

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.

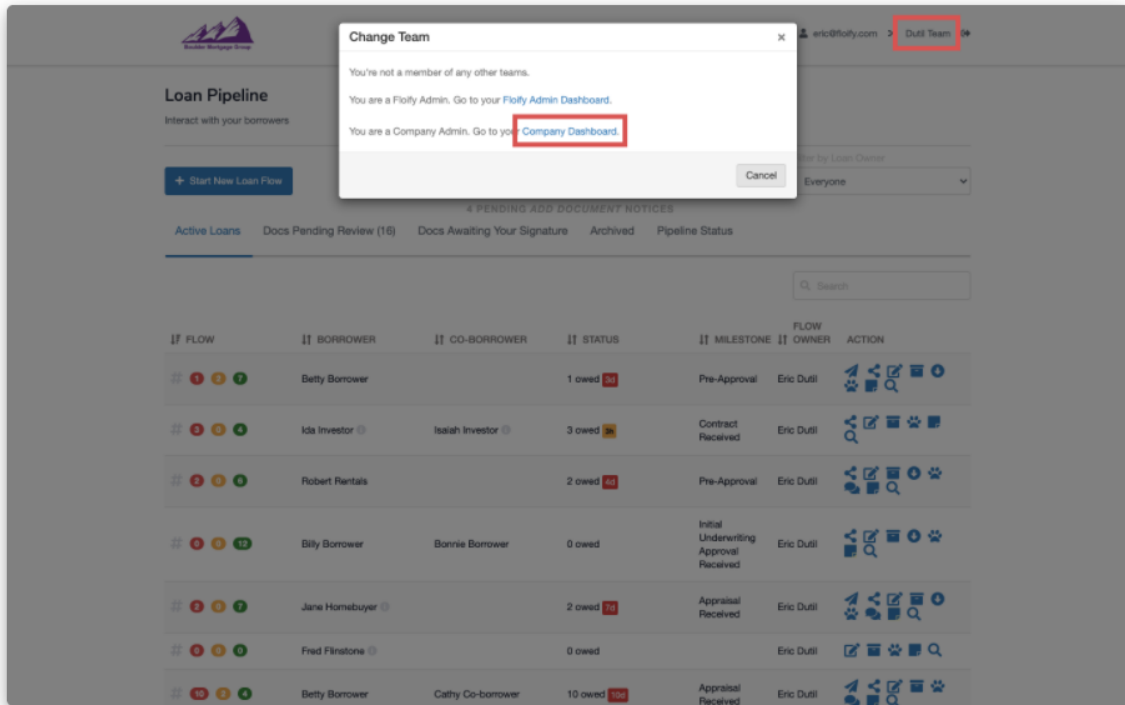
Compliance

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**:

Home **Company Settings** Disclosures Info VOA VCI | eric@floify.com

Company Settings

Create a flexible and compliance-appropriate experience for all your Floify teams

Basic Settings Apply Now Settings Integrations Developer

Basic Settings

SETTING	VALUE
Company Name	Floify Mortgage Group
Country	
Company NMLS ID	1234567
Company Disclaimer	Disclaimer example for reference.
DocuSign Environment (Floify Support Only)	Production
DocuSign Template Placeholder Role for Borrower	Borrower
DocuSign Template Placeholder Role for Co-Borrower	Co-Borrower
DocuSign Template Placeholder Role for Flow Owner	Loan Officer
Pre-Approval Letter Expiration	none
LO Teams Can Generate Arizona Forms	Enabled
Company Arizona License Number	1234567
LO Teams Can Generate the Arizona Loan Status Update Form	Enabled
Arizona Loan Status Update Form Expiration	Doesn't Expire

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

Disclosure Tracking Records to Ignore [Manage](#)

DocuSign Autoplace Text [Manage](#)

Company API Key (Floify Support Only) P9R7hSLZ5Me8JWYVbiv

Disclosures require Floify to be connected to your DocuSign and LOS.
 Connected to your DocuSign account. [Click here to disconnect.](#)
[Edit Disclosure Settings](#) [View DocuSign Console](#)

Floify E-Sign Settings

With Floify E-Sign, all parties can easily and securely e-sign One-Off and Template Documents.

SETTING	VALUE
Floify E-Sign Enabled	Enabled

[Edit Floify E-Sign Settings](#)

DocMagic Settings

With DocMagic, all parties can easily and securely e-sign disclosures.

SETTING	VALUE
DocMagic Enabled	Disabled
DocMagic Account Id	
DocMagic Account Username	
DocMagic SQS Name	

[Edit DocMagic Integration Settings](#)

IdsDoc Settings

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

The screenshot shows a settings interface with a modal window titled "Floify E-Sign Settings" in the foreground. The modal contains a checkbox labeled "Floify E-Sign Enabled" which is checked. Below the checkbox, there is explanatory text: "When enabled, LO Teams will have the option to use Floify E-Sign for One-Off and Template Documents." At the bottom of the modal are "Save" and "Cancel" buttons. The background settings page is dimmed and includes sections for "Disclosure Tracking Records to Ignore", "DocuSign Autoplace Text", "Company API Key (Floify Support Only)", "Disclosures require Floify to be connected", "Floify E-Sign Settings", "DocMagic Settings", and "IdsDoc Settings".

