

FINTACTIX · FINANCIAL CALCULATORS

Customer Implementation Guide

Smart Embed System — Complete Technical Reference

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Proprietary and Confidential — Fintactix, LLC

Support: info@fintactix.com

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

1. The Fintactix Smart Embed System

Fintactix calculators are delivered through the Smart Embed system — a lightweight JavaScript library hosted on the Fintactix CDN that handles iframe creation, token authentication, auto-resizing, and deferred loading from a simple HTML placeholder.

The Smart Embed approach differs from a raw iframe embed: you do not embed the iframe directly. Instead, you place a div placeholder with data attributes and include the Fintactix embed script. The script finds the placeholder, verifies the embed token, creates the authenticated iframe, and wires up auto-resize — automatically.

The Two Components

Every Fintactix Smart Embed consists of exactly two elements: a placeholder div and a script tag.

The embed code generator assembles both components for you

The Embed Code button on your Calculator Home Page generates a complete, ready-to-paste block containing both the placeholder div and the script tag — pre-filled with your institution's correct calculator URL and embed token. You do not need to manually construct or edit the embed code.

1. The Placeholder Div

```
<div
  data-fintactix
  data-src="https://calculators.fintactix.net/[institution]/mortgage/m01"
  data-token="[your-embed-token]"
  data-title="Mortgage Payment Calculator"
  data-min-height="500">
</div>
```

2. The Script Tag

```
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
```

The script tag can be placed once per page — in the footer, a shared template, or immediately after the placeholder div. It does not need to be repeated for each calculator; a single instance initializes all placeholders it finds.

Data Attributes Reference

Attribute	Description
<code>data-fintactix</code>	Required. Presence attribute — identifies this div as a Fintactix placeholder. No value needed.
<code>data-src</code>	Required. The full URL of the calculator to load from <code>calculators.fintactix.net</code> , including your institution's subfolder. Provided during onboarding.
<code>data-token</code>	Required. Your institution-specific embed token. Authenticates the embed. Available on your Calculator Home Page. Do not commit to public repositories.

Attribute	Description
<code>data-title</code>	Required for WCAG 2.2 compliance. Sets the accessible name of the iframe for screen reader users. Use a descriptive name matching the calculator (e.g., "Mortgage Payment Calculator").
<code>data-min-height</code>	Optional. Minimum iframe height in pixels. If omitted, defaults to 300. The embed code generator pre-fills 500 as a safe baseline for most calculators. Set higher for calculators with charts or extensive result sections.
<code>data-fintactix-defer</code>	Optional. Prevents auto-initialization on page load. Required for accordion and tab panel implementations. See Section 3.

2. Getting and Using Your Embed Code

The Embed Code Generator

Your Calculator Home Page — the page listing all calculators licensed to your institution — has an Embed Code button next to every calculator. This is your primary tool for getting embed code.

Step-by-step

1. Navigate to your Calculator Home Page. If you do not have this URL, contact info@fintactix.com.
2. Find the calculator you want to embed in the table.
3. Click the Embed button in the rightmost column of that row.
4. In the modal that opens, select your institution from the Customer dropdown. Your embed token is applied automatically.
5. Click Copy on the Fintactix Embed tab. The complete embed code — placeholder div and script tag — is now on your clipboard.
6. Paste the copied code into your CMS page. See Section 6 for CMS-specific placement notes.

JSON-LD Schema tab

The embed code modal also includes a JSON-LD Schema tab. This shows the WebApplication structured data that `fintactix-embed.js` automatically injects into your page's `<head>` for each embedded calculator. No action is required — it is included automatically. The Schema tab is provided for reference so you can verify the structured data before deployment.

What the Generated Code Looks Like

The code copied from the modal is a single, ready-to-paste block:

```
<div data-fintactix data-src="https://calculators.fintactix.net/firstnational/mortgage/m01"
  data-token="535a617d..." data-title="Mortgage Payment Calculator"
  data-min-height="500"></div>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
```

The div is always output on a single line for CMS compatibility. The script tag follows on the next line. Both are included — you do not need to add the script tag separately.

