JOB AID

Comparison Feature Walkthrough

New side-by-side product & rate comparison workflow

The new Comparison feature lets you build a side-by-side view of up to five products or rate scenarios, so you can weigh options at a glance and move into lock and assignment with confidence. This job aid shows where the feature lives and how to build, view, edit, save, and reopen a comparison.

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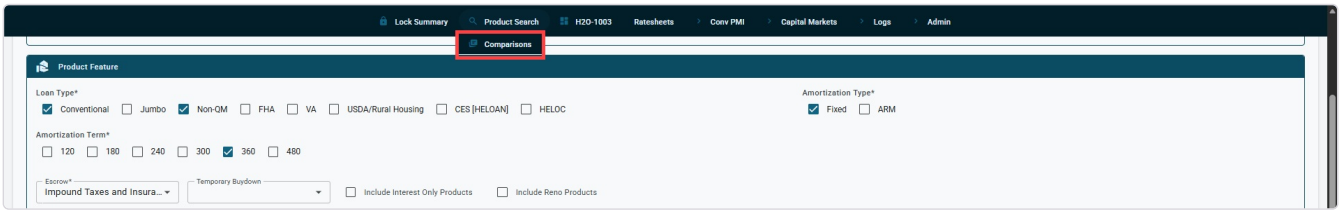
1 Find the Comparison tab

Located under the Product Search header

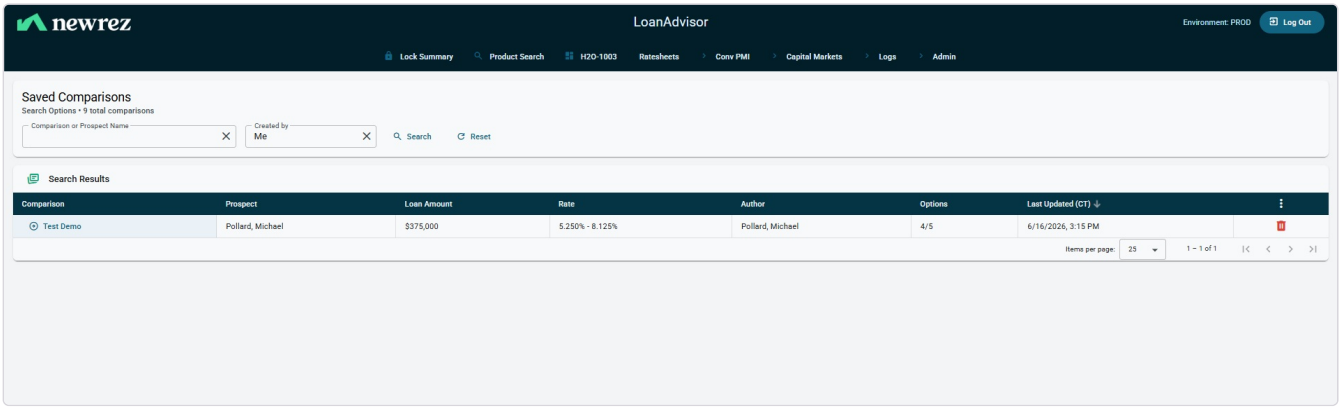
- A new **Comparison** tab now appears under the Product Search header.
- It gives you a direct entry point to the comparison workspace.
- From here you can view every saved comparison with its snapshot details — a single landing page for managing all of your comparison work.



