

How-To: Minimise Data Entry

Marc: Well, hi, everyone. Welcome to today's webinar. I'm Marc Persico, I'm the content creator for Forms Live and I'm joined by one of Forms Lives' Business Development Managers, Ben Slawitschka. We'd encourage you guys to introduce yourselves and your agencies in the chat as well. We'd love to know who's tuning into this - and if you have any questions throughout today's webinar, then the chat or the Q&A feature will enable you to ask those questions, send them through those, and we will address them as we get the chance - so, today's webinar, as you can see, is called 'How-To: Minimise Data Entry', should we give our viewers a bit of a rundown on what we're delving into today, Ben?

Ben: Sure, Marc. Obviously, we're tackling one of the biggest issues in our industry, I suppose, admin work. We want to show you ways in which our technology can counteract that and provide a few little tips and tricks here to cut the copious amounts of data entry that you're enduring. We really want to emphasise the fact that without the right tools, you're spending hours and hours, filling in property details, contact details, and so on - it feels like it's endless sometimes! But with what we show you today, we're hoping that can cut down your workload. So, Marc and I just want to jump on board and show you what we can do, what's required, and all that sort of stuff - why don't we jump into it?

Marc: Yes, let's get into it. We'll start simple with ol' reliable, if you will, templates! So, templates allow you to create forms that can be used for more than one transaction and once prepared, the templates contain pre filled data, they can then be used to create forms so that all the saved data gets transferred into new forms immediately. That pretty much means you aren't spending half as much time on data entry and admin work, and that sounds like a pretty good deal, right? So, let me go through this process with you.

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You'll want to go to the 'Templates Page', you'll find it right here, you'll click 'Create' and you can find the form you're after, and it should be noted that all the forms available can be turned into templates as well, you want to give it a name, and then you'll click 'Create'. Now, you can pretty much just fill out any of the fields with all the data that you find yourself often reusing and then don't forget to click 'Save' as well when you're done - so that's pretty much just the basics of saved data, Ben, what else can be included on templates?

Ben: That's right, so 'there is more' as they say...so, apart from field data, you can add annexures, if you like, even external documents as attachments. We're going to show you how to do that, move across to our sidebar, as Marc has pointed out here, our 'Annexure Tab', tick the ones that you need. Once you've done that, click 'Update' and that will be added into the form that you're going to save as a template as well. It's as easy as that. But it doesn't stop there - obviously, there's annexures there that we have, but you can also add your own attachments! So, there might be a Renter's Handbook that you want to go out or a Section 32 to a Contract of Sale. All you need to do here is click the 'More' button, which is right up the top, then, click 'Files'. It's as simple as finding a file on your computer, click 'Choose File' and once you've found the right file, click 'Upload' and it'll be added to the form as well.

Marc: Yeah, awesome. Well, that's a good rundown of template creation...but let's talk about form creation assisted by templates. So, again, you're still on the 'Templates Page', you'll want to click the three dots beside the relevant form and then you want to click 'Create Form', then, you'll give it a new name and then click 'Save'. And just like that, you've created a form that has all your annexures, all your fields filled out, and also has your attachments as well - it's as simple as that, you've created a form and it's all there. We want you to take a second to consider the fact that you're usually spending SO much time on forms and with a form that's generated near completion and just about ready for signing, you have all this extra time that you can spend focusing on work that actually keeps you excited.

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Ben: Yeah, that's a great point, Marc. Just touching on that example that you brought up about the 'Rental Agreement' - So, a good example of things that you might want to save in the template are your fees, and so on, so you're not having to put them in through all the time, that might charge landlords; they'll cut your admin time down tremendously as well. So, moving forward, this is probably one of my favourite features for data entry, with an integration with your CRM. Some of you might be aware that we actually do integrate with most CRMs, the obvious question is, why would I? Well, a lot of the data that's in your CRM can actually flow through to these forms, so you're not having to deal with double entry. Here's the thing, CRMs hold a lot of your info, so, why not actually streamline the process. You've got Vendors details, Rental Providers, Tenants, and so on. So, a lot of that will flow through without having to put it in twice. Before we get into it, I do want to bring up the list, Marc, of who we actually do integrate with?

Marc: Yes. So, everyone, we integrate with Agentbox, Ailo, APM Pricefinder, Console Cloud, Eagle, Inspection Express, Inspect Real Estate, Mantis Property, Palace, PropertyMe, PropertyTree, Reapit, Tenant Options, The Property Platform, Trudi, and VaultRE.

Ben: Yeah so there's quite a few there, and we are in discussions with a few more - If there is one that you deal with that you don't see on the list, Marc will put up my details towards the end, we're more than happy for you to reach out and have a chat with you and see what we might be able to do. But, to show you how these integrations work. It's as simple as going to the 'Connections Tab', which is off to the left, which is Marc showing just there, then off to the top right, which is the 'New' button, so if we click on that, it'll bring up a list of the CRMs that we work with, all you need to do is find the one that you're after, highlight that, click 'Create', and it will create a token, now, once you've got that token, you can generally send it off to their help desk, and they'll integrate from their backend, but if you need any help, you can always go to our user guide for any questions in relation to specific CRMs or our help desk as well.

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Marc: Exactly. Thanks, Ben. Guys, as Ben mentioned, we can't exactly give you an example of that process as it involves other platforms entirely. However, we do have this video from Console Cloud and this should help you gain a better understanding of the whole CRM connection and implementation process - So I'll just play that now.

WATCH HERE: <https://www.youtube.com/watch?v=hltZAmhmAe4>

Awesome, I think that's a pretty good example of that process. Guys, as I was going to say, it's very different for each CRM. So, you know, make sure you refer to our help guide and also follow up with your preferred CRM as well. Everyone, you spend so much time finding the information that's right for your forms, and then completing field after field and then form after form...it gets exhausting, and it's also robbing you of time and motivation, but it's thanks to technology like Forms Live that it doesn't have to be that way.

Ben: That's right, Marc. We've just sort of touched the surface of templates and CRMs, which are a great way of minimising data entry, and so on, but if you have any questions, guys, feel free to pop them into the Q&A - or if you can't think of anything now my details will go up and I'll be more than happy to have a chat...or shoot them through via email later on.

Marc: Well, guys, if you think of any questions later on, or if you do want to further this discussion, you can contact Ben after the webinar, he can tell you all about our forms, he can help you set up a free trial, or he can even assist you with pricing for your office. If you're interested. I'll leave his details on screen. And if you do need any assistance with any of the tools that we mentioned today, our 'Learning Centre' and 'Help Guide' would be great places to start - you can find our 'Learning Centre' on our website underneath 'Learn' - and, yeah, thanks for joining us today, stay tuned on our socials and our 'News Page' because we will have more webinars coming up.

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