

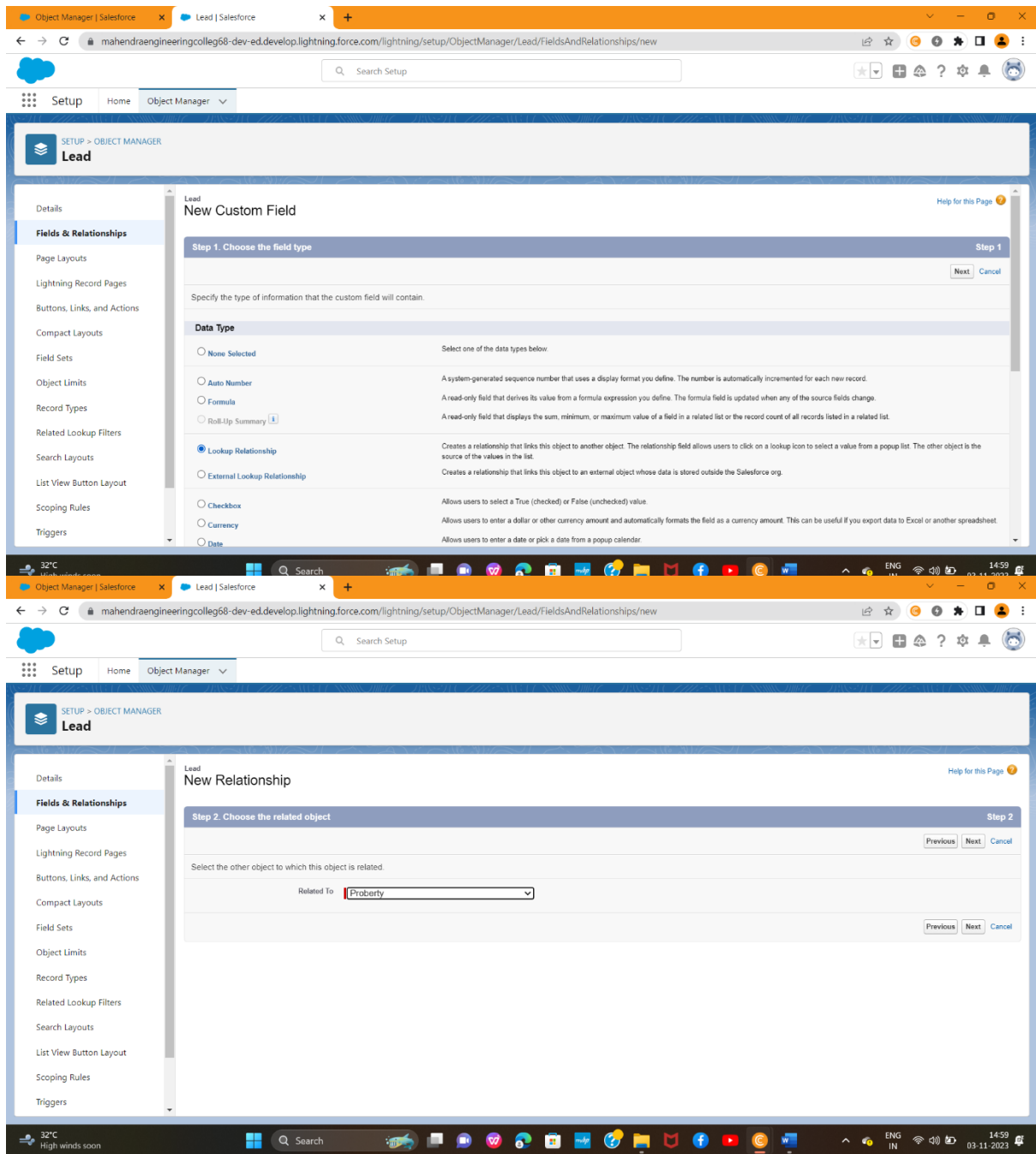
For Loan Object

Create the remaining Fields:

