



WHITE LABEL CONTENT

Blog Post: Compliance

Why I Rely on Forms Live for All My Real Estate Needs

When it comes to my real estate business, trust is non-negotiable.

That's why I turn to Forms Live – a solution that ensures I can rely on every form and contract I use.

As a real estate professional, I want to work with the best interests of our clients in mind while also making sure we are protected. Since integrating Forms Live into our business, I have seen a significant improvement in my customer service delivery, which has increased client referrals from being referred to us.

We were able to enhance our client experience with Forms Live, and I wanted to share the main ways I rely on Forms Live to run my real estate business efficiently.

1. Updated digital contracts

Legislation that affects real estate transactions – whether that's buying, selling or renting – changes regularly.

When that happens, I am secure in knowing that Forms Live contracts I use are up to date and reflect the latest changes – never exposing me to legal issues. The contracts inside the platform are monitored by expert Victorian property lawyers and the system automatically replaces old contracts.

With these automatic updates, I am always kept in the know with a notification within Forms Live, letting me know about the updates.

2. Automated version control

When I create a digital contract for a client, in essence, I am creating a centralised document.

While the document is still in draft form, the client can advise me of any changes required. Once the form is finalised, however, the document is locked down as a secure PDF, ready for signing.

This document is attached to my client's record inside my CRM - creating a digital data footprint. I have found this method to be much more secure than having multiple versions of a contract emailed or posted.

Thanks to Forms live, my workflow now reduces the chance of an incorrect version being used – protecting me from the wrong people getting hold of important documents, and the risk of fraud.

3. Tracking digital data

One of the best features about Forms Live is that I can maintain a digital document trail without even touching a filing cabinet or a date stamp.

Each time someone in my office uses a digital form or contract, fills in a section, signs, or forwards a copy to another, an electronic record is captured, identifying the date and time of the activity.

A digital log is created of all activity surrounding every one of my documents. These digital logs can be used to prove a document was signed, the correct version was used, and a contract was both sent and received.

4. Easily accessible documents

All digital forms are stored in the cloud and can be linked to my client files in your CRM.

This greatly reduced the risk of misfiling a document by storing it on a cluttered desktop, four folders deep. I can search for a form directing within the platform, finding documents and contracts super easily. By typing the name of the client or an address – or a keyword – and Forms Live will find all related documents – no more rummaging through piles of paperwork.

This workflow saves me so much time, and it especially comes in handy at those moments where I must demonstrate compliance.