2 Open the Comparisons landing page

Click Comparisons from the Product Search tab

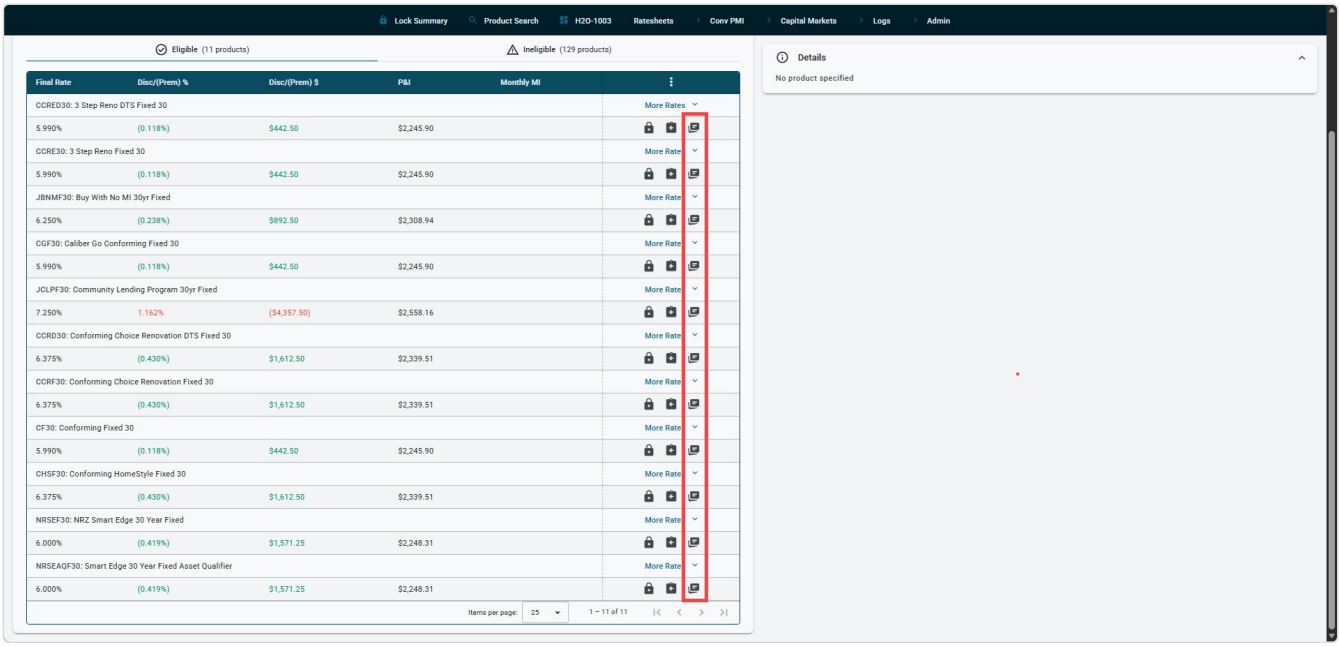
- Selecting **Comparisons** opens this landing page.
- All of your previously saved comparisons live here, in one place.



3 Add a product from the results page

Results page · right-side action

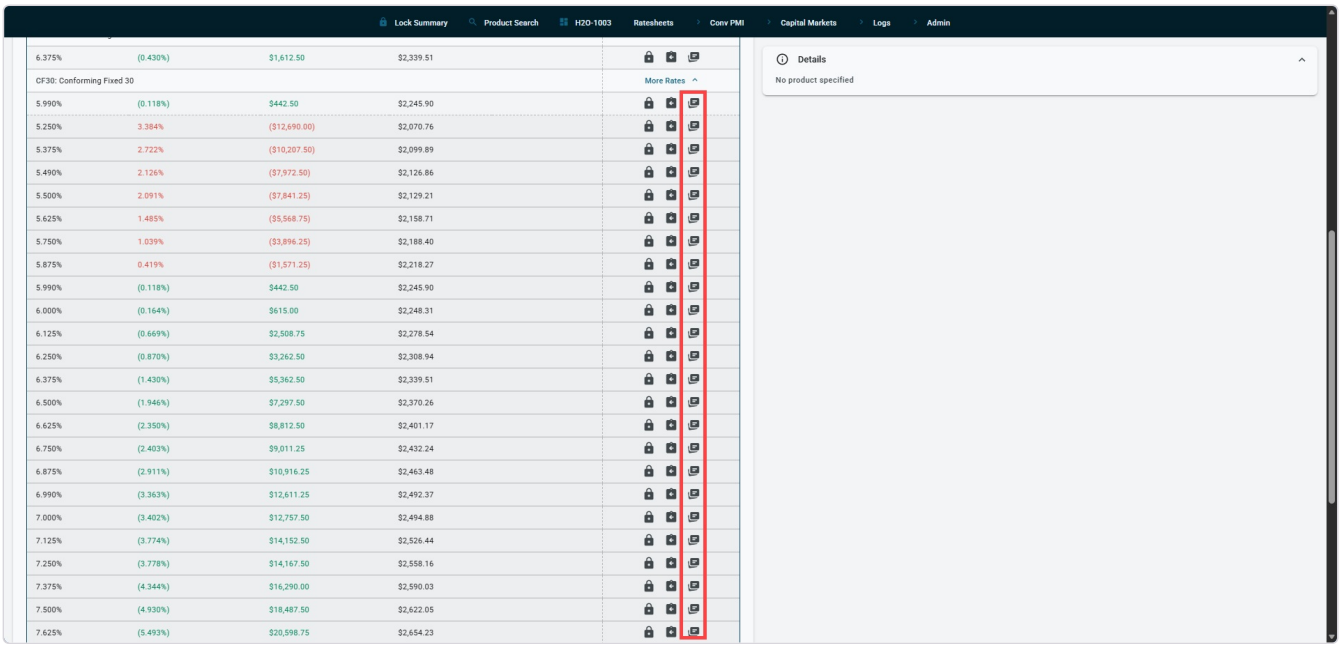
- A new **Add to Comparison** button appears on the right side of the results page.
- Use it to start building a side-by-side comparison directly from your results.
- The button shows alongside each eligible rate or product row.