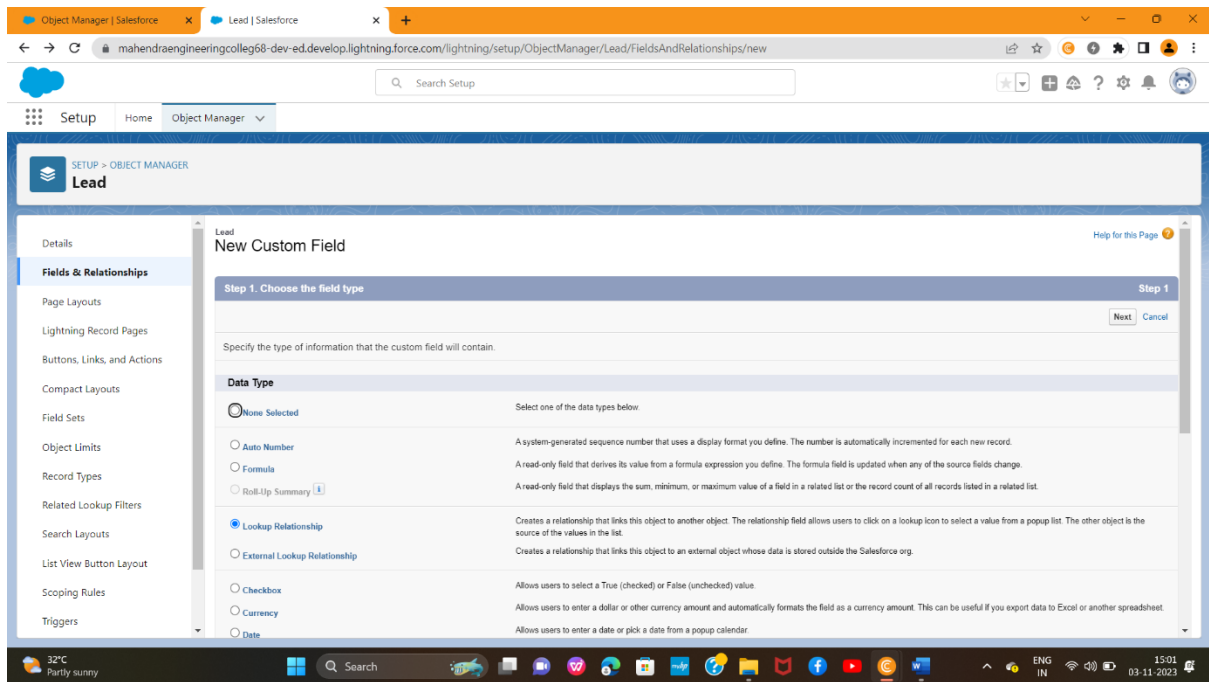
Follow the above activity 1 Steps 1 to 2, create the Field just change the Labels and data types for

Below Fields

1. Property name: (lookup relationship related to property)



2. Customer name: (lookup relationship related to Enquiry)



3. Interest Rate: (Select the Field Data Type As Currency)

The first screenshot shows the 'Lead' object page in the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Scoping Rules, and Triggers. The main content area is titled 'Specify the type of information that the custom field will contain' and lists various 'Data Type' options: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, Email, Geolocation, Number, and Percent. The 'Number' option is selected.

The second screenshot shows the 'New Custom Field' page for the 'Lead' object. The page is titled 'Step 2. Enter the details' and includes a 'Previous', 'Next', and 'Cancel' navigation bar. The 'Field Label' is 'Interest Rate'. The 'Length' is set to 18 and 'Decimal Places' is set to 0. The 'Field Name' is 'InterestRate' and the 'Description' is 'Number of digits to the left of the decimal point'. The 'Help Text' is 'Number of digits to the right of the decimal point'. The 'Required' checkbox is checked, and the 'Auto add to custom report type' checkbox is also checked. The 'Default Value' is 'Show Formula Editor'.

