

The Loan Payment Schedule Generator for Salesforce®

Configuration and Administration Guide

Updated for AMCalc ver. 3.4

By



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Introduction

This guide will walk you through the configuration and administration of the different features of the AMCalc package. In order to perform the steps in this guide, your Salesforce user account should have system administration privileges and you should be familiar with standard Salesforce administration tasks such as creating custom fields, editing page layouts, and assigning user permissions.

It is also recommended that you read the AMCalc User Guide to familiarize yourself with how AMCalc operates.

If you are interested in learning about the AMCalc web service, you can find all of the information that you will need in the AMCalc Web Services Developer Guide.

Before You Get Started

This guide assumes that your company is using Salesforce in Lightning Experience. Later you will be walked through how to update Lightning Experience page layouts with AMCalc custom components. In order to do this, your Salesforce org must have My Domain deployed. If you are unfamiliar with Salesforce My Domain, see the [Salesforce Identity Implementation Guide](#).

If your company has not transitioned to Salesforce Lightning Experience yet, please email support@3creekstech.com for help with this guide.

Additional AMCalc Guides

In addition to this Configuration and Administration Guide, you can find the following guides on the [AMCalc AppExchange page](#):

- **AMCalc User Guide** – AMCalc calculator users should read this guide for complete information on how to use the calculator and to understand the format of generated loan schedules for each loan type.
- **AMCalc Web Services Developer Guide** – A technical guide on how to use the AMCalc web service API.

Additionally, in any AMCalc component that displays a question mark icon, click on the icon to get help on the AMCalc component that you are using.

Section 1: Installing and Configuring AMCalc Components

Setting Permissions for AMCalc Object Access

AMCalc comes with pre-defined Permission Sets you can use to give your users access to the AMCalc components that they will be using. Salesforce permission sets are pre-packaged bundles of user privileges that are assigned to users. Using permission sets to assign user privileges is a fast and easy way to give your users access to the data in Salesforce that they need to do their job.

The following permission sets are included in the AMCalc package and can be used to assign access to your users. For more information about how the AMCalc administration tools are used, see **Section 2: AMCalc Administration** of this guide.

Permission Set Name	Description
AMCalc Payment Schedule Create and Edit	This permission set should be assigned to users that will be creating, editing, or deleting loan payment schedules. This primarily includes users that will be using the AMCalc Calculator on Salesforce detail pages. See the Add the AMCalc Calculator Detail Page Layouts section. The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that store loan payment schedule information • Read access to tables that hold calculator definitions • Read access to tables that contain adjustable loan definitions • Read access to tables the hold interest and index rate information • Read access to tables that contain export templates
AMCalc Payment Schedule View and Report	Assign this permission set to users that will only view loan payment schedules or run reports. The following privileges are assigned with this permission set: • Read access to tables that store loan payment schedule information • Read access to tables the hold interest rate information • Read access to tables that contain adjustable loan definitions

AMCalc Adjustable Loan Definitions Administrator	Assign this permission set to users that will be creating and maintaining Adjustable Loan Definitions. The following privileges are assigned with this permission set: • Read, create, edit, and delete access to tables that contain adjustable loan definitions. • Read access to tables that store loan payment schedule information • Read access to tables the hold interest rate information
AMCalc Payment Schedule Create (Digital Experiences user)	This permission set should be assigned to users that will be using AMCalc calculators on Salesforce Digital Experiences sites (see the AMCalc Calculators for Salesforce Digital Experiences in Section 2 of this guide section for details). This may include guest user accounts if you intend to have a publically available Digital Experiences site with an AMCalc calculator on it. For Digital Experiences sites that require logins, if the user accounts that will be accessing the site have profiles with the <i>AMCalc Amortization Schedule Create and Edit</i> permission set assigned to them, there is no need to also assign this permission set. The following privileges are assigned with this permission set: • Read and create access to the standard Salesforce object Lead • Read and create access to tables that store loan payment schedule information • Read access to tables that hold calculator definitions • Read access to tables the hold interest rate information
AMCalc Calculator Definition Administrator	Assign this permission set to users that will be creating and maintaining AMCalc calculator definitions for Digital Experiences.

	The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that hold calculator definitions
AMCalc Schedule Emailing Administrator	Assign this permission set to users that will be creating and maintaining AMCalc schedule emailing setting. The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that hold loan schedule emailing settings
AMCalc Export Template Administrator	Assign this permission set to users that will be creating and maintaining AMCalc export templates. The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that hold export templates
AMCalc Rate Administrator	Assign this permission set to users that will be creating and maintaining AMCalc interest rate and index entries. The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that hold interest rate entries
AMCalc Loan Payment Processor	If you are going to be processing loan payments, you should assign this permission set to the user that the Loan Payment Extractor Flow process will be running under. The following privileges are assigned with this permission set: • Read access to the table holding the settings that defines how loan payment information is processed. • Read and edit access to tables that store loan payment schedule information

	Note: You will also need to manually assign read and create access to this user to the object that you have configured to have payment information sent to. See the Loan Payments section of this guide for details.
AMCalc Settings Administrator	Assign this permission set to users that will be maintaining any of the information under the general Settings tab The following privileges are assigned with this permission set: • Read, create, edit, delete access to tables that hold the general settings.

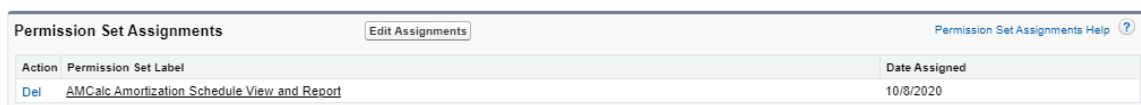
Note that the permission sets that are included for administrative tool users do not always have access to tables that hold loan payment schedules. Conversely, the permission set with the most privileges to loan payment schedule tables, *AMCalc Amortization Schedule Create and Edit*, does not have write access to administrative tables.

If you have a user that will need full access (read, create, edit, delete) to loan payment schedules and will also need to maintain AMCalc administrative information, you will need to assign the user the *AMCalc Amortization Schedule Create and Edit* permission set and the appropriate administration permissions set or sets.

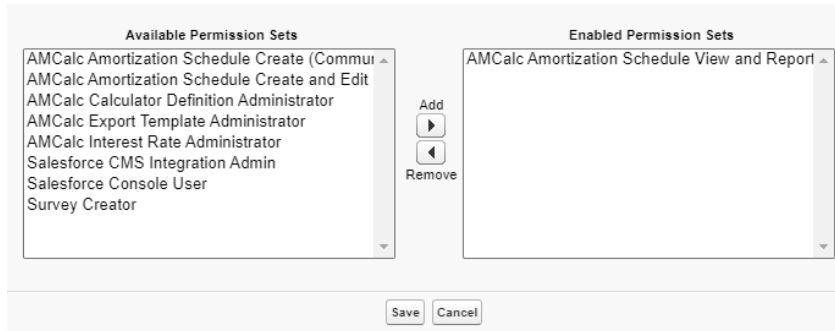
Assigning Permissions Sets to Users

Permission sets are assigned at the Salesforce user level.

1. Go to the Setup menu and type *Users* in the quick find box, and then click the Users menu item.
2. Select the user to assign the permission set to and scroll down to the related list portion of the screen until you see the Permission Set Assignment related list. Click the *Edit Assignments* button



3. Move the permission sets to assign to this user from the left-hand box to the right-hand box and click *Save*.



Relating AMCalc Schedules to Salesforce Objects

AMCalc generates loan payment schedules that are then associated with Salesforce objects. The Salesforce object that it is associated with is referred to as the parent record and the saved loan payment schedule record can be generically referred to as the child record. As the parent-child relationship implies, multiple loan payment schedule records can be saved to a single parent Salesforce record.

One of the first steps to configuring your AMCalc installation is to create this parent-child relationship between AMCalc loan schedules and other Salesforce Objects. The object or objects that you select as parents can be standard Salesforce objects, such as Account or Lead, or custom objects that have been created in your system.

You may already know which of your Salesforce objects will be parent objects to AMCalc schedules. If not, you should take a moment to think about how AMCalc Schedules will be used. If your users will need to create loan payment schedules while in the Opportunities screen, then you will want to make Opportunity a parent object. If you have a custom loan application processing package installed, or have created your own loan processing objects, perhaps one of these objects should be a parent object.

You have the ability to configure more than one Salesforce object as the parent of AMCalc schedules. However, you will want to limit the number of parent objects to those that are absolutely necessary. Creating too many parent objects will lead to user confusion as they will not know which screen to go to if they are creating or looking for a particular loan payment schedule.

If you are planning to use AMCalc calculators on Salesforce Digital Experiences sites, and you plan to collect lead information through them, it is required that the Lead object is a parent to AMCalc. This is so that loan payment schedules created by prospects can be associated with the lead record that is also created when they submit their contact information.

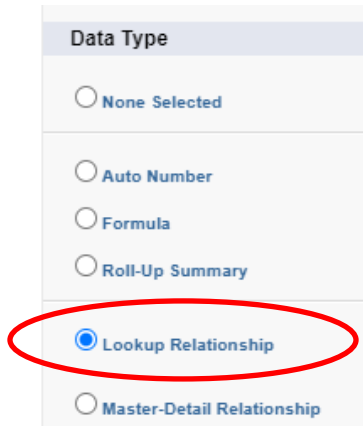
Later, once the lead is “qualified”, your users may convert the lead to a contact. When this happens, Salesforce creates not only the contact record from the lead, but also an account record and, possibly, an opportunity record. When you configure an AMCalc calculator for a Digital Experiences site, you will indicate which of these Salesforce objects the loan payment schedule created by the lead is converted to. So, in addition to the Lead object, you will likely make the Contact, Account, or Opportunity object a

parent to AMCalc as well. This will all be covered more later in this guide. To learn more about the Salesforce Lead conversion process, see this Salesforce [documentation](#).

Creating Parent Object Relationships

To add a Salesforce object to AMCalc as a parent, follow the steps below.

1. Navigate to the Setup menu, type Object Manager into Quick Find box, and then click on the Object Manager menu item.
2. Find the object called *Amortization Schedule* in the Label column and select it. Then select the Fields & Relationships item from the menu on the left, and then click the *New* button in the upper right-hand side of the screen.
3. You should now be in the New Custom Field screen and can now define a custom field that will relate AMCalc to a parent object. Click the radio button next to *Lookup Relationship* and then click the *Next* button.



Data Type

☐ None Selected

☐ Auto Number

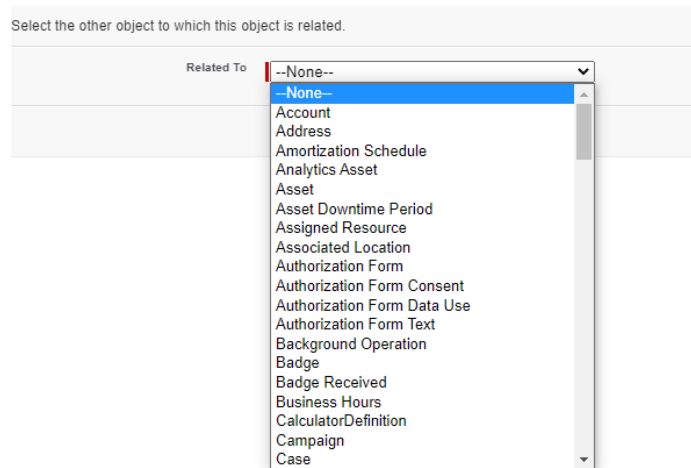
☐ Formula

☐ Roll-Up Summary

☒ **Lookup Relationship**

☐ Master-Detail Relationship

4. From the drop down, select the object the will be the parent to AMCalc and click *Next*.



Select the other object to which this object is related.

Related To: --None--

- None--
- Account
- Address
- Amortization Schedule
- Analytics Asset
- Asset
- Asset Downtime Period
- Assigned Resource
- Associated Location
- Authorization Form
- Authorization Form Consent
- Authorization Form Data Use
- Authorization Form Text
- Background Operation
- Badge
- Badge Received
- Business Hours
- CalculatorDefinition
- Campaign
- Case

- On the screen titled *New Relationship*, we will configure the field label, field name, and relationship name, among other things, for the new field. You can either accept the labels and names that have been defaulted for you or make up one of your own.

If there are selections displayed under the *Child Relationship Name* dropdown, make sure that the *Required* checkbox is not selected and keep the defaulted selection of *Clear the value of this field*. Click the *Next* button.

Amortization Schedule New Relationship

Step 3. Enter the label and name for the lookup field

Field Label ⓘ

Field Name ⓘ

Description

Help Text ⓘ

Child Relationship Name ⓘ

Required ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted?

☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

- Now you will indicate which user profiles have access to this lookup relationship field. Earlier in this guide you applied AMCalc permission sets to user account records. Since the lookup relationship fields that you are creating now are new, the permission sets that came with the AMCalc package will not reference them, so you will need to indicate the permissions to the lookup field on this screen. For users that will be creating and saving loan payment schedules, be sure that the check box is selected in the *Visible* column next to their profile and the *Read-Only* box is NOT checked. When complete, click *Next*.
- You should now be on the page titled *Step 5. Add reference field to Page Layouts*. Accept the defaults on this page and click *Next* to get to the screen titled *Step 6. Add custom related list*. This page allows you to add the AMCalc related list to the page layouts of the parent object. The related list is where users will go to view saved loan payment schedules. For example, when in the opportunity screen, the user can see if there are loan payment schedules created for that opportunity by looking at the AMCalc related list.



Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in

To change the location of this field on the page, you will need to customize the page layout.

Add Related List	Page Layout Name
☒	Opportunity (Marketing) Layout
☒	Opportunity (Sales) Layout
☒	Opportunity (Support) Layout
☒	Opportunity Layout

☒ Append related list to users' existing personal customizations

Select page layouts for those pages that should have the AMCalc related list on them and deselect those that should not.

When done, either click *Save & New* to create another relationship field, or click *Save* to go back to the object manager.

Compact Page Layouts

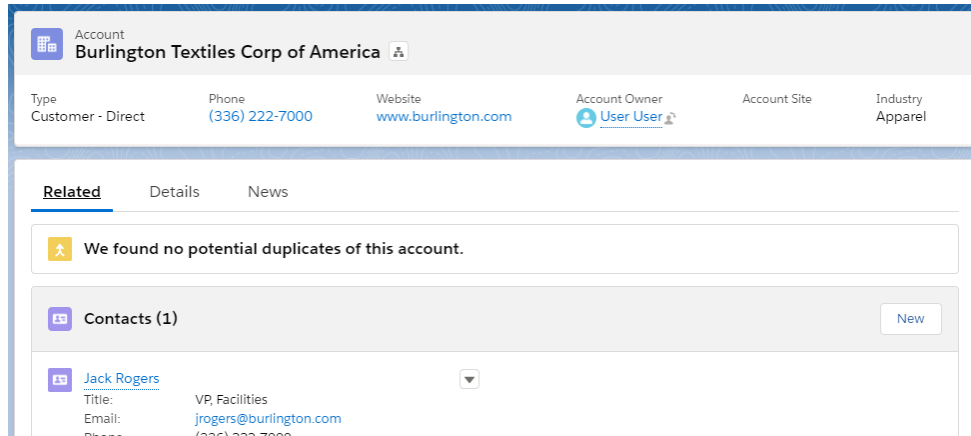
While you are in the Object Manager page for the AMCalc object, now would be a good time to configure the compact page layout. Compact layouts are groups of fields that will be displayed when a user hovers their mouse pointer over a saved AMCalc schedule. By default only the schedule name is in the compact layout, so you may want to add additional fields that may be useful for your users.

1. Click on Compact Layout from the left-hand side menu of Object Manager.
2. Salesforce does not allow you to modify the System Default compact layout so click the *New* button to create a new one.
3. Input a name for the layout and tab through the Name field. Select fields from the Available Fields box and use the *Add* button to move them to the Selected Fields box. Use the up and down buttons to adjust the field order and when complete, click the save button.
4. Click the *Compact Layout Assignment* button, click the *Edit Assignment* button, select the compact layout you created and click the *Save* button.

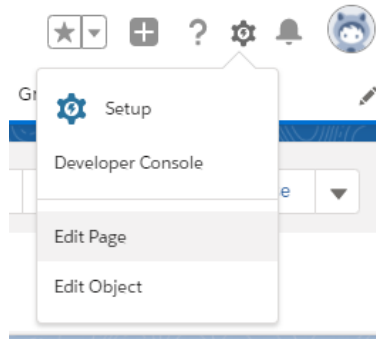
Adding the AMCalc Calculator to Detail Page Layouts

Now that you have created parent and child relationships, you can add the AMCalc calculator to the parent object's page layouts. The AMCalc package comes with two types of calculator, an advanced calculator that is designed for use by logged in Salesforce users and a calculator with a configurable interface for use with Salesforce Digital Experiences (Digital Experiences users can be named users that need to login in or guest users that do not need to log in). This section will explain how to configure the first type of calculator mentioned. Later sections in this guide will detail how to configure and use the Digital Experiences calculator.

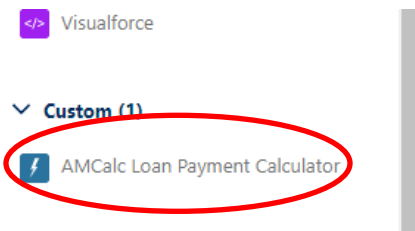
1. Navigate to any record page of the parent object that will have the calculator on it. The record page will show the details of the parent record and will typically have tabs labeled *Related* and *Details*. Below is an example of an account record page.



