the value for Document Type

Click on the link in cell **Document Type** with the value **Rental Quote**

When setting up for Rental Contract signatures, then Rental Contract would be selected.

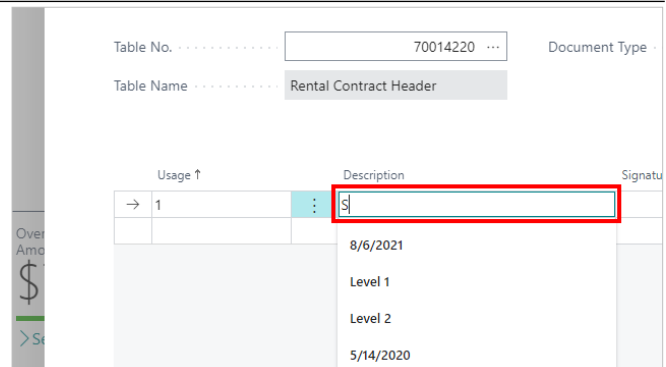


Click on the cell **Description**



Enter the text **Sales Representative**.

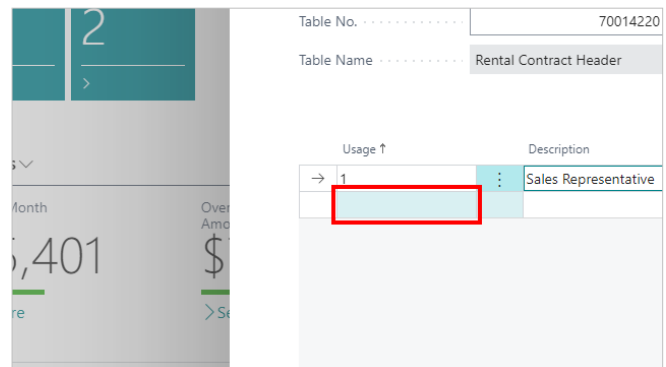
Enter a short description of whom the signature capture will apply to.
For example, Customer, Sales Representative or Salesperson.



The following demonstrates how to enter another signature usage record.

There can be a maximum of 8 signature usage setup, per each Table No., and if applicable, each Document Type.

Click on **Usage**





Click on the cell **Description**

Table No.	70014220 ...	Document Type ..
Table Name	Rental Contract Header	
Usage ↑	Description	Signature
1	Sales Representative	
→ 2		

Enter the text **Customer**.

Table No.	70014220 ...	Document Type ..
Table Name	Rental Contract Header	
Usage ↑	Description	Signature
1	Sales Representative	
→ 2		

Click on the cell **Signature Clause**

Should the organization have a specific signature clause related to Customer employees signing, then enter it here so that it will be displayed on the signature pad when capturing the signature.

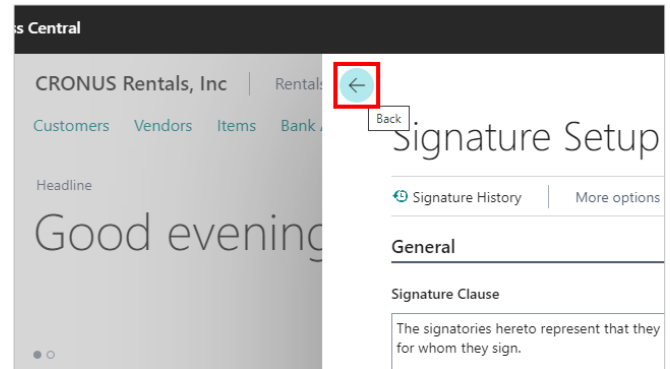
70014220 ...	Document Type	Rental Quote
Rental Contract Header		
Description	Signature Clause	
Sales Representative		
Customer		

Enter the text **The signee hereto represents that they have been appropriately authorized to enter into this Agreement on behalf of the Customer for whom they sign..**

70014220 ...	Document Type	Rental Quote
Rental Contract Header		
Description	Signature Clause	
Sales Representative		
Customer		

To setup for the other rental documents, repeat the above steps selecting the Table No. and Document Type, if applicable, as noted in the Overview.

Click on the back button



4.19.1.3. How to Capture Signatures

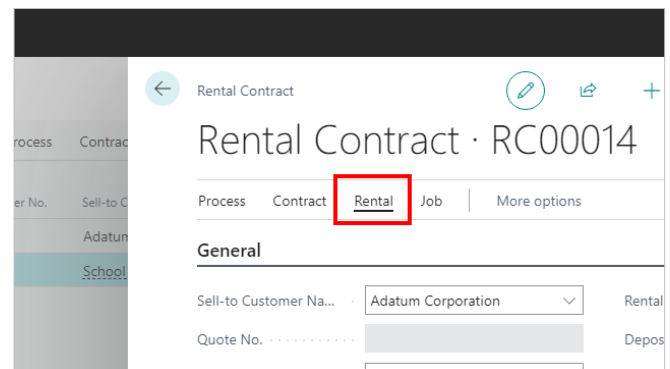
4.19.1.3.1. Capturing a Signature without Signature Usage Setup

The following demonstrates the capturing a single signature on a Posted Rental Delivery document, when on the Signature Setup a default Signature Clause has been setup, however, the Signature Usage has not been configured for the document.

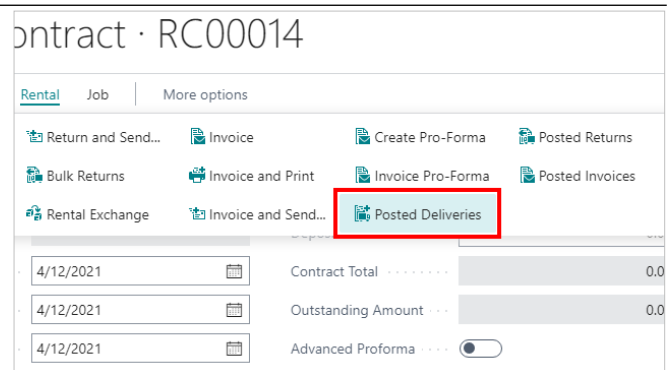
The Posted Rental Delivery document can be opened either from an open Rental Contract that the Rental Units were shipped on, or from the Posted Rental Deliveries list from the Rentals main menu.

The capture of the signature can be done from either the Document Signatures tab or the Document Signatures fact box on the document. In this example, the signature will be captured from the Document Signatures tab.

Click on the navigation menu item popup **Rental**

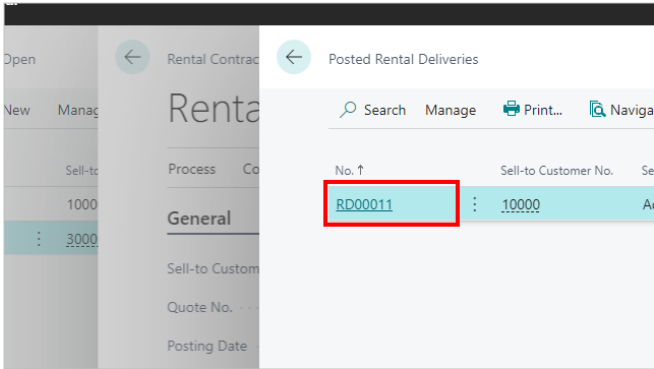


Click on the navigation menu item **Posted Deliveries**

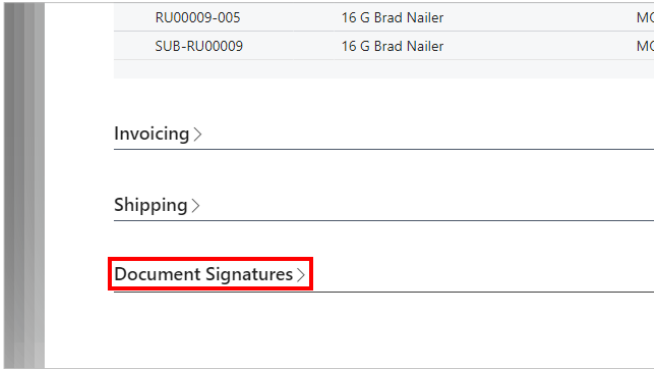




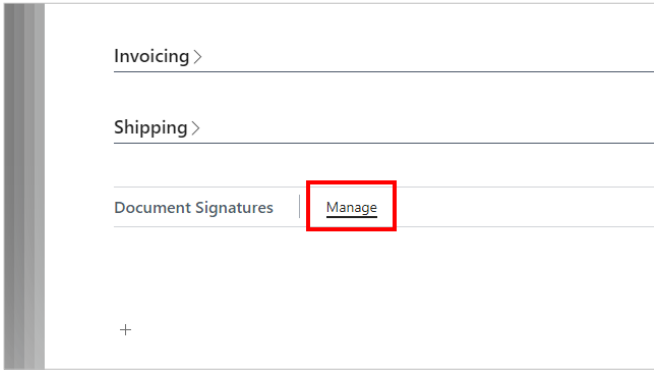
Click on the link in cell **No.** with the value **RD00011**



Click on **Document Signatures**



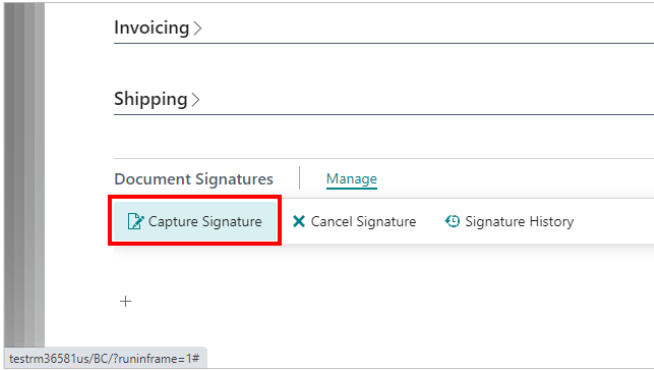
Click on the navigation menu item popup **Manage**



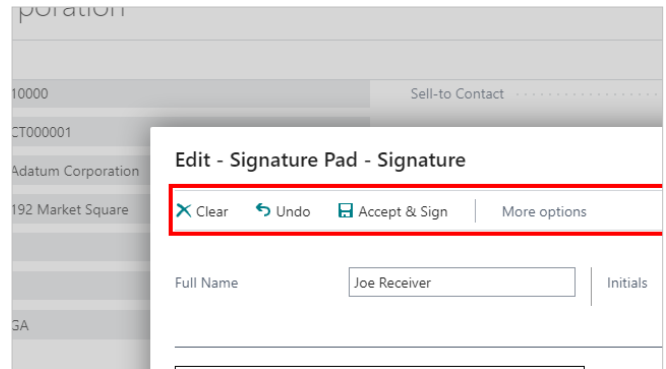
The Manage menu contains 3 sub-menu options:

- **Capture Signature:** When selected a Signature Pad will open for the input of the signees name, initials and signature.
- **Cancel Signature:** Which can be used to cancel the signature, if needed.
- **Signature History:** Which will display a list of the signatures attached to the document and any canceled signatures. This menu options are also available on the Document Signatures fact box.

Click on the navigation menu item **Capture Signature**



Click on **Clear Undo Accept & Sign More options** ☐

The signature pad contains the following menu options:

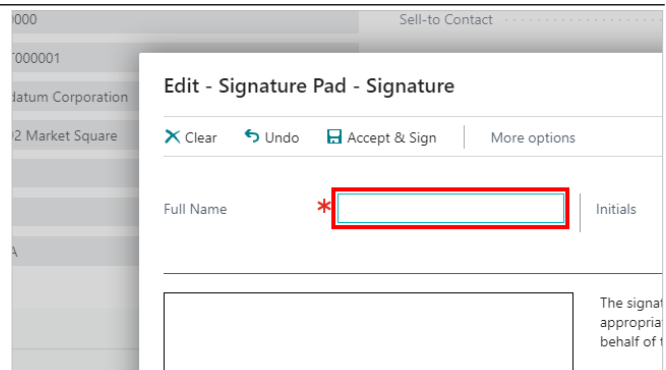
- Clear, which will totally clear the signing area.
- Undo, which will clear only the last continuous signature stroke.
- Accept & Sign, will save the signature to the document.

Click on **The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.**

Note that the default Signature Clause is displayed on the signature pad.

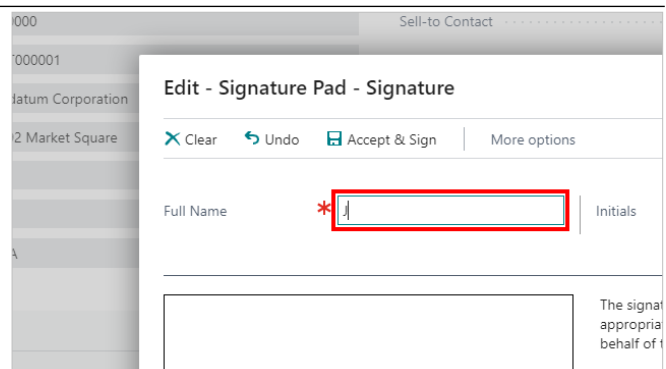


Click on the field **Full Name**



Enter **Full Name**.

Enter the Name of the person who is to sign the document.



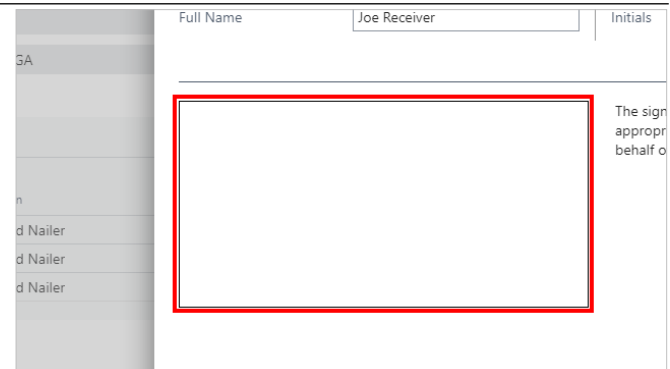
Click on the field **Initials**

Enter the Initials of the person who is to sign the document.



Click on

The person whom is to sign the document is to sign it in this box using one of the methods noted in the Rental Electronic Signatures Overview help and depends the device being used.

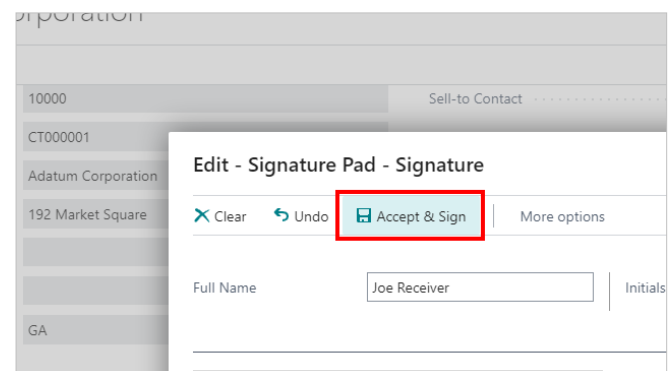


Once the person has signed the document, then the Accept & Sign menu option must be selected.

NOTE:

If the Close button on the Signature Pad is clicked on, the data and signature on the Signature Pad will not be saved.

Click on the navigation menu item **Accept & Sign**



Once the Accept & Sign has been selected the page will close and the signature will be displayed on the document on the Document Signatures tab and the Document Signatures fact box as displayed below.





Click on **Signature Signed by Joe Receiver on 03/19/22 at 4:36:44 PM.**

Rental Time	Requested Delivery Date
12:00:00 AM	4/12/2021
12:00:00 AM	4/12/2021
12:00:00 AM	4/12/2021

Click on the link **Document Signatures**

Line	Return Day	Depart...	Custom...
Disco...	%	Code	Code
0	<input checked="" type="checkbox"/>	SALES	SMALL
0	<input checked="" type="checkbox"/>	SALES	SMALL
0	<input checked="" type="checkbox"/>	SALES	SMALL
0	<input checked="" type="checkbox"/>	SALES	SMALL

When the Posted Rental Delivery document is printed, emailed or sent the signature and signature information will print on the document.

Click on the navigation menu item popup **Process**

No.	Sell-to Customer No.
RD00011	10000

Click on the navigation menu item **Print...**

No.	Sell-to Customer No.	Sell-to Contact No.
RD00011	10000	CT000001

The following picture of the Posted Rental Delivery document displays the signature and the information on the document.



RENTAL DELIVERY

Page: 1
Rental Delivery No.: RD00011
Rental Delivery Date: 4/12/2021


Sell To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

Customer ID 10000
Ship Via
Ship Method
Ship Date 4/12/2021

Ship To: Adatum Corporation
Robert Townes
192 Market Square
GA 31772

P.O. Number
P.O. Date 4/12/2021
Rental Contract No. RC00014
Salesperson Jim Olive

Unit No.	Description	Serial No.	Location/Bin	Quantity	UOM	Start Date	Expected Return Date
RU00009-004	16 G Brad Nailer	16BN-004	WEST	1		4/12/2021	5/11/2021
RU00009-005	16 G Brad Nailer	16BN-005	WEST	1		4/12/2021	5/11/2021
SUB-RU00009	16 G Brad Nailer		WEST	1		4/12/2021	5/11/2021

Signature


Signed by Joe Receiver on 03/19/22 at 4:36:44 PM.

4.19.1.3.2. Capturing a Signature with Signature Usage Records Defined

The following demonstrates the signing of a Rental Contract from the fact box on the contract, which has Signature Usage records setup for the:

- Sales Representative, which does not have a specific signature clause defined. Therefore the default signature clause will be displayed on the signature pad.
- Customer, which does have a specific signature clause defined and therefore will be displayed in on the signature pad.

Click on the link **Document Signatures**

Rental Unit Price	Alt1 Rental Unit Price	Alt2 Rental Unit Price
150.00	0.00	0.00
150.00	0.00	0.00
150.00	0.00	0.00
150.00	0.00	0.00

Certificate or insurance

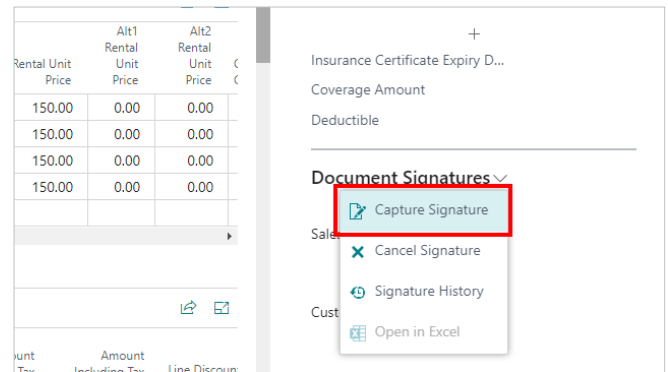
+
Insurance Certificate Expiry D...
Coverage Amount
Deductible

Document Signatures

Actions for Document Signature

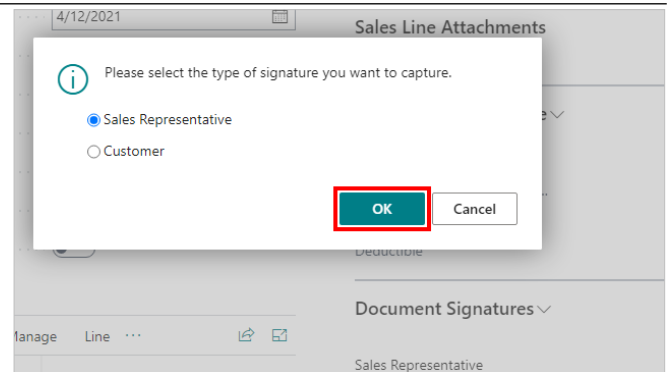
Sales Representative
+
Customer
+

Click on the menu item **Capture Signature**



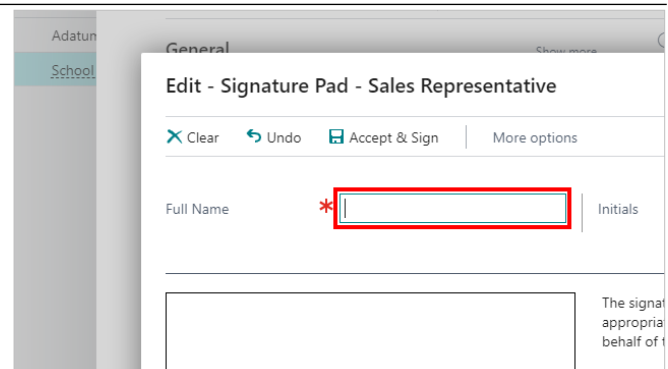
The screenshot shows a 'Document Signatures' dropdown menu. The 'Capture Signature' option is highlighted with a red box. Other options include 'Cancel Signature', 'Signature History', and 'Open in Excel'.

Click on the button **OK**



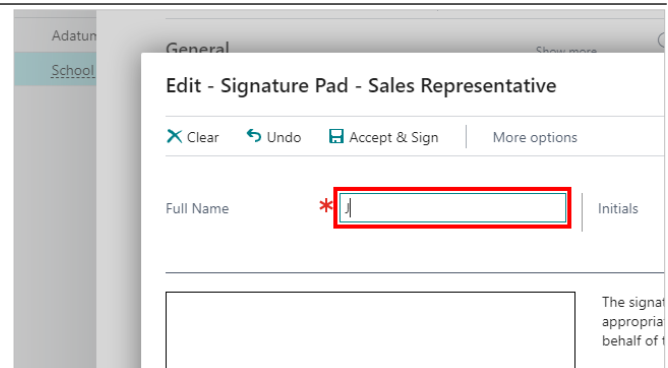
The screenshot shows a 'Sales Line Attachments' dialog box. A message box prompts the user to 'Please select the type of signature you want to capture.' with two radio buttons: 'Sales Representative' (selected) and 'Customer'. The 'OK' button is highlighted with a red box.

Click on the field **Full Name**



The screenshot shows the 'Edit - Signature Pad - Sales Representative' form. The 'Full Name' field is highlighted with a red box. The form includes buttons for 'Clear', 'Undo', 'Accept & Sign', and 'More options'.

Enter the text **Jim Olive**.



The screenshot shows the 'Edit - Signature Pad - Sales Representative' form. The 'Full Name' field is highlighted with a red box. The form includes buttons for 'Clear', 'Undo', 'Accept & Sign', and 'More options'.



Click on the field **Initials**

representative

More options

Initials *

The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.

Enter the text **JO**.

representative

More options

Initials *

The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.

Click on

The Sales Representative whom is to sign the document is to sign it in this box using one of the methods noted in the Rental Electronic Signatures Overview help and depends the device being used.

The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.

Click on **The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.**

Note that the default Signature Clause is displayed on the signature pad as the Signature Usage record for the Sales Representative did not have a signature clause specified on the record.

More options

Initials JO

The signatories hereto represent that they have been appropriately authorized to enter into this Agreement on behalf of the Party for whom they sign.



Click on the navigation menu item **Accept & Sign**

Process Contract Rental Job More options

General

Edit - Signature Pad - Sales Representative

Clear Undo Accept & Sign More options

Full Name Jim Olive Initials

Click on the link **Document Signatures**

Return Day Billable Depart... Code Customer... Code

<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL

Certificate of insurance

Insurance Certificate Expiry D...

Coverage Amount

Deductible

Document Signatures

Sales Representative

Jim Olive

Click on the menu item **Capture Signature**

Return Day Billable Depart... Code Customer... Code

<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL
<input checked="" type="checkbox"/>	SALES	SMALL

Capture Signature

Cancel Signature

Signature History

Open in Excel

Click on the field **Customer**

Outstanding Amount

Advanced Proforma

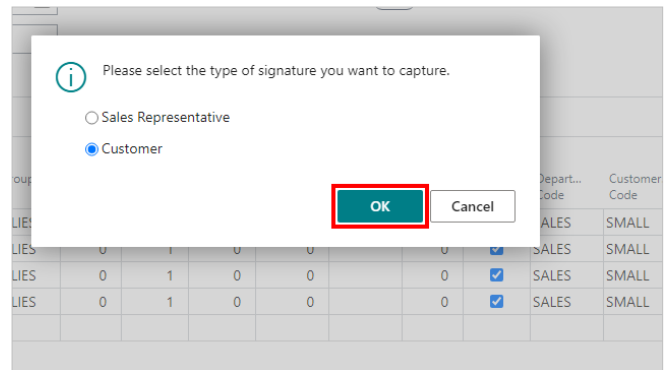
Please select the type of signature you want to capture

☒ Sales Representative

☐ Customer

OK

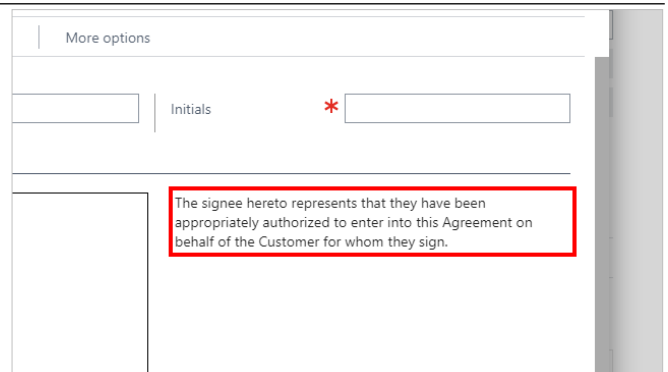
Click on the button **OK**



	Sales	Small
SALES	0	1
SALES	0	1
SALES	0	1

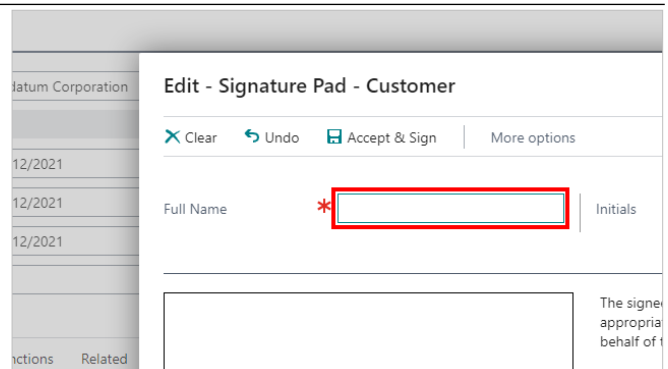
Click on **The signee hereto represents that they have been appropriately authorized to enter into this Agreement on behalf of the Customer for whom they sign.**

As the Signature Usage record for Customer has a specific signature clause for customer signees, it is displayed on the Signature Pad.



	Sales	Small
SALES	0	1
SALES	0	1
SALES	0	1

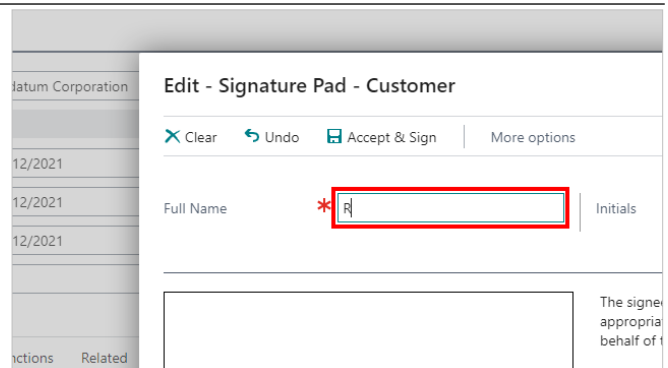
Click on the field **Full Name**



	Sales	Small
SALES	0	1
SALES	0	1
SALES	0	1

Enter the text **Robert Townes**.

Enter the name of the person signing the document on behalf of the Customer on the contract.



	Sales	Small
SALES	0	1
SALES	0	1
SALES	0	1

Click on the field **Initials**



The screenshot shows a web form with a 'More options' dropdown menu. The 'Initials' field is highlighted with a red box. Below the form, there is a disclaimer: 'The signee hereto represents that they have been appropriately authorized to enter into this Agreement on behalf of the Customer for whom they sign.'

Enter the text **RT**.



The screenshot shows the same web form as before, but now the 'Initials' field contains the text 'RT' and is highlighted with a red box. The disclaimer remains the same.

Click on

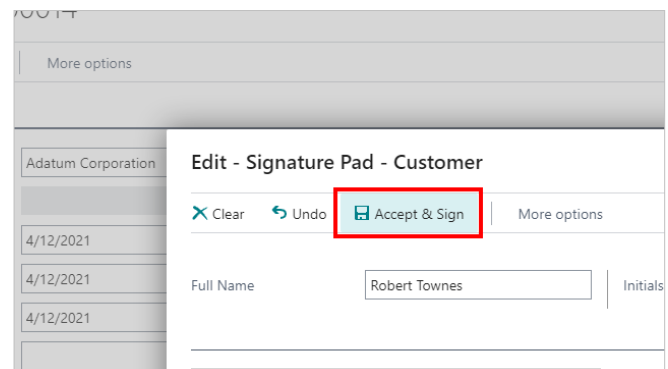
The person whom is to sign the document on behalf of the Customer is to sign it in this box using one of the methods noted in the Rental Electronic Signatures Overview help and depends the device being used.



The screenshot shows a large red rectangular box intended for a signature. To the right of the box, there is a disclaimer: 'The signatories appropriately authorized to enter into this Agreement on behalf of the Customer for whom they sign.'

Have the Customer sign in this box.

Click on the navigation menu item **Accept & Sign**




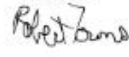
The screenshot shows a 'Edit - Signature Pad - Customer' window. The 'Accept & Sign' button is highlighted with a red box. Below the button, there are fields for 'Full Name' (Robert Townes) and 'Initials'.

When the Rental Contract is printed, emailed or sent, the signatures will be included on the document. The following picture displays the signatures on the Rental Contract.



CRONUS Rentals, Inc 7122 South Ashford Street Westminster Atlanta, GA 31772		Rental Contract	
		Page: 1	
		Rental Contract Number:	RC00014
		Rental Contract Date:	4/12/2021
Sell	Ship	P.O. Number	
To: Adatum Corporation	To: Adatum Corporation	Customer ID	10000
Robert Townes	Robert Townes	SalesPerson	Jim Olive
192 Market Square	192 Market Square		
, GA 31772	, GA 31772	Ship Via	
		Ship Method	
		Terms	1 Month/2% 8 days

No.	Description	Unit	Quantity	Unit Price	Total Price
Rental Charges:					
RU00009	16 G Brad Nailers Group		3		
RU00009-004	16 G Brad Nailer	168N-004	1		150.00
Rental	Apr 12, 2021 to May 11, 2021		1 @ 150.00/ Monthly Rental = 150.00		
RU00009-005	16 G Brad Nailer	168N-005	1		150.00
Rental	Apr 12, 2021 to May 11, 2021		1 @ 150.00/ Monthly Rental = 150.00		
SUB-RU00009	16 G Brad Nailer		1		150.00
Rental	Apr 12, 2021 to May 11, 2021		1 @ 150.00/ Monthly Rental = 150.00		

Sales Representative	Customer
	
Signed by Jim Olive on 03/19/22 at 6:03:30 PM.	Signed by Robert Townes on 03/19/22 at 8:00:29 PM.

4.19.2. Remote E-Signature Capture

4.19.2.1. Remote Signatures Overview

4.19.2.1.1. Overview

ODT Rentals provides remote signature capture functionality for the Rental Quote and Rental Contract that includes the ability to automatically save the signed documents to an online drive. The online drives currently supported are OneDrive and SharePoint.

Currently the feature supports the remote signature capture using DocuSign.

IMPORTANT:

The setup and configuration of the Remote Signature Capture functionality is complex and should only be attempted by knowledgeable personnel with administrative access on an organizations' network, Business Central, and OneDrive or SharePoint. Assistance is available from Opendoor.

4.19.2.1.2. Planning for using DocuSign for Remote E-Signatures.

Decide whether you want to save the signed documents to OneDrive or SharePoint.

NOTE:

It is recommended that SharePoint be used as the site is shared with other users and can be managed by your IT Team. Whereas if selecting to use OneDrive it will be the drive of the individual who sets up DocuSign, which could pose a problem if the individual leaves the company.



Determine the folder structure for the filing of the signed documents. This information is needed when setting up DocuSign.

Determine which individual(s) will be completing the required setups including DocuSign, SharePoint or OneDrive, and the External Connectors for DocuSign and the Online Drive, and the Online Drive folder mapping in ODT Rentals.

Whether you are using SharePoint or OneDrive, it is advisable to create a dedicated service account to configure the integration

If you use an individuals' account, the integration may stop working if such accounts get blocked/deleted (i.e., when the individual leaves the organization)

NOTE: The dedicated service account must have the appropriate security permissions and access to:

- Entra ID (aka Azure AD) portal to create and configure the Entra ID App Registration.
- Setup the online folders and assign the appropriate permissions on the folders on SharePoint or OneDrive for the users to open the document from the link on the Rental Quote or Rental Contract.
- Business Central for configuring the External Connectors and Online Drive mapping.

Determine if the Rental Quote and/or Rental Contract reports being used have been customized. If so, the report will need to be modified for the DocuSign feature. Please contact Opendoor Support for assistance with this.

Decide whether the request for the remote signature is to be sent to the Customer email address or the Customer Contract email address.

4.19.2.2. Remote Signature Setup Overview

4.19.2.2.1. Overview

The setups consist of:

- OneDrive or SharePoint site and folder(s) and Permissions.
- DocuSign Accounts.
- Create and configure an Entra App Registration on Entra ID.
- Create an External Connector for DocuSign with the E-Signature Setting and the connector for the online drive to be used in Business Central.
- Verify and update if required, the Customer or Contact email address depending on the setup on the External Connector for DocuSign, E-Signature Settings page, Send to Email Type field.
- Configure Rental Management Setup, E-Signature tab.

IMPORTANT NOTES

We highly recommend using SharePoint, as SharePoint site is designed to be shared and collaborative between users. OneDrive is an individual storage, and it requires extra configurations to share the storage out for other users to access.

The account used to log into the OneDrive App will be the individuals drive that the files are saved to. Appropriate permissions must be assigned to the folders to where the files will be saved to for the users who will require the ability to view the documents from the Rental Quote and Rental Contract.

Whether you are using SharePoint or OneDrive, it is advisable to create a dedicated service account to configure the integration.

If you use an individuals' account, then the integration may stop working if such accounts get blocked/deleted (i.e., when the individual leaves the organization).

4.19.2.2.2. Setup OneDrive or SharePoint folder(s) and Permissions

Setup the folder and sub-folder(s), as applicable, for SharePoint or OneDrive where the signed documents are to be saved to.

If going to use SharePoint:

- Log in into SharePoint using your Azure account.
- On your organizations' SharePoint site select or create a site to be used.
- Under the root folder, Documents, add the folder and sub-folder(s), if applicable, for where the signed documents will be saved to. The folder path where the files are to be saved to will be needed when completing the setup in DocuSign and when setting up the External Connector, ONLINE DRIVE.
- Assign the appropriate permissions for users who would need to be able to view the signed documents from the Rental Quote or Rental Contract.

SharePoint Folder Structure example: Documents/Business Central/ Signature Archived/

If going to use OneDrive:

- Log in into OneDrive using your Azure account. This must be the user who will be setting up the DocuSign Account.
- On the OneDrive under the root drive OneDrive, add the folder and sub-folder(s), if applicable, for where the signed documents will be saved to. The folder path where the files are to be saved to will be needed when completing the setup in DocuSign and when setting up the External Connector, ONLINE DRIVE.
- Assign the appropriate permissions for users who would need to be able to view the signed documents from the Rental Quote or Rental Contract.

Folder Structure example: OneDrive/Business Central/CRONUS USA Inc./Signature Archived/

4.19.2.3. How to Setup DocuSign for Remote Signatures

4.19.2.3.1. Overview

IMPORTANT

DocuSign does not allow creating and testing any integration in the main production environment. Instead, you will have to register for a Developer (Demo) account with them. You then use the Developer account to create, configure and test the integration.

Once the testing is completed, you will then follow the "go-live" process to move the integration to your DocuSign production account.

References:

- How to register a DocuSign Developer account: <https://developers.docusign.com/platform/account/>
- How to start the go-live process to copy integration from DocuSign Developer account to the Production account: <https://developers.docusign.com/platform/go-live/>

NOTE:

To test, the email addresses of the Customers or Contacts to be used in testing, based on selection in setting up the External Connector, must be changed to the email address of a tester prior to testing in the sandbox so the actual customers/contacts do not get an email for signing.

Once it is confirmed that the DocuSign is functioning correctly, then create the DocuSign Admin Account and Developer Account in DocuSign and complete the setups in DocuSign and the other setups for the live production environment.

4.19.2.3.2.**How to Setup DocuSign**

The following covers the integration setup in a DocuSign Demo/Developer account. If you do not have such account, please follow this article to create one:

<https://developers.docusign.com/platform/account/>

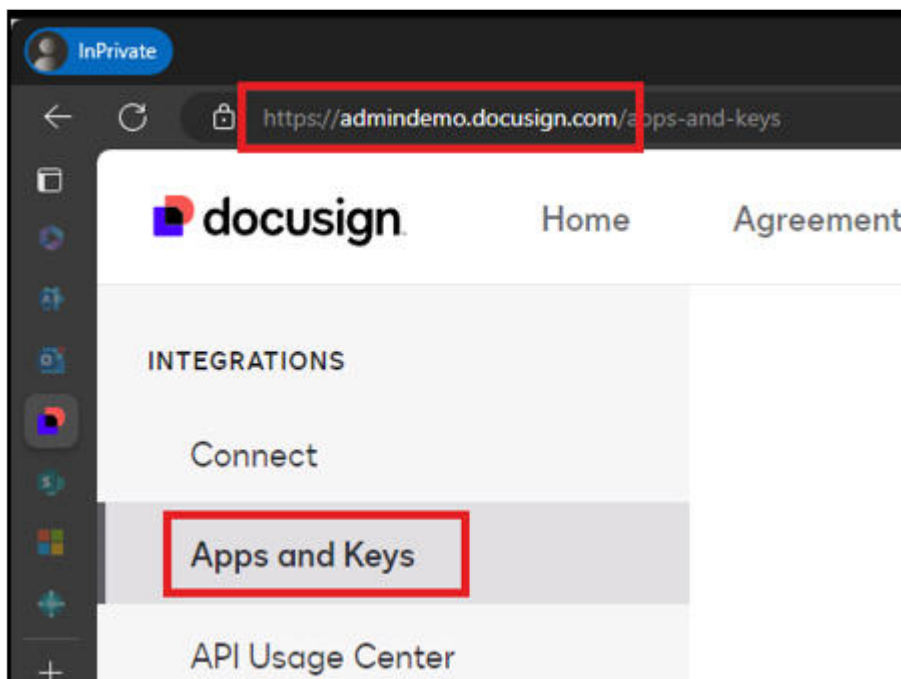
Once you have the Developer account registered, login to the following site to access the Demo environment's admin page:

<https://admindemo.docusign.com/>

4.19.2.3.2.1.**Create an Integration App**

An Integration App is needed to integrate DocuSign with ODT Rentals.

- In the DocuSign Admin portal, go to **Apps and Keys** page (under Integrations section).



- In the **Apps and Keys** page, click on **Add App and Integration Key** button, which opens the window Add Integration Key.

Apps and Keys

When building a DocuSign integration, you must first create an app and integration key. This key is required to call any DocuSign API, either directly or by using an SDK.

Create apps and keys manually or edit keys created automatically for you by [Quickstart](#).

^ My Account Information

User ID	API Account ID	Account Base URI
950bCd00... 	fd000974... 	https://demo.docusign.net 

Apps and Integration Keys

[Add App and Integration Key](#)

- Enter an App Name. For example, ODT Rentals for Business Central. Select CREATE APP, which creates the Integration App.

Add Integration Key

App Name *

ODT Rentals for Business Central

Create App Cancel

NOTE: Copy and save the **Integration Key** of the app, as this will be needed when setting up the ODT Rentals External Connector for DocuSign in Business Central (for the **Application/Client ID** field).

Apps and Keys > ODT Rentals for Business C...

ODT Rentals for Business Central


Edit your application name, choose an authentication method, and configure additional settings.

General Info

App Name *

ODT Rentals for Business Central

Integration Key

e1e5028a-t... 1a75bc41 

4.19.2.3.2.2.


Configure the Integration App

Authentication

- User Application: Select Yes.

Authentication

Not sure which settings to use? [Learn more](#)

 **User Application**

Is your application able to securely store a client secret?

☒ Yes

☐ No

- Select **Add Secret Key** to create a Secret Key.

NOTE:

Copy and save the Secret Key as it will be needed when setting up the External Connector for DocuSign in Business Central. The Secret Key is to be entered in the **Client Secret** field on the External Connector.

Authentication Method for your App**Authorization Code Grant**

Used for integrations where each user logs in individually and requires a one-time consent for the app to use their account.

☐ **Require Proof Key for Code Exchange (PKCE)** **RECOMMENDED**

Requires all requests to include a code verifier and code challenge, which protects your app against malicious attacks.

Secret Keys

+ Add Secret Key

- Add the following **Redirect URIs**:
<http://localhost/>
<https://businesscentral.dynamics.com/OAuthLanding.htm>
<https://businesscentral.dynamics.com/OAuthLanding.htm/>

NOTE: The following URI will be needed when setting up the External Connector to DocuSign in Business Central. <https://businesscentral.dynamics.com/OAuthLanding.htm>

Additional settings**Redirect URIs**

✕ <http://localhost/>

✕ <https://businesscentral.dynamics.com/OAuthLanding.htm>

✕ <https://businesscentral.dynamics.com/OAuthLanding.htm/>

+ Add URI

Link to Privacy Policy

<http://www.example.com/privacy>

- Add his Origin URL: <https://businesscentral.dynamics.com>

CORS Configuration

To enable API calls from a browser via CORS, add at least one origin URL below. For more information see [CORS Overview](#).

Origin URLs

List of origin URLs where CORS will be allowed. Maximum of 20 origins allowed.

X

+ Add Origin URL

- In the **Allowed HTTP Methods**, tick all options: GET, POST, PUT, DELETE and HEAD.
- Finally, click the **Save** button.

Allowed HTTP Methods

HTTP methods your app is allowed to use when making CORS calls

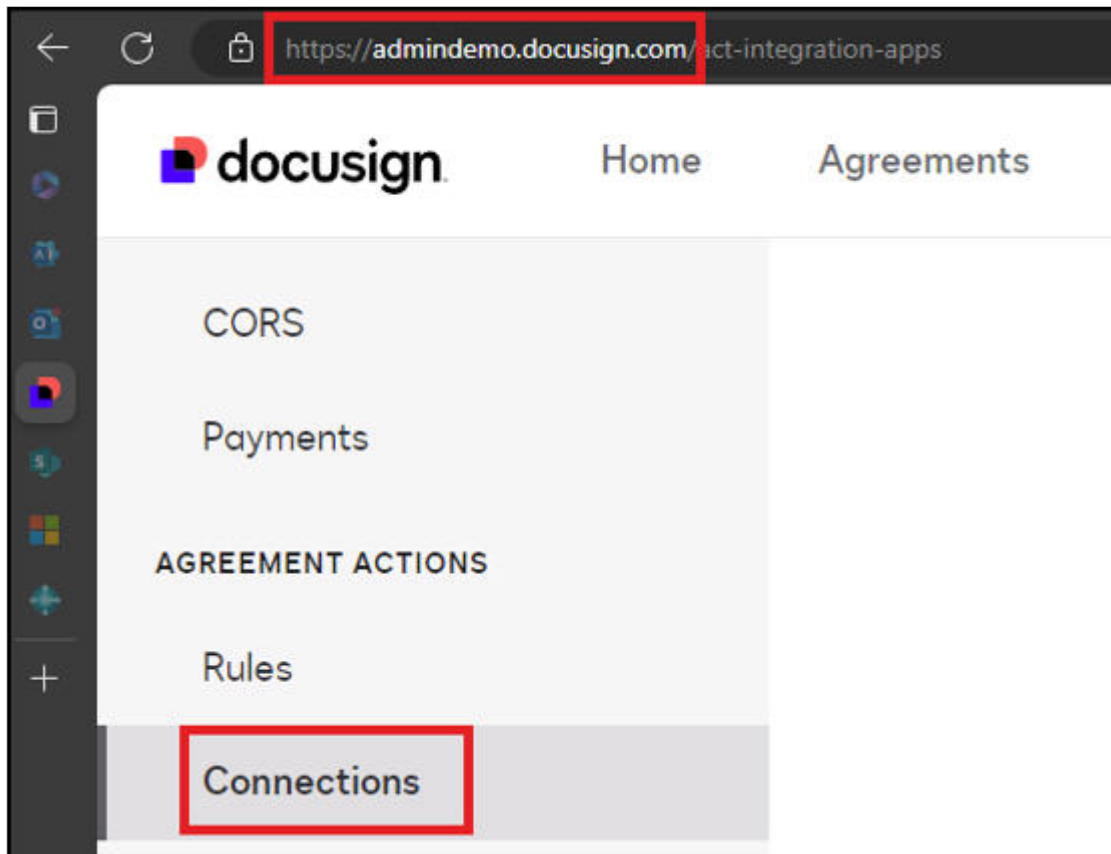
☒ GET ☒ POST ☒ PUT ☒ DELETE ☒ HEAD

Save

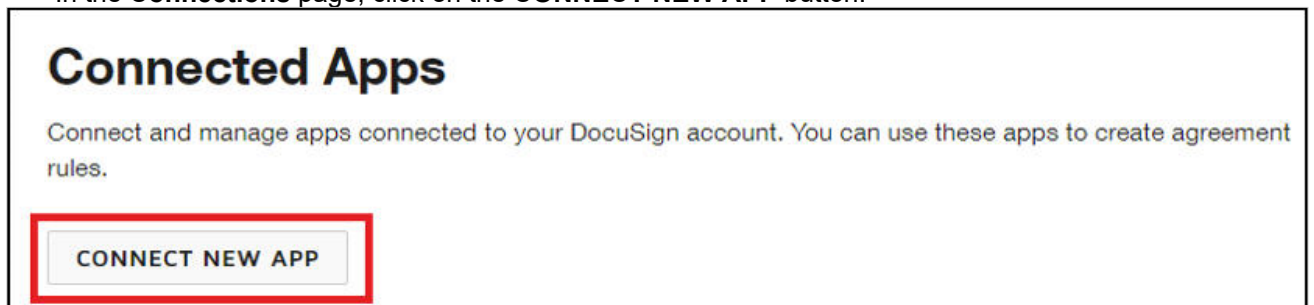
4.19.2.3.2.3. documents

Connect DocuSign to SharePoint or OneDrive to store

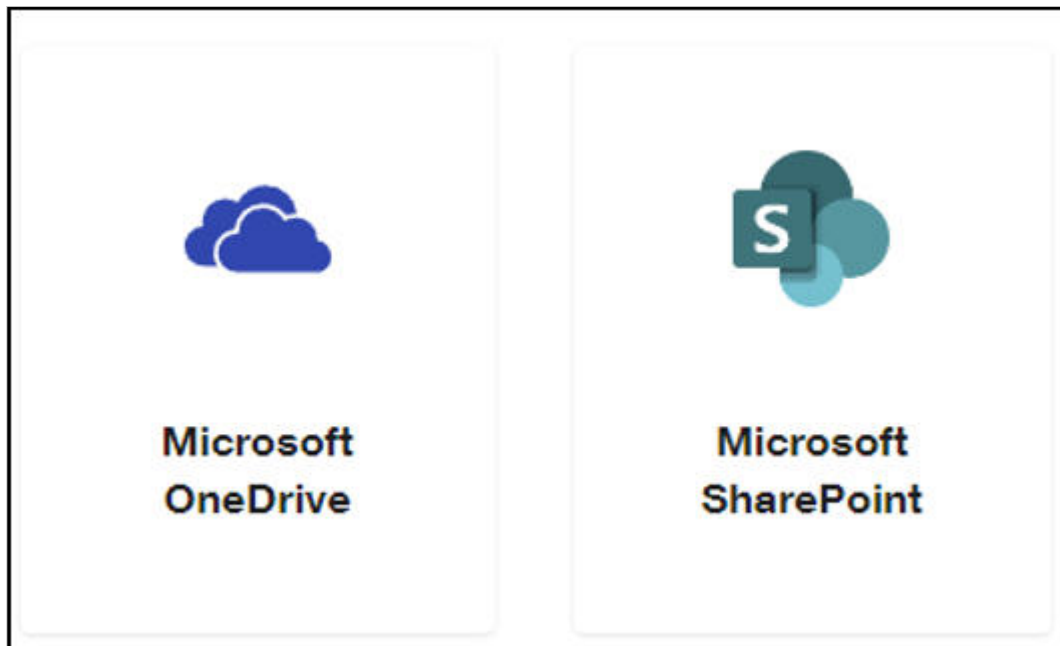
- In the DocuSign Admin portal, go to **Connections** page (under Agreement Actions section).



- In the **Connections** page, click on the **CONNECT NEW APP** button.



- Select the APP which was decided where the files are to be saved to. OneDrive or SharePoint.

**IMPORTANT NOTES:**

We highly recommend using SharePoint, as SharePoint site is designed to be shared and collaborative between users. OneDrive is an individual storage, and it requires extra configurations to share the storage out for other users to access.

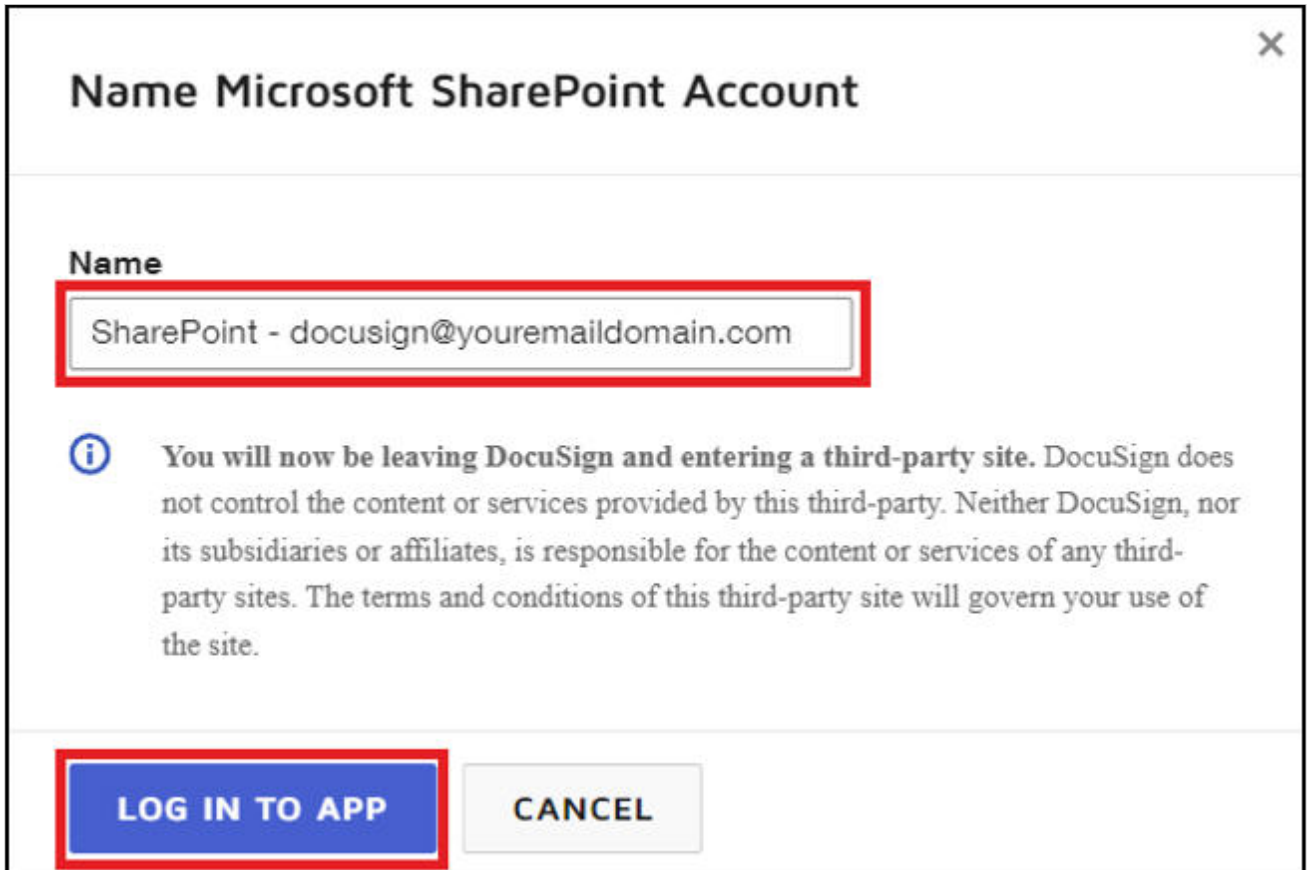
The account used to log into the OneDrive App will be the individuals drive that the files are saved to. Appropriate permissions must be assigned to the folders to where the files will be saved to for the users who will require the ability to view the documents from the Rental Quote and Rental Contract.

Whether you are using SharePoint or OneDrive, it is advisable to create a dedicated service account to configure the integration. If you use an individual account, the integration may stop working if such accounts get blocked/deleted (i.e., when the individual leaves the organization)

4.19.2.3.2.4.**If you choose SharePoint (Highly Recommended)**

Complete the following steps.

- In your Office 365 environment, create a SharePoint site to store DocuSign documents. You can name the site as DocuSign.
- Also In your Office 365 environment, create a dedicated service account (such as docusign@youremaildomain.com), and give this account Full access to the new SharePoint site above.
- Wait for one hour for the permission to take effect.
- Back in DocuSign Admin Portal, click on Microsoft SharePoint icon. In the window that pops up enter a nickname for the integration. We recommend using this naming convention: SharePoint – [serviceaccount] (e.g. SharePoint – docusign@youremaildomain.com), so that you know which account was used to configure this integration.
- Log in using the service account credentials.

A screenshot of a web browser window titled "Name Microsoft SharePoint Account". The window has a close button (X) in the top right corner. Below the title bar, there is a section labeled "Name" with a text input field containing the text "SharePoint - docusign@youremaildomain.com". Below the input field, there is an information icon (i) followed by a paragraph of text: "You will now be leaving DocuSign and entering a third-party site. DocuSign does not control the content or services provided by this third-party. Neither DocuSign, nor its subsidiaries or affiliates, is responsible for the content or services of any third-party sites. The terms and conditions of this third-party site will govern your use of the site." At the bottom of the window, there are two buttons: "LOG IN TO APP" (highlighted with a red box) and "CANCEL".

Name Microsoft SharePoint Account

Name

SharePoint - docusign@youremaildomain.com

i You will now be leaving DocuSign and entering a third-party site. DocuSign does not control the content or services provided by this third-party. Neither DocuSign, nor its subsidiaries or affiliates, is responsible for the content or services of any third-party sites. The terms and conditions of this third-party site will govern your use of the site.

LOG IN TO APP **CANCEL**

4.19.2.3.2.5.**If you choose OneDrive**

Complete the following steps.


- In your Office 365 environment, create a dedicated service account (such as docusign@youremaildomain.com), and assign an Office 365 license that has OneDrive service.
- Back in DocuSign Admin Portal, click on Microsoft OneDrive icon. In the window that pops up enter a nickname for the integration. We recommend using this naming convention: OneDrive – [serviceaccount] (e.g. OneDrive – docusign@youremaildomain.com), so that you know which account was used to configure this integration.
- Log in using the service account credentials.

×

Name Microsoft OneDrive Account

Name

OneDrive - docusign@youremaildomain.com



You will now be leaving DocuSign and entering a third-party site. DocuSign does not control the content or services provided by this third-party. Neither DocuSign, nor its subsidiaries or affiliates, is responsible for the content or services of any third-party sites. The terms and conditions of this third-party site will govern your use of the site.

