

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

SALES STUDIO CONFIGURATION

ADD 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.

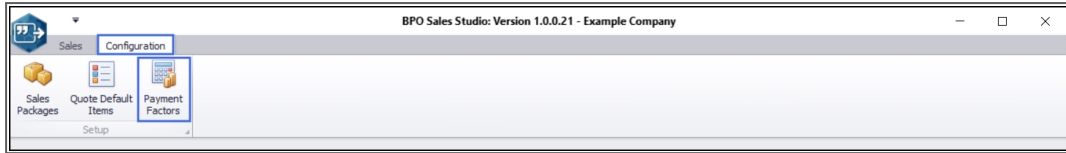
Adding an item to a quote also adds item price options for each quote Payment Option and if more options are added corresponding item price options are automatically added based on the Payment Option's default Payment Factor.

Follow the process set out below to **add** a Payment Factor.

Version Compatibility

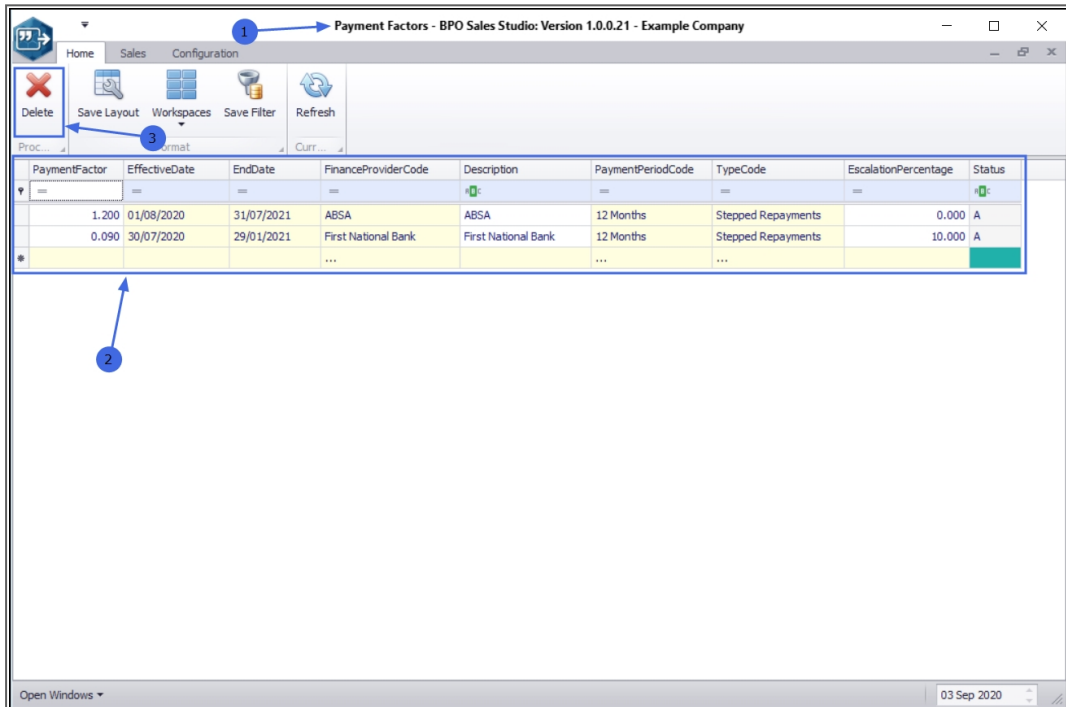
- BPO2 v 2.3.0.2
- Sales Studio v 1.0.0.21
- Configurator v 2.2.0.0
- CRM v 3.5.7.5

Ribbon Access: Sales Studio > Configuration > Payment Factors



PAYMENT FACTORS LISTING SCREEN – INTERFACE

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 a Payment Factor](#) manual.



GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:

1. Format:

- [Save Layout](#)
- [Workspaces](#)
- [Save Filter](#)

2. Current:

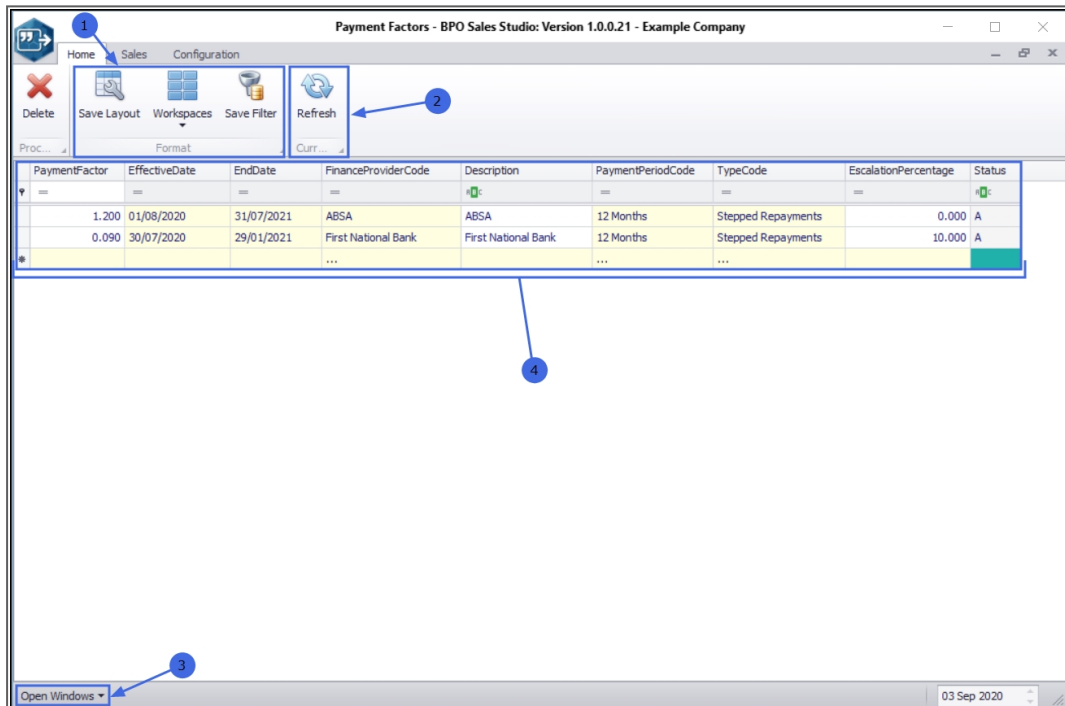
- Refresh: Clicking on this button will update the currently displayed page.

3. Open Windows:

- [Open Windows](#)

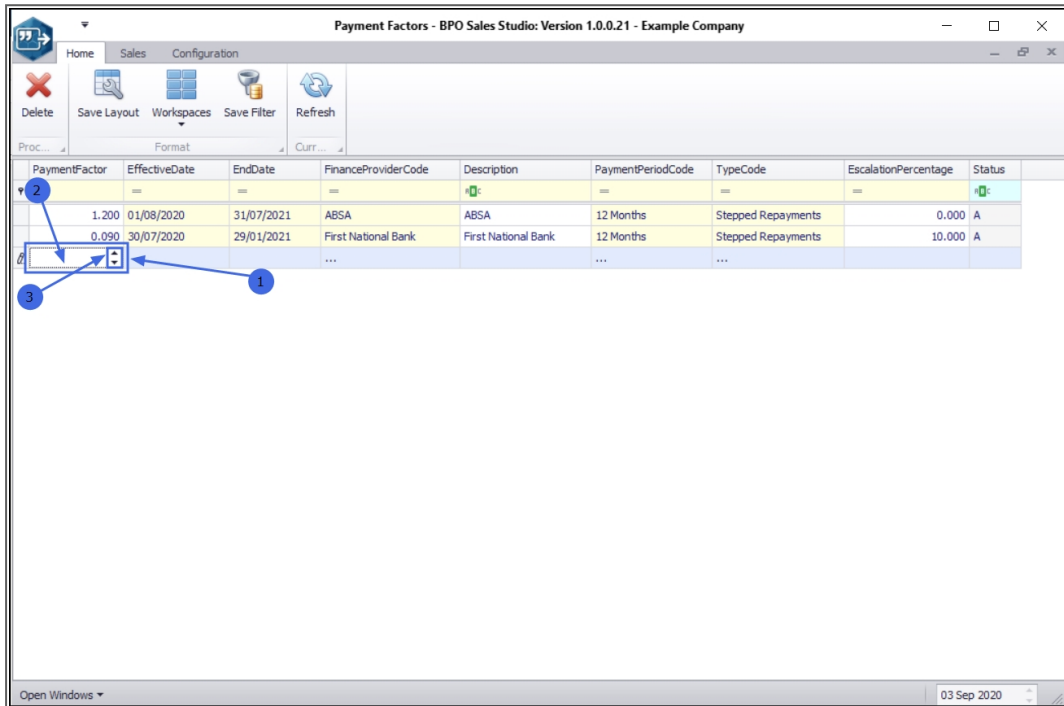
4. Data Grids:

- Refer to [Using BPO Data Grids](#) and [Data Grid Filtering](#) for further information regarding data grid functionality that can be utilised here.