Click the gear icon in the upper right-hand corner of the screen and select *Edit Page*.



On the left-hand side of the app builder page will be a list labeled *Components*. Scroll down until you see the Custom section, then click and drag the entry called *AMCalc Loan Payment Calculator* on to the page.

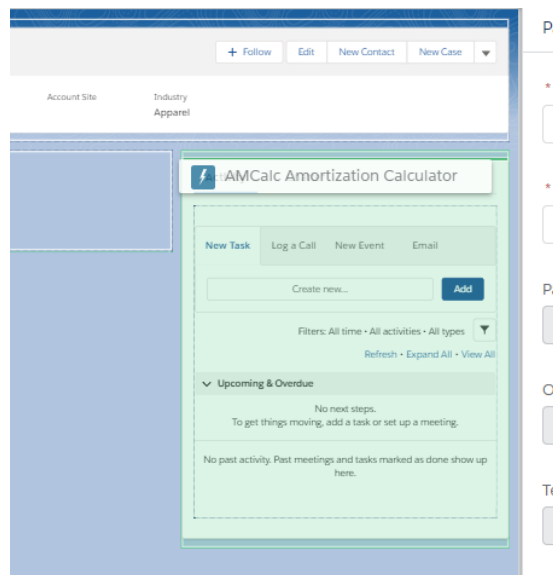


Note: If you do not see the component called *AMCalc Loan Payment Calculator*, it could be for one of two possible reasons:

First, the AMCalc package may not be installed. To validate that it is installed, go to the Installed Packages page within Setup and ensure that AMCalc is listed and that, if you are demoing the package, the demo period is not expired. If the demo period has expired, email us at support@3creekstech.com and we may be able to extend trial period for you.

Second, be sure that you have My Domain deployed within your Salesforce org. If you do not have it deployed, custom components will not be shown in the Lightning App Builder. If you are unfamiliar with Salesforce My Domain, see the [Salesforce Identity Implementation Guide](#).

As you drag the AMCalc component onto the page, you will see green highlights over the areas of the page where you are allowed to drop the component.



You can place the AMCalc calculator into any section that is highlighted green, but the calculator fits best on the right-hand side of the screen where the section is a little thinner. In this section the calculator is always visible even while the user is viewing the details of the parent record. Once the calculator has been dropped on the screen, the page builder should look something like this:



The screenshot displays the account page for Burlington Textiles Corp of America. The header includes the account name, type (Customer - Direct), phone number ((336) 222-7000), website (www.burlington.com), account owner (User User), account site, and industry (Apparel). The main content area is divided into sections: Related, Details, and News. The Related section shows a message about insufficient permissions, a note about no potential duplicates, and lists of contacts (1), opportunities (1), and cases (2). The AMCalc Amortization Schedule Calculator is visible on the right side of the screen, with fields for Loan Type, Loan Amount, Interest Rate (%), Month Convention, Year Convention, Time Unit, Loan Amortization (yrs.), Loan Term (yrs.), Payment Frequency, Loan Start Date, First Payment Date, Last Payment Date, and More Payment Date Options.

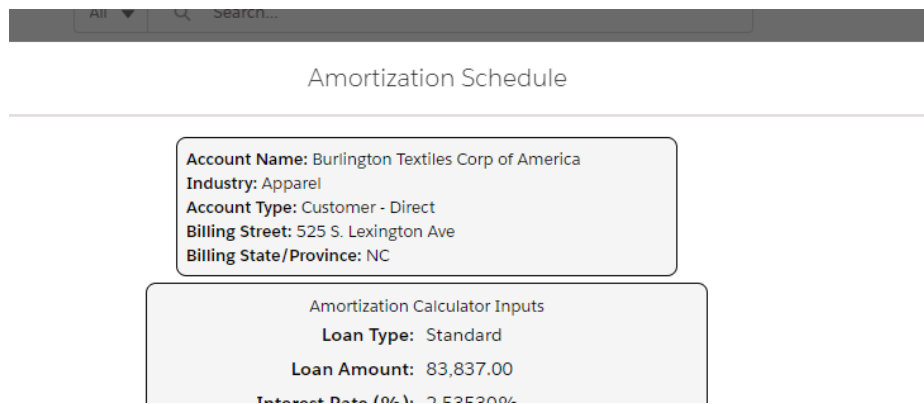
2. If required, use the *Add Filter* button on the right-hand side of the screen to create rules that will show or hide the AMCalc calculator based on different parent record criteria. For example, if you are adding the calculator to the account screen, you can set criteria that will only show the calculator on the screen if the account is a customer.
3. Click the *Save* button to save the changes that you have made to the screen. In the pop up, be sure to click the *Activate* button to make the changes that you have made available to your users. Follow the instructions in the Activation screens to activate the screen for different profiles.

Once you have completed these steps, you should be able to go out to the record page, generate loan payment schedules, save them (see note below), and then view them again by clicking on the payment schedule in the Amortization Schedule related list on the page.

Note: You are able to add the AMCalc calculator to just about any object's detail page and use it to generate viewable loan payment schedules. However, if you add the calculator to an object's detail page that does not have a lookup relationship with AMCalc, you will not be able to save the schedule. See the **Creating Parent Object Relationships** sections to understand lookup relationships and how to create them.

Configuring Loan Payment Schedule Headers

When the AMCalc calculator is used to generate a loan payment schedule or when a user views a saved loan payment schedule, the schedule comes up in a modal dialog box. It may be useful to your users to also see some of the details of the underlying parent record while viewing the loan payment schedule.



Amortization Schedule

Account Name: Burlington Textiles Corp of America
 Industry: Apparel
 Account Type: Customer - Direct
 Billing Street: 525 S. Lexington Ave
 Billing State/Province: NC

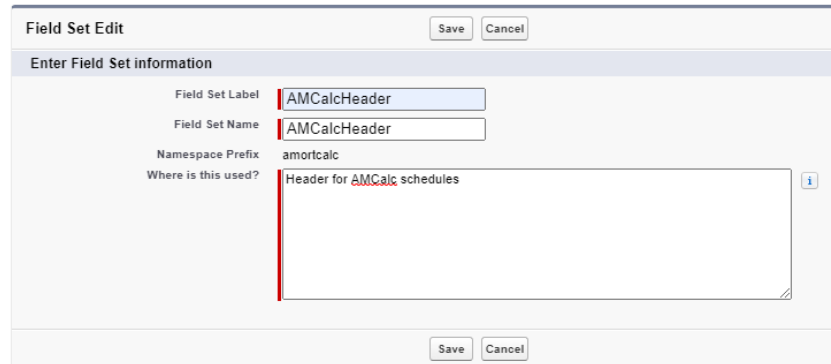
Amortization Calculator Inputs
 Loan Type: Standard
 Loan Amount: 83,837.00
 Interest Rate (APR): 3.525208%

AMCalc gives you the ability to easily create customized headers for loan payment schedules that will display parent record information to your users. The above example shows a header that displays the account name, industry, account type, and address of the underlying parent account record.

You can create different headers for each type of parent record that is associated with AMCalc, each displaying the information that is most useful for that particular type of parent record. This is done through Salesforce Field Sets. To create a field set for a parent object, follow the below instructions:

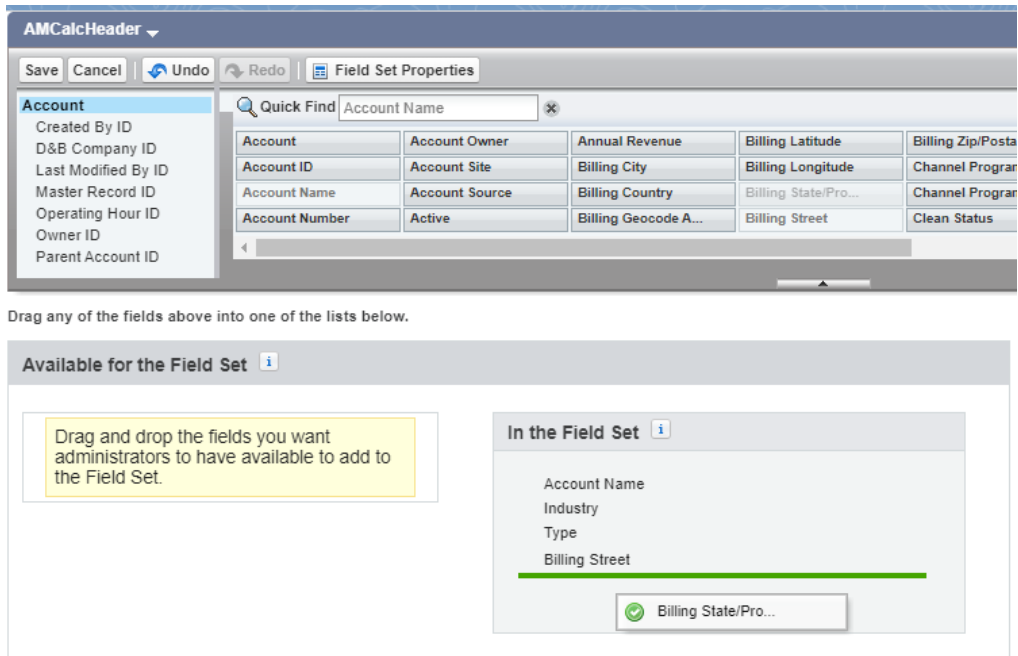
1. In the Quick Find box of the Set Up menu, type Object Manager, and then click on the *Object Manager* menu item. Next, click the name of the parent object that you are creating a header for and then select the *Field Sets* menu item on the left-hand side menu.
2. Click the *New* button (upper right-hand side). In the Field Set Label field input *AMCalcHeader*, press the tab button twice to get into the *Where is this used?* Box (accept the default Field Set Name value) and type a description in the box. Click the *Save* button to go to the next page

New Field Set



Important: In order for AMCalc to find the field set, it **must** be named AMCalcHeader. If you have multiple Salesforce objects that are parents to AMCalc, Salesforce allows you to have a field set in each parent object called AMCalcHeader.

3. Drag and drop the fields that you would like to display in the header down to the *In the Field Set* box



Drag any of the fields above into one of the lists below.

Available for the Field Set ⓘ

Drag and drop the fields you want administrators to have available to add to the Field Set.

In the Field Set ⓘ

- Account Name
- Industry
- Type
- Billing Street
- ☒ Billing State/Pro...

When you have all of the fields that you would like to display to the users in the *In the Field Set* box, click the *Save* button in the upper left-hand corner.

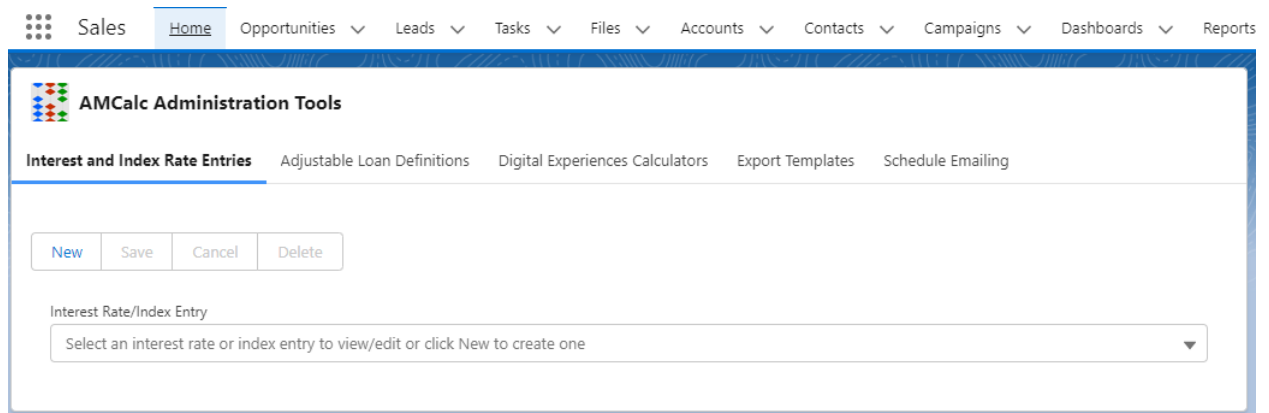
Repeat the above three steps for each parent object that you would like to create a header for.

Adding AMCalc Administration Tools to Home Page Layouts

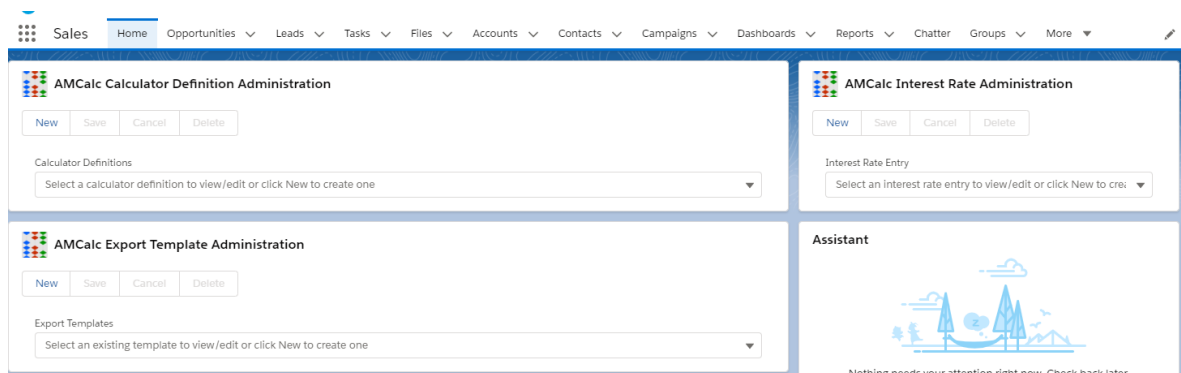
The AMCalc package has a number of administration tools that allow the creation and maintenance of AMCalc supporting data and drives some of the functionality of AMCalc for your users. These administration tools are designed to be deployed on Salesforce app Home pages.

There are two ways that you can deploy the AMCalc administration tools into your Salesforce org. Which way you decide to deploy the administration tools depends on who in your company will be using the administration tools.

- **Method 1:** Use the AMCalc Administration Tool Tabs component to deploy all of the AMCalc administration tools together. This allows access to each tool from one location by clicking on a tab menu.

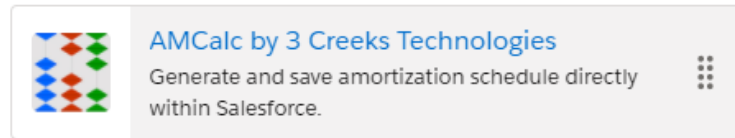


- **Method 2:** Deploy each AMCalc administration tool individually to the same or different application Home pages. This method would typically be done if you will have different home pages assigned to different users and you want to divide up AMCalc administration among those users.



Adding any of the administration tools or tool tabs to a Salesforce home page screen follows the same process that you went through to add the AMCalc Calculator to a record page, but you will need to be on a Salesforce app's home page instead of a record detail page. Once on an app home page, click the gear icon, select Edit Page, drag and drop the AMCalc administration component (found under the Custom heading in the Components listing) onto the page, save and activate the screen.

An AMCalc Lightning app was installed with the package (see below) and you have the option of placing these administration tools in the home page of it. If you do, you can restrict user access to the AMCalc admin tools by limiting the profiles that have access to the AMCalc Lightning app.



The sections below describe how to use each administration tool that comes with the AMCalc package. Regardless of the way you deploy the administration tools, whether individually or through the tool tabs, the operation of each administration tool is the same.

Security Settings for Generating Graphs

Starting with version 3, users can generating graphs when viewing saved loan schedules and when using the schedule compare tool. The AMCalc graphing functionality requires updated Salesforce security called *Lightning Web Security*. For newer Salesforce instances, Lightning Web Security is already enabled by default. However, if your Salesforce instance was spun up before the Salesforce Winter 24 release, you may need to enable Lightning Web Security manually. Follow the steps below to do so.

1. Navigate to the Setup screen and type "Session Settings" into the Quick Find box
2. Find the section titled *Lightning Web Security* and check the box for "Use Lightning Web Security for Lightning web component and Aura components".



3. Scroll to the bottom of the Sessions Settings page and click the *Save* button.
4. Clear your browser's cache before trying the graphing functionality.

To read more about Lightning Web Security, see this [Salesforce documentation](#).

Section 2: AMCalc Administration

AMCalc Administration Tools

The AMCalc package has six administration tools that allow the creation and maintenance of AMCalc supporting data. Below is an overview of each.

- **Interest and Index Rate Entries**
Interest and index rate entries let users centrally manage interest rates and Index values. They provide for a standard way for users and the AMCalc system to use current interest and indexes rate values in the calculations AMCalc performs.
- **Adjustable Loan Definitions**
Adjustable loan definitions simplify the generation of adjustable loan schedules for users by grouping attributes of the adjustable loan together into a single selectable component.
- **Digital Experiences Calculators**
This tool allows you to create definitions that are used by AMCalc calculators on Salesforce Digital Experiences pages. The Digital Experiences web page containing the AMCalc Calculator can then be exposed on a public webpage and used to showcase your company's offerings and collect lead information.
- **Schedule Emailing**
If your users will be sending generated loan payment schedules to clients or prospect, you can create one or more entries to default the content of the email message. This makes emailing faster and allows you to configure standardized legal disclaimers and other consistent messaging across your company.
- **Export Templates**
The export template administration tool allows you to create export definitions that users can then select from when exporting loan payment schedule information.
- **General Settings**
The General Settings tool allows you to view and configure different settings that AMCalc uses for its operations and automated processes.

