

API DOCUMENTATION

Floify REST API

These endpoints are used to perform popular operations within Floify. For an easy introduction to Floify coding, start with the `ping` endpoint.

Each company or organization (individuals are considered an "organization of one") must register as a Developer with Floify. Start by browsing to floify.com/partners.

Once you've registered as a Developer, you can register your Integration. Upon logging in, click on your team name in the upper right hand corner and select Company Dashboard. Go to *Company Settings > Developer > Create Integration*. Each approved Integration receives a unique, secret **Integration API Key**, which can be found at *Integration Settings > Get API Key*.

Your API Integration Key can be used to access the Floify endpoints described below.

Your unique, secret Floify Integration API Key is passed as an HTTP header on every call, like so:

```
X-API-KEY: YOUR-INTEGRATION-API-KEY-ISSUED-BY-FLOIFY-GOES-HERE
```

Do not share API keys. They are secret and can expose personally identifiable information to the wrong parties if they are shared inappropriately.

Rate Limiting

To ensure fair usage and maintain optimal performance across all clients, Floify APIs are subject to rate limiting.

- **Usage Limit:** Up to 10 requests per second per client.

- **Shared Infrastructure:** Floify API rate limits are shared across all customers.
- Please be considerate of usage to prevent service disruptions to others. Clients exceeding these limits may experience throttling or temporary access restrictions.

SIMPLE EXAMPLE

To test out a simple example, run this [cURL](#) command from the command line or a shell prompt:

```
$ curl -H "X-API-KEY: YOUR-INTEGRATION-API-KEY-ISSUED-BY-FLOIFY-GOES-HERE" https://api.floify.com/v2019-11/ping
```

You should see the following JSON success message returned:

```
{ "success": "Successful ping" }
```

If the X-API-KEY header is missing or contains an invalid API key, you'll see the following JSON error message:

```
{ "error": "Missing or invalid Floify Integration API Key" }
```

USER API KEY

Most API endpoints require a User API Key, which specifies a user in Floify on whose behalf the API call operates. The `ping` endpoint does not, since it does not function on behalf of any user in Floify.

User API Keys are available on each user's Profile page. (Borrowers and Realtors do not have API keys.)

To pass in a User API Key, set an HTTP header called "Authorization" to the value "Bearer <User API Key>". For example:

```
Authorization: Bearer 3JS8J3L2JLJ2J2L323LLSX
```

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.

A [complete overview of Floify Custom Fields](#) is available.

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.
- Calling webhooks when business rules are fired.
- 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 is used in these API endpoints.

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

The endpoints below provide ways for you to write and read data from built-in and custom data fields.

[Terms of service](#)

[Floify Developer Portal \(detailed documentation\)](#)

<https://api.floify.com/v2019-11> - Production server (uses live data)

 Authorize
 

Fundamentals



GET

/ping Tests connectivity to the Floify service.



GET

/prospects Returns all prospects.



POST

/prospects
Creates a new incomplete or fully-completed prospect. Depending on user settings, a corresponding loan flow and Encompass loan file can be created automatically.



GET

/prospects
/{prospect-id} Returns all metadata for the prospect associated with the provided Floify prospect ID.



POST

/prospects
/{prospect-id}
/invite Invites borrowers to the loan application associated with the provided Floify prospect ID.



POST

/start Starts a new loan flow.



POST

/doc-requests/{loan-id} Adds doc requests to a loan flow.



GET

/download/{loan-id}
/{document} Downloads a document associated with a Floify loan ID.
















GET




/download-1003/{loan-id} If a 1003 exists on a loan flow, downloads the associated Fannie Mae 1003 loan application from a loan flow as a JSON string, either in the MISMO 3.4 JSON schema or Fannie Mae 3.2 JSON schema. A query parameter "format" specifies which format is used.