4 Add from the More Rates section

Same action, expanded results context

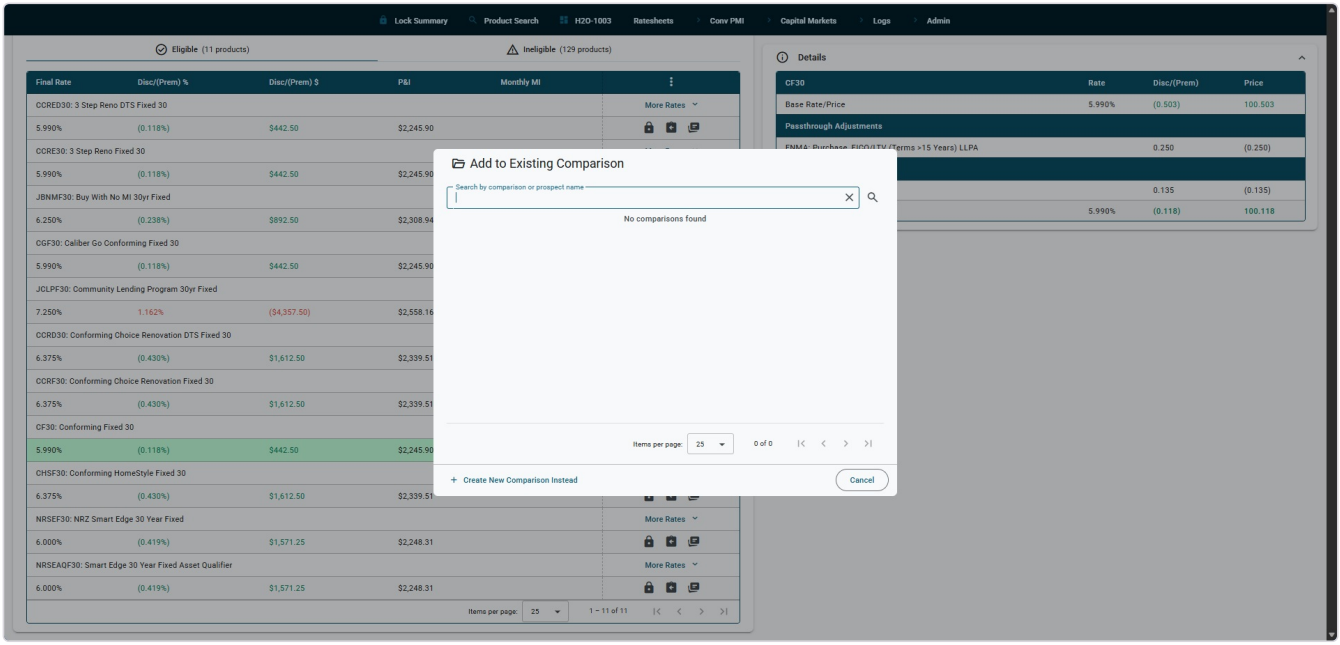
- The same **Add to Comparison** button also appears under the **More Rates** section.
- Consistent placement keeps the action easy to find wherever rates are displayed.