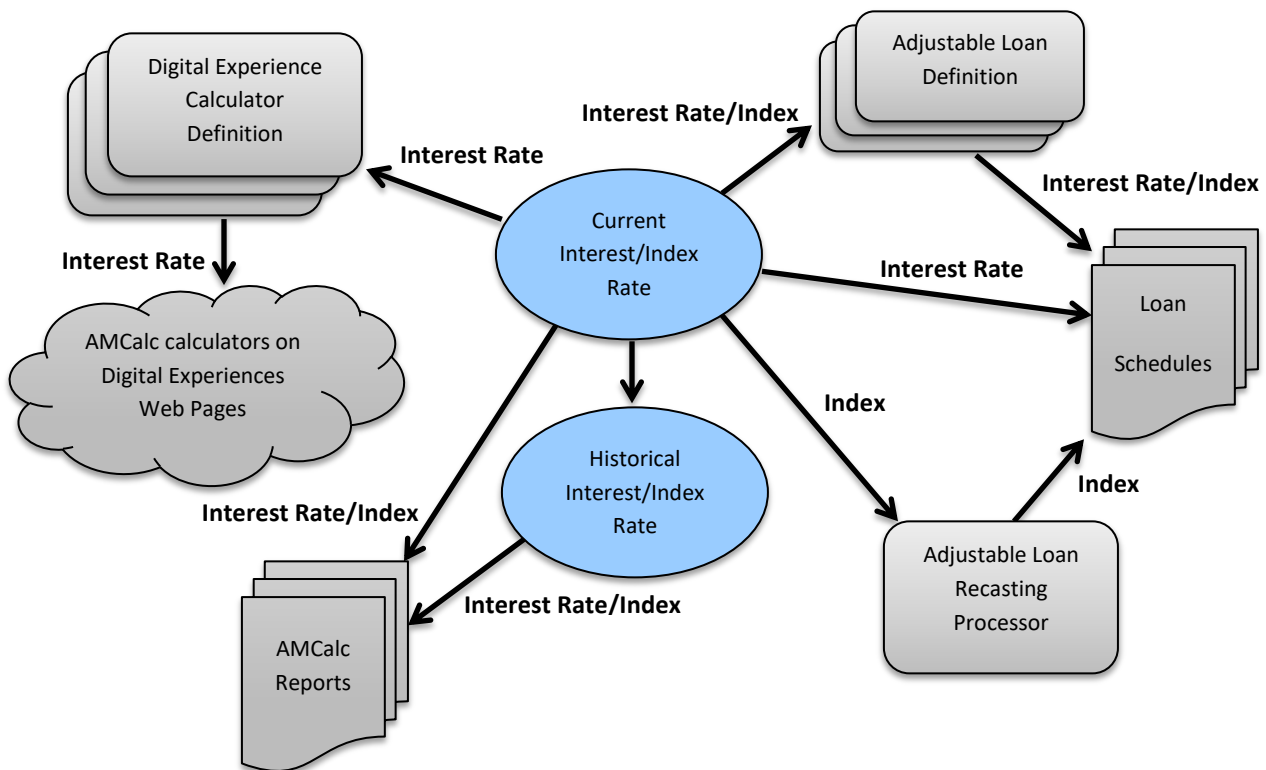
Interest Rate and Index Administration

Interest and index rate entries is one of the most important and powerful components in the AMCalc package. You add and maintain rates using the Interest Rate and Index Administration tool. Once you

create interest and index entries, they can be selected by users and AMCalc processes to get the latest rate values for calculations.

How does it work?

With the AMCalc Interest Rate and Index Administration tool, you have a central place to quickly and easily create and maintain the interest rate values that your company uses. Additionally, when you update an entry to the latest value, the old interest rate value is automatically archived as a historical record. This allows you to report on how rates have changed over time. The AMCalc package comes with a number of predefined interest rate reports that you can use as-is or create your own reports. The diagram below gives you a high-level illustration of the AMCalc components that use interest rate and index entries. If this looks a little confusing to you now, just wait. As you read through the rest of Section 2 of this guide, you will get a much better understanding of this diagram.



To create a new rate entry select the *New* button in the administration tool, or select an existing rate entry from the drop down to edit it.

New
Save
Cancel
Delete

Entry Information

* Name

* Current Rate Percentage

XXX.XXX (up to 3 decimal places allowed)

* Type ⓘ

Interest Rate ▼

Active

No

ⓘ

Notes

The below table describe the fields for a rate entry.

Field Name	Description
Name	The name of the rate entry. This is the name that users will see when selecting the entry while in a calculator or in the other administration tools.
Current Rate Percentage	The rate percentage value for the entry.
Type	The rate entry type. Select from either <i>Interest Rate</i> or <i>Index</i>. Interest rates are selected by calculator users when generating a loan schedules and used by calculators on Digital Experiences web pages. Both interest rates and indexes are used by adjustable loan schedules via the adjustable loan definition that is applied to the schedule. Note: When creating new interest or index rate entries, once you save the record, the <i>Type</i> value for the entry it can no longer be changed.
Active	Checking active makes the entry available for selection by a user while in the AMCalc calculator or another administration tool. Important: Making an entry inactive removes it from the list of selections when creating new loan schedules, creating new Digital Experience calculators, and creating new Adjustable Loan Definitions. It does not remove the entry from previously saved schedules or definitions. The intention of the active/inactive toggle button is to allow you to “retire” interest rate and index entries so that they are no longer used going forward.
Notes	Provide any other information necessary for the entry in the text area.

Once you have entered or updated your rate entry, click the *Save* button to save your changes.

Once a new entry has been saved, updating an interest rate or index to a new value simply involves selecting the entry using the admin tool, inputting the new percentage value into the *Current Rate Percentage* field, and clicking the *Save* button. Once saved, you will see that the Historical Rates section of the screen is immediately updated to show the old rate as a historical record and the new rate as current.

Entry Information

* Name

10 Year Retail Interest Rate

* Current Rate Percentage

2.300

* Type ⓘ

Interest Rate
▼

Active

☒
Yes ⓘ

Notes

Historical Rates for 10 Year Retail Interest Rate

Date Range	Rate Percentage	Entered By
Current since 11/4/2022, 2:45 PM	2.300%	User User
11/1/2022, 1:23 PM to 11/1/2022, 1:28 PM	4.567%	User User
10/27/2022, 11:17 AM to 11/1/2022, 1:23 PM	5.350%	User User
10/26/2022, 4:10 PM to 10/27/2022, 11:17 AM	7.500%	User User

Special Considerations When Deleting Rate Entries

If your organization no longer requires a rate entry, we recommend that you inactivate the entry instead of deleting it.

If you decide to delete a rate entry, be aware of these special considerations:

- AMCalc will not allow you to delete a rate entry if it is also saved on either an Adjustable Loan Definition or a Digital Experiences calculator.
- Saved loan schedules (for any loan type other than adjustable loans) that used a rate entry will be saved with both the rate percentage that was current at the time of schedule generation and a reference to the interest rate entry. This allows you to create reports that show the rate entry name that was used on the schedule. If the interest rate entry is deleted, the interest rate percentage saved with the schedule will remain on the schedule record, but the reference to the rate entry will be removed. Although the save schedule will still be valid (because the interest

rate percentage is still on the schedule), you will no longer be able to show that the interest rate used on the schedule came from the rate entry.

Important!

Be aware that if you delete a rate entry you will not only be deleting the current rate value, but you will also be deleting all historical rates in the system for that entry.

Adjustable Loan Definition Administration

Adjustable loans are those that have an initial period of some length, followed by one or more adjustment periods with fixed lengths. Loan payments for the initial period are calculated based on a known interest rate percentage when an adjustable loan schedule is first generated. Once the initial period is over and the loan transitions to the adjustment periods, the interest rate used to calculate the loan's payments is based on the percentage value of a known index (examples are LIBOR, 1-Year Treasury Rate, etc.) plus an added margin.

Since adjustable periods are in the future, and the percentage value of the index that will be used in the adjustment period is not known at the time the schedule is generated, a process is run at the beginning of each adjustment period to look up the current index value (stored as a AMCalc Rate Entry record) and recalculate the payment amounts for the adjustment period. This recalculation process is called *recasting*.

Adjustable loans operate very differently in AMCalc than other loan types. First, adjustable loans have a number of loan term attributes that do not apply to any other loan type. Second, adjustable loan schedules look very different than the schedules of other loan types. Last and possibly the most significant difference, adjustable loan schedules are "living" documents. This is, after they are first generated and saved and, under certain circumstances (the details of which are discussed below), the schedules can be automatically updated by the AMCalc recasting process. See the AMCalc Automated Processes section of this guide for details about how the AMCalc recasting process works

Adjustable loan definitions are used by AMCalc to determine how adjustable loan schedules are built. Through AMCalc Adjustable Loan Definitions, you can package all of the details of how an adjustable loan schedule will operate into one definition. If your organization enters into different types of adjustable loans, you can create a definition for each one. AMCalc calculator users only need to select the appropriate definition and input the other standard loan terms when generating an adjustable loan schedule. So the added benefit of adjustable loan definitions is that they take the complexities out of generating adjustable loan schedules for AMCalc Calculator users.

For more details on how an adjustable loan schedule is generated by the AMCalc calculator and examples of how adjustable loan schedules are formatted, please see the AMCalc User Guide.

The adjustable loan definition administration screen is used to create and maintain definition. Each section of the administration screen is discussed below.



Definition Attributes

* Definition Name

Active? ☐ No

Description

Important!

If this definition is used on a saved loan schedule, the values in the fields marked with * will no longer be editable. You will still be able to do activate the definition which will prevent it from being applied to newly generated loan schedules. See the AMCalc Administration Guide for complete information on using this tool.

Initial Fixed Rate Period

* Initial Period Length (Yrs) *

Select an Option

* Interest Rate *

Select an Option

Rate Adjustments

* Index *

Select an Option

* Margin (%) *

* Adjustment Frequency *

Select an Option

Rate Adjustment Caps and Floors

Initial Cap (%) *

Periodic Cap (%) *

Lifetime Cap (%) *

Initial Floor (%) *

Periodic Floor (%) *

Lifetime Floor (%) *

Adjustable Loan Schedule Recasting Statuses

Recasting statuses

Available

Draft

Pending

Final

Approved

Cancelled

Selected

Definition Attributes

Definition Attributes

* Definition Name

Active? ☐ No

Description

Field Name	Description
Definition Name	The name of the definition. This is the name that users will see when in the AMCalc calculator and creating an adjustable loan schedule.



Active	Toggling active makes the entry available for selection by a user while in the AMCalc calculator. Important: Making a definition inactive removes it from the list of selections when creating new loan schedules but does not remove the entry from previously saved schedules or prevent schedules with those definitions from being recast. The intention of the active/inactive toggle button is to allow you to “retire” adjustable loan definitions so that they are no longer used going forward.
Description	Input any information here that is useful for anyone viewing this definition.

Initial Fixed Rate Period

Initial Fixed Rate Period

* Initial Period Length (Yrs.) †
Select an Option ▼

* Interest Rate †
Select an Option ▼

Field Name	Description
Initial Period Length	The value selected from the drop down list indicates how long the first initial period of the adjustable loan will be in years. The possible values that you can select from are: • 1 yr. • 3 yrs. • 5 yrs. • 7 yrs. • 10 yrs.
Interest Rate	Select the Interest Rate entry that should be used for calculating payments for the initial period. The interest rate selections available in the list are the entries that are marked <i>Active</i> and of type <i>Interest Rate</i> from saved Interest Rate and Index Entries.

Rate Adjustments

Rate Adjustments

* Index †
Select an Option ▼

* Margin (%) †

* Adjustment Frequency †
Select an Option ▼

Field Name	Description
------------	-------------



Index	Select the Index entry that should be used for calculating payments for the adjustment periods in the loan. The index selections available in the list are the entries that are marked <i>Active</i> and of type <i>Index</i> from saved Interest Rate and Index Entries.
Margin (%)	The margin that will be added to the current index percentage at the time of recasting to arrive at the interest rate for each adjustment period. The margin indicated here can be any number equal to or greater than zero.
Adjustment Frequency	The value selected from the drop down list indicates how long each adjustment period of the loan will be. The possible values that you can select from are: • 3 Months • 6 Months • 1 Year • 3 Years • 5 Years

Rate Adjustment Caps and Floors

Rate adjustment caps and floors have not been mentioned yet in our discussion on adjustable loans. Rate caps can be added to adjustable loan definitions in order to limit the amount the interest rate increases from one period to the next or over the life of the loan. Rate floors work the same as caps, but they limit rate decreases instead of rate increases. You can think of rate caps as a kind of insurance policy for borrowers, while rate floors can be thought of as insurance for lenders.

Rate Adjustment Caps and Floors		
Initial Cap (%) + 	Periodic Cap (%) + 	Lifetime Cap (%) +
Initial Floor (%) + 	Periodic Floor (%) + 	Lifetime Floor (%) +

Field Name	Description
Initial Cap (%)	The maximum percentage that the interest rate for an adjustable period (index + margin) is allowed to increase between the initial period and the first adjustment period.
Periodic Cap (%)	The maximum percentage that the interest rate for an adjustable period (index + margin) is allowed to increase between adjustment periods beyond the first adjustment period.
Lifetime Cap (%)	Limits the total amount the interest rate can increase from the initial period's interest rate over the life of the loan.

Initial Floor (%)	The maximum percentage that the interest rate for an adjustable period (index + margin) is allowed to decrease between the initial period and the first adjustment period.
Periodic Floor (%)	The maximum percentage that the interest rate for an adjustable period (index + margin) is allowed to decrease between adjustment periods beyond the first adjustment period.
Lifetime Floor (%)	Limits the total amount the interest rate can decrease from the initial period's interest rate over the life of the loan.

Using Rate Caps to Simulate Worst-Case Scenarios

While all fields in the *Initial Fixed Rate Period* and *Rate Adjustments* sections of the administration screen require an input, all cap and floor fields are optional. You can save a definition without any caps or floors, with only caps, with only floor, or some of each.

However, if you choose to not have any rate caps on a definition, be aware that calculator users will not be able to generate worst-case scenario adjustable schedules. These are schedules that apply the maximum rate cap to each period of the schedule. There are sometimes requirements to provide worst-case scenario examples to clients that you are entering into adjustable loan agreements with. See the *Simulating a Worst-Case Scenario Adjustable Schedule* section of the AMCalc User Guide for more information.

Adjustable Loan Schedule Recasting Statuses

The last section in the adjustable loan definition administration screen allows you to specify which adjustable loan schedules should be recast.

The AMCalc recasting process evaluates two main criteria when determine if an adjustable loan schedule will be recast. The first criterion is whether an adjustable period is starting on the current day, and the second is whether the schedule has a recasting status equal to one saved with the adjustable loan definition that it is associated with.

Which and how many statuses you select to initiate recasting is your company's decision. However, you should try to limit the statuses you select in order to reduce recasting processing times and to keep the recasting history table clean and relevant.

For example, when working with a potential borrower, your company may generate and save many schedules before arriving at the one schedule that meets all of the borrower's needs and the loan goes forward. You would not want the AMCalc recasting process to recast all of the schedules that were created for this borrower when only one of those schedules is relevant to the loan entered into. Keeping the number of recasting status to a minimum will also make reviewing recast history reports easier.

The AMCalc package comes with a list of default loan statuses that your company can use, but you can add or delete from this list by updating the values for the `amortcalc__Status__c` field in the `amortcalc__AmortizationSchedule__c` object.



Adjustable Loan Schedule Recasting Statuses

Recasting statuses ⓘ

Available

Draft

Pending

Approved

Canceled

Selected

Final

Field Name	Description
Recasting Statuses	Select loan schedule statuses from the <i>Available</i> box and then click the arrow to move the status to the <i>Selected</i> box.

Note: If you save an adjustable loan definition without any recasting statuses indicated you are effectively turning recasting off for schedules using that definition!

Important: *Be cautious if you edit or delete a schedule status via the Salesforce Object Manager tool if that schedule status is also selected as a recasting status.* Any edited or deleted schedule status that was previously set as a recasting status will no longer trigger a recast if the Adjustable Loan Schedule has not been updated with the new status value.

Important: The process of recasting loan schedules (ie. recalculating payment amounts as adjustment periods start) is accomplished by a Salesforce Flow action called *AMCalc Adjustable Loan Schedule Daily Recast*. The Flow containing this action was installed with the AMCalc package, but by default is inactive. In order to recast saved adjustable loan schedules, you will need to activate the flow. See the *AMCalc Adjustable Loan Schedule Daily Recast* section of this guide for more information and how to activate the Flow.

Considerations when creating and editing adjustable loan definitions

Because an adjustable loan schedule that is saved today can be recast in the future, the following should be kept in mind when creating and editing definitions.



- Many of the attributes of an adjustable loan definition become un-editable once a schedule has been saved with that definition. The following message box will display on the adjustable loan definition administration screen:

This definition is used by 14 adjustable loan schedules

Important!

