

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

SALES STUDIO CONFIGURATION

VIEW PAYMENT FACTORS

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 of these payment options will print on a new page, as if each were a separate quote, allowing the customer to choose the option they wish to accept.

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

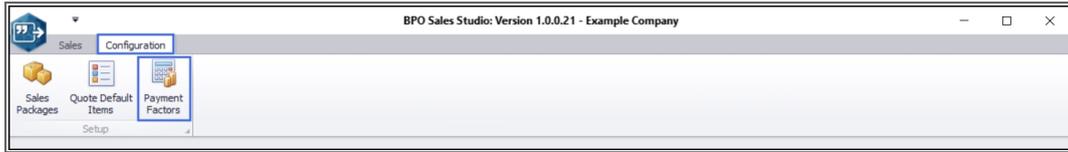
Adding an item to a quote also adds item price options for each quote payment option and if more options are added, corresponding item price options are automatically added, based on the payment option's default **Payment Factor**.

Follow the process set out below to **view** the Payment Factors set up in the system.

Version Compatibility

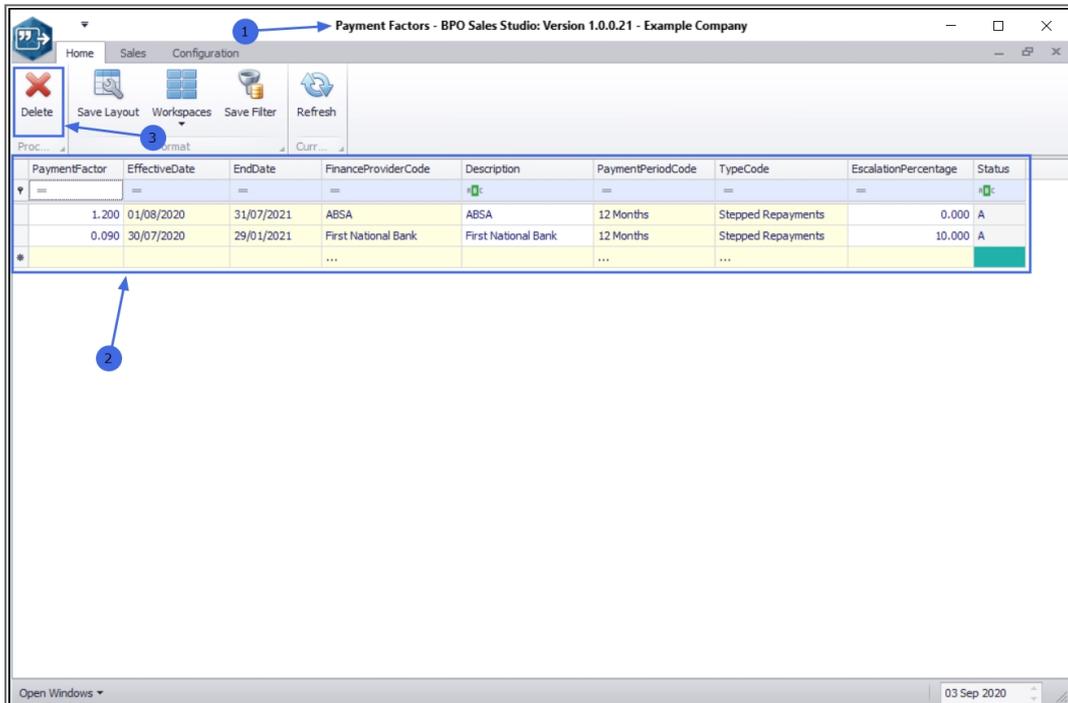
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Payment Factors



PAYMENT FACTORS LISTING SCREEN – INTERFACE

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:

1. Format:

- [Save Layout](#)
- [Workspaces](#)
- [Save Filter](#)