Multiple Calculators on One Page

Place multiple placeholder divs — each with its own `data-src` pointing to a different calculator. The script initializes all of them from a single script tag.

```
<!-- Mortgage Calculator -->
<div data-fintactix
  data-src="https://calculators.fintactix.net/firstnational/mortgage/m01"
  data-token="your-token" data-title="Mortgage Payment Calculator" data-min-height="500">
</div>

<!-- Refinance Calculator -->
<div data-fintactix
  data-src="https://calculators.fintactix.net/firstnational/mortgage/m03"
  data-token="your-token" data-title="Refinance Calculator" data-min-height="500">
</div>

<!-- Single script tag handles both -->
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
```


3. Accordion and Tab Panel Integration

Accordion and tab implementations require a different approach from standard single calculator embeds. If you use the standard embed code inside a hidden accordion panel, all calculators load on page load — defeating the purpose of the accordion pattern and causing performance problems.

Critical: Use `data-fintactix-defer` for accordion and tab panels

The embed code from your Calculator Home Page does NOT include `data-fintactix-defer` and loads immediately on page load. Add the `defer` attribute to any placeholder that lives inside an accordion panel or tab. Without it, all calculators initialize on page load regardless of whether the panel is open.

Required Scripts

Accordion implementations require both scripts — not just `fintactix-embed.js`:

```
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-accordion.js" defer></script>
```

`fintactix-accordion.js` listens for panel open events and initializes the calculator at that moment, rather than on page load.

jQuery UI Accordion Example

```
<div id="calc-accordion">
  <h3>Mortgage Payment Calculator</h3>
  <div>
    <div data-fintactix data-fintactix-defer
      data-src="https://calculators.fintactix.net/firstnational/mortgage/m01"
      data-token="your-token"
      data-title="Mortgage Payment Calculator"
      data-min-height="500">
    </div>
  </div>
  <h3>Home Affordability Calculator</h3>
  <div>
    <div data-fintactix data-fintactix-defer
      data-src="https://calculators.fintactix.net/firstnational/mortgage/m02"
      data-token="your-token"
      data-title="Home Affordability Calculator"
      data-min-height="500">
    </div>
  </div>
</div>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-accordion.js" defer></script>
<script>
  jQuery(function($) {
    $('#calc-accordion').accordion({ heightStyle: 'content', collapsible: true });
  });
</script>
```

Bootstrap Tabs Example

```
<!-- Tab nav -->
<ul class="nav nav-tabs" id="calcTabs">
  <li class="active"><a href="#mortgage-tab" data-toggle="tab">Mortgage</a></li>
  <li><a href="#auto-tab" data-toggle="tab">Auto Loan</a></li>
</ul>
<!-- Tab content -->
<div class="tab-content">
```

```
<div class="tab-pane active" id="mortgage-tab">
  <div data-fintactix data-fintactix-defer
    data-src="https://calculators.fintactix.net/firstnational/mortgage/m01"
    data-token="your-token" data-title="Mortgage Calculator" data-min-height="500">
  </div>
</div>
<div class="tab-pane" id="auto-tab">
  <div data-fintactix data-fintactix-defer
    data-src="https://calculators.fintactix.net/firstnational/auto/a01"
    data-token="your-token" data-title="Auto Loan Calculator" data-min-height="500">
  </div>
</div>
</div>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-accordion.js" defer></script>
```

Drupal accordion (fintactix-accordion.js module)

If your institution's calculator site is hosted on a Drupal multisite, the fintactix-accordion.js script handles Drupal's accordion behavior automatically. No additional jQuery UI initialization is needed.

4. Auto-Resize Behavior

The Smart Embed system automatically resizes the iframe height as the calculator’s content changes — for example, when a user reveals results, expands help text, or triggers a chart. No configuration is required; this behavior is built into fintactix-embed.js.

