Stress Less, Go Paperless in 2023
An Intro to Forms Live

Marc: Okay, let's start getting into it. Hi, everyone. Welcome to our first webinar of 2023. I'm Marc Persico, I'm the content creator for Forms Live and I'm joined by Ben Slawitschka, our trusty Business Development Manager. Before we do get started today, please feel free to introduce yourselves and put your agency in the chat, let us know who you're repping. We're really keen to know who's tuning in today and if you have any questions as well, please put them in the chat or the Q and A feature throughout and we'll be sure to address those when we get the opportunity.

Ben: Yeah, absolutely. We want to keep these short and sweet. We know how busy you are but want to make sure that you do get something out of it and essentially this year to be about self-care and finding the right tools that will make your job easier and we think that using Forms Live is the best place to do so.

Marc: Absolutely. What better way to spend some 'me time' than on a webinar about stressing less with Forms Live? Okay, Ben, if I was new to Forms Live, I'd probably want to hear about the forms available so can you talk us through what's on offer?

Ben: Yeah, sure. So, most of you have probably logged into the platform and have seen that we have just over 50 sales, property management and commercial forms, which include notices and authorities for PMs, that you guys use on a daily basis. If there's any questions or if you have any forms that aren't included or have requests, please feel free to pop them in chat or shoot me an email afterwards. We're happy to have a look and if there's enough uptake for it, we're more than happy to look at adding some more. But we always share pride in our forms being compliant, which means they're always up to date with any legislation changes. We consult with Colin Biggers and Paisley, who are our lawyers in preparing these forms with any changes that are required. Our lawyers obviously work with our quality assurance officers to make sure that things are ready to go and available when need be.

Marc: Perfect. Great insights there, Ben, Thank you. So, account customisation, I think that's valued on any platform, but in our case, I think agents and managers, they like to rep their brand, they like to show where they're coming from. I think it's important to touch on that for our viewers, how they can include their logos on our forms, but I also think account security is an important conversation to have, Ben. It's a very important these days given conversations around cybersecurity. So, what can our viewers do to not only personalise their accounts but to protect them as well?

Ben: Yeah, good question, Marc. So, you'll find a lot of customisation tools under account Settings, which Marc is showing you now. You can upload a signature for quick signature stamping for forms that only require the one signature from yourself. Then if you scroll down, you can change a password that you might have forgotten to something that's more familiar with yourself, so it's top of mind. Plus, if you move to the logo tab, you can actually upload your agency's logo so it'll have your branding on the forms that are sent out, it'll appear in the top right hand corner. For those people that are keen to represent their own brand, there's a handy little tool there, if you didn't know about it.

We've also added a layer of protection to your account recently, so there is a new feature which will enable two-factor authentication. Sorry, I got that out. On the user tab, which Marc is going to show you now.

Marc: So, two-factor authentication is pretty much activated by clicking enable 2FA and you'll be shown this QR code. You scan this QR code with your preferred authenticator - We recommend Google authentication. Once scanned, you'll be shown a one-time password and for those who don't know, a one-time password is pretty much a unique password that refreshes every 30 seconds. So, once you've inputted it here, you will have activated it, the next time you try to log into your account, you'll be asked to log in with your normal password and then this unique password as well, which is an awesome way of ensuring that you're the one accessing your account. Next up is eSignatures, Ben - I think this is a feature that a lot of people get really excited about when talking about Forms Live. Can we talk about why that is?

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Ben: Yeah, eSignatures have been around for quite some time, but we probably had to get used to them a lot during COVID when in lockdown and not able to see people. I dare say that a lot of these viewers on our webinar this afternoon, this morning, sorry, would know that we integrate with DocuSign. So, DocuSign is part of your Forms Live subscription and free to use. eSigning has revolutionised how people get forms done rather than just the old-fashioned pad and pen. We've seen significant improvement in turnaround time, our subscribers have most forms back within 12 hours and some can have them back within a few minutes. But you don't have to, obviously, sign electronically or remotely if you prefer to have a person come in and sign, that is available. There is sign on screen, so they'll be able to visit the office or if you're visiting them, as long as you've got a touchpad or a touch device, you're able to sign on screen with them as well. And we'll just show you a little video here now of how the whole DocuSign process works...