LOG IN TO APP

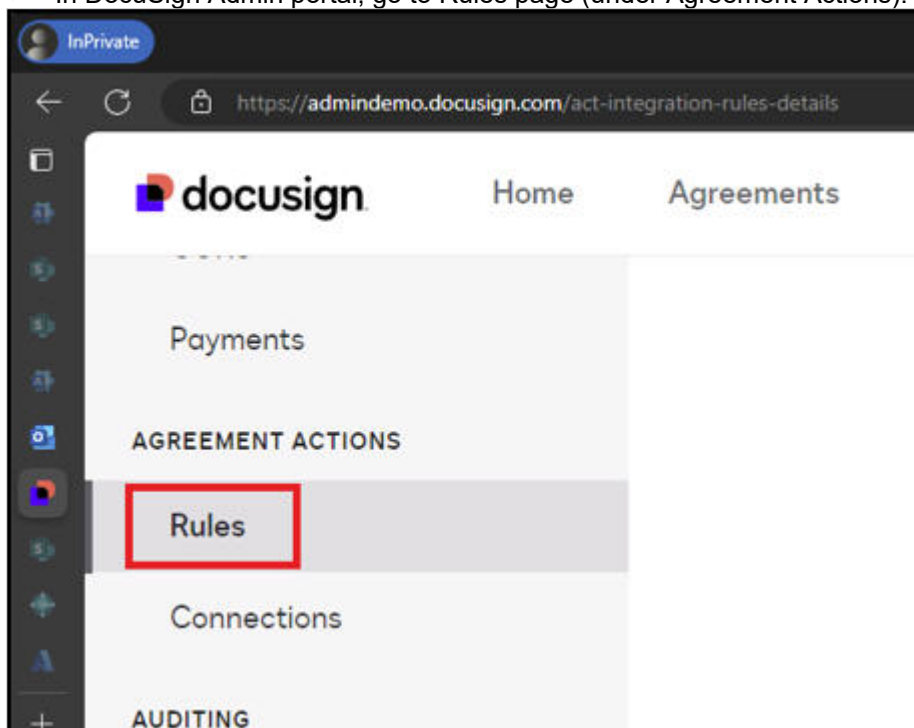
CANCEL

4.19.2.3.2.6.

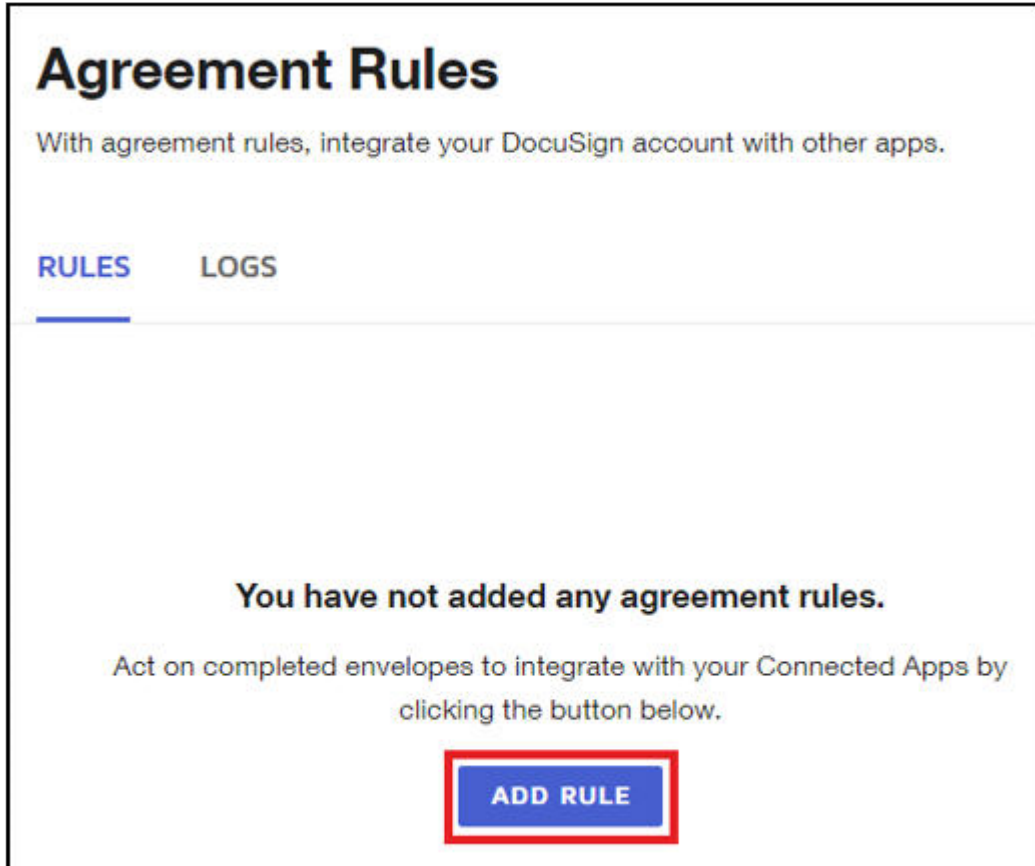
Create Agreement Rules

After you configure the SharePoint or OneDrive integration in DocuSign, you will create Agreement Rules so that the system will automatically store DocuSign documents into the SharePoint site or OneDrive storage

- In DocuSign Admin portal, go to Rules page (under Agreement Actions).



- Select ADD RULE.

A screenshot of the "Agreement Rules" interface. At the top, the title "Agreement Rules" is displayed in a large, bold font. Below the title, a subtitle reads: "With agreement rules, integrate your DocuSign account with other apps." There are two tabs: "RULES" (which is selected and underlined) and "LOGS". The main content area contains the message: "You have not added any agreement rules." followed by the instruction: "Act on completed envelopes to integrate with your Connected Apps by clicking the button below." At the bottom center, there is a blue button with the text "ADD RULE" in white, which is highlighted with a red rectangular border.

Configure the new rules as follows:

- **Name:** Enter a name to represent the new Rule. Such as ***Auto archive document into DocuSign SharePoint site***, or ***Auto archive document into docusign@youremaildomain.com OneDrive storage***.
- **Options:** Check Enable Rule.

A screenshot of the "Settings" form for configuring a new rule. The title "Settings" is at the top. Below it, the "Name" field is marked with a red asterisk and contains the text "Auto archive document into DocuSign SharePoint site". Under the "Options" section, there is a checkbox labeled "Enable rule" which is checked with a blue checkmark.

- **Conditions:** If - Sender – Name – Is – [The DocuSign Admin Account]

Set Conditions

Set the conditions you will need for an agreement action.

If of the conditions below are true,

If	<input type="text" value="Sender"/>	<input type="text" value="Name"/>	<input type="text" value="is"/>
	<input type="text" value="DocuSign Admin Account"/>		

Actions: (if you use SharePoint): Archive to – [Microsoft SharePoint] – [The SharePoint Site] – [The Document Library in the SharePoint site]

Add Actions

Based on those conditions, add an action for your completed envelopes. [View guide for more instruction.](#)

Then	<input type="text" value="Archive to"/>	<input type="text" value="[Microsoft Share"/>	<input type="text" value="DocuSign"/>	<input type="text" value="Documents"/>
	<input type="text" value="CUSTOMIZE"/>			

The SharePoint Integration
The SharePoint site we created earlier
The Document library in the SharePoint site

- **Actions:** (if you use OneDrive): Archive to – [Microsoft OneDrive]

Add Actions

Based on those conditions, add an action for your completed envelopes. [View guide for more instruction.](#)

Then	<input type="text" value="Archive to"/>	<input type="text" value="[Microsoft OneDrive] OneDrive - docusign@yourem"/>
	<input type="text" value="CUSTOMIZE"/>	

- Customize the rule using the **Customize** button to add the Document Name after the destination folder so that the Document No. will be in the filename.
- (Optional): Customize the folder name/ path to store the signed documents in a sub folder.

The following picture displays an example of customizing for both the folder name/path and adding the Document Name.

Add Actions

Based on those conditions, add an action for your completed envelopes. [View guide for more instruction.](#)

Then

Archive to ▼

[Microsoft Share! ▼

DocuSign ▼

Documents ▼

CUSTOMIZE ▼

Customize file and folder name/path

Close Discard

BusinessCentral/Signature Archive/ Document Name x

.pdf

To insert a dynamic value, enter "+" and select the fields you would like to use.

- Finally, click **Save** to save the rule.

[Agreement Rules](#) > [Add Rule](#)

Add Rule

Create an agreement rule for your completed envelopes. [View guide for more instruction.](#)

SAVE

CANCEL

Settings

Name *

Auto archive document into DocuSign SharePoint site

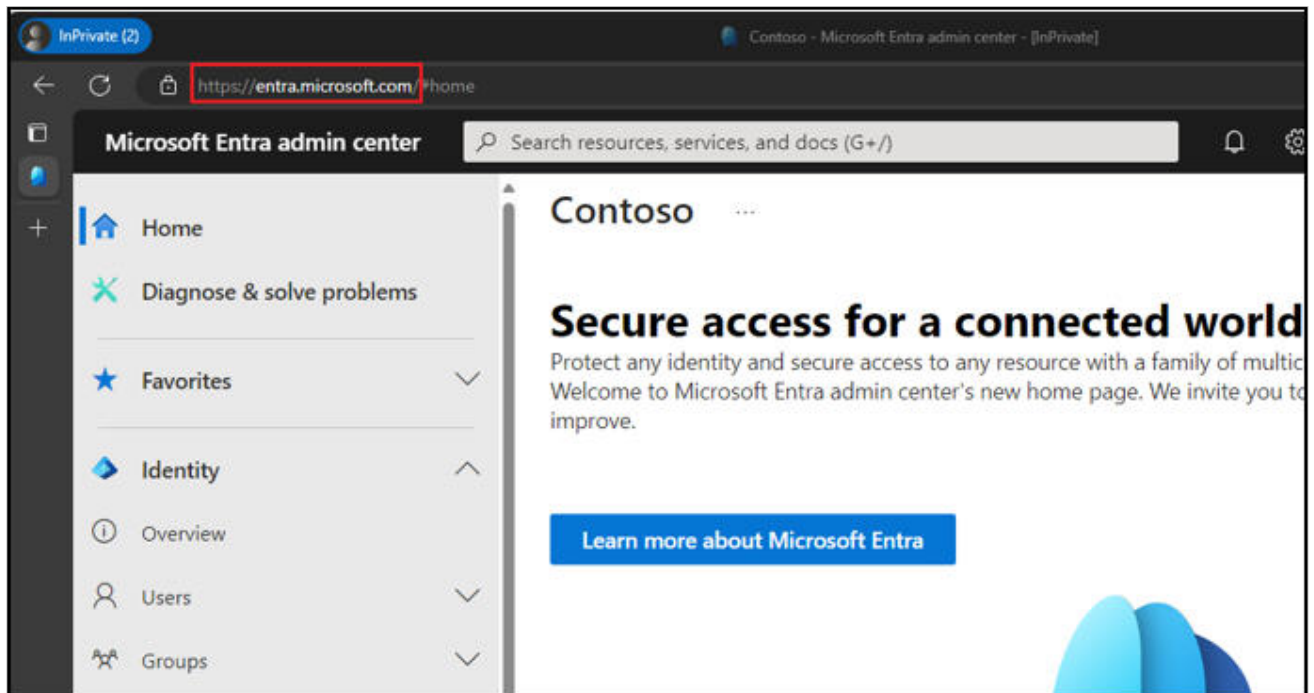
Explanation of the rule:

When Rentals use DocuSign to send the documents for signature, it will use the DocuSign Admin Account (the account we use to create and configure Integration in DocuSign) to send such emails.

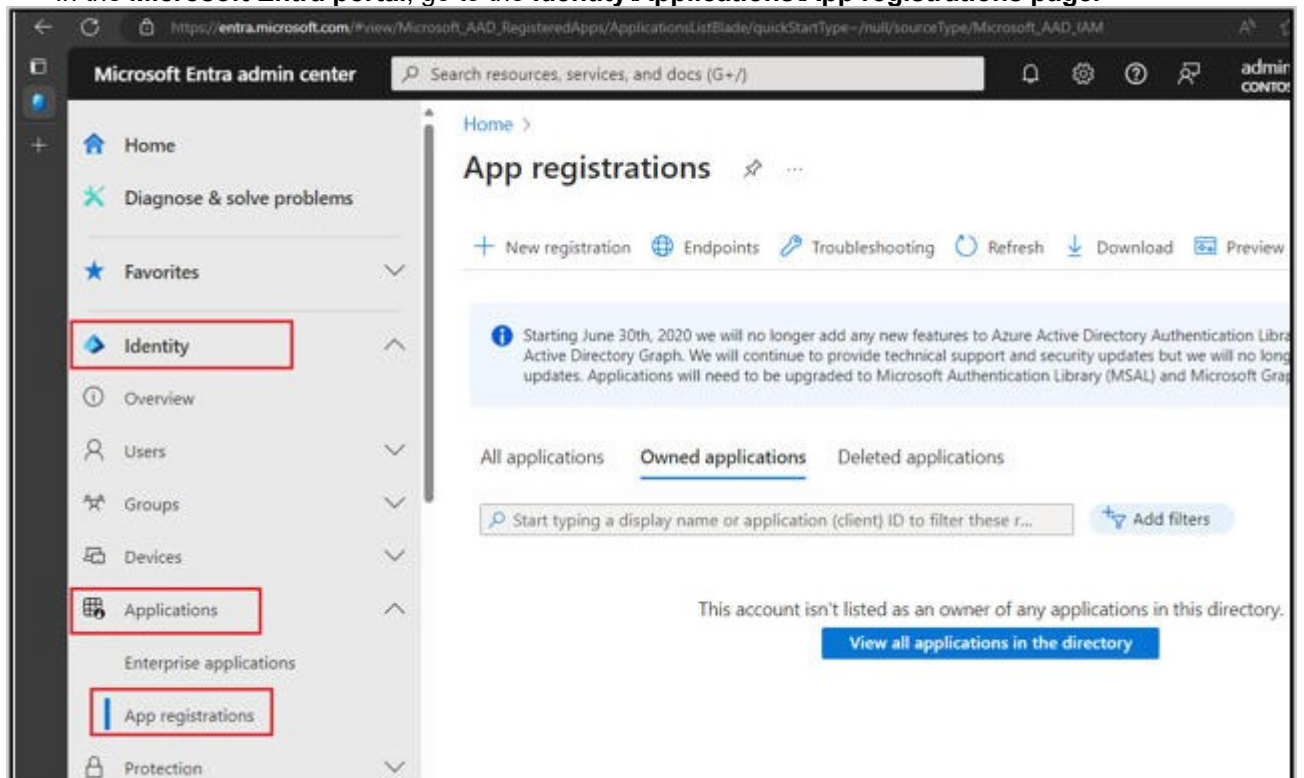
The purpose of this rule is to archive all DocuSign documents, sent by this DocuSign Admin Account, to the designated SharePoint site or OneDrive account you configure in DocuSign.

4.19.2.4. How to Create and Configure an Entra ID App Registration

- Login to your **Microsoft Entra ID portal**, <https://entra.microsoft.com>, using your Microsoft 365 admin account.



- In the **Microsoft Entra portal**, go to the **Identity\Applications\App registrations** page.



- In the **App registrations** page, click **New registration**.

Home >

App registrations

+ New registration Endpoints Troubleshooting Refresh Download Preview features

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

All applications Owned applications Deleted applications

Start typing a display name or application (client) ID to filter these r... Add filters

- Enter the Name of the app. For example, **Online Drive Integration for ODT Rentals in Business Central**.
- Supported account types: **Account in this organization directory only**.
- Then click on **Register**.

Home > App registrations >

Register an application

* Name

The user-facing display name for this application (this can be changed later).

Online Drive Integration for ODT Rentals in Business Central

Supported account types

Who can use this application or access this API?

☒ Accounts in this organizational directory only (Contoso only - Single tenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

☐ Personal Microsoft accounts only

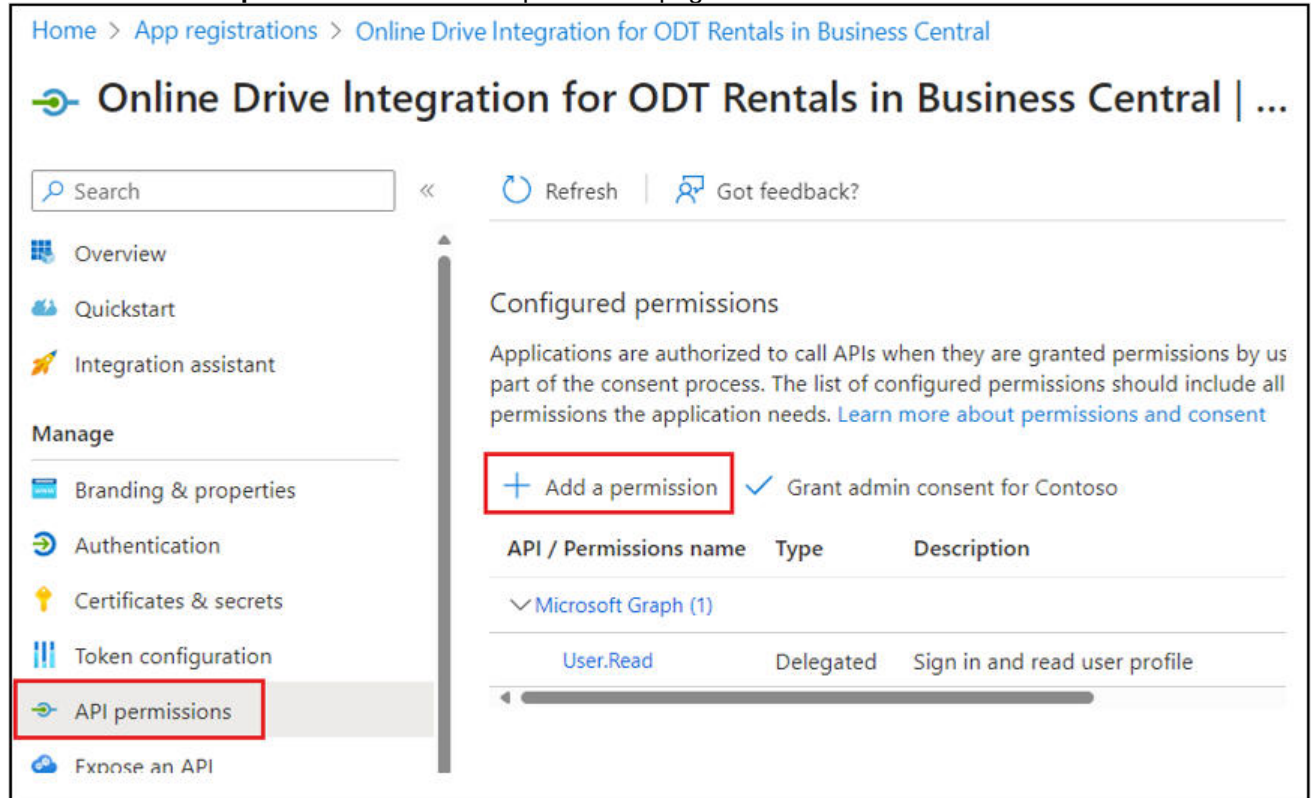
[Help me choose...](#)

Redirect URI (optional)

By proceeding, you agree to the [Microsoft Platform Policies](#)

Register

- Under the **Manage** section, select **API permissions**.
- Click on **Add a permission** on the API permission page.



Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business Central | ...

Search << Refresh Got feedback?

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Configured permissions

Applications are authorized to call APIs when they are granted permissions by us part of the consent process. The list of configured permissions should include all permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for Contoso



API / Permissions name	Type	Description
▼ Microsoft Graph (1)		
User.Read	Delegated	Sign in and read user profile


Add all the permissions noted below with the **API of Microsoft Graph** and the **Type set to Delegated**.

- APIConnectors.Read.All
- APIConnectors.ReadWrite.All
- Application.Read.All
- Directory.AccessAsUser.All
- Directory.Read.All

- Files.Read
- Files.Read.All
- Files.Read.Selected
- Organization.Read.All
- Sites.FullControl.All
- User.Read



API Permissions after all required permissions have been entered.








 Refresh
  Got feedback?

 You are editing permission(s) to your application, users will have to consent even if they've already done so previously.



Configured permissions


Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions shows all the permissions the application needs. [Learn more about permissions and consent](#)

 Add a permission
  Grant admin consent for Contoso

API / Permissions name	Type	Description	Admin consent required	Status
Microsoft Graph (11)				
APIConnectors.Read.All	Delegated	Read API connectors for authentication flows	Yes	 Not granted for
APIConnectors.ReadWrite.All	Delegated	Read and write API connectors for authentication flows	Yes	 Not granted for
Application.Read.All	Delegated	Read applications	Yes	 Not granted for
Directory.AccessAsUser.All	Delegated	Access directory as the signed in user	Yes	 Not granted for
Directory.Read.All	Delegated	Read directory data	Yes	 Not granted for
Files.Read	Delegated	Read user files	No	
Files.Read.All	Delegated	Read all files that user can access	No	
Files.Read.Selected	Delegated	Read files that the user selects (preview)	No	
Organization.Read.All	Delegated	Read organization information	Yes	 Not granted for
Sites.FullControl.All	Delegated	Have full control of all site collections	Yes	 Not granted for
User.Read	Delegated	Sign in and read user profile	No	



- Click on the **Grant Admin consent** button.

 Refresh
  Got feedback?

 Successfully granted admin consent for the requested permissions.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions shows all the permissions the application needs. [Learn more about permissions and consent](#)

 Add a permission
  Grant admin consent for Contoso

- After granting the admin access the permission list should look like the following list with the Status updated.

+ Add a permission		✓ Grant admin consent for Contoso		
API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Microsoft Graph (11)				
APIConnectors.Read.All	Delegated	Read API connectors for authentication flows	Yes	✓ Granted for
APIConnectors.ReadWrite.All	Delegated	Read and write API connectors for authentication flows	Yes	✓ Granted for
Application.Read.All	Delegated	Read applications	Yes	✓ Granted for
Directory.AccessAsUser.All	Delegated	Access directory as the signed in user	Yes	✓ Granted for
Directory.Read.All	Delegated	Read directory data	Yes	✓ Granted for
Files.Read	Delegated	Read user files	No	✓ Granted for
Files.Read.All	Delegated	Read all files that user can access	No	✓ Granted for
Files.Read.Selected	Delegated	Read files that the user selects (preview)	No	✓ Granted for
Organization.Read.All	Delegated	Read organization information	Yes	✓ Granted for
Sites.FullControl.All	Delegated	Have full control of all site collections	Yes	✓ Granted for
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for

- In the **Manage** section, select **Certificates & secrets**.

Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business Central | Ce

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Token configuration

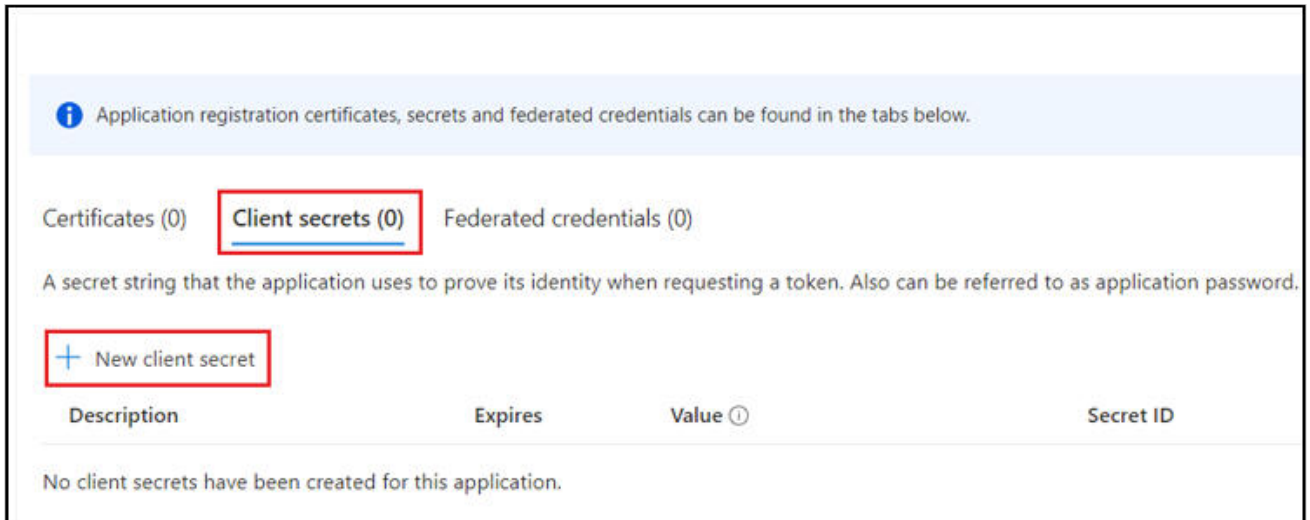
Credentials enable confidential applications to identify themselves to the authentic HTTPS scheme). For a higher level of assurance, we recommend using a certificate (i

Application registration certificates, secrets and federated credentials can be found

Certificates (0) Client secrets (0) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a tol

- On the **Certificates & secrets** page, go to the **Client secrets** tab and click on **New client secret**.



Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

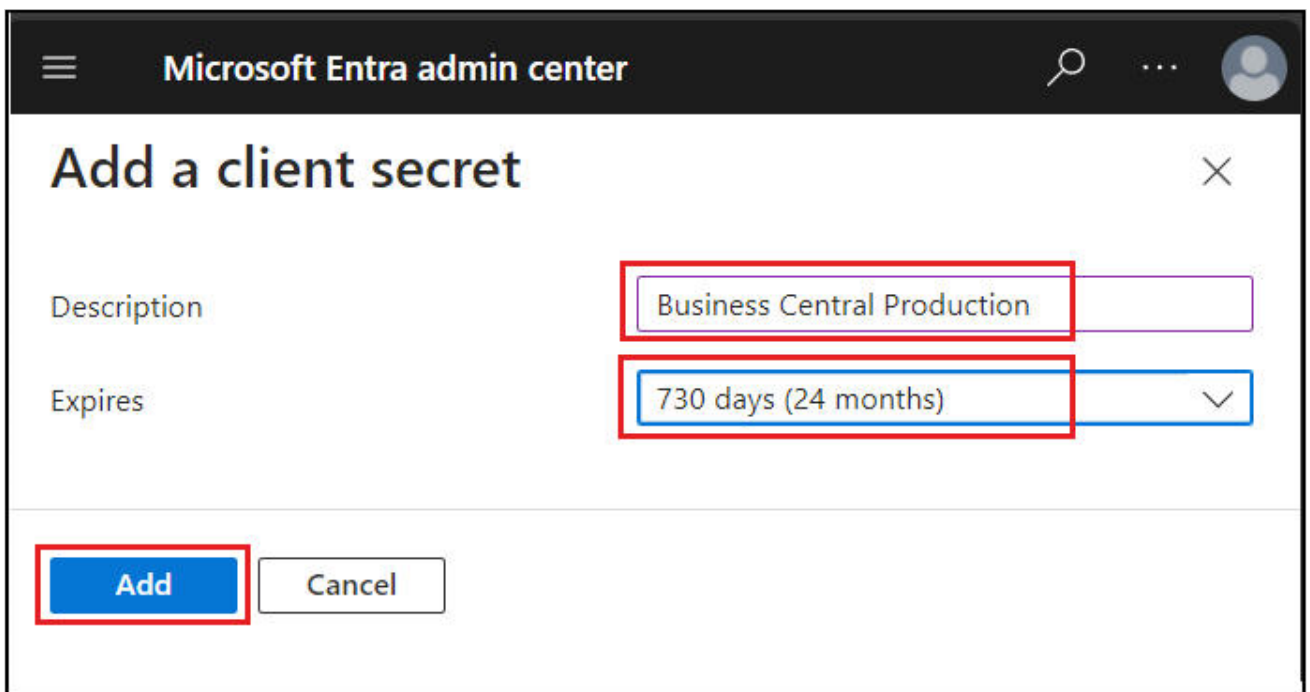
+ New client secret

Description	Expires	Value ⓘ	Secret ID
No client secrets have been created for this application.			

- Enter a Description: For example, **Business Central Production**
- Expires: Select the **730 days (24 months)** option.
- Click on **Add** to create the Client secret.

NOTE:

The client secret key is like an account password, which will expire according to the Expires date you set. Please create a reminder to create a new client secret before the expiration date, to prevent any service disruption.



Microsoft Entra admin center

Add a client secret

Description: Business Central Production

Expires: 730 days (24 months)

Add Cancel



IMPORTANT!

Make a note of the **Value of the Client Secret key** as you will need it to configure the OneDrive and Online Drive integration in the ODT Rentals app.

Certificates (0) Client secrets (1) Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.


+ New client secret


Description	Expires	Value ⓘ	Secret ID
Business Central Production	4/15/2026	w0A8Q~dIf3qJ4KL1AFNM... 	e507fd95-6fd9-4696-a4f3... 


- In the **Manage** section, select **Authentication** to open the Authentication page.


Home > App registrations > Online Drive Integration for ODT Rentals in Business Central

Online Drive Integration for ODT Rentals in Business


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 **Authentication**

 Certificates & secrets

Platform configurations

Depending on the platform or device this application configuration may be required such as redirect URIs, specific fields specific to the platform.

+ Add a platform


Supported account types

Who can use this application or access this API?

- On the **Authentication** page, click on **Add a platform**.

Platform configurations

Depending on the platform or device this application is targeting, additional configuration may be required such as redirect URIs, specific authentication settings, or fields specific to the platform.

 Add a platform

Supported account types

Who can use this application or access this API?

- ☒ Accounts in this organizational directory only (Contoso only - Single tenant)
- ☐ Accounts in any organizational directory (Any Microsoft Entra ID tenant -

- Select the **Web** option.

Configure platforms

Web applications



Web

Build, host, and deploy a web server application. .NET, Java, Python



Single-page application

Configure browser client applications and progressive web applications. Javascript.

Mobile and desktop applications

- **Redirect URL:** <https://businesscentral.dynamics.com/OAuthLanding.htm>.
- **Implicit grant and hybrid flows:** Access tokens (used for implicit flows).
- Click on **Configure**.

IMPORTANT:

Make note of the Redirect URL as you will need this information to configure the External Connector for the Online Drive integration in the ODT Rentals app.

Configure Web

[All platforms](#)

QuickstartDocs

* Redirect URIs

The URIs we will accept as destinations when returning authentication responses (tokens) after successfully authenticating or signing out users. The redirect URI you send in the request to the login server should match one listed here. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions](#)

https://businesscentral.dynamics.com/OAuthLanding.htm

Front-channel logout URL

This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.

e.g. https://example.com/logout

Implicit grant and hybrid flows

Request a token directly from the authorization endpoint. If the application has a single-page architecture (SPA) and doesn't use the authorization code flow, or if it invokes a web API via JavaScript, select both access tokens and ID tokens. For ASP.NET Core web apps and other web apps that use hybrid authentication, select only ID tokens. [Learn more about tokens](#).

Select the tokens you would like to be issued by the authorization endpoint:

☒ Access tokens (used for implicit flows)

☐ ID tokens (used for implicit and hybrid flows)

Configure

Cancel

- Go to the **Overview** page and **take note of the Application (client) ID value** as you will need it to configure the Online Drive integration in the ODT Rentals app.

Home > App registrations >

Online Drive Integration for ODT Rentals in Business Central

Search << Delete Endpoints Preview features

Overview

Quickstart

Integration assistant

Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

^ Essentials

Display name
[Online Drive Integration for ODT Rentals in Business Central](#)

Application (client) ID
5dc08586-1382-42d1-bf48-b4ceb76c4bd8

Object ID
7c485f1b-9065-42c3-b95e-83a9e62df3aa

Directory (tenant) ID
e6fab142-afc1-4c46-bd7f-982d16459dc0

Supported account types
[My organization only](#)

- On the Overview page, click on the **Endpoints** button.
- Take note of the **OAuth 2.0 authorization endpoint (v2)** and **OAuth 2.0 token endpoint (v2)** values as you will need this information to configure the External Connector for the Online Drive integration in the ODT Rentals app.

Home > Contoso > App registrations > Contoso > App registrations >

Online Drive Integration for ODT Rentals in Bu

Search << Delete Endpoints Preview features

Overview

Essentials

Endpoints

OAuth 2.0 authorization endpoint (v2)

<https://login.microsoftonline.com/e6fab142-afc1-4c46-bd7f-982d16459dc0/oauth2/v2.0/authorize>

OAuth 2.0 token endpoint (v2)

<https://login.microsoftonline.com/e6fab142-afc1-4c46-bd7f-982d16459dc0/oauth2/v2.0/token>

OAuth 2.0 authorization endpoint (v1)

<https://login.microsoftonline.com/e6fab142-afc1-4c46-bd7f-982d16459dc0/oauth2/authorize>

4.19.2.5. How to Setup in Rentals for Using DocuSign

4.19.2.5.1. Overview

The setups for using DocuSign when sending the Rental Quote or Rental Contract for signatures consist of setting up:

- The external connector with the E-sginature settings to DocuSign
- The external connector for the online drive where the files are to be saved to.
- Activate the External Connectors integration with ODT Rentals.
- Configuration on Rental Management Setup for the connectors and folder the files are to be saved to.

4.19.2.5.2. How to Setup an External Connector for DocuSign

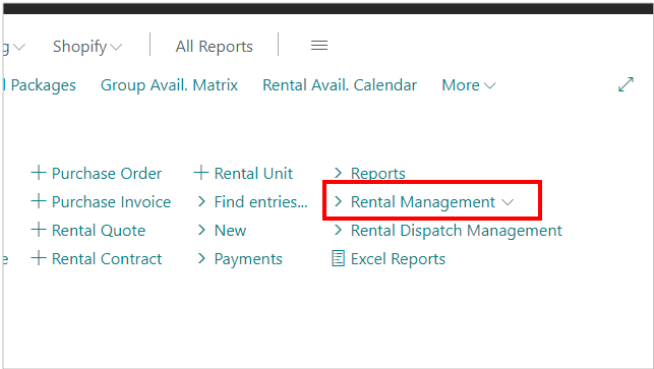
The setup of the External Connectors consists of the connector for DocuSign and the connector for the Online Drive folder where the files will be saved to in SharePoint or in OneDrive based on which App was specified in DocuSign.

The following covers the setup of the External Connector for DocuSign.

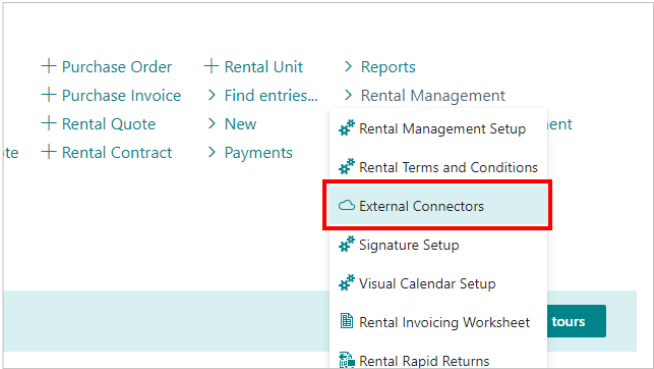


ODT Rentals Online Help

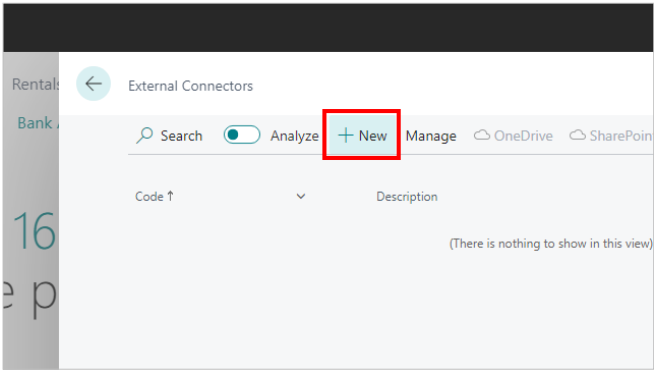
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **External Connectors**



Click on the navigation menu item **New**



External Connector Page

Enter the following on the General tab:

- **Code:** CREATE-ENVELOPE
- **E-Signature Type:** DocuSign
- **Send to Email Type:** Select either Customer or Contact.
- **Description:** Create and send envelope for email signature

- **Request URI:** restapi/v2.1/accounts/{accountId}/envelopes.

UserBase Request URI:

https://account-d.docusign.com/oauth/userinfo (For Demo)

- https://account.docusign.com/oauth/userinfo (For Live)
- **Method:** POST

- **Authorization:** Bearer
- **Mode:** cors
- **Content Type:** application/json
- **Email Subject:** Please sign the attached document.
- **Status:** sent

Enter the following on the Sign Here Tabs, Sign 1 section:

- **Anchor String:** Remote Signature
- **Anchor X Offset:** 10
- **Anchor Y Offset:** 20
- **Anchor Units:** pixels

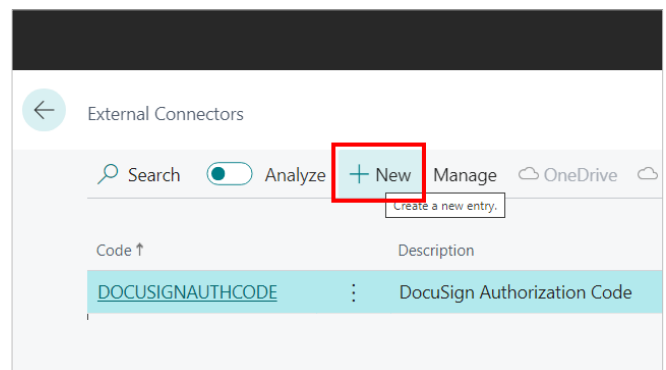
Should the location of the signature on the rental documents require modification please contact support@opendoorerp.com.

4.19.2.5.3.

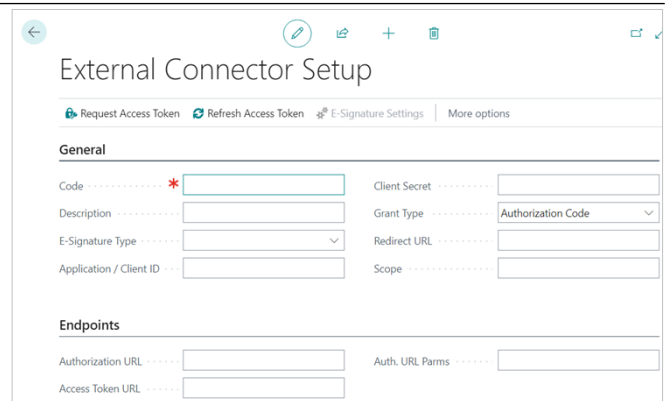
How to Setup an ONLINEDRIVE External Connector

The Online Drive Connector is used for connecting DocuSign to the App folder specified for OneDrive or SharePoint.

Click on the navigation menu item **New**



ONLINEDRIVE Connector Setup Page



- **Code:** Enter ONLINEDRIVE
- **Description:** Enter Online Drive Connector
- **Application / Client ID:** Copy and paste the **Application (client) ID** you saved when setting up the Entra ID App Registration. It can be located in the Microsoft Entra ID portal, Overview, Essentials.
- **Client Secret:** Copy and paste the Value of the Client Secret Key you saved when setting up the Entra ID App Registraton. It can be located in the Microsoft Entra ID portal, Certificates & secrets, Client secrets.
- **Grant Type:** Authorization Code
- **Redirect URL:** Enter https://businesscentral.dynamics.com/OAuthLanding.htm
- **Scope:** Enter https://graph.microsoft.com/.default

Endpoints: Copy and paste values you saved when setting up the Entra ID App Registration from the Microsoft Entra ID portal, Overview, Essentials – Endpoints list.

- **Authorization URL:** Paste the saved endpoint for the OAuth 2.0 authorization endpoint (v2) field.
- **Access Token URL:** Paste the saved endpoint for the OAuth 2.0 token endpoint (v2) field.

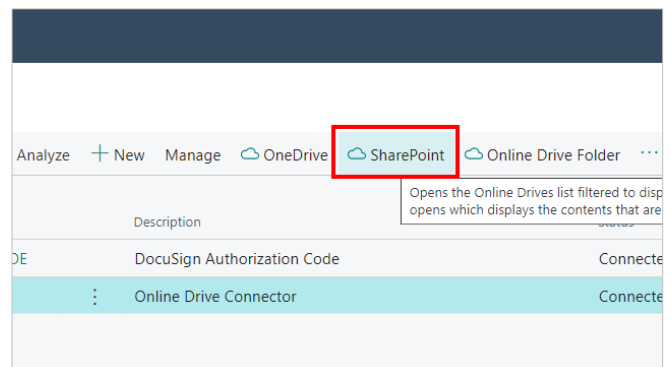
4.19.2.5.4.

How to Configure the ONLINE DRIVE for SharePoint

If your organization has chosen to store the signed documents on SharePoint, then complete the following steps.

Click on the navigation menu item **SharePoint**

Ensure you are on the Online Drive Connector record before selecting SharePoint.

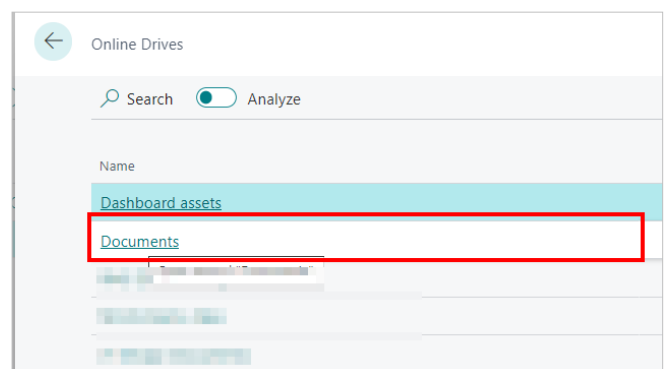


NOTE:

The folders selected in the next steps must be the same folders in the same order as specified in DocuSign when customizing the folder path to the folder that the signed documents are to be saved in.

Documents/Business Central/Signature Archived

Click on the link in cell **Name** with the value **Documents**





ODT Rentals Online Help

Click on the link in cell **Name** with the value **Business Central**

Name	Is File	Created Date
Business Central		2/29/2024

Click on the navigation menu item **Save Folder as Drive**

When you reach the folder in which the signed documents are to be saved in, then click on the Save Folder as Drive.

/Business Central

Name	Is File	Created Date
Signature Archived		2/29/2024

Click on the field **Online Drive Code**

Signature Archived

OK Cancel

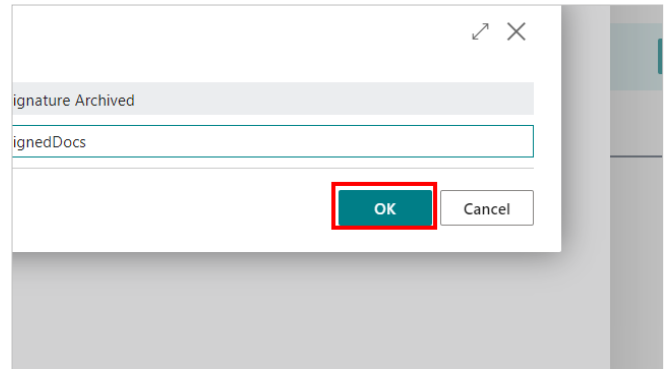
Enter the text **SignedDocs**.

Signature Archived

SignedDocs

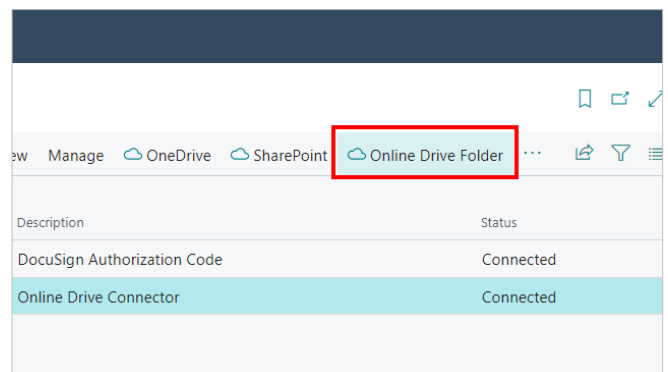
OK Cancel

Click on the button **OK**

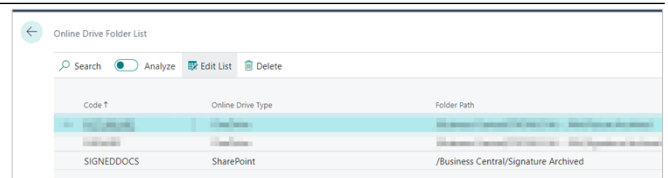


The details of the Online Drive for SharePoint can be viewed from the External Connectors page.

Click on the navigation menu item **Online Drive Folder**



Online Drive Folder List

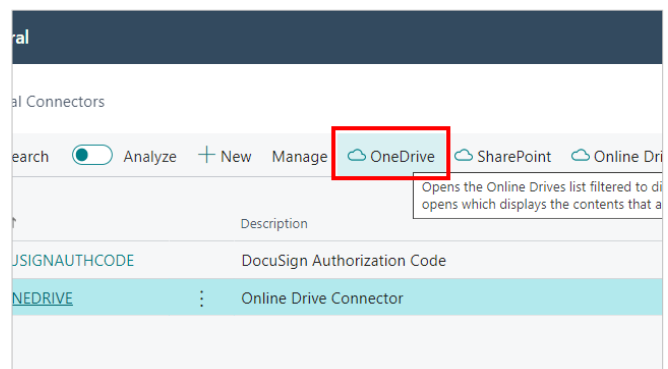


4.19.2.5.5.

How to Configure the ONLINE DRIVE for OneDrive

If your organization has chosen to store the signed documents on OneDrive, then complete the following steps.

Click on the navigation menu item **OneDrive**



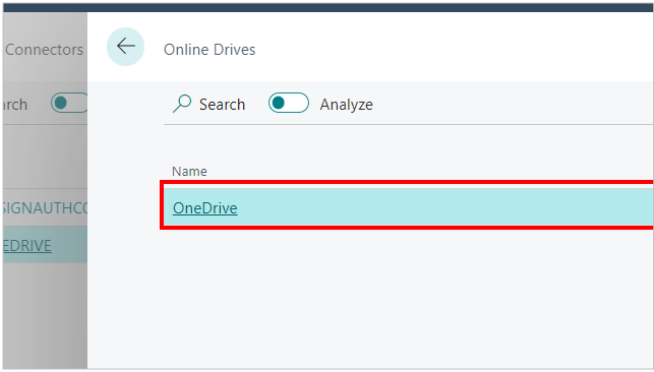
NOTE:

The folders selected in the next steps must be the same folders in the same order as specified in DocuSign when customizing the folder path to the folder that the signed documents are to be saved in.

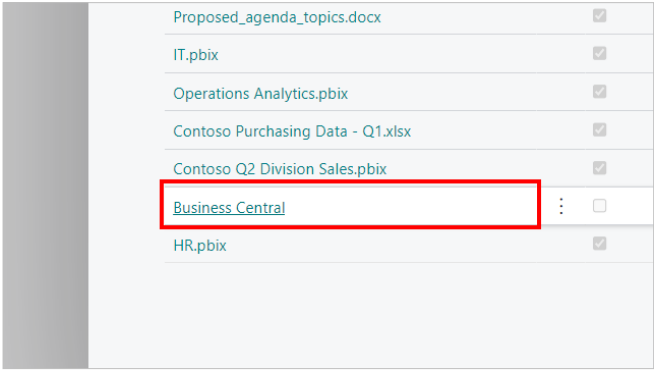


ODT Rentals Online Help

Click on the link in cell **Name** with the value **OneDrive**

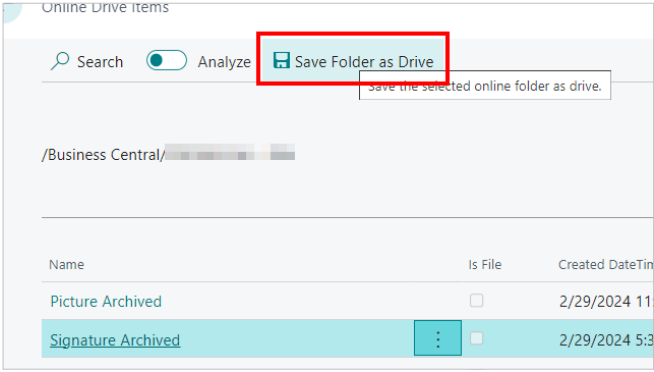


Click on the link in cell **Name** with the value **Business Central**

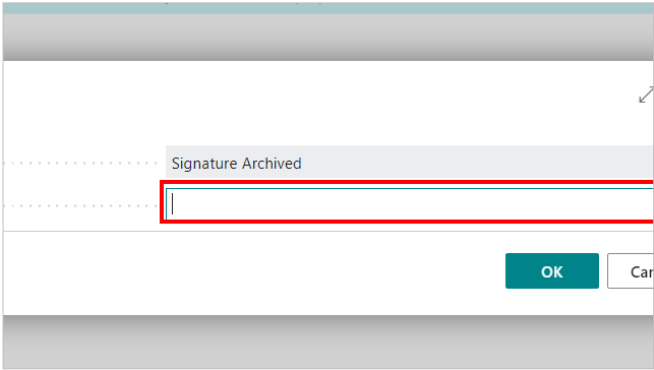


Click on the navigation menu item **Save Folder as Drive**

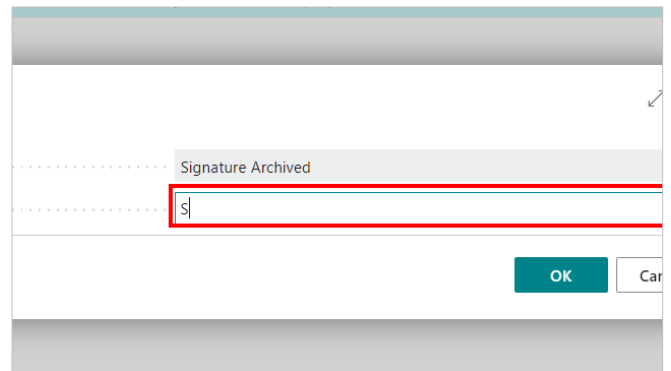
When you reach the folder in which the signed documents are to be saved in, then click on the Save Folder as Drive.



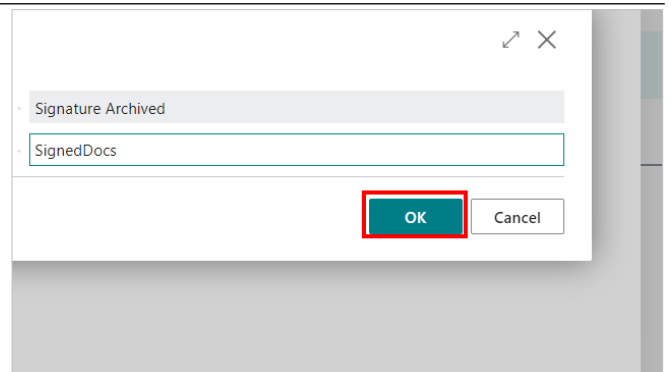
Click on the field **Online Drive Code**



Enter the text **SignedDocs**.



Click on the button **OK**



The details of the Online Drive for OneDrive can be viewed from the External Connectors page, Online Drive Folder List.

4.19.2.5.6.

Rentals

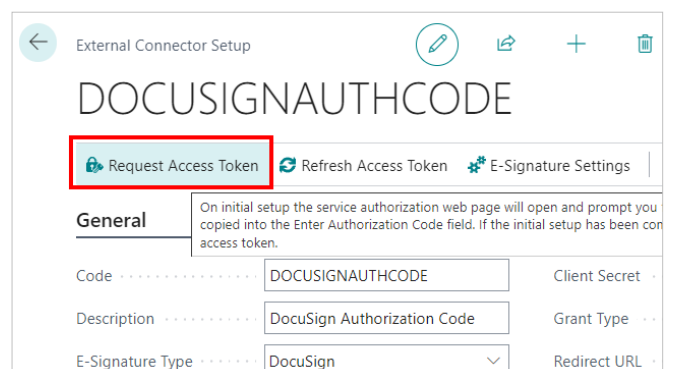
How to Activate the External Connectors Integration to ODT

Once the following setups are completed, then you **must activate the integration to DocuSign and SharePoint or OneDrive** in ODT Rentals by selecting the menu option Request Access Token on the DocuSign external connector. This is mandatory for the feature to function.

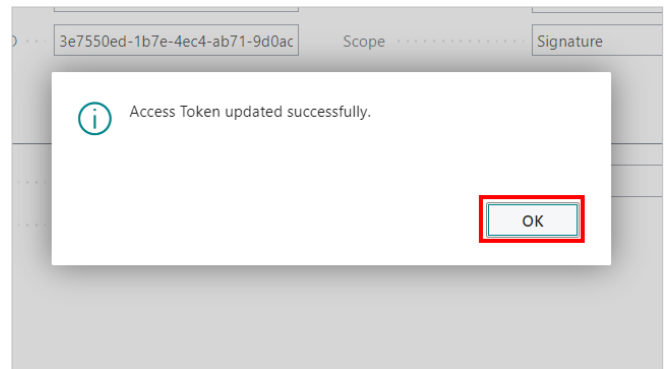
- OneDrive or SharePoint site and folder(s) and Permissions.
- DocuSign Setup and Configuration
- Create and configure an Entra App Registration on Entra ID.
- Create an External Connector for DocuSign with the E-Signature Setting and the connector for the online drive to be used in Business Central.

The following demonstrates activating the integration from the DocuSign External Connector.

Click on the navigation menu item **Request Access Token**



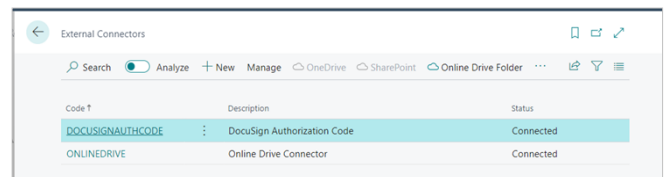
Click on the button **OK**



When the activation is successful, then the Status will display Connected.

If the Activation is not successful, then the Status will display Error and the setups in DocuSign and Business Central will need to be reviewed.

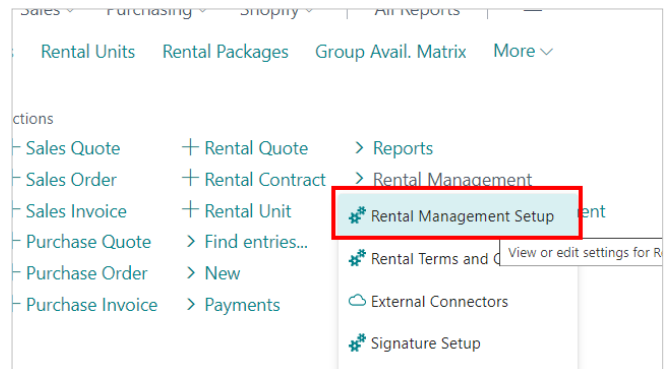
External Connectors when the activation is successful.



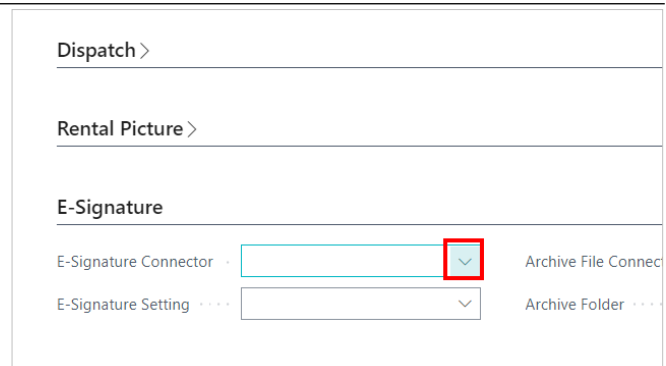
4.19.2.5.7.

