

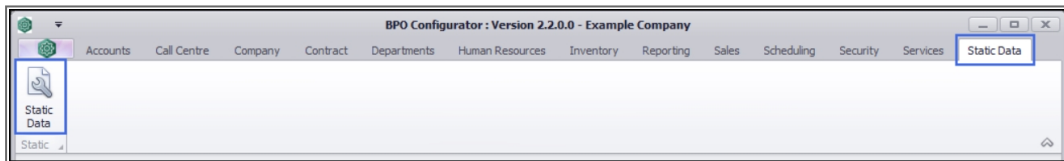
We are currently updating our site; thank you for your patience.

STATIC DATA

STATIC DATA – SALES: FINANCE PROVIDER

In the case of BPO, a Finance Provider will supply funds for business activities, such as making purchases for goods and services. These financial institutions, such as banks, will lend capital to your customers to help purchase your products (possibly out of their immediate reach). There will be an agreement to pay back the loan to these Providers, with interest, in a certain period of time.

Ribbon Access: Configurator > Static Data > Static Data



FIND THE FINANCE PROVIDER 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: Finance Provider** row.
4. Click on the **expand** icon in this row.

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 : Quote detail types	tblSALSQuotesDetails	fldQuoteDetailType		50	Yes
[-] Sales : Quote payment terms	tblSALSQuoteConfig	fldQuoteTermsCode		10	Yes
[-] Sales : Quote Status	tblSALSQuotes	fldQuoteStatus		50	Yes
[-] Sales : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes
[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tblASMTTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tblASMTTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect : General Settings	GENERIC	fldTECHSettings		40	Yes
[-] Warranties : Warranty Type	tblWARRWarranty	fldType		10	Yes
[-] Work Orders : Class	tblWKORWorkOrder	fldWOCClass		50	Yes
[-] Work Orders : Rectification Codes	tblWKORWorkSchedule	fldRectificationCode		10	Yes
[-] Work Orders : Type	tblWKORWorkOrder	fldWOTType		50	Yes
[-] Work Orders : Work Order Status	tblWKORWorkOrder	fldStatus		1	No

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1. The Sales Finance Provider **Codes** frame will be expanded.
2. In this example, there are currently 5 Finance Provider codes set up on the system.

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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task: Day Of Week	tblASMTTaskSchedule	fldDayOfWeek		10	No
[-] Task: Week Of Month	tblASMTTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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ADD A FINANCE PROVIDER

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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales: Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A

Process

Add Add New Code

Delete Delete Code

Description	TableName	FieldName	ParentFieldName	Size	UserDefinable
[-] Sales: Payme	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales: Quote note types	tblISTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales: Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task: Day Of Week	tblASMNTaskSchedule	fldDayOfWeek		10	No
[-] Task: Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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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.

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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A
		None	0	A

[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tblASMNTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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1. **Code:** Click in this text box and type in a **code** specific for this new Finance Provider.
2. **Code Description:** Click in this text box and type in a **description** for this new Finance Provider 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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A
		None	0	A

[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tblASMNTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tblASMNTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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1. **Code Type:** This can remain as **None**.
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.

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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A
* SSCC	Sales Studio Credit Company	None	0	A

[-] Sales: Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales: Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales: Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales: Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task: Day Of Week	tblASMTTaskSchedule	fldDayOfWeek		10	No
[-] Task: Week Of Month	tblASMTTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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Note on Sort Order:

The sort order is the order in which this new Finance Provider Code will appear in the Finance Provider Codes drop-down list in BPO2. If each Code 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 Finance Providers 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
2. Or use the **arrow indicators** revealed, to select the sort order number for this new Finance Provider.

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[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A
SSCC	Sales Studio Credit Company	None	0	A