ADD A NEW PAYMENT FACTOR

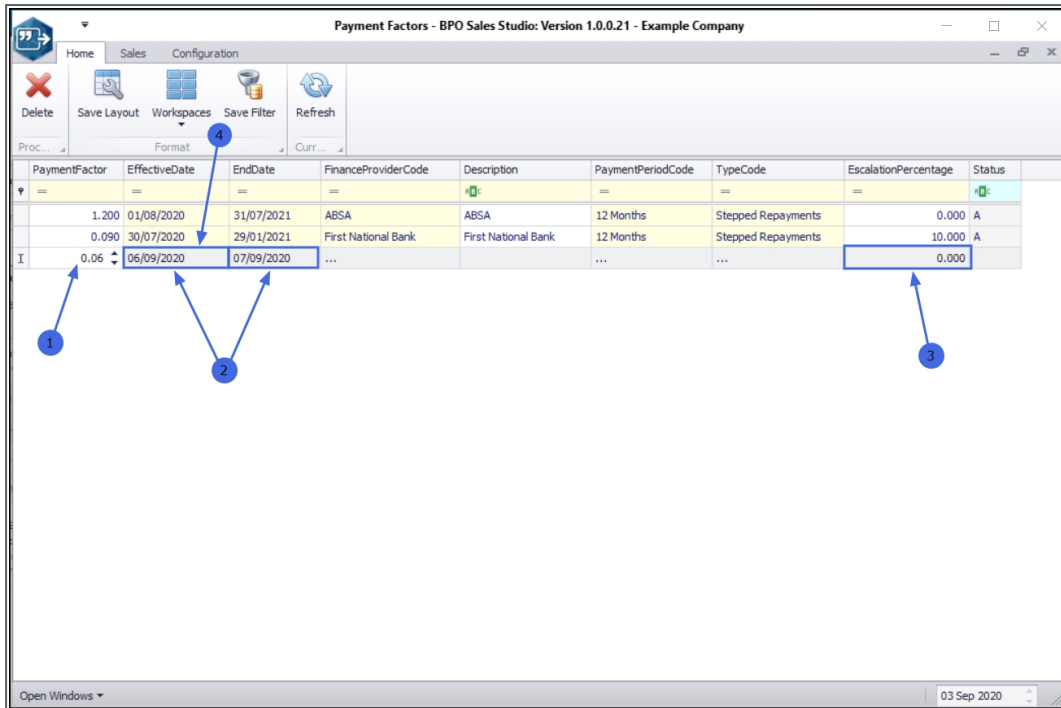
1. Click in the **final row** of the Payment Factor column. The field will be 'activated'.
2. Either **type in** the required Payment Factor figure, or
3. Use the **directional arrows**, to select the Payment Factor figure.



