

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.

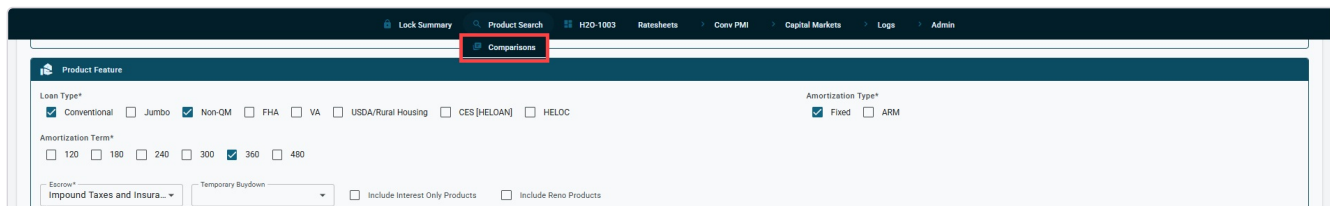
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1 Find the Comparison tab

Located under the Product Search header

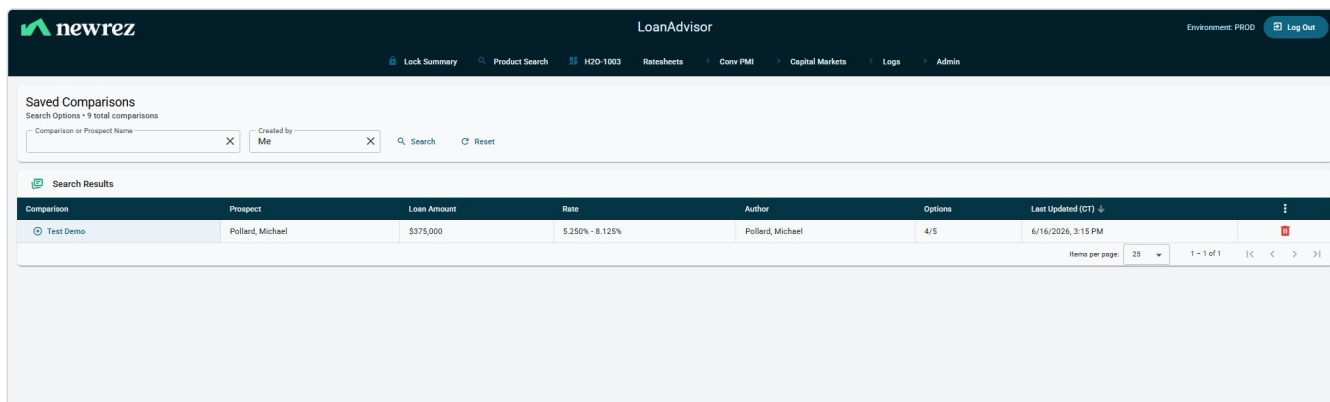
- ▶ A new **Comparison** tab now appears under the Product Search header.
- ▶ It gives you a direct entry point to the comparison workspace.
- ▶ From here you can view every saved comparison with its snapshot details — a single landing page for managing all of your comparison work.



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.

The screenshot shows a table with 11 eligible products. The table has columns for Final Rate, Disc/(Prem) %, Disc/(Prem) \$, P&I, Monthly MI, and a dropdown menu. A red box highlights the 'More Rates' and 'Add to Comparison' buttons on the right side of each row.

