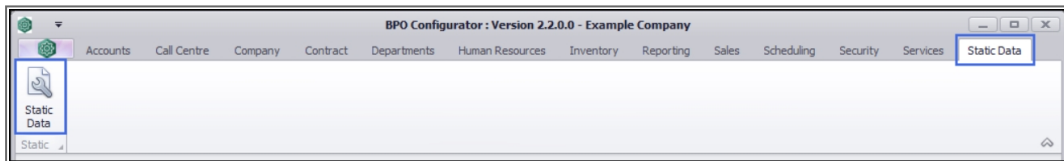


STATIC DATA

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*

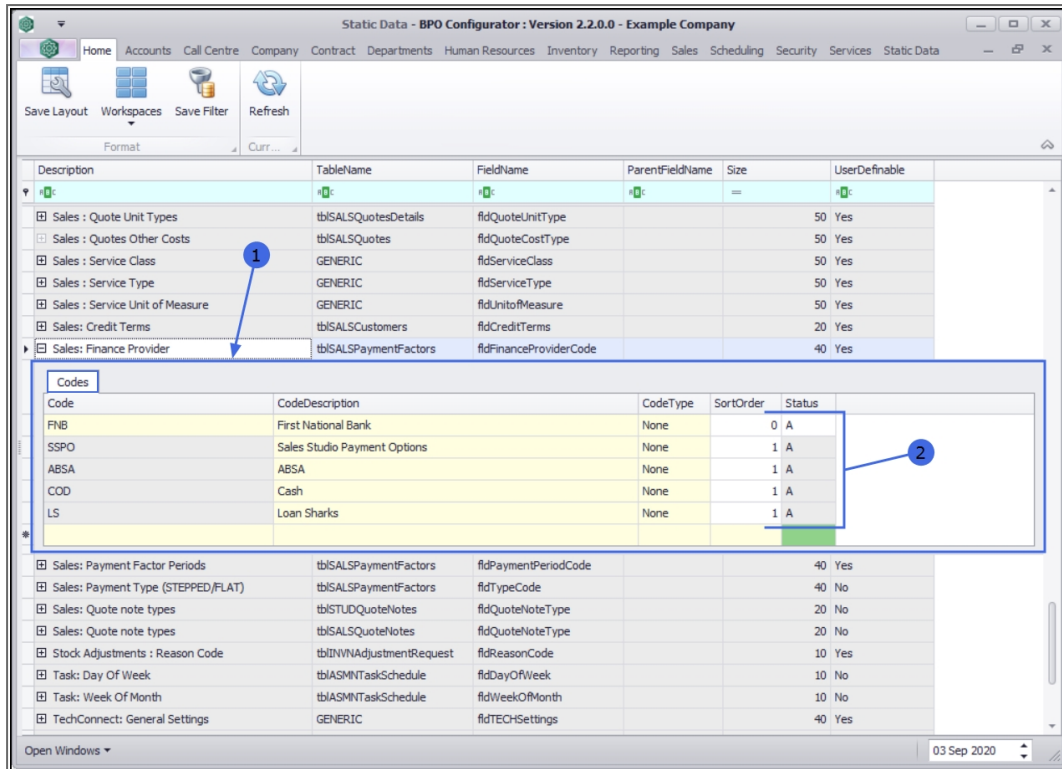


FIND THE FINANCE PROVIDER ROW

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.

