

5 Ways Electronic Signatures Can Transform Your Business

Anita: All right, then. Hello.

Ben: Good morning all. Welcome to our webinar. This morning, we'll be sharing five ways electronic signatures can transform your business. I'm Ben Slawitschka, I'm the business development manager for Forms Live. And I'm joined with our General Manager of Dynamic Methods, which is the team behind Forms Live, Anita O'Connor, Hi Anita.

Anita: Hello.

Ben: As I mentioned, we'd be guiding you through the electronic process and dubbing into the infield DocuSign integration as well. So, without further ado, I suppose let's get into it. Anita, how can electronics timing transform business?

Anita: Well, I think we've got a list of five. I like this group of five, which is pretty cool. The first one that we've noticed is definitely faster turnaround with more streamlined signatures, which absolutely makes sense. With electronic signing, the most obvious way it will benefit your business is time saved. We've all got better things to do, like talking to our customers instead of waiting for the post with something signed. Signing digitally greatly reduces the steps from the traditional process consisting of scanning, emailing, signing, and it depends who's got a scanner. I know my Mum and Dad don't.

It is the most efficient option for agents, managers and clients alike. So many of us, it's the digital age. We've got one of these [a smartphone] in our hands most of the time. Being able to sign from those devices from anywhere at any time is proven to deliver faster signing times. How many clients have you had who absolutely expect you to send something electronically for signing? It is now the de facto standard on average - on average, documents signed on Forms Live are returned within 24 hours.

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But when you're considering that's the average, we're finding that some are returned within minutes, which is just amazing. It's a significant increase or decrease of time over the last few years. Sales contracts and sales agency agreements are being returned within 6 hours. Whether the market is hot or not, people just want to sign on the dotted line.

Now, there's two different ways of signing electronically in Forms Live. We've got sign on screen and the ability to sign remotely. So sign on screen is if you are meeting with a customer face to face or they're in your office and you can have them sign a form in person, but it's electronic. What I'm going to do, I'm going to show that, because I think it's a good thing to show. And I'll be quick. I'm in Forms Live - you can see my Forms Live screen. I'm going to hop into a form.

This one I prepared earlier. It's a rental agreement. So I've created a rental agreement. And what I'm going to do, pretend all of it's filled out okay. I'm going to finalise it so it gets to that signing stage. So once I've finalised this form, I have got the option. Yes, I've got on the right hand side the DocuSign option appearing - but I want to start because I've got my client in front of me. I've got two partners that need to sign this, one's in front of me and one's in their office interstate. When I click on signing, I've got the option to sign on screen. So they're in front of you, you've got a tablet device and I want them to sign right then and there. Awesome form for sales agency agreements, but yes, whatever form it is, sign on screen and I choose who's the person in front of me. What have we allocated them to? So in this case it's oh, I think it's Alex. Let's see, it's Alex who's in front of me and he's Renter One. So I'm going to click renter one. I've got my tablet device, I'm going to start the process and who, I'm logged in, I know who this person is, they're in front of me. They'll agree or disagree to sign electronically, starting the process. And this is where I literally pass my tablet device to Alex, who's sitting in front of me, and say, great.

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There's two signatures required in this particular form for you, my renter one. They'll click on this yellow square and using a finger or one of these groovy little pens with the nip at the end, I'm going to use my mouse. They can sign on screen and it takes them to the next spot where they need to sign. And once that is signed, I want to complete and that's locked in my sign on screen signature for that person in that form, we add the date.

So we are now ready for that person that's now signed on screen - And I can now send this document to the second party, the partner, the person remotely. So by looking at that signing dialogue on the right hand side, I've now got this ability to send my form via DocuSign, which is built into Forms Live. And I can send this to Renter Two, the second person, Nadia who is in her office interstate, like I said at work. And I can simply click next. I'm going to click next - And sending for signatures remotely is as easy as that.

I can see on the left hand side that I've got those two sent out to the rental provider as well as the Renter ready to go, sending it off remotely. So awesome. Done. How much time have I saved there?

