

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

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.

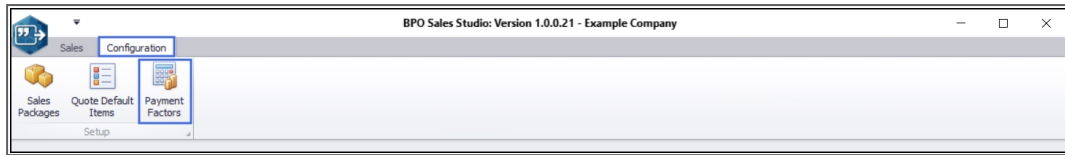
Adding an item to a quote also adds item price options for each quote Payment Option and if more options are added corresponding item price options are automatically added based on the Payment Option's default Payment Factor.

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

Version Compatibility

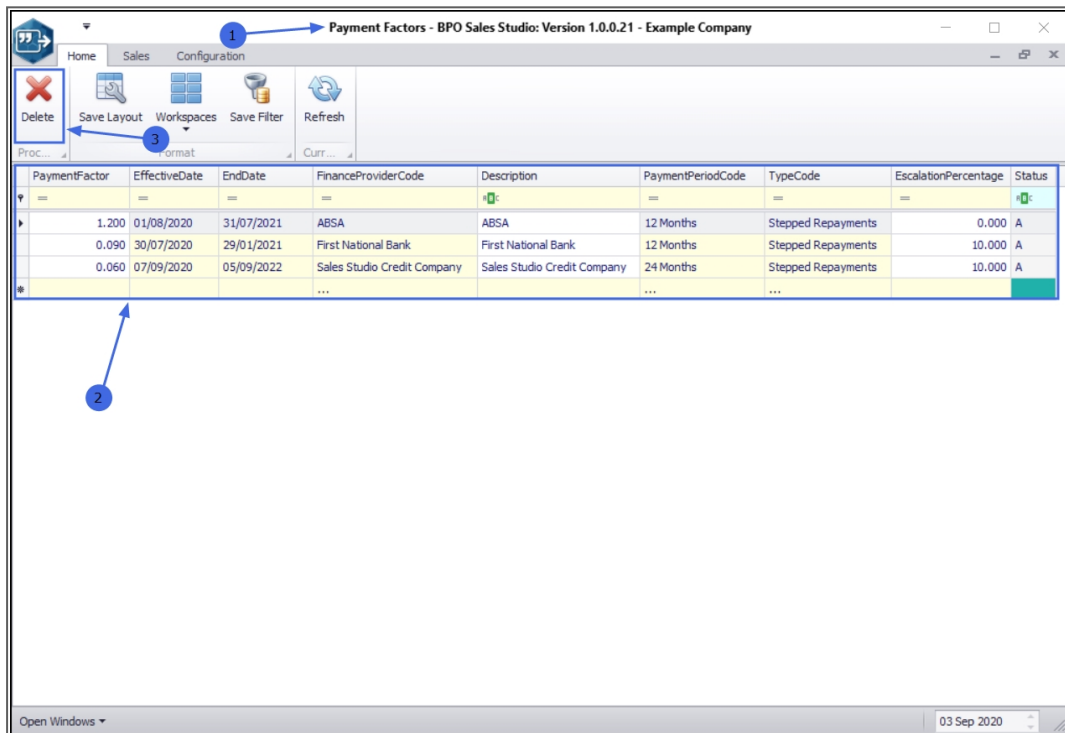
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Payment Factors



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:

