Contents

Overview 2

Extension Installation Steps 2

Extension Usage Steps 2

Extension Uninstallation Steps 4

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

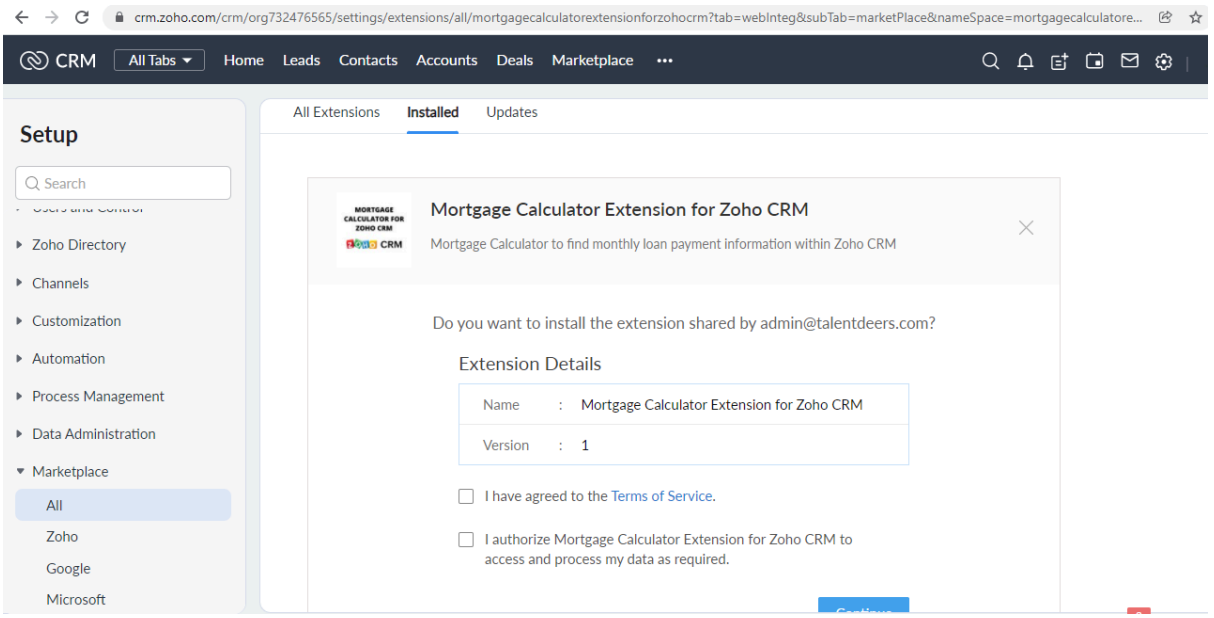
Go to Zoho Marketplace and search for “Mortgage Calculator Extension for Zoho CRM” to locate the extension and install directly from the Marketplace. Also, you can install the Mortgage Calculator Extension for Zoho CRM by logging in to your Zoho CRM account and follow the below installation steps.

To install the Mortgage Calculator Extension from Zoho CRM:

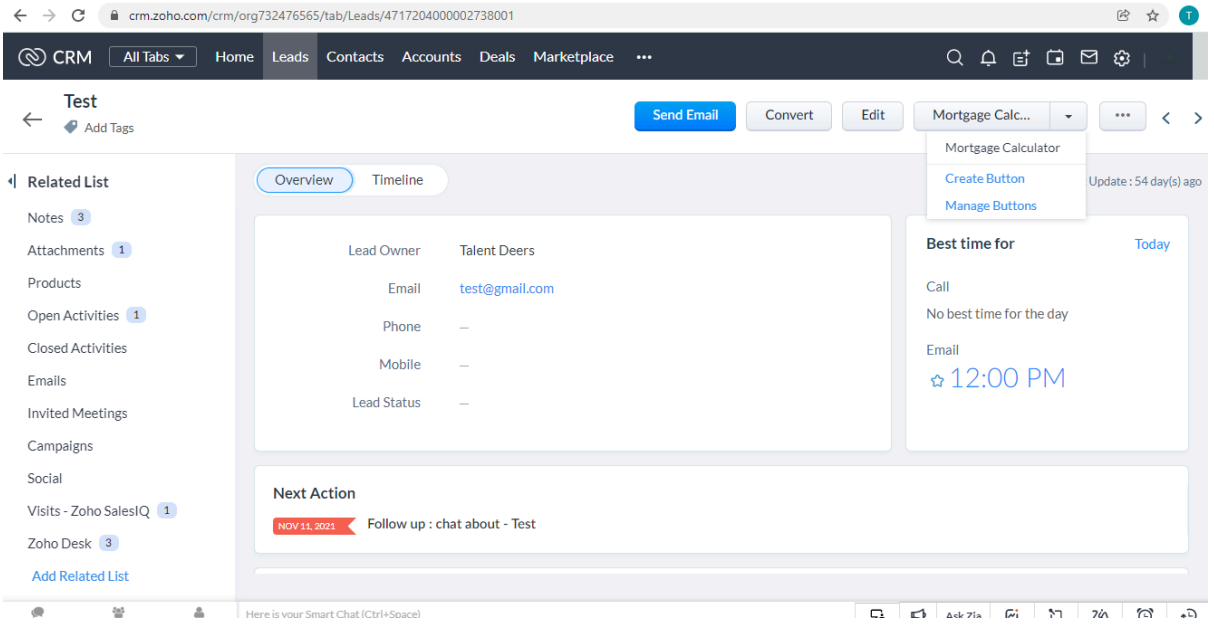
- Go to Setup -> Marketplace -> All. By default, all the Zoho Extensions currently installed within your Zoho CRM account are listed.
- Go to “All Extensions” tab to view all available Extensions.
- Click All Extensions, browse/search for “Mortgage Calculator Extension for Zoho CRM”.
- Click the Install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

