

We are currently updating our site; thank you for your patience.

STATIC DATA

STATIC DATA - SALES: FINANCE PROVIDER

In the case of BPO, a Finance Provider will supply funds for business activities, such as making purchases for goods and services. These financial institutions, such as banks, will lend capital to your customers to help purchase your products (possibly out of their immediate reach). There will be an agreement to pay back the loan to these Providers, with interest, in a certain period of time.

Ribbon Access: Configurator > Static Data > Static Data



FIND THE FINANCE PROVIDER ROW

- 1. The **Static Data** listing screen will be displayed.
- 2. Use the filter row or scroll down the list until you find
- 3. the Sales: Finance Provider row.
- 4. Click on the **expand** icon in this row.



Home Accounts Call Centre Company Contract Workspaces Save Filter Format Curr Description TableA Curr Description TableA Curr	t Departments Huma Name SQuotesDetails SQuotesDetails SQuotes SQuotes SQuotes RIC RIC SCustomers	FieldName FieldName fidQuoteDetaiType fidQuoteTermsCode fidQuoteStatus fidQuoteLotiType fidQuoteLotiType fidQuoteCostType fidQuoteCostType fidBerviceClass fidServiceType fidUnitOMeasure fidCreditTerms	ParentFieldName	Size	UserDefinable UserDefinable UserZefinable UserZefinable Ves Yes Yes Yes Yes Yes Yes Yes Yes Yes Y	a _ 67 ×
ave Layout Workspaces Save Filter Refresh Format Curr	Name SQuotesDetails SQuoteConfig SQuotes SQuotes SQuotes RIC RIC RIC SCustomers	FieldName	ParentFieldName	Size	UserDefinable IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	2
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B Sales : Quote detail types biSAL: Sales : Quote payment terms biSAL: Sales : Quote Status Sales : Quote Other Costs Sales : Quote Other Costs Sales : Service Class Sales : Service Type Sales : Credit Terms biSAL: Sales : Payment Factor Periods tbiSAL: Sales : Quote note types tbiSAL Sales : Quote note types biSAL Sales : Quote note types biSAL Sales : Quote note types biSAL	.SQuotesDetails .SQuoteS .SQuotes .SQuotes SQuotes RIC RIC RIC .SCustomers	fidQuoteDetaiType fidQuoteTermsCode fidQuoteStatus fidQuoteUniType fidQuoteLostType fidServiceClass fidServiceType fidUnitofMeasure fidCreditTerms		50 10 50 50 50 50 50 50 50 50	Yes Yes Yes Yes Yes Yes Yes	2
B Sales : Quote payment terms blSAL: Sales : Quote Status Sales : Quote Status Sales : Quote Status Sales : Quote Other Costs Sales : Service Class Sales : Service Class Sales : Service Unit of Measure Sales : Payment Factor Periods tolSAL: Sales : Quote note types tolSAL: Sales: Quote note types	SQuoteConfig SQuotes SQuotesDetails SQuotes RIC RIC RIC SQUOTES SQUOTES	fdQuoteTermsCode fdQuoteStatus fdQuoteUnitType fdQuoteCostType fdServiceClass fdServiceType fdUnitofWeasure fdUritofWeasure fdCreditTerms		10 50 50 50 50 50 50 50	Yes Yes Yes Yes Yes Yes Yes	2
Sales : Quote Status Sales : Quote Status Sales : Quote Unit Types Sales : Quote Unit Types Sales : Service Other Costs Sales : Service Class Sales : Service Unit of Measure Sales : Payment Factor Periods Sales: Payment Factor Periods Sales: Quote note types Sales: Quote note type Sales: Quote	SQuotes SQuotesDetails SQuotes RIC RIC RIC SCustomers	fdQuoteStatus fdQuoteUnitType fdQuoteCostType fdServiceClass fdServiceType fdUnitofMeasure fdCreditTerms		50 50 50 50 50 50 50	Yes Yes Yes Yes Yes	2
B Sales : Quote Unit Types Sales : Quote Other Costs Sales : Quotes Other Costs Sales : Service Class GENER Sales : Service Class GENER Sales : Service Unit of Measure Sales : France Provider Sales : France Provider Sales : Payment Factor Periods Sales : Payment Type (STEPPED/FLAT) Sales: Quote note types Sales: Quote note type Sales: Quote note ty	.SQuotesDetails .SQuotes RIC RIC RIC .SCustomers	fldQuoteUnitType fldQuoteCostType fldServiceClass fldServiceType fldUnitofMeasure fldCreditTerms		50 50 50 50 50 50	Yes Yes Yes Yes	2
