# Manual Field Creation - Phase 1

## Lead Entity Custom Fields for Financial Calculations

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### 1. Lead Score

**Field Name:** `leadScore`
**Type:** Integer
**Label:** Lead Score
**Min Value:** 0
**Max Value:** 100
**Default Value:** 0
**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** No
**Tooltip:** Auto-calculated lead quality score (0-100)

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### 2. Score Last Updated

**Field Name:** `scoreLastUpdated`
**Type:** DateTime
**Label:** Score Last Updated
**Required:** No
**Read Only:** Yes
**Audited:** No

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### 3. Monthly Income

**Field Name:** `cMonthlyIncome`
**Type:** Currency
**Label:** Monthly Income
**Required:** No
**Read Only:** No

**Audited:** Yes
**Tooltip:** Customer's gross monthly income

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## 4. FOIR (Fixed Obligation to Income Ratio)

**Field Name:** cFOIR
**Type:** Float
**Label:** FOIR (%)
**Decimal Places:** 2
**Min Value:** 0
**Max Value:** 100
**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** No
**Tooltip:** Fixed Obligation to Income Ratio - New EMI / Income × 100

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## 5. DTI (Debt-to-Income Ratio)

**Field Name:** cDTI
**Type:** Float
**Label:** DTI (%)
**Decimal Places:** 2
**Min Value:** 0
**Max Value:** 100
**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** No
**Tooltip:** Debt-to-Income Ratio - Total Obligations / Income × 100

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## 6. Proposed EMI

**Field Name:** cProposedEMI
**Type:** Currency
**Label:** Proposed Monthly EMI
**Required:** No
**Read Only:** Yes (calculated by formula)

**Audited:** No
**Tooltip:** Calculated monthly installment based on loan amount and tenure

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## 7. Calculated EMI

**Field Name:** `cCalculatedEMI`
**Type:** Currency
**Label:** Calculated EMI
**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** No

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## 8. Financial Qualification

**Field Name:** `cFinancialQualification`
**Type:** Enum
**Label:** Financial Qualification
**Options:**

- Pass
- Fail
- Pending

**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** Yes
**Default:** Pending
**Tooltip:** Auto-calculated based on FOIR/DTI thresholds

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## 9. Max Eligible Amount

**Field Name:** `cMaxEligibleAmount`
**Type:** Currency
**Label:** Max Eligible Loan Amount
**Required:** No
**Read Only:** Yes (calculated by formula)
**Audited:** No
**Tooltip:** Maximum loan amount customer qualifies for based on income

## 10. CRIB Status

**Field Name:** cCRIBStatus
**Type:** Enum
**Label:** CRIB Status
**Options:**

- Clean
- Defaults
- Pending
- Not Checked

**Required:** No
**Read Only:** No
**Audited:** Yes
**Default:** Not Checked

## 11. CRIB Last Checked

**Field Name:** cCRIBLastChecked
**Type:** DateTime
**Label:** CRIB Last Checked
**Required:** No
**Read Only:** No
**Audited:** Yes

## 12. Existing Loans Detail

**Field Name:** cExistingLoans
**Type:** Text
**Label:** Existing Loans (CRIB Details)
**Rows:** 4
**Required:** No
**Read Only:** No
**Audited:** No
**Tooltip:** Details of existing loans from CRIB report

# Verification Checklist

After creating all fields:

- ☐ All 12 fields created successfully
- ☐ Field names exactly match (case-sensitive)
- ☐ Field types correct
- ☐ Read-only fields marked as calculated
- ☐ Enum options entered correctly
- ☐ Currency fields use default currency (LKR)
- ☐ No errors in Entity Manager

# Layout Recommendations

After field creation, add to Lead Detail Layout:

**Panel: Lead Scoring**

- leadScore (with badge/color coding)
- scoreLastUpdated

**Panel: Financial Assessment**

- cMonthlyIncome
- cExistingMonthlyObligations (already exists)
- cProposedEMI
- cFOIR
- cDTI
- cFinancialQualification (with badge)
- cMaxEligibleAmount

**Panel: Credit Bureau**

- cCreditScore (already exists)
- cCRIBStatus
- cCRIBLastChecked
- cExistingLoans