Floify E-Sign Settings

Floify E-Sign Enabled Floify E-Sign Enabled

When enabled, LO Teams will have the option to use Floify E-Sign for One-Off and Template Documents.

[Save](#) [Cancel](#)

Floify E-Sign Settings

With Floify E-Sign, all parties can easily and securely e-sign One-Off and Template Documents.

SETTING	VALUE
Floify E-Sign Enabled	Enabled

[Edit Floify E-Sign Settings](#)

DocMagic Settings

With DocMagic, all parties can easily and securely e-sign disclosures.

SETTING	VALUE
DocMagic Enabled	Disabled

DocMagic Account Id

DocMagic Account Username

DocMagic SQS Name

[Edit DocMagic Integration Settings](#)

IdsDoc Settings

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

Company Dashboard for Floify Mortgage Group
Manage all your company's Floify teams, starting at this dashboard

Loans Teams Users Admins Cloning Requests History

Assign Support Users Active

NAME	MANAGER	EMAIL	BRANCH CODE	INTEGRATIONS	ACTION
Apply Now 2.0 Test Team	Larry Lender	support-larrylender@floify.com	123		
Apply Now 3.0 Test Team	Mary Lender	support-marylender@floify.com			
Benjamin German Corporation	Ben Gorman	ben@floify.com			
Boulder Mortgage Group	Eric Dutil	eric@floify.com			
Floify Team	Brooke at Floify	brooke@floify.com			
Hodgkinson Team	Mariko Hodgkinson	mariko@floify.com			
Jones Team	Noah Jones	noah@floify.com			
Lender Team at KNP Loans	Kayla Pierce	kayla@floify.com			
Team Cody at Floify	Amanda Cody	amandamobile@example.com			
Team Drew at Mile High Mortgage	Drew Vigil	drew@floify.com			

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

The screenshot shows the Floify Settings interface. At the top, the navigation bar includes 'Home', 'Prospects', 'Integrations', 'Settings' (highlighted with a red box), 'Users', and 'Audit Log'. Below this, the 'Settings' section is titled 'Customize the Floify experience for your borrowers, realtors, loan partners, and your teammates'. A secondary navigation bar contains 'Template Docs', 'Fields', 'Realtors, Partners', 'Email', 'Texting', 'Apply Now', 'Milestones', 'E-Sign' (highlighted with a red box), 'Team Info', 'Logo', 'Credit Card', and 'Integrations'. The main content area is titled 'Floify E-Sign Settings' and contains a table with the following data:

SETTING	VALUE
Floify E-Sign Enabled	Enabled

Below the table are two buttons: 'Edit Floify E-Sign Settings' and 'Floify E-Sign Dashboard'. At the bottom of the page, there is a footer with the text 'Earn Extra Cash by Referring Floify' and 'Help | Developer Docs'.

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

The screenshot shows the Floify Settings interface. At the top, there is a navigation bar with the Floify logo and links for Home, Prospects (with a notification icon), Integrations, Settings, Users, Audit Log, a user profile for eric@floify.com, and a Duff Team group. Below the navigation bar is the 'Settings' section with the subtitle 'Customize the Floify experience for your borrowers, realtors, loan partners, and your teammates'. A horizontal menu contains various settings categories: Template Docs, Fields, Realtors, Partners, Email, Texting, Apply Now, Milestones, E-Sign (which is the active tab), Team Info, Logo, Credit Card, and Integrations. The 'Floify E-Sign Settings' section is highlighted with a red box. It contains a table with two columns: 'SETTING' and 'VALUE'. The table has one row: 'Floify E-Sign Enabled' with the value 'Enabled'. Below the table, there are two buttons: 'Edit Floify E-Sign Settings' (highlighted with a red box) and 'Floify E-Sign Dashboard'. At the bottom of the page, there is a footer with the text 'Earn Extra Cash by Referring Floify' and a 'Help | Developer Docs' link.

