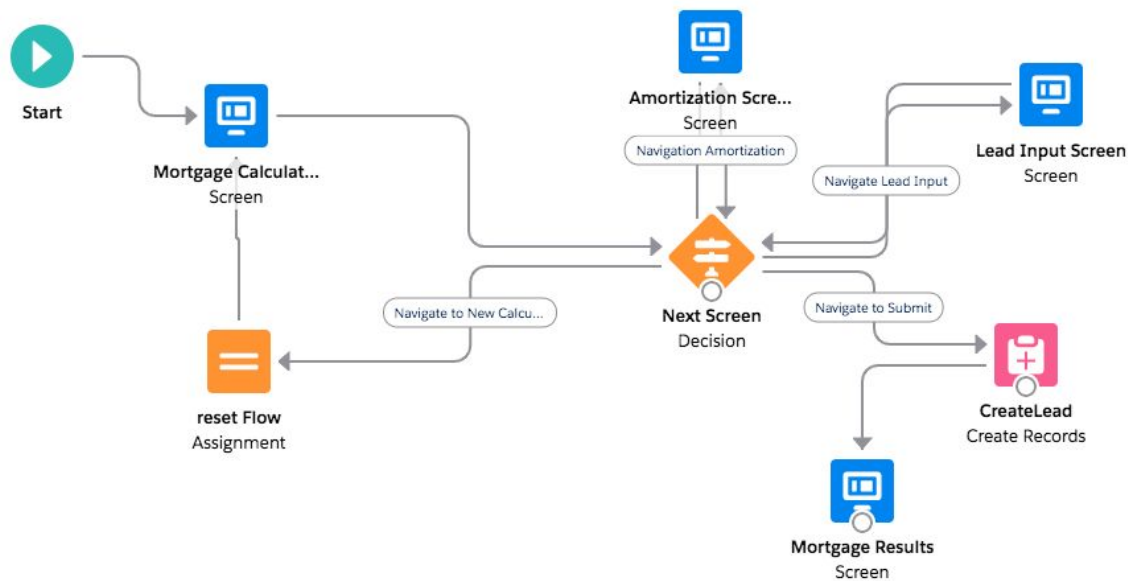


# Mortgage Calculator with Lead Generation Flow Guide

This document is to be a guide on how to implement and modify the Mortgage Calculator with Lead Generation Flow.

Saved 5 minutes ago **Active**



## Initial Setup

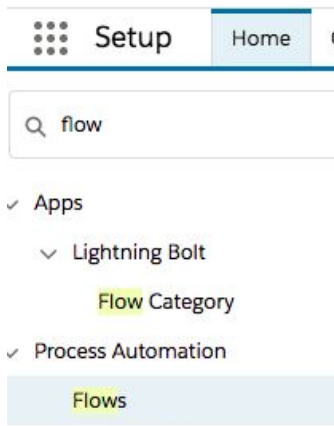
This flow template creates a lead. Ensure that the user running the flow has create access to the Lead object and edit access to the following fields

- City
- Company
- Country
- Description
- Email
- FirstName
- LastName
- LeadSource
- Phone
- PostalCode
- Saluation
- State

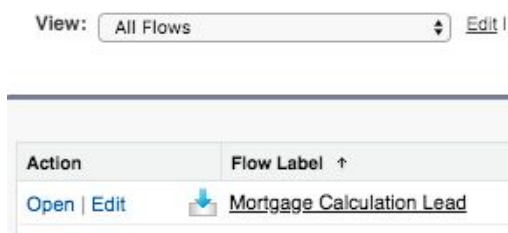
- Status
- Street

In order to use the Flow template right out of the box, you'll need to activate the Flow. Once you activate the flow, you can add the flow to quick actions, Community Builder Pages, App Builder Pages and the Utility bar.

1. To activate, go to setup -> Flows.



2. Find the "Mortgage Calculation Lead" flow.



3. click activate.

Flow  
Mortgage Calculation Lead

[Back to List: Flows](#)

**Flow Detail** [Edit](#) [Run](#)

Flow Label	Mortgage Calculation Lead	Flow API Name	Mortgage_Calculation_Lead
Description		Namespace Prefix	mciglabs1
Run Restrictions	User required	Type	Screen Flow
URL	/flow/mciglabs1/Mortgage_Calculation_Lead	Active Version	
Activated/Deactivated By	9/2/2019 4:24 PM	Template	True
Created By	9/1/2019 2:59 PM	Modified By	9/2/2019 4:24 PM

**Flow Versions**

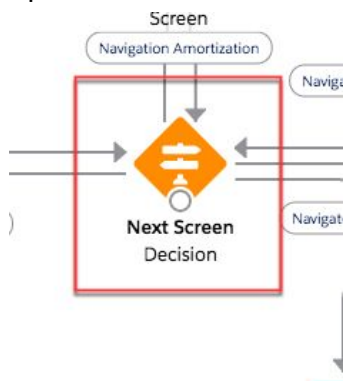
Action	Flow Label	Version	Description	Built with	Created Date	Run Restrictions	Type
<a href="#">Open</a> <a href="#">Run</a> <a href="#">Activate</a>	Mortgage Calculation Lead	1		Flow Builder	9/1/2019 2:59 PM	User required	Screen Flow

## Add Additional Navigation

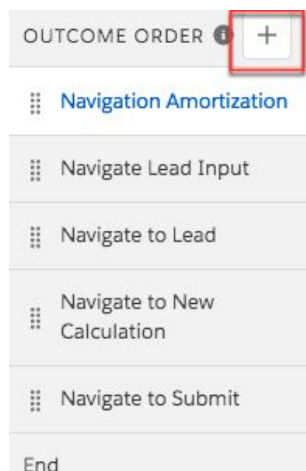
The Mortgage Calculator with Lead Generation flow is different from a typical linear flow. Instead of using the standard Previous, Next and Finish buttons, the flow uses custom navigation via an aura component. Each route navigates through the “Next Screen” decision. This is done to provide the flexibility for the user to either see the amortization schedule, navigate to the mortgage request or restart the monthly payment calculation.