Sales : Quotes Other Costs Sales : Quotes Other Costs Sales : Service Class GENER Sales : Service Unit of Measure Sales : Credit Terms Sales : Credit Terms Sales : Credit Terms Sales : Payment Factor Periods Sales : Payment Factor Periods Sales : Payment Type (STEPPE)/FLAT) Sales: Quote note types Sales : Quote note types Sales Sales : Quote note types Sales	.SQuotes RIC RIC RIC .SCustomers	fldQuoteCostType fldServiceClass fldServiceType fldUnitofMeasure fldCreditTerms		50 50 50 50	Yes Yes Yes	2
B Sales : Service Class GENER Sales : Service Type GENER Sales : Service Unit of Measure Sales : Credit Terms Sales: Credit Terms Sales: Payment Factor Periods Sales: Payment Type (STEPPED/FLAT) Sales: Quote note types Sales: Quote note	RIC RIC RIC .SCustomers	fldServiceClass fldServiceType fldUnitofMeasure fldCreditTerms		50 50 50	Yes Yes Yes	Ţ
Sales : Service Type GENER Sales : Service Unit of Measure Sales : Credit Terms biSAL Sales: Credit Terms biSAL Sales: Payment Factor Periods Sales: Payment Type (STEPPED/FLAT) biSAL Sales: Quote note types biSAL	RIC RIC .SCustomers	fldServiceType fldUnitofMeasure fldCreditTerms		50 50	Yes Yes	
B Sales : Service Unit of Measure GENER Sales: Credit Terms tbiSAL Sales: Credit Terms tbiSAL Sales: Payment Factor Periods tbiSAL Sales: Payment Type (STEPPED/FLAT) tbiSAL Sales: Quote note types tbiSTU Sales: Quote note types tbiSAL	RIC .SCustomers	fldUnitofMeasure fldCreditTerms		50	Yes	· · · · ·
B Sales: Credit Terms tbSAL: Sales: France Provider blSAL: Sales: Payment Factor Periods blSAL: Sales: Payment Factor Periods Sales: Quote note types blSAL:	SCustomers	fldCreditTerms				
B Sales: Finance Provider tblSAL Sales: Payment Factor Periods tblSAL B Sales: Payment Type (STEPPED/FLAT) tblSAL B Sales: Quote note types tblSAL B Stock Adjustments : Reason Code tblINW				20	Yes	
Sales: Payment Factor Periods tblSAL B Sales: Payment Type (STEPPED/FLAT) tblSAL B Sales: Quote note types tblSTU 3 Sales: Quote note types tblSAL B Sales: Quote note types tblSAL B Sales: Quote note types tblSAL B Stock Adjustments: Reason Code tblINN	SPaymentFactors	fldFinanceProviderCode		40	Yes	
B Sales: Payment Type (STEPPED/FLAT) tblSAL: B Sales: Quote note types tblSTU 3 Sales: Quote note types tblSAL: B Stock Adjustments: Reason Code tblINVI	SPaymentFactors	fldPaymentPeriodCode		40	Yes	
Sales: Quote note types tblSTU Sales: Quote note types tblSAL B Stock Adjustments : Reason Code tblNVD	SPaymentFactors	fldTypeCode		40	No	
3 Sales: Quote note types tblSAL: B Stock Adjustments: Reason Code tblINV	JDQuoteNotes	fldQuoteNoteType		20	No	
Stock Adjustments : Reason Code tblINVI Tark Day Of Wark	SQuoteNotes	fldQuoteNoteType		20	No	1
T Task Day Of Mask History	NAdjustmentRequest	fldReasonCode		10	Yes	1
DIASK: Day OF Week DIASM	MNTaskSchedule	fldDayOfWeek		10	No	
Task: Week Of Month tblASM	MNTaskSchedule	fldWeekOfMonth		10	No	
TechConnect: General Settings GENER	RIC	fldTECHSettings		40	Yes	
Warranties : Warranty Type tblWAF	RRWarranty	fldType		10	Yes	
Work Orders : Class tblWKC	ORWorkOrder	fldWOClass		50	Yes	
Work Orders : Rectification Codes tbl/WKG	ORWorkSchedule	fldRectificationCode		10	Yes	
Work Orders : Type tblWKG	ORWorkOrder	fldWOType		50	Yes	
Work Orders: Work Order Status tbl₩K0	ORWorkOrder	fldStatus		1	No	
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- 1. The Sales Finance Provider **Codes** frame will be expanded.
- 2. In this example, there are currently <u>5</u> Finance Provider codes set up on the system.



