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## DynaRent 10.0.37.49 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0)

Release Notes for DynaRent Core, Anywhere for Rental, and DynaRent Mobile

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# Document Information

Title	DynaRent 10.0.37.49 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0)
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# 1 General

## Purpose

This document describes the new functionality developed for DynaRent 10.0.37.49 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0).

The purpose of this release is:

Topic	Yes/ No	Remarks
Upgrade to new Microsoft release	Yes	Microsoft Dynamics 365 Finance and Microsoft Dynamics 365 Supply Chain Management 10 build upon 10.0.34 (for backward compatibility) and validated along with 10.0.37 GA. Refer to this <a href="#">link</a> for more information.
New features	Yes	See chapter 2.1
New D365 functional topics considerations	No	Not applicable
Bug fixes	Yes	See chapter 3.1
Discontinued features	No	Not applicable

## Audience

The audience for this document is certified partners selling and implementing as well as customers who have bought the solution.

## Available languages

DynaRent is available and supported in the English (EN-US) language. Starting from release 10.0.32.47 the languages German, French, Spanish, Portuguese, Dutch, Italian, Norwegian, and Polish are available to be used next to the English language. Starting from release 10.0.35.48, Swedish language is also available, and starting from release 10.0.37.48, the Danish language is introduced. Any other available language is not supported and needs to be maintained by either the partner or customer.

The DynaRent Mobile App is only available in the English (EN-US) language. Other languages are currently not supported.

Anywhere for Rental is only available in the English (EN-US) language. Other languages are currently not supported. It is possible to translate the Anywhere labels (labels used within the mobile processes) or label files (label files used within the standard applications). For the translation, either the translation API of Google or Microsoft is used. In order to use one of the translation services you need an API key from either Google\* or Microsoft\*.

## Product release information

DynaRent 10.0.37.49 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.34. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version 10.0.34 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.37 GA, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarised in the following table.

Release date DNR	Release DNR	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
03/04/2023	10.0.32.47	10.0.29	10.0.32	10.0.29 and above
26/07/2023	10.0.35.48	10.0.32	10.0.35	10.0.32 and above
01/11/2023	10.0.37.49	10.0.34	10.0.37	10.0.34 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if the Client has not deployed the latest release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

For more information about our latest available product versions, the latest validated GA-versions from Microsoft as well as the Minimum MS version required, please visit the page: [Knowledge Base - Support - To-Increase](#)

## Localizations

Available localizations that need to be enabled separately within Dynamics 365 Finance and Dynamics 365 Supply Chain Management to support country-specific requirements do not by default apply for the DynaRent modules. At this point, DynaRent does not support these country-specific localizations. In case this is required it needs to be maintained and supported by a local qualified partner that has full insight in the regulations.

## Data Entities

This release document contains a list of the data entities that are being supported. Data Entities that are not listed are currently unsupported. The supported data entities may only be used for importing and exporting data. The partner may use these as a foundation to further extend them. To-Increase does not have a policy to deliver an import/export data entity for every new functionality.

## Security

DynaRent does not deliver a full set of duties for the entire DynaRent solution yet and we do not ensure that any pre-configured roles work in combination with standard Dynamics 365 Finance and Dynamics 365 Supply Chain Management roles and security.

## Compatibility with other modules

DynaRent is compatible with the following solutions for Dynamics 365 Finance and Dynamics 365 Supply Chain Management 10.0.10 or higher:

Rapid Value	Security & Compliance Studio
Advanced Project Management	Action Management
Advanced Maintenance and Service	DynaRent Anywhere
Advanced Project Planning	DynaRent BI Easy
Product Engineering	DynaRent 365 CE
Business Integration Solution	DynaRent IoT
Connectivity Studio	DynaRent PowerApps Customer Portal
Dynamics Anywhere	DynaRent Employee PowerApps

Note: These are optional, and they each require a separate license and are each a separate deliverable.

## License coverage

DynaRent is governed by three licenses that control access to specific functions and features.

Feature	License	Remarks
DynaRent Rental Order Management Business Objects Work Order Project Planning Utilities Field Service PowerApps	DNR I	
DynaRent DynaRent BI	DNR II	
Anywhere for Rental	DynaRentAnywhere	

Important: It is not possible to run DynaRent without the DNR I license.

## Upgrade from earlier versions

*Refer to the installation guide for more details.*

Upgrade of DNR from DNR for D365 onwards is supported via the use of the migration process and tooling as required to upgrade from Microsoft Dynamics 365 Finance and Microsoft Dynamics 365 Supply Chain Management Enterprise Edition.

If you are upgrading from an earlier version than N-1 please read all the related release notes carefully to make sure you are following the required steps.

## Model delivery discontinued

Models are no longer going to be released from DynaRent 10.0.30.45 release onwards. If you still require the models, please contact our support team with a business reason.

#Note: If you have installed models from any of the previous releases of DynaRent, you must remove them before installing DynaRent 10.0.30.45 or later.



## 2 Features DynaRent

### Danish language added to the DynaRent labels

As per this release, the Danish language is added to the DynaRent labels via our Dynamic translation service.

As of November 1<sup>st</sup> 2023, DynaRent is supported in 11 different languages out of the box. The user interface is, as part of the strategy, available in the next languages: English (US), German, French, Spanish, Portuguese, Dutch, Italian, Norwegian, Polish, Swedish, and Danish.

As we used automated translations and reused existing labels it might be the case that some translations are wrongly translated. With a single translation unit, the AI-powered translation service is not aware if it should be translated as noun or verb. Some words do have multiple meanings, like “application”. It could be related to recruitment or a software solution. If you come across such an issue, please use the in-app feedback or create a support case, so we can improve the translations for future releases.

### Consumption-based billing

As part of this release, we introduce the functionality of consumption-based billing to DynaRent. Consumption based billing will give you the option to invoice the customer based on what has been used.

For example, the number of hours a machine has run, the amount of power the machine in kwh has used, or for how many millimeters of a diamond blade has been used. The calculations for this will be based of the business object meters.

This release will support consumption-based billing based on fixed pricing. In the coming releases, this will be expanded with price tiers and allowance.

At the end of this document, a chapter has been dedicated to explain the setup and the supported processes.

### Work order quote's

As part of this release, we introduce the functionality of Work order quotes. This can be found in the module work order project planning.

Work order quotes gives you the ability to start with quotes and if accepted, create work orders. On existing work orders, it is also possible to create a work order quote to quote the required work for a repair.

At the end of this document, a chapter has been dedicated to explain the setup and the supported processes.

## Additional fields on the form DNRFPMPBusinessobjects

Per request, additional fields have been added as columns to the form DNRFPMPBusinessObjects.

- Order number
- City (work location)
- On-rent date
- Expected off-rent date
- Off-rent date
- Return warehouse
- Serial number

## Right click menu on service plan board enlarged

The right-click menu on the service plan board has been enlarged to display more information, without having to scroll. As it was noticed a number of our customers had made this adjustment, we decided to enlarge it from the product site.