How to Setup Rental Management Setup for DocuSign

Click on the navigation menu item **Rental Management Setup**



Click on the lookup button **E-Signature Connector**





Click on the link in cell **Code** with the value **DOCUSIGNAUTHCODE**

Code ↑	Description
DOCUSIGNAUTHCO...	DocuSign Authorizatio

Select record "DOCUSIGNAUTHCODE"

+ New

E-Signature Connector ·····

Archive File

Click on the lookup button **E-Signature Setting**

Dispatch >

Rental Picture >

E-Signature

E-Signature Connector ····· DOCUSIGNAUTHCODE

Archive File Connector

E-Signature Setting ·····

Archive Folder ·····

Click on the link in cell **Code** with the value **CREATE-ENVELOPE**

Code ↑	Description
CREATE-ENVELOPE	Create and send envel

Select record "CREATE-ENVELOPE"

E-Signature

E-Signature Connector ·····

E-Signature Setting ·····

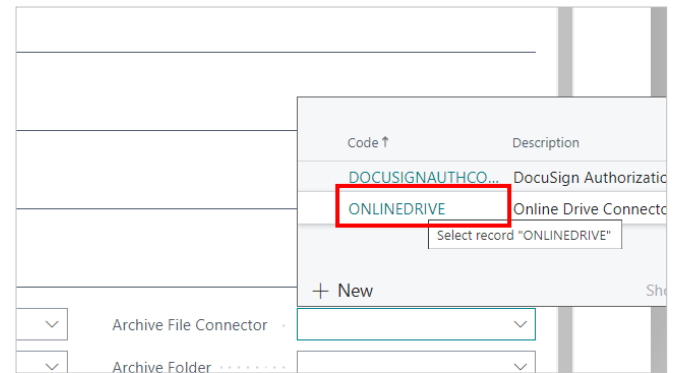
Archive Fold

Click on the lookup button **Archive File Connector**

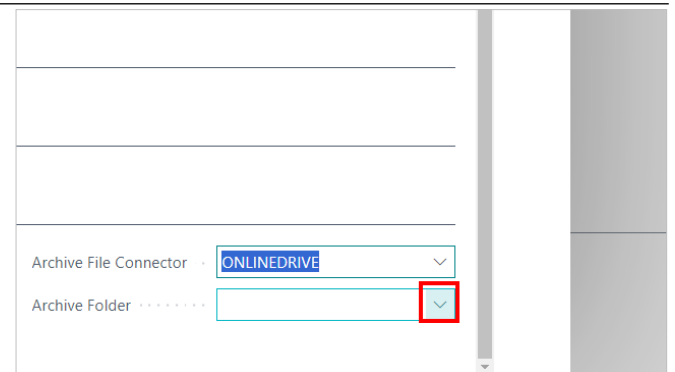
Archive File Connector ·····

Archive Folder ·····

Click on the link in cell **Code** with the value **ONLINEDRIVE**

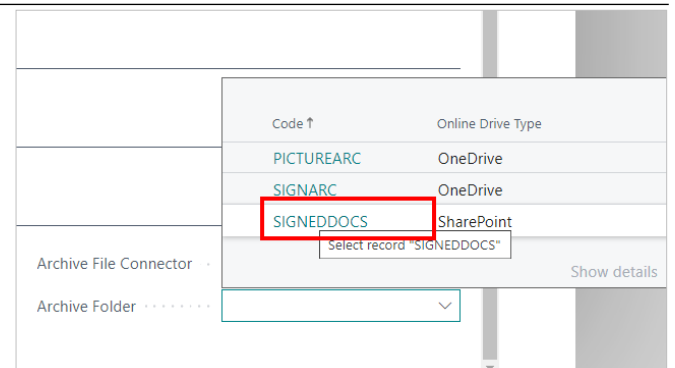


Click on the lookup button **Archive Folder**



Click on the link in cell **Code** with the value **SIGNEDDOCS**

Select the applicable Online Drive record related to where the signed documents are to be saved to.



4.19.2.6. How to Send Documents for Signing

4.19.2.6.1. Overview

When a Rental Quote or Rental Contract is sent for signing, then DocuSign sends an email with the document for signing by the Customer or Contact per the setting on the External Connector. Once the email has been sent successfully, then the E-Signature Log on the Rental Quote or Rental Contract is updated with a record that has a Status of Sent.

The Customer or Contact signs the document and the signed document is saved to the SharePoint or OneDrive folder as specified in the Archive Folder field on Rental Management Setup.

Then a link is added to the Rental Quote or Rental Contract in the Attachments fact box where the user can open and view the signed document.

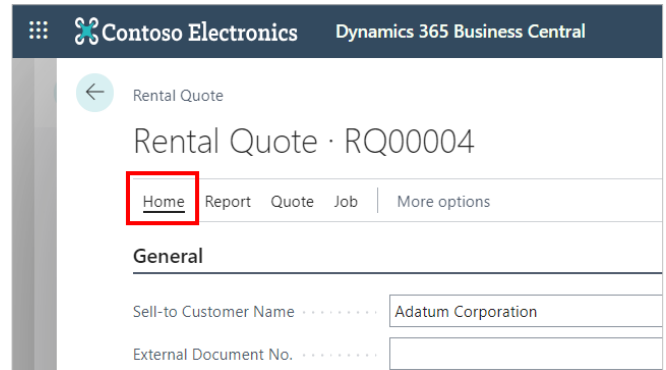
An E-Signature Log record with the Status of "Signed" is created, and the E-Signature Status is updated to "Signed" on the General tab of the document.

4.19.2.6.2. Sending a Rental Quote for Signing

The following demonstrates the sending of a Rental Quote for signing when on the Eternal Connector for DocuSign, E-Signature Settings the Send to Email Type is set to Customer.

The same process steps are used when from a Rental Contract the Send for Signing is ran.

Click on the navigation menu item popup **Home**



Contoso Electronics Dynamics 365 Business Central

Rental Quote

Rental Quote · RQ00004

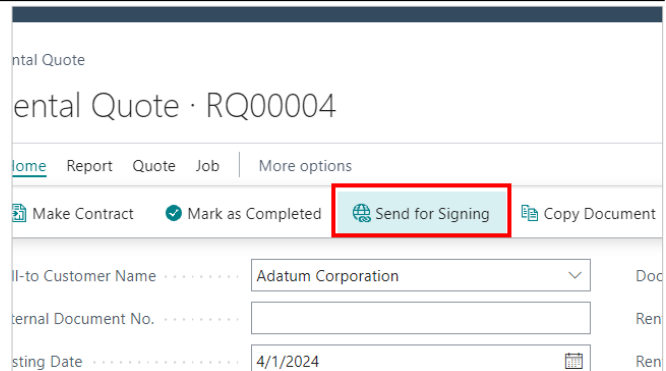
Home Report Quote Job More options

General

Sell-to Customer Name Adatum Corporation

External Document No.

Click on the navigation menu item **Send for Signing**



Rental Quote

Rental Quote · RQ00004

Home Report Quote Job More options

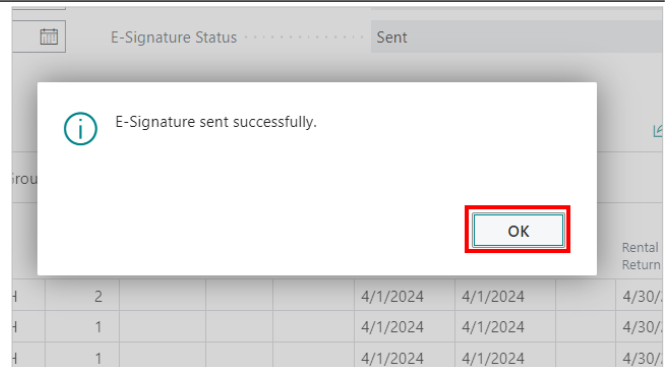
Make Contract Mark as Completed Send for Signing Copy Document

Sell-to Customer Name Adatum Corporation

External Document No.

Signing Date 4/1/2024

Click on the button **OK**



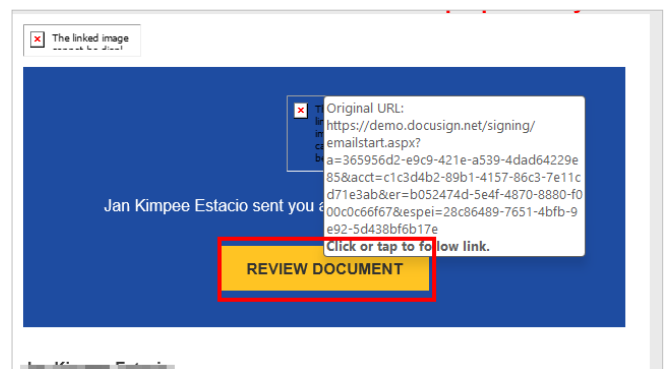
E-Signature Status Sent

E-Signature sent successfully.

OK

The following covers what the person who receives the email would do when the Send to Email Type is set to Customer.

Click on REVIEW DOCUMENT.



The linked image cannot be displayed. Your computer may not have enough memory to open the image, or the image may have been moved. Restart the computer, and then open this file again. If the red x still appears, you may have to delete the image and then insert it again.

Original URL:
https://demo.docusign.net/signing/emailstart.aspx?b=a=365956d2-e9c9-421e-a539-4dad64229e858&acct=c1c3d4b2-89b1-4157-86c3-7e11cd71e3ab&er=b052474d-5e4f-4870-8880-f000c0c66f78&espei=28c86489-7651-4bfb-9e92-5d438bf6b17e

Click or tap to follow link.

REVIEW DOCUMENT



Example of the DocuSign Document

Click on the column header **Description** I agree to use electronic records and signatures.

The box must be checked to be able to continue with the signing of the document.

- Click on CONTINUE
- Click on Sign

Signature Window

When Customer is specified in the DocuSign External Connector, then the About Your Signature Window opens and displays the Name of the Customers' company, with the Initials being created from the company name.

The Name and the Initials must be changed to be the name and initials of the person signing the document.

This will automatically create a Signature for the new name and update the signing Initials.

The person would then select ADOPT AND SIGN at the bottom of the About your Signature window. Then the person would select FINISH on the DocuSign page.



ODT Rentals Online Help

About Your Signature after Changing Name and Initials

The person will then receive an email advising the signing is completed which will have the signed document attached.

The file is saved to the Sharpoint or One Drive as per setups.

Then the filename with a link to the file is added to the Attachments - Links fact box.

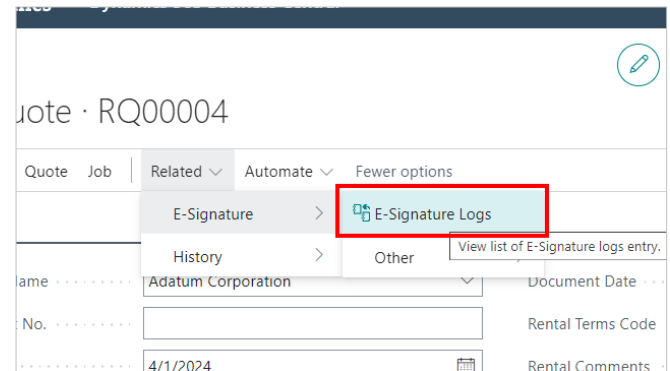
To view the file, click on the filename.

The following steps demonstrate reviewing the E-Signature Logs from the rental document.

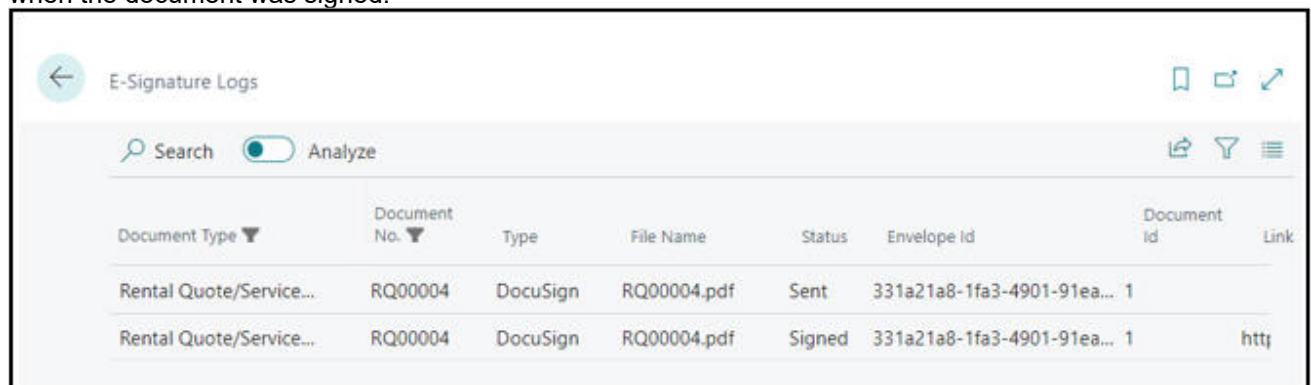
Click on the navigation menu item popup **Related**

Click on the navigation menu item popup **E-Signature**

Click on the navigation menu item **E-Signature Logs**



The following picture displays the e-signature records created when the document was sent for signing and when the document was signed.



Document Type	Document No.	Type	File Name	Status	Envelope Id	Document Id	Link
Rental Quote/Service...	RQ00004	DocuSign	RQ00004.pdf	Sent	331a21a8-1fa3-4901-91ea...	1	
Rental Quote/Service...	RQ00004	DocuSign	RQ00004.pdf	Signed	331a21a8-1fa3-4901-91ea...	1	http

4.20.Rental Categories and Attributes

4.20.1. Rental Categories and Attributes Overview

4.20.1.1. Overview

Rentals Categories and Rental Attributes are similar to the Dynamis 365 Business Central, item Categories and Attributes.

The Rental Category is equal to a general classification, i.e. excavators, which are user defined. Rental Categories can have Attributes and Attribute values assigned to the category.

When a Rental Category and/or Attributes are assigned to a Rental Unit Group, then the category and attributes assigned to the group will automatically populate all new and existing units assigned to the group.

The Rental Attributes feature provides the ability to specify differentiators and assign them directly to Rental Units with or without the attributes being assigned to a Rental Category.

When customers inquire about a rental product, either in correspondence or in an integrated web shop, they may ask or search according to characteristics, such as make and model. To provide this customer service, you can assign rental attribute values of different types to your rental units, which can then be used

when searching for rental product.

You can also assign rental attributes to rental categories, which then apply to the units that have a category specified.

The Rental Category card displays a fact box, which provides the ability to import and attach a picture to the Rental Category, attach documents, and add links and notes in the category fact box.

The Rental Category List contains a fact box, which has Details and Attachments options.

The Details option displays the Attributes and Attribute Values setup on the selected category card. The Attachments option contains the Links and Notes, which can be added to the selected category or displays the links and notes setup on the category card.

4.20.2. How to Set Up Rental Attributes

4.20.2.1. Overview

Rental Attributes of different types can be setup and assigned to the rental units, which can then be used when searching for rental units.

Rental Attributes can as well be assigned to Rental Categories, which will then apply to the units that have the Rental Category specified.

The following describes the fields and options available on the Rental Attributes card.

Command Bar Menu Options:

- Rental Attribute Values: This menu option opens another page where the user defines the values for the attribute when the type is set to Option.
- Translations: This menu option opens another page, where the user defines the language translations for the values set in the Rental Attribute Values page. The Rental Attribute Values and the Translations ribbon options can only be selected when the Type field is set to Option.

Attribute Card Fields:

- Name: In this field the user specifies the name of the attribute.
- Type: The Type field is used to specify the format of the attribute or whether the attribute will have user defined options.

When Integer or Decimal is selected in the Type field, then the field Unit of Measure is displayed for the user to define. If the type of Text, Integer or Decimal is selected, then the user will enter the value when assigning the attribute to a rental unit, and/or can assign values when an attribute is assigned to a category.

When the type is set to Option, then the user must specify the values that will be available for the user to select from when assigning the Attribute to a rental unit and/or when assigning the Attribute to a rental category.

• Values

When the Type of Option exists on one of the Attributes, then the Attribute Values assigned to the Attribute will be displayed in this field.

• Blocked

This field is used to specify that the attribute can no longer to be used and prevents the assignment of the attribute to a rental unit or rental category.



The following describes the fields available on the Rental Attribute Values card fields:
Value:

- The user defines the values that are applicable to the Attribute. When assigning the Rental Attribute to a Rental Unit and/or Rental Category, then the user will select one of the defined values from a list of the values specified here.

Blocked

- This field is used to specify that the attribute value can no longer to be used and prevents the assignment of the attribute value to a rental unit or rental category.

To learn how to assign Rental Attributes to Rental Categories, see the ODT Rentals Online help, Additional Rental Processes, Rental Categories and Attributes - How to Set Up Rental Categories.

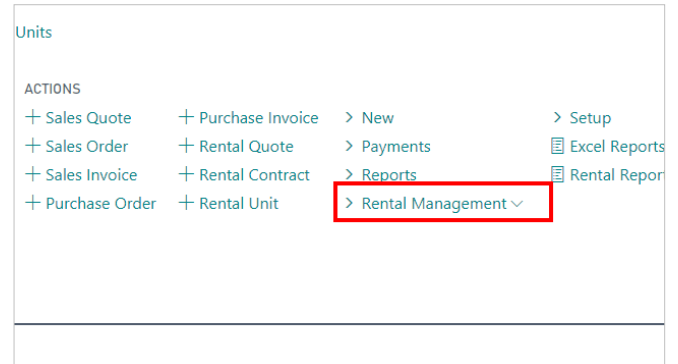
4.20.2.2. How to Setup Attributes

Profile - Business Manager

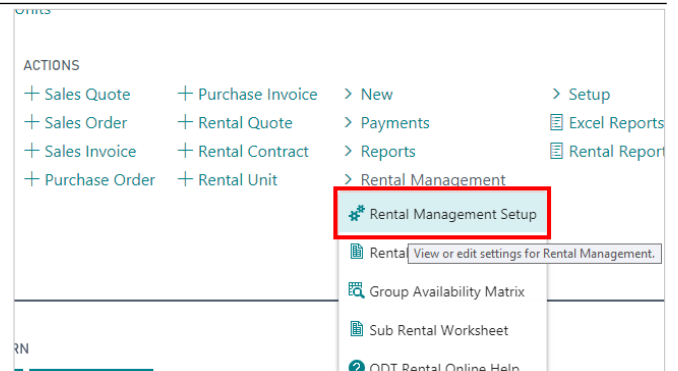
Users setting up the Rental Categories and Attributes, when assigned the Sales Order Processor Profile, need to use the Search to locate and open Rental Management Setup.

The following demonstrates how to access the Rental Attributes to setup new attributes.

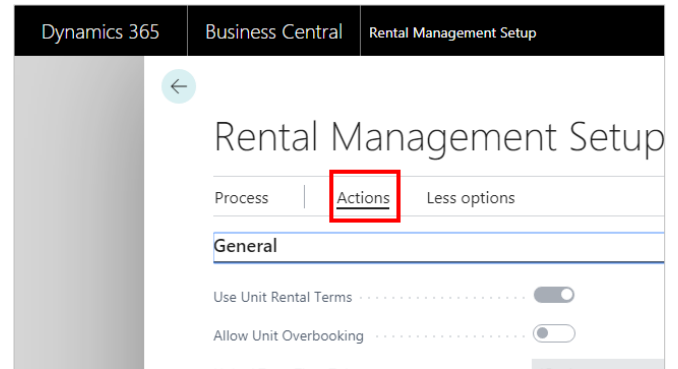
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**

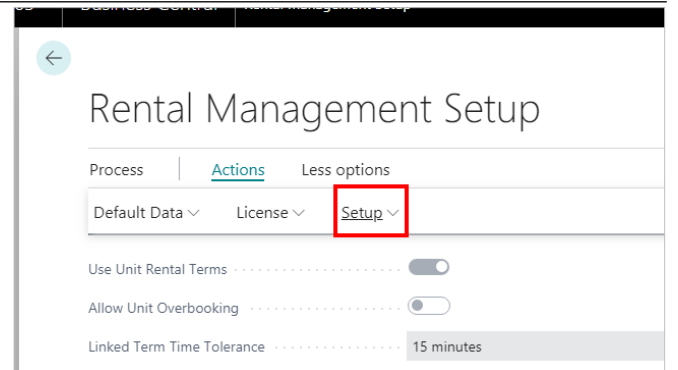


Click on the navigation menu item popup **Actions**



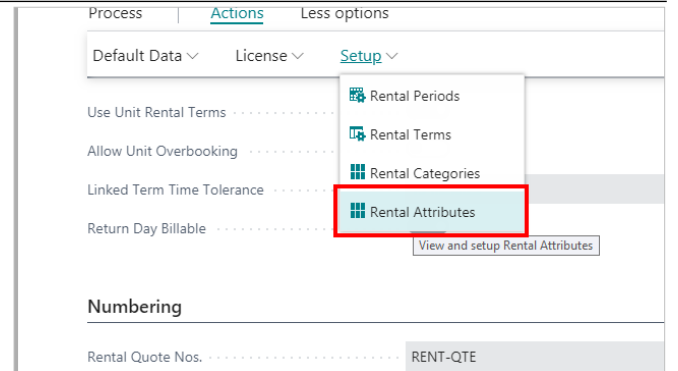
The screenshot shows the 'Rental Management Setup' page. The 'Process' tab is selected, and the 'Actions' sub-tab is highlighted with a red box. Below the tabs, the 'General' section is visible, showing options like 'Use Unit Rental Terms' and 'Allow Unit Overbooking'.

Click on the navigation menu item popup **Setup**



The screenshot shows the 'Rental Management Setup' page. The 'Process' tab is selected, and the 'Setup' sub-tab is highlighted with a red box. Below the tabs, the 'General' section is visible, showing options like 'Use Unit Rental Terms' and 'Allow Unit Overbooking'.

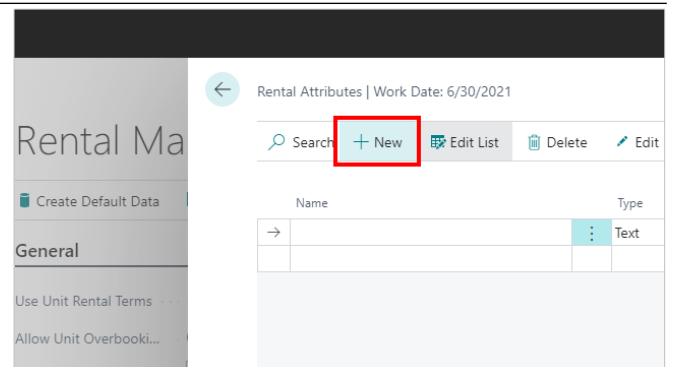
Click on the navigation menu item **Rental Attributes**



The screenshot shows the 'Rental Management Setup' page. The 'Process' tab is selected, and the 'Setup' sub-tab is highlighted. A dropdown menu is open, showing options like 'Rental Periods', 'Rental Terms', 'Rental Categories', and 'Rental Attributes'. The 'Rental Attributes' option is highlighted with a red box.

The following examples demonstrate the setup of a Rental Attributes for the type of Text.

Click on the navigation menu item **New**



The screenshot shows the 'Rental Attributes' page. The 'New' button is highlighted with a red box. Below the button, a table is visible with columns for 'Name' and 'Type'. The 'Type' column shows 'Text'.



Click on the field **Name**

The screenshot shows the 'Rental Attribute' form. The 'Name' field is highlighted with a red box. The form includes a 'Translations' tab and a 'More options' section. The 'Name' field is currently empty.

Enter the text **Make**.

The screenshot shows the 'Rental Attribute' form. The 'Name' field now contains the text 'Make' and is highlighted with a red box. The form includes a 'Translations' tab and a 'More options' section.

Click on the field **Type**

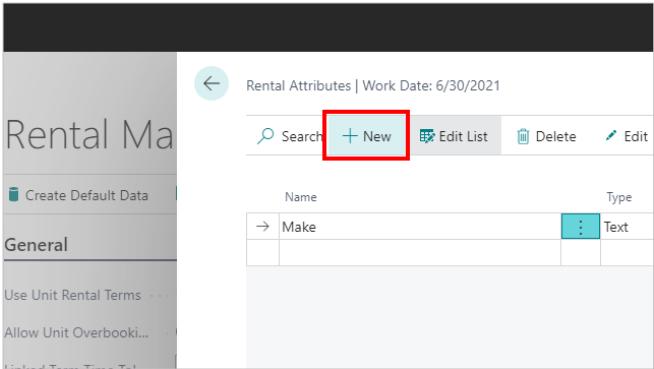
Accept the Type of Text as displayed in the field.

The screenshot shows the 'Rental Attribute' form. The 'Type' field is highlighted with a red box. The 'Name' field contains the text 'Make'. The form includes a 'Translations' tab and a 'More options' section.

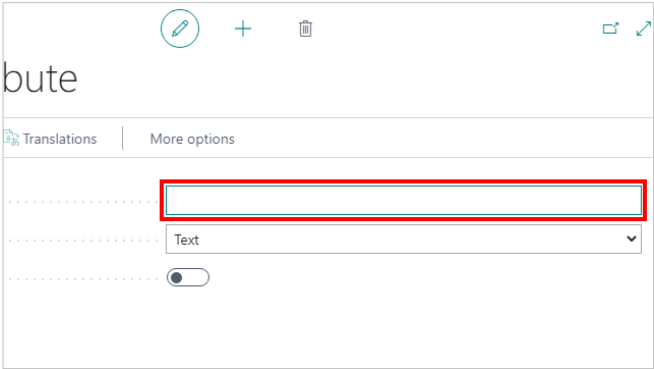
Click on the back button

The screenshot shows the 'Rental Attribute' form. The back button is highlighted with a red box. The form includes a 'Translations' tab and a 'More options' section. The 'Name' field contains the text 'Make'.

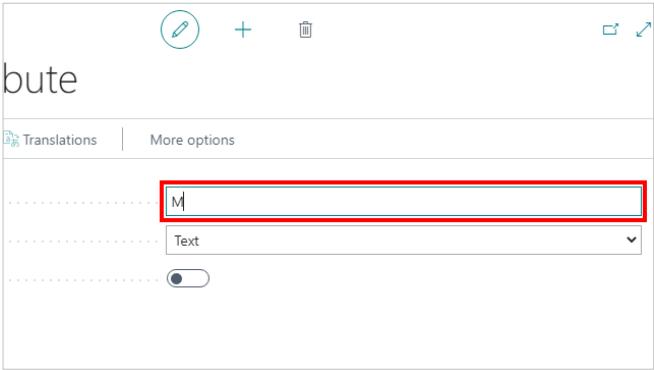
Click on the navigation menu item **New**



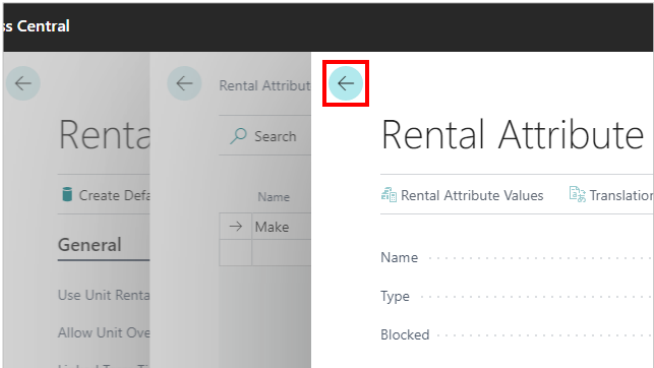
Click on the field **Name**



Enter the text **Model**.



Click on the back button



The following example demonstrates setting up an Attribute with a Type of Option.



ODT Rentals Online Help

Click on the navigation menu item **New**

Rental Attributes | Work Date: 6/30/2021

Search + New Edit List Delete Edit

Name	Type
Make	Text
Model	Text

Click on the field **Name**

bute

Translations More options

Text

Click on the field **Name**

bute

Translations More options

Text

Enter the text **Fuel**.

bute

Translations More options

PE-MONTH

Trey Research

SRU00002

8/25/2021



Click on the field **Type**

Click on the item **Option** in the list

Click on the navigation menu item **Rental Attribute Values**

Click on the cell **Value**



Enter the text **Gasoline**.

Fuel | Work Date: 6/30/2021

Rental Attribute Values | Search + New Edit List Delete

	Value
→	d

Click on the cell **Value**

Fuel | Work Date: 6/30/2021

Rental Attribute Values | Search + New Edit List Delete

	Value
→	Gasoline

Enter the text **Deisel**.

Fuel | Work Date: 6/30/2021

Rental Attribute Values | Search + New Edit List Delete

	Value
	Gasoline
→	d

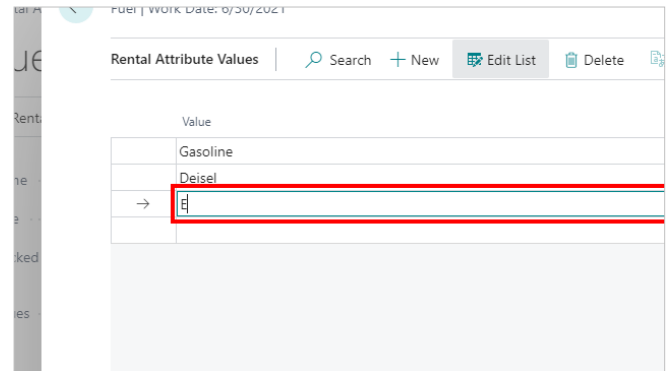
Click on the cell **Value**

Fuel | Work Date: 6/30/2021

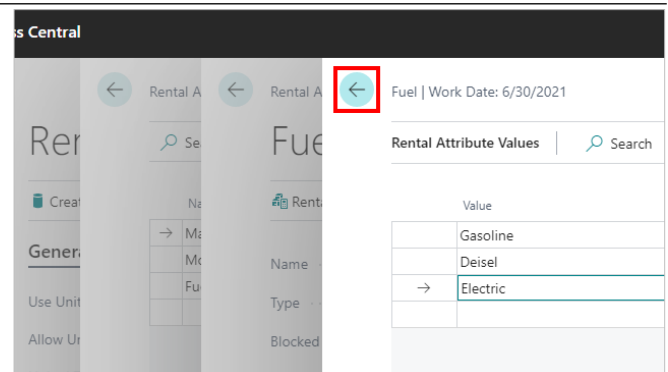
Rental Attribute Values | Search + New Edit List Delete

	Value
	Gasoline
→	Deisel

Enter the text **Electric**.

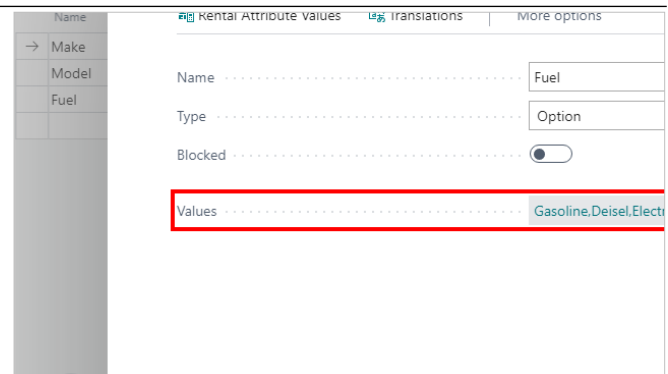


Click on the back button



Click on **Values Gasoline,Deisel,Electric**

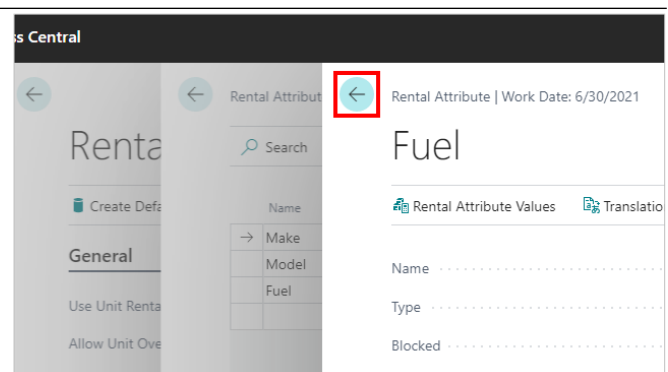
Notice that the Values field is now populated with the Attribute Values that were setup.



The following example demonstrates the setup of a Rental Attribute with the Type set to Decimal.

The same steps will apply to when the type Integer is selected.

Click on the back button





Click on the navigation menu item **New**

Rental Attributes | Work Date: 6/30/2021

Search + New Edit List Delete Edit

Name	Type
Make	Text
Model	Text
Fuel	Option

Click on the field **Name**

bute

Translations More options

Text

Enter **Name**.

bute

Translations More options

Text

Click on the field **Type**

bute

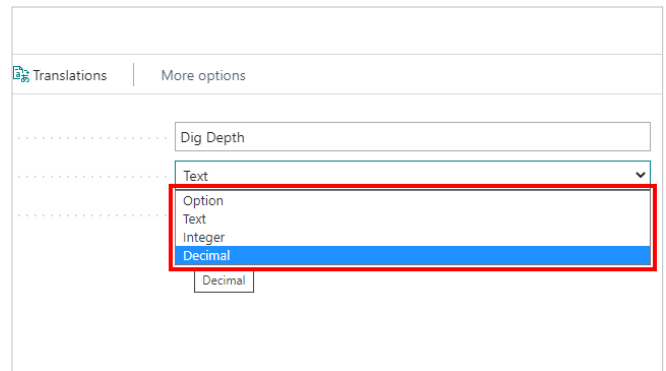
Translations More options

Dig Depth

Text

ODT Rentals Online Help

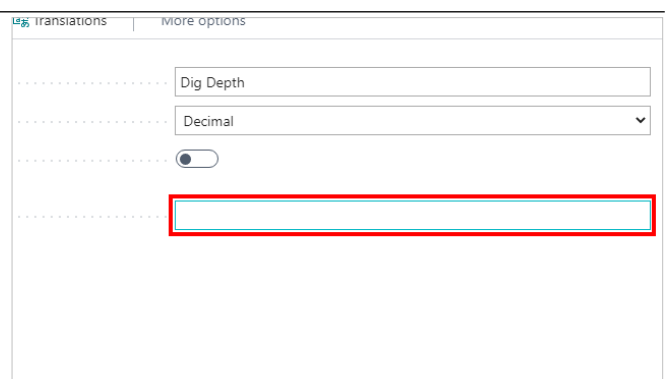
Click on the item **Decimal** in the list



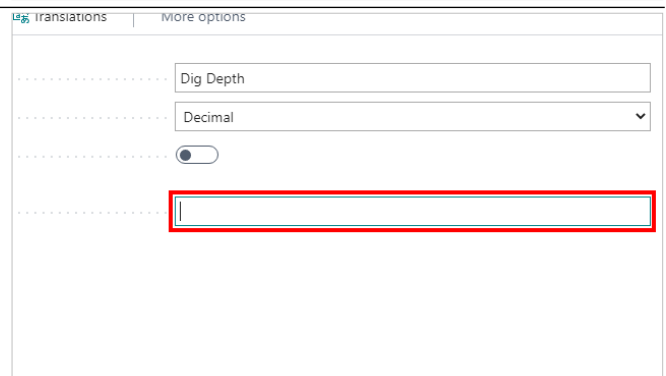
The Unit of Measure field is not displayed by default.
The field is automatically displayed when either of the
Type of Decimal or Integer is selected.

Click on the field **Unit of Measure**

Enter the unit of measure that applies to the attribute.

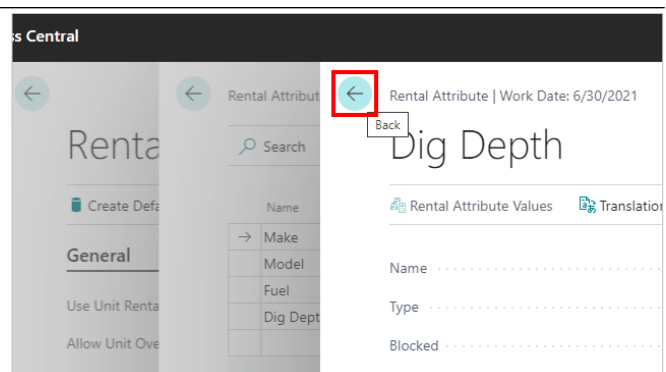


Enter the text **Feet**.



Should the options require translations to other
languages, select the Translations menu option and
enter the translations for each value setup, as
needed.

Click on the back button



4.20.2.3. How to Assign Rental Attributes to Rental Units

The following example demonstrates adding Rental

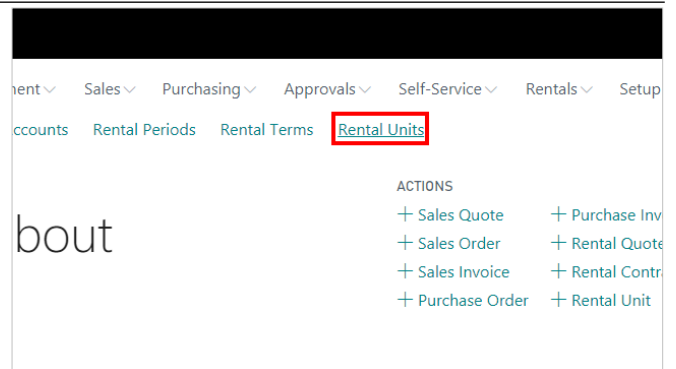


Attributes to a Rental Unit.

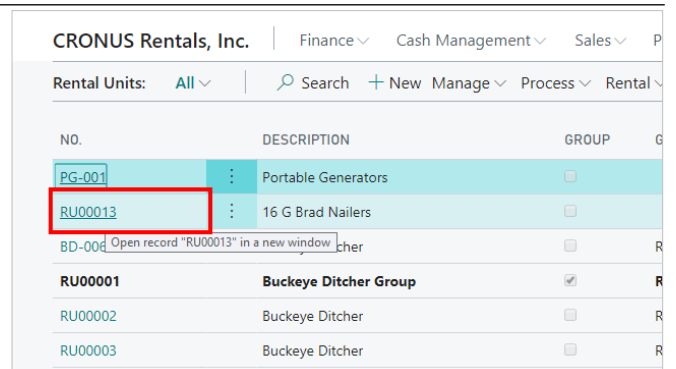
NOTE

Currently when Rental Attributes are assigned directly to a Rental Unit Group, the attributes do not default to the units that are linked to the group.

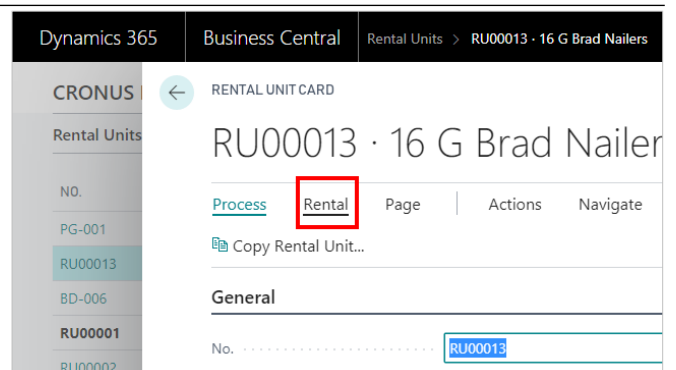
Click on the navigation menu item **Rental Units**



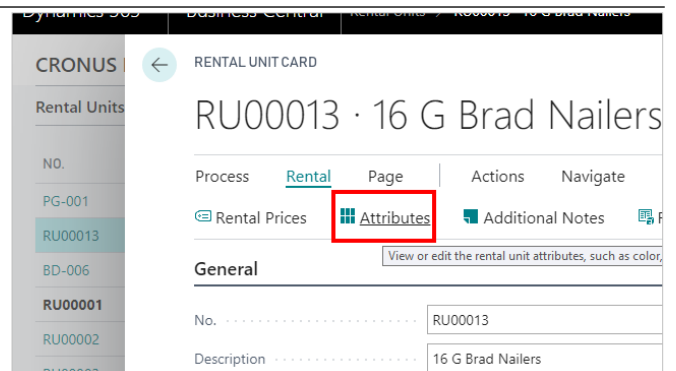
Click on the link in cell **No.** with the value **RU00013**



Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Attributes**



Click on the cell **Attribute**



EDIT = RENTALATTRIBUTE VALUES = RU00013-16 G BRAD NAILERS

Rental Attribute Values | Manage

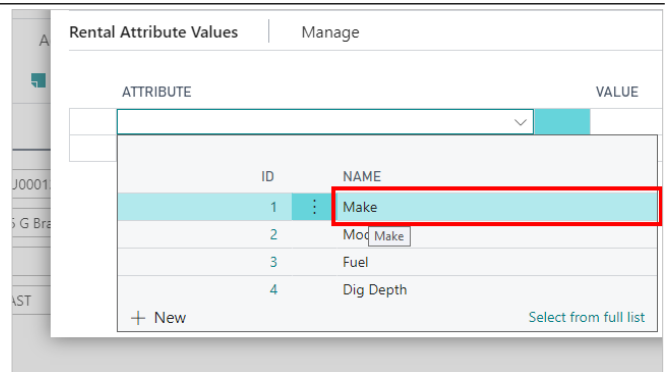
ATTRIBUTE

VALUE

RU00013

16 G Brad

Click on the cell **Name** with the value **Make**



Rental Attribute Values | Manage

ATTRIBUTE

VALUE

ID NAME

1 Make

2 Mod Make

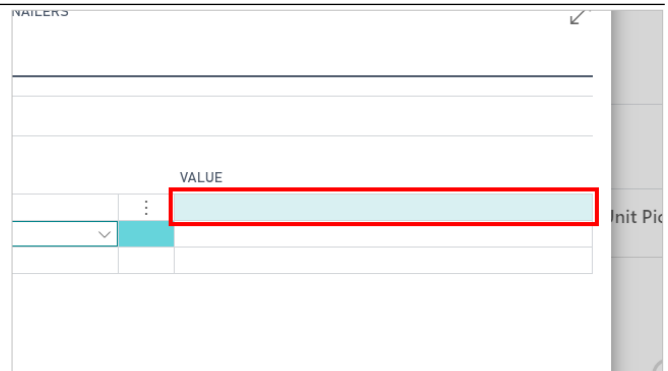
3 Fuel

4 Dig Depth

+ New

Select from full list

Click on the cell **Value**



VALUE

VALUE

Enter the text **Ryobi**.

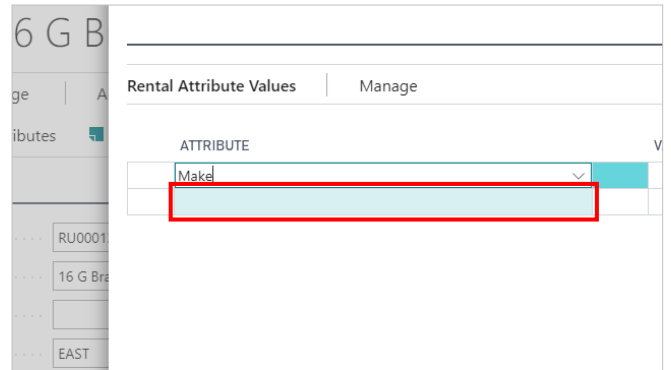


VALUE

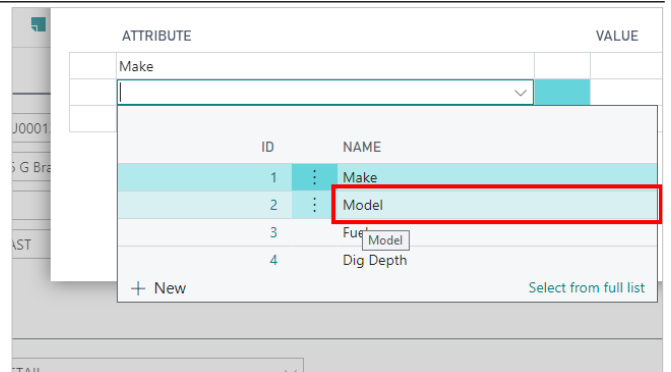
VALUE

Ryobi

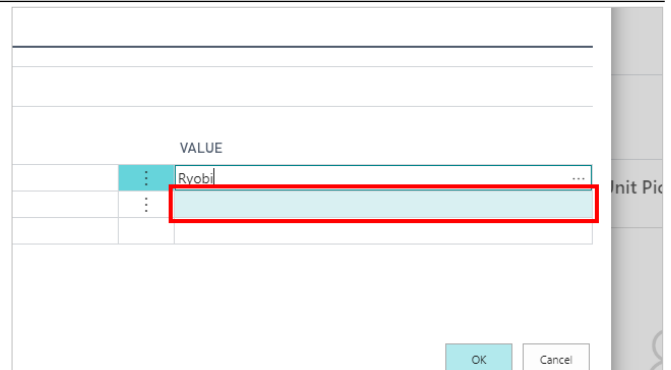
Click on the cell **Attribute**



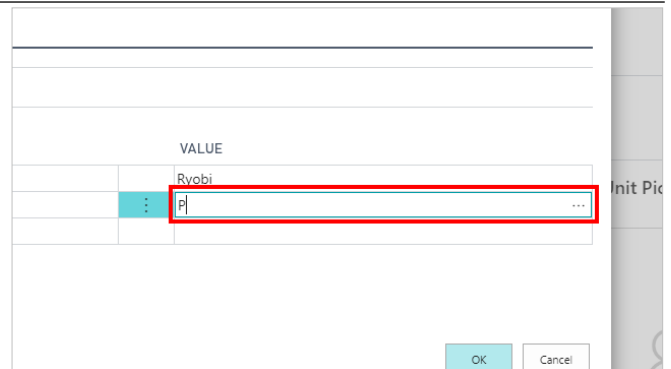
Click on the cell **Name** with the value **Model**



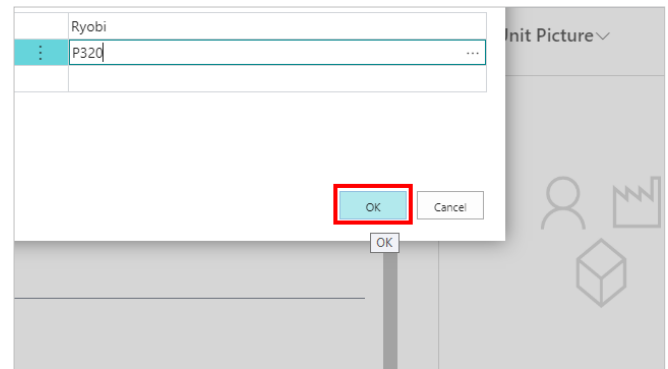
Click on the cell **Value**



Enter the text **P320**.



Click on the button **OK**



4.20.3. How to Set Up Rental Categories

4.20.3.1. Overview

The Rental Category is for sorting your equipment into logical groups to make managing and tracking your rental fleet easier. Categories are user-defined and can be configured in a hierarchal manner.

For example:

- Tools, being the highest parent category
- Nailers, being a child of the Tools category
- Brad Nailers, being a child category of Nailers
- Framing Nailers, being another child category of Nailers

The applicable Rental Category is entered on the Rental Unit card. Should the category be added to a Rental Unit Group card, then all units linked to the group will automatically be updated with the same category.

Rental Attributes can be assigned to the Rental Categories. This enables the assignment of key features of the unit. The specific attribute values can be added or overridden if defaults

When attributes are assigned to the highest parent category, then they will default to the child category. If the child category has other sub categories and additional attributes are assigned to the child category they will default to the sub categories.

For example:

Tools has Rental Attributes called Make and Model assigned.

Nailers will automatically have the Attributes of Make and Model assigned. The Nailers category has an Attribute of Energy Source added to it.

Brad Nailers and Framing Nailers categories will automatically have the attributes of Make, Model and Energy Source assigned.

Thus if a Rental Unit, which is a Brad Nailer, has the Rental Category of Brad Nailers assigned, then the attributes noted above will automatically be available on the unit. Users can then assign the specific values that apply to the unit.

4.20.3.2. How to Setup Rental Categories

Profile - Business Manager

Should the user responsible for setting up the Rental Categories and Attributes be assigned the Sales Order Processor Profile, then the user will need to use the Search to locate and open Rental Management Setup to setup Rental Categories and Attributes.

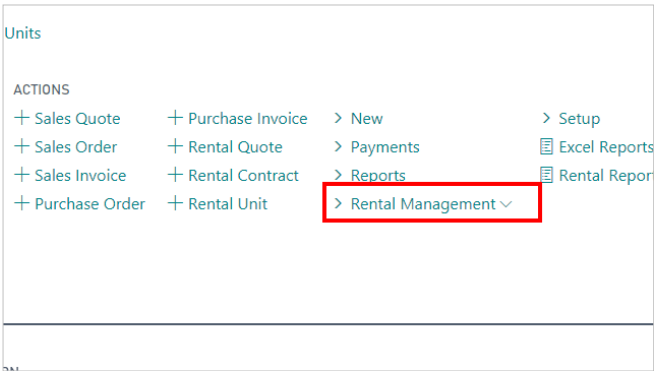


The following example demonstrates the setup of the Rental Categories as noted in the hierarchal example in the Overview chapter.
For example:

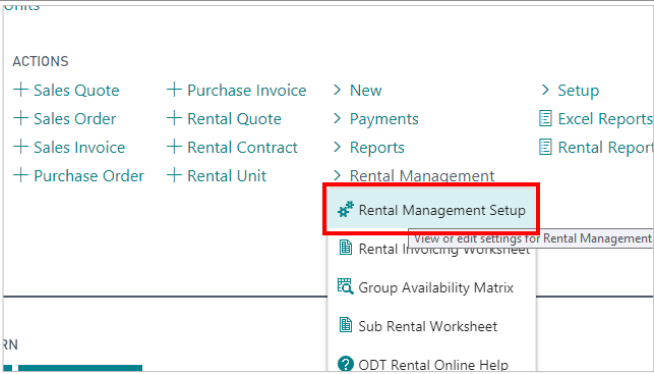
- Tools has Rental Attributes called Make and Model assigned.
- Nailers will automatically have the Attributes of Make and Model assigned. The Nailers category has an Attribute of Energy Source added to it.
- Brad Nailers and Framing Nailers categories will automatically have the attributes of Make, Model and Energy Source assigned.

Thus if a Rental Unit, which is a Brad Nailer, has the Rental Category of Brad Nailers assigned, then the attributes noted above will automatically be available on the unit. Users can then assign the specific values that apply to the unit.

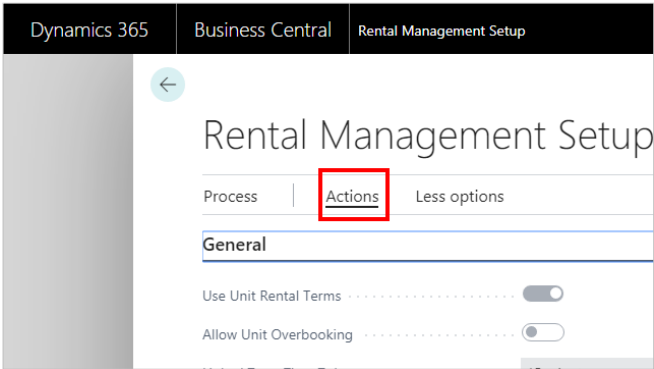
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **Rental Management Setup**



Click on the navigation menu item popup **Actions**





Click on the navigation menu item popup **Setup**

The screenshot shows the 'Rental Management Setup' page. At the top, there are tabs for 'Process', 'Actions', and 'Less options'. Below these, there are three dropdown menus: 'Default Data', 'License', and 'Setup'. The 'Setup' dropdown is highlighted with a red box. Below the dropdowns, there are several settings with toggle switches: 'Use Unit Rental Terms', 'Allow Unit Overbooking', and 'Linked Term Time Tolerance' (set to 15 minutes).

Click on the navigation menu item **Rental Categories**

The screenshot shows the 'Rental Management Setup' page with the 'Setup' dropdown menu open. The 'Rental Categories' option is highlighted with a red box. Other options in the dropdown include 'Rental Periods', 'Rental Terms', and 'Rental Alternatives'. A link 'View and setup Rental Categories' is also visible.

Click on the navigation menu item **New**

The screenshot shows the 'Rental Categories' page. At the top, there are tabs for 'Dynamics 365', 'Business Central', and 'Rental Management Setup > Rental Categories'. Below the tabs, there are buttons for '+ New', 'Edit List', 'Delete', 'Manage', and 'O'. The '+ New' button is highlighted with a red box. Below the buttons, there is a text input field with the placeholder 'Create a new entry. CODE'.

Click on the field **Code**

The screenshot shows a 'Card' form. At the top, there are icons for edit, add, and delete. Below the icons, there is a section titled 'Card'. Under this section, there is a text input field with a red asterisk and a red box around it, indicating it is a required field. Below the input field, there is a placeholder text 'Please fill out this field.'.



Enter the text **Tools**.

ard

* [Tools]

NOTE:

The Parent Category field is not to be populated when the category being created is the top-level category.

Click on the field **Description**

ard

* Tools

Enter the text **Tools**.

ard

TOOLS

Click on the back button

Dynamics 365 Business Central Rental Management Setup > Rental Category

Back TOOLS

Process | Navigate Less options

Code

Parent Category

Description



Click on the navigation menu item **New**

Dynamics 365 Business Central Rental Management Setup > Rental Categories

Rental Categories

+ New

Edit List

Delete

Manage

More

Create a new entry.

CODE

TOOLS

Click on the field **Code**

ard

*

Please fill out this field.

Enter the text **Nailers**.

ard

*

N

Click on the field **Parent Category**

ard

*

Nailers



ODT Rentals Online Help

Click on **Code = TOOLS**, **Description = Tools**

Less options

NAILERS

CODE DESCRIPTION

TOOLS Tools

+ New Select record "TOOLS"

Click on the field **Description**

NAILERS

TOOLS

Enter the text **Nailers**.

NAILERS

TOOLS

N

Click on the back button

Dynamics 365 Business Central NAILERS

← RENTAL CATEGORY CARD

Back

NAILERS

Process | Navigate | Less options

Code

Parent Category

Description



Click on the navigation menu item **New**

Dynamics 365 Business Central Rental Management Setup > Rental Categories

Rental Categories

+ New Edit List Delete Manage On

Create a new entry.
CODE

TOOLS
NAILERS

Click on the field **Code**

ard

* [Redacted field]

Please fill out this field.

Enter the text **Brad Nailers**.

ard

* [Redacted field]

Click on the field **Parent Category**

ard

* Brad Nailers

[Redacted field]



ODT Rentals Online Help

Click on **Code = NAILERS**, **Description = Nailers**

CODE	DESCRIPTION
TOOLS	Tools
NAILERS	Nailers

+ Select record "NAILERS"

Click on the field **Description**

BRAD NAILERS

NAILERS

Enter the text **Brad Nailers**.

BRAD NAILERS

NAILERS

Brad Nailers

Click on the back button

Dynamics 365 Business Central Rental Management Setup > Rental Category

RENTAL CATEGORY CARD

Back BRAD NAILERS

Process | Navigate | Less options

Code

Parent Category

Description



Click on the navigation menu item **New**

Dynamics 365Business CentralRental Management Setup > Rental Categories

X Want to go back?

←

←

Rental Categories

+ New

Edit List

Delete

Manage

X O

Create a new entry.

CODE

TOOLS

NAILERS

BRAD NAILERS

Click on the field **Code**

ard

Ⓜ

+

🗑

*

Please fill out this field.

Enter the text **Framing Nailers**.

ard

Ⓜ

+

🗑

*

F

Click on the field **Parent Category**

S

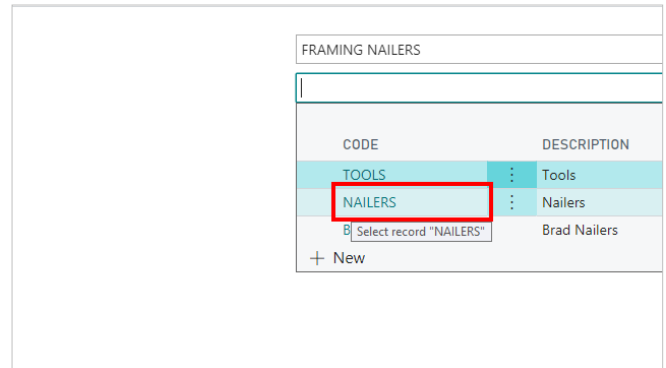
Ⓜ

+

🗑

FRAMING NAILERS

Click on **Code = NAILERS**, **Description = Nailers**

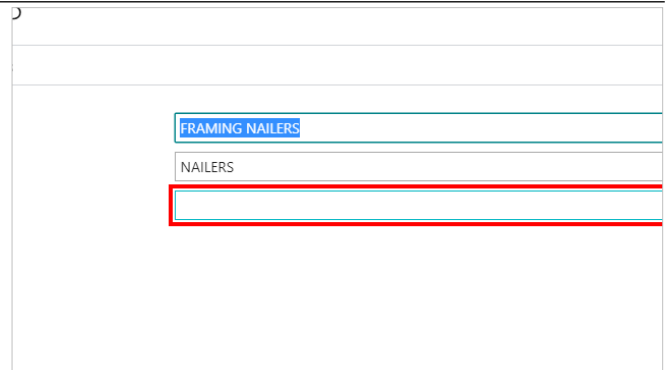


CODE	DESCRIPTION
TOOLS	Tools
NAILERS	Nailers
	Brad Nailers

Select record "NAILERS"

+ New

Click on the field **Description**



FRAMING NAILERS

NAILERS

Enter the text **Framing Nailers**.