5 Choose or create a comparison

The Add to Comparison modal

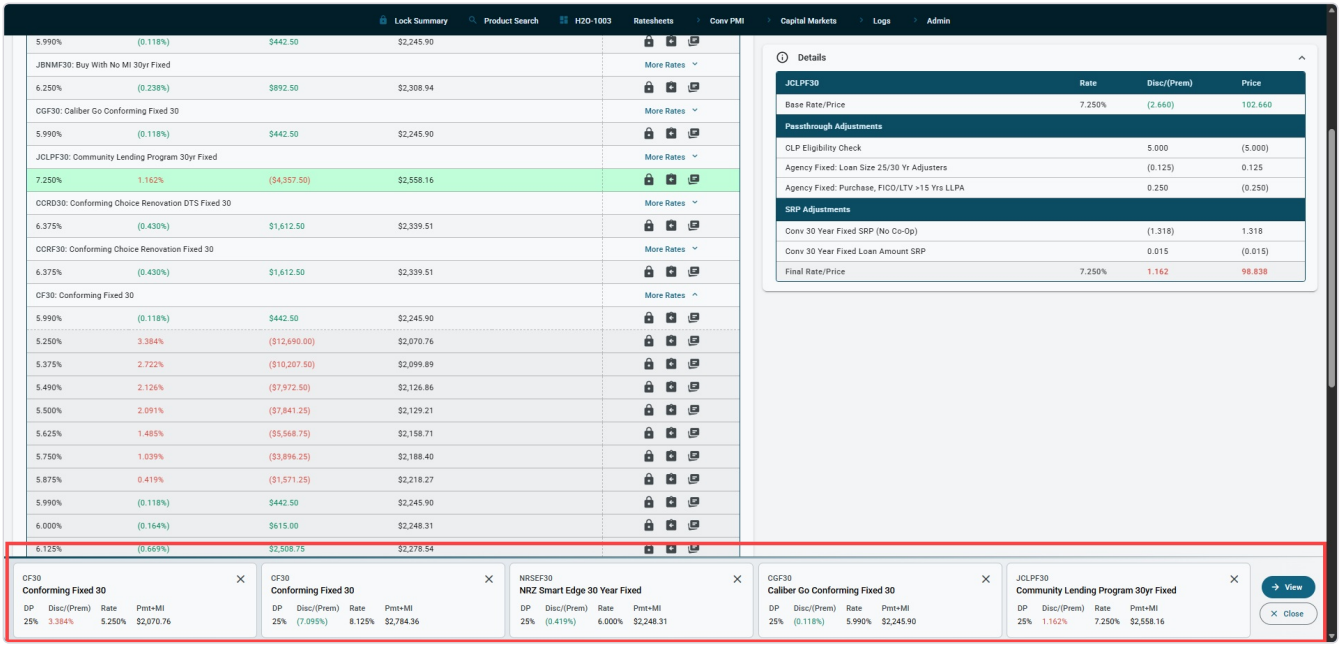
- Clicking **Add to Comparison** opens this modal.
- Select from existing comparison templates already created, or click **+ Create New Comparison Instead** to start fresh.