Ben: Our second feature is mitigating the risk of human error. With Form Slide and DocuSign working together and mistakes that would be considered major when handling hard copy paperwork and so on, are only considered minor. How many times have we completed a form, got to the 9th or 10th step and made an error and we've had to go through it again. So you don't need to worry about that sort of stuff. When it comes to Forms Live and DocuSign - we all make mistakes, we're all human. However, those mistakes can still leave a bad impression on clients, or they could lead to them not actually receiving the paperwork at all. But this is when the DocuSign integration can be handy beyond its main function of sending and signing. If you've incorrectly entered contact details, name, email address, or so on, these things can be edited even once the request has been sent out. I think you've actually got it up on the right there Anita.

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If you think about the wrong person or the old chestnut that people say, I never got that email, or anything like that, you don't need to worry about filling the form in again. You can actually just duplicate and resend.

Anita: Actually, you don't even have to duplicate Ben. This is the form that I just sent in my demo and I'll show you while I'm in here. As Ben said, I'm sure you've all spoken to clients who said exactly that. I can't find it, it's not in my mailbox. There's a couple of options. You can use this edit and resend so you can choose to resend it to the exact same email address that you originally entered and it'll pop to the top of their mailbox. This is awesome when you're on the phone with them, you can simply say, "listen, I'm going to send it to you right now. Keep an eye out right now for your email that you'll receive" - which is branded from DocuSign, but it's got my name on it so that you can send it immediately. The other option is that mailbox, I'm not using that one anymore. Or can you send it to this email address instead because I'm in front of it. You can change I forgot to put a 'J' at the end of her email address and you can resend it. So you've got that ability and you can see it from the status and that signing dialogue, signing sidebar, which is pretty cool.

Ben: It's a great feature.

Anita: It is. Like I said, we try to cover all our bases and the excuses that people will come up with, but we've had it too. I'm sure that I know my mailbox can get out of control sometimes, but anyway, we'll move on. Our third item, our third way electronic signing can transform your business. Perfectly valid within this residential rental agreement is the ability to offer utilities faster and easier. So we're certainly quite aware that a lot of Property Managers have got an association with a utility provider. They're a vital part of the moving process for renters, and Property Managers want to support renters as they undergo their big move. All these little things that you help them with.

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Unfortunately, the process isn't always easy between contacting renters and making arrangements or if you have to send a separate email. I know, I've been in an agency and they've described how they have to do it. They send a separate email once the rental agreement has been signed. Now, within Forms Live, under our Connections area, we have various utility connection providers available. So once you connect, once you've chosen your preferred utility provider, you can connect within Forms Live by entering your ID - some are email addresses, some specific IDs - and you're in control of the process. You can choose who is connected - I know of agencies that switch which utility provider they prefer to use - and when the connection is made, as soon as you've connected in Forms Live, at the end of the rental agency rental agreement signing that will be offered to them. Now, I'm not explaining this as well as I could, so let me show you a little video I prepared.

[\[Residential Rental Agreement With Utility Connections tutorial played - linked HERE\]](#)

Anita: The good thing is it's at the end of the signing process, so you have captured their attention, they're wanting the rental property, they're in that signing process and it's right in front of them. So it creates that value and it's a time saver both for you and your client, which is awesome. And it eliminates the back and forth.

Ben: Very true. Now, moving on to four - PDF attachments sent and signed. So I'm sure that you guys send out renters guides, Section 32s, all that sort of stuff, and you probably struggle to get an acknowledgement that your clients have received them, but I don't recall getting that, I don't remember receiving that, and so on. So with this feature, you can actually attach those documents to a form that you're sending out and actually have a signing request highlighted on that form. So you can acknowledge they can acknowledge, and you would know that they've actually received it, cited it and signed it and it's all available within form five. All it is is a drag and drop your own signature fields. Then you can add them, sent alongside the form and signed by the client, just like the standard signature process. So it's that easy.

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Anita: I've got a video, it's only a minute long, but let's go for that one too. Let me show you how it works. And all of these videos are available in our help guides too, which is handy if you want to have a little replay. But let me play it for you now.

[\[Signing PDF Attachments tutorial played - linked HERE\]](#)

Anita: It's worthwhile setting up if you're interested in getting that Acknowledgement on your attachments - that way there's no dispute, is there? Yet you signed it, it's on there. All right, so are we up to our last item, Ben?