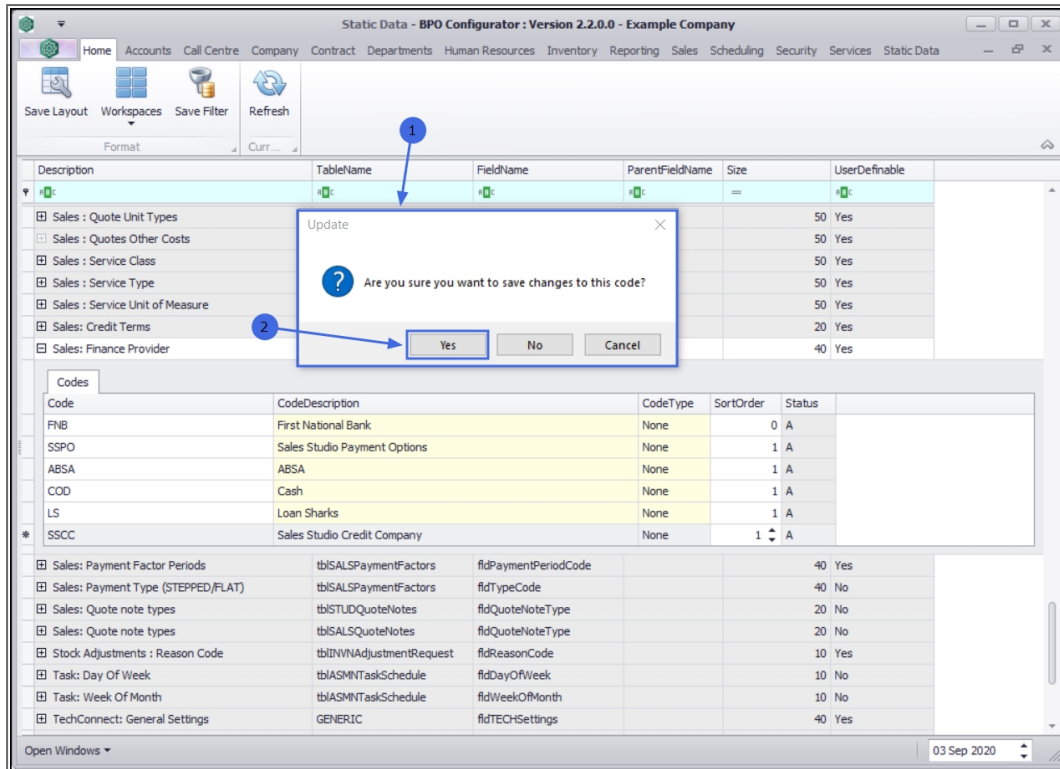
[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINWNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tblASMINTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tblASMINTaskSchedule	fldWeekOfMonth		10	No
[-] TechConnect: General Settings	GENERIC	fldTECHSettings		40	Yes

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SAVE FINANCE PROVIDER DETAILS

When you have finished adding the new Finance Provider 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 Finance Provider details will be **saved**.
2. A **new row** will be added to the **Codes** data grid.

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 : Quote Unit Types	tblSALSQuotesDetails	fldQuoteUnitType		50	Yes
[-] Sales : Quotes Other Costs	tblSALSQuotes	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	tblSALSCustomers	fldCreditTerms		20	Yes
[-] Sales : Finance Provider	tblSALSPaymentFactors	fldFinanceProviderCode		40	Yes

Codes

Code	CodeDescription	CodeType	SortOrder	Status
FNB	First National Bank	None	0	A
SSPO	Sales Studio Payment Options	None	1	A
ABSA	ABSA	None	1	A
COD	Cash	None	1	A
LS	Loan Sharks	None	1	A
SSCC	Sales Studio Credit Company	None	1	A

