

# DynaRent 10.0.28.43 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0)

Release Notes

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# Document Information

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|--------------------|--|
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# 1 General

## Purpose

This document describes the new functionality developed for DynaRent 10.0.28.43 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 10.0.25 (for backward compatibility) and validated along with 10.0.28 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

## Content list

DynaRent 10.0.28.43 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.25. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on version 5 means that it can be applied to an environment running on D365 version 10.0.25 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.28 GA, we recommend applying 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.

| 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            |
| 05/08/2022       | 10.0.28.43  | 10.0.25                       | 10.0.28                        | 10.0.25 and above            |

## 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.

## 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.

## 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.

## 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 by leveraging the standard Dynamics D365 for Finance and Operations security features.

## 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 |

## License coverage

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

| Feature  | License | Remarks |
|--|---------|---------|
| DynaRent<br>Rental Order Management<br>Business Objects<br>Work Order Project Planning<br>Utilities<br>Field Service PowerApps | DNR I   |         |
| DynaRent<br>DynaRent BI  | DNR II  |         |

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



## 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

## New for this release.

### Subrental orders: Back-to-back delivery (to own warehouse)

#### Why?

Sub rental equipment needs to be prepared in own warehouse before its delivery to the customer.

#### What?

Introduce a “back-to-back” style sub rental order.

The sub rental order is created off the back of a rental order, but the delivery address will be the warehouse address of the order line.

While creating the sub rental order the rental dates of the sub rental order so that it is different to the rental order.

#### How?

New fields are introduced in Rental parameters and on Vendor accounts which allow to define a period to prepare sub rented assets and to check them after picking up at customer and bringing back to vendor. A calendar can be applied in this case, if it is not done, all calendar days will be considered. Also, those parameters can be different on a vendor level, if “override” button is activated.

Standard view ▾  
**Rental parameters**

General | Set up general rental orders information

Finance | Rental agreements | Rental shop | Unload invoice data | Time zone misalignment | CE Integration | Number sequences | Portal integration

**ORDERS/QUOTATIONS**  
Default rental mode: Default ▾  
Auto create rental project:  Yes  
Quick Order Entry:  Yes

**WORK LOCATION**  
Work location mandatory:  No

**RENTAL CALENDAR**  
Rental stop: Closed ▾  
Rental activation: Open ▾

**SUB RENTAL**  
Sub rental warehouse: Subrental ▾

**RENTAL LINES**  
Open rental line editor: On rental line creation ▾

**FUEL**  
Fuel item: Fuel95 ▾  
Fuel posting control: Error ▾  
Don't post fuel before final invoice:  No

**ENABLE RENTAL LINE EDITOR V2 - PREVIEW**  
Open rental line editor V2:  Yes

**BACK TO BACK SUB-RENTAL**  
Sub rental on-rent date offset: 2  
Sub rental off-rent date offset: 2  
Rental calendars: 05 ▾

**SYNCHRONIZATION**  
Open linked order for synchronization:  Yes  
Post sub rental order automatically:  No

All vendors | Standard view ▾  
**DE-001 : Opal Audio**

Purchasing demographics: EUR | 3600 | -- | -- | -- | -- ▾

Invoice and delivery: DE-001 | -- | -- | CIF | 10 | AP-DOM ▾

Purchase order defaults: -- | -- | -- | -- | -- | -- ▾

Sub rental order defaults: ^

**SUB RENTAL ORDER**

Invoice profile: MonthER  
Rental calendar: 05  
Rate code: Month30

**Override**:  Yes  
Sub rental on-rent date offset: 2  
Rental calendars: 05  
Sub rental off-rent date offset: 6

After the setup is done, back-to-back Sub rental order can be create after confirmation of Rental orders via new buttons, which open additional screens with editable date fields prefilled based on set up. After all relevant information is added, new order will have back-to-back tick box activated on the header level and further processing does not include automatic steps.

## Sub-rental orders: Sub rental order management grid

### Why?

To view sub rental equipment with associated rental orders

To manage sub rental fleet timely and efficiently

### What?

Introduce new overview with relevant information and filter options to cover most important user scenarios.

### How?

Access Sub rental management menu option via Rental order management module -> Inquiries. Apply filters relevant for the user story, for example to validate Sub rental order lines which are expected to be returned next week (see below).

Please note that 'Refresh data' must be applied to get the right results. All non-data filters allow multiple selections. Buttons on top can give user more detailed information in the required area.

