

Realtors and Partners Guide

Overview


There are a variety of features available within Floify for you to integrate your realtors and partners into the loan flow process along with your borrowers seamlessly including adding realtors and partners to your database, editing realtor and partner contact information, inviting realtors and partners to a loan flow, and setting up realtor and partner co-branding.

This help article provides a tutorial on how to use the realtor and partner features mentioned above.

How to Setup and Use

Add a Realtor or Partner

From your loan pipeline, navigate to **Settings** and select the **Realtors, Partners** tab:



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[eric@floify.com](#)
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Settings

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

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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. *Import your realtors by sending your file to support@floify.com.*

[Invite Realtor or Partner](#)

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Rhonda Realtor	rhonda@example.com	5555555555		Edit Delete View
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		Edit Delete View
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	Edit Delete View
Colleen Summers	colleensummersrealty@example.com	720-555-9988		Edit Delete View Eye
Tommy Title	titelandservices@example.com			Edit Delete View
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	Edit Delete View

Showing 1 to 6 of 6 partners

[Pre-Approval Letter Template](#)

Select the plus sign next to **Invite Realtor or Partner** on the right hand side:



Settings

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

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Realtors, Partners

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Integrations

Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. **Import your realtors by sending your file to support@floify.com.**

Invite Realtor or Partner

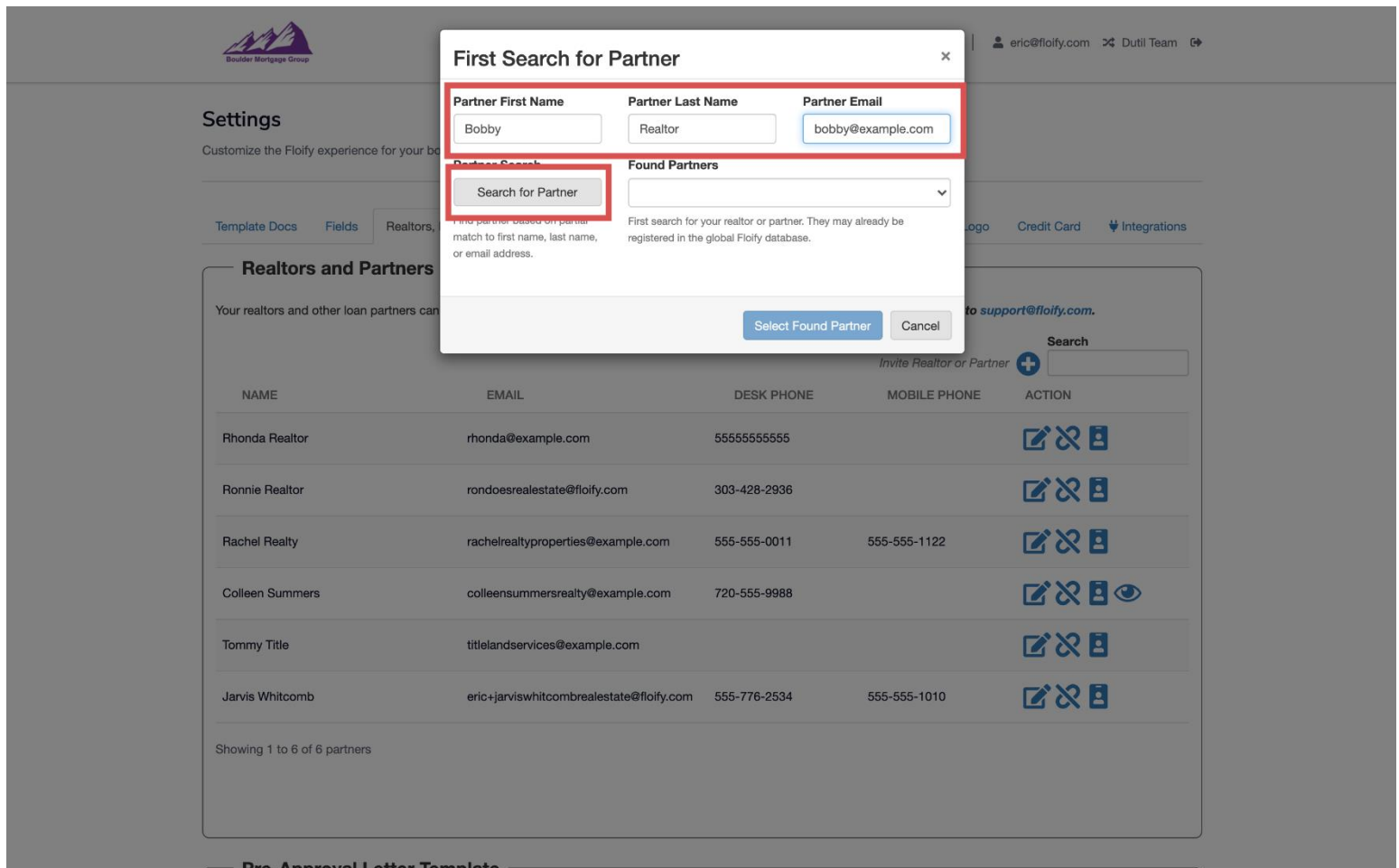
Search

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Rhonda Realtor	rhonda@example.com	5555555555		<div><div></div><div></div><div></div></div>
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		<div><div></div><div></div><div></div></div>
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	<div><div></div><div></div><div></div></div>
Colleen Summers	colleensummersrealty@example.com	720-555-9988		<div><div></div><div></div><div></div><div></div></div>
Tommy Title	titlelandservices@example.com			<div><div></div><div></div><div></div></div>
Jarvis Whitcomb	eric+jarviswhitcomb@realestate@floify.com	555-776-2534	555-555-1010	<div><div></div><div></div><div></div></div>

Showing 1 to 6 of 6 partners

Pre-Approval Letter Template

Enter the Partner First Name, Partner Last Name, and/or Partner Email. Select the **Search for Partner** button to prompt any existing account results:



First Search for Partner

Partner First Name: Bobby

Partner Last Name: Realtor

Partner Email: bobby@example.com

Search for Partner

Found Partners




















No partner based on partial match to first name, last name, or email address.