Keep in mind when this release is installed, as this functionality is adjusted, that it could have an impact on your customizations.

## Service plan board performance improvements

In this release, there has been worked on the performance of the drag and drop functionality between the unplanned and planned sections. Planning of tasks from the unplanned section to the planned section should take less time. The exact time improvement depends on the customer's setup and if the dual write is enabled.

## RO change date performance improvements

The performance of the change date functionality on the rental order has been improved.

The exact time of these improvements depends on the customer's system and if the dual write is enabled. Keep in mind, that as our product is an extension over the standard F&O platform, that the performance is limited to the standard F&O sales order performance.

## DNR Menu items licence level lowered

The license level required for the menu items 'RORSALESTABLE' and 'RORSALESTABLELISTPAGE' has been lowered.

## Extension points added for the return note functionality

Per the request of a customer extension points have been added to the return note functionality.

PurchRORReturnNoteJournalPost.updateRentalDates  
SalesRORReturnNoteJournalPost.updateRentalDates  
DNRPurchPackingSlipJournalPostClass2\_Extension.  
DNRPurchRORReturnNoteJournalPostClass\_Extension.  
DNRSalesPackingSlipJournalPostClass2\_Extension.  
DNRSalesRORReturnNoteJournalPostClass\_Extension.

## Extension points added for Ainscough

Per the request of Ainscough, the following extension points have been added.

Class: FINProjHourCalcEngine  
Method: process()  
Table: FINInvoicePeriodQtyFinancial  
Method: DNCMarkUnMarkDateTimeForCredit()  
Class: DNRProjJournalCheckPostClass\_Extension  
Method: FINUpdatePeriods()  
Form: WPPServicePlanBoard  
Method: setSettings()  
Method: DNRDNCInitFromContractTableRentalOrder()  
Table: RAGContractDataParm  
Method: DNRDNCInitFromContractTable()  
Form: RAGContractDetails  
Method: initFormClass()  
Class: WPPTaskAssignmentEngine\_Service  
Method: assignToMultipleResources()

## Method made public

### SalesLineType\_RORRental.updateExchangedSalesLine()

On request the method SalesLineType\_RORRental.updateExchangedSalesLine() has been made public so it can be accessed for customization.

## Discontinued features for this release

Starting 2024 the Credit note functionality on the rental order and the Credit approval in the rental order management list page will be discontinued, as this will be replaced by the (project) Rental credit wizard.

No functional topics were discontinued in this release.

### 3 Features DynaRent Anywhere for Rental

New features for this release

ID	Description
163146	In the picklist, the user can see the picklists from all the warehouses. Filters are adjusted to show the filtered list of picklists per user
165445	The ability to populate Return proposals based on all rental order lines that are delivered is added.

### 4 Features DynaRent Anywhere for Rental

New features for this release

Id	Title	Description
166243	Optimize drag-and-drop functionality	The performance of drag and dropping an unplanned task to the planned section is improved significantly.

# 5 Fixes for this release

## Fixes for this release

Functional Area	ID	Title
Service plan board	154240	Browser update causes refreshing issues in the service plan board After the latest browser updates (Edge and Chrome) the Drag & drop function does not result into a form Freeze anymore
Rental credit wizard	160803	Rental credit wizard: error when posting full credit if charge exists with Keep = Yes In a scenario, it was found that the system created an error when a Rental Credit Wizard Full credit was posted with a charge that has keep = yes. The error has been resolved.
Asset availability	162365	Available assets not shown in Asset Availability Changing the rental type on a business object will now also update the rental type on the availability transactions and rental transactions. The system will inform the user that this will happen. This affects all relevant transactions which influence asset availability and Rental on hand.
Service plan board	163964	Column filters aren't saved in views on SPB unplanned tasks Due to technical restrictions, applied column filters cannot be saved in the views on the SPB. But it was possible to store the filters separately. This does mean, the user-applied filter is not saved per view, but for the whole SPB.
Work orders	164321	Incorrect Item requirements amount in the 'Work order overview' report It was found that when there were multiple item requirements on a WO, that on the Work order overview reports the quantities were shown incorrectly.
Work orders	164345	Work order is not auto-updated if a change on a line was triggered from a return note or a return journal Only valid for rental lines linked to invoice profile 'Base on packing slip/return'. The return does the actual update of the Off-rent date. When template tasks are in sync with Off rent, the work order line data are updated accordingly
Service plan board	165201	The "Picking route has been completed" Icon on the Service Plan Board layout manager is not working The icon for Picking ready shows in the unplanned task area when picking is completed.
Work orders	165376	Related work orders not showing on the Purchase order Purchase orders with linked work orders will show the 'Work orders' option on the General tab on the purchase form.
Rental credit wizard	165397	Rental credit Wizard - not able to re-invoice after full credit with re-invoicing After a full credit in the Rental credit wizard, with re-invoice = Yes. The credited lines will be shown for re-invoicing.
Rental order	165726	Incorrect labels in the Create rental order form opened from the Business object availability report Adjusted on the dialog Create rental order the labels for the date fields On-and Off-rent

Rental line editor	167290	Fixed insurance changes unwantedly when RLE is opened again Fixed insurance changes on KIT lines are now properly saved and not recalculated when the RLE is opened again.
Rental line editor	167733	Inconsistent rental order line amendments Price and discount amendments are saved in all scenarios with invoice profile 'Enable update invoiced periods = No'
Rental line editor	168652	Amendments in RLE are not saved when the "Enable update of invoiced periods" parameter on the invoice profile = NO Changes made in the RLE in an invoice period that has an invoice profile with "Enable update of invoiced periods" = No, will give an error now instead of a warning and nothing is saved, as nothing is changed. Further if "Enable update of invoiced periods" = No and the RLE is opened, the form is pre-populated with the date of the first un-invoiced period
Rental onhand	169107	Adjust 2 Rental quantity labels when the Physical stock parameter is enabled Adjusted 2 labels from Rental quantity to Physical Rental quantity on the forms Picking list registration and Adjust On-hand rental inventory when the "Use Physical rental quantity parameter is enabled.
Rental totals	169137	Update Rental totals batch job not working Periodic function for updating rental totals, refactored to continue after an error. Please check the error log in the job for details about the error.
Rental quote	170104	When we convert a sales quotation to an SO the redirect button isn't working After confirming a quote the related information on the general tab for sales orders will open the Rental order
Business Objects	170175	Manually adjusting Rental Asset Status kicks the user back to the first BO in the list When the user adjusted the Rental asset status on the BO, then the user would be kicked back to the first BO on the list. Adjustments have been made to keep the user on the BO where the change was performed.
Rental line editor	170214	Performance of opening RLE Rental lines editor process adjusted to improve the performance while using RLE editor v2.
Rental quote/order	170746	Discount percentage change leads to a unit price of 0 The discount percentage field for sales items on the project rental quotation was not working correctly. This has been changed/removed. Instead of the standard D365 field Discount %' (=LineDiscPercent), now the field Rental disc. % will be used
Service plan board	170785	Service Plan Board - performance improvement on planned section The drawing of the planned elements in the planned area has been optimized so less processing time to build up the planned area is needed.
Rental Invoicing	170795	Analytical date error during transfer to project invoicing for an invoice period that was marked as credit. Rental order transfer to project invoicing, the credit posting period is now determined from the original period for the periodic distribution.
Price tier	170989	Price tier still recalculated from header date change when clicking "No" when prompted Only valid for lines with invoice profile option Price tier calculation: When created. If "No" is stated, no recalculation is done.
	171361	The Business object filter in the Business object form opened from the