How It Works

- The calculator page (inside the iframe) posts a postMessage event when its content height changes.
- fintactix-embed.js listens for these events on the parent page and updates the iframe height accordingly.
- The iframe never shows a vertical scrollbar. Content is always fully visible.

The data-min-height Attribute

Set data-min-height to prevent the iframe from collapsing to a very small height before the calculator loads. A value of 400–600px is appropriate for most calculators. Calculators with charts or extensive result sections may benefit from 600–700px.

Attribute	Description
data-min-height="400"	Standard calculators — basic payment, rate, or savings tools
data-min-height="500"	Calculators with moderate result sections (most mortgage tools)
data-min-height="600"	Calculators with Highcharts result charts or comparison tables
data-min-height="700"	Full financial planning calculators with multiple output sections

CSP Considerations

If your institution’s website uses a Content Security Policy, the following directives must permit Fintactix resources:

```
frame-src https://calculators.fintactix.net;
script-src https://cdn.fintactix.com;
```

If your CSP is currently in report-only mode, you will see console warnings but the calculator will still load. When you switch to enforced mode, these directives must be present.

5. URL Parameter Suppression

Each calculator URL accepts optional query parameters that suppress specific UI elements. These are useful when embedding calculators in contexts where certain interface elements are redundant or visually inconsistent with the surrounding page.

Available Parameters

Attribute	Description
<code>?hide_title=1</code>	Hides the calculator’s internal title/heading. Use when the surrounding page already has a clear heading identifying the calculator.
<code>?hide_help=1</code>	Hides the help icon and tooltip text on individual fields. Use for streamlined, minimal presentations.
<code>?source=channel</code>	Tracks the embed source for analytics attribution. Replace channel with a descriptive label (e.g., homepage, lp-mortgage, mobile). Appears in GA4 event data.

Using ?source= to measure performance by placement

The same calculator can appear in multiple locations on your site — a product page, a homepage widget, a campaign landing page — and each placement may drive meaningfully different engagement. The `?source=` parameter lets you distinguish them in your analytics.

For example, if your Mortgage Payment Calculator is embedded on both your mortgage product page and your homepage, configure each embed with a unique source value:

```
data-src="...mortgage/m01?source=mortgage-product-page"
data-src="...mortgage/m01?source=homepage"
```

Both instances run identically for the member. In GA4, every `fintactix_*` event from each placement carries its source value, so you can compare load counts, first interactions, and CTA clicks across placements in a single report. Over time, this tells you which pages are generating genuine calculator engagement — and which are just receiving traffic.

Usage

Append parameters to the `data-src` URL. Parameters can be combined:

```
<!-- Hide title only -->
<div data-fintactix
  data-src="https://calculators.fintactix.net/firstnational/mortgage/m01?hide_title=1"
  data-token="your-token" data-title="Mortgage Payment Calculator">
</div>

<!-- Hide title and help text, with source tracking -->
<div data-fintactix
  data-src="...mortgage/m01?hide_title=1&hide_help=1&source=homepage"
  data-token="your-token" data-title="Mortgage Payment Calculator">
</div>
```

The data-title attribute is unaffected

The `data-title` attribute on the placeholder div sets the accessible iframe name for screen readers and is always required for WCAG 2.2 compliance. It is separate from the visual title inside the calculator and is not affected by `?hide_title=1`.

6. CMS Integration Notes

The placeholder div and script tag can be added to virtually any CMS. The most common implementation issues are caused by text filters that strip HTML attributes or tags from body fields. This section covers the most common platforms.

