Documentation for Go Fish Originators Zapier App

Version 1.0 | Updated 3-20-25

Invite Link You Will Need To Access Our Zapier App: https://zapier.com/developer/public-invite/221661/3bfa341c1ea36218d8966d2990029d95/

Preface

3-Step Integration Explanation

Step 1 of 3: You agree to allow GFO to place the tracking cookie into your website footer

Referral agents share your URL with borrowers, tagged with a tracking ID (e.g., https://www.mysite.com/?orig=1&tag=223). The script below captures and stores this ID in order to give the proper Referral Agent credit for the referral.



Step 2 of 3: Storing the Originator ID

Option 1: You agree to allow GFO to add a new database field gofish_originator_vendor_id (VARCHAR, 10 digits) in to your LOS or CRM to store the referral agent's ID.

Option 2: If your LOS does not support new fields, we will store it in our own database and use exact time stamps to tie the Referral Agent's ID with the correct loan.

Step 3 of 3: Posting Loan Data to GFO's Database

You agree to link your system with GFO's database through Zapier.

9 Required Database Fields

Stored once per loan: lenders_loan_id, lenders_borrower_firstname, lenders_borrower_lastname, lender_vendor_id (On GFO Dashboard), originator_vendor_id (In Referral URL)

Updated in real-time: loan_status, loan_type, loan_amount, loan_term_in_mths

Loan Type Mapping: Loan types will be mapped via Zapier. Contact us to add additional types if needed.

Loan Status Mapping: The loan status field must match one of the following: "In Process", "Not Approved", "Approved", "Funded".

Test Loan Application

Before activating your GFO Lender account, we must verify the connection via a single loan application test. If GFO completes the integration, we will test it. If your IT team completes it, please test it before notifying us that it is done. Use the GFO demo originator tag 223: https://www.YourSite.com/?orig=1&tag=223. Create a test loan applicant on your website and verify that the referral appears in your GFO Admin Panel under the "Originations" tab. Once verified, GFO will turn on your account.

Instructions To Integrate Via Zapier App

1. Overview

This integration enables automation between **Go Fish Originators** and other apps via **Zapier**. It allows users to:

- Create/Update loans in Go Fish.
- Fetch all loans for the authenticated user.
- Fetch details of a specific loan using Loan ID.
- Fetch loan types from Go Fish to enable mapping from their loan management system.

2. Prerequisites

To use this integration, ensure you have:

- A Go Fish Vendor Account with access to the Vendor Dashboard.
- Email from the vendor account.
- Vendor ID from the vendor account.
- A Zapier account.

3. Authentication Setup

- 1. In your Zap, select Go Fish Originators as the app.
- 2. Enter your **registered email** (found in the Go Fish Vendor Dashboard under **Settings** \rightarrow **Lender Info**).
- 3. Zapier validates the email via the Go Fish API.

4. Actions

4.1 Add or Update Loan

- Description: Creates or updates a loan record in Go Fish.
- How it works:
 - The system checks if a loan **already exists** based on the **Lender's Loan ID** and **email**.
 - $\circ~$ If the loan exists, it updates the details (e.g., loan status).
 - If the loan does not exist, a **new loan** is created.

Input Fields:

Field	Туре	Required?	Description
Lender's Loan ID	String		Unique identifier from your system.
Originator Vendor ID	Integer	 Image: A start of the start of	Vendor ID of the loan originator.
Borrower's First/Last Name	String	×	Borrower's name.
Loan Type	String	×	E.g., "Conventional", "FHA".
Loan Amount	Integer	×	Loan value (e.g., 260000).
Loan Term (Months)	Integer	×	The duration of the loan in months (e.g., 360 for a 30-year loan).
Loan Status	String	×	The current status of the loan (e.g., "APPLICATION_INTAKE", "IN_PROCESS", "APPROVED", "FUNDED")

Sample Request:

{
 "lenders_loan_id": "98765432",
 "loan_status": "APPROVED",
 "lenders_borrower_firstname": "John",
 "lenders_borrower_lastname": "Doe",
 "loan_type": "FHA",
 "originator_vendor_id": 3456,
 "loan_amount": 250000,
 "loan_term_in_months": 360
}

}

Success Response:

```
{
  "success": true,
  "loan_id": 111,
  "message": "Loan successfully created."
}
```

4.2 Retrieve All Loans

- **Description:** Fetches all loans for the authenticated user.
- Use Case: Useful if the user wants to write loan data to a Google Sheet, their database, or any other system.

