

All The Forms Webinar Transcript

Marc: Good morning, everyone. Welcome to Forms Live's latest webinar. 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 two Form Gurus, Ben Slawitschka and Chelsea Dwyer, they're Forms Live's Business Development Managers - And it's the first time we've had two people on at the same time, which is exciting - For starters, if you have questions throughout the sessions, use the Q&A feature or the chat. We'll answer them as soon as possible, and we'll leave time at the end of the session to answer questions as well. So, today's webinar goes back-to-basics. It's about Forms Live having all the forms you need. We'll be taking you through all the forms available, how to complete those forms, and lastly, which tools will have those forms completed as fast as possible? So, let's get into it. My first question for you two is...on our website, we say all the forms you need, what exactly do we mean by that?

Chelsea: Well, Marc, we mean exactly that - every form an agent or manager could need for real estate transactions in Victoria - and that's actually over 50, If you want to be specific about it - we really made it our mission to provide more than just the essentials. When it comes to forms, we have everything you need across all segments of real estate, even the forms you don't realise you need yet. Starting with property managers, we of course host the Residential Rental Agreement, as well as all the Notices and Authorities vital to day-to-day business, so, we've got the Residential General Leasing & Managing Authority, the Residential Exclusive Leasing & Managing Authority, the Notice for Renters of Rented Premises, and the Notice of Rent Increase.

Ben: And the same goes for your sales departments, as you'd expect we have a Contract of Sale as well as various other forms and statements that are available - including your Exclusive Authorities, Auction Authorities, Buyers Forms - if you're acting on someone's behalf - we also include Commercial Forms. So, if you're a business that is involved with commercial, as well as business sales forms as well.

Contact our *Business Development Managers*:

Ben Slawitschka

 | 0419 165 989
 | bens@formslive.com.au
 | calendly.com/bensformslive

Chelsea Dwyer

 | 0488 002 539
 | chelsead@formslive.com.au
 | calendly.com/chelsead-formslive

Marc: Fantastic, and as Chelsea said, you know, we really want to cover all our bases and make sure that you're equipped for any and all situations out in the field - do we have any hidden gems we can share with our viewers, Ben and Chelsea? Forms that they might not be using at the moment that could definitely make their lives easier.

Chelsea: Absolutely, one of my favourite ones is Cover Pages, so, we have two types of Cover Pages as Marc is showing you now. And they have their own section on our Forms List, we have the Contract of Sale Cover Page and the Section 32 Cover Page. So, if we open them up, they look pretty basic, however, they serve a pretty specific purpose - for example, if you have a Contractor Salary Section 32 prepared outside the platform, which is most likely the case, you can attach them to these forms using the Files option in the More tab, then uploading - and then you can even edit the attachment with text boxes, checkboxes, and also signature fields, that way you can still utilise Forms Live's tools even on forms that haven't come from our platform.

Marc: Great, I'm glad you mentioned those, Chelsea, I think those forms are super handy since as we mentioned, they are often prepared outside of the platform and a lot of people like to keep the process in one single location - if that's all how about we jump into a form and go through the basics of form creation and completion?

Ben: Sounds like a good idea, Marc. So, step one, we obviously go to our Forms Tab off to the left, and we click Create off to the top right-hand corner, which brings up the list of forms that are available. We highlight the one that we're after or you can actually search - so, if we were going to pick the Residential Rental Agreement, like Marc selected, we need to give it a name - this one we're going to give test. We click Create, and then the form opens and is ready for data input. Now, you can fill it in, it's as simple as that, as Marc is doing - checkboxes, any other data required. Once we finalise, it'll lock - the top right-hand corner - once we're finished, we're ready to send off and start signing.

Marc: Perfect, short and simple, that's how we like to keep it here at Forms Live. But here's the big question. How can we make form completion even simpler? What tools can our viewers use to reduce admin time as much as possible?

Contact our *Business Development Managers*:

Ben Slawitschka

 | 0419 165 989
 | bens@formslive.com.au
 | calendly.com/bensformslive

Chelsea Dwyer

 | 0488 002 539
 | chelsead@formslive.com.au
 | calendly.com/chelsead-formslive

Chelsea: Well, I think a good place to start is probably the CRMs. So I'm sure as many of you know we do connect with most of the major ones and are open to connecting with many more if you have any request - So, let's go through them, from top to bottom we have, Agentbox, Ailo, APM PriceFinder, Console Cloud, Eagle, Inspection Express, Inspect Live, Inspect RealEstate, MantisProperty, Palace, PropertyMe, PropertyTree, Reapit, Tenant Options, the Property Platform, Trudi and VaultRE - Okay, we can't actually add anymore because I'm out of breath! So, starting with the obvious question, why? Why connect CRMs to Forms Live? Well, CRMs hold so much data and it's data that you end up re-entering into your forms later on. So, why not streamline the process, it also saves mistakes, saves double handling and saves typos! So, if you connect your CRM to Forms Live, the next time you need to create a form, you can then funnel all the data held within the CRM straight into the generated form's fields at the point of creation, saving you loads of time usually spent on admin work.