Single-Line Embed Requirement

Some CMS body field text filters strip attributes from multi-line HTML. If your calculator fails to load after pasting the embed code, try collapsing it to a single line:

```
<div data-fintactix data-src="https://calculators.fintactix.net/firstnational/mortgage/m01" data-token="your-token" data-title="Mortgage Payment Calculator" data-min-height="500"></div>
```

Drupal

In Drupal, the Full HTML text format must be selected for any content field that will host a calculator embed. The div and all data attributes will be preserved. If your site uses a custom text format with attribute filtering, add `data-fintactix`, `data-src`, `data-token`, `data-title`, `data-min-height`, and `data-fintactix-defer` to the allowed attributes list.

The script tag should be added to the page template (for example, via `hook_page_attachments()` in a custom module, or in the theme's `html.tpl.php` or a block) rather than pasted into a body field, since most restricted text formats strip script tags.

WordPress

Use the Custom HTML block in the block editor (Gutenberg). Do not use the Classic paragraph block — it strips custom HTML attributes. The script tag can be added via your theme's `functions.php` using `wp_enqueue_script()`, or via a plugin like Header and Footer Scripts.

```
// functions.php - enqueue the Fintactix embed script
function fintactix_embed_script() {
    wp_enqueue_script(
        'fintactix-embed',
        'https://cdn.fintactix.com/embed/v1/fintactix-embed.js',
        array(), null, true // true = load in footer
    );
}
add_action('wp_enqueue_scripts', 'fintactix_embed_script');
```

Squarespace

Use a Code Block (Insert → Code) and paste both the placeholder div and the script tag. Squarespace preserves custom HTML attributes in Code Blocks.

Webflow

Add an Embed element to the page canvas and paste both the placeholder div and script tag. Webflow preserves all HTML attributes in Embed elements.

Sitecore / Kentico / Other Enterprise CMS

Add the placeholder div through your CMS's HTML component or raw HTML field. Add the script tag to the shared page layout template (header or footer) to ensure it loads on every page where calculators appear. Confirm that your CMS's output encoding is not converting double quotes in data attribute values to HTML entities.

7. Performance and Lazy Loading

The Smart Embed system is designed to minimize performance impact on the host page. The embed script is lightweight (~8 KB minified and gzipped) and loads asynchronously via the defer attribute, so it never blocks page rendering.

The data-fintactix-defer Pattern for Lazy Loading

On pages with multiple calculators — particularly calculator index pages listing many tools — loading all iframes simultaneously can impact Core Web Vitals scores and perceived page performance. The data-fintactix-defer attribute, combined with an Intersection Observer, enables true lazy loading: calculators only load when they enter the viewport.

```
<!-- All calculators use data-fintactix-defer -->
<div data-fintactix data-fintactix-defer
  data-src="https://calculators.fintactix.net/firstnational/savings/s01"
  data-token="your-token" data-title="Savings Calculator" data-min-height="450">
</div>

<script src="https://cdn.fintactix.com/embed/v1/fintactix-embed.js" defer></script>
<script src="https://cdn.fintactix.com/embed/v1/fintactix-accordion.js" defer></script>
<script>
// Intersection Observer lazy-load for deferred embeds
document.addEventListener('DOMContentLoaded', function() {
  var observer = new IntersectionObserver(function(entries) {
    entries.forEach(function(entry) {
      if (entry.isIntersecting && window.FintactixEmbed) {
        window.FintactixEmbed.init(entry.target);
        observer.unobserve(entry.target);
      }
    });
  }, { rootMargin: '200px' }); // pre-load 200px before viewport

  document.querySelectorAll('[data-fintactix-defer]').forEach(function(el) {
    observer.observe(el);
  });
});
</script>
```

Analytics Accuracy Note

The data-src lazy-load pattern serves a secondary purpose beyond performance: analytics accuracy. When data-fintactix-defer is used, the iframe request to calculators.fintactix.net only fires when a user actively opens or scrolls to that calculator. This makes Fintactix server-side usage logs a reliable proxy for actual engagement — not just page load counts. This is particularly important for accordion implementations and calculator index pages.