| Description | TableName | FieldName | ParentFieldName | Size | UserDefinable |
|----------------------------------------|-------------------------|-----------------------|-----------------|------|---------------|
| + | + | + | + | = | + |
| [-] Sales : Quote detail types | tbISALSQuotesDetails | fdQuoteDetailType | | 50 | Yes |
| [-] Sales : Quote payment terms | tbISALSQuoteConfig | fdQuoteTermsCode | | 10 | Yes |
| [-] Sales : Quote Status | tbISALSQuotes | fdQuoteStatus | | 50 | Yes |
| [-] Sales : Quote Unit Types | tbISALSQuotesDetails | fdQuoteUnitType | | 50 | Yes |
| [-] Sales : Quotes Other Costs | tbISALSQuotes | fdQuoteCostType | | 50 | Yes |
| [-] Sales : Service Class | GENERIC | fdServiceClass | | 50 | Yes |
| [-] Sales : Service Type | GENERIC | fdServiceType | | 50 | Yes |
| [-] Sales : Service Unit of Measure | GENERIC | fdUnitofMeasure | | 50 | Yes |
| [-] Sales : Credit Terms | tbISALSCustomers | fdCreditTerms | | 20 | Yes |
| [-] Sales: Finance Provider | tbISALSPaymentFactors | fdFinanceProviderCode | | 40 | Yes |
| [-] Sales: Payment Factor Periods | tbISALSPaymentFactors | fdPaymentPeriodCode | | 40 | Yes |
| [-] Sales: Payment Type (STEPPED/FLAT) | tbISALSPaymentFactors | fdTypeCode | | 40 | No |
| [-] Sales: Quote note types | tbISTUDQuoteNotes | fdQuoteNoteType | | 20 | No |
| [-] Sales: Quote note types | tbISALSQuoteNotes | fdQuoteNoteType | | 20 | No |
| [-] Stock Adjustments : Reason Code | tblINWAdjustmentRequest | fdReasonCode | | 10 | Yes |
| [-] Task: Day Of Week | tblASMTTaskSchedule | fdDayOfWeek | | 10 | No |
| [-] Task: Week Of Month | tblASMTTaskSchedule | fdWeekOfMonth | | 10 | No |
| [-] TechConnect: General Settings | GENERIC | fdTECHSettings | | 40 | Yes |
| [-] Warranties : Warranty Type | tblWARRWarranty | fdType | | 10 | Yes |
| [-] Work Orders : Class | tblWKORWorkOrder | fdWOCClass | | 50 | Yes |
| [-] Work Orders : Rectification Codes | tblWKORWorkSchedule | fdRectificationCode | | 10 | Yes |
| [-] Work Orders : Type | tblWKORWorkOrder | fdWOTType | | 50 | Yes |
| [-] Work Orders: Work Order Status | tblWKORWorkOrder | fdStatus | | 1 | No |

1. The Sales Finance Provider **Codes** frame will be expanded.
2. In this example, there are currently 5 Finance Provider codes set up on the system.

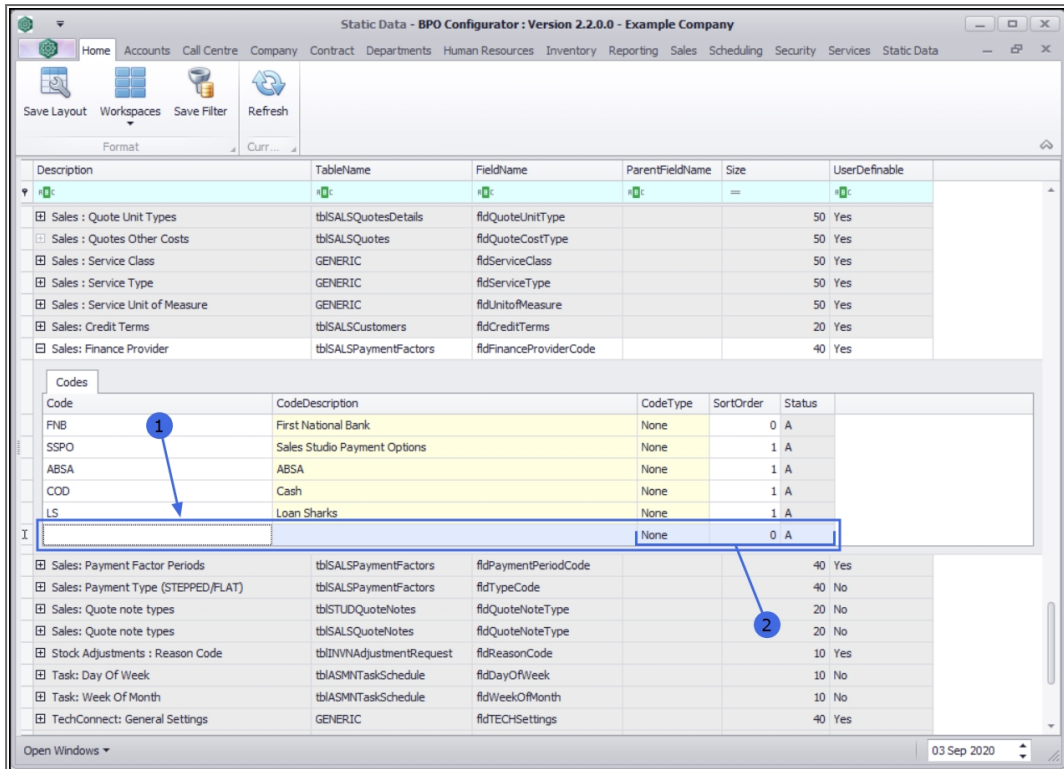


ADD A FINANCE PROVIDER

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.

| 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 |

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.