The screenshot displays the 'Sub rental management' interface. At the top, there are navigation tabs: 'Save', 'Sub rental order', 'Rental order', 'Business objects', 'Refresh data', 'Amendments', and 'Options'. Below this is a 'Standard view' dropdown and the title 'Sub rental management'. There are two dropdown menus for 'Rental type' (set to 'AWPE12M') and 'Serial number'. The main area is divided into two sections: 'SUB RENTAL' and 'RENTAL'. Each section has a 'FILTERS' dropdown set to 'Delivered' and a table of filters. The 'SUB RENTAL' table has columns for 'Sub rental sub status', 'Start', 'EXPECTED OFF-RENT', and 'OFF-RENT'. The 'RENTAL' table has columns for 'Rental sub status', 'Start', 'EXPECTED OFF-RENT', and 'OFF-RENT'. Below these is a 'Sub rental line details' table with columns: Rental type, Object number, Serial number, Sub rental order, Vendor account, Line, Sub status, On-rent date/time, Expected off-rent date/time, Off-rent date/time, Back to back, and Delivery address. A single row is shown with values: AWPE12M, DEMF-004730, 012458-0001, 012458, DE-001, 1, Delivered, 1/1/2022 12:00:00 AM, 8/10/2022 5:00:00 PM, and Dordrecht NLD. At the bottom is a 'Rental line details' table with columns: Rental order, Line number, Sub status, On-rent date/time, Expected off-rent date/time, and Off-rent date/time. A single row is shown with values: 065588, 1.0000000000, Delivered, 1/1/2022 12:00:00 AM, 8/10/2022 5:00:00 PM.

## New Maintenance plan type option 'Time and consumption based'

A new maintenance plan type has been added, combining both Time and Consumption capabilities (currently existing in our standard product). With the setting 'Both time and consumption based you can align a time and consumption-based maintenance plan. A consumption-based trigger or a time-based trigger can enforce the same maintenance plan. Both cycles are updated in relation to each other on the same plan.

Please refer to below business scenarios as an exemplification of this functionality:

### Example 1:

Consumption based *On completion*: 200 hours

Time based *On completion*: 14 days

Register 210 hours -> new work order is created, no update on intervals yet.

When work order completed, both next intervals are updated.

Consumption-based will display 410 hours.

Time-based will be completion time + 14 days.

Example 2:

Consumption based *On completion*: 200 hours

Time based *On completion*: 14 days

Time based reached 14 days, creation of new work order, no update on intervals yet.

When work order completed, both next intervals are updated.

Consumption-based will display current reading + 200 hours.

Time-based will be completion time + 14 days.

Example 3:

Consumption based *On due*: 200 hours

Time based *On due*: 14 days

Register 210 hours -> new work order is created, and consumption-based interval is updated. The

Time-based interval is not updated.

Example 4:

Consumption based *On completion*: 200 hours

Time based *On due*: 14 days

Time based reached 14 days, new work order is created and updated with time based next interval, the consumption based remain unchanged.

When the work order is completed, it will update the consumption-based trigger with current values + 200.

## New functional topics considered for this release

### Vendor V3 entity extended with rental fields

Below rental fields have been added to the Vendor V3 entity:

| Target field               | Data source              | Target table name        | Table field                |
|----------------------------|--------------------------|--------------------------|----------------------------|
| DNRBACK2BACKOFFRENTDAYS    | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRBACK2BACKOFFRENTDAYS    |
| DNRBACK2BACKONRENTDAYS     | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRBACK2BACKONRENTDAYS     |
| DNRBACK2BACKOVERRIDE       | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRBACK2BACKOVERRIDE       |
| DNRBACK2BACKRENTALCALEN... | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRBACK2BACKRENTALCALENDAR |
| DNRFISCALUNITID            | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRFISCALUNITID            |
| DNRFISCALUNITID_SYMBOL     | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRFISCALUNITID_SYMBOL     |
| DNRINVOICEPROFILEID        | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRINVOICEPROFILEID        |
| DNRPRICETIMEUNIT           | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRPRICETIMEUNIT           |
| DNRPRICETIMEUNITSYMBOL     | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRPRICETIMEUNITSYMBOL     |
| DNRRENTALCALENDARID        | RetailVendVendorV3Entity | RetailVendVendorV3Entity | DNRRENTALCALENDARID        |

### Performance optimization for Transfer to project from Rental Order

The Transfer to project invoicing is one the invoicing methods of DynaRent allowing to gather all related costs and revenues on one project and then invoice it in one go to the end-customer. In order to do that, the transfer of Rental amounts to a Rental project has to take place. It can be done manually and in batch. For both scenarios performance optimization has been executed to improve user experience and ensure processing of large amounts of data.

