Forms Live's PDF Completion Guide

Marc: Okay, here we go. Excited for your first webinar of the year, Chelsea?

Chelsea: I couldn't be more excited. Hi, everyone. We're so happy to be back with another webinar. I'm Chelsea Dwyer. I'm the Business Development Manager and Implementation Coach at Forms Live and I'm joined by Marc Persico, our Content Creator. Please feel free to introduce yourselves and which agency you're repping in the chat. We'd love to know who's tuning in. If you have any questions throughout, we'll be sure to keep an eye on the chat in the Q&A feature. So please put them in those and we'll address them as we go. Okay. Let's get into PDF completion. First and foremost, Marc, how do I attach documents to forms?

Marc: Okay, it is such a simple process Chelsea, I'll give you guys a quick example here. So, for those watching, in your form, you go to more than click files and you click choose files, click the required file, and then upload and you've attached your form just like that. But it's important to note that with print with form by default ticked, you'll have the attachment appear below the form itself, so in line with the form, and you want that ticked if you're going to be using the tools, we'll be showing you today.

Chelsea: Right, so if I then wanted to fill out the fields of the attached document, how could I do that?

Marc: Yeah, well, it's not a difficult process at all, Chelsea. So, if you guys have used this feature, before you notice the process is a little bit different from the older process, due to some recent updates. So now, to find the edit fields button, you find the attached PDF, hover over the PDF, and you'll see edit fields on the top left. So, you click this button, and the PDF editor will open on the right side as a sidebar. And Chelsea, you mentioned filling out PDF fields - you see here, on the right side, these are the field types that you can add, the text fields and the checkboxes.

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So, you simply click the field type that you're after, drop it in, and then you can drag it into the position. And an awesome feature that we've added with our recent update is the ability to edit the length of text boxes specifically, by dragging the edges inwards or outwards. And yeah, we just really wanted to give you guys as much freedom as possible here. If mistakes are made, which is inevitable, you know we're human, we added a shortcut menu here. So, you can see which buttons you need to click to copy, delete, and paste all the fields. So yeah, and let me just finish this bit here. Once everything's in place, you can click save. And I'll just demonstrate how you can interact with the form from here. So, as you can see, you've added the fields, and you can directly type into the form, which is awesome.

Chelsea: That's really handy actually for sales. Can we just clarify, can anybody fill out those added field types?

Marc: Yes, that's a good question, Chelsea. So not just anybody can interact with these fields. It's only for the agent or manager who added them to the PDF. This can only be done while the form is in draft as well. But that is with any form on the platform.

Chelsea: Excellent. Got it, Marc. And since our viewers have successfully filled out an attachment and are ready to send the signatures, how can they go about doing that?

Marc: So, it's not too different from the process that I've just shown Chelsea. I'm just going to play this video here because it'll show viewers not only the preparation for signatures, but also the signing process for clients as well. So, as you can see, it's a pretty simple process and the signing actually just remains the same as any standard form on our platform.

Chelsea: That's awesome. And how can these tools enhance with the use of our new cover pages?

Marc: Yes, well, for those who don't know we have added two new cover pages to the platform and that's the Contract of Sale Cover Page and the Section 32 Cover Page. So As the name implies, these pages were specifically designed to have the respective Contract of Sale and Section 32 attached to them. I'll just show you our forms list now because we've added a new category here called sales cover pages.

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So, if you've had either of these forms prepared externally from forms live, so by a lawyer, then you can still utilise our tools by attaching them to one of these pages, you'll be free to edit and interact with forms, send for signatures with DocuSign, and use all the nifty tricks you've learned today.

Chelsea: That's so good. I think that just about covers it, Marc. But before we wrap up and ask the questions, is there anywhere our viewers can go for further assistance with PDF attachments?

Marc: Absolutely. So, I'll point you guys towards our new learning centre. It's something really cool that we've only just launched, we basically put together all our walkthrough, videos, feature spotlights and even our webinar recordings into one easy to navigate platform. So, if you're having trouble with forms or features like PDF attachments, this is definitely the place to go. I'll just quickly show you guys around here. As you can see, we have different categories for different topics and if you're after assistance with PDF attachments, we've got a category for that. We'll always be adding videos to this. So be sure to check it out every now and then and on the topic of webinar recordings, I will remind you guys that you will be getting a recording of today's webinar if you want to revisit the topic or share it with your team.

Chelsea: That's awesome. So, shall we take a moment to see if anyone has any questions? Remember just to pop them in the chat, guys, if you do. Okay, well, I hope you guys have enjoyed the webinar and have a better understanding of the platform. If you have any questions or you'd like additional information, I'll point you towards my details, as well as the details of my fellow BDM, Ben, they are on the screen right now.

Marc: Perfect. Thanks for tuning into everybody. If you do want more updates on upcoming features and upcoming webinars, then you can find us on Facebook or Instagram as Forms Live or on LinkedIn as Dynamic Methods. Thanks for joining us today, everyone.

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