First search for your realtor or partner. They may already be registered in the global Floify database.

Select Found Partner Cancel

Realtors and Partners

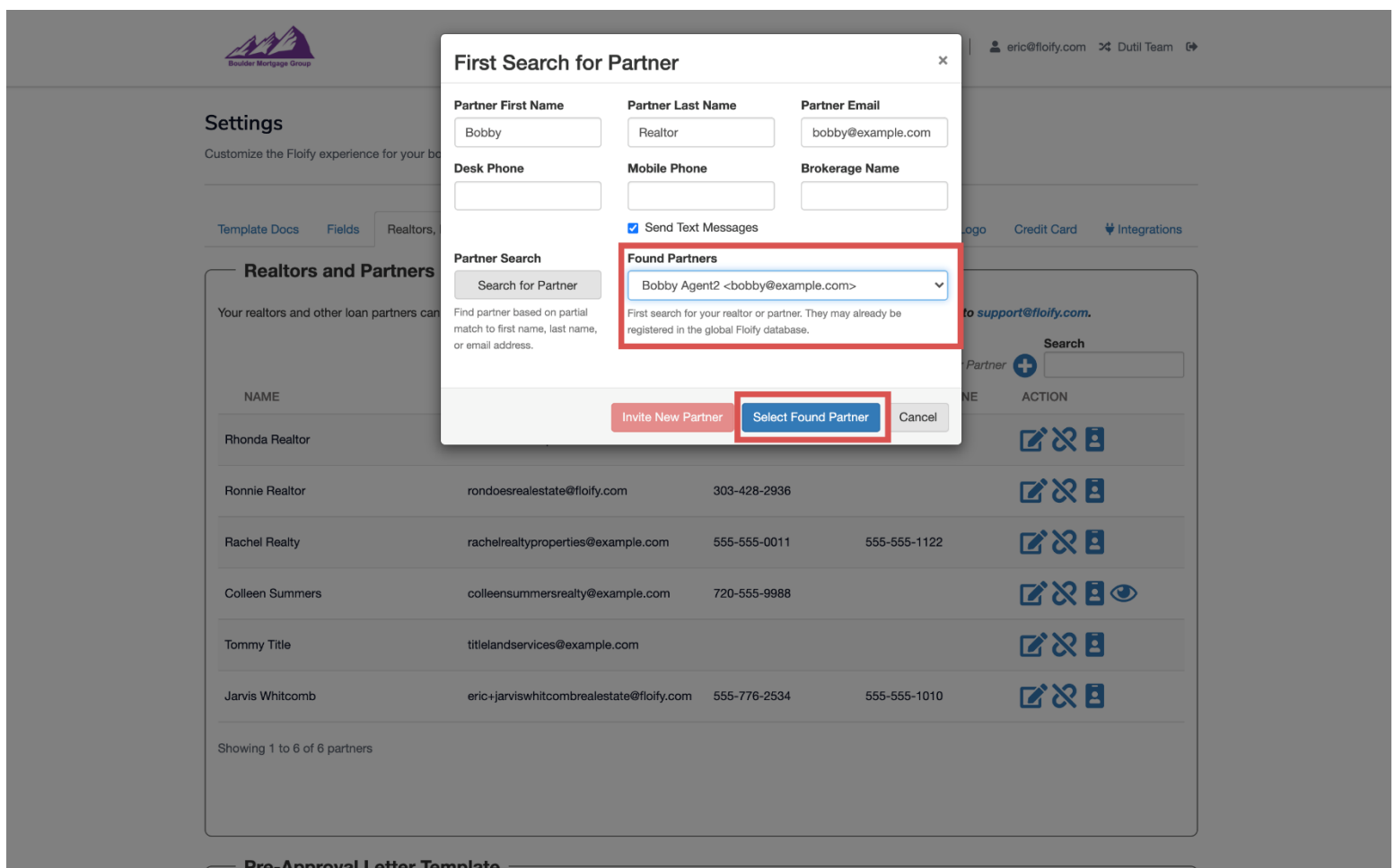
Your realtors and other loan partners can be found here.

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Rhonda Realtor	rhonda@example.com	5555555555		  
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		  
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	  
Colleen Summers	colleensummersrealty@example.com	720-555-9988		   
Tommy Title	titlelandservices@example.com			  
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	  

Showing 1 to 6 of 6 partners

Pre-Approval Letter Template

Any found partners will populate in the **Found Partners** dropdown. These are users that already have a registered account in the global Floify database. If you find the realtor or partner listed here, select the result and then **Select Found Partner** to finish adding them:



The screenshot shows the 'First Search for Partner' modal and the 'Realtors and Partners' table in the Floify interface.