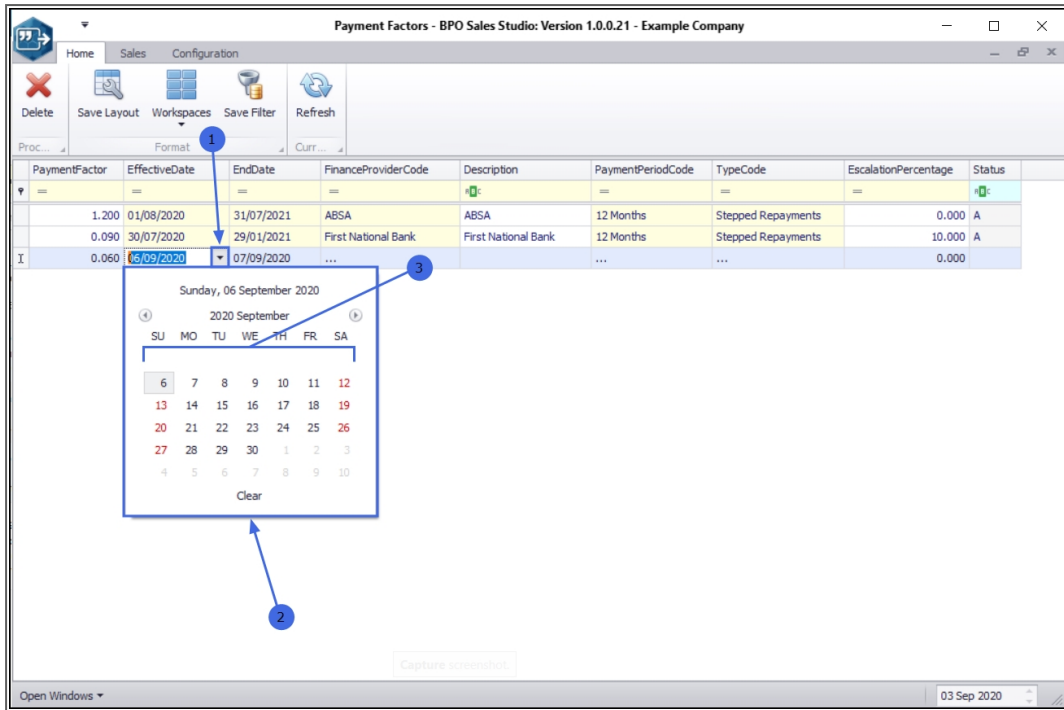
PaymentFactor	EffectiveDate	EndDate	FinanceProviderCode	Description	PaymentPeriodCode	TypeCode	EscalationPercentage	Status
1.200	01/08/2020	31/07/2021	ABSA	ABSA	12 Months	Stepped Repayments	0.000	A
0.090	30/07/2020	29/01/2021	First National Bank	First National Bank	12 Months	Stepped Repayments	10.000	A
				

EFFECTIVE DATE AND END DATE

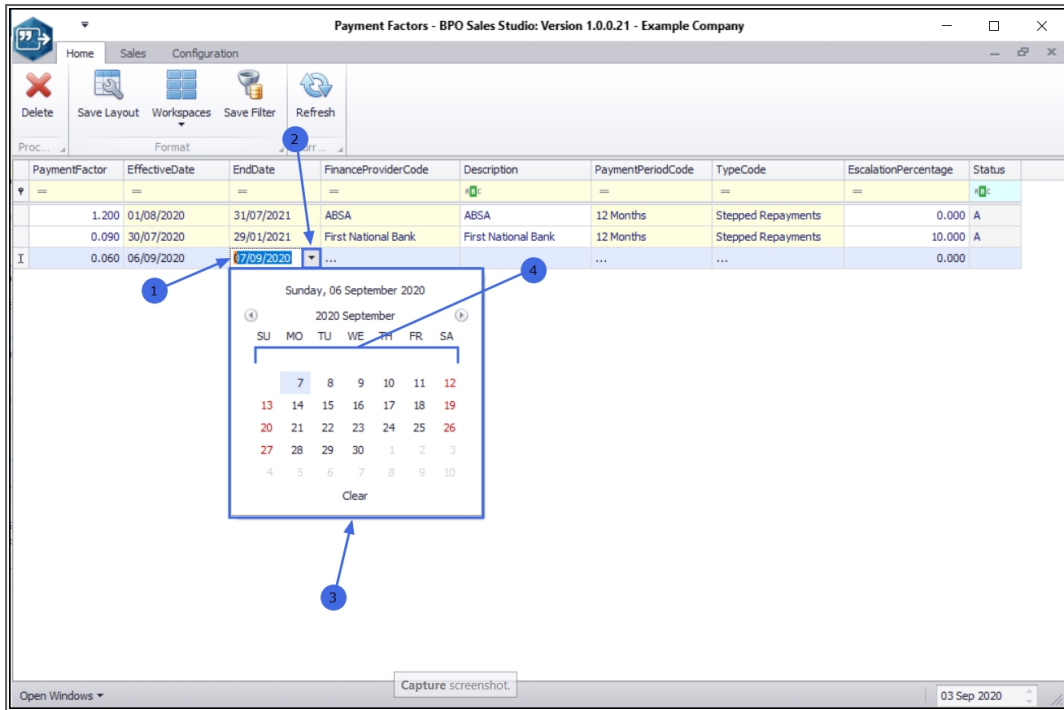
1. As you start editing the Payment Factor field, the following fields will auto populate:
2. **Effective Date** (start date), **End Date** and
3. **Escalation Percentage**
4. Click in the **Effective Date** field.