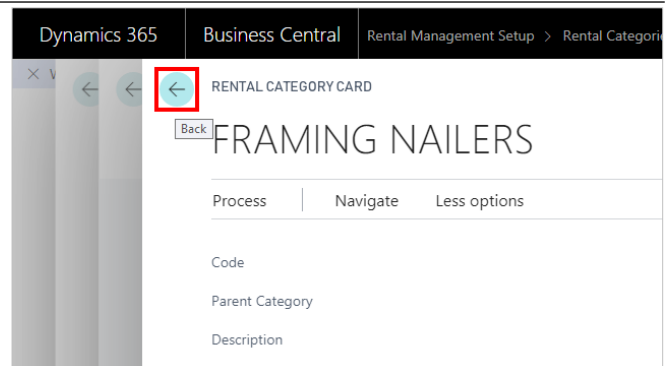


FRAMING NAILERS

NAILERS

Framing Nailers

Click on the back button



Dynamics 365 Business Central Rental Management Setup > Rental Category

RENTAL CATEGORY CARD

Back

FRAMING NAILERS

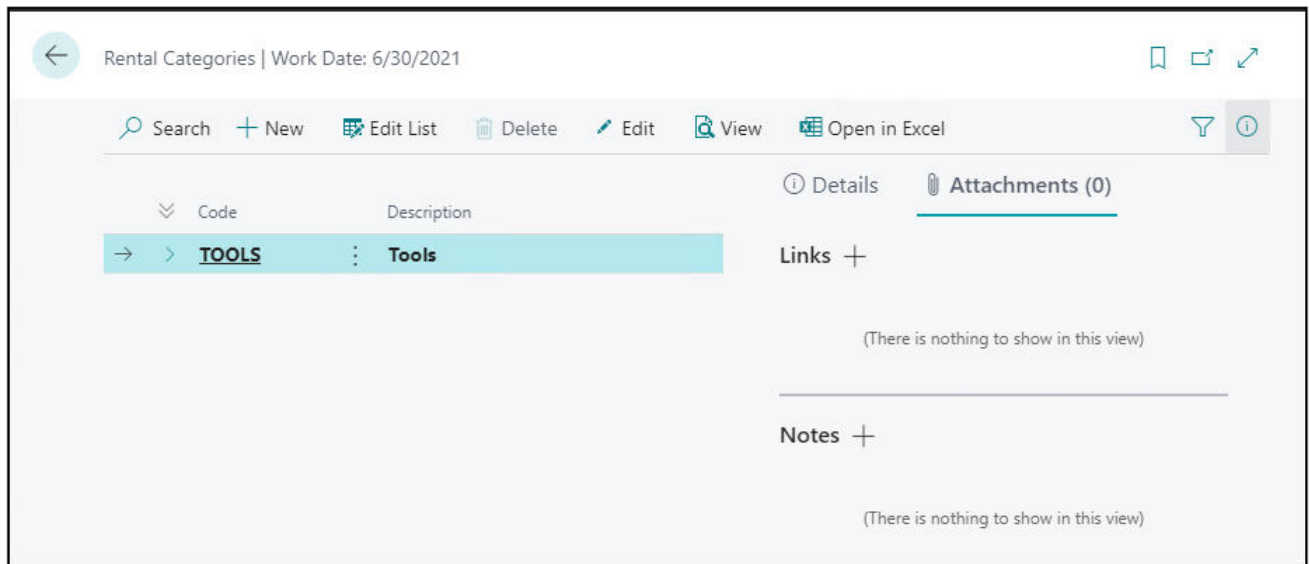
Process | Navigate | Less options

Code

Parent Category

Description

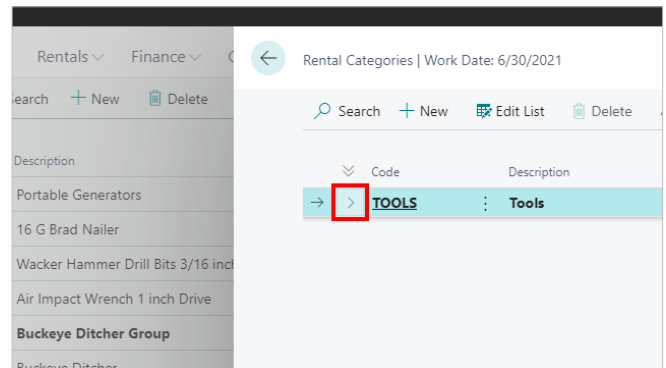
The following picture displays the Rental Category list with the list collapsed. When the list is collapsed only the top level categories that do not have a Parent Category specified are displayed.



The following steps demonstrate how to expand and collapse the list.

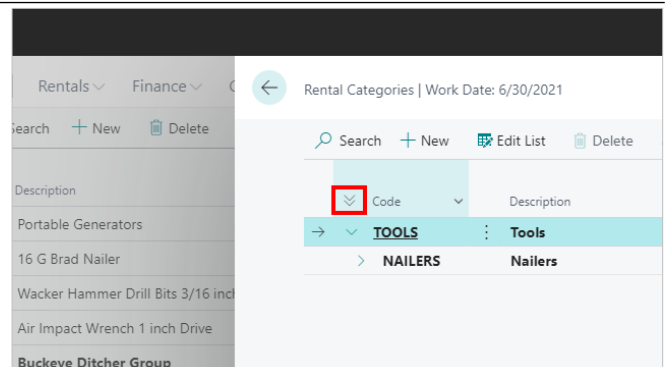
Click on the button **Expand / Collapse row**

When the Expand/Collapse is selected the list will be expanded or collapsed to show the Parent Categories only.

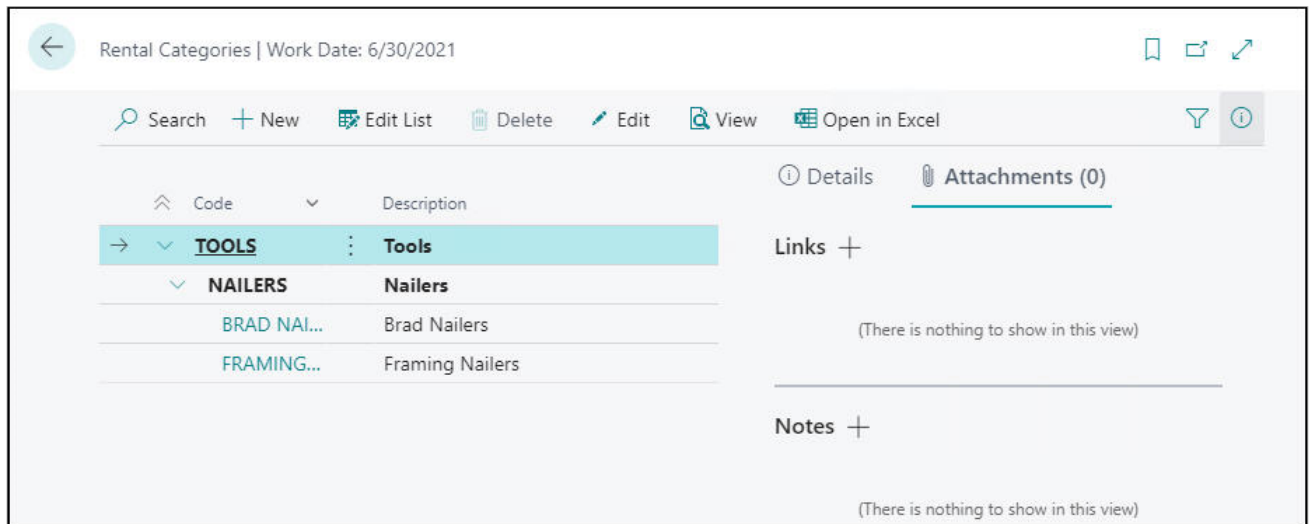


Click on the button **Toggle Expand / Collapse All**

When the Expand/Collapse All is selected, then all categories will be displayed.



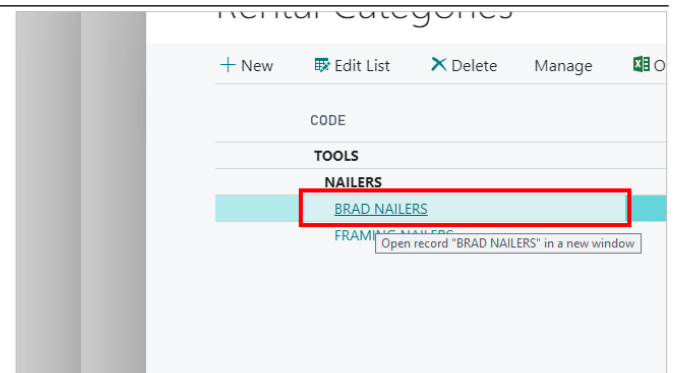
The following displays the Rental Categories list fully expanded.



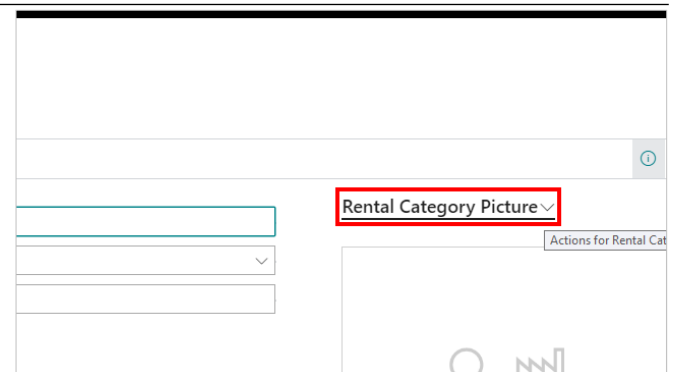
4.20.3.3. How to Add a Picture to a Rental Category

The following demonstrates adding a picture to a Rental Category.

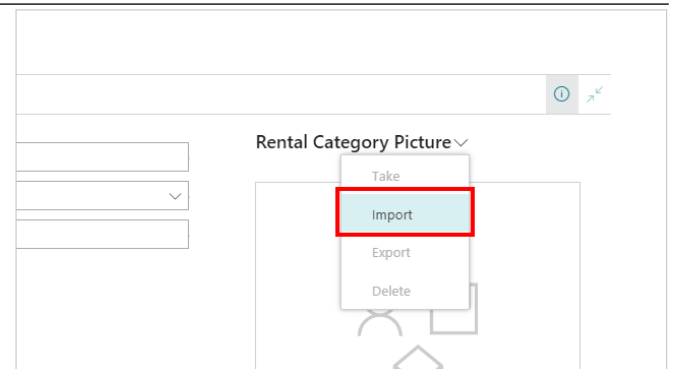
Click on the link in cell **Code** with the value **BRAD NAILERS**



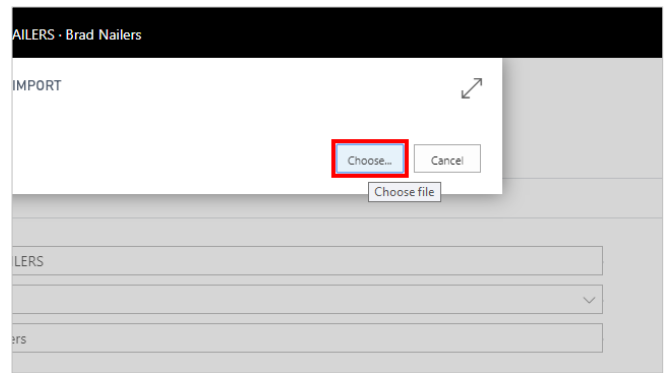
Click on the link **Rental Category Picture**



Click on the menu item **Import**



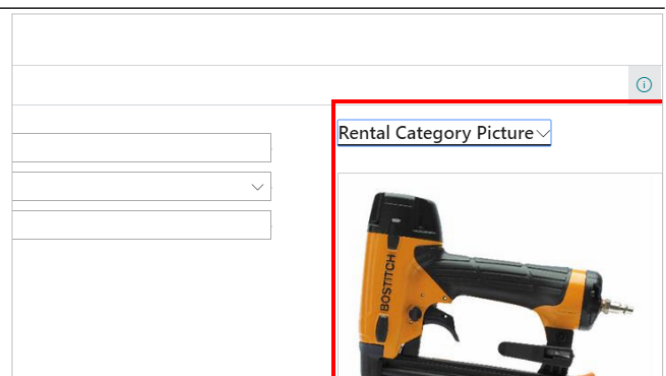
Click on the field **Choose**



Browse to where the picture to be imported is located, select the file, and then select open.

Click on **Rental Category Picture**

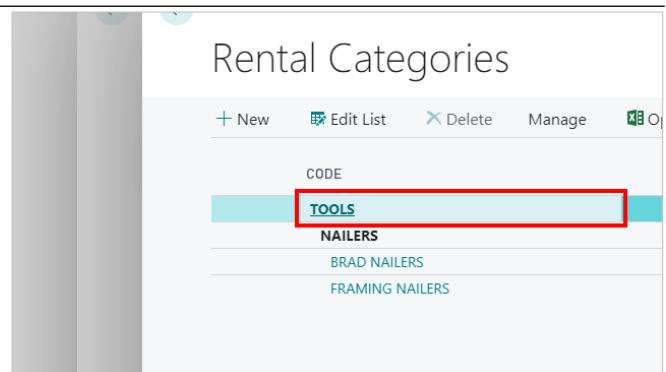
The picture is imported and displayed on the right side of the Rental Category card.



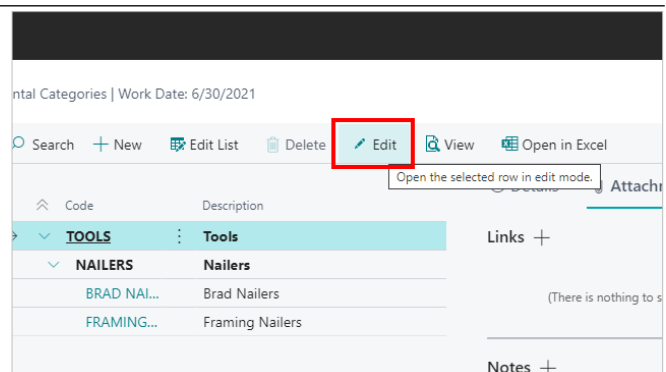
4.20.3.4. How to Assign Rental Attributes to Rental Categories

The following example demonstrates the assignment of Rental Attributes to the Categories as noted in the example in the Overview chapter.

Click on the link in cell **Code** with the value **TOOLS**



Click on the navigation menu item **Edit**





Click on the navigation menu item **Attributes**

Rental Categories | Work Date: 6/30/2021

Search + New

Code

TOOLS

NAILERS

BRAD NAI...

FRAMING...

TOOLS · Tools

Delete Attributes More options

Code TOOLS

Parent Category

Description Tools

Click on the cell **Attribute**

Business Central Rental Management Setup > Rental Categories > TOOLS · Tools

NTAL CATEGORY CARD

TOOLS · Tools

Access Navigate Less options

Delete Attributes

Parent Category

Description

EDIT - RENTAL CATEGORY ATTRIBUTES

ATTRIBUTE

Click on the cell **Name** with the value **Make**

EDIT - RENTAL CATEGORY ATTRIBUTES

ATTRIBUTE	VALUE
ID	NAME
1	Make
2	Mo Make
4	Dig Depth
5	Guage
6	Fuel

+ New Select from full list

Click on the cell **Attribute**

Business Central Rental Management Setup > Rental Categories > TOOLS · Tools

NTAL CATEGORY CARD

TOOLS · Tools

Access Navigate Less options

Delete Attributes

Parent Category

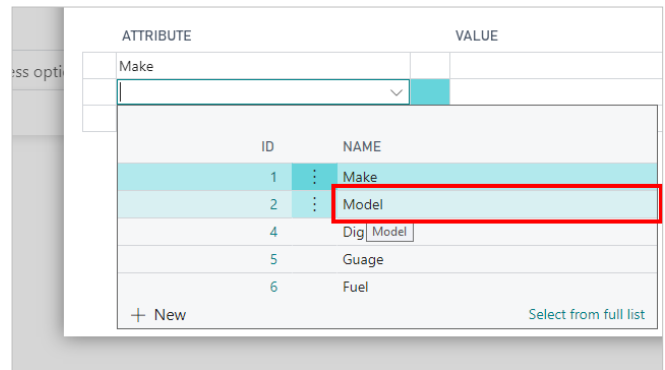
Description

EDIT - RENTAL CATEGORY ATTRIBUTES

ATTRIBUTE

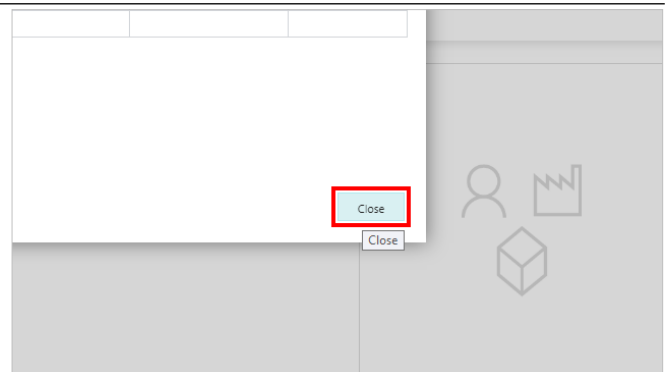
Make

Click on the cell **Name** with the value **Model**



ATTRIBUTE	VALUE
Make	
▼	
ID	NAME
1	Make
2	Model
4	Dig[Model]
5	Guage
6	Fuel
+ New	
Select from full list	

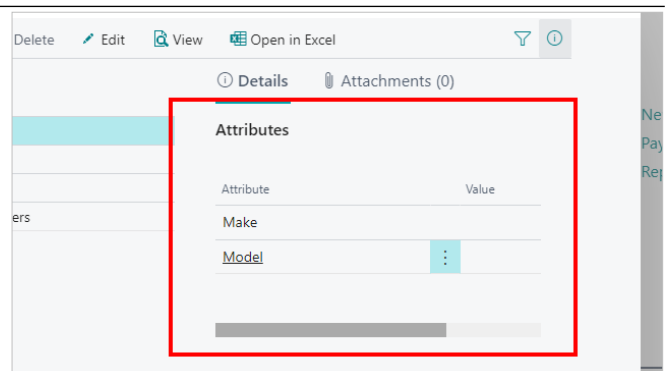
Click on the button **Close**



Close

Click on **Attributes**

Note that the Attributes assigned to the Tool category are now displayed in the Attributes fact box.



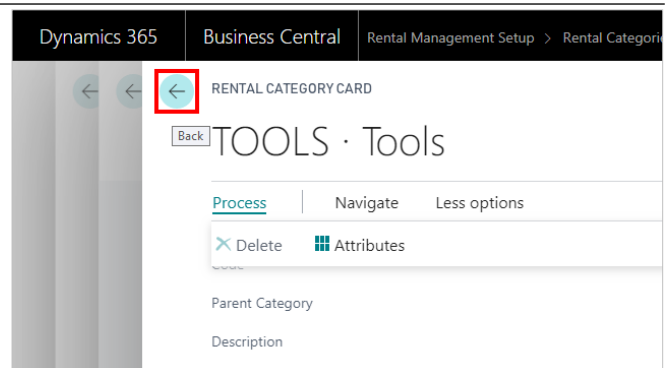
Delete Edit View Open in Excel

Details Attachments (0)

Attributes

Attribute	Value
Make	
Model	⋮

Click on the back button



Dynamics 365 Business Central Rental Management Setup > Rental Category

RENTAL CATEGORY CARD

Back

TOOLS · Tools

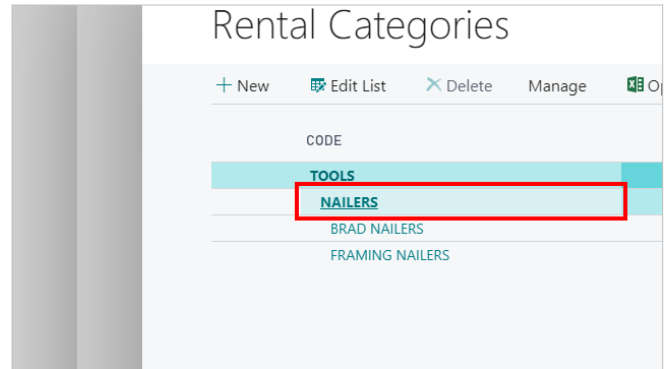
Process Navigate Less options

Delete Attributes

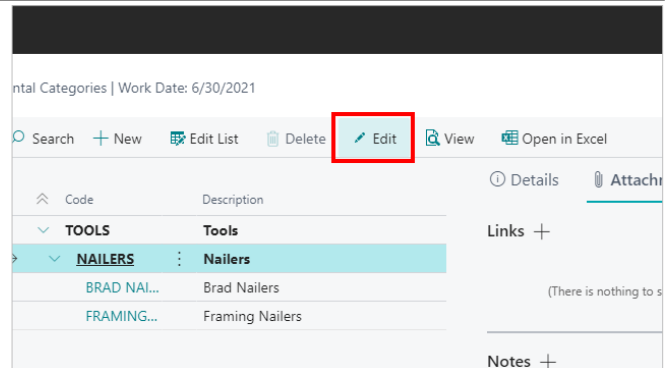
Parent Category

Description

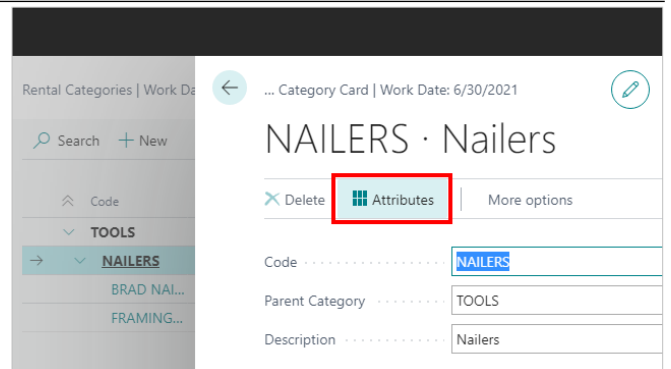
Click on the link in cell **Code** with the value **NAILERS**



Click on the navigation menu item **Edit**

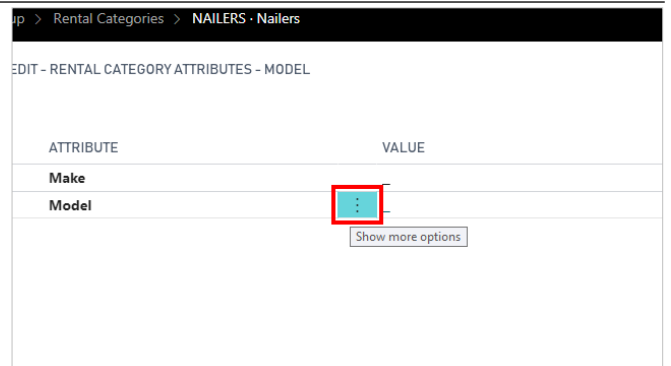


Click on the navigation menu item **Attributes**

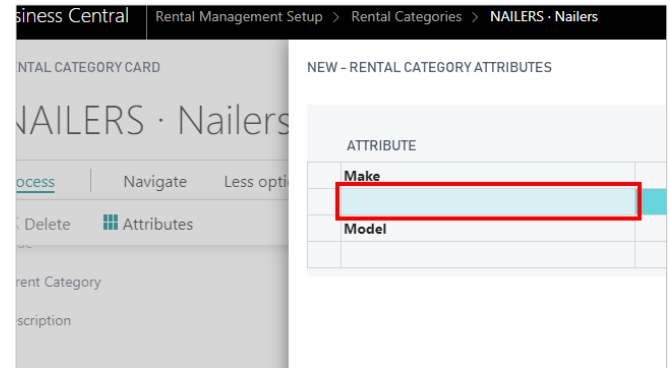


Click on the row menu button

Select New Line.



Click on the cell **Attribute**

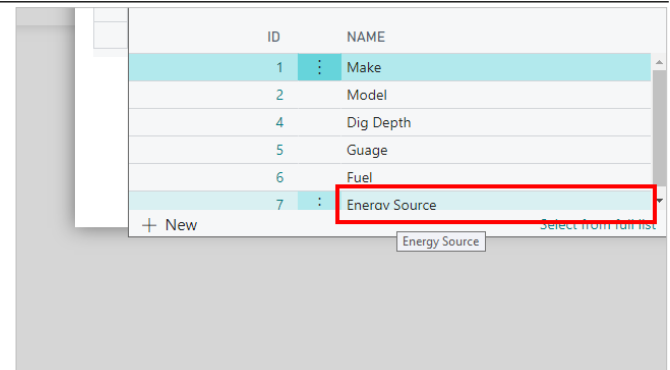


Business Central | Rental Management Setup > Rental Categories > NAILERS · Nailers

NEW - RENTAL CATEGORY ATTRIBUTES

ATTRIBUTE
Make
Model

Click on the cell **Name** with the value **Energy Source**

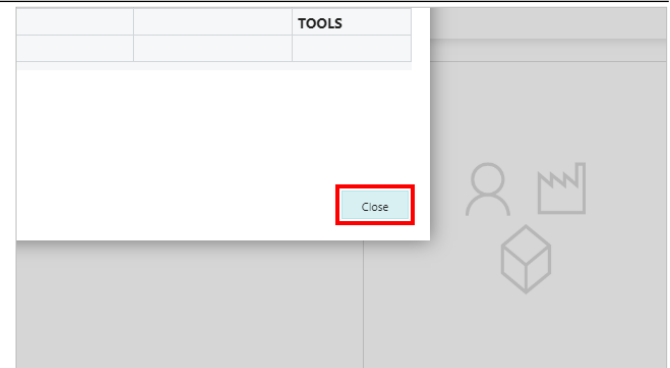


ID	NAME
1	Make
2	Model
4	Dig Depth
5	Guage
6	Fuel
7	Energy Source

+ New

Energy Source

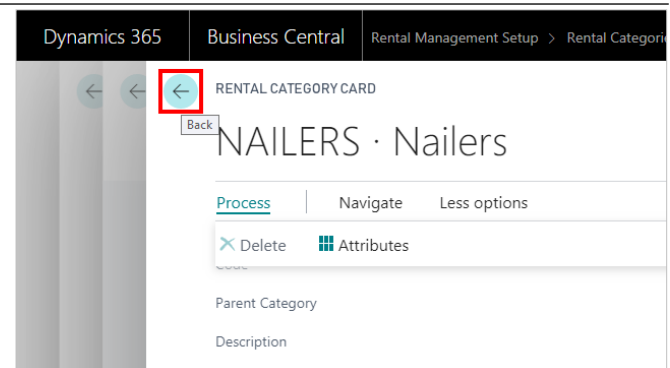
Click on the button **Close**



TOOLS

Close

Click on the back button



Dynamics 365 | Business Central | Rental Management Setup > Rental Categories > NAILERS · Nailers

RENTAL CATEGORY CARD

Back

NAILERS · Nailers

Process | Navigate | Less options

Delete | Attributes

Parent Category

Description

The following shows that the Rental Attributes assigned to the Nailers and Tools categories default to the Brad Nailers category.



EDIT - RENTAL CATEGORY ATTRIBUTES - MODEL			
ATTRIBUTE	VALUE	UNIT OF MEASURE	INHERITED FROM
Make	—		TOOLS
Model	—		TOOLS
Energy Source	—		NAILERS

4.20.3.5. How to Assign a Rental Category to a Rental Unit

The following example demonstrates adding a Rental Category to a Rental Unit group.

Click on the navigation menu item **Rental Units**

mentSalesPurchasingApprovalsSelf-ServiceRentalsSetup

ccountsRental PeriodsRental TermsRental Units

ACTIONS

+ Sales Quote+ Sales Order+ Sales Invoice+ Purchase Order+ Purchase Inv+ Rental Quote+ Rental Contr+ Rental Unit

Click on the link in cell **No.** with the value **RU00014**

RU00008	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00009	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00010	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00011	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00012	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00014	18 G Brad Nailer Group	<input checked="" type="checkbox"/>	R
RU [Open record "RU00014" in a new window]d Nailer			
RU00016	18 G Brad Nailer	<input type="checkbox"/>	R
RU00017	18 G Brad Nailer	<input type="checkbox"/>	R
RU00018	18 G Brad Nailer	<input type="checkbox"/>	R

Click on the field **Rental Category Code**

options

...

Rental Category Code

18 G BRAD NAILER GROUP

Search Description

18 G BRAD NAILER GROUP

Inactive

☐



ODT Rentals Online Help

Click on **Code = BRAD NAILERS**, **Description = Brad Nailers**

Click on the navigation menu item popup **Rental**

Click on the navigation menu item **Attributes**

Rental Attribute Values

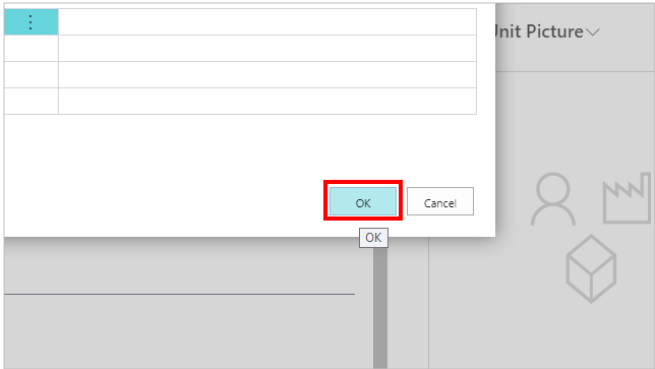
Note that the Attribute assigned to the Tools, Nailers and Brad Nailers are available on the Rental Unit Group card.

Attribute Values can be assigned at the group level when they apply to all units assigned to the group.

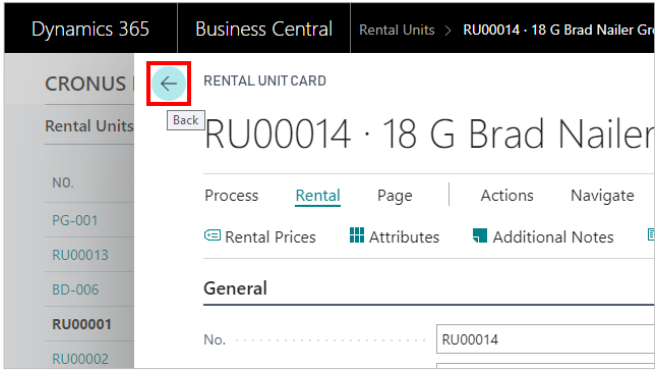


ODT Rentals Online Help

Click on the button **OK**



Click on the back button



The following demonstrates assigning the attribute values on the rental unit card.

Click on the link in cell **No.** with the value **RU00015**

RU00009	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00010	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00011	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00012	Cut-Off Gasoline Saw - Hybrid	<input type="checkbox"/>	R
RU00014	18 G Brad Nailer Group	<input checked="" type="checkbox"/>	R
RU00015	18 G Brad Nailer	<input type="checkbox"/>	R
RU00017	18 G Brad Nailer	<input type="checkbox"/>	R
RU00018	18 G Brad Nailer	<input type="checkbox"/>	R
RU00019	18 G Brad Nailer	<input type="checkbox"/>	R

Click on the field **Rental Category Code**

Notice the Rental Category defaulted from the Rental Group the unit is assigned to.

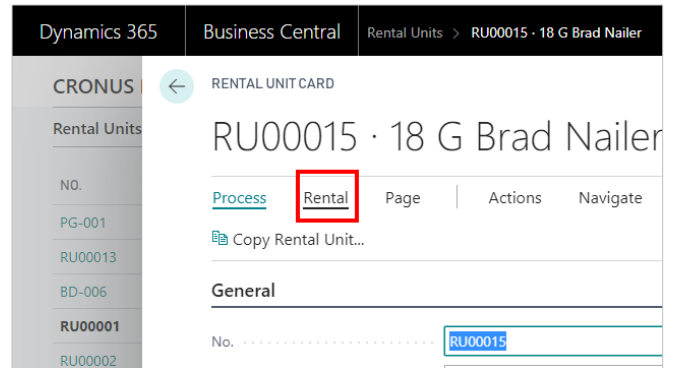
s options

Rental Category Code **BRAD NAILERS**

Search Description 18 G BRAD NAILER

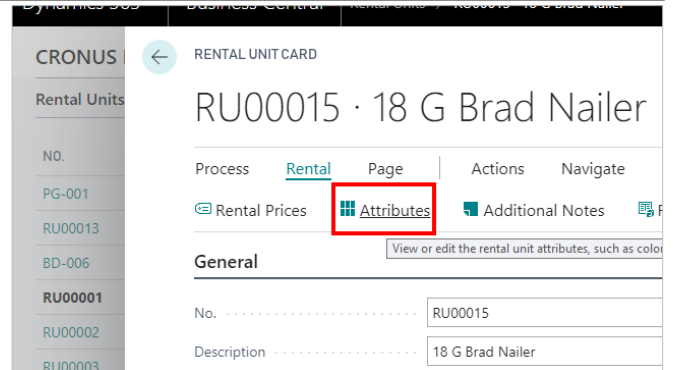
Inactive ☐

Click on the navigation menu item popup **Rental**



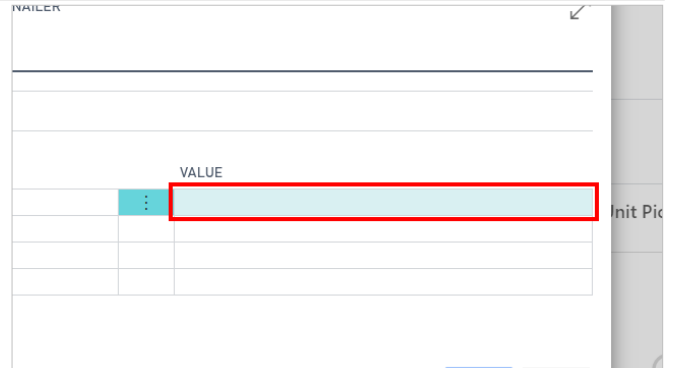
Click on the navigation menu item **Attributes**

Notice the Attributes automatically displayed defaulted from the Rental Unit Group the unit is linked to.

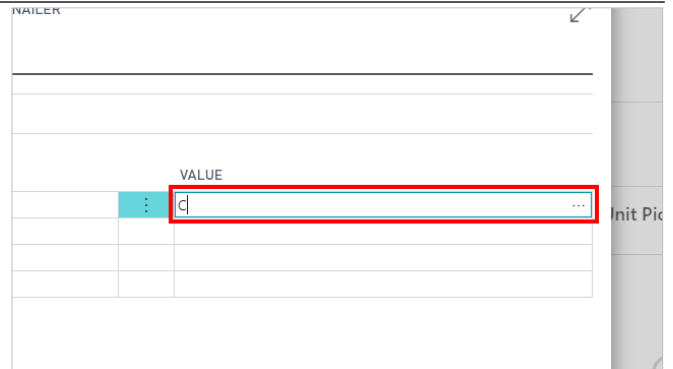


Click on the cell **Value**

Select the Value field on the Energy Source Attribute line.



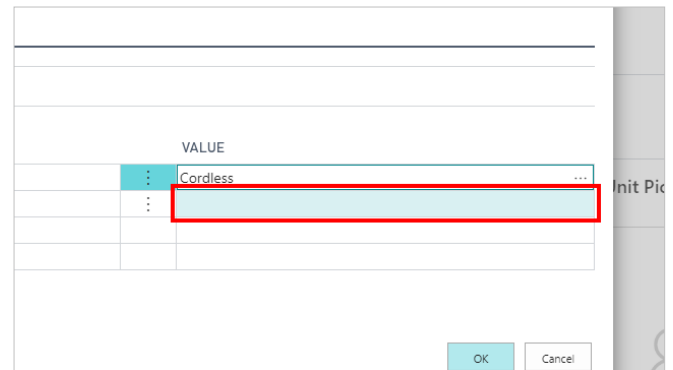
Enter the text **Cordless**.



ODT Rentals Online Help

Click on the cell **Value**

Select the Value field on the Make Attribute line.

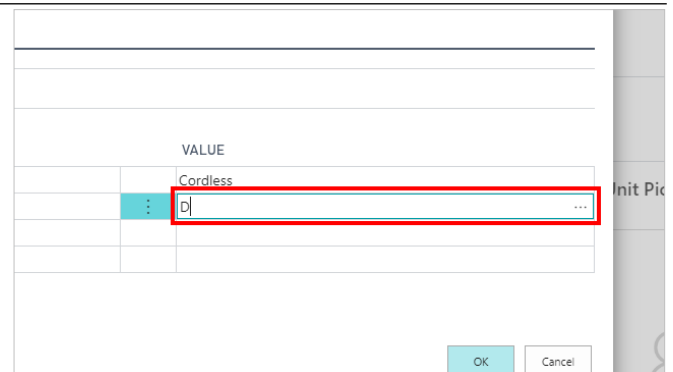


VALUE

:	Cordless	...
:		
:		

OK Cancel

Enter the text **Dewalt**.



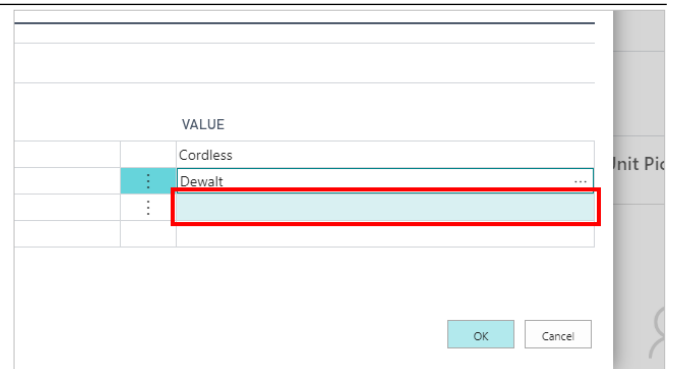
VALUE

:	Cordless	...
:	D	
:		

OK Cancel

Click on the cell **Value**

Select the Value field on the Model Attribute line.

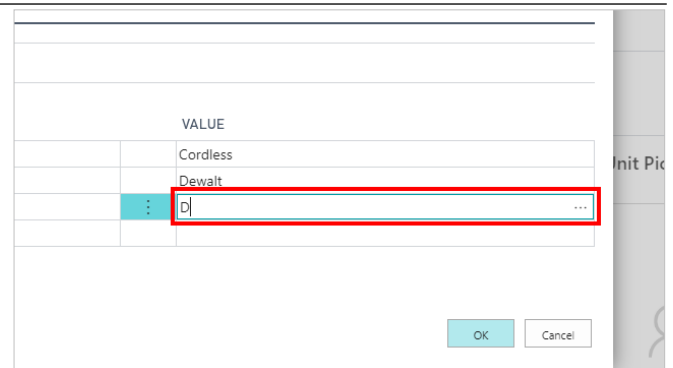


VALUE

:	Cordless	...
:	Dewalt	...
:		

OK Cancel

Enter the text **DCN68D1**.

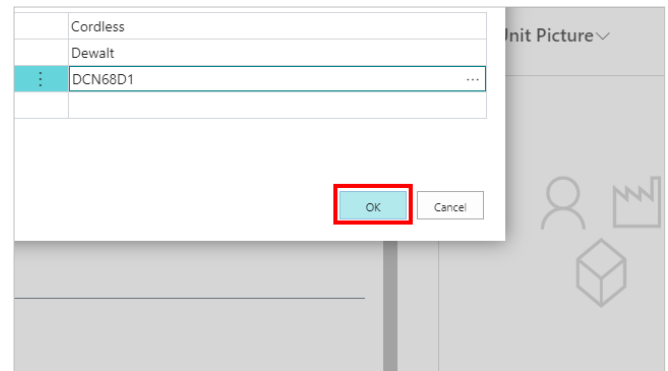


VALUE

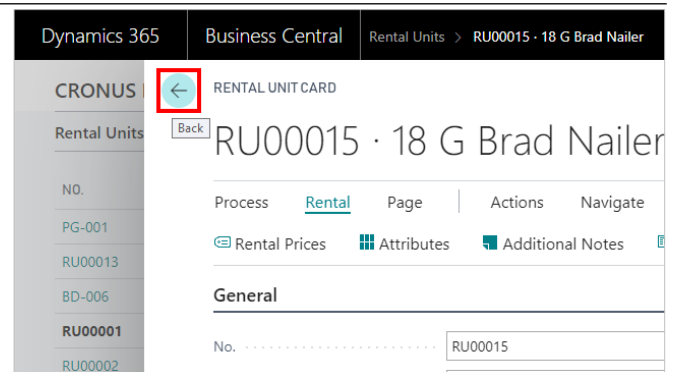
:	Cordless	...
:	Dewalt	...
:	D	

OK Cancel

Click on the button **OK**



Click on the back button



4.20.4. How to Filter the Rental Unit List By Attributes

4.20.4.1. Overview

The Rental Categories and Attributes feature provides the ability to filter the Rental Unit List, on one or more Rental Attributes, when the Attribute Values are specified.

Filtering the Rental Unit list by Rental Attribute provides a quick means to locate units which have the characteristics the customer is looking for.

For filtering by Category, the advanced filtering feature of Dynamics 365 Business Central is used.

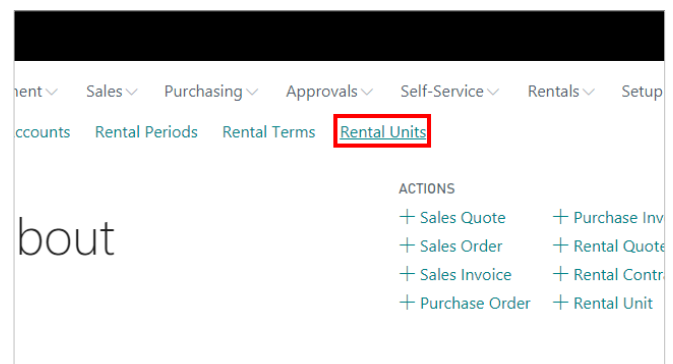
NOTE:

The field, Rental Category Code, is available to be added to the Rental Unit List using Personalize. This will be demonstrated in the chapter, How to Filter the Rental Unit List by Category.

4.20.4.2. How to Filter the Rental Unit List by Category

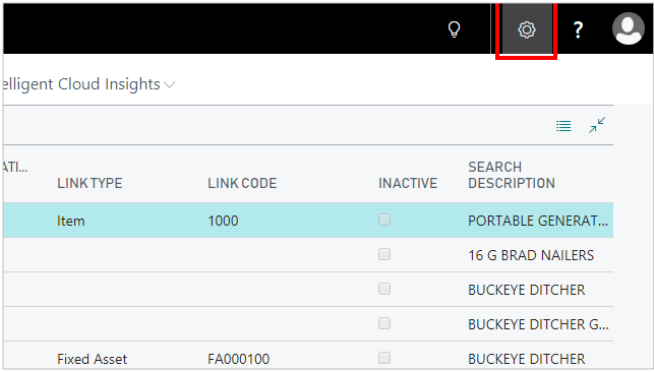
The following demonstrates adding the field, Rental Category Code, to the Rental Unit List.

Click on the navigation menu item **Rental Units**

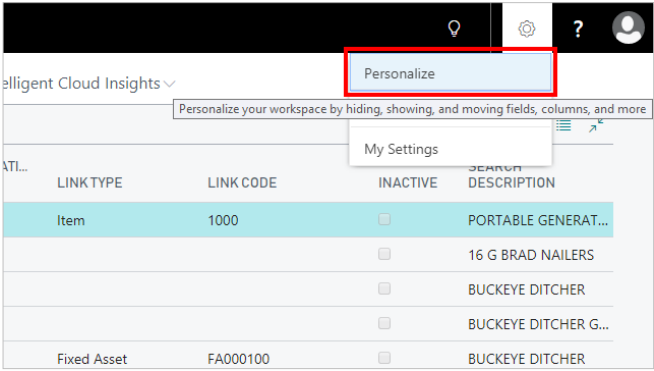




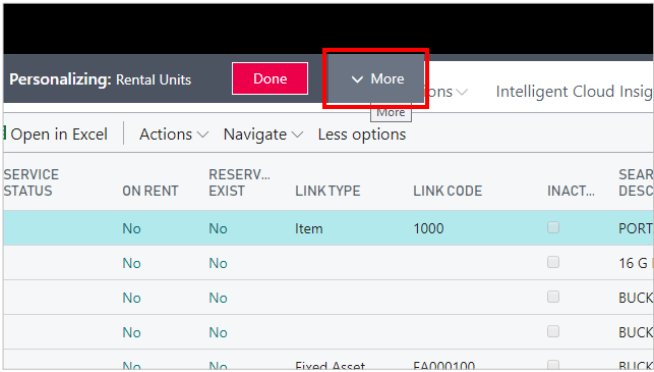
Click on the link **Settings**



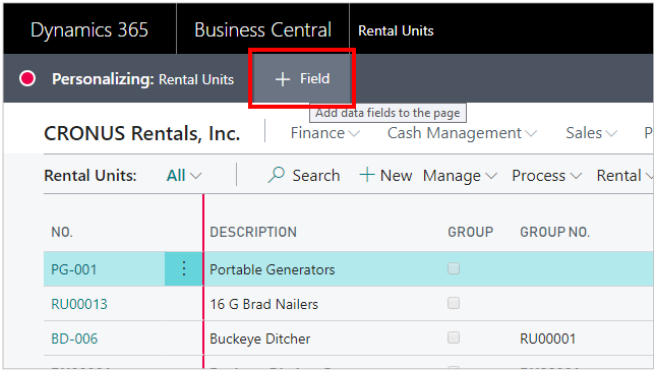
Click on the menu item **Personalize**



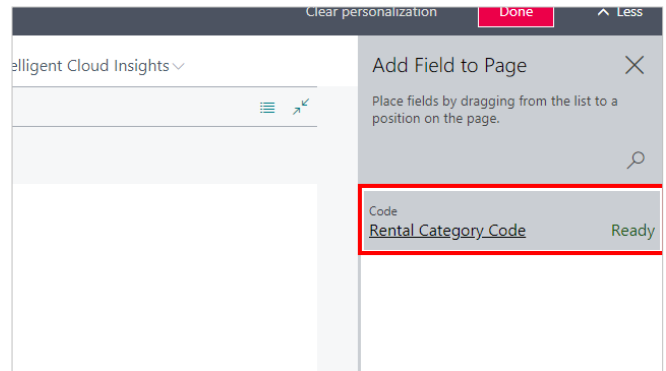
Click on the link **More**



Click on the link **Field**

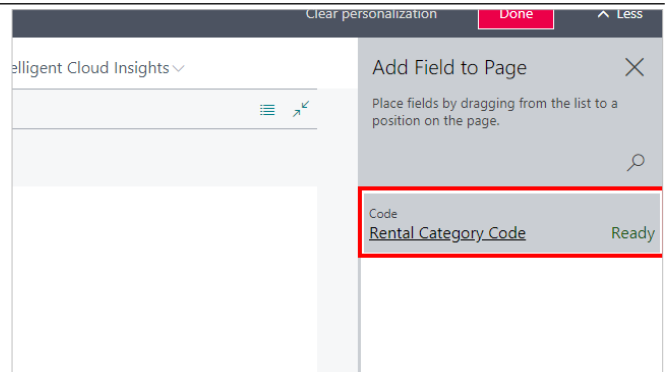


Click on the data brick **Caption = Rental Category Code**

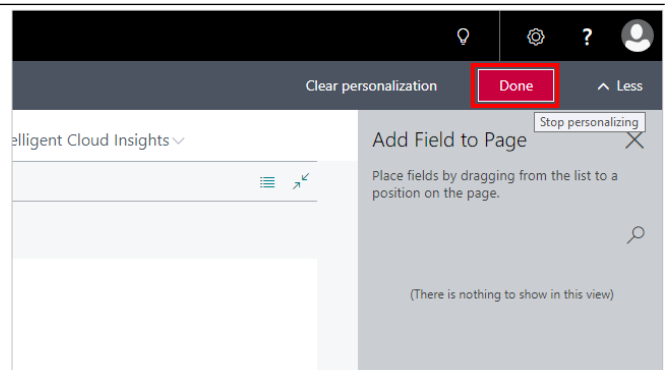


Click and hold the left mouse button on the data brick **Caption = Rental Category Code**

Drag and drop the selected field to the desired location on the Rental Unit List.



Click on the link **Done**



The following demonstrates using the advanced filtering option to filter by a Rental Category.

Click on the button **All**

Dynamics 365	Business Central	Rental Units
CRONUS Rentals, Inc.		
Finance Cash Management Sales P		
Rental Units:	All	Search + New Manage Process Rental
NO.	DESCRIPTION	GROUP GROUP N
PG-001	Portable Generators	
RU00013	16 G Brad Nailers	
BD-006	Buckeye Ditcher	RU00001
RU00001	Buckeye Ditcher Group	RU00001
RU00002	Buckeye Ditcher	RU00001



Click on the button **Show filter pane**

Dynamics 365		Business Central	Rental Units
CRONUS Rentals, Inc.			
FinanceCash ManagementSalesP			
Rental Units: AllSearchNewManageProcessRental			
NO.	All		GROUPGROUP N
PG-001	Show filter pane		
RU00013	16 G Brad Nailers		
BD-006	Buckeye Ditcher		RU00001
RU00001	Buckeye Ditcher Group		RU00001
RU00002	Buckeye Ditcher		RU00001

Click on the button **Filter list by...**

Rental Units: AllSearchNewManageProcessRental	
Views	NO. DESCRIPTION
All	PG-001 Portable Generators
Filter list by...	RU00013 16 G Brad Nailers
Filter totals by...	BD-006 Buckeye Ditcher
Reset filters	RU00001 Buckeye Ditcher Group
	RU00002 Buckeye Ditcher
	RU00003 Buckeye Ditcher
	RU00004 Buckeye Ditcher

Click on the button **Filter...**

Rental Units: AllSearchNewManageProcessRental	
Views	NO. DESCRIPTION
All	PG-001 Portable Generators
Filter list by:	RU00013 16 G Brad Nailers
+ Filter...	BD-006 Buckeye Ditcher
Filter totals by...	RU00001 Buckeye Ditcher Group
Reset filters	RU00002 Buckeye Ditcher
	RU00003 Buckeye Ditcher
	RU00004 Buckeye Ditcher
	RU00005 Buckeye Ditcher

Click on the button **Rental Category Code**

Location Code	RU00007 Cut-Off Gasoline Saw C
Service Status	RU00008 Cut-Off Gasoline Saw - f
On Rent	RU00009 Cut-Off Gasoline Saw - f
Reservations Exist	RU00010 Cut-Off Gasoline Saw - f
Link Type	RU00011 Cut-Off Gasoline Saw - f
Link Code	RU00012 Cut-Off Gasoline Saw - f
Rental Category Code	RU00014 18 G Brad Nailer Group
Inactive	RU00015 18 G Brad Nailer
Search Description	RU00016 18 G Brad Nailer
Other Available Columns	RU00017 18 G Brad Nailer
Allow Overbooking	RU00018 18 G Brad Nailer
Availability Manag	



Click on the field **Rental Category Code**

Views ×

All

Filter list by:

× Rental Category Code

+ Filter...

Filter totals by...

Reset filters

NO.	DESCRIPTION
PG-001	Portable Generators
RU00013	16 G Brad Nailers
BD-006	Buckeye Ditcher
RU00001	Buckeye Ditcher Group
RU00002	Buckeye Ditcher
RU00003	Buckeye Ditcher
RU00004	Buckeye Ditcher
RU00005	Buckeye Ditcher
RU00006	Buckeye Ditcher

Click on **Code = BRAD NAILERS**, Description = **Brad Nailers**

Views ×

All

Filter list by:

× Rental Category Code

+ Filter...

Filter totals by...

Reset filters

CODE	DESCRIPTION
TOOLS	Tools
NAILERS	Nailers
BRAD NAILERS	Brad Nailers
FRAM	Select record "BRAD NAILERS" taming Nailers

+ New Select from full list

RU00007	Cut-Off Gasoline Saw
RU00008	Cut-Off Gasoline Saw - f
RU00009	Cut-Off Gasoline Saw - f

The following displays the unit list filtered by the category selected in the advance filtering.

Rental Units: All × Search + New Manage ▼ Process ▼ Rental ▼ Attributes ▼ Open in Excel Actions ▼ Navigate ▼ Less options ⌵												
Views	×	NO.	DESCRIPTION	GROUP	GROUP NO.	LOCATION CODE	SERVICE STATUS	ON RENT	RESERV... EXIST	LINKTYPE	LINK CODE	RENTAL CATEGORY CODE
All		RU00013	16 G Brad Nailers			EAST		No	No			BRAD NAILERS
		RU00014	18 G Brad Nailer Group	✓	RU00014			No	No			BRAD NAILERS
		RU00015	18 G Brad Nailer		RU00014	EAST		No	No			BRAD NAILERS
		RU00016	18 G Brad Nailer		RU00014	EAST		No	No			BRAD NAILERS
		RU00017	18 G Brad Nailer		RU00014	EAST		No	No			BRAD NAILERS
		RU00018	18 G Brad Nailer		RU00014	WEST		No	No			BRAD NAILERS
		RU00019	18 G Brad Nailer		RU00014	WEST		No	No			BRAD NAILERS

To clear the filter complete the following steps.

Click on the link **Reset filters**

Filter list by:

× Rental Category Code

BRAD NAILERS ▼


+ Filter...

Filter totals by...

Reset filters

RU00015	18 G Brad Nailer
RU00016	18 G Brad Nailer
RU00017	18 G Brad Nailer
RU00018	18 G Brad Nailer
RU00019	18 G Brad Nailer

Click on the button **Hide the Filter Pane**

Dynamics 365	Business Central	Rental Units
CRONUS Rentals, Inc. | Finance ▾ Cash Management ▾ Sales ▾ P		
Rental Units: All ▾ | Search + New Manage ▾ Process ▾ Rental ▾		
Views		NO. DESCRIPTION
All	Hide the filter pane without clearing any filters. generators	
Filter list by:	RU00013	16 G Brad Nailers
+ Filter...	BD-006	Buckeye Ditcher
Filter totals by:	RU00001	Buckeye Ditcher Group
	RU00002	Buckeye Ditcher


4.20.4.3. How to Filter the Rental Unit List by Attribute Values

The following demonstrates filtering the Rental Unit List by a Rental Attribute.