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 Configurator : Version 2.2.0.0 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Curr...

| Description | TableName | FieldName | ParentFieldName | Size | UserDefinable |
|-------------------------------------|-----------------------|------------------------|-----------------|------|---------------|
| + | + | + | + | = | + |
| [-] Sales : Quote Unit Types | tblSALSQuotesDetails | fldQuoteUnitType | | 50 | Yes |
| [-] 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 |
| [-] Sales: Credit Terms | tblSALSCustomers | fldCreditTerms | | 20 | Yes |
| [-] Sales: Finance Provider | tblSALSPaymentFactors | fldFinanceProviderCode | | 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 |
| | | 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 |
| [-] Sales: Quote note types | tblSALSQuoteNotes | fldQuoteNoteType | | 20 | No |
| [-] Stock Adjustments : Reason Code | tblINWAdjustmentRequest | 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

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.

Static Data - BPO Configurator : Version 2.2.0.0 - Example Company

| Description | TableName | FieldName | ParentFieldName | Size | UserDefinable |
|-------------------------------------|-----------------------|-----------------------|-----------------|------|---------------|
| + | + | + | + | = | + |
| [-] Sales : Quote Unit Types | tblSALSQuotesDetails | fdQuoteUnitType | | | 50 Yes |
| [-] Sales : Quotes Other Costs | tblSALSQuotes | fdQuoteCostType | | | 50 Yes |
| [-] Sales : Service Class | GENERIC | fdServiceClass | | | 50 Yes |
| [-] Sales : Service Type | GENERIC | fdServiceType | | | 50 Yes |
| [-] Sales : Service Unit of Measure | GENERIC | fdUnitofMeasure | | | 50 Yes |
| [-] Sales: Credit Terms | tblSALSCustomers | fdCreditTerms | | | 20 Yes |
| [-] Sales: Finance Provider | tblSALSPaymentFactors | fdFinanceProviderCode | | | 40 Yes |

| 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 |
| * SSSC | Sales Studio Credit Company | None | 0 | A |

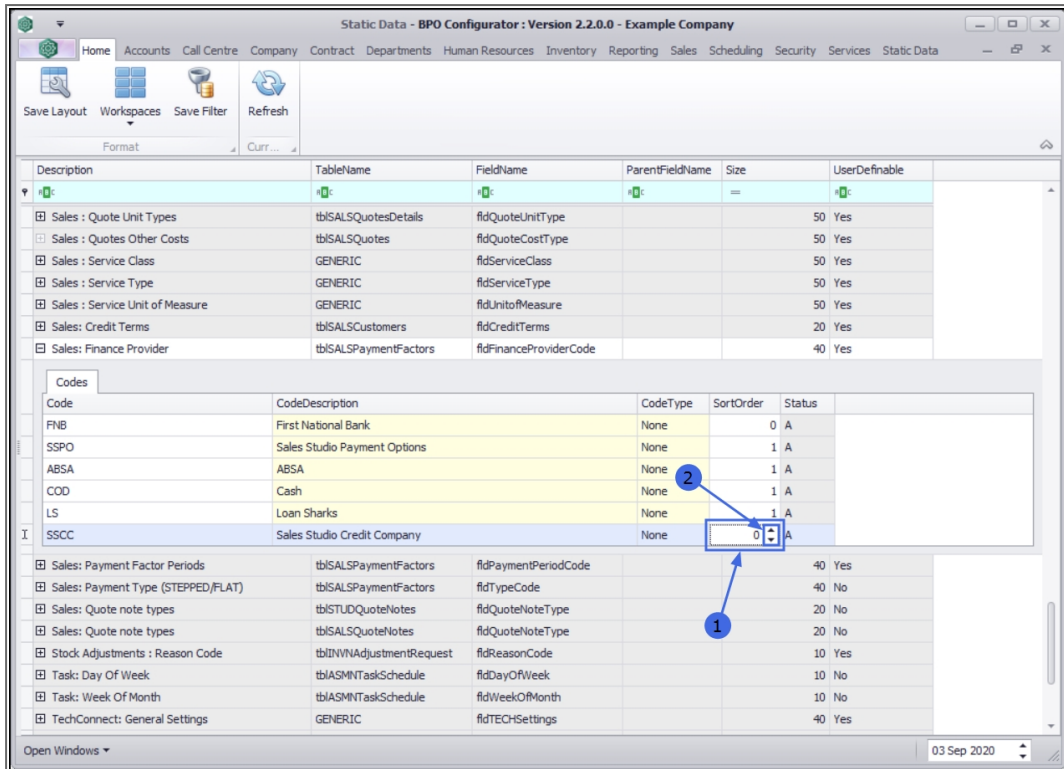
| Description | TableName | FieldName | CodeType | SortOrder | Status |
|----------------------------------------|--------------------------|---------------------|----------|-----------|--------|
| [-] Sales: Payment Factor Periods | tblSALSPaymentFactors | fdPaymentPeriodCode | | | 40 Yes |
| [-] Sales: Payment Type (STEPPED/FLAT) | tblSALSPaymentFactors | fdTypeCode | | | 40 No |
| [-] Sales: Quote note types | tblSTUDQuoteNotes | fdQuoteNoteType | | | 20 No |
| [-] Sales: Quote note types | tblSALSQuoteNotes | fdQuoteNoteType | | | 20 No |
| [-] Stock Adjustments : Reason Code | tblINWNAdjustmentRequest | fdReasonCode | | | 10 Yes |
| [-] Task: Day Of Week | tblASMNTaskSchedule | fdDayOfWeek | | | 10 No |
| [-] Task: Week Of Month | tblASMNTaskSchedule | fdWeekOfMonth | | | 10 No |
| [-] TechConnect: General Settings | GENERIC | fdTECHSettings | | | 40 Yes |