1. A drop-down **arrow** will appear. Click on this arrow to display,
2. the **Calendar** function
3. You will note that you cannot select dates prior to the current date, but you can select the current date or a future Effective Date.

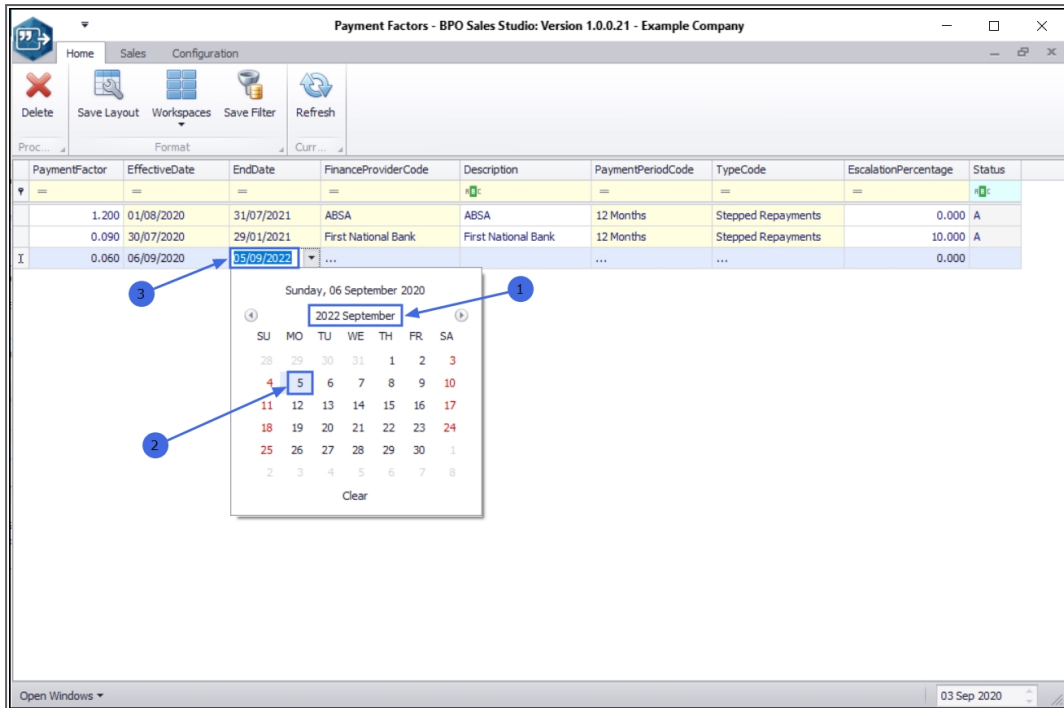


1. Click in the **End Date** field.
2. A drop-down **arrow** will appear. Click on this arrow to display
3. the **Calendar** function
4. You will note that you cannot select either the current date or dates prior to the current date, but you can select a future End Date.



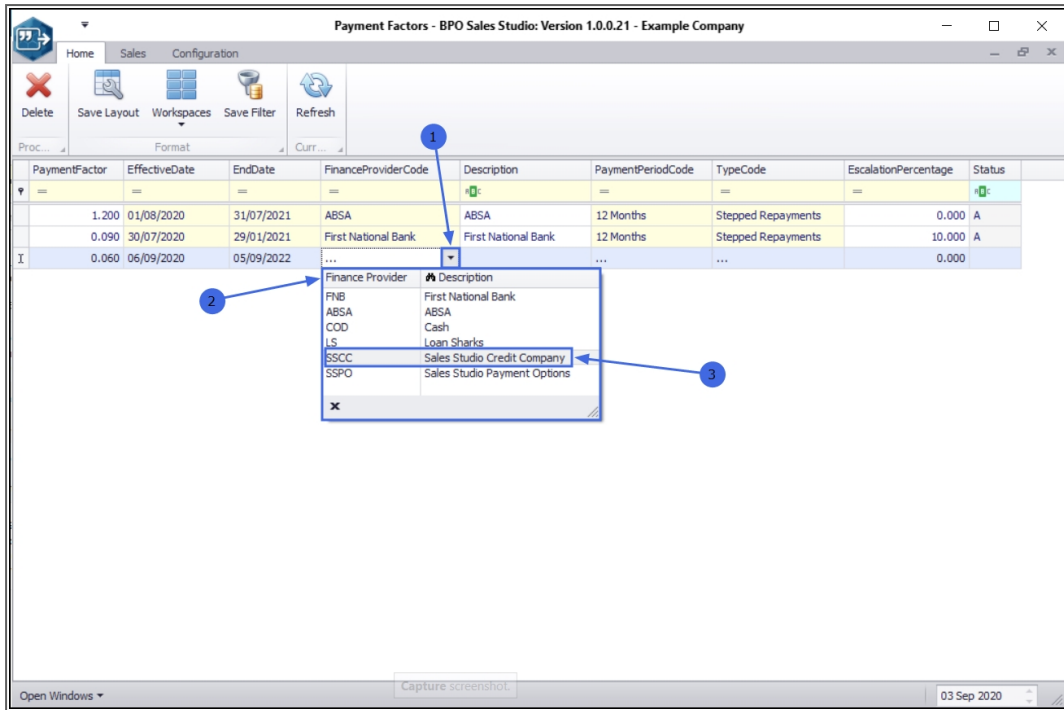
In this scenario, the End Date will usually be several months ahead of the Effective Date so the