First Search for Partner Modal:

- Partner First Name:** Bobby
- Partner Last Name:** Realtor
- Partner Email:** bobby@example.com
- Desk Phone:** (empty)
- Mobile Phone:** (empty)
- Brokerage Name:** (empty)
- ☒ Send Text Messages
- Partner Search:** Search for Partner
- Found Partners:** Bobby Agent2 <bobby@example.com>
- Buttons:** Invite New Partner, Select Found Partner, Cancel

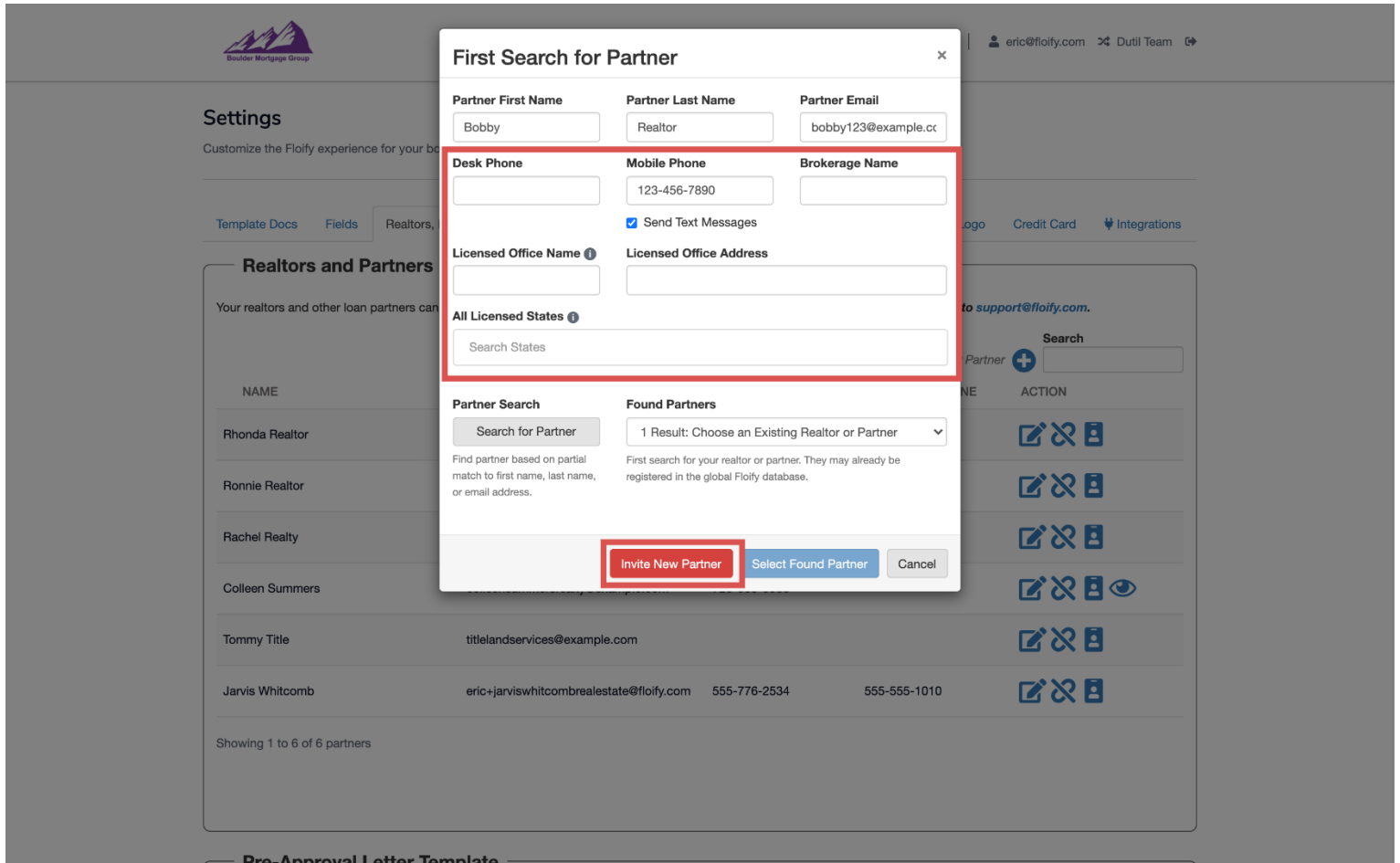
Realtors and Partners Table:

NAME	First Name	Last Name	Phone	Email	Actions
Rhonda Realtor	Rhonda	Realtor			[Edit] [Delete] [Add]
Ronnie Realtor	Ronnie	Realtor	303-428-2936	rondoesrealestate@floify.com	[Edit] [Delete] [Add]
Rachel Realty	Rachel	Realty	555-555-0011	rachelrealtyproperties@example.com	[Edit] [Delete] [Add]
Colleen Summers	Colleen	Summers	720-555-9988	colleensummersrealty@example.com	[Edit] [Delete] [Add] [View]
Tommy Title	Tommy	Title		titlelandservices@example.com	[Edit] [Delete] [Add]
Jarvis Whitcomb	Jarvis	Whitcomb	555-776-2534	eric+jarviswhitcombrealstate@floify.com	[Edit] [Delete] [Add]

Showing 1 to 6 of 6 partners

If your realtor or partner doesn't have an existing Floify account, you will be able to enter any additional details for their account including Desk Phone, Mobile Phone,

Brokerage Name, Licensed Office Name, Licensed Office Address, and Licensed States. Select ***Invite New Partner*** to create their account and finish adding them:



First Search for Partner

Partner First Name: Bobby
 Partner Last Name: Realtor
 Partner Email: bobby123@example.cc

Desk Phone:
 Mobile Phone: 123-456-7890
 Brokerage Name:

☒ Send Text Messages

Licensed Office Name:
 Licensed Office Address:


All Licensed States:

Partner Search: Search for Partner
 Found Partners: 1 Result: Choose an Existing Realtor or Partner

Find partner based on partial match to first name, last name, or email address.
 First search for your realtor or partner. They may already be registered in the global Floify database.

