Product Customization

The **product customization** feature allows you to change recommended product selections to better manage high-balance concentrations.

STEPS



Upload loans in .XLS or .CSV format.



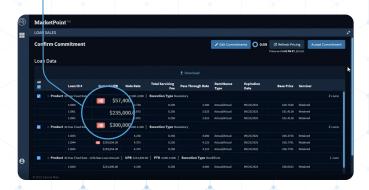
2

MarketPoint recommends committing products for each imported loan based on available pricing.



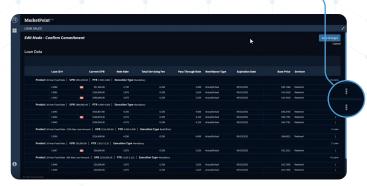
3

MarketPoint groups similar commitments and displays indicators for high-balance loans.



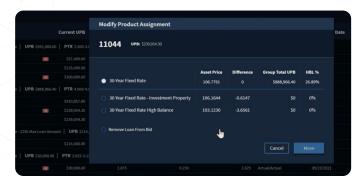


View and move loans (by clicking the three dots) into different commitments based on product eligibility.





Manage high-balance de minimis, via the Edit Commitments button, by viewing the high-balance percentage for each proposed commitment.





Commit all loans with one click after finalizing preferred product selections.

