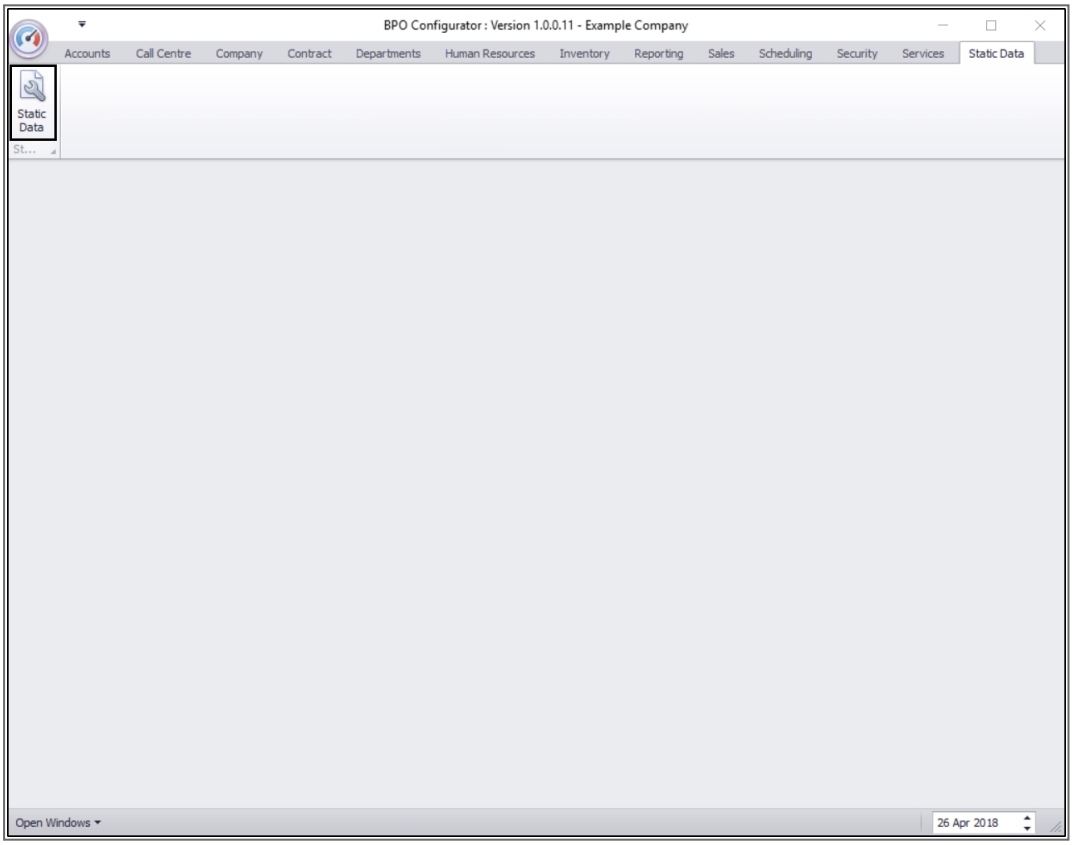
We are currently updating our site; thank you for your patience.

STATIC DATA

STATIC DATA - SALES: QUOTE PAYMENT TERMS (REPAYMENT METHOD)

Ribbon Access: Configurator > Static Data> Static Data



- The **Static Data** listing screen will be displayed.
- Use the **filter row** or **scroll down** the list until you find the **Sales: Quote payment terms** row.
- Click on the **expand** icon in this row.

