

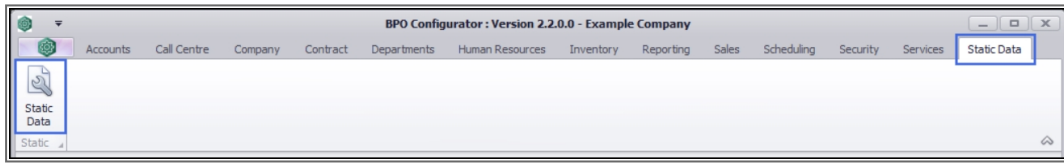
We are currently updating our site; thank you for your patience.

## STATIC DATA

### STATIC DATA – SALES: PAYMENT FACTOR PERIODS

Payment Factor Periods in BPO2 determine the length of time, agreed between the Finance Provider and the customer, to repay the funds borrowed.

**Ribbon Access:** Configurator > Static Data > Static Data

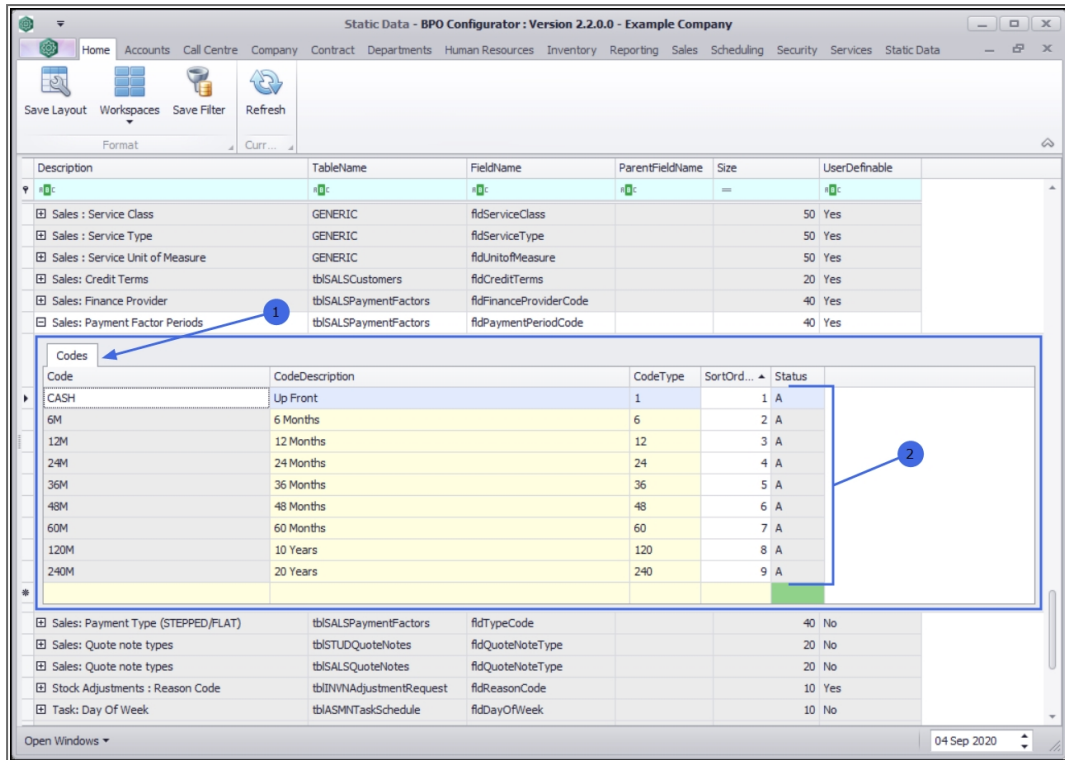


### FIND THE SALES: PAYMENT FACTOR PERIODS ROW

1. The **Static Data** listing screen will be displayed.
2. Use the **filter row** or **scroll down** the list until you find
3. the **Sales: Payment Factor Periods** row.
4. Click on the **expand** icon in this row.