If this definition is used on a saved loan schedule, the values in the fields marked with † will no longer be editable. You will still be able to de-activate the definition which will prevent it from being applied to newly generated loan schedules.

See the AMCalc Administration Guide for complete information on using this tool.

As shown in the above example, the message box may have a banner across the top of it if the definition is associated with any saved adjustable loan schedules.

The following definition fields are un-editable once a schedule is saved with the definition:

- | | |
|---|--------------------------------------|
| ☐ Initial Period Length | ☐ Periodic Cap |
| ☐ Interest Rate | ☐ Lifetime Cap |
| ☐ Index | ☐ Initial Floor |
| ☐ Margin | ☐ Periodic Floor |
| ☐ Adjustment Frequency | ☐ Lifetime Floor |
| ☐ Initial Cap | |

The reason these fields become un-editable is to prevent early adjustment periods in the same schedule from being recast under one set of definition attributes, and then later periods being recast under a different set of attributes. Note that these fields will not be editable regardless of the saved schedule's status.

1. You are able to add and remove recast statuses in an adjustable loan definition whenever you want, regardless of whether there are saved schedules with the definition or not. However, keep in mind that loan schedules will be ignored by the AMCalc recasting process if it has un-recast adjustment periods that are in the past.

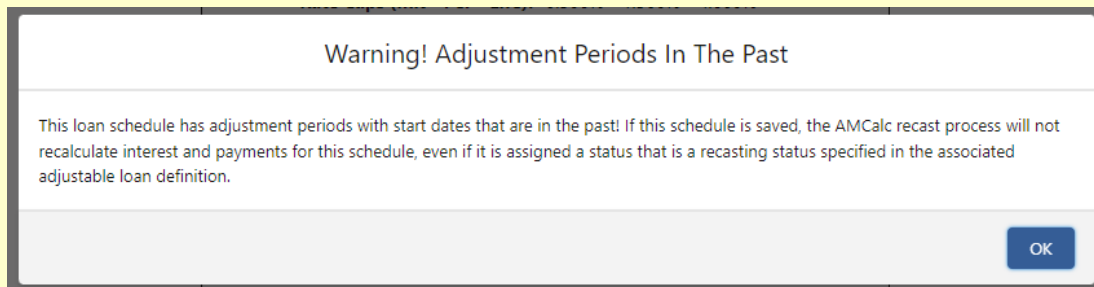
As an illustration, consider the following scenario:

1. An adjustable loan schedule has been saved with a status of *Approved*. The adjustable loan definition the schedule is associated with will only initiate recasting for schedules with a status of *Final*. The first adjustment period for this schedule starts on 9/15/2022 and the second adjustment period for the schedule starts 6 months later on 3/15/2023.
2. In January of 2023, the adjustable loan definition that the schedule is associated with gets modified so that the recasting statuses now include both *Approved* and *Final*.
3. When the AMCalc recasting process runs on 3/15/2023, the first day of the schedule's second adjustment period, the entire schedule will be ignore and not recast even though it

has a status that matches one of the recasting statuses in its definition. This is because the schedule's first adjustment period was never recast on 9/15/2022. This is because on that date the schedule's adjustable loan definition did not include the status of *Approved* as a recasting status.

Before adding or removing recasting status from definitions, be sure to understand how that change will impact the saved schedules using the definition.

Note: *AMCalc calculator users have the ability to generate and save loan schedules that have start dates in the past. If a calculator user generates an adjustable schedule that has adjustment periods in the past, the following warning message will be displayed:*



Digital Experiences Calculator Administration

This tool is used to configure how an AMCalc calculator on a Salesforce Digital Experiences page behaves. The AMCalc Digital Experiences Calculator Administration tab allows you to create and modify these definitions. This section will explain how to use the tool.

Note: Before the release of Winter 21, Salesforce *Digital Experiences* was called Salesforce *Communities*. For the purposes of this guide, the terms Communities and Digital Experiences are synonymous.

Once you have created calculator definitions, see the **AMCalc Calculators for Salesforce Digital Experiences** section in this document to learn how to apply the definitions to a Salesforce Digital Experiences AMCalc calculator.

If you are not familiar with Salesforce Digital Experiences, it is highly recommended that you read the Salesforce help pages on them [here](#). Additionally, you can get hands-on Digital Experiences administration training with Salesforce [Trailhead](#).

To create a calculator definition, click the *New* button, the calculator definition screen will be displayed. This screen is broken into three sections; Definition Attributes, Calculator Definition, and Saved Schedule Definition.

Definition Attributes

Fill in the definition attribute fields that are described below.

Definition Attributes

* Calculator Definition Name

Calculator Definition Name

☐ Active?

Description

Calculator Definition Name

Give the calculator a descriptive name. This name will be shown in a drop down list that the user will select from to apply the definition to a Digital Experiences page.

Active?

When the active box is checked, the definition will be shown in the drop down list and the user configuring the Digital Experiences page will be able to select the definition for the page. If you want to save the definition but are not done defining it, keep this box unchecked so that it cannot be selected on the Digital Experiences definition pages.

Note: If an active calculator definition is applied to a Digital Experiences page calculator and then the definition is made inactive, the definition will not be removed from the Digital Experiences page and the calculator will still function on the Digital Experiences page. Before de-activating a definition that was previously active, be sure to remove it from any Salesforce Digital Experiences page.

Caution: You are able to delete a calculator definition, but if that definition is used in a Salesforce Digital Experiences site, the calculator will display an error when a user goes to the site. For this reason, before deleting a definition, be sure to remove the calculator definition from all Digital Experiences sites.

Description

Provide any additional information about the calculator definition in the Description section.

Calculator Definition

This section allows you to defining what type of loan payment schedule your Digital Experiences AMCalc calculator will generate, the fields that will be displayed, whether they are editable by the user, and a number of other aspects of the calculator.

The top portion of the section is shown below.

Calculator Definition

* Loan Type

Select the loan type
▼

* Term Period Time Unit

Type of time unit to use to specify the loan term
▼

* Calculation Results

The calculation results displayed on screen
▼

All of the input fields in this section are required to have a value to save the definition. Below is description of the fields in this section of Calculator Definition.

Field Name	Description
Loan Type	Select the loan type that will be calculated. Note: Adjustable loans are not supported by Digital Experiences calculators in this release of AMCalc.
Term Period Time Unit	Select either month or year for the time unit that will be used to specify the length of the loan.
Calculation Results	The calculation results field specifies what is displayed to the Digital Experience site user once the loan payment calculation is complete. You can specify whether the user sees only a single fixed payment amount, or whether all payments are displayed to the user. See below for more information.

Below are examples showing the differences between selecting each of the two Calculation Results options.

Payment Calculator Results

\$23,560.00 for 10 years at 2.670000% interest.

Your Payment Amount:

\$223.93

Total of 120 Monthly payments

Show single fixed payment amount

Payment Calculator Results

\$23,560.00 for 10 years at 2.670000% interest.

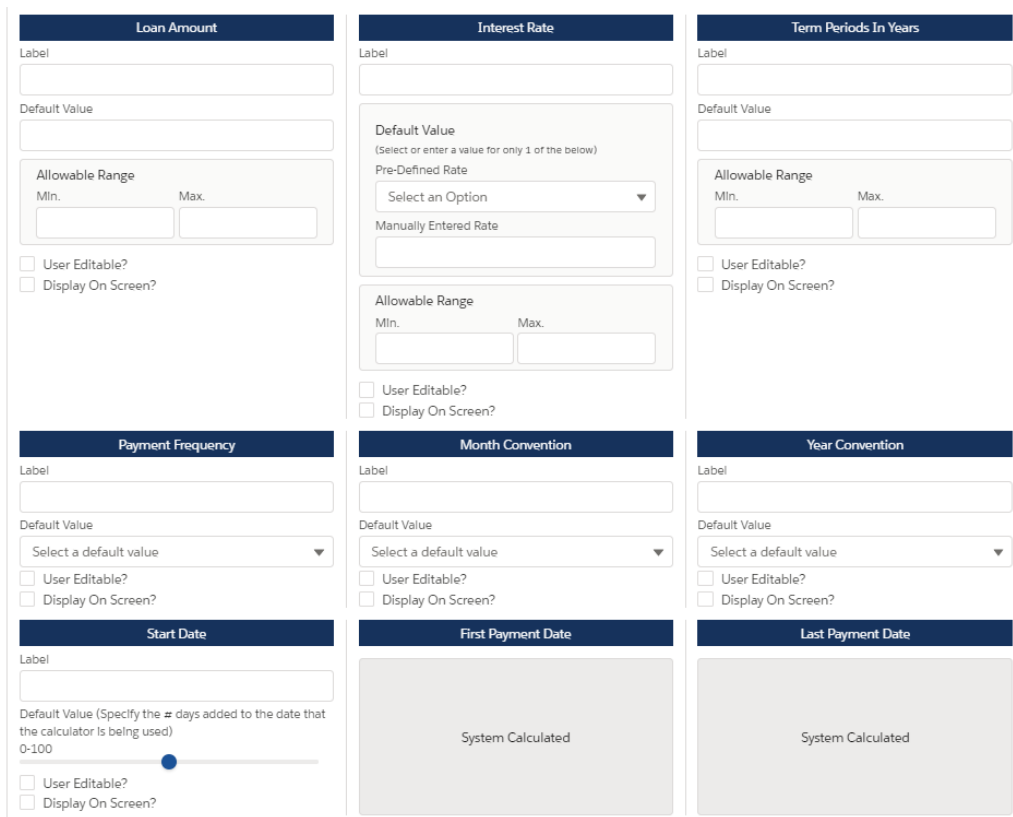
Payment Period	Payment Date	Payment Amount
1	11/20/2020	\$223.93
2	12/20/2020	\$223.93
3	01/20/2021	\$223.93
4	02/20/2021	\$223.93
5	03/20/2021	\$223.93

Total of 120 Monthly payments

Show all schedule payments

Whether a Digital Experiences calculator can or cannot show a single fixed payment depends on the loan type selected. A number of the loan types that AMCalc generates loan payment schedules for have variable loan payments. If you select a loan type that generates a variable payment schedule, and select *Show single fixed payment amount* from the *Calculation Result* drop down list, AMCalc will ignore your selection and instead show all schedule payments to the Digital Experiences user. If your calculator definition selections results in this situation, you will receive a warning message.

The next section of the Calculator Definition screen contains a cell for each calculator input that applies to the loan type that has been selected. Within each cell are the attributes that can be applied to the input.



The screenshot displays the Calculator Definition screen with nine input fields arranged in a 3x3 grid. Each field has a title bar, a label input, a default value input, and an allowable range section. The fields are:

- Loan Amount:** Includes a label, default value, and a range with min/max inputs. Attributes: User Editable?, Display On Screen?
- Interest Rate:** Includes a label, default value (with a note to select one of two options), a pre-defined rate dropdown, a manually entered rate input, and a range. Attributes: User Editable?, Display On Screen?
- Term Periods In Years:** Includes a label, default value, and a range. Attributes: User Editable?, Display On Screen?
- Payment Frequency:** Includes a label, default value (with a dropdown), and attributes: User Editable?, Display On Screen?
- Month Convention:** Includes a label, default value (with a dropdown), and attributes: User Editable?, Display On Screen?
- Year Convention:** Includes a label, default value (with a dropdown), and attributes: User Editable?, Display On Screen?
- Start Date:** Includes a label, default value (with a note and a slider), and attributes: User Editable?, Display On Screen?
- First Payment Date:** A large grey box with the text "System Calculated".
- Last Payment Date:** A large grey box with the text "System Calculated".

Below are descriptions of all of the possible attributes that you may see in a field cell. *Note that not all attributes are applicable to all field types.*

Attribute Name	Description
Label	This is the label for the field that the Digital Experiences user will see when using the calculator. You will only be required to provide a Label value if the field is displayed on screen.
Default Value	The default value that this field will have when the calculator that this

	definition is applied to is used on the Digital Experiences site. If <i>User Editable</i> is checked, the default value can be changed when the calculator is used. If <i>User Editable</i> is not checked, the value cannot be changed by the Digital Experiences site user and the default value indicated in this field is what will be used to calculate the loan payment schedule.
Default Value (Interest Rate cell only)	For interest rate, you can select one of two possible ways to define a default value: 1. Select a pre-defined interest rate entry from the drop down list. When you use an interest rate entry, AMCalc will dynamically insert the current interest rate into the calculator when it is used by the Digital Experiences user. This allows you to change interest rates in the background through the <i>AMCalc Interest Rate Administration</i> tool without having to modify the calculator definition. 2. Input a Manually Entered Rate in the space provided. The rate entered will be static for this definition and you will have to come back to the calculator definition to update the interest rate. These two ways to define a default value for interest rate are mutually exclusive to each other. Only indicate a value for one of the two options. No matter which way you define a default value for interest rate, the same behavior applies in regards to whether <i>User Editable</i> is or is not checked as was described above.
Default Value (Start Date cell only)	For a Digital Experiences calculator, the loan start date defaults to the date that the calculator is being used by the Digital Experiences user. You have the option to dynamically change the start date by adding up to 100 days to the current date by using the slider. For example, if you define your calculator by setting the slider to 45 days, and a Digital Experiences user runs the calculator on October 1st, the start date of the loan will be set to November 15th. Again, checking User Editable or not has the same behavior as described before.
Allowable Range	For fields that take a number value, you can indicate a minimum and maximum value in order to restrict input within a certain range. Allowable range is optional and only relevant when the field is user editable.
User Editable?	Indicates whether the user can or cannot edit the field when they are using the calculator on a Digital Experiences site. If <i>User Editable</i> is checked, <i>Display On Screen</i> must also be checked.
Display On Screen?	Indicates if the field will be displayed on the screen to the Digital Experiences user. If <i>Display On Screen</i> is checked and <i>User Editable</i> is checked, the field will be

	displayed, along with any default value, in the appropriate input field for the data type of the field.
--	---

Note: All calculator inputs require a value when the Digital Experiences user attempts to run the calculator. What this means from the calculator definition perspective is that either:

Each cell must be set to *Display On Screen* and *User Editable* so that the Digital Experiences user can input a value.

-Or-

The field's value must be provided by saving a default value when the calculator definition is created.

Also be aware that the cells shown on the calculator definition screen may vary slightly from one loan type to another, as some loan types require additional input values.

Saved Schedule Definition

When you collect leads through a Digital Experiences calculator, AMCalc saves a loan payment schedule with the lead's contact information. This section allows you to define how the loan payment schedule is saved.

Saved Schedule Definition

Schedule Name Merge Fields

If this definition will be used to collect leads, AMCalc can dynamically build unique schedule names when the schedule is saved with the lead information.

To include the Lead First Name, copy and paste: {!LeadFirstName}
 To include the Lead Last Name, copy and paste: {!LeadLastName}
 To include the Lead Company Name, copy and paste: {!LeadCompany}
 To include the Calculator Definition Name, copy and paste: {!CalculatorDefinition}

Example: A saved schedule name value of {!LeadLastName}-{!LeadCompany} Schedule would result in a schedule name containing the lead's last name, followed by a hyphen, the lead's company name, and the word "schedule", like so **Smith-Acme Inc. Schedule**

Saved Schedule Name

Indicate the name to assign to schedules saved with this definition

Saved Schedule Status

The status assigned to schedules saved using this definition

The below table describe the fields in Saved Schedule Definition section.

Field Name	Description
Saved Schedule Name	Indicate the name that will be set for the saved loan payment schedule. You can utilize the merge fields to have AMCalc name the schedule dynamically in order to better identify the schedule with the lead. The merge fields that you can use are: - The lead's first name: {!LeadFirstName} - The lead's last name: {!LeadLastName}

	• The lead's company name: {!LeadCompany} • The calculator definition name: {!CalculatorDefinition}
Save Schedule Status	Indicate the status to be given to the saved schedule

Once the calculator definition is complete, be sure to click the *Save* button at the top of the tool. AMCalc will validate your definition to ensure that all input values are correct and do not conflict with one another. For instance, if a calculator input field is marked as user editable but the Display on Screen box is not checked, an error message will be displayed so that the issue can be corrected.

AMCalc Schedule Emailing Administration

Schedule emailing allows your user to send emails to contacts and leads with information about the loan schedule that has been generated for them. The email sent will consist of the email message with an attached PDF document that contains the generated loan payment schedule. As an administrator, you will create emailing settings that the user selects from that then generates the email message and attachment for the user. Using the email settings, you can create standardized messages to contacts and leads and include required disclaimers and legal notices, for example. See the AMCalc User Guide for information on how emailing settings are used to send loan payment schedules.

In order for your users to use the AMCalc loan schedule emailing functionality, you must create at least one email setting for the user to select from. At a minimum, the email setting will need to have a setting name and the attachment file name will need to be defined. However, as you read through this section of the guide you will see the importance of defining thorough emails settings as they will allow you users to easily send loans schedule information out quickly and consistently.

There are two sections in the Schedule Emailing administration tool; *Email Message Defaults* and *Loan Schedule Attachments Defaults*.



*Name
Name for this emailing setting

Available Schedule Emailing Merge Fields

Use the merge fields below to insert loan schedule information into the text of the email message or loan schedule attachment.