6 Create a new comparison

Snapshot of the selected product

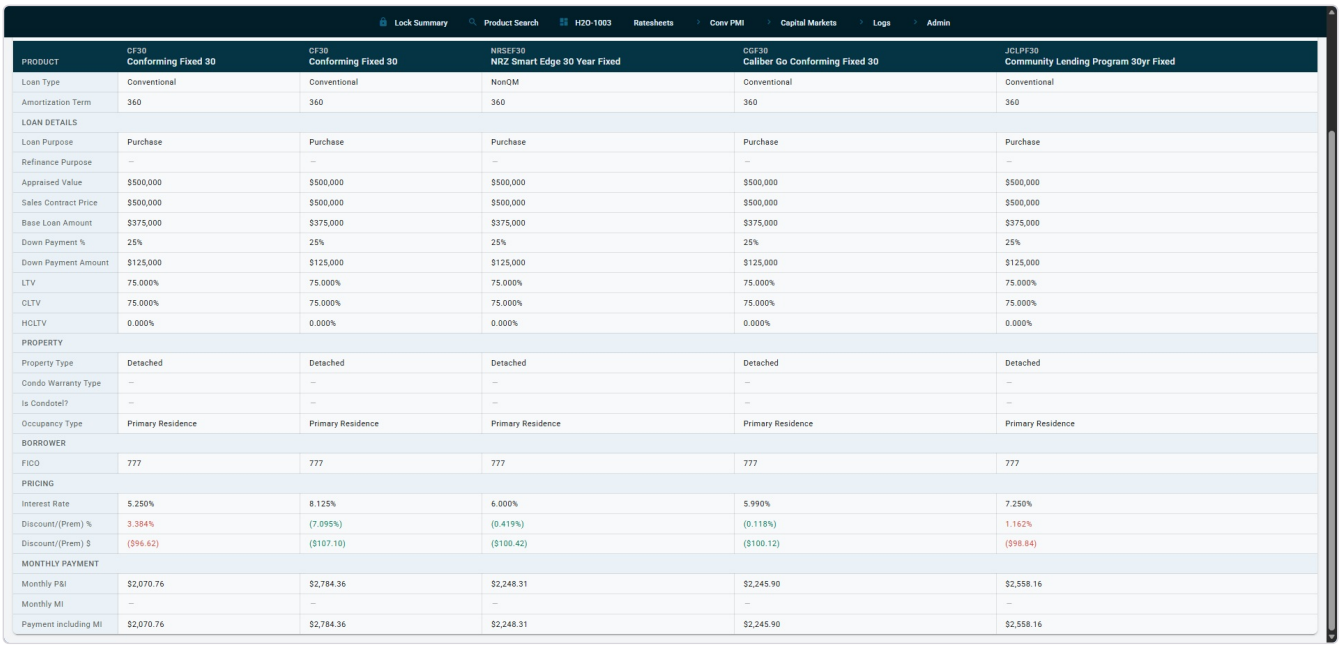
- After choosing **+ Create New Comparison**, a snapshot of the selected product information appears.
- Add up to **5 options** to compare — any rate or product returned in search is eligible.



7 View the full comparison

Click the blue View button

- The blue **View** button opens the full comparison page.
- All of your selected scenarios (up to 5) display side by side for a clear, at-a-glance evaluation.