	Static Data - BPO Cor	figurator : Version 2.2.0.0) - Example Compa	any		_ – ×
Home Accounts Call Centre Com	pany Contract Departments Hum	an Resources Inventory	Reporting Sales S	cheduling Security	Services Static Data	_ & ×
Save Layout Workspaces Save Filter Refre	esh					
Farmat						A
Description	TableName	FieldName	ParentFieldName	Size	LicerDefinable	~~
9 REC	RDC	REC REC	alle	=	A C	*
Sales - Quote Unit Types	thISAI SQuotesDetails	fdQuotel InitType	-	50	Vec	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType		50	Yes	
Sales : Service Class	GENERIC	fldServiceClass		50	Yes	
Sales : Service Type	GENERIC	fldServiceType		50	Yes	
Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure		50	Yes	
	tblSALSCustomers	fldCreditTerms		20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes	
Codes						
Code	CodeDescription		CodeType	SortOrder Status		
ENB END	First National Bank		None	0 A		
SSPO	Sales Studio Payment Options		None	1 A		
ABSA	ABSA		None	1 A		
COD	Cash		None	1 A		
LS	Loan Sharks		None	1 A		
*						
	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes	
	tblSALSPaymentFactors	fldTypeCode		40	No	
Gales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No	0
Gales: Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No	
Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode		10	Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek		10	No	U
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth		10	No	
	GENERIC	fldTECHSettings		40	Yes	-
Open Windows 🔻					0:	3 Sep 2020 📫 🎵

ADD A FINANCE PROVIDER

- 1. Right click anywhere in a row of the Codes data grid.
- 2. A **Process** menu will pop up.
- 3. Click on Add Add New Code.



	Static Data - BPO Con	figurator : Version 2.2.0.0) - Example Compa	any			
Home Accounts Call Centre Company	Contract Departments Hum	an Resources Inventory	Reporting Sales So	cheduling s	Security	Services Static Data	_ & ×
Save Layout Workspaces Save Filter Refresh							
Format							
Description	TableName	FieldName	ParentFieldName	Size		UserDefinable	
P REC	8 0 C	80C	8 C	=		REC	A
Sales : Quote Unit Types	thISAI SQuotesDetails	fdQuotel InitType	-		50	Yes	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType			50	Yes	
Sales : Service Class	GENERIC	fldServiceClass			50	Yes	
	GENERIC	fldServiceType			50	Yes	
	GENERIC	fldUnitofMeasure			50	Yes	
	tblSALSCustomers	fldCreditTerms			20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode			40	Yes	
Codes 2	Description		CodeTurno	ContOrdor	Status	1	
ENB Eiret	Vational Bank		None	ontorder	A	1	
SSPO Sales	Studio Payment Ontions		None	1	Δ		
ABSA	oradio rayment options		None	1	A	1	
COD Process Cash			None	1	A		
LS Add Loan	Sharks		None	1	A		
* Add New Code							
	thic ALCDaumontEactors	fdD_sumantDariadCada			40	Voc	
Sales: Payment Type (STEDDED/ELAT)	this ALSP ayment Eactors	fdTypeCode			40	No	
Sales: Quote note type	thISTUDQuoteNotes	fdQuoteNoteType			20	No	0
El Sales: Quote note types	thISALSOupteNotes	fldQuoteNoteType			20	No	
El Stock Adjustments : Reason Code	tblINVNAdiustmentRequest	fldReasonCode			10	Yes	
	tblASMNTaskSchedule	fldDayOfWeek			10	No	
	tblASMNTaskSchedule	fldWeekOfMonth			10	No	0
	GENERIC	fldTECHSettings			40	Yes	
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							• [6]