4.3 Get All Loan Types

- Description: Returns a list of 182 loan types from Go Fish.
- Use Case:
 - Enables mapping loan types.
 - Users may have loan types that do not match Go Fish's predefined types.
 - They can fetch loan types and create a **Zapier Lookup Table** (Zapier Utilities
 - > Lookup Table) to manually map their loan types to Go Fish loan types.

4.4 Get Loan Details

- Description: Fetches details for a specific loan using its Loan ID.
- Input Field:
 - Loan_ID: A dropdown populated with available Loan IDs from your vendor account.

5. Error Handling

Error Message	Cause	Solution
Authentication failed: Invalid email	Email not registered in Go Fish.	Recheck email in Vendor Dashboard.
No loan data found	Invalid Loan ID.	Verify the Loan ID exists in Go Fish.

6. FAQs

Q: Where do I find my Lender Vendor ID?

- A: It is on your **Dashboard**.
- Q: Where do I find my registered email?

A: In the Vendor Dashboard > Settings > Personal Info section.

Q: Can I update an existing loan?

A: Yes. Use the add_new_loan action with the same Lender's Loan ID to overwrite data.

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How to Use Zapier to Connect Your System with GFO

Link to template: https://zapier.com/webintent/create-zap?template=255618320

1. Creating a Loan in Go Fish via Zapier

In this guide, we will show you how to connect your system to **Go Fish** using **Zapier**. We are using **Arive LOS** as an example, but if you have a different system, you can use a **Webhook** instead.

Step 1: Set Up a Trigger

A **trigger** is what starts the process in Zapier. This happens when a new loan application is submitted in your system.

Option 1: Using Zapier integrated LOS (e.g Arive LOS)

- 1. In Zapier, click Create a Zap and select Arive API (1.0.15) as the trigger app.
- 2. Choose the Trigger Event: "New Loan in Arive."
- 3. Connect your Arive API account (you may need to log in).
- 4. Click Continue and test the connection to make sure Zapier is getting loan data.

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Screenshots for reference:

Option 2: Using a Webhook

- 1. In Zapier, select "Webhooks by Zapier" as the trigger app.
- 2. Choose Trigger Event: "Catch Hook."
- 3. Zapier will generate a Webhook URL—copy this URL.
- In your system, set it up to send loan data to this URL when a new loan application is submitted.
- 5. Click **Continue** and test to confirm that data is being received.

Use this option only if your system does not have a Zapier integration.

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Step 2: Get Loan Types from Go Fish

Since different systems may use different loan type names, we need to **fetch loan types from Go Fish** so we can match them correctly before creating a loan.

1. Add the "Get Loan Types" Action

- In Zapier, add a new action step.
- Select Go Fish Originators (1.0.0) as the app.
- Choose the Action Event: "Get All Loan Types."

2. Test and Retrieve Loan Types

- Click Continue and connect your Go Fish account.
- Test the step to ensure Zapier successfully retrieves all loan types from Go Fish.

3. Why This Step is Important

- Every loan system may have different loan type names.
- This step pulls Go Fish's official loan types so we can map them correctly.
- Without this, mismatched loan types could cause errors when creating a loan.
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Screenshot for reference:

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Continue				

Step 3: Map Loan Types Using Zapier Utilities

Since your system's loan type names may not match Go Fish's, we need to map them correctly using **Zapier's Lookup Table**. This ensures that the loan type sent from your LOS (or webhook) matches Go Fish's accepted values.

1. Add a Lookup Table in Zapier

- In Zapier, add an Action step.
- Select Formatter by Zapier \rightarrow Utilities \rightarrow Lookup Table.

2. Set Up the Lookup Table

- Lookup Key: Select the loan type field from LOS (or Webhook).
- Left Side: Enter the loan type names as they appear in your system (handwritten values).
- Right Side: Select the corresponding loan type from Go Fish, fetched in the previous step.

This step ensures that every loan type from your system is correctly translated into Go Fish's loan types.