Schedule Name: {{ScheduleName}}
Schedule Status: {{ScheduleStatus}}
Loan Amount: {{LoanAmount}}
Interest Rate: {{InterestRate}}
Loan Start Date: {{StartDate}}
First Payment Date: {{FirstPayment}}
Last Payment Date: {{LastPayment}}
Loan Term: {{Term}}
Payment Frequency: {{PaymentFrequency}}
Number of Payments: {{NumberPayments}}
Total Interest Paid: {{TotalInterest}}

Email Message Defaults

☐ User can edit message settings values before sending emails

Subject
Default email subject

Message

Salesforce Sans 12 B I U

Default email message text

The table below describes the fields for the *Email Message Defaults* section.

Field Name	Description
Name	The name of the email setting. This is the name that users will see when selecting the setting to use.
User can edit message settings values before sending emails	Check this box to allow the user to change the message settings values (Subject and Message) before they send out emails. If you leave this box unchecked, users cannot edit the email subject or message values configured in the setting
Subject	The default subject text and merge fields for the email using the setting.
Message	The default email message text and merge fields for the email using the setting.

As indicated in the descriptions above, you have the option to include merge fields within the text of the email subject or message. When a merge field is used, AMCalc will pull loan schedule information from the schedule that is being emailed and dynamically insert it in the location of the merge field before the email is sent.

Note: you can apply formatting to merge fields (bold, text color, etc.), but if you do, be sure that it is applied to the **entire** merge field. This includes both the opening and closing brackets. For example, a correctly bolded merge field would be **{{!mergefield}}**, not **{{!mergefield}}**.



Loan Schedule Attachment Defaults ?

☐ User can edit attachment settings values before sending emails

* File Name

File name of attached PDF loan schedule (.pdf will be added)

Title

Default title on the loan schedule

Subtitle

Default subtitle on the loan schedule

Schedule Header

Salesforce Sans 12 [Color Picker] [B] [I] [U] [List Icon] [Text Icon] [Link Icon] [Unlink Icon] [Align Left Icon] [Align Center Icon] [Align Right Icon] [Text Color Icon]

Default schedule attachment header text

Schedule Footer

Salesforce Sans 12 [Color Picker] [B] [I] [U] [List Icon] [Text Icon] [Link Icon] [Unlink Icon] [Align Left Icon] [Align Center Icon] [Align Right Icon] [Text Color Icon]

Default schedule attachment footer text

The table below describes the fields for the *Loan Schedule Attachment Defaults* section.

Field Name	Description
User can edit attachment settings values before sending emails	Check this box to allow the user to change the attachment settings values before they send out emails. If you leave this box unchecked, users cannot edit any of the attachment values configured in the setting
File Name	The default attachment file name for the PDF attachment sent with the email. Merge fields can be used in this field to customize the file name. The attachment file name extension will be defaulted to .pdf for the user.
Title	The text and merge fields for the title of the schedule attachment. Leave this field blank to not have a title in the schedule attachment.
Subtitle	The text and merge fields for the subtitle of the schedule attachment. Leave this field blank to not have a subtitle in the schedule attachment.
Schedule Header	The text and merge fields for a header that is inserted into the schedule attachment. Leave this field blank to not include a header in the schedule attachment.
Schedule Footer	The text and merge fields for a footer that is inserted into the schedule attachment. Leave this field blank to not include a footer in the schedule attachment.

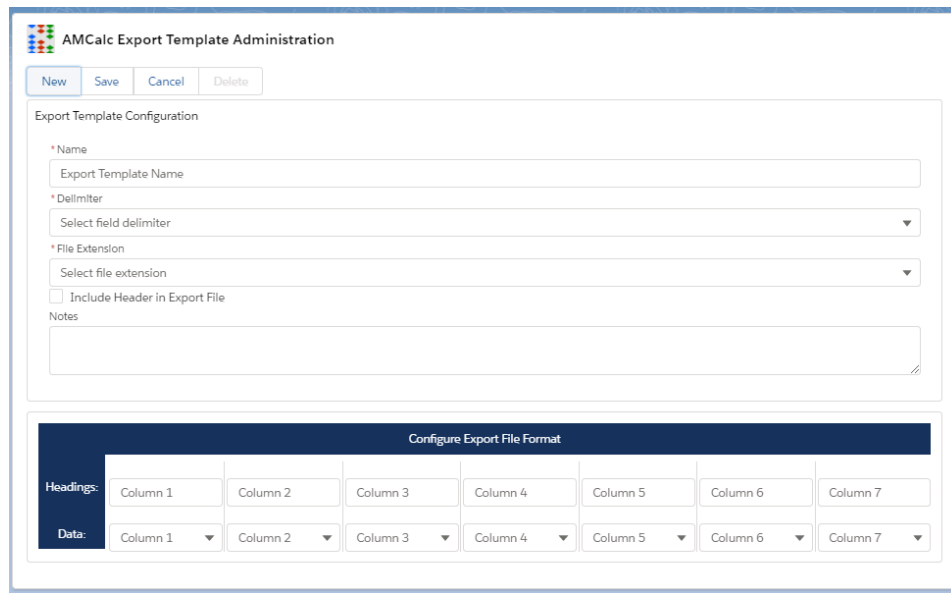
As described in the email message section above, loan schedule information can be dynamically inserted into the attachment pdf file when the email is sent by using merge fields. As before, if using formatting with merge fields, be sure to include the entire merge field from opening bracket to closing bracket (see the yellow box above).

To see an example of how a loan schedule pdf file is generated with a title, subtitle, header, and footer, click the question mark icon at the top of the *Loan Schedule Attachment Defaults* section.

AMCalc Export Template Administration

When viewing a saved loan payment schedule, users have the option to export information from the schedule. Your users may want to export loan payment schedule information so that the loan payment schedule can be formatted and included in customer presentation packets, or to quickly upload payment amounts and dates to a payment processing system. To perform the export they will pick a saved export template and select either an email or record attachment as the export method. See the AMCalc User Guide for details on how export templates are used.

The AMCalc Export Template Administration tool allows you to define export templates that users can select from. The table below explains the input fields required to create an export template.



The screenshot shows the 'AMCalc Export Template Administration' window. It has a title bar with a logo and the text 'AMCalc Export Template Administration'. Below the title bar are four buttons: 'New', 'Save', 'Cancel', and 'Delete'. The main area is divided into two sections. The top section is titled 'Export Template Configuration' and contains the following fields: a text input for 'Name' (labeled 'Export Template Name'), a dropdown for 'Delimiter' (labeled 'Select field delimiter'), a dropdown for 'File Extension' (labeled 'Select file extension'), a checkbox for 'Include Header in Export File', and a text area for 'Notes'. The bottom section is titled 'Configure Export File Format' and contains a table with two rows: 'Headings' and 'Data'. The 'Headings' row has seven columns labeled 'Column 1' through 'Column 7'. The 'Data' row has seven columns, each with a dropdown menu labeled 'Column 1' through 'Column 7'.

Field Name	Description
Name	The name of the export template. This is the name that users will see when selecting the template to use.
Delimiter	Select either a comma as the field delimiter to create a CSV file or a tab to create a tab delimited export file.
File Extension	Select either .TXT or .CSV for the default file extension
Include Header in Export File	When selected the column headings specified in the <i>Configure Export File Format</i> section are included in the export file. To include only schedule information with no headers, keep this box unchecked.
Notes	Include any additional information about the template in the text area
Configure Export File Format – Headings	To include a specific column heading in the file include it here. If you leave this field blank, the heading value will be defaulted when the data field for the column is selected. Note that even though values are shown in the headings fields, they will not be included in export files if the <i>Include Header in Export File</i> check box is not checked.
Configure Export File	Select the data that will go into each column of the export file in the order in

Format – Data	which you would like it to appear in the file. You are not required to select data for each available column. If you want an export file that contains only the payment date and the payment amount then only configure those two columns. If you would like to have blank columns in the export file select <i>Blank (no data)</i> from the drop down. To remove a column from a previously saved export template, select the <i>Remove Column</i> entry. Once saved, the column will be removed from the template and columns to the right will be shifted left.
----------------------	--

When you have completed your export template, click the *Save* button at the top of the form.

AMCalc General Settings

As of AMCalc version 2.1, the general Settings tool includes the two sections described below.

AMCalc Automated Processes Status

This is a display only section that shows the status of the automated processes that comes with the AMCalc package. A green or red light will indicate whether each process is currently activated or not activated. To learn more about each of the three processes, including how to activate or de-activate them, see the *AMCalc Automated Processes* section of this guide.

AMCalc Automated Processes Status			
Status	Process Name	Process Type	
	Convert AMCalc Schedule with Lead	Salesforce Process Builder	
	Adjustable Loan Daily Recast	Salesforce Flow	
	Loan Payments Extractor	Salesforce Flow	

 = Activated  = Not activated

Loan Payments

The loan payments section of the General Settings tool allows you to configure AMCalc payments functionality. Once configured and activated, upcoming loan payment information will be pulled daily from saved schedules and sent to the payment processor or Salesforce object that you have configured.

How Does It Work?

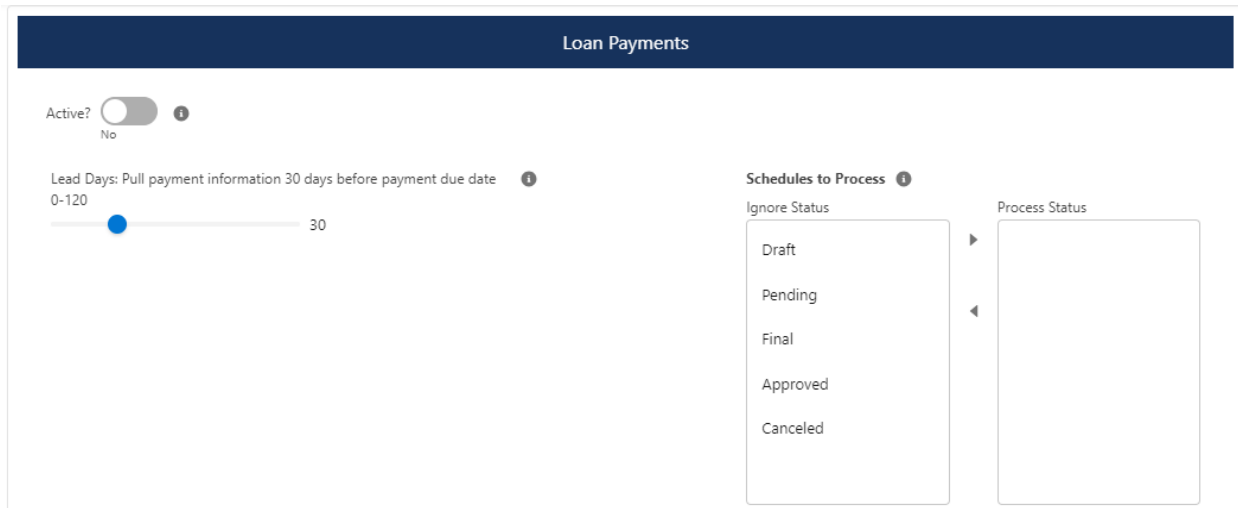
First, you will configure criteria that will be used to determine which schedules should be evaluated for payments due. This is done in the Loan Payments section of the General Settings tool. Next, you will map the payment information. Mapping the payment information defines where and what loan payment information will be sent once it is pulled from the saved schedules that met the criteria. Last, you will turn on (activate) an automated background process that will run daily and use the criteria and

payment mappings that you created to send the payment information to the Salesforce object that you selected during the mapping process. See the *AMCalc Automated Processes* section of this guide on how to activate this background process.

When payment information from a loan schedule is sent to the mapped payment object, a reference to the payment record created will be added back to the loan schedule so that users can see payment details when viewing loan schedules.

Configuring Loan Payments

To set up payments, scroll down to the Loan Payments section of the General Settings tab and configure the criteria that will be used to pull payment information. See the table below for details on configuring the criteria



Field Name	Description
Active?	Click the toggle to Yes to make the loan payment criteria active so that it will be used by the Loan Payments Extractor automated process. Note that if this toggle switch is set to <i>No</i>, loan payments will not be pulled from saved schedules even if the Salesforce Flow that runs the AMCalc payment action is activated. See the <i>AMCalc Automated Processes</i> section in this guide for more information.
Lead Days	Use the slide controller to indicate how many days <i>before</i> a payment's due date that a payment should be pulled from a schedule. Note that the lead time indicated here is <i>inclusive</i>. See the yellow box below for more information.
Schedules to Process	Select the status or statuses that a loan schedule must have in order for it to be evaluated for payments.

Note: There are two things to keep in mind when configuring the above loan payment criteria.

First, it is the combination of Lead Days and Schedule Status that is considered when pulling payments from schedules. For example, if a schedule is saved with one of the selected statuses, it will be looked at by the AMCalc payments Flow action. But if that schedule has no payments due within the Lead Days that has been configured, no payment information will be pulled from that schedule.

Second, Lead Days are inclusive. This means that payment information *may* be pulled from schedules that have payments due *earlier* than lead days indicated if those payments had not been pulled by earlier payment runs.

An example scenario for this would be when a schedule with a payment due earlier than the indicated lead days was recently saved with a status that is included in the Schedules to Process control.

Also note that multiple payments from a single schedule may be pulled in the same run if more than one payment in the schedule is within the lead days configured and those payments had not been pulled previously.

One of the benefits of making Lead Days inclusive is that it makes the AMCalc payment process self-recovering should there be an issue running the loan payments automated process (such as accidentally de-activating the process so it does not run for a period of days).

Once you have indicated the payment pull criteria, scroll down in the page farther to indicate where loan schedule payment information will be sent and to configure the payment field mappings.



* Send Payment Info to Salesforce Object

Select ▼

Payment Field Mapping

Use the dropdown on the left to select the Salesforce object to send loan payment information to. Then map the AMCalc schedule information below to fields in the object selected. You must fill in a mapping for at least the Amount Due and the Payment Due Date. All other field mappings are optional. See the AMCalc Configuration and Administration Guide for complete information on mapping payment fields.

* Amount Due	Map to Type = Currency ▼
* Payment Due Date	Map to Type = Date or Date/Time ▼
Schedule Name	Map to Type = Text or Text Area ▼
Schedule Status	Map to Type = Text or Text Area ▼
Total # of Payment Periods	Map to Type = Number ▼
Payment Period	Map to Type = Number ▼
Period Start Date	Map to Type = Date or Date/Time ▼
Principal Outstanding Amount	Map to Type = Currency ▼
Principal Reduction Amount	Map to Type = Currency ▼
Interest Paid Amount	Map to Type = Currency ▼
Payment Pull Date	Map to Type = Date/Time ▼

Here are the steps to perform:

1. Select a Salesforce object to send the loan schedule payment information to using the dropdown list under the *Send Payment Info to Salesforce Object* label. You can select from any standard or custom Salesforce object. We refer to the object that is selected here as the *target* object.

Important: Be sure that the Salesforce user that the loan payment flow will be running under has **query** and **create** privileges on the object that you have selected so that the flow can create payment records when it runs.

2. Once the target object has been selected, the dropdown lists on the right-hand side of the screen will become enabled and can be used to map fields from saved loan schedules to the target object.

AMCalc makes this mapping process easy for you. Keep these things in mind while performing the mapping:

- *Amount Due* and *Payment Due Date* are required in your mapping. All other loan schedule fields listed below these two fields are optional.
- Each dropdown list will only show fields of the correct data type in the target object that corresponds with the data type of the loan schedule field. For example, if you are mapping



- the *Payment Due* field, only currency fields from the target object will be shown in the dropdown list.
- If the target object does not contain a date or currency field that *Amount Due* and *Payment Due Date* can be mapped to, you will need to create a new custom field in the target object since these two fields are required to save a mapping.
 - Each field in the target object can only be mapped to a loan schedule field once.
 - If you configured one or more lookup relationships for AMCalc that are the same as a lookup relationship contained in the target object, you will be able to include that in the mapping. For example, if both AMCalc and the target object have a relationship with the Salesforce Account object, you can have the AMCalc payment action add the Account Id associated with the loan schedule to the payment record that it creates in the target object.
 - Any **required** fields contained in the target object must have a value assigned to it for the AMCalc flow action to successfully create a payment record in the object. Once the target object is selected, AMCalc will display the required fields for that object on the screen. *To ensure that each required field has data inserted in it, it must either be included in your mapping or have a default value configured using some other method such as the Salesforce Object Manager screen or an Apex trigger.*

Once your payment field mapping is complete, click the Save button in the General Settings screen.

To initiate the pulling of payment information on a daily basis, you will need to activate the AMCalc payment action in the Salesforce Flow screen. See the *AMCalc Automated Processes* section of this guide for details of how to do that.

Configuring Payment Details for Viewing

As mentioned in the previous section, once payments have been pulled from loan schedules and sent to the target Salesforce object that you have mapped, AMCalc users can see information about each payment when viewing loan schedules. See the AMCalc user guide for examples of how users access payment information when viewing a loan schedule.

AMCalc uses a specifically named field set called *AMCalcPaymentInfo* saved in the target payment object to determine what information to display to users. You can add any of the fields in the target object to this field set.

To configure the field set, use the Object Manager screen in Setup. Once in the object manager screen, find the Salesforce object that you selected in the Loan Payment section of the General Settings screen and select *Field Sets* from the left-hand side of the screen. Click the New button and input *AMCalcPaymentInfo* for both the Field Set Label and Field Set Name, and indicate a description for Where is this used.