Asset availability		Asset availability doesn't work The business object filter on the business object form opened from the asset availability form didn't allow the user to filter on a specific BO. Adjustments have been so the filter field can be used in this scenario.
Dimensions	171496	Financial dimension linked to a site not populated when the warehouse is defaulted from worker Financial dimensions linked to the site are now populated on purchase orders based on the warehouse, which was defaulted from the worker.
Fixed asset journal	171623	Fixed asset book not picked up in Fixed asset to Inventory line, when status Book is "Closed" Closed asset books are now open to select on Asset to Inventory journals. An asset book can get closed status because all transactions have been depreciated until the remaining value. After posting the journal the book status will be either Sold or Scrapped.
Fixed asset journal	171843	Fixed asset to Inventory Journal - Financial dimensions not defaulted from FA Book when Bulk is sold In the Bulk fixed asset proposals, the dimensions of the selected asset books are updated on the created journal lines.
Project invoicing	171927	Wrong invoice period update on project rental orders In rental project invoicing, if a period was marked for credit, due to a price change and the credit is invoiced before the new invoice is done for the invoice period. Then the invoice period received an incorrect status, resulting that it can be credited again. This has been adjusted and the invoice period will receive now the correct status.
Work orders	172184	Not able to open additional notes in All work order lines screen Using header notes on the work order would result in an error. An adjustment has been made and header notes on work order can now be used.
Rental order	172327	Damage and Manco workorders not visible via rental order Damage and manco work orders created in the Return quality inspection process are differently connected and this caused a error if the user would try to move between the rental order and work order. This process is adjusted so the user is now able to go from the RO to the WO and back.
Service planboard	172454	Service plan board, drag and drop in planned tasks does not update correct scheduled time If a planned task that was planned for 2 hours, was dragged and dropped to a different day, where on the SPB the planning is done per day, then the task would be adjusted as it was planned for an entire day and not keep the 2 hours. This has been adjusted.
Rental order	172456	Product description incorrect on assignment swap on order line If a different object, with a different rental type was selected for a rental order line, then the item would be changed, but the product name would not be adjusted. Adjusted, so the correct product name is displayed.
Service plan board	172707	Internal note on internal task is not shown On the service planboard, the internal note on the internal task is now correctly displayed.
Rental order invoicing	172739	Transfer to project flik flak does not update to status "Credited" Rental periods that are marked for credit on orders with Transfer to project, would stay on status pending credit if the invoice period was credited, where they should have changed to Credited. Adjustments were

		made, so the status field is updated correctly.
Sub rental	172891	Sub-rent project related does create a Purchase sales transaction Subrental orders connected to project rental orders generated an incorrect chargeable purchase sales item transaction on the project during invoicing. The following adjustments are made to correct this, the sales price is put to zero and will receive line property Not chargeable. It will define the chargeable value through a new parameter setting. In the rental parameters, under General, make sure the update the field "Line property for sub-rental costs".
Asset availability	173161	Asset availability from project quotation header/line and from rental order header/line gives an error. The asset availability form opened from (project) rental quotations and (project)rental orders would give errors if the same item and rental type ID was used multiple times on the order. Adjustments made will now check if there are multiple lines with the same rental type and only display one when the asset availability is opened.
Work order project planning	173754	Item requirements on Task level cannot be deleted. The system blocked the option to remove item requirements from tasks with an error. This seems to be blocked by the item's requirements on the business objects. The user is not able to remove item requirements from tasks.
Work order project planning	173976	Work order lines are blocked from deleting due to rental transactions In certain scenarios, the user was blocked from removing the work order task line from a work order, with the status created. The error was caused by rental transactions on manually created work orders and work orders created from confirmed rental orders.
Fixed assets	174028	Subrental for bulk items creating fixed assets in legal entity Bulk items that were used for the first time on sub-rental orders in a legal entity created an additional fixed asset in the fixed asset registers.
Work order project planning	174512	Workorder task lines, with tasks related to asset availability setup, were blocked from deleting A workorder line with a task related to an Asset availability setup could not be deleted. The delete action is not possible when an open hour-, fee-, expense-, item- journal exists (they have to be manual removed before delete is allowed. Any rental transaction against this work order line will be delete as well.) The check for project translated transactions remain in except for multiple workorder lines referring to the same projectid. Only on the last workorder line for this projectid the check will be enforced.,
Work order project planning	174552	Some fields are not auto filled when creating a PO on a task When creating a Purchase order on a work order task, some of the mandatory fields(Invoice account, currency, language) were not auto filled.
Rental line editor	174720	Minus discount figures when change discount on part KIT A scenario was found with adjusting the discounts via the RLE on kit lines multiple times resulted in a minus discount.
Mobile app	175226	Default work order template for Mobile app only allows 10 characters in parameter setup The default work order template parameter for the mobile app in the Work order parameters only allowed assigning template with a maximum length of 10 characters. This prevented selecting templates with a longer length. This is adjusted to the same size as what is allowed on the work order template id.



Rental order Transfer to project	175361	Transfer to project causes infinite loop A customer found a scenario on the rental order with an item on a work location, where an off-rent date was used a few days in the past and with the calculation date today, during the calculation in the transfer to project the system entered in an infinite loop. The Issue has been resolved.
Mobile	149420	Pass all the checks - impacts the sequence order of the task list. This is now fixed.
Mobile	172157	If you set the time period to 1440 in the service plan board and plan a task to a resource, it is shown in the mobile app on the incorrect date. This is fixed.
Mobile	173445	In the Dual Write Table for Work Order Line Employee App Registrations (ti_dnrmobilejourtranses), there are two fields which need to be removed as they give an error when running the initial sync. They can be removed manually, but for every installation and whenever the tables are refreshed, they will re-appear and need to be removed again. These are now removed completely.
Mobile	173488	Mobile app synchronization of Task checklist has problems during sync. This has been fixed.
Mobile	175226	Default work order template for Mobile app only allows 10 characters. Error is thrown if the template has more than 10 characters. This is now increased.
Anywhere for Rental	131012	Multiuser Picking: Getting error message to one user, when two user picks partial quantity of an item simultaneously. This is fixed in anywhere mobility studio platform.
Anywhere for Rental	170363	when you add any item from Anywhere for rental through the Rental counting the on-hand count is different from the on-hand count which is shown in the Rental counting journal. This is now adjusted to show correct quantity.
Anywhere for Rental	173057	Mass return: Blank screens and improper redirections are fixed.
Anywhere for Rental	173140	Quantity of Bulk Rental Item to be returned via Rental Return in the portal is shown incorrectly. This is fixed.
Anywhere for Rental	173320	Lines belonging to different site and warehouse can be added to Rental counting journal via the portal. This is fixed to align with the standard F&O behavior.
Anywhere for Rental	173362	Able to write data to the posted journals from Anywhere for rental is now restricted.
Anywhere for Rental	173574	Discrepancy on rental on-hand, as shown in the item info is now corrected.
Anywhere for Rental	174009	Error while trying to open a posted Rental counting Journal is fixed.

