

## The Benefits of Electronic Signing

Anita: All right. Okay. I'm here to welcome you to our Webinar, The Benefits of Electronic Signing. My name is Anita O'Connor, I'm the general manager at Dynamic Methods. We're the team behind Forms Live and today with me is the owner of Dynamic Methods, David Howell. Unfortunately, our Business Development Manager, Ben, couldn't attend this morning. In today's webinar, we'll be covering what we consider to be one of the most exciting and streamlining tools in the Forms Live toolbox, Electronic Signatures. So we'll be discussing the ways you can sign electronically on Forms Live, as well as the benefits of doing so. Let's get into it. David, where should we start?

David: Well, why don't we go through the scenario when someone already has a DocuSign account outside of Forms Live and they want to connect the two together?

Anita: Excellent. All right, well, I'm going to switch my screen. I'm going to share my screen, and let's do it. All right, so if you've got your own DocuSign account and you'd like to bring it with you to Forms Live, I'll direct you to the Connections area, and you'll see we have in Forms Live. We've got DocuSign built in, so you can use electronic signing immediately. But if you have your own enterprise account, you use it for other reasons as well - within your office, you can connect via DocuSign Connections here. By clicking the Connect button, you'll go through the authorisation process. So clicking Start Authorised Process will then direct you to DocuSign, and you will log into your account.

You log in, and you will set up that connection between the two products, which is great. Like I said, if you don't have a DocuSign account, we've got it built in within the Forms Live. Does that help? What do you think, Dave? Is that good?

David: That's good.

Anita: Very good. All right,

David: So what's the difference between what are the different signing options? Because I know it's not always about DocuSign. You can sign on screen as well.

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Anita: Correct. We like to make sure that we've covered all your bases and our bases. So when you're using Forms Live, you've actually got a few different options. Here's what I prepared earlier. I've got an agreement, a Rental Agreement that I've created, and let's pretend I filled it in. All right, I've got a few details in here, but I'm going to finalise my form first. So, as you may be aware, in Forms Live, creating forms is a two step process. You create a form and it will have a draft watermark. This particular account has got testing on it, and then you need to finalise it to allow signing to happen, because that will remove the draft watermark and open up your signing option.

So I'm going to quickly finalise this form, and you'll see, once I've finalised a form, a signing button appears at the top of my screen, at the top of my form, and the sidebar changes from reminding me I need to finalise first and then go into signing. So the options we have available to us, if I use the signing button, you'll see we've got both Sign-on Screen as well as Remote Sign. So if you have a client who's come into your office now that we can all get out and about and see people, you can use the sign on screen option, which allows you if you've got a tablet device or a touch screen on your computer, on your laptop, you will literally walk through all of the signing options.

So you're logged into Forms Live, you turn your tablet around to your client and you would walk them through signing on screen. They'd agree, they'd start the process and it flows through, taking you down to each of the areas. You can use one of these groovy little pens, I'm sure you might have seen those before with the little rubber top. Otherwise if you're using a tablet device, this works just as well. I'm going to use my mouse and you can sign-on screen in front of your client, and you can sign on screen in front of you. It would walk them through each of the signing areas and Complete would take them to completing it. And not only do we sign, but we also add a date. That's cool for when you've got someone in your office signing in front of you, the other signing option we have is the ability for you to send via DocuSign.

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Whether or not it's using the inbuilt DocuSign licence that we've got within Forms Live or whether it's the DocuSign licence that I connected to my Forms Live account. When I'm using the signing process using DocuSign, you'll notice that the sidebar I've signed Renter One signed on screen in front of me - now I've only got my Renter Two option available and I can click next I've got that DocuSign dialog which I can change the subject sign, I can change my message and then by clicking Send, we're putting in a black box, aren't we, David? Putting in DocuSign's black box and sending it off for signature. So you'll see on the right hand side, it gives you the details of when the envelope was sent, the message that you changed within that DocuSign dialog and who it was sent to.

What we find, and David, you could probably give us a bit more insight on the research about the timing that it's come back when we're using electronic signing in Forms Live.