New Field Set

Field Set Edit		Save	Cancel
Enter Field Set information			
Field Set Label	AMCalcPaymentInfo		
Field Set Name	AMCalcPaymentInfo		

Click Save and, in the next screen, perform the same steps that you followed in the *Configuring Loan Payment Schedule Headers* section of this guide to place the fields you would like AMCalc loan schedule viewers to see into the AMCalcPaymentInfo field set.

Once you have placed all the fields you like in the field set, save your changes.

Important: In order for AMCalc to find the field set, it **must** be located in the mapped target object and named *AMCalcPaymentInfo*.

Important: A new feature in AMCalc 3.0 is the ability of AMCalc users to manually add or remove payment associations to schedule periods. This is performed while viewing a saved loan schedule and selecting the *Associate Payments* menu item from the upper right-hand corner of the schedule view dialog box.

Before the *Associate Payments* functionality can work, all of the steps detailed in the *Configuring Loan Payments* section and the *Configuring Payment Details for Viewing* section must be completed. In other words, even if you plan to **not** enable automated payment feeds from AMCalc schedules to your payment system using the AMCalc Flow action, you will still need to complete the information described in this section in order for users to manually associate payments.

Deploying AMCalc Calculators for Salesforce Digital Experiences

Earlier in this document you learned how to create AMCalc Calculator Definitions. In this section you will learn how to apply those definitions to an AMCalc Calculator for Digital Experiences component.

Digital Experiences calculators are fully configurable not only in how the calculator operates (as defined by the Calculator Definition that it uses), but also in what is displayed to the Digital Experiences user. Button labels, on-screen messages, whether lead information is collected or not, and much more can all easily be configured. This allows you to use wording that makes sense to your prospects or users, as well as company branding within your Digital Experiences sites.

AMCalc calculators for Digital Experiences can be added to Salesforce Digital Experiences sites that are publicly available (for example, Internet users can access them without having to login to Salesforce), or they can be added to Digital Experiences sites that named users login to. Additionally, multiple calculators can be deployed on either the same Digital Experiences site or on different Digital Experiences sites. Each can generate a specific type of schedule, as well as have its own look and feel.

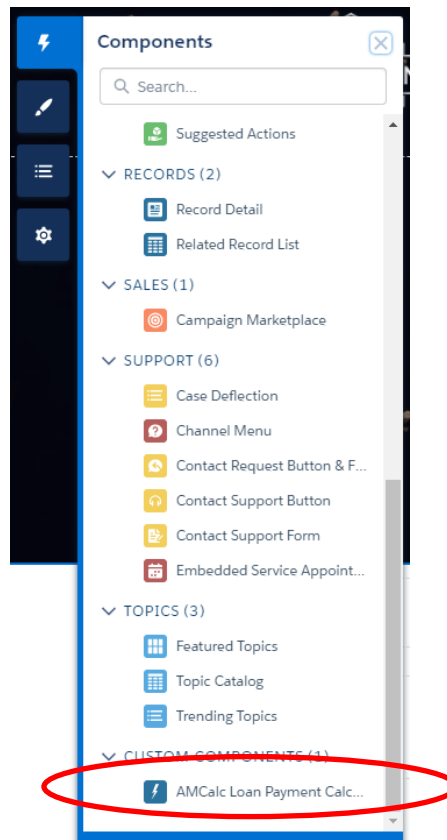
This section assumes that you already know how to create and administer Salesforce Digital Experiences sites. If you do not, please familiarize yourself with the Salesforce documentation on the subject which can be found [here](#). Additionally, you can get hands-on Digital Experiences administration training with Salesforce [Trailhead](#).

The sections that follow assume that you already have a Digital Experiences site created. If you do not, create one or see the Salesforce documentation on Digital Experiences referenced above.

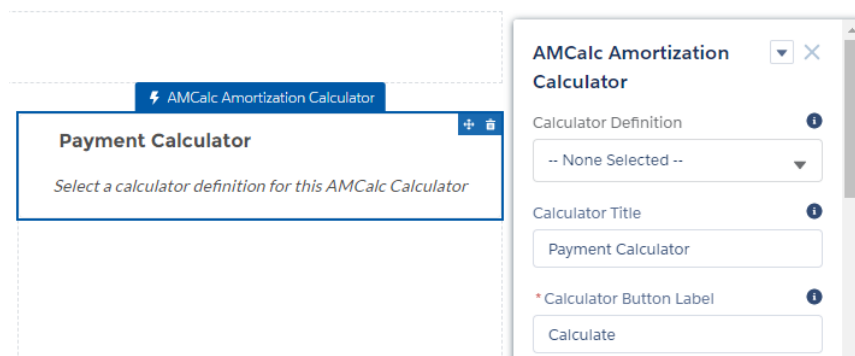
Configuring an AMCalc Calculator for a Digital Experiences Site

To add an AMCalc calculator to your site, navigate to the site's Builder by typing *All Sites* into the Setup menu's quick find box.

In the component list, scroll down to the Custom Components section and drag and drop the *AMCalc Loan Payment Calculator* component onto the page.



The AMCalc calculator component will prompt you to select one of the calculator definitions that you created earlier from the component attribute menu.



Use the table below to configure all of the component attributes for your AMCalc calculator. While filling in the attribute information, you can also hover your mouse pointer over the information icon next to each attribute to view information about the attribute.



Attribute Name	Description
Calculator Definition	Select the saved AMCalc Calculator definition that you created earlier to apply to this calculator. As stated before, the calculator definition drives the type of loan payment schedule that will be generated and the inputs into the loan payment calculator. Once you have selected a calculator definition from the drop down, the AMCalc Loan Payment Calculator component will refresh and you will see the calculator fields that are in the definition.
Calculator Title	The title that display at the top of the component.
Calculator Button Label	The label on the button that the user will click to run the calculator
Payment Dialog Pop-Up Title	The title at the top of the pop up dialog that is shown when the results of the calculation are complete.
Display Loan Description?	To display a short description of the loan terms in the results pop up, select the check box. An example of a loan description is <i>"\$10,000.00 for 10 years at 2.5% interest"</i>.
Payment Amount Label	The label next to the calculated payment amount.
Total Payment Label	If you would like to display the sum of the payments made over the life of the loan (ie. principal plus interest), input a label here. If you do not wish to display this information, leave this attribute blank.
Display Payment Description?	Check the box to display a short description of the payment terms in the result pop up. An example of a payment description is <i>"Total of 120 Monthly payments"</i>.
Additional Payment Information	Add any additional text that you would like to display to the user in the results dialog such as disclaimers and legal notices in this field.
Payment Pop-up Dialog Close Button Label	The label on the button that the user clicks to close the result dialog and go back to the calculator.
Calculator Error Message	Input a generic error message that the users sees if there are any issues running the calculator. Tip: Keep this attribute blank while you are configuring and testing your site. Then, if there are issues running the calculator, error specific messages will be returned by the AMCalc calculator engine. This will make it easier to resolve the issue. Once you are ready to go live, the error specific messages may not make sense to your end users, so you can add a generic error message here along with information on how the user can contact your company for help.
Collect Leads?	Check this box if you will be collecting lead information with this calculator.

	All attributes below the collect leads checkbox are only relevant when you <i>are</i> collecting leads. Important: As indicated before, you must have a lookup relationship established between AMCalc and the Salesforce Lead object in order to collect all lead information through AMCalc Digital Experiences calculators. If you do not have an established relationship between AMCalc and Lead, when a calculator user submits contact information, the lead record will be created but no loan schedule will be created and associated with the lead record. See the Relating AMCalc Schedules to Other Salesforce Objects section at the beginning of this guide for instructions on creating the AMCalc/Lead relationship.
Lead Input Form Button Label	The label on the button that the user will click to open up the lead information input form. If you are <i>not</i> collecting leads, this button will not be displayed on screen.
Lead First Name Label	The label for the lead first name input field. Leave this field blank to not display the lead first name input field on the form.
Lead Last Name Label	The label for the lead last name field. This field is required to create a lead record, so a value must be input in this field.
Lead Company Label	The label for the lead's company name. This field is required to create a lead record. If your users are individuals that are not associated with a company, change the default value of this attribute to "none" to not display the company field on the lead input form. AMCalc will then replicate the lead's last name to the company name field on the lead record.
Lead Email Label	The label for the lead email input field. Leave this field blank to not display the lead email input field on the form. Note: There must be at least one contact method displayed for the lead. If you do not display the email field, you must display the lead phone number field.
Lead Phone Number	The label for the lead phone number input field.



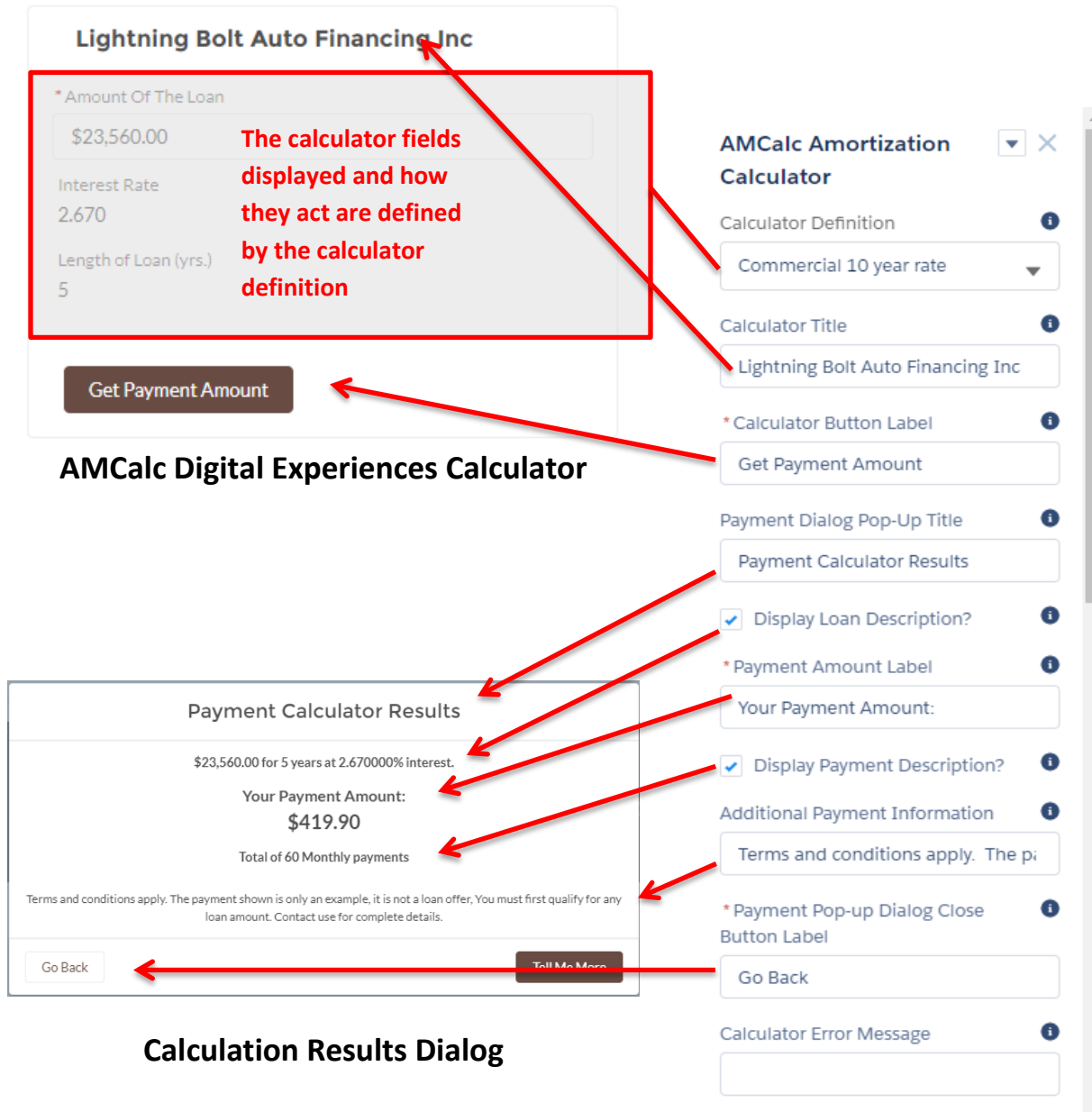
Label	Leave this field blank to not display the lead phone number input field on the form. Note: there must be at least one contact method displayed for the lead. If you do not display the phone number field, you must display the lead email field.
Lead Additional Information	To provide a text area field for the lead to input any additional information, input a field label here. Leave blank to not display the field on the form.
Lead Source	When creating a lead record in Salesforce, the Lead Source is a required field. Select the lead source from the drop down to assign to lead records created from this AMCalc calculator. If your company gets leads through multiple sources, the Lead Source field is a good way to uniquely differentiate how a lead was collected.
Lead Status	Lead Status is another field that is required to create a lead record. Select the Lead Status to assign to a lead from this calculator.
Submit Lead Button Label	The label on the button that the user clicks to submit their lead information.
Submit Lead Button Click Message Title	The title of a message box that pops up when the user click the submit button.
Submit Lead Button Click Message Text	The text in the message box that pops up when the user click the submit button.
Convert Schedule To	Select the Salesforce object that the loan payment schedule created by this lead will be converted to when a Salesforce user converts the lead record. When the Digital Experiences user clicks the button to submit their lead information, a lead record is created and details of their loan is associated with that lead record. When a Salesforce user later converts the lead record to a contact, AMCalc moves that loan payment schedule to the Salesforce object indicated here. See the AMCalc and Process Builder section for more information. If you are unfamiliar with the Salesforce lead conversion process, see these Salesforce help pages. Note that only those Salesforce objects that already have a relationship with AMCalc will be listed in the <i>Convert Schedule To</i> drop down list. To add a relationship, see the Relating AMCalc Schedules to Other Salesforce Objects section at the beginning of this guide.



	Important: In addition to having a lookup relationship established between AMCalc and the Salesforce Lead object to collect leads, you will also need to activate the <i>Convert AMCalc Schedule with Lead</i> Process Builder entry in order to move AMCalc schedules upon lead conversion. This process was installed as part of the AMCalc package, but is inactivated by default. See <i>Convert AMCalc Schedule with Lead</i> in the <i>AMCalc Automated Processes</i> section of this guide for more information and how to activate this process.
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Example: How Digital Experiences Attributes Display on the Screen

The diagrams below are provided to help you understand how the attribute values set for AMCalc Digital Experiences calculators look on screen.



Lightning Bolt Auto Financing Inc

*** Amount Of The Loan**
\$23,560.00

Interest Rate
2.670

Length of Loan (yrs.)
5

Get Payment Amount

AMCalc Amortization Calculator

Calculator Definition
Commercial 10 year rate

Calculator Title
Lightning Bolt Auto Financing Inc

*** Calculator Button Label**
Get Payment Amount

Payment Dialog Pop-Up Title
Payment Calculator Results

☒ **Display Loan Description?**

*** Payment Amount Label**
Your Payment Amount:

☒ **Display Payment Description?**

Additional Payment Information
Terms and conditions apply. The p:

*** Payment Pop-up Dialog Close Button Label**
Go Back

Calculator Error Message

Payment Calculator Results

\$23,560.00 for 5 years at 2.670000% interest.

Your Payment Amount:
\$419.90

Total of 60 Monthly payments

Terms and conditions apply. The payment shown is only an example, it is not a loan offer. You must first qualify for any loan amount. Contact us for complete details.

Go Back **Tell Me More**

AMCalc Digital Experiences Calculator

Calculation Results Dialog



Payment Calculator Results

\$23,560.00 for 5 years at 2.670000% interest.

Your Payment Amount:
\$419.90

Total of 60 Monthly payments

Terms and conditions apply. The payment shown is only an example and is not a loan offer. You must first qualify for any loan amount. Contact us for complete details.

First Name

* Last Name

Email

Phone Number
(999) 999-9999

Additional Information

Lead Info Input Form

☒ Collect Leads? ¹

Lead Input Form Button Label ¹

Lead First Name Label ¹

* Lead Last Name Label ¹

* Lead Company Label ¹

Lead Email Label ¹

Lead Phone Number Label ¹

Lead Additional Information ¹

* Lead Source ¹

* Lead Status ¹

* Submit Lead Information Button Label ¹

* Submit Lead Button Click Message Title ¹

* Submit Lead Button Click Message Text ¹

* Convert Schedule To ¹

Configuring the Digital Experiences Guest User Account

Salesforce Digital Experiences sites can be configured so that they are accessible by users that are not authenticated by Salesforce (i.e. they are not required to login). Digital Experiences site that do not require a login are public sites available to any Internet user with a link to the site. This is one of the most common ways to use AMCalc calculators to collect leads.

This type of Digital Experiences site uses a special Salesforce guest user account when they access the Digital Experiences' web pages. Each Salesforce Digital Experiences site that you create within your Salesforce org will have its own unique guest user account and all unauthenticated users coming to a site share the guest user account when they access its pages. To learn more about guest users, see this [Salesforce documentation](#).

For security reasons, the guest user account is treated and administered differently from typical Salesforce user accounts. This section will describe how to give the proper permissions to a guest user account so that AMCalc schedules can be generated and contact information can be gathered when unauthenticated site users, your company's leads, run the AMCalc calculator.

The following table describes the specific access that will be granted to a site's guest user once you have completed all of the steps in this section.

