



Process

Documentation

Department:

Customer Support

Last Updated:

10/28/2025 10:10 AM

NAME OF PROCESS

How Invoice Dates Are Calculated in Rental Man

Use Case / Objectives

This article will walk you through the process of viewing the details for the Due Date Reason codes configured in your system.

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

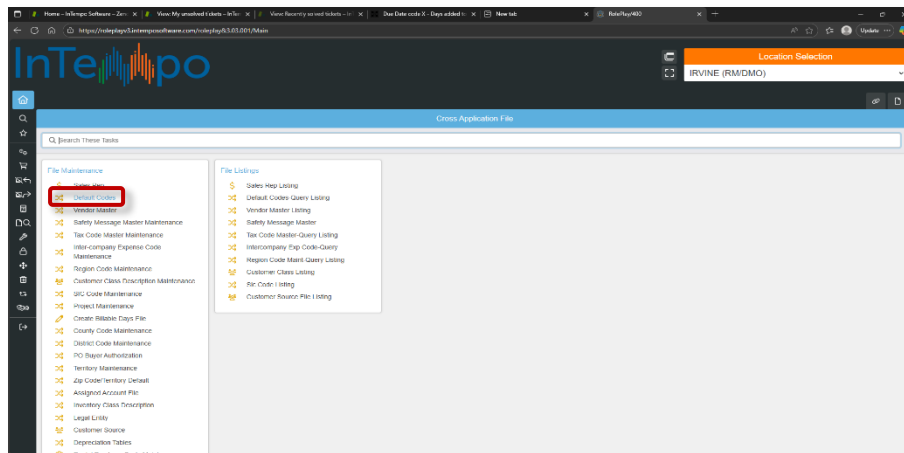
Menu options to access:

Cross Application File => File Maintenance => Default Codes

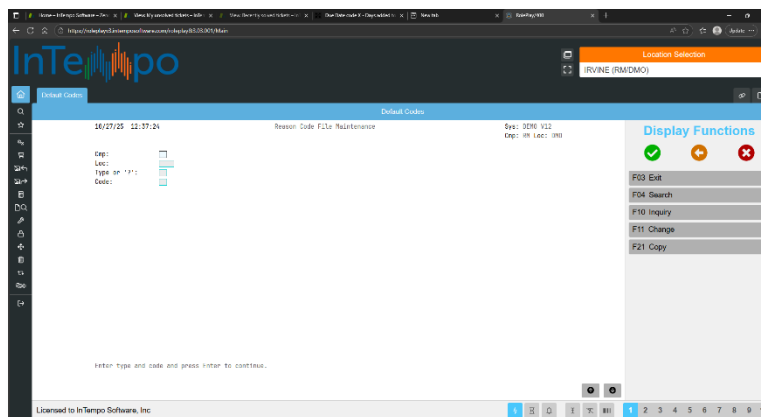
How Invoice Dates Are Calculated in Rental Man

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. The menu you will select from the left toolbar is the **Cross Application File**.
3. Within the **File Maintenance** section, click on the Default Codes option.

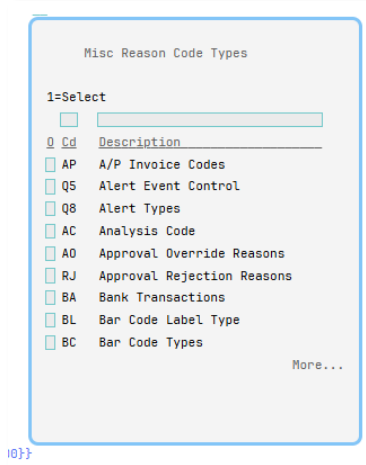


- a. The **Reason Code Maintenance - Launch** screen will open to allow viewing and creating default codes



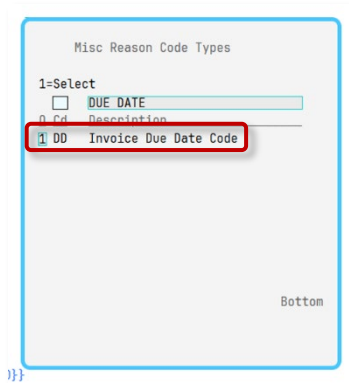
Note: The various codes can be created for a specific *Company* as well as *Location* or simply set up for all by only entering the *Type* and then the *Code*.

4. To find the **Reason Code Type** press F4 to search.
 - a. The **Misc Reason Code Types** pop-up will open, displaying available reason codes in the system.

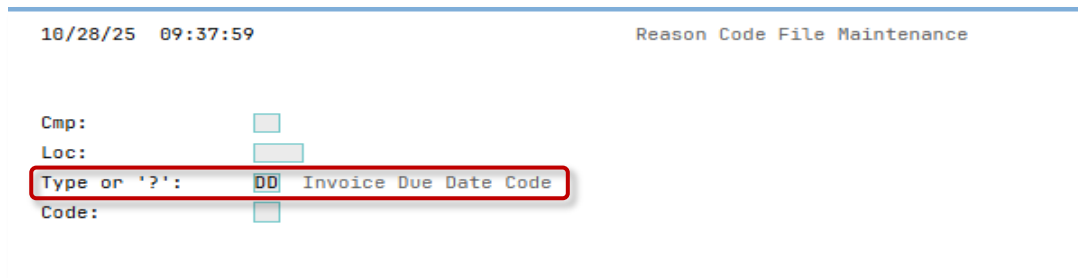


Note: You can use the filter fields at the top to condense the list.

- Once you find the desired code, type 1 in the 0 field next to the option and press Enter. Since we are working with Invoice Due Date Calculations, select the **Invoice Due Date Code** option.

