

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*

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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.



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**.

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1. The edited details will be **saved**.
2. **Exit** the screen when you are done.

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