- 1. The **final row** in the Codes data grid will now be **'activated'**.
- 2. The Code Type, Sort Order and Status columns will auto populate.



(🔿 🔻	Static Data - BPO Cor	figurator : Version 2.2.0.0) - Example Compa	any			_ – ×
Home Accounts Call Centre Company	Contract Departments Hum	an Resources Inventory	Reporting Sales S	cheduling S	Security	Services Static Dat	a _ & ×
Save Layout Workspaces Save Filter Refresh							
Format Curr							\diamond
Description	TableName	FieldName	ParentFieldName	Size		UserDefinable	
♥ #□c	88c	R C	s 🛛 c	-		8 C	A
	tblSALSQuotesDetails	fldQuoteUnitType			50	Yes	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType			50	Yes	
	GENERIC	fldServiceClass			50	Yes	
	GENERIC	fldServiceType			50	Yes	
☑ Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure			50	Yes	
☑ Sales: Credit Terms	tblSALSCustomers	fldCreditTerms			20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode			40	Yes	
Codes							
Code	Description		CodeType	SortOrder	Status		
FNB 1 First	National Bank		None	0	A		
SSPO Sales	Studio Payment Options		None	1	A		
ABSA ABSA			None	1	A		
COD Cash			None	1	A		
LS	Sharks		None	1	A		
I			None	0	А		
	tblSALSPaymentFactors	fldPaymentPeriodCode			40	Yes	
☑ Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode			40	No	
☑ Sales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType			20	No	0
Sales: Quote note types Sales: Quote note type Sales: Quote note types Sales: Quote note type Sales:	tblSALSQuoteNotes	fldQuoteNoteType		2	20	No	
Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode			10	Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek			10	No	U
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth			10	No	
TechConnect: General Settings ■	GENERIC	fldTECHSettings			40	Yes	*
Open Windows 👻							03 Sep 2020 🗘 ///

- 1. **Code:** Click in this text box and type in a **code** specific for this new Finance Provider.
- 2. **Code Description:** Click in this text box and type in a **description** for this new Finance Provider code.



	Static Data - BPO Cor	figurator : Version 2.2.0.0	- Example Compa	any		_ — X
Home Accounts Call Centre Company	Contract Departments Hum	an Resources Inventory R	Reporting Sales S	cheduling Security	Services Static Data	# ×
Save Layout Workspaces Save Filter Refresh						
Format						
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable	
♥ #0:	RBC	#Bc	RBC	=	8 0 0	
	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType		50	Yes	
	GENERIC	fldServiceClass		50	Yes	
Sales : Service Type	GENERIC	fldServiceType		50	Yes	
☑ Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure		50	Yes	
☑ Sales: Credit Terms	tblSALSCustomers	fldCreditTerms		20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes	
Codes						
Code Code	Description		CodeType S	SortOrder Status		
FNB 1 First I	National Bank	2	None	0 A		
SSPO Sales	Studio Payment Options	Γ	None	1 A		
ABSA ABSA			None	1 A		
COD Cash			None	1 A		
LS Loan	Sharks		None	1 A		
I			None	0 A		
Sales: Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes	
☑ Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No	
☑ Sales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No	0
	tblSALSQuoteNotes	fldQuoteNoteType		20	No	
Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode		10	Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek		10	No	U
	tblASMNTaskSchedule	fldWeekOfMonth		10	No	
TechConnect: General Settings ■	GENERIC	fldTECHSettings		40	Yes	-
Open Windows 🔻)3 Sep 2020 📫 🎵

- 1. Code Type: This can remain as None.
- 2. **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new Finance Provider code.
- 3. **Status:** This will auto populate with **A** Active.



