

## Forms in the Field

**Marc:** Good morning, everyone! Thank you for tuning into today's session. We are super happy to have you here, and if you haven't attended before, my name is Marc Persico, I am the Content Creator here at Forms Live. Today, I'm joined by Ben Slawitschka who is one of our Business Development Managers. Before we start, just feel free to ask any questions throughout the session, you can use the chat or the Q&A feature and know that we'll be allocating time at the end of the session as well for any questions you may have. So, as we established in our emails, we aren't psychics...however, we decided to run this webinar because we had the feeling that property managers in Victoria wanted to work more efficiently when they're spending time in the field - and that's only natural, isn't that right, Ben?

**Ben:** That's right, Marc. So, if you're a property manager tuning in and wanting to make the most of your time on the road, buckle up, get your coffee (which you already probably have) and we'll train you in the tools available within Forms Live that will allow you to take forms on the move and automate your workflows.

**Marc:** Great! So, let's get started with a scenario that our viewers can probably relate to - so, you're in the field and you want to check the status of a form and see if it's been signed before you make your next move or set up a new task...what can we do then?

**Ben:** Yeah, so a good place to start, Marc, is the platform's mobile and tablet capabilities. The scenario you mentioned can be a real pain point for a lot of subscribers, and that's actually what sparked today's discussion...some of you might not know that you can take Forms Live with you on the road, which is why we've titled this webinar 'Forms in the Field' - so, all you have to do is get out your mobile phone (not while you're driving, we highly recommend you pull over!) Open the platform, as Marc has, from your phone's browser, sign in and visit the form's page - and then check the status beside the form in question.

**Marc:** Yeah, that's a great option for our viewers, Ben, mobile view is a very handy tool to have when you're on the go and following up with clients. However, it admittedly doesn't offer quite as much capability as our smart tablet view! And you heard that correctly, Forms

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Live does have smart tablet capabilities, meaning that you can take your forms with you as you jump from property to property. This is useful for any managers who find themselves filling out fields with their clients in the room with them, which is especially nifty, if you want them to sign in-person with our sign on-screen feature, which we'll get into later. Our tablet is a great tool for anyone who wants to boost their productivity in and outside the office, and it's really as simple as accessing the platform from your tablet browser, no app downloads are necessary. I'm just glad we're talking about these aspects of our platform - I think that they're super useful, but not a lot of people know, so they go unnoticed! Here's another situation for our viewers that they might be able to relate to...how many of you have forgotten about utilities, or simply just don't have the time to make the arrangements, I think we can all agree that utilities are a vital part of the renter's moving process, and let's face it, they make you look a lot better as a property manager. We want you to make easy work out of utility offers by connecting with a utility provider on Forms Live. It's a one-time setup and you have automated offers of utilities popping up every time a renter signs an agreement.

**Ben:** Yeah, trust us when we say these features are a super simple way to assist your clients with their big move. As Marc said, you can connect with your utility provider and integrate the offer of utility services into the agreement signing process saving you the needless phone calls and the follow up, benefiting clients with assistance and all sorts of services like moving, electrical, and more. Obviously, when we're talking about client relationships, it's clear that this is a tool to have on your side because it solidifies your reputation as a great property manager - and I think Marc's going to take us through an example here of how easy it is. So, we find the connections page on the Forms Live sidebar, which Marc is pointing to, scroll through to the provider that you want to connect with and click Connect, enter your username in the pop up, and it's as simple as that.

**Marc:** Yeah, well explained. That's really the gist of it, guys. The process is super simple, and it's also super simple for your clients as well. In fact, I believe we have a video here that delves into the agreement's signing process with an offer of utilities from the client's perspective

[VIDEO LINK](#)

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Oh, there you go, everyone. We know it's not fun playing phone tag with clients. So, we really hope you give this feature a try. It's really about automating a process that otherwise would require multiple phone calls and just disrupts everybody's busy day. Okay, we also wanted to dedicate some time to eSigning and signing out in the field. Isn't that right, Ben? We've all been there your client is in a different state or they're stuck at home with the flu. What can you do? How can we get this form signed?

**Ben:** Well, let's start with remote signing since it's something we all had to get used to during the pandemic, which seems so long ago now, we all quickly realise how truly efficient it could be. Especially when it comes to field work. eSigning on Forms Live is inbuilt and completely free to use. So, what does inbuilt mean? It means no additional connections nor payments. So, you'll find the remote signing option conveniently waiting within the signing tab, beside the relevant form off to the right here, which Marc is showing you there - and all you need to do is, within the form, move to the signing tab in the sidebar, enter the client's name, and email address, then confirm their details before clicking next. Here, you can then send and include a message or CC any additional parties you'd like to have the completed form forwarded to and then click send and you're away! After that, the clients will receive an email granting them access to the form digitally to view and sign, and it's all done and completed.

**Marc:** Yeah, it's pretty much the same process as that video we just showed you! You can't go wrong with remote signing, and just to add to that, if there was a single feature capable of making the visit to or by clients run smoother and quicker, that would be sign on-screen. With this signing alternative, you can invite sellers into the office or any nominated location and allow them to sign in-person through a process that remains fully electronic within Forms Live, keeping their forms and signatures stored in one secure location - and all you need is a tablet or stylus - here's a quick demo, you'll find the signing option at the very top here, you'll click start sign on-screen, it will establish which signer is signing the form, they'll agree to the terms, and then they'll be taken to the field in question, all they'll have to do is tap the other box, scribble in a signature, and click save, and it's done! Super simple, we also recently made improvements to eSigning. You can learn a lot more about that from our news page, and we might even do a webinar covering them soon, make sure you keep an eye out. We actually have one final feature to discuss with you today, and it almost goes

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against the name of today's webinar because it's a useful tool for property managers who simply don't want to deal with forms in the field at all.

**Ben:** Yeah, so if you someone who wants their forms to come preloaded with everything they need, so you can spend less time on them. Well, that's exactly why we introduced the templates feature. Templates allow you to generate forms that are often reused for more than one transaction, once prepared and saved, the templates can contain prefilled data, and can be used to create forms with all the data populated waiting in the new form immediately. Apart from the field data, you can add annexures and external documents as attachments, they'll be saved within the template and generated alongside future forms.

**Marc:** Yeah, that's right, Ben, we also have a video that can better demonstrate this entire process as well. Let me chuck that on screen now.

[VIDEO LINK](#)

Fantastic. Those are the points that we wanted to cover today; I hope any property managers tuning in can benefit from the tools that we've shared. Hopefully, it'll change how you work out in the field and help your agency reach new levels of success and efficiency. If anyone has any questions, please use this time to flick them in the chat or the Q&A feature. We'll answer them as best as we can. We'll give you all a chance to do that now.

**Ben:** Silence is golden! Okay, you can reach out afterwards if you think of some something once we jump off, Marc's going to put the details up anyway.

**Marc:** There you go, also before everyone goes I'll just spotlight our partners program. This is something new that we've established for existing subscribers, basically, when you recommend Forms Live to a friend or another agency and they subscribe to the platform, you'll be given a free additional month of access if they mentioned your name, you can claim additional months for every person that you successfully refer us to. For more information on that program. I'll point you to our partners page which you'll see the link for there or you can also contact our BDMS their details are on the screen. They're happy to talk free trials, forms, pricing, and whatever you need help with. Thanks for tuning in today everybody!

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