Final Rate	Disc/(Prem) %	Disc/(Prem) \$	P&I	Monthly MI	
CCRED30: 3 Step Reno DTS Fixed 30					More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
CCRED30: 3 Step Reno Fixed 30					More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
JBNMF30: Buy With No MI 30yr Fixed					More Rates
6.250%	(0.238%)	\$892.50	\$2,308.94		More Rates
CGF30: Caliber Go Conforming Fixed 30					More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
JCLPF30: Community Lending Program 30yr Fixed					More Rates
7.250%	1.162%	(\$4,357.50)	\$2,558.16		More Rates
CCRD30: Conforming Choice Renovation DTS Fixed 30					More Rates
6.375%	(0.430%)	\$1,612.50	\$2,339.51		More Rates
CCRF30: Conforming Choice Renovation Fixed 30					More Rates
6.375%	(0.430%)	\$1,612.50	\$2,339.51		More Rates
CF30: Conforming Fixed 30					More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
CHSF30: Conforming HomeStyle Fixed 30					More Rates
6.375%	(0.430%)	\$1,612.50	\$2,339.51		More Rates
NRSEF30: NRZ Smart Edge 30 Year Fixed					More Rates
6.000%	(0.419%)	\$1,571.25	\$2,248.31		More Rates
NRSEAF30: Smart Edge 30 Year Fixed Asset Qualifier					More Rates
6.000%	(0.419%)	\$1,571.25	\$2,248.31		More Rates

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.

The screenshot shows a table with 25 more rates. The table has columns for Final Rate, Disc/(Prem) %, Disc/(Prem) \$, P&I, Monthly MI, and a dropdown menu. A red box highlights the 'Add to Comparison' button on the right side of each row.