Image: Save Layout Workspaces Save Filter Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Da Save Layout Workspaces Save Filter Refresh Curr Refresh Curr Curr Description TableName PieldName ParentFieldName Size UserDefinable Oc Oc Oc Oc Oc - Oc Oc - -	ta _ & ×
Save Layout Workspaces Save Filter Refresh Format Curr Curr Curr Description TableName PiedName PerentFieldName Size UserDefinable Image: Control of the Costs Option Opt	
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Format Curr Description TableName PieldName ParentFieldName Size UserDefinable ID:	
Description TableName FieldName ParentFieldName Size UserDefinable • ①: • ③: • ④	
Op: Op: Op: Op: Op: Op: Op: ID Sales : Quote Unit Types tblSALSQuotesDetails fidQuoteUnitType 50 Yes ID Sales : Quotes Other Costs tblSALSQuotes fidQuoteCostType 50 Yes ID Sales : Service Class GENERIC fidServiceClass 50 Yes ID Sales : Service Type GENERIC fidServiceType 50 Yes ID Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes ID Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes ID Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes ID Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes ID Sales : Service Unit of Measure tblSALSCustomers fidCreditTerms 20 Yes ID Sales : Finance Provider tblSALSPaymentFactors fidFinanceProviderCode 40 Yes	
Image: Soles : Quote Unit Types bbSALSQuotesDetails fidQuoteUnitType 50 Yes Image: Soles : Quotes Other Costs bbSALSQuotes fidQuoteCostType 50 Yes Image: Soles : Quotes Other Costs bbSALSQuotes fidQuoteCostType 50 Yes Image: Soles : Service Class GENERIC fidServiceClass 50 Yes Image: Soles : Service Type GENERIC fidServiceType 50 Yes Image: Soles : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes Image: Soles : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes Image: Soles : Finance Provider tbISALSQuoteners fidCreditTerms 20 Yes Image: Soles : Finance Provider tbISALSPaymentFactors fidFinanceProviderCode 40 Yes Codes Image: Soles : Finance Provider Soles : Finance ProviderCode 40 Yes	A
Sales : Quotes Other Costs tblSALSQuotes fidQuoteCostType 50 Yes B Sales : Service Class GENERIC fidServiceClass 50 Yes B Sales : Service Type GENERIC fidServiceClass 50 Yes B Sales : Service Unit of Measure GENERIC fidServiceType 50 Yes B Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes B Sales : Credit Terms tblSALSQuoteners fidCreditTerms 20 Yes B Sales : Finance Provider tblSALSPaymentFactors fidFinanceProviderCode 40 Yes	
B Sales : Service Class GENERIC fldServiceClass 50 Yes B Sales : Service Type GENERIC fldServiceType 50 Yes B Sales : Service Unit of Measure GENERIC fldUnitofMeasure 50 Yes B Sales : Credit Terms tblSALSCustomers fldCreditTerms 20 Yes B Sales : Finance Provider tblSALSPaymentFactors fldFinanceProviderCode 40 Yes	
ID Sales : Service Type GENERIC fidServiceType 50 Yes ID Sales : Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes ID Sales : Credit Terms tblSALSCustomers fidCreditTerms 20 Yes ID Sales: Finance Provider tblSALSPaymentFactors fidPinanceProviderCode 40 Yes	
Image: Service Unit of Measure GENERIC fidUnitofMeasure 50 Yes Image: Service Unit of Measure biSALSCustomers fidCreditTerms 20 Yes Image: Service Provider biSALSPaymentFactors fidFinanceProviderCode 40 Yes	
I Sales: Credit Terms tblSALSCustomers fldCreditTerms 20 Yes I Sales: Finance Provider tblSALSPaymentFactors fldFinanceProviderCode 40 Yes	
Sales: Finance Provider tblSALSPaymentFactors fidFinanceProviderCode 40 Yes Codes	
Codes	1
Codes	
Colores Colores Colores	
Code Code Vestigation C	
rive nirst National Bank None U A 3	
Sales Studio Payment Uptions None 1 A	
ADSA ADSA NONE I A	
Loop Lash None I A	
LS Loan sharks with Company log A	
Social States Studio Creat Company India In	
Sales: Payment Factor Periods blSALSPaymentFactors fldPaymentPeriodCode fldPaymentPeriodCode fldPaymentPeriodCode	
Sales: Payment Type (STEPPED/FLAT) tblSALSPaymentFactors fldTypeCode 40 No	
Sales: Quote note types tblSTUDQuoteNotes fldQuoteNoteType 20 No	
Sales: Quote note types tblSALSQuoteNotes fdQuoteNoteType 1 20 No	
Stock Adjustments : Reason Code tblINVNAdjustmentRequest fidReasonCode 10 Yes	
Task: Day Of Week tblASMNTaskSchedule fdDayOfWeek 10 No	U
Task: Week Of Month tblASMNTaskSchedule fldWeekOfMonth 10 No	
⊡ TechConnect: General Settings GENERIC fidTECHSettings 40 Yes ☐	
Open Windows *	