Invite New Partner Select Found Partner Cancel

Any realtors or partners you've added into your account will be listed here for review. You can search using the search bar on the right hand side as well:



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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. *Import your realtors by sending your file to support@floify.com.*


[Invite Realtor or Partner](#)

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Bobby Realtor	bobby123@example.com		123-456-7890	Edit Delete View
Rhonda Realtor	rhonda@example.com	5555555555		Edit Delete View
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		Edit Delete View
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	Edit Delete View
Colleen Summers	colleensummersrealty@example.com	720-555-9988		Edit Delete View Eye
Tommy Title	titelandservices@example.com			Edit Delete View
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	Edit Delete View

Showing 1 to 7 of 7 partners

Edit a Realtor or Partner

From your loan pipeline, navigate to **Settings** and select the **Realtors, Partners** tab:



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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. *Import your realtors by sending your file to support@floify.com.*

Invite Realtor or Partner

+

Search

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Rhonda Realtor	rhonda@example.com	5555555555		Edit Delete Profile
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		Edit Delete Profile
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	Edit Delete Profile
Colleen Summers	colleensummersrealty@example.com	720-555-9988		Edit Delete Profile View
Tommy Title	titlelandservices@example.com			Edit Delete Profile
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	Edit Delete Profile

Showing 1 to 6 of 6 partners

[Pre-Approval Letter Template](#)

Select the pencil/paper icon towards the right hand side of the realtor or partner's name:



Home Prospects 2 Integrations Settings Users Audit Log | [eric@floify.com](#) [Dutil 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

Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. **Import your realtors by sending your file to support@floify.com.**

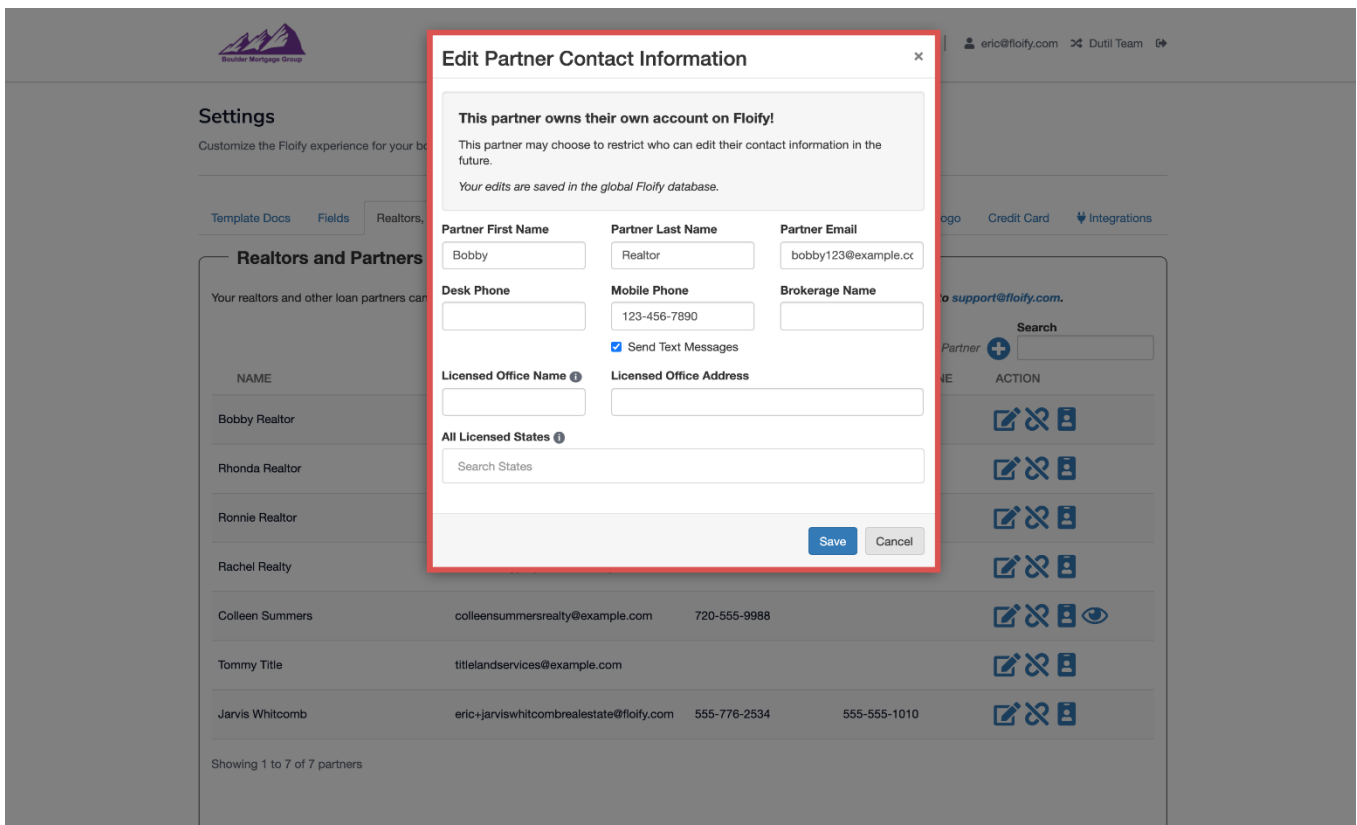
Invite Realtor or Partner +

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Bobby Realtor	bobby123@example.com		123-456-7890	  
Rhonda Realtor	rhonda@example.com	5555555555		  
Ronnie Realtor	rondoesrealstate@floify.com	303-428-2936		  
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	  
Colleen Summers	colleensummersrealty@example.com	720-555-9988		   
Tommy Title	titlelandservices@example.com			  
Jarvis Whitcomb	eric-jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	  

Showing 1 to 7 of 7 partners

Make any adjustments you need to the contact and select **Save** to confirm the changes:

Note: Realtors/partners can restrict who can edit their contact information in their own profile, so you may not have access to make adjustments if this is the case.