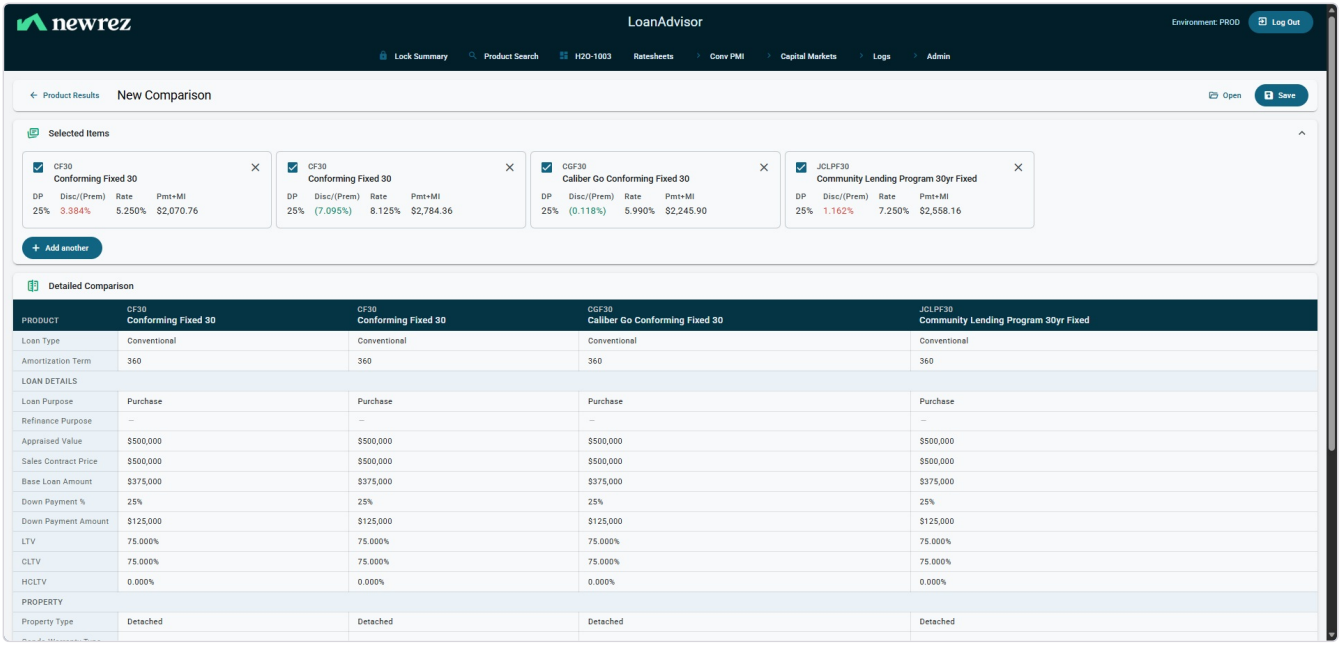


PRODUCT	CF30 Conforming Fixed 30	CF30 Conforming Fixed 30	NRSEF30 NRZ Smart Edge 30 Year Fixed	CGF30 Caliber Go Conforming Fixed 30	JCLPF30 Community Lending Program 30yr Fixed
Loan Type	Conventional	Conventional	NonQM	Conventional	Conventional
Amortization Term	360	360	360	360	360
LOAN DETAILS					
Loan Purpose	Purchase	Purchase	Purchase	Purchase	Purchase
Refinance Purpose	–	–	–	–	–
Appraised Value	$500,000	$500,000	$500,000	$500,000	$500,000
Sales Contract Price	$500,000	$500,000	$500,000	$500,000	$500,000
Base Loan Amount	$375,000	$375,000	$375,000	$375,000	$375,000
Down Payment %	25%	25%	25%	25%	25%
Down Payment Amount	$125,000	$125,000	$125,000	$125,000	$125,000
LTV	75.000%	75.000%	75.000%	75.000%	75.000%
CLTV	75.000%	75.000%	75.000%	75.000%	75.000%
HCLTV	0.000%	0.000%	0.000%	0.000%	0.000%
PROPERTY					
Property Type	Detached	Detached	Detached	Detached	Detached
Condo Warranty Type	–	–	–	–	–
Is Condotel?	–	–	–	–	–
Occupancy Type	Primary Residence	Primary Residence	Primary Residence	Primary Residence	Primary Residence
BORROWER					
FICO	777	777	777	777	777
PRICING					
Interest Rate	5.250%	8.125%	6.000%	5.990%	7.250%
Discount/(Prem) %	3.384%	(7.095%)	(0.419%)	(0.118%)	1.162%
Discount/(Prem) $	($96.62)	($107.10)	($100.42)	($100.12)	($98.84)
MONTHLY PAYMENT					
Monthly P&I	$2,070.76	$2,784.36	$2,248.31	$2,245.90	$2,558.16
Monthly MI	–	–	–	–	–
Payment including MI	$2,070.76	$2,784.36	$2,248.31	$2,245.90	$2,558.16

8 Edit scenarios in place

Remove and replace any scenario

- Click the **X** on any scenario card to remove it; the **+ Add Another** button then illuminates.
- Clicking **+ Add Another** returns you to Product Search to choose a new scenario and add it to the existing comparison.



