SALES STUDIO CONFIGURATION

EDIT A PAYMENT FACTOR

Quotes created in Sales Studio can have one or more payment options based on ***Payment Factors*** that have been created.

These Payment Factors are used to calculate monthly ***repayments*** for the quote payment options.

When printing, each Payment Option will print on a new page, as if it were a separate quote, allowing the customer to choose the option they wish to accept.

Each payment option has a ***default*** Payment Factor.

Adding an item to a quote also adds item price options for each quote Payment Option and if *more* options are added corresponding item price options are automatically added based on the Payment Option's default Payment Factor.

Follow the process set out below to **edit** a Payment Factor.

Version Compatibility

- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: *Sales Studio > Configuration > Payment Factors*

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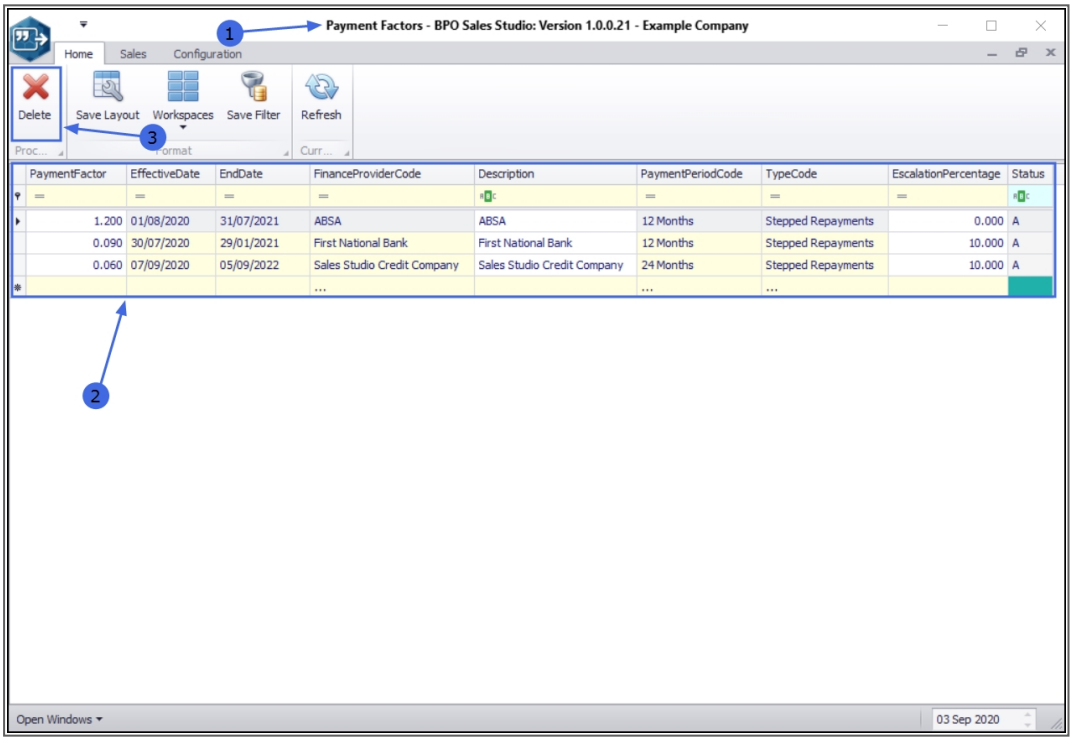
THE PAYMENT FACTORS LISTING SCREEN

1. The ***Payment Factors*** listing screen will open.
2. This screen contains a data grid of all the Payment Factors currently set up on the system.
3. There is only **1** Processing button in this screen: **Delete**, which will be covered in the Delete Payment Factors manual.



GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:

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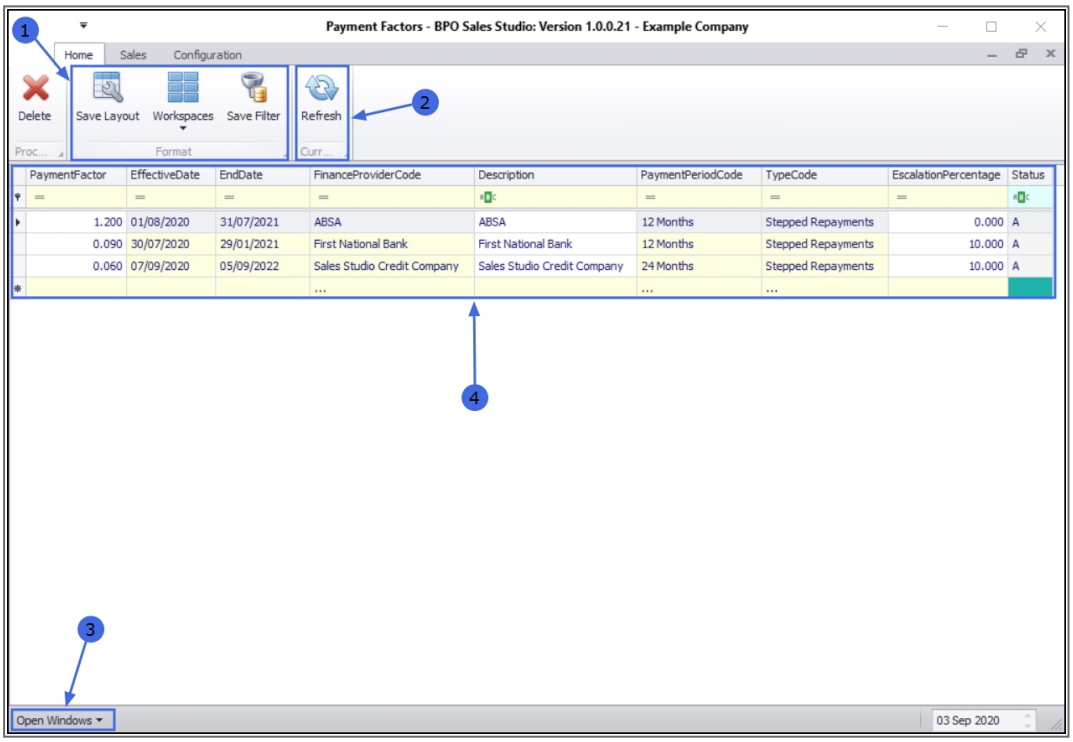
1. **Format**:
    - Save Layout
    - Workspaces
    - Save Filter
2. **Current**:
    - Refresh: Clicking on this button will update the currently displayed page.
3. **Open Windows**:
    - Open Windows
4. **Data Grids**:
    - Refer to Using BPO Data Grids and Data Grid Filtering for further information regarding data grid functionality that can be utilised here.



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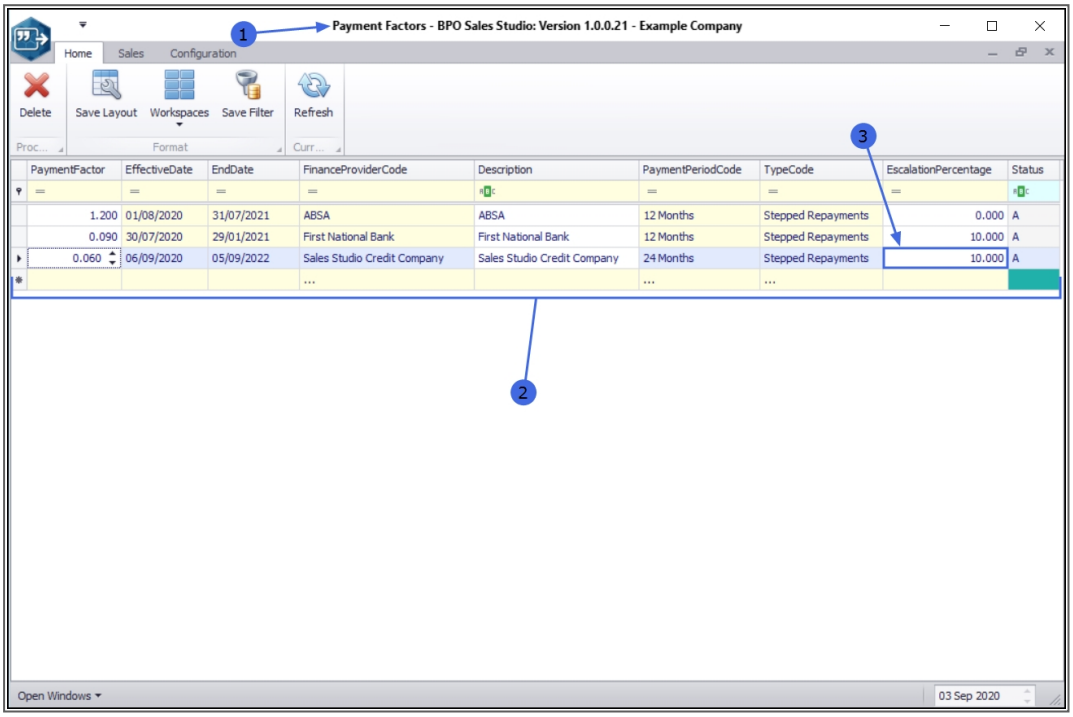
SELECT THE PAYMENT FACTOR TO BE EDITED

