

FINTACTIX · FINANCIAL CALCULATORS

# Design Customization Guide

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*Three-Tier Customization Framework — Customer Reference*

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Documentation Library: <https://www.fintactix.com/documentation>

## 1. Overview

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This guide walks through how the Fintactix calculator platform can be customized to match your institution's brand. It is intended for marketing teams, web designers, and digital channel managers evaluating how the calculators will integrate with your existing site.

Customization is implemented by the Fintactix team based on your specifications. You provide the brand inputs and target visual; we apply them to your calculator deployment.

### Three Tiers of Customization

Customization options fall into three tiers. Each tier builds on the one before it. Most institutions start at Tier 1 and only move into Tier 2 or Tier 3 if their brand standards require it.

#### **Tier 1 — Brand tokens**

Color palette, fonts, sizes — propagated globally across all 88 calculators in your library. Implemented by adjusting variables in our theme. Standard onboarding.

#### **Tier 2 — Element-level styling**

Restyle specific calculator elements independently — buttons, sliders, charts, tabs, tables. Standard onboarding.

#### **Tier 3 — Custom restyle**

Layout changes, structural modifications, dedicated theme work. Quoted as a separate engagement.

### How to Use This Guide

Sections 2, 3, and 4 walk through each tier in detail. Section 5 explains how to send us your brand specifications. If you only need brand-color and font alignment, Section 2 is all you need to read; the rest is reference for institutions with more specific design requirements.

## 2. Tier 1 — Brand Tokens

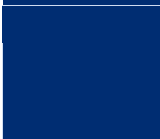


Tier 1 customization is implemented by adjusting a small set of variables in our theme. Changes propagate consistently across all 88 calculators in your library in a single round of work. This is the right starting point for almost every institution.

### What's included

- Primary brand color, accent color, neutrals
- Chart palette (up to 8 colors)
- Header font and body font (any web font source)
- Font size scale
- Global corner radius (sharp, moderate, or pill-shaped)

### Primary Brand Tokens

Three colors do most of the visual work. Pick a primary that contrasts well against white and an accent that stands out against the primary.

Sample	Token	Default	Use
	<b>Primary</b>	#002D72	Headers, slider thumb, table header backgrounds, fieldset titles, primary buttons, focus outlines
	<b>Accent</b>	#FF6929	Slider track fill, help-icon border, expand/collapse indicators, hover highlights
	<b>Secondary</b>	#424242	Body text, result values, table row text, secondary labels

### Chart Palette

Configured separately from the brand palette so you can pick colors that work for data visualization specifically. Most calculators only use the first two or three; the full sequence comes into play on stacked breakdowns and multi-scenario comparisons.





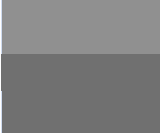
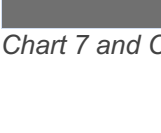
Sample	Token	Default	Use
	<b>Chart 1</b>	#002D72	Primary data series — main line, primary bar, principal in payment breakdowns
	<b>Chart 2</b>	#FF6929	Secondary series — comparison line, interest in payment breakdowns
	<b>Chart 3</b>	#CBCBCB	Tertiary series — taxes, third comparison option
	<b>Chart 4</b>	#424242	Fourth series — additional cost categories
	<b>Chart 5</b>	#909090	Fifth series — used on detailed breakdowns
	<b>Chart 6</b>	#707070	Sixth series — used on detailed breakdowns

Chart 7 and Chart 8 follow the same gray-scale ramp.

## Typography

Two font families — one for headings, one for body text. Defaults are Roboto Slab and Open Sans (Google Fonts). Both can be replaced with any web font.

- **Google Fonts.** Easiest. Provide the font names and weights; we add the import.
- **Adobe Fonts (Typekit).** Common for institutions with brand-licensed typefaces. Provide your kit ID; we embed it.
- **Self-hosted.** Send us the WOFF/WOFF2 files plus license confirmation. We host them alongside the calculator theme.
- **System-font stack.** No external font requests at all — uses fonts already on the visitor's device. Fastest option, clean neutral look.

## Corner Radius

The default theme uses moderately rounded corners. Two common variations:

- **Sharp corners** (0px radius) — common for traditional banks with formal, established brand language.
- **Pill-shaped** (larger radius) — common for credit unions and digital-first brands with friendlier, modern styling.