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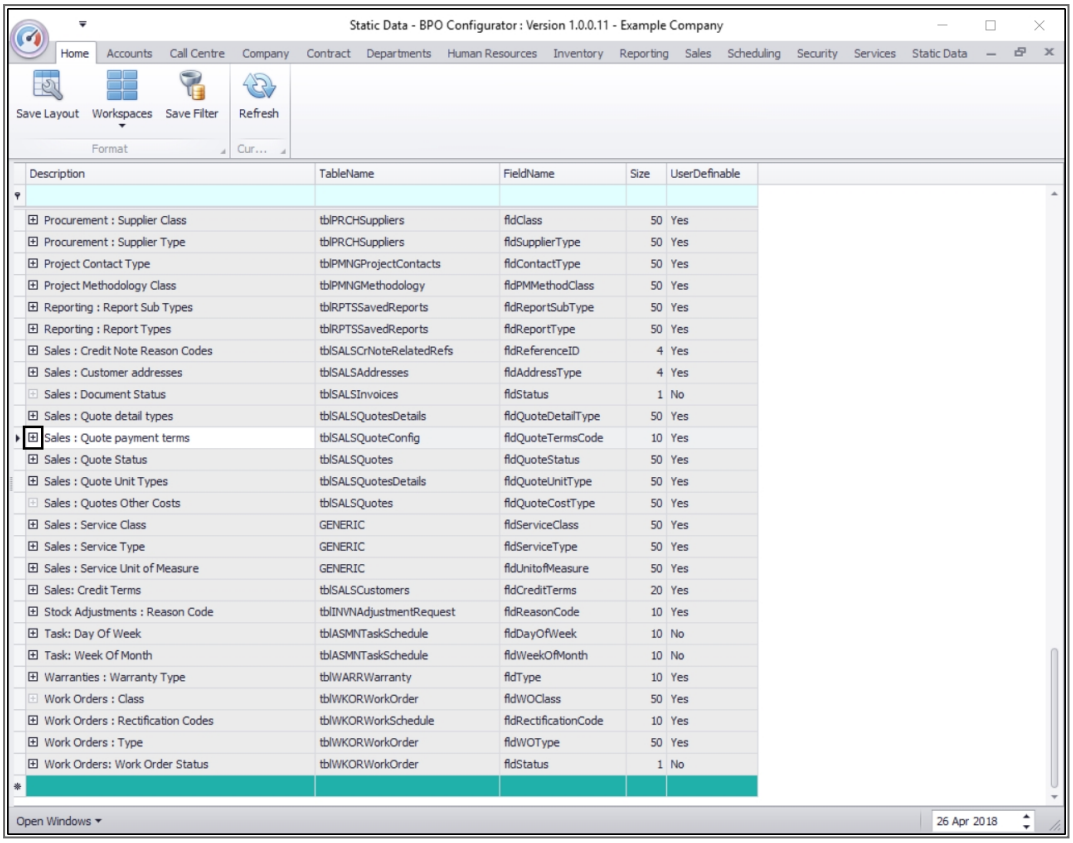

- The Sales: Quote payment terms **Codes** frame will be expanded.
- Here you can view a list of **Sales: Quote payment terms codes** currently on the system.

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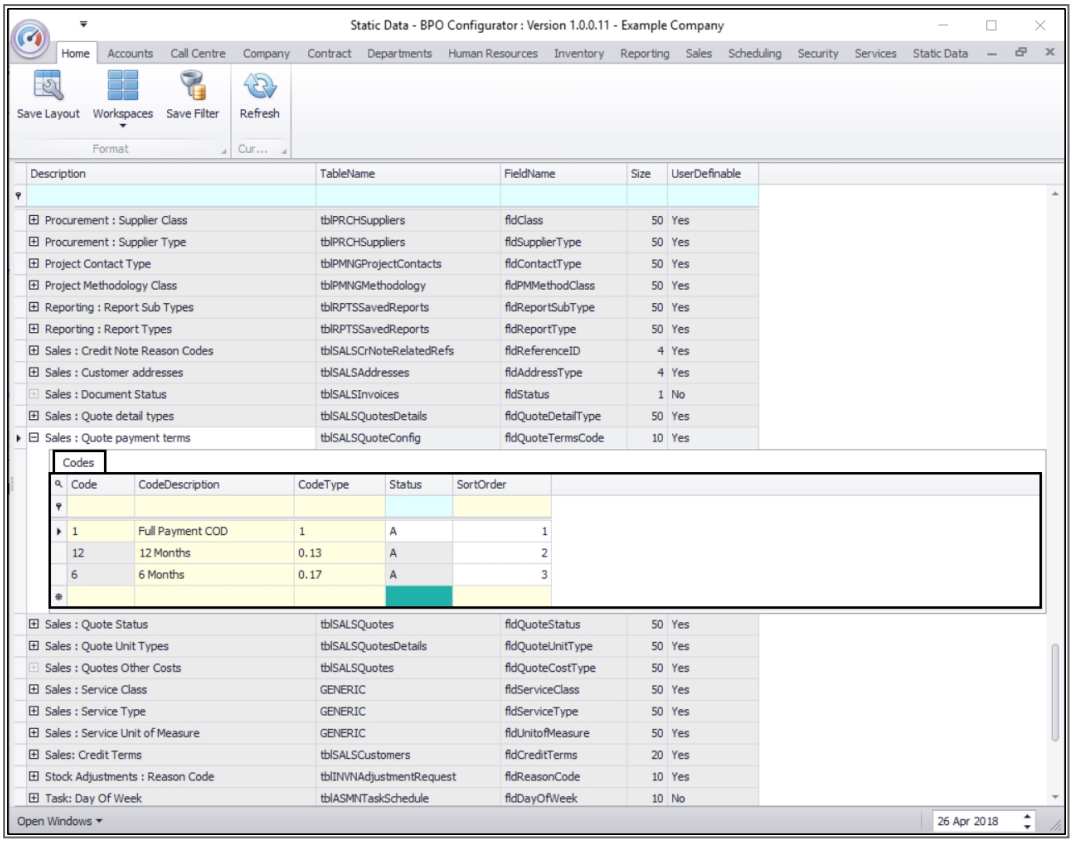