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Amortization Term	360	360	360	360
LOAN DETAILS				
Loan Purpose	Purchase	Purchase	Purchase	Purchase
Refinance Purpose	–	–	–	–
Appraised Value	$500,000	$500,000	$500,000	$500,000
Sales Contract Price	$500,000	$500,000	$500,000	$500,000
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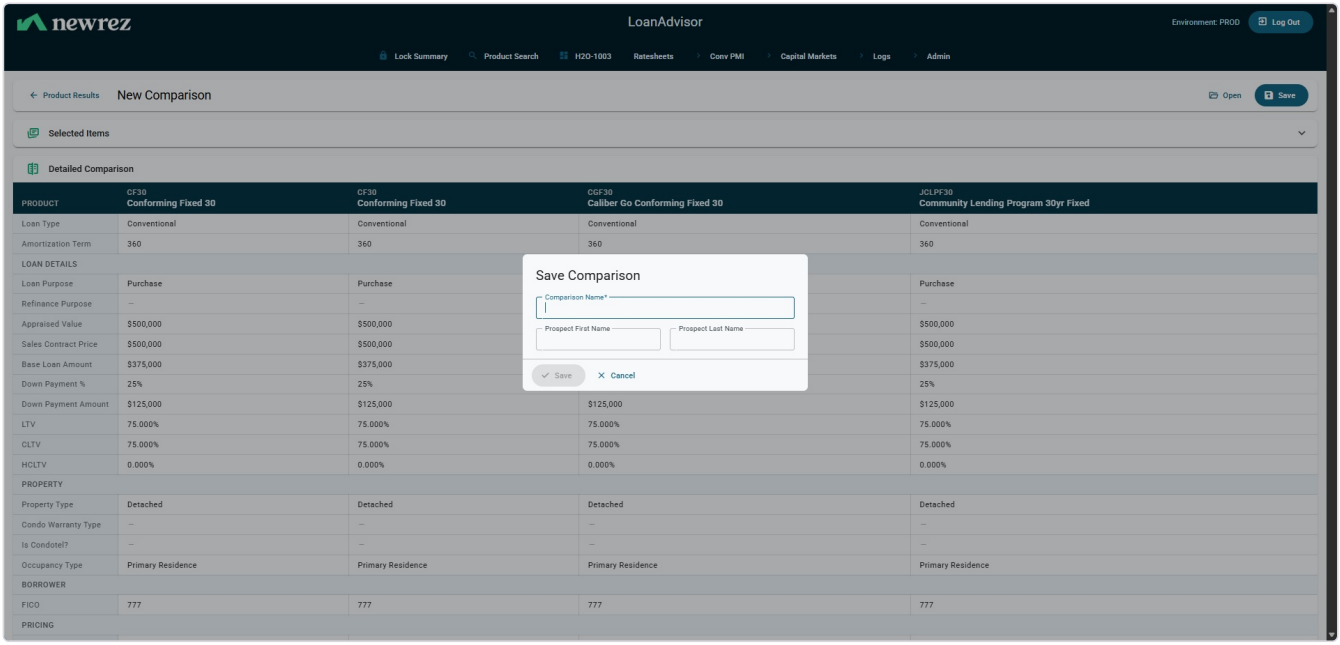
LTV	75.000%	75.000%	75.000%	75.000%
CLTV	75.000%	75.000%	75.000%	75.000%
HCLTV	0.000%	0.000%	0.000%	0.000%
PROPERTY				
Property Type	Detached	Detached	Detached	Detached

9 Save the comparison

Save button in the top-right corner

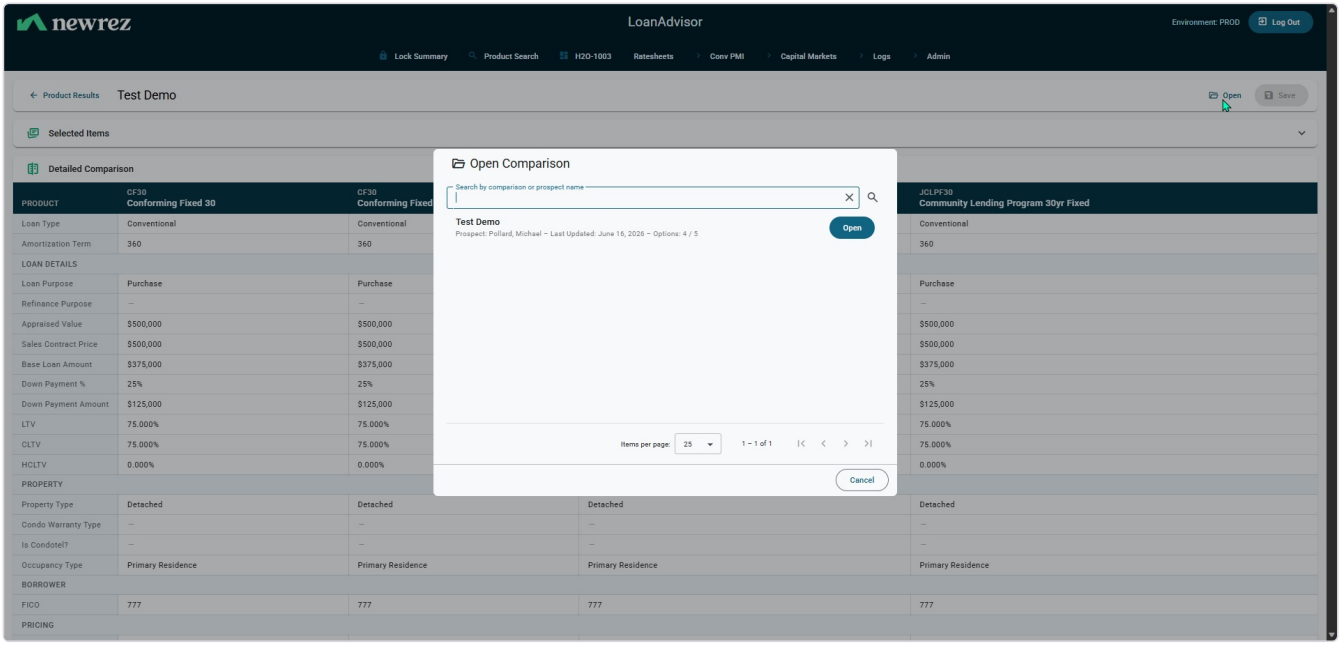
- Click **Save** in the top-right corner to preserve the current comparison.
- A modal appears so you can enter a name and details, saving it for future reuse.