Stay in the know with status updates. So, with all of this ability to send forms out for signature, attach PDF files and even the utility connections, we provide a status update within the forms as well as from the Forms screen itself. So you will see that you can hover and I can see so the little orange markers are highlighting that this form has been sent out for signature and is yet to be signed. I can see that there's one down here that I have fully signed. I can filter. So what have I got out for signing? And again, hovering, I can see who are the outliers - who do I need to ring to remind gently that they need to sign a form - and what has been signed. So you've got this ability and with utility providers - I don't think I've got one here - there's another little icon again, it's a green lightning bolt. That means that the person has accepted a utility connection. If it's in orange, that means that it is still waiting for acceptance. So this ability to filter and see what's out for signing. Know the status, and again, you've got that status icon within the form itself. You'll be able to find that in depth overview of the status history of the form in the sidebar - with the dates that it was sent and sending has been completed - and once signing has been completed, you can download your signed document from either the sidebar or when you're printing, you've got that option of printing that executed agreement. Status updates can also be accessed in the mobile view as well. So we support the ability for you to view the statuses straight from your mobile phone should you decide to do that. It's not an app, you just need to use your browser, navigate to

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[vic.formslive.com.au] and login like you normally would, and you've got that ability to see what the standing is of any of your forms.

Ben: It's also worth mentioning guys, obviously Forms Live has DocuSign built in, but some of you may have your own DocuSign account that you use for other purposes and so on. You can actually integrate that into Forms Live if you wanted to. All you need to do is simply go to the Connections page and put the login details in and you'll be able to use your own. Rest assured, if you don't have a DocuSign account, you don't need one with Forms Live because it is built in and part of your subscription. So there's no need to worry about that.

Anita: Absolutely. So you can connect your own DocuSign account there, but we've got it built in. Whatever works for you. So I think that's it. I think we do have a question that has come in then. If anyone's got any questions, please feel free to ask us on the Q & A, which appears on the screen on the toolbar at the bottom of your screen, or it's at the bottom of my screen edit feature.

So Nikki has asked, with the edit feature, are you able to add signing initial tabs and text box tabs? Price needs to be increased after initial documentation has been executed. That's something we're working on. Nikki, I think I'll get Ben to reach out to you. We've got a few new features hidden up my sleeve that are about to be released. We're looking at ways that you can do revisions - it is certainly a question we've been asked, so Ben, maybe you can reach out to Nikki to have a chat. Anyone else?

Mix of old fashioned ink and DocuSign. Good question, Tony. So, yes, you can do that. We certainly do have that question that's popped up. If you've sent a form to two people to DocuSign as an example, one of them may have chosen to not proceed with DocuSigning with electronic signing. And they've got the ability in DocuSign to say, to choose to print and to decline the electronic signature. So yes, you can. Our forms cover off on counterpart signing so you can have a paper version that you've printed that Alex signs in person and Nadia can sign electronically, so they both form the same form.

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We've actually got a document ID on all of our forms so that you can match that the document number is the same. So, yes, you can mix both and you'll see that within the sidebar. Let me just open within the sidebar, I can download an incomplete document. So what that's showing me is the signers that have signed and then you can use ink. So I hope that helps you Tony.

Paul, Can I send a document to be signed without a form from within Forms Live? Not as yet something we're working on. I think I might get Ben to have a chat with Paul, if that's alright with you, Ben, to find out what types of forms, because we are certainly looking at options available. We are covering off on the ability to send a contract. We've got a contract cover sheet in Forms Live, but that just deals with the contract. I'd love to get them to have a chat with you to find out what you're wanting to send. So we do have a contract of sale cover page so you can send a contract for signing if it's been prepared externally. I think that's all of our questions. Have I missed any? No. That looks good. Thanks Nikki.

Ben: Short and sweet, just under 30 minutes.

Anita: Perfect. Thank you everyone. We will continue with this series of webinars providing you with tools in Forms Live to make your life easier. So talk to you another time.

Ben: Thanks guys. and my details are there if you need to reach out. But I will follow Paul and Nikki up as well at some stage with your questions and so on. If you need any assistance, please feel free to give me a call or shoot me an email.

Anita: Awesome. Thanks Ben. Thank you everyone.

Ben: Thanks, Anita. Have a great day, guys.

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