Home Prospects 1 Integrations Settings Users Audit Log | eric@floify.com Duff Team

Settings

Customize the Floify experience for your borrowers, realtors, loan partners, and your teammates

Template Docs Fields Realtors, Partners Email Texting Apply Now Milestones **E-Sign** Team Info Logo Credit Card Integrations

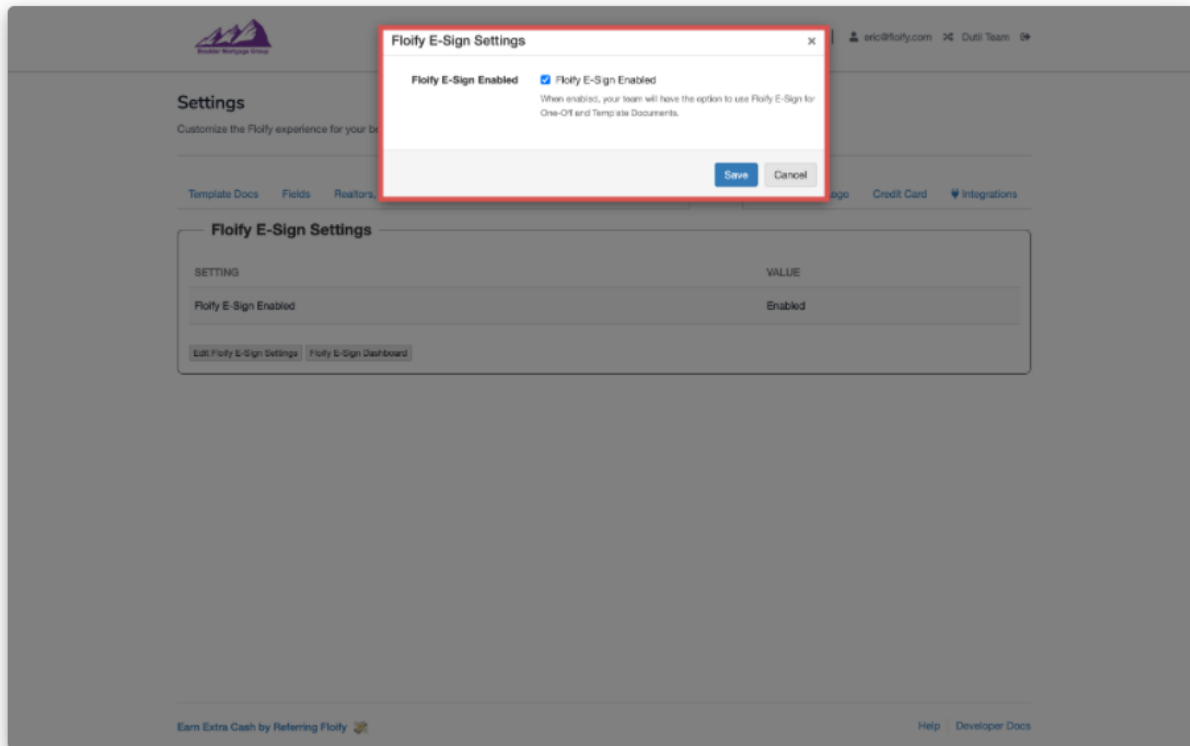
Floify E-Sign Settings

SETTING	VALUE
Floify E-Sign Enabled	Enabled

[Edit Floify E-Sign Settings](#) [Floify E-Sign Dashboard](#)

Earn Extra Cash by Referring Floify [Help](#) | [Developer Docs](#)

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



The screenshot shows a web application interface with a modal dialog box titled "Floify E-Sign Settings" centered on the screen. The dialog box has a red border and contains the following text:

Floify E-Sign Enabled Floify E-Sign Enabled
When enabled, your team will have the option to use Floify E-Sign for One-Off and Template Documents.

At the bottom of the dialog box, there are two buttons: "Save" and "Cancel".

The background of the screenshot shows the "Settings" page of the Floify application. The page title is "Settings" and the subtitle is "Customize the Floify experience for your business". There are several tabs: "Template Docs", "Fields", "Realtors", "Logo", "Credit Card", and "Integrations". The "Floify E-Sign Settings" section is visible below the tabs, showing a table with the following content:

SETTING	VALUE
Floify E-Sign Enabled	Enabled

At the bottom of the page, there is a footer with the text "Earn Extra Cash by Referring Floify" and "Help Developer Docs".

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:

The screenshot displays the Floify Loan Pipeline interface. At the top, there is a navigation bar with links for Home, Prospects (18), Integrations, Settings, Users, and Info. The user profile is shown as eric@floify.com and Dutil Team. The main heading is "Loan Pipeline" with the subtitle "Interact with your borrowers". Below this, there is a button to "Start New Loan Flow" and a notification for "19 Docs Pending Review". A filter dropdown is set to "Everyone". The interface shows a list of loan flows with columns for FLOW, BORROWER, MILESTONE, STATUS, FLOW OWNER, LOAN TYPE, and ACTION. The 'FLOW' column contains three colored icons (red, yellow, green) for each row. The row for "Betty Borrower" has these three icons highlighted with a red box.