## Further performance optimization with Rental line editor (RLE) screen

Several processes were reported slow and have been performance optimized:

- Rental quotation
  - RLE Open from a rental quotation line
  - RLE sub-kit line expansion
  - Creation of the rental quotation lines from RLE
  - Send rental quotation
  - Confirmation of rental quotation
  - Transfer to project from rental quotation
- Rental order
  - Confirmation of rental order
  - Posting of packing slip – for rental items
  - Transfer to project from rental order

New parameters have been introduced during performance optimization exercise

Path – Rental Order Management -> Setup -> Rental Parameters

1. Rental agreements -> Prices -> Skip pricing calculation for optional lines
  - a. When enabled- the rental agreement-based prices will not be calculated for the optional RLE lines
  - b. When disabled (default) – system will calculate prices for all lines on the RLE, resulting into slower opening of the RLE

**Note:** When this parameter is enabled, below changes are applied on RLE (V2):

- The system only calculates prices real-time for the **mandatory** and **recommended** items.
  - The calculation of prices of the **optional** prices happens in an asynchronous mode.
  - A new checkbox field labeled as “Is price calculated” has been added to show the users if the price of the relevant optional item in the RLE has been calculated or not.
  - A new button labeled as “Refresh” has been added on the RLE form to enable the users to refresh the form and check the latest status of the price calculation.
  - The Include button remains disabled for the optional lines until its price calculation checkbox is checked.
2. Finance -> Rental Quotation -> Skip calculating rental amounts during transfer to forecast
    - a. This is being used during the ‘Transfer To Project’ process on the Project Rental Quotation which creates the rental order from the quotation
    - b. When enabled – system will not re-calculate the prices for the resulting rental order lines
    - c. When disabled (default) – system will re-use the prices on the source project quote lines for the resulting rental order lines

3. Finance -> Rental Order -> Skip total journalizing on confirmation
  - a. When enabled – system will generate the pricing details for each confirmation journal line of a rental order
  - b. When disabled (default) – system will not generate the pricing details information for the quotation lines
  - c. The pricing details can be opened from
    - i. Go to - Rental Order Management -> All rental orders
    - ii. Select a confirmed or higher status rental order and open the confirmation journal from Rent -> Journals -> Rental order confirmation
    - iii. Go to lines tab and select a rental type quotation line
    - iv. Click on Financials -> Rental invoice details – this form opens the ‘Rental invoice details’ form which shows the pricing components for the selected quote line.
    - v. The impact of this new parameter- when enabled system will not create the data on the “Rental invoice details” form and it will remain blank

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

In line with DNR usability improvements, an update has been done in August2022DNR release 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 DIF and Excel add-in.

**Note:** Starting from this release it is possible to import several lines for the same resource which can be useful for registration of holiday time for example.

### Discontinued features for this release

No functional topics were discontinued in this release.

### New changes for the upcoming release(s)

Not applicable.

## 3 Fixes summary

### Fixes for this release

| Functional Area         | ID     | Title   |
|-------------------------|--------|---|
| Rental invoicing        | 136413 | <p>Possibility to create invoices for already invoiced periods.</p> <ul style="list-style-type: none"> <li>- Return process can start with definition of off-rent date depending on set up. In this case no update to already invoiced periods is expected because only posting of return note is final. At that moment system will validate if more or less than expected has been invoiced to a customer and prepare periods for credit notes, if applicable.</li> <li>- In specific scenarios, where off-rent was changed multiple times the system was preparing periods for credits and allowing to invoice them twice. This has now been resolved.</li> </ul> |
| Rental invoicing        | 145476 | <p>Rental invoice posting.</p> <ul style="list-style-type: none"> <li>- It's now possible to select Customer groups in Rental invoicing set up.</li> </ul>  |
| Rental invoicing        | 147564 | <p>Technical exchange causes imbalance for Invoice profile based on calendar and calendars other than 07.</p> <ul style="list-style-type: none"> <li>- In case of technical exchange the system makes sure that original monthly price is preserved for the month where exchange has been made. This is now possible for any rental calendar.</li> </ul>  |
| Rental invoicing        | 145915 | <p>Incorrect monthly invoice calculation in case Invoice point is specific date of the month.</p> <ul style="list-style-type: none"> <li>- Equal monthly invoicing was not giving correct results in case if invoicing date was different than the 1<sup>st</sup> of the month (the most used user scenario). This has now been resolved.</li> </ul>  |
| Rental invoice proposal | 144720 | <p>Invoice proposal - Changing expiration date gives error on Tax group and tax-exempt number.</p> <ul style="list-style-type: none"> <li>- It is now possible to change expiration date on a Rental invoice proposal.</li> </ul>   |
| Project invoicing       | 146287 | <p>Project Invoice proposal: not calculated gross/net amounts in the Rental invoice details.</p> <ul style="list-style-type: none"> <li>- Rental invoice details on a Project invoice proposal show and store full invoicing information.</li> </ul>  |
| Project invoicing       | 146105 | <p>No data was loaded in FINWorkCalendar for calendar when the rental period is presented in the calendar.</p> <ul style="list-style-type: none"> <li>- In case if multiple Rental orders are connected to one project and a user confirms on of them system was reconfirming all related Rental orders. This is now restricted to one with significant performance gain.</li> </ul>  |
| Intercompany rental     | 145894 | <p>STD F&amp;O charges on an Intercompany SRO are not updated with invoice information and therefore cannot be invoiced.</p> <ul style="list-style-type: none"> <li>- It is possible now to invoice charges on Intercompany Rental and Sub rental orders.</li> </ul>  |
| Rental Credit Wizard    | 143495 | <p>Rental credit wizard, rental stop - One day credit option not working (ER) - Time zone GMT related.</p>  |

