Quick How-To Guide

WORKING WITH BUYERS

BUYER ESTIMATE

“How much would my monthly payment be on this house?” or “How much do I need to bring to close on this house?”

1. Click BUYER tab
2. Choose loan type in top left (defaults to conventional)
3. Enter house price
4. Enter any other specific figures
5. Click COMPUTE
6. Click the share icon ( ) to send your estimate to your client

TIP - Ask buyers to text you the address of the homes they are interested in and send them net sheets instantly.

MONTHLY AFFORDABILITY

“I can afford $X per month. What home price should I be looking at?”

1. Click on the CALCULATORS tab
2. Click MONTHLY AFFORDABILITY
3. Enter desired monthly payment
4. Edit defaults if needed
5. Click COMPUTE to see home prices based on your down payment
6. Click the share icon ( ) to send to your client

RENT VS BUY

“Does it really make sense financially for me to buy instead of continue renting?”

1. Click on the CALCULATORS tab
2. Click RENT VS BUY
3. Enter current rent
4. Enter home price
5. Enter a down payment amount
6. Click ASSUMPTIONS to edit any of the defaulted assumptions
7. Click COMPUTE
8. Swipe left or right to access additional rent vs buy results screens
9. Click the share icon ( ) to send your results to your client

SMART COMPARE

**You want to show your client alternate loan options*

1. Click on the CALCULATORS tab
2. Click on SMART COMPARE
3. Enter the home price and adjust any defaults if needed
4. Click COMPUTE
5. Smart compare will automatically create comparable loans but you can press EDIT to edit the data points and compare the loan that you want to show your buyer
6. When you are ready to show your buyer, click the share icon ( ) to send the full report to your client

OTHER IMPORTANT THINGS TO KNOW

CUSTOMIZE YOUR EMAILS AND PRINTOUTS

Add your information to your account so that your reports and marketing material can be branded automatically!

1. Click on the menu icon ( ) at top left corner of your input screen
2. Tap “Profile” to edit your profile
3. Click on the photo or logo placeholder to add your photo or logo
4. Add Personal info, company info, and license numbers
5. Click save in the top right corner to make sure your profile changes are saved

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