8. Analytics Integration

The Smart Embed system fires events to Google Analytics 4 and Adobe Analytics as users interact with calculators. These events appear in your analytics platform alongside standard page-level data, enabling calculator-specific reporting without any additional configuration.

Google Analytics 4 Events

The following events are automatically fired to the GA4 data stream configured on the parent page:

Event Name	Description & Parameters
fintactix_calculator_load	Fires when the calculator iframe has fully loaded and is interactive. Parameters: calculator_id, calculator_name, institution.
fintactix_first_interaction	Fires the first time a user changes any field value. Indicates active engagement beyond passive page view.
fintactix_results_viewed	Fires when the calculator displays results (after the first calculation). Parameters: calculator_id.
fintactix_email_results	Fires when a user submits their email address via the Email Results feature. Parameters: calculator_id. This is your primary lead capture event.
fintactix_cta_click	Fires when a user clicks the CTA button adjacent to results. Parameters: calculator_id, cta_text, cta_url.

Source Attribution with ?source=

Use the ?source= parameter to segment calculator engagement by placement. For example, a mortgage calculator appearing on the homepage, a product page, and a landing page can each be tracked separately:

```
data-src="...mortgage/m01?source=homepage"
data-src="...mortgage/m01?source=product-page"
data-src="...mortgage/m01?source=lp-mortgage-refinance"
```

The source value appears in GA4 as a parameter on all fintactix_* events, enabling comparison of engagement quality across placements.

GA4 Custom Dimensions

To segment calculator data in GA4 reports, register these as custom dimensions in your GA4 property under Configure → Custom Definitions:

Dimension Name	Scope & Description
calculator_id	Event-scoped. The machine name of the calculator (e.g., m01, a03).

Dimension Name	Scope & Description
calculator_name	Event-scoped. The human-readable name (e.g., “Mortgage Payment Calculator”).
institution	Event-scoped. Your institution’s subfolder identifier.
source	Event-scoped. The value passed via the ?source= URL parameter.

9. Accessibility

All Fintactix Financial Calculators are maintained to WCAG 2.2 Level AA compliance. This section covers what compliance means in the context of an embedded calculator and what your institution's implementation responsibilities are.

Fintactix Responsibilities

- All 88 calculators in the library are tested against WCAG 2.2 Level AA using automated tools (axe-core) and manual keyboard and screen reader testing.
- The data-title attribute is applied as the iframe's accessible name, satisfying WCAG 4.1.2 for the iframe element.
- All calculator inputs use native HTML5 input types, explicit label associations, and ARIA attributes where required.
- Highcharts result visualizations include accessible data tables and keyboard-navigable chart controls.
- Color contrast meets 4.5:1 for normal text and 3:1 for large text and UI components throughout.
- Touch targets meet the WCAG 2.2 SC 2.5.8 minimum 24×24 CSS pixel requirement.

Your Institution's Responsibilities

- **Always include data-title.** This is the only WCAG-required attribute on the placeholder div. Use a descriptive name matching the calculator's function.
- **Ensure surrounding page content is accessible.** The calculator itself is compliant, but headings, descriptive text, and links you place around it on the product page must also meet WCAG 2.2 requirements.
- **Test with your institution's specific CMS and page template.** Template-level issues (missing skip links, keyboard traps in menus, focus management) can affect the user's ability to reach and interact with the embedded calculator.

VPAT / ACR Documentation

A Voluntary Product Accessibility Template (VPAT) documenting WCAG 2.2 Level AA conformance for the Fintactix Financial Calculator library is available on request. Contact info@fintactix.com.

Reporting Accessibility Issues

If you or a user identifies an accessibility issue with a specific calculator, contact info@fintactix.com with the calculator name/ID and a description of the issue. Fintactix targets remediation within 5 business days for high-severity issues.