|                           |        |  |
|---------------------------|--------|--|
|                           |        | - Usability of one day credit in case of beginning of end of invoiced period has been improved and accompanied with clear error messages.  |
| Analytical date           | 146724 | Analytical date causing unbalancing posting voucher when customers' currency is different for Transfer to project.<br>- Analytical date functionality in relation to Transfer to project invoicing supports multi-currency from now on.  |
| Analytical date           | 149133 | Analytical date - Posting error when customer advance is settled.<br>- Analytical date functionality in relation to Transfer to project invoicing supports customer advance functionality from now on.   |
| Rental totals             | 147346 | Rental totals don't display information for original line in case technical exchange.<br>- Rental totals display full information in case of exchange.   |
| Transport invoicing       | 138857 | The unit price and net amount are calculated wrongly for the transport items in case the distance is defined on the work location.<br>- It is now possible to define the price of transportation based on the distance to a work location.   |
| Transport invoicing       | 147345 | Changes of the Work location doesn't update/recalculate the transport lines (quantity) on the Rental order, Quotation.<br>- It is now possible to not only to define the price of transportation based on the distance to a work location, but also recalculate it in case if work location is updated before Rental order is delivered.     |
| Inventory journals        | 145580 | Positive adjustments inventory for counting journal - wrong cost calculated.<br>- Inventory journals applied for released products without Rental set up are updated with cost price as specified on the item master.  |
| Rental orders             | 141450 | Due to a new flighting feature that Microsoft has introduced in 10.0.23, using the reduce quantity functionality on the Packing slip posting screen was leading to blocking issues when the rental order contains any lines of type Rental or SubRental. This has now been solved.   |
| Rental transfer orders    | 142275 | Compensating transactions are not getting removed<br>-Compensating transactions are not getting removed when related transfer order line is deleted. This has now been solved.   |
| Project rental quotations | 144640 | Assign on Project rental quote, Inventory transactions originator not updated with the right product<br>-The correctly updated ItemId is now shown on the InventTransOrigin when assigning a different item on the rental quote.   |
| Business objects          | 145910 | Logs are not displaying records related to the BO<br>-References of the logs on BOV2 form are not filtered on selected BO. This has now been solved.   |
| Rental orders             | 146069 | Location is not showing on Return quality inspection<br>-When opening the return quality inspection form and there are lines for items with storage dimension group where location is mandatory and the default locations are filled (warehouse items), the field location must show the default receipt location. This has now been solved. |
| Rental orders             | 146338 | Fields "Amount" and "Current net price"" becomes 0 when Requested ship date is changed   |



|               |        |  |
|---------------|--------|--|
|               |        | - Changing in RO Header Requested ship date and Requested receipt date should not change Amount (RO Line) and Current net price (RO Line Details) to 0.00. This has now been solved. |
| Rental orders | 146532 | Rental return note id Transaction date (Line Qty) not populated correctly in the Transaction dates form. This has now been solved.   |

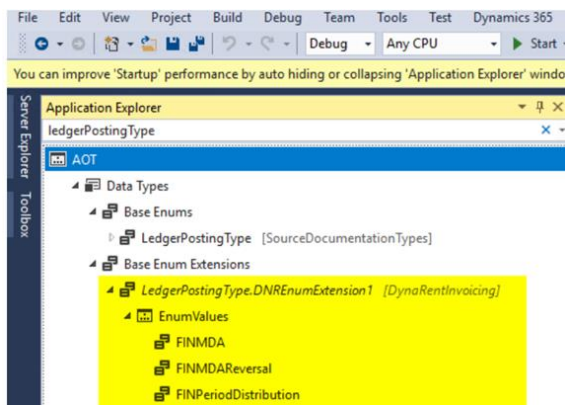
# 4 Known Issues

## Known issues for the release

### General

Unfortunately, it was recently discovered that 10.0.26 release of Microsoft introduces a conflict in number of allowed values in LedgerPostingType (Base Enum). As DynaRent provides 3 additional Posting types on top 254 proposed options in 10.0.26 release onwards, it results in a potential conflict effecting General Ledger transactions, Financial reporting tool and other related functionalities.

Microsoft is currently investigating these conflicts on individual basis for each customer with a support ticket. Therefore, please proceed with a registration in case of questions or discovered issues. Microsoft case of To-Increase number 2207210050002256 can be provided for reference.



# 5 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.

# 6 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.

# 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.

## 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.*