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
•	•	•	•	=	•
[-] Sales : Document Status	tbISALInvoices	fldStatus		1	No
[-] Sales : Quote detail types	tbISALQuoteDetails	fldQuoteDetailType		50	Yes
[-] Sales : Quote payment terms	tbISALQuoteConfig	fldQuoteTermsCode		10	Yes
[-] Sales : Quote Status	tbISALQuotes	fldQuoteStatus		50	Yes
[-] Sales : Quote Unit Types	tbISALQuoteDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tbISALQuotes	fldQuoteCostType		50	Yes
[-] Sales : Service Class	GENERIC	fldServiceClass		50	Yes
[-] Sales : Service Type	GENERIC	fldServiceType		50	Yes
[-] Sales : Service Unit of Measure	GENERIC	fldUnitofMeasure		50	Yes
[-] Sales : Credit Terms	tbISALCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tbISALPaymentFactors	fldFinanceProviderCode		40	Yes
[-] Sales : Payment Factor Periods	tbISALPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tbISALPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tbISTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tbISALQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tbIINWAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tbIASMNTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tbIASMNTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes
[-] Warranties : Warranty Type	tbWARRWarranty	fldType		10	Yes
[-] Work Orders : Class	tbWKORWorkOrder	fldWOClass		50	Yes
[-] Work Orders : Rectification Codes	tbWKORWorkSchedule	fldRectificationCode		10	Yes
[-] Work Orders : Type	tbWKORWorkOrder	fldWOType		50	Yes
[-] Work Orders : Work Order Status	tbWKORWorkOrder	fldStatus		1	No

1. The Sales Payment Factor Periods **Codes** frame will be expanded.
2. In this example, there are currently 9 Payment Factor Period codes already set up on the system.



## ADD A PAYMENT FACTOR PERIOD

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

Static Data - BPO Configurator : Version 2.2.0.0 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Layout Workspaces Save Filter Refresh

Format Curr...

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
+	+	+	+	=	+
Sales : Service Class	GENERIC	fidServiceClass		50	Yes
Sales : Service Type	GENERIC	fidServiceType		50	Yes
Sales : Service Unit of Measure	GENERIC	fidUnitofMeasure		50	Yes
Sales: Credit Terms	tbISALSCustomers	fidCreditTerms		20	Yes
Sales: Finance Provider	tbISALSPaymentFactors	fidFinanceProviderCode		40	Yes
Sales: Payment Factor Periods	tbISALSPaymentFactors	fidPaymentPeriodCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrd...	Status
CASH	Up Front	1	1	A
6M	6 Months	6	2	A
12M	12 Months	12	3	A
24M	24 Months	24	4	A
36M	36 Months	36	5	A
48M	48 Months	48	6	A
60M	60 Months	60	7	A
120M	10 Years	120	8	A
240M	20 Years	240	9	A