1. In the ***Payment Factors*** listing screen,
2. Select the ***field*** in the data grid that you wish to edit.
3. In this example, the ***Escalation Percentage*** is selected.



PaymentFactor	EffectiveDate	EndDate	FinanceProviderCode	Description	PaymentPeriodCode	TypeCode	EscalationPercentage	Status
1.200	01/08/2020	31/07/2021	ABSA	ABSA	12 Months	Stepped Repayments	0.000	A
0.090	30/07/2020	29/01/2021	First National Bank	First National Bank	12 Months	Stepped Repayments	10.000	A
0.060	06/09/2020	05/09/2022	Sales Studio Credit Company	Sales Studio Credit Company	24 Months	Stepped Repayments	10.000	A

EDIT THE SELECTED PAYMENT FACTOR

1. Either ***type in*** or,
2. Use the directional ***arrows*** to edit the Percentage amount, as required.
3. Some fields may necessitate selection from a drop-down ***list,*** in order to edit them. In this example, the ***Finance Provider Code*** field has been selected.

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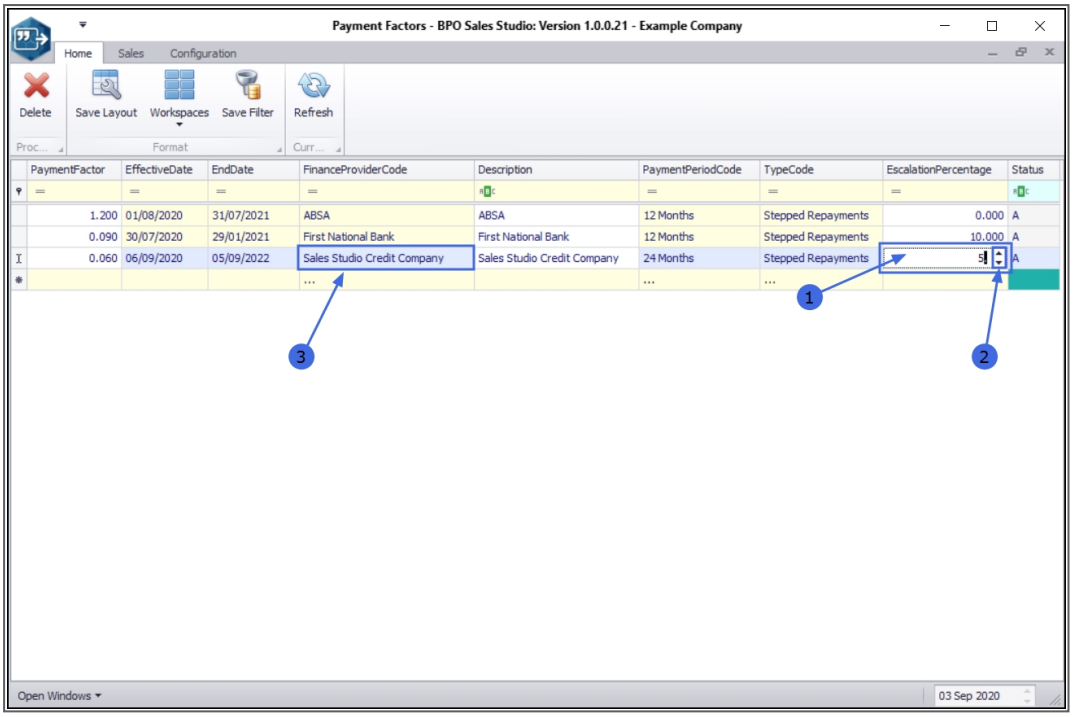
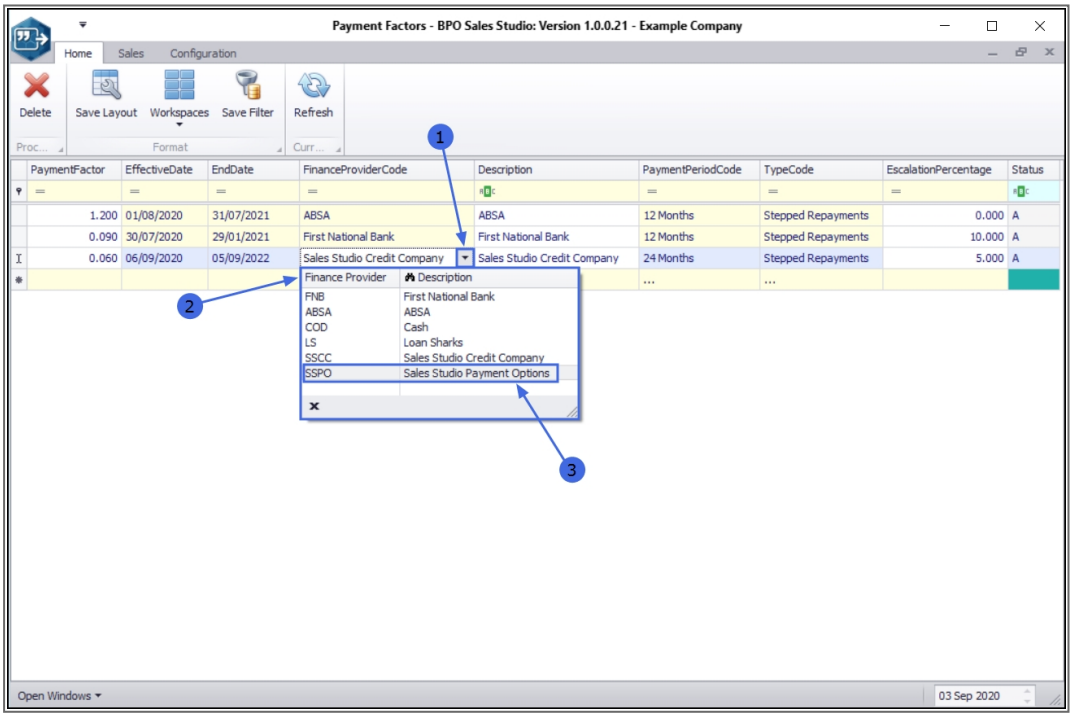


1. A drop-down ***arrow*** will appear. Click on the arrow to display
2. the Finance Provider Code drop-down ***list***.
3. Select from this list, an alternative code.



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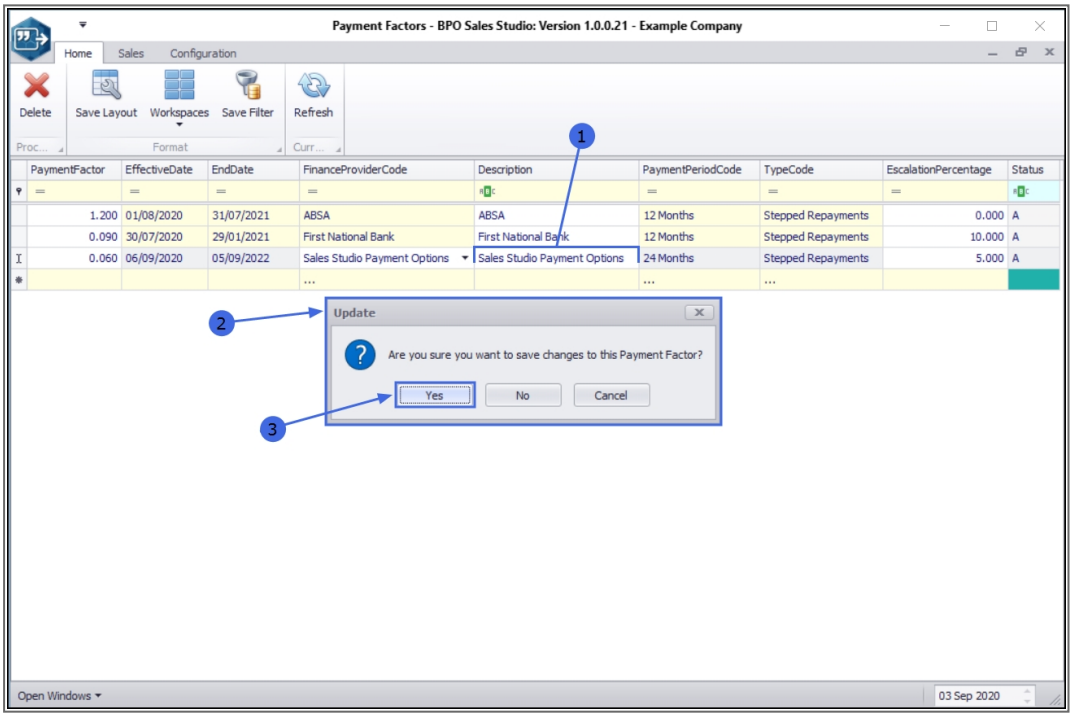
1. In this example, the ***Description*** field will auto update to match the edited Code.