Note on Sort Order:

The sort order is the order in which this new Finance Provider Code will appear in the Finance Provider Codes drop-down list in BPO2. If each Code has the same number e.g. 0 or 1, then the drop-down list will usually default to an alphabetical order in BPO2. If you wish the Finance Providers to be listed in a certain order then number each one, in the order that you wish to view them.

If you wish to change the **change** the Sort Order number:

- 1. Click in this text box and either **type in** the new number
- 2. Or use the **arrow indicators** revealed, to select the sort order number for this new Finance Provider.



	Static Data - BPO Con	figurator : Version 2.2.0.0) - Example Compa	iny			
Home Accounts Call Centre Company	Contract Departments Hum	an Resources Inventory	Reporting Sales So	cheduling !	Security	Services Static Dat	a _ & ×
Save Layout Workspaces Save Filter Refresh							
Format . Curr							
Description	TableName	FieldName	ParentFieldName	Size		UserDefinable	
P 10:	RBC	88c	a B c	=		8 0 0	
Sales : Ouote Unit Types	tblSALSOuotesDetails	fldOuoteUnitType			50	Yes	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType			50	Yes	
☑ Sales : Service Class	GENERIC	fldServiceClass			50	Yes	
Sales : Service Type	GENERIC	fldServiceType			50	Yes	
	GENERIC	fldUnitofMeasure			50	Yes	
E Sales: Credit Terms	tblSALSCustomers	fldCreditTerms			20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode			40	Yes	
Cadaa							
Code	Description		CodeType	CortOrder	Statue		
ENB First	National Bank		None	0	A		
SSPO Sales	Studio Payment Options		None	1	A		
ABSA ABSA				1	A		
COD Cash			None	1	A		
LS Loan	Sharks		None	. 1	A		
I SSCC Sales	Studio Credit Company		None	0 🗘	A		
Sales: Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		4	40	Yes	
☑ Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		1	40	No	
☑ Sales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType			20	No	0
	tblSALSQuoteNotes	fldQuoteNoteType		9	20	No	
	tblINVNAdjustmentRequest	fldReasonCode			10	Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek			10	No	
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth			10	No	
TechConnect: General Settings ■	GENERIC	fldTECHSettings			40	Yes	
Open Windows 🔻							03 Sep 2020 🗘 //.

SAVE FINANCE PROVIDER DETAILS

When you have finished adding the new Finance Provider details, either press **Tab** or **Enter** on your keyboard or **click outside** of the data grid.