Click on the navigation menu item popup **Attributes**

Rental Units				
▾	Cash Management ▾	Sales ▾	Purchasing ▾	Approvals ▾ Self-Service ▾
+ New	Manage ▾	Process ▾	Rental ▾	Attributes ▾ Open in Excel Actions ▾
	GROUP	GROUP NO.	LOCATION CODE	SERVICE STA
ors	<input type="checkbox"/>			
s	<input type="checkbox"/>		EAST	
	<input type="checkbox"/>	RU00001	EAST	
Group	<input checked="" type="checkbox"/>	RU00001		
	<input type="checkbox"/>	RU00001	EAST	

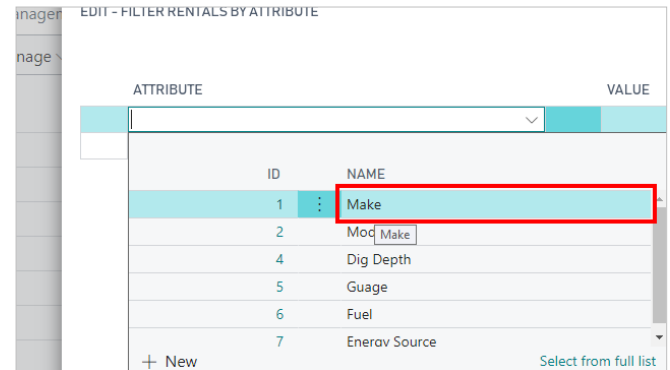
Click on the navigation menu item **Filter By Attributes**

Rental Units				
▾	Cash Management ▾	Sales ▾	Purchasing ▾	Approvals ▾ Self-Service ▾
+ New	Manage ▾	Process ▾	Rental ▾	Attributes ▾ Open in Excel Actions ▾
				 Filter By Attributes
	GROUP	GROUP NO.	LOCATION CODE	SERVICE STA
ors	<input type="checkbox"/>			
s	<input type="checkbox"/>		EAST	
	<input type="checkbox"/>	RU00001	EAST	
Group	<input checked="" type="checkbox"/>	RU00001		
	<input type="checkbox"/>	RU00001	EAST	

Click on the cell **Attribute**

Rental Units				
EDIT - FILTER RENTALS BY ATTRIBUTE				
ATTRIBUTE				

Click on the cell **Name** with the value **Make**

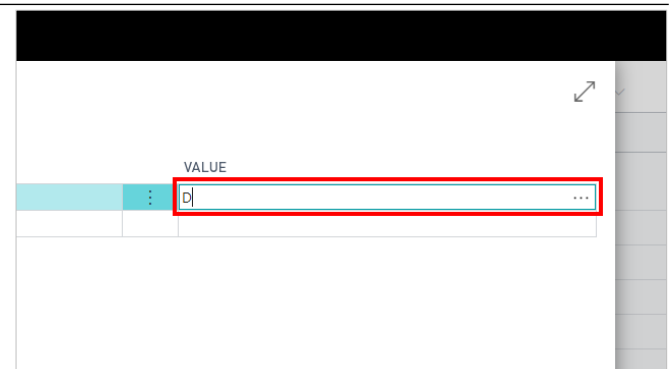


ID	NAME
1	Make
2	Mod Make
4	Dig Depth
5	Guage
6	Fuel
7	Enerav Source

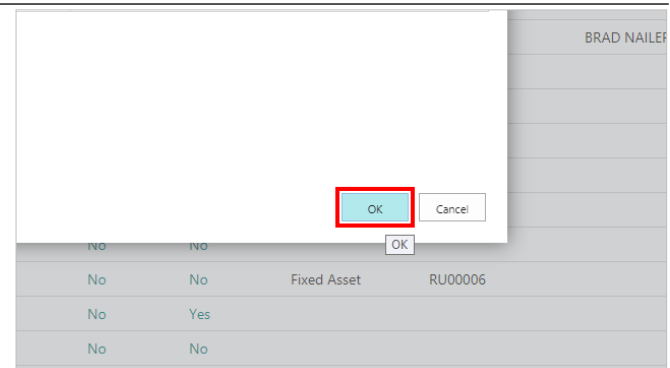
Click on the cell **Value**



Enter **Value**.



Click on the button **OK**



The following picture displays the list filtered by the selected Attribute and Attribute Value.

Rental Units: All Search + New Manage Process Rental Attributes Open in Excel Actions Navigate Less options													
Views	No.	DESCRIPTION	GROUP	GROUP NO.	LOCATION CODE	SERVICE STATUS	ON RENT	RESERV. EXIST	LINK TYPE	LINK CODE	RENTAL CATEGORY CODE	INAC...	SEARCH DESCRIPTION
All	RU00015	18 G Brad Nailer		RU00014	EAST		No	No			BRAD NAILERS		18 G BRAD NAL...
	RU00017	18 G Brad Nailer		RU00014	EAST		No	No			BRAD NAILERS		18 G BRAD NAL...

The following demonstrates clearing the Attribute



ODT Rentals Online Help

- Rental Package Card and List in the Rental and Related menu options
- Rental Package card lines in the Manage menu option
- Rental Price List in the Related Menu option
- Rental Quote Card in the Quote and Actions – Quote menu options
- Rental Contract Card in the Contract and Related – Contract menu options
- Rental Quote and Contract Rentals Lines in the Lines menu option
- Customer Card and List in the Customer and Related - Customer menu options
- Location Card and List in the Related menu option
- Item Card and List in the Related menu option
- Fixed Asset Card and List in the Related menu option
- Job Card and List in the Related menu option

4.21.1.2. Change Log Setup Tables

When setting up the Change Log Setup consideration needs to be given as to what should be tracked. It is highly recommended to not select All fields as this setting can adversely impact the application's performance.

Please review the Microsoft Dynamics Business Central Help and Support on how to setup the Change Log Setup.

The following is a list of the tables for setting up in the Change Log Setup for the pages that the View Change Log Entries menu option has been added to:

- 70014200 Rental Management Setup
- 70014209 Categories
- 70014238 Attributes
- 70014202 Rental Term Card
- 70014274 User Defined Rental Term Line
- 70014215 Rental Unit Card and Rental Packages
- 70014245 Rental Package Lines
- 70014203 Rental Price
- 70014220 Rental Quote and Contract Header
- 70014221 Rental Quote and Contract Rental Lines
- 18 Customer
- 167 Job
- 27 Item
- 14 Location
- 5600 Fixed Asset

4.21.1.3. Example of View Change Log Entries from a Rental Unit -



Price List

Click on the navigation menu item popup **Related**

The screenshot shows a web interface for a 'Price List'. At the top, there is a navigation bar with buttons: 'Edit List', 'Delete', 'Edit', 'View', 'Related' (highlighted with a red box), and 'Fewer options'. Below the navigation bar, there are several input fields: a text field with a dropdown arrow, a dropdown menu currently showing 'None', and another text field with a dropdown arrow. To the right of these fields, there are labels for 'Starting Date F' and 'Currency Code'.

Click on the navigation menu item **View Change Log Entries**

The screenshot shows the 'Dynamics 365 Business Central' interface. The main header is 'PG-001 - Portable Generators'. Below this, there is a navigation bar with buttons: 'Rental Price List', 'Search', '+ New', 'Edit List', 'Delete', and 'Edit'. Below the navigation bar, there is a button 'View Change Log Entries' (highlighted with a red box). Below this button, there are three filter fields: 'Rental Term Filter', 'Sales Type Filter' (with a dropdown menu showing 'None'), and 'Sales Code Filter'.

The following picture displays the change log entries related to the selected rental price record in the list.

The Change Log Entries are filtered to only show the entries related to the Rental Price Card.

The records show when the change was made, who made the change, and what the old value was and what the new value is.

The screenshot shows a window titled 'View - Change Log Entries'. It contains a table with the following columns: 'Date and Time', 'Time', 'User ID', 'Type of Change', 'Field Caption', 'Old Value', and 'New Value'. The table contains several rows of data, with the first row highlighted in blue.

Date and Time	Time	User ID	Type of Change	Field Caption	Old Value	New Value
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Price	150	125
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Billing	false	true
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Period C...		MONTH
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Pct.	0	10
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Unit Pric...	Unit Price	Percent
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Allow Li...	false	true
6/16/2022 2:15 PM	2:15:14 PM	ODT\ASTAPLETON	Modification	Damage Waiver Tax Grou...		SUPPLIES

4.22.Rental Approval Workflows

4.22.1. Rental Approval Workflows Overview

4.22.1.1. Overview

The Rental Approval Workflows allows for the use of approval workflows during rental processes, where a user must request approval before performing certain processes and must receive approval from one or more approvers before they are allowed to continue.

The ODT Workflow Setup provides for the mapping of rental fields for the workflows and the automatic creation of default rental workflow templates from which the Rental Workflows are created.

The Rental Approval Workflows utilize the standard Microsoft Dynamics Business Central workflows configuration, workflow groups, approval user setups, job queue category setup and notification setups.

To learn about the standard workflows, please access the Help from the "?" and search for Workflows.

The templates include Approval workflows and Credit Limit workflows for Rental Quotes and Rental Contracts.

Approval is required before performing any of the following processes:

- Printing a Rental Quote or Contract
- Sending a Rental Quote or Contract
- Print and Send a Rental Quote or Contract
- Running Create Contract from the Rental Quote
- Shipping on a Rental Contract

The Credit Limit Workflow Templates configuration for the Rental Quote and Rental Contract requires approval when the customers credit limit is exceeded. The specification of the Credit Warning option must be selected on Rental Management Setup.

The sample workflows created from the ODT Workflow Templates can be modified to meet the organizations requirements.

IMPORTANT NOTE:

When modifying an On Condition, the condition for the Contract Total is not to be added in ODT Rentals v10. This will be available on the next release of ODT Rentals App.

4.22.2. How to Setup for Rental Approvals

4.22.2.1. Overview

The setups required for the rental approval and credit limit workflows include:

- ODT Workflow Setup
- Creation of sample workflows from the ODT Templates
- Configuration of the Credit Warnings on Rental Management Setup if either of the Credit Limit workflows are to be used

The following setups are completed as per the standard Microsoft Business Central process.

- If applicable, the Workflow User Groups
- Approval User Setup using the Sales fields for rentals
- Notification Setups
- Job Queue Category for instant notification

The setup of Workflow User Group is to be completed as per Microsoft Dynamics Business Central Help.

The setup of the Approval User Setup for rental approvals is to be completed the same as when setting up the Approval User Setup for Sales approvals as per Microsoft Dynamics Business Central Help.

The setup for Notifications and Job Queue Category for instant notification is to be completed as per Microsoft Dynamics Business Central Help.

For ease of opening the respective help, search for the Workflows User Groups, Approval User Setup, Workflow Notification Setup or Job Queue Category and open the feature, then select the "?".

4.22.2.2. Approval User Setup and Users Notification Setup

The following picture displays an example of the Approval User Setup for the Rental Approval and Credit Limit Approvals.

Note that the Sales Approval fields are used for the Rental approvals.

For the Credit Limit Approvals the Salespers./Purch. Code must be populated on the Approver record.

Approval User Setup												
Search + New Edit List Delete Approval User Setup Test Notification Setup Actions Related Fewer options												
User ID ↑	Salespers./Purch. Code	Approver ID	Sales Amount Approval Limit	Unlimited Sales Approval	Purchase Amount Approval Limit	Unlimited Purchase Approval	Request Amount Approval Limit	Unlimited Request Approval	Approval Amount	Substitute	E-Mail	Phone No.
→ ODT\ASTAPLETON		ODT\TEST01		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	0.00			
ODT\TEST01	JO			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0.00			

The following picture displays an example of the Notification Setup when using the type of "Note" for creating notes on the rental document related to the approvals.

The Notification Type must be set to Approval.

Workflow Notification Setup: ODT\TEST01			
Search + New Edit List Delete Notification Schedule Actions Fewer options			
Notification Type ↑	Notification Method	Schedule	
→ Approval	Note	Instantly	

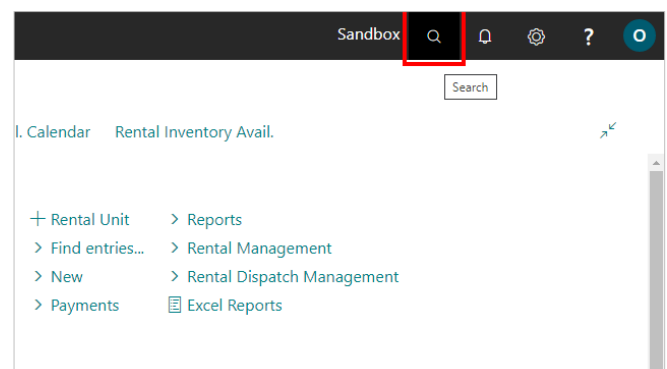
Should the organization prefer to have emails sent , then on the Approver User records the users' email address must be populated and the Email Setup and Email Accounts setup for the requestors and approvers.

4.22.2.3. Job Queue Category

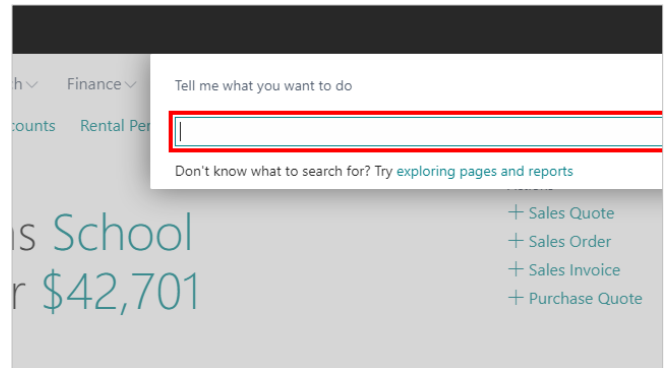
If the workflow approval notifications are to be sent immediately, then a Job Category must be setup for this.

The following demonstrates the setup of a Job Category for instant notification.

Click on the link **Search**

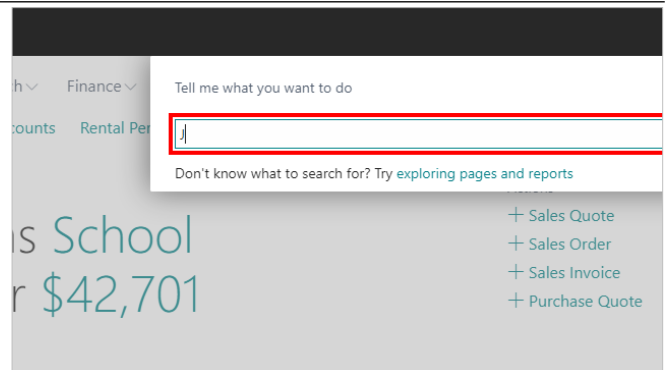


Click on the field **Tell me what you want to do**



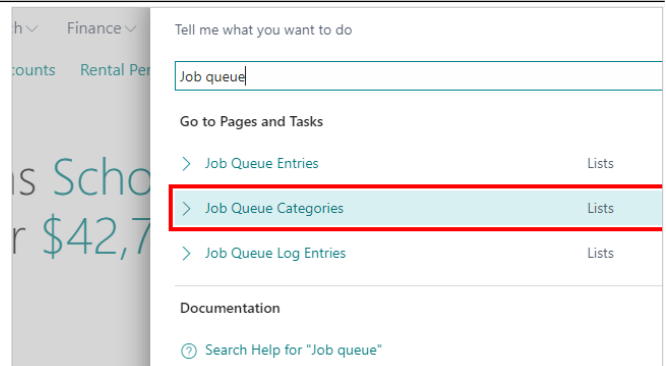
The screenshot shows the top navigation bar with a search bar labeled "Tell me what you want to do". The search bar is highlighted with a red rectangle. Below the search bar, there is a suggestion: "Don't know what to search for? Try [exploring pages and reports](#)". The background shows a blurred view of the application interface with text like "School" and "\$42,701".

Enter **Tell me what you want to do**.



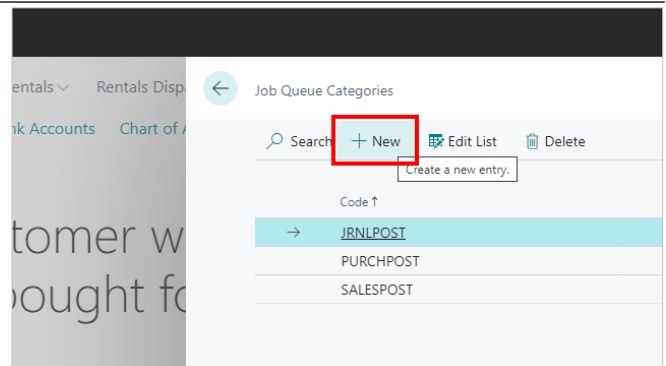
This screenshot is identical to the previous one, showing the search bar "Tell me what you want to do" with a red box around the input field and the same suggestion below it.

Click on **Job Queue Categories Lists** ☐



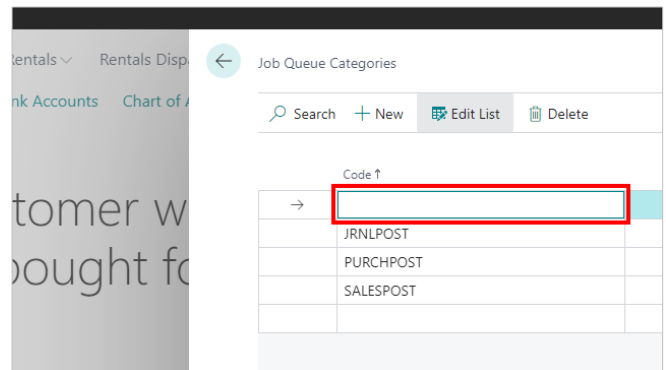
The screenshot shows the search results for "Job queue". The search bar contains "Job queue". Below the search bar, there is a section titled "Go to Pages and Tasks" with a list of items: "Job Queue Entries", "Job Queue Categories", and "Job Queue Log Entries". The "Job Queue Categories" item is highlighted with a red box. To the right of each item is the word "Lists". Below this section is a "Documentation" section with a link "Search Help for 'Job queue'".

Click on the navigation menu item **New**



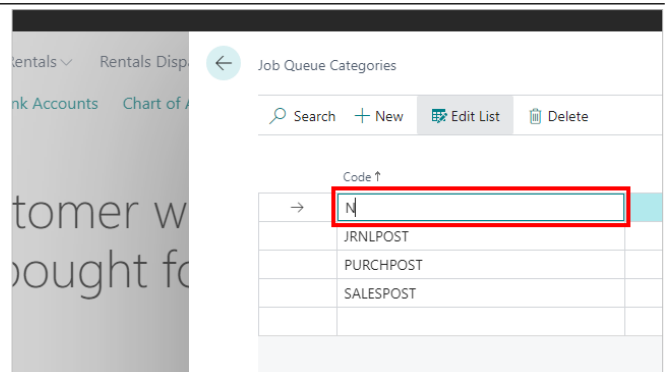
The screenshot shows the "Job Queue Categories" page. The navigation bar at the top has a back arrow and the title "Job Queue Categories". Below the navigation bar, there is a search bar and three buttons: "+ New", "Edit List", and "Delete". The "+ New" button is highlighted with a red box. Below the buttons, there is a "Create a new entry." button. The main content area shows a table with a header "Code ↑" and three rows: "JRNLPST", "PURCHPOST", and "SALESPOST". The "JRNLPST" row is highlighted with a blue background.

Click on the cell **Code**



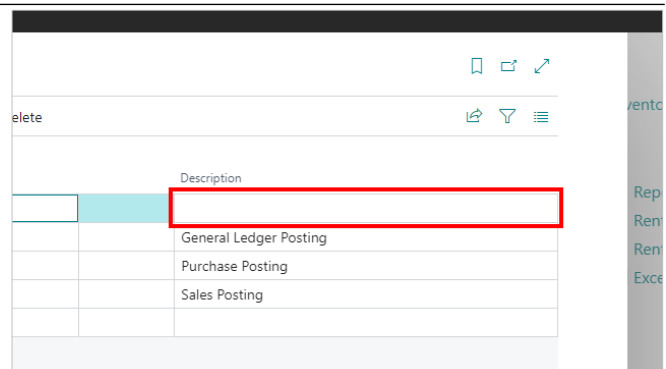
Code ↑	
JRNLPST	
PURCHPOST	
SALESPOST	

Enter the text **NOTIFYNOW**.



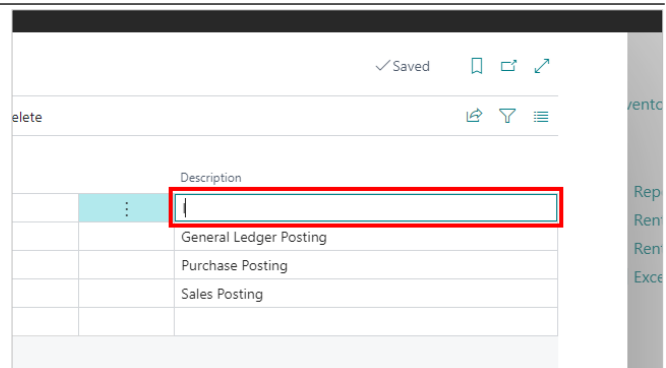
Code ↑	
NOTIFYNOW	
JRNLPST	
PURCHPOST	
SALESPOST	

Click on the cell **Description**



Description	
General Ledger Posting	
Purchase Posting	
Sales Posting	

Enter the text **Instant Notification Job**.



Description	
Instant Notification Job	
General Ledger Posting	
Purchase Posting	
Sales Posting	

4.22.2.4. ODT Workflow Setup

The ODT Workflow Setup provides for the automatic creation of the records mapping to the rental table, pages and fields that are used in creating the default rental workflow templates.

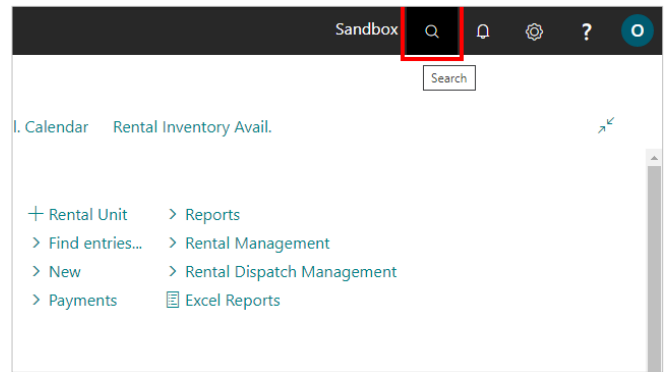
The workflow template samples include Approval workflows and Credit Limit workflows for Rental Quotes and Rental Contracts.

The templates are added to the standard Workflow Templates list under the heading of ODT WorkFlow when the records in ODT Workflow are enabled.

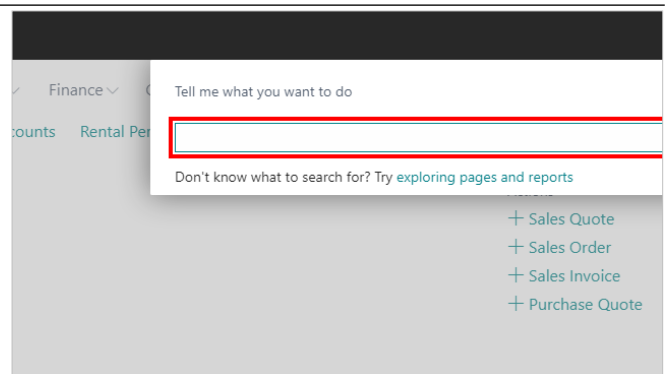
ODT Rentals Online Help

The following demonstrates the accessing and process step on the ODT Workflow Setup.

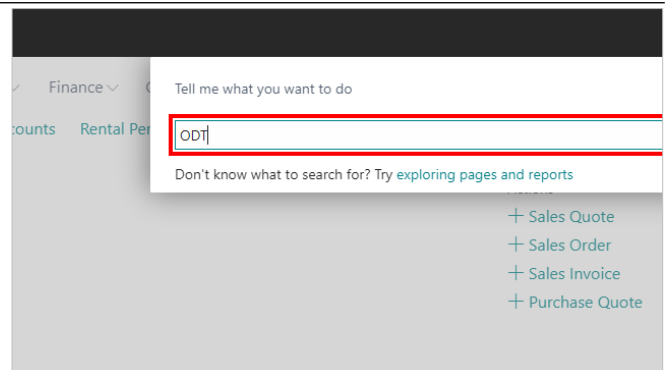
Click on the link **Search**



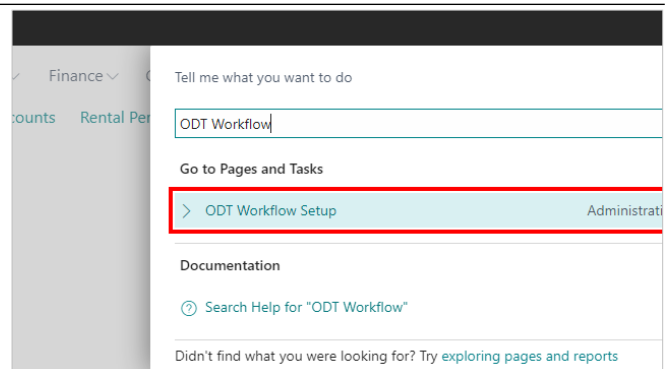
Click on the field **Tell me what you want to do**



Enter the text **ODT Workflow**.



Click on **ODT Workflow Setup Administration** ☐



Click on the navigation menu item popup **Actions**

Business Central

Workflow Setup

Search + New Edit List Delete **Actions** Fewer options

Table Id ↑	Table Name	Page Id ↑	Page Name	Document Type Field
0		0		

Click on the navigation menu item **Generate default rental workflow setup**

Dynamics 365 Business Central

ODT Workflow Setup

Search + New Edit List Delete Actions Fewer options

Generate default rental workflow setup

Table Id ↑	Table Name	Page Id ↑	Page Name
0	Generate default rental workflow setup	0	

Click on the cell **Table Id** with the value **70014220**

The Table ID and Table Name specify the table that the workflows apply to.

ODT Workflow Setup

Search + New Edit List Delete Actions Fewer options

Table Id ↑	Table Name	Page Id ↑	Page Name
70014220	ODT Rental Contract Header	70014220	ODT Rental Co
70014220	ODT Rental Contract Header	70014223	ODT Rental Qu

Click on the cell **Page Id** with the value **70014220**

The Page Id and Page Name specify the page that the workflows apply to that are used with the table.

Workflow Setup

Search + New Edit List Delete Actions Fewer options

Table Id ↑	Table Name	Page Id ↑	Page Name	Document Type Field
70014220	ODT Rental Contract Header	70014220	ODT Rental Contract	Document T
70014220	ODT Rental Contract Header	70014223	ODT Rental Quote	Document T



Click on the cell **Document Type Field** with the value **Document Type**

The Document Type field and Document No. fields specify that the approvals are based on individual rental documents.

Delete Actions Fewer options					
	Page Id ↑	Page Name	Document Type Field	Document No. Field	Status Field
Document Header	70014223	ODT Rental Contract	Document Type	No.	Approval Status
Document Header	70014223	ODT Rental Quote	Document Type	No.	Approval Status

Click on the cell **Status Field** with the value **Approval Status**

The Status Field specifies the Approval Status field that is visible on the contract and quote page when these records are enabled.

The Workflow Type specifies the workflows are based on the rental quote and contract documents.

Fewer options					
Name	Document Type Field	Document No. Field	Status Field	Workflow Type	Amount
Rental Contract	Document Type	No.	Approval Status	Document	70014204
Rental Quote	Document Type	No.	Approval Status	Document	70014204

Click on the cell **Amount** with the value **70014204**

The Amount field contains the field no. of the Contract Total which is used in the workflows.

Document No. Field	Status Field	Workflow Type	Amount	Customer No. Field	Customer Name
No.	Approval Status	Document	70014204	Sell-to Customer No.	Sell-to Customer Name
No.	Approval Status	Document	70014204	Sell-to Customer No.	Sell-to Customer Name

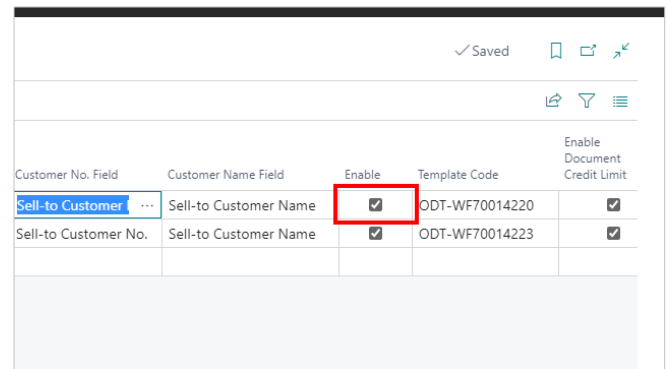
Click on the cell **Customer No. Field** with the value **Sell-to Customer No.**

The Sell-to Customer No. and Sell-to Customer fields are used in Credit Limit Workflows.

Status Field	Workflow Type	Amount	Customer No. Field	Customer Name Field
Approval Status	Document	70014204	Sell-to Customer No.	Sell-to Customer Name
Approval Status	Document	70014204	Sell-to Customer No.	Sell-to Customer Name

Click on the cell **Enable** with the value **on**

The Template Code specifies the code used when creating the Workflow Templates.



Customer No. Field	Customer Name Field	Enable	Template Code	Enable Document Credit Limit
Sell-to Customer	Sell-to Customer Name	<input checked="" type="checkbox"/>	ODT-WF70014220	<input checked="" type="checkbox"/>
Sell-to Customer No.	Sell-to Customer Name	<input checked="" type="checkbox"/>	ODT-WF70014223	<input checked="" type="checkbox"/>

The Enable field when checked specifies that the Approval Workflow template is to be added to the Workflow Templates.

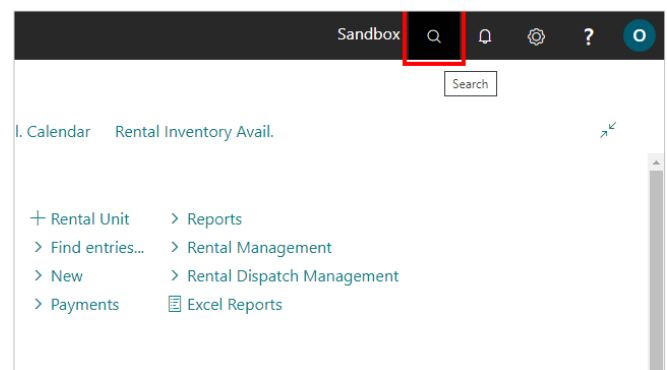
The Enable Document Credit Limit when checked specifies the Credit Limit workflows are to be add to the Workflow Templates.

When the Enable or Enable Document Credit Limit fields are not checked, then the ODT Workflows will not be added to the Workflow Templates.

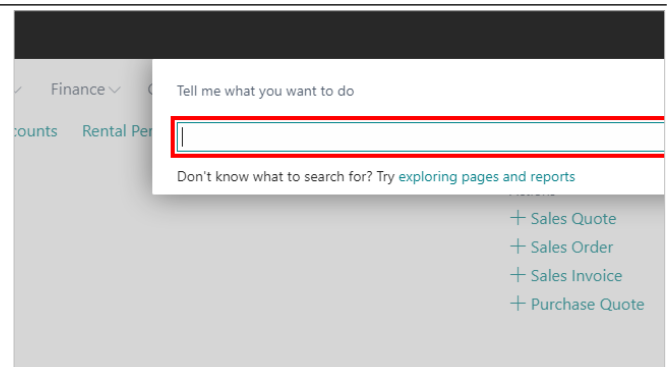
4.22.2.5. Creating Rental Workflows from the Workflow Templates

The following demonstrates accessing the default ODT Workflow Templates and the creation of a Workflow from a template.

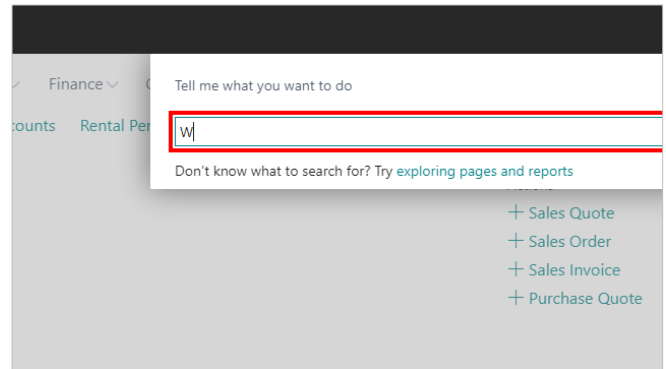
Click on the link **Search**



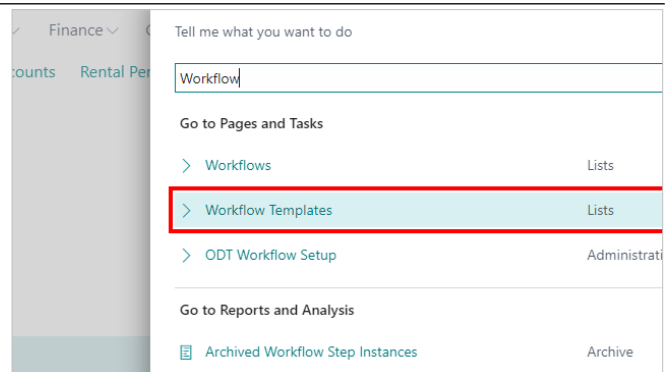
Click on the field **Tell me what you want to do**



Enter the text **Workflow**.

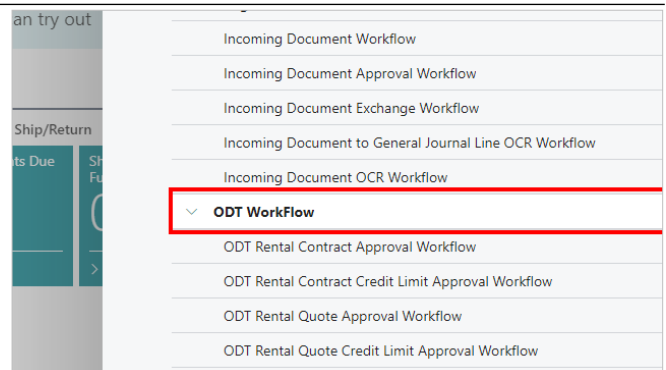


Click on **Workflow Templates Lists** ☐



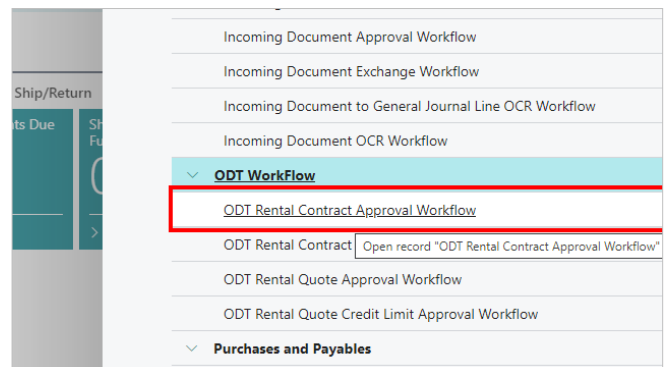
Click on the cell **Description** with the value **ODT WorkFlow**

As on ODT Workflow Setup the Enable and Enable Document Credit Limit were checked on both records, the four rental Workflow Templates were created.

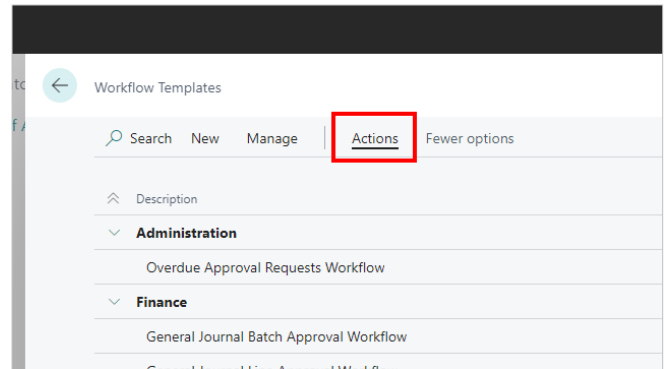


The following steps demonstrate the creation of the sample Workflow from the ODT Rental Contract Approval Workflow Template.

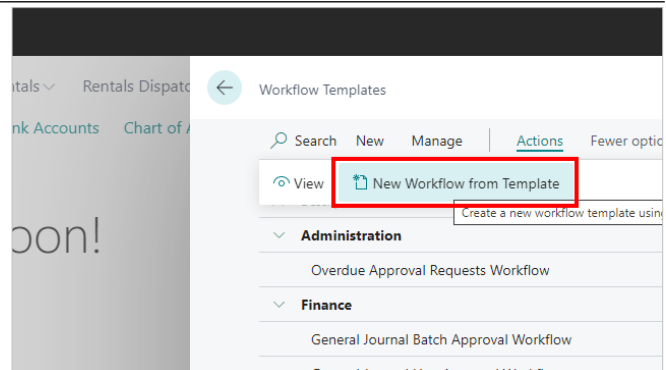
Click on the link in cell **Description** with the value **ODT Rental Contract Approval Workflow**



Click on the navigation menu item popup **Actions**



Click on the navigation menu item **New Workflow from Template**



The following picture displays the workflow created from the Rental Contract Approval Workflow Template. Note that the Code has 01 appended to the Workflow Template Code.

ODT-WF70014220-01 · ODT Rental Contract Approval Workflow

Import from File Export to File Workflow Step Instances Archived Workflow Step Instances More options

Code ODT-WF70014220-01

Description ODT Rental Contract Approval Workflow

Category ODTWF

Enabled ☒

Workflow Steps Manage

When Event	On Condition	Then Response
→ Approval for ODT Rental Contract is requested	Approval Status: Open	(+) Add record restriction.
An approval request is approved.	Pending Approvals: 0	(+) Remove record restriction.
An approval request is approved.	Pending Approvals: >0	Send approval request for the record and create a notification.
An approval request is rejected.	<Always>	(+) Reject the approval request for the record and create a notification.
Approval of ODT Rental Contract is canceled	Approval Status: Pending Approval	(+) Cancel the approval request for the record and create a notification.
An approval request is delegated.	<Always>	Send approval request for the record and create a notification.

Repeat the above steps to create other rental workflows as needed for:

- ODT Rental Contract Credit Limit Approval Workflow
- ODT Rental Quote Approval Workflow
- ODT Rental Quote Credit Limit Approval Workflow

To use the desired workflows in processing Rental Quotes or Rental Contracts the workflow must be enabled. When enabled, then the Approvals menu option will be available on the rental document the workflow is for. The following demonstrates enabling the ODT Rental Contract Approval Workflow.



Click on the toggle field Enabled

WORKFLOW

Export to File Workflow Step Instances Archived Workflow Step Instances ...

ODT-WF70014220-01

ODT Rental Contract Approval Workflow

ODTWF

☒

Manage

On Condition Then Response

4.22.2.6. How to Configure the Credit Warnings on Rental Management Setup

The Credit Warnings field on Rental Management Setup will only be available when either or both of the Credit Limit workflows are enabled. The field provides the same options as on the Sales & Receivables Setup, Credit Warnings field.

Click on the navigation menu item popup **Rental Management**

Mail. Matrix Rental Avail. Calendar Rental Inventory Avail.

+ Purchase Order + Rental Unit > Reports

+ Purchase Invoice > Find entries... > Rental Management

+ Rental Quote > New > Rental Dispatch Management

+ Rental Contract > Payments Excel Reports

Click on the navigation menu item **Rental Management Setup**

Mail. Matrix Rental Avail. Calendar Rental Inventory Avail.

+ Purchase Order + Rental Unit > Reports

+ Purchase Invoice > Find entries... > Rental Management

+ Rental Quote > New Rental Management Setup

+ Rental Contract > Payments

Signature View or edit settings for Rental Management

Visual Calendar Setup

Rental Invoicing Worksheet

Rental Rapid Returns

Show

Click on the field **Credit Warnings**

Enable Auto Credit

1 Credit Memo/Return

Auto Post Auto Credit

Auto Credit Reason C...

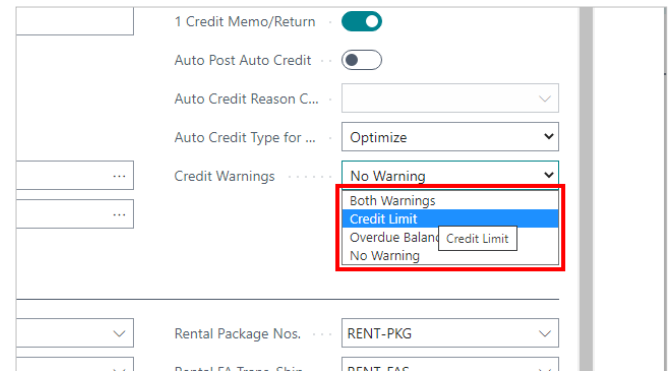
Auto Credit Type for ...

Credit Warnings

No Warning

Rental Package Nos. RENT-PKG

Click on the item **Credit Limit** in the list



4.22.3. How to Process Rental Documents with Rental Workflows

4.22.3.1. Processing Rental Documents with Workflows Overview

When a Rental Workflow is enabled, the user creating a rental document must send an approval request, if required, based on the workflow events and conditions.

- For Rental Quotes, before the user can print, email, send the quote or run Make Contract, the approver must approve the request for approval.

- For Rental Contracts, before the user can print, email, send the contract or ship any rental units on a contract, the approver must approve the request for approval.

When the rental document requires an approval, if the user attempts to run any of the above noted processes, a pop-up message will occur advising the user that the rental document must be approved and released.

Summary of processing steps which are dependent on the workflow events and conditions:

- User creates the rental document.
- If the document does not require approval, the user processes the document.
- If the document requires approval, the user sends an approval request.
- The Approver reviews the request and approves, rejects, or delegates the approval request.
- If approved, then the user processes the document.

NOTES:

Should the Rental Contract contain only Sales Lines, then the user must send a request for approval, and approver must approve the request before the user can invoice the contract as the product is shipped at the time of invoicing.

The only processing difference between the sample Rental Approval Workflow and Credit Limit Approval Workflow is that the Credit Limit Workflow displays a notification on the rental document based on the Credit Warnings option selected on Rental Management Setup.

4.22.3.2. Processing a Rental Quote with a Credit Limit Workflow

The following example demonstrates the creation and processing of the approvals of a Rental Quote where the customer is over their credit limit.

Included are the disallowed process steps to demonstrate the message that will occur.



ODT Rentals Online Help

Click on the navigation menu item **Rental Quote**

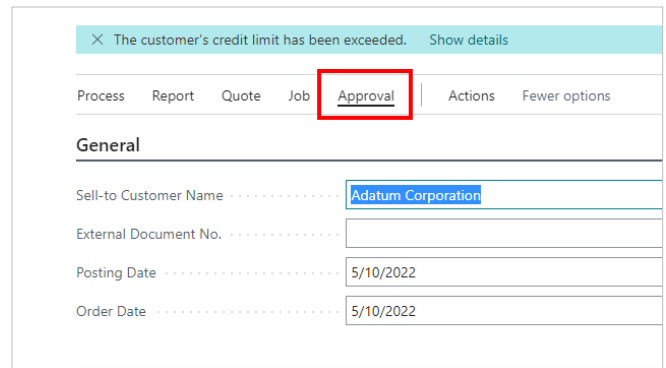
Click on the lookup button **Sell-to Customer Name**

Click on the link in cell **No.** with the value **10000**

Click on **The customer's credit limit has been exceeded. Show details**

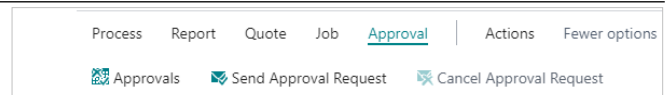
The notification is displayed as the Rental Management Setup has the Credit Warning option of Credit Limit selected.

Click on the navigation menu item popup **Approval**



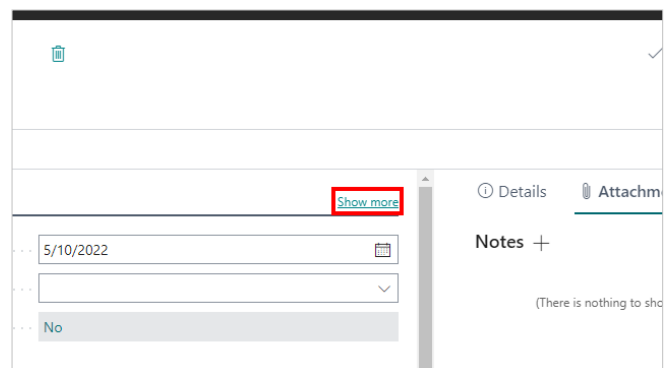
Approval Menu

When the user is setup as an Approval User that has an Approver ID specified on the record, then these are the Approval Menu options available to the user.



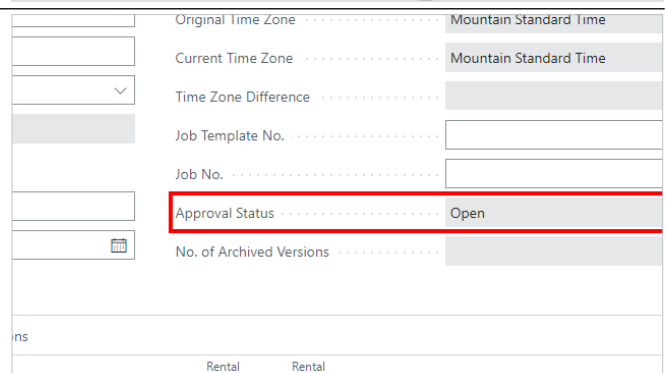
- The Approvals menu option when selected will display any Approval Entries related to this rental document.
- The Send Approval Request must be selected when an approval is required.
- The Cancel Approval Request is only available once an Approval Request has been sent and cancels the request.

Click on the button **General, Show more**

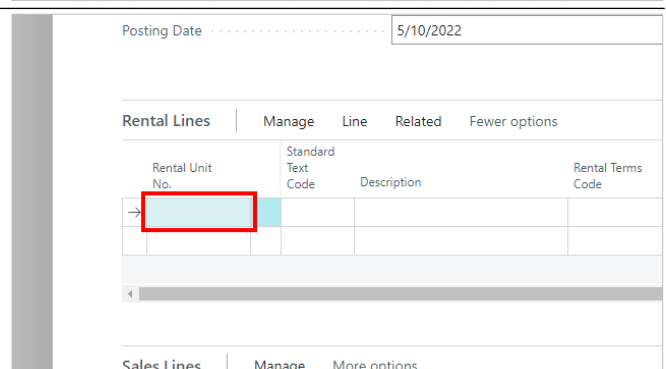


Click on **Approval Status Open**

Note that the Approval Status is set to Open.



Click on the cell **Rental Unit No.**





ODT Rentals Online Help

Click on the lookup button in the cell **Rental Unit No.**

Posting Date 5/10/2022

Rental Lines | Manage | Line | Related | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Terms Code
→	...		
Choose a value for Rental Unit No.			

EMONTH

Sales Lines | Manage | More options

Click on the cell **No.** with the value **RU00018**

RU00012	Cut-Off Gasoline Saw GRP - Hybrid
RU00013	Cut-Off Gasoline Saw - Hybrid
RU00014	Cut-Off Gasoline Saw - Hybrid
RU00015	Cut-Off Gasoline Saw - Hybrid
RU00016	Cut-Off Gasoline Saw - Hybrid
RU00017	Cut-Off Gasoline Saw - Hybrid
RU00018	Mini Excavator Group
RU00018-001	Mini Excavator
RU00018-002	Mini Excavator
RU00018-003	Mini Excavator
RU00018-004	Mini Excavator
RU00018-005	Mini Excavator

Click on the cell **Rental Quantity** with the value **0**

..... 5/10/2022 No. of Archived Versions

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R D
Mini Excavator Group	MONTH-PEND	0				5

ore options

Enter the text **2**.

..... 5/10/2022 No. of Archived Versions

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1	Rental Terms Code Alt2	R D
Mini Excavator Group	MONTH-PEND	2				5

ore options



Click on the navigation menu item popup **Report**

Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

Process **Report** Quote Job Approval Actions Fewer options

General

Sell-to Customer Name Adatum Corporation

Sell-To

Click on the navigation menu item **Print...**

Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

Process **Report** Quote Job Approval Actions Fewer options

Print... Email... Send...

Prepare to print the document. A report request window for the document opens when you click the Print button.

Sell-to Customer Name Adatum Corporation

Sell-To

Sell-to Address 192 Market Square

Click on the button **OK**

! Rental Quote RQ00005 must be approved and released before you can perform this action.

How to report this issue >

Was this information helpful? ☐ Yes ☐ No **OK**

Click on the navigation menu item popup **Process**

Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

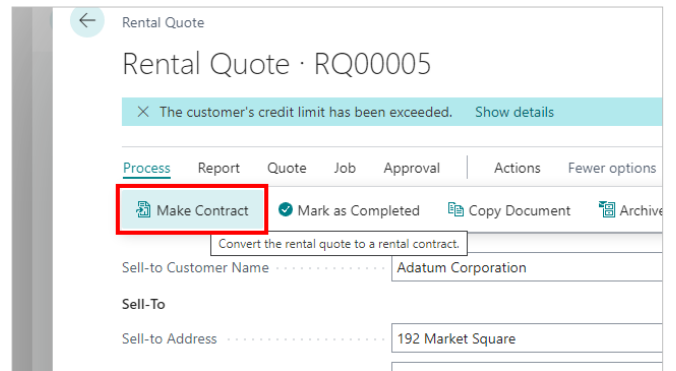
Process Report Quote Job Approval Actions Fewer options

General

Sell-to Customer Name Adatum Corporation

Sell-To

Click on the navigation menu item **Make Contract**



Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

Process Report Quote Job Approval Actions Fewer options

Make Contract Mark as Completed Copy Document Archive

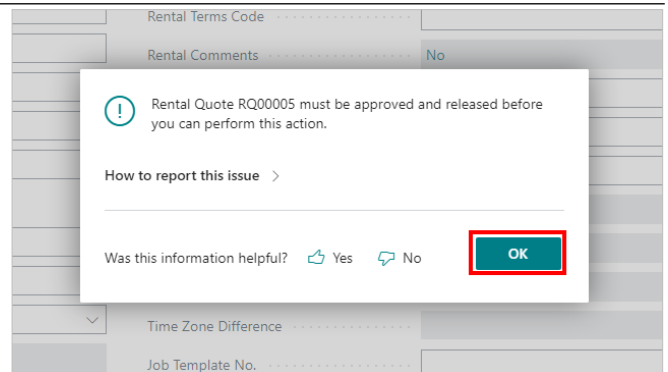
Convert the rental quote to a rental contract.

Sell-to Customer Name Adatum Corporation

Sell-To

Sell-to Address 192 Market Square

Click on the button **OK**



! Rental Quote RQ00005 must be approved and released before you can perform this action.

How to report this issue >

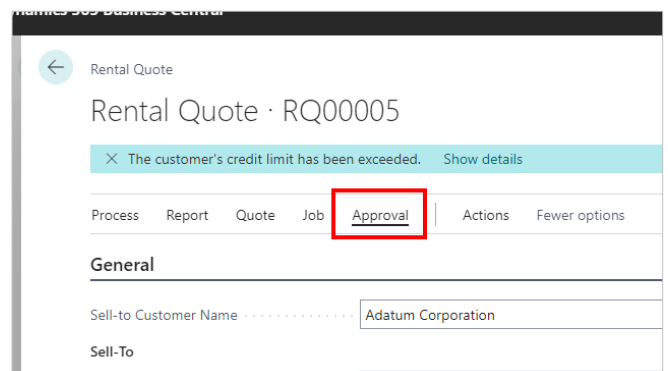
Was this information helpful? ☐ Yes ☐ No **OK**

Time Zone Difference

Job Template No.

The following demonstrates the sending of an approval request.

Click on the navigation menu item popup **Approval**



Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

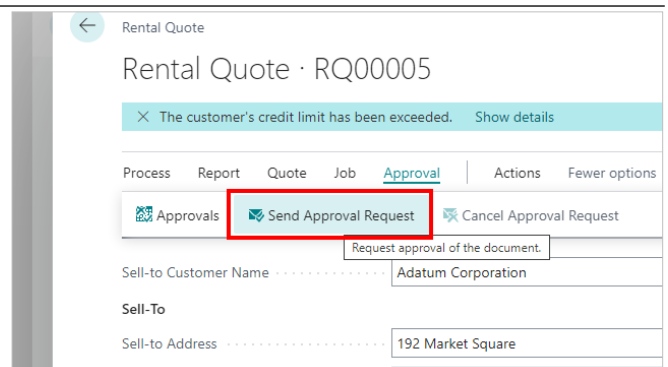
Process Report Quote Job **Approval** Actions Fewer options

General

Sell-to Customer Name Adatum Corporation

Sell-To

Click on the navigation menu item **Send Approval Request**



Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

Process Report Quote Job Approval Actions Fewer options

Approvals **Send Approval Request** Cancel Approval Request

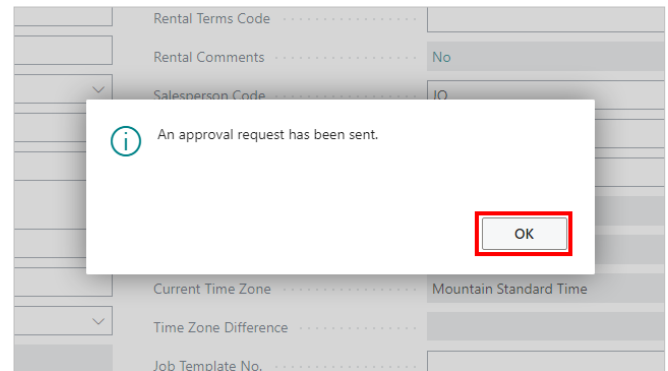
Request approval of the document.

Sell-to Customer Name Adatum Corporation

Sell-To

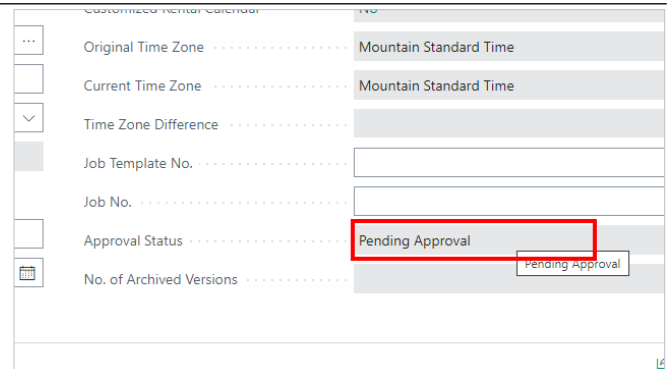
Sell-to Address 192 Market Square

Click on the button **OK**



Click on the field **Approval Status**

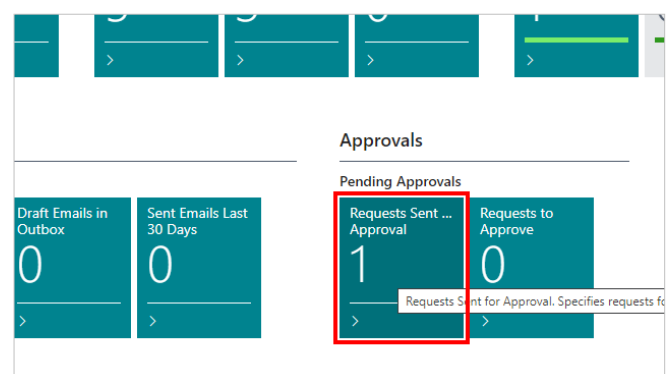
Note that the Approval Status has been updated to be Pending Approval.



On the requesting user role center, the user can quickly see the number of requests they have sent for approval that are pending the approvers' approval.

And can access the list of the outstanding requests to view which rental documents they have sent the approval request on.

Click on the link **Requests Sent for Approval**.

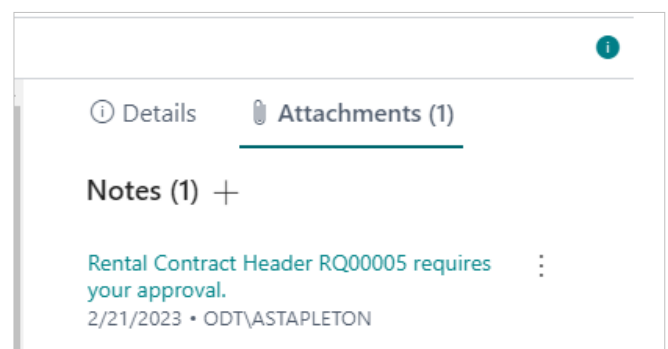


List of outstanding requests sent for approval.

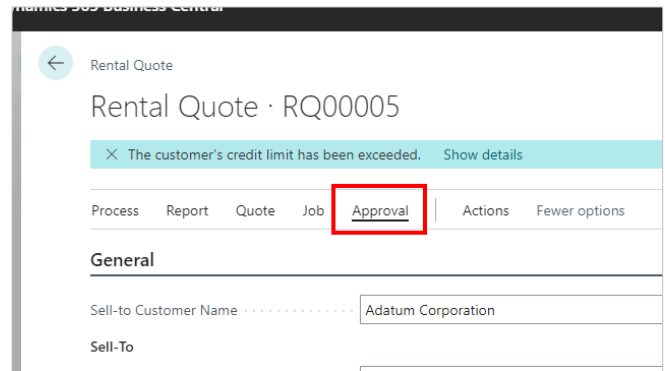
Requests Sent for Approval						
Overview	Limit Type	Approval Type	To Approve	Details	Sequence No.	Status
Approval L...	Sales Pers./...	Rental Contract Header: Rental...	Adatum Corporation / Contract...		1	Open

On the Rental Quote, when the Notification Setup has the Type of Note, then the user can see the Note and review the Approvals directly from the quote.