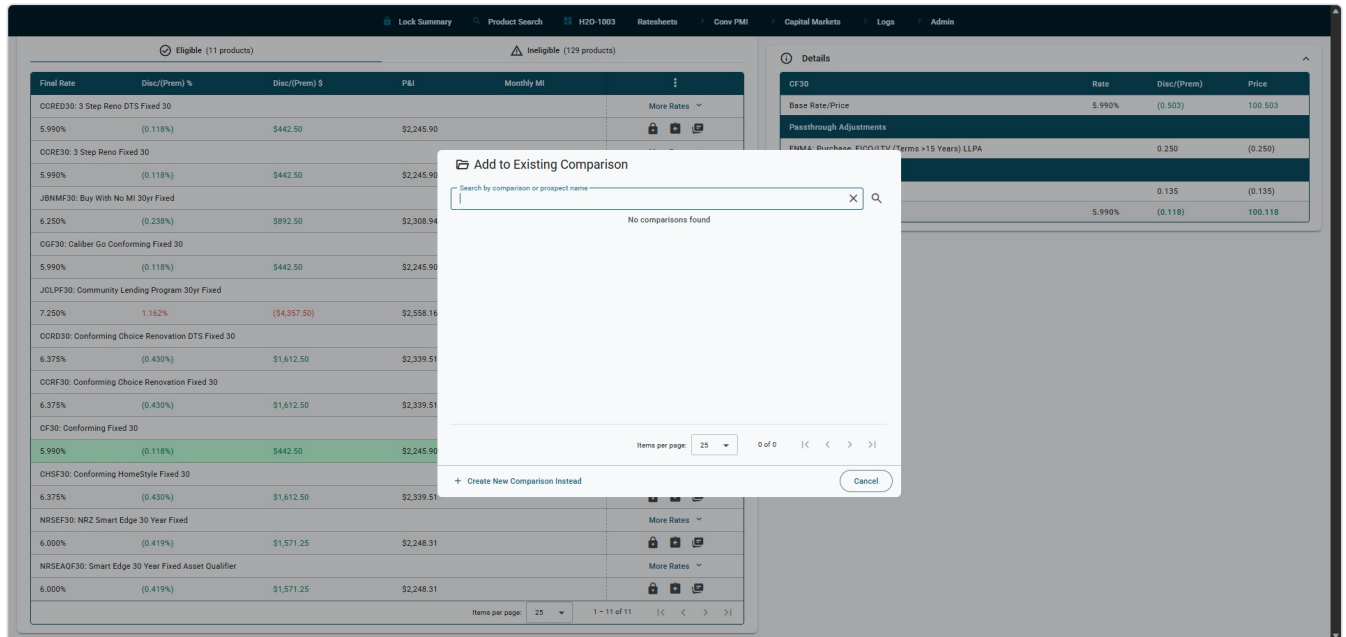
Final Rate	Disc/(Prem) %	Disc/(Prem) \$	P&I	Monthly MI	
6.375%	(0.430%)	\$1,612.50	\$2,339.51		More Rates
CF30: Conforming Fixed 30					More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
5.250%	3.384%	(\$12,690.00)	\$2,070.76		More Rates
5.375%	2.722%	(\$10,207.50)	\$2,099.89		More Rates
5.490%	2.126%	(\$7,972.50)	\$2,126.86		More Rates
5.500%	2.091%	(\$7,841.25)	\$2,129.21		More Rates
5.625%	1.485%	(\$5,568.75)	\$2,158.71		More Rates
5.750%	1.039%	(\$3,896.25)	\$2,188.40		More Rates
5.875%	0.419%	(\$1,571.25)	\$2,218.27		More Rates
5.990%	(0.118%)	\$442.50	\$2,245.90		More Rates
6.000%	(0.164%)	\$615.00	\$2,248.31		More Rates
6.125%	(0.669%)	\$2,508.75	\$2,278.54		More Rates
6.250%	(0.870%)	\$3,262.50	\$2,308.94		More Rates
6.375%	(1.430%)	\$5,362.50	\$2,339.51		More Rates
6.500%	(1.946%)	\$7,297.50	\$2,370.26		More Rates
6.625%	(2.350%)	\$8,812.50	\$2,401.17		More Rates
6.750%	(2.403%)	\$9,011.25	\$2,432.24		More Rates
6.875%	(2.911%)	\$10,916.25	\$2,463.48		More Rates
6.990%	(3.363%)	\$12,611.25	\$2,492.37		More Rates
7.000%	(3.402%)	\$12,757.50	\$2,494.88		More Rates
7.125%	(3.774%)	\$14,152.50	\$2,526.44		More Rates
7.250%	(3.778%)	\$14,167.50	\$2,558.16		More Rates
7.375%	(4.344%)	\$16,290.00	\$2,590.03		More Rates
7.500%	(4.930%)	\$18,487.50	\$2,622.05		More Rates
7.625%	(5.493%)	\$20,598.75	\$2,654.23		More Rates

