# **PRESS RELEASE**

FileInvite Launches Connected Workflow for Lending Document Collection

*New integrations with Salesforce, Hubspot and CRM platforms enhance efficiency, security, and customer experience for commercial lenders.*

**DENVER, CO – April 9, 2025** – [FileInvite](https://www.fileinvite.com/), a leader in secure document collection software for the lending industry, today announced the launch of Connected Workflow integrations, enabling seamless embedding of its platform into existing customer relationship management (CRM) systems. The new functionality allows financial institutions such as credit unions or banks to initiate document requests, send messages, and manage workflows directly from Salesforce, Hubspot, and other CRM platforms, significantly reducing manual handling and accelerating loan closures.

"Manual document collection is one of the most frustrating and time-consuming aspects of the loan origination process for both staff and borrowers," said James Sampson, CEO of FileInvite. "Our Connected Workflows eliminate these pain points by meeting lenders where they already work, reducing implementation time and allowing for faster recognition of efficiency gains."

FileInvite for Lending's Connected Workflows introduce and enhance several key capabilities:

* **Send invites via CRM**: Lenders can request documents directly from their CRM platform, with options to trigger requests automatically when deal stages change.
* **Direct messaging through CRM**: Send and receive messages via the FileInvite borrower portal from within the CRM, maintaining complete conversation history in one place.
* **End-to-end connectivity**: The new integrations build upon FileInvite's existing native connections with SharePoint, OneDrive for Business, Google Drive, Box, and other cloud storage platforms, creating a seamless end-to-end workflow from document request to secure storage.
* **Flexible integration options**: Organizations with specific requirements can leverage FileInvite's comprehensive API documentation for custom integrations or enquire about upcoming pre-built Connected Workflow options.

The new integrations extend FileInvite for Lending's proven benefits for lending institutions, which include:

* Closing loans up to 3x faster (average reduction from 42 to 15 days)
* Reducing manual document handling by 83% (from 120 to 20 minutes per application)
* Increasing close rates by up to 34% over industry averages
* Improving customer satisfaction scores to 4.7/5, an 18% improvement

FileInvite for Lending simplifies the loan origination process, allowing financial institutions to focus on building lasting relationships with borrowers. The secure, automated document collection software reduces inefficiencies, minimizes compliance risks, and improves customer experience without requiring complex system overhauls.

### **About FileInvite**

Founded in 2015, FileInvite helps the lending industry improve borrower experience and increase productivity by simplifying the process of requesting information and collecting documents. The SaaS platform provides an intuitive borrower portal and automated workflows that enable users to digitally complete, sign and upload documents, send communications, and keep track of data requests. Built on the Amazon Web Services (AWS) cloud using industry best practices, FileInvite is SOC2 Type II compliant and meets the privacy and security requirements for handling sensitive customer data. For more information, please visit [www.fileinvite.com](https://www.fileinvite.com/).

### **Media Contact**

Janet Pech

VP of Marketing, FileInvite
j.pech@fileinvite.com