Edit Partner Contact Information

This partner owns their own account on Floify!
This partner may choose to restrict who can edit their contact information in the future.
Your edits are saved in the global Floify database.

Partner First Name: Bobby
Partner Last Name: Realtor
Partner Email: bobby123@example.cc























Desk Phone:
Mobile Phone: 123-456-7890
Brokerage Name:
☒ Send Text Messages

Licensed Office Name:
Licensed Office Address:
All Licensed States: Search States

Save Cancel

Realtors and Partners

Your realtors and other loan partners can

NAME	EMAIL	PHONE	ACTION
Bobby Realtor			  
Rhonda Realtor			  
Ronnie Realtor			  
Rachel Realty			  
Colleen Summers	colleensummersrealty@example.com	720-555-9988	   
Tommy Title	titlelandservices@example.com		  
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534 555-555-1010	  

Showing 1 to 7 of 7 partners

You can also unlink a realtor or partner from your account if you need to with the chain link icon towards the right hand side of the realtor or partner's name:



Settings

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

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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. **Import your realtors by sending your file to support@floify.com.**


				Search
				+ Invite Realtor or Partner
NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Bobby Realtor	bobby123@example.com		123-456-7890	✕ 🔗 👤
Rhonda Realtor	rhonda@example.com	5555555555		✕ 🔗 👤
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		✕ 🔗 👤
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	✕ 🔗 👤
Colleen Summers	colleensummersrealty@example.com	720-555-9988		✕ 🔗 👤 👁
Tommy Title	titlelandservices@example.com			✕ 🔗 👤
Jarvis Whitcomb	eric-jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010	✕ 🔗 👤

Showing 1 to 7 of 7 partners

<https://app.floify.com/settings#myDeleteRealtorModal>

Invite a Realtor or Partner to a Loan Flow

From the loan pipeline, select the **Edit Loan Flow** icon:


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

Loan Pipeline

Interact with your borrowers









+ Start New Loan Flow
19 Docs Pending Review

Filter by Loan Owner

Everyone


3 PENDING ADD DOCUMENT NOTICES

Active Loans Docs Pending Review (19) Docs Awaiting Your Signature Archived Pipeline Status

FLOW	BORROWER	CO-BORROWER	MILESTONE	STATUS	FLOW OWNER	ACTION
# 3 0 4	Ida Borrower		Contract Received	3 owed 7d	Eric Dutil	
# 3 5 0	Robert Borrower		Contract Received	3 owed 8d	Eric Dutil	
# 1 0 10	Billy Borrower		Appraisal Ordered	1 owed 7d	Eric Dutil	
# 3 0 5	Jane Homebuyer		Contract Received	3 owed 91d	Eric Dutil	
# 10 2 4	Betty Borrower	Cathy Co-borrower	Appraisal Received	10 owed 21d	Eric Dutil	
# 6 0 4	George Smith		Pre-Approval	6 owed 42d	Eric Dutil	
# 5 1 0	Joe Christmas			5 owed 13d	Eric Dutil	
# 1 0 2	Laura Wilson		Pre-Qualification	1 owed 5d	Eric Dutil	

<https://app.floify.com/#editLoan>

Scroll down to the **Realtors and Partners** section. You will see a list of all the realtors and partners in your account listed here. You can also use the search bar on the right to find a specific name:



Loan Pipeline
Interact with your b

+ Start New Lo

Active Loans

FLOW

9 0 4

3 5 0

1 0 10

3 0 5

10 2 4

6 0 4

5 1 0

1 0 2

Send New Messages to Co-Borrower

Realtors and Partners

? Realtors and Partners, if granted *Makes Letters* permission, can generate pre-approval letters or state-specific forms anytime in their Floify.

Q Search for Realtors and Partners ✓ Selected Realtors and Partners

Search

<input type="checkbox"/> SELECT	PARTNER NAME	MAKES LETTERS	EMAIL	DESK PHONE	MOBILE PHONE
<input type="checkbox"/>	Bobby Realtor	<input type="checkbox"/>	bobby123@example.com		123-456-7890
<input type="checkbox"/>	Rhonda Realtor	<input type="checkbox"/>	rhonda@example.com	5555555555	
<input type="checkbox"/>	Ronnie Realtor	<input type="checkbox"/>	rondoesrealestate@floify.com	303-428-2936	
<input type="checkbox"/>	Rachel Realty	<input type="checkbox"/>	rachelrealtyproperties@example.com	555-555-0011	555-555-1122
<input type="checkbox"/>	Colleen Summers	<input type="checkbox"/>	colleensummersrealty@example.com	720-555-9988	
<input type="checkbox"/>	Tommy Title	<input type="checkbox"/>	titelandservices@example.com		
<input type="checkbox"/>	Jarvis Whitcomb	<input type="checkbox"/>	eric-jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010

Showing 1 to 7 of 7 partners


☒ Yes, prepare Arizona forms for this loan

Prepare Pre-Approval Letter

Maximum Sales Price	Loan Type	Max Seller Paid Costs
\$ 300000	FHA	\$ 8000

Dutil Team

Select the checkbox on the left hand side of the realtor or partner's name to invite them into the loan flow for this borrower. This will give them basic permissions including access to the milestone updates and the option to upload documents to you directly:



Loan Pipeline
Interact with your b

+ Start New Lo

Active Loans

FLOW

9 0 4

9 8 0

1 0 10

9 0 5

10 2 4

6 0 4

6 1 0

1 0 2

Loan not assigned to Co-Borrower

Realtors and Partners

? Realtors and Partners, if granted *Makes Letters* permission, can generate pre-approval letters or state-specific forms anytime in their Floify.