Process

Add New Code

Delete Code

1

2

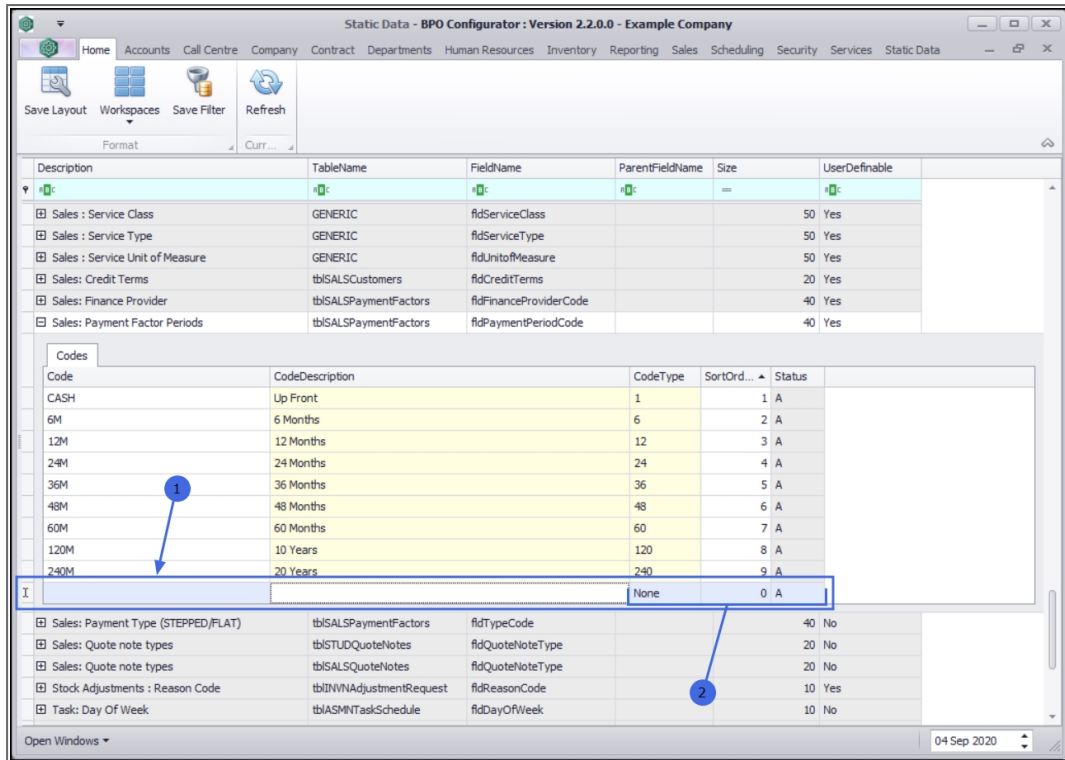
3

Sales: Payment Type (STEPPED/FLAT)	tbISALSPaymentFactors	fidTypeCode		40	No
Sales: Quote note types	tbISTUDQuoteNotes	fidQuoteNoteType		20	No
Sales: Quote note types	tbISALSQuoteNotes	fidQuoteNoteType		20	No
Stock Adjustments : Reason Code	tbINVNAdjustmentRequest	fidReasonCode		10	Yes
Task: Day Of Week	tbIASMNTaskSchedule	fidDayOfWeek		10	No

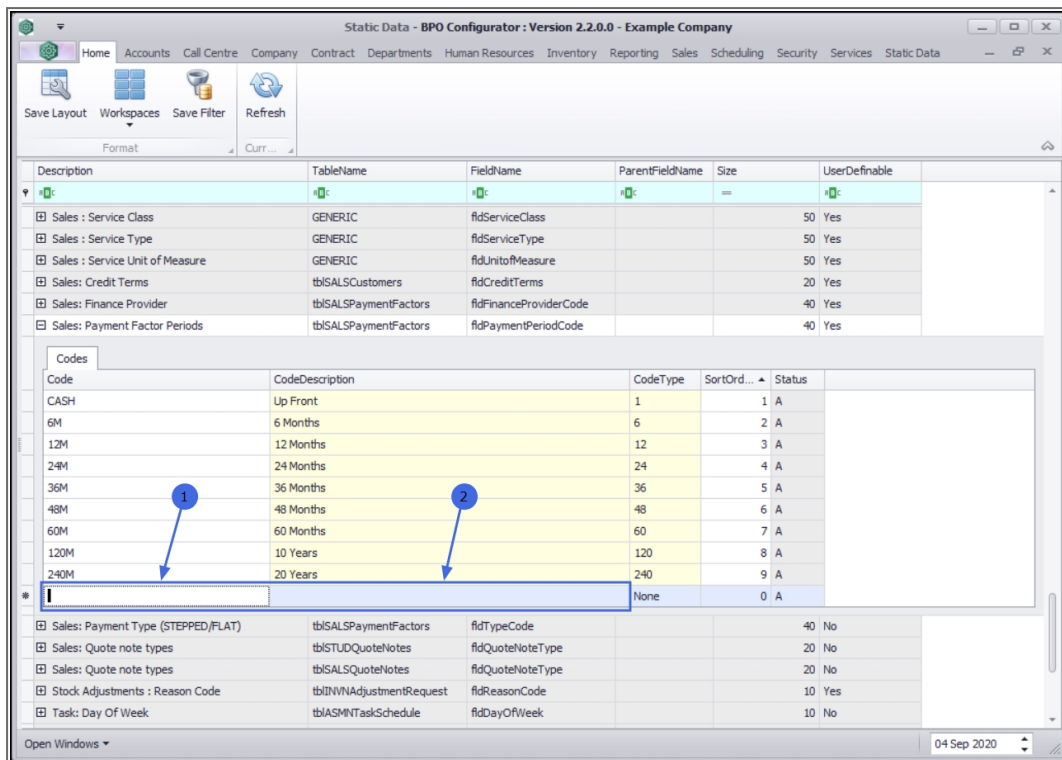
Open Windows

04 Sep 2020

1. The **final row** in the Codes data grid will now be '**activated**'.
2. The **Code Type, Sort Order** and **Status** columns will auto populate.