Marc: Awesome. So yeah, that was a bit of a quick video there, guys, but it's worth reiterating that you don't have to be afraid of making mistakes on Forms Live. If you make an error in contact details, you can just go back, edit the contact details and resend the request or outright void it if that's easier and that's just a luxury you don't really have with hard copy forms.

I think it's also worth paying a visit to the Connections page, Ben. I know a lot of our viewers probably have CRMs that they love to use, so can we talk about how they're able to continue using those CRMs with Forms Live?

Ben: Yeah, absolutely. Just on what Marc mentioned about if you make a mistake, we don't charge if you duplicate a form. So, if you do make a mistake, or a date change and so on, you can simply duplicate it, change what you need to without filling in the whole form, and you won't get charged, because I know some providers do that. So, just wanted to bring that to mind. For the PMs in the audience, you're always looking to get involved and help renters with the big move. We also work with utility providers so you can connect with them through Forms Live. Some of you may have already done so. These connections will allow you to offer utility connections which automatically pop up after the agreement is signed for your client to either accept or decline any assistance that you might be offering.

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And if you guys think being digital will save you time, connecting your CRM will take it a step further. I'm sure you all use CRMs, we do integrate with most of them, and we've seen some of our some of our clients reduce their admin time by up to 70% when connecting with their CRM.

Marc: Perfect. Yeah, so that's right, the information held within your CRM, which is pretty much addresses, contact details, and stuff like that, that information can be pushed directly into our forms, and we mean like straight into the fields, which is a major time saver, and it pretty much leaves your forms ready to send for signatures. it's also worth mentioning that with utility connections, there is an 80% click through rate from renters, which means that they are loving it, which is really awesome to see. What's next then, Ben?

Ben: Think we've just about covered it but before we sign off, I wouldn't mind touching base on the PDF completion guide if you've got it handy, because I know that's something that we've recently updated and it's a really great feature that I think those on the call might be interested in.

Marc: Yeah, so as Ben mentioned, we do have a few updates coming up. So, to upload a document to a form you go to more, files, choose files, and then upload and just like that it's attached and you can scroll below the form and you'll be able to see the document that you've attached just here, once it's loaded, and see the new updates that we've introduced. You'll see a new edit fields button on the top left when hovering over the PDF and that will bring up the PDF editor on the right sidebar here. So, you'll see that we have the option to include these fields in the PDF, you just click on the text field, checkbox, or add in your own signature fields, click them down here and you'll be able to place them inside the PDF and a recent thing that we've included is you can pull out the corners of them to adjust them in length, which is a great addition there. So, once you click save, you'll be able to directly interact with these fields and the checkboxes as well while the forms in draft, it's worth mentioning that only you are able to interact with these fields at the moment, but we are working on having clients be able to interact with them as well.

Ben: Yeah, so people might be saying why do I need this when you've got all the forms available to you? Just a few off the top of my head. If you've got a contract of sale for the sales guys that are on the call from a solicitor or if you've got a section 32, you can then attach that to our contract of sale form. A couple of others you might be adding a marketing schedule to a form that you want signed so they've acknowledged it and things like that. Yeah, a lot of great improvements coming there just a few that that are ready at the start of 2023, but we are working on a few more so I think that sort of covers it and we're happy to take any questions. I haven't seen any come through yet but if you've got any, feel free to pop them in the chat box. If you don't have any now but think of something later. Marc is going to put my details up so you can shoot me an email or give me a call, shoot me a text, anything like that and happy to have a chat.

Marc: Yeah.

Ben: None have come through.

Marc: Not yet. Well, if that's we just can say thank you for attending everyone. Hopefully that gave you some insight on Forms Live and what we're all about and yeah, if you want to be updated on any features in future webinars, then you can find us on Facebook or Instagram as Forms Live or we're also on LinkedIn as dynamic methods. Thanks everyone.

Ben: Have a good day, guys.

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