

Contents

Overview	2
Extension Installation Steps	2
Extension Usage Steps	2
Extension Uninstallation Steps	4

Mortgage Calculator Extension for Zoho CRM

1. Overview

Using this extension, Zoho CRM customers can easily calculate the monthly payments and amortization table of mortgages within the Zoho CRM. This feature is available in all places of leads, contacts and deals modules. This User Manual document covers step-by-step instructions to install this extension from Zoho Marketplace and how to configure and use the extension functionality within your Zoho CRM account.

2. Extension Installation Steps

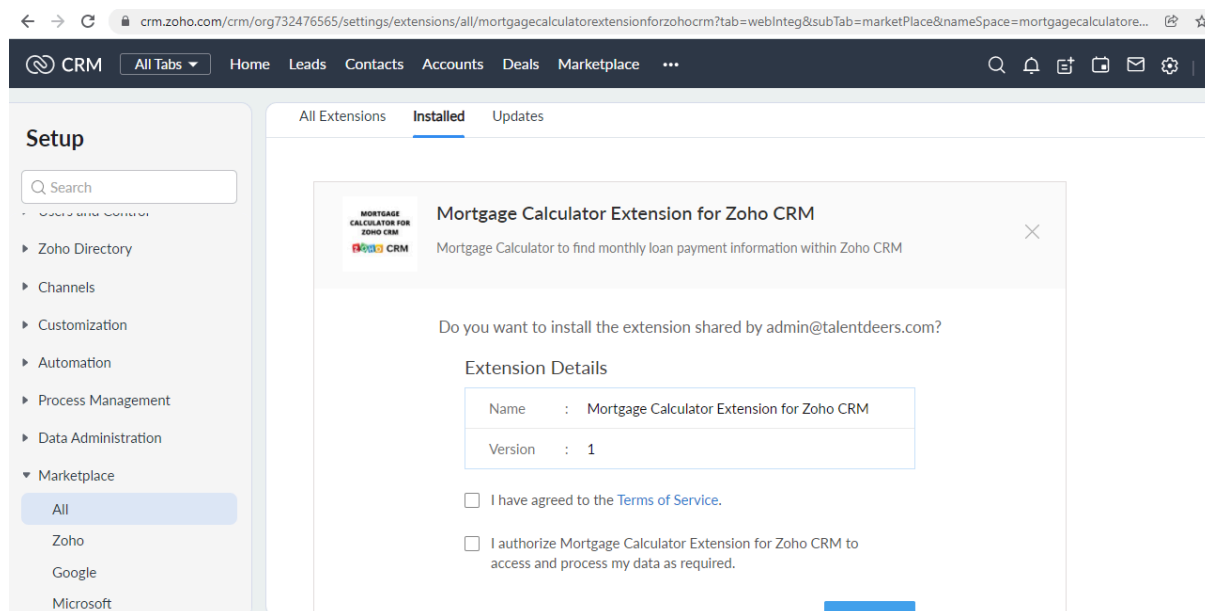
Go to Zoho Marketplace and search for “Mortgage Calculator Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Mortgage Calculator Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below installation steps.

To install the Mortgage Calculator Extension from Zoho CRM:

- ❑ Go to Setup -> Marketplace -> All. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed.
- ❑ Go to “All Extensions” tab to view all available Extensions.
- ❑ Click All Extensions, browse/search for “Mortgage Calculator Extension for Zoho CRM”.
- ❑ Click the Install button. Make sure you check the “Agree to the Terms of Service” checkbox and click Install.