1. **Code:** Click in this text box and type in a **code** specific for this new Payment Factor Period.
2. **Code Description:** Click in this text box and type in a **description** for this new Payment Factor Period code.



Once you have added a **Code** and **Code Description**,

1. **Code Type:** This can remain as **None**. In this data grid, the Code Types have been given numbers according to their month equivalent. Therefore we could type in **18**, as the new Payment Factor Period is for 18 months.
2. **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the sort order for this new Finance Provider code.
3. **Status:** This will auto populate with **A** - Active.

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
Sales : Service Class	GENERIC	fidServiceClass		50	Yes
Sales : Service Type	GENERIC	fidServiceType		50	Yes
Sales : Service Unit of Measure	GENERIC	fidUnitofMeasure		50	Yes
Sales : Credit Terms	tbSALSCustomers	fidCreditTerms		20	Yes
Sales : Finance Provider	tbSALSPaymentFactors	fidFinanceProviderCode		40	Yes
Sales : Payment Factor Periods	tbSALSPaymentFactors	fidPaymentPeriodCode		40	Yes

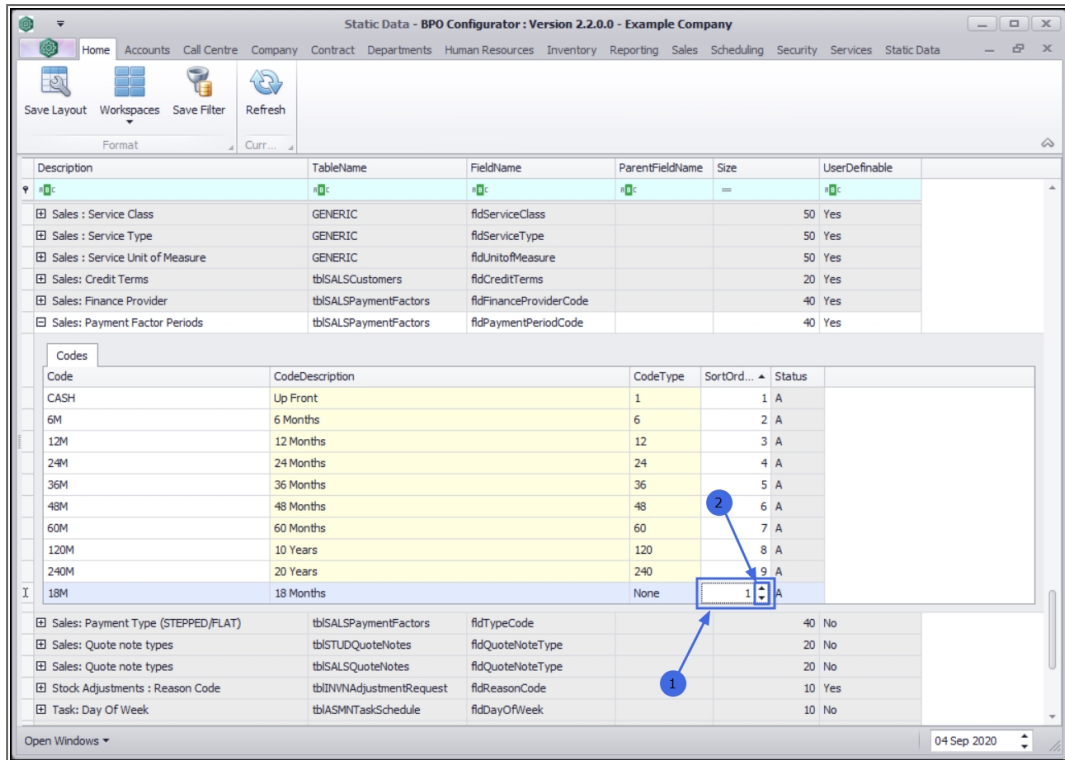
Code	CodeDescription	CodeType	SortOrd	Status
CASH	Up Front	1	1	A
6M	6 Months	6	2	A
12M	12 Months	12	3	A
24M	24 Months	24	4	A
36M	36 Months	36	5	A
48M	48 Months	48	6	A
60M	60 Months	60	7	A
120M	10 Years	120	8	A
240M	20 Years	240	9	A
18M	18 Months	None	1	A