3. Test the Mapping

- Click **Continue**, then **Test & Review** to check if the correct Go Fish loan type is returned.
- If the output is correct, mapping is successful.
- If not, double-check that the loan type names are spelled exactly as they appear in your system.

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Step 4: Create a Loan in Go Fish

Now that we have mapped the loan types, the next step is to create a loan in Go Fish.

1. Add the "Create Loan" Action

• In Zapier, add a new Action step.

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- Select Go Fish Originators as the app.
- Choose the action event: Add or Update Loan.

2. Map the Required Fields

Now, map the fields from your LOS (or Webhook) and the Lookup Table to Go Fish's loan fields.

Go Fish Field	Mapped From (LOS/Webhook)
Lender's Loan ID	Loan ID from LOS/Webhook
Originator Vendor ID	Vendor ID from LOS/Webhook
Borrower's First Name	First Name from LOS/Webhook
Borrower's Last Name	Last Name from LOS/Webhook
Loan Type	Output from Lookup Table (Go Fish Loan Type)
Loan Amount	Loan Amount from LOS/Webhook
Loan Term (Months)	Loan Term from LOS/Webhook
Loan Status	Loan Status from LOS/Webhook

3. Test the Loan Creation

- Click **Continue**, then **Test & Review** to check if the loan is successfully created in Go Fish.
- If the test is successful, you'll see a confirmation.

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Loan Term (Months)		
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All set! you just need to publish this zap and now every new loan application from your system that has a GFO Originator ID attached to it will be automatically sent to GFO through Zapier and show in your GFO Admin Panel.

2. Updating a Loan Application in Go Fish Using Zapier

The process for updating a loan application in Go Fish is almost the same as creating a loan, except that the trigger will be different. Instead of triggering on a new loan, this Zap will trigger when an existing loan is updated in your system.

Step 1: Set Up the Trigger

You have two options for the trigger:

Option 1: LOS (If Your System Has An App In Zapier)

- In Zapier, select your LOS as the trigger app.
- Choose the trigger event: Loan Status Updated or Loan Data Updated (whichever applies).
- Connect your LOS API account.
- Click Continue and test to make sure Zapier detects loan updates.

Option 2: Webhook (If No LOS Integration)

- In Zapier, select Webhooks by Zapier as the trigger app.
- Choose the trigger event: **Catch Hook**.
- Copy the generated Webhook URL and configure your system to send loan updates to this URL.
- Click **Continue** and test to ensure the data is received correctly.

Step 2: Get Loan Types from Go Fish

- Add an action step in Zapier.
- Select Go Fish Originators (1.0.0) as the app.
- Choose the action event: Get All Loan Types.
- Click Continue and test to retrieve loan types.

Step 3: Map Loan Types Using Zapier Utilities

- Add the "Lookup Table" action from Zapier Utilities.
- In the input field, select Loan Type from LOS or webhook data.
- The left side of the table should have loan type names from your system.
- The right side should have loan type values from the previous Go Fish step.
- Click **Continue** and test to make sure it returns the correct value.

Step 4: Update the Loan in Go Fish

• Add an action step in Zapier.

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- Select Go Fish Originators (1.0.0) as the app.
- Choose the action event: Add or Update Loan.
- Map the following fields from your trigger data:

Go Fish Field	Mapped Data from LOS/Webhook
Lender's Loan ID	Lender Loan ID (Used to find the existing loan)
Loan Status	Loan Status (if provided)
Lender's Borrower First Name	Borrower First Name (if updated)
Lender's Borrower Last Name	Borrower Last Name (if updated)
Originator Vendor ID	Originator Vendor ID (if updated)
Loan Type	Mapped Loan Type from Lookup
Loan Amount	Loan Amount (if updated)
Loan Term (Months)	Loan Term (if updated)

• Click **Continue** and test the step to confirm the loan updates successfully in Go Fish.

Final Steps

- Turn on the Zap to automate loan updates.
- Anytime a loan update occurs in LOS or via webhook, the Zap will update the loan in Go Fish automatically.
- Finally, contact Go Fish by clicking the "Contact Go Fish" link on your Go Fish Admin Panel dashboard and let us know you're done so that we can verify the integration and upgrade your account to one where you are visible to all Broker Referral Senders on the platform.