INTRODUCTION TO CUSTOM FIELDS AND BUSINESS RULES

Floify has built-in fields as well as custom fields, which make it easy for you to store custom data in Floify and surface that data where you like in the Floify user interface using business rules.

Use cases include:

- Informing borrowers when and where the closing is.
- Lightweight CRM that lets you focus on your "hot" borrowers and when the next time you need to followup with them.
- Tasks for your LO team depending on the loan program. For example, FHA Conventional guidelines may call for one set of tasks but a VA loan may call for a different set of tasks.
- So many other use cases are possible.

Every built-in and custom field includes:

- a Field Label, which is a human-friendly name for the field
- a Field Name, which contains no whitespace but is usually very similar to the Field Label

The Field Name uniquely identifies the field and is case-insensitive.

All data, including files, is encrypted in transit and at rest. This feature can be disabled at the Company Dashboard level.