Overview

Floify provides an in-house e-signature solution supporting customized fields from both the borrower and lender side.

LO teams can create an e-signature request directly in the borrower's loan flow. The loan's borrower(s) will be notified that there is a new e-signature request awaiting their attention and the borrower(s) will be prompted to log in to their Floify account, which will then identify their signature role.

Once an e-signature request has been completed by all recipients, the document will be delivered to the yellow pending bucket of the Floify loan flow to await final review and approval.

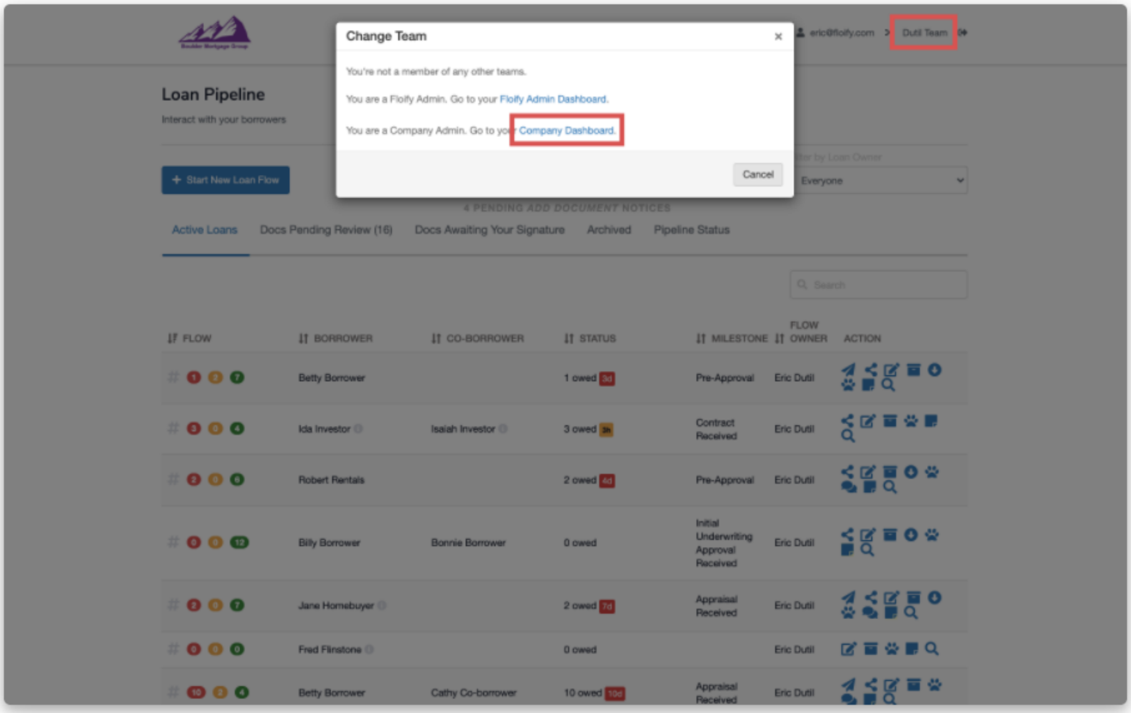
This help article provides a tutorial on how to install Floify E-Sign, create one-off Floify E-Sign requests, and set up Floify E-Sign templates.

> Compliance
>
> Floify follows the E-Sign Act and UETA. Most vendors, including Fannie Mae, do not require additional approval. If additional approval is requested or you need additional compliance documents, please reach out to support@floify.com.

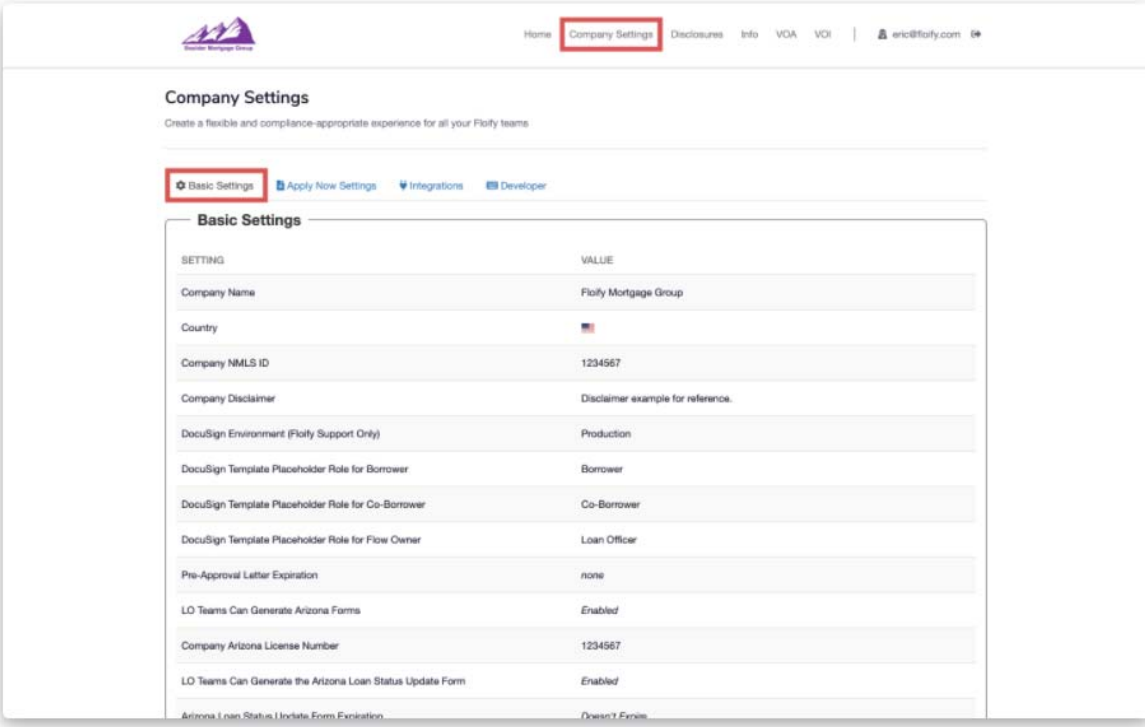
How to Set Up and Use

Install Floify E-Sign

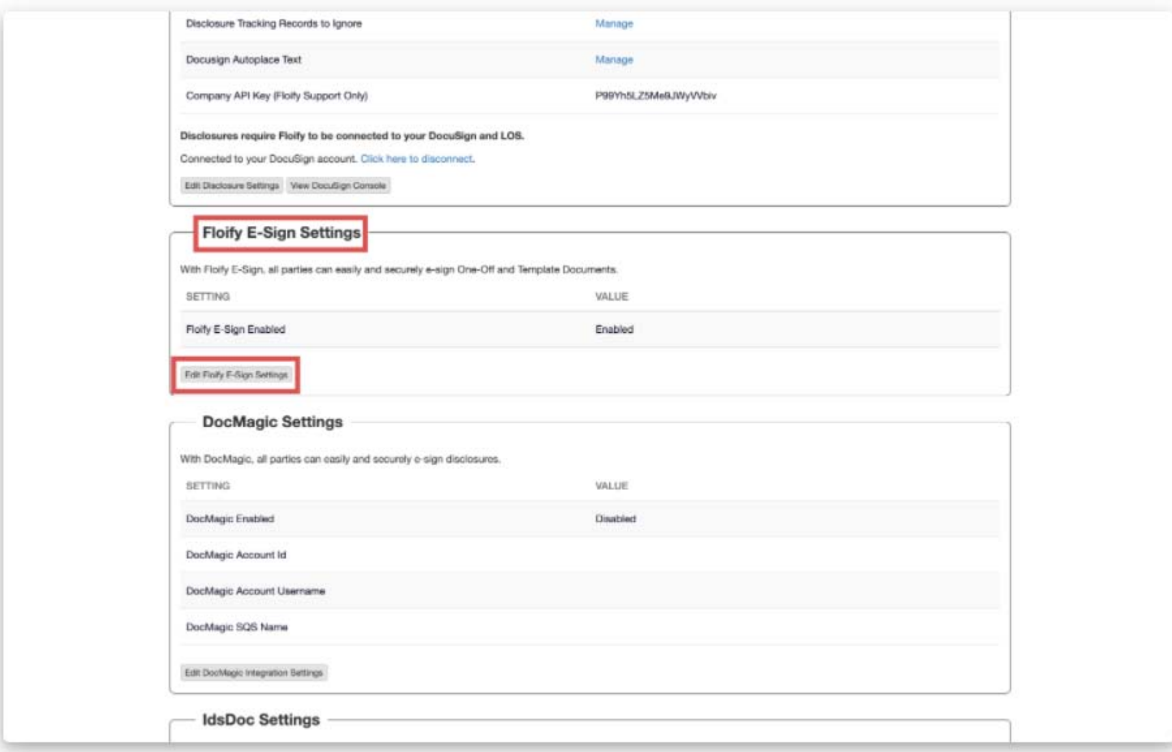
From the team pipeline, choose the ***team name*** in the upper right-hand corner and select the option to navigate to the ***Company Dashboard:***