4. Term: (Select the Field Data type as Number)

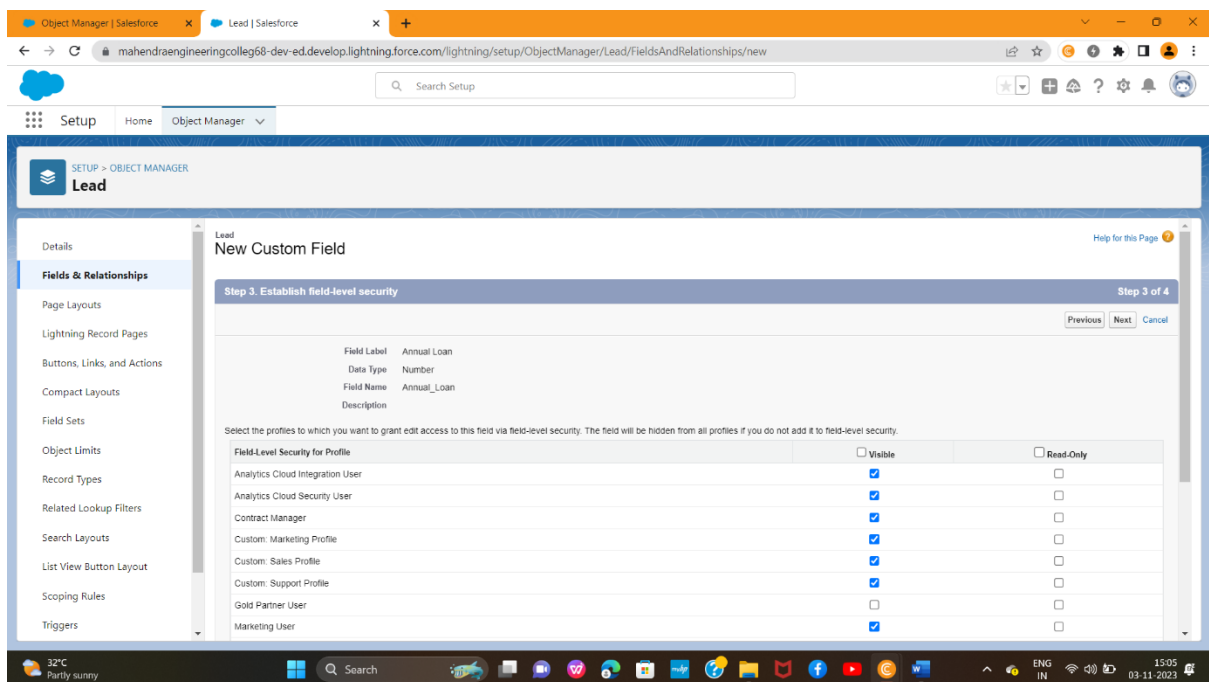
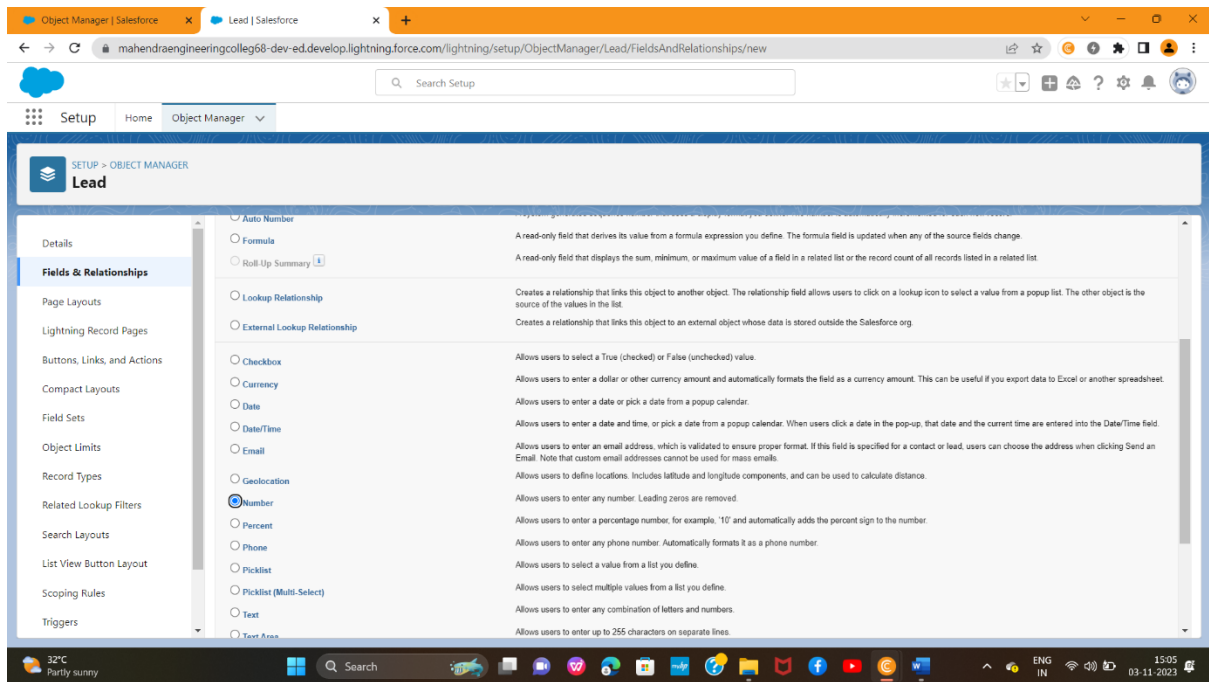
The image displays two screenshots of the Salesforce Setup interface, specifically the 'Lead' object page.

