

# 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/>

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## 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.

```
// Function to get the value of a query parameter by name
function getQueryParam(name) {
  const urlParams = new URLSearchParams(window.location.search);
  return urlParams.get(name);
}

// Function to set the cookie
function setCookie(name, value, days) {
  let expires = "";
  if (days) {
    const date = new Date();
    date.setTime(date.getTime() + (days * 24 * 60 * 60 * 1000));
    expires = "; expires=" + date.toUTCString();
  }
  document.cookie = name + "=" + (value || "") + expires + "; path=/";
}

// Function to get the value of a cookie by name
function getCookieValue(name) {
  const value = `.${document.cookie}`;
  const parts = value.split(`.${name}=`);
  if (parts.length === 2) return parts.pop().split(';').shift();
}

// Get the 'orig' and 'tag' parameters from the URL
const origValue = getQueryParam('orig');
const tagValue = getQueryParam('tag');
// If the 'orig' parameter exists, set it as a cookie
if (origValue) {
  setCookie('Orig', origValue, 180); // Set the cookie for 180 days (~6 months)
}
// If the 'tag' parameter exists, set it as a cookie
if (tagValue) {
  setCookie('Tag', tagValue, 180); // Set the cookie for 180 days (~6 months)
}

// Example usage: Get the 'Orig' and 'Tag' values from the cookies
const origValueFromCookie = getCookieValue('Orig');
const tagValueFromCookie = getCookieValue('Tag');
```

#### 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.

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# 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** → **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**.
  - 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	Type	Required?	Description
Lender's Loan ID	String	✓	Unique identifier from your system.
Originator Vendor ID	Integer	✓	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.

**THE REST OF THIS PAGE HAS BEEN INTENTIONALLY LEFT BLANK**

# 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.

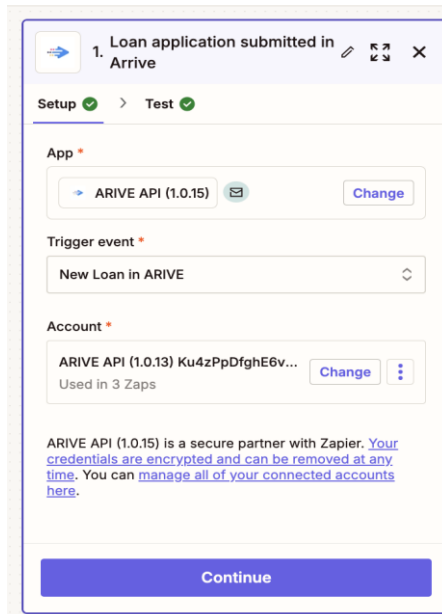
### Step 1: Set Up a Trigger

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.

#### 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.
4. 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."

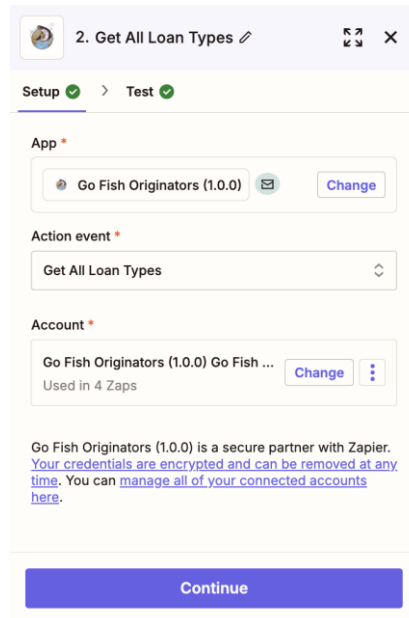
### 2. Test and Retrieve Loan Types

- 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.
- 1.

 **Screenshot for reference:**



## 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** → **Utilities** → **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.

The screenshot shows the Zapier 'Lookup Table' configuration interface. At the top, there are navigation buttons for 'Next step' and 'X'. Below that, there are tabs for 'Setup', 'Configure', and 'Test'. A search bar for fields and a 'Filter by' dropdown are present. The 'Transform' section shows the 'util.lookup' action. A tip states: 'Given a key and table - find the matching value.' The 'Lookup Key' is set to '1. Mortgage Type: Conventional'. The 'Lookup Table' section contains the following mappings:

Local Loan Type	Go Fish Loan Type
Conventional	2. Loan Type 83: Conventional Personal Mortgage
VA	2. Loan Type 168: VA Purchase Loan
FHA	2. Loan Type 99: FHA Basic Home...age Loan 203(b)
USDA_Loan	2. Loan Type 163: USDA Loan
NonQM	Non-Qualified Mortgage
HELOC	Home Equity Lines of Credit (HELOC)
HELOAN	Home Equity Loan

A 'Continue' button is located at the bottom of the configuration area.

## 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.

- 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.

4. Add Or Update loan

Setup > Configure > Test

Search fields: [Search fields] Filter by: All

\* Indicates a required field

Lender's Loan ID \*

1. ARIVE Display Loan Id: 13997182

Borrower's First Name

1. Primary Loan Borrower First Name: Chris

Borrower's Last Name

1. Primary Loan Borrower Last Name: Zapata

Loan Type

3. Output: Conventional Personal Mortgage

Originator Vendor ID \*

277

Loan Amount

1. Total Loan Amount: 99000

Loan Term (Months)

1. Amortization Term: 360

Loan Status

1. Current Loan Status: QUALIFICATION

Continue

**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.

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### 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.

- 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:

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

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**We appreciate your commitment and look forward to a successful partnership.  
Contact us for any further questions or clarifications.**