3. Extension Usage Steps

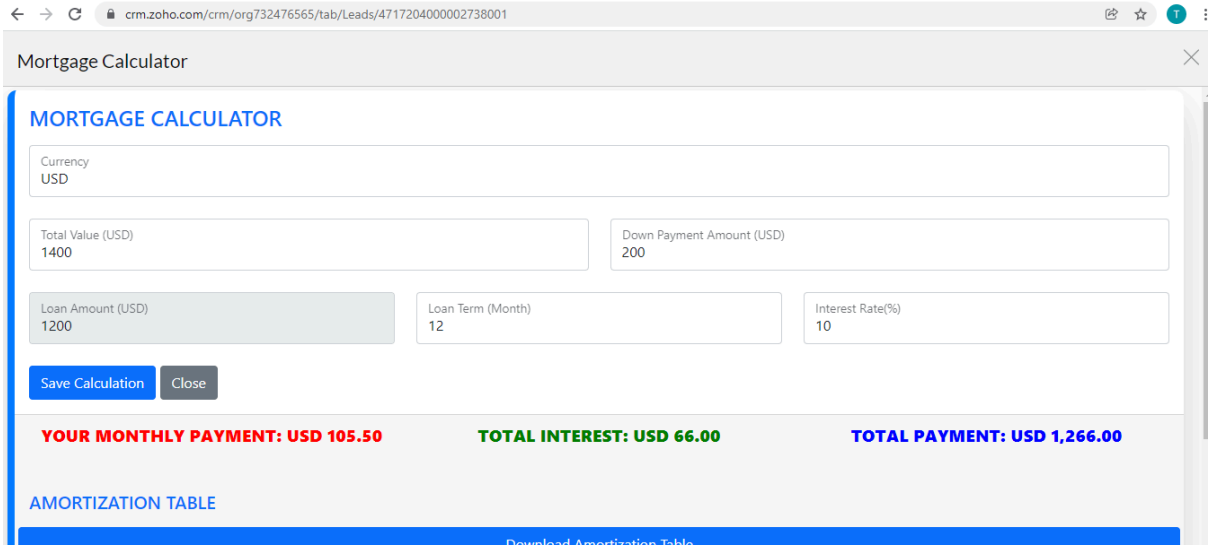
- Extension Installation Wizard



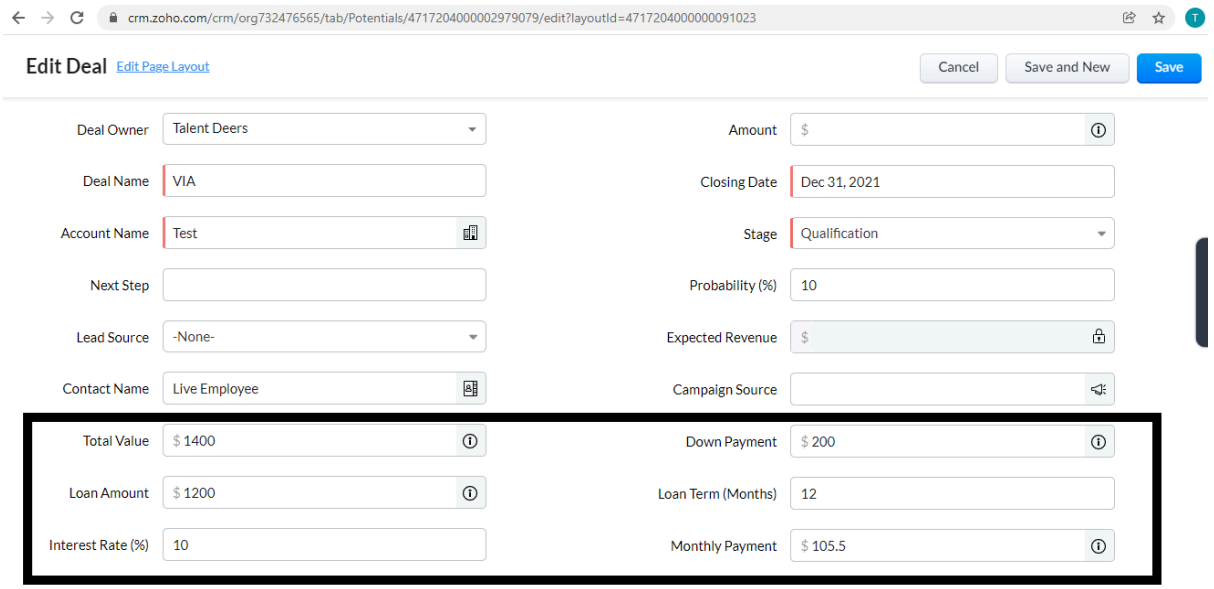
- You can find the button “Mortgage Calculator” in the Leads, Contacts and Deals View page.



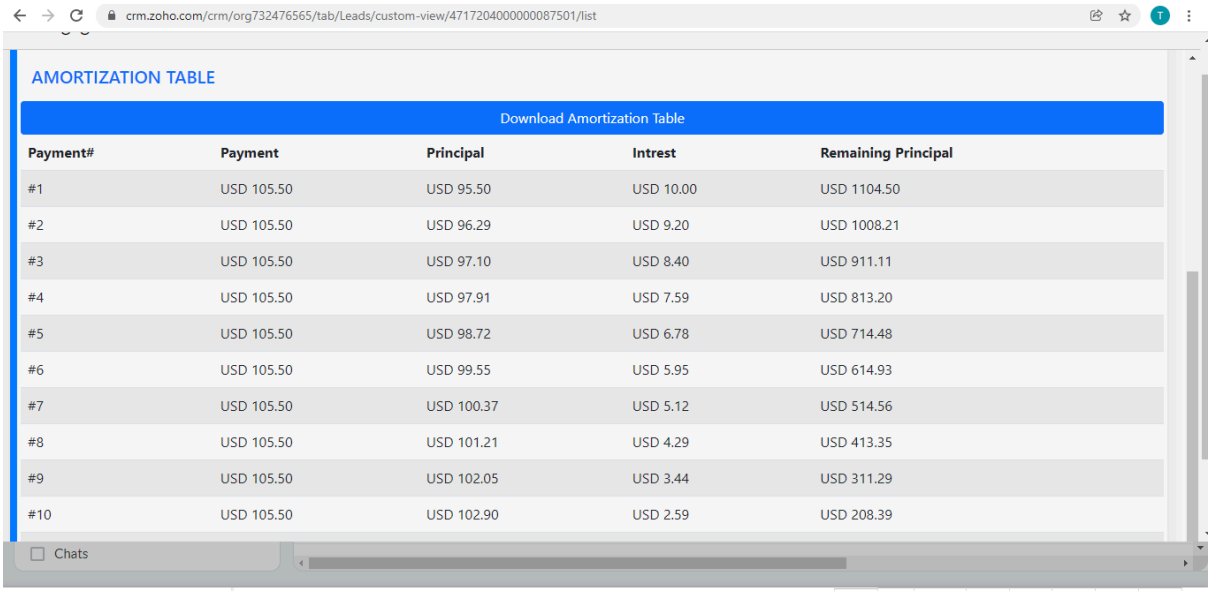
- Once you click the button, you can find the mortgage calculator as per below screenshot. After calculating the mortgage for the lead/contacts/deals, you can save the calculations using the “Save Calculation” button to the corresponding record.



- 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.



- 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.



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.