Q Search for Realtors and Partners Selected Realtors and Partners

Search

<input type="checkbox"/> SELECT	PARTNER NAME	MAKES LETTERS	EMAIL	DESK PHONE	MOBILE PHONE
<input checked="" type="checkbox"/>	Bobby Realtor	<input type="checkbox"/>	bobby123@example.com		123-456-7890
<input type="checkbox"/>	Rhonda Realtor	<input type="checkbox"/>	rhonda@example.com	5555555555	
<input type="checkbox"/>	Ronnie Realtor	<input type="checkbox"/>	rondoesrealestate@floify.com	303-428-2936	
<input type="checkbox"/>	Rachel Realty	<input type="checkbox"/>	rachelrealtyproperties@example.com	555-555-0011	555-555-1122
<input type="checkbox"/>	Colleen Summers	<input type="checkbox"/>	colleensummersrealty@example.com	720-555-9988	
<input type="checkbox"/>	Tommy Title	<input type="checkbox"/>	titlelandservices@example.com		
<input type="checkbox"/>	Jarvis Whitcomb	<input type="checkbox"/>	eric-jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010

Showing 1 to 7 of 7 partners


☒ Yes, prepare Arizona forms for this loan

Prepare Pre-Approval Letter

Maximum Sales Price	Loan Type	Max Seller Paid Costs
\$ 300000	FHA	\$ 8000

Dutil Team

Select the checkbox in the **Makes Letters** column to allow your realtor or partner to generate a pre-approval letter in their portal in addition to the basic permissions:



Loan Pipeline
Interact with your b

+ Start New Loan

Active Loans

IF FLOW

3 0 4

3 0 0

1 0 10

3 0 5

10 2 4

6 0 4

6 1 0

1 0 2

JOIN REAL PROPERTIES IN Co-Borrower

Realtors and Partners

? Realtors and Partners, if granted **Makes Letters** permission, can generate pre-approval letters or state-specific forms anytime in their Floify.

Search for Realtors and Partners Selected Realtors and Partners

Search

SELECT	PARTNER NAME	MAKES LETTERS	EMAIL	DESK PHONE	MOBILE PHONE
<input checked="" type="checkbox"/>	Bobby Realtor	<input checked="" type="checkbox"/>	bobby123@example.com		123-456-7890
<input type="checkbox"/>	Rhonda Realtor	<input type="checkbox"/>	rhonda@example.com	555-555-5555	
<input type="checkbox"/>	Ronnie Realtor	<input type="checkbox"/>	rondoesrealestate@floify.com	303-428-2936	
<input type="checkbox"/>	Rachel Realty	<input type="checkbox"/>	rachelrealtyproperties@example.com	555-555-0011	555-555-1122
<input type="checkbox"/>	Colleen Summers	<input type="checkbox"/>	colleensummersrealty@example.com	720-555-9988	
<input type="checkbox"/>	Tommy Title	<input type="checkbox"/>	titelandservices@example.com		
<input type="checkbox"/>	Jarvis Whitcomb	<input type="checkbox"/>	eric-jarviswhitcombrealstate@floify.com	555-776-2534	555-555-1010

Showing 1 to 7 of 7 partners


☒ Yes, prepare Arizona forms for this loan

Prepare Pre-Approval Letter

Maximum Sales Price	Loan Type	Max Seller Paid Costs
\$ 300000	FHA	\$ 8000

Dutil Team

Make sure you select **Save** at the bottom of the page to confirm the changes:



Loan Pipeline

Interact with your b

+ Start New Loan

Active Loans

FLOW

- # 3 0 4
- # 3 0 0
- # 1 0 10
- # 3 0 5
- # 10 2 4
- # 6 0 4
- # 5 1 0
- # 1 0 2

☒ Yes, prepare Arizona forms for this loan

Prepare Pre-Approval Letter

Maximum Sales Price

\$ 300000

125000, 250000, 417000, etc

Loan Type

FHA

FHA, VA, Conventional, etc

Max Seller Paid Costs

\$ 8000

Maximum Seller Paid Closing Costs: 1250, 2500, 4170, etc

☐ \$ ☐ % Set down payment limits using \$ (dollars) or % (percentage). Only one is used.

\$ Minimum Down Payment

\$ 0

25000, 50000, 86400, etc

\$ Down Payment

\$0 - \$20000

\$ Maximum Down Payment

\$ 20000

25000, 50000, 86400, etc

% Minimum Down Payment

% Down Payment


% Maximum Down Payment

Personal Note

Any additional notes to appear on the pre-approval letter

Personal Note will appear on the generated pre-approval letter

☐ Yes, move this loan flow to a different team



Save

Cancel

Laura Wilson


Pre-Qualification

1 owed

Eric Dutil

Set Up Realtor/Partner Co-Branding

From your loan pipeline, navigate to **Settings** and select the **Team Info** tab:



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Team Info

SETTING	VALUE
Long Team Name	Boulder Mortgage Group
Short Team Name	Dutil Team
Website Sub-Domain	bouldermortgagegroup.floify.com
Enable White Labeling for Team	Not Enabled

[Edit Team Info](#)


Licenses

ISSUER	LICENSE
No licenses added yet.	