Marc: That's right, and I think we've estimated that it's actually erasing about 70% of the usual admin work that goes into forms! And Ben, in relation to that data, it's also possible for our viewers to have their clients complete fields on their behalf isn't it?

Ben: Sure is, Marc, we have a great feature called Info Request, those that are familiar with it will notice that it's available on more and more forms at the moment - at first, it was only available to a few. Off to the right-hand side, the little blue mark that Marc is looking at there, Info Request, is the perfect way of saving you from having to play phone-tag and chasing down new clients with things. Probably, the best example would be a Rental Providers Instruction where you can send it off to your Rental Provider, they fill in the details that you're after, such as bank details, insurances, and things like that - and then it's sent back to you in a completed form for you to finalise.

Marc: Yeah, it's a really handy tool for agents who are tired of playing phone-tag, like Ben mentioned - now, is there a way to complete a form and then re-use that data in the future? So, you aren't having to fill it out again and again?

Contact our *Business Development Managers*:

Ben Slawitschka

 | 0419 165 989
 | bens@formslive.com.au
 | calendly.com/bensformslive

Chelsea Dwyer

 | 0488 002 539
 | chelsead@formslive.com.au
 | calendly.com/chelsead-formslive

Chelsea: Absolutely! So, we actually have templates for this - templates allow users to create forms that can be used for more than one transaction. So, once prepared, these templates contain pre-filled data that can be used to create forms so that all the saved data gets transferred into the new form immediately. I was speaking to one agent the other day, who was saying that she actually sets up templates for each of her individual sales agents as they all like slightly, particularly different things on their forms, and it worked really, really well for that office. So, that's one example of how templates can be used, but, let me talk through the process with you all for the template. So, you hit create and search for the form you're after - it should be noted, all available forms can be turned into templates - give it a name and click create again.

Marc: Great! Sounds good to me, I'll also mention that attachments and annexures can also be added to templates - and that way you aren't having to find and attach the same documents all the time. Now, why don't we discuss the signing options available on Forms Live?

Ben: Marc, well I suppose it's a very important thing...we need these documents signed - so, Forms Live has eSigning built-in and there's no need for an external subscription or anything like that. Remote signing is as simple as finding the sign tab, and- as you can see, it'll have the details there for your Rental Provider or Vendor or whatever form you're using - that's sent off to them via email, they receive an email with the form, they open it up, they agree to the electronic signing, they review the form and then sign it electronically. Once that's done, you'll get an email notification that it's been completed and it also includes a certificate to give you the information of when it was received, when it was opened, and the IP address - so, everything's crystal clear.

Chelsea: Right, and if you're more inclined to invite sellers into the office to sign in-person or you go to them, a process that remains fully electronic within Forms Live is called Sign On-Screen, choose this option from the above Sign Tab. Once the signee has been established, and the terms agreed to, the client will be guided to the signature fields as highlighted in yellow, then prompted to scribble in their signature - So, mouse, finger, or stylus are the easiest ways to do this - and then they'll be done, this way forms and signatures are still stored in one secure location.

Contact our *Business Development Managers*:

Ben Slawitschka

 | 0419 165 989
 | bens@formslive.com.au
 | calendly.com/bensformslive

Chelsea Dwyer

 | 0488 002 539
 | chelsead@formslive.com.au
 | calendly.com/chelsead-formslive

Ben: And if you're ever faced with a form that requires one signature - you can actually upload your own signature under your account details in Forms Live by the Account Settings section - And then that signature can be dropped into any form with the stamp label that Marc's pointing at there - saving you time, rather than having to sign it each and every time.

Marc: Perfect! Well, those are my questions hopefully that has given everyone a deeper understanding of the forms we offer - and a newfound appreciation for them as well as the tools - we really do want to cover all your form needs, so if you have any forms that you want to see on the platform, then please reach out! If you have any questions, then we will use this time to flick them into the chat or use the Q&A feature, we'll answer them as best we can. Before we go, I would like to spotlight the 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 mention your name when subscribing, you can claim additional months for every person you successfully refer us to - for more information on the program, I'll point you to our Partners page where you can sign up, that's found on our website, or you can contact Ben and Chelsea - their details are now on the screen. They're also happy to discuss forms with you, help you set up a free trial, and even assist you with pricing for your office. Awesome. Great. Thanks for joining us today, everyone!

Ben: Have a good day guys!

Chelsea: See you later!

Contact our *Business Development Managers*:

Ben Slawitschka

 | 0419 165 989
 | bens@formslive.com.au
 | calendly.com/bensformslive

Chelsea Dwyer

 | 0488 002 539
 | chelsead@formslive.com.au
 | calendly.com/chelsead-formslive