Rental Quote - Notification Note



Click on the navigation menu item popup **Approval**



Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

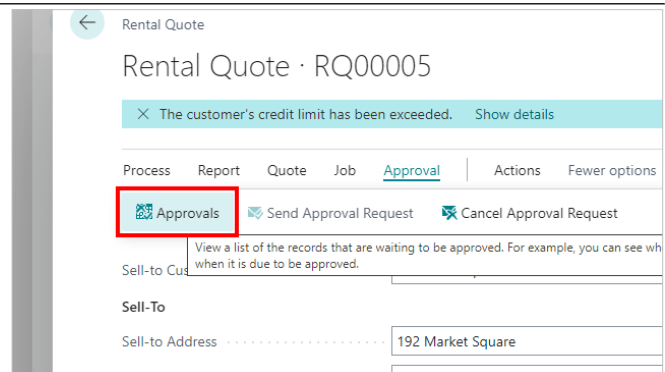
Process Report Quote Job **Approval** Actions Fewer options

General

Sell-to Customer Name Adatum Corporation

Sell-To

Click on the navigation menu item **Approvals**



Rental Quote · RQ00005

× The customer's credit limit has been exceeded. [Show details](#)

Process Report Quote Job **Approvals** Actions Fewer options

Approvals [Send Approval Request](#) [Cancel Approval Request](#)

View a list of the records that are waiting to be approved. For example, you can see wh
when it is due to be approved.

Sell-to Customer Adatum Corporation

Sell-To

Sell-to Address 192 Market Square

Approval Entries on the rental document

Parent Queue

View - Approval Entries

Search

Delegate

Record

Comments

Actions

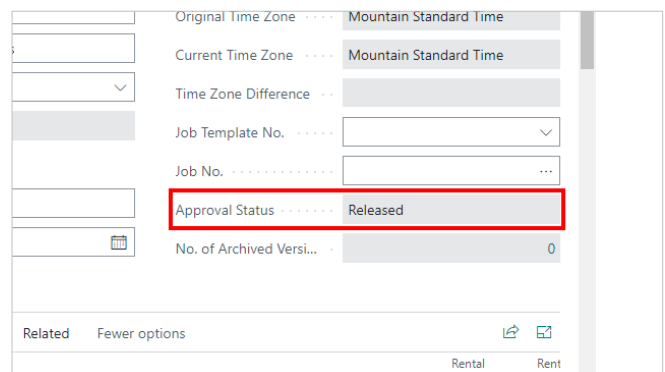
Related

Fewer options

Overdue	Limit Type	Approval Type	To Approve	Details	Sequence No.	Status	Sender ID	Salesperson Code	Approver ID	
		Approval L...	Sales Pers...	Rental Contract Header Rental...	Adatum Corporation Contract...	1	Open	ODTASTAPLET...	JO	ODT/TEST01

If the Approver, approves the request, then the Approval Status field on the document, General Tab, will be updated to Released. The user can then process the rental quote as per the normal processing procedures.

Click on **Approval Status Released**



Original Time Zone Mountain Standard Time

Current Time Zone Mountain Standard Time

Time Zone Difference

Job Template No.

Job No.

Approval Status Released

No. of Archived Versi... .. 0

Related Fewer options

Rental Rent

If the Approver rejects the request, then the Approval Status field on the document, General Tab, will be re-set to Open.

The user who requested the approval will then follow the organizations policy or procedures related to rejected approval requests.

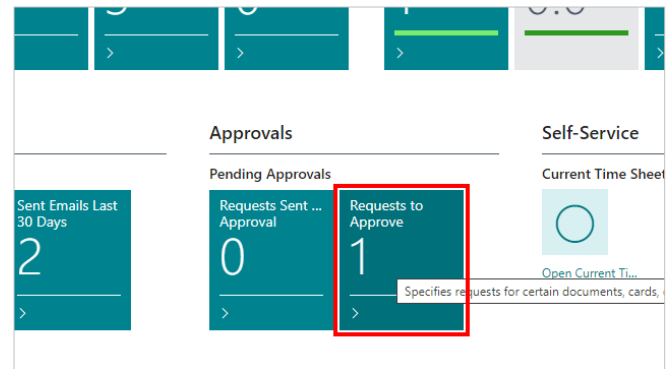
4.22.3.3. How to Process the Approval by the Approver

The following demonstrates the various places that the approver can view and approve, reject, or delegate the approval request for the rental documents.

- The User Role Center
- The Approval Entries
- The rental document

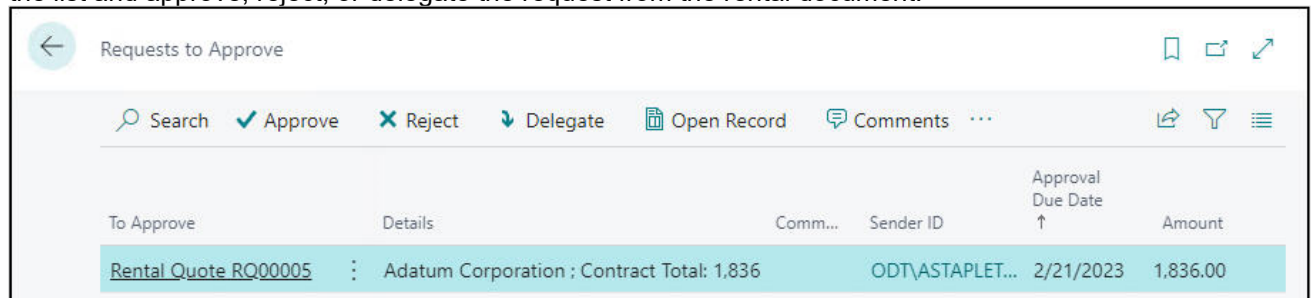
The following demonstrates accessing the approval requests waiting for the approver to approve from the approvers' role center.

Click on the link **Specifies requests for certain documents, cards, or journal lines that you must approve for other users before they can proceed.**

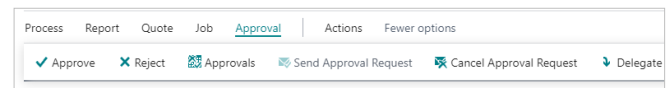


The following picture displays the list of Requests to Approve from the cue that the approver needs to review and process the approval request.

The approver can approve, reject, or delegate the request from the list. Or can open the rental document from the list and approve, reject, or delegate the request from the rental document.



Approver Menu Options on the Rental Document



- To approve the request, select Approve.
- To reject the request, select Reject.
- To delegate the request, select Delegate.

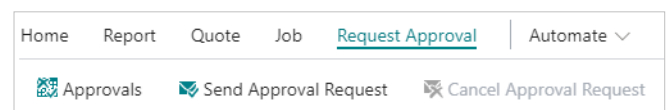
4.22.4. ODT Rentals Rental Document Approval Menus

The Menus and Menu Options in the Global Release 10.0.1.2 are different than the North American Release 10.0.0.2.

In the next ODT Rentals North American release the menus and sub-menu options will be updated to be the same as the ODT Rentals Global version.

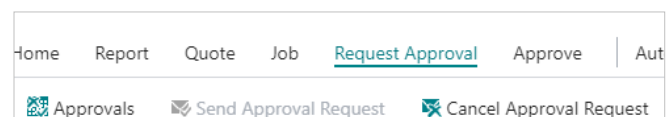
The following displays the ODT Rentals Global approval menus and sub-menu options on the rental documents.

Global Requestor Menu and Sub-Menu Options



The following demonstrates the Global Approvers' Menu options and sub-menu options from the rental document.

Request Approval Menu and Sub-Menu Options





Approve Menu and Sub-Menu Options

Home	Report	Quote	Job	Request Approval	Approve
<div>✓ Approve ✕ Reject ↘ Delegate</div>					

4.23.Rentals Interaction Logging

4.23.1. Interaction Logging Overview

ODT Rentals provides the Interaction logging functionality for Email and Send of Rental Quotes and Rental Contracts using the Dynamics 365 Business Central Interaction Logging.

The Interaction Log Entries can be accessed from the Rental Quote, Completed Rental Quote, Rental Contract and Completed Rental Contract on the Related – History menu option.

The standard setups of Email, a Document Sending Profile for Email which is assigned to the Customer cards, and email addresses on the Customer Contacts are required.

Setups required for the Rental Quotes and Rental Contracts include:

- An Interaction Group named RENTAL
- Interaction Templates named R_QUOTE and R_CONTRACT
- Addition of the templates to the Interaction Templates Setup

When the Interaction Group of SALES and the Interaction Template for the Sales Credit Memo, S_C_MEMO are configured and added to the Interaction Template Setup, then if the Rental Auto Credit Memo is set to Manual on Rental Management Setup and Post and Send is selected on the Credit Memo the email will be sent and the Interaction Log Entry will be created.

4.23.2. How to Setup Rental Interaction Logging

4.23.2.1. Overview

Setups required for the Rental Quotes and Rental Contracts include:

- An Interaction Group named RENTAL
- Interaction Templates named R_QUOTE and R_CONTRACT
- Addition of the templates to the Interaction Templates Setup

The setup of the Email, a Document Sending Profile for Email which is assigned to the Customer cards, and email addresses on the Customer Contacts are not covered here.

For information on the setup of the Email and a Document Sending Profile for Email, please review the Microsoft Dynamics Business Central help.

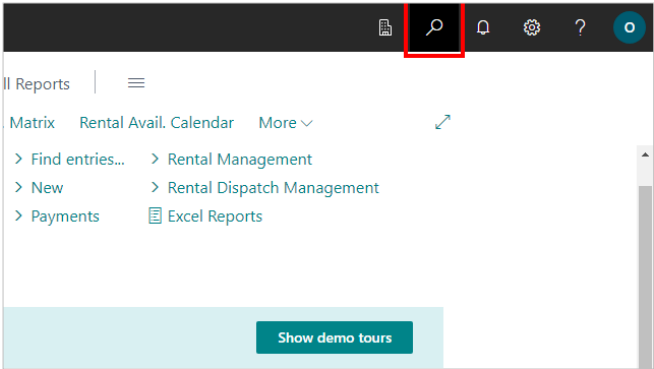
4.23.2.2. How to Setup the Rentals Interaction Group

The following example demonstrates setting up the Interaction Group, RENTAL.

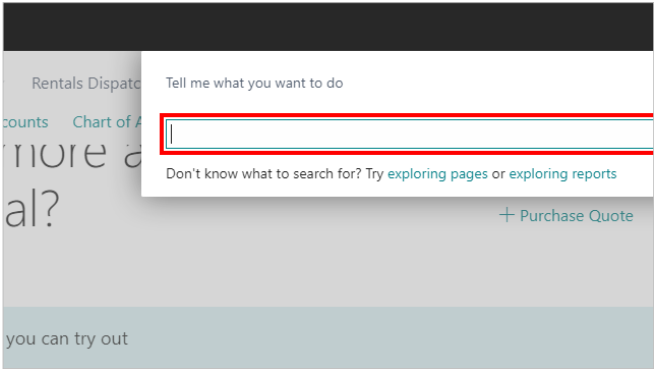


ODT Rentals Online Help

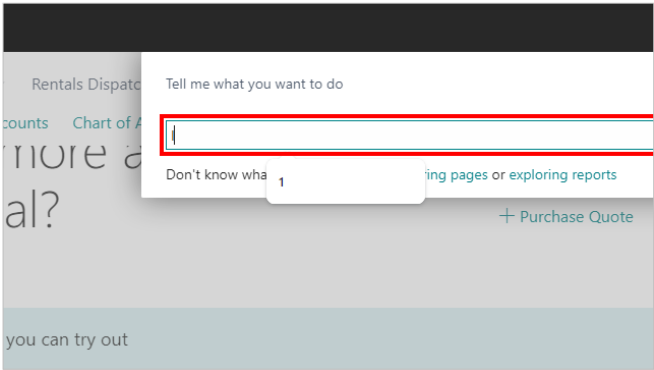
Click on the button **Search**



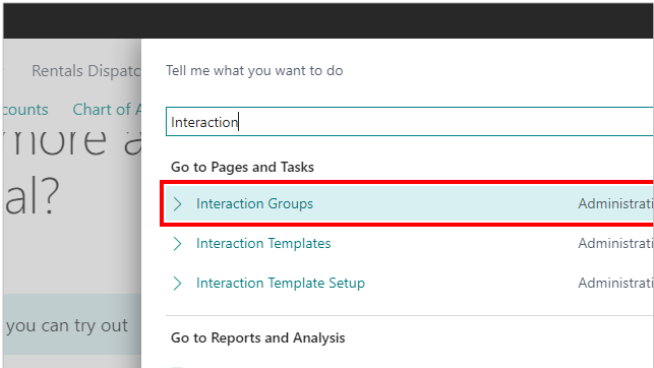
Click on the field **Tell me what you want to do**



Enter **Tell me what you want to do**.



Click on **Interaction Groups Administration** ☐





ODT Rentals Online Help

Click on the navigation menu item **New**

The screenshot shows the 'Interaction Groups' page. At the top, there is a navigation bar with a back arrow, a search icon, a toggle for 'Analyze', and buttons for '+ New', 'Edit List', 'Delete', and 'Statistics'. The '+ New' button is highlighted with a red box. Below the navigation bar, there is a table with columns 'Code' and 'Description'. The first row is highlighted in blue and contains the text 'LETTER' and 'Letters'. Other rows include 'MEETING', 'PHONE', 'PURCHASES', and 'SALES'.

Click on the cell **Code**

The screenshot shows the 'Interaction Groups' page. The 'Code' cell in the first row of the table is highlighted with a red box. The table has columns 'Code' and 'Description'. The first row is highlighted in blue and contains the text 'LETTER' and 'Letters'. Other rows include 'MEETING', 'PHONE', 'PURCHASES', and 'SALES'.

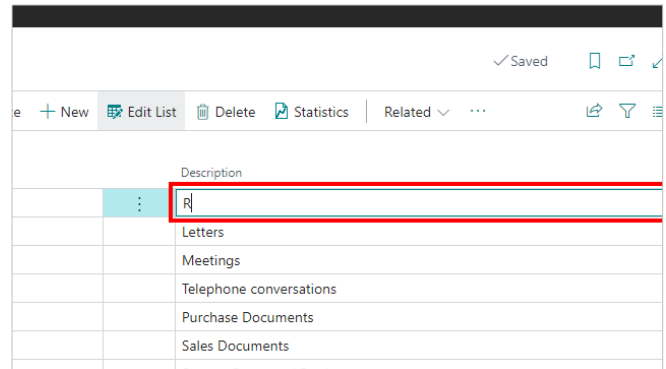
Enter the text **RENTAL**.

The screenshot shows the 'Interaction Groups' page. The 'Code' cell in the first row of the table is highlighted with a red box and contains the text 'RENTAL'. The table has columns 'Code' and 'Description'. The first row is highlighted in blue and contains the text 'RENTAL' and 'Letters'. Other rows include 'MEETING', 'PHONE', 'PURCHASES', and 'SALES'.

Click on the cell **Description**

The screenshot shows the 'Interaction Groups' page. The 'Description' cell in the first row of the table is highlighted with a red box. The table has columns 'Code' and 'Description'. The first row is highlighted in blue and contains the text 'RENTAL' and 'Letters'. Other rows include 'MEETING', 'PHONE', 'PURCHASES', and 'SALES'.

Enter the text **Rental Documents**.

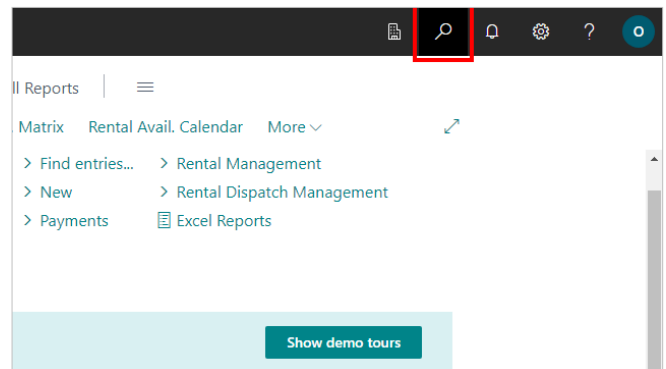


A screenshot of a web application's search interface. At the top, there's a search bar with a magnifying glass icon. Below it, a dropdown menu is open, showing a list of suggestions. The first suggestion, 'Rental Documents', is highlighted with a red rectangular box. Other suggestions include 'Letters', 'Meetings', 'Telephone conversations', 'Purchase Documents', and 'Sales Documents'.

4.23.2.3. How to Setup the Rental Interaction Templates

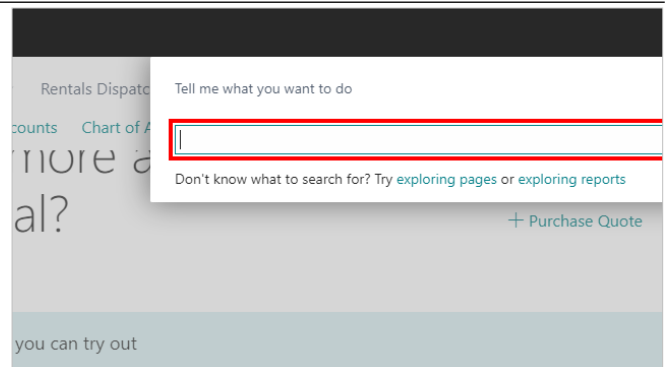
The following demonstrates setting up the Interaction Template called R_QUOTE, for the Rental Quote.

Click on the button **Search**



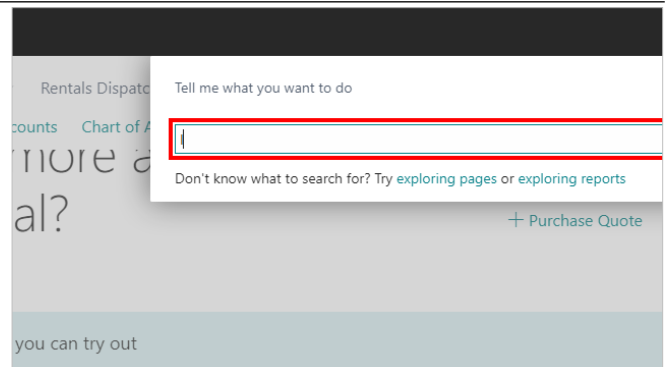
A screenshot of the application's main menu. The 'Search' button, represented by a magnifying glass icon, is highlighted with a red rectangular box in the top navigation bar. Below the navigation bar, there's a sidebar with various menu items like 'Matrix', 'Rental Avail. Calendar', 'Find entries...', 'New', 'Payments', 'Rental Management', 'Rental Dispatch Management', and 'Excel Reports'. A 'Show demo tours' button is visible at the bottom right of the sidebar.

Click on the field **Tell me what you want to do**



A screenshot of the search input field. The text 'Tell me what you want to do' is displayed above the input field, which is highlighted with a red rectangular box. Below the input field, there's a suggestion: 'Don't know what to search for? Try exploring pages or exploring reports'. A '+ Purchase Quote' button is visible on the right side of the input field.

Enter the text **Interaction** .



A screenshot of the search input field. The text 'Interaction' is entered into the input field, which is highlighted with a red rectangular box. Below the input field, there's a suggestion: 'Don't know what to search for? Try exploring pages or exploring reports'. A '+ Purchase Quote' button is visible on the right side of the input field.



ODT Rentals Online Help

Click on **Interaction Templates Administration** ☐

Rentals Dispatch

counts Chart of A
more a
al?
you can try out

Tell me what you want to do

Interaction

Go to Pages and Tasks

> Interaction Groups

Administration

> Interaction Templates

Administration

> Interaction Template Setup

Administration

Go to Reports and Analysis

Interaction Log Entries

Archive

Click on the navigation menu item **New**

Dynamics 365 Business Central

Interaction Templates

Search Analyze **+ New** Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→ ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Click on the cell **Code**

Interaction Templates

Search Analyze + New Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→			
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Enter the text **R_QUOTE**.

Interaction Templates

Search Analyze + New Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→			
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	



Click on the cell **Interaction Group Code**

Interaction Templates			
Search Analyze + New Edit List Delete Attachment			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_QUOTE			
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Click on the link in cell **Code** with the value **RENTAL**

Interaction Templates			
Search Analyze + New Edit List Delete Attachment			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_QUOTE			
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Code ↑

Description

LETTER

Letters

MEETING

Meetings

PHONE

Telephone conversations

PURCHASES

Purchase Documents

RENTAL

Rental Documents

+ New

Select record "RENTAL"

Show d

Click on the cell **Description**

Interaction Templates			
Search Analyze + New Edit List Delete Attachment Create Int			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_QUOTE	RENTAL		
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Enter the text **Rental Quote**.

Interaction Templates			
Search Analyze + New Edit List Delete Attachment Create Int			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_QUOTE	RENTAL		
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	
EMAIL_D	SYSTEM	Email Draft	

Click on the item **Us** in the list

Fewer options

Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	Campaign No.	Cam... Target	Cam... Resp...
8.00	1	Outbound	▼		<input type="checkbox"/>	<input type="checkbox"/>
8.00	90	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	30	Outbound	Th...		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>

The following demonstrates setting up the Interaction Template called **R_CONTRACT**, for the Rental Contract.

Click on the navigation menu item **New**

Dynamics 365 Business Central

Interaction Templates

Search Analyze **+ New** Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→ R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	

Click on the cell **Code**

Interaction Templates

Search Analyze + New Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→			
R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	

Enter the text **R_CONTRACT**.

Interaction Templates

Search Analyze + New Edit List Delete Attachment

Code ↑	Interaction Group Code	Description	Wo Co
→			
R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	



Click on the cell **Interaction Group Code**

Interaction Templates			
<div>Search Analyze + New Edit List Delete Attachment</div>			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_CONTRACT	RENTAL		
R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	

Click on the link in cell **Code** with the value **RENTAL**

Code ↑	Description
R_QUOTE	
ABSTRACT	
BUS	LETTER Letters
COVERSH	MEETING Meetings
EMAIL	PHONE Telephone conversations
EMAIL_D	PURCHASES Purchase Documents
GOLF	RENTAL Rental Documents
INCOME	
INHOUSE	MEETING meeting held at CROWNOS
MEETINV	SYSTEM Meeting Invitation
ONSITE	MEETING Meeting at the customers site
OUTGOING	PHONE Outgoing phone call

Click on the cell **Description**

Interaction Templates			
<div>Search Analyze + New Edit List Delete Attachment Create Int</div>			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_CONTRACT	RENTAL		
R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	

Enter the text **Rental Contract**.

Interaction Templates			
<div>Search Analyze + New Edit List Delete Attachment Create Int</div>			
Code ↑	Interaction Group Code	Description	Word Template Code
→ R_CONTRACT	RENTAL		
R_QUOTE	RENTAL	Rental Quote	
ABSTRACT	LETTER	Abstracts of meeting	
BUS	LETTER	Business letter	
COVERSH	SYSTEM	Coversheet	
EMAIL	SYSTEM	Emails	



ODT Rentals Online Help

Enter the text 1.

s | Related ▾ Automate ▾ Fewer options							
Language Code (default)	Attach...	Ignore Cont... Corr... Type	Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	C
	No	<input type="checkbox"/>	8.00	<input type="text" value="1"/>			
	No	<input type="checkbox"/>	8.00	1	Outbound	Us	
	No	<input checked="" type="checkbox"/>	8.00	90	Outbound		
	No	<input checked="" type="checkbox"/>	8.00	30	Outbound	Us	
	No	<input type="checkbox"/>	8.00	1	Outbound	Us	
	No	<input type="checkbox"/>	8.00	1	Outbound	Us	

Click on the cell **Information Flow**

✓ Saved							
Automate ▾ Fewer options							
Language Code (default)	Attach...	Ignore Cont... Corr... Type	Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	Campaign No.
	<input type="checkbox"/>		8.00	<input type="text" value="1"/>			
	<input type="checkbox"/>		8.00	1	Outbound	Us	
	<input checked="" type="checkbox"/>		8.00	90	Outbound		
	<input checked="" type="checkbox"/>		8.00	30	Outbound	Us	
	<input type="checkbox"/>		8.00	1	Outbound	Us	
	<input type="checkbox"/>		8.00	1	Outbound	Us	

Click on the item **Outbound** in the list

✓ Saved							
Automate ▾ Fewer options							
Language Code (default)	Attach...	Ignore Cont... Corr... Type	Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	Campaign No.
	<input type="checkbox"/>		8.00	1	<input type="text" value="Outbound"/>	Us	
	<input type="checkbox"/>		8.00	1	Outbound		
	<input checked="" type="checkbox"/>		8.00	90	Inbound		
	<input checked="" type="checkbox"/>		8.00	30	Outbound	Us	
	<input type="checkbox"/>		8.00	1	Outbound	Us	
	<input type="checkbox"/>		8.00	1	Outbound	Us	

Click on the cell **Initiated By**

✓ Saved							
Fewer options							
Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	Campaign No.	Cam... Target	Cam... Resp...	
8.00	1	Outbound	<input type="text" value="Us"/>		<input type="checkbox"/>	<input type="checkbox"/>	
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>	
8.00	90	Outbound			<input type="checkbox"/>	<input type="checkbox"/>	
8.00	30	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>	
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>	
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>	

Click on the item **Us** in the list

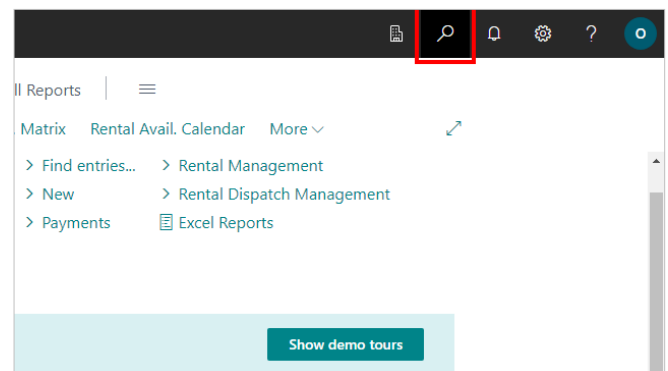
Fewer options

Unit Cost (\$)	Unit Duration (Min.)	Information Flow	Initiated By	Campaign No.	Cam... Target	Cam... Resp...
8.00	1	Outbound	▼		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	90	Outbound	The		<input type="checkbox"/>	<input type="checkbox"/>
8.00	30	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>
8.00	1	Outbound	Us		<input type="checkbox"/>	<input type="checkbox"/>

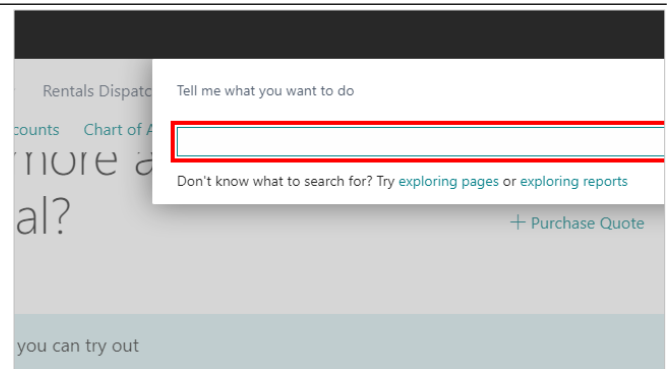
4.23.2.4. How to Update the Interaction Template Setup for Rentals

The following demonstrates the updating of the Interaction Template Setup with the rental templates.

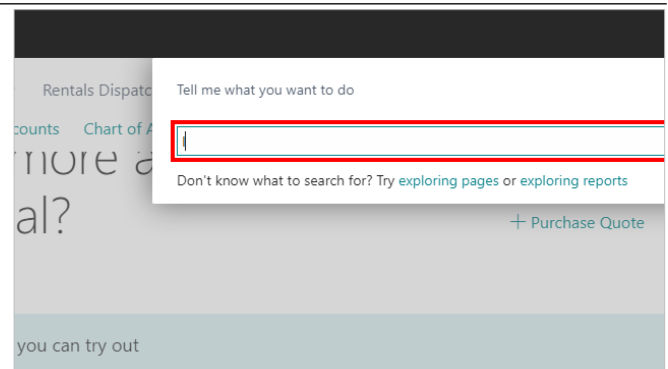
Click on the button **Search**



Click on the field **Tell me what you want to do**



Enter the text **Interaction**.





ODT Rentals Online Help

Click on **Interaction Template Setup Administration**

Interaction

Go to Pages and Tasks

- > Interaction Groups Administration
- > Interaction Templates Administration
- > **Interaction Template Setup Administration**

Go to Reports and Analysis

- > Interaction Log Entries Archive

Search for 'Interaction'

Click on the lookup button **Rental Quote**

Rental Quote

Click on the link in cell **Code** with the value **R_QUOTE**

Rental Quote

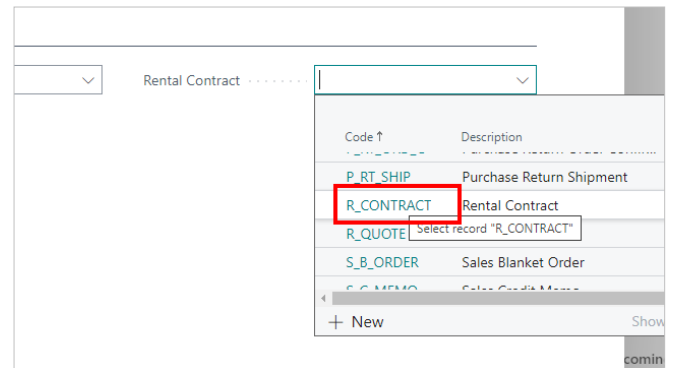
Code	Description
P_RT_ORD_C	Purchase Return Order Confir...
P_RT_SHIP	Purchase Return Shipment
R_CONTRACT	Rental Contract
R_QUOTE	Rental Quote

+ New Show

Click on the lookup button **Rental Contract**

Rental Contract

Click on the link in cell **Code** with the value **R_CONTRACT**



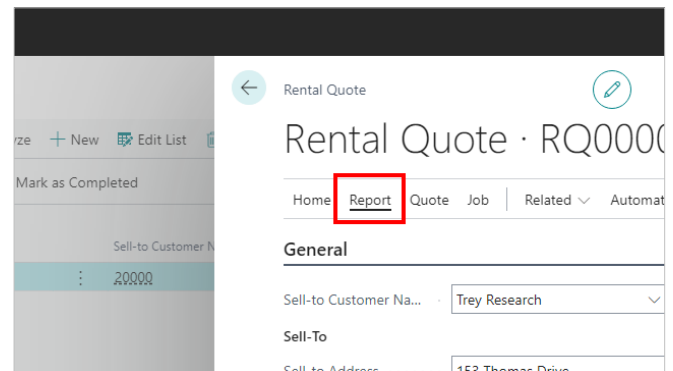
Code	Description
P_RT_SHIP	Purchase Return Shipment
R_CONTRACT	Rental Contract
R_QUOTE	select record "R_CONTRACT"
S_B_ORDER	Sales Blanket Order
S_C_MEMO	Sales Credit Memo
+ New	

4.23.3. How to Process Rentals with Interaction Logging

4.23.3.1. How to Process and Review a Rental Quote Interaction Using Send

The following demonstrates the Rental Quote process steps for interaction logging using Send and a review of the interaction log entries.

Click on the navigation menu item popup **Report**



Rental Quote · RQ0000

Home **Report** Quote Job Related Automate

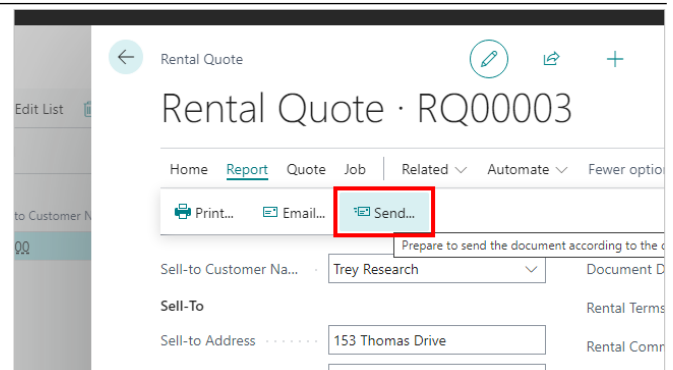
General

Sell-to Customer Na... Trey Research

Sell-To

Sell-to Address 153 Thomas Drive

Click on the navigation menu item **Send...**



Rental Quote · RQ00003

Home Report Quote Job Related Automate Fewer options

Print... Email... **Send...**

Prepare to send the document according to the

Sell-to Customer Na... Trey Research

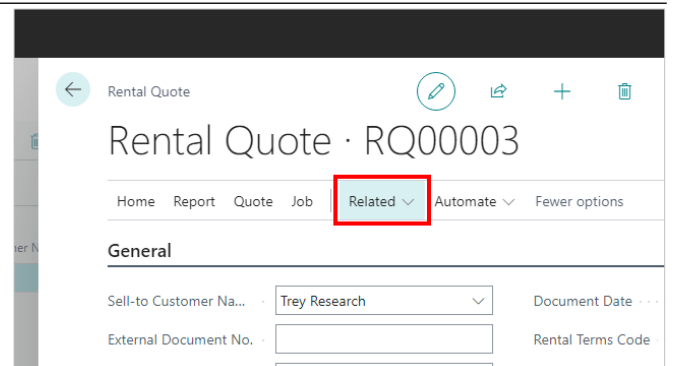
Sell-To

Sell-to Address 153 Thomas Drive

Rental Terms

Rental Com

Click on the navigation menu item popup **Related**



Rental Quote · RQ00003

Home Report Quote Job **Related** Automate Fewer options

General

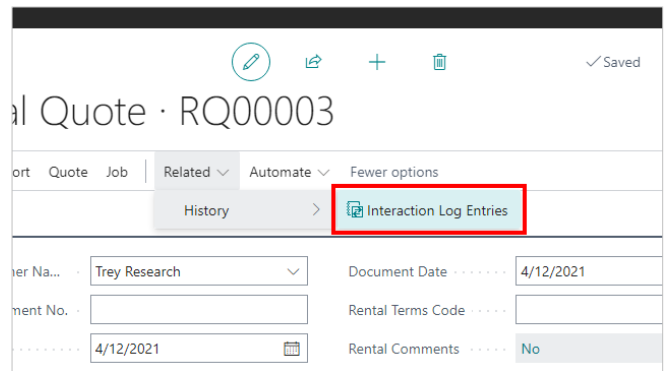
Sell-to Customer Na... Trey Research

External Document No.

Document Date

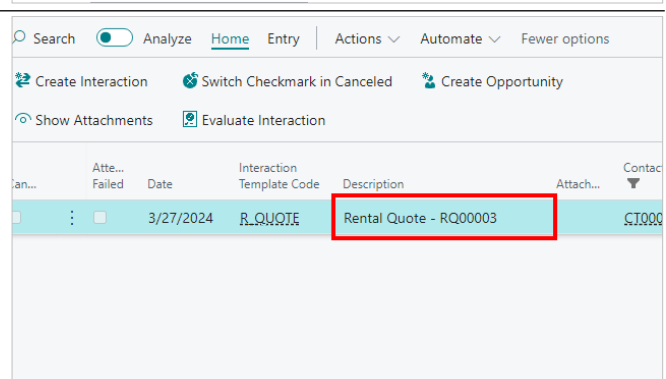
Rental Terms Code

Click on the navigation menu item **Interaction Log Entries**



Click on the cell **Description** with the value **Rental Quote - RQ00003**

Note that the interaction log entry was created for the Rental Quote.



Interaction Template Code	Description	Attach...	Contact
R-QUOTE	Rental Quote - RQ00003		CT000

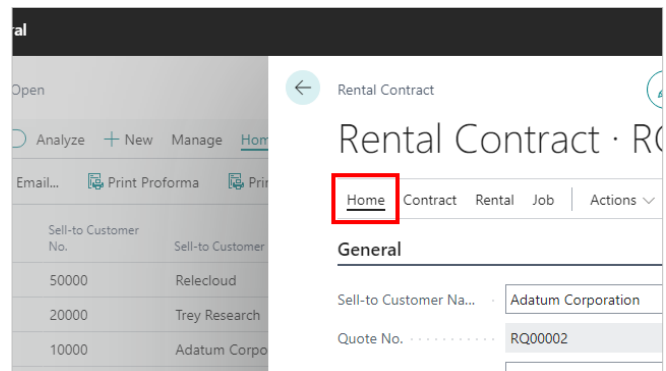
4.23.3.2.

How to Process and Review a Rental Contract Interaction

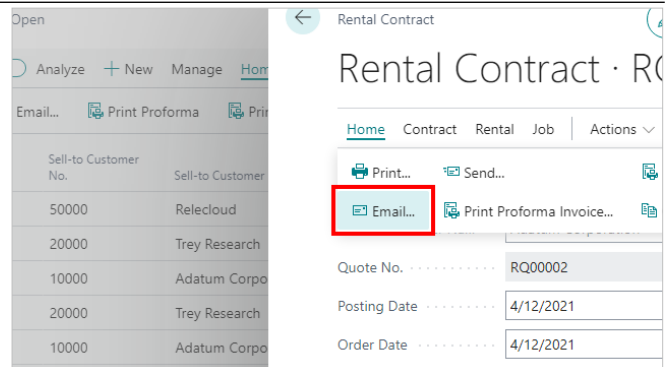
Using Mail

The following demonstrates the Rental Contract process steps for interaction logging using Email and a review of the interaction log entries.

Click on the navigation menu item popup **Home**



Click on the navigation menu item **Email...**



Click on the navigation menu item **Send email**

CRONUS Rentals Inc. - Rental Contract RC00020

Send email Discard draft Use Word template Show source document Page

Email details

From Anna Stapleton (astapleton@opendoorerp.com)

To [Redacted]

Subject CRONUS Rentals Inc. - Rental Contract RC00020

Click on the navigation menu item popup **Related**

Rental Contract

Rental Contract · RC00020

Home Contract Rental Job Actions **Related** Automate Fewer options

General

Sell-to Customer Name Adatum Corporation Rental Comments No

Quote No. RQ00002 Deposit Amount [Redacted]

Click on the navigation menu item **Interaction Log Entries**

tract · RC00020

Job Actions **Related** Automate Fewer options

Contract History **Interaction Log Entries** Show more

Adatum Corporation Rental Comments View a list of interaction log entries related to this contract.

Quote No. RQ00002 Deposit Amount 0.00

12/2021 Contract Total 1,011.80

12/2021 Outstanding Amount 1,011.80

Click on the cell **Description** with the value **Rental Contract - RC00020**

Note that the interaction log entry was created for the Rental Contract.

Search Analyze Home Entry Actions Automate Fewer options

Create Interaction Switch Checkmark in Canceled Create Opportunity

Show Attachments Evaluate Interaction

Interaction Template Code	Description	Attach...	Contact
R.CONTRACT	Rental Contract - RC00020		ST000

4.24.Global Additional Rental Processes

4.24.1. Processing Rentals Using Price Incl.VAT

4.24.1.1. Rentals Price Including VAT Overview

4.24.1.1.1. Overview

Some organizations using the Rest of World version of Microsoft Dynamics 365 Business Central, sell and rent product with the price including VAT.



ODT Rentals includes the functionality to rent product using prices including VAT. The configuration is similar to the setups and processing of sales using prices including VAT.

The Rental Units, Rental Price cards and rental documents have been enhanced to include the Price Incl. VAT functionality.

When a Customer is configured for Price Incl. VAT, then on the rental documents the Rental Line and Sales Line amount fields will display the amounts as including VAT. Additionally, the Rental Amount Lines and Rental Value Entries, will display the amount fields as including VAT.

The Rental Quote, Contract, Proforma and Posted Rental Invoices have been enhanced to print similar to the sales documents, when prices are including VAT.

4.24.1.1.2. Rental Setups for Price Including VAT

Setup for using Price Incl. VAT consists of the following:

- Configuring the Customer
- Setting up rental unit groups and units
- Setting up rental price cards

For information on these setups, see the related help in Price Including VAT for Rentals.

NOTE:

Ensure that the General Product Posting Group used for rentals contains a Def. VAT Prod. Posting Group.

4.24.1.2. How to Set Up a Customer for Price Incl. VAT

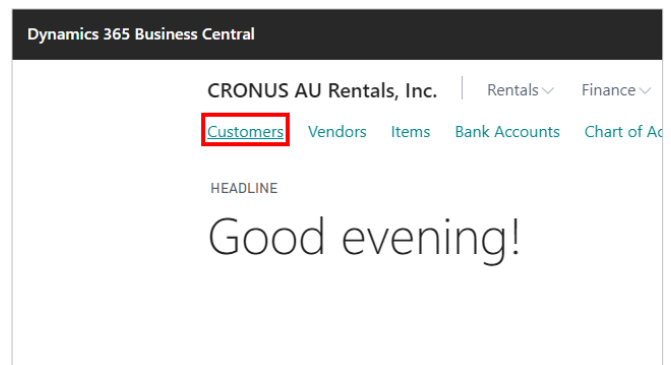
4.24.1.2.1. Overview

In order to process rentals using Prices including VAT, it is mandatory that the Customer card have the Prices Including VAT enabled.

The following demonstrates how to enable the Prices Including VAT on a Customer card.

4.24.1.2.2. How to Setup a Customer for Price Including VAT

Click on the navigation menu item **Customers**



Click on the link in cell **No.** with the value **50000**

No. ↑	Name	Responsibility Center	Lo
10000	Adatum Corporation		
20000	Trey Research		
30000	School of Fine Art		
40000	Alpine Ski House		
50000	Relecloud		

Open record "50000"

Click on the toggle field Prices Including VAT

...	Currency Code	.....	▼
	Customer Price Group	.....	▼
▼	Customer Disc. Group	.....	▼
▼	Allow Line Disc.	<input type="checkbox"/>
0	Invoice Disc. Code	.....	50000 ▼
	Prices Including VAT	<input checked="" type="checkbox"/>

Click on the back button

Dynamics 365 Business Central

← CUSTOMER CARD | WORK DATE: 4/1/2019

50000 · Relecloud

New Document Request Approval Navigate Customer

General

No. 50000

Name Relecloud

4.24.1.3. How to Set Up Rental Units for Price Incl. VAT

4.24.1.3.1. Overview

In order to rent out product with pricing including VAT, the Rental Unit card must have the Price Include VAT field enabled.

When a Rental Unit Group is created, and has the Price Include VAT enabled, then any units assigned to the group will automatically have the Price Include VAT enabled.

When an existing Rental Unit Group with units assigned has the Price Include VAT enabled, then any units already assigned to the group will automatically have the Price Include VAT enabled.

4.24.1.3.2. How to Set Up Rental Units with Price Incl VAT

The following demonstrates the setup of a Rental Unit Group with the Price Include VAT being enabled.



Click on the navigation menu item **Rental Units**

Click on the navigation menu item **New**

Click on the field **No.**

Enter the text **RU00100**.



Click on the field **Description**

Rental Unit Card

Process Rental More options

General

No. RU00100 ...

Description

Serial No.

Location Code ▾

Posting

Enter the text **Compactor Group**.

RU00100

Process Rental More options

General

No. RU00100 ...

Description d

Serial No.

Location Code ▾

Posting

Click on the field **Gen. Prod. Posting Group**

Description Compactor Group

Serial No.

Location Code ▾

Posting

Gen. Prod. Posting Group ▾

VAT Prod. Posting Group Look up value ▾

Rental >

Click on the link in cell **Code** with the value **RENTALS**

VAT Prod. Posting Group 4/20/2019

Rental >

Link >

→ FREIGHT	Freight, etc.
MISC	Miscellaneous with GST
NO GST	Miscellaneous without GST
RAW MAT	Raw Materials
RENTALS	Rentals
Select record "RENTALS"	
+ New	



ODT Rentals Online Help

Click on the field **VAT Prod. Posting Group**

Serial No.

Location Code

Posting

Gen. Prod. Posting Group RENTALS

VAT Prod. Posting Group Look up value

Rental >

Link >

Click on the link in cell **Code** with the value **GST15**

Gen. Prod. Posting Group RENTALS

VAT Prod. Posting Group 5/19/2019

Rental >

Link >

→ ASSET	Asset with 10% GST
GST10	Miscellaneous 10 GST
GST15	Miscellaneous 15 GST
INR	Select record GST15 Input Taxed
NO GST	Miscellaneous without GST
+ New	

Click on the toggle field Price Includes VAT

Inactive ☐

Price Includes VAT ☒

Group Qty. To Rent 0.00

Click on the toggle field Group

Gen. Prod. Posting Group RENTALS

VAT Prod. Posting Group GST15

Rental

Group ☒

Group No.

Sub Rental ☐

Allow Overbooking ☐

Rental Terms Code



ODT Rentals Online Help

Click on the toggle field Allow Overbooking

Rental

Group ☒

Group No. RU00100 ...

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Click on the field **Rental Terms Code**

Group ☒

Group No. RU00100 ...

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Click on the link in cell **Code** with the value **MONTH-PEND**

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Code	Description
→ DAY-PEND	Daily Rental
MONTH-PEND	Monthly Rental
WEEK-	Select record "MONTH-PEND"

+ New

Link >

Click on the field **Minimum Rental Duration**

Group ☒

Group No. RU00100 ...

Sub Rental ☐

Allow Overbooking ☒

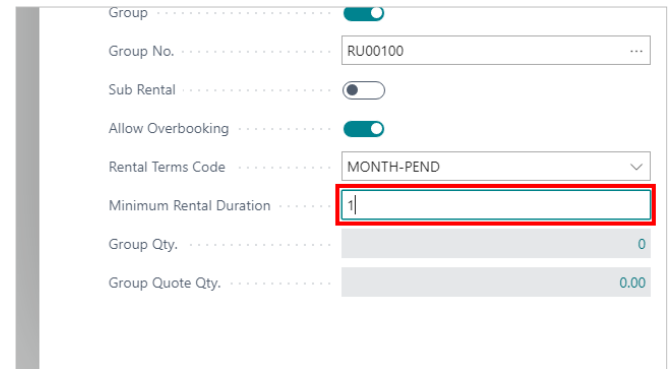
Rental Terms Code MONTH-PEND

Minimum Rental Duration

Group Qty. 0

Group Quote Qty. 0.00

Enter the text **1 day**.



Group ☒

Group No. RU00100

Sub Rental ☐

Allow Overbooking ☒

Rental Terms Code MONTH-PEND

Minimum Rental Duration 1

Group Qty. 0

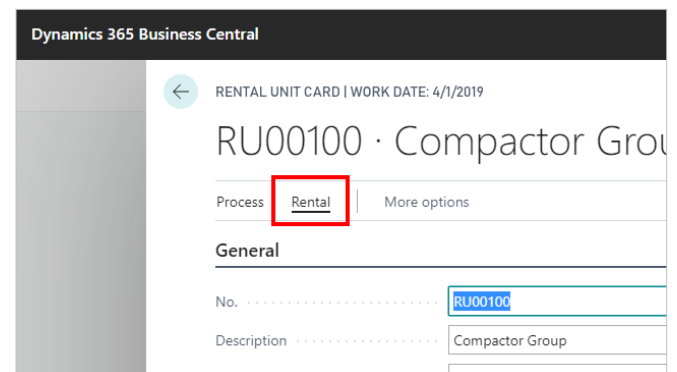
Group Quote Qty. 0.00

4.24.1.3.3.

How to Set Up Rental Prices with Price Incl VAT

The following demonstrates the setup of a Rental Unit Group with the Price Include VAT being enabled.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

RENTAL UNIT CARD | WORK DATE: 4/1/2019

RU00100 · Compactor Group

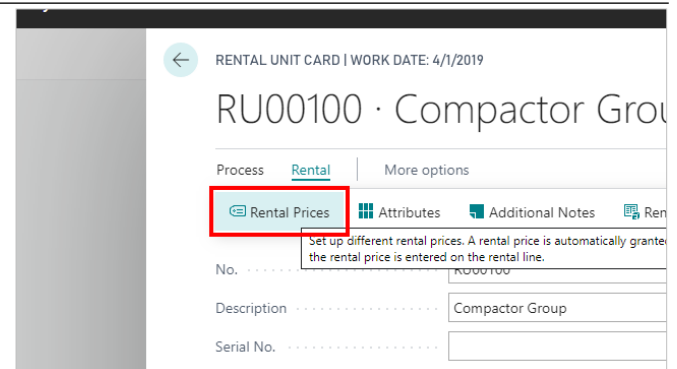
Process **Rental** More options

General

No. RU00100

Description Compactor Group

Click on the navigation menu item **Rental Prices**



Dynamics 365 Business Central

RENTAL UNIT CARD | WORK DATE: 4/1/2019

RU00100 · Compactor Group

Process **Rental** More options

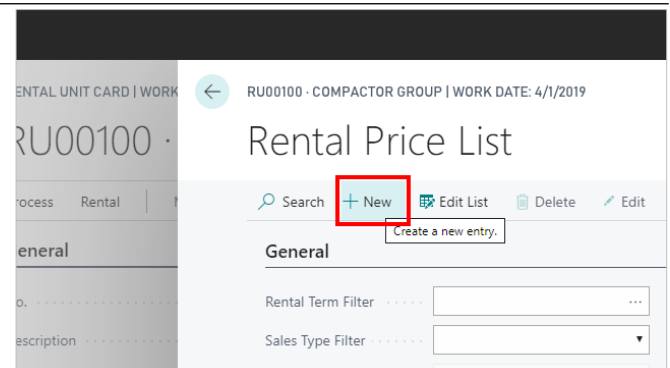
Rental Prices Attributes Additional Notes

No. RU00100

Description Compactor Group

Serial No.

Click on the navigation menu item **New**



RENTAL UNIT CARD | WORK DATE: 4/1/2019

RU00100 · COMPACTOR GROUP | WORK DATE: 4/1/2019

Rental Price List

Search **+ New** Edit List Delete Edit

General

Rental Term Filter

Sales Type Filter



Click on the field **Rental Terms Code**

Click on the link in cell **Code** with the value **MONTH-PEND**

Click on the field **Price**

Enter the text **2000**.



Click on the button **Show more**

This screenshot shows a portion of the Rental Price card interface. A red box highlights a button labeled "Show more" located at the top right of the card's details section. Below the button, there are input fields for "Price" (set to 2000), "Optimize" (set to Never), and "Prorate" (set to Never), along with a toggle for "Allow Line Disc." which is currently turned on.

Click on the field **Price Excluding VAT**

The Price Excluding VAT is automatically calculated based on the VAT Product Posting Group on the Rental Price card.

This screenshot shows the Rental Price card with the "Price Excluding VAT" field highlighted by a red box. The value displayed is 1,739.13. Other visible fields include "Price Includes VAT" (1,739.13), "Optimize" (Never), "Prorate" (Never), and "Allow Line Disc." (turned on). A "Show less" button is visible at the top right of the details section.

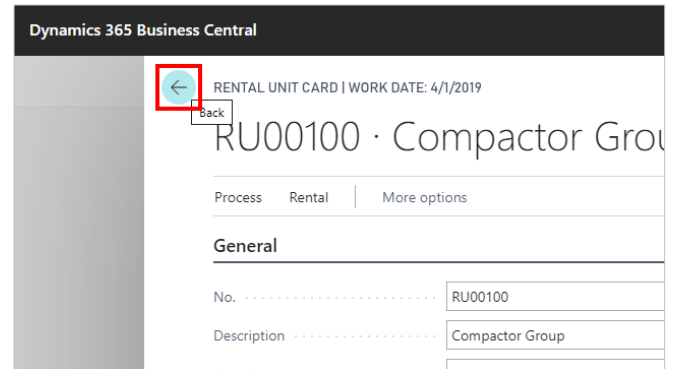
Click on the back button

This screenshot shows the Rental Price card with a red box highlighting the back button (a left-pointing arrow) located at the top left of the card. The card title is "RU00100 · MON". The "General" section is visible, showing fields for "No." (RU00100), "Rental Terms Code" (MONTH-PEND), and "Sales Type" (All Customers).

Click on the back button

This screenshot shows the Rental Price List interface with a red box highlighting the back button (a left-pointing arrow) located at the top left of the list. The list title is "RU00100 · COMPACTOR GROUP | WORK DAT". The "General" section is visible, showing fields for "Rental Term Filter" and "Sales Type Filter" (set to None).

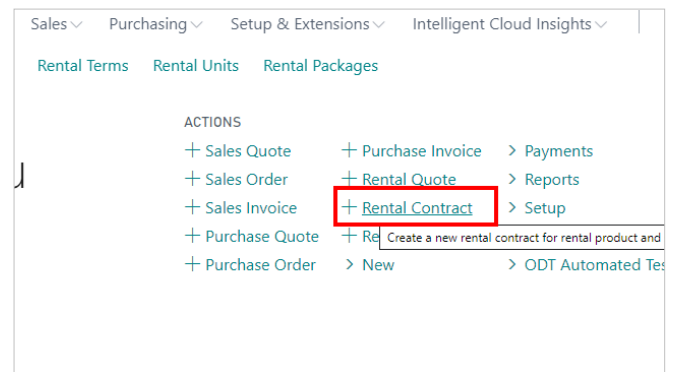
Click on the back button



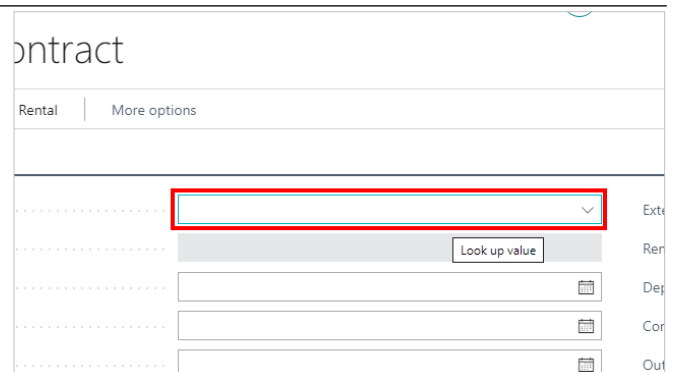
4.24.1.4. How to Process a Contract with Price Incl. VAT

The following demonstrates the processing of a contract with a Customer, Rental Unit and Rental Price with Price Include VAT.

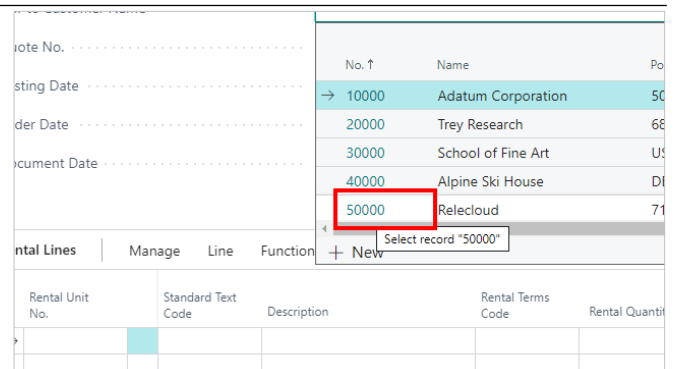
Click on the navigation menu item **Rental Contract**



Click on the field **Sell-to Customer Name**



Click on the link in cell **No.** with the value **50000**



No.	Name	Pos
10000	Adatum Corporation	50
20000	Trey Research	68
30000	School of Fine Art	US
40000	Alpine Ski House	DI
50000	Relecloud	71



Click on the cell **Rental Unit No.**

Document Date 4/1/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description
→		
	Look up value	

Sales Lines | Manage | More options

Click on the lookup button in the cell **Rental Unit No.**

Document Date 4/1/2019

Rental Lines | Manage | Line | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description
→	...	
	Look up value	

Sales Lines | Manage | More options

Click on the link in cell **No.** with the value **RU00100**

RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract

Process | Contract | Rental | More

General

Sell-to Customer Name

Quote No.

