

FLOIFY INTEGRATION REVIEW PROCESS

Before your visual Integration can go live in production and become available to all Floify users, it must pass a formal review process, conducted by Floify.

1. When your Integration is ready for review, notify the Floify Strategic Partnerships team.
2. If appropriate, provide a username and password on your system so that an end-to-end transaction can be executed by the Floify review team.

Review Process

The Floify review team conducts the following steps to approve your Integration.

1. A user is created in your development account on Floify for testing your Integration. This user represents a member of an LO team on Floify and a common customer between you and Floify LLC. We'll refer to this user as "Common Customer".
2. Common Customer logs into Floify **using a subdomain like davesims.floify.com or mymortgageco.floify.com but never app.floify.com.**
3. Common Customer clicks the Integrations menu at the top of the screen. This is the Floify Integrations page.
4. Common Customer clicks the Install button to install your integration.
5. At this point, we expect Common Customer to be redirected to a special page on your website where you will prompt Common Customer to log in. If Common Customer is not yet your customer, you can prompt them to either sign up or present a lead capture form to them.
6. Once Common Customer has logged in on your website, you must redirect Common Customer back to the **original Floify subdomain from which the user originated** (per the Technical Details provided in a previous section of this documentation).

7. There, Common Customer is presented with a list of permissions that they are granting to your Integration. Common Customer must decide to Allow Access or Deny Access to your Integration.

Now Common Customer has granted your Integration access to their Floify. Great!

User Interface Touchpoints

There are different locations where your application can be inserted visually within the Floify experience.

- 1. Loan Dashboard:** Your Integration can have a tab, displayed in Common Customer's Loan Dashboard. Here you can present summary information and provide actions to take. For example, a CRM Integration might show an Opportunity Pipeline. Do not prompt Common Customer to log in either to your system or to a CRM. You already did that during the OAuth process.
- 2. Prospects Page:** Your Integration can display prospects from your system and allows Common Customer to select and import them.
- 3. Add New Doc Page:** Your Integration can prompt Common Customer to add a document request to the current loan flow, like a request for electronic bank statements or an electronic 4506-T request.
- 4. Loan Flow Page:** Once your Integration inserts a document request into a loan flow, a borrower can click your icon to open an iframe, where you can guide the borrower to completing the document request, such as providing bank username/password details for an electronic bank statements Integration.

General Guidelines

1. Do not open a new browser tab or new browser window within your Integration. Keep all user interactions within the iframe that Floify has opened for your Integration.
2. Within a Floify iframe (User Interface Touchpoint), never prompt Common Customer to log in to your system. You already did that during the OAuth process. The exception is when it's important for each user to log

in to your system independently, such as is the case with the Salesforce Integration in the Floify Integrations page.

3. Engage your marketing team to develop or crop a logo that authentically captures your usual logo from your website. Developers don't always make the best graphic artists. 😊
4. Test for bad input. Don't assume the Property Address is in a certain format or whether it even exists. You may need to prompt your user for complete Property Address information.
5. Do not show an incomprehensible error message. Keep any error messages simple.