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



	Static Data - BPO Co	nfigurator : Version 2.2.0.0 - I	Example Compa	any		
Home Accounts Call Centre Compa	ny Contract Departments Hu	man Resources Inventory Rep	orting Sales So	cheduling Secur	ity Services Static Data	& ×
Save Layout Workspaces Save Filter Refres						
Example Our						
Description	TableName	FieldName	ParentFieldName	Size	UserDefinable	
P #0:	ROC	40c	a E c	=	8 C	*
Sales : Ouote Unit Types			-		50 Yes	
Sales : Ouotes Other Costs	Update		×		50 Yes	
Sales : Service Class					50 Yes	
Sales : Service Type	Are you sure you	want to save changes to this co	de?		50 Yes	
					50 Yes	
					20 Yes	
Sales: Finance Provider	Yes	No Cano	:el		40 Yes	
Codes						
Code	odeDescription		CodeType S	SortOrder Sta	his	
ENB E	irst National Bank		None	0 A		
sspo s	ales Studio Payment Options		None	1 A		
ABSA A	BSA		None	1 A		
COD	ash		None	1 A		
LS	oan Sharks		None	1 A		
* SSCC S	ales Studio Credit Company		None	1 🗘 A		
	tblSALSPaymentFactors	fldPaymentPeriodCode			40 Yes	
	tblSALSPaymentFactors	fldTypeCode			40 No	
E Sales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType			20 No	0
Sales: Quote note types	tblSALSQuoteNotes	fldQuoteNoteType			20 No	
E Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode			10 Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek			10 No	
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth			10 No	
	GENERIC	fldTECHSettings			40 Yes	
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- 1. The new Finance Provider details will be **saved**.
- 2. A **new row** will be added to the **Codes** data grid.



• •	Static Data - BPO Con	figurator : Version 2.2.0.0	- Example Compa	any			_
Home Accounts Call Centre Company	Contract Departments Huma	an Resources Inventory R	Reporting Sales So	cheduling !	Security	Services Static Dat	a _ & ×
Save Layout Workspaces Save Filter Refresh							
Format Ourr							
Description	TableName	FieldName	ParentFieldName	Size		UserDefinable	
P 80c	880	8 0 0	8 0 0	-		*B¢	
	tblSALSQuotesDetails	fldQuoteUnitType			50	Yes	
Sales : Quotes Other Costs	tblSALSQuotes	fldQuoteCostType			50	Yes	
	GENERIC	fldServiceClass			50	Yes	
	GENERIC	fldServiceType			50	Yes	
Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure			50	Yes	
	tblSALSCustomers	fldCreditTerms			20	Yes	
Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode			40	Yes	
Carter							
Code	Description		CodeType	SortOrder	Statue		
ENB First	National Bank		None	0	A		
SSPO	Studio Payment Ontions		None	1	Δ		
ABSA			None	1	A		
COD Cash			None	- 1	A		
LS	Sharks		None	- 1	A		
SSCC Sales	Studio Credit Company		None	1	A	1 4	
•					[-
E Sales: Dayment Eactor Derinde	this AI spaymentEactors	fidDaymentDeriodCode			40	Vec	
Sales: Payment Type (STEPDED/ELAT)	tblSALSPaymentEactors	fidTypeCode			40	No	0
Sales: Ounte note type (STEPPED) EAT)	th/STI IDQuoteNotes	fdOuoteNoteType			20	No	
Sales: Quote note types	thISALSOupteNotes	fdQuoteNoteType			20	No	
Stock Adjustments : Reason Code	thIINVNAdjustmentRequest	fdReasonCode			10	Yes	
Task: Day Of Week	tblASMNTaskSchedule	fldDavOfWeek			10	No	0
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth			10	No	
							· · · · · · · · · · · · · · · · · · ·
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DELETE A FINANCE PROVIDER

- 1. **Select** and **right click** in the row of the Finance Provider that you wish to delete.
- 2. The **Process** menu will pop up.
- 3. Click on **Delete**: Delete Code.