Top Screenshot: The 'Lead' object page is shown with the 'Fields & Relationships' section selected in the left sidebar. The main content area lists various field types and their descriptions:

- Auto Number:** A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Formula:** A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Roll-Up Summary:** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Lookup Relationship:** Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- External Lookup Relationship:** Allows users to select a True (checked) or False (unchecked) value.
- Checkbox:** Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Currency:** Allows users to enter a date or pick a date from a popup calendar.
- Date:** Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Date/Time:** Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Email:** Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Geolocation:** Allows users to enter any number. Leading zeros are removed.
- Number:** Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Percent:** Allows users to enter any phone number. Automatically formats it as a phone number.
- Phone:** Allows users to select a value from a list you define.
- Picklist:** Allows users to select multiple values from a list you define.
- Picklist (Multi-Select):** Allows users to enter any combination of letters and numbers.
- Text:** Allows users to enter up to 255 characters on separate lines.
- Text Area:** Allows users to enter up to 255 characters on separate lines.

Bottom Screenshot: The 'New Custom Field' wizard is shown, Step 2: Enter the details. The field label is 'Term'. The length is set to 18, and the decimal places are set to 0. The field name is 'Term', and the description is 'Term'. The help text is 'Term'. The 'Required' checkbox is checked, and the 'Unique' checkbox is checked. The 'External ID' checkbox is checked, and the 'AI Prediction' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked.