# 6 Known Issues

## DynaRent

*NOTE: Microsoft is investing heavily in Dual-Write as synchronisation tool instead on Data Integrator, it is Microsoft's advice to use Dual-Write. Dual-Write is a near real-time (1-10 seconds) solution and Data Integrator a batch-driven solution which is always slower in displaying information, however Dual-Write can still be "slow" as some synchronisations take a minimum of 5 seconds, which can't be made faster.*

*Also Dual-Write has its limitations, known issues and unsupported features which are described in the Mapping Concept pages of Dual-Write, see the Dual-write home page - Finance & Operations | Dynamics 365 | Microsoft Learn.*

*NOTE: Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them.*

*Currently, we are not testing compatibility with all new features or combinations.*

*Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via To-Increase support.*

## DynaRent Mobile

*o Depending on your licensing model, you might encounter an exception when synchronizing the data from Finance and Operations to the local device, stating "The per app limit for storage has been exceeded. Reduce the amount of data to be stored or use Clear Data to free up space." If this is the case, please review your licensing model and purchase additional licenses as required.*

*o Sometimes, even though resource is configured correctly, first time configuration on mobile app triggers message saying that resource must be filled in. This is not a consistent repro. Try to create Work order from D365 FO and then try the same on mobile app, you can get rid of this ad-hoc issue.*

## Anywhere for Rental

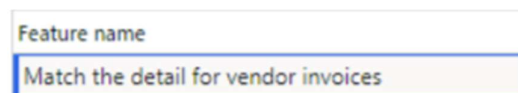
*179156 Quantity of Bulk Rental Item while doing a Transfer Order via Rental Return in A4R App is shown incorrectly.*

*179470 Unable to pick sales item in A4R even when location Dimension is given.*

## Known issues for the release

### Microsoft feature: Match the detail for vendor invoices

Unfortunately, it was discovered during testing that the sub-rental invoicing with variances functionality which was released with number 109281 in the 10.0.13 release is affected by Microsoft's feature "Match the detail for vendor invoices". Please keep this feature turned off if you're using the sub-rental invoicing with variances functionality. We will look at compatibility with this feature in the upcoming period.



## 7 Data Entities for import/export

*Please refer to installation guide for technical details.*

### Changes for this release

No changes were made to the import/export data entities in this release.

### Known issues for this release

Rental shop card entity- shop card activation along with new card import does not work in this version. The rental shop cards should be imported in inactive mode and then activated manually.

## 8 Data entities for Business Intelligence

*Refer to installation guide for technical details.*

### Known issues for the release

Some entities contain fields of the type datetime. Finance and Operations stores the information of these fields as UTC datetime in the SQL database table. To be able to transform this datetime to local time, an extra field is available in the SQL table containing the time zone id. Due to a technical limitation this information is not yet available and will be transformed in the BI data warehouse to a local time, based on a fixed value. It is expected that this issue will be solved in the next release.

### Changes for this release

Below a list with the major changes and impact of the modified data entities for this release. For further information you can contact our support department to provide additional services and/or training to assist in case needed.

## 9 Data Entities for Rental Customer portal

Setting up/implementing the 'Rental Customer Portal' requires the setup of data integration projects to synchronize data from Finance and Operations to Dataverse.

One of the data integration projects that needs to be set up is the data integration project for synchronizing sales invoice line data. A data integration project uses a data entity to fetch data from Finance and Operations.

If you have a data integration project set up for synchronizing sales invoice line data and this data integration project makes use of the 'SalesInvoiceLineV2' data entity (i.e., 'Sales invoice lines V2'), then please create a new data integration project that makes use of the 'SalesInvoiceLineV3' data entity (i.e., 'Sales invoice lines V3'), as the 'SalesInvoiceLineV2' data entity is not supported anymore.

Please refer to the DynaRent Customer Portal release notes for further details.

# 10 Configuration keys

This chapter contains a summary of all the configuration keys that are included in this release, along with the functionality they implement. If you are not using the functionality, please disable the corresponding configuration key. More information on how to disable configuration keys can be found [here](#).

Configuration key	Purpose	Recommendation
DynaRent CE Integration	Supports the DynaRent CE product and functionality	Disable if the DynaRent CE product is not being used
DynaRent PowerApps	Supports the DynaRent Mobile product and functionality	Disable if the DynaRent Mobile product is not being used
Rental customer portal	Supports the DynaRent Customer portal product and functionality	Disable if the DynaRent Customer portal product is not being used
Rental data entities (BI)	Support the DynaRent BI product and functionality	Disable if the DynaRent BI product is not being used
Keep deleted DynaRent * objects	Objects that have been deprecated between certain periods	Disable after usage of the deprecations have been refactored
Deprecated features	Objects that have been deprecated	Disable after usage of the deprecations have been refactored
On-hand rental inventory	Support the on-hand rental inventory functionality	Enable
Fleet number	Support the fleet number functionality	Enable
Additional notes	Additional notes on work orders	Enable
Rental dates	Supports the rental dates functionality	Enable
Rental invoicing	Supports the rental invoicing functionality	Enable
Rental shop	Supports the rental shop functionality	Enable
Tax matrix	Support the tax matrix functionality	Enable
Assign serial	Supports the assign serial functionality	Only enable when you want to use this functionality (by default it is disabled)
Anywhere for Rental	Supports Rental specific Anywhere applications	Only enable when you want to use this functionality (by default it is disabled)
Consumption-based billing	Supports consumption-based billing functionality	Only enable when you want to use this functionality (by default it is disabled)
Work Order Quotation	Supports work order quotation functionality	Only enable when you want to use this functionality (by default it is disabled)

# 11 Roles & Security

This chapter contains the latest information around the roles and security within this release. This release contains a couple of specific roles that we have identified. These roles and related security can be used as foundation for extend it to your own needs. In this release, we do not deliver full duties and privileges for the entire DynaRent solution yet and we do not assure that any pre-configured roles work in combination with standard Dynamics 365 Finance and Dynamics 365 Supply Chain Management roles and security. In the upcoming releases, we will focus on this area in particular by leveraging the standard Dynamics D365 for Finance and Operations security features.