1. Format:

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

2. Current:

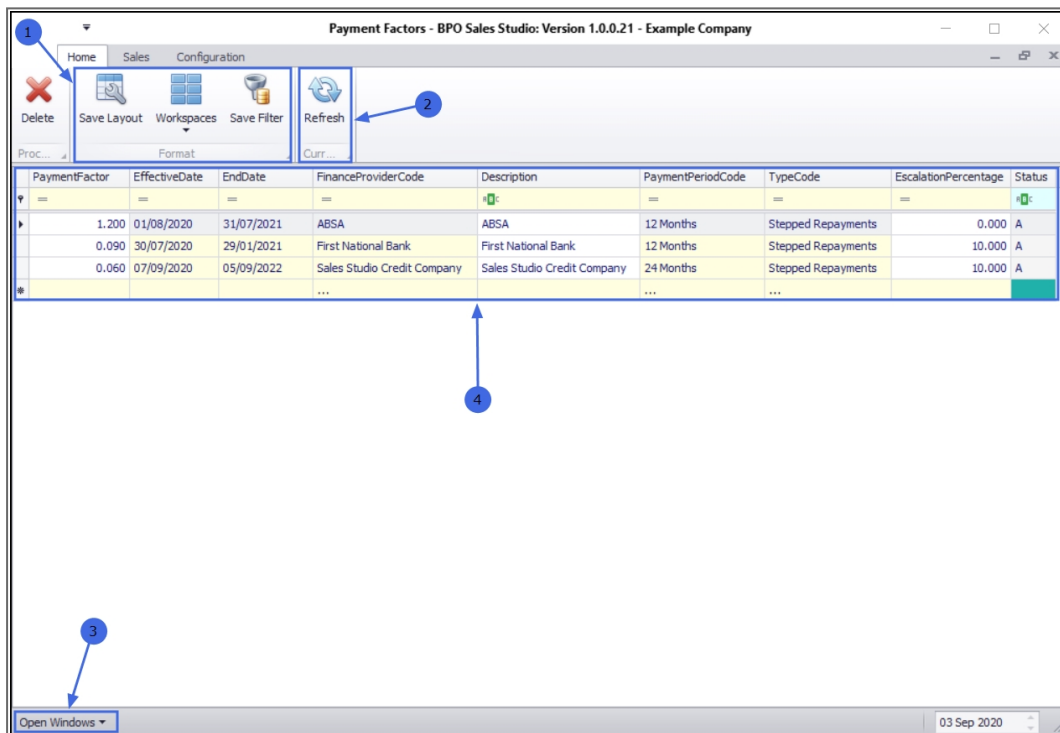
- Refresh: Clicking on this button will update the currently displayed page.

3. Open Windows:

- [Open Windows](#)

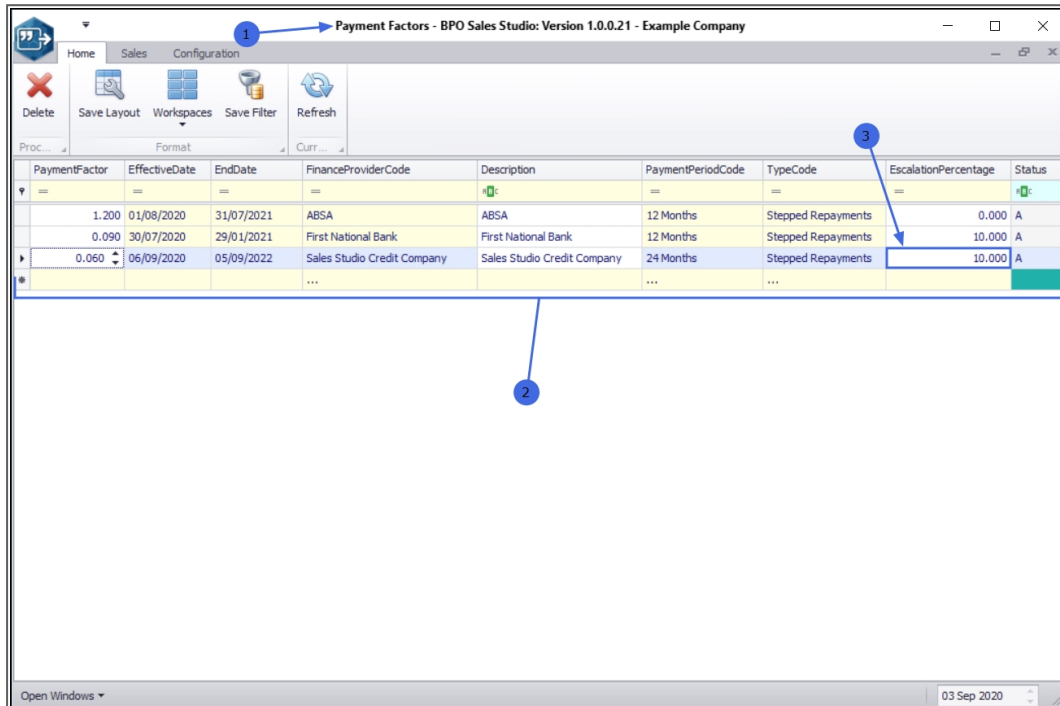
4. Data Grids:

- Refer to [Using BPO Data Grids](#) and [Data Grid Filtering](#) for further information regarding data grid functionality that can be utilised here.