[Edit Licenses](#)

Your Progressive Web App

Borrowers can install your web app on their phones without going through the Apple and Google stores.

[Edit Progressive Web App](#)


Scroll down to **Landing Page Configuration** and select the option to **Edit Landing Page Configuration**:

Simple Installation

Borrowers can install their App on your phone.

Team Smith at Key Mortgage

Get your App Now! (Go to the App Store)

Login

Email Address

Password

Forgot Password

Get the App

Easily Accessible

With your App installed, your Apply Now is just one finger-tap away.

Share Your App

Send your App to realtors and borrowers by texting your unique Floify web address.

Landing Page Configuration

Customize your default landing page with your team photo.

Landing Page Preview	bouldermortgagegroup.floify.com?preview=true
Realtor and Partner Co-Branding	Enabled
Landing Page Calculators	Enabled
Landing Page Email Notifications	Manage
Edit Landing Page Configuration	

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[Help](#)

Headline

Restore Default Text

Welcome to Boulder Mortgage Group

Landing Page Image



Realtor and Partner Co-Branding

☒ Enable Realtor and Partner Co-Branding

By enabling the checkbox, you allow realtor and partner co-branding on your landing page. You can enable and modify individual realtor/partner co-branding settings in Team Settings > Realtors and Partners.

Landing Page Calculators

☒ Enable Landing Page Calculators

By checking this box, you can include a mortgage calculator, refinance calculator, and/or debt-to-income calculator on your landing page.

☒ Mortgage Calculator

☒ Refinance Calculator

☒ Debt-to-Income Calculator

☒ Enable Lead Generation Dialog for Accessing Calculators

Checking this box will turn on a Landing Page Calculator lead generation dialog. Check the boxes below to make specific inputs required in order to access the calculators. Lead generation details will be forwarded to the team upon submission.

☒ Require Name


☒ Require Email Address

☒ Require Phone Number

Save

Cancel

Navigate to **Realtors, Partners** and select the **Edit Co-branding Settings** icon towards the right of the realtor/partner's name:



[Home](#)
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[Apps](#)
[Settings](#)
[Users](#)
[Info](#)

[eric@floify.com](#)
[Dutil Team](#)

Settings

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

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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Floify. **Import your realtors by sending your file to support@floify.com.**

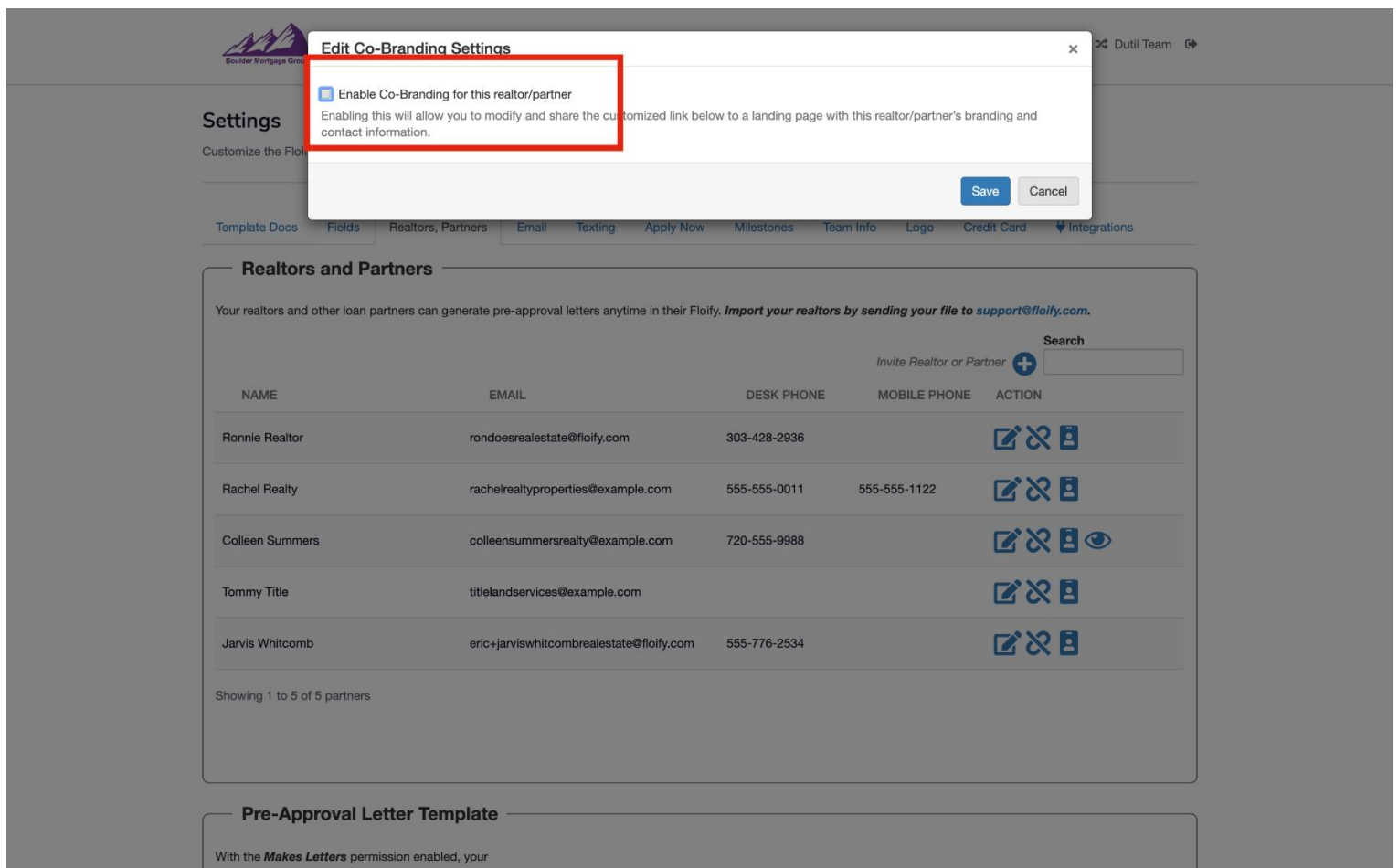
[Invite Realtor or Partner](#)