- **Right click** anywhere in a **row** of the **Codes** data grid.
- A **Process** menu will pop up.
- Click on **Add** - Add New Code.

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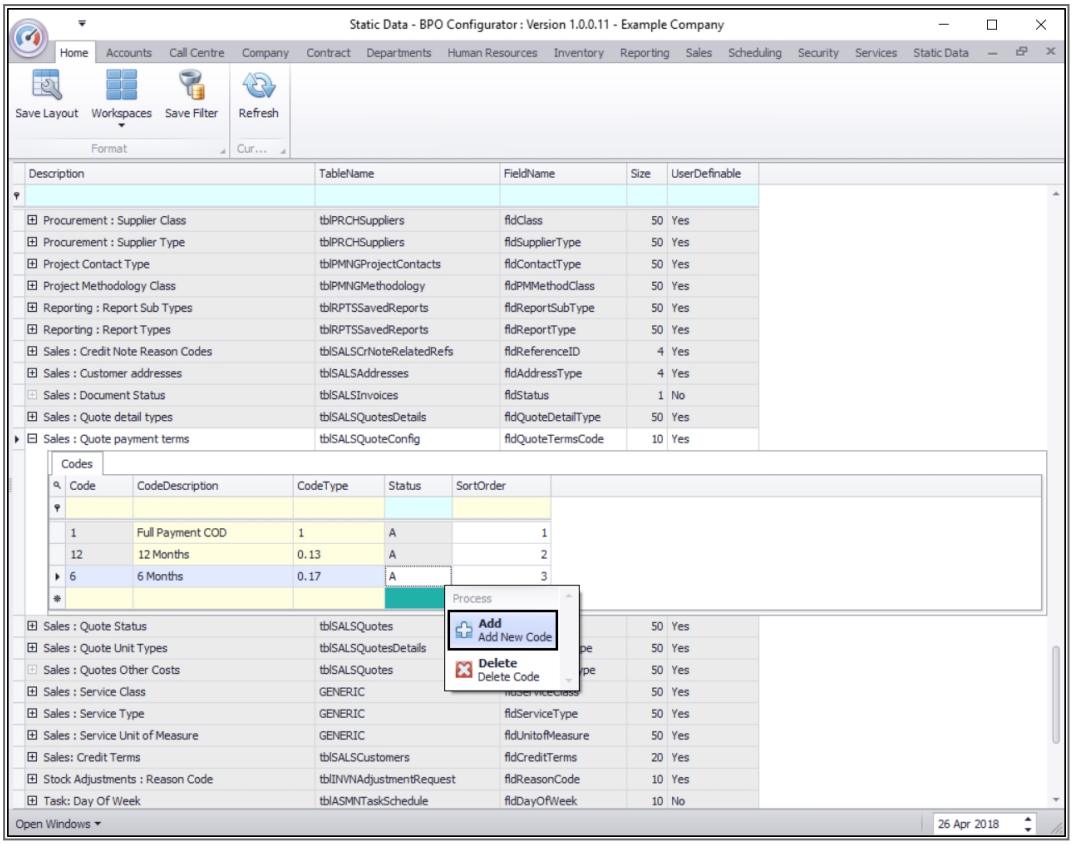

- The **final row** in the **Codes** data grid will now be **'activated'**.
    - The **Code Type**, **Status** and **Sort Order** columns will now be populated.