SELECT THE PAYMENT FACTOR TO BE EDITED

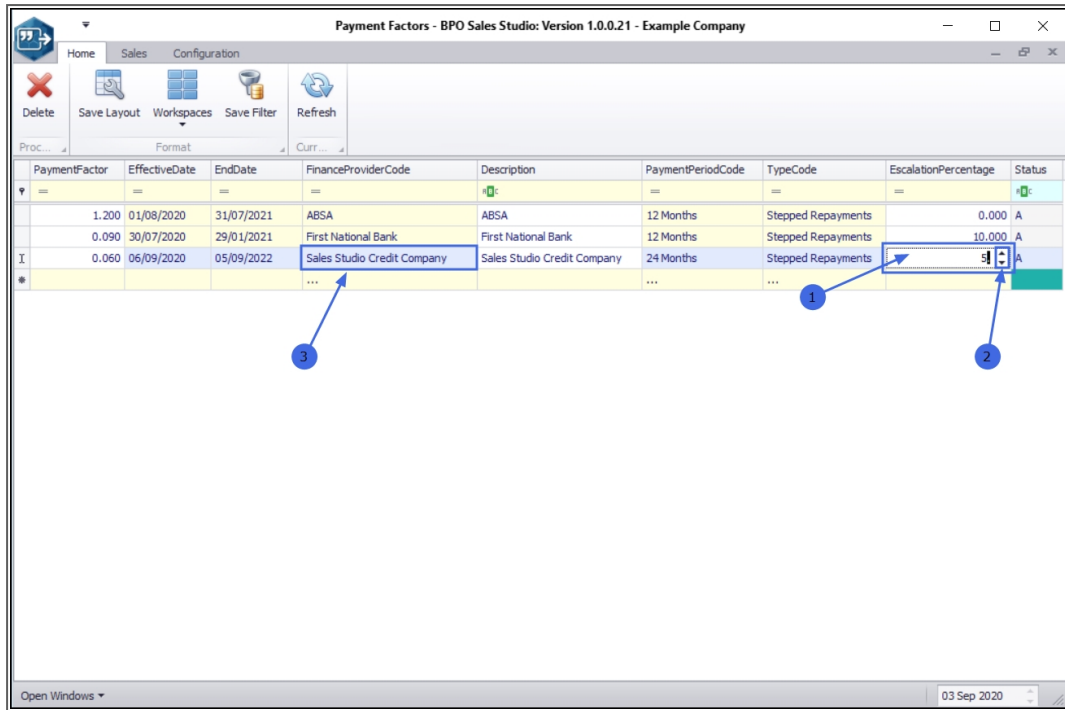
1. In the **Payment Factors** listing screen,
2. Select the **field** in the data grid that you wish to edit.
3. In this example, the **Escalation Percentage** is selected.



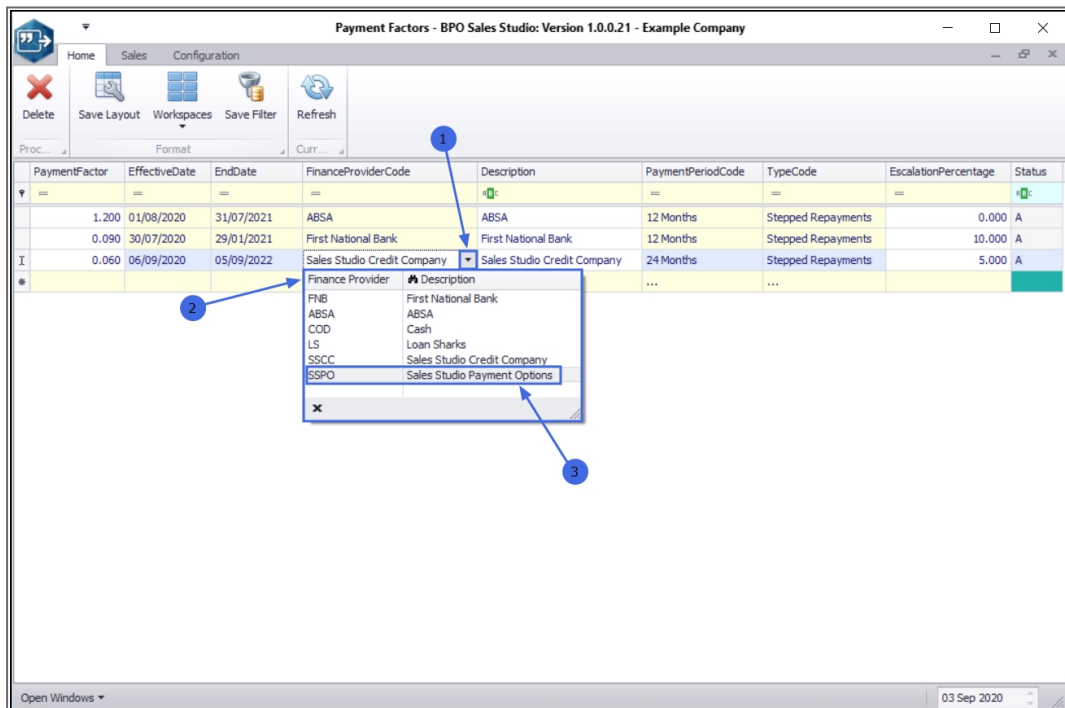
PaymentFactor	EffectiveDate	EndDate	FinanceProviderCode	Description	PaymentPeriodCode	TypeCode	EscalationPercentage	Status
1.200	01/08/2020	31/07/2021	ABSA	ABSA	12 Months	Stepped Repayments	0.000	A
0.090	30/07/2020	29/01/2021	First National Bank	First National Bank	12 Months	Stepped Repayments	10.000	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.