### Note on Sort Order:

The sort order is the order in which this new Payment Factor Period will appear in the Payment Factor Period drop-down list in BPO2. If each Payment Factor Period has the same number e.g. 0 or 1, then the drop-down list will usually default to an alphabetical order in BPO2. If you wish the Payment Factor Periods to be listed in a certain order then number each one in the order that you wish to view them.

If you wish to change the **change** the Sort Order number:

1. Click in this text box and either **type in** the new number or
2. Use the **arrow indicators** revealed, to select the sort order number for this new Payment Factor Period.

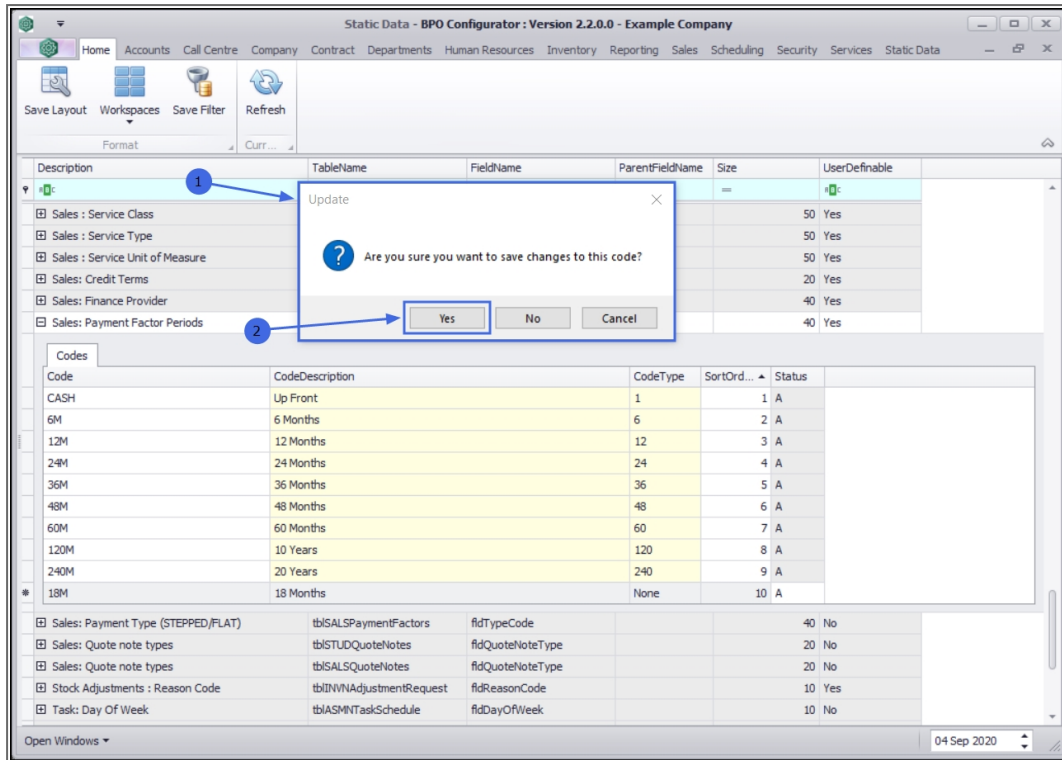


## SAVE PAYMENT FACTOR PERIOD DETAILS

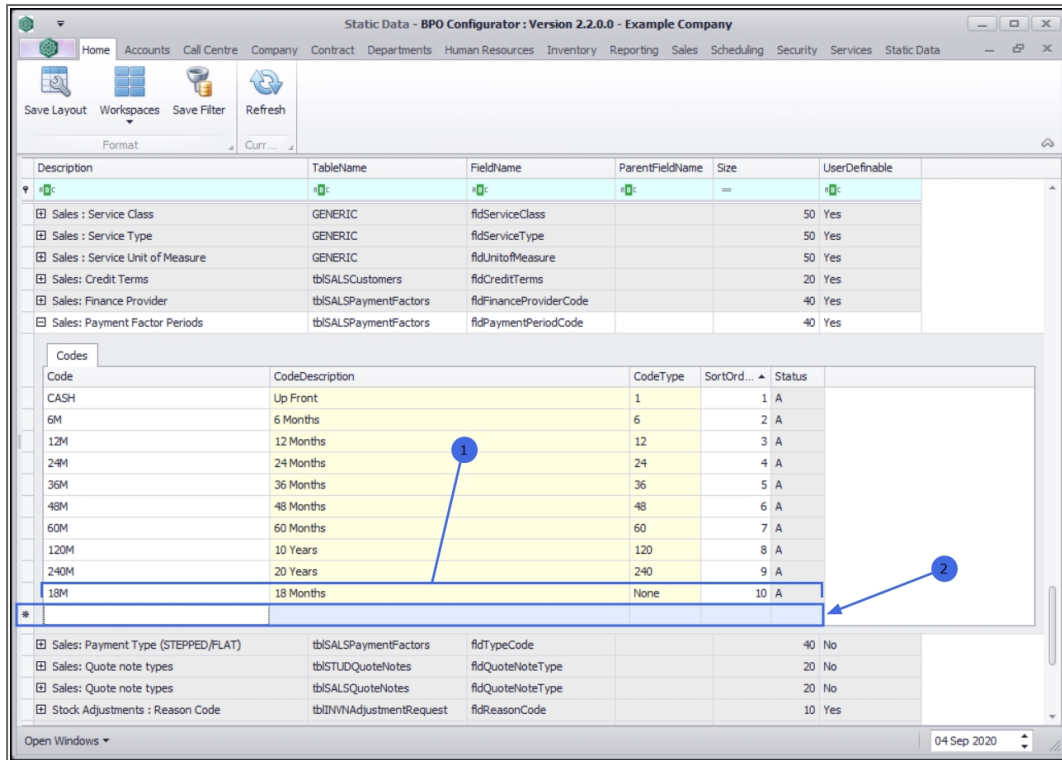
When you have finished adding the new Payment Factor Period details, either press **Tab** or **Enter** on your keyboard or **click outside** of the data grid.

1. An **Update** message box will pop up, asking;
  - **Are you sure you want to save changes to this code?**
2. Click on **Yes**.