David: Yes, it's interesting that with the use of DocuSign, we've seen up to 95% of rental agreements being signed within 24 hours of being sent and also the sales agency agreements within just 6 hours - and that has actually reduced over the last three to four months due to the market and everything. So speed is of the essence and obviously DocuSign allows you to do that very quickly. A couple of other real quick stats. The most popular time to sign a rental agreement is between ten and eleven in the morning or four and five in the afternoon, which is quite unusual, but that's when the Renters tend to sign the agreements during the weekday that is.

Anita: That's interesting. That means all of you agents are out there madly clicking the keyboard between ten and eleven or trying to get it done before the end of the day. Love it. And those turnaround times are amazing. I think that's the most significant change that we've experienced over our years of working with form platforms around Australia is the adoption of electronic signing. Yes. The last two years. Yada, yada. But also the expectation of clients to have something delivered to them that they can not only read, but also sign and get back to you. It's just amazing. While we're talking about signing, I'm on the Forms Live Forms page, and you'll see that I've got icons showing me I can filter to see what's out for signing. So this is a good way for our subscribers to take a look at. Right. I need to follow up on someone that form is still out for signing.

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And when you hover over those indicators, it tells you exactly who's the outlier, who's the person that you need to contact, which is quite cool. All right, well, that's good for signing this. Did we need to talk about signing, David?

David: I think this is probably one of our most popular features. Most people know that we can attach PDFs to forms, but can people sign those PDFs when you send them out via DocuSign?

Anita: Excellent question. Absolutely. You know what I'm going to do? I am going to quickly duplicate the form that I just created because I'm going to show you how you attach files and add signatures. So what we've found is many agents have their own documents that they've set up that they would like acknowledgement, in this case from their Renters, to acknowledge that they have read it. A signature is a nice thing to have on that plausible deniability. Is that what they call it? If they've signed it, that's a good thing. So I've got this open, this draft renters agreement. I'm actually going to finalise it so it'll take me through to that signing process.

Now, what I'm going to do in this side panel, this signing side panel, I'm going to scroll down to the bottom of it. Now, if I had already attached files using my More button and files, you would see the files that are available. But I can also select from here to pick up any files I want to attach, PDF attachments. So I'm going to go find my files. Let's take a look. I'd like to add my Renting Home, a guide for tenants that may be one in my agency that I've created. And I'm also going to add another form. I've got my special Anita clause. I'll show you that in a second. So in this file attachment, I can change the order of where the attachments are showing the order attached to my form. The one thing that I think is cool, because I like everything in one spot. When you attach PDF attachments to a Forms Live form, when your client, the person you're sending it to, opens that form, it's a single PDF. So you've got their attention, you've captured their attention. It's not separate PDFs. It is a single PDF, because I'm sure that you've all experienced, Oh, I didn't open that one. So we like the fact that it's a single PDF. So I've attached those PDF attachments to my residential rental agreement. And now I'm going to click on these three dots because I want to add some signatures. What we do is reference the signatures that are available within this form, so they will vary depending on the form that you've created. You can see I've got a nice little clause about on the anniversary of renting this property, they've got to give me box chocolates.

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Awesome. I want them to sign off on it. So I'm going to select my renter, and when I click, I can drop their signature fields and the date they signed into this attachment, and it will navigate. When I send this to my renters, it will navigate not only through my rental agreement for the signatures, but also this PDF attachment, which I think is very cool.

So I'm going to save, and that is now ready for me to send for a signature with my attachments. Same process that we went through before. I think that this is a great tool. It makes sense, and it keeps everything together within the form's life. What do you think, Dave? That's pretty cool, isn't it?

David: Yeah, it's definitely a popular feature. It's very useful. So probably the other question I have, that we have quite a bit, is what happens when I send something up for signing and the signer, so the renter says they didn't get the email and they want you to resend it, or maybe you've made a mistake on the email address and you need to fix it up and you don't want to have to go through and recreate the form.