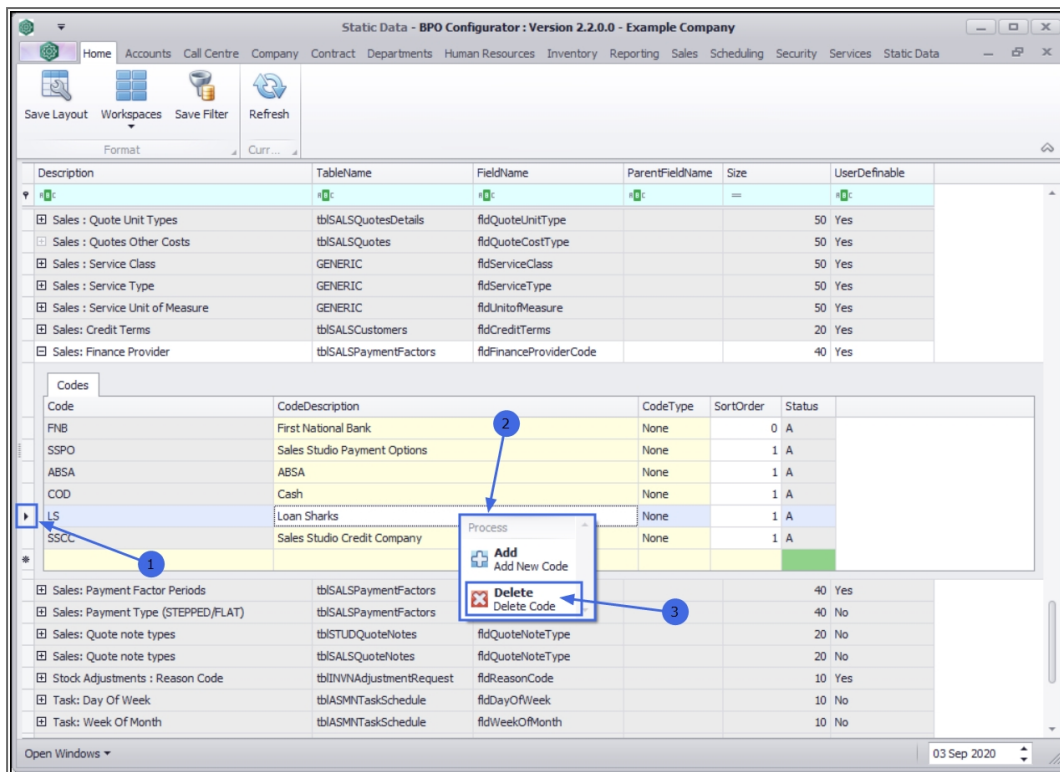
[-] Sales : Payment Factor Periods	tblSALSPaymentFactors	fldPaymentPeriodCode		40	Yes
[-] Sales : Payment Type (STEPPED/FLAT)	tblSALSPaymentFactors	fldTypeCode		40	No
[-] Sales : Quote note types	tblSTUDQuoteNotes	fldQuoteNoteType		20	No
[-] Sales : Quote note types	tblSALSQuoteNotes	fldQuoteNoteType		20	No
[-] Stock Adjustments : Reason Code	tblINNVNAdjustmentRequest	fldReasonCode		10	Yes
[-] Task : Day Of Week	tblASMINTaskSchedule	fldDayOfWeek		10	No
[-] Task : Week Of Month	tblASMINTaskSchedule	fldWeekOfMonth		10	No

Open Windows

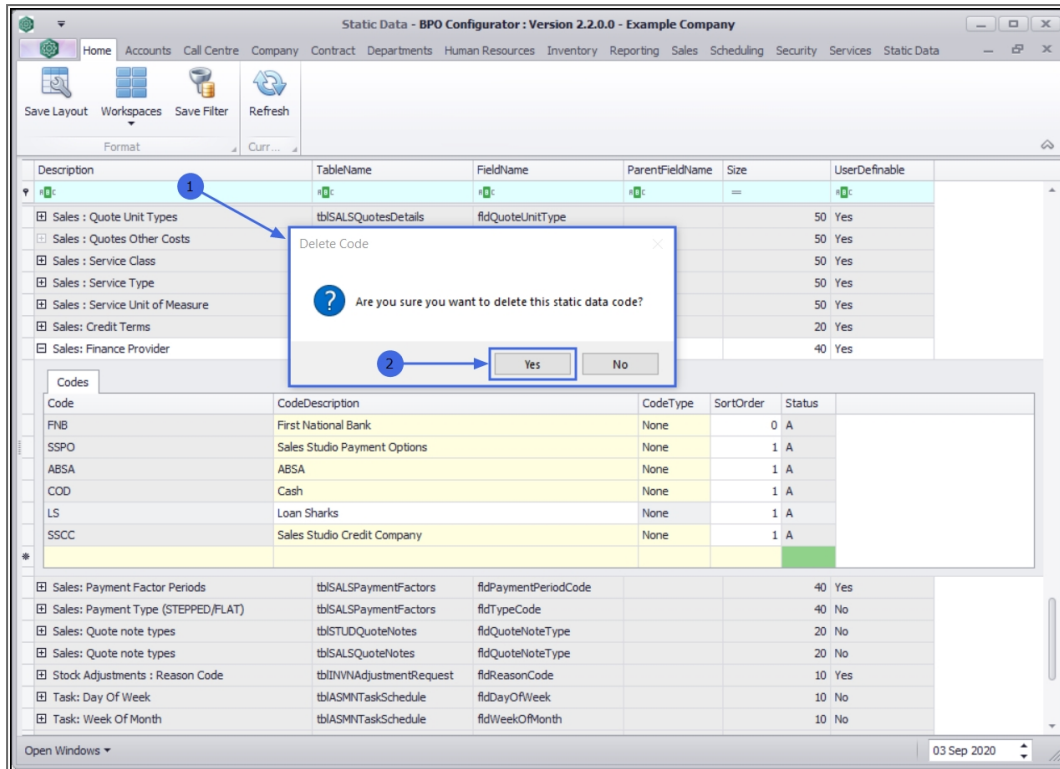
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DELETE A FINANCE PROVIDER

1. **Select** and **right click** in the row of the Finance Provider 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 Finance Provider 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.

MNU.108.052