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		Edit Delete Co-branding Settings
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	Edit Delete Co-branding Settings
Colleen Summers	colleensummersrealty@example.com	720-555-9988		Edit Delete Co-branding Settings View
Tommy Title	titlelandservices@example.com			Edit Delete Co-branding Settings
Jarvis Whitcomb	eric+jarviswhitcombreaalestate@floify.com	555-776-2534		Edit Delete Co-branding Settings

Showing 1 to 5 of 5 partners

















Pre-Approval Letter Template

Click the icon and a modal will appear. Check the box to ***Enable Co-Branding for this realtor/partner:***



The screenshot shows the 'Settings' page for 'Boulder Mortgage Group' in the Floify system. A modal titled 'Edit Co-Branding Settings' is open, with a red box highlighting the 'Enable Co-Branding for this realtor/partner' checkbox and its description: 'Enabling this will allow you to modify and share the customized link below to a landing page with this realtor/partner's branding and contact information.' The modal has 'Save' and 'Cancel' buttons.

The background interface shows the 'Realtors and Partners' section. It includes a search bar, an 'Invite Realtor or Partner' button, and a table of existing partners.

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Ronnie Realtor	rondoesrealestate@floify.com	303-428-2936		  
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	  
Colleen Summers	colleensummersrealty@example.com	720-555-9988		   
Tommy Title	titlelandservices@example.com			  
Jarvis Whitcomb	eric+jarviswhitcombrealstate@floify.com	555-776-2534		  

Showing 1 to 5 of 5 partners

The 'Pre-Approval Letter Template' section is partially visible at the bottom, starting with the text: 'With the **Makes Letters** permission enabled, your

Additional information can be entered for the partner, including their photo and an option to customize the shareable URL:

The screenshot shows a web application interface with a modal dialog titled "Edit Co-Branding Settings". The background is a "Settings" page for "Boulder Mortgage Group".

Settings
Customize the Flow

Template Docs

Realtor
Your realtors and

NAME
Ronnie Realtor
Rachel Realty
Colleen Summe
Tommy Title

Jarvis Whitcomb eric+jarviswhitcomb@realestate@floify.com 555-776-2534

Showing 1 to 5 of 5 partners

Pre-Approval Letter Template
With the **Makes Letters** permission enabled, your

Edit Co-Branding Settings


☒ Enable Co-Branding for this realtor/partner
Enabling this will allow you to modify and share the customized link below to a landing page with this realtor/partner's branding and contact information.

Co-branding Link
https://bouldermortgagegroup.floify.com/r/ colleen-summers-1

Realtor/Partner Image

Save **Cancel**

Save the settings. A new preview icon for the partner will appear (this icon will display for any partner that has co-branding enabled):



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Settings

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

















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Realtors and Partners

Your realtors and other loan partners can generate pre-approval letters anytime in their Fioify. *Import your realtors by sending your file to support@fioify.com.*

Invite Realtor or Partner

Search

NAME	EMAIL	DESK PHONE	MOBILE PHONE	ACTION
Ronnie Realtor	rondoesrealestate@fioify.com	303-428-2936		  
Rachel Realty	rachelrealtyproperties@example.com	555-555-0011	555-555-1122	  
Colleen Summers	colleensummersrealty@example.com	720-555-9988		   
Tommy Title	titleandservices@example.com			  
Jarvis Whitcomb	eric+jarviswhitcombrealstate@fioify.com	555-776-2534		  

Showing 1 to 5 of 5 partners

Pre-Approval Letter Template

With the **Makes Letters** permission enabled, your

Click the icon to view the co-branded page:



Share this page

Apply Now

Log In

Welcome to Boulder Mortgage Group

Beginning the loan application process? You're in the right place! Get started by setting up an account.



Eric Dutil
Floify Mortgage Group

Company: NMLS #1234567
Lender: NMLS #999999

Desk: (720) 316-8343
Mobile: +1 (720) 316-8343
eric@floify.com

OUR PARTNER



Colleen Summers

Desk: (720) 555-9988
colleensummersrealty@example.com

Mortgage

Refinance

Debt-to-Income

Mortgage Calculator

Estimate your mortgage payment with taxes, insurance, and HOA. Just enter the price of the home, your down payment, and loan details to calculate your estimated payments and schedule!

Home Price

Down Payment %

Loan Program 

Interest Rate %

[Show Advanced Options](#)

Your Payment **\$1,065** / mo



☒ \$846.94 Principal + Interest
 ☒ \$148.33 Taxes
 ☒ \$70.00 Insurance