## Roles overview

Below is an overview of the available DynaRent roles in this release:

Role name	Description
Administrator	Administrator
DynaRent User	Simple User
Rental Administrator	Administrator at the rental department
Rental Clerk	Operational rental employee
Rental Coordinator	Coordinator at the rental department
Fleet Finance	Financial overview of the entire fleet
Fleet Manager	Operation fleet manager
Rental Manager	Manager at the rental department
Rental Representative	Sales representative at the rental department
Rental Sales Clerk	Sales representative at the rental department
Service Coordinator	Coordinator at the service department
Service Planner	Service planner
Technical Administration	Manager of the service department
Technical Manager	Technical manager at the service department
Transport Manager	Manager of the transport department
Transport Planner	Transport planner
Workshop Employee	Employee at the workshop
Workshop Manager	Manager at the workshop
DynaRent Field Service Engineer	For employees using the Field Service App
Customer Portal Integration User	For the user account used for Portal integration

## 12 Breaking Changes

*Refer to the installation guide for technical details.*

## 13 Deprecations

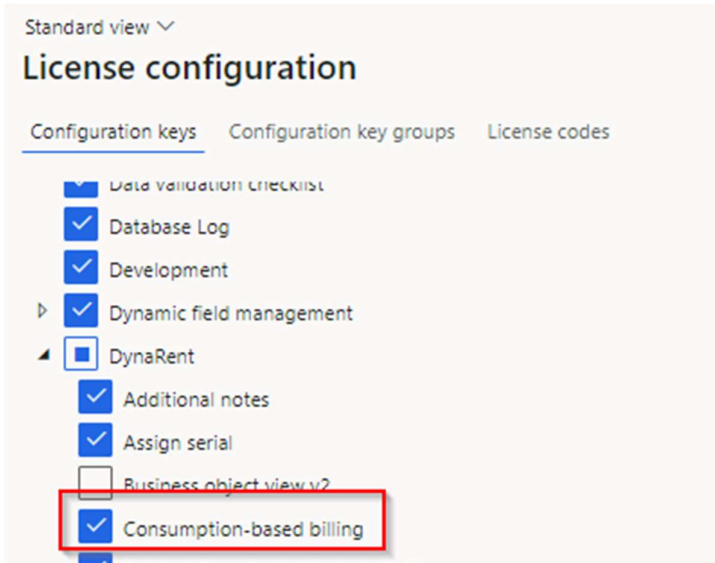
*Refer to the installation guide for technical details.*

# 14 Consumption-based billing

## Setup

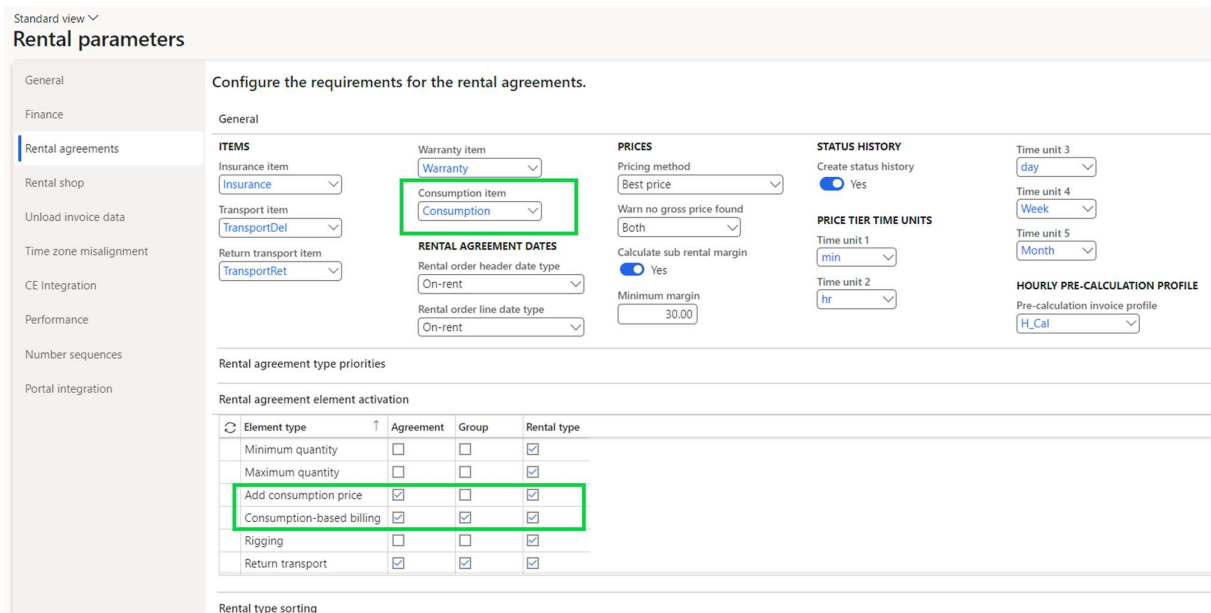
### Configuration key

Consumption-based billing is located behind a configuration key, this means if this release is installed, the functionality will not be available until the configuration key has been enabled.



### Rental parameters

The consumption price components must be active on the Rental parameters:



Using that setup, you can regulate on which Rental agreement level, the consumption price component will be editable. In case the transfer to project option is used for invoicing, you need to define the Consumption item there as well.

### Consumption group

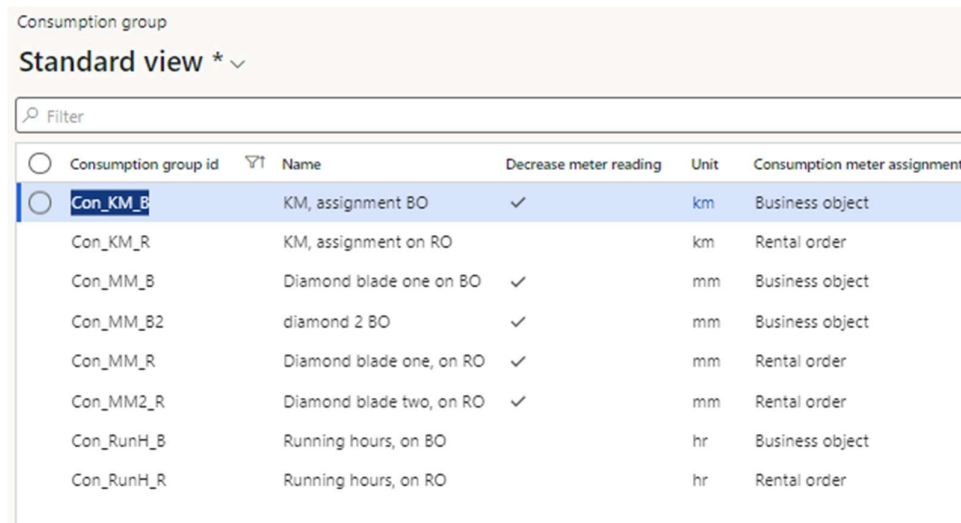
Business objects – Setup – Consumption-based billing – consumption group

All possible type of consumption that needs to be invoiced must be defined as Consumption group.