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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.

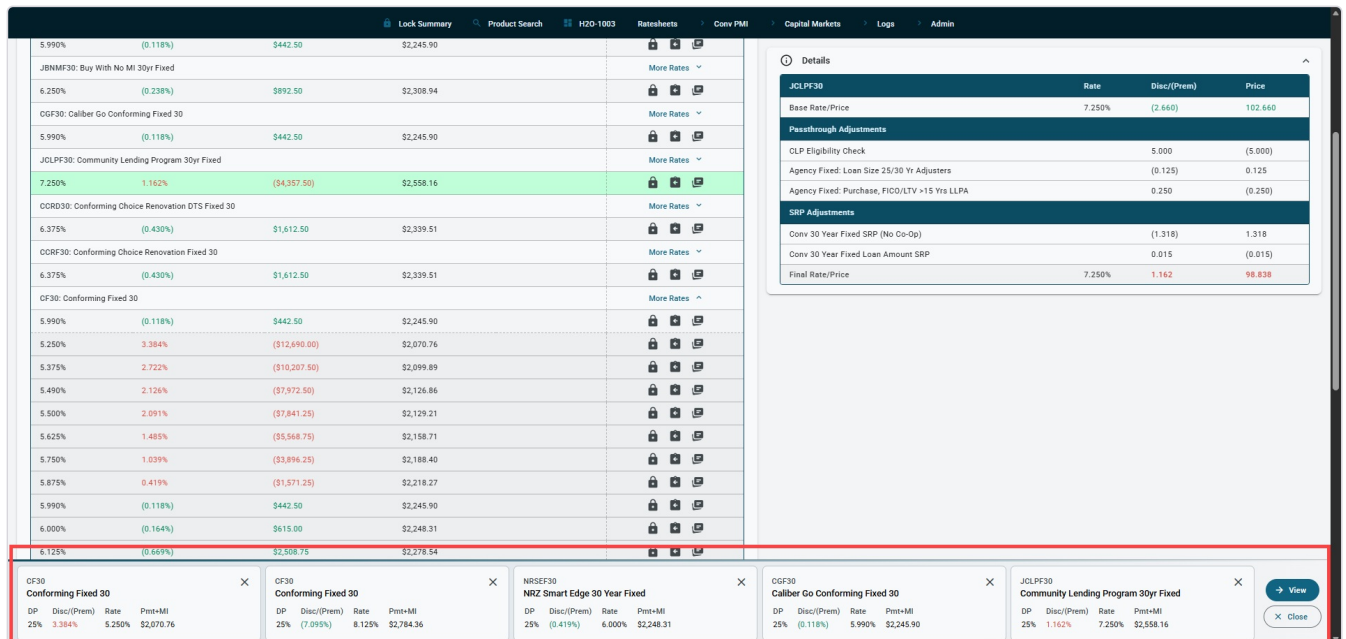


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Create a new comparison

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.



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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.

The screenshot shows the LoanAdvisor interface with a 'New Comparison' screen. A 'Save Comparison' modal is open in the center, prompting the user to enter a 'Comparison Name', 'Prospect First Name', and 'Prospect Last Name'. The background table displays loan details for four different products: CF30 Conforming Fixed 30, CF30 Conforming Fixed 30, CDF-30 Caliber Go Conforming Fixed 30, and JCLPF30 Community Lending Program 30yr Fixed. The table includes columns for Loan Type, Amortization Term, Loan Details (Loan Purpose, Refinance Purpose, Appraised Value, Sales Contract Price, Base Loan Amount, Down Payment %, Down Payment Amount, LTV, CLTV, HCLTV), PROPERTY (Property Type, Condo Warranty Type, Is Condo?, Occupancy Type), BORROWER (FICO), and PRICING.

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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.

The screenshot shows the LoanAdvisor interface with a 'Test Demo' screen. An 'Open Comparison' modal is open in the center, displaying a list of saved comparisons. The modal includes a search bar, a list of comparisons (e.g., 'Test Demo'), and an 'Open' button. The background table displays loan details for four different products: CF30 Conforming Fixed 30, CF30 Conforming Fixed 30, CDF-30 Caliber Go Conforming Fixed 30, and JCLPF30 Community Lending Program 30yr Fixed. The table includes columns for Loan Type, Amortization Term, Loan Details (Loan Purpose, Refinance Purpose, Appraised Value, Sales Contract Price, Base Loan Amount, Down Payment %, Down Payment Amount, LTV, CLTV, HCLTV), PROPERTY (Property Type, Condo Warranty Type, Is Condo?, Occupancy Type), BORROWER (FICO), and PRICING.

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.

Selected Items

Product	GF30 Conforming Fixed 30	GF30 Conforming Fixed 30	GF30 Caliber Go Conforming Fixed 30	JCLPF30 Community Lending Program 30yr Fixed
DP	25%	25%	25%	25%
Disc/(Prem)	0.384%	(7.095%)	(0.118%)	1.162%
Rate	5.250%	8.125%	5.990%	7.250%
Pmt+MI	\$2,070.76	\$2,784.36	\$2,245.90	\$2,558.16

Detailed Comparison

PRODUCT	GF30 Conforming Fixed 30	GF30 Conforming Fixed 30	GF30 Caliber Go Conforming Fixed 30	JCLPF30 Community Lending Program 30yr Fixed
Loan Type	Conventional	Conventional	Conventional	Conventional
Amortization Term	360	360	360	360
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
Base Loan Amount	\$375,000	\$375,000	\$375,000	\$375,000
Down Payment %	25%	25%	25%	25%
Down Payment Amount	\$125,000	\$125,000	\$125,000	\$125,000
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

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