

DynaRent 10.0.26.42 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0)

Release Notes

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1 General

1.1 Purpose

This document describes the new functionality developed for DynaRent 10.0.26.42 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0).

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 10.0.23 (for backward compatibility) and validated along with 10.0.26 GA. Refer to this link 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

1.2 Audience

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

1.3 Content list

DynaRent 10.0.26.42 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.23. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on version 10.0.23 means that it can be applied to an environment running on D365 version 10.0.23 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.26 GA, we recommend to apply this release on that 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.

IMPORTANT: Customers must make sure to first upgrade to DynaRent 10.0.18.31 or higher before upgrading to MS version 10.0.19.

Release date DNR	Release DNR	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
1/10/2021	10.0.21.35	10.0.18	10.0.21	10.0.18 and above
1/11/2021	10.0.22.36	10.0.19	10.0.22	10.0.19 and above
1/12/2021	10.0.22.37	10.0.19	10.0.22	10.0.19 and above
22/12/2021	10.0.23.38	10.0.20	10.0.23	10.0.20 and above
31/01/2022	10.0.24.39	10.0.21	10.0.24	10.0.21 and above
28/02/2022	10.0.24.40	10.0.21	10.0.24	10.0.21 and above
31/03/2022	10.0.25.41	10.0.22	10.0.25	10.0.22 and above
03/06/2022	10.0.26.42	10.0.23	10.0.26	10.0.23 and above

1.4 Available languages

DynaRent is only available and supported in the English (EN-US) language, any other available language is not supported and need to be maintained by either the partner or customer.

1.5 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 need to be maintained and supported by a local qualified partner that has full insight in the regulations.

1.6 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 foundation to further extend them. To-Increase does not have a policy to deliver an import/export data entity for every new functionality.

1.7 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. In the upcoming releases we will focus on this area in particular by leveraging the standard Dynamics D365 for Finance and Operations security features.

1.8 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:

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

1.9 License coverage

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

Feature	License	Remarks
DynaRent <ul style="list-style-type: none">Rental Order ManagementBusiness ObjectsWork Order Project PlanningUtilitiesField Service PowerApps	DNR I	
DynaRent <ul style="list-style-type: none">DynaRent BI	DNR II	

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

1.10 Upgrade from earlier versions

Refer to 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.

2 New features

2.1 New for this release.

2.2 New functional topics considered for this release

Performance improvements

Several processes were reported slow and have been performance optimized:

RLE Open from a quotation line

RLE sub-kit line expansion

Creation of the quote lines from RLE

Send quote

Confirmation

Transfer to project

Project rental quote form UI optimization

Integration of Visual update for wizards with Credit Wizard

A new feature, “Visual update for wizards” has been introduced by Microsoft in June 2021. Wizards in Finance and Operations apps are special pages that aim to guide a user through a complex or infrequent task in a step-by-step fashion. The Wizard visual refresh feature modernizes the visual appearance of these pages in Finance and Operations apps and more closely aligns the wizard user experience to other Dynamics 365 products.

This new design will become mandatory to use starting from October 2022. It was therefore applied to Credit Wizard functionality within DNR in order to avoid any compatibility issues. Therefore the current version of Credit Wizard can be used with both this new feature enabled and disabled.