1. **Year, Month** and
2. **Day** have been edited to make the End Date,
3. **24 months** from the Effective Date.



FINANCE PROVIDER CODE AND DESCRIPTION

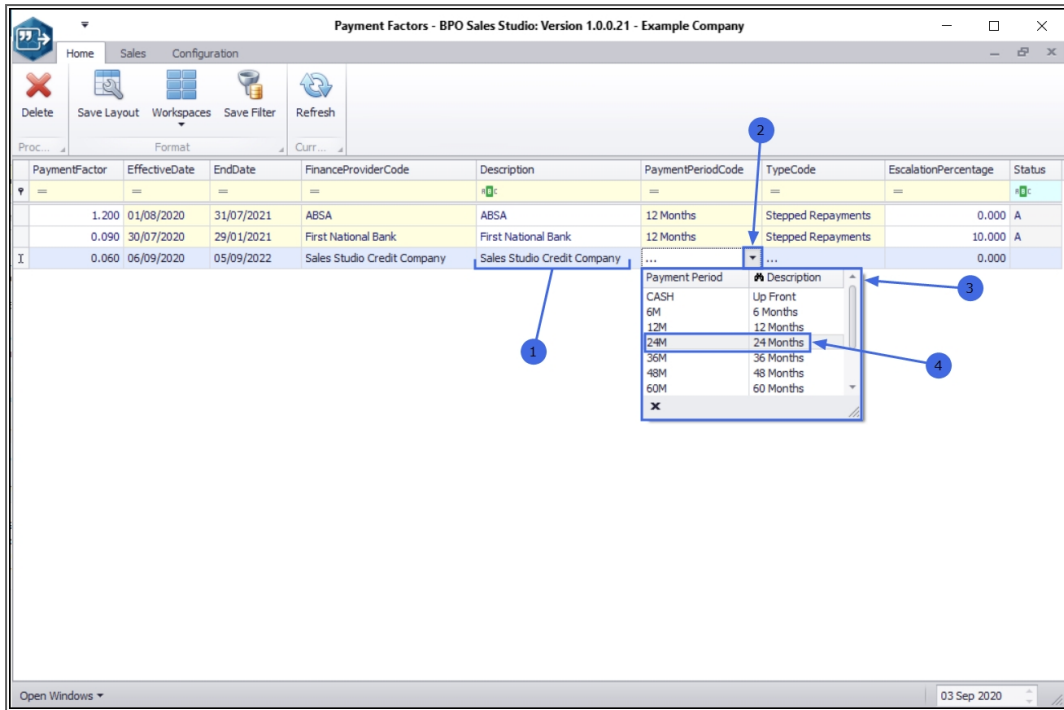
1. Click in the **Finance Provider Code** field to reveal a drop-down **arrow**.
2. Click on this arrow to display the Finance Provider Codes drop-down **list**. (The contents of this list will have been set up in your system [Con-figurator](#).)
3. Select the required Provider from the list.



