SALES STUDIO CONFIGURATION

DELETE 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 **delete** 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. Here you will find a data grid of Payment Factors already set up on the system.
3. There is only **1** Processing button in this screen: **Delete**, which will be covered further on, in this 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 PAYMENT FACTOR TO BE DELETED

1. In the *Payment Factors* data grid,
2. Select the *row* of the Payment Factor that you wish to delete.
3. Click on *Delete*.

1. A *Delete Payment Factor* message box will pop up asking;
    - *Are you sure you want to delete this Payment Factor?*
2. Click on *Yes*.

1. The screen will refresh and the selected Payment Factor details will be *deleted*.
2. *Exit* the screen when you are done.

MNU.167.004