

Toolbar Functionality



- Home >** Takes the user back to the home screen to start again with a new/different client or access the calculators
- View >** Allows the 'view' of the schemes to be changes to small, medium or large tiles or a grid view
- Sort by >** Controls the order that the schemes can be sorted by
- Details >** Shows the details, fees, rates, affordability, notes for the highlighted scheme
- Illustration >** Enables an illustration (KFI or ESIS) to be produced for the highlighted scheme
- Lender Notes >** Shows the lender's underwriting criteria
- Quick Calc >** Allows the demonstration of the increased payments due to a rate increase or a loan increase
- Graph >** Demonstration tool showing the impact overpaying/underpaying etc has on a flexible product or the impact an offset product can have on the term of the mortgage

- Start Again >** Allows the ability to start sourcing again with the same client
- New Search >** Provides the ability to retain the current search and create a new search for the same client, amending some criteria if required
- My Searches >** Only appears when multiple searches have been carried out for the same client in the same session
- Change Filters >** Allows filter settings to be amended for the current search only
- Exclude >** Offers the ability to exclude schemes, during the search, based on certain criteria
- Compare >** This functionality allows the comparison of multiple schemes across multiple searches to be displayed on one screen. The comparison can be printed out and is automatically saved to the client file
- Unmatched >** Shows the products that didn't match the client's criteria entered when searching
- Best Buys >** Displays the top 5 products, based on the client's search criteria
- Print >** Provides the ability to print documentation from the software