

# 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

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

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## **PAYMENT FACTORS LISTING SCREEN - INTERFACE**

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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**

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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**

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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**

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

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