10. Testing and Troubleshooting

Pre-Launch Checklist

7. Calculator loads and displays correctly in Chrome, Firefox, and Safari.
8. Calculator loads on iOS Safari and Android Chrome (test on actual devices if possible).
9. iframe resizes correctly when results are displayed.
10. Email Results feature submits successfully (check for confirmation message).
11. CTA button links to the correct destination URL.
12. No console errors in browser developer tools.
13. Page passes basic keyboard navigation: Tab reaches the iframe, Enter activates focused elements inside the calculator.
14. Screen reader announces the iframe with the name set in data-title.

Common Issues

Symptom	Diagnosis & Fix
Calculator shows blank / does not load	Check the browser console for errors. Most common causes: (1) incorrect data-token — copy fresh from Calculator Home Page; (2) the domain is not on the authorized domain list — contact Fintactix to add it; (3) a CSP is blocking frame-src for calculators.fintactix.net.
Calculator loads but does not resize	Confirm fintactix-embed.js is loading without errors. Check that no CSS on the parent page is constraining the iframe height with !important.
Accordion calculator never loads	Confirm data-fintactix-defer is present on the placeholder AND fintactix-accordion.js is included. Both are required. Without the accordion script, deferred embeds never initialize.
CMS strips data attributes	Switch to Full HTML text format (Drupal) or use a Code Block / Embed element (WordPress, Squarespace, Webflow). Avoid Rich Text or WYSIWYG editors for the embed code.
Embed code breaks across multiple lines	Collapse the placeholder div to a single HTML line. Some CMS text filters strip attributes from elements spanning multiple lines.
Scrollbar appears inside iframe	Increase data-min-height. The calculator's content may exceed the minimum height during initial load.

Checking the Embed Token

Your embed token is available on your institution's Calculator Home Page (the index page listing all your calculators). If you are unsure of your Calculator Home Page URL, contact info@fintactix.com.

Tokens are institution-specific and domain-restricted. A token issued for firstnational.com will not authenticate embeds on a different domain.

11. Maintenance and Updates

One of the primary advantages of the Smart Embed system is that calculator updates deploy automatically. When Fintactix updates a calculator — for regulatory parameter changes, accessibility improvements, or new features — the updated version appears in all embedded instances without any action required from your institution.

What Updates Automatically

- Regulatory parameter updates (IRS contribution limits, conforming loan limits, FHAVA rates, Social Security thresholds, etc.)
- WCAG 2.2 compliance fixes and improvements
- Browser compatibility fixes
- Calculation accuracy corrections
- UI and interaction improvements

What Requires Your Action

- **Adding a new calculator to a page.** Place a new placeholder div with the appropriate data-src URL.
- **Domain changes.** If your institution changes its domain, contact Fintactix to update the authorized domain list. Embeds will stop loading on the old domain automatically once the DNS change propagates.

Monitoring

Fintactix does not currently provide automated uptime monitoring for embedded calculators. If a calculator stops loading on your site, contact info@fintactix.com with the calculator's name and URL. For urgent issues affecting live customer-facing pages, include "urgent" in the subject line.

Fintactix does monitor server uptime. If a system-wide issue occurs, Fintactix will contact your designated technical contact. For isolated issues specific to your implementation, contact info@fintactix.com.

12. SEO and Calculator Pages

A common concern when embedding calculators via iframe is the impact on search engine optimization. This section explains how Fintactix addresses SEO at the system level and what your institution can do to maximize the organic search value of calculator pages.

How Search Engines Treat Iframes

Search engines index the parent page — not the iframe content. The calculator’s HTML, text, and structured data are not directly crawled from inside the iframe. This means the SEO value of calculator pages depends primarily on the content of the surrounding page, not the calculator itself.

This is a feature, not a limitation. Your product page retains full ownership of its SEO footprint. The calculator does not introduce duplicate content, competing pages, or indexing conflicts.

JSON-LD Schema Injection

The Smart Embed system automatically injects structured data (JSON-LD) into the parent page for each embedded calculator. This includes FinancialProduct and WebApplication schema, with the calculator name, description, and Fintactix as the provider.