Consumption groups are used:

- 1) On the business object meters, for determining which meters must be used as an actual consumption for consumption billing.
- 2) On rental agreements, to define the consumption price per consumption group.
- 3) On the rental order lines, for including the consumption group as an additional component that needs to be invoiced on the Rental order. System support billing one or several consumption groups within one rental order line.
- 4) On Rental totals, for including the consumption price component in the standard Rental invoicing calculation.

For the creation Consumption group, you need to define:



The screenshot shows the 'Consumption group' setup interface. At the top, it says 'Standard view \*'. Below that is a search filter. The main part is a table with the following columns: Consumption group id, Name, Decrease meter reading, Unit, and Consumption meter assignment. The first row is selected and highlighted in blue.

Consumption group id	Name	Decrease meter reading	Unit	Consumption meter assignment
Con_KM_B	KM, assignment BO	✓	km	Business object
Con_KM_R	KM, assignment on RO		km	Rental order
Con_MM_B	Diamond blade one on BO	✓	mm	Business object
Con_MM_B2	diamond 2 BO	✓	mm	Business object
Con_MM_R	Diamond blade one, on RO	✓	mm	Rental order
Con_MM2_R	Diamond blade two, on RO	✓	mm	Rental order
Con_RunH_B	Running hours, on BO		hr	Business object
Con_RunH_R	Running hours, on RO		hr	Rental order

#### Consumption group id:

Unique identifier for the consumption group

#### Name:

Description of the consumption group

#### Decrease meter reading:

Enabling this checkbox will allow the user to register lower values on the business object meter. As this is normally prohibited.

#### Unit:

Definition of the unit for the consumption group and meter.

#### Consumption meter assignment:

Defines the level to where the meter readings will be associated.

By using the option Rental order, the system will only invoice the usage based on the meter readings which are connected to the rental order line.



## Invoice profile

On the invoice profile, the field consumption-based billing has been added. With this field, the system determines if the used consumption will not be invoiced, invoiced every period or only is invoiced on the last invoice.

**Invoice profiles**

Invoice profile: Cons\_EveryInv | Description: Cons every invoice

**INVOICING PERIOD**

INVOICE GENERATION: Invoice every: Month(5) | Hourly invoicing: No | Monthly invoicing: No

INVOICING POINT: Monthly period: Specified day | Day of month: 1 | Week: First | Date/time type: None

**Charging period**

CHARGE CALCULATION: Invoicing cut-off time: 00:00:00 | Grace period on-rent: 0 | Grace period off-rent: 0 | Cut-off calculation: | Control child lines invoicing: No | Enable update of invoiced periods: Yes

Consumption-based billing options: Every invoice period, None, Every invoice period, Last invoice

## Rental agreement

The rental agreement has been adjusted to support consumption-based billing.

In the fast tab “Warranty, transport, consumption, and rigging” the “Add consumption price” field has been added with which the consumption-based pricing for a rental type can be enabled.

**Rental agreement details**

Rental agreement number: DEMF-002844 | Rental agreement name: LLO consumption | Rental agreement type: Prospect | Currency: EUR | Rental agreement level: Rental type | Rental type relation: Cons\_12TCrane\_R

**Warranty, transport, consumption and rigging**

**WARRANTY**: Add warranty: No | Warranty price: 0,00 | Rental agreement number: 200,00 | Warranty overridden: No

**TRANSPORT**: Add transport: Yes | Use rental type price: No | Transport price: 200,00 | Minimum quantity: 0,00

Apply maximum quantity: No | Maximum quantity: 0,00 | Rental agreement number: DEMF-002221 | Transport overridden: No

**RIGGING**: Use rental type price: No

Rigging price: 0,00 | Per: | Minimum quantity: 0,00 | Apply maximum quantity: No | Maximum quantity: 0,00

Rental agreement number: DEMF-002221 | Transport price: 200,00 | Minimum quantity: 0,00 | Apply maximum quantity: No | Maximum quantity: 0,00

**RETURN TRANSPORT**: Add transport: Yes | Use rental type price: No

**CONSUMPTION PRICE**: Add consumption price: Yes

Further, a new fast tab has been added called Consumption price. In this fast tab, the consumption groups can be setup that will be used with the meters and the rental order lines for the invoicing. You need to add all possible consumption group on the Default agreement, on the Agreement level. The consumption group can be activated and the price can be overridden on the lowest level of the Rental agreements.

Consumption price						
+ Add - Remove						
Consumption group id	Active	Overridden	Consumption price	Per	Minimum cons...	
CGI006			120,00	Bag	30,000	
CGI007			10,00	day	10,000	
Con_KM_B			0,00	km	0,000	
Con_KM_R	✓		50,00	km	0,000	
Con_MM_B			0,00	mm	0,000	
Con_MM_B2			0,00	mm	0,000	
Con_MM_R			0,00	mm	0,000	
Con_MM2_R			0,00	mm	0,000	
Con_RunH_B			0,00	hr	0,000	
Con_RunH_R	✓		48,00	day	10,000	

### Consumption group id:

Link to the consumption group that has been set up earlier.

### Active:

With the checkbox Active the consumption groups are marked that are used with invoicing with the meters for this rental type.

### Consumption price:

The price amount that will be invoiced per used unit from the meter transactions.

### Per:

Defines that the consumption price per that unit type.

### Minimum consumption:

The amount that will be invoiced to the customer if the usage on the meter is lower than the minimum consumption.

## Setting up meter on business object

Business objects that will be used with consumption billing will require to have the correct meter setup. In our example according to the setup, we have two consumption groups that are active for specific rental type on the Rental agreement. In order to match the consumption group price with actuals consumption and invoice it, on the Business object we must track meters and associate it with the same consumption groups that going to be invoiced. Further system will invoice the usage based on the meters associated with the required consumption groups.

DEMF-013269   Standard view							
Business object meters							
METERS							
Meter number	Description	Consumption group id	Object number	Fleet number	IoT device identifier	Total consumption	
12548		Con_KM_B	DEMF-013269			1.500,000	
2589996		Con_RunH_B	DEMF-013269			2.000,000	

TRANSACTIONS							
Date/Time	Type	Meter value	Description	Work order number	Line	Rental order number	Line number
31-5-2023 06:55:22	Reading	1.500,000			0	102258	1,0000000000
15-3-2023 06:55:09	Reading	1.000,000			0	102258	1,0000000000

## Invoice posting extension

For consumption billing, the consumption price component must be setup as a charges in the Invoice posting form. Here the additional consumption select option is available:

Standard view ▾  
**Posting**

Sales rental order | Sales sub rental order | Purchase sub rental order

Select

- Price
- Discount
- Cost price
- Consumption
- Manual
- Insurance
- Delivery
- Return
- Variance

Item code	Item relation	Account code	Account relation	Rental concept	Charges code
<input type="radio"/> All		All			RentCons

## Other form adjustments

### Rental order line

#### Business object meters

In case the consumption price is active for the rental line, we have the possibility to define the actual consumption via Meter reading registration directly on the rental order. When the BO is already assigned, the Business object meter associated with consumption group on the Rental line. For meters defined on the Consumption price tab, you can define the meter readings via function “Business object meters” on the rental order lines.