10 Open a saved comparison

Quickly switch between saved comparisons

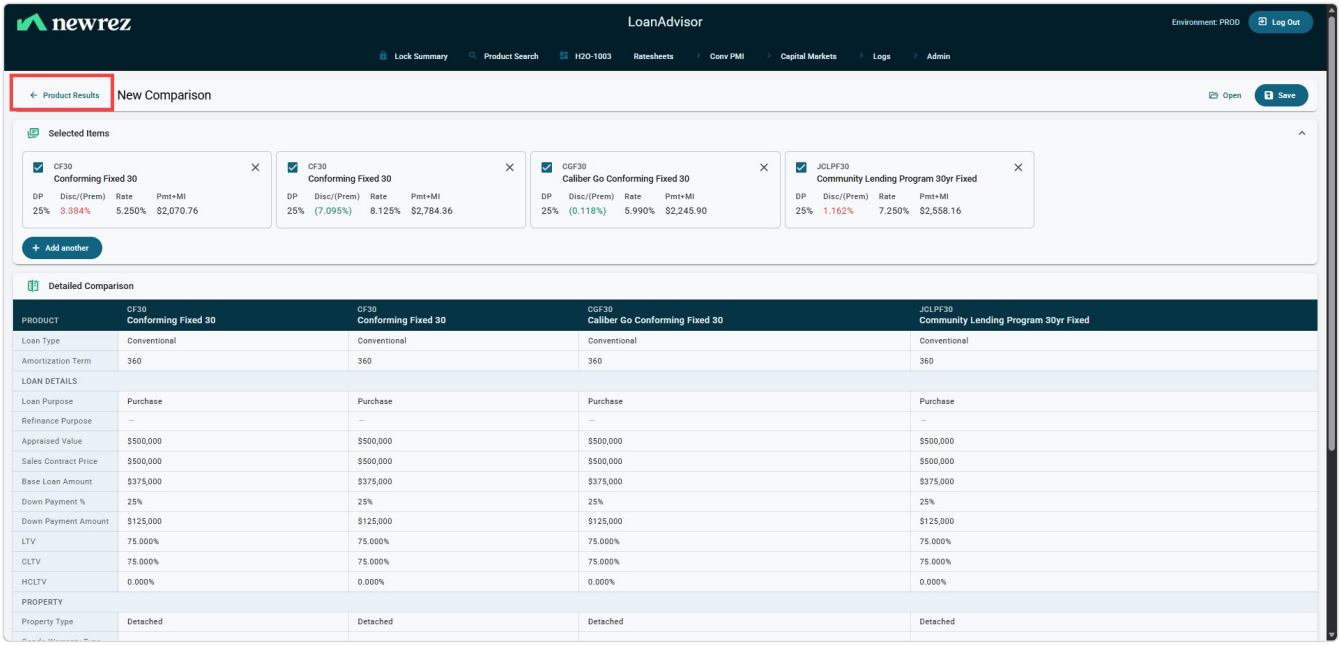
- Click the **Open** button to view other previously saved comparisons.
- The modal lists all saved comparisons available to reopen.



11 Return to results for lock & assignment

Click Product Results to perform lock & assignment

- Clicking the **Product Results** button returns you to the Product Search results page.
- From the results page you can perform lock and assignment on the selected product.



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