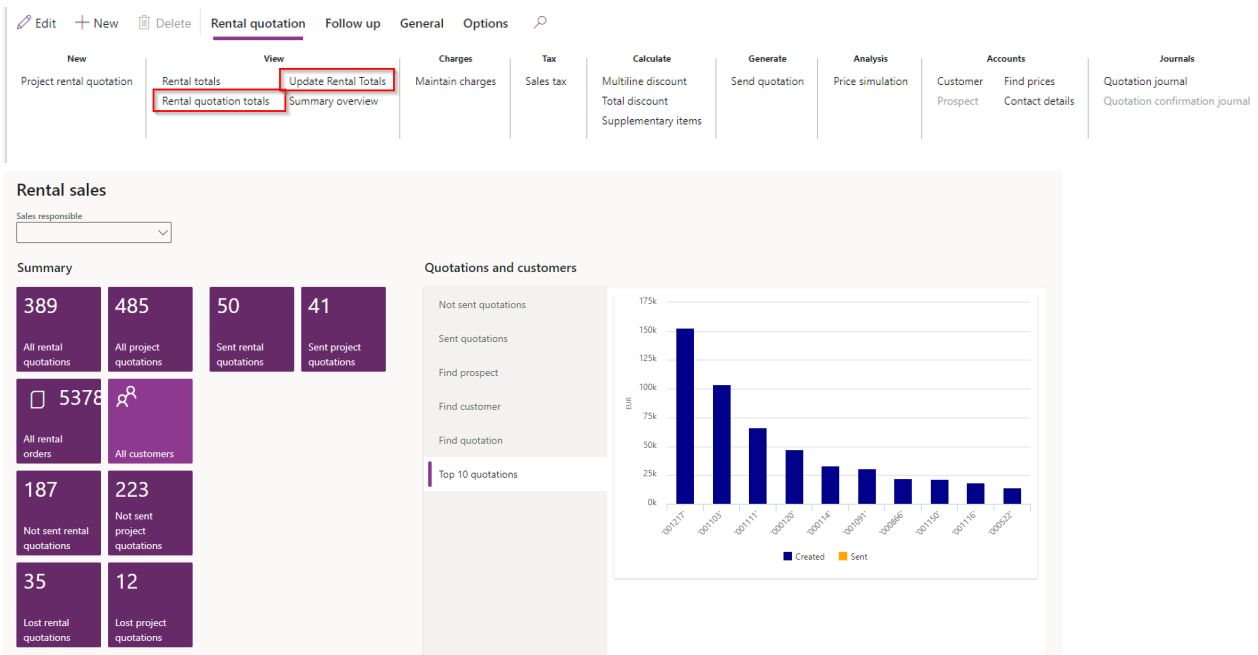
Please validate if any customizations have been done for our customers in form of a wizard as those will need to be upgraded in the same way it has been done for Credit Wizard by the customer.

Link to related documentation from Microsoft: <https://docs.microsoft.com/en-us/dynamics365-release-plan/2021wave1/finance-operations/finance-operations-crossapp-capabilities/visual-update-wizards>

Rental Sales Workspace - update relation to new Rental totals functionality

Rental Sales workspace has been introduced in 10.0.22.36 release in 2021. It includes multiple tiles, graphs, list pages and other useful links. The major disadvantage of this workspace in areas where values were calculated and shown was related to Rental and Project rental quotation totals as those were calculated based on STD F&O principles without information about Rental amounts.

After introduction of Rental quotation totals functionality, which in fact saves quotation totals in a physical table, it became possible to extract this information without lowering performance of the workspace. This has been done in the current release.



Therefore all graphs and list pages, where quotation totals are shown or used in calculations are now showing the most recent information from Rental quotation totals. You can find more information in documentation for 10.0.24.39 release.

Assign serial - single item serial number assignment

Note: The "Assign Serial" configuration key must be enabled in order to be able to use this new feature.

The Assign serial feature adds a lot of value to our standard DynaRent processes in helping our customers gain speed and efficiency in creating and processing orders with large quantities of serialized assets.

Within the Assign serial feature, the same form to create a serial number, based on standard serial number format (defined on inventory parameters), by using custom formats to create and assign serial numbers or by creating manual serial numbers has been added when the order line quantity is equal to 1.

Add extension points to BOBObjectAvailabilityData class

2 extension points have been added to allow the assignment of business objects with category value External. 2 insert_recordset statements were extracted into separate protected methods.

CS00193737 | Change in Excel for correct data entry with 'Open with excel' DNRWorkOrderLineResourceEntity

In line with DNR usability improvements, an update has been done to DNRWorkOrderLineResourceEntity as new fields for Planned from date/time and Planned to date/time have been added. Those have also become available in Excel template which makes it possible to import data both with DIER and Excel add-in.

Note: this is not yet possible to import several lines for the same resource which can be useful for registration of holiday time for example. This possibility is currently being investigated.

2.3 Discontinued features for this release

No functional topics were discontinued in this release.

2.4 New changes for the upcoming release(s)

At To-Increase we continuously investigate how to improve the user experience of our products.

Therefore, we will collect application usage data ('telemetry data') from our applications. We will anonymize any personal data and therefore will only use data which cannot be related to individual persons for this purpose. Furthermore, we will delete the telemetry data from our systems after 12 months.

If you would like to opt-out please contact us.