5. Annual Loan: Field create the Number as the field data type



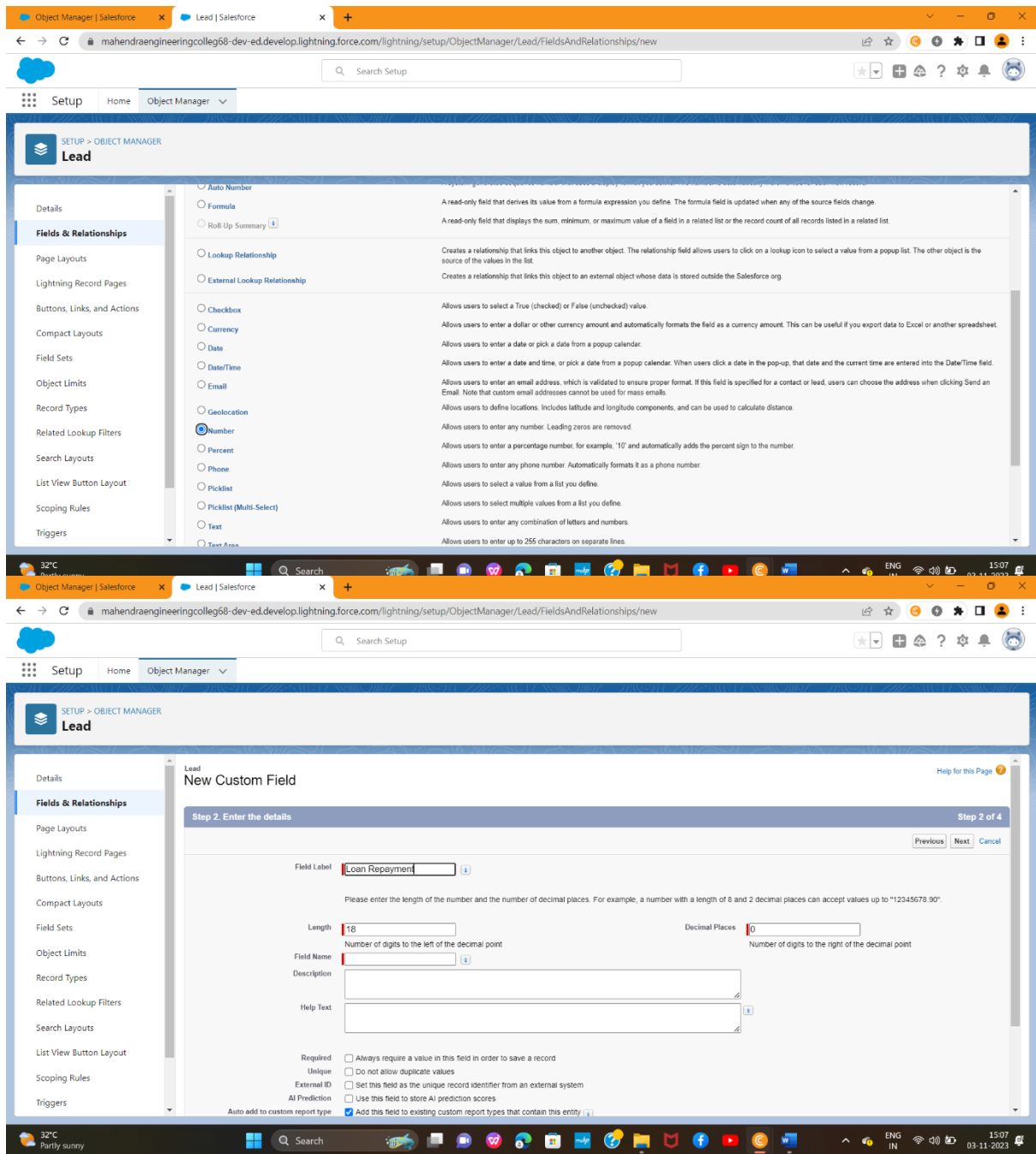
6. Total Loan Installments: (Field create the Number as the field data type)

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Lead' object configuration page.

Top Screenshot: Shows the 'Fields & Relationships' section. The left sidebar lists various configuration options, and the main area displays a list of field types. The 'Number' field type is selected, showing its description and configuration options.

Bottom Screenshot: Shows the 'New Custom Field' wizard, Step 2: Enter the details. The field label is 'Total Loan Installments'. The field type is 'Number'. The wizard prompts the user to enter the length of the number and the number of decimal places. The 'Required' checkbox is checked, and the 'Add this field to existing custom report types that contain this entity' checkbox is also checked.

7. Loan Repayment: (Field create the Number as the field data type)



8. Loan Amount: (Select the Field data type as Formula)

For the Loan Object >> Go to the fields and Relationship and select the formula in field data type. In Formula option select Advanced Formula and write the following formula

$$(\text{Loan_Repayment_c} * (((1 + (\text{Interest_Rate_c} / 52))^{\text{Term_c}}) - 1)) / ((\text{Interest_Rate_c} / 52) * ((1 + (\text{Interest_Rate_c} / 52))^{\text{Term_c}}))$$

##Check the syntax below whether the formula syntax is correct or not

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

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New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☒ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Checkbox Allows users to select a True (checked) or False (unchecked) value.

☐ Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date Allows users to enter a date or pick a date from a popup calendar.

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Lead

Details
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New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Full Name = LastName & " " & FirstName [More Examples...](#)

Simple Formula **Advanced Formula**

Insert Field

Insert Operator

Formula (Text)

$$\text{Formula (Text)} = \frac{(\text{Loan_Repayment_c} * ((1 + (\text{Interest_Rate_c} / 52)) ^ \text{Term_c}) - 1) / ((\text{Interest_Rate_c} / 52) * (1 + (\text{Interest_Rate_c} / 52)) ^ \text{Term_c}))}{1}$$

Functions
-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

Quick Tips

- Getting Started
- Operators & Functions