### **Tier 1 turnaround**

Standard Tier 1 customization is typically applied within 5–7 business days of receiving complete brand specs. We deliver a staging URL for review before pushing changes live to your production deployment.

## 3. Tier 2 — Element-Level Styling

Tier 1 changes everything everywhere. Tier 2 changes specific elements without touching the rest. Need pill-shaped buttons only on the email panel? A circular slider thumb instead of the default rounded square? Custom typography on result values while help text stays standard? Card-style fieldsets with a drop shadow? All Tier 2.

The calculator platform is built on a clean, semantic CSS architecture. Every meaningful element on every calculator has a stable, named CSS class or ID. That means we can target almost any element individually and apply nearly any CSS property to it: **colors, backgrounds, borders, border-radius, shadows, font weights, sizes, letter spacing, button shapes, hover states, focus styles, gradients, transitions** — anything CSS can express, applied to a specific calculator element.

### What's included

- Restyling any individual calculator element (see selector inventory below)
- Custom hover, focus, and active states
- Gradients, shadows, and visual effects on specific components
- Tab styling, button shape, slider appearance
- Chart title and legend treatment
- Result value typography (size, weight, letter spacing) independent from labels

### Element Selector Inventory

The tables below are a guided tour of the major calculator components and the CSS selectors that target them. This is not exhaustive — it's the structural backbone. Use these tables to phrase Tier 2 requests precisely ("restyle the slider thumb," "give the email panel its own button treatment," "change the active tab indicator").

#### Container and Panel Structure

Element	CSS Selector	What you can change
Calculator wrapper	<code>.calcWidget</code>	Outermost container. Background, max-width, overall padding, drop shadow framing the entire calculator.
Input panel	<code>.calcInputs</code>	The left/top panel where users enter values. Background color, border, border-radius, internal padding.
Field group header	<code>.calcFieldset summary</code>	The colored bar that titles each field group (e.g., "Loan Information"). Background, text color, font, padding, border-radius, hover effect.
Field group body	<code>.calcFieldset .details-wrapper</code>	The content area beneath each field group header. Background, border, internal spacing.

Element	CSS Selector	What you can change
Results panel	<code>.calcResults</code>	The result panel showing computed values. Background, border, border-radius, shadow.
Result panel title	<code>.calcResults</code> <code>.fieldset-legend</code>	The headline above results (e.g., "Monthly Payment"). Font family, size, weight, color, alignment.
Output containers	<code>.calcOutputs</code>	Wraps result detail breakdowns. Background, border, padding.
Help/disclosure panel	<code>.calcHelp</code>	The expandable help text section. Background, border, font size, internal styling.
Submit/email panel	<code>.calcSubmit,</code> <code>.calcEmail</code>	The Email Results panel. Background, accent bar color, button styling, form field appearance.

### Inputs and Sliders

Element	CSS Selector	What you can change
Field labels	<code>.calcInputs label</code>	Font family, size, weight, color, letter spacing, text transform (uppercase, etc.).
Text inputs	<code>.calcInputs input</code>	Border, border-radius, background, font, padding, focus outline color and style.
Currency/percent prefix	<code>.input-group-text</code>	The \$ and % adornments next to inputs. Background, color, border treatment.
Slider track (unfilled)	<code>.calc-slider track</code>	The unfilled portion of the slider track. Color, gradient, height, border-radius.
Slider track (filled)	<code>.calc-slider -- fill-pct</code>	The filled portion showing the current value. Color, gradient, transition speed.
Slider thumb	<code>.calc-slider thumb</code>	The draggable handle. Shape (square, round, pill), size, color, border, shadow, hover effect.
Help icon	<code>.webform-element-help</code>	The small ? icon next to fields. Size, shape, background, border, hover state.
Help tooltip	<code>.tippy-box</code>	The popover that appears on hover. Background, text color, shadow, arrow color.
Validation errors	<code>.error-message</code>	Background, border, text color, padding for inline error messages.

### Results, Tabs, Charts, and Tables

Element	CSS Selector	What you can change
Primary result value	<code>.webform-readonly input</code>	The big result number (e.g., the monthly payment). Font family, size, weight, color, letter spacing.