Object Name	Access
Lead	Record create access so that the prospect can leave their contact information.
Amortization Schedule	Record create access so that the loan details that the prospect is requesting can be saved.
Calculator Definition	Read only access so that the calculator definition that is configured for the Digital Experiences site can be read and the calculator displayed on the screen for the prospect.
Interest Rate Entry	Read only access so that any interest rate entries configured within the calculator definition can be read and used in the loan payment calculation.

Configuring the guest user account is a three step process. Since each separate Digital Experiences site has its own unique guest user account, if you are deploying AMCalc on more than one Digital Experiences site, you will need to perform these three steps for each guest user account.



Step 1: Add the AMCalc permission set to the guest user account

Navigate to the Digital Experiences builder for the site and click the settings icon on the bottom of the left-hand side of the screen:



A profile with the same name as your Digital Experiences site will be shown under the Guest User Profile heading. Click the profile name to open up the profile page, and then click the *View Users* button at the top of the profile page. Now click on the Site Guest User name listed for the site. Scroll down to the Permission Set Assignments list, click the *Edit Assignments* button, add the **AMCalc Amortization Schedule Create (Digital Experiences user)** permission set to the Enabled Permission Set box, and click the *Save* button.

Step 2: Grant create access to the Lead object

While still in the guest user account page, click the profile name link for the guest user to go to the profile page and then click the Edit button. Scroll down the page to the Standard Object Permissions section and click the check box under the *Create* column next to the Lead object.

	Basic Access		
	Read	Create	Edit
Engagement Channel Types	☐		
Ideas	☐		
Individuals	☐	☐	
Leads	☒	☒	
Locations	☐	☐	

When you check the *Create* box, the *Read* check box will automatically be selected too. This is standard behavior. Scroll down to the bottom of the page and click the *Save* button

Step3: Create sharing rules

For the final step, type the word Sharing into the Quick Find box in the Setup menu and then click the *Sharing Settings* menu item shown under the Security heading. Scroll down the page until you find the sections labeled *Calculated Definition Sharing Rules* and *Interest Rate Entry Sharing Rules*.



For both the CalculatorDefinition Sharing Rules and the Interest Rate Entry Sharing Rules, perform the following steps:

1. Click the New button to create a new sharing rule.
2. Enter a label for the rule such as “AMCalc Digital Experiences read access”, press the tab button to copy the label to the Rule Name field, and add a description.
3. In the *Step 2: Select your rule type* section, select the *Guest user access, based on criteria* option.
4. In the *Step 3: Select which records to be share* section you will be entering one criteria. In the Field drop down, select *IsActive*. In the Operator drop down, select *equals*. Click the magnifying icon next to the Value field and select *True*.
5. In the *Step 4* section, select the Digital Experiences guest user name that this sharing rule will apply to. If you only have one Digital Experiences site, the guest user name should already be defaulted.
6. Lastly, ensure that *Read Only* is selected in the *Step 5* section and then click *Save*.

A confirmation box should come up asking you to confirm your changes, click *Ok*. Your Salesforce system will now run a background process to apply the sharing rule you just created to data in your system. When the background process is complete you will receive an email indicating so.

Below is a screen print of a completed sharing rule.



Step 1: Rule Name

Label

AMCalc Communities read a

Rule Name

AMCalc_Communities_read_

Description

Communities guest user read access to active interest rate information

Step 2: Select your rule type

Rule Type

☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

By modifying the default settings in accordance with these criteria, you are allowing immediate and anyone, because this sharing rule grants access to guest users without login credentials. To secure cases and implications and implement security controls that you think are appropriate for the sens exposure of your data to unauthenticated users related to this change from default settings.

Criteria

Field	Operator	Value	
IsActive	equals	True	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Step 4: Select the users to share with

Share with

AMCalcTest Site Guest User

Step 5: Select the level of access for the users

Access Level

Read Only

Save

Cancel

Your Digital Experiences site's guest user account should now have the permissions that will allow Internet users to access and use AMCalc loan payment calculators on the site, generate payment information, and submit their contact information as a lead.

Testing Your AMCalc Digital Experiences Site

Once you activate your Digital Experiences site and publish it, you can test that the site is publically accessible from the Internet and that lead information and AMCalc schedules are being generated as expected.

Note: The internal process that saves a loan payment schedule via a Digital Experiences calculator is slightly different than how a loan payment schedule is saved for a logged in Salesforce user. When a prospect submits their contact information from a Digital Experiences site, the Lead record is created and the loan term information is immediately committed to your Salesforce database. However, the full payment schedule is saved in the "background". This background processing can sometimes take a minute or two to complete.

The reason it is done this way is because payment schedules consist of many individual records and

saving them can take time. So that prospects are not waiting too long after they submit their information, AMCalc breaks up the saving of the lead information, loan terms, and payment schedule this way.

Be aware of this while you are testing your site. If you submit lead information via the AMCalc Digital Experiences calculator and then immediately look up the lead you submitted in Salesforce, the corresponding loan payment schedule may not yet be showing in its related list. If you come back to the lead a few minutes later, (you may have to press your browser's refresh button) the loan schedule will be there.

If you are having trouble accessing or using the site, ensure that you have completed all of the following:

1. Your Digital Experiences site has been Activated and published successfully.
2. You have completed all of the steps in the **Configuring the Digital Experiences Guest User Account to Run AMCalc Calculators** section above and received a confirmation email from Salesforce that the sharing rules that you created have successfully been saved.
3. An AMCalc loan payment calculator has been added to your Digital Experiences' web page and the web page it is on does not require a login for it to be accessed.
4. A lookup relationship has been created between the Amortization Schedule object and the Lead object.

AMCalc Automated Processes

The AMCalc package comes with automated processes that are used to perform background processing. You can see a listing of the automated processes that come in the AMCalc package by navigating to the General Settings tab in the AMCalc administration tools. Here each automated process is listed along with the type of automated process it is and whether the process is activated or not.

AMCalc Automated Processes Status			
Status	Process Name	Process Type	
●	Convert AMCalc Schedule with Lead	Salesforce Process Builder	
●	Adjustable Loan Daily Recast	Salesforce Flow	
●	Loan Payments Extractor	Salesforce Flow	
● = Activated ● = Not activated			

The following sections discuss each of these processes in detail and how your organization can leverage them to help automate your business.

Convert AMCalc Schedule with Lead

The *Convert AMCalc Schedule with Lead* process triggers when a lead that has an AMCalc loan schedule associated with it is converted to a contact. The purpose of this process is to move the loan payment schedules associated with a lead to a contact, account, or opportunity record during lead conversion.

If your company is *not* going to be converting leads that have AMCalc loan schedules associated with them, you can skip this section. If you are, read on to learn how the AMCalc lead conversion process works.

Process Builder			
My Processes 1 Items			
PROCESS ▲	DESCRIPTION	OBJECT	PROCESS TYPE
> Convert AMCalc Schedule with Lead	When a Lead is converted, this process will re-asso... Lead	Lead	Record Change

How Does It Work?

As you learned earlier in this guide, the AMCalc calculator generates loan schedules that can then be saved to a “parent” Salesforce standard or custom object. The schedule is then accessible on the detail page of the parent object via a related list.

Standard Salesforce functionality includes *lead conversion*. When a lead is converted, a contact record is created from the lead and the newly created contact record is associated with an account and, optionally, an opportunity. After conversion, the original lead record no longer exists, so any AMCalc loan schedule that is associated with the lead needs to be moved to a new parent record so that your users still have access to it.

If there is a lead record with one or more associated AMCalc loan schedules attached to it, and that lead record is converted to a contact, account, and possibly an opportunity, which new parent record is the AMC schedule moved to? That depends on a couple of things;

- First, schedules can only be moved to parent objects that have a pre-existing relationship with AMCalc. This was described in the *Relating AMCalc Schedules to Salesforce Objects* section of this guide.
- Second, the value of the *On Lead Conversion, Move Schedule To* field that is saved with the schedule. This value can be set two ways;
 1. Via the calculator definition for a Digital Experiences AMCalc calculator. See *the Convert To* field in the *Configuring an AMCalc Calculator for a Digital Experiences Site*.
 2. By the user when saving a generated loan schedule while on the lead screen. If users manually create schedules for leads, the schedule will have an *On Lead Conversion, Move Schedule To* field in addition to the Schedule Name and Schedule Status fields.



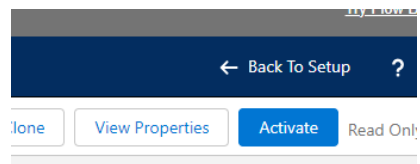
This drop down field will allow the user to select Contact, Account, or Opportunity, but only if a relationship already exists with each of the objects. Optionally the user can choose to not move the schedule.

Once the “move to” value is set on the loan schedule that is saved with the lead record, if that lead is converted to a contact, the *Convert AMCalc Schedule with Lead* automated process will use that value to re-parent the schedule to the selected new parent.

Activating the Schedule Conversion Process

To activate this process, type *Process Builder* into the Setup Quick find box and click on the Process Builder link. Click the arrowhead to the left of the *Convert AMCalc Schedule with Lead* entry to expand the display and then click on the “Convert AMCalc Schedule with Lead” link.

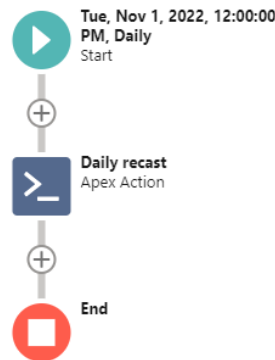
Now simply click on the *Activate* button in the upper-right hand corner to activate it.



AMCalc Adjustable Loan Schedule Daily Recast

This automated process is implemented as a Salesforce Flow template. Salesforce Flows allow you to build and implement sophisticated business processes via an easy to use graphical interface that depicts the flow as a diagram. To learn more about Salesforce Flows and how to use flow templates, see [these Trailhead modules](#).

The AMCalc recast flow is labeled *AMCalc Adjustable Loan Schedule Daily Recast* in the flow definitions list (type *Flows* into the Setup Quick Find box). Clicking on the flow name will bring you into the Flow Builder screen where you can view the details of the flow.



How Does It Work?

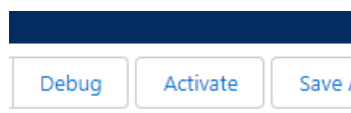
As you can see by the diagram, the AMCalc recast flow, by default, is very simple and only contains two actions. The first simply starts the flow on a daily basis at 12 PM, and the second is the AMCalc recast code that queries saved schedules to determine if any of them contain adjustment periods starting on the current day. If there are, the AMCalc recast process recalculates payments for the period using current index values, updates the schedule with new payment values, and creates a recast history entry to record its actions.

One of the main benefits of the AMCalc recast process being implemented as a Salesforce Flow template is that you can use it as a starting point to create a flow to meet more specific needs of your company. For example, if there is additional logic or notifications that your company would like performed either before or after the AMCalc recast process runs, you are able to add it to the flow. Review the Salesforce Flow documentation for more information on working with flows.

Important: One change to the default AMCalc recast flow that should be considered to better meet your business processes is the timing of when the flow starts. As described, by default, the flow starts daily at 12 PM. **For accurate payment calculations, it is important that all index values are up to date each time the recast process begins.** For this reason, you may want the flow to start later in the day, or even during the night, in order to ensure that those in your organization that are responsible for updating index values have had adequate time to do so.

Activating the Recast Flow

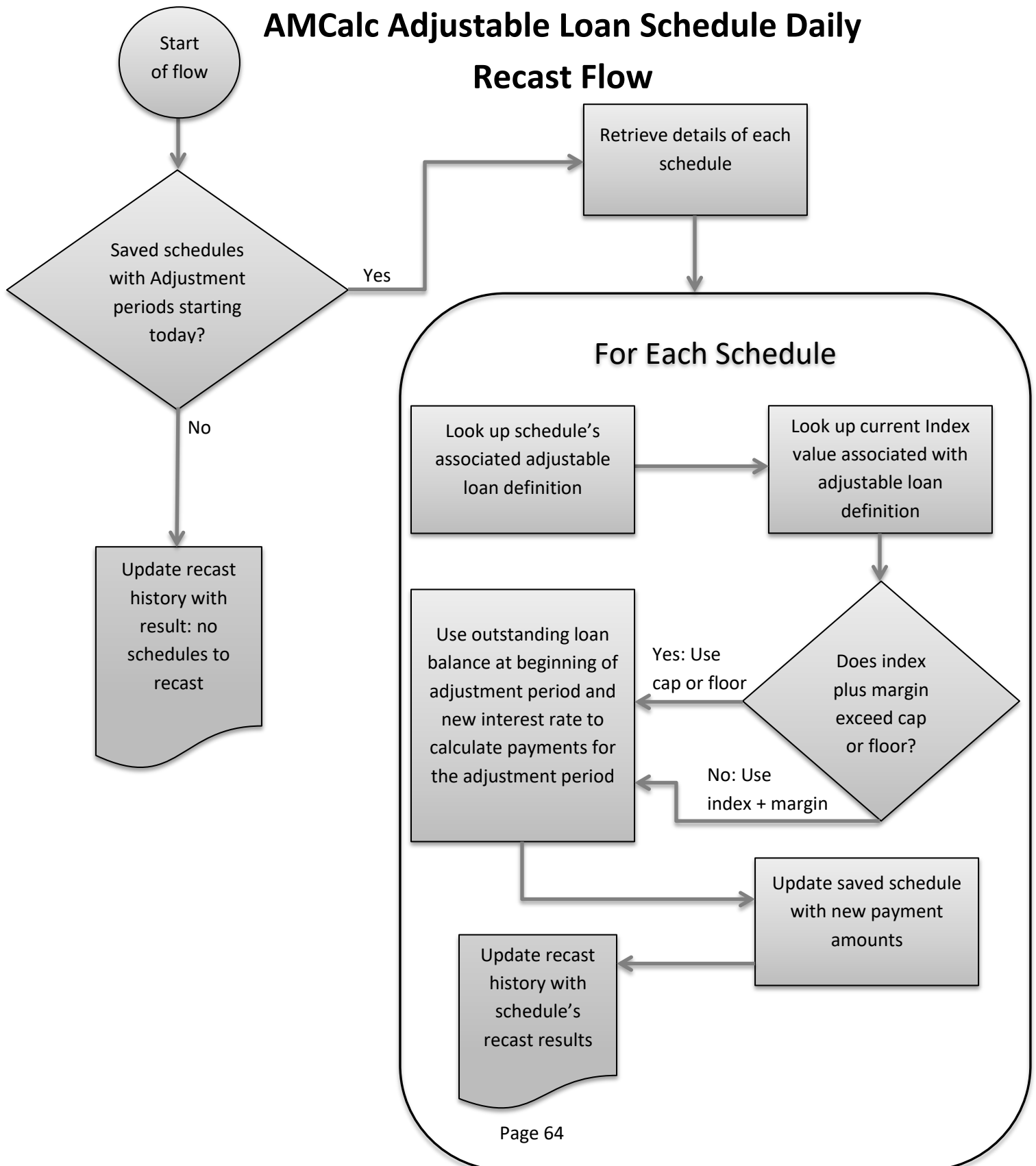
By default, the AMCalc Adjustable Loan Schedule Daily Recast flow is installed deactivated. In order to process recasts for adjustable loan schedules and save recast history records, click the *Activate* button when in the Flow Builder screen to active the process. Once activated, you should see at least one record added to the recast history table each day (see below).





Below is a graphical depiction of the logic that the recast flow process goes through each time it runs.

AMCalc Adjustable Loan Schedule Daily Recast Flow



**Example: Adjustable loan schedule before and after recast**

Below are examples of what an adjustable loan schedule looks before and after a recast process run.

For more examples and additional information on adjustable schedules, see the AMCalc User Guide. For brevity, only the relevant parts of the loan schedule are shown.

Before recast:

The partial schedule below shows an adjustable loan when it is first generated. The interest rate for the initial period is the only rate that is known at this time, so only the payment amounts for the initial period can be calculated. The first adjustment period, 1.1, starts in period 13.

Period	Adjustment Period	Period Rate	Period Start	Period End	Principal Outstanding	End of Period Principal Reduction	Interest Amount	Total Payment
1		4.500%	11/17/2021	12/17/2021	267,500.00	689.22	1,003.12	1,692.34
2		4.500%	12/17/2021	1/17/2022	266,810.78	691.80	1,000.54	1,692.34
3		4.500%	1/17/2022	2/17/2022	266,118.98	694.39	997.95	1,692.34
4		4.500%	2/17/2022	3/17/2022	265,424.59	697.00	995.34	1,692.34
5		4.500%	3/17/2022	4/17/2022	264,727.59	699.61	992.73	1,692.34
6		4.500%	4/17/2022	5/17/2022	264,027.98	702.24	990.10	1,692.34
7		4.500%	5/17/2022	6/17/2022	263,325.74	704.87	987.47	1,692.34
8		4.500%	6/17/2022	7/17/2022	262,620.87	707.51	984.83	1,692.34
9		4.500%	7/17/2022	8/17/2022	261,913.36	710.16	982.18	1,692.34
10		4.500%	8/17/2022	9/17/2022	261,203.20	712.83	979.51	1,692.34
11		4.500%	9/17/2022	10/17/2022	260,490.37	715.50	976.84	1,692.34
12		4.500%	10/17/2022	11/17/2022	259,774.87	718.18	974.16	1,692.34
13	1.1	TBD	11/17/2022	12/17/2022	259,056.69	TBD	TBD	TBD
14	1.2	TBD	12/17/2022	1/17/2023	TBD	TBD	TBD	TBD
15	1.3	TBD	1/17/2023	2/17/2023	TBD	TBD	TBD	TBD
16	1.4	TBD	2/17/2023	3/17/2023	TBD	TBD	TBD	TBD
17	1.5	TBD	3/17/2023	4/17/2023	TBD	TBD	TBD	TBD
18	1.6	TBD	4/17/2023	5/17/2023	TBD	TBD	TBD	TBD
19	2.1	TBD	5/17/2023	6/17/2023	TBD	TBD	TBD	TBD
20	2.2	TBD	6/17/2023	7/17/2023	TBD	TBD	TBD	TBD

**After recast:**

The same schedule from above is now shown below after the first adjustment has been recast. On 11/17/2022 the AMCalc recast process looked up the current index rate for that day, added the margin, and recalculated the payments for the adjustment period.