FLOW	BORROWER	MILESTONE	STATUS	FLOW OWNER	LOAN TYPE	ACTION
3 1 2	Eric Borrower		3 owed 66d	Eric Dutil		[Action Icons]
3 1 1	John Dode	Pre-Approval	3 owed 66d	Eric Dutil		[Action Icons]
3 2 3	Betty Borrower	Appraisal Ordered	9 owed 66d	Eric Dutil		[Action Icons]
3 1 2	George Smith	Pre-Approval	6 owed 61d	Eric Dutil		[Action Icons]
3 1 2	Joe Christmas		5 owed 66d	Eric Dutil		[Action Icons]
1 2 2	Laura Wilson	Pre-Qualification	1 owed 96d	Eric Dutil		[Action Icons]
2 2 2	Jim Smitts	Submitted to Underwriting	2 owed 22d	Eric Dutil		[Action Icons]
7 1 2	Ryan Milar	Application	7 owed 66d	Eric Dutil		[Action Icons]
3 2 2	Jody Moore	Appraisal Ordered	3 owed 66d	Eric Dutil		[Action Icons]

Click on the *Add New Doc* button:

Home Prospects Integrations Settings Users Audit Log | eric@floity.com | Dull Team

Betty Borrower Flow - Borrower - Purchase

Deadline 3 days [Progress Bar] Your Contact: Eric Dull

Loan Type: Conventional

Docs Owed Docs Pending Review Docs Accepted **Add New Doc** Stack & Send Docs AUS Tracking Pre-Approval Letter Product & Pricing

Misc

UPLOADED DOC	STATUS	NAME	DESCRIPTION	ACTION
Nov 3 7:41		Federal Tax Returns - Last 2 Years	Most recent 2 years of federal tax returns, including all schedules	[Icons]

Earn Extra Cash by Referring Floity | Help | Developer Docs

Select the *Floify E-Sign Doc* option:

The screenshot shows the Floify web application interface. At the top, there is a navigation bar with the Floify logo on the left and menu items: Home, Prospects (with a red notification dot), Integrations, Settings, Users, Audit Log, and a user profile for 'eric@floify.com' with a 'Duti Team' dropdown. The main heading is 'Add New Documents for Borrower - Purchase'. Below this, a question asks 'What kind of documents are you adding to this loan flow?'. The interface displays a grid of 11 document options, each with a logo, a description, and a button. The 'Floify E-Sign Doc' button is highlighted with a red rectangular box.

Document Type	Description	Button Label
Floify	Upload a one-off document request for your borrower to e-sign with Floify E-Sign.	Floify E-Sign Doc
One-Off Docs	Add multiple one-off document requests for your borrower	One-Off Docs
Template Docs	Add new document requests for your borrower to complete taken from docs in your template document repository	Template Docs
Borrower Question	Ask the borrower a question by typing it into your web browser	Borrower Question
Completed Doc	Upload a completed borrower document already in your possession	Completed Doc
DocuSign	Upload document for your borrower to DocuSign	DocuSign Doc
ACCOUNTCHEK	Request bank or credit union account statements via AccountChek Connect Floify to your AccountChek on your Company Dashboard	AccountChek Request
MeridianLink	Use The Work Number and AccountChek via MeridianLink Connect Floify to your verification provider on your Team Settings > Integrations > Edit MeridianLink Integration	Verification Request
PLAID	Request bank or credit union account statements via Plaid Connect Floify to your Plaid in your team settings	
veri-tax	Request tax return transcripts, W2s, and 1099s via Veri-Tax	
Advantage Credit	Instant Credit Reports!	

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.

Home Prospects 2 Integrations Settings Users Audit Log | eric@floify.com Dudi Team

Floify E-Sign Doc for Borrower - Purchase

Document Name

Document Description

Category

Select Document

Do not use an existing Floify E-Sign template. Create a one-off Floify E-Sign template for this document now.

Floify E-Sign Signers

Choose Template

TEMPLATE ROLE	FLOIFY USER	NAME	EMAIL	ACTION
<input type="text" value="Borrower"/>	<input type="text" value="Borrower (Betty Borrower)"/>	<input type="text" value="Betty Borrower"/>	<input type="text" value="test101620@test.com"/>	<input type="button" value="✖"/>
<input type="text" value="Loan Officer"/>	<input type="text" value="Loan Officer (Eric Dudi)"/>	<input type="text" value="Eric Dudi"/>	<input type="text" value="eric@floify.com"/>	<input type="button" value="✖"/>

Earn Extra Cash by Referring Floify [Help](#) [Developer Docs](#)

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:

Floify E-Sign Doc for Borrower - Purchase

Document Name: Document Description: Category:

Select Document:

Do not use an existing Floify E-Sign template. Create a one-off Floify E-Sign template for this document now.