Element	CSS Selector	What you can change
Result field labels	<code>.calcResults label</code>	Labels above each result panel. Font, size, color, alignment.
Tabs container	<code>.calcTabs</code>	The Chart / Table / Amortization tab strip. Background, border, spacing.
Tab button (inactive)	<code>.tabs button,</code> <code>.resultsTab</code>	Background, color, font, border-radius, padding, hover state.
Tab button (active)	<code>.tabs</code> <code>button.active,</code> <code>.resultsTab.open</code>	Active tab background, color, weight, indicator bar — fully independent from inactive state.
Chart container	<code>.calcGraph,</code> <code>.chartArea</code>	Background, border, padding around the Highcharts canvas.
Chart title	<code>.highcharts-title</code>	Font family, size, weight, color of chart titles.
Chart legend items	<code>.highcharts-legend-</code> <code>item</code>	Legend text color, font, size.
Data table area	<code>.tableArea</code>	Background, border, internal spacing for data tables.
Amortization table	<code>.amortizationArea</code>	Background, border for the month-by-month amortization schedule.
Table header row	<code>.columnHead</code>	Background color, text color, font, padding, border for table headers.
Table row striping	<code>.tableArea tr:nth-</code> <code>child</code>	Alternating row backgrounds — odd and even rows independently configurable.
Display All button	<code>.display-all-btn</code>	The button revealing the full amortization. Background, color, border-radius, hover.

## Result Layout Positions

Calculators arrange their result values in 1-to-6 column layouts depending on what's being shown. Each position has its own class, so you can style result positions individually — for example, a different background on the primary result, or different emphasis on the secondary breakdowns.

Element	CSS Selector	What you can change
1 result panel	<code>.resultsPanel1</code>	Single full-width result. Often the headline number — e.g., "Monthly Payment."
2-result layout	<code>.resultsPanel2</code>	Side-by-side pair. E.g., "Total Interest"   "Total Cost."
3-result layout	<code>.resultsPanel3</code>	Three-up. Common for purchase/down/finance breakdowns.
4-result layout	<code>.resultsPanel4</code>	Four-up. Used on more detailed result panels.

Element	CSS Selector	What you can change
<b>5/6-result layout</b>	<code>.resultsPanel5,</code> <code>.resultsPanel6</code>	Five and six column layouts for ratio analyzers and dense breakdowns.

## CTA Area

Each calculator includes a configurable call-to-action region below the results. The CTA accepts arbitrary HTML, so it's not just "styled" — it's authored. You can include headlines, body copy, multiple buttons, supporting imagery, logos, or any other markup. Different calculator series can carry different CTAs (auto calculators driving to auto-loan applications, mortgage to mortgage applications).

### CTA tracking

CTA clicks are automatically tracked as GA4 events with the calculator ID, category, and CTA label. You'll see exactly which calculators are converting borrowers and which CTAs are working — without any additional analytics setup on your side.

## Tier 2 in Practice — Five Examples

A few examples to make Tier 2 concrete. None of these require a custom theme — they're typical Tier 2 requests.

- 1. Pill-shaped buttons in your accent color, only on the email panel.** Global buttons stay rounded-rectangle in your primary navy. The email panel's submit button gets a fully rounded pill shape in the brand orange with a subtle hover transition.
- 2. Large, condensed numerals for result values.** Headline result values render in your display font at a larger size with tighter letter spacing for impact, while field labels and help text continue to use the body font.
- 3. Subtle gradient on slider tracks.** Slider track filled portion shows a left-to-right gradient from your primary to your accent. Slider thumb becomes a circle with a 1px border and a soft shadow.
- 4. Branded chart styling.** Chart titles use your display font in your primary brand color. Legend items render in your secondary color at a specific size. Pie chart connectors match your accent.
- 5. Card-style fieldsets with shadow.** Replace the default field group header bar with a softer card treatment: white background, 1px border in light gray, subtle drop shadow, header text in your primary navy with a colored left rule.

### Mix and match

Tier 2 changes are independent. You can apply any combination — pill buttons on the email panel, gradient sliders, custom chart styling, card-style fieldsets — without any one change affecting the others. Each element is its own surface.

## 4. Tier 3 — Custom Restyle

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Tier 3 covers changes that go beyond styling existing elements — modifications to the underlying layout, structure, or behavior of the calculator. These require dedicated engineering work, separate scoping, and a one-time engagement quote.