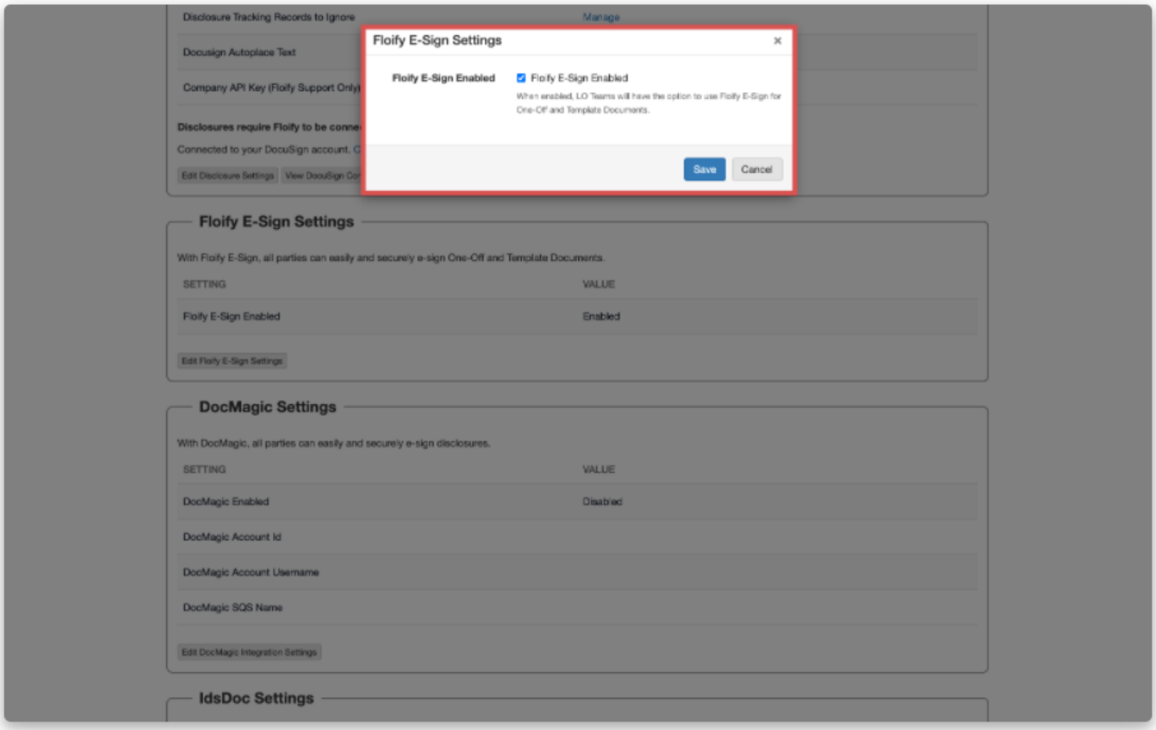
Navigate to ***Company Settings*** and select ***Basic Settings:***



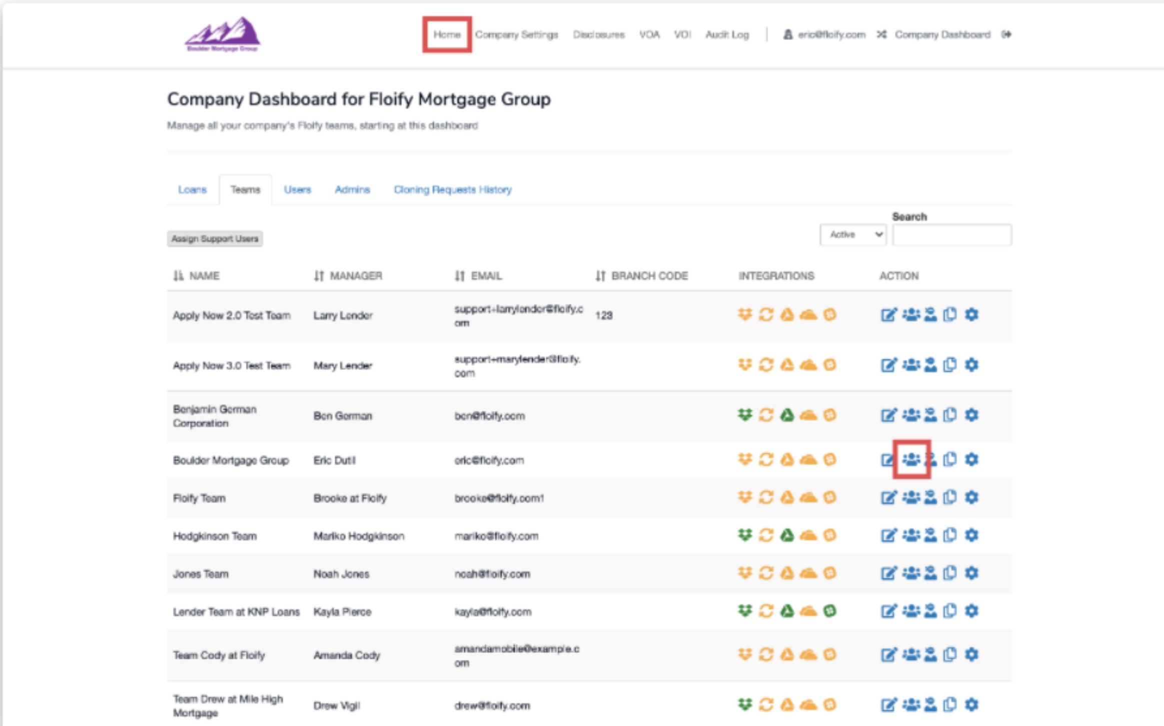
Scroll down to ***Floify E-Sign Settings*** and select the option to ***Edit Floify E-Sign Settings:***



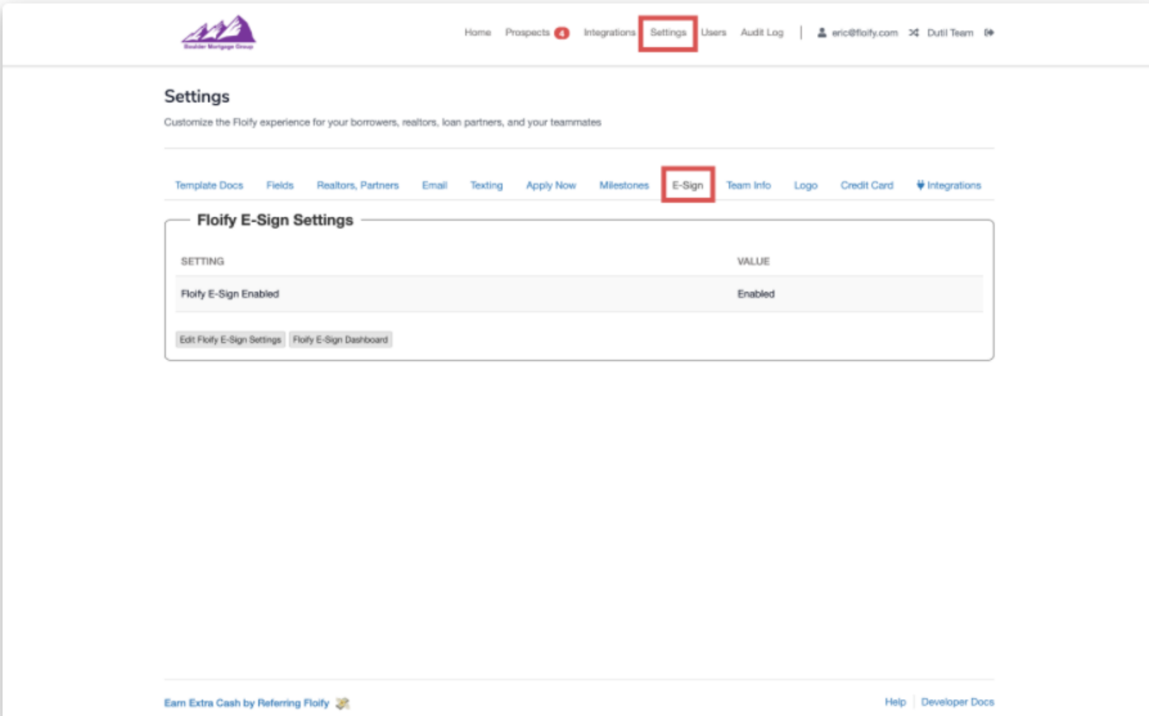
Select the option to enable. Make sure you select ***Save*** to confirm the changes:



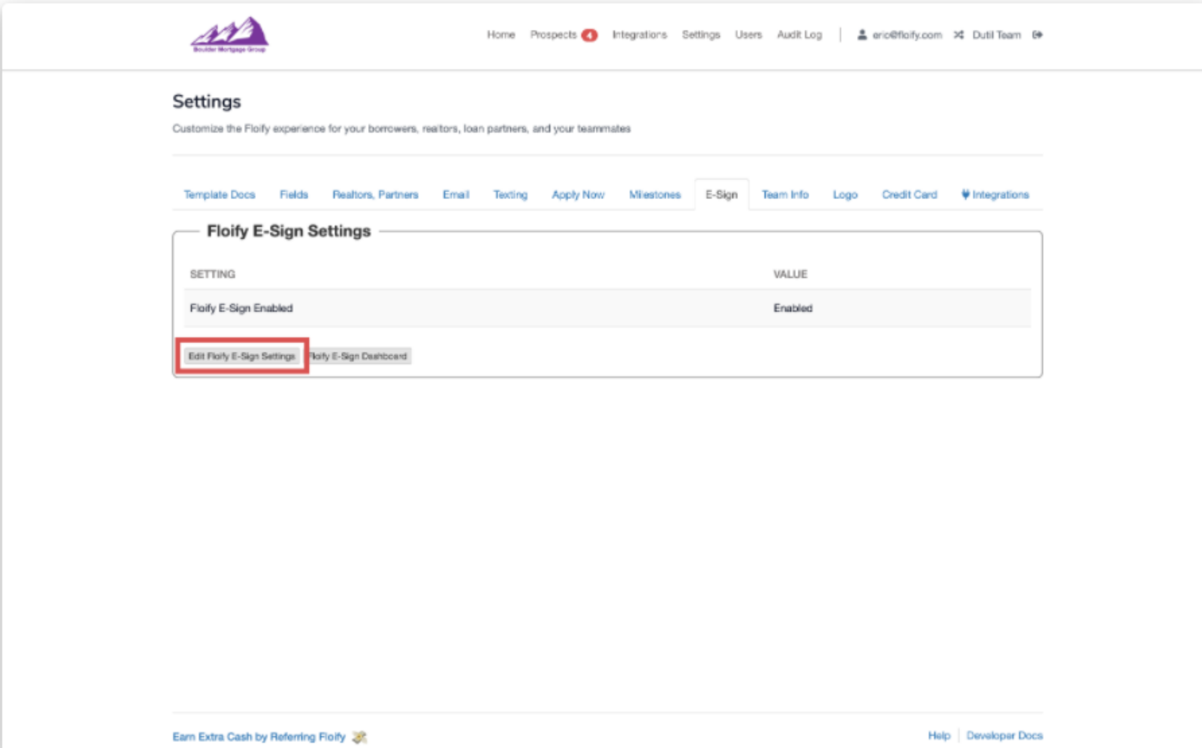
Navigate to ***Home*** and switch back into the user's account:



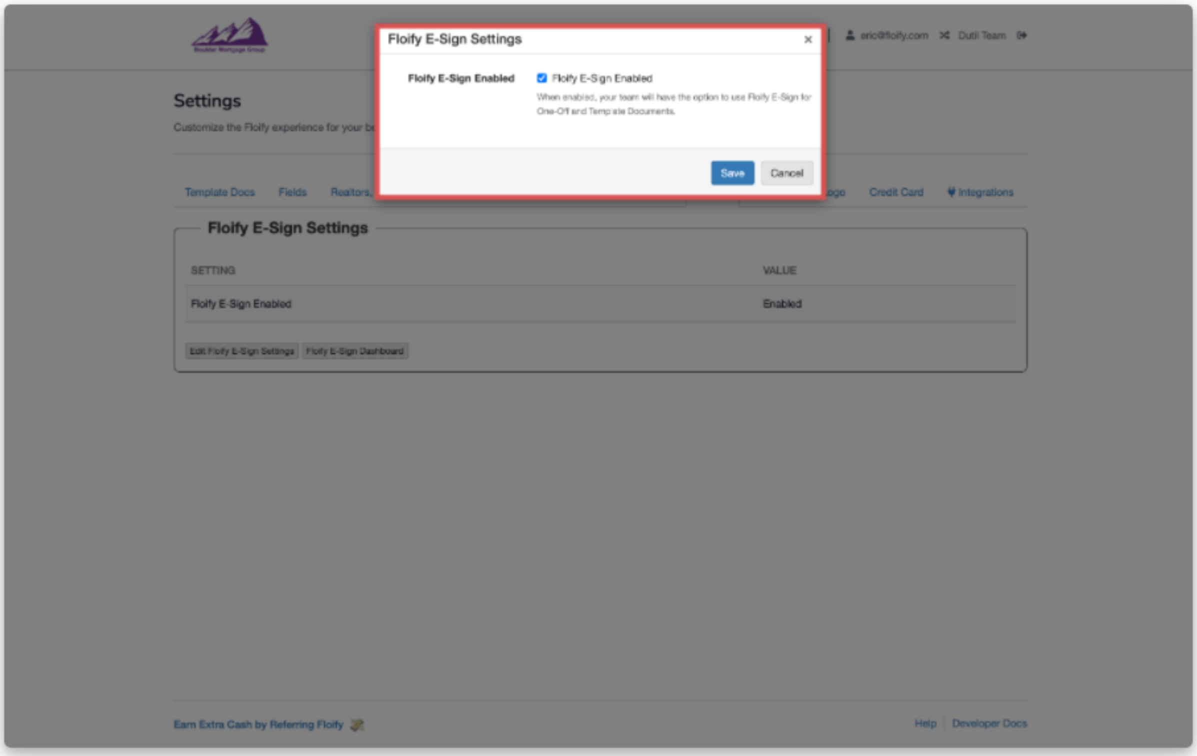
From your team pipeline, navigate to ***Settings*** then select the ***E-Sign*** tab:



Select the option to ***Edit Floify E-Sign Settings***.

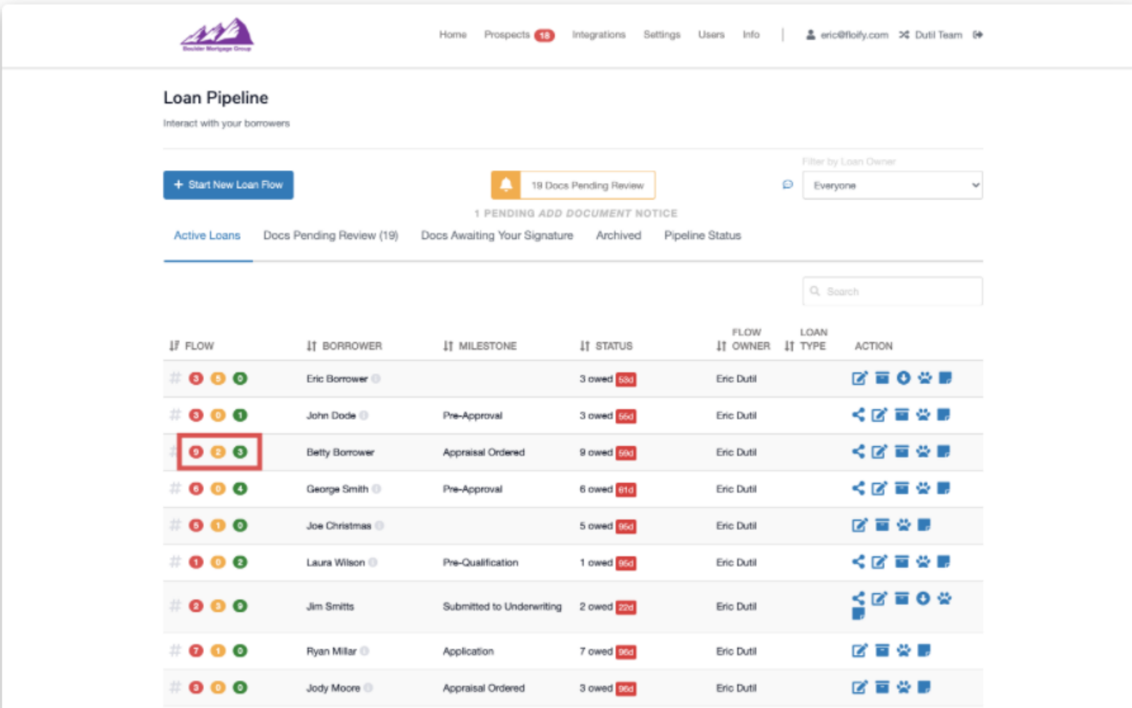


Select the option to enable the integration. Make sure you select ***Save*** to confirm your changes:

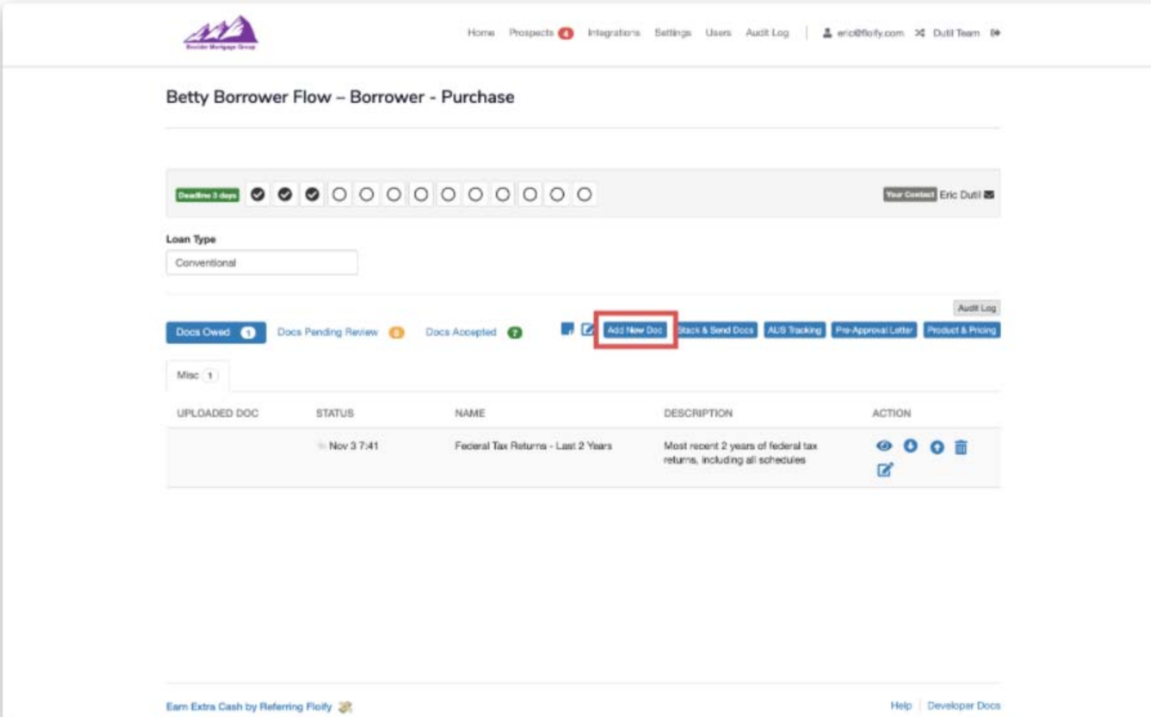


Request a One-Off Floify E-Signature Request

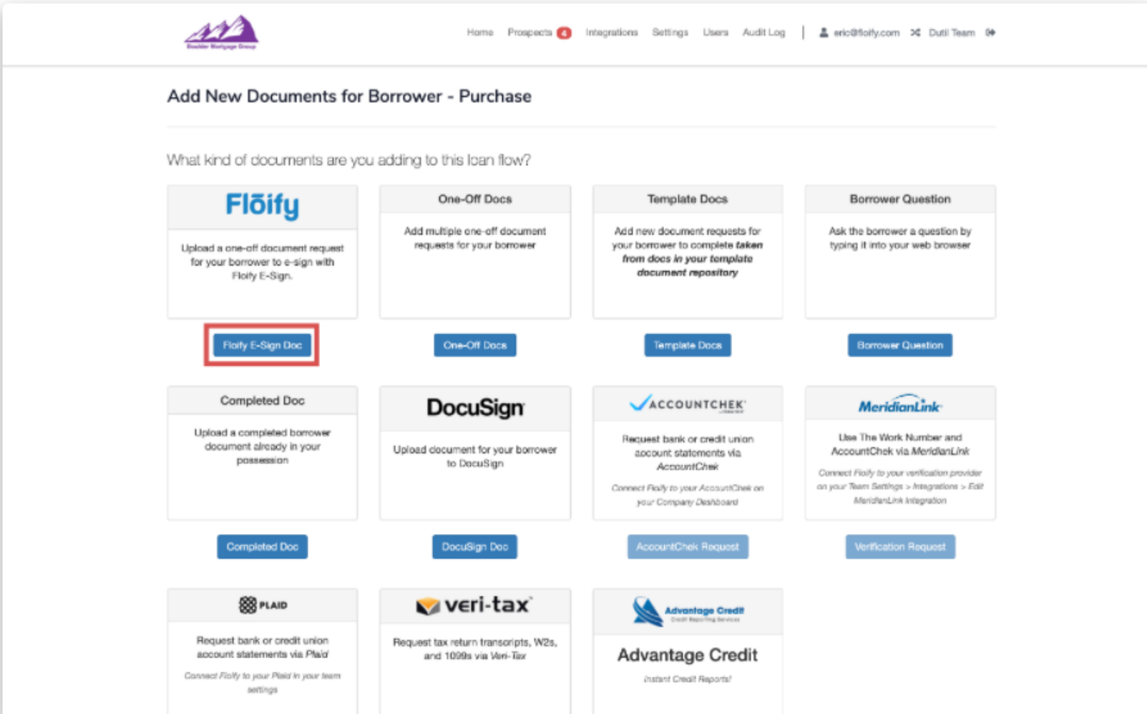
From your team pipeline, navigate into the borrower's loan flow using the red, yellow, or green icons towards the left hand side of the borrower's name:



Click on the ***Add New Doc*** button:

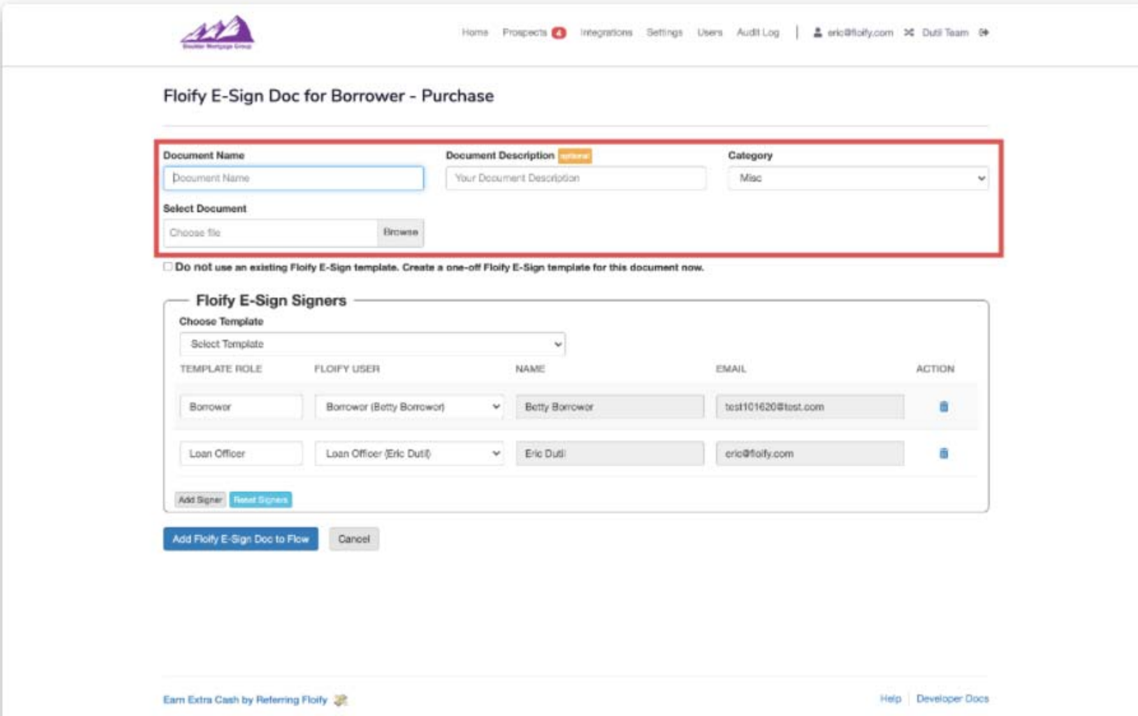


Select the ***Floify E-Sign Doc*** *option:*

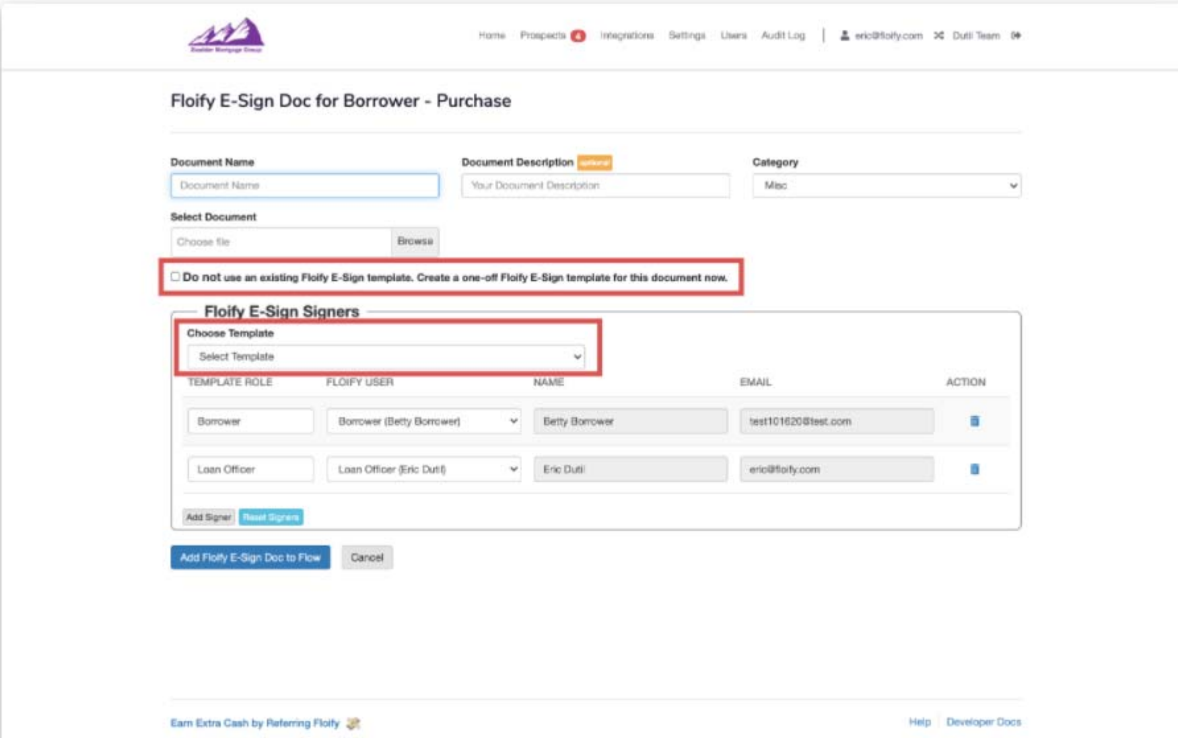


Enter a document name, and select your document from your computer. You can also add an optional document description or select a category if you'd like:

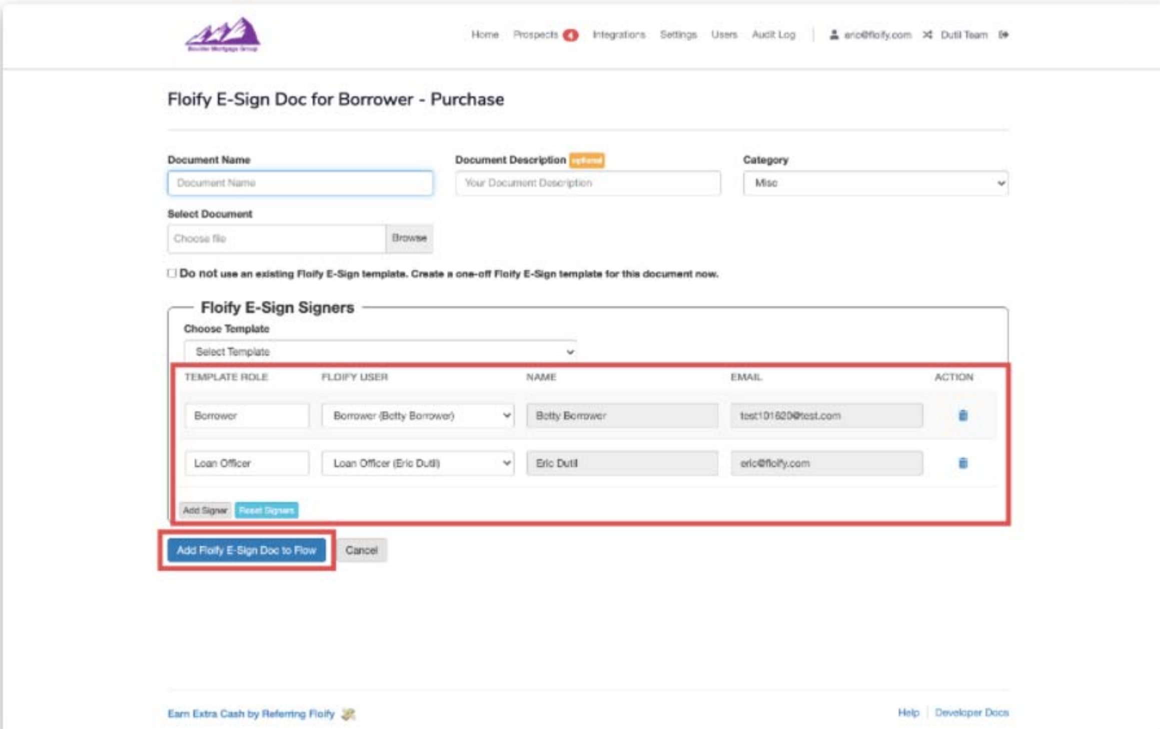
Note: You must upload a PDF to proceed.



Choose whether or not you'd like to use a Floify E-Sign template. If you aren't using a template, select the checkbox to indicate this. If you are, select a template from the dropdown:

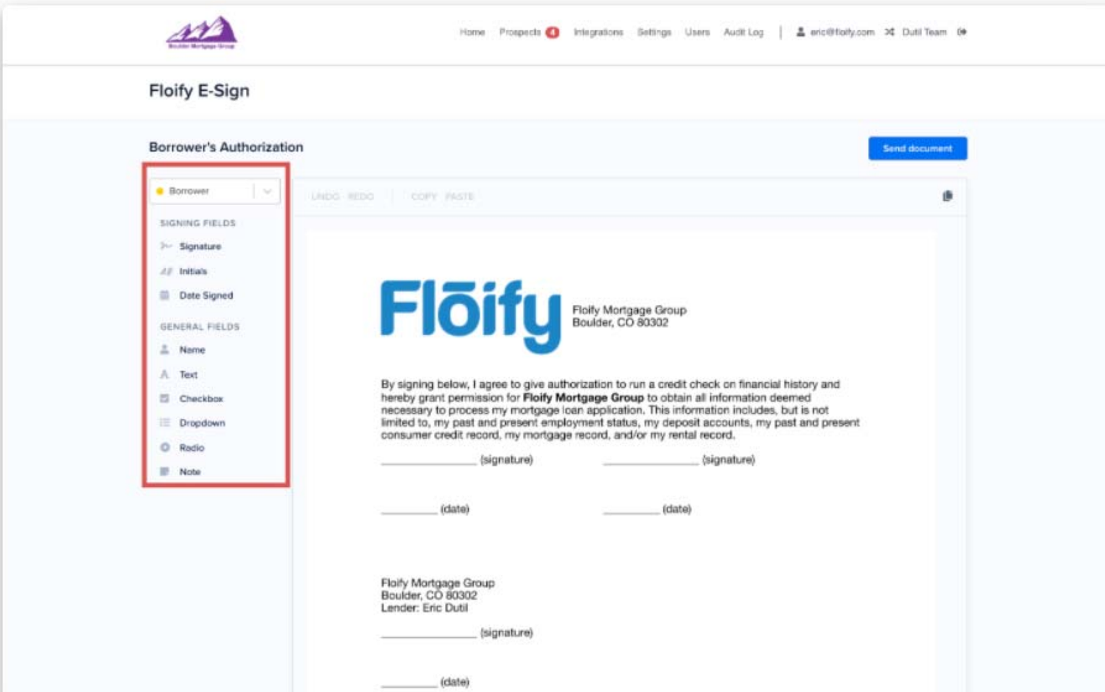


Designate your signers. Make sure you select ***Add Floify E-Sign Doc to Flow*** to proceed:

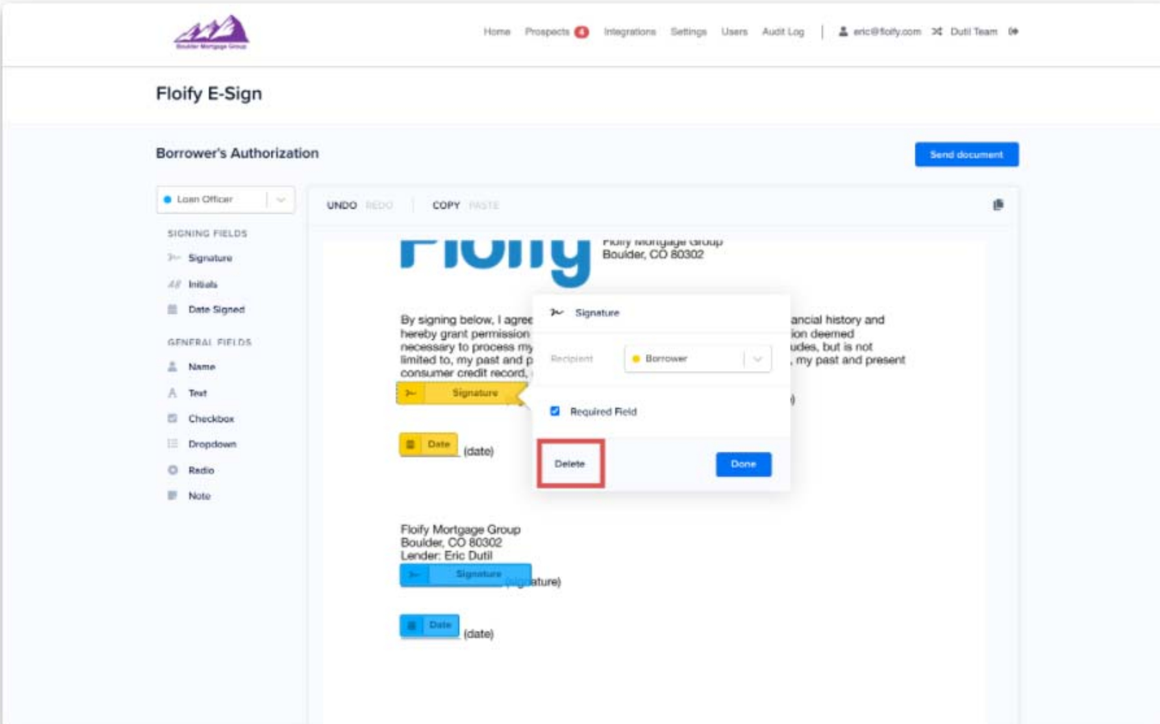


Select the recipient with the dropdown list on the left side of the document. Drag and drop the e-sign fields on the left side onto your template. Follow the guides below to change recipients and delete fields. Each recipient will be designated a specific color:

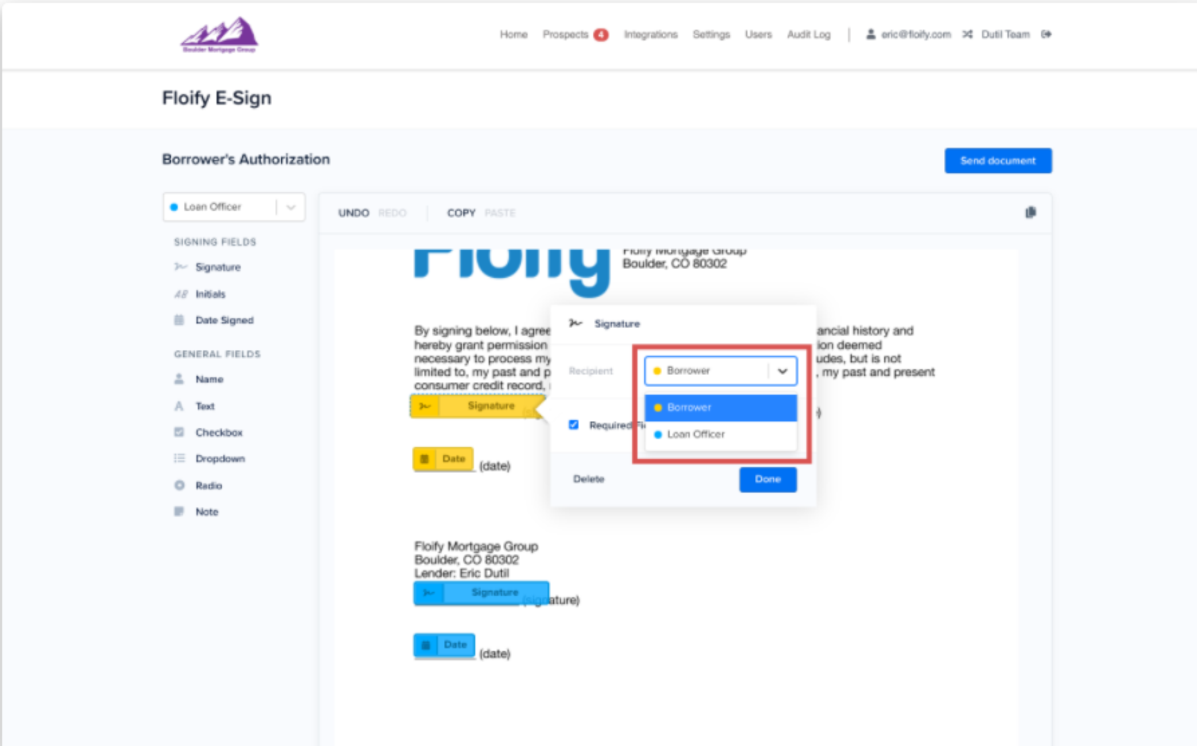
Note: The fields that are available for use are Signature, Initials, Date Signed, Name, Text, Checkbox, Dropdown, Radio, and Note.