Floify E-Sign Signers

Choose Template:

TEMPLATE ROLE	FLOIFY USER	NAME	EMAIL	ACTION
<input type="text" value="Borrower"/>	<input type="text" value="Borrower (Betty Borrower)"/>	Betty Borrower	test101620@test.com	<input type="button" value="✖"/>
<input type="text" value="Loan Officer"/>	<input type="text" value="Loan Officer (Eric Dutil)"/>	Eric Dutil	eric@floify.com	<input type="button" value="✖"/>

Earn Extra Cash by Referring Floify [Help](#) [Developer Docs](#)

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

Floify E-Sign Doc for Borrower - Purchase

Document Name: Document Description: Category:

Select Document:

Do not use an existing Floify E-Sign template. Create a one-off Floify E-Sign template for this document now.

Floify E-Sign Signers

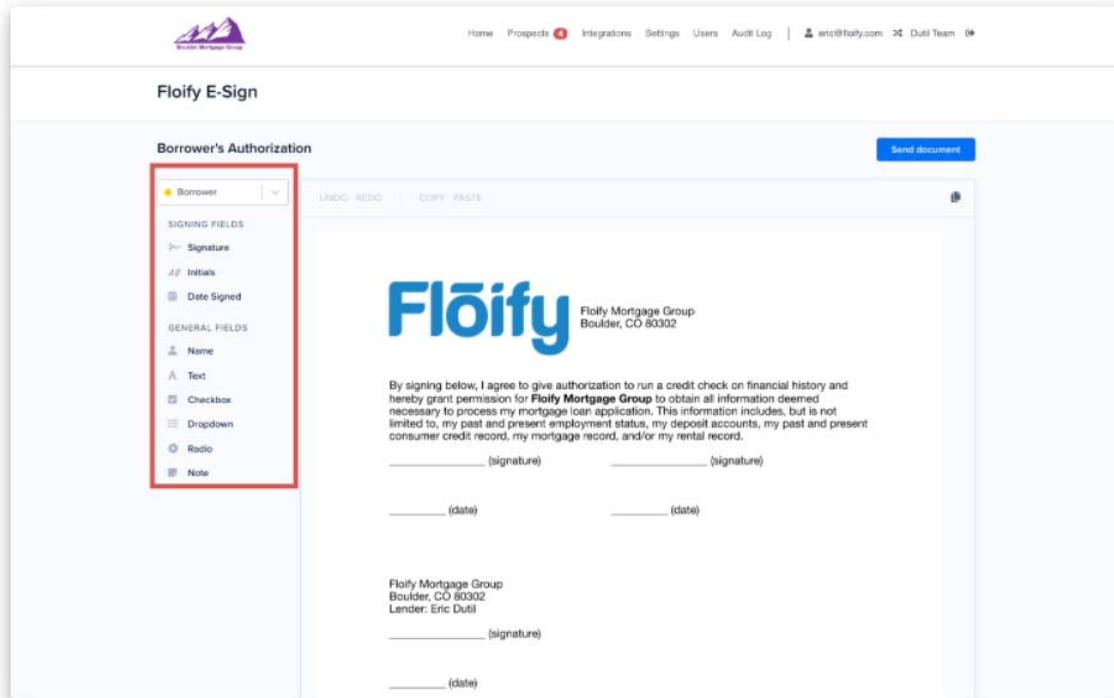
Choose Template:

TEMPLATE ROLE	FLOIFY USER	NAME	EMAIL	ACTION
<input type="text" value="Borrower"/>	<input type="text" value="Borrower (Betty Borrower)"/>	<input type="text" value="Betty Borrower"/>	<input type="text" value="test101&D@test.com"/>	<input type="button" value="✖"/>
<input type="text" value="Loan Officer"/>	<input type="text" value="Loan Officer (Eric Dutil)"/>	<input type="text" value="Eric Dutil"/>	<input type="text" value="eric@floify.com"/>	<input type="button" value="✖"/>

