How to send a FileInvite

1. Go to https://us.fileinvite.com/login and Login with Damon's credentials.
2. At the top in a yellow rectangle, click "Create New Invite".
3. In the new pop-up, select "Template" on the right side.
4. In the middle column where it says "Bankruptcy Documents", click the small "+" symbol on the right. The Template labeled "Bankruptcy Documents" will now appear on the far right column under "Selected Templates"
5. At the bottom of the window in a yellow rectangle, click "Create Invite".
6. In the red box that says "Due Date", select the calendar icon to the right of it. Select a due date for the client to submit their documents.
    a. It's typical to give the client a week and a day to get documents submitted. If they request longer, then put a later date.
    b. If the client is on a deadline, give the client a more pressing due date that will give you ample time to complete their case.
7. Scroll down to where it says "Contacts". Below should be a box with a magnifying glass. Click inside the box.
8. Enter the client's information including their phone number. Once all their contact information is entered, click the button that says "Txt/SMS". That will send the client regular texts to remind them to submit documents.
9. In the area where it lists in gray boxes the documents we need, you will need to delete some paystubs that are not within the last 6 months by clicking the small "x" next to the document name.
    a. Ex. If we are currently in March, we only need pay stubs from September to February. You would delete the March to August pay stubs, so only September to December are listed.
    b. You can delete any other document you believe doesn't apply to the client. I.e. if they only receive Social Security Benefits as income, they wouldn't need to submit Tax Returns. You would delete those from the required documents needed.
10. At the bottom of the list of required documents, click "Save and Close". It should bring you back to the invite page where we listed the due date.
11. Look through and make sure everything looks good. Then click "Send Invite" at the top in a yellow rectangle.
12. Your FileInvite is sent!

How to download files from FileInvite

1. Go to https://us.fileinvite.com/login and Login with Damon's credentials
2. Click on the big blue button that says "Requests".
3. In the search bar, search the client's name.
4. When their name appears, click on the "Documents Needed for Duncan Law".
5. In the middle of the page, click on the large red rectangle that shows how many documents the client has submitted. It should be under "Requests".
6. On the right side of the screen should have a blue rectangle that says "Download (client's name)'s Files". Click on it.
7. Click on "Email me the link" which should be on a yellow button. This option will only appear for a little bit before it will automatically appear as a hyperlink. If it does that, then click cancel, and redo this step and make sure to click "Email me the link" promptly.
8. Change the email to your email address. Click "Send email".
9. Go to your Gmail. There should be an email from FileInvite. Click on the email.
10. Scroll down to the bottom of the email where there is a button that says "Download File" and click on it.
11. You should be in a new tab with a black screen with the FileInvite logo. Click the "Download File" button.
12. Save the file to the client's folder in Finder.
13. If it is saved as a zip file, double click on it and a new folder should appear below it. Delete the zip file and keep the new folder.
14. When you click on the folder, there should be a list of documents that were submitted by the client. Label each document and place them in their appropriate subfolders.