Period	Adjustment Period	Period Rate	Period Start	Period End	Principal Outstanding	End of Period Principal Reduction	Interest Amount	Total Payment
1		4.500%	11/17/2021	12/17/2021	267,500.00	689.22	1,003.12	1,692.34
2		4.500%	12/17/2021	1/17/2022	266,810.78	691.80	1,000.54	1,692.34
3		4.500%	1/17/2022	2/17/2022	266,118.98	694.39	997.95	1,692.34
4		4.500%	2/17/2022	3/17/2022	265,424.59	697.00	995.34	1,692.34
5		4.500%	3/17/2022	4/17/2022	264,727.59	699.61	992.73	1,692.34
6		4.500%	4/17/2022	5/17/2022	264,027.98	702.24	990.10	1,692.34
7		4.500%	5/17/2022	6/17/2022	263,325.74	704.87	987.47	1,692.34
8		4.500%	6/17/2022	7/17/2022	262,620.87	707.51	984.83	1,692.34
9		4.500%	7/17/2022	8/17/2022	261,913.36	710.16	982.18	1,692.34
10		4.500%	8/17/2022	9/17/2022	261,203.20	712.83	979.51	1,692.34
11		4.500%	9/17/2022	10/17/2022	260,490.37	715.50	976.84	1,692.34
12		4.500%	10/17/2022	11/17/2022	259,774.87	718.18	974.16	1,692.34
13	1.1	4.830%	11/17/2022	12/17/2022	259,056.69	695.64	1,042.70	1,738.34
14	1.2	4.830%	12/17/2022	1/17/2023	258,361.05	698.44	1,039.90	1,738.34
15	1.3	4.830%	1/17/2023	2/17/2023	257,662.61	701.25	1,037.09	1,738.34
16	1.4	4.830%	2/17/2023	3/17/2023	256,961.36	704.07	1,034.27	1,738.34
17	1.5	4.830%	3/17/2023	4/17/2023	256,257.29	706.90	1,031.44	1,738.34
18	1.6	4.830%	4/17/2023	5/17/2023	255,550.39	709.75	1,028.59	1,738.34
19	2.1	TBD	5/17/2023	6/17/2023	254,840.64	TBD	TBD	TBD
20	2.2	TBD	6/17/2023	7/17/2023	TBD	TBD	TBD	TBD

Recast History:

Shown below is a snippet of the recast history report for the above recast.

☐ Recast Date ↑	☐ Amortization Schedule	☐ Adjustable Loan Definition	☐ Recast Result	☐ Recast Result Description
☐ 11/17/2022 (1)	Adjustable Loan Schedule: Recast example	Retail Adjustable 20 yr	Success	The recasting of adjustment period 1 of 38 completed successfully. The starting schedule period for this recast is 13

Understanding recast history entries

The recast history table is updated each time the recast process runs and will contain details regarding all of the information that was evaluated for each schedule that was recast during the flow's run.

If the AMCalc recast process found no adjustable schedules to be recast on the day that it runs, there will be a single entry in the recast history table indicating that the recast process ran successfully but found no schedules to process.

If there are schedules to recast on the day the process runs, there will be one entry in the recast history table for each schedule that was processed.

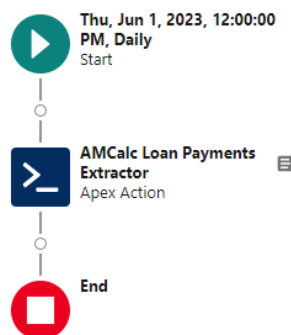
Below is a description of each data point that is saved in the recast history table.

Field Name	Description
Recast Number	Unique sequential number identify the recast history table entry
Schedule Name	The name of the schedule being recast
Recast Date	The date and time of the recast run
Adjustable Loan Definition	Name of the adjustable loan definition associated with the schedule
Adjustment Period Recast	The schedule's adjustment period that is being recast
Total Number of Adjustment Periods	Total number of adjustment periods in the schedule. When <i>Adjustment Period Recast</i> is equal to the value in this field, the entire schedule has been recast.
Index Rate Entry	The name of the index rate entry associated with the schedule's adjustable loan definition.
Index Rate	The value of the associated index at recast run time
Margin	The margin specified in the schedule's adjustable loan definition
Calculated Period Interest Rate	The index rate value at recast run time plus the margin
Initial Interest Rate	The interest rate that was used for the schedule's initial period
Previous Period Rate	The previous period's interest rate. If this is the first adjustment period in the schedule, the value stored here will be the same value as that shown in the <i>Initial Interest Rate</i> field. Otherwise it will be equal to the interest rate that was applied to the previous adjustment period.
Initial To Period Rate Change	The change in interest rate between the schedule's initial period and this period's <i>Calculated Period Interest Rate</i> . This value is used for lifetime cap and floor evaluation.
Period to Period Rate Change	The change in interest rate between the schedule's previous adjustment period and this period's <i>Calculated Period Interest Rate</i> . This value is used for Initial and periodic cap and floor evaluation.
Initial Cap	The initial cap value specified in the schedule's adjustable loan definition
Periodic Cap	The periodic cap value specified in the schedule's adjustable loan definition
Lifetime Cap	The lifetime cap value specified in the schedule's adjustable loan definition
Initial Floor	The initial floor value specified in the schedule's adjustable loan definition
Periodic Floor	The periodic floor value specified in the schedule's adjustable loan definition
Lifetime Floor	The lifetime floor value specified in the schedule's adjustable loan definition

Interest Rate Applied To Period	The interest rate that was used to perform the recast for the adjustment period. The value specified in this field is the result of calculating the difference between the <i>Calculated Period Interest Rate</i> and the previous period's interest rate, and then determining if any caps or floors are applicable to the period. This value is the one that will be shown in the <i>Period Rate</i> column when viewing the schedule.
Rate Limit Applied	If the <i>Interest Rate Applied To Period</i> is the result of applying a cap or floor, the name of the cap or floor that was used will be specified here
Recast Result	Indicates whether the recast process completed successfully or not
Recast Result Description	Short description of the result of the recast run. If the recast process found no schedules to be processed for the day, the <i>Recast Result</i> field will indicate "Success", and this field will contain the description "The Recast process ran successfully. There are no schedules found with adjustable period start dates for the current date, [date]". Additionally, in this scenario the majority of the fields listed above will contain no values. If this history record does describe a schedule recast, this field will contain a description similar to: "The recasting of adjustment period 1 of 38 completed successfully. The starting schedule period for this recast is 13"

AMCalc Loan Payment Extractor

The *AMCalc Loan Payment Extractor* is also implemented as a Salesforce Flow template. This means that you can use it to create a sophisticated flow customized for your company's needs. For instance, the template contains the Apex Action (see the image below) that returns a result *Status* and result *message* once it completes. You can add a flow action to email this result information to an administrator as a way to monitor daily payment processing.





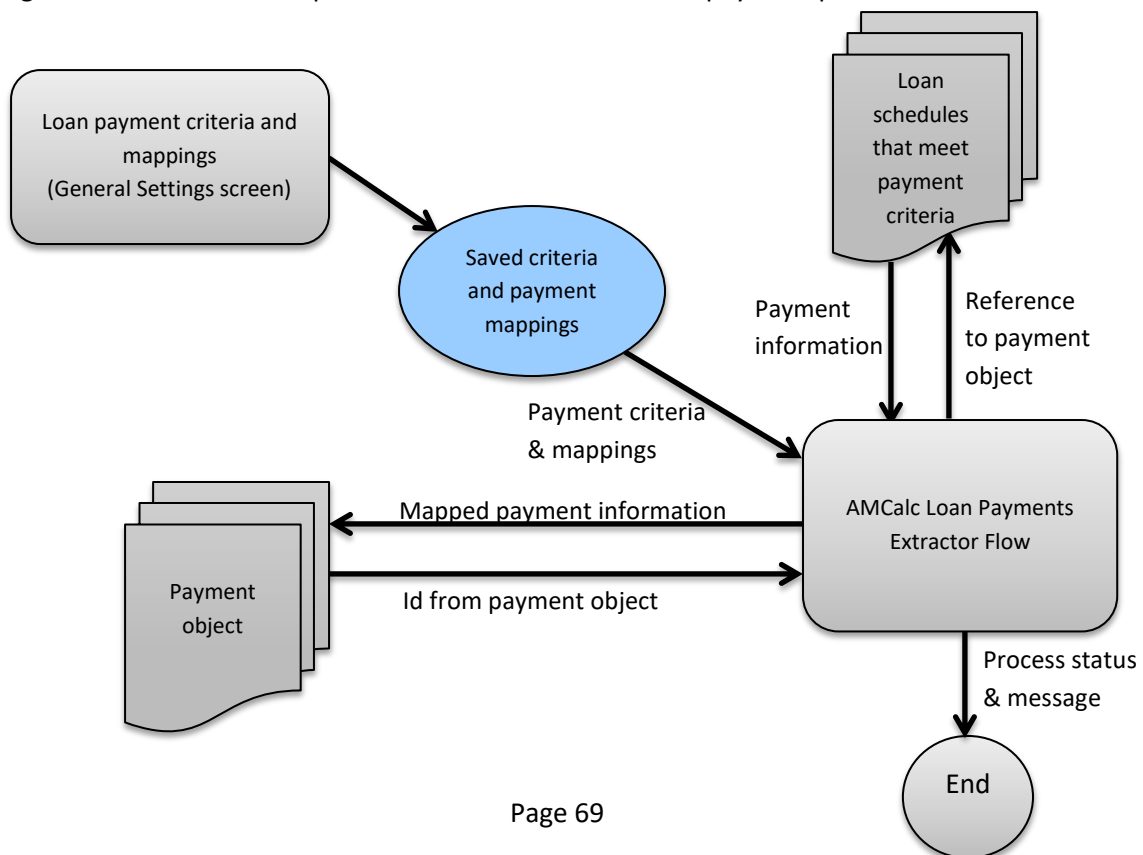
Important: One change to the default AMCalc Loan Payments Extractor flow that should be considered to better meet your business processes is the timing of when the flow starts. By default, the flow starts daily at 12 PM. For your business needs, it may be more appropriate to process payment information at a different time of day.

How Does It Work?

The AMCalc Loan Payment Extractor uses the information that you saved in the Loan Payments section of the General Settings tools to determine which saved loan schedules should be evaluate for payments due. If a loan schedule is found to have payments within the lead days time frame that has been indicated, the payment and other schedule data, per the saved payment mapping, is pulled from the schedule and used to create a new payment record in the target Salesforce object. A reference to the new payment record that was created is then added back to the corresponding loan schedule so that users viewing the schedule can see details of each payment.

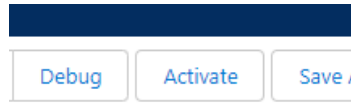
Important: Be sure that the Salesforce user that the AMCalc Loan Payment Extractor flow will be running under has **query** and **create** privileges on the target payment object so that the flow can create payment records when it runs.

The diagram below is a visual representation of the AMCalc loan payment processes and flow.



Activating the Payments Flow

By default, the AMCalc Loan Payment Extractor flow is installed deactivated. In order to pull payments from saved loan schedules and send them to the target payment object, click on the AMCalc Loan Payments Extractor entry in the flow listing (type Flows in the Setup quick find box). Then, once in the flow builder screen, click the *Activate* button in the upper right hand corner of the screen.



Using the Payments Flow Outputs

After each run of the AMCalc Loan Payments Extractor, a result status and result message is output by the AMCalc action that processes the payment information. You can use these outputs to further customize the payments flow for your purposes. For instance, you can email the results to an administrator or other user by using Salesforce's Send Email flow action as a way to monitor daily payment processing.

Both the result status and result message are *collections*. You can read the Salesforce flow documentation for info on collection variables, but basically it means that there can be multiple statuses and messages that are output from a single AMCalc Loan Payments Extractor run.

Usually, however, there will only be a single status and message that is output (it is still a collection, just with a collection size of 1). For a typical run where all payments were processed successfully, the *Status* would equal "success" and the message might say something like:

AMCalc loan payment processor results: 4 of 4 payment records completed successfully. 4 payment entries have been created in target object My_Payment_Object__c. The run criteria was Loan Schedule Status = Final AND due date within 30 days inclusive. The process completion timestamp is 6/27/2023, 3:24 PM

An error or warning (result *Status* = "error" or result *Status* = "warning") for the entire payment process will also result in only a single status and message. But be aware that if there are errors in processing individual payment records, the collection size will be greater than one for both status and message and that some records may have a status of success while those that errored will have a status of error.

AMCalc Reports and Dashboards

The AMCalc package includes over 70 predefined reports and 4 predefined dashboards. All of the predefined AMCalc reports can be found in the reports folder called *AMCalc Standard Reports*.

Modifying AMCalc Reports

Since no Salesforce standard or custom object relationships to AMCalc exist at the time of the package installation, all 70+ reports that come with the package only report on AMCalc data. Once you have established relationships between AMCalc and other Salesforce objects, you will likely want to create additional AMCalc reports that include data from those relationships. You can use some of the reports that come with AMCalc as the basis to create new reports (via the report clone function) or build new reports from scratch.

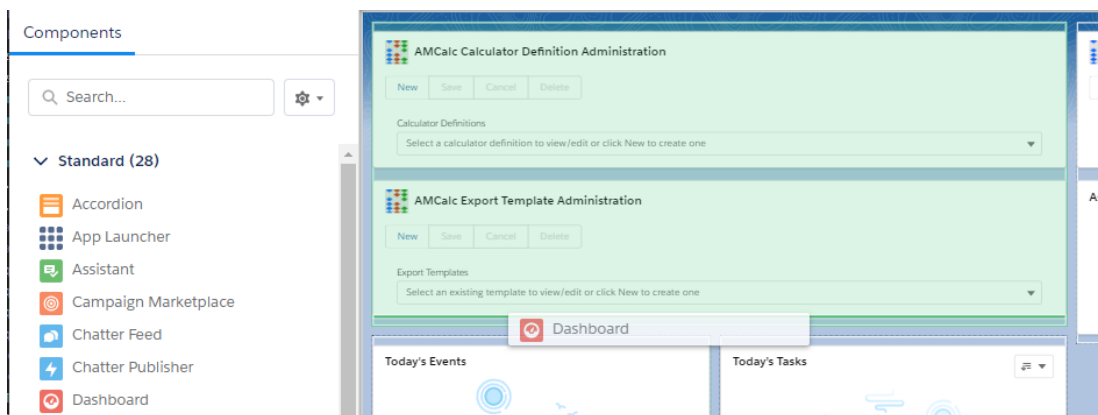
In either case, if you create your own AMCalc reports from scratch or modify AMCalc reports that are installed with the package, it is highly recommended that you save those reports in a folder other than the *AMCalc Standard Reports* folder. The reason for this is that future upgrades to the AMCalc package may include modified reports or modifications to the *AMCalc Standard Reports* folder. Moving your own reports to a different folder will prevent them from being overridden with future AMCalc upgrades.

For help on creating reports in Salesforce, see this [Salesforce documentation](#).

Using AMCalc Dashboards

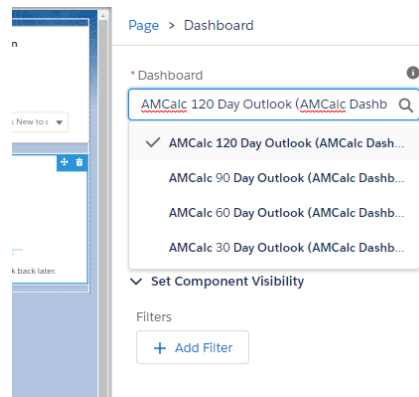
The four dashboards that come with the AMCalc package are designed to give your users either a 30, 60, 90, or 120 day outlook of the loan payment schedules in your system. Dashboards are added to Home pages of a Salesforce app. To add a dashboard to a home page:

1. Navigate to the home page, click the gear icon in the upper right-hand corner of the web page to open up the menu, and select *Edit Page*.



2. Drag the Dashboard component from the Components menu (under the Standard section) on the left-hand side of the screen and drop it onto the page.

3. On the right-hand side of the screen select the dashboard that you would like to display from the Dashboard dropdown.



4. Set any visibility that is required, save, and activate the page.

Additional AMCalc Resources

Be sure to check the Blogs and How To's section of the 3 Creeks Technologies web site (www.3creekstech.com) for more information about how to get the most out of AMCalc. The web site is regularly updated with articles and how to guides.

If you have any questions about AMCalc installation, configuration, or administration, please contact us at support@3creekstech.com.