/download-1003- If a 1003 exists on a loan flow, downloads the associated Fannie Mae 1003 loan application from a loan flow as either a MISMO 3.4





GET	file /{loan-id}	XML file or a Fannie Mae 3.2 data file, depending on the query parameter "format".	
POST	/upload-1003 /{loan-id}	Uploads a Fannie Mae 1003 loan application to a loan flow using a JSON string.	
POST	/upload-1003-file /{loan-id}	Uploads a Fannie Mae 1003 loan application to a loan flow using a JSON file.	
GET	/flows	Returns all loan flows.	
GET	/flows /{loan-id}	Returns all metadata for the loan flow associated with the provided Floify loan ID.	
GET	/flows/{loan-id} /applications	Gets the list of all borrower pairs (co-mortgagors) for the specified loan.	
GET	/flows/{loan-id}/applications /{borrower-pair-id}	Gets the the specified borrower pair for the specified loan.	
POST	/flows/{loan-id} /invite	Invites borrowers to the loan flow associated with the provided Floify loan ID.	
POST	/flows/{loan-id} /archive	Archives the loan flow associated with the provided Floify loan ID.	
POST	/flows/{loan-id} /unarchive	Unarchives the loan flow associated with the provided Floify loan ID.	
POST	/milestone-update/{loan-id}	Checks off a milestone on a loan flow.	
GET	/loan-metadata /{loan-id}	Returns all metadata for the loan flow associated with the provided Floify loan ID.	
POST	/loan-metadata /{Loan-id}	Updates metadata for the loan flow associated with the provided Floify loan ID.	
POST	/upload /{loan-id}	Uploads documents in response to one existing document request, associated with a Floify loan ID.	


POST	/upload-oneoff/{loan-id}	Uploads documents in response to one existing document request, associated with a Floify loan ID.	
GET	/loan-pre-approval-data	Returns pre-approval letter data for given floify loan ID or LOS loan file number and realtor email	
POST	/generate-pre-approval-letter	Generate pre-approval letter for the given Floify loan ID.	




Custom Fields & 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. 

GET	/field/read/{object-type}/{object-id}/{field-name}	Reads custom and built-in data field values.	
POST	/field/write/{object-type}/{object-id}	Writes values custom fields.	




Floify Webhooks

You cannot call these endpoints. These are definitions of webhooks that Floify calls in **your** software system. You can use business rules in Floify to call any webhook on the internet. 


POST	/app/application-start-webhook	Notifications when new loan applications are created can be delivered to you via webhook. This webhook is supported for Floify Integrations and CRM Integrations.	
POST	/app/idle-prospect-webhook	Notifications when prospects become idle can be delivered to you via webhook. This webhook is supported for Floify Integrations and CRM Integrations.	
	/app/prospect-loan-start-		

POST	webhook	Notifications when new prospects are created or loans are started can be delivered to you via webhook.	
POST	/app /milestone- webhook	Notifications when milestones are checked off or otherwise changed can be delivered to you via webhook.	
POST	/app /mail- webhook	Notifications when mail is sent regarding a loan flow anywhere within your company (Needs List mail, notices, and milestone updates) can be delivered to you via webhook.	
POST	/app /sms- webhook	Notifications when SMS text messages are sent regarding a loan flow anywhere within your company (Needs List mail, notices, milestone updates, and real estate agent notifications) can be delivered to you via webhook.	
POST	/app/doc- webhook	Notifications when a doc is uploaded or deleted can be delivered to you via webhook.	

Mobile App Support For use only by developers creating mobile iOS and Android apps.

POST	/login	Accepts a valid email address and password security credentials and returns an API token for use with other endpoints.	
POST	/device- register	Associates a mobile device's device token with an API token obtained from a previous call to /login. An API token (also called an API key) can have many device tokens associated with it.	
POST	/device- unregister	Unregisters a device token from an API token previously obtained from the /login endpoint. An API token (also called an API key) can have many device tokens associated with it.	

For eSignature Partners Only

POST	/partner /docmagic	Webhook delivery endpoint for new DocMagic disclosure packages that are ready to be eSigned	
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POST

/partner
/ids

Webhook delivery endpoint for new IDS disclosure packages that
are ready to be eSigned