3 Fixes summary

3.1 Fixes for this release

Functional Area	ID	Title
Rental invoicing	131098	<p>Not recalculated Price tiers in case the off rent/expected off rent date is amended after posting the invoice for the 1st period</p> <ul style="list-style-type: none"> - If a Rental or Sub rental order has Invoice profile with parameter 'based on creation' set up, tier multiplier is defined during creation of an order/quotation. It can be updated later based on changes of calendar or dates for example. In this case user receives a warning with a question whether tier should be recalculated. It's now possible to recalculate the tier also after 1st invoice is posted for an order/quotation which will result in credit notes for all earlier invoiced periods (by design).
Rental invoicing	134919	<p>Analytical date not processed in Multi-Dimensional allocation and credit note is blocked from posting (Normal invoicing)</p> <ul style="list-style-type: none"> - Analytical date functionality allows period related representation for Rental components of type Price, Cost Price, Insurance and Discount. This functionality is especially useful for credit notes as it can indicate to which period originally invoiced amounts belonged to. This is now enabled when 'Credits only' function is used and only credit amounts are posted separate from debit ones.
Transfer to project invoicing	138917	<p>Transfer to project with "Use original date for credit notes" creates imbalance between Project dates and General ledger voucher dates</p> <ul style="list-style-type: none"> - During credit note process it's possible to let system post hour transaction on the same date as original invoice was processed. Earlier this possibility was creating imbalance between General ledger and Project accounting module records, which is now resolved.
Transfer to project invoicing	142293	<p>CS00204183 RO Line with Rental type does not get status Invoiced for Transfer to Project</p> <ul style="list-style-type: none"> - STD F&O status is expected to be changed to Invoiced for lines of type rental or sub rental on a Rental order line, after it's fully invoiced and returned (despite the order). This is now working as expected.
Project invoice proposal invoicing	142703	<p>Project transactions adjustments</p> <ul style="list-style-type: none"> - Blocking error appearing during project transaction adjustment has been resolved.
Intercompany invoicing	143558	<p>Incorrect posting of IC Project Rental invoice - Transfer to project "NO"</p> <ul style="list-style-type: none"> - During confirmation of an Intercompany Rental or Sub rental order a STD F&O charge was created in amount equal to Rental totals of the order due to interference of STD F&O Intercompany charges processing and Rental invoicing. Starting from this release both Intercompany Rental and Sub rental invoices can be posted without errors.

Assign serial	144249	CS00218428 - Error Stack trace: Cannot run form on non-interactive session. <ul style="list-style-type: none"> - When using Order entry deadlines and generate a picking list (split serialized line) on a Rental Transfer Order, a stack trace error appeared.
Assign serial	144266	CS00220787 -Issue with Assign serial - serialized item and supplementary bulk. <ul style="list-style-type: none"> - The split function via generate picking list was resulting in an error: Sales order has been updated by another user. This has now been solved.
Assign serial	145201	CS00220812 RT April: Created lines have status Ordered after assign object even when initial line was Confirmed (therefor AA status remains "Available" instead of "Assigned") <ul style="list-style-type: none"> - In the specific scenario where new lines are added on an existing rental order with confirmed lines, the new lines status is incorrect after generating the picking list. This has now been solved.
Service plan board	139311	Region calendar is not selected correctly in service plan board <ul style="list-style-type: none"> - When selecting region calendar in service plan board, the system did not display the relevant filtered resources. This has now been solved.
Service plan board	141147	Status line Created cannot be added/edited in the background color list in the Layout Manager <ul style="list-style-type: none"> - System gave an error when adding the line status Created to the background colour list in the Layout manager. This has now been solved.
Transport plan board	141160	Task type Internal load cannot have a higher status then the task type Delivery <ul style="list-style-type: none"> - When trying to complete the internal load task before the Delivery task, then the system informs that the internal load task cannot be of a higher status then the parent task. This has now been solved.
Rental counting	142814	Missing Site, Warehouse and Serial Number in 'Counting list' print form <ul style="list-style-type: none"> - The Site, Warehouse and Serial number values are printed in the 'Counting list' print form similarly to the printed form from the Inventory counting journal.

4 Known Issues

4.1 Known issues for the release

4.1.1 **General**

5 Data Entities for import/export

Please refer to installation guide for technical details.

5.1 Changes for this release

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

5.2 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.

6 Data entities for Business Intelligence

Refer to installation guide for technical details.

6.1 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.

6.2 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.

7 Data Entities for PowerApps

The PowerApps solution is under re-structuring and make-over phase. The release notes will be updated along with the app release in upcoming releases.

8 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.

9 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)

10 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 with 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.

10.1 Roles overview

Below 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 work shop
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

11 Breaking Changes

Refer to installation guide for technical details.

12 Deprecations

Refer to installation guide for technical details.