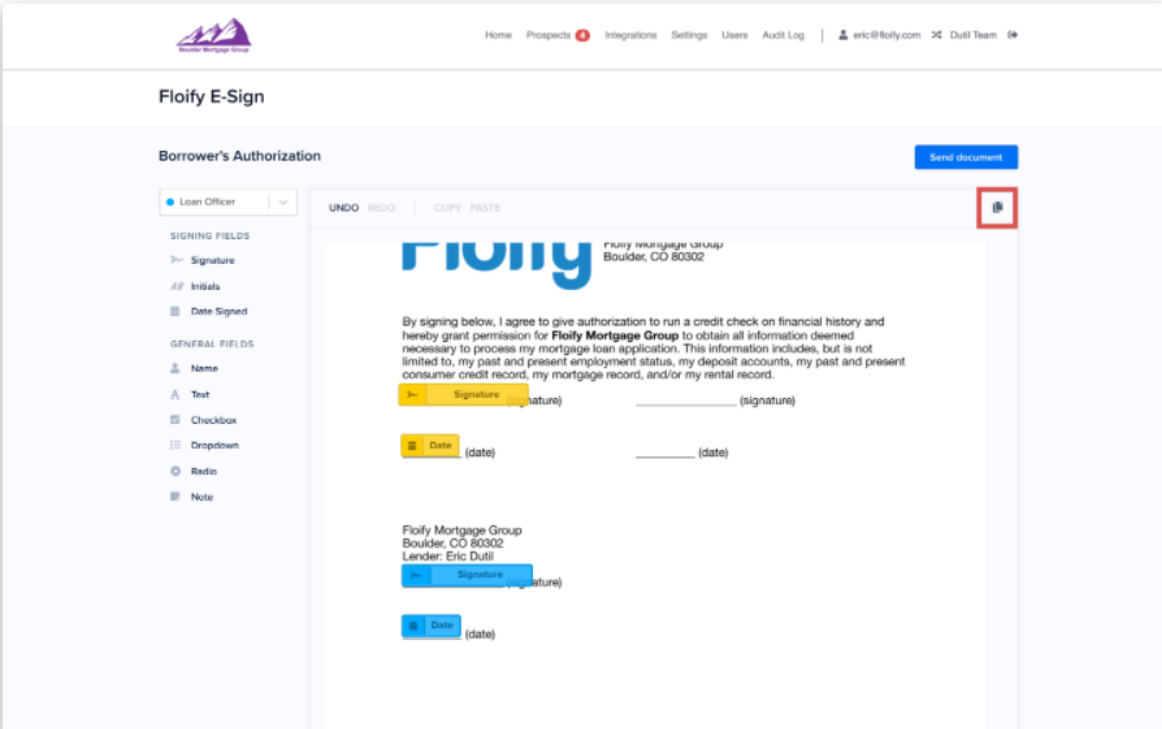
Click a field on the template, and select the ***Delete*** option to remove the field from the template:



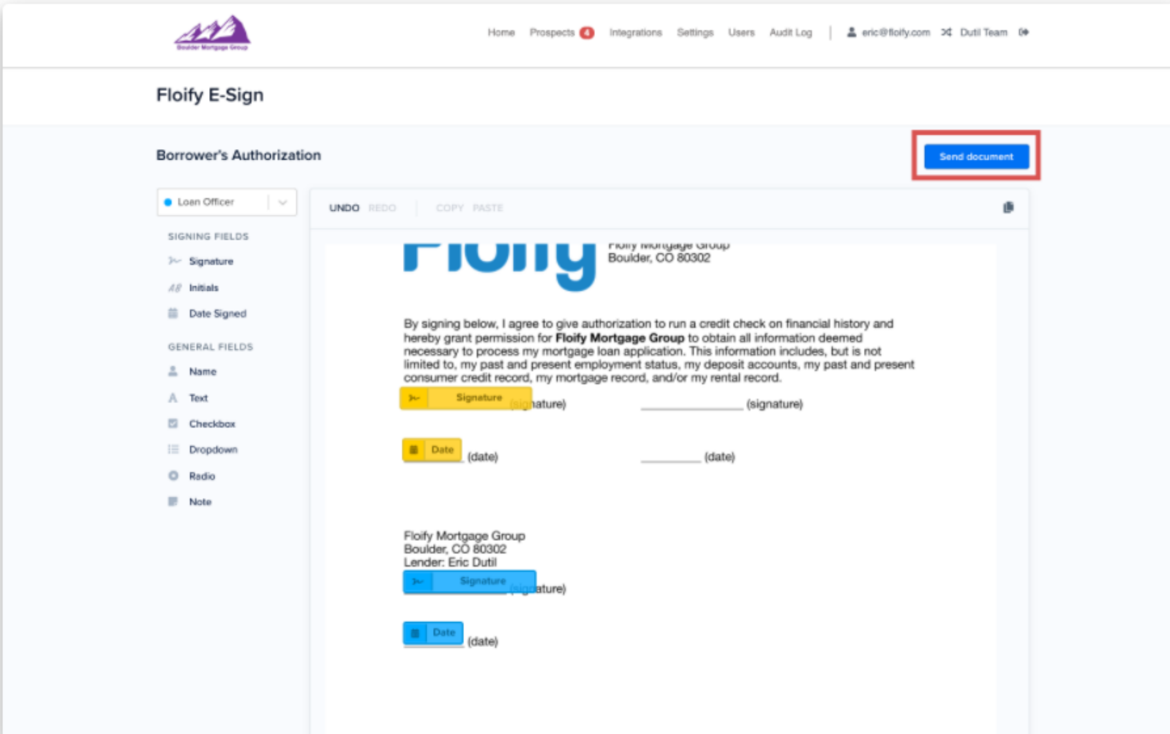
Change the recipient of a field already on the template by clicking the field and using the dropdown menu to select a different recipient:



Easily navigate to additional pages in the template by selecting the pages icon in the right corner:

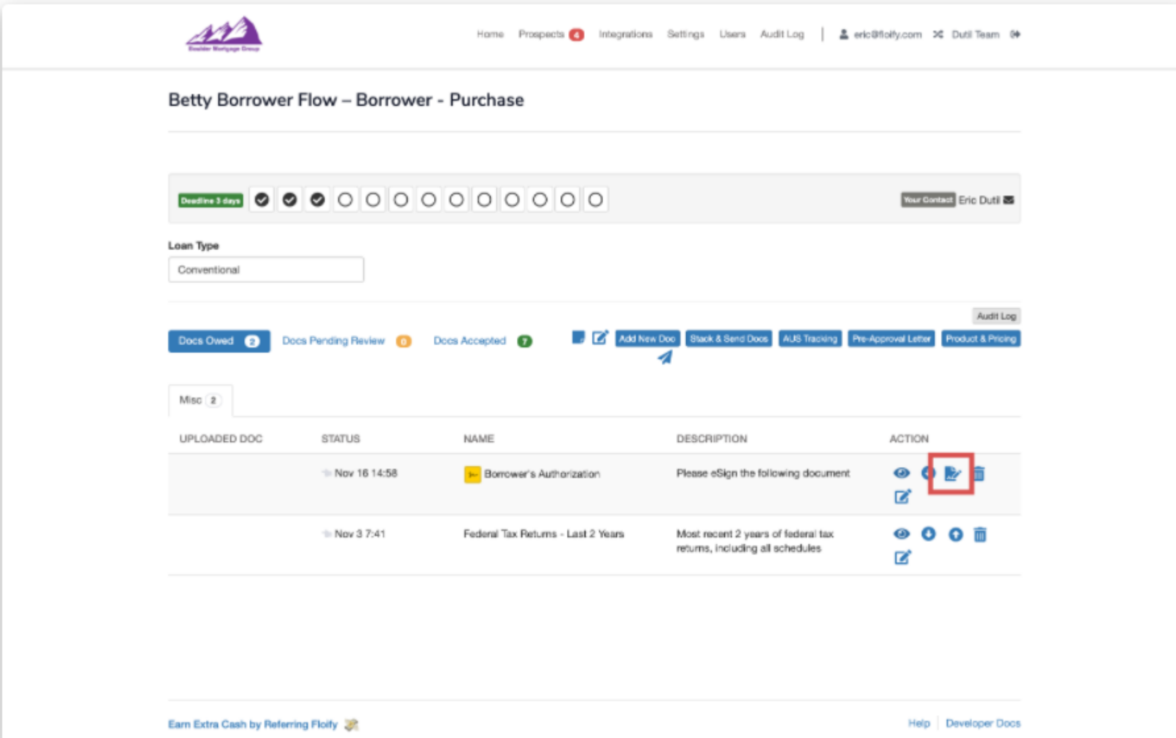


Once the template is completed with fields and recipients, select the ***Send Document*** option:

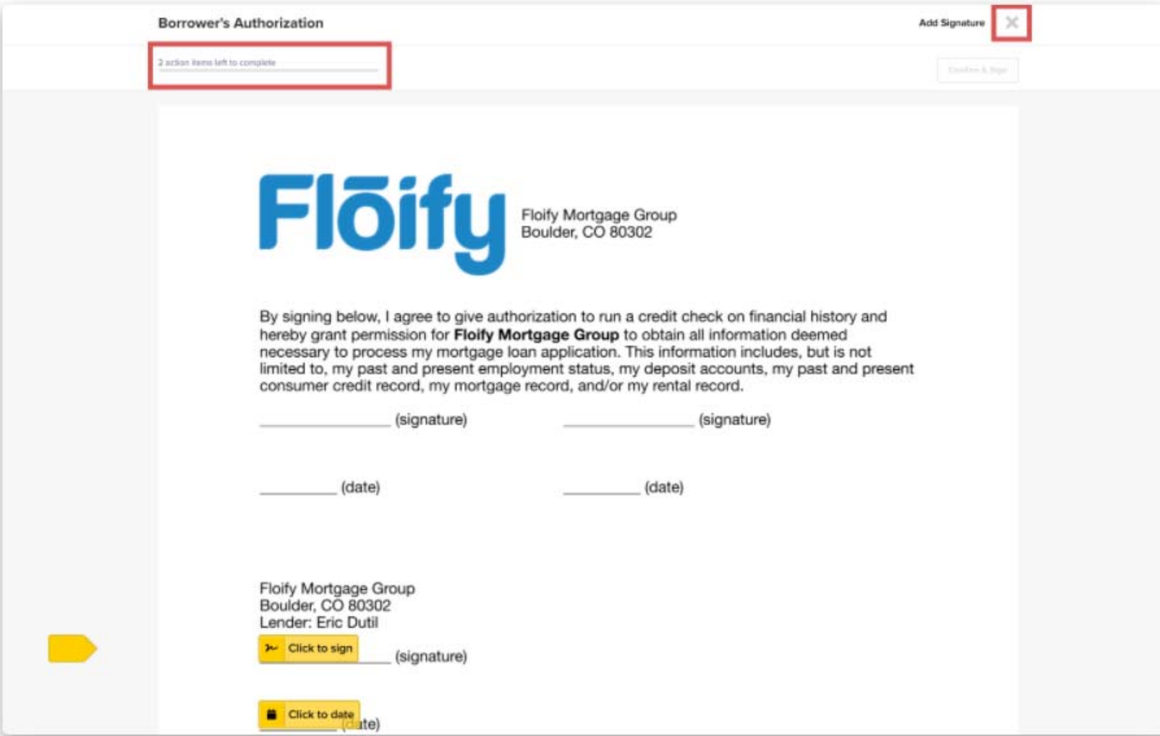


This sends the document to the borrower's ***Docs Owed*** section of the loan flow where the borrower can click the E-Sign icon to adopt a signature and sign.

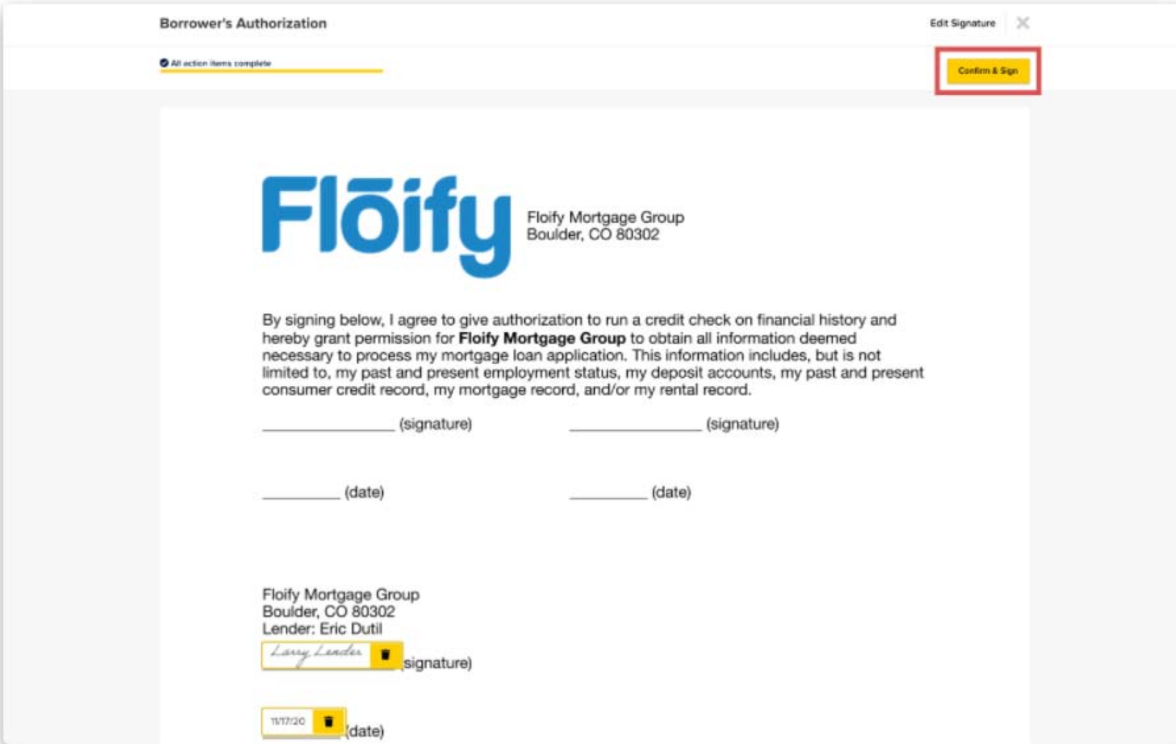
If you need to sign the document, you will select the E-Sign icon within the loan flow:



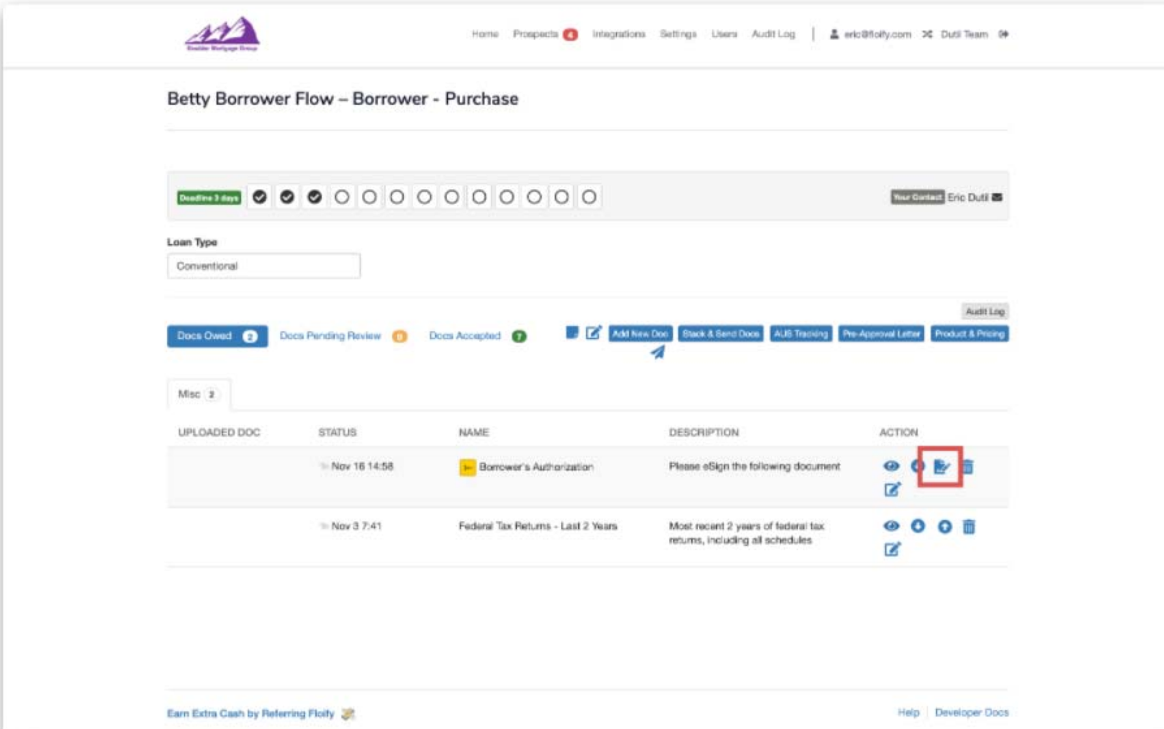
Once in the document, you will see the fields available to complete. There will be a status bar at the top left showing how many actions are still needed. The close icon in the upper right-hand corner will take you back to the ***Docs Owed:***



Select the option to ***Confirm and Sign*** once all the fields have been completed:



Once signed, the document will remain in the ***Docs Owed*** until all recipients have completed the signing process:



******NOTE – ONLY PDF FORMATS ARE AVAILABLE FOR UPLOAD******

******NOTE CURRENTLY COMPLETED DOCUMENTS DO NOT AUTOMATICALLY IMPORT TO THE EFOLDER WHEN ACCEPTED BUT MUST BE MANUUALLY DOWNLOADED AND THEN ADDED TO ENCOMPASS******