SAVE THE EDITED PAYMENT FACTOR WHEN YOU HAVE FINISHED EDITING THE PAYMENT FACTOR DETAILS, EITHER PRESS *TAB* OR *ENTER* ON YOUR KEYBOARD OR *CLICK OUTSIDE* OF THE DATA GRID.

2. An ***Update*** message box will pop up, asking;
    - ***Are you sure you want to save changes to this Payment Factor?***
3. Click on ***Yes***.



1. The edited details will be ***saved***.
2. ***Exit*** the screen when you are done.

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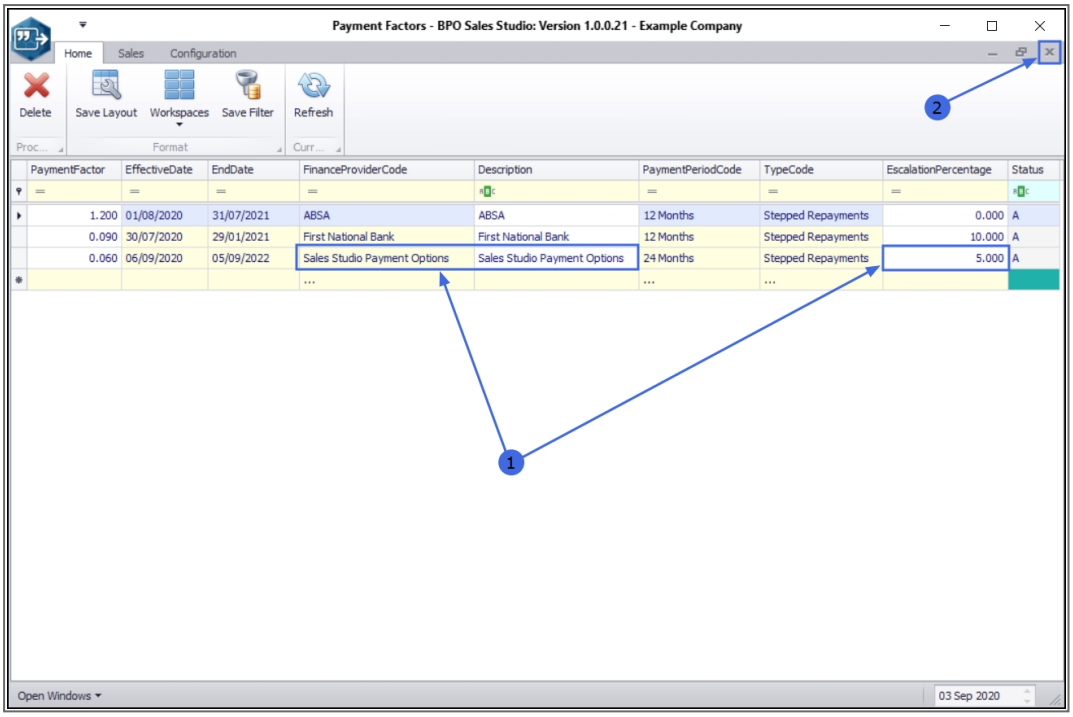

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