1. The Finance Provider Code **Description** will auto populate as the Code is selected.

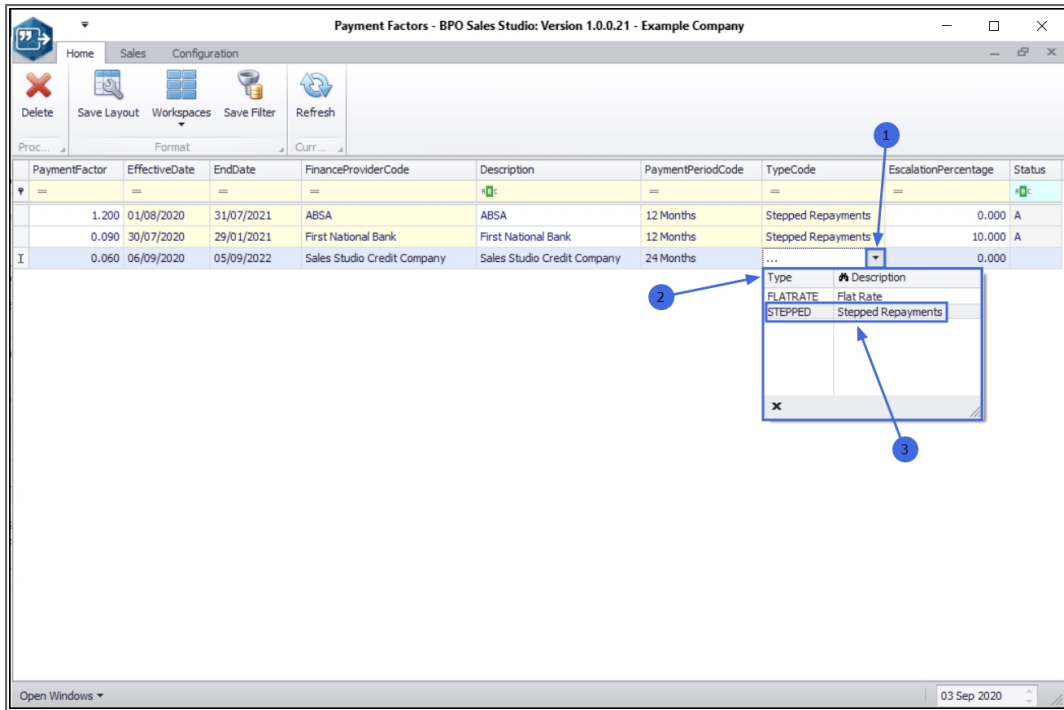
PAYMENT PERIOD CODE

2. Click in the **Payment Period Code** field to reveal a drop-down **arrow**.
3. Click on this arrow to display the Payment Period Code drop-down **list**.
(The contents of this list will have been set up in your system [Configurator](#).)
4. **Select** the required Period from the list.



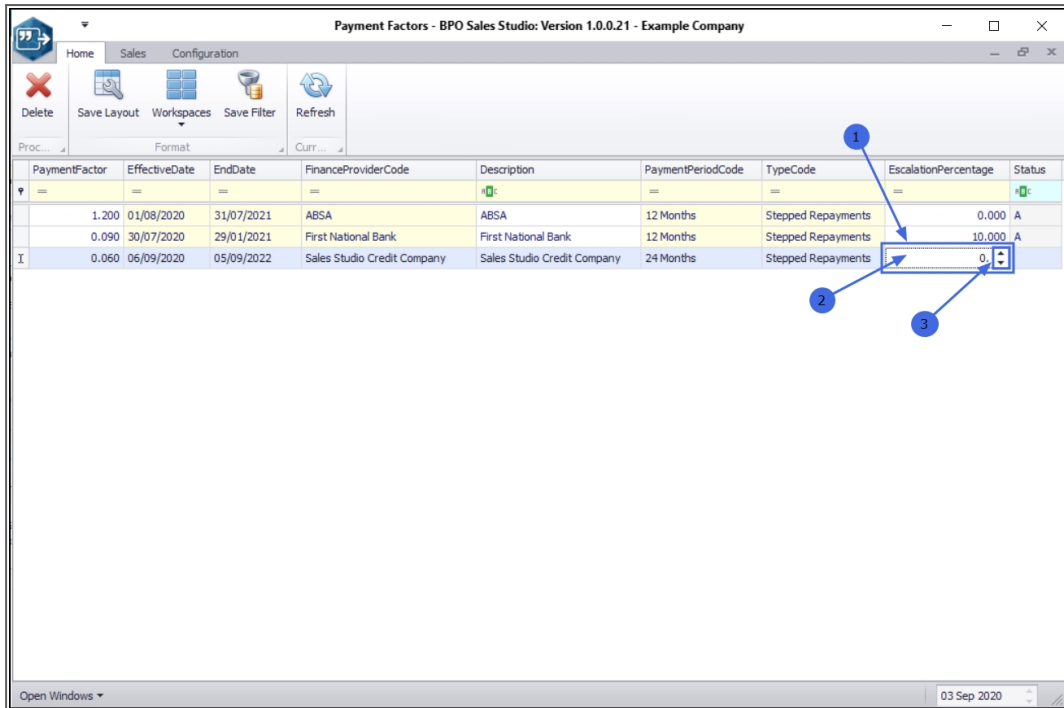
TYPE CODE

1. Click in the **Type Code** field to reveal a drop-down arrow.
2. Click on this arrow to display the Type Codes drop-down **list**. (The contents of this list will have been set up in your system [Configurator](#).)
3. Select the required Type from the list.



ESCALATION PERCENTAGE

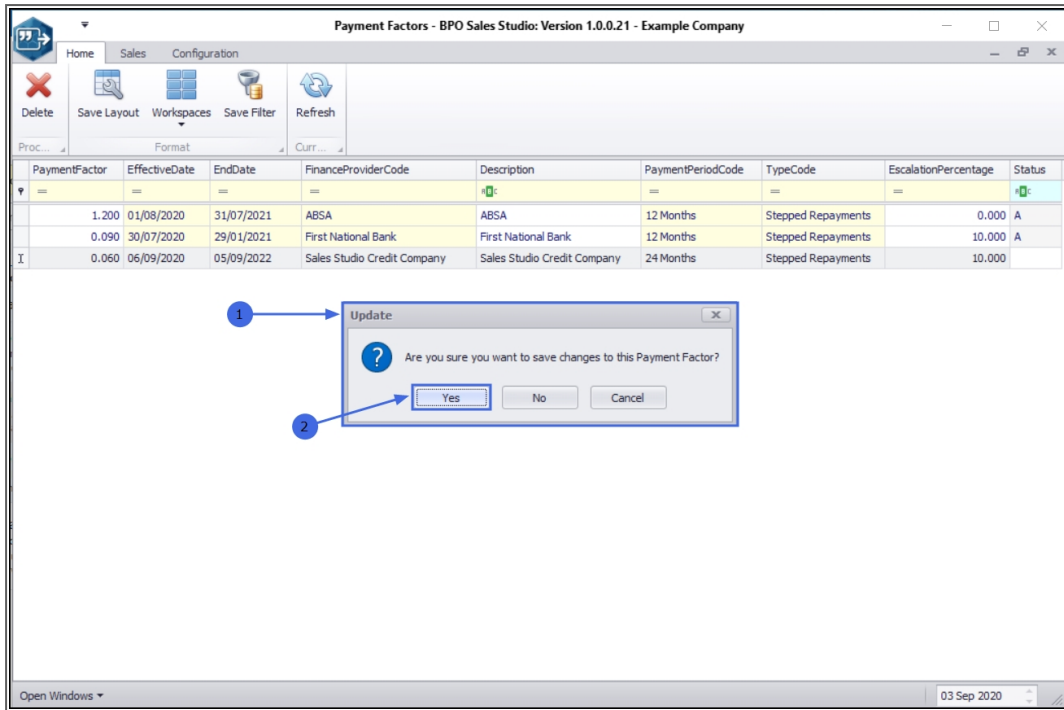
1. Click in the **Escalation Percentage** field and either,
2. **Type in** or,
3. Use the **directional arrows**, to select the Escalation Percentage amount.



SAVE THE NEW PAYMENT FACTOR

When you have finished adding the new Payment Factor 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 Payment Factor?**
2. Click on **Yes**.



1. The new Payment Factor details will be **saved**.
2. The **Status** column will now display as **A** (Active).
3. A **new row** will be added to the data grid.
4. **Close** the screen when you are done.

PaymentFactor	EffectiveDate	EndDate	FinanceProviderCode	Description	PaymentPeriodCode	TypeCode	EscalationPercentage	Status
1.200	01/08/2020	31/07/2021	ABSA	ABSA	12 Months	Stepped Repayments	0.000	A
0.090	30/07/2020	29/01/2021	First National Bank	First National Bank	12 Months	Stepped Repayments	10.000	A
0.060	06/09/2020	05/09/2022	Sales Studio Credit Company	Sales Studio Credit Company	24 Months	Stepped Repayments	10.000	A

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