In order to add additional navigation, you’ll need to first add a decision path.

1. Open the “Next Screen” decision.



2. Click add new outcome



3. Populate criteria for path. The “{!selectedNextScreen}” is the variable that will be set on screen button click.

OUTCOME DETAILS Delete Outcome

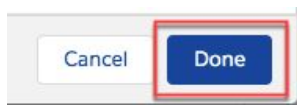
\*Label  \*Outcome API Name

When to Execute Outcome

Resource  Operator  Value

[+ Add Condition](#)

4. Click Done



After you modified the decision path, you'll need to add the flowNavigation component to the flow screen. Once you add the component to the flow screen, you'll need to set the component input and output parameters. The input parameter “buttonFields” is a comma / semi-colon delimited text string. Each semicolon delineates a key-value pair for a button. The key (left of the comma) is the button label, the value (right of the comma) is the same value of the decision path. In the example below, a “Cancel” and “Submit” button will be displayed on the screen. The output variable “Button Selected” should be “{!selectedNextScreen}”

← flowNavigation

\* API Name

\* buttonFields

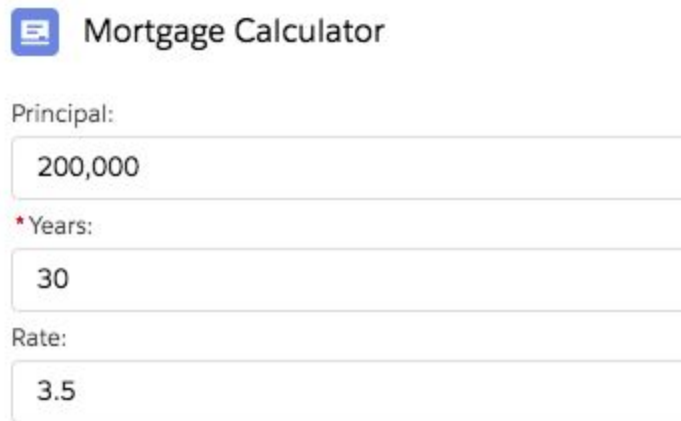
Button Selected

Store Output Values

A Button Selected

## Modify Default Mortgage Calculation Values

The Mortgage Calculator screen that has default values for the principal, rate, and years. These defaults are assigned are stored in flow variables.



**Mortgage Calculator**

Principal:  
200,000

\*Years:  
30

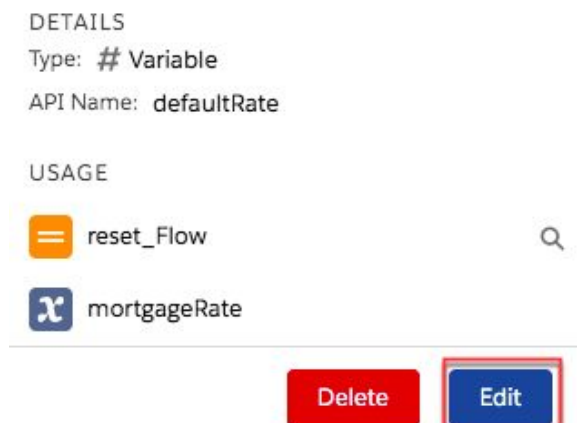
Rate:  
3.5

To change the default values for variables

1. Under toolbox, Manager, look for the defaultPrincipal, defaultRate, or defaultYears variables. Click the arrow next to the value you want to change.



2. Click the Edit button



DETAILS

Type: # Variable

API Name: defaultRate

USAGE

reset\_Flow

mortgageRate

Delete Edit

3. Change the default value and click done.



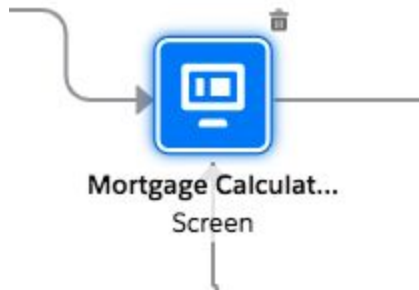
Default Value

5

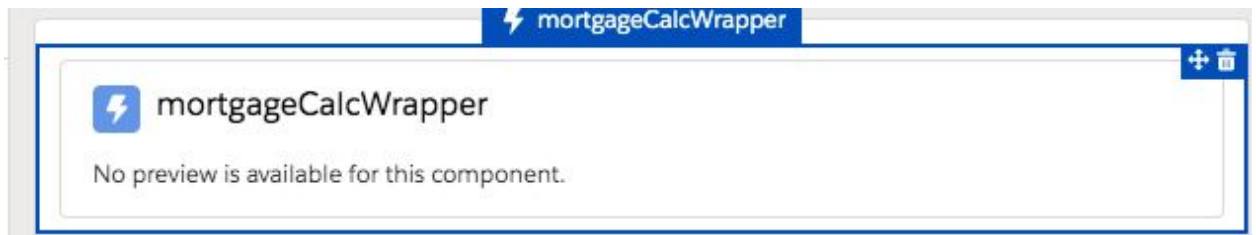
4. Don't forget to save all your changes.

To change the year options

1. Open the Mortgage Calculation Screen



2. Click on the mortgageCalcWrapper



3. On the input variable "Mortgage Length Options" set the values you want to display.  
NOTE: the values need to comma delimited