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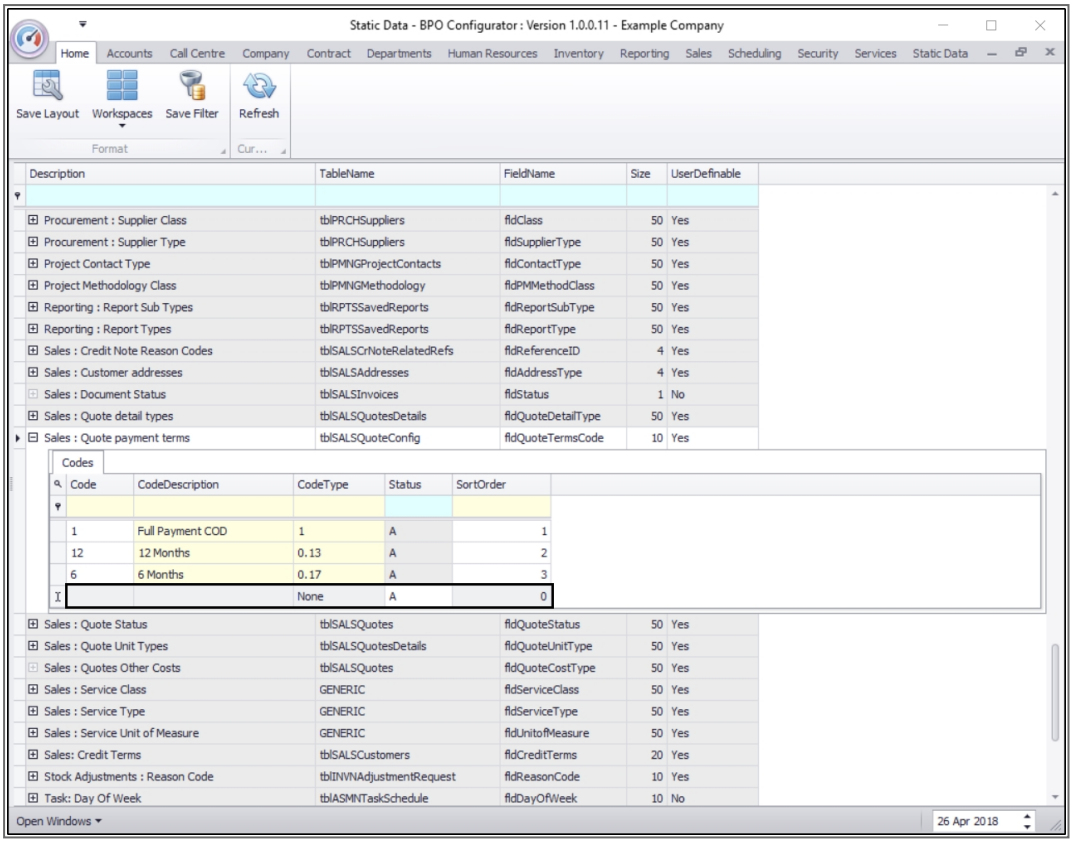

- **Code:** Click in this text box and type in a **code** specific for this new sales quote payment term.
- **Code Description:** Click in this text box and type in a **description** for this new sales quote payment code.