Rental order lines

+ Add line | + Add lines | Add products | Remove | Order line ▾ | Financials ▾ | Inventory ▾ | Product and supply ▾ | Update line ▾ | Warehouse ▾ | Rental ▾ | Edit rental lines | **Business object meters**

Order line type	Status	Item number	Product name	Rental Category	Quantity	Unit	Site	Warehouse	Serial number	Fleet
Rental	Delivered	Cons_12TCrane_B	Cons_12TCrane_B several consu...		1,00	pcs	Rental	DEPAL	1236549	

With this function the user can open the business object meters of the business object directly from the rental order line.

#### Business object meters

METERS

Meter number	Description	Consumption group id	Object number	Fleet number	IoT device identifier	Total consumption
12548		Con_KM_B	DEMF-013269			1.500,000
2589996		Con_RunH_B	DEMF-013269			2.000,000

TRANSACTIONS

Register | Adjust rental order

Date/Time	Type	Meter value	Description	Work order number	Line	Rental order number	Line number
31-5-2023 06:55:22	Reading	1.500,000			0	102258	1,0000000000
15-3-2023 06:55:09	Reading	1.000,000			0	102258	1,0000000000

This can be used to register the meter transactions for the business object on the rental order line. If via this menu a meter transaction is made, then the system will automatically link the transaction to the rental order line, to ensure correct invoicing.

The user is also able to adjust the rental order on the meter transaction. He can add or remove the link to the rental order.

### Information on the consumption billing per rental order line

On the rental order line, a new fast tab has been added for consumption-based billing, called "Consumption price". When the rental order line is created, the system fetches the active Consumption price component from the Rental agreement. Active consumption groups with the prices are visible on the Consumption price tab. You can update the consumption price or exclude the consumption group for the invoicing rental line.

Line details

General Setup Address Product Delivery Price and discount Project Foreign trade Financial dimensions Rental Rental dates Loads Fixed assets Consumption price

Include	Consumption group id	Consumption price	Per	Overridden	Minimum consumption value	Meter	Consumption ...	Start meter reading	Current meter ...	Actual consum...	Invoiced consumption	Consumption L...
<input checked="" type="checkbox"/>	Con_KM_B	30,00	km		0,000	12548	km	1,000,000	1,500,000	500,000	500,00	15,000,00
<input checked="" type="checkbox"/>	Con_RuM_B	50,00	hr		0,000	2589996	hr	1,000,000	2,000,000	1,000,000	1,000,00	50,000,00

The following information will be visible to the user:

Field:	Description:
Include	This is standard-enabled, but the user can decide to not include a meter in the consumption billing.
Consumption group id	The value is retrieved from the rental agreement and informs the user with which consumption group id the meter will be invoiced.
Consumption price	Value retrieved from the rental agreement
Per	Value retrieved from the rental agreement and indicates per what unit is calculated.
overridden	Is enabled if the consumption price is overridden on the rental order line
Minimum consumption value	Value retrieved from the Rental agreement and can be overridden here
Meter	Displays the meter from the business object. If a business object with the correct meter setup is assigned, then the meter is automatically filled in this field. If the business object is not yet set up correctly, then this will be a manual action.
Consumption unit	Unit of measure from the consumption group
Start meter reading	Displays the first meter reading. There two scenarios for this field based on the consumption meter assignment that is setup in the consumption group. Rental order: Display the first meter reading value that is connected to the rental order line. Business object: Display the first meter reading which has the reading on the date = Start date of the 1st Invoice period otherwise the reading that has a date closest and after Start date of the Invoice period.
Current meter reading	Display's the current meter reading. Based on: Rental order: Display the latest meters reading which is connected to the current Rental Order line Business object:

	Display the latest reading which has the reading located in the period [start date = Start date of the 1st Invoice period . End date = End date of the Invoice period]
Actual consumption	Difference between Current meter reading - Start meter reading
Invoiced consumption	Displays the quantity that is invoiced
Consumption invoiced amount	Displays the amount that is invoiced

## Rental totals

In the rental totals, the consumption price component are calculated per each invoice period and per each consumption group. You can review expected calculations before posting Rental invoice.

### Invoice journal line details

RENTAL TOTALS									
Order ID	Invoice	Line number	Item number	Object number	Currency	Total charged amount	Internal postings (cost)	Total consumption amount	
102258		1.0000000000	Cons_12TCrane_B	DEMF-013269	EUR	15.200,00	0,00	15.000,00	

RENTAL AMOUNTS					
Rental amount	Discount amount	Insurance amount	Charged periods	Invoiced quantity	
0,00	0,00	0,00	0	1,00	

#### Periods

#### Calculation results

#### Consumption component

<input type="radio"/> Start date/time	ToDateTime	Consumption group id	Actual consum...	Consumption to invoice	Consumption ...	Consumption price	Per	Amount in tra...
<input checked="" type="radio"/> 17-10-2023 00:00:00	30-11-2023 00:00:00	Con_KM_B	500,00	500,00	km	30,00	km	15.000,00

## Invoice journal

In the rental invoice details on the invoice journal the invoiced consumption is logged.

Cons\_12TCrane\_B : Cons\_12TCrane\_B several consumption, BO | Standard view ▾

### Rental invoice details

Order ID	Total charged amount	Internal postings (cost)	Total consumption amount
102258	79.888,00	0,00	65.000,00

#### Rental

#### Consumption component

<input type="radio"/> Start date/time	ToDateTime	Consumption group id	Actual consum...	Consumption t...	Consumption ...	Consumption ...	Per	Amount in tra...
<input checked="" type="radio"/> 15-3-2023 01:00:00	17-10-2023 02:00:00	Con_KM_B	500,00	500,00	km	30,00	km	15.000,00
<input type="radio"/> 15-3-2023 01:00:00	17-10-2023 02:00:00	Con_RunH_B	1.000,00	1.000,00	hr	50,00	hr	50.000,00

## Supported processes

The following consumption based billing processes are supported in this version:

- Consumption based billing can be done on:
  - Rental orders
  - Project rental orders
    - Transfer to project
    - Project invoices
- Invoice multiple meters per business object
- Invoice usage per invoice period or per last invoice

- The following credit scenario's are supported:
  - Marking the invoice for credit in the invoice period.
  - Perform amendments on the rental order line(rental stop, price change, date change).
  - Credit wizard
  - Possibility to correct invoiced consumption only when the consumption is credited.