Anita: Good question. It's something that we've addressed because obviously we get these types of questions on our support line and it made sense for us to address it within Forms Live itself. So let's pick one of these forms that I've got that are still out for signing, and I'm going to open this particular one. And I can see both Alex and Nadia have not signed this form, and they've gone through exactly that scenario. As you said, David, I can go into that form, go into the side panel for signing, and you can see here oops, I've definitely made an error here. It hasn't been delivered. I've got the wrong address. And I can hop in and either send it immediately, not in this particular case, but I'm sure that we've all experienced it - when you've sent something or you've received an email and someone reminds you of having it, oh, I can't find it, just resend it. I could click Send Now and that would pop it to the top of their mailbox. Or in this particular case, if I needed to change an email, I can hop in and I'm not changing the form itself, just the email that it's being delivered to. Nadia contacted me and said, hey, I'm having problems with my email account, can you send it to my other email account? I'm going to do that. So I've altered the email address that I have for my client and I can send it. So you can use resend, just a single resender option. If I want to put it at the top of my client's mailbox, or if I need to edit or change the email address because I've put the au the wrong way or simply misunderstood the email address, I can alter the email address.

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Both of these are within the signing panel, within the form. I think that's pretty cool. What do you think? What other questions do we have David?

David: This is another common scenario. Well, not that common, but what happens when I need additional rental providers or additional renters or additional clients in certain forms and they're not on the standard form?

Anita: Awesome. I'm absolutely cool, that's cool. What I'm going to do, I'm going to duplicate again because I want to open my form up. I want to open my form so that I can make some alterations. So let's duplicate. So we do have this scenario happen occasionally in the standard form, in the standard. And I'm picking on the rental agreement because it's the most popular form we have set up for renters and two rental providers. And obviously there are some scenarios where I might have five renters or I've got two couples that are rental providers. For this particular property, we have available in certain forms and actions which allow additional signatures. So in this draft form, I'm going to the more button and I'm going to annexes. And what you'll see here is I've got an annexure for additional renters and for additional rental providers. Most forms, most forms that have this type of scenario, it's not for every single form. Take a look at annexes first. Take a look for those options. When I update my form, what I'll find is the first thing that appears in this rental agreement. Additional text has appeared saying, hey, here's your form, but there is an annexure with additional renters and the same with my rental providers because I chose for both - and I'm going to scroll down in my form and show my original signatures. Here are my additional rental providers. So it picks up on those questions that the additional rental providers have to answer. So we have got them selected separately. And we also have an area where you could have up to eight renters within this form with their own questions about delivery of documents by electronic methods. When I finalise the form, which I'm going to do now, you'll see in the sidebar four signatures. I've got four rental providers and I've got all eight of my renters listed. So always take a look, check additions first, all right? That way we can have as many renters as you need.

David: So George has actually asked a question, and it kind of leads into where I was heading next anyway, asking about what list of forms or templates we have available in Forms Live.

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But also while you're in there showing them that, how can I tell which forms are signable or stampable? All those types of things as well. So let's do both of those.

Anita: Thanks David, and thanks George for asking that question. Questions are always good, informs life. I'm going to go to my list of forms available in Formslive. So I'm in the Forms menu and the top right is where I can create or see the list of all available forms that we have our form suite within Forms Live. So by clicking Create, I can see here my list of property management forms which cover a couple of COVID letters. I've got my Managing Authorities, The Rental agreement, Rental Application. I'm going to scroll down, Pet Request form, Notice of Intention to Sell. I've also got a group of Sales forms covering Commission Sharing, your Sales Authorities, Auction Bidders, Rebate Statement. We also roll through into Commercial Forms; Leasing and Management Authorities, a Commercial Lease, Disclosure Statements, Reminder Notices and even Business Sales. The big suite of forms. And what you'll notice on this screen we've got some icons indicating what you can do with these forms. So most are set up, most if not all for DocuSign-ing. So if it's got that DocuSign indicator, it means it is enabled to be sent off for electronic signing via the built in DocuSign account or your own DocuSign account. We've got Sign, which was that sign-on screen which I showed you. So most of the time they're buddied up that you can do both sign on screen and DocuSign-ing - remote or within the office. Some have got a stamping ability setup that you can place your signature, so then it can be simply emailed out. So signature Stamping, we set up in Forms Live generally only signed by the agent on behalf of the rental provider. So this allows you and I'm going to select this Notice of Renters Entry to Rented Premises, Notice of Entry and when I create, it gives me the option in a draft form that I can add my signature. This yellow box, when I click, I can drop in my signature. It's as easy as that, because it's only the agent that's signing on behalf of the rental provider. I can then finalise this form and email it. If I've got that acknowledgement that they can have electronic means, service of notices by electronic means, I can then send this. I don't need to send it to myself for DocuSign-ing, I can simply share it and they will receive that new document with my signature stamped on it. You can upload your signature in account details within Forms Live under your user profile and you can upload your signature. So another way of saving time.