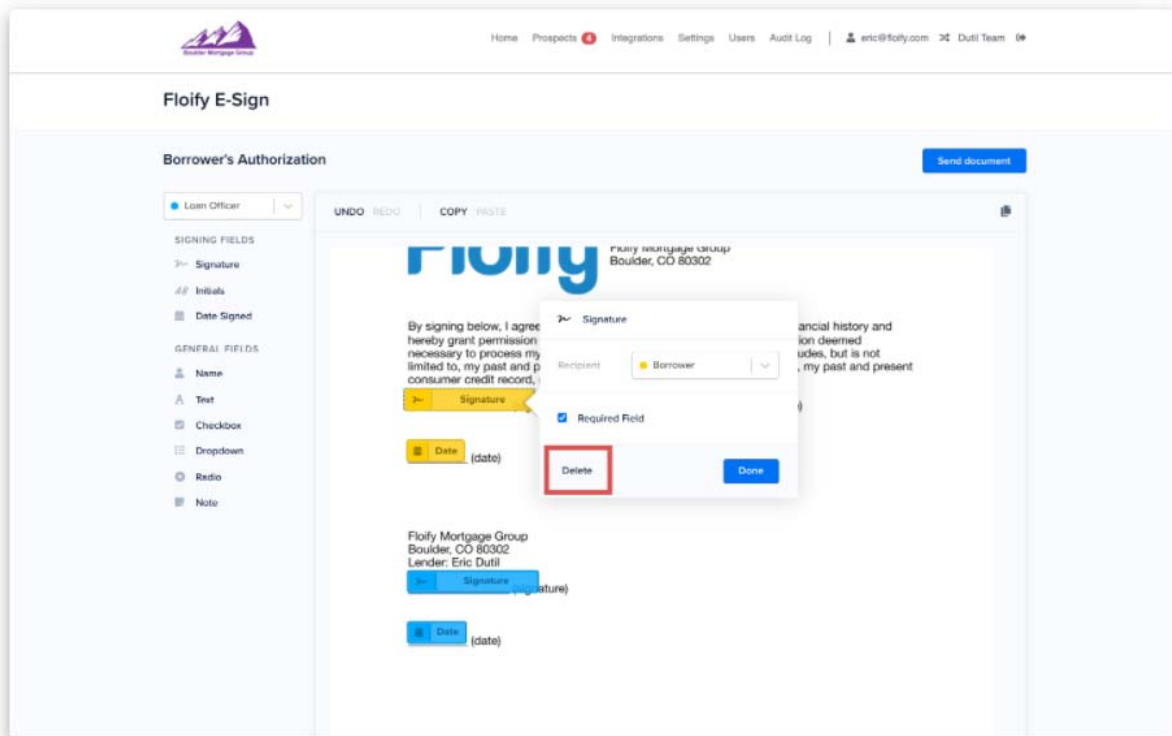
Earn Extra Cash by Referring Floify [Help](#) | [Developer Docs](#)

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:

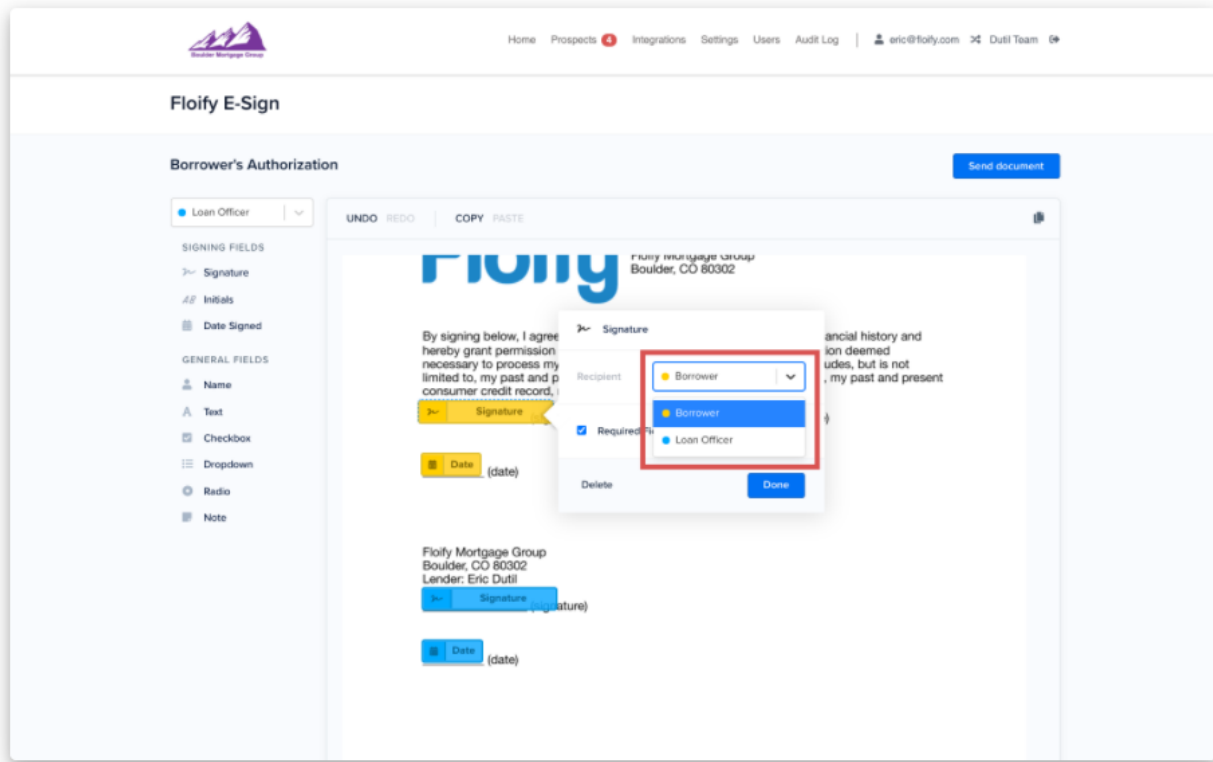
Note: The fields that are available for use are Signature, Initials, Date Signed, Name, Text, Checkbox, Dropdown, Radio, and Note.