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N.	Home Account	ts Call Centre	Company	Contract Departments Hu	man Resources Inventory	Reporting Sales S	cheduling s	Security	Services Static Da	ta _ & ×
	2	7	Ð							
Sa	e Layout Workspaces	Save Filter	Refresh							
	Format		Curr							
	Description			TableName	FieldName	ParentFieldName	Size		UserDefinable	
ę	0 c			RBC	88c	8 B C	-		8 C	A
E	Sales : Quote Unit Typ	es		tblSALSQuotesDetails	fldQuoteUnitType			50	Yes	
	Sales : Quotes Other	Costs		tblSALSQuotes	fldQuoteCostType			50	Yes	
E	Bales : Service Class			GENERIC	fldServiceClass			50	Yes	
E	Sales : Service Type			GENERIC	fldServiceType			50	Yes	
E	Bales : Service Unit of	Measure		GENERIC	fldUnitofMeasure			50	Yes	
E	Sales: Credit Terms			tblSALSCustomers	fldCreditTerms			20	Yes	
E	3 Sales: Finance Provide	er		tblSALSPaymentFactors	fldFinanceProviderCode			40	Yes	
	Codes									
	Code		Cod	eDescription		CodeType	SortOrder	Status		
	FNB		First	National Bank	2	None	0	A		
	SSPO		Sale	s Studio Payment Options	T	None	1	A		
	ABSA		ABS	A		None	1	A		
	COD		Cas	h	1	None	1	A		
	LS		Loar	n Sharks		None	1	A		
Г	SSCC		Sale	s Studio Credit Company	Process	None	1	A		
*	1				Add Add New Code					
	Sales: Payment Factor	Periods		tblSALSPaymentFactors	Delete			40	Yes	
-	Sales: Payment Type	(STEPPED/FLAT	r)	tblSALSPaymentFactors	Delete Code	3		40	No	0
E	Sales: Quote note typ	es		tblSTUDQuoteNotes	fldQuoteNoteType			20	No	
E	Sales: Quote note typ	es		tblSALSQuoteNotes	fldQuoteNoteType			20	No	
E	Stock Adjustments : R	eason Code		tblINVNAdjustmentRequest	fldReasonCode			10	Yes	
6	Task: Day Of Week			tblASMNTaskSchedule	fldDayOfWeek			10	No	
E	Task: Week Of Month			tblASMNTaskSchedule	fldWeekOfMonth			10	No	-
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- 1. A **Delete Code** message box will pop up asking;
 - Are you sure you want to delete this static data code?
- 2. Click on **Yes**.



	Static Data - BPO Con	figurator : Version 2.2.0.0	Example Comp	any			_ □ ×
Home Accounts Call Centre Con	npany Contract Departments Hum	an Resources Inventory R	eporting Sales S	Scheduling S	Security	Services Static Data	& ×
Save Layout Workspaces Save Filter Refr	esh (
÷							
Format / Curr		and the	e en the				~
Description	I ableName	FieldName	Parent-ieldName	Size		UserDefinable	
	Harrison in a suit	Aller and the	- C	-		- Contraction of the contraction	
LEJ Sales : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType	_		50	Yes	
Sales : Quotes Other Costs	Delete Code		×		50	Yes	
Sales : Service Class			_		50	Yes	
Sales : Service Type		ak ka dalaka khis skakis daka s	de2		50	Yes	
Sales : Service Unit of Measure	Are you sure you want to delete this static data code? 50						
		20					
El Sales: Finance Provider	2	Yes N	0		40	Yes	
Codes							
Code	CodeDescription		CodeType	SortOrder	Status		
FNB	First National Bank		None	0	A		
SSPO	Sales Studio Payment Options		None	1	A		
ABSA	ABSA		None	1	A		
COD	Cash		None	1	A		
LS	Loan Sharks		None	1	A		
SSCC	Sales Studio Credit Company		None	1	Α		
*							
	tblSALSPaymentFactors	fldPaymentPeriodCode			40	Yes	
Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode			40	No	Π
Gales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType			20	No	
Gales: Quote note types	tblSALSQuoteNotes	fldQuoteNoteType			20	No	
E Stock Adjustments : Reason Code	tblINVNAdjustmentRequest	fldReasonCode			10	Yes	U
	tblASMNTaskSchedule	fldDayOfWeek			10	No	
Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth			10	No	-
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- 1. The selected Finance Provider will be **removed** from the data grid.
- 2. When you have finished working in the Codes frame, **collapse** the data grid and
- 3. Close the screen.

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