### What's included

- Layout restructuring — moving, reordering, or removing panels
- Custom responsive breakpoints or layout density
- Dedicated theme variant for institutions with strong design systems
- Custom field labels or copy variations
- Chart type substitutions (e.g., stacked bar to pie)
- Calculator-specific UI changes (different layout for one or two specific calculators)

### What's Standard in Tier 1 and Tier 2 (and why)

To keep Tier 1 and Tier 2 maintainable across hundreds of institutions and to preserve our WCAG 2.2 AA accessibility certification, certain elements are deliberately fixed in the standard package. If your brand standards require any of these to change, that's the conversation that becomes Tier 3.

#### Layout Structure

The arrangement of the input panel, result panel, tabs, chart, and CTA area is consistent across all institutions in standard onboarding. We don't move panels, swap left/right ordering, or restructure the page flow as part of Tier 1 or Tier 2 work. Visual styling on each region is fully open at Tier 2; the structural arrangement itself is a Tier 3 conversation.

#### Spacing Scale and Breakpoints

The spacing system (the rhythm of margins and paddings across the platform) and the responsive breakpoints (when the layout reflows for mobile, tablet, and desktop) are part of the platform baseline. Individual element padding can be tuned at Tier 2; the underlying spacing scale and breakpoint logic are Tier 3.

#### Interaction Patterns

The native range slider behavior, text-input pairing, validation patterns, and focus/keyboard handling are part of our WCAG 2.2 AA compliance baseline. The visual treatment of these elements is fully customizable at Tier 2; the underlying interaction model is a Tier 3 engagement and would need to maintain accessibility certification.

#### Calculation Logic and Field Labels

The financial math is fixed across the library — the calculations themselves are not customizable at any tier. The wording of input/output fields ("Loan amount," "Monthly payment," "Annual percentage rate") is standard across the library by default; custom field labels are a Tier 3 engagement.

#### Chart Types

Each calculator uses a chart type chosen for the data it shows. Chart styling — colors, fonts, gridlines, legend position, tooltip appearance — is fully open at Tier 2. Chart type substitution itself (e.g., switching a stacked bar to a pie) is a Tier 3 conversation.

### **Tier 3 scoping**

Tier 3 engagements are scoped and quoted before work begins. Reach out to your Fintactix account contact early in your planning process — Tier 3 changes need to be locked in before onboarding kicks off so the work can be planned around your launch timeline.

## 5. Sending Us Your Brand Specs

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The most efficient way to give us what we need:

1. Your existing brand guide PDF — we can extract colors, fonts, and tone from a brand guide directly. This is the most reliable source for Tier 1 work.
2. A live page from your site that represents the look you want the calculators to match. We'll inspect it for color, font, spacing, and shape cues.
3. A list of specific Tier 2 requests — "slider thumb circle, not square," "primary buttons in pill shape with shadow," "chart titles in our display font." The CSS selector inventory in Section 3 is intended to make these requests easy to phrase.
4. A filled-out specification form — we'll send you a short questionnaire covering primary color, accent color, header font, body font, and any specific elements you want to call out.

### Minimum Requirements (Tier 1)

- Primary brand color (hex value)
- Accent color (hex value)
- Header font name and source (Google Fonts, Adobe Fonts, self-hosted, or system stack)
- Body font name and source
- Optional: chart palette (otherwise we generate one from your primary and accent)
- Optional: CTA destinations per calculator category

### Additional Inputs (Tier 2)

- Specific element-level requests using the selector inventory as reference
- Examples or reference visuals for the treatment you want — screenshots from your site, design comps, or links to other examples that match the look
- Hover/focus state expectations for any interactive elements being restyled

#### Turnaround

Tier 1 customization is typically applied within 5–7 business days of receiving complete brand specs.

Tier 2 element-level styling is scoped per request — most individual requests fall in the same window; complex multi-element requests are quoted before work begins.

Tier 3 engagements are scoped and quoted separately. We deliver a staging URL for review at all tiers before pushing changes live to your production deployment.

### Questions

If you'd like to walk through customization options for your specific brand, see how a particular palette or element treatment would look applied to one of our calculators before committing, or scope a Tier 3 engagement, your Fintactix account contact can set up a working session.

Email [info@fintactix.com](mailto:info@fintactix.com) to start the conversation.