

## Sealing the Deal with Forms Live

Marc: How we feeling Ben, ready for another webinar?

Ben: Yes, yes, all excited. Don't know if anyone's on yet. Suppose this crowd is all Melbourne so they would have gone through the storm that we've just been through.

Marc: Have a few funnelling in. Slowly.

Ben: Howdy guys, just going to wait probably 60 seconds until this audience builds up and we get a few through.

Marc: Feel free to introduce yourselves in the chat guys, just to make sure everything's working.

Ben: Few more coming on board. These are always recorded anyway, guys, if you know someone that was registered and may have missed it they will get - a copy will be available. Anyone can reach out to support or myself at any time, which Marc will share our details at the end. So, might jump into it, hey?

Marc: Yeah, let's do it. Okay. Well, hello, everyone. Welcome to another Forms Live webinar. I'm Marc persico and I'm the Content Creator for Forms Live and I'm joined by Ben Slawitschka, our Business Development Manager. Before we get started, like I said, please introduce yourselves and the agency you're with in the chat. We did have a few issues with the chat last time, so, it'd be good to just see things are working. And if you have any questions, put them in the chat or the Q&A feature and we'll try to help you out as much as we can throughout the webinar. Okay, Ben, what do you think, is it time we bring back face-to-face meetings?

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Ben: Well, I suppose throughout the last few years DocuSign and Zoom had become the industry standard, haven't they? Born mostly out of pure necessity, we couldn't get out and about with lockdowns and so on. So, you weren't able to see people face-to-face, it's easy to forget how valuable being in front of someone and actually being face-to-face can be. It can always help with a more personal client experience. If you're somebody who wants to start meet with clients face-to-face again, make sure you're using the feature that we're about to show you because it's, you know, fully electronic and digital, you don't have to worry about carrying around notepads and pens and stuff like that. It supports in-person signing while maintaining a process that's fully digital, like you would if you were sending it remotely. So, I think Marc is going to take us through a demonstration as we kick off.

Marc: Yep, so let's go through it. So, as you'll see here above the form itself, we have signing, you open that and will be able to click the sign on-screen option. Once you click that, you'll be asked to establish which signer will be signing first, clicking purchaser 1, start, and then you'll have to ensure that the terms and conditions are agreed to before proceeding, then the form will guide you to the areas that need to be signed, as you can see here. So, you click this yellow box, which is the signature field, and it'll prompt you to scribble in the signature - we'll just do a silly on there. Once you click save and then complete, you're done, the signer will have signed the form just like that and then once all signatures have been entered and saved -yeah, that's pretty much how you sign on-screen, the whole process is done just like that.

Ben: Yeah, it's so easy, just like the rest of our platform. So, let me ask you a question, Marc. What would our viewers do when a client's unable to actually commit to an in-person signature meeting?

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Marc: Yeah, I mean, sign on-screen is great but it's not always a viable option and it's probably not everyone's preference either, since, you know, we're living in a digital world after all, if you do want to sign remotely we do still have options for that. We love talking about it so I'm sure most of you would have heard about it already and that's our inbuilt DocuSign integration. It's completely free to use for our subscribers on all our forms so if you want to have forms sent and signed remotely, then that integration is probably going to be your best friend. Shall we get into that, then?

Ben: Yeah, let's do it. Similar to sign on-screen, you can use the signing button to select remote signing or you can open the signing tab directly, which Marc is showing us here. From here you'll need to enter the names of all the signees involved, then click next, and then send. This will trigger a signature request that will be sent out to all the signees, enabling them to access and sign the form through DocuSign. Just to show you the clients end process, they'll click on the continue button which will give them access to the form, obviously, which Marc is bringing up.

Marc: sorry guys, let me just fix that up.

Ben: Yeah, review document, up the top click continue, then they can read the document and then they'll obviously click the sign button and it will take them to where they need to fill in all those. Once that's done, it'll be finalised and you'll get an alert to say that they have signed and completed.

Marc: We do love our DocuSign, don't we ben? And we should probably touch on forms also that we offer that only require a single signature, which is from the agent or manager.

Ben: Yeah, so there is a few of these. So, for example, I'm just going off the top of my head, Notice of Rent Increases, Exclusive Commercial Sale Authority, Notice of Intention to Sell. These forms only require a single signature from you, the sales agents and property managers. This is a very easy process, like all.