Did that cover your question, David and George's question?

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David: I think so, yes. Thank you.

Anita: Wicked. Very cool. So, as you can see, we've got a few options for signing forms. Being able to get your forms out to your clients and back from them in that speedy time of between six and 24 hours. Why not? You've got better things to do than waiting for things to come back. Let Forms Live do that lifting for you. So I think that's all the questions and what we needed to talk about. David, were there any other questions from our audience?

David: I've just got one question here and I'll answer this one. It was a question around DocuSign. So just to clarify, if you already have a DocuSign account, that's totally fine, you can connect it straight to Forms Live. If you don't have a DocuSign account, that's fine as well, because as soon as you register Forms Live, you have immediate access to send things via DocuSign within Forms Live. And then if you want your own DocuSign account and you don't have one, you can also get one through us as well. So we kind of cover all the bases there. So you don't have to have one if you want to use Form Five and DocuSign. But if you do, it's absolutely no problem.

Anita: Brilliant. Well, if that's it for questions, we'd like to take this opportunity to say thank you for joining us today. I think I hope that you've all learnt something about the electronic signature options and in Forms Live and the many ways that it can benefit your agency. If you have any other questions about Forms Live, please reach out to Ben. Ben's our BDM, who unfortunately couldn't be online this morning. But he is more than happy to talk you through everything I've spoken about. With a few more words, he'd be happy to talk to you about Forms Live and you can see his contact details on the screen now. You've also got the ability within that in Forms Live itself to reach out for assistance.

David: We've just had another quick couple of questions come through. One is about pricing, which is a very good question. Forms Live starts off at \$499 per year. That includes the DocuSign feature within Forms Live, so that's all inclusive. Depends on the size of the agency, though. But the starting price is \$499 per year. And Eddie has just come in with another question around documents that are sent to all parties, and sometimes it shows sent and other times it shows created. Can you explain why?

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So it's a bit of a technical question, Eddie, in terms of when you sign something for DocuSign, there's various events that we are given, and one of them is when we first send something to DocuSign, it gets created and then it gets sent via email. And with DocuSign, that can be a matter of seconds between the two, or it could be a matter of minutes. So that's why sometimes you'll see it as created and then other times you'll see it as sent. So that's the difference between the two scenarios. And then as it gets sent, it'll get delivered, or it might get reported because it didn't get to the sender as well. So these various stages that form size will tell you that the DocuSign envelope is at, to help you understand where everything is but created and then sent is the standard process for that.

Anita: We also have, David, some forms that we have the rental provider or the agent sign last. So we do put an ordering on, which is the other scenario where you'd have that created. So in the Residential Renters Agreement, Rental Agreement, the renters would sign first. Renters would sign first, and that's where it created comes up. Very cool. All right. George has asked another question. Our authorities are created by we're in partnership with Colin Biggers and Paisley. They're a large property firm within Victoria. So they keep us up to date with legislation and we keep our forms up to date as necessary, which was very exciting last March.

David: Just to add to that, George. So our forms are our legal counsels, Colin Biggers and Paisley, which happens to be the legal counsel for some other property forms in other parts of the country as well. So you can be confident with that. Also, George, what I might do is I might ask Ben to reach out to you and have a chat if you've got any more questions, if that's okay.

Anita: Awesome. Well, thank you one and all for spending half an hour with David and myself to unravel electronic signing in Forms Live. I hope you all have a lovely day and keep an eye on our newspaper and our EDMs for our next webinar. We're trying to keep this as a series every few weeks just to give you a little insight on how to use Forms Live and how to make your agency as productive as it can be. Thank you all for attending and we'll see you next time.

David: Thanks, everyone.

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