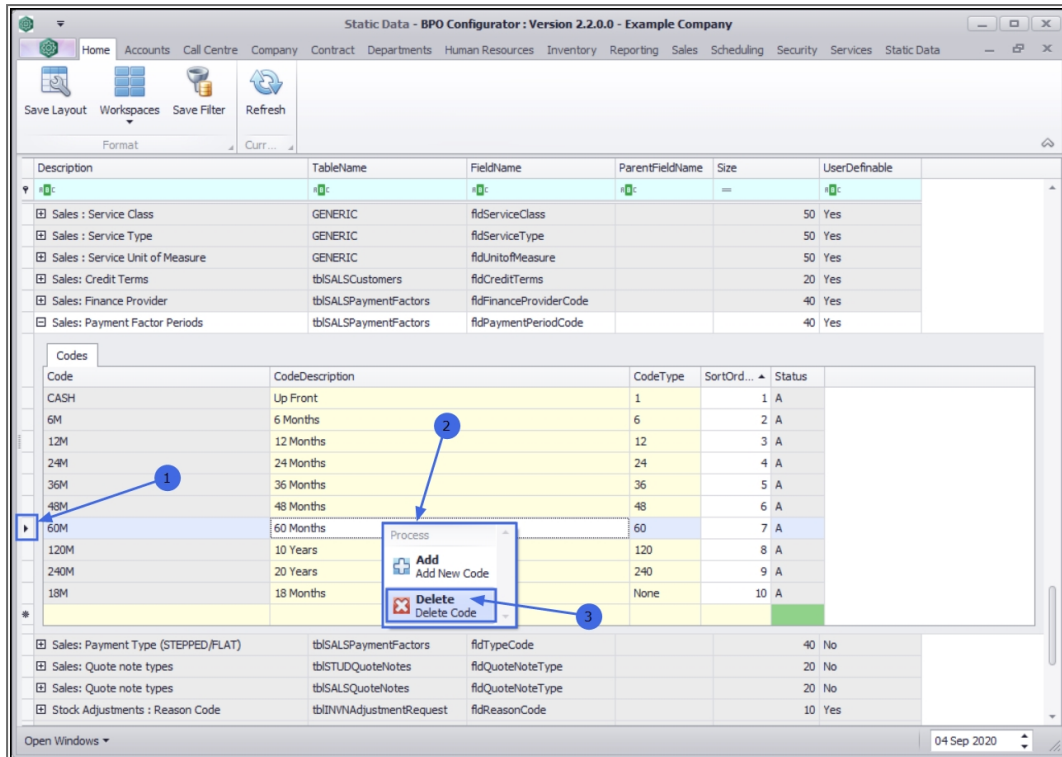


1. The new Payment Factor Period details will be **saved**.
2. A **new row** will be added to the **Codes** data grid.

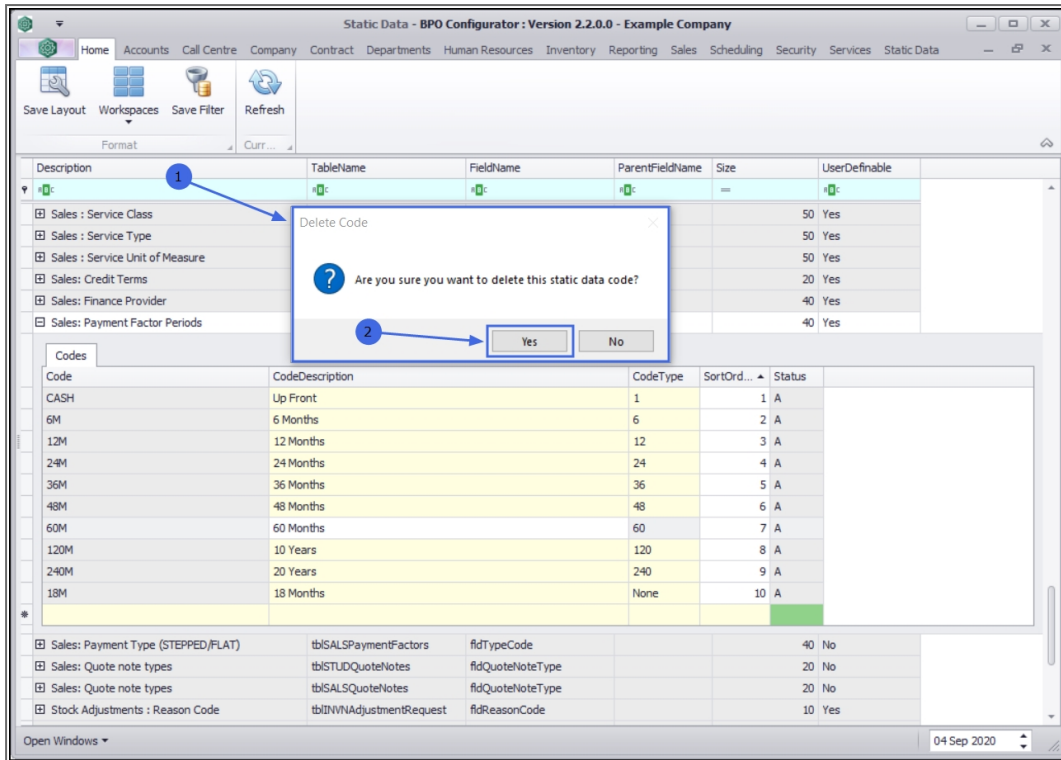


## DELETE A PAYMENT FACTOR PERIOD

1. **Select** and **right click** in the row of the Payment Factor Period that you wish to delete.
2. The **Process** menu will pop up.
3. Click on **Delete: Delete Code**.



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



1. The selected Payment Factor Period will be **removed** from the data grid.
2. When you have finished working in the Codes frame, **collapse** the data grid and
3. **Close** the screen.



CO3 Technologies (Pty) Ltd

FEEDBACK



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Status: .....

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Software Version: .....

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Date: .....



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