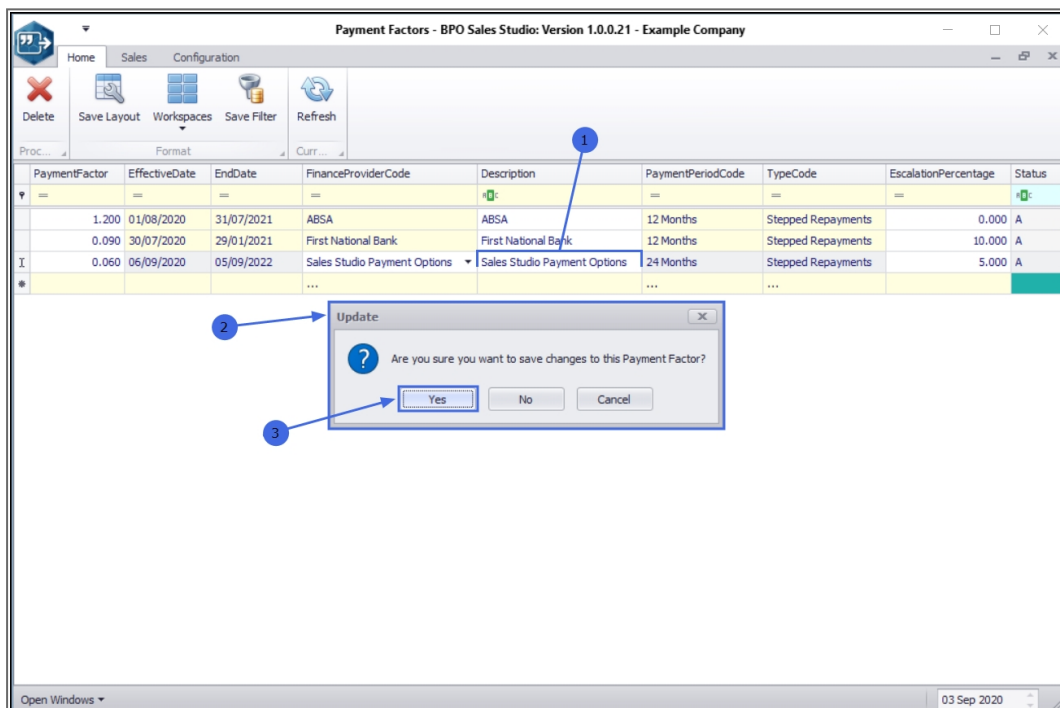
1. A drop-down **arrow** will appear. Click on the arrow to display
2. the Finance Provider Code drop-down **list**.
3. Select from this list, an alternative code.



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.

Payment Factors - BPO Sales Studio: Version 1.0.0.21 - Example Company

Home Sales Configuration

Delete Save Layout Workspaces Save Filter Refresh

Proc... Format Curr...

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 Payment Options	Sales Studio Payment Options	24 Months	Stepped Repayments	5.000	A
*					

Open Windows 03 Sep 2020

Diagram illustrating the flow of data from the table to the edit function:

```

graph TD
    A((1)) --> B[Edit Function]
    B --> C[Table Row]
    C --> D((2))
  
```

MNU.167.003