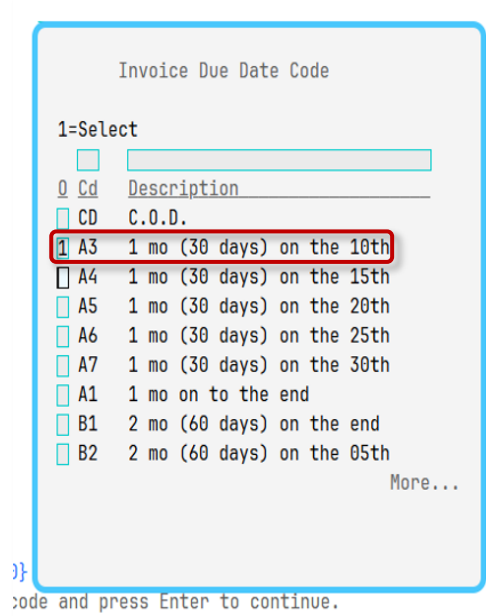


- The **Misc Reason Code Types** pop-up closes and the selected reason code displays in the *Type* field.

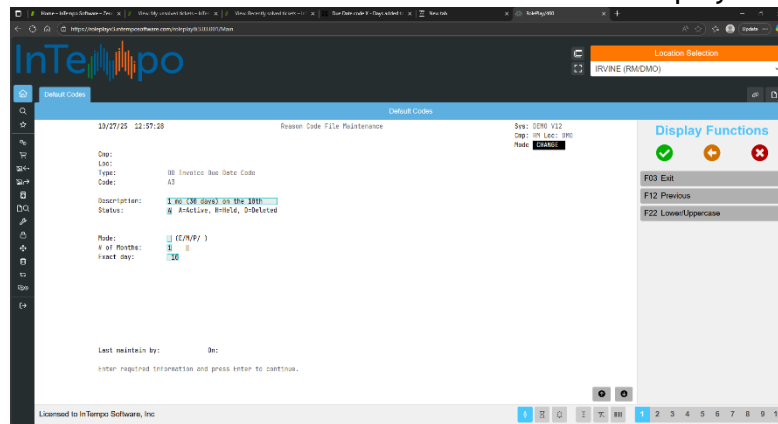


- Once the **Reason Code Type** appears the *Code* will need to be selected or added. Press F4 to search or press F6 to add new code. **NOTE:** If you need to add a new *Code* and F6 is not available, contact customer support.

7. In this example I am selecting an existing option by pressing F4 to open the **Invoice Due Date Code** pop-up window which shows all defined codes currently in the system.



8. To select the desired code, type 1 in the **O** field next to the option and press Enter.
 - a. The **Invoice Due Date Code** pop-up window closes, the selected code displays in the **Code** field and the details for the selected code display.

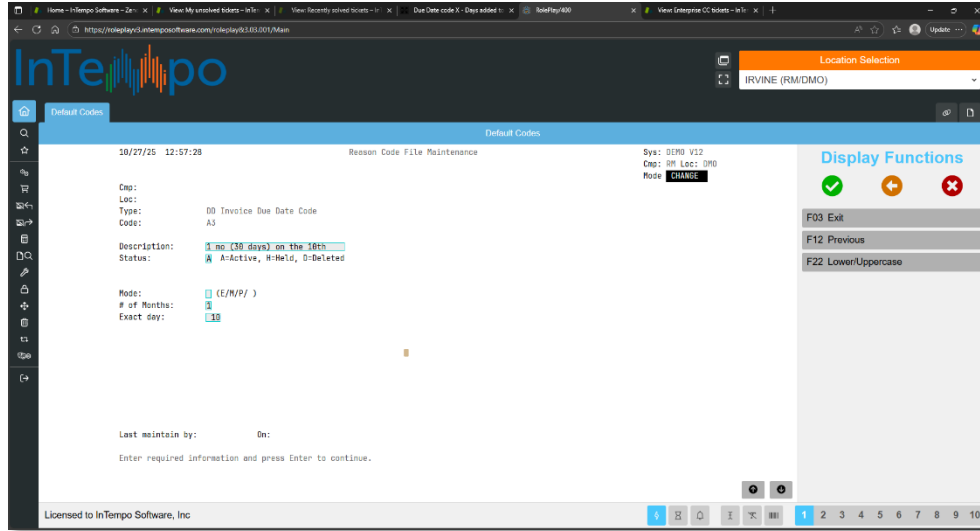


Note: The **Mode** In this case will be blank as this code does not depend on **E/M/P** (which means equipment/merchandise/parts).

9. The **Description** field will give you the information needed for the other fields you need to address (**# of months**, **exact day**).

For this example:

- a. The number of months = 1 as days listed = 30 days
- b. The exact day = 10 as the billing date is the 10th of the month



Note: This functionality is used in invoicing and several reports, as well as various **Accounts Receivable** processes. It also calculates and returns a due date based on the code passed into the function.

Reference Glossary

Field Definitions for Tasks

Reason Code Maintenance - Launch

- **Company** - Enter the code for the company for which you want to maintain or set up a miscellaneous reason code. If you leave this field blank, you must leave the Location field blank as well. Leaving both fields blank indicates that the code settings apply to all of your companies and locations.
- **Location** - Enter the code for the location for which you want to maintain or set up a miscellaneous reason code. If you leave the Company field blank, you must also leave this field blank. Leaving both fields blank indicates that the code settings apply to all of your companies and locations.
- **Type** - Enter the two-character code that represents the type of miscellaneous reason code you want to maintain or set up. If you do not know the code, press F4 to search for it. The type code dictates the fields that display for setting up the code.
- **Code** - Enter the two-character miscellaneous reason code you want to maintain or set up. If you do not know the code, press F4 to search for it.