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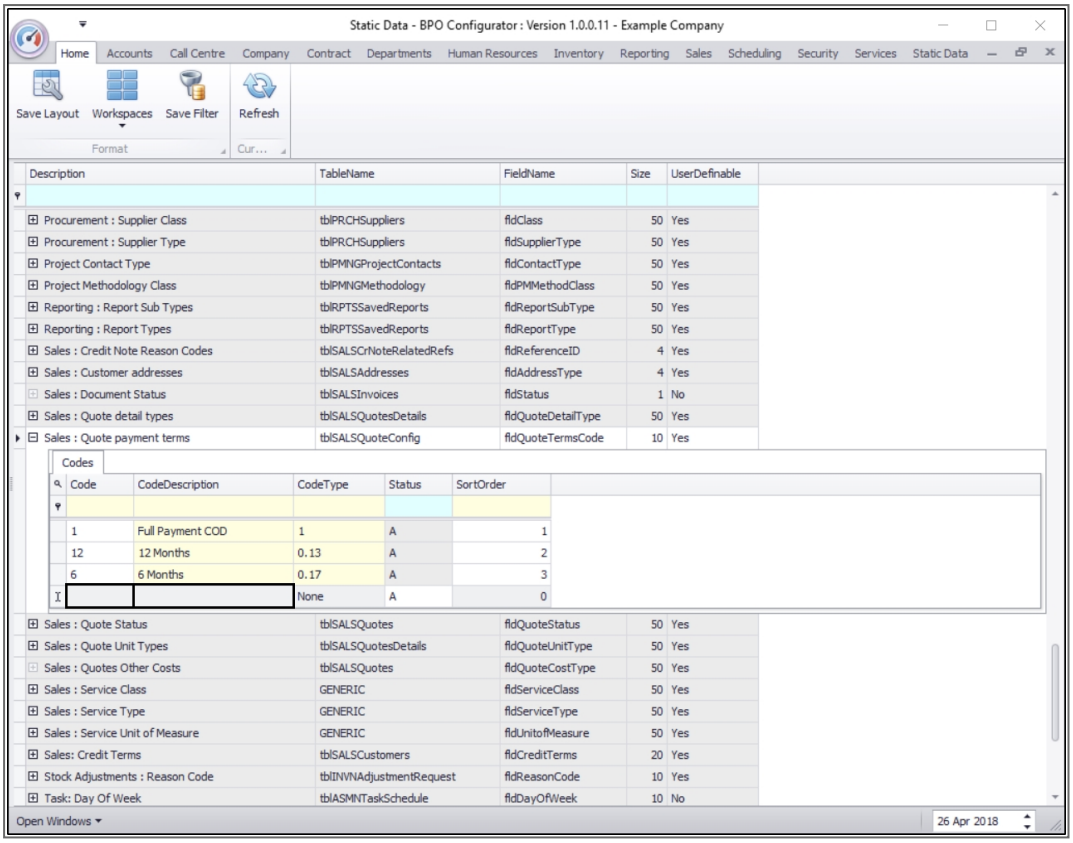

- **Code Type:** This can remain as **None**.
- **Status:** This will auto populate with **A** - Active.
- **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new sales quote payment code.
    - **Note:** The **sort order** is the order in which this will appear in the sales quote payment code drop-down list in BPO2. If each sales quote payment code has the number **1**, then the drop-down list will usually default to an alphabetical order in BPO2. If, as in the next image, it is numbered **4**, then it