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:

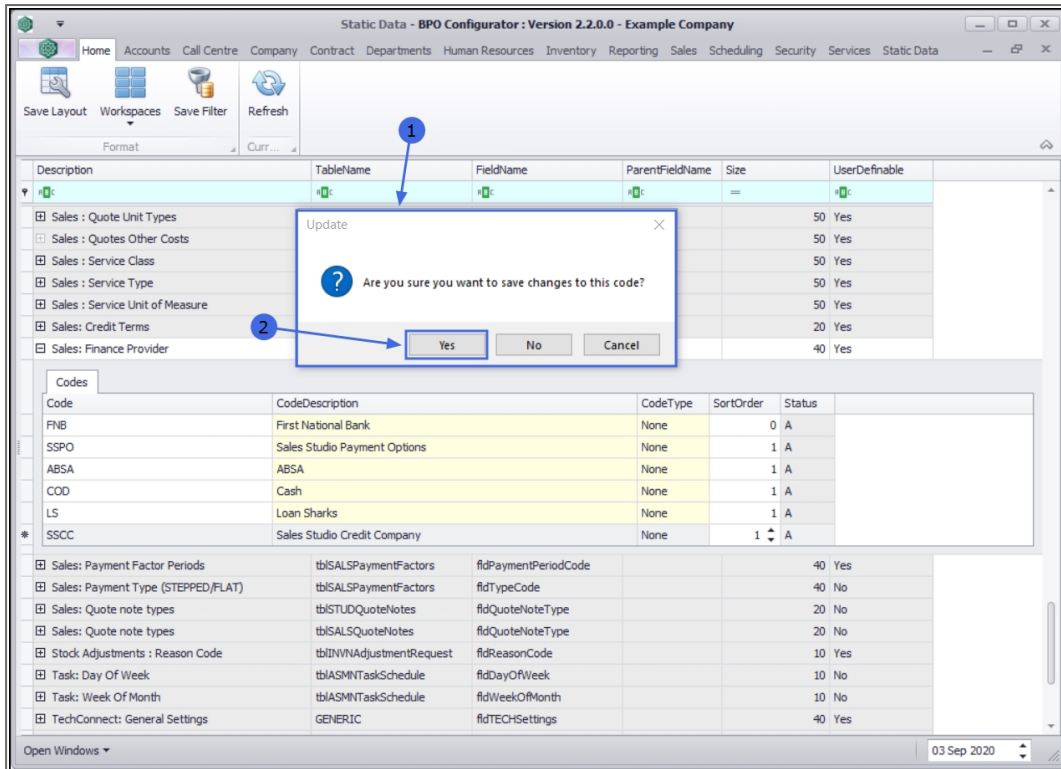
1. Click in this text box and either **type in** the new number
2. Or use the **arrow indicators** revealed, to select the sort order number for this new Finance Provider.



