

SALES STUDIO CONFIGURATION

ADD 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 **add** 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*

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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 a Payment Factor](#) manual.

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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.

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ADD A NEW PAYMENT FACTOR

1. Click in the **final row** of the Payment Factor column. The field will be 'activated'.
2. Either **type in** the required Payment Factor figure, or
3. Use the **directional arrows**, to select the Payment Factor figure.



EFFECTIVE DATE AND END DATE

1. As you start editing the Payment Factor field, the following fields will auto populate:
2. **Effective Date** (start date), **End Date** and
3. **Escalation Percentage**
4. Click in the **Effective Date** field.



1. A drop-down **arrow** will appear. Click on this arrow to display,
2. the **Calendar** function
3. You will note that you cannot select dates *prior* to the current date, but you can select the *current* date or a future Effective Date.



1. Click in the **End Date** field.
2. A drop-down **arrow** will appear. Click on this arrow to display
3. the **Calendar** function
4. You will note that you cannot select either the *current* date or dates *prior* to the current date, but you can select a future End Date.



In this scenario, the End Date will usually be several months ahead of the Effective Date so the

1. **Year, Month** and
2. **Day** have been edited to make the End Date,
3. **24 months** from the Effective Date.

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FINANCE PROVIDER CODE AND DESCRIPTION

1. Click in the **Finance Provider Code** field to reveal a drop-down **arrow**.
2. Click on this arrow to display the Finance Provider Codes drop-down **list**. (The contents of this list will have been set up in your system [Con-figurator](#).)
3. Select the required Provider from the list.

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1. The Finance Provider Code **Description** will auto populate as the Code is selected.

PAYMENT PERIOD CODE

2. Click in the **Payment Period Code** field to reveal a drop-down **arrow**.
3. Click on this arrow to display the Payment Period Code drop-down **list**. (The contents of this list will have been set up in your system [Con-figurator](#).)
4. **Select** the required Period from the list.

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TYPE CODE

1. Click in the **Type Code** field to reveal a drop-down arrow.
2. Click on this arrow to display the Type Codes drop-down **list**. (The contents of this list will have been set up in your system [Configurator.](#))
3. Select the required Type from the list.



ESCALATION PERCENTAGE

1. Click in the **Escalation Percentage** field and either,
2. **Type in** or,
3. Use the **directional arrows**, to select the Escalation Percentage amount.



SAVE THE NEW PAYMENT FACTOR

When you have finished adding the new Payment Factor 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 Payment Factor?**
2. Click on **Yes**.



1. The new Payment Factor details will be **saved**.
2. The **Status** column will now display as **A** (Active).
3. A **new row** will be added to the data grid.
4. **Close** the screen when you are done.

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