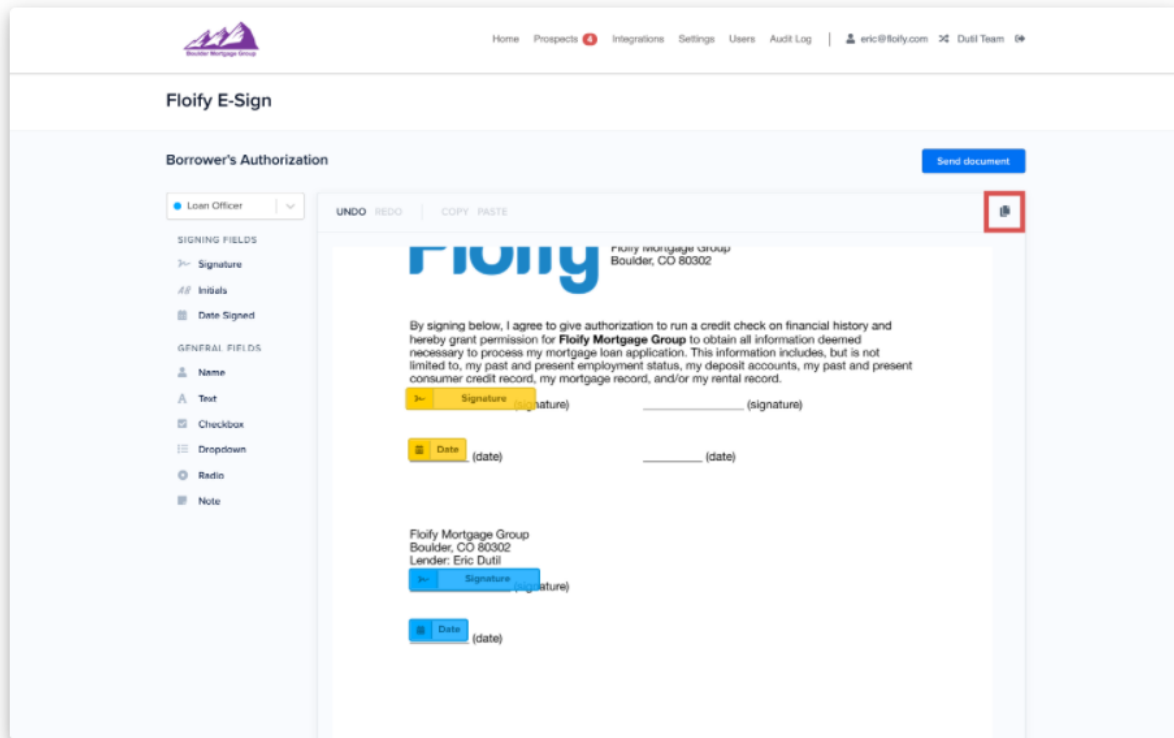
Click a field on the template, and select the **Delete** option to remove the field from the template:



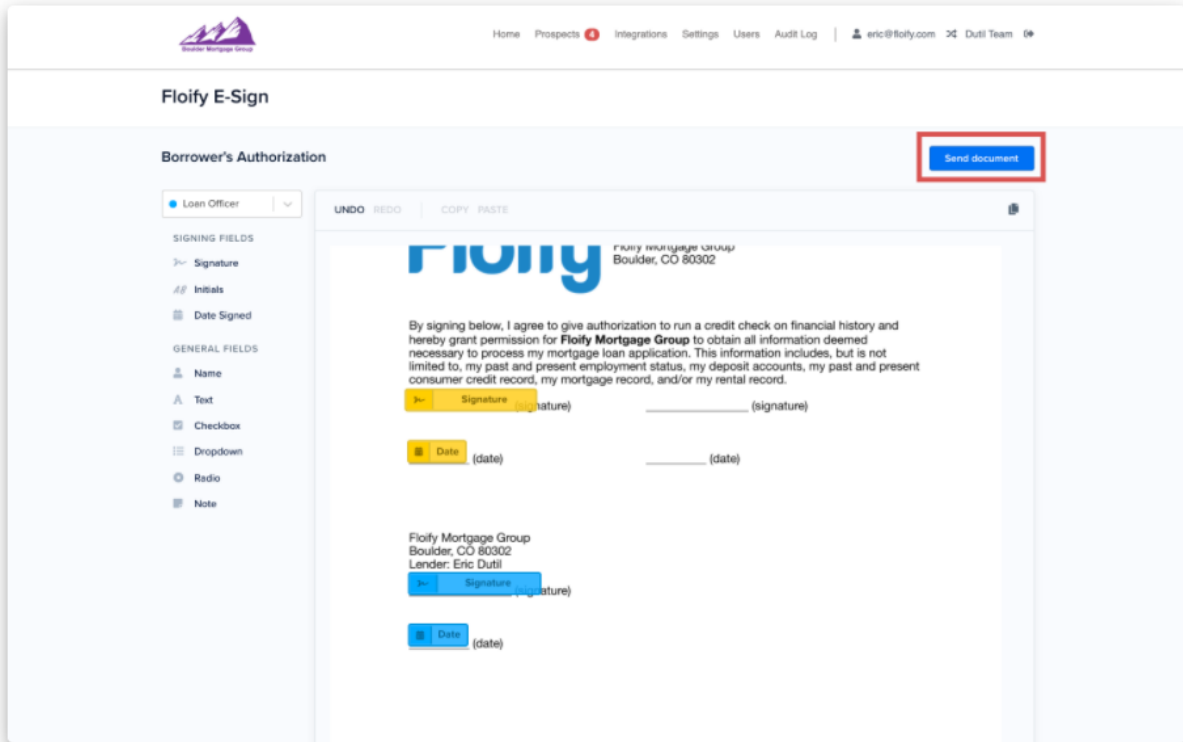
Change the recipient of a field already on the template by clicking the field and using the dropdown menu to select a different recipient:



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:

The screenshot shows a web application interface for a borrower flow. At the top, there is a navigation bar with the logo on the left and links for Home, Prospects (with a red notification dot), Integrations, Settings, Users, Audit Log, and a user profile for Eric Duff. Below the navigation bar, the page title is "Betty Borrower Flow - Borrower - Purchase".



The main content area includes a progress indicator with a green bar labeled "Deadline 3 days" and a series of 10 circles, some of which are filled. To the right of the progress bar is a "Your Contact" dropdown menu showing "Eric Duff".

Below the progress bar is a "Loan Type" dropdown menu set to "Conventional".

A horizontal menu contains several buttons: "Docs Owed" (with a blue icon), "Docs Pending Review" (with an orange icon), "Docs Accepted" (with a green icon), "Add New Doc" (with a blue icon), "Stack & Send Docs" (with a blue icon), "AUS Tracking" (with a blue icon), "Pre-Approval Letter" (with a blue icon), and "Product & Pricing" (with a blue icon). An "Audit Log" link is also visible.


Below the menu is a "Misc" dropdown menu set to "2".

The main part of the interface is a table with the following columns: "UPLOADED DOC", "STATUS", "NAME", "DESCRIPTION", and "ACTION".

UPLOADED DOC	STATUS	NAME	DESCRIPTION	ACTION
	Nov 16 14:58	Borrower's Authorization	Please eSign the following document	
	Nov 3 7:41	Federal Tax Returns - Last 2 Years	Most recent 2 years of federal tax returns, including all schedules	

At the bottom of the page, there is a footer with the text "Earn Extra Cash by Referring Flofty" and a "Help | Developer Docs" link.

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*:

Borrower's Authorization Add Signature 

2 action items left to complete Cancel & Sign

Flōify


Flōify Mortgage Group
Boulder, CO 80302

By signing below, I agree to give authorization to run a credit check on financial history and hereby grant permission for **Flōify Mortgage Group** to obtain all information deemed necessary to process my mortgage loan application. This information includes, but is not limited to, my past and present employment status, my deposit accounts, my past and present consumer credit record, my mortgage record, and/or my rental record.

_____ (signature) _____ (signature)

_____ (date) _____ (date)

Flōify Mortgage Group
Boulder, CO 80302
Lender: Eric Dutil

 Click to sign _____ (signature)

Click to date _____ (date)

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

Borrower's Authorization Edit Signature X

All action items complete

Flōify Floify Mortgage Group
Boulder, CO 80302

By signing below, I agree to give authorization to run a credit check on financial history and hereby grant permission for **Floify Mortgage Group** to obtain all information deemed necessary to process my mortgage loan application. This information includes, but is not limited to, my past and present employment status, my deposit accounts, my past and present consumer credit record, my mortgage record, and/or my rental record.

_____ (signature) _____ (signature)

_____ (date) _____ (date)

Floify Mortgage Group
Boulder, CO 80302
Lender: Eric Dutil

Eric Dutil (signature)

11/7/20 (date)

Confirm & Sign

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

Betty Borrower Flow – Borrower - Purchase

Deadline 3 days [Progress Bar]

Loan Type: Conventional

Docs Owed | Docs Pending Review | Docs Accepted | Add New Doc | Stack & Send Docs | Add Training | Pre-Approval Letter | Product & Pricing

UPLOADED DOC	STATUS	NAME	DESCRIPTION	ACTION
	Nov 16 14:58	Borrower's Authorization	Please eSign the following document	[eSign] [Download] [Trash]
	Nov 3 7:41	Federal Tax Returns - Last 2 Years	Most recent 2 years of federal tax returns, including all schedules	[eSign] [Download] [Trash]

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

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