Posting Date

RENTAL UNIT LIST

No. ↑	Description
→ RU00100	Compactor Group
RU00100-0...	Compactor
RU00100-0...	Compactor

Click on the cell **Rental Terms Code**

Document Date 4/1/2019

Manage | Line | Functions | Fewer options

Standard Text Code	Description	Rental Terms Code	Rental Quantity	Location Code
	Compactor Group		0	

Manage | More options

Double click on the link in cell **Code** with the value **MONTH-PEND**

Standard Text	Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
	Compactor Group	▼	0		

Code Description

→ DAY-PEND Daily Rental

MONTH-PEND Monthly Rental

WEEK-PEND Select record "MONTH-PEND"

+ New

Description	Location Code	Quantity	Measure Code
		0	

Click on the cell **Rental Quantity** with the value **0**

..... 4/1/2019 Outstanding Amount

Functions Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Compactor Group	MONTH-PEND ▼	0		

tions

Enter the text **1**.

..... 4/1/2019 Outstanding Amount

Functions Fewer options

Description	Rental Terms Code	Rental Quantity	Location Code	Rental Terms Code Alt1
Compactor Group	MONTH-PEND	1		

tions

Note that the price fields on the Rental Line are prices including VAT.

Click on the cell **VAT Prod. Posting Group** with the value **GST15**

Note that the VAT Product Posting Group is displayed on the Rental Line, which defaults from the Rental Price card for the Rental Term selected on the line.

..... Outstanding Amount

Rental Unit Price Incl. VAT	Alt1 Rental Unit Price Incl. VAT	Alt2 Rental Unit Price Incl. VAT	Currency Code	VAT Prod. Posting Group	Qty. to Rent	Qty. on Rent	Qty. to Return	Return
0.00	0.00	0.00		GST15	0	0	0	
0.00	0.00	0.00		GST15 Look up value		0	0	



Click on the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options
Rental Unit No.		Rental Terms Code Alt1		Rental Terms Code Alt2	Rental Start Date
→	RU00100	⋮			4/1/2019
		⋮			4/1/2019
		⋮			
Sales Lines		Manage	More options		

Click on the lookup button in the cell **Rental Unit No.**

Rental Lines		Manage	Line	Functions	Fewer options
Rental Unit No.	Rental Terms Code Alt1	Rental Terms Code Alt2	Rental Start Date		
RU00100			4/1/2019		
→	...	:	4/1/2019		
	Look up value				
Sales Lines		Manage	More options		

Click on the link in cell **No.** with the value **RU00100-001**

RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract

Process

Contract

Rental

More

General

Sell-to Customer Name

Quote No.

Posting Date

Search

Rental

Open in Excel

M

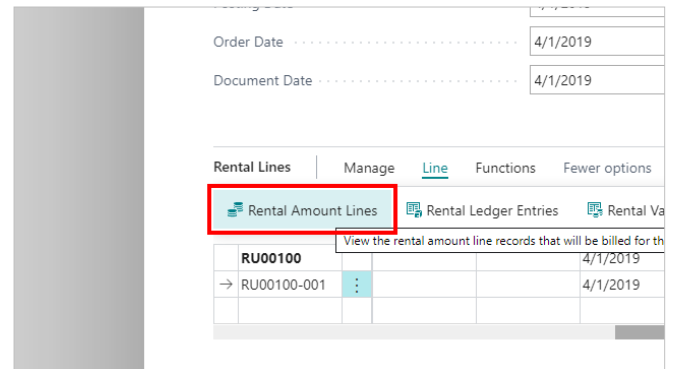
RENTAL UNIT LIST

No. ↑	Description
→ RU00100-0...	Compactor
RU00100-0...	Compactor
RU00100-0...	Compactor

Click on the navigation menu item popup **Line**

Quote No.								
Posting Date					4/1/2019			
Order Date					4/1/2019			
Document Date					4/1/2019			
Rental Lines					Manage	Line	Functions	Fewer options
Rental Unit No.		Rental Terms Code Alt1		Rental Terms Code Alt2	Rental Start Date		Rental Return Date	
RU00100					4/1/2019		4/30/201	
→ RU00100-C					4/1/2019		4/30/201	

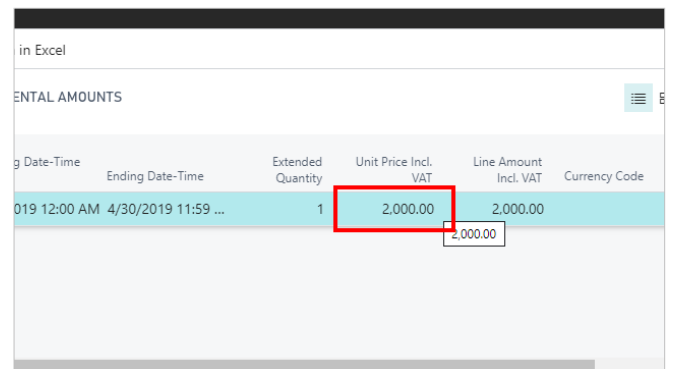
Click on the navigation menu item **Rental Amount Lines**



The screenshot shows the 'Rental Lines' section with a sub-menu 'Rental Amount Lines' highlighted. Below it, a table displays rental lines with columns for 'Rental Lines', 'Manage', 'Line', 'Functions', and 'Fewer options'. A tooltip for 'Rental Amount Lines' states: 'View the rental amount line records that will be billed for th'.

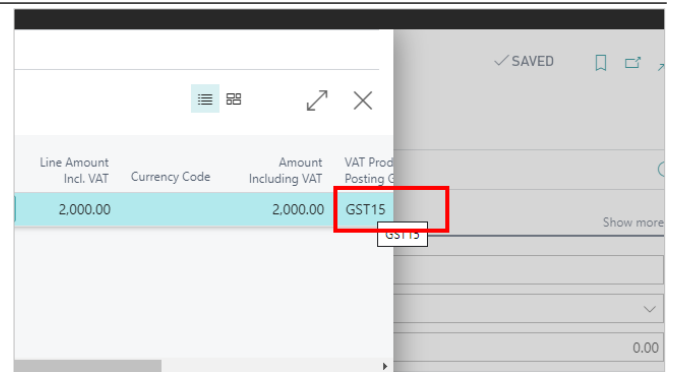
On the Rental Amount Lines the amount fields are including VAT and that the VAT Prod. Posting Group field is displayed.

Click on the cell **Unit Price Incl. VAT** with the value **2,000.00**



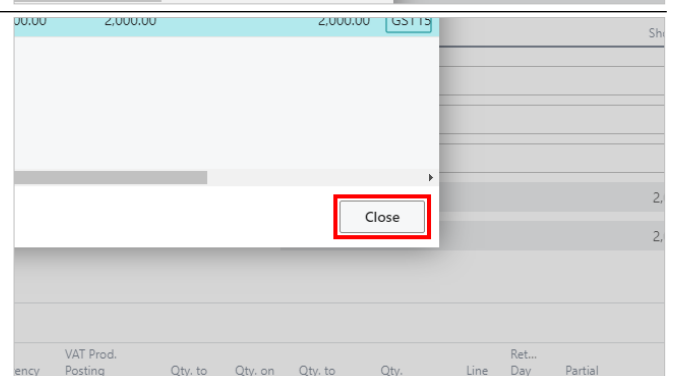
g Date-Time	Ending Date-Time	Extended Quantity	Unit Price Incl. VAT	Line Amount Incl. VAT	Currency Code
019 12:00 AM	4/30/2019 11:59 ...	1	2,000.00	2,000.00	

Click on the cell **VAT Prod. Posting Group** with the value **GST15**



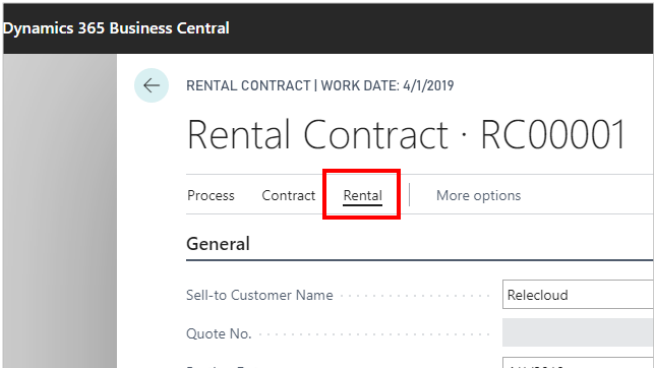
Line Amount Incl. VAT	Currency Code	Amount Including VAT	VAT Prod. Posting Group
2,000.00		2,000.00	GST15

Click on the button **Close**



The screenshot shows a modal window with a 'Close' button highlighted. The modal window is titled 'Close' and contains a 'Close' button.

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract · RC000001

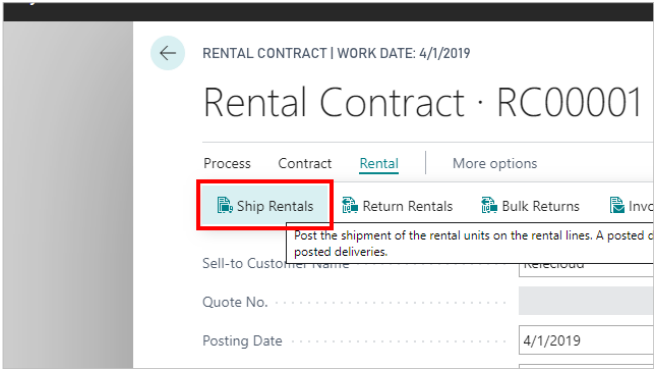
Process Contract **Rental** More options

General

Sell-to Customer Name Relecloud

Quote No.

Click on the navigation menu item **Ship Rentals**



← RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract · RC000001

Process Contract **Rental** More options

Ship Rentals Return Rentals Bulk Returns Invoicing

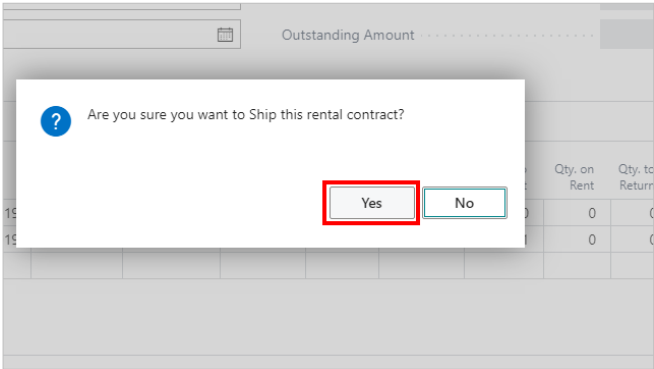
Post the shipment of the rental units on the rental lines. A posted delivery.

Sell-to Customer Name Relecloud

Quote No.

Posting Date 4/1/2019

Click on the button **Yes**



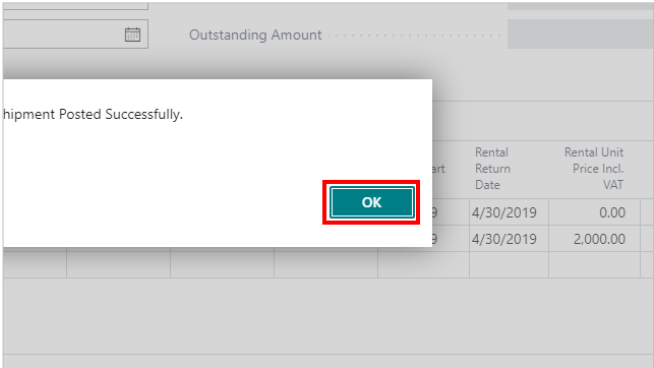
Outstanding Amount

Are you sure you want to Ship this rental contract?

Yes No

	Qty. on Rent	Qty. to Return
15	0	0
15	0	0

Click on the button **OK**



Outstanding Amount

Shipment Posted Successfully.

OK

	Rental Return Date	Rental Unit Price Incl. VAT
9	4/30/2019	0.00
9	4/30/2019	2,000.00



Click on the field **Posting Date**

Rental | More options

Relecloud

4/1/2019

4/1/2019 Type the date in the format M/d/yyyy

4/1/2019

Click on the link **Open the date picker**

External Document No.

Rental Terms Code

Deposit Amount

Contract Total

Outstanding Amount

Click on a date in the calendar

Select the date the invoice is being posted on.

4/1/2019

April 2019

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30

Today Done

Unit	Standard Text Code	Description	Code	Rental Quantity	Location
100		Compactor Group	MONTH-PEND	1	
100-001		Compactor	MONTH-PEND	1	

Click on the navigation menu item popup **Rental**

Dynamics 365 Business Central

← RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract · RC00001

Process Contract **Rental** More options

General

Sell-to Customer Name Relecloud

Quote No.

ODT Rentals Online Help

Click on the navigation menu item **Invoice**

CONTRACT | WORK DATE: 4/1/2019

tal Contract · RC00001

Contract Rental | More options

Rentals Return Rentals Bulk Returns Invoice Invoice and Print Posted

Finalize the document by posting the amounts an

Customer Name Relecloud

te 4/30/2019

Click on the button **Yes**

A screenshot of a software interface showing a confirmation dialog box. The dialog box is white with a blue question mark icon on the left. The text inside the dialog box reads: "Are you sure you want to Invoice this rental contract?". Below the text are two buttons: "Yes" and "No". The "Yes" button is highlighted with a red rectangular border, and the "No" button is highlighted with a blue rectangular border. In the background, a table is visible with columns for "Outstanding Amount", "Rental Return Date", and "Rental Return Date". The table has two rows of data, both showing "4/30/2019".

Click on the navigation menu item popup **Line**

Quote No.

Posting Date 4/30/2019

Order Date 4/1/2019

Document Date 4/30/2019

Rental Lines | Manage **Line** | Functions | Fewer options

Rental Unit No.	Standard Text Code	Description	Rental Code
RU00100		Compactor Group	MONT
→ RU00100-001	:	Compactor	MONT

Click on the navigation menu item **Rental Value Entries**

Date	4/1/2019
Payment Date	4/30/2019

[All Lines](#) |
 [Manage](#) |
 [Line](#) |
 [Functions](#) |
 Fewer options

[Rental Amount Lines](#) |
 [Rental Ledger Entries](#) |
 [Rental Value Entries](#) |
 [Additional Notes](#)

Line	Description	Unit of Measure	Quantity	Unit Price	Total Price	Account	Account Description
U00100						Compactor Group	MONTH-PEND 1
U00100-001	:					Compactor	MONTH-PEND 1

ODT Rentals Online Help

Click on the cell **Amount Including VAT** with the value **2,000.00**

Note that the Rental Value Entry created when invoicing displays the Amount Including VAT.

Quantity	Unit Price	Amount	Amount Including VAT	Currency Code	Entry No.
1	2,000.00	1,739.13	2,000.00		1

Click on the button **Close**

1,739.13	2,000.00	1
Close		

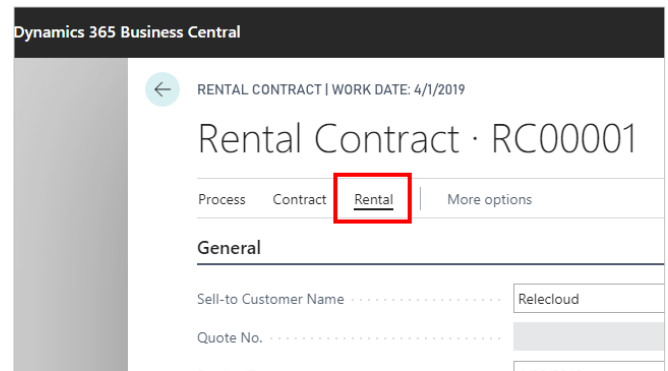
Click on the cell **Qty. to Return** with the value **0**

Currency Code	VAT Prod. Posting Group	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return...	Line Discount %	Ret... Day Billa...	Partial Return De
0	GST15	0	0	0	0	0	<input checked="" type="checkbox"/>	
0	GST15	0	1	0	0	0	<input checked="" type="checkbox"/>	

Enter the text **1**.

Currency Code	VAT Prod. Posting Group	Qty. to Rent	Qty. on Rent	Qty. to Return	Qty. Return...	Line Discount %	Ret... Day Billa...	Partial Return De
0	GST15	0	0	0	0	0	<input checked="" type="checkbox"/>	
0	GST15	0	1	1	0	0	<input checked="" type="checkbox"/>	

Click on the navigation menu item popup **Rental**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract · RC000001

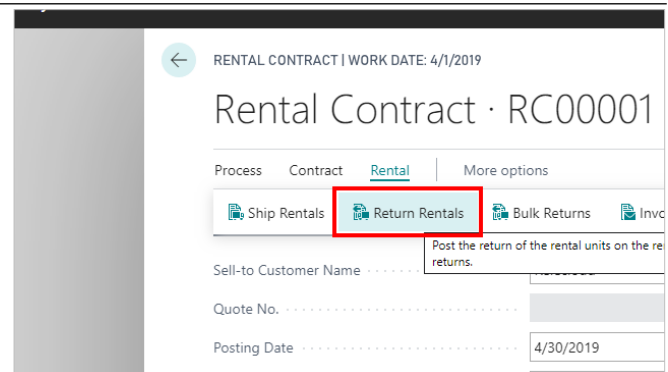
Process Contract **Rental** More options

General

Sell-to Customer Name Relecloud

Quote No.

Click on the navigation menu item **Return Rentals**



Dynamics 365 Business Central

RENTAL CONTRACT | WORK DATE: 4/1/2019

Rental Contract · RC000001

Process Contract Rental More options

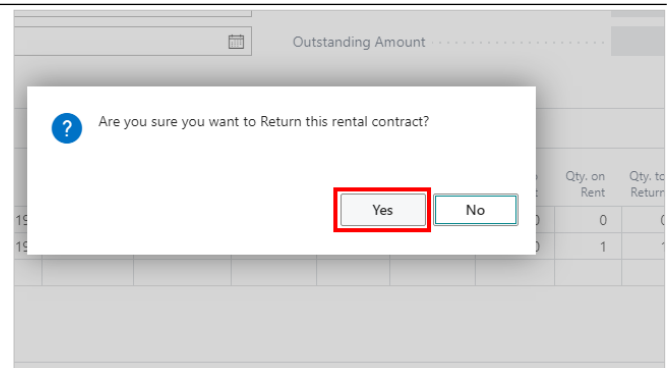
Ship Rentals **Return Rentals** Bulk Returns Invc

Sell-to Customer Name Post the return of the rental units on the re returns.

Quote No.

Posting Date 4/30/2019

Click on the button **Yes**



Outstanding Amount

Are you sure you want to Return this rental contract?

Yes No

Qty. on Rent Qty. to Return

15 0

15 1

On the Sales Lines the amount fields are displayed as including VAT as well.

5. Reviewing Rentals

5.1. Rental Units Review

5.1.1. Rental Unit Status Fields

5.1.1.1. Overview

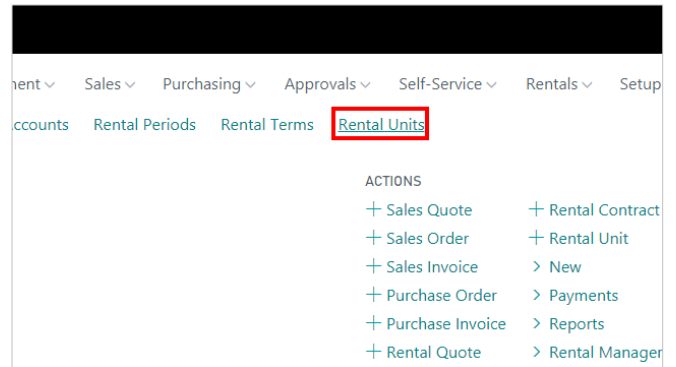
The Rental Unit card has fields that provide a quick way to view the status of a Rental Unit, a Rental Unit Group and the Rental Units linked to a group.

Drill downs are available on the fields, which provide additional information for managing rentals. In addition, should a Rental Unit be on a Contract the contract Document No is provided and can be opened directly from the card.

Profile - Business Manager

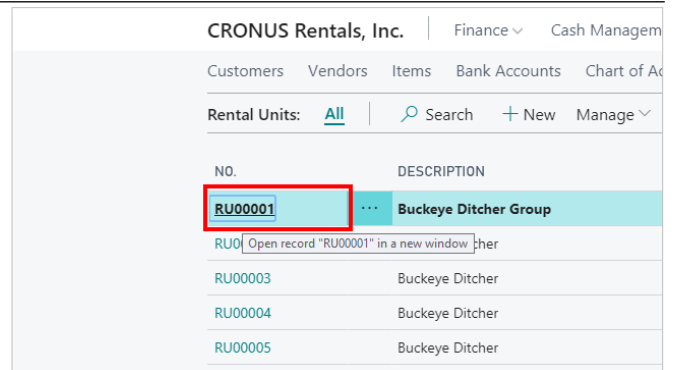
The following steps can be used from the Sales Order Processor Profile.

Click on the navigation menu item **Rental Units**



Click on the link in cell **No.**

Select a rental unit group to open the card.



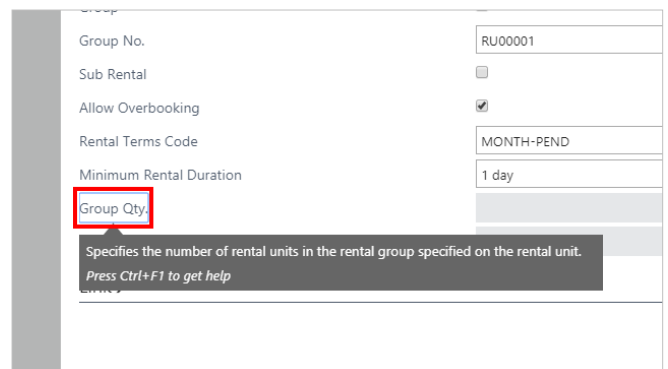
5.1.1.2. Group Qty.

The Group Qty. field displays the number of Rental Units in the rental group specified on the Rental Unit.

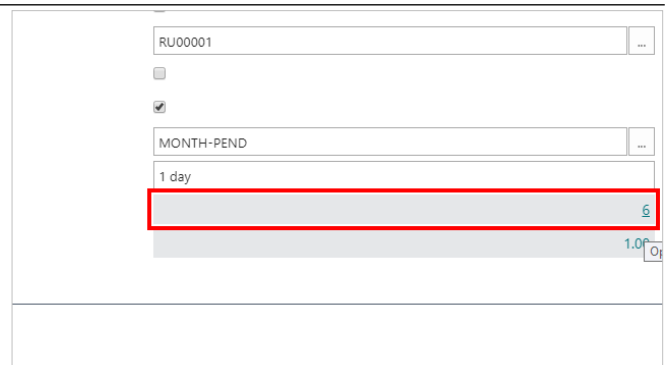
A drill down is provided on the number, which displays a list of the Rental Units linked to the group and shows whether the unit is On Rent or whether a Reservation exists for the unit.

Should the group have units specified as Sub Rental units, they will not be included in the Group Qty. as these are subcontracted products.

Click on the link **Group Qty.**



Click on the number in the field to open the details of Group Qty. number



The listing displayed consists of the Rental Units assigned to the rental group.

Rental Unit List												
<input type="text"/> Search <input type="button" value="+ New"/> <input type="button" value="Edit List"/> <input type="button" value="Delete"/> <input type="button" value="Manage"/> <input type="button" value="Process"/> <input type="button" value="Rental"/> <input type="button" value="Attributes"/> <input type="button" value="Open in Excel"/> <input type="button" value="Actions"/> <input type="button" value="Navigate"/> <input type="button" value="Less options"/>												
NO.	DESCRIPTION	GRO...	GROUP NO.	LOCATION CODE	SERVICE STATUS	ON RENT	RESER... EXIST...	LINK TYPE	LINK CODE	RENTAL CATEGORY CODE	INAC...	SEARCH DESCRIPTION
BD-006	Buckeye Ditcher	<input type="checkbox"/>	RU00001	EAST	No	No					<input type="checkbox"/>	BUCKEYE DITC...
RU00002	Buckeye Ditcher	<input type="checkbox"/>	RU00001	EAST	No	No	Fixed Asset	FA000100			<input type="checkbox"/>	BUCKEYE DITC...
RU00003	Buckeye Ditcher	<input type="checkbox"/>	RU00001	EAST	Yes	Yes					<input type="checkbox"/>	BUCKEYE DITC...
RU00004	Buckeye Ditcher	<input type="checkbox"/>	RU00001	WEST	Yes	Yes					<input type="checkbox"/>	BUCKEYE DITC...
RU00005	Buckeye Ditcher	<input type="checkbox"/>	RU00001	EAST	No	No					<input type="checkbox"/>	BUCKEYE DITC...
RU00006	Buckeye Ditcher	<input type="checkbox"/>	RU00001	EAST	No	No	Fixed Asset	RU00006			<input type="checkbox"/>	BUCKEYE DITC...

5.1.1.3. Group Quote Qty.

The Group Quote Qty. field displays the number of Rental Units in the rental group that are currently entered on Rental Quote(s).

A drill down is provided on the number, which displays a list of the Rental Units in the group that are currently entered on Rental Quotes.

The listing includes the Document No. of the quote, the Customer, the Rental Unit No., the Rental Start Date and Rental Return Date.

Should the group have units specified as Sub Rental units, they will be included in the Group Quote Qty., if any sub rentals are entered on any quotes.

Click on the link **Group Quote Qty.**

☐ Sub Rental
☒ Allow Overbooking
Rental Terms Code
MONTH-PEND
Minimum Rental Duration
1 day
Group Qty.

☐ Sub Rental
☒ Allow Overbooking
Rental Terms Code
MONTH-PEND
Minimum Rental Duration
1 day
Group Qty.

Group Quote Qty.

Specifies the number of rental units in the rental group that are currently entered on rental quote
Press Ctrl+F1 to get help

Click on the number in the field to open the details of Group Quote Qty. number

☐ Sub Rental
☒ Allow Overbooking
Rental Terms Code
MONTH-PEND
Minimum Rental Duration
1 day
Group Qty.

☐ Sub Rental
☒ Allow Overbooking
Rental Terms Code
MONTH-PEND
Minimum Rental Duration
1 day
Group Qty.

6
1.00



The listing displayed consists of the Rental Units in the group which are currently entered on Rental Quotes

VIEW - RENTAL CONTRACT LINE LIST				
DOCUMENT TYPE ▼	DOCUMENT NO.	SELL-TO CUSTOMER NO.	LINE NO.	GROUP NO.
Quote	...	RQ00005	10000	20000 RU00001

5.1.1.4. Group Qty. to Rent

The Group Qty. To Rent field displays the number of Rental Units in the rental group that are currently entered on Rental Contract(s), however, have not been shipped.

A drill down is provided on the number, which displays a list of the Rental Units in the group, which are currently entered on Rental Contracts that have not been shipped/rented out.

The listing also includes the Document No. of the contract, the Customer, the Rental Start Date and Rental Return Date.

Should the group have units specified as Sub Rental unit entered on any contracts, they will be included in the Group Qty. to Rent total and list.

Click on the link **Group Qty. To Rent**

	Inactive
	...
	...
	Group Qty. To Rent
	...
	On Rent
	On Rent Doc. No.
	Deactivation Exit

Specifies the number of rental units in the rental group
Press Ctrl+F1 to get help

Click on the number in the field to open the details of Group Qty. To Rent number.

	2.00
	Open details for "Group Qty. To Rent" "2.00", (Alt+Up) Show tooltip
	0.00
No	
No	

The listing displayed consists of the Rental Units in the group, which are entered on Rental Contracts and are awaiting shipment.

VIEW - RENTAL CONTRACT LINE LIST				
DOCUMENT TYPE ▼	DOCUMENT NO.	SELL-TO CUSTOMER NO.	LINE NO.	GROUP NO.
Order	RC00016	20000	20000	RU00001
Order	RC00017	30000	20000	RU00001

Click on the back button

RENTAL RETURN DATE	LOCATION CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
6/16/2018	WEST	1	0	0
5/26/2018	EAST	1	0	0

5.1.1.5. Group Qty. On Rent

The Group Qty. On Rent field displays the number of Rental Units in the rental group that are currently entered and have been shipped on Rental Contract(s).

A drill down is provided on the number, which displays a list of the Rental Units in the group, which are currently entered on Rental Contracts that have been shipped/rented out.

The listing also includes the Document No. of the contract, the Customer, the Rental Start Date and Rental Return Date.

Should the group have units specified as Sub Rental units on contracts and shipped, they will be included in the Group Qty. on Rent total and list.

Click on the link **Group Qty. On Rent**

Group Qty. To Rent	...
Group Qty. On Rent	...
On Rent Doc. No.	...
Reservations Exist	...



Click on the number in the field to open the details of Group Qty. To Return number

		2.00
		1.00
		1.00
	No	
	No	
		1

The listing displayed consists of the rental units in the group which are currently entered on Rental Contracts, the Qty. To Return has been populated and the posting of the return is pending.

Rental Contract Line List

Search

Open in Excel

DOCUME... TYPE ▼	DOCUMENT NO.	SELL-TO CUSTOMER NO.	LINE NO.	GROUP NO. ▼	RENTAL UNIT NO.	DESCRIPTION	RENTAL QUANTITY	RENTAL START DATE	RENTAL RETURN DATE	LOCATION CODE	QTY. TO RENT	QTY. ON RENT	QTY. TO RETURN
Order	RC00029	10000	20000	RU00001	SUB BUCKEYE	Sub Buckeye Ditcher	1	4/9/2018	5/8/2018	WEST	0	1	1
Order	RC00029	10000	30000	RU00001	RU00004	Buckeye Ditcher	1	4/9/2018	5/8/2018	WEST	0	1	1
Order	RC00029	10000	50000	RU00001	SUB BUCKEYE	Sub Buckeye Ditcher	1	4/9/2018	5/8/2018	EAST	0	1	1
Order	RC00029	10000	60000	RU00001	RU00003	Buckeye Ditcher	1	4/9/2018	5/8/2018	EAST	0	1	1

Click on the back button

Dynamics 365		Business Central	Rental Units > RU00003 - Buckeye Ditcher >	
CR	←	←		
Ren				
NO				
PG				
RU				
BD				
RU				
RU				

Back Rental Contract Line List

Search Open in Excel

DOCUME... TYPE ▼	DOCUMENT NO.	SELL-TO CUSTOMER NO.	LINE NO.	GR
Order	RC00029	10000	20000	RU
Order	RC00029	10000	30000	RU

5.1.1.7. On Rent

The On Rent field displays whether the Rental Unit is rented out. A drill down is provided, which will open the Rental Contract the unit is rented out on.

This field is not applicable to rental unit groups.

Click on the link in cell No.

From the Rental Unit List, ensure the Rental Unit selected shows the On Rent and Reservations Exist as Yes.

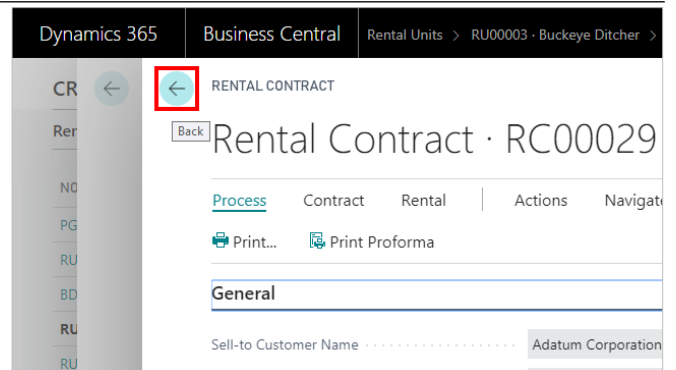
NO.	DESCRIPTION
RU00001	Buckeye Ditcher Group
RU00002	Buckeye Ditcher
RU00003	Buckeye Ditcher
RU00004	Buckeye Ditcher
RU00005	Buckeye Ditcher
RU Open record "RU00005" in a new window tcher	
RU00007	Buckeye Ditcher
RU00050	Cut-Off Gasoline Saw GRP - Hybrid
RU00050-001	Cut-Off Gasoline Saw - Hybrid

Click on the link **On Rent**



Note that the Rental Contract the unit is rented out on opens.

Click on the back button

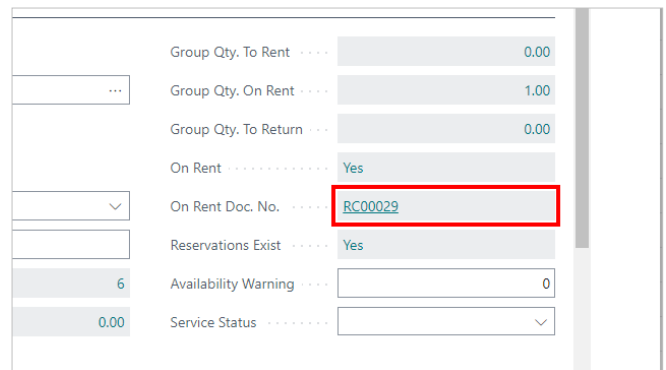


5.1.1.8. On Rent Doc. No.

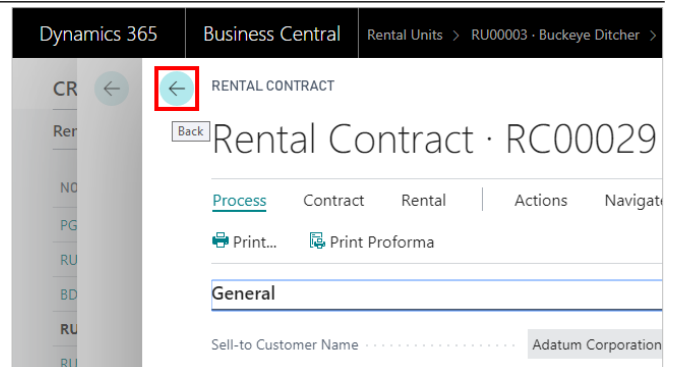
The Rent Doc. No. field displays the Rental Contract No. when the Rental Unit is rented out. A drill down is provided which will open the Rental Contract.

This field is not applicable to rental unit groups.

Click on the field **On Rent Doc. No.**



Click on the back button



5.1.1.9. Reservations Exist

The Reservations Exist field displays whether or not rental reservations exist for the Rental Unit.

A drill down is provided, which will open a listing of the reservation(s) that exist for the Rental Unit. The listing includes the Rental Contract No., the Starting Date-Time of the reservation, Ending Date-Time of the reservation, the Needed Duration, and whether the unit is a Sub Rental unit.

When the Rental Return Date is blank on the Rental Line for a unit, then the Ending Date-Time field will be blank on the Rental Reservation Entry.

This indicates that the unit is on rent indefinitely. Once a Rental Return Date is entered on the Rental Line, then the Reservation Entry, Ending Date-Time field will be updated. This field is not applicable to rental unit groups.

Click on the field **Yes**

Group Qty. To Rent	0.00
Group Qty. On Rent	3.00
Group Qty. To Return	0.00
On Rent	Yes
On Rent Doc. No.	RC00029
Reservations Exist	Yes
Availability Warning	0
Service Status	

The listing displays the reservation entries that currently exist for the rental unit.

The entries will include records for the unit out on rent and pending rentals entered when Allow Overbooking is set to Yes and the unit is on more than one contract.

Rental Reservations													
<div> Search Analyze New Edit List Delete More options </div>													
Type	No.	Group No.	Serial No.	Source Subtype	Source ID	Source Ref. No. 1	Source Ref. No. 2	Quantity	Starting Date-Time	Ending Date-Time	Needed Duration	Location Code	Sub-Rental
Single	81000003	81000001	80-003	Contract	RC00029	40000	60000	1	4/9/2018 12:00 AM	5/8/2018 11:59 PM	29 days 23 hours 59 minutes 59 s...	FAST	No

5.1.2. Rental Unit Statistics with Profitability Analysis

5.1.2.1. Overview

The Rental Unit Statistics provides an overview of historical data, including rental revenues, capital costs, service costs and various metrics.

The Rental Unit Statistics consists of 5 sections.

1. Filtering
2. Capital Costs
3. Revenue
4. Service
5. Metrics

A Cut-Off Date is included on the Rental Unit Statistics, which filters the various amounts and quantities to include only those transactions up to and including the date specified.

The date defaults from the user's Work Date and can be modified by the user to view the amounts based on a different date.

Should a Rental Unit be linked to another master record, then the Link Type and Link Code specified on the Rental Unit Card will be displayed.

When a Rental Unit is linked to an item, then the Capital Costs section is displayed containing the Inventory Cost and the Qty. on Hand.

When a Rental Unit is linked to a Fixed Asset, then two additional sections are displayed.

A Capital Costs section displaying the Acquisition Date, Acquisition Cost, Depreciation Cost, Net Book Value, and the suggested Sales Price entered on the unit or group.

A Service section, which displays the maintenance costs related to the asset.

Should an organization also be using the ODT Service and ODT Service Connector Apps, then the service costs will also be displayed in the Service section.

5.1.2.2. Filtering Section Fields

The following pictures display the filtering section on the Rental Unit Statistics page.

Rental Unit Statistics when the unit is not linked to a master record, such as an Item or Fixed Asset.

General

Cut Off Date

5/11/2020

Suggested Sal...

0.00

Rental Unit Statistics when the unit is linked to a master record, such as an Item or Fixed Asset.

General

Cut Off Date

5/11/2020

Link Code

FA000110

Link Type

Fixed Asset

The following provides a brief description of the fields.

- **Cut Off Date:** This field displays the date on which the amounts displayed in the statistics window are restricted to. The date initially defaults from the users' Work Date can be overridden by the user.
- **Link Type:** The Link Type field is only displayed when the Rental Unit is linked to a master record such as a Fixed Asset or an Item. For example, when a unit is linked to an asset, then Fixed Asset will be displayed in this field.
- **Link Code:** The Link Code field will display the code of the item or asset the Rental Unit is linked on the Rental Unit card.
- **Sales Price:** The Sales Price field is only displayed in the filter section when the Rental Unit is not linked to a master record. The Sales Price will be displayed if a price is specified on the Rental Unit card.

5.1.2.3. Capital Costs Section Fields

The Capital Cost section is only displayed when the Rental Unit is linked to either an Item or a Fixed Asset.

The following picture displays the Capital Cost section when the unit is linked to an Item.

CAPITAL COSTS	
Inventory Cost	200.00
Qty. on Hand	37.00

- **Inventory Cost:** Displays the Unit Cost of the item from the item card. If the item has Specific costing, with SN Purchase Tracking enabled for the item tracking code, then a drill down is available that will show the Item Ledger Entries, which have a Type of Purchase and are still open.
- **Qty. on Hand:** Displays the quantity on hand for the item linked to the Rental Unit. A drill down is available when the quantity is clicked on the opens the Items by Location.

The following picture displays the Capital Cost section when the unit is linked to a Fixed Asset.

CAPITAL COSTS	
Acquisition Date	1/1/2018
Acquisition Cost	525,000.00
Depreciation Cost	-309,601.00
Fixed Asset Net Book Value	215,399.00
Suggested Sale Price	0.00

- **Acquisition Date:** Displays the FA posting date of the first posted acquisition cost.
- **Acquisition Cost:** Displays the sum of the FA Ledger Acquisition entries, as at the Cut-Off Date.
- **Depreciation Cost:** Displays the sum of the depreciation expense posted to the asset as at the Cut-Off Date. When the amount in this field is clicked on, then a listing of the FA Ledger Entries making up the amount will be displayed.
- **Fixed Asset Net Book Value:** Displays the Net Book Value of the asset as of the Cut-Off Date.
- **Suggested Sales Price:** Displays the Sales Price from the Rental Unit card, if entered on the unit.

5.1.2.4. Revenue Section Fields

The following picture displays the Revenue section.

REVENUE	
Rental Revenue	10,000.00
Metered Usage Revenue	0.00
Periodic Usage Revenue	0.00
Standby Revenue	0.00
Total Revenue Earned	10,000.00
Damage Waiver Revenue	1,000.00

- **Rental Revenue:** Displays the rental revenue earned from rental charges based on rental period pricing as at the Cut-Off Date. When the amount in this field is clicked on, then a listing of the Rental Value Entries making up the amount will be displayed.
- **Metered Usage Revenue:** Displays the metered usage revenue, which has been earned as at the Cut-Off Date, when using the metered usage pricing feature in ODT Rentals. When the amount in this field is clicked on, then a listing of the Rental Value Entries making up the amount will be displayed.
- **Periodic Usage Revenue:** Displays the periodic usage revenue, which has been earned as at the Cut-Off Date, when using the periodic usage pricing feature in ODT Rentals. When the amount in this field is clicked on, then a listing of the Rental Value Entries making up the amount will be displayed.
- **Standby Charge Revenue:** Displays the standby charge revenue, which has been earned as at the Cut-Off Date, when using standby charges with the periodic usage pricing feature in ODT Rentals. When the amount in this field is clicked on, then a listing of the Rental Value Entries making up the amount will be displayed.
- **Total Revenue Earned:** Displays the sum of the above revenue amounts.
- **Damage Waiver Revenue:** Displays the damage waiver revenue, which has been earned as at the Cut-Off Date, when billing customers a damage waiver fee.

5.1.2.5. Service Section Fields

The following picture displays the service section from a unit linked to a Fixed Asset.

As the ODT Service and ODT Rental Service Connector Apps are not installed, the related fields are not displayed. However, a brief description of these field is provided.



SERVICE	
Fixed Asset Maintenance Cost	0.00
Rental Revenue net of Service Costs	10,000.00
Rental Revenue net of Service Costs and Dep...	319,601.00

- **Service Ticket Cost:** Displays the total costs from all service costs, including cost on resources and items, which have been posted through the ODT Service module. When the amount in this field is clicked on, then a listing of the Job Ledger Entries making up the amount is displayed when the organization has the ODT Service and Connector App to the ODT Rentals App.
- **Service Cost Invoiced:** Displays the total of the service costs when were invoiced through service, and charged back to rental contracts when the organization has the ODT Service and Connector App to the ODT Rentals App.
- **Total Service Cost:** Displays the sum of the Fixed Asset Maintenance and the Service Costs when the organization has the ODT Service and Connector App to the ODT Rentals App.
- **Rental Revenue net of Service Costs:** Displays the net of Total Revenue Earned minus the Total Service Cost.
- **Rental Revenue net of Service Costs and Depreciation:** Displays the Total Revenue Earned net of service costs and depreciation.

5.1.2.6. Metrics Section Fields

The following picture displays the Metrics section from a Rental Unit linked to a Fixed Asset.

METRICS	
Number of Rentals	2
Average Rental Earned	62,500.00
Average Rental Invoice	41,666.67
Annualized Revenue Earned	4,234.34
Total Days Available	862
Total Days on Rent	751
Time Utilization	0.87
Revenue Utilization	0.54
ROI (%)	82.78
Annualized ROI (%)	35.05

- **Number of Rentals:** Displays the total number of times the Rental Unit has been rented.
- **Average Rental Earned:** Displays the average of rental revenue earned on a rental contract.
- **Average Rental Invoice:** Displays the average of the rental invoices.
- **Annualized Revenue Earned:** Displays the annualized total revenue earned as at the Cut-Off Date specified. The amount is calculated as total revenue divided by the number of days on rent times 365 days, then multiplied by the number of days on rent divided by the total number of days available.
- **Total Days Available:** Displays the total number of days the asset was available for rent, between the Cut-Off Date specified, and the Acquisition Date of an active asset.
- **Total Days on Rent:** Displays the total number of days the Rental Unit was out on rent.
- **Total Days in Service:** Displays the total number of days the Fixed Asset was being service. **NOTE:** This field is only displayed when the organization has the ODT Service and Connector App to the ODT Rentals App.
- **Time Utilization:** Displays the time utilization which is based on the Total Days on Rent divided by the Total Days Available.
- **Revenue Utilization:** Displays the revenue utilization, which is based on total revenue earned divided by dollars possible, which are based on default rental term and price on group or rental unit card.
- **ROI%:** Displays the ROE%, which is based on rental revenue - total rental operating costs)/acquisition cost x 100.
- **Annualized ROI:** Displays a calculated annualized ROI. The calculation is based on the Total Revenue Earned minus Total Maintenance Costs minus Acquisition Costs, divided by the Total Days times 365 days.

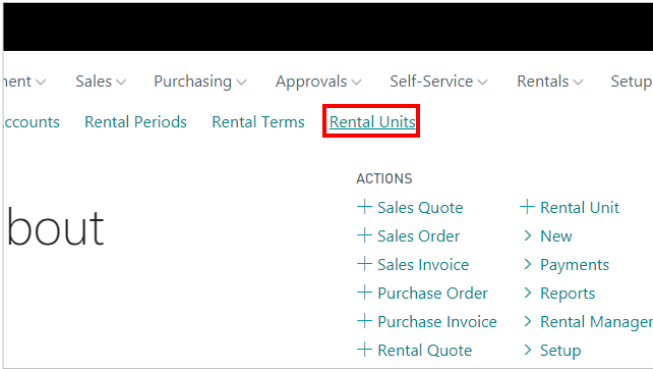


NOTE: The ROI calculations are for Rental Units linked to Fixed Assets only.

5.1.2.7. How to View the Rental Unit Statistics

The following example demonstrates the viewing of a units' statistics.

Click on the navigation menu item **Rental Units**

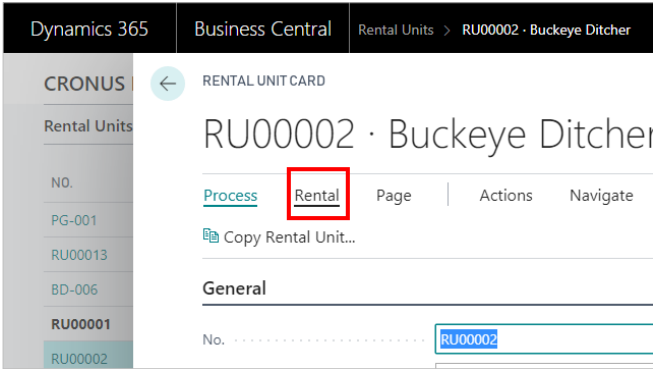


Click on the link in cell **No.** with the value **RU00002**

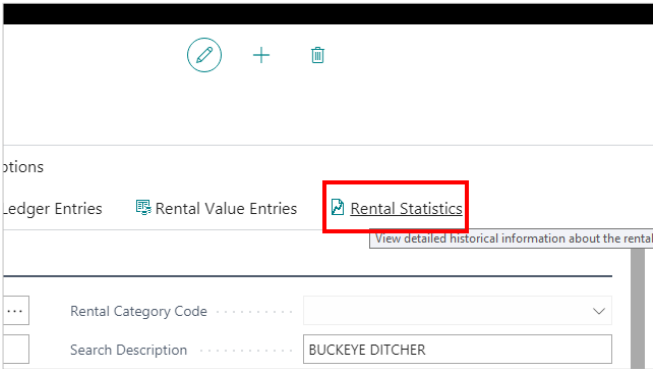
Select the unit that you want to review the statistics on.

NO.	DESCRIPTION	GROUP
PG-001	Portable Generators	
RU00007	165 G Brad Nailer	
BD-006	Buckeye Ditcher	
RU00001	Buckeye Ditcher Group	
RU00002	Buckeye Ditcher	
RU00003	Buckeye Ditcher	
RU00004	Buckeye Ditcher	
RU00005	Buckeye Ditcher	
RU00006	Buckeye Ditcher	

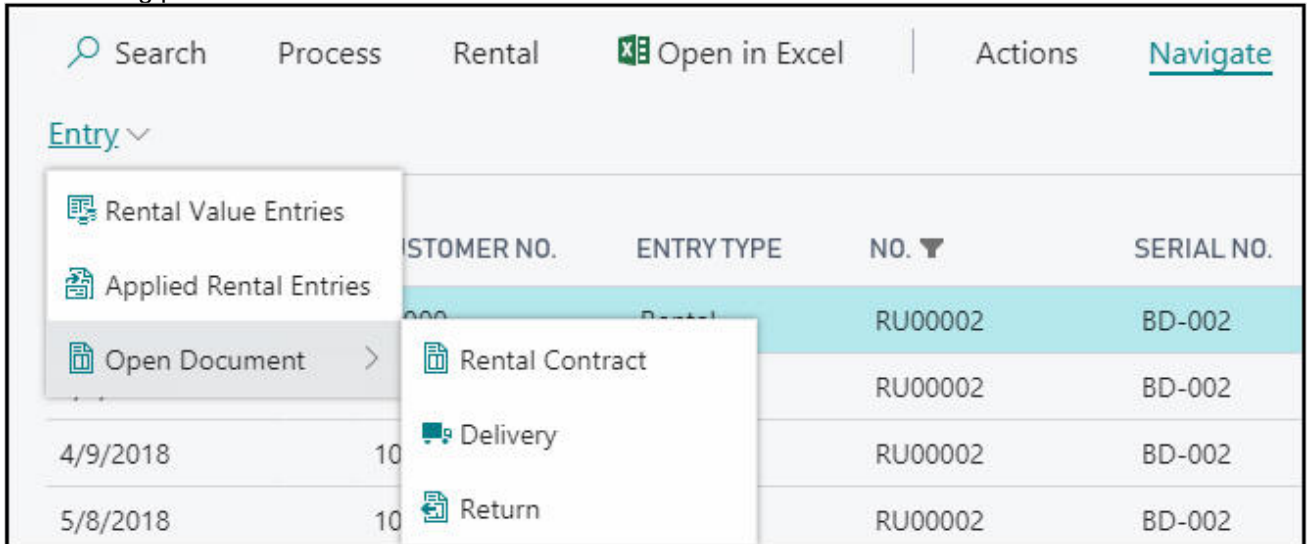
Click on the navigation menu item popup **Rental**



Click on the navigation menu item **Rental Statistics**



the following picture.



CUSTOMER NO.	ENTRY TYPE	NO.	SERIAL NO.
000	Rental	RU00002	BD-002
		RU00002	BD-002
4/9/2018	10	RU00002	BD-002
5/8/2018	10	RU00002	BD-002

- Return Rentals creates a Rental Ledger Entry for each Rental Unit on the Rental Contract that is returned.

When using the Metered Usage pricing feature, there are Metered Usage Entries created.

The following list outlines where the Metered Usage Entries can be accessed from.

- Rental Contract - Rental Line – Line menu - Metered Usage Entries
- Completed Rental Contract – Rental Line - Line menu - Metered Usage Entries
- Rental Quote - Line menu - Metered Usage Entries
- Completed Rental Quote – Rental Line - Line Menu - Metered Usage Entries
- Rental Unit list and card – Rental Menu - Metered Usage Entries

For information on the Metered Usage Entries, see ODT Rentals Online Help, Additional Rental Processes, Metered Usage, Processing Contracts with Metered Usage Overview.

When using the Periodic Usage and Standby Charge pricing feature, a calendar is used for the usage entries. The following list outlines where the Periodic Usage Entries can be accessed from.

- Rental Contract – Rental Line – Functions Menu – Periodic Usage Entries
- Completed Rental Contract – Rental Line - Line Menu – Periodic Usage Entries

For information on the Periodic Usage Calendar, see ODT Rentals Online Help, Additional Rental Processes, Periodic Usage and Standby Charges, Periodic Usage Processing Overview.

5.2.1.2. Accessing Ledger Entries

Ledger Entries can be accessed from the following cards and reports.

- The Rental Unit card has options for Rental Ledger Entries and Rental Value Entries on the command bar - Rental option.
- Rental Contract has the options for Rental Ledger Entries and Rental Value Entries, which are accessed from the Rentals Lines command bar - Lines option. Only those entries related to the individual rental unit line highlighted are displayed.
- Completed Rental Contract List has the options available on the command bar option of Contract, which display entries for all rental lines.

- When the Completed Rental Contract card is opened, then the options for Rental Ledger Entries and Rental Value Entries are accessed from the Rentals Lines command bar option of Lines. Only those entries related to the individual rental unit line highlighted are displayed.
- Rental Registers has options for Rental Ledger Entries and Rental Value Entries on the command bar options of Process and Navigate.
- Posted Rental Deliveries cards have the Rental Ledger Entries available from the Rental Lines command bar option of Lines.
- Posted Rental Returns cards have the Rental Ledger Entries available from the Rental Lines command bar option of Lines.

5.3. Rental Registers

5.3.1. Rental Registers Overview

5.3.1.1. Overview

When the Rental Contract options of Ship Rentals, Invoice, Return Rentals or Undo Shipment are ran a Rental Register is created.

The Rental Registers are similar to standard Dynamics 365 Business Central registers in that it records the entries created.

A Rental Register can include either Rental Ledger Entries, which track unit movement similar to the Item ledger Entries or Rental Value Entries, which record the financial transactions per unit similar to Item Value Entries. The registers will not include both types of entries as the posting function in the rentals are done separately.

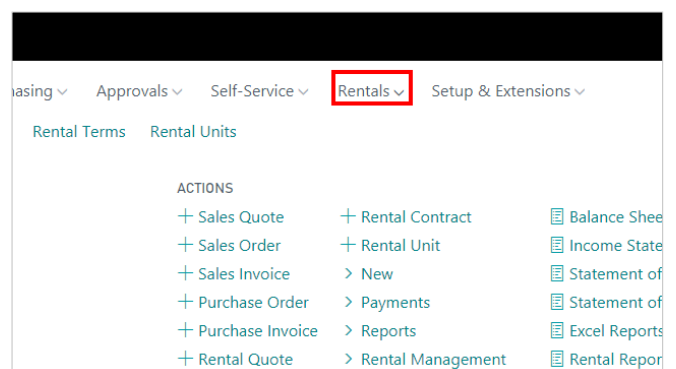
The Home ribbon tab contains options to review the Rental Ledger Entries, or the Rental Value Entries related to the Rental Register you highlight.

The Navigate ribbon tab contains the options to review the Rental Ledger Entries or the Rental Value Entries related to the Rental Register selected.

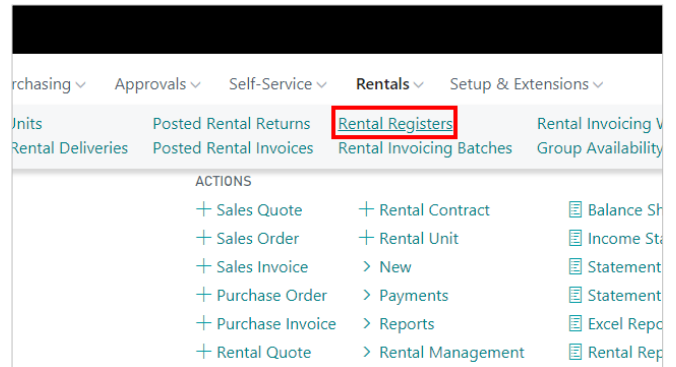
5.3.1.2. Accessing Rental Registers

Accessing the Rental Registers is the same whether using the Business Manager or Sales Order Processor Profiles.