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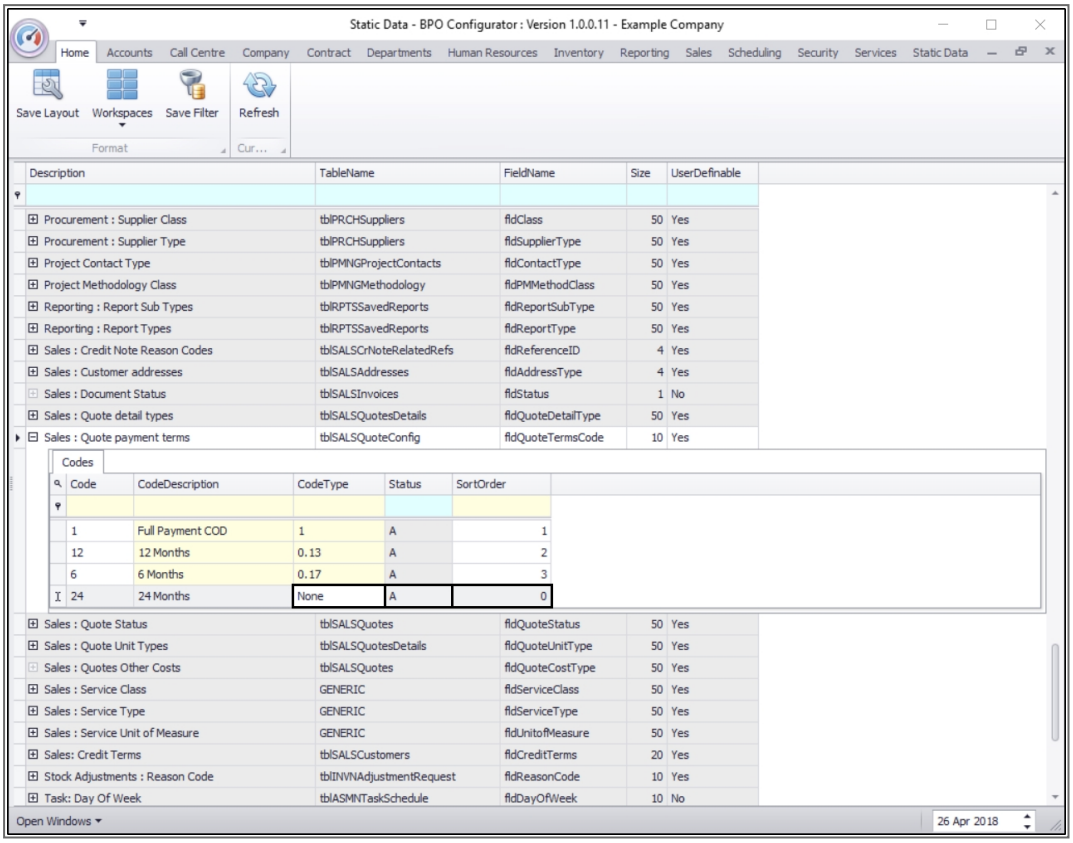
will appear **4th** in the drop-down list in BPO.



- When you have finished adding the new sales quote payment code details, press **Enter**.
- An **Update** message box will appear, asking;
    - **Are you sure you want to save changes to this code?**

- Click on **Yes**.

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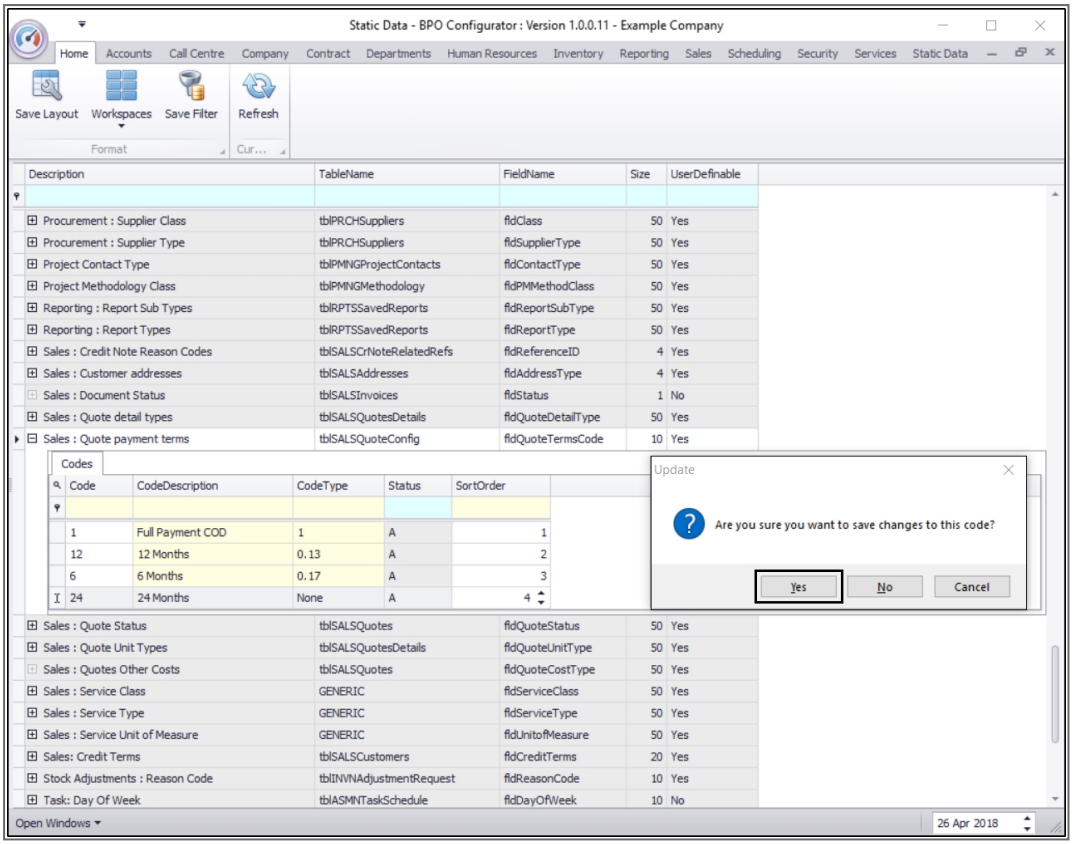

