About FileInvite

The beginning

FileInvite started out life as an internal tool that solved a major problem for Zyber, another business founded by FileInvite CEO James Sampson.

Zyber was a high growth web agency founded in 2009 that built and maintained hundreds of eCommerce websites at a time. Every website required clients to provide photos, video, text, spreadsheets, all the content to populate the site. We constantly requested all this information and struggled to keep on top of maintaining where everything was at. We used spreadsheet lists, emails, folders, and had to constantly following up clients to chase the information. It was almost a full time job.

If clients didn't supply all the information in the right order, or on time, we couldn't progress each job to the next stage. We needed a workflow, so we could get projects underway and keep customers happy.

We built the solution

So what do you do when you have a company full of developers? We built a system to manage the requests for information, automatically notify clients, and let us know where everything was at.
Wow! The difference was instant. Turnaround times for getting information off clients was slashed, and so too was the internal admin managing it.
It worked so well that we thought, hey if it works for us, other digital businesses could use it too right?

So we rebuilt it from the ground up, added things like internal messaging, SMS support, cloud storage sync, digital signature, and a seamless client portal interface, then took it to market.

Other agencies must have the same problem right?

Off To Market

Once we got to market that we found FileInvite had a ton of uses. It was a tool that anyone looking to collect sensitive info in a timely fashion could use.
The easy to use client portal and streamlined experience resonated with a lot of use cases. We saw early adoption from bankruptcy lawyers, accountants, immigration and HR consultants.
They ditched the email chaos of attachments and back-and-forth communications.
FileInvite gives them visibility of clients' documents and the on-boarding process.
They love that it automatically chases clients for them too!
Of those early adopters it was mortgage brokers that really latched onto FileInvite as a great solution.

They saw how easy it is was collect loan documents from their borrowers, and it ensured they were compliant, keeping financial documents out of their email.

A Mortgage Broker Package

With mortgage brokers really responding to our initial software we have developed FileInvite even further in 2019, with a tailored mortgage broker addon.
The package helps brokers to master every element of information collection.
It lets them focus on their core service and developing their business through features like:

- TFN Redaction - automatically remove sensitive tax numbers from PDF files.
- Live forms - let clients complete mortgage forms online like fact find and 1003 application forms.
- Bank Statements integration - automates the collection of bank statements from clients.
- Aggregator & CRM Integrations - connect core platforms and aggregator through prebuilt Zapier templates
- Referral engine - manage referrals and reviews automatically from customers.
- And access to a number of exclusive forums and websites to help them grow their business.

The package is part of our ongoing efforts to improve FileInvite for all users.

Our Future?

We understand that first impressions last.
FileInvite gets formalities and non-relationship building information collection out of the way so you can focus on exceptional client service and experience.
We enable clients to get the information they need, to have impactful interactions with customers, and stay compliant and efficient.

Our focus is ensuring that providing and processing information is an effortless delight, with FileInvite.