

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

SALES STUDIO CONFIGURATION

VIEW PAYMENT FACTORS

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 of these payment options will print on a new page, as if each 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 **view** the Payment Factors set up in the system.

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





PAYMENT FACTORS LISTING SCREEN - INTERFACE

- 1. The Payment Factors listing screen will open.
- 2. This screen contains a data grid of <u>all</u> the Payment Factors currently set up on the system.

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3. There is only **1** Processing button in this screen: **Delete**, which will be covered in the <u>Delete Payment Factors</u> manual.



GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:



- 1. Format:
- Save Layout
- Workspaces
- <u>Save Filter</u>
- 2. Current:
 - **Refresh**: Clicking on this button will update the currently displayed page.
- 3. Open Windows:
 - Open Windows
- 4. Data Grids:
 - Refer to <u>Using BPO Data Grids</u> and <u>Data Grid Filtering</u> for further information regarding data grid functionality that can be utilised here.

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VIEW CURRENT PAYMENT FACTORS

1. The Payment Factor records have the following fields:



- Payment Factor: This is the factor used to calculate the monthly repayments.
- ° Effective Date: The date from which the factor applies.
- ° End Date: The date when the factor expires.
- Finance Provider Code: Finance Providers configured in BPO Static Data.
- Description: User-friendly description of the Finance Provider Code.
- Payment Period Code: Payment Periods configured in BPO Static Data.
- **Type Code**: <u>Payment Types</u> configured in BPO Static Data.
- Escalation Percentage: The Escalation percentage amount to be applied with the Payment Factor.

EXIT THE PAYMENT FACTORS LISTING SCREEN

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2. Exit the Payment Factors listing screen when you are done.



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