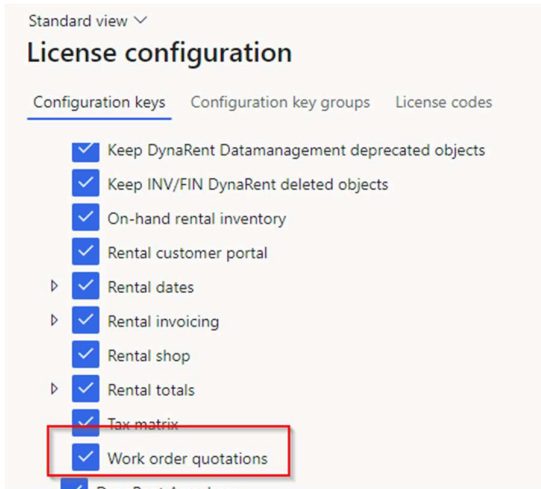
# 15 Work order quote

## Setup

### Configuration key

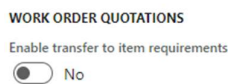
The work order quote functionality is located behind a configuration key, this means if this release is installed, the functionality will not be available until the configuration key has been enabled.

This configuration key can be found under the DynaRent section:



### Work order project planning parameters

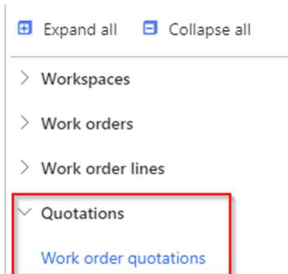
In the work order project planning parameters, under the section General, the option can be found to enable the creation of item requirements from the work order quote.



## Work order quote functionality

### Work order quote list page

The work order quote list page can be found in the module work order project planning:



This will open the list page and will display all the existing work order quotes.

Finance and Operations Preview | Work order project planning > Quotations > Work order quotations | DEMF

← Edit + New Delete Follow up Quote General Options

Accounts: Customer, Prospect, Prices  
Sales prices: Hours, Expenses, Fees, Subscriptions  
Journals: Quotation journal

Work order quotations

Standard view

Filter

Work orde...	Name	Object number	Work order template ID	Work order number	Task ID	Project group	Quantity	Start date	Status
DEMF-0000...	Damage	DEMF-012074	Damage	DEMF-004232	Damage	DNR-Main	1,00	1-8-2023	Sent
DEMF-0000...	Damage	DEMF-012078	Damage		Damage	DNR-Main	1,00	1-8-2023	Created

The following functions are available:

### Follow up tab:

Change status

This function enables the user to change the status of the quote.

← Save + New Delete Follow up Quote General Options

Status

Change status

Change the status of work order quotation

Old status: Sent

New status: Created

Status	Object number	Work order te
Sent		
Confirmed	DEMF-004885	Damage
Cancelled	DEMF-005892	Damage
Lost	DEMF-004471	Damage
Revised	DEMF-000071	450AJS

### Quote tab:

← Save + New Delete Follow up Quote General Options

Accounts: Customer, Prospect, Prices  
Sales prices: Hours, Expenses, Fees, Subscriptions  
Journals: Quotation journal

In the tab Quote, the user has the following functions:

Lookup to the customers, prospects and prices.

Lookup to information on the prices concerning Hours, fees, expenses, and subscriptions.



## Journals: Quotation journal

When a quotation is sent, a quotation journal is created, to record the information which was sent. If the customer requests an adjustment on the quotation, then the user can revise the quotation. If after revising the quote, the quote is sent again, then a new quotation journal is created, to store the new / adjusted information of the quotation.

### General tab:

← Save + New Delete ☺ Follow up Quote **General** Options

#### Related information

Work orders

Related information: Work orders

This function brings the user from the quotation to the work order.

### Work order quote creation

With the button “New” a new work order quote can be created. See the example on the right:

After creating the work order, depending on the setup of the work order template, the following form will be available: (screenshot next page)

Standard view ▾

## Create quotation

### CREATE QUOTATION

#### Customer

Customer account

Name

#### Objects

Business object

Quantity

#### General

##### GENERAL

Project group

Work order template ID

Task ID

Work location code

##### DATES

Start date

End date

##### INTERNAL NOTES

Internal notes

OK

Cancel

Work order quotations | Standard view

DEM-F-00000042 Status Created

Lines Header

---

Work order quotation header

<p><b>DELIVERY ADDRESS</b></p> <p>Delivery name Cons_customer</p> <p>Address Stroomboan 1181 WX Amstelveen NLD</p>	<p><b>OBJECT</b></p> <p>Business object Graf_X_002 A12Wc AWPEDAM</p> <p>Object number DEM-F-000069</p> <p>Work order template ID Damage</p> <p>Task ID</p> <p>Internal notes</p>	<p><b>WORK ORDER GROUP</b></p> <p>Work order number</p> <p>Work location code</p> <p>Start date 1-11-2023</p> <p>Quantity 1,00</p> <p>Status Created</p> <p>Transfer to item requirement No</p>	<p><b>CUSTOMER</b></p> <p>Customer account Cons_Customer</p> <p>Name Cons_customer every invoice</p> <p><b>CONTACT PERSON</b></p> <p>Contact ID 000001</p> <p>Contact Michel Toppers</p> <p>Expiry date</p>
--	--	---	---

---

Work order quotation lines

+ Add line Remove

Task ID	Description	Transaction type	Project category	Line property	Resource	Requested end datetime	Requested start datetime	Currency	Item number	Quantity	Unit price	Net amount	Line number
Damage	Damage	Rem	Rem	Charge		2-11-2023 01:00:00	1-11-2023 01:00:00	EUR	0001	5,00	0,00	0,00	1,0000000000
Damage	Damage	Rem	Rem	Charge		2-11-2023 01:00:00	1-11-2023 01:00:00	EUR	Sugar	1,00	62,00	62,00	2,0000000000

The lines on the work order quote are created based on the item requirements of the tasks of the work order template. In the form, the user can adjust the lines or add more lines, if this is required.

**Expiry date:**

On the form the expiry date is available. The user is able to enter the required expiry date manually. If the user does not enter an expiry date and the quotation is sent, then the system enters an expiry date. This will be the current date plus the amount in the field “Days proposal expires” on the customer.

The value of the expiry date is stored in the quotation journal.

## Work order quote processes

**Created:**

A work order quote starts with the status created. From the status created the status can be adjusted to send, to indicate the quote will be sent to the customer. Further from this status, the quote can also be cancelled.

**Sent:**

A work order quote that has status sent can be changed to the following statuses:  
 Revised, to revise the quote.  
 Lost, to indicate the quote is lost.  
 Confirmed, to indicate the quote is won. This will trigger the creation of the work order.

**Revised:**

A work order quote with this status can be adjusted. After adjusting the quote, this can be sent again to the customer. This will create a new quotation journal.  
 A revised quotation can be changed to lost and or cancelled.

**Confirmed:**

A confirmed quote has created a work order and cannot be changed again.

**Lost:**

A work order quote with the status lost cannot be changed.

**Cancelled:**

A work order quote with the status cancelled cannot be changed.