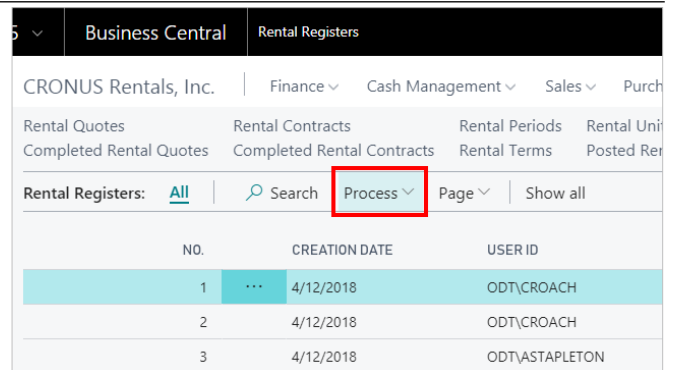
Click on the navigation menu item popup **Rentals**



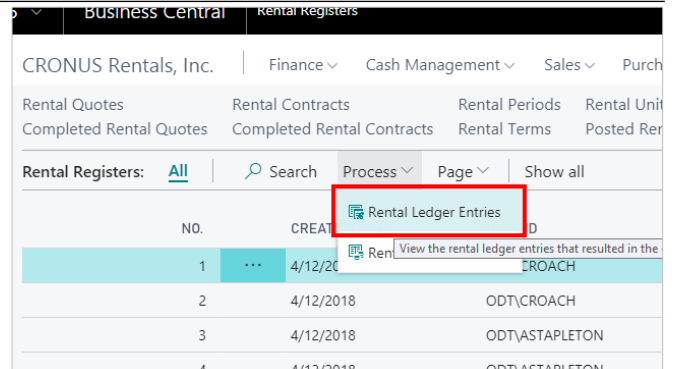
Click on the navigation menu item **Rental Registers**



Click on the navigation menu item popup **Process**



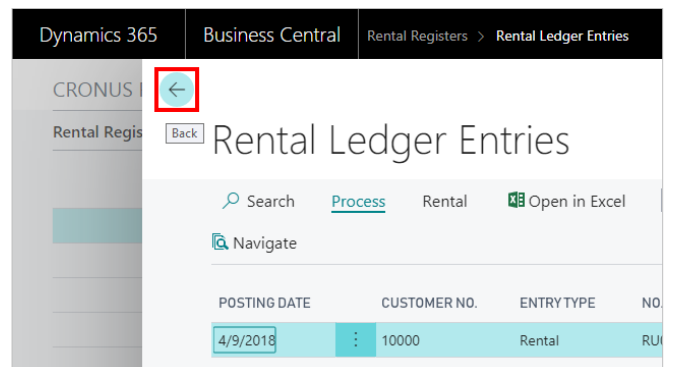
Click on the navigation menu item **Rental Ledger Entries**



For information on the fields shown by default in the Rental Ledger Entries page, point to the caption at the top of the column.

There are additional fields available via the Personalize feature, which if added, you can find information on the field by pointing to the column caption.

Click on the back button



Click on the navigation menu item popup **Process**

Business Central			
Rental Registers			
CRONUS Rentals, Inc.			
Rental Quotes	Rental Contracts	Rental Periods	Rental Units
Completed Rental Quotes	Completed Rental Contracts	Rental Terms	Posted Rentals
Rental Registers: All	Search	Process	Page | Show all
NO.	CREATION DATE	USER ID	
1	4/12/2018	ODT\CROACH	
2	4/12/2018	ODT\CROACH	
3	4/12/2018	ODT\ASTAPLETON	

Click on the navigation menu item **Rental Value Entries**

For information on the fields shown by default in the Rental Value Entries page, point to the column caption.

There are additional fields available via the Personalize feature, which if added, you find information on the field by pointing to the column caption.

Business Central			
Rental Registers			
CRONUS Rentals, Inc.			
Rental Quotes	Rental Contracts	Rental Periods	Rental Units
Completed Rental Quotes	Completed Rental Contracts	Rental Terms	Posted Rentals
Rental Registers: All	Search	Process	Page | Show all
NO.	CREATION DATE	USER ID	
1	4/12/2018	ODT\CROACH	
2	4/12/2018	ODT\CROACH	
3	4/12/2018	ODT\ASTAPLETON	
4	4/12/2018	ODT\ASTAPLETON	
5	4/13/2018	ODT\ASTAPLETON	

Click on the back button

Business Central			
Rental Registers > Rental Value Entries			
CRONUS Rentals, Inc.			
Rental Registers	Back	Rental Value Entries	
Search	Process	Rental	Open in Excel
POSTING DATE	ENTRY TYPE	RENTAL DOC. NO.	NO.
4/9/2018	Rental	RC00003	RU00002
4/9/2018	Rental	RC00003	RU00003

5.4. Rental Reports

5.4.1. Rental Unit Utilization Report

5.4.1.1. Overview

The Rental Unit Utilization report which is used to review the financial amounts per group and unit based on historical rental financial transactions processed.

The report is displayed in a hierarchical manner.

For Rental Groups the display will be by Rental Unit Group and then by Rental Unit No. within the group in alphabetic order. For each Rental Unit in the group the records displayed will be for each completed financial transaction per Rental Contract. There is a total for each group.

Rental Units not linked to a Group will be displayed as if the unit was a group in itself

Included in the report are Posting Date, Rental Document No., Customer No., Customer Name and

the rental amount (\$).

The report can be filtered to display only those unit groups or units based on a specified date range. Filters are optional.

5.4.1.2. Running the Rental Unit Utilization Report

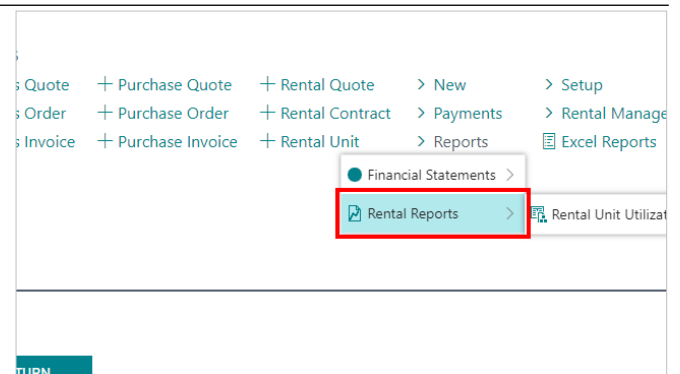
Profile - Business Manager

The report can be ran from the Sales Order Processor profile, however the report is located via the Actions item, Reports, then by selecting Rentals.

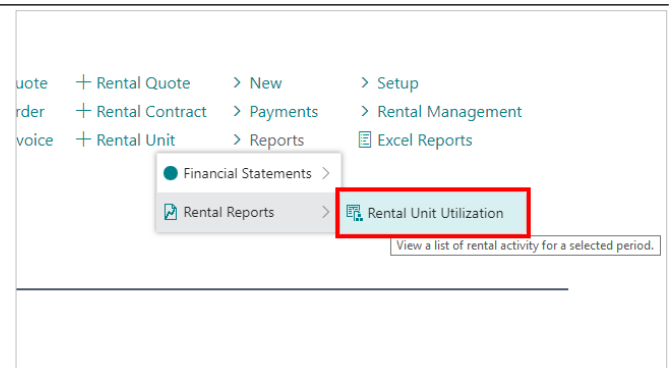
Click on the navigation menu item popup **Reports**



Click on the navigation menu item popup **Rental Reports**



Click on the navigation menu item **Rental Unit Utilization**





The report request page will open

Complete any of the filtering fields provided in the report request page, if desired.

The report request page provides option to Preview, Print or Send the report to various document types, including PDF, Word and Excel.

If selecting Send to, then select the type of document to send the report to.

The following picture provides an example of the Rental Unit Utilization Report.

Rentals - Rental Unit Utilization						10/5/2018 10:44:09 AM
CRONUS USA, Inc.						Page 1
Group No. / Rental Unit No.	Posting Date	Rental Doc. No.	Customer No.	Customer Name	Rental Amount	
PG-001 Portable Generators						
PG-001	Portable Generators					
		5/8/2018 RC00014	10000	Adatum Corporation	1,000.00	
PG-001 Group Total:					1,000.00	
RU00001 Buckeye Ditcher Group						
RU00002	Buckeye Ditcher			Serial No.: BD-002		
		4/9/2018 RC00003	10000	Adatum Corporation	500.00	
		5/8/2018 RC00004	10000	Adatum Corporation	500.00	
		4/9/2018 RC00005	10000	Adatum Corporation	950.00	
		5/8/2018 RC00006	10000	Adatum Corporation	1,100.00	
		5/17/2018 RC00008	10000	Adatum Corporation	700.00	
		5/15/2018 RC00009	10000	Adatum Corporation	612.90	
		5/5/2018 RC00015	10000	Adatum Corporation	10,000.00	
RU00003	Buckeye Ditcher			Serial No.: BD-003		
		4/9/2018 RC00003	10000	Adatum Corporation	500.00	
		5/8/2018 RC00004	10000	Adatum Corporation	500.00	
		4/9/2018 RC00005	10000	Adatum Corporation	950.00	
		5/8/2018 RC00006	10000	Adatum Corporation	1,100.00	
		5/17/2018 RC00008	10000	Adatum Corporation	700.00	
		5/15/2018 RC00009	10000	Adatum Corporation	612.90	
		5/5/2018 RC00015	10000	Adatum Corporation	10,000.00	
RU00004	Buckeye Ditcher			Serial No.: BD-004		
		5/8/2018 RC00016	10000	Adatum Corporation	.00	
RU00001 Group Total:					28,725.80	
RU00007 Out-Off Gasoline Saw GRP - Hybrid						
RU00008	Out-Off Gasoline Saw - Hybrid			Serial No.: QOS-008		
		4/9/2018 RC00010	10000	Adatum Corporation	80.00	
RU00009	Out-Off Gasoline Saw - Hybrid			Serial No.: QOS-009		
		4/9/2018 RC00010	10000	Adatum Corporation	80.00	
RU00007 Group Total:					160.00	
Rental Unit Utilization Report Total:					29,885.80	

5.4.2. ODT Rental Unit Sales Report

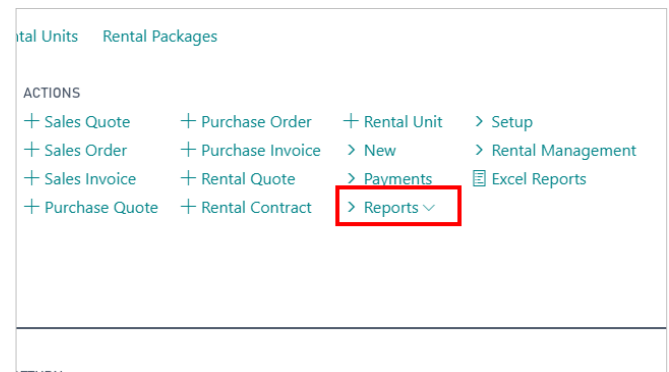
5.4.2.1. Overview

The ODT Rental Unit Sales report provides the ability to filter by category and rental unit group. The report details provide the sum of rental revenue by rental contract, customer number and the number of days rented. The report groups the records based on the filters set and provides a report total.

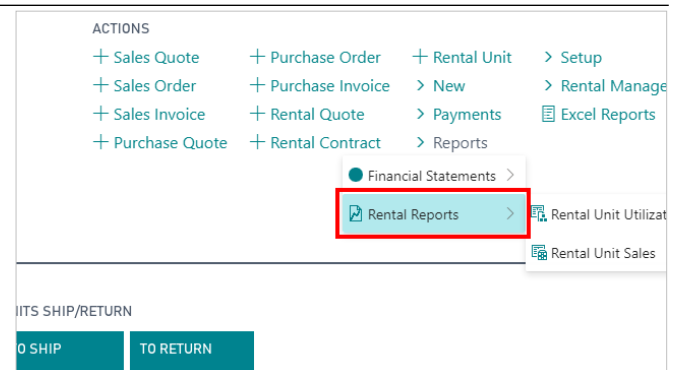
5.4.2.2. How to Run the Rental Unit Sales Report

The following demonstrates the accessing and running of the ODT Rental Sales Report.

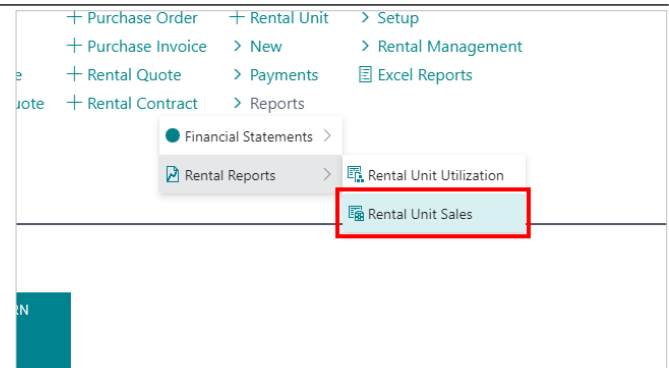
Click on the navigation menu item popup **Reports**



Click on the navigation menu item popup **Rental Reports**



Click on the navigation menu item **Rental Unit Sales**



The ODT Rental Sales Report can also be located using the standard Search feature.

The following picture displays the report request page for specifying filtering options for the report.

ODT RENTAL UNIT SALES

Print Settings

Selected printer: (Browser)

Filter: Rental Unit

× No.

× Group

× Group No.

× Rental Category Code

+ Filter...

Filter totals by:

× Date Filter

+ Filter...

Send to...

Print

Preview

Cancel

On the request page are a variety of filtering options:

• No.:

A specific unit can be selected so that only the rental revenue related to that unit is included in the report.

• Group:

The Group option provides the options of Yes and No, to specify if only groups are to be included in the report. When left blank, then all rental units and all groups will be included in the report.

When Yes is selected, then the report will not include any rental units which are not assigned to groups.

When No is selected, then only rental units which are not assigned to a group will be included in the report.

• Group No.:

A specific group can be selected so that only the rental revenue related to that group is included in the report.

• Rental Category Code:

A specific category code can be selected so that only those rental units and groups are included in the report.



Other filters set will apply in addition to this filter. For example, if the Group filter is set to Yes, then only the Groups and assigned units with the specified Category Code will be included in the report.

The following picture displays the report when there have been no filters set.

Rentals - Rental Unit Sales			3/3/2021 11:17:26 AM -07:00		
CRONUS Rentals, Inc.			Page 1		
Posting Date	Rental Doc. No.	Customer No.	Customer Name	# of Days Rented	Rental Amount
PG-001 Portable Generators					
PG-001 Portable Generators					
5/11/2020	RC00002	10000	Adatum Corporation	30	500.00
5/5/2020	RC00005	10000	Adatum Corporation	61	2,000.00
6/5/2020	RC00012	10000	Adatum Corporation	61	2,000.00
4/6/2020	RC00013	10000	Adatum Corporation	61	3,000.00
PG-001 Group Total:				213	7,500.00
RU00007 16 G Brad Nailer					
RU00007	16 G Brad Nailer	Serial No.: 5N-001			
4/19/2020	RC00007	10000	Adatum Corporation	53	1,165.00
RU00007 Group Total:				53	1,165.00
RU00008 18 G Brad Nailers Group					
RU00008-001	18 G Brad Nailer	Serial No.: 18BN-001			
5/5/2020	RC00005	10000	Adatum Corporation	61	300.00
RU00008 Group Total:				61	300.00
RU00009 16 G Brad Nailers Group					
RU00009-001	16 G Brad Nailer	Serial No.: 16BN-001			
4/6/2020	RC00013	10000	Adatum Corporation	61	300.00
RU00009-004	16 G Brad Nailer	Serial No.: 16BN-004			
4/6/2020	RC00014	10000	Adatum Corporation	61	300.00
RU00009 Group Total:				122	600.00
RU00024 Wacker 5023 Excavator Group					
RU00024-001	Wacker 5023	Serial No.: 5023-001			
4/12/2020	RC00001	10000	Adatum Corporation	13	1,900.00
5/5/2020	RC00006	10000	Adatum Corporation	118	16,300.00
RU00024 Group Total:				131	18,200.00
				580	27,765.00
DITCHERS Ditchers					
RU00001 Buckeye Ditcher Group					
RU00002	Buckeye Ditcher	Serial No.: 5D-002			
4/10/2020	RC00003	10000	Adatum Corporation	10	1,650.00
6/5/2020	RC00012	10000	Adatum Corporation	122	11,000.00
RU00003	Buckeye Ditcher	Serial No.: 5D-003			
8/2/2018	RC00009	10000	Adatum Corporation	31	5,500.00
3/10/2019	RC00010	10000	Adatum Corporation	1440	132,000.00
RU00004	Buckeye Ditcher	Serial No.: 5D-004			
8/2/2018	RC00009	10000	Adatum Corporation	31	5,500.00
3/10/2019	RC00010	10000	Adatum Corporation	1440	132,000.00
RU00001 Group Total:				3074	287,650.00
DITCHERS Category Total:				3074	287,650.00
Rental Unit Sales Report Total:				3654	315,415.00

The following picture displays the report with a Rental Category Code filter of DITCHERS specified.

Rentals - Rental Unit Sales					3/3/2021 11:20:19 AM -07:00
CRONUS Rentals, Inc.					Page 1
Rental Unit Rental Category Code: DITCHERS					
Posting Date	Rental Doc. No.	Customer No.	Customer Name	# of Days Rented	Rental Amount
DITCHERS Ditchers					
RU00001 Buckeye Ditcher Group					
RU00002	Buckeye Ditcher	Serial No.: BD-002			
4/10/2020 RC00003		10000	Adatum Corporation	10	1,650.00
6/5/2020 RC00012		10000	Adatum Corporation	122	11,000.00
RU00003 Buckeye Ditcher Serial No.: BD-003					
8/2/2018 RC00009		10000	Adatum Corporation	31	5,500.00
3/10/2019 RC00010		10000	Adatum Corporation	1440	132,000.00
RU00004 Buckeye Ditcher Serial No.: BD-004					
8/2/2018 RC00009		10000	Adatum Corporation	31	5,500.00
3/10/2019 RC00010		10000	Adatum Corporation	1440	132,000.00
RU00001 Group Total:				3074	287,650.00
DITCHERS Category Total:				3074	287,650.00
Rental Unit Sales Report Total:				3074	287,650.00

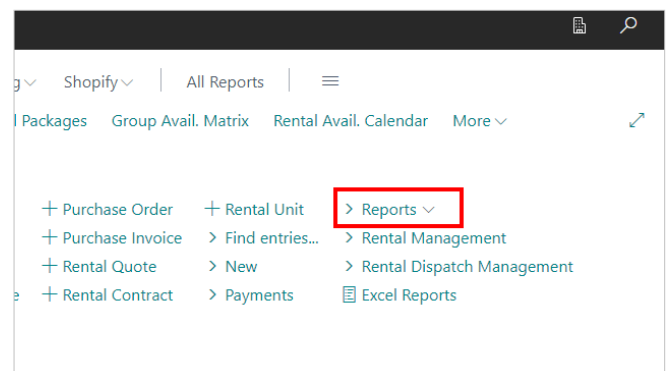
5.4.3. Outstanding Contract Amount Report

The Outstanding Contract Amount report provides the ability to understand what needs to be re-signed/renewed and also give us an idea of the invoicing backlog that is secured for the future.

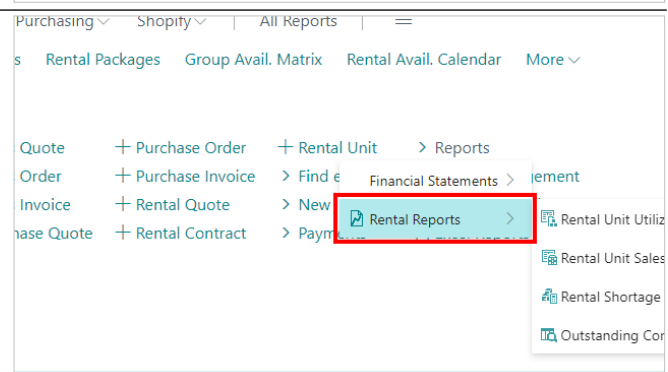
The report contains the total value of the contract excluding taxes, the amount billed on the contract excluding taxes, and the remaining amount on the contract excluding taxes.

When contract has a blank Rental Return Date, the report uses +1 periods (past what has already been invoiced) the same way the "Rental Contract Report" does for rental contracts with blank return dates.

Click on the navigation menu item popup **Reports**



Click on the navigation menu item popup **Rental Reports**





Click on the navigation menu item **Outstanding Contract Amount**

Outstanding Contract Amount Request Page

Various filter options are provided to filter what the report will contain and additional field filters can be added if needed.

Outstanding Contract Amount Report Example

OUTSTANDING CONTRACT AMOUNT REPORT							
CRONUS Rentals Inc.				Friday, March 22, 2024 3:26 PM			
				Page 1			
				ODT-ASTAPLETON			
Rental Contract No.	Customer No.	Customer Name	External Doc. No.	Job No.	Contract Total	Billed Amount	Remaining Amount
RC00008	50000	Relecloud	ATLANTA JAZZ FESTIVAL		1,468.00	0.00	1,468.00
RC00009	20000	Trey Research	ATLANTA JAZZ FESTIVAL		1,405.35	0.00	1,405.35
RC00011	10000	Adatum Corporation	MULTI RC TRIP		500.00	0.00	500.00
RC00013	20000	Trey Research	PLAN LOAD & TRIP FROM CONTRACT		5,882.00	0.00	5,882.00
RC00014	10000	Adatum Corporation	JOB MULTI-CUST	300060	1,015.00	0.00	1,015.00
RC00015	50000	Relecloud	JOB MULTI-CUST	300060	515.00	0.00	515.00
RC00017	20000	Trey Research	MULTI RC TRIP		1,081.95	0.00	1,081.95
RC00019	20000	Trey Research			660.00	660.00	0.00
Report Totals					12,527.30	660.00	11,867.30

5.5. Completed and Posted Rental Documents

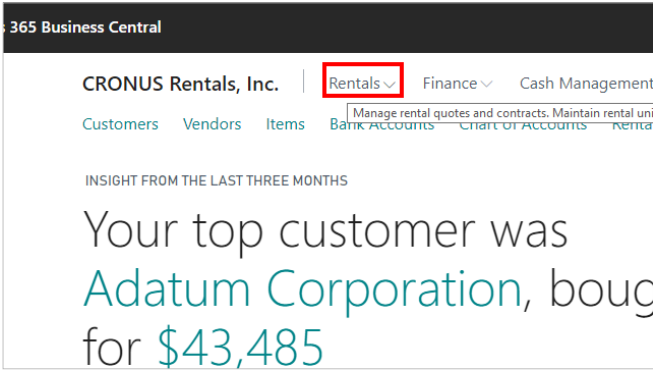
5.5.1. Completed and Posted Rental Documents

5.5.1.1. Accessing Completed and Posted Rental Documents from

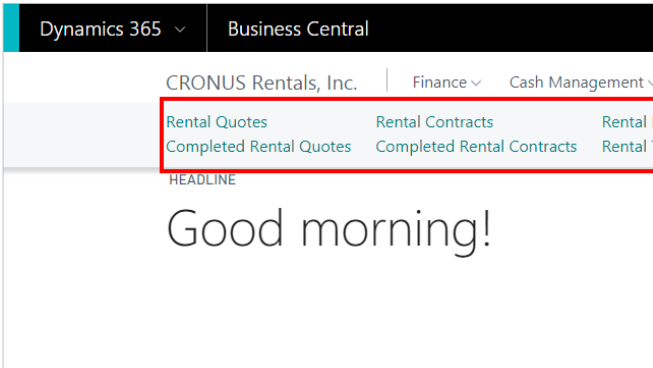


the Business Manager Role Center

Click on the navigation menu item popup **Rentals**



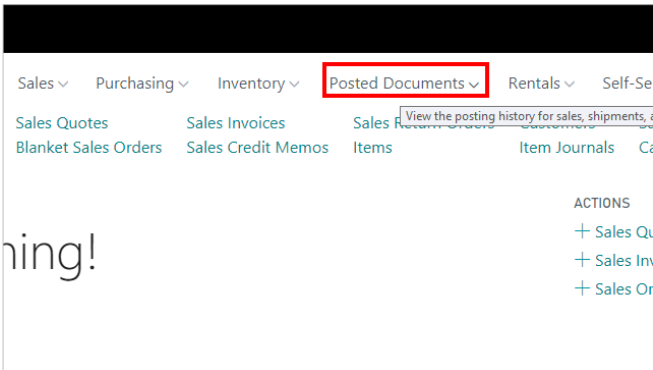
The posted rental documents in the Rentals menu button include the Completed Rental Quotes, Completed Rental Contracts, Posted Rental Deliveries, Posted Rental Returns, Posted Rental Invoices and Posted Sales Invoices.



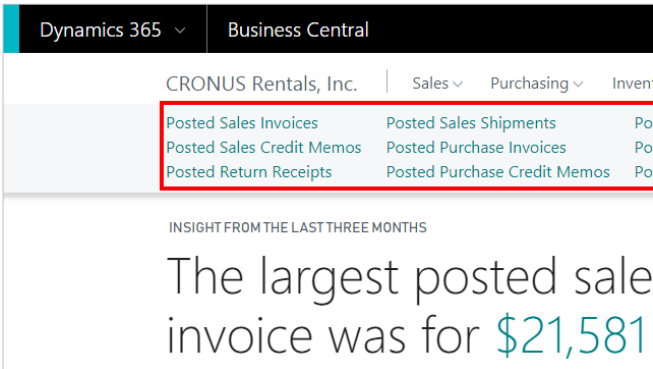
Optionally the Search feature can be used to locate and open the various posted rental documents.

5.5.1.2. Accessing Completed and Posted Rental Documents from the Sales Order Processor Role Center

Click on the navigation menu item popup **Posted Documents**



The posted rental documents in the Posted Documents Activity button include the Completed Rental Quotes, Completed Rental Contracts, Posted Rental Deliveries, Posted Rental Returns, Posted Rental Invoices and Posted Sales Invoices.



Optionally the Search feature can be used to locate and open the various posted rental documents.



5.5.1.3. Completed Rental Quotes

Upon selection of Completed Rental Quotes, a listing of rental quotes is provided. This listing includes those Rental Quotes that were converted to Rental Contracts.

Should your organization utilize the Mark as Complete on Rental Quotes on those quotes where the customer(s) decline to move forward with the rental, these quotes will be included in the listing as well. Thus, providing a full audit trail of all Rental Quotes.

The Completed Rental Quote contains both Rental Lines and Sales Lines as entered on a Rental Quote prior to either converting the quote to a Rental Contract or selecting to mark the quote as complete.

Rental Amount lines are accessible by selecting the ribbon Rental Lines – Lines. For information on the rental fields, please review the “Rental Quote Overview” documentation located in the Rental Quotes help.

The Completed Rental Quote provides the function to re-open the quote, which is primarily for those quotes declined by a Customer and were marked as complete. Thus, saving time of creating a new quote should the customer change their mind and decide to rent from your organization.

The re-opened quote can be modified as needed. For information on this process, see the ODT Rentals Online Help, Processing Rentals, Rental Quotes - How to Mark a Rental Quote as Complete and Re-Open the Quote.

5.5.1.4. Completed Rental Contracts

The Completed Rental Contracts provides a historical listing of all completed contracts and provide an easy way in which to access and review all related entries and documents.

From both the listing and the Completed Rental Contract card the Rental Ledger Entries, Rental Value Entries, Posted Deliveries, Posted Returns and Posted Invoices related to the contract can be viewed.

The contract card contains both Rental Lines and Sales Lines as entered on a Rental Contract at the time at which the rental units were returned.

For information on the rental fields, please review the “Rental Contract Overview” documentation located in the Rental Contracts help.

5.5.1.5. Posted Rental Deliveries

Upon selection of Posted Rental Deliveries a listing of all posted shipments is provided. The Posted Rental Delivery document is created when Ship Rentals is selected from a Rental Contract.

From the Posted Rental Delivery listing and card, the document can be printed, emailed, sent, or navigated on.

The Process and Actions command bar contains the Navigate option, which will provide links to the Rental Contract, whether open or completed.

The Posted Rental Delivery card has a Rental Lines fast tab which contains the Rental Units which were shipped.

Information on the fields on the General, Invoicing and Shipping fast tabs can be view by clicking on the field caption.

For information on the fields on the Rental Lines, point the mouse to the column caption.

5.5.1.6. Posted Rental Returns

Upon selection of Posted Rental Returns a listing of all posted returns is provided. The Posted Rental Return document is created when Return Rentals is selected from a Rental Contract.

From the Posted Rental Return listing and card, the document can be printed, emailed, sent, or navigated on.



The command bar options of Process and Actions has the Navigate option. This option will provide links to the Rental Contract, whether open or completed, that the return was processed from and to the Rental Ledger Entries that were posted when the return was posted.

The Posted Rental Return card has a Rental Lines fast tab which contains the Rental Units which were returned. Information on the fields on the General, Invoicing and Shipping fast tabs can be view by clicking on the field caption.

For information on the fields on the Rental Lines, point the mouse to the column caption.

5.5.1.7. Posted Rental Invoices

This option is only available to the Business Manager Profile.

Users with the Sales Order Processor Profile will access the Posted Sales Invoices from the Posted Documents command bar option.

Upon selection of Posted Rental Invoices a listing of all posted rental invoices is provided. The Posted Rental Invoice is created when Invoice is selected from a Rental Contract.

The Rental Invoice can be re-printed to PDF which will print the Rental Charges and Sales Charges, emailed, or sent, and can be navigated on.

The command bar option of Actions contains the Navigate options which will provide links to the Posted Sales Invoice and the posted G/L Entries, Tax, Customer Ledger Entry and Detailed Customer Ledger Entry.

The Posted Rental Invoice card Lines fast tab contains the G/L Accounts the rental revenue was posted to. Information on the fields on the General, Invoice Details and Shipping and Billing fast tabs can be view by clicking on the field caption.

For information on the fields on the Lines, point the mouse to the column caption.

5.6. Customer Rental History

5.6.1. How to View Customer Rental History

5.6.1.1. Overview

ODT Rentals provides the ability to view a Customer's Rental History from the Customer Card.

The page provides the user with an option to set the View by, which contains the options of Day, Week, Month, Quarter, Year and Period. A user can as well set the View as option to either Net Change, or Balance at Date.

The Lines in the page display the Period Start, Period Name, Rentals Balance Due (\$) and Rental (\$) based on the View by and View as settings selected.

From of the Rentals Balance Due (\$) amounts, when an amount is clicked on, a page opens showing the details of Customer Ledger Entries that were created from rental transactions. The Rental Balance Due (\$) amount displayed is the sum of the Amount field based on the Due Date on the Customer Ledger Entries.

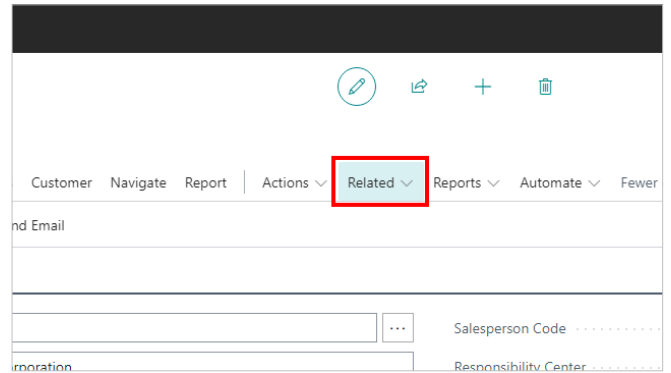
From the Rental (\$), when an amount is clicked on, a page opens showing the details of Customer Ledger Entries that were created from rental transactions. The Rental (\$) amount displayed is the sum of the Amount field based on the Posting Date on the Customer Ledger Entries.

Rental cues have been added to the Sell-to Customer Sales History and the Customer Sales History fact boxes which provides an easy and quick way to review the completed and open rental documents.

5.6.1.2.

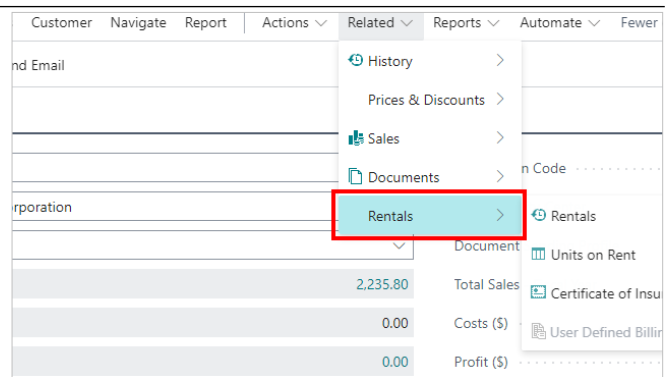
How to View Customer Rental History

Click on the navigation menu item popup **Related**



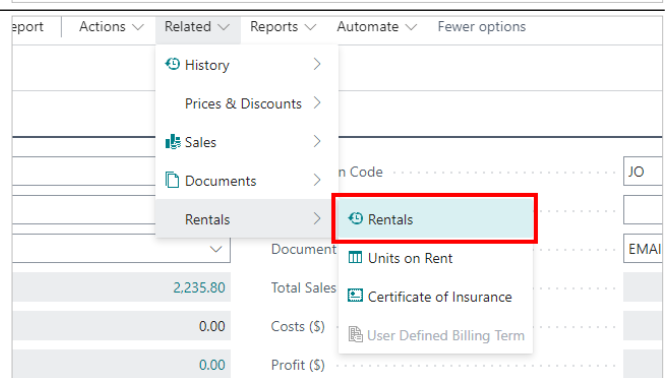
The screenshot shows the top navigation bar of the ODT Rentals Online Help interface. The 'Related' menu item is highlighted with a red box. The navigation bar includes links for Customer, Navigate, Report, Actions, Related, Reports, Automate, and Fewer. Below the navigation bar, there are input fields for 'nd Email', 'Salesperson Code', and 'Responsibility Center'.

Click on the navigation menu item popup **Rentals**



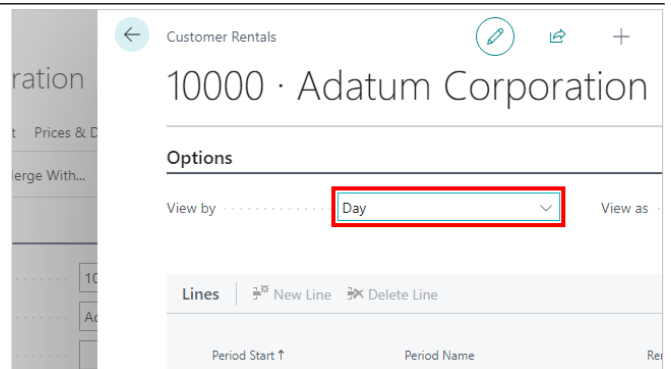
The screenshot shows the 'Related' menu dropdown. The 'Rentals' option is highlighted with a red box. The dropdown menu includes options for History, Prices & Discounts, Sales, Documents, Rentals, Units on Rent, Certificate of Insurance, and User Defined Billing. Below the dropdown, there is a table with columns for 'Total Sales', 'Costs (\$)', and 'Profit (\$)'.

Click on the navigation menu item **Rentals**



The screenshot shows the 'Related' menu dropdown. The 'Rentals' option is highlighted with a red box. The dropdown menu includes options for History, Prices & Discounts, Sales, Documents, Rentals, Units on Rent, Certificate of Insurance, and User Defined Billing. Below the dropdown, there is a table with columns for 'Total Sales', 'Costs (\$)', and 'Profit (\$)'.

Click on the field **View by**



The screenshot shows the 'Customer Rentals' section. The 'View by' field is highlighted with a red box. The field is set to 'Day'. Below the field, there is a table with columns for 'Period Start', 'Period Name', and 'Revenue'.



ODT Rentals Online Help

Click on the item **Period** in the list

Select the option of how you wish to see the rental history.

Click on the field **View as**

Choose whether you wish to view the rental history amounts as Net Change or Balance at Date, for the period selected in the View by option.

Click on the item **Balance at Date** in the list

Click on the link in cell **Rental Balance Due (\$)** with the value **1,011.80**

When the amount displayed is clicked on a page will open displaying the Customer Ledger Entries that make up the amount.

Period Name	Rental Balance Due (\$)
January	0.00
February	0.00
March	0.00
April	0.00
May	0.00
June	1,011.80
July	0.00
August	0.00
September	0.00
October	0.00
November	0.00

Click on the cell **Rental (\$)** with the value **1,011.80**

When the amount displayed is clicked on a page will open displaying the Customer Ledger Entries that make up the amount.

me	Rental Balance Due (\$)	Rental (\$)
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	1,011.80
	1,011.80	0.00
	0.00	0.00
	0.00	0.00
per	0.00	0.00
	0.00	0.00

5.6.1.3. Rental Cues in Customer Fact Boxes

Sell-to Customer Sales History Fact Box

On the Sell-to Customer Sales History Fact Box the following rental cues are displayed.

- **Ongoing Rental Contracts**, which displays the number of open contracts related to the Sell-to Customer, and when selected opens a listing of the open contracts from which the contract can be opened.
- **Ongoing Rental Quotes**, which displays the number of open rental quotes elated to the Sell-to Customer, and when selected opens a listing of the open rental quotes from which the quote can be opened.
- **Completed Rental Contracts**, which displays the number of completed contracts related to the Sell-to Customer, and when selected opens a listing of the completed contracts.
- **Completed Rental Quotes**, which displays the number of completed quotes related to the Sell-to Customer, and when selected opens a listing of the completed rental quotes.
- **Ongoing Rental Contract Lines**, which displays the number of open rental contract lines related to the Sell-to Customer, and when selected opens a listing of the contract rental lines.

Customer Sales History Fact Box

On the Sell-to Customer Sales History Fact Box the following rental cues are displayed.

- **Bill-To Ongoing Rental Contracts**, which displays the number of open contracts related to the Bill-to Customer, and when selected opens a listing of the open contracts from which the contract can be opened.
- **Bill-To Ongoing Rental Quotes**, which displays the number of open rental quotes elated to the Bill-to Customer, and when selected opens a listing of the open rental quotes from which the quote can be opened.
- **Bill-to Completed Rental Contracts**, which displays the number of completed contracts related to the Bill-to Customer, and when selected opens a listing of the completed contracts.
- **Bill-To Completed Rental Quotes**, which displays the number of completed quotes related to the Bill-to Customer, and when selected opens a listing of the completed rental quotes.
- **Bill-To Ongoing Rental Contract Lines**, which displays the number of open rental contract lines related to the Bill-to Customer, and when selected opens a listing of the contract rental lines.

5.6.2. How to View the Rental Units on Rent to the Customer

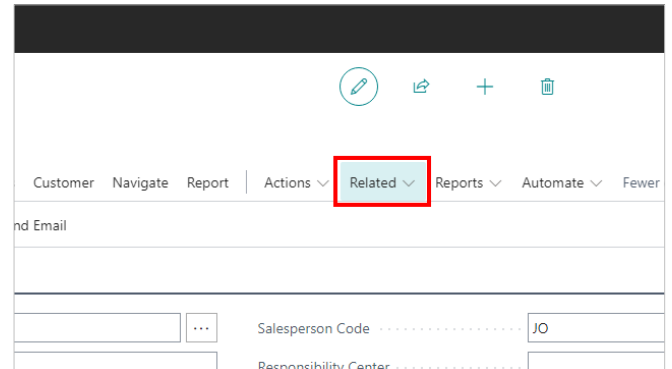
5.6.2.1. Overview

A list of, Units on Rent, has been added to the Customer card, which displays a listing of Rental Units that are still out on rent to the Customer.

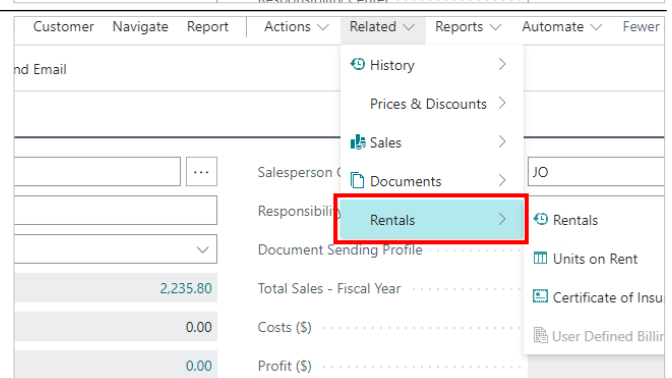
5.6.2.2.

How to View the Rental Units on Rent to the Customer

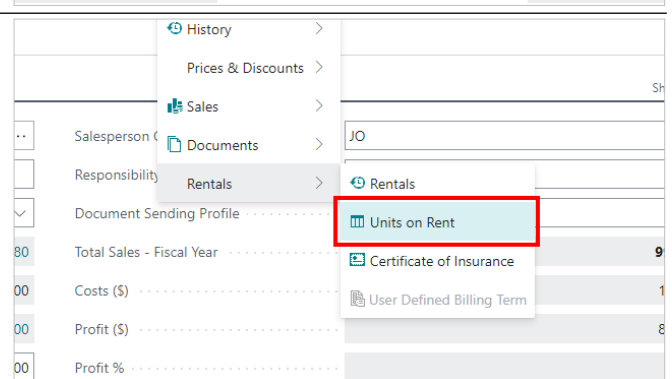
Click on the navigation menu item popup **Related**



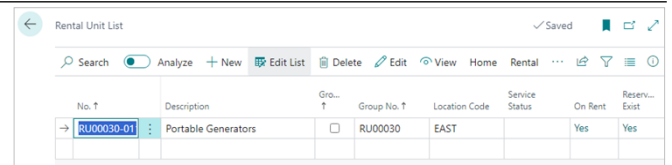
Click on the navigation menu item popup **Rentals**



Click on the navigation menu item **Units on Rent**



Unit on Rent List



No. ↑	Description	Group No. ↑	Location Code	Service Status	On Rent	Reserv... Exist
RU00030-01	Portable Generators	RU00030	EAST		Yes	Yes

6. Support and ODT Rental Help Information

6.1. ODT Support and Rental Help Information

6.1.1. Support and ODT Rentals Online Help

6.1.1.1. Help Portal Address

Visit the
<https://support.opendoorerp.com/solution/categories/17000078870> support site. From the site you can engage our support services.

6.1.1.2.

How to Access ODT Rental Online Help in Dynamics 365



Business Central

The following steps demonstrate how to access the ODT Rentals Online Help and demonstrates some of the features of the help portal.

Click on the navigation menu item popup **Rental Management**

ACTIONS

+ Sales Quote	+ Rental Contract	Balance Sheet
+ Sales Order	+ Rental Unit	Income State
+ Sales Invoice	> New	Statement of
+ Purchase Order	> Payments	Statement of
+ Purchase Invoice	> Reports	Excel Reports
+ Rental Quote	> Rental Management	Rental Report

Click on the navigation menu item **ODT Rental Online Help**

+ Purchase Invoice	> Reports	Excel Reports
+ Rental Quote	> Rental Management	Rental Report
	Rental Management Setup	
	Rental Invoicing Worksheet	
	Group Availability Matrix	
	ODT Rental Online Help	

Click on the link **Online Documentation**

Solution home

ODT Rentals 365

Support and Help (3)

Support Contact Information

Online Documentation

Internal Finance Dynamics Web Services

End User License Agreement (1)

ODT Rentals 365 EULA

Click on the link
<http://odtrentals365help.opendoorrentalsoftware.com/>

Solution home / ODT Rentals 365 / Support and

Online Documentation

Modified on: Fri, Feb 3, 2017 at 10:56 AM

For our online documentation and help site please visit:

<http://odtrentals365help.opendoorrentalsoftware.com/>

Did you find it helpful? Yes No

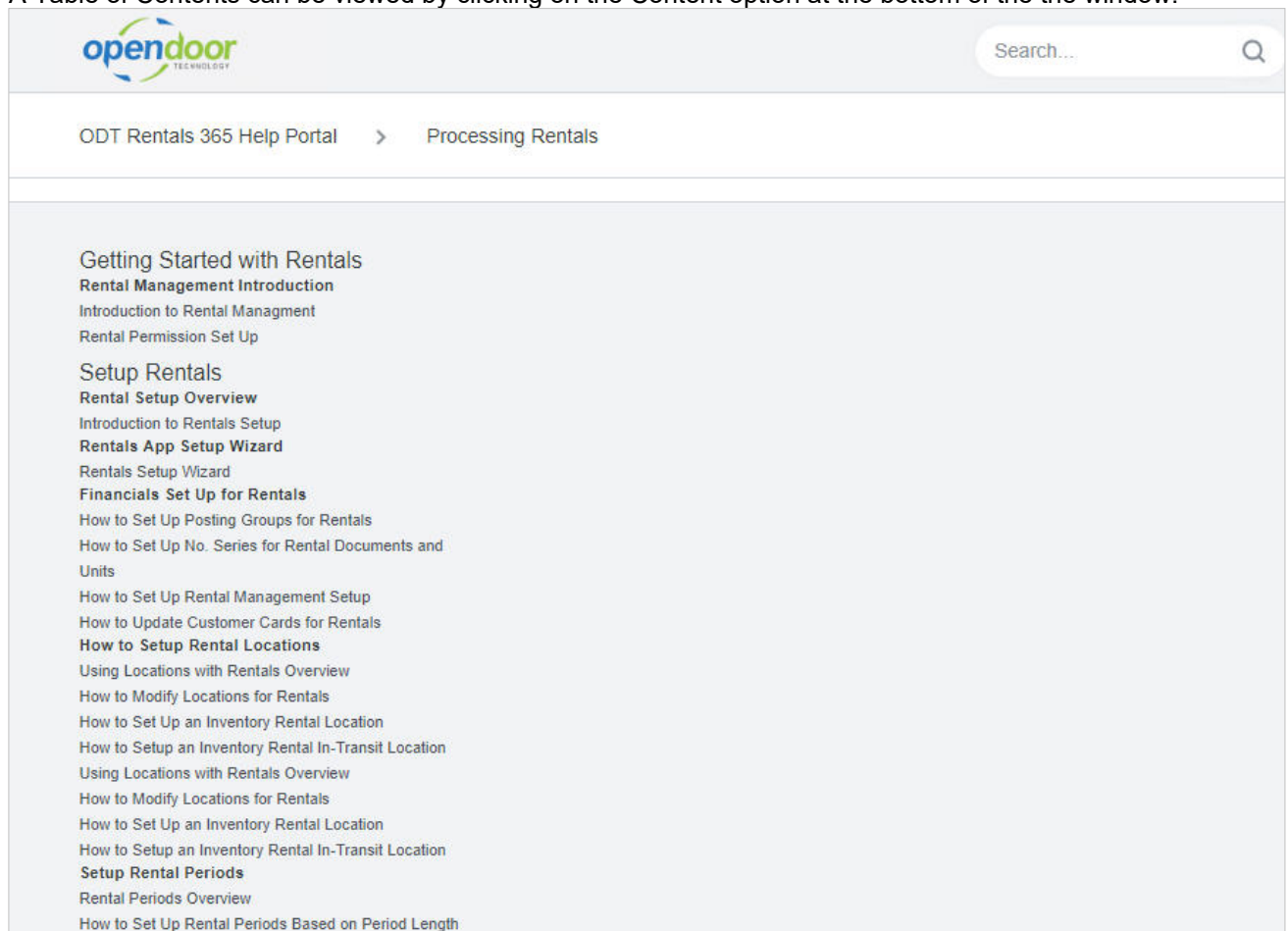
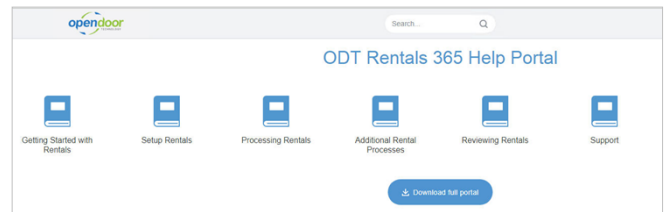
ODT Rentals Online Help

The picture provided here is the initial window for the ODT Rentals Help Online Help.

There are various categories which group the help to aide users in locating the hlep needed.

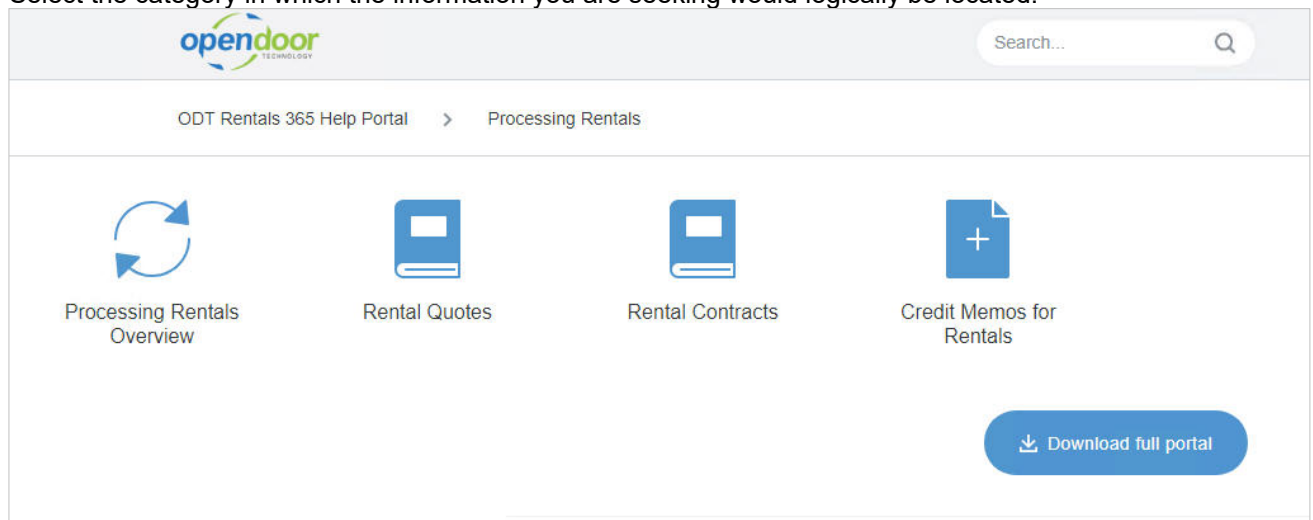
In additon a user can use the Search at the top of the window to locate the help they are looking for.

A Table of Contents can be viewed by clicking on the Content option at the bottom of the the window.



Click on the ODT Rentals 365 Help Portal - Processing Rentals category

Select the category in which the information you are seeking would logically be located.



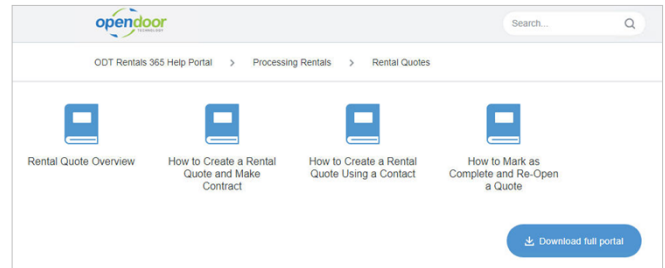
IMPORTANT

The user help was created from a Dynamics 365 Business Central for North America, United States company. Therefore the help refers to Tax Group Code.

Should your organization be using the Rest of World version of Business Central, then throughout the help, consider Tax Group Code to refer to VAT Prod. Posting Group.

Click on Rental Quotes

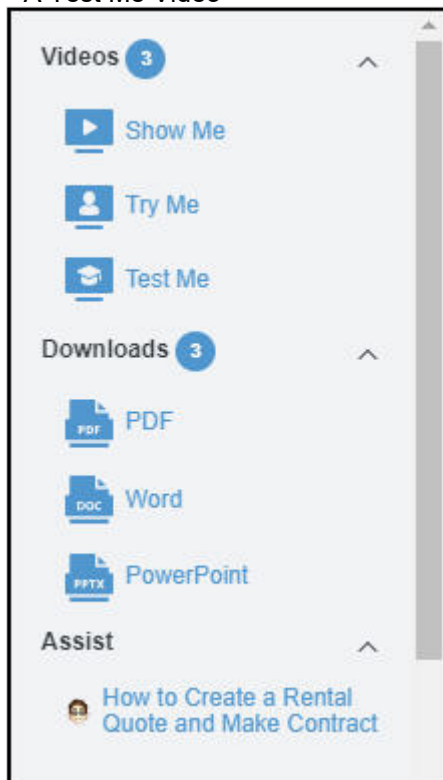
Select the category in which the information you are seeking would logically be located.



When a category is selected, the documentation will open in the Process Description format.

Other formats available include the following, which are accessed in the upper right as shown in the picture.

- A PDF Document
- Power Point Slides
- A Show Me Video
- A Teach Me Video
- A Test Me Video



In the Process Description format:

To move from one document to a different document included in the category selected, at the right and left of the screen, indicators are provided that enable you to move forwards and backwards through the documentation.



6.2. How to Access ODT Rental Release Notes

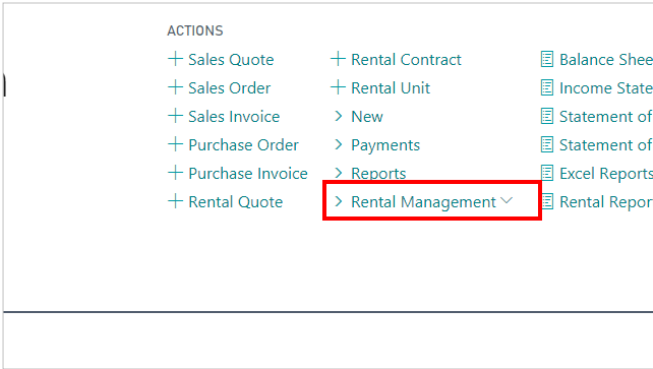
6.2.1. How to Access ODT Rentals Release Notes

There are Release Notes created based on Dynamics 365 Business Central for North America and Global (Rest of World).

The Release Notes contain information on new features added and outlines the issues which have been resolved.

The following demonstrates how to access the ODT Rentals 365 Release Notes for North America and Global (Rest of World).

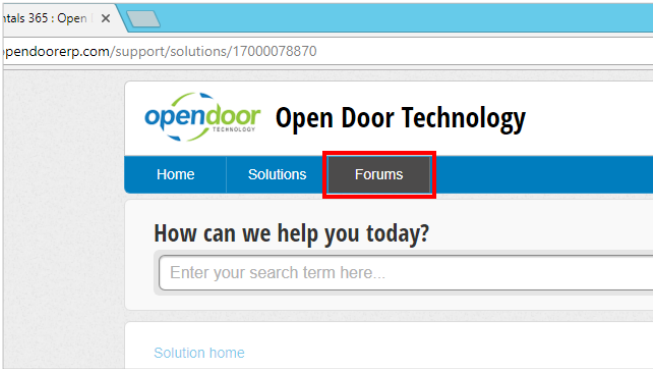
Click on the navigation menu item popup **Rental Management**



Click on the navigation menu item **ODT Rental Online Help**



Click on the link **Forums**





Click on the link **ODT Rentals 365**

How can we help you today?

Enter your search term here...

Community forums

ODT Rentals 365

Release Notes NA (30)

Release Notes NA 7.0.0.3
Posted by Anna Stapleton, 2 months ago
Last Reply by Anna Stapleton 2 months ago

Release Notes NA 7.0.0.1
Posted by Anna Stapleton, 4 months ago

Click on **Release Notes NA 30**

How can we help you today?

Enter your search term here...

Community forums

ODT Rentals 365

Release Notes NA (30)

Release Notes NA 7.0.0.3
Posted by Anna Stapleton, 2 months ago
Last Reply by Anna Stapleton 2 months ago

Release Notes NA 7.0.0.1
Posted by Anna Stapleton, 4 months ago
Last Reply by Anna Stapleton 4 months ago

Click on **Release Notes - Global (Rest of World) 4**

How can we help you today?

Enter your search term here... **SEARCH**

Community forums

ODT Rentals 365

Release Notes NA (30)

Release Notes NA 7.0.0.3
Posted by Anna Stapleton, 2 months ago
Last Reply by Anna Stapleton 2 months ago

Release Notes NA 7.0.0.1
Posted by Anna Stapleton, 4 months ago
Last Reply by Anna Stapleton 4 months ago

Release Notes - Global (Rest of World) (4)

Release Notes 6.1.1 Global(RoW)
Posted by Kyle Lavery, 4 months ago
Last Reply by Kyle Lavery 4 months ago

Release Notes 6.0.1 Global(RoW)
Posted by Kyle Lavery, 4 months ago

Click on the link **Release 2.5.0.0**

Click on the Release Note record that you wish to open the document for review in the list below either the Release Notes NA or the Release Notes Global(Rest of World).

ODT Rentals 365

Release Notes (11)

Release 1.0.0.4
Posted by Christian Roach, 2 years ago

Release 2.5.0.0
Posted by Anna Stapleton, 6 days ago

Release 2.4.0.1
Posted by Anna Stapleton, a month ago

Release 2.4.0.0
Posted by Anna Stapleton, a month ago

Release 2.3.0.2
Posted by Anna Stapleton, 2 months ago



Click on the link **ODT Rentals ...**

This will open the PDF document related to the Release Note record selected.

Discussions / ODT Rentals 365 / Release Notes

Release 2.5.0.0

Anna Stapleton

started a topic 6 days ago

ODT Rentals 365 Release Notes V2.5.0.0.pdf

ODT Rentals ...

(526 KB)

Login

 to post a comment

ODT Rentals Online Help

5/15/2024

2540/2540