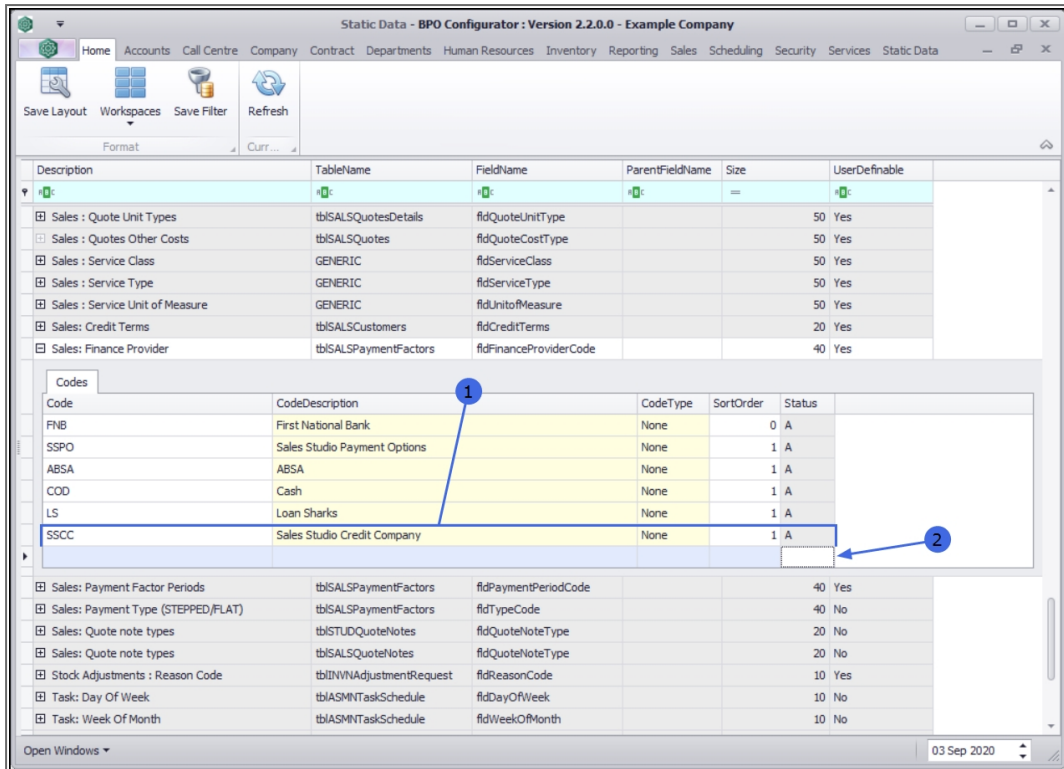
SAVE FINANCE PROVIDER DETAILS

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**.