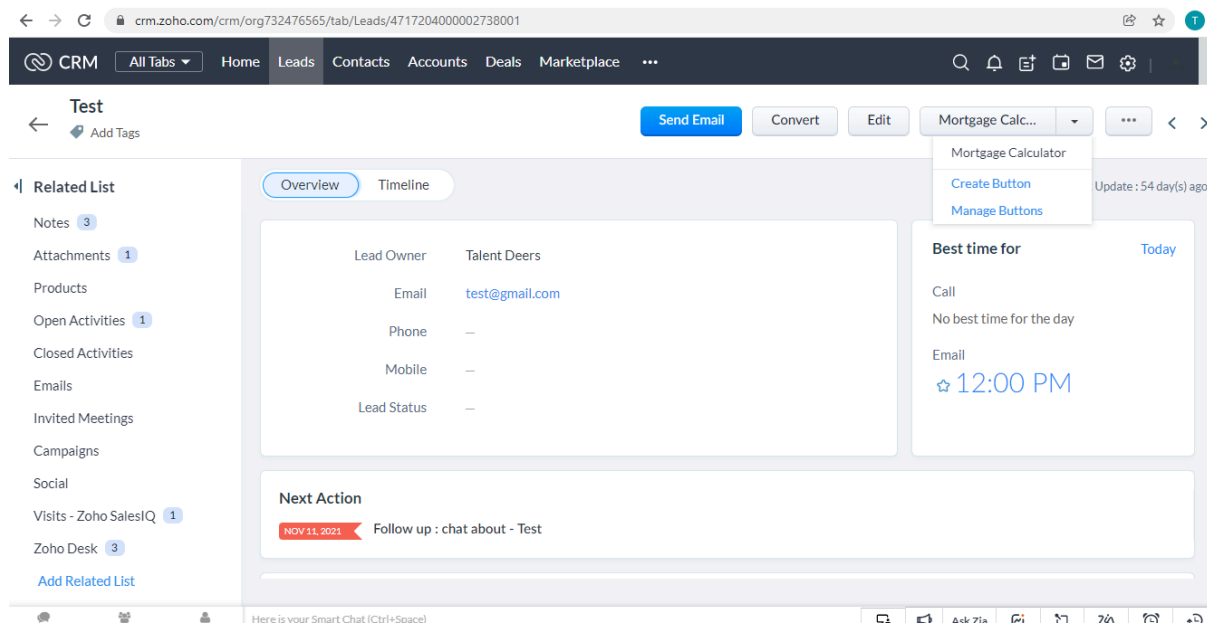
3. Extension Usage Steps

- Extension Installation Wizard



Mortgage Calculator Extension for Zoho CRM

- You can find the button “Mortgage Calculator” in the Leads, Contacts and Deals View page.



- Once you click the button, you can find the mortgage calculator as per below screenshot. After calculating the mortgage for the lead/contacts/deals, you can save the calculations using the “Save Calculation” button to the corresponding record.

A screenshot of the 'Mortgage Calculator' extension window. It has a title bar 'Mortgage Calculator' and a close button. The main content area is titled 'MORTGAGE CALCULATOR'. It contains several input fields: 'Currency' (USD), 'Total Value (USD)' (1400), 'Down Payment Amount (USD)' (200), 'Loan Amount (USD)' (1200), 'Loan Term (Month)' (12), and 'Interest Rate(%)' (10). Below these fields are 'Save Calculation' and 'Close' buttons. The results section shows: 'YOUR MONTHLY PAYMENT: USD 105.50', 'TOTAL INTEREST: USD 66.00', and 'TOTAL PAYMENT: USD 1,266.00'. At the bottom, there's an 'AMORTIZATION TABLE' section with a 'Download Amortization Table' link.

- Once you save the calculation, you can get the stored mortgage calculations inside the custom fields of the corresponding record. Please find the below screenshot.

Mortgage Calculator Extension for Zoho CRM

The screenshot shows the 'Edit Deal' form in Zoho CRM. The URL is crm.zoho.com/crm/org732476565/tab/Potentials/4717204000002979079/edit?layoutId=471720400000091023. The form includes fields for Deal Owner (Talent Deers), Deal Name (VIA), Account Name (Test), Next Step, Lead Source (-None-), Contact Name (Live Employee), Amount, Closing Date (Dec 31, 2021), Stage (Qualification), Probability (%) (10), Expected Revenue, Campaign Source, Total Value (\$1400), Down Payment (\$200), Loan Amount (\$1200), Loan Term (Months) (12), Interest Rate (%) (10), and Monthly Payment (\$105.5). A black box highlights the mortgage calculator fields: Total Value, Down Payment, Loan Amount, Loan Term, Interest Rate, and Monthly Payment.

- You can see the Amortization table after scrolling the page as per below screenshot. You can export the Amortization table as a CSV format using the “Download Amortization Table” button.

The screenshot shows the 'AMORTIZATION TABLE' in Zoho CRM. The URL is crm.zoho.com/crm/org732476565/tab/Leads/custom-view/471720400000087501/list. The table has a blue header bar with the text 'Download Amortization Table'. The table contains 10 rows of data, each representing a payment.

Payment#	Payment	Principal	Intrest	Remaining Principal
#1	USD 105.50	USD 95.50	USD 10.00	USD 1104.50
#2	USD 105.50	USD 96.29	USD 9.20	USD 1008.21
#3	USD 105.50	USD 97.10	USD 8.40	USD 911.11
#4	USD 105.50	USD 97.91	USD 7.59	USD 813.20
#5	USD 105.50	USD 98.72	USD 6.78	USD 714.48
#6	USD 105.50	USD 99.55	USD 5.95	USD 614.93
#7	USD 105.50	USD 100.37	USD 5.12	USD 514.56
#8	USD 105.50	USD 101.21	USD 4.29	USD 413.35
#9	USD 105.50	USD 102.05	USD 3.44	USD 311.29
#10	USD 105.50	USD 102.90	USD 2.59	USD 208.39

4. Extension Uninstallation Steps

Uninstalling this extension from Zoho CRM will delete all its associated data.

To uninstall “Mortgage Calculator Extension for Zoho CRM” Extension, please follow the below steps:

- Go to Setup -> Marketplace -> All -> Installed tab. All the installed Extensions will be listed.
- Browse for “Mortgage Calculator Extension for Zoho CRM” and click on Uninstall link.
- Click Okay to confirm in the confirmation pop-up that follows. The Extension will be uninstalled.