2. Current:

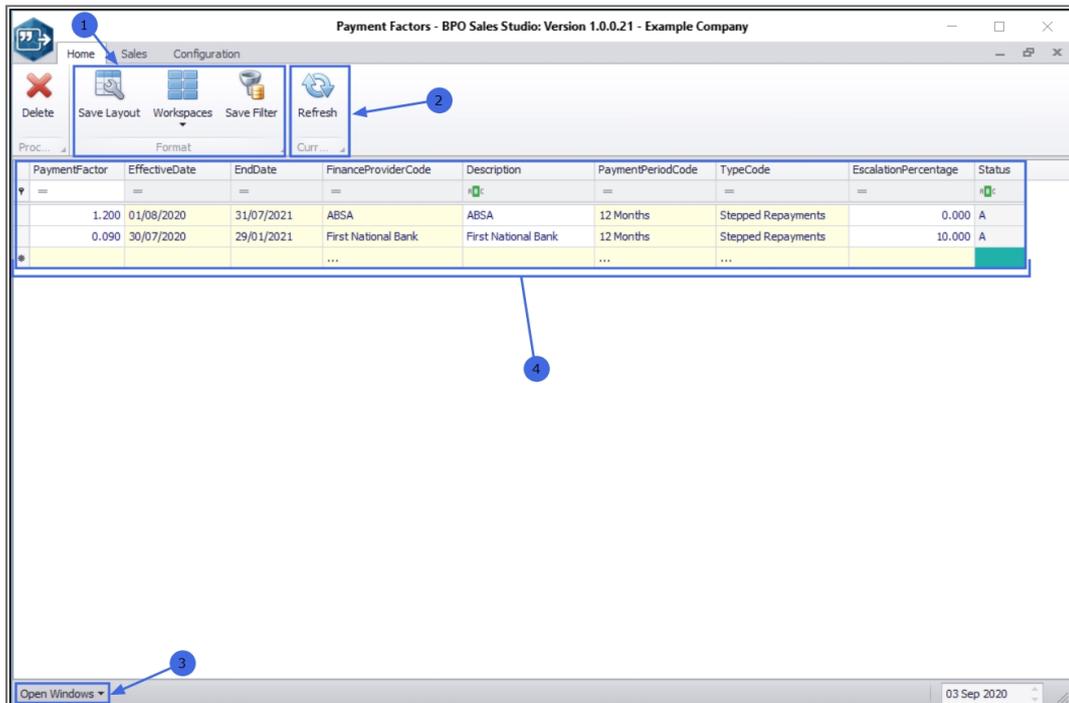
- **Refresh:** Clicking on this button will update the currently displayed page.

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.



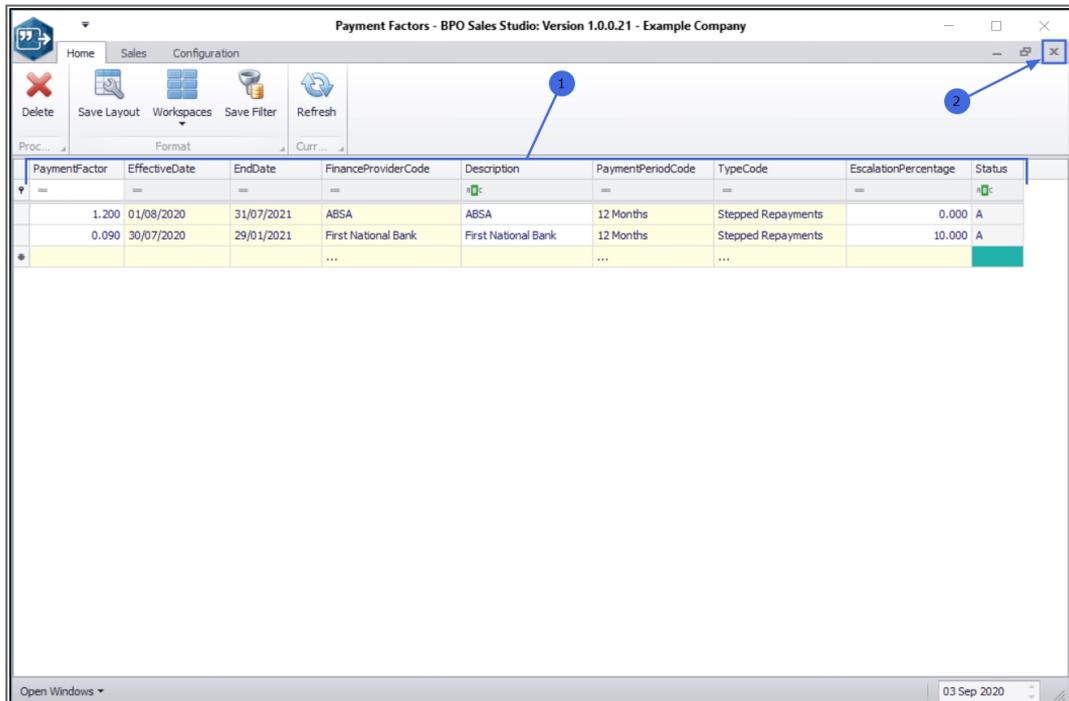
VIEW CURRENT PAYMENT FACTORS

1. The Payment Factor records have the following fields:

- **Payment Factor:** This is the factor used to calculate the monthly repayments.
- **Effective Date:** The date from which the factor applies.
- **End Date:** The date when the factor expires.
- **Finance Provider Code:** [Finance Providers](#) configured in BPO Static Data.
- **Description:** User-friendly description of the Finance Provider Code.
- **Payment Period Code:** [Payment Periods](#) configured in BPO Static Data.
- **Type Code:** [Payment Types](#) configured in BPO Static Data.
- **Escalation Percentage:** The Escalation percentage amount to be applied with the Payment Factor.

EXIT THE PAYMENT FACTORS LISTING SCREEN

2. **Exit** the Payment Factors listing screen when you are done.





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