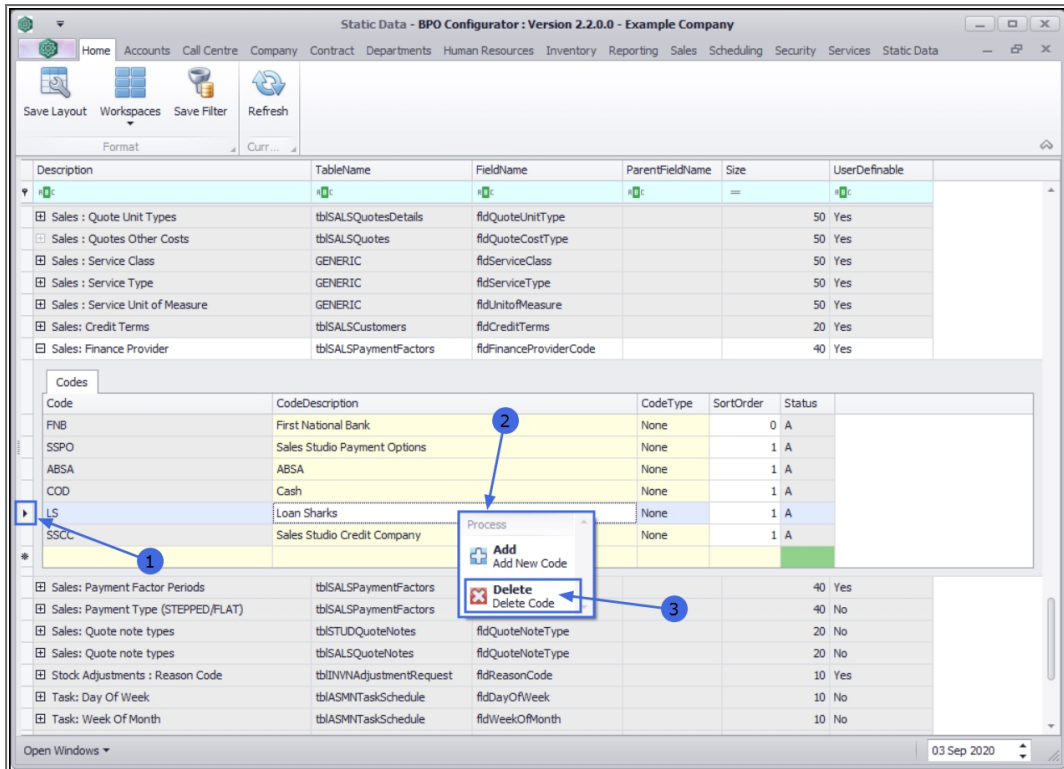


1. The new Finance Provider details will be **saved**.
2. A **new row** will be added to the **Codes** data grid.

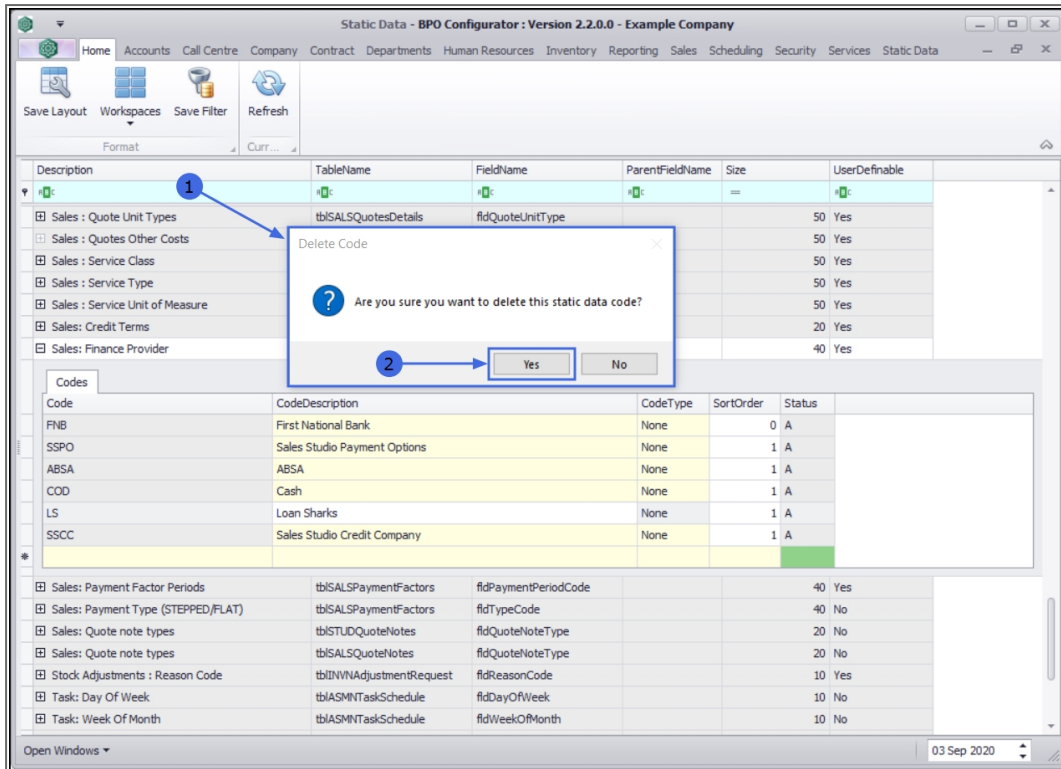


DELETE A FINANCE PROVIDER

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**.



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**.



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.

MNU.108.052