This structured data can produce rich results in Google Search for calculator-related queries and signals to search engines that the page is a financial tool, not just informational content.

On-Page SEO Recommendations

- **Write a descriptive page title.** Include the calculator name and institution: “Mortgage Payment Calculator | First National Bank” outperforms “Calculators”.
- **Write a meta description.** Describe what the calculator does and who it serves. This appears in search results and directly affects click-through rate.
- **Include 150–300 words of surrounding copy.** Explain what the calculator does, what inputs it requires, and what the results mean. This is the primary content search engines use to understand the page.
- **Use proper heading structure.** An h1 naming the calculator, h2 subheadings for sections below it (e.g., “How to Use This Calculator”, “Understanding Your Results”).
- **Internal link from related pages.** Product pages, blog posts about mortgage rates or auto financing, and the calculator index page should all link to individual calculator pages.
- **Use descriptive URL structure.** /calculators/mortgage/payment-calculator performs better than /calculators?id=m01.

SEO Performance Expectations

Calculator pages typically rank for long-tail queries: “mortgage payment calculator community bank”, “credit union auto loan payment estimator”, “HELOC payment calculator”. These queries have high commercial intent and lower competition than generic financial queries targeted by large comparison sites.

Institutions that combine well-structured calculator pages with surrounding content (how-to guides, rate context, FAQ sections) consistently see calculator pages appear in the top 10 results for institution-specific and geography-specific calculator queries within 60–90 days of publish.

13. Support and Next Steps

Contact Information

Contact	Details
Technical support	info@fintactix.com — for implementation questions, troubleshooting, domain authorization, and accessibility documentation requests.
Account and billing	billing@fintactix.com — for contract questions, adding calculator categories, and Navigator product inquiries.
Documentation	fintactix.com/documentation — this guide and supporting reference documents.
Calculator Home Page	Your institution-specific URL provided during onboarding. Contains your embed token, calculator URLs, and CTA configuration settings.

Common Next Steps After Implementation

- Verify analytics.** Confirm that fintactix_calculator_load and fintactix_first_interaction events are appearing in your GA4 DebugView within 24 hours of launch.
- Register GA4 custom dimensions.** Add calculator_id, calculator_name, institution, and source as event-scoped custom dimensions in your GA4 property to enable calculator-specific reporting.
- Configure the CTA destination.** Set the CTA URL on your Calculator Home Page to point to your application portal, pre-qualification form, or loan officer contact page.
- Test Email Results.** Submit a test email address through the Email Results feature and confirm the lead appears in your lead management system.
- Add calculators to product pages.** Embed relevant calculators on each lending product page (mortgage, auto, home equity, personal loan) as the primary interactive element above the fold.
- Submit your sitemap.** After adding calculator pages, submit an updated sitemap to Google Search Console to accelerate indexing.

Adding Additional Calculator Categories

Fintactix Financial Calculators are organized into 11 categories: Mortgage, Auto, Home Equity, Savings, Retirement, Debt, Budget, Insurance, and three additional specialty categories. Your subscription determines which categories are licensed for your institution.

To add a new category or individual calculator, contact your Fintactix account contact or email billing@fintactix.com. New calculators are typically available within 5 business days of contract activation.

Financial Navigators

Financial Navigators are guided digital lending experiences that extend the calculator program into the decision phase of the borrower journey. Where calculators answer “what is my payment?”, Navigators answer “which loan is right for me?” — collecting full borrower context and producing decision-ready leads with loan officer briefings.

Navigators are available for Mortgage, Home Affordability, Vehicle Loan, and Home Equity. Contact Fintactix to schedule a demonstration.

Thank you for choosing Fintactix Financial Calculators

We are committed to keeping your calculator program accurate, accessible, and performing well for your borrowers. If you have any questions not covered in this guide, contact info@fintactix.com.