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Marc is going to show you here. First and foremost, you have to obviously upload a signature to Forms Live, that you can use. So, in your account settings on the bottom left, find the user tab, scroll down to find the signature section, scribble in or you can upload a signature that you've already prepared, and then save. I'm a little bit precious with mine, because we all know how many boxes there are to fill in and I've got 11 letters in my surname, so my signature is not small. So, you can make it perfect, and you can use that every time, so let's showcase the stamping process there.

Marc: Yep, forms that have signature stamping available, similar to sign on-screen, have the yellow box just there waiting for you, click on that yellow box and then you have to find the account name and signature relevant to you, mine would be Marc Persico, and you'll see the signature that I just uploaded there, you'll click save and it'll populate the signature straight into the field. Once you've clicked save, you'll be done and the form will be signed and completed just like that. It's a form that requires one signature, so we wanted it to be as simple as possible.

Ben: Yeah. And it's really easy. The whole process is with all that we're showing you. And can external documents be signed with Forms Live as well?

Marc: Yes, of course, so, if you guys are having Contracts of Sale or Section 32s prepared Externally, we have that covered, you know, you can still reap the benefits of our features, even when using those external documents. It just takes a bit of preparation. Could you give us a run through of that preparation, Ben?

Ben: Sure can, so when it comes to attachment signing, you have to finalise the form, move to the signing tab and find the attachment at the bottom, which Marc is showing us here, then you'll click signing and that will open our PDF editor. On the right, you'll see the field types that can be added to the document most relevant being signature, name, and date fields. The signature field will drop all three in so click and drop that in, then shift them all into the correct positions, click save, it's super easy. Now, when you send a form for signatures with DocuSign or invite them to sign with sign on-screen, the recipient will be prompted to sign the attachments that have been added as well with those signature fields.

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Marc: Yeah, and it's worth noting that since your name won't populate, we have text fields as well. If you drop that in, you'll be able to type in the name of the signee - that will happen before finalising. I love that feature, Ben. And what if one of our viewers were to make a mistake in the contact details?

Ben: I think all our viewers are probably perfect. But in case they do make a mistake, like we all do, even a spelling error can sort of derail things. DocuSign has a feature for edit and resend which we've integrated into Forms Live and now you can go back and fix any mistakes before re-sending the signature request. Can you just highlight that there, Marc?

Marc: Yes, so going to the one that I sent earlier. You'll see here, in the signing tab, we have the edit and resend button. So, you click that, and you'll be able to go back and see, oh well, that's not the right name and you can retype that in just like that and then you can resend this signature request, it's super easy and it saves you a lot of trouble.

Ben: That's right and everyone's probably aware, but not just with those forms but any of our forms, if you ever need to redo them or duplicate them. We don't charge for redoing forms like some of our competitors do, so rest assured that you're not going to be charged for the extra anyway. I think that sort of covers everything, Marc, unless we've got any questions that you guys might have?

Marc: Yeah, I think we do have a question, Ben. Regarding the file quality of an uploaded vendor statement.

Ben: Anything in particular about the quality, Steve? Is it the size, amount of pages, or? I might give me a call to have a chat afterwards and you might be able to send one through, that I can have a look at. I'll give you a call, I've got your number. Once I hop off here and give you a call.

Marc: Yeah, guys, if you have any concerns that you want to follow up with, I'll show you guys Ben's details really quick and yeah, you can follow up with him there.

Ben: Just one other thing that I wanted to cover off, you guys would be aware that obviously Forms Live is web based. So long as you've got a browser and access to the internet, you'll have access to the platform. We're not restricted to a device or an operating system like some of our competitors are - I know with one in particular you've got to use an iPad, and with some others you've got to use only one machine. If you're using a Samsung, or an iPad, you can sign on-screen or even a laptop if you've got that feature as well.

Marc: Yeah, and also, before we go guy, if you have any problems with similar features like signing, I'll point you towards our new learning centre, here. This is where we pretty much upload all our walkthrough videos and feature spotlights and Webinar recordings like this one. So, if you have problems with signing or forms and you don't want to go straight to support then check out one of these and you'll find the relevant video, most likely.

Ben: That's great. Alright guys, my details are there. If you think of any questions this afternoon, feel free to give me a call. I do, or we do, appreciate you guys joining us. I know you guys are super busy that's why we don't like to keep you too long. We like to keep these under 15 minutes. I hope to see you at the next one.

Marc: Yeah. Thanks for joining us today, guys. Bye.

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