- The new sales quote payment code will be **saved** and a **new row** will be added to the **Codes** data grid.
- **Collapse** the Codes frame.

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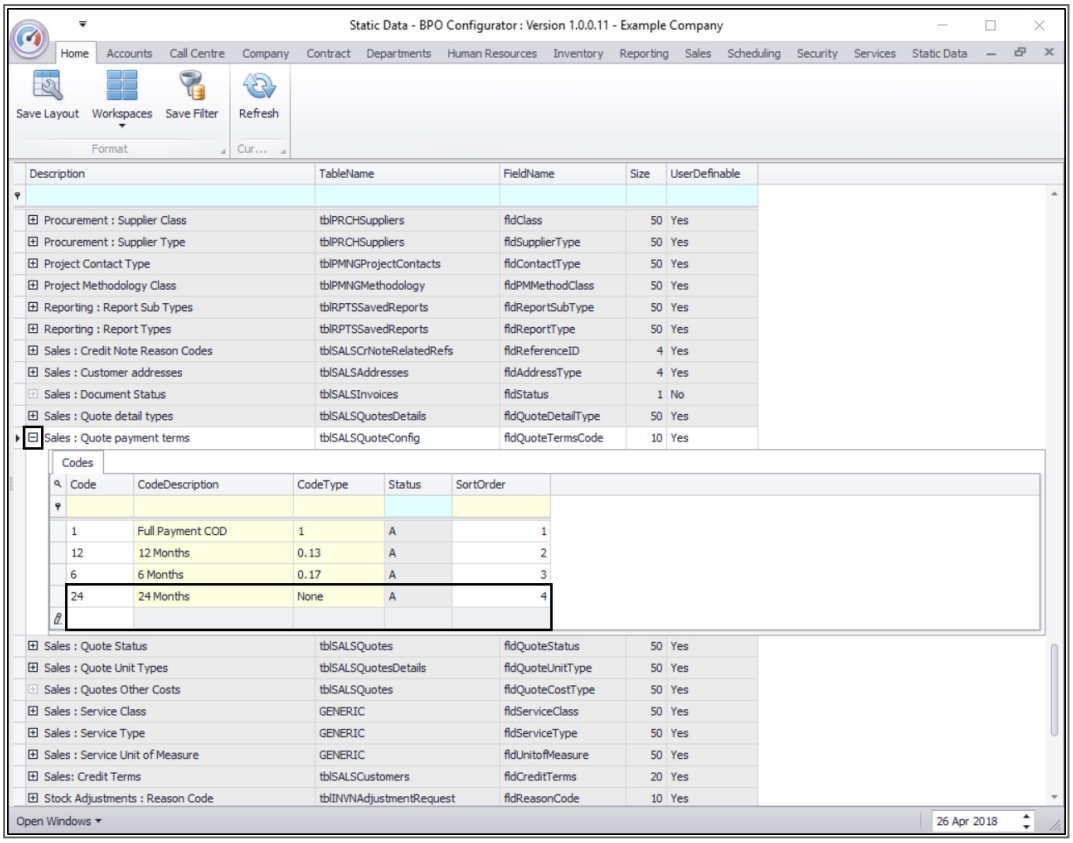

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