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*
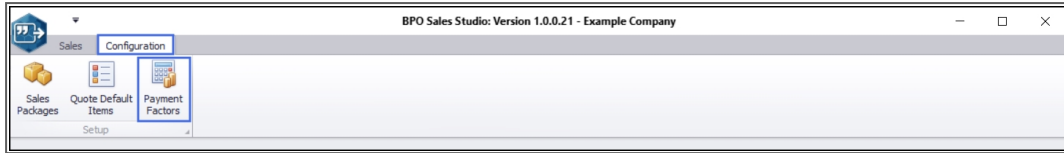
PAYMENT FACTORS LISTING SCREEN – INTERFACE

1. The *Payment Factors* listing screen will open.
2. This screen contains a data grid of 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 Payment Factors manual.
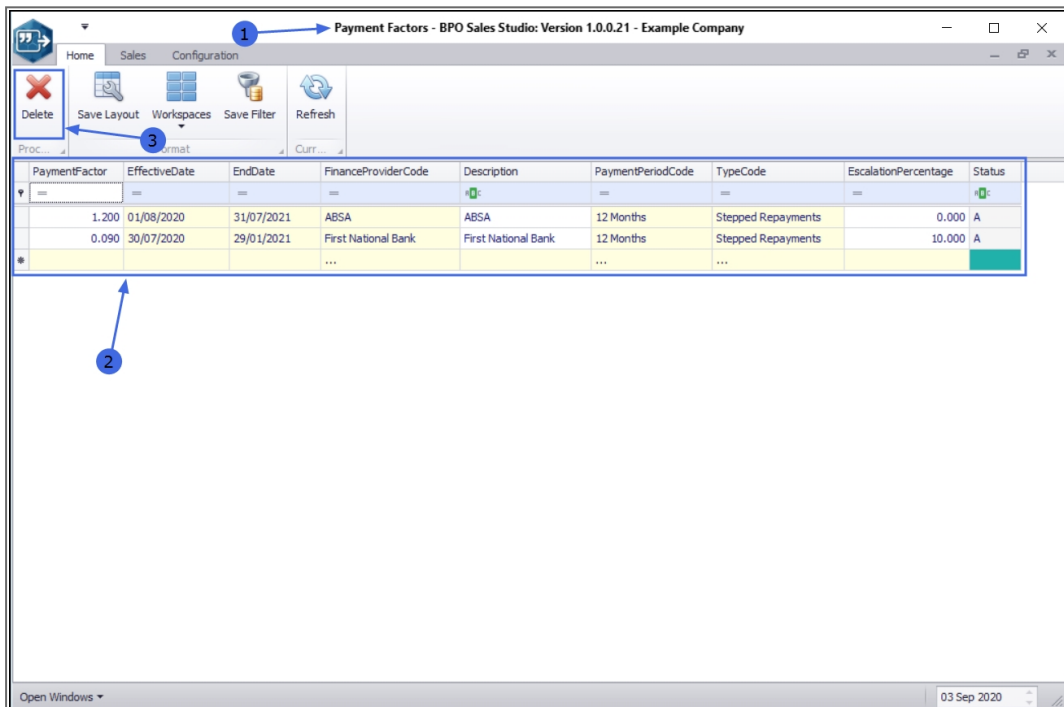
GENERAL BPO2 INTERFACE FUNCTIONALITY

The following basic BPO2 functionality applies in this screen:

1. **Format**:
   - [Save Layout](#)
   - [Workspaces](#)
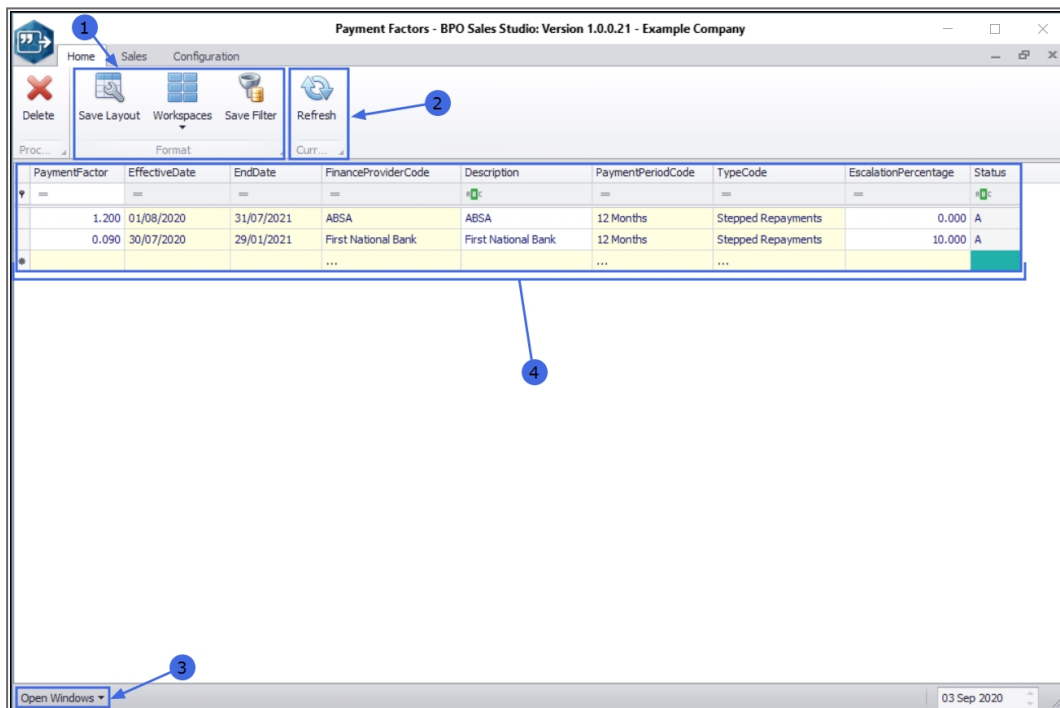   - [Save Filter](#)

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.
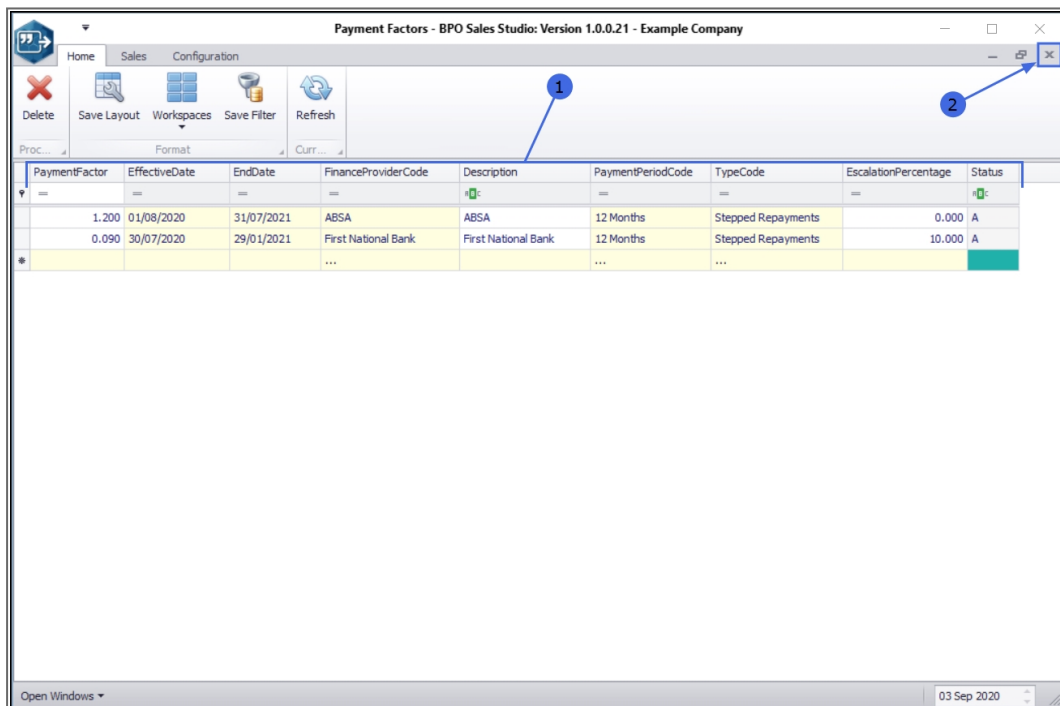

VIEW CURRENT PAYMENT FACTORS

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**: Payment Types configured in BPO Static Data.
- ○ **Escalation Percentage**: The Escalation percentage amount to be applied with the